RingCentral

Integrations · https://learnpcr.pcrecruiter.net/site/docs/integrations/ringcentral/

If you do not see the RingCentral option in your database settings, please reach out to your account manager or the support team. They will be able to assist you with turning on the RingCentral integration option within your database. Please note that this must be done prior to any user setup in the instructions below.

RingCentral App Setup

Download the RingCentral App

Each user who will be using RingCentral will need to download and install the RingCentral app:

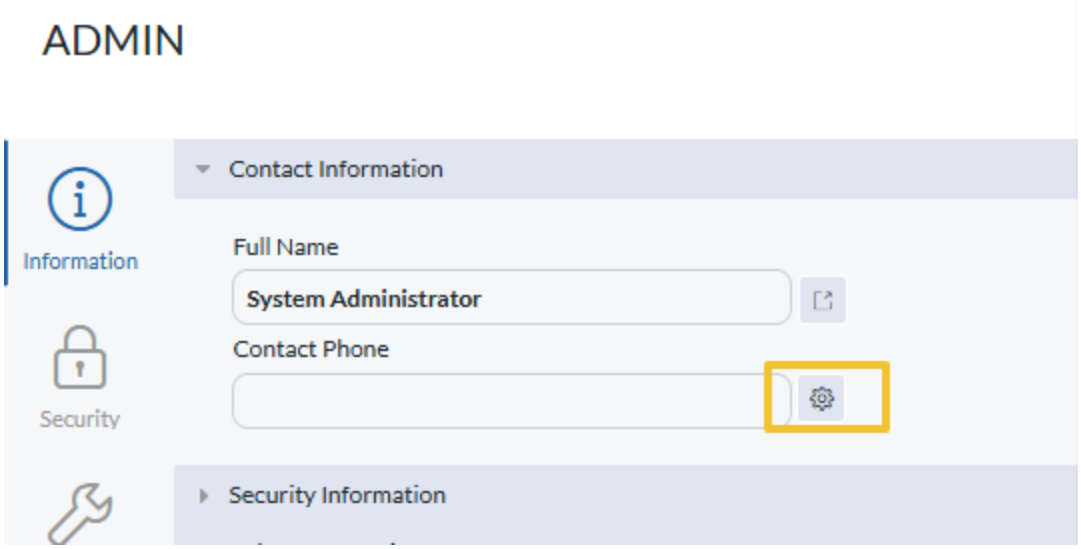
- PC (Windows): https://app.ringcentral.com/download/RingCentral.exe
- Mac: https://app.ringcentral.com/download/RingCentral.pkg

RingCentral Setup (Administrator Steps)

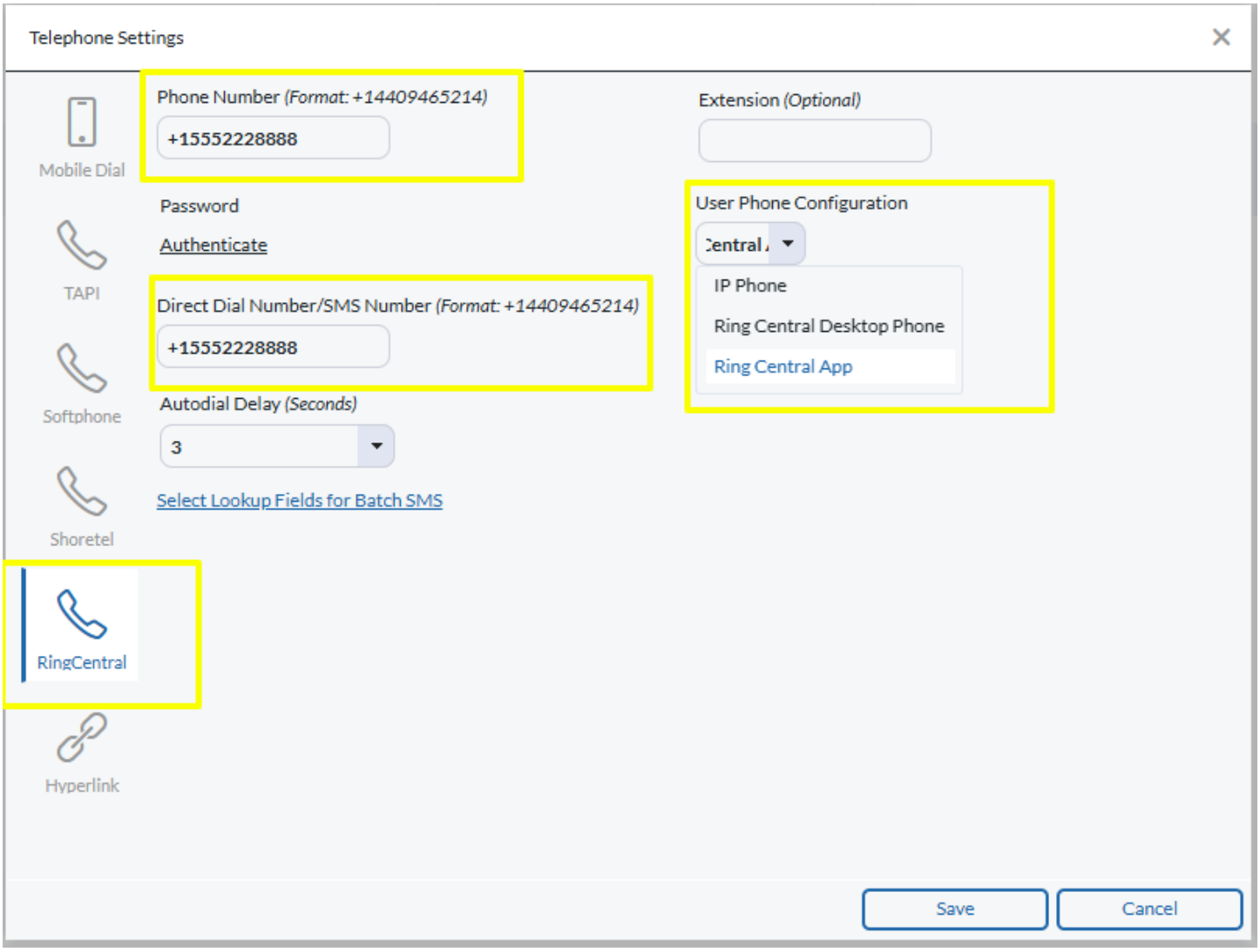
Set Phone Configuration for Users

Please note that this is a one time step that must be enabled by an administrator.

1. Select **Settings** from the Main Menu.
2. Select **Users**.
3. Choose **Manage Users**.
4. Select the **User Name** you wish to enable RingCentral for.
5. Select the **Gear** configuration icon next to the Contact Phone field.



6. In the Telephone Settings panel, select **RingCentral**.
7. Enter the user's direct number in the **Phone Number** and **Direct Dial Number** fields. The number must be entered in the +1 format as shown below. Do not add the extension.
8. Set the **User Phone Configuration** dropdown to RingCentral App (Unless using an IP Phone).



9. Click **Save**.
10. If you are setting up for yourself or have the person's RingCentral password, you can click Authenticate to log in to their RingCentral account to authorize the connection. If not, an Admin user will need to authenticate their credentials from their user account.

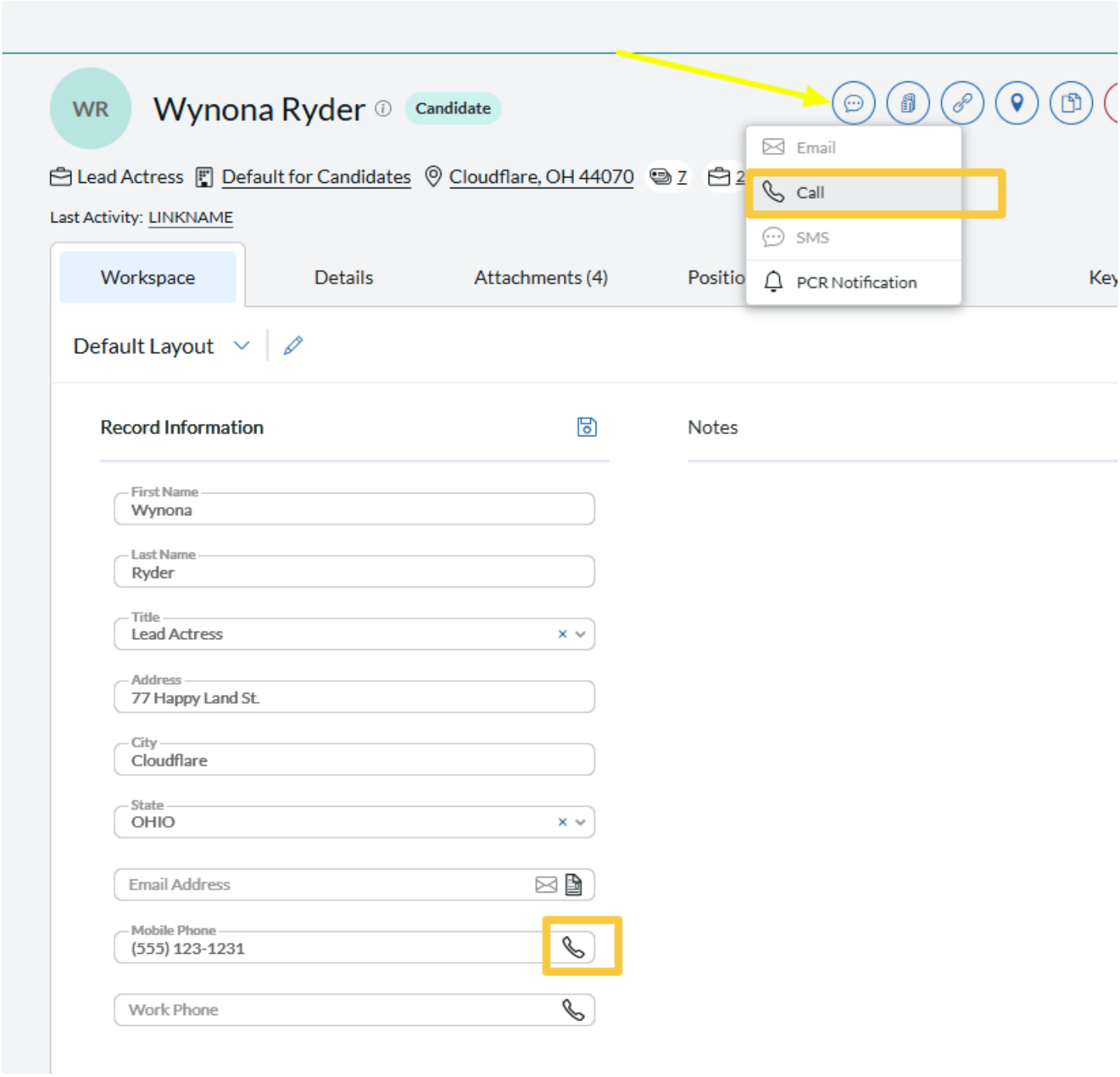
Using RingCentral in PCRecruiter

Dialing

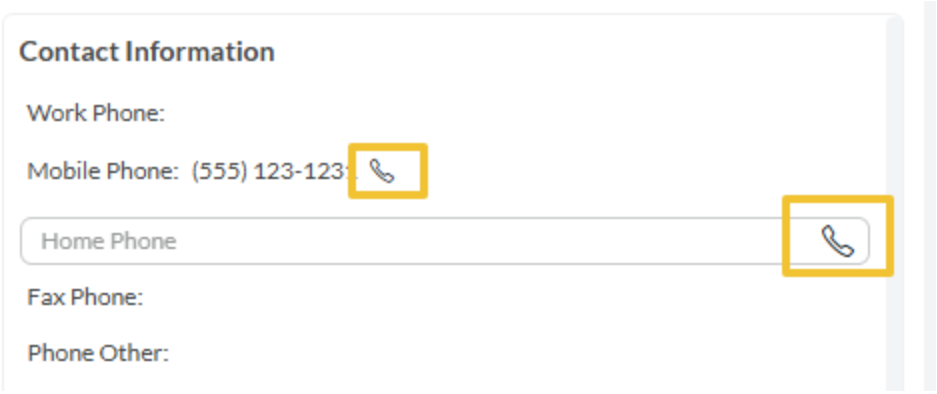
Using click to dial to call out of PCR can be done in a number of different ways, each of which have been described below.

- Name/Company/Position Record

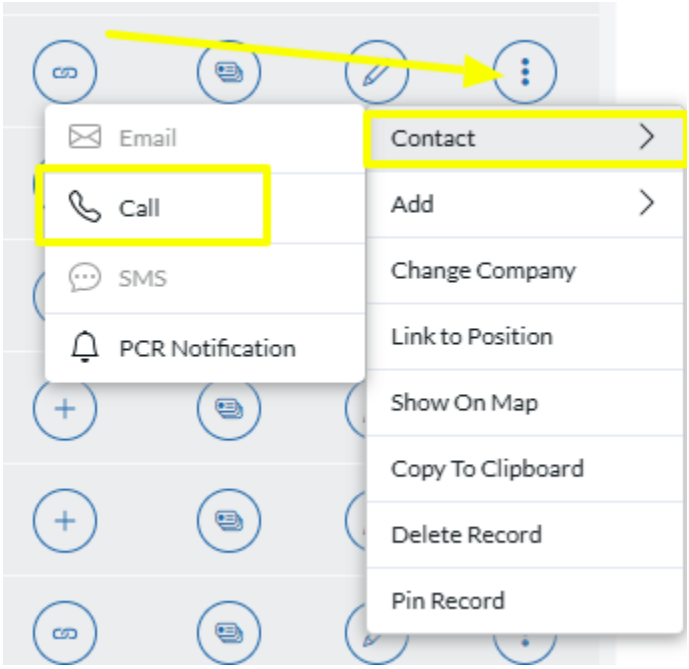
- Click the phone icon to the right of any phone field in a field list Widget in the Workspace tab, or click the Contact icon in the top right of the record and select Call.



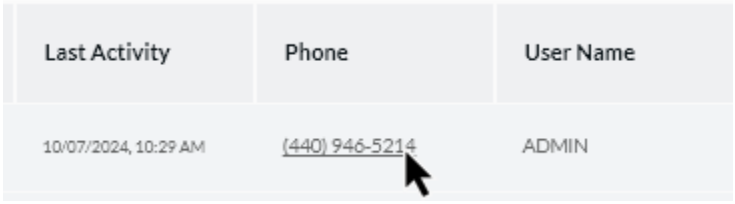
- From the Details tab of the name record, click on the phone icon to the right of the phone field. (This also works when editing a field).



- Record Grid / Quick Search
  - From a Quick Search, Record Search, Activity Search, Rollup, or Dashboard widget grid, click on the Actions icon, click Contact, and select Call.

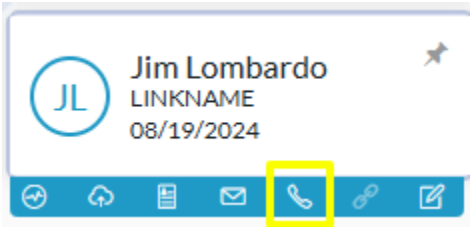


- From any Record Grid with a phone column, click on the number to dial.

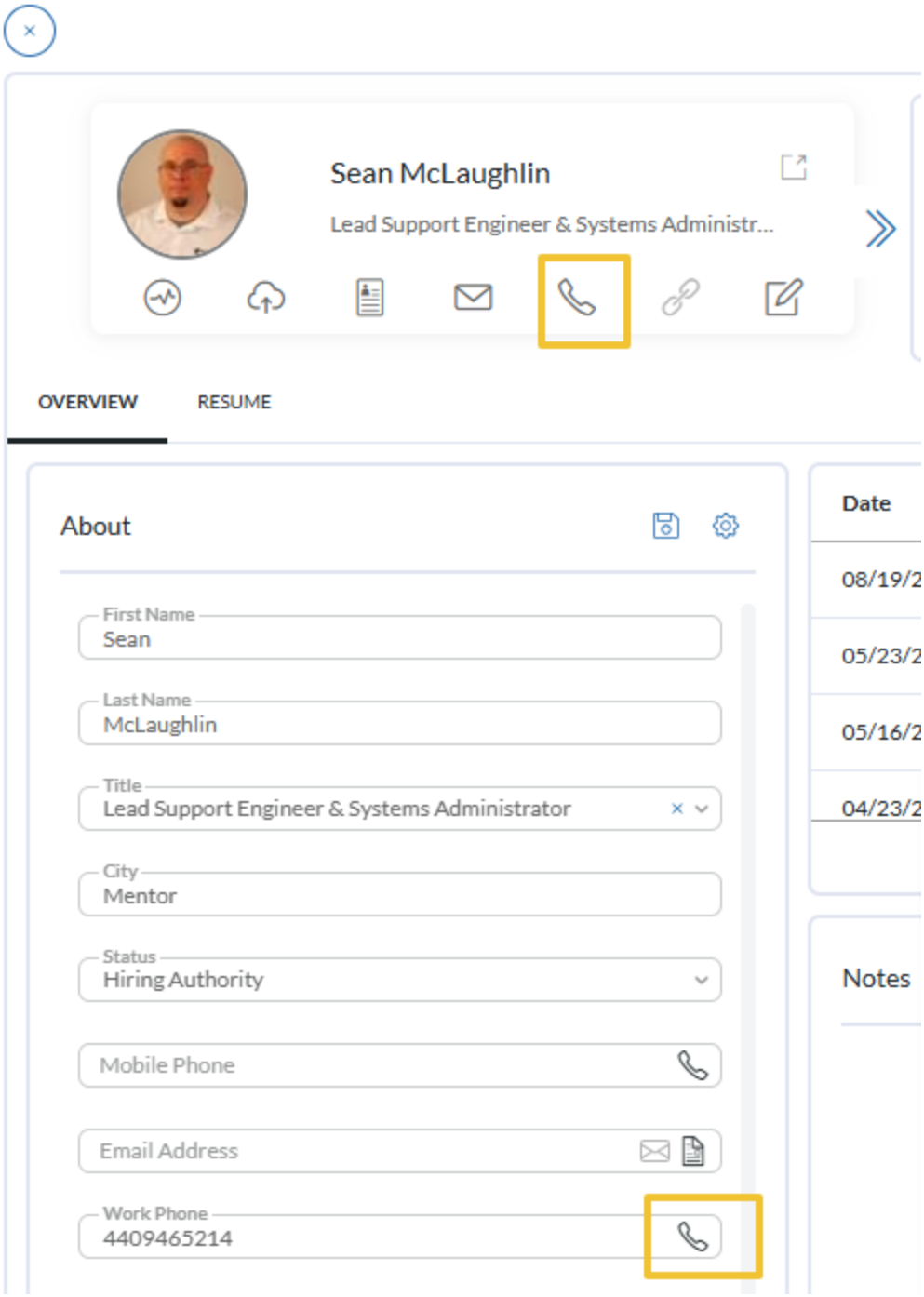


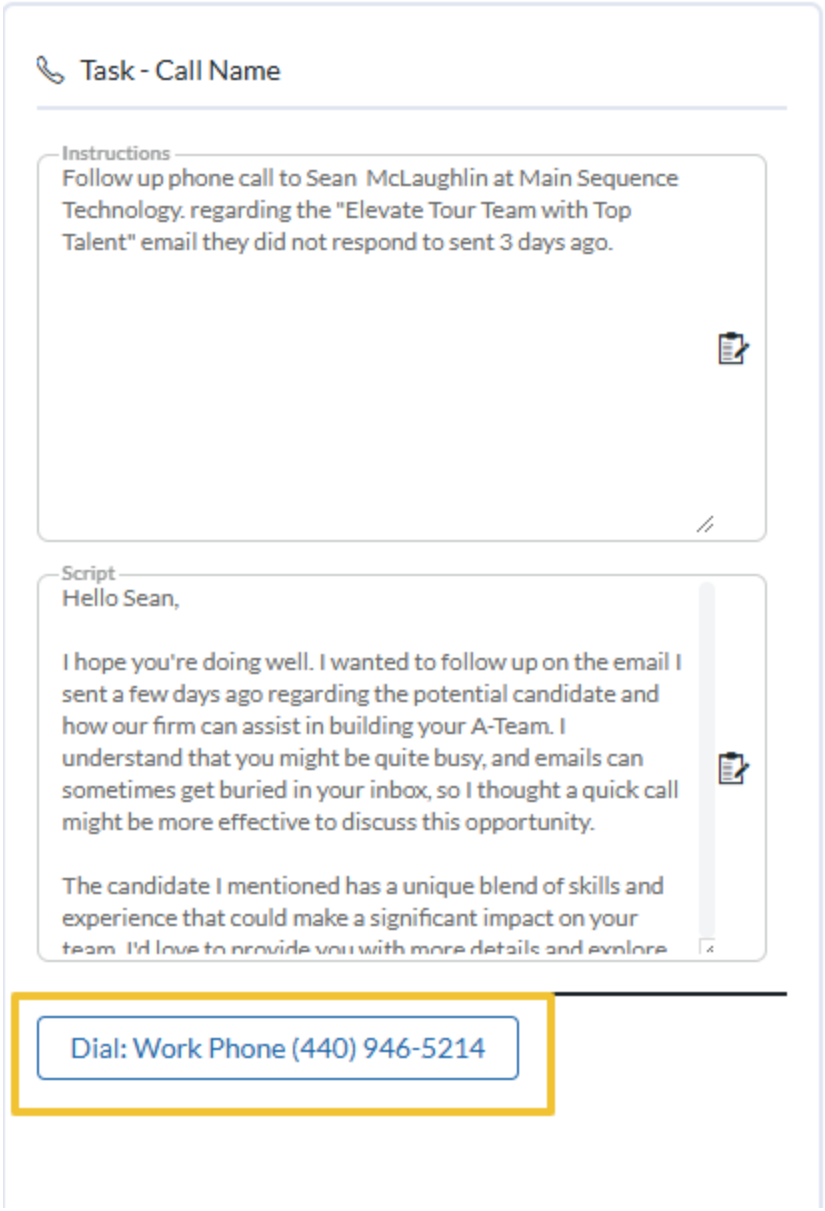
- Pipeline

- From a Candidate record card, click on the phone icon to open an activity window then click the number you want to call. (If you do not see the icon please reach out to support for assistance changing this setting.)



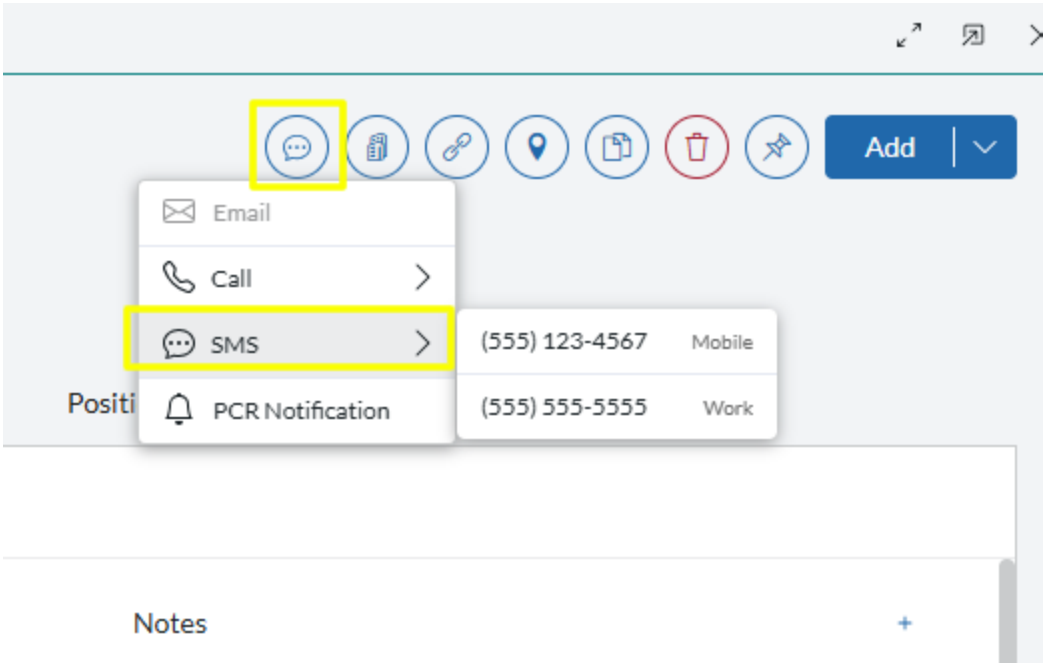
- Simple Or Advanced Sequencing
  - From the Candidate record, click on the phone icon to the right of the phone field, or click the phone icon in the record card.
  - From the action pane of a Call task, click the Dial button.


Sean McLaughlin
Lead Support Engineer & Systems Administr...
OVERVIEW
RESUME
About
First Name
Sean
Last Name
McLaughlin
Title
Lead Support Engineer & Systems Administrator
City
Mentor
Status
Hiring Authority
Mobile Phone
Email Address
Work Phone
4409465214
Date
08/19/2
05/23/2
05/16/2
04/23/2
Notes

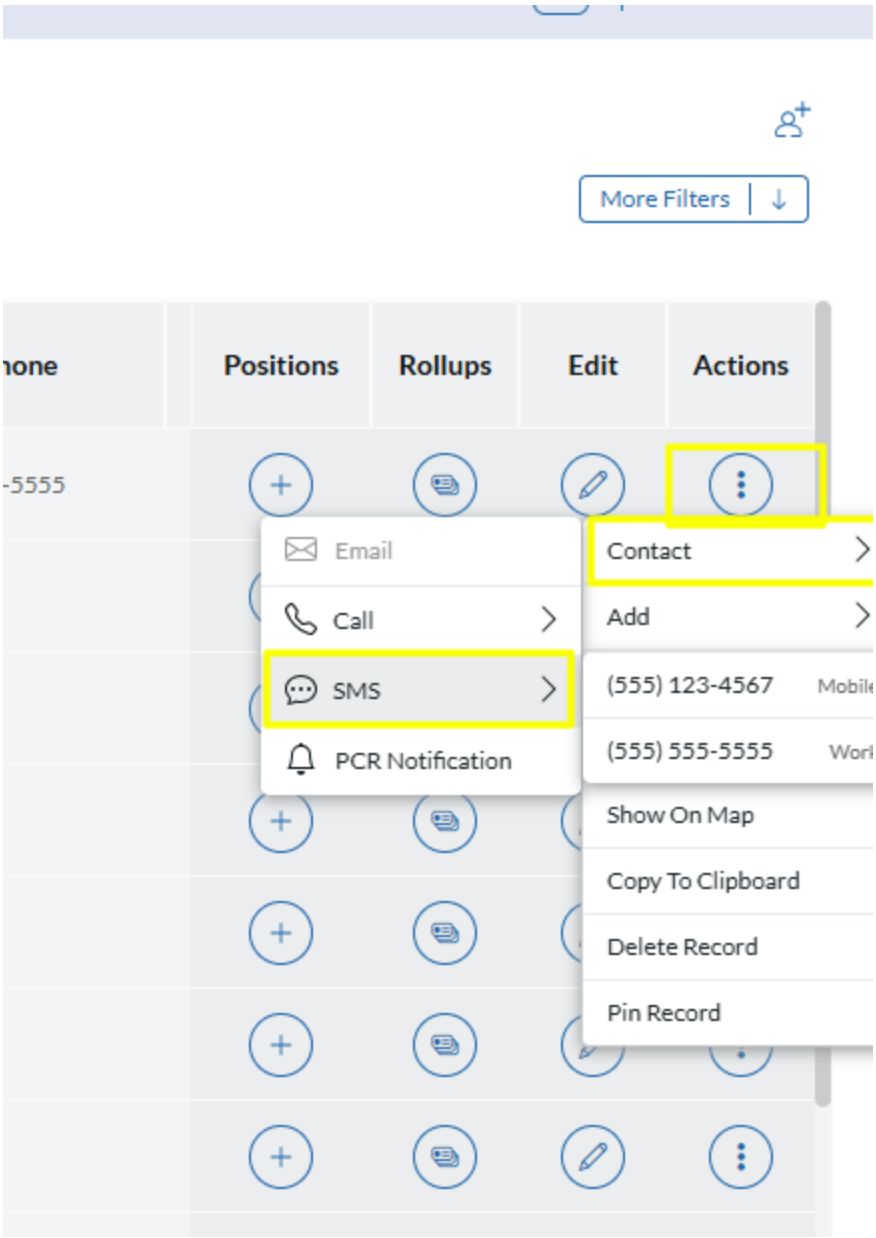


SMS

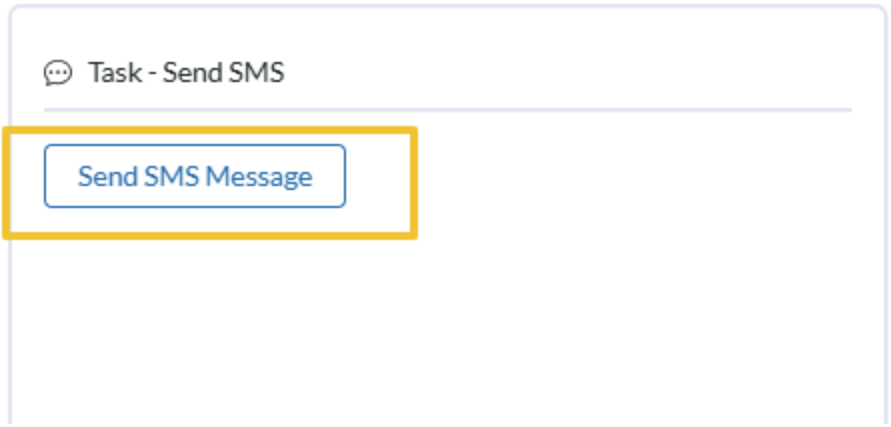
- Name/Company/Position Record
  - An SMS can be sent from the Contact icon in the top right of the record. Click the Contact icon, and select SMS.



- Record Grid / Quick Search
  - From a Quick Search, Record Search, Activity Search, or Rollup, click on the Actions icon, click Contact, and select SMS.



- Simple Or Advanced Sequencing
  - From the action pane of a Call task, click the Send SMS Message button.

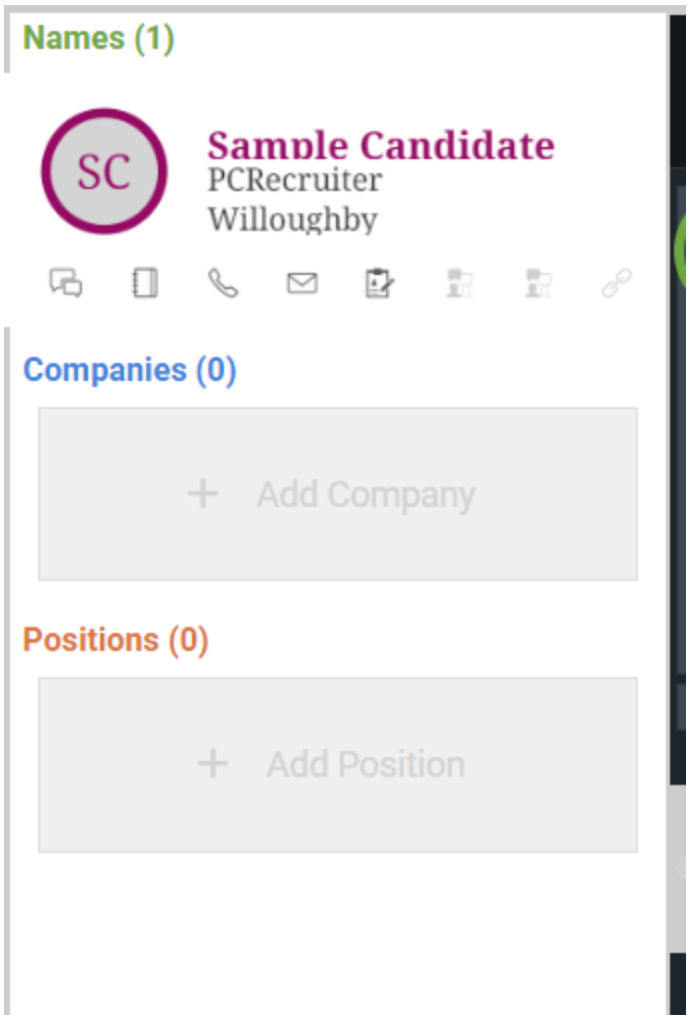


Incoming Call Notifications

A Notification will appear in the bottom right corner of your window when there is an incoming call. If multiple records matching the phone number exist, the record with the most recent activity will appear. If the phone number is found on both Names and Companies, the Company record will be favored in the pop-up.



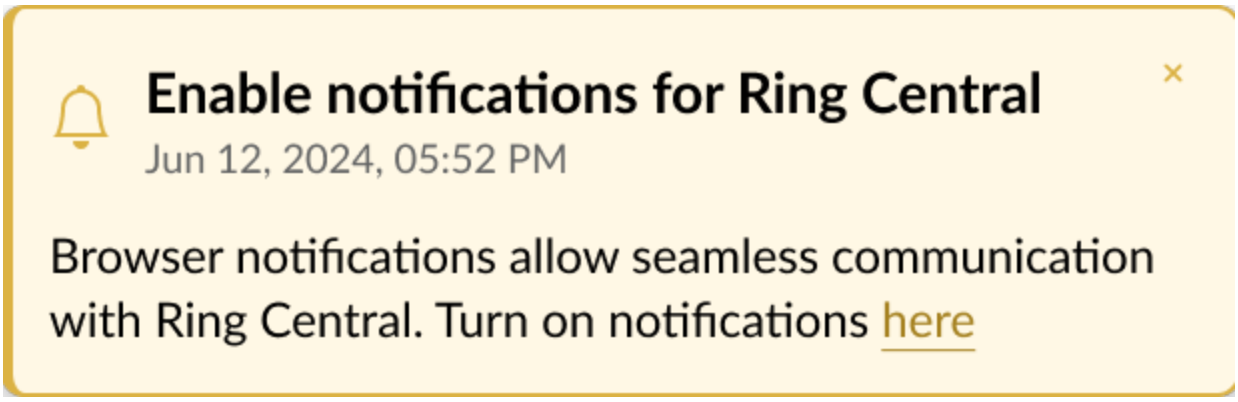
Clicking on the notification will launch a window with the matching records. The top three will be shown (in order of most recent activity) and the 'More Records' option will show additional items up to a maximum of 50 per record type. The << icon will collapse the sidebar to increase screen space if needed. If no records match, the option to add a new record will be presented.



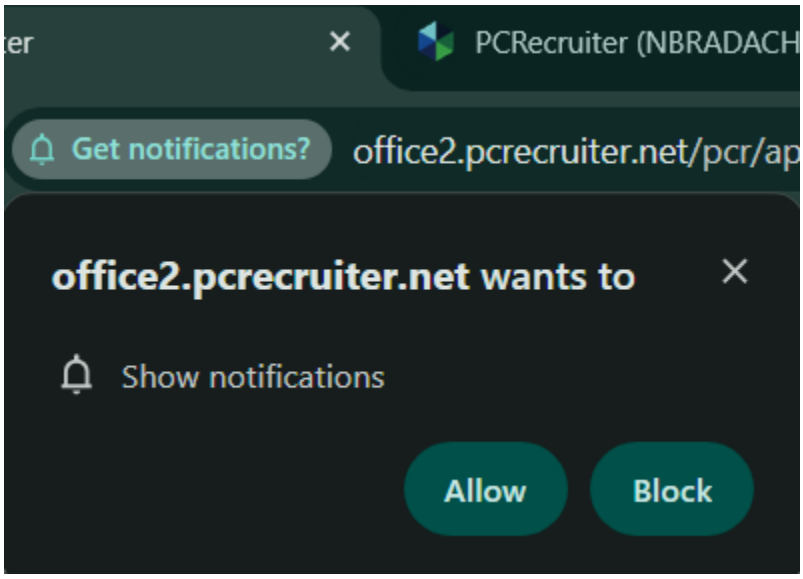
Incoming Call Notification Setup

Browser notifications in Chrome must be set to allow notifications in your settings. Click HERE for instructions on turning on browser notifications. If your settings are already turned on or you do not get the red notification below you can skip this step.

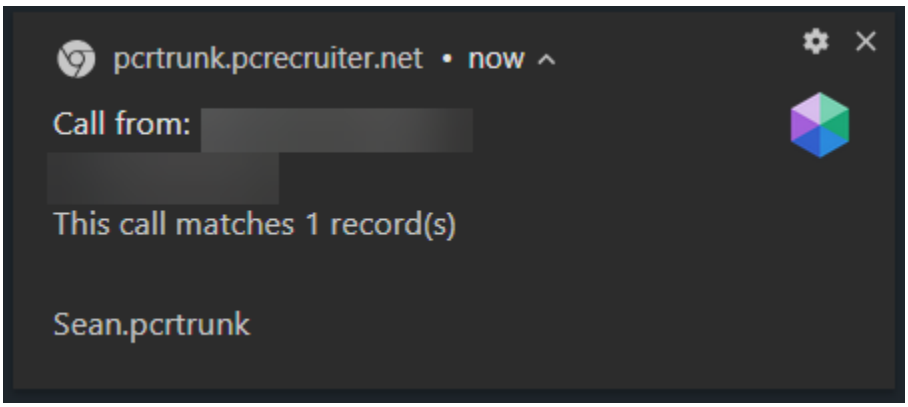
1. When logging in to a database for the first time after the update that has RingCentral enabled the user will receive a PCR notification that prompts them to enable those notifications within Chrome.



2. Click on the link in the notification to prompt the Chrome Browser to enable notifications from PCRecruiter.

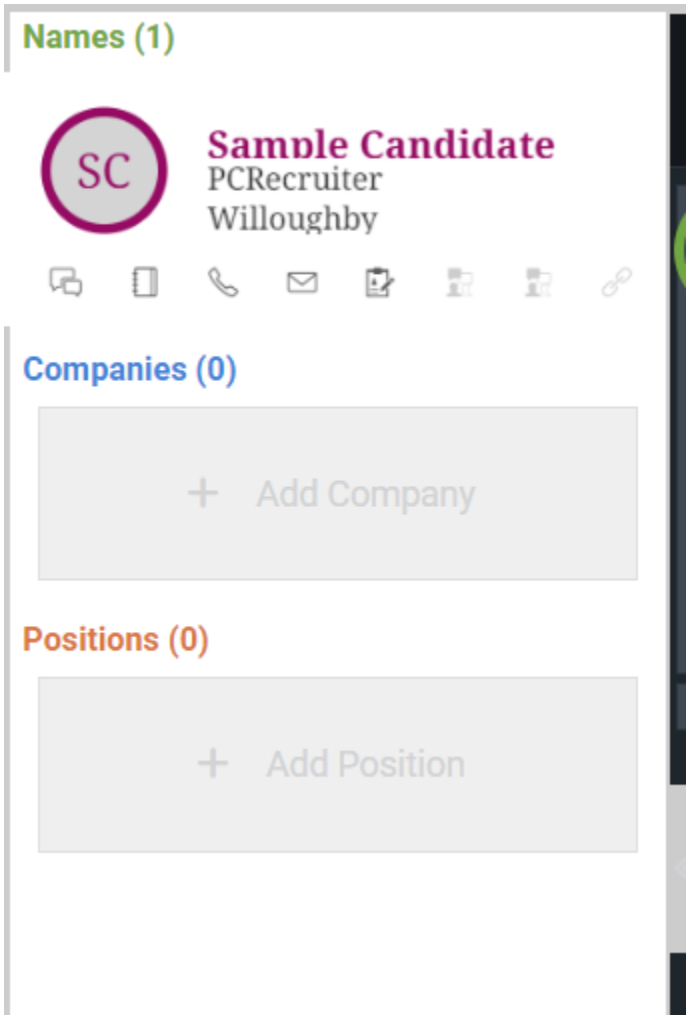


3. Click allow to enable Chrome Notifications on the PCR webpage. This will allow you to receive the CallerID pop-up notification from RingCentral when an incoming call occurs.



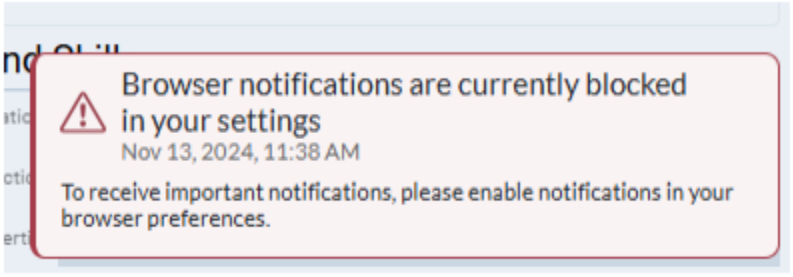
4. If you click on these notifications a PCR screen will open which displays any records with a matching phone number in your database, allowing you to quickly navigate to their record or to

add a new record with that phone number to your database.

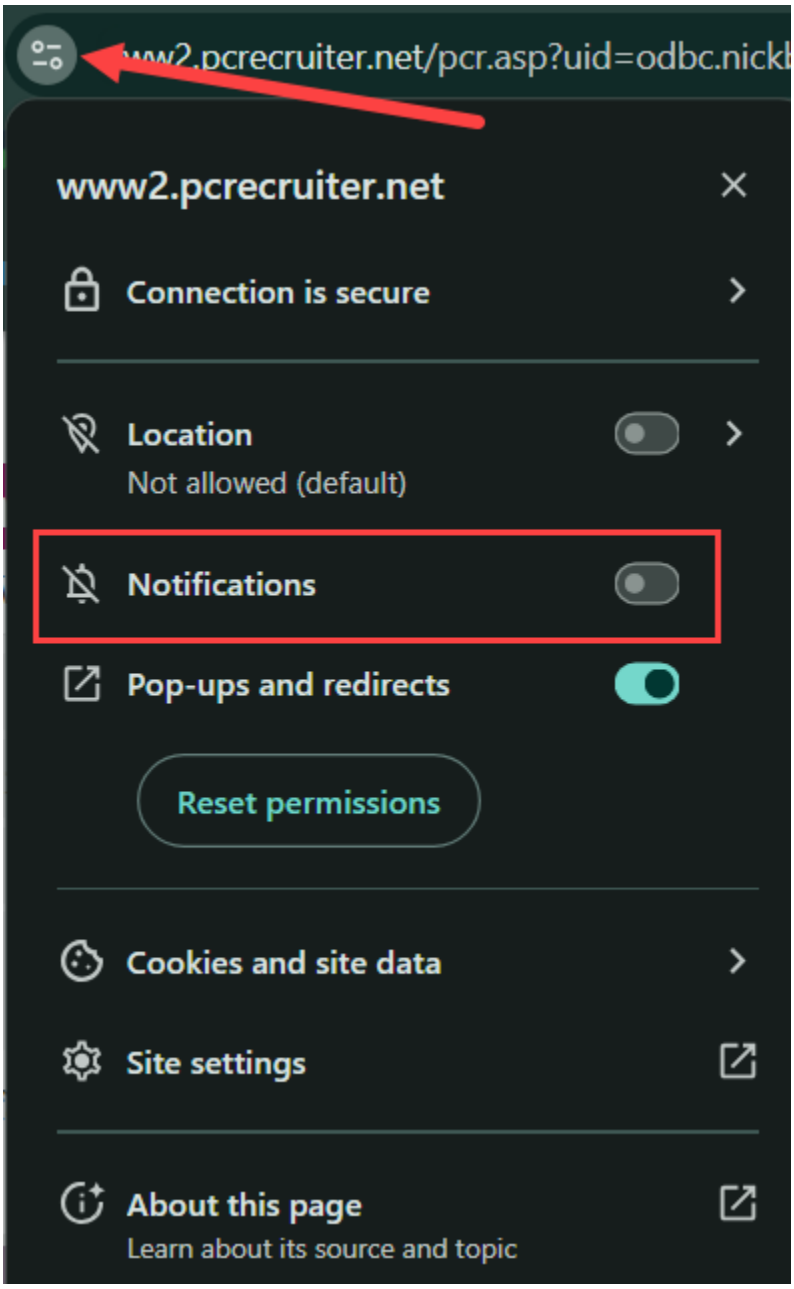


Notification Troubleshooting

- Browser notifications in Chrome must be set to allow notifications in your settings. If your settings are set to block notifications then you will see the PCR notification below. Click HERE for instructions from Google.



- If you accidentally dismiss this notification or do not see it pop up in your browser you can also click the “View Site Information” icon to the left of the URL at the top of the browser window from any PCR page and select the toggle to turn on these notifications.



- If notifications have been enabled and you are still not receiving these notifications, you may need to adjust your previous settings from your RingCentral app using the following directions.
  1. Open your RingCentral app.
  2. Click Settings.

3. Choose Phone.
4. Scroll down to the General section.
5. Disable the toggle for the ‘Launch an external app or website for incoming calls’ function.

Activities

PCRecruiter will log activities for all call and SMS communications made through your RingCentral account.

- Activity Type: INBOUND
  - Result Codes: MISSED, RECEIVED, VOICEMAIL
- Activity Type: OUTBOUND
  - Result Codes: CONNECTED, NO CONNECT
- Activity Type: SMS
  - Result Codes: INBOUND, OUTBOUND

Activities are created on a periodic sync with RingCentral's servers and may not appear in your database immediately.