

USER GUIDE

RingCentral Telephony integration with Bitrix24 Cloud

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DOWNLOAD

FEEDBACK

OVERVIEW

Now you can receive incoming and make outgoing calls from Bitrix24 via RingCentral cloud telephony service.

Configure the application and select RingCentral as the operator in Bitrix24 telephony settings. Now each outgoing call from Bitrix24 will be performed via RingCentral, and client's details from Bitrix24 CRM will be automatically displayed to a responsible manager during each incoming call.

WHAT IS NEW

Feature description

The following features were included by us into the first version of integration:

- 1) Integration settings;
- 2) Bitrix24 ClickToCall support via RingCentral;
- 3) Client's details display in Bitrix24 during incoming and outgoing calls.

Incoming calls processing

When your manager calls to a client from Bitrix24 CRM, the call automatically goes through your telephony in RingCentral. Call information is automatically registered in client's details in Bitrix24.

Display of client's details in Bitrix24 during incoming call

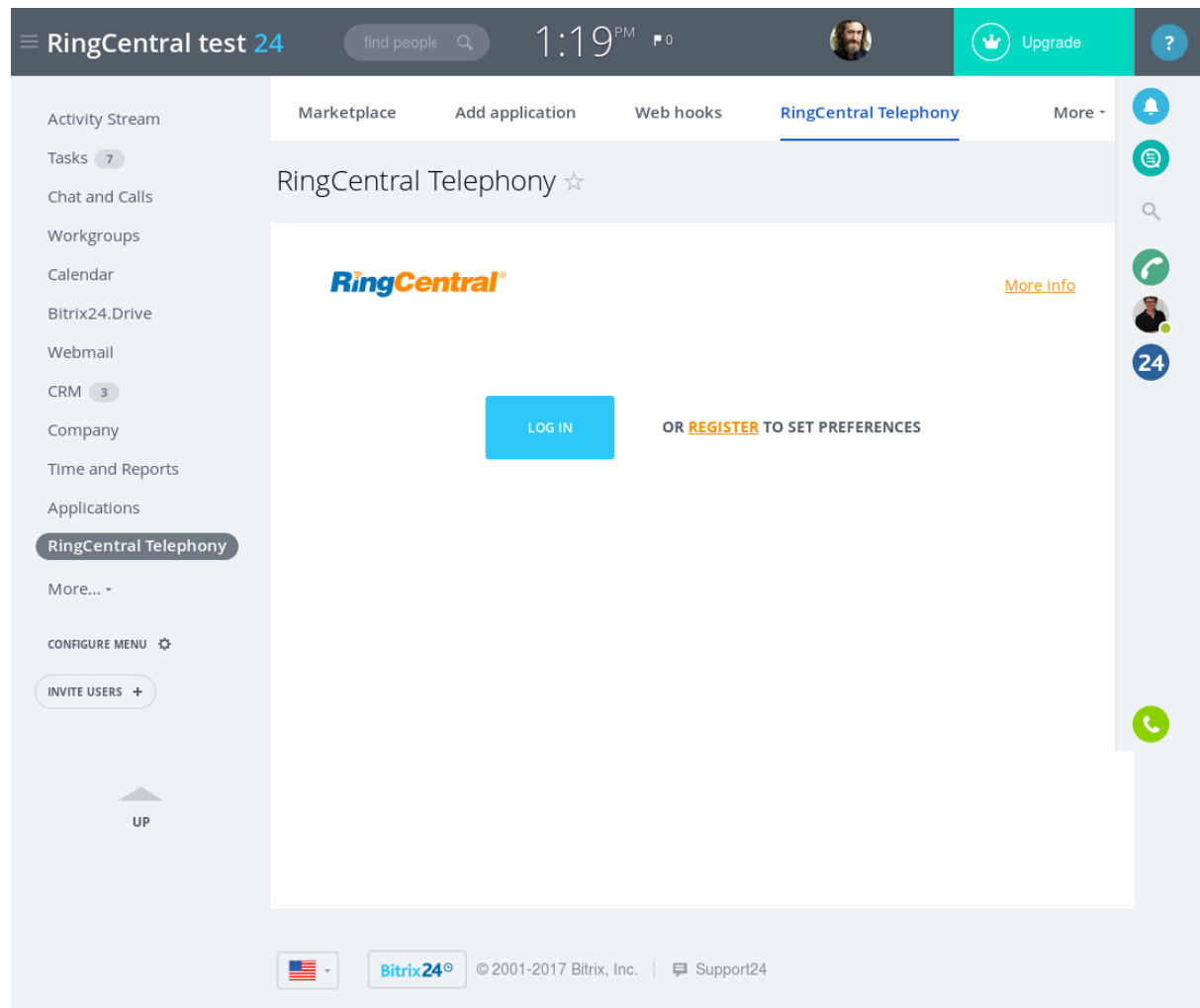
From now on, when your telephone number in RingCentral receives a call, CRM client's details will be automatically shown on the managers display. Call information is automatically registered in client's details in Bitrix24.

INTEGRATION: INSTALLATION AND SETUP

Attention! For integration to work, your subscription plan in RingCentral shall be not lower than Premium. [More on RingCentral plans and pricing](#). Unfortunately, lower plans do not sufficiently support integration with external systems yet.

Install [RingCentral integration app](#) from the application catalogue.

After the installation is complete, the app will show the window with information about RingCentral. Read the information and click «Finish», to finalize the installation.



The screenshot displays the Bitrix24 user interface. At the top, the header includes the user name 'RingCentral test 24', a search bar for 'find people', the time '1:19 PM', a notification icon with '0', a user profile picture, an 'Upgrade' button, and a help icon. The left sidebar contains a navigation menu with items like 'Activity Stream', 'Tasks 7', 'Chat and Calls', 'Workgroups', 'Calendar', 'Bitrix24.Drive', 'Webmail', 'CRM 3', 'Company', 'Time and Reports', 'Applications', 'RingCentral Telephony' (highlighted), 'More...', 'CONFIGURE MENU', and 'INVITE USERS +'. The main content area shows the 'RingCentral Telephony' app page with the RingCentral logo, a 'More info' link, a blue 'LOG IN' button, and the text 'OR REGISTER TO SET PREFERENCES'. The bottom of the page features a footer with a US flag, the Bitrix24 logo, copyright information '© 2001-2017 Bitrix, Inc.', and a 'Support24' chat icon.

For the app to start working, log into your RingCentral account. Click «Login» button. Application will forward you to RingCentral login page.



Access Request

Bitrix24 CRM v.2 is requesting access to RingCentral

- View your call log and download call recordings
- View your account and extension data
- Make RingOut calls on your behalf
- View your presence
- Subscribe to webhook notifications

Click **Authorize** to allow this app and RingCentral to use your information in accordance to terms of service and privacy policies.

After the login process is complete, confirm the required access levels to telephony account, so that integration can work correctly. Click «Authorize» button. After access rights are confirmed, the application will switch you back to the app settings page.

RingCentral test 24 find people 1:37 PM Upgrade ?

Marketplace Add application Web hooks RingCentral Telephony More

RingCentral Telephony

RingCentral® More info

Set preferences

Please, provide required information

1 Make my outbound calls through

Incoming calls

2a Automatically create a new lead if the number is not found in the CRM

2b Automatically change Bitrix24 user responsible for the lead when manually forwarding a call

2c Set responsible for an unanswered unknown call

Outgoing calls

3a Automatically create a new lead if the number is not found in the CRM

3a New lead source Call

Authorization

4 You are authorized by the RingCentral user [redacted]. To change authorization please [Log In by another user](#).

If you log off the application, you will not be able to receive calls to Bitrix24.

SAVE

Bitrix24 © 2001-2017 Bitrix, Inc. Support24

Administrator settings

If you have administrator rights for Bitrix24 portal, input the required settings:

1. Indicate the RingCentral telephone number, through which you can make outgoing calls from Bitrix24.

2. Configure settings for incoming calls:
 - a. Automatically create a new lead if the number is not found in the CRM. If this option is enabled, also indicate the source of the created lead.
 - b. Automatically change Bitrix24 user, responsible for a lead during manual forwarding a call to another manager.
 - c. Set a responsible for an unanswered unknown call from a number not registered in CRM.
3. Configure settings for outgoing calls:
 - a. Automatically create a new lead if the number is not found in CRM. Also set a source for created lead if this option is enabled.
4. To change the authorization in RingCentral:
 - a. Click «Log off» button, to exit from current account.
 - b. Login as a different user.

Remember, that until you are logged in again, the app is not going to process the calls via RingCentral.

5. Save the settings.

RingCentral test 24 find people 1:43 PM Upgrade

Connection Balance and Statistics Telephony Users Groups More

Settings ☆

Configure default numbers

Default number for outgoing calls **6**

Application: RingCentral Telephony Your counterpart will see this number when you call them using Bitrix24

SAVE

Configure call interface

Display telephone calls in Messenger:

Create separate chat for each call

SAVE

CRM Integration

Start new lead creation workflow:

When ending a call

SAVE

Auto top-up

When your balance is reaching zero, the system will debit your card you have used previously.

SAVE

Manage Black List

Auto block phone numbers outside office hours

If a call originates from the same caller ID times in a row within minutes

Off hours are specified individually for each phone number on the settings page.

SAVE

Blacklisted numbers

ADD NUMBER

A call will be rejected if the caller ID is found in the list. You will find information on this call here: ["Call Log"](#)

Activity Stream
Tasks 7
Chat and Calls
Workgroups
Calendar
Bitrix24.Drive
Webmail
CRM 3
Company
Time and Reports
Applications
RingCentral Telephony
HIDDEN
Open Channels
Telephony
Subscription
Settings
Hide - UP
CONFIGURE MENU
INVITE USERS +

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6. Go to telephony settings page and select «Application: RingCentral Telephony» as the main number for outgoing calls.

7. If you use CRM callback request form, go to its settings and select «RingCentral Telephony» application as the telephone number.

User Settings

Each Bitrix24 user that works in CRM and uses RingCentral telephony should configure individual integration settings. To accomplish this, user needs to enter into application, sign-in with his/her login in RingCentral and indicate a telephone number for RingCentral, through which the user will make outgoing calls from Bitrix24.

DOWNLOAD

RingCentral and Bitrix24 integration app can be installed from inside your Bitrix24 account or via [public marketplace](#).



FEEDBACK

If you have any questions or proposals for adding new features, please write to us at info@bitrix24.com.