PHONE INTEGRATIONS

Connect your phone. Keep the right patient in view.

An illustrated setup and everyday-use guide for **Zoom Phone and RingCentral**.

For practice administrators and authorized staff

Use your existing provider account and numbers. Learn how to connect, call, review voicemail, handle shared parent/contact numbers, prepare intake and remove access.

Zoom Phone	RingCentral
Patient calling hands off to the installed, signed-in Zoom client.	Patient calling rings an allowed callback phone first.

Screenshots are actual SoapBox staging captures with synthetic records. Relevant areas are framed for legibility; controls and record content are not recreated. Your practice, connection status and names will differ.

Support: support@slpsoapbox.com
Monday-Friday, 9am-5pm Eastern Time
First response within one business day

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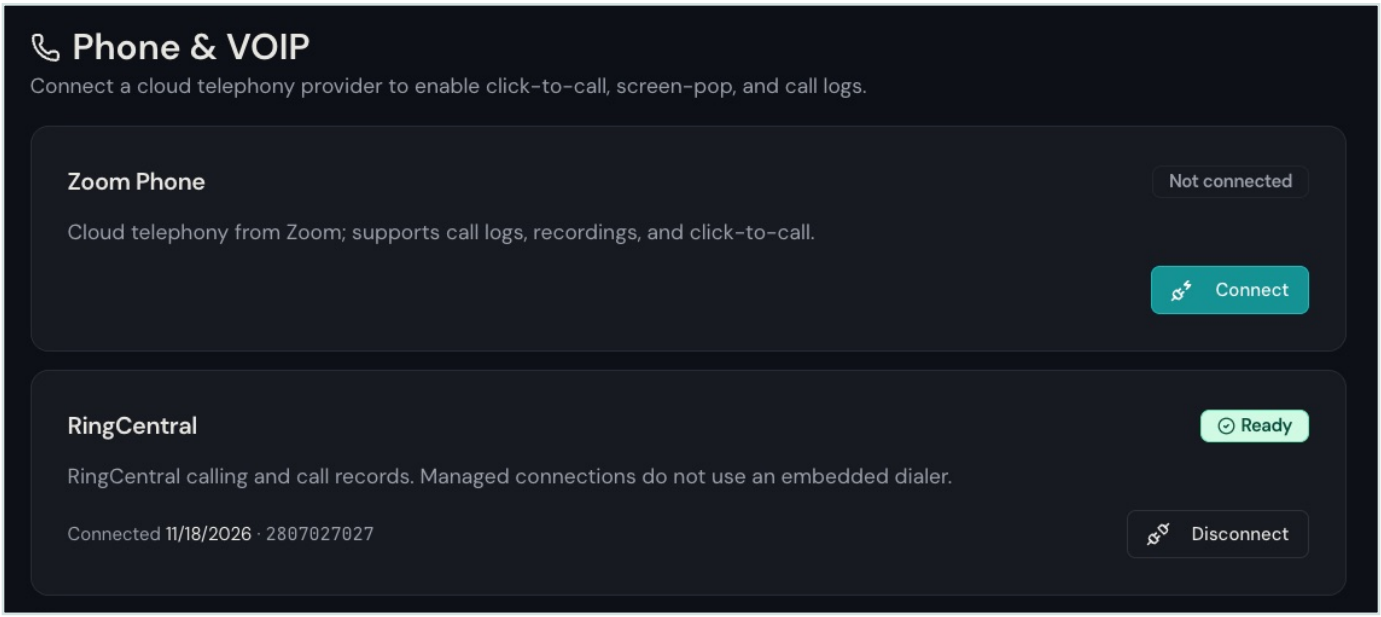
1. Connect and use Zoom Phone

Before you start

- Have a SoapBox practice administrator select the intended practice. Phone & VOIP settings and the web Call Log currently require administrator access.
- Use an existing Zoom account with Zoom Phone service and an assigned phone number. A Meetings-only account is insufficient. Your Zoom administrator may need to approve the app.
- For patient calling from SoapBox, install the official Zoom desktop client, sign in to the authorized Phone account and test the microphone and speaker. This workflow does not provide an embedded browser softphone.
- Confirm your practice's approved use, communication consent and applicable provider agreements before using patient information. Configure ringing, forwarding, business hours and voicemail in Zoom.

Add the connection

1. Sign in to SoapBox, complete any security verification and choose the correct practice. If you are new to SoapBox, the sign-in page also offers account creation; complete practice setup before connecting.
2. Open Phone & VOIP settings. If the link first asked you to sign in, select your practice and open this settings link again.
3. In the Zoom Phone card, choose **Connect**. Complete any fresh security verification in SoapBox. Allow the authorization popup for this site.
4. Sign in to the intended Zoom account. Review the requested permissions and authorize only if the account and use are correct. Do not create a developer app or paste provider secrets into SoapBox support.
5. Return to the original SoapBox tab and verify the Zoom connection status. If the popup opens SoapBox without refreshing the original tab, reload the original settings page and inspect status before trying again.
6. Configure the supported staff mappings under **Call routing**, then make approved test calls and check their records. These mappings select who receives a SoapBox notification; they do not change Zoom's call-handling rules.



Actual staging settings. This example has RingCentral selected and Zoom disconnected; use the Zoom Phone card for Zoom setup. Detail from the original capture; select the image for its complete web version.

A practice selects one voice provider at a time. Replacing it changes the voice connection. Texting connections and permissions are managed separately when available.

Make and receive calls

1. Open the intended patient chart, confirm the saved telephone number and select **Call**.
2. Review the call dialog and select **Start call**, then **Open Zoom Phone and call**. Accept the browser's request to open the installed Zoom client when appropriate.
3. Watch Zoom for dialing and the connected call. The handoff can dial automatically: do not press Call again in Zoom or SoapBox just because the app changed windows.
4. Answer incoming calls in your configured Zoom client or phone. SoapBox can show a caller card when inbound notifications are enabled and the extension is mapped to you.
5. Confirm the caller and person receiving care, then file the call to the patient or patients actually discussed. See calls, voicemail and patient matching.

Review available voicemail from the Call Log's **Voicemail** tab. Transcripts may be pending, empty or unavailable and need human review. This guide does not promise call recording, account-wide access to every staff member's calls, or a total duration across transferred call legs.

Troubleshoot or reconnect

- **Settings unavailable:** check the selected practice, administrator role and whether phone integration is enabled. Marketplace installation does not grant SoapBox access.
- **Authorization denied:** verify the Zoom account, Phone service, administrator approval and requested permissions. Read any displayed error before reconnecting.

- **No desktop handoff:** check that the Zoom client is installed and signed in to the correct Phone account, then inspect its call screen before retrying.
- **No audio:** check the operating system's input device, Zoom's selected microphone/speaker and applicable browser permissions. Run Zoom's microphone test first.
- **No caller card:** confirm the provider connection, staff mapping and Show inbound screen-pop setting. During recording, Do not disturb may queue the notification instead.
- **Needs reconnect or an uncertain result:** inspect Zoom's call history before starting another call. Use the connection's supported Connect/reconnect flow and verify the returned status. Do not create duplicate integrations.

Disconnect and remove Zoom authorization

1. In the correct practice's Phone & VOIP settings, choose **Disconnect** on Zoom Phone and read the confirmation before confirming. Verify that the practice no longer shows it as the selected connected voice provider.
2. To fully remove the app from your Zoom account, sign in to the Zoom App Marketplace, open **My Library** (or **Manage** → **Added Apps** in the older view), find **SoapBox AI - VOIP Integration**, then use its actions menu to choose **Remove** and confirm.
3. If other SoapBox connections use that Zoom authorization, review their impact before removing the app. Local voice Disconnect is not a promise that independent provider sessions or separately authorized services were removed.

Disconnecting does not delete previously imported SoapBox call records, transcripts or patient links. Existing records remain subject to your practice's access and retention policies. Data still held in Zoom is managed through Zoom. For a SoapBox data request, follow the Privacy Policy and contact support without sending patient information in ordinary email. To reconnect later, repeat the authorization flow and verify the correct practice and account.

Related Zoom resources

For Zoom's own account and phone controls, see getting started with Zoom Phone and adding and removing Marketplace apps. Those guides describe Zoom; the steps above describe SoapBox's integration.

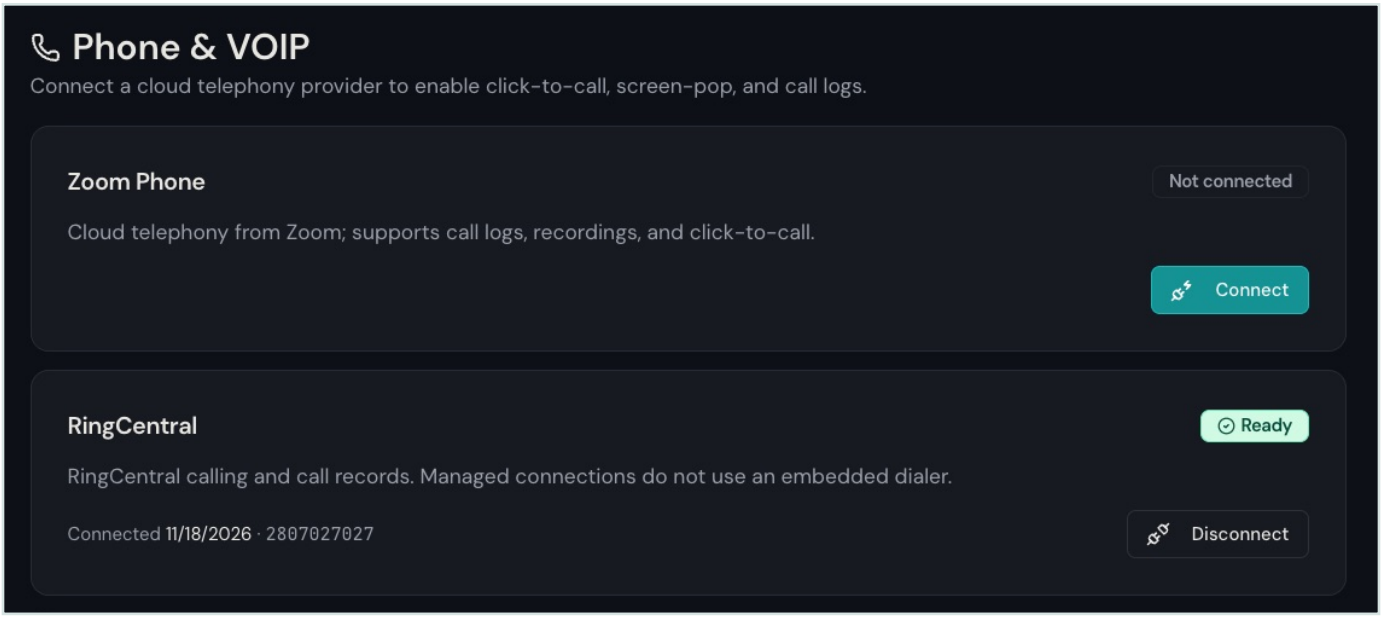
2. Connect and use RingCentral

Before you start

- A SoapBox practice administrator must choose the intended practice and have phone integration enabled. Phone & VOIP settings and the web Call Log currently require administrator access.
- Have an existing compatible RingCentral/RingEX account, an authorized user/extension and the required calling service and permissions. Your provider administrator may need to approve the integration.
- Know which phone RingCentral is allowed to ring for your extension. Sign in to that phone/client and test its microphone and speaker.
- Confirm approved patient use, communication consent and applicable agreements. Manage ringing, queues, forwarding, business hours and voicemail in RingCentral.

Add the connection

1. Sign in to SoapBox, complete security verification and choose the practice. New users can create an account from that page and complete practice setup first.
2. Open Phone & VOIP settings. If the link sent you to sign-in, choose your practice and open this settings link again.
3. Choose **Connect** in the RingCentral card. Complete any fresh SoapBox security check, allow the authorization popup and sign in to the intended RingCentral account.
4. Review and approve the permissions for the intended account. You do not need to create a developer application or provide a client secret or JWT.
5. Return to the original SoapBox tab. Wait for the connection to become **Ready**; an in-progress setup is not a completed connection. If necessary, reload the original settings page and inspect its status before repeating authorization.
6. Configure the supported **Call routing** mappings and verify incoming calls, outgoing calls and voicemail with approved test endpoints. Mapping an extension in SoapBox does not change RingCentral's own call routing.

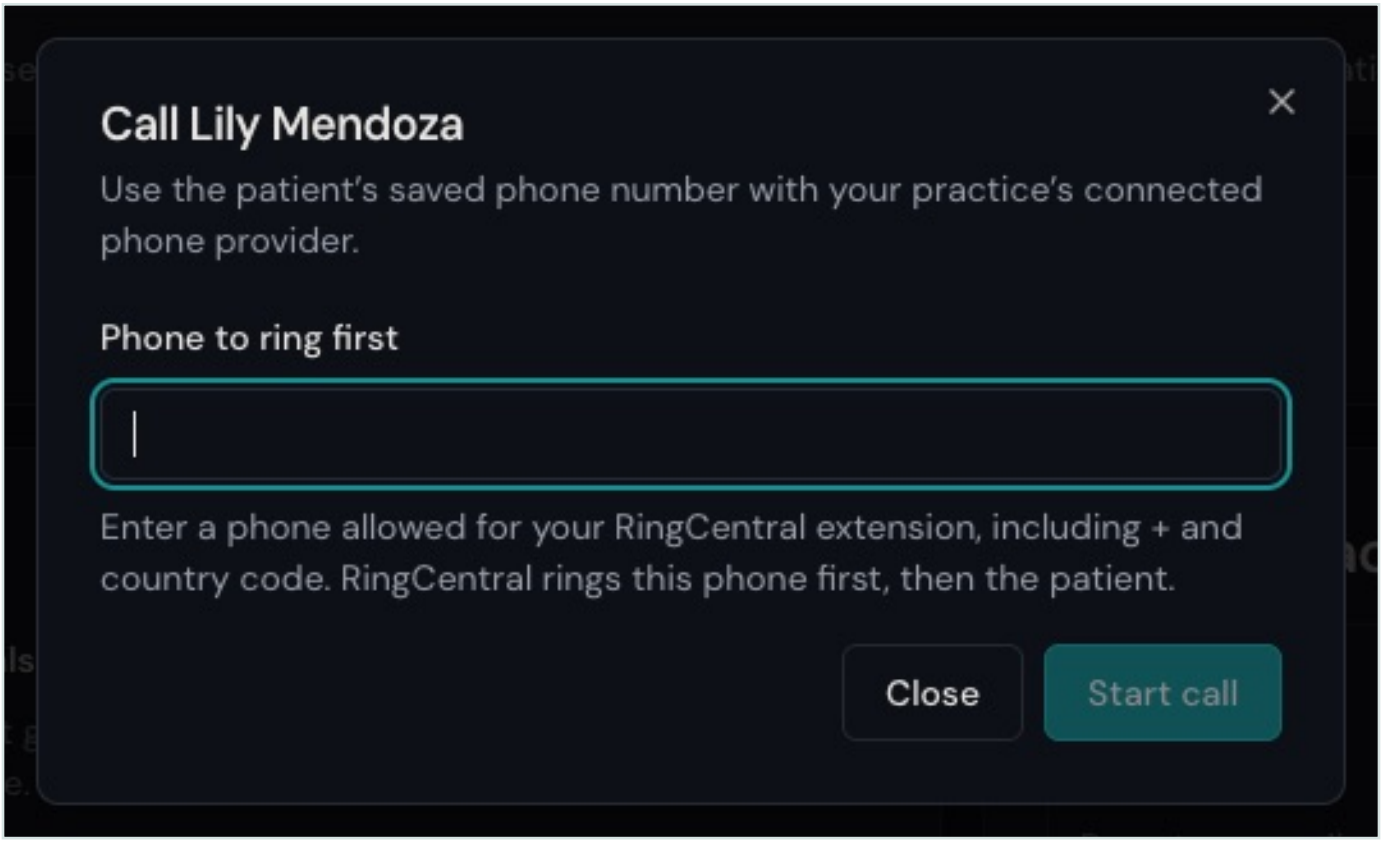


Actual staging settings with a ready RingCentral connection. Your practice and account identifier will differ. Detail from the original capture; select the image for its complete web version.

One voice provider is selected per practice. Managed RingCentral connections do not provide an embedded browser dialer. Carrier-branded services such as Office@Hand are not established as supported by this guide.

Place a patient call

1. Open the intended patient chart, verify the saved number and choose **Call**.
2. Enter **Phone to ring first**, including + and country code. It must be an endpoint allowed for your RingCentral extension.
3. Choose **Start call**. RingCentral rings your chosen phone first; answer it to continue to the patient.
4. Watch your phone/client for the call. “Call requested” confirms the request, not that the patient answered. If the result is uncertain, inspect RingCentral before trying again.



Actual staging call dialog. Opening this example did not place a call. Detail from the original capture; select the image for its complete web version.

Answer inbound calls using your configured RingCentral phone/client. SoapBox's caller card helps identify and file the conversation; it does not replace your provider's phone controls. Use the shared call and voicemail guide for parents, shared numbers and patient filing.

Troubleshoot or reconnect

- **No Ready status:** inspect the exact setup error and confirm the intended account and required permissions. If cleanup needs administrator review, contact support rather than repeatedly connecting.
- **Your phone does not ring first:** check the full callback number and whether RingCentral permits that endpoint for the extension.
- **Answered elsewhere:** inspect the other RingCentral devices before placing another call.
- **Silent microphone:** verify the operating system's input, the selected device and microphone permission in the RingCentral client/browser, then run its microphone test.
- **No caller card or missing voicemail:** verify the Ready connection, authorized extension, staff mapping and screen-pop preferences. Your provider account may not expose every user's calls or voicemail.
- **Duration is blank:** completed records can arrive later. RingCentral's duration is its call-record duration, not guaranteed pure talk time or a sum of transfer legs; some records remain unknown.

- **Needs reconnect:** use the supported Connect/reconnect action with the authorized account and verify status. Keep passwords, MFA codes and tokens out of support email.

Disconnect and remove access

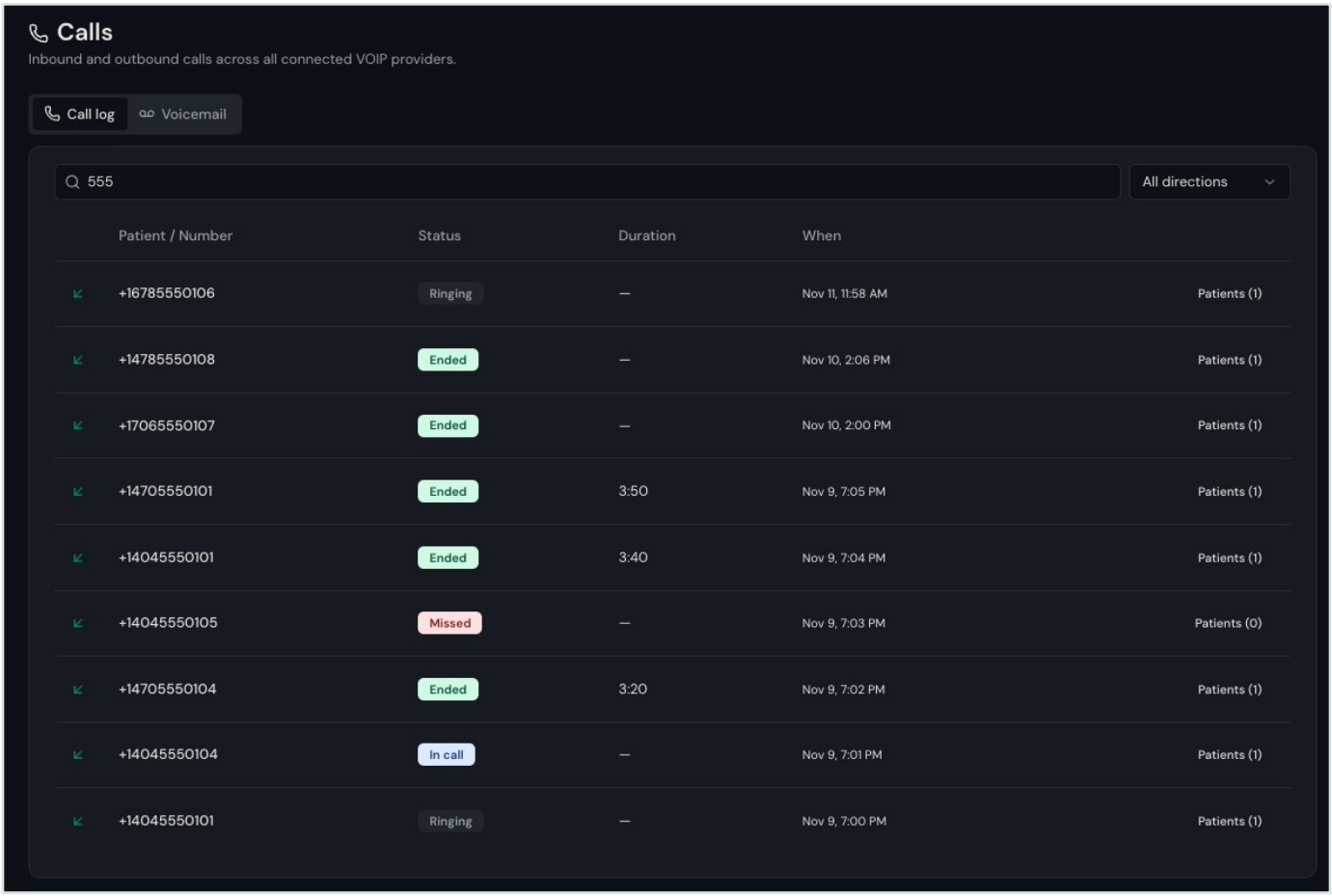
1. Choose the correct practice, open Phone & VOIP settings and choose **Disconnect** on RingCentral. Read and confirm the action, then verify the selected voice connection is removed.
2. Review any displayed provider-cleanup status. Removal from SoapBox does not itself confirm that every RingCentral resource or independent login has been removed.
3. To revoke the app's RingCentral authorization as well, use your RingCentral account's connected-app management or ask its account administrator to revoke SoapBox's access. Review any separately connected services before doing so.

Previously imported SoapBox call records, transcripts and patient links are not deleted by Disconnect; existing access and retention policies still apply. Provider-held records are managed in RingCentral. Follow the Privacy Policy for SoapBox data requests. Texting uses separate connection purposes when enabled; voice Disconnect is not a blanket cancellation of every messaging authorization.

3. Calls, voicemail and the right patients

Find the call

Practice administrators can open Call Log after signing in and selecting the practice. Choose **Call log** or **Voicemail**, search the phone number and check the direction and time. Authorized staff may receive a caller card for their mapped extension without having administrator access to this page.



Actual staging call history filtered to fictional 555 numbers. These training rows are examples, not live call activity. Detail from the original capture; select the image for its complete web version.

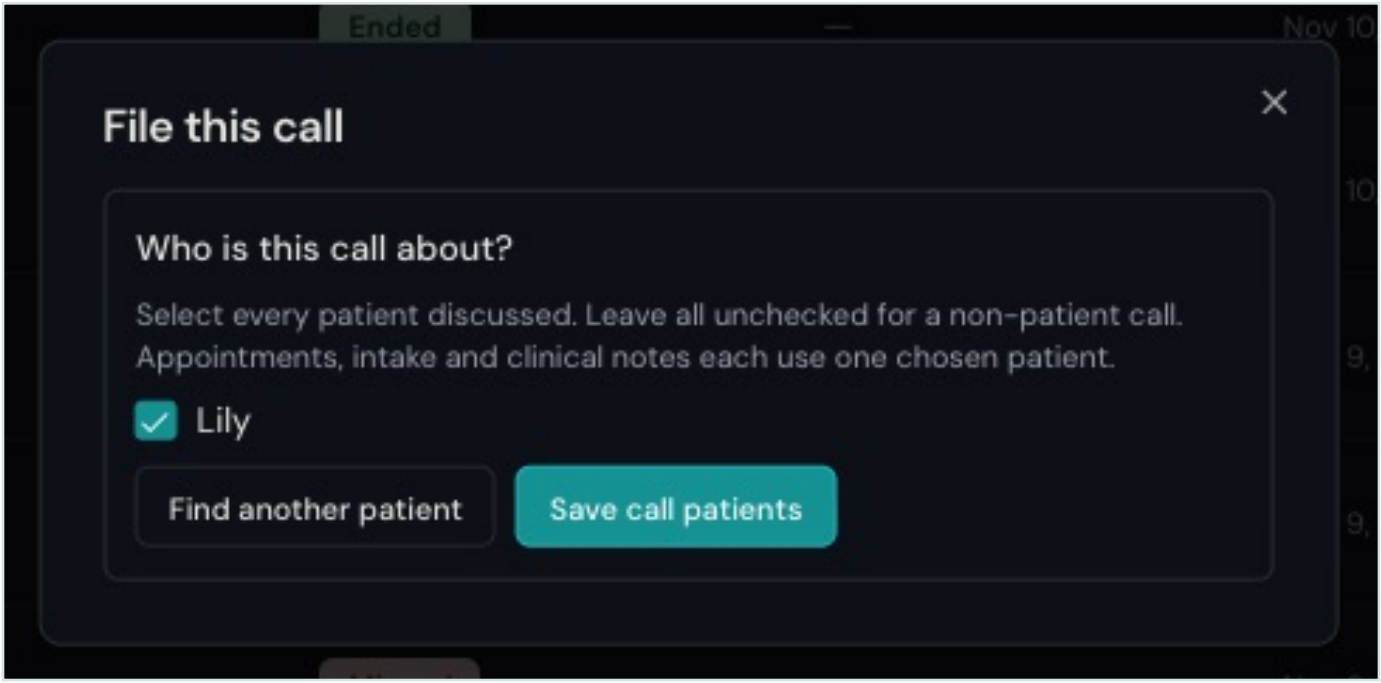
Confirm caller and patient separately

- **The patient calls from a unique number:** verify identity and the intended patient before acting. A phone match is a candidate, not proof of identity or permission.
- **A parent/contact calls about one child:** confirm the contact's identity, relationship and the intended child.
- **A contact is linked to several patients:** ask whom the call concerns. Select every patient actually discussed; never choose the first result just because it appears first.
- **Shared, duplicate, changed or withheld number:** search existing records, confirm the person and keep the call unlinked while uncertain. A different number does not establish a new patient.

- **A vendor, wrong number or other non-care caller:** leave the call without patient links. Do not create a chart just to clear the caller card.

File or correct the patients discussed

1. On a caller card, use **Patients discussed**; in Call Log or Voicemail, choose the row's **Patients** button.
2. Check each patient actually discussed. Use **Find another patient** to search existing charts; expand to the practice search when appropriate and permitted.
3. Choose **Save call patients**. Reopen the selection to verify the saved patients.
4. To correct a filing, uncheck an incorrect patient and save. Leave all unchecked for a non-patient conversation. If another staff member changed the selection first, reload and review the current selection before saving again.



Actual staging filing dialog. A parent's call can be linked to multiple patients; each checkbox must reflect the actual conversation. Detail from the original capture; select the image for its complete web version.

A call can belong to multiple patients. Each appointment, intake packet and clinical note still uses one explicitly chosen patient. A saved call link does not create a contact relationship, give portal access or authorize a disclosure.

Read call status and duration

Ringing and **In call** describe the observed provider state. **Ended**, **Missed**, **Rejected** and **Voicemail** describe the available outcome. Delayed events or separate device/transfer legs can produce later changes or more than one row. Check the provider for the live state when uncertain.

A dash in Duration means unknown, not zero. Zoom's completed direct-call duration is local talk time; RingCentral reports its call-record duration. Do not add transfer legs together or use these values as a guaranteed whole-conversation duration.

Review voicemail

1. Choose **Voicemail**, confirm the caller and time, then use the available playback control.
2. Review any transcript against the audio. Processing can be pending, failed, empty or unavailable. Do not treat a completed indicator as proof that useful speech was captured.
3. File this voicemail to its own confirmed patient or patients using its **Patients** button. The same parent may leave a later message about a different child.

Keep an ambiguous voicemail unlinked until staff confirms its subject. A matching number, nearby timestamp or related call identifier is insufficient to copy another call's patient selection. If playback is silent, test the recording device and inspect the original provider message before assuming the carrier number cannot carry audio.

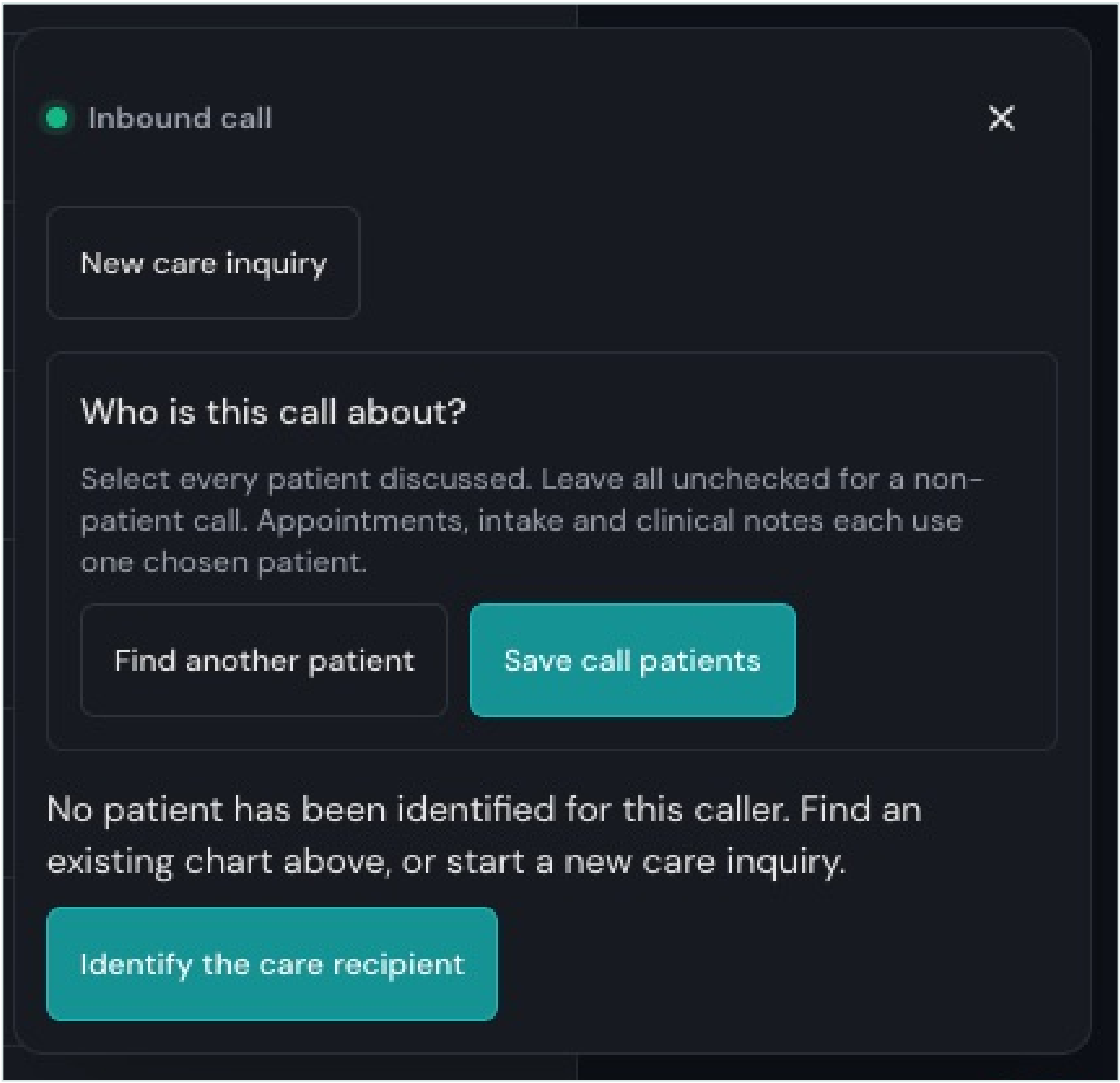
Follow up

For a new request for care, follow new care inquiries and intake. For an existing patient, confirm the recipient and patient before each follow-up action. If an action times out, check its recorded outcome before retrying. Phone connection does not automatically enable provider SMS/MMS; existing Twilio workflows and any separately configured customer texting have their own requirements.

4. New care inquiries and phone intake

Search before creating a chart

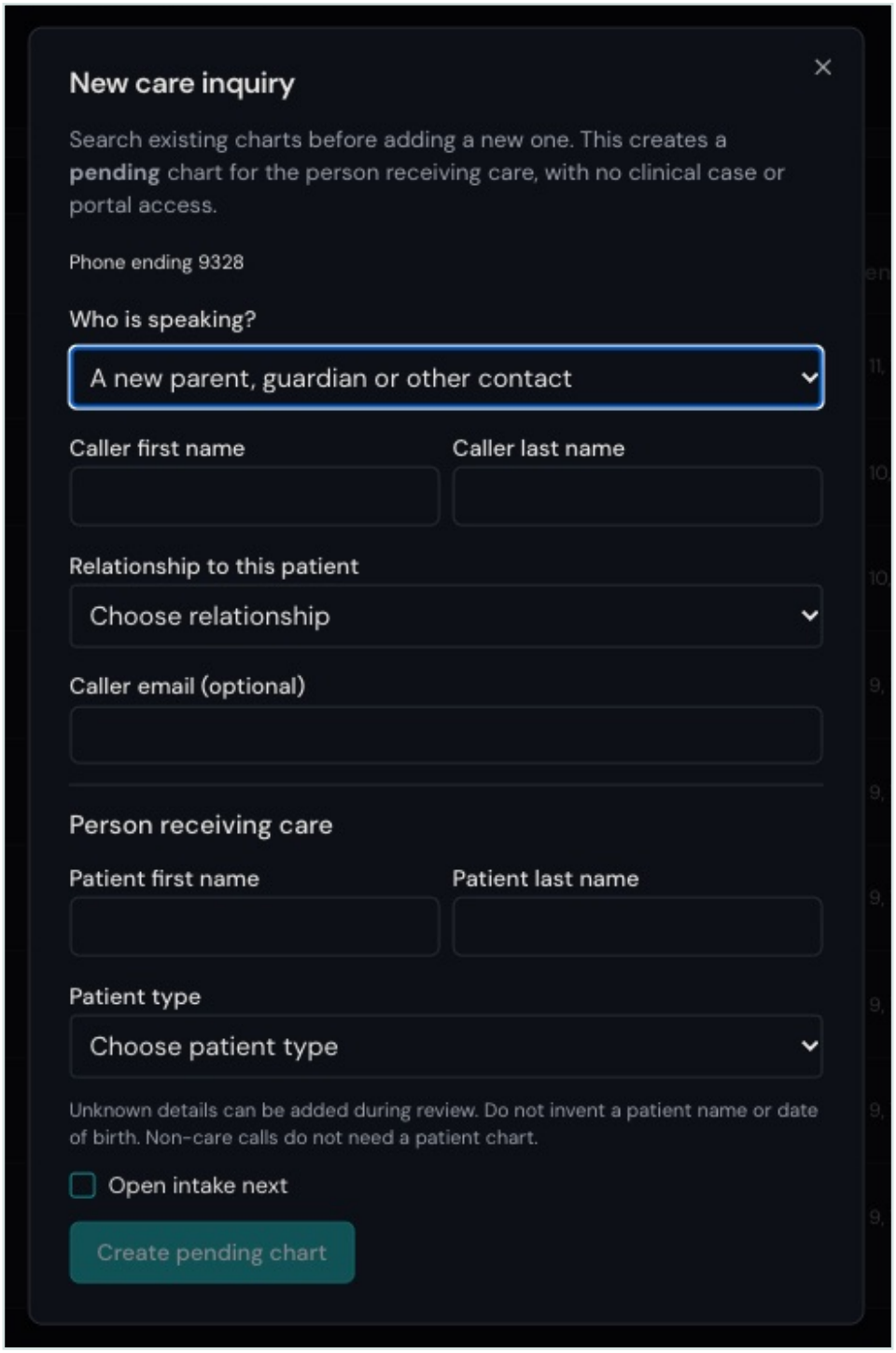
Confirm the selected practice, who is speaking and whom the call concerns. Use the caller card's **Find another patient** search first. If the patient already exists, select that chart. A new telephone number or a new parent/contact does not automatically mean a new patient.



Actual staging caller card. Use existing-chart search before starting a new care inquiry. Detail from the original capture; select the image for its complete web version.

Create a pending chart for a new care recipient

1. Choose **New care inquiry** or **Identify the care recipient** on the caller card.
2. For **Who is speaking?**, choose the person seeking care, a new parent/guardian/other contact, or identity not yet known.
3. For a parent/contact, enter the caller's name and relationship separately. Enter a caller email only when known and confirmed.
4. Under **Person receiving care**, enter the intended patient's known name and patient type. Do not invent a name or date of birth to fill a gap. If the person cannot yet be identified, pause chart creation.
5. Choose **Open intake next** if appropriate, then **Create pending chart**. Verify the created chart and patient selection before continuing.



Actual staging form with the parent/contact option selected. Caller identity and patient identity are separate. Detail from the original capture; select the image for its complete web version.

This creates a clearly marked pending patient chart. It does not create a clinical case, grant portal access, or establish new contact authority. Non-care calls do not need a patient chart.

Choose the intake patient and recipient

1. Confirm the exact patient receiving care. If a parent discussed two children, prepare and verify each child's intake separately.
2. In the intake dialog, choose the intended packet and the supported caller-specific delivery method: verified caller email or **Copy Link** for an explicitly copied blank packet.
3. Review the actual destination before sending or copying. Copying a link does not send it; deliver it only through your practice's approved channel.
4. Inspect the result and delivery history. A reserved email packet with an uncertain result must not be repeatedly resent or regenerated.
5. Review the returned submission against the intended patient before accepting chart information. Receipt of an intake is not proof of contact authority or permission to disclose clinical information.

Caller-specific pending intake does not enable SMS to pending patients or relax the normal texting consent and recipient checks. It also does not create a portal login. Follow your practice's review process before activating the chart, adding a case or establishing contact/portal permissions.

Recover without duplicates

If chart creation has an uncertain result, preserve the open inquiry and review the existing chart/result before retrying. Do not open a second inquiry solely because the first response was slow. If the call ends while you are preparing an inquiry, verify the saved patient context before continuing. Correcting a call's patient links later does not automatically undo chart creation or change an already prepared intake packet.

5. Quick reference and support

Who can do what

Practice administrators connect providers and use the web Phone & VOIP settings and Call Log. Other authorized staff may receive mapped caller cards and use the controls available to their current role. Marketplace installation does not grant SoapBox practice access.

Before you retry

Inspect the provider call state after an uncertain result. Check delivery history before resending intake. Keep the same inquiry when chart creation is uncertain. Never guess a patient from the first phone match or sum transfer legs to invent a duration.

Audio checklist

1. Confirm an operating-system input device.
2. Select the intended microphone and speaker in the provider client.
3. Grant applicable browser/native microphone permissions.
4. Run the provider microphone test.
5. Verify original voicemail audio before troubleshooting its transcript.

Contact SoapBox

support@slpsoapbox.com
Monday-Friday, 9am-5pm Eastern Time.
First response within one business day; resolution depends on the issue.

Include the provider, approximate timestamp/timezone and general error. Keep patient information, recordings, chart screenshots, passwords, PINs, MFA codes, signed links and tokens out of ordinary support email.

Current web guides and policies

SoapBox support and illustrated guides
Privacy Policy | Terms of Service

Organization follows Zoom's task-oriented support format: requirements, initial setup, specific tasks, recovery and related resources. All SoapBox instructions and screenshots are original; provider guides describe provider controls, not a promise of extra SoapBox features.