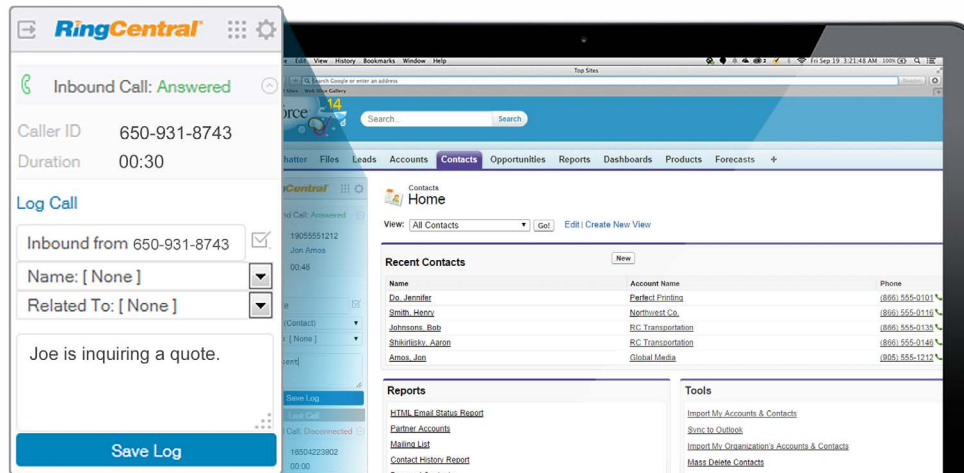


# RingCentral for Salesforce



Enhance your Salesforce experience with seamless integration between your RingCentral cloud phone system and your Salesforce CRM, improving workflow and increasing productivity.

RingCentral for Salesforce® works on Mac® and Windows® PC and now is integrated with Salesforce1 and operates with your iOS® or Android™ mobile devices.

With RingCentral for Salesforce activated, you can place calls from within Salesforce by simply clicking on contact or account records. Your incoming calls trigger a pop-up window with the caller's account information. And you can



System requirements: Salesforce Professional edition or above • Microsoft Windows • Mac OS X® • Browsers: Chrome™ 30+, Firefox® 25+, Safari® 6.0.5+, Internet Explorer® 11+

## Feature and benefits

- **Complete cloud-based app:** no software to install.
- **Access from anywhere** on both Windows and Mac using any popular browser.
- **Easy click-to-dial** from within Salesforce by clicking on any contact, saving time and improving call efficiency.
- **Instant screen pop-up** with caller's account records automatically displayed on incoming call.
- **New browser tab** for every call, enabling multiple interactions at once.
- **Real-time call logs** saved to corresponding Salesforce record with accurate call duration.
- **New records**—accounts, contacts, leads—can be easily created while on call.
- **Integrates with Salesforce1** click to dial any number in the Salesforce1 mobile app to initiate calls using your RingCentral mobile app.

# How it works

Once the RingCentral for Salesforce has been activated, it will appear inside your Salesforce account. That means you will be able to call leads and customers from within Salesforce, using the dial pad or simply clicking the contact phone icon to dial out—saving time per dial and eliminating misdials.

Your RingCentral system rings one of your devices based on your assigned routing rules, so you can answer the call while using the app.

**Contacts Home**

View: **All Contacts** Go! [Clone](#) | [Create New View](#) [Tell me more!](#) | [Help for this Page](#)

Name	Account Name	Phone
<a href="#">Joe Smith</a>	<a href="#">Rapid Transportation</a>	<a href="#">(803) 220-2751</a>
<a href="#">Inc. Lenox - Martell</a>	<a href="#">Lenox - Martell Inc.</a>	<a href="#">6174427777</a>
<a href="#">Malaquti, Sean</a>	<a href="#">New England Ski Areas Council, Inc</a>	<a href="#">16034438801</a>
<a href="#">Choroski, Erika</a>	<a href="#">TideMark</a>	<a href="#">14157941221</a>
<a href="#">Systems, Mariner</a>	<a href="#">Marsys</a>	<a href="#">16502744973</a>
<a href="#">Torres, Julie</a>	<a href="#">Young Associates</a>	<a href="#">19257718181</a>
<a href="#">Lipman, Jake</a>	<a href="#">Young Associates</a>	<a href="#">19252299191</a>
<a href="#">Rodriguez, Karina</a>	<a href="#">Young Associates</a>	

Outbound Call: Answered

Dialed No: **16505551212**  
Contact: **Joe Smith**

Log Call

Outbound to 16505551212

Joe Smith (Contact)

Related To: [None]

contract sent

Save Log

My Calls Today

RingCentral for Salesforce has intelligent call and record matching. When a call comes in, RingCentral automatically brings up the matching Salesforce contact. If the record is not available, a pop-up screen gives you the option of adding a new record.

Inbound Call: Answered

Caller ID: **14155551212**  
Duration: **00:30**

Log Call

Inbound from 14155551212

Name: [None]

Related To: [None]

Save Log

Inbound Call: On Hold

Caller ID: **15104179965**  
Contact: **Mr. Cokka Cola Jitender Kumar**  
Account: **Jk Kumar**  
[Show all &](#)

Log Call

Inbound from 15104179965

Name: [None]

Related To: [None]

Save Log

My Calls Today

RingCentral for Salesforce allows you to log notes while on calls or after the call. You can also view call reports and track accurate call duration.

A new browser tab will open for every new call you receive, enabling you to work on multiple interactions at once.