RingCentral

RingCentral for Salesforce Sales Cloud

Enhance your CRM experience, streamline workflows, and increase productivity with seamless integration between RingCentral and Salesforce.

With RingCentral for Salesforce, you can place calls from within Salesforce by simply clicking on contact or account records. Incoming calls trigger screen pops with relevant caller account information and past records. And you can attach call notes and accurately track call duration for reporting and analysis.

Has your team sent over final docs yet?

Marcos Camacho
New York, NY

Yes, this morning.

Features

- In-app calling
- High Velocity Sales (HVS)
- Click-to-call
- Instant screen pop-up
- Real-time call logs

- Schedule meetings
- Integrates with the Salesforce app
- Performance reporting
- Compatible with Windows and Mac

Benefits

Improve the quality of customer interactions

Access to key customer information and call history allows agents to deliver a timely and personalized customer experience every time.

Streamlined business communications

RingCentral for Salesforce reduces the need for agents to switch between multiple devices and applications to access key business functionalities to accomplish their daily tasks.

Work the way you want

Extend the capabilities of your phone system within the Salesforce mobile app, available in both Salesforce Classic and Lightning.
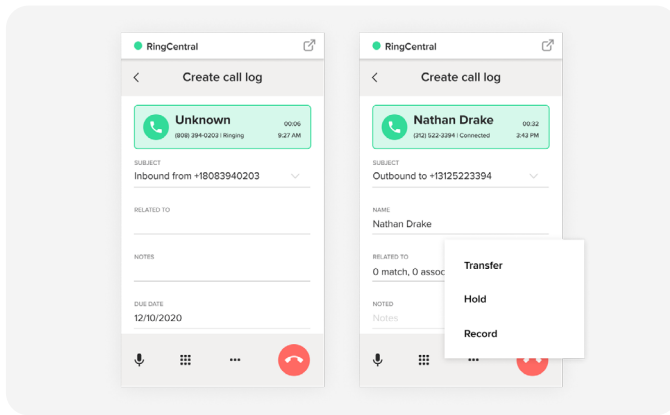
In-app calling

Now using WebRTC technology, leverage RingCentral calling capabilities like call controls and inbound and outbound calls without ever navigating away from Salesforce. Be able to switch active calls between different RingCentral endpoints.
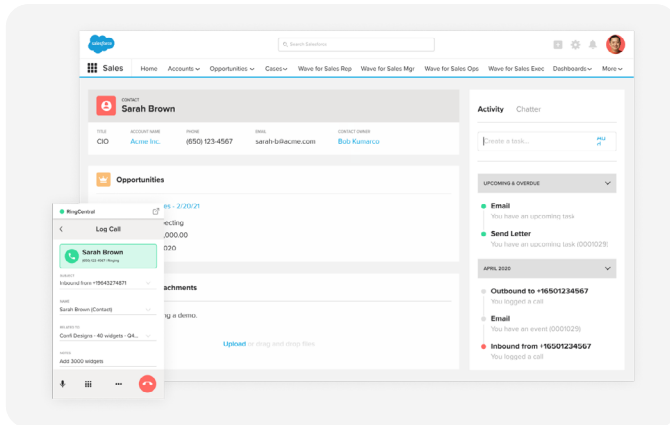
High Velocity Sales (HVS)

By powering the telephony side of a sales cadence, we allow sales reps to click to call right from their work queue and log them with a HVS disposition to move your sales cadence forward. Only available for Salesforce Lightning.
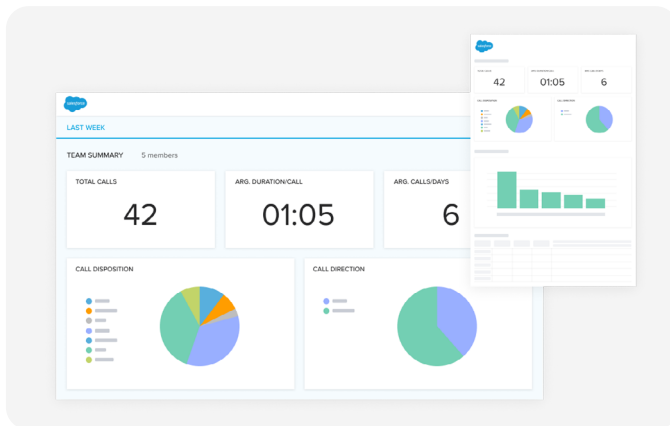
Performance reporting

View your RingCentral data within Salesforce and get actionable insights with invaluable metrics into individual and team performances. Edit and customize the RingCentral analytics data as a native Salesforce report through our Cloud Phone Report.
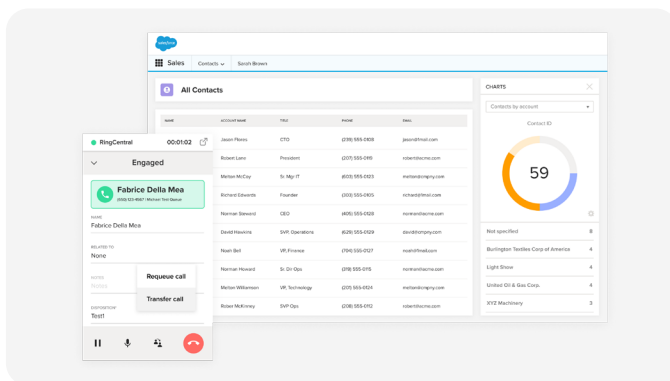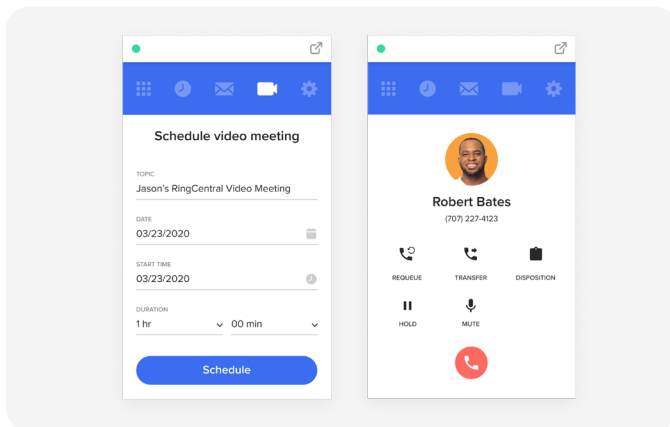
Click-to-call

Agents can remain in the Salesforce application and place outbound calls directly to customers by simply clicking the phone number from Contact, Account, Case, etc.
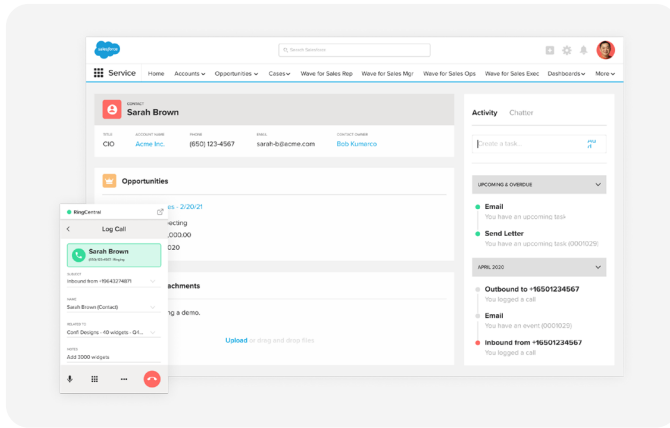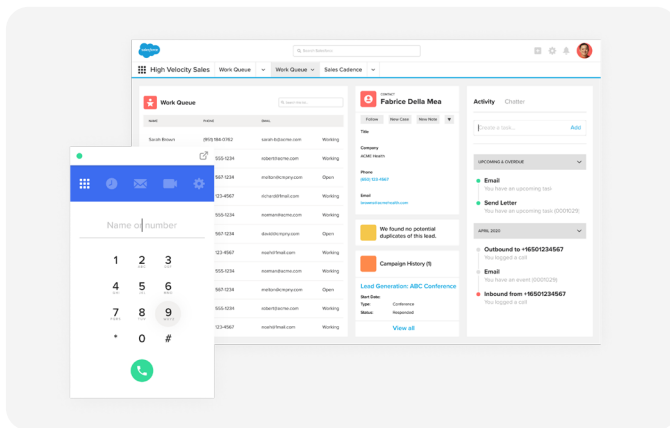
Call logging

Auto-log notes during or after your calls. Offline call logging makes it easy to log notes on missed calls.

Schedule meetings

Seamlessly schedule RingCentral Video meetings from Salesforce.

Instant screen pop-up

Incoming calls are matched with case and customer records, and a 360° view of the caller is displayed.

System requirements

- RingCentral for Salesforce is available for RingCentral MVP® Premium and Ultimate customers.

- You must have a Salesforce Professional, Enterprise, or Unlimited edition.

- Requires Windows XP or above or Mac OS X 10.8 Mountain Lion or above.

- Supported browsers include: Internet Explorer 11 + (Windows 7, 8, 10, or higher), IE Edge 38+ (Windows 7, 8, 10, or higher), Firefox 52+ (Windows, Mac), Chrome 56+ (Windows, Mac), and Safari 11+ (Mac).

How to download

RingCentral for Salesforce is available for RingCentral Office Premium and Ultimate customers and can be downloaded and installed from the App Gallery.

For more information, please contact a sales representative. Visit ringcentral.com or call 855-774-2510.