

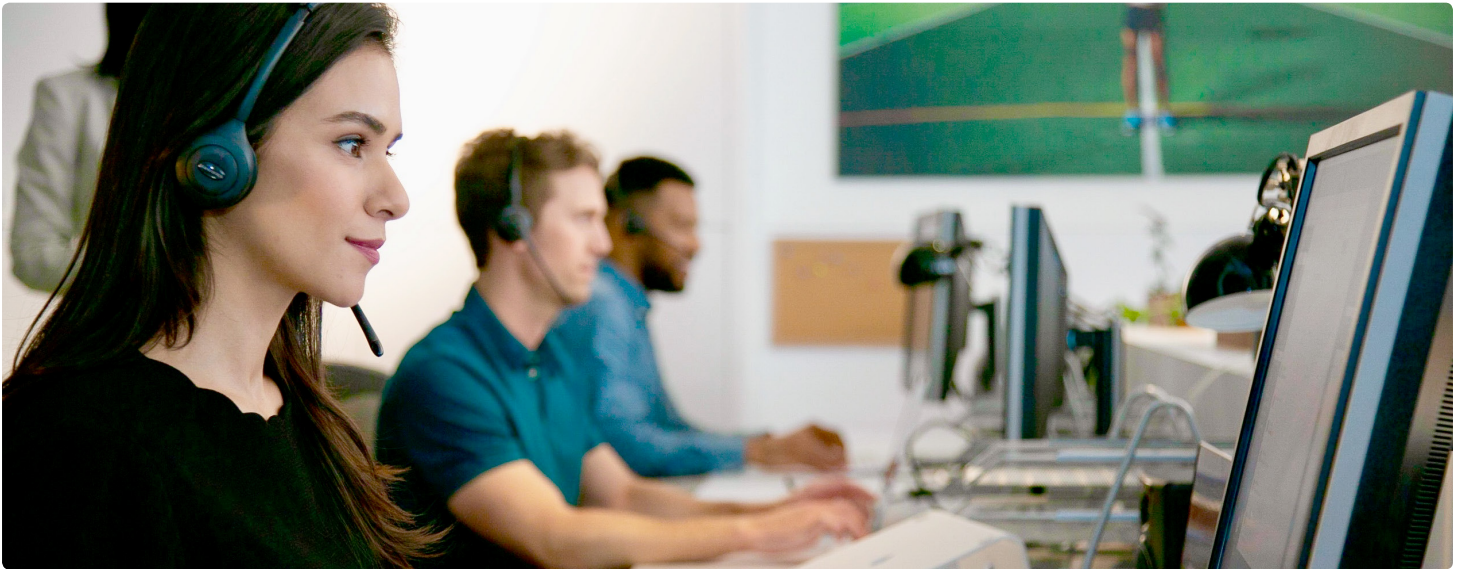
RingCentral for Salesforce® Service Cloud



available on
AppExchange

LIGHTNING READY

Streamline workflows, boost agent productivity, and empower your teams to deliver memorable customer experiences by integrating RingCentral and Salesforce Service Cloud.



With RingCentral for Salesforce, click to call to reach your customers faster and instantly match incoming calls with cases, contacts, or account records to deliver personalized, high-quality customer interactions. You can also log calls, take notes, schedule meetings, and more, without ever leaving the Service Cloud Console.

Features and benefits

Click-to-call: Make calls directly from within Salesforce by clicking on any contact, saving time and completely eliminating misdials. Integrated presence lets your team know when you're busy.

Instant screen pop: Incoming calls are matched with case and customer records and a 360° view of the caller is displayed. With access to the right information at the right time, agents are better prepared to have an insightful conversation and can effectively answer questions and escalate inquiries.

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

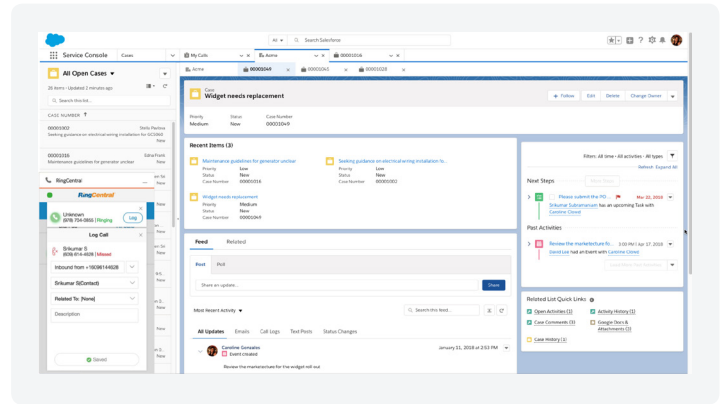
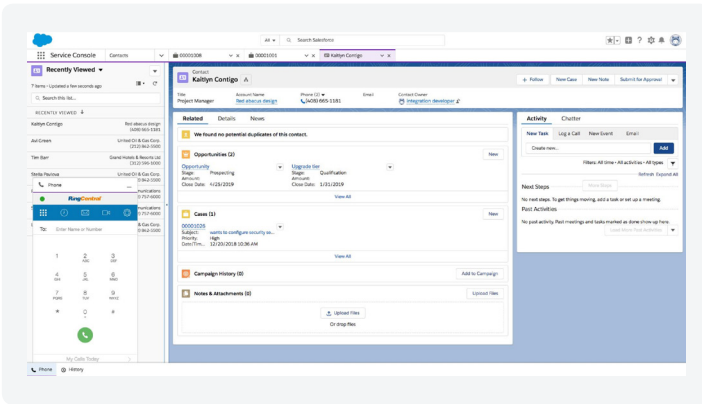
Schedule meetings: Seamlessly schedule a RingCentral meeting from within Salesforce to quickly troubleshoot a case via video conference.

Analytics: Customize your dashboard with the most relevant information for your business, and easily detect performance inconsistencies.

Access from anywhere: Connect on both Windows® and Mac®, using any popular browser

Integrates with the Salesforce app: Click to call any number in the Salesforce app to initiate a call.

How it works

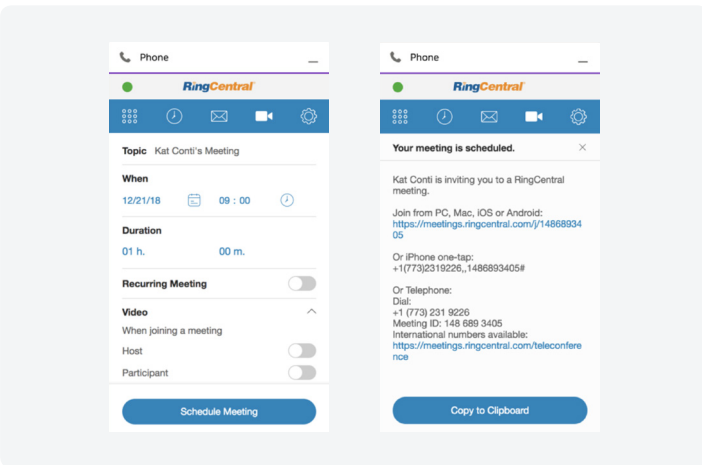


Click-to-call and caller screen pop

Click to call from any record, list view, or use the dialer and receive incoming calls with all relevant caller information displayed within a single UI. Automatically log notes, calls, and plan next steps for positive business outcomes.

Console view

Customize console settings and views for quick and effective case resolution. Toggle between cases, efficiently multitask, and address critical issues first.



Schedule a RingCentral meeting

Take quick actions in-app and be at your productive best. Quickly schedule RingCentral meetings from within Salesforce.

Analytics

Gain insights on every call. With comprehensive reports and dashboards, get a deeper view into your team's performance.

System requirements

- RingCentral for Salesforce is available for RingCentral Office® 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).