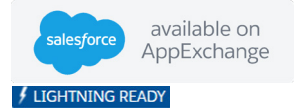# RingCentral for Salesforce

salesforce available on AppExchange

⚡ LIGHTNING READY

How much time do you spend switching from one application to another? Is it an effort to communicate with customers? Imagine simplifying your workflows, automating tasks, and transforming the customer experience. Now you can with RingCentral's best-of-breed capabilities integrated into Salesforce Sales Cloud, Service Cloud, or Desk.com.

## Features and benefits

- **Click-to-call**: Make calls or SMS directly from within the Salesforce UI, saving time and eliminating misdials. Optimized call management tools and powerful search ensures efficient customer interaction.

- **Schedule meetings**: Seamlessly schedule a RingCentral meeting from within your Salesforce account.

- **Instant screen pop**: Be equipped for insightful interactions with a 360-degree view of an incoming caller's details and records.

- **Call and text**: RingCentral for Salesforce app integration supports calling and texting right from the Account, Contact, or Lead tab.

- **Real-time call logs**: Autolog notes to ensure capture of customer context and history. Accelerate case resolution with advanced features including offline call logging and multi-call option.

- **Gain insights**: Apply call analytics insights for continuous improvement across teams. Build flexible reports and dashboards.

- **Work the way you want**: Work in the Salesforce Classic or Salesforce Lightning UI.

## How it works

### RingCentral for Salesforce: Sales Cloud
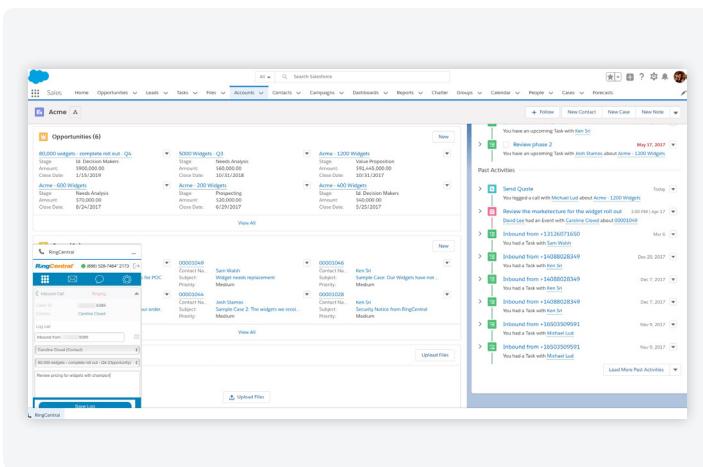




**Customer preparation**
Customers have high expectations and expect a productive call when speaking with vendors. A screen pop enables sales to speak knowledgeably about the customer's account to drive satisfaction and build long-term loyalty.

**Continuous improvement**
Every sales call provides an opportunity to observe your team and improve their customer interaction. Build flexible reports and dashboards of your team's total calls/texts, duration/amount of calls, and call dispositions.

**RingCentral®**

## RingCentral for Salesforce: Service Cloud
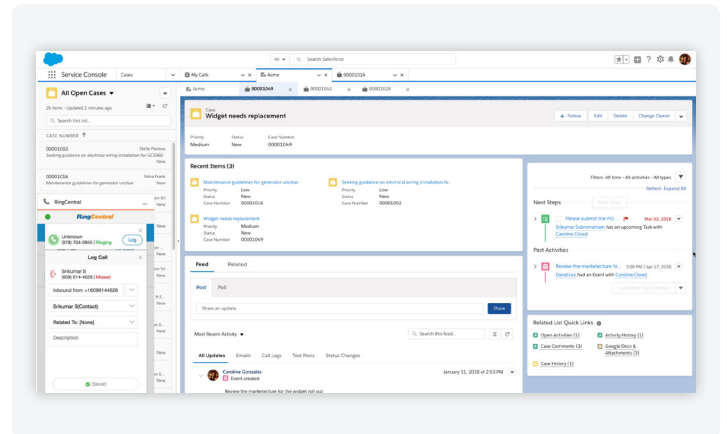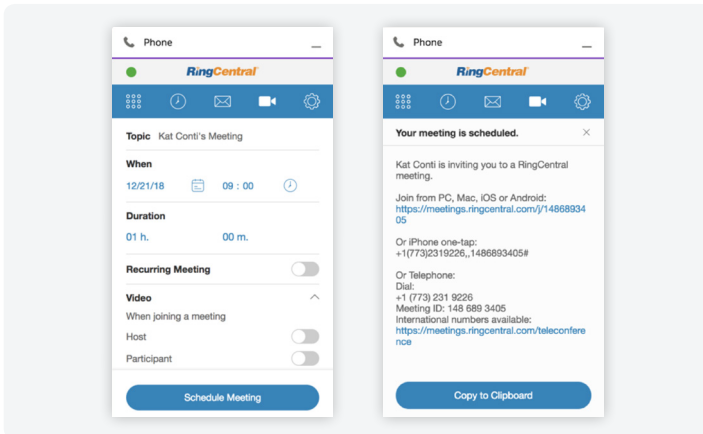


### Accelerated customer engagement and resolution

Take quick actions in-app to communicate with customers or quickly schedule RingCentral audio meetings and video conferences from within Salesforce. Agents spend less time on communications logistics and more time focused on customer interaction.

### Optimized view

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

## System requirements

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

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

- RingCentral for Desk.com is available.

- 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).

For more information, please contact RingCentral Partner Support at **partners@ringcentral.com** or **800-595-8110**.

RingCentral, Inc. (NYSE: RNG) is a leading provider of global enterprise cloud communications, collaboration, and contact center solutions. More flexible and cost-effective than legacy on-premises systems, the RingCentral platform empowers employees to work better together from any location, on any device, and via any mode to serve customers, improving business efficiency and customer satisfaction. That is the promise of Work as One™. The company provides unified voice, video meetings, team messaging, digital customer engagement, and integrated contact center solutions for enterprises globally. RingCentral's open platform integrates with leading business apps and enables customers to easily customize business workflows. RingCentral is headquartered in Belmont, California, and has offices around the world.

**RingCentral®**

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