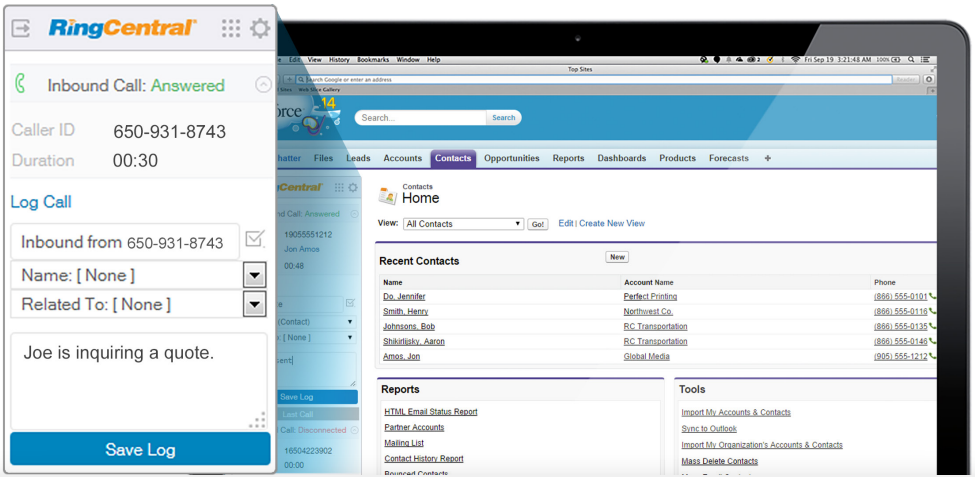
RingCentral for Salesforce



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 attach call notes and accurately track call duration on specific contact records.

salesforce available on AppExchange

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

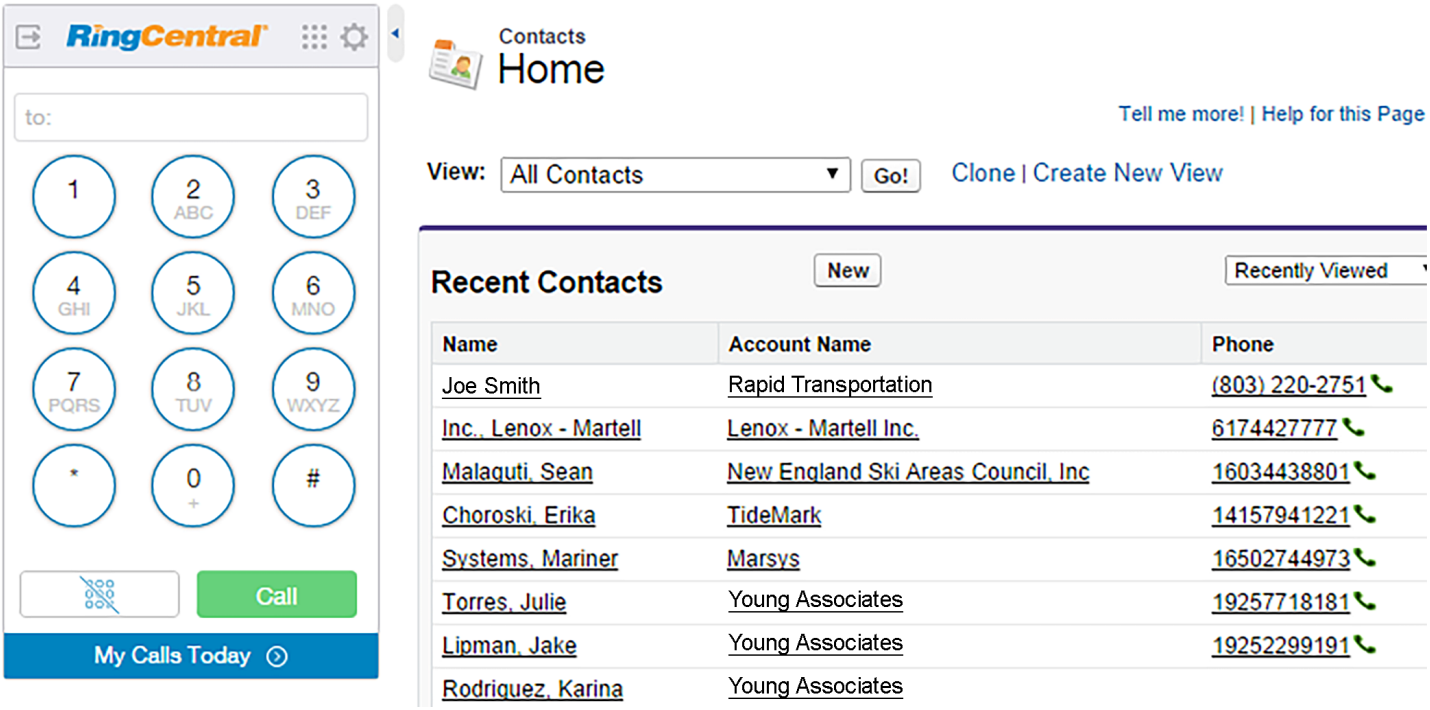
Feature and benefits

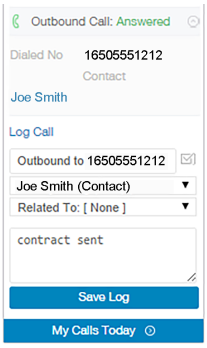
- **Complete cloud-based app:** no software to install.
- **Access from anywhere** on both Windows and Mac using any popular browser.
- **Easy click-to-dial** from within Salesforce by clicking on any contact, saving time and improving call efficiency.
- **Instant screen pop-up** with caller's account 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 a 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

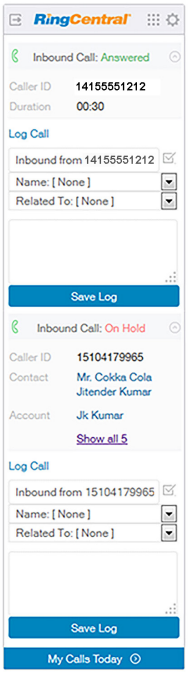
Once RingCentral for Salesforce has been activated, it will appear inside your Salesforce account. That means you will be able to call leads and customers from within Salesforce, using the dial pad or simply clicking the contact phone icon to dial out—saving time per dial and eliminating misdials.

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





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.



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.

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