



# RingCentral for Salesforce

05/20/2025

# What will be covered in this training?



**Part 1: Downloading RingCentral and Connecting to Salesforce**



**Part 2: Making and Receiving Calls in Salesforce**



**Part 3: Recording Your Call Notes**

## This training will help you answer the following questions:

- Download the RingCentral App
- Log into the RingCentral App from Salesforce
- Make and Receive RingCentral Calls – Click-to-Call
- Create and Save Salesforce Call Activities



# Part 1: Installing and Connecting Ring Central to Salesforce

# RingCentral VOIP (voice over internet provider)



- RingCentral is a digital phone service that can be used with a physical phone or a computer application
- Because RingCentral can be used with your computer, you can access call features and functionality from your laptop, and in software applications such as Salesforce
- Connecting a phone service like RingCentral to Salesforce will increase productivity using native Salesforce features such as:
  - Click-to-Call – tracking inbound and outbound calls
  - In application dial pad
  - Tracks caller name and number
  - Quick start Activity tracking
  - Call History log



# Downloading RingCentral

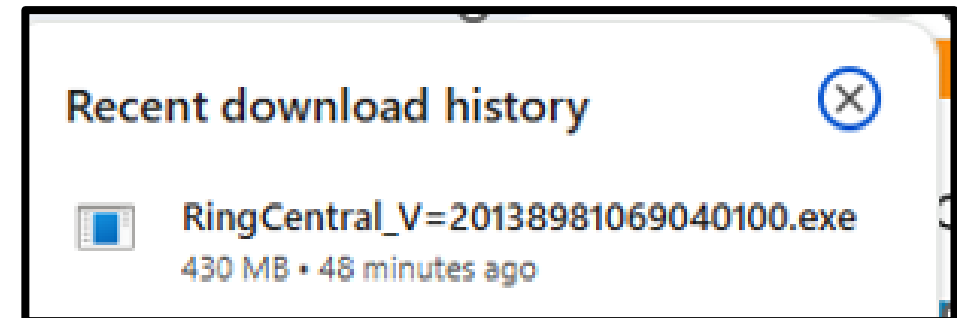


- To get started, you will need to download the Ring Central App to your desktop or laptop using this link: <https://www.ringcentral.com/download.html>
- Use the Download for Windows link
- Open your Recent download history in your browser window and run the RingCentral.exe file
- Once RingCentral has finished installing, you will be prompted to enter your phone number, create a password, and to complete additional set-up step.

**RingCentral**

Download for Mac

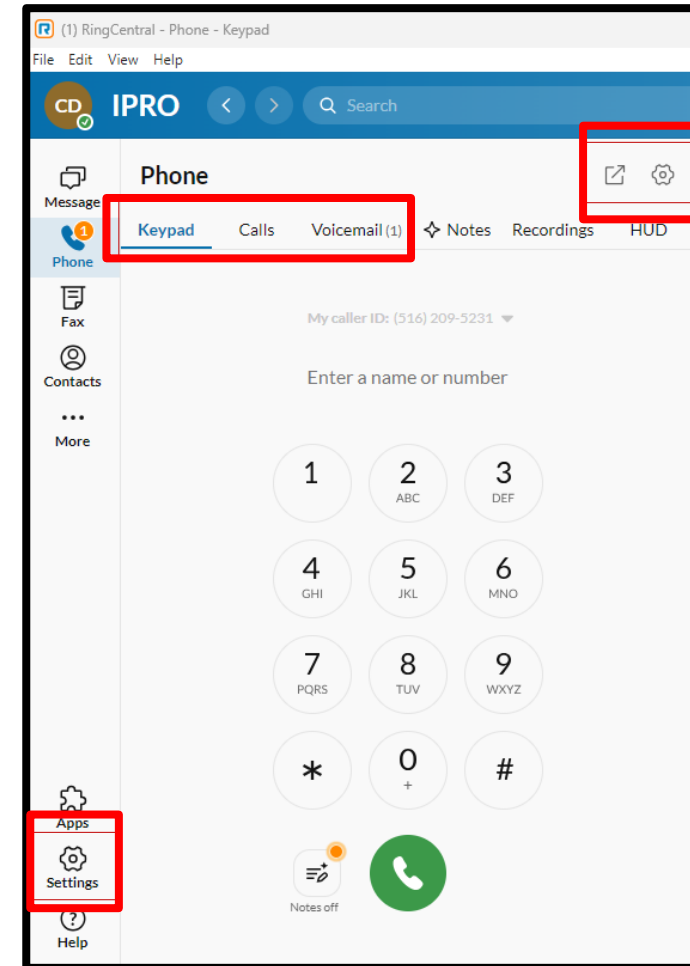
Download for Windows



# Using the RingCentral App



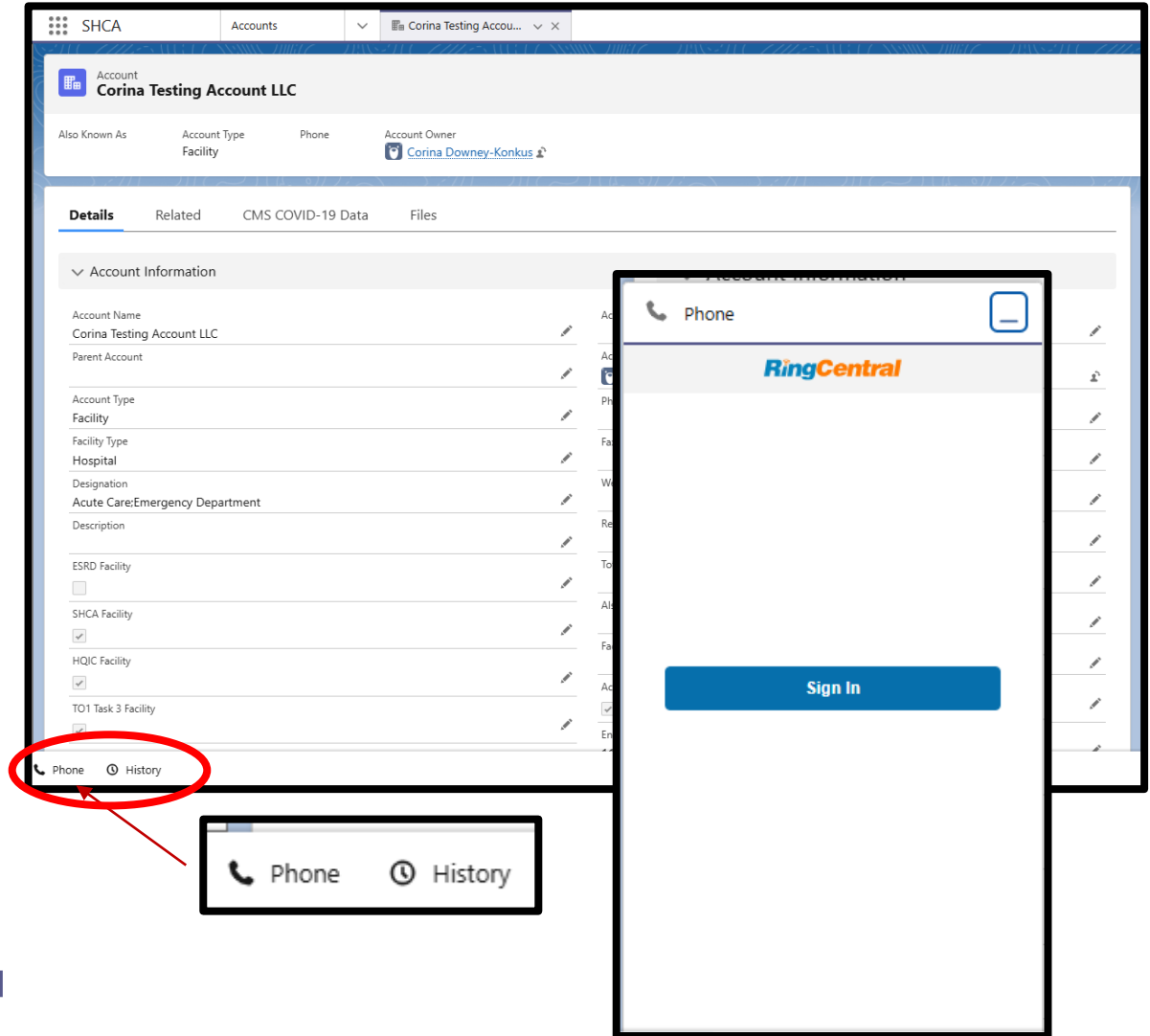
- Once you have downloaded the RingCentral App, you will be able to use it to make or receive phone calls, both via the app or by connecting to Salesforce.
- The main screen of the app will have a dial pad. From this screen you can make phone calls, check voicemail, and see your call history.
- The gear setting in the upper right of the dial pad or in the lower left corner will open Settings. Here you can record your voicemail greeting and set up a pin to retrieve your voicemail.



# Connecting RingCentral in Salesforce



- Your Salesforce System Administrator will have already connected your Ring Central phone number to your Salesforce Account
- Log into Salesforce and go to your department Application. You will see a little phone icon in the lower left corner of the page
- Click the icon to bring up the RingCentral login page and Sign In



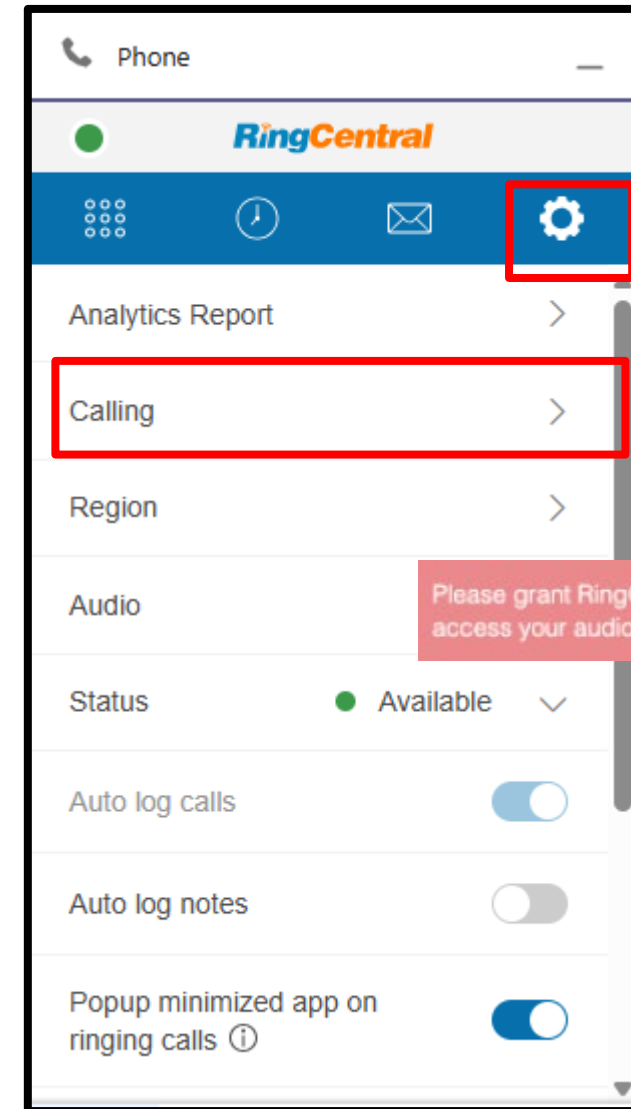
**Tip:** Even if you have signed into the RingCentral app on your computer, you will still need to sign in via Salesforce

# Connecting RingCentral in Salesforce



The first time you connect Salesforce and RingCentral, verify the following settings

- Go to the settings sprocket in the RingCentral window
- Open Calling and confirm that it is set to “make my calls with Browser”
- Then go to Audio and ensure that your Speakers and Microphone are selected. If your browser automatically blocks audio permissions, you will be asked to “Allow audio”
- You will also want to turn on “Popup minimized app on ringing calls”

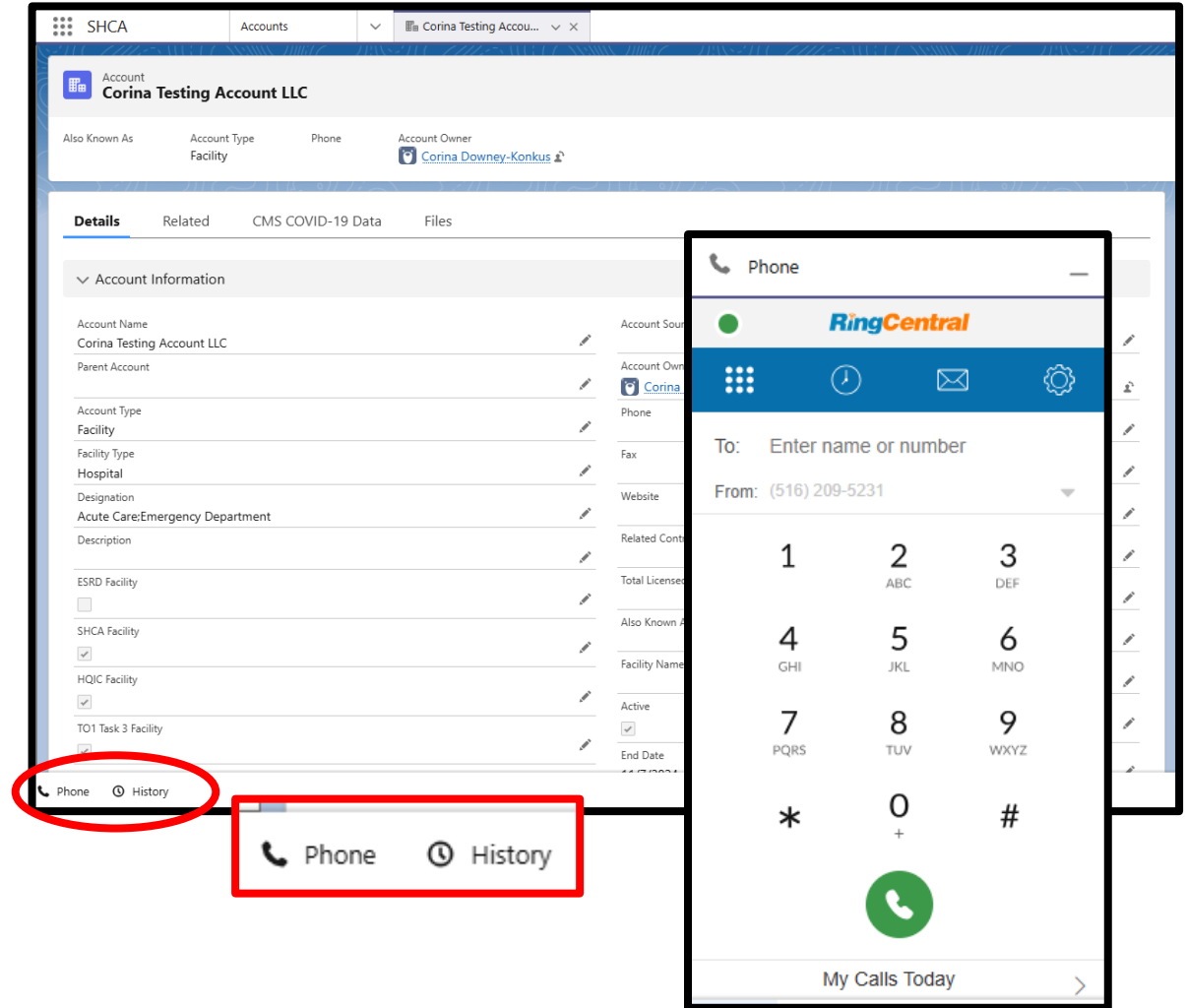


# **Part 2: Making and Receiving Calls Through Salesforce**

# Ring Central Dialpad in Salesforce



- Once you have logged into RingCentral from inside Salesforce, you will be presented with the dial pad. You can minimize the pad so that it is not present when you are doing your work
- The dial pad will pop up when you receive a call, or you can bring it back up into the window by using the phone button at the bottom of the screen

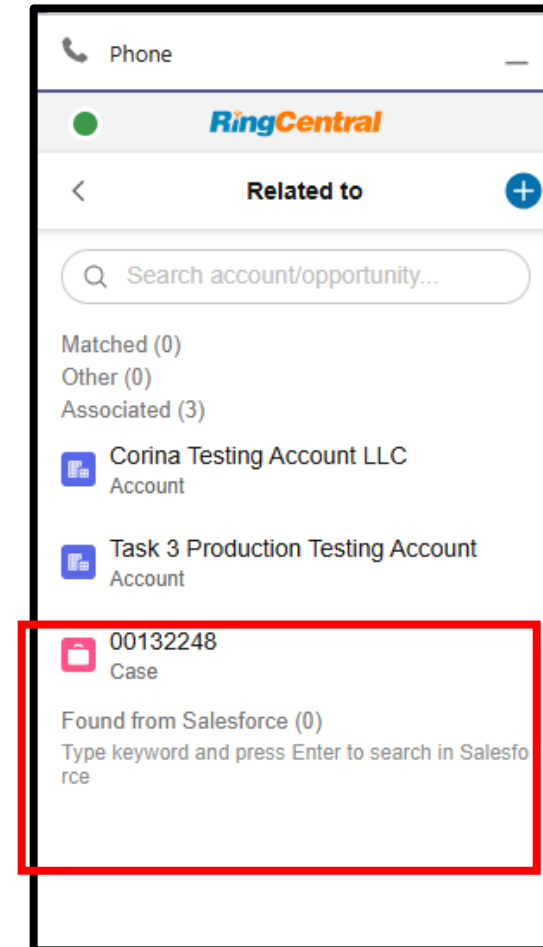
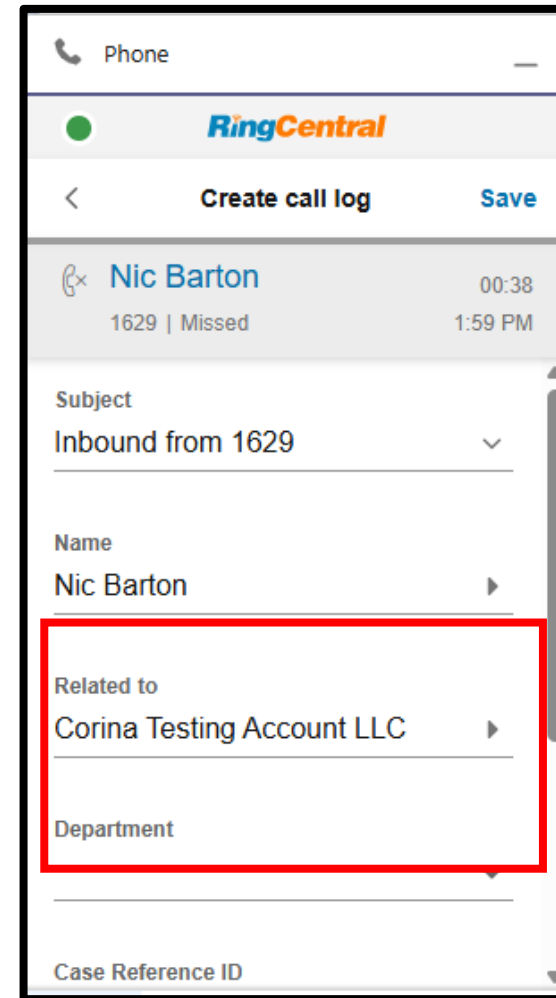


# Using RingCentral in Salesforce

## Managing Incoming Calls



- Receiving calls in Salesforce is simple. RingCentral will automatically open the dial pad when a phone call comes in
- If the caller is an existing contact in Salesforce, RingCentral will match the caller's phone number to the contact record and display the name in the window
- Salesforce will also try to identify any related records that the caller might be associated with, like the Account in this example. To review all associated records, click the arrow next to "Related to"
- By clicking on the Case, Salesforce will automatically change the Related To record association and start a call log relating the incoming call to the Case selected.



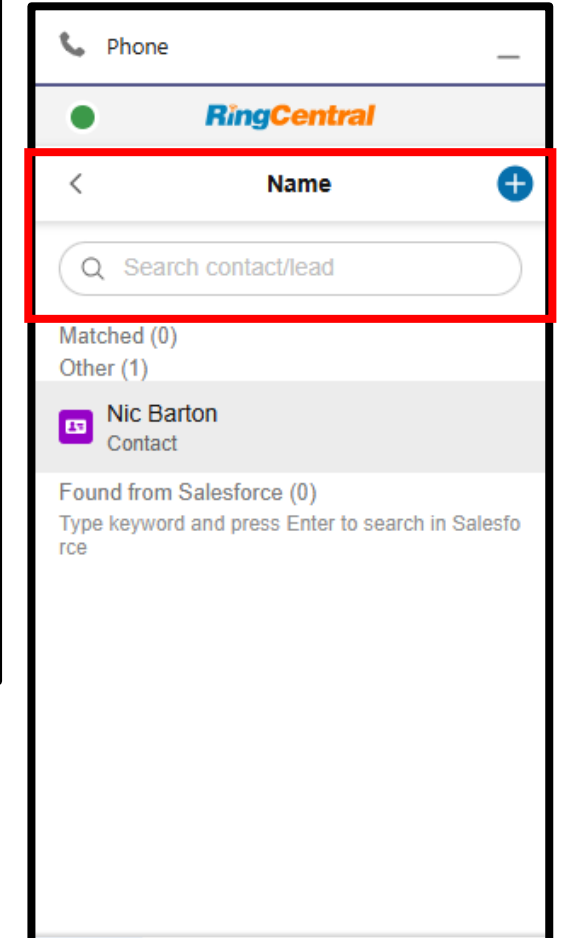
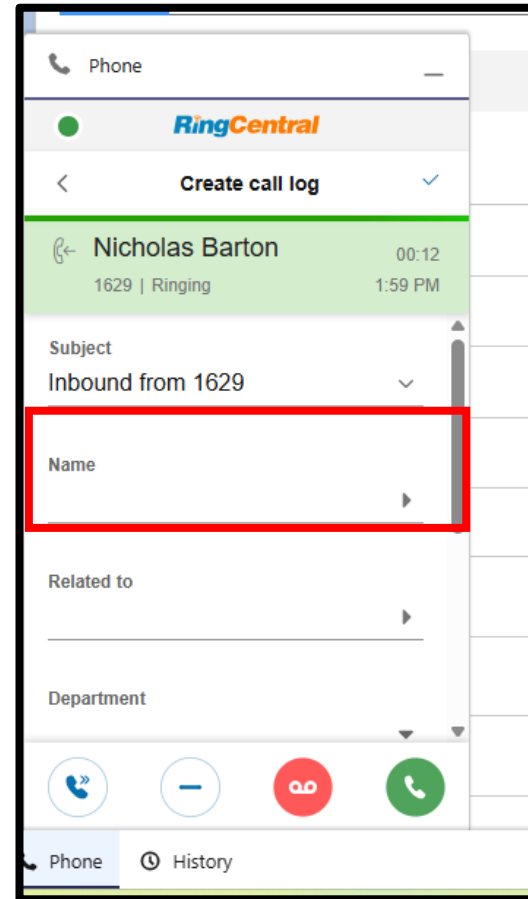
**Risk Alert:** To ensure your phone call notes are assigned appropriately, be sure to Relate the call to a Case and not to an Account. Call notes assigned to an Account can be read by other IPRO Salesforce Users.

# Using RingCentral in Salesforce

## Managing Incoming Calls



- If the wrong contact is identified by the system or no contact is found, select the arrow next to Name
- A search box will appear so you can search to associate an existing Contact
- You can create a new Contact by clicking the + sign. This will bring up a blank Contact screen without closing out RingCentral

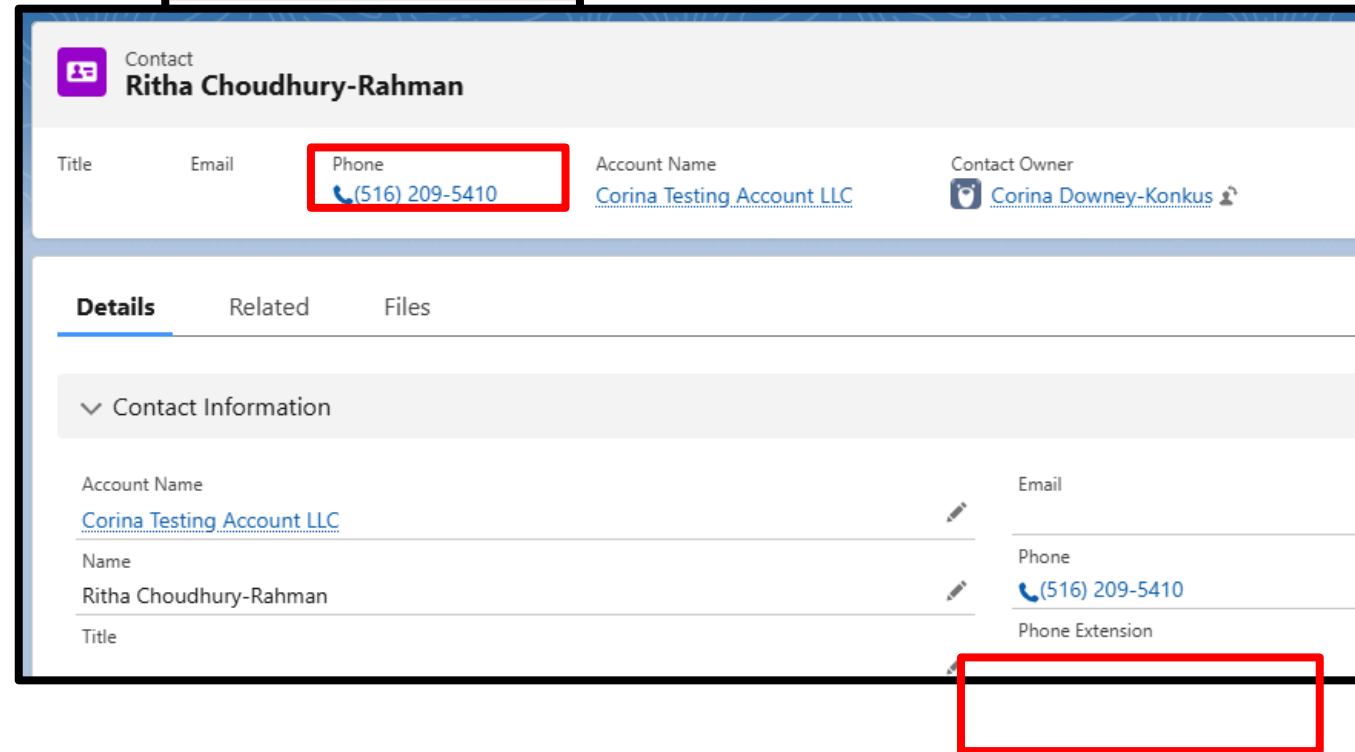
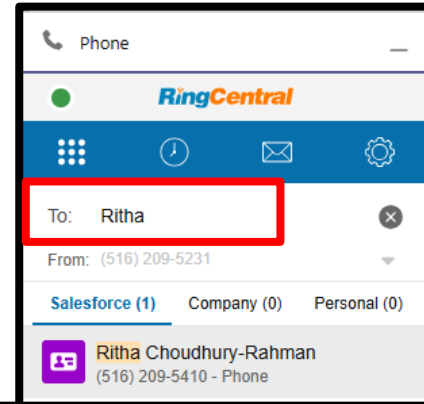


# Using RingCentral in Salesforce

## Placing Outbound Calls



- To place an outbound call from RingCentral, you can use one of two choices: the dial pad or click-to-call
- As previously discussed, to bring up the dial pad, click the phone icon at the bottom of the Salesforce page. You can either enter the phone number or search a Contact Name to bring up the Contacts phone number
- Click-to-Call is just that, utilizing an auto-dial between Salesforce and RingCentral by clicking on a phone number from a record when it is visible in **blue**



If you notice that a phone number in Salesforce is in **black**, that means you have not logged into RingCentral within Salesforce. Bring up RingCentral and log in

# Using RingCentral in Salesforce

## Placing Outbound Calls



- When you click the blue phone number, RingCentral will automatically bring up the call window
- This will list the outbound call, Contact name, Contact phone number, and provide the option to relate the record to an Account or Case

A screenshot of the Salesforce RingCentral interface. The top section shows contact information for Ritha Choudhury-Rahman, including her phone number (516) 209-5410 and account name Corina Testing Account LLC. Below this, a 'Details' tab is active, showing a call log entry for Ritha Choudhury-Rahman. The call log entry includes the subject 'Outbound to +15162095410', the name 'Ritha Choudhury-Rahman', and a 'Related to' section that is highlighted with a red box. The 'Related to' section shows '0 match, 1 associated'. The call log entry also shows a duration of 00:05 and a time of 3:38 PM. The interface includes various fields for contact information, a 'Create call log' button, and a 'Phone' dropdown menu.



**Risk Alert:** To ensure your phone call notes are assigned appropriately, be sure to relate the call to a Case and not to an Account. Call notes assigned to an Account can be read by other IPRO Salesforce Users.

# Part 3: Recording Your Call Notes

# Salesforce Phone Call Activity Tracking



- One of the advantages of using RingCentral in Salesforce is the automatic start for capturing data as a Salesforce Activity
- Whether the call is Inbound or Outbound, you will be presented with the same pieces of information
  - Subject – Inbound or Outbound
  - Name – Connects to a Salesforce Contact
  - Related To – Select the Case for this Contact
  - Notes – Detail about the phone call
- To access the Notes during the Call, scroll to the bottom of the RingCentral widget. You can start capturing the information during your call in this space
- When the Note capture is complete, select Save in the top right corner of the widget

A screenshot of the RingCentral 'Create call log' form in Salesforce. The form is titled 'Phone' and 'RingCentral'. It shows a call log entry for 'Ritha Choudhury-...' with a duration of '00:05' and a time of '4:55 PM'. The call status is 'Hung up'. Below the call log, there are fields for 'Department', 'Case Reference ID', and 'Call Topic'. At the bottom, there is a 'Notes' field with a red box around it. The 'Save' button in the top right corner is also highlighted with a red box.

# Salesforce Phone Call Activity Tracking



**Activity** Engagement History

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

▼ **Upcoming & Overdue**

No activities to show.  
Get started by sending an email, scheduling a task, and more.

▼ **May • 2025** **This Month**

> [Outbound to +15162095410](#) Today

You logged a call

No more past activities to load.

**Activity History (1)**

[Outbound to +15162095410](#)

Related To:  
Task:   
Due Date: 5/12/2025

[View All](#)

- After saving your call notes, Salesforce will create the phone call activity and mark it complete.
- If you associated the call with a Case, you can go to that case and view the Activity in the Activity History panel

# Salesforce Phone Call Activity Tracking

## Adding further details



- Additional information can be added to the Activity
- Click on the activity itself, highlighted in blue,
- On the detailed Activity layout you can add additional notes, change the Related To, or update any additional data that you were unable to complete with the quick-start from RingCentral

A screenshot of the Salesforce 'Activity' page, specifically the 'Engagement History' section. The interface shows a list of activities. One activity, 'Outbound to +15162095410', is highlighted in blue and has a red rectangular box drawn around it. Below the main list, there is a detailed view of the selected activity, showing it as a task with a due date of 5/12/2025. The 'View All' link is visible at the bottom of the detailed view.

**Activity** Engagement History

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

▼ **Upcoming & Overdue**

No activities to show.  
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▼ **May • 2025** **This Month**

> **Outbound to +15162095410** Today

You logged a call

No more past activities to load.

**Activity History (1)**

[Outbound to +15162095410](#)

Related To:

Task:

Due Date: 5/12/2025

[View All](#)

# Salesforce Phone Call Activity Tracking

## Adding further details



- In this example, you can see that the user forgot to relate the activity to a Case
- By editing the activity, a user can search for the correct Case, associate it to the record, add any additional Comments as needed, then hit Save.
- The existing Activity will now update with the new information

The screenshot displays the Salesforce interface for a Phone Call Activity. The top section shows a task record titled "Outbound to +15162095410" assigned to "Ritha Choudhury-Rahman". The "Details" tab is active, showing task information such as "Assigned To: Corina Downey-Konkus", "Due Date: 5/12/2025", and "Completed Date/Time: 5/12/2025, 3:38 PM". A red box highlights the "Related To" field in the task details.

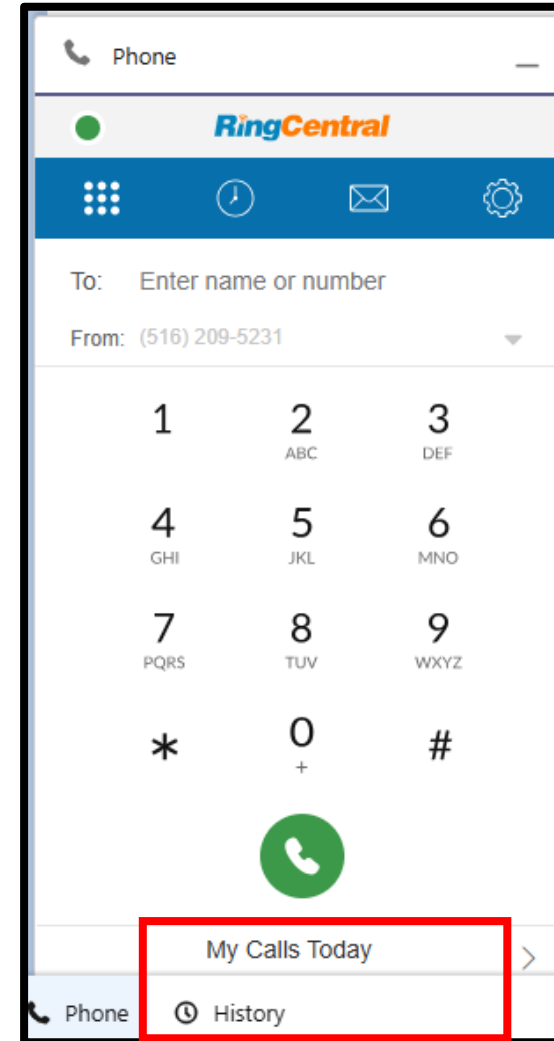
The bottom section shows the edit form for the task. The "Related To" field is highlighted with a red box and contains the value "00194567". The "Name" field is filled with "Ritha Choudhury-Rahman". The "Comments" field contains the text "Talked about xyz". The "Call Recording" section is visible at the bottom, and a red box highlights the "Save" button.

# Salesforce Phone Call Activity Tracking

## Missing Call Activity



- Sometimes a user may forget to hit the Save button after adding notes in the RingCentral widget or may be jumping call to call and not have an opportunity to record details in real time.
- When this happens, the details can still be captured by going to either the My Calls Today from the dial pad, or the History button in the bottom tool bar



# Salesforce Phone Call Activity Tracking

## Missing Call Activity



- By selecting the My Calls Today, you will be directed to a report of all your calls for that day.
- From the report you should click on the call subject to be directed to the activity details screen for that activity.

Report: Tasks and Events  
**My Calls Today**

Total Records  
2

	Assigned	Subject	Date	Status	Company / Account	Contact
1	Corina Downey-Konkus	Outbound to +15162095410	5/13/2025	Completed	Corina Testing Account LLC	Ritha Choudhury-Rahman
2	Corina Downey-Konkus	Outbound to 1629	5/13/2025	Completed	Corina Testing Account LLC	Nic Barton

Task  
**Outbound to +15162095410**

Name  
[Ritha Choudhury-Rahman](#)

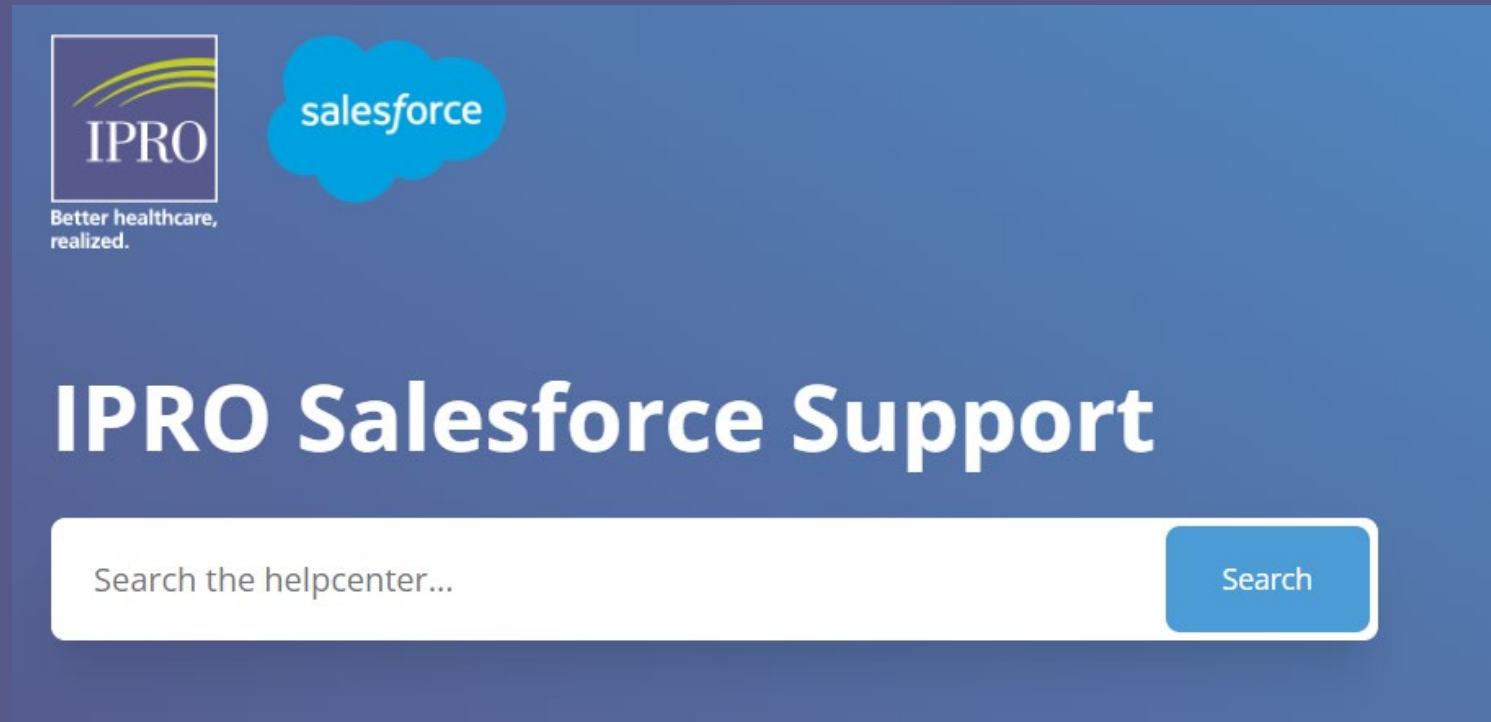
Related To

**Details** Related

Task Information

Assigned To	<a href="#">Corina Downey-Konkus</a>	Related To	
Due Date	5/12/2025	Name	<a href="#">Ritha Choudhury-Rahman</a>
Completed Date/Time	5/12/2025, 3:38 PM	Comments	Talked about xyz
Subject	Outbound to +15162095410	Call Recording	
Priority	Normal		
Status			

# Questions?



The screenshot shows the top section of the IPRO Salesforce Support page. On the left, there is the IPRO logo with the tagline "Better healthcare, realized." and the Salesforce logo. The main heading "IPRO Salesforce Support" is centered in large white text. Below the heading is a search bar with the placeholder text "Search the helpcenter..." and a blue "Search" button.



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