Using the RingCentral for HubSpot native integration

RingCentral for HubSpot is a native integration that allows users to make calls, view caller details, and log interactions while working in the HubSpot platform.

Key features

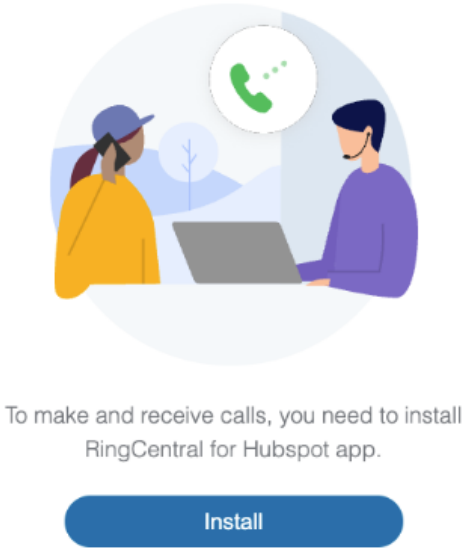
- Make and receive calls within your browser.
- Search contacts by name or phone number in the keypad.
- Display matched caller information in HubSpot when answering calls.
- Log calls to matched companies, contacts, deals, tickets, or any existing associations.
- Switch seamlessly between different HubSpot hubs.

This guide explains how to authenticate, set up, and use the RingCentral for HubSpot integration. Before starting the setup, make sure you have admin rights in both HubSpot and RingCentral and you're using the same email address for both platforms.

Installing RingCentral for HubSpot

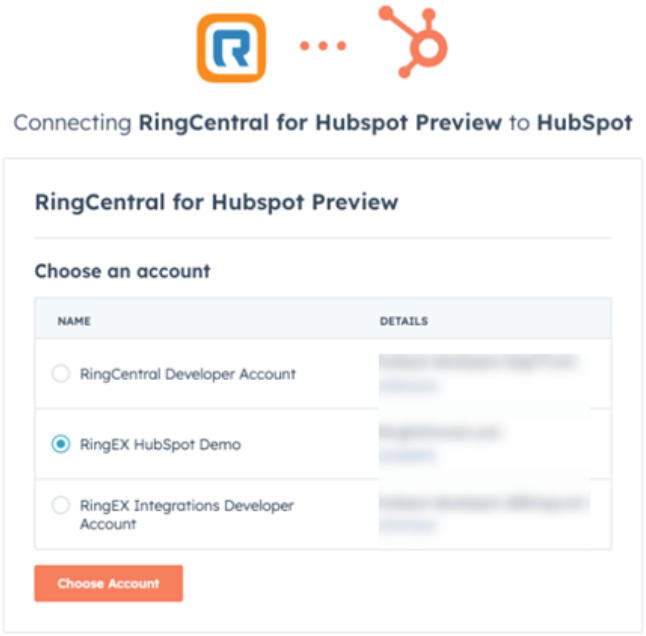
RingCentral for HubSpot is a native extension available directly from the HubSpot Marketplace. Follow these steps to install the integration:

1. Sign in to your HubSpot account as an admin.
2. Go to the **RingCentral** listing in the HubSpot Marketplace.
3. Click **Install**.



4. Select the appropriate HubSpot workspace to connect to RingCentral.

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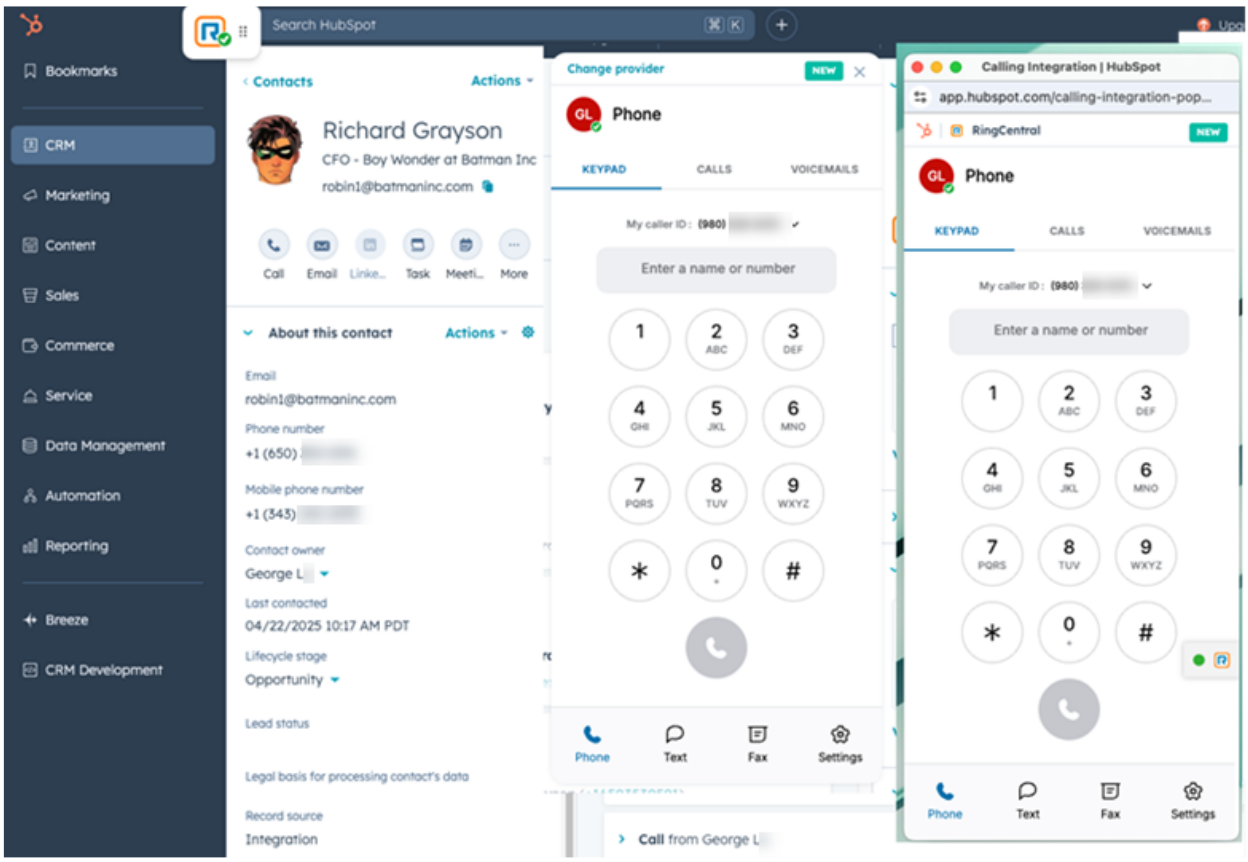


5. Refresh the page and click the **phone** icon at the top of the HubSpot dashboard.
6. Follow the on-screen instructions to complete the authorization.
7. Click **Choose Account**.
8. Refresh the page and click the **Phone** icon at the top of the HubSpot application.
9. Follow the on-screen instructions to complete the authorization.

Call window and settings

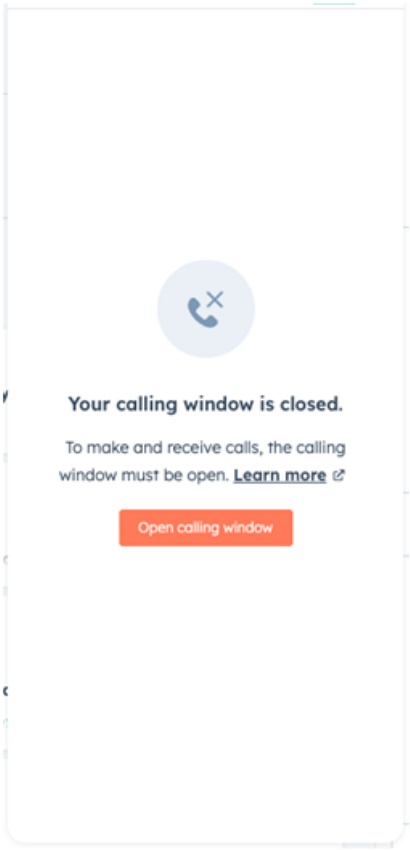
The RingCentral for HubSpot integration opens two calling windows to help maintain a stable connection with your RingCentral app. These windows mirror each other—any action you take in one window will reflect in the other.

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Important: We recommend having the remote (detached) calling window open to maintain the status and connection to your RingCentral for HubSpot app.

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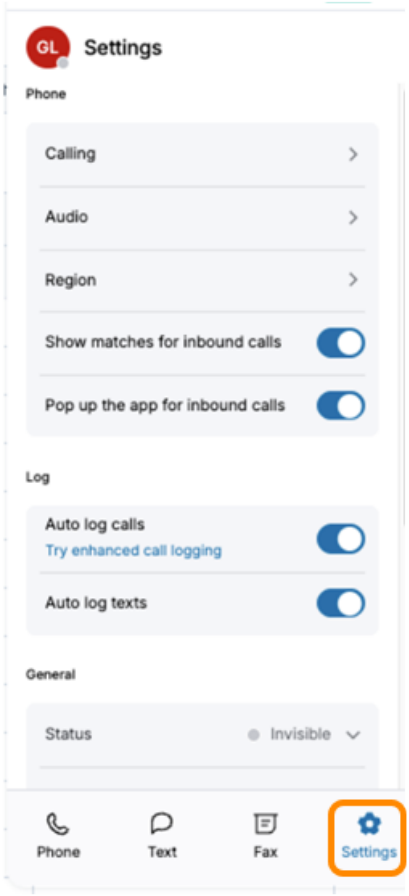


Settings

To set up your preferences, click the **Settings** icon in the bottom navigation bar.

- **Calling**: Choose your preferred RingCentral calling method: *Browser*, *RingCentral app*, *RingCentral Phone*, or *RingOut*. The app will route calls to the selected endpoint. Note: Dispositions must be completed in the primary integration window.
- **Audio**: Choose your audio input and output for calls. You can also adjust sound levels and ringtones.
- **Region**: Select your country to apply the correct dialing code. If you select the US or Canada, enter an area code to turn on 7-digit local dialing.
- **Show matches for inbound calls**: Displays details for a matched contact in a new HubSpot page during an inbound call. Currently, matches will display for answered calls only.
- **Pop up the app for inbound calls**: Opens the app when a call is received.
- **Auto log calls**: Log calls automatically by setting up additional logging options, including server-side logging, in the Integration Console.
- **Auto log texts**: Logs text message conversations into a contact.
- **Status**: Set your availability (*Available*, *Busy*, *Do not disturb*, or *Invisible*). This status will sync with other RingCentral apps.
- **Switch account**: Select another authenticated hub to connect a different HubSpot workspace. The email address used must match both your HubSpot and RingCentral accounts.
- **Logout**: Sign out of the RingCentral for HubSpot app. Any call logs in the drafts will be saved automatically.

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Logging calls

RingCentral for HubSpot supports both client-side and server-side call logging.

Manually logging calls

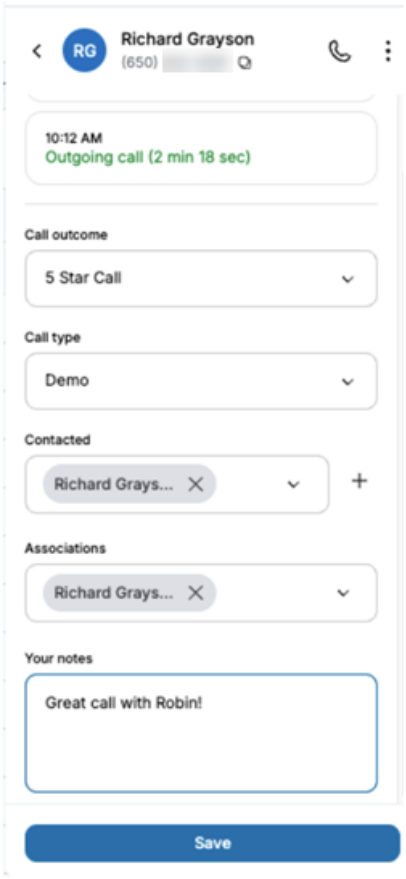
You can log a call anytime from the **Create call log** screen. The **Save** button becomes active once you select at least one association (such as a contact, company, deal, or ticket).

The following fields are available for manual logging:

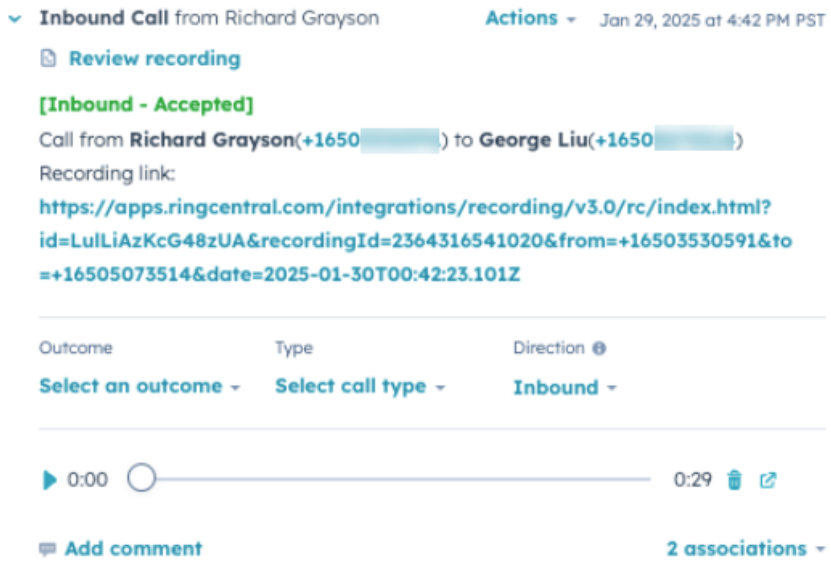
- **Call direction**: Automatically detects the direction of the call.
- **Call outcome** (optional): Select a value from the **Call outcome** dropdown. If the values have changed in HubSpot, sign out and sign back into RingCentral for HubSpot to sync the updates.
- **Call type** (optional): Select the **Call type** dropdown (if this setting is turned on in your HubSpot settings) to categorize the call. If the values have changed in HubSpot, sign out and sign back into RingCentral for HubSpot to sync the updates.
- **Contacted**: Displays the matched HubSpot contacts. Select from existing contacts, search, or create a new contact. The call will be logged to the selected contacts.
- **Associations**: Displays matched HubSpot associations (contact, company, deal, ticket). If a contact is selected in the **Contacted** field, this contact will automatically display in the Association field.

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- **Your notes** (optional): Add notes to include in the HubSpot call log.



After saving, the call log will appear in the activity feed of the associated contact as a call activity type.



Viewing call logs

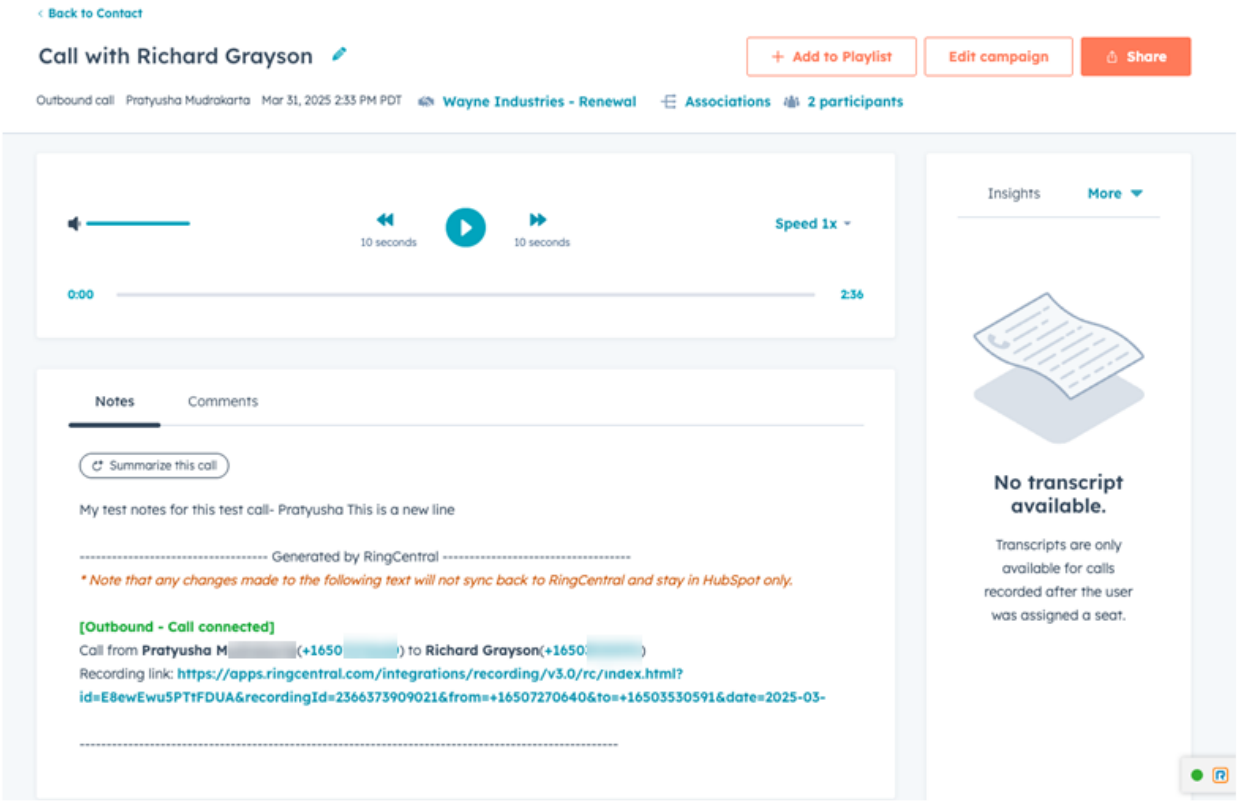
After clicking Save, the call log is generated in HubSpot for the selected associations.

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To view the log:

1. Click View to open the call log in a new tab.
2. Click the Associations field to view details for a specific entity.

Call duration and call recordings (if available) will be updated when ready. You can play recordings directly in HubSpot if you're signed into RingCentral for HubSpot. Call recordings are also available using the Admin Portal.



Auto logging calls

RingCentral for HubSpot supports auto call logging.

1. Go to **Settings**.
2. Click the **Auto log calls** toggle on.

Note: Auto logging only applies to calls made from the integration within a web browser. You can use Activity sync to set up offline contact logging.

There is a 20-second countdown that appears near the **Save** button when auto logging is set up. If you don't change the contact details, the call logs automatically at the end of the countdown.

The following call logging behaviors will occur depending on the contact:

- **Single match**: Call is logged under the matched contact.
- **Multiple matches**: Call is logged under the most recently modified matched contact. If there is no recent contact, it logs to the last modified matched company.
- **No match**: A new contact is created with the format: "Caller [phone number in E.164 format]."

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- **Anonymous call**: A new contact named “Anonymous” is created. Future anonymous calls will log under this contact.

If you make any changes before the call ends, the app will apply the changes after the countdown. If you make changes after the call ends, the timer will disappear, and you’ll have to select at least one association and log the call manually.

Logging calls with Activity sync

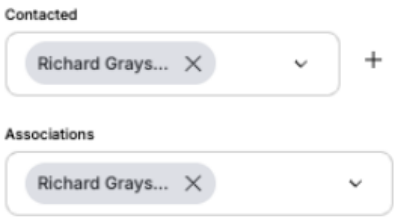
Admins can manage logging behavior through the Integration Console using Activity sync. The following options can be set up:

- Logging rules based on call types
- Lists of users included or excluded from logging
- Offline logging for all RingCentral endpoints

Using the Contacted and Association fields

You can use the **Contacted** and **Association** fields in HubSpot to manage and update how call details are logged in HubSpot.

- **View and select matched contacts**: Matched HubSpot contacts will appear in the list. To select a contact, click the checkbox next to the name. You can select more than one contact.
- **Filter results**: Enter a name in the search bar to filter the search results. Matching contacts are highlighted automatically.
  Note: Don’t press **Enter** when filtering results.
- **Search for existing HubSpot contacts (Contacted only)**: Enter a value in the search bar and press Enter to find a specific contact.
- **Create a new contact (Contacted only)**: Click the Plus icon to create a new contact. Select the new contact to log the call details.
- **View and select related associations**: Matched associations will appear in the association dropdown based on HubSpot objects related to the phone number.



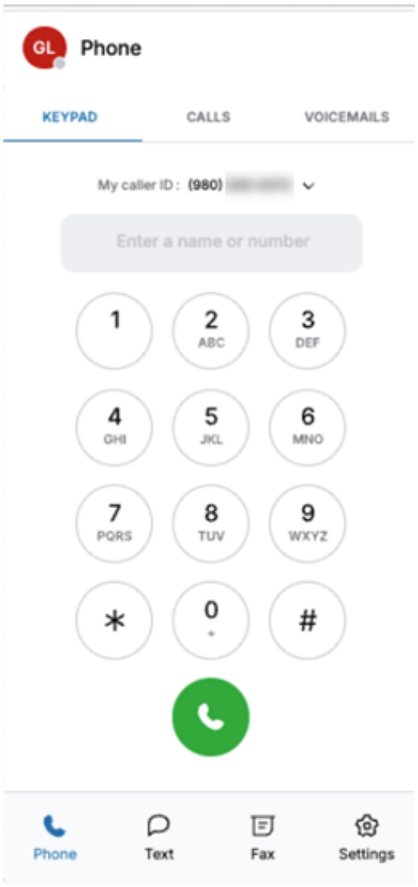
If the call information is unknown, click the **Contacted** field to find or create a contact. Once selected, the call will be logged under that contact.

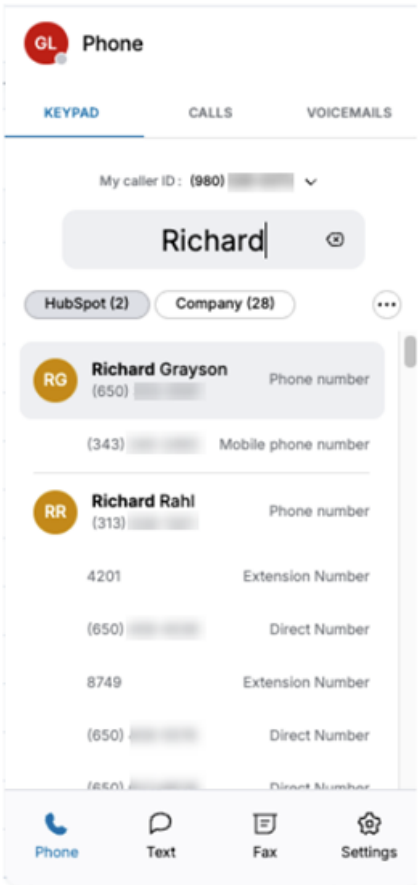
Using the calling features

To make a call using RingCentral for HubSpot, enter a name or phone number into the search bar. The app will search after more than three characters or digits are entered, and matched contacts and companies will appear in the dropdown. Select a contact and click the **Phone** icon to initiate the call.

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You can also enter a number directly in the keypad and click the **Phone** icon to dial.

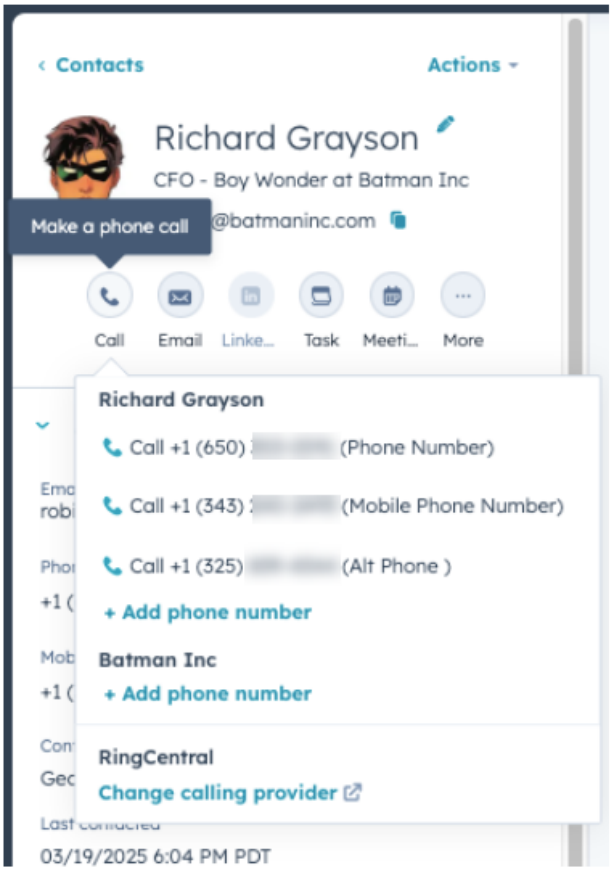




Using click-to-dial to make a call

Click the **Call** icon next to a contact's number in HubSpot to use click-to-dial for a phone call. Select **RingCentral** as the calling provider, then the call will start automatically in the RingCentral integration.

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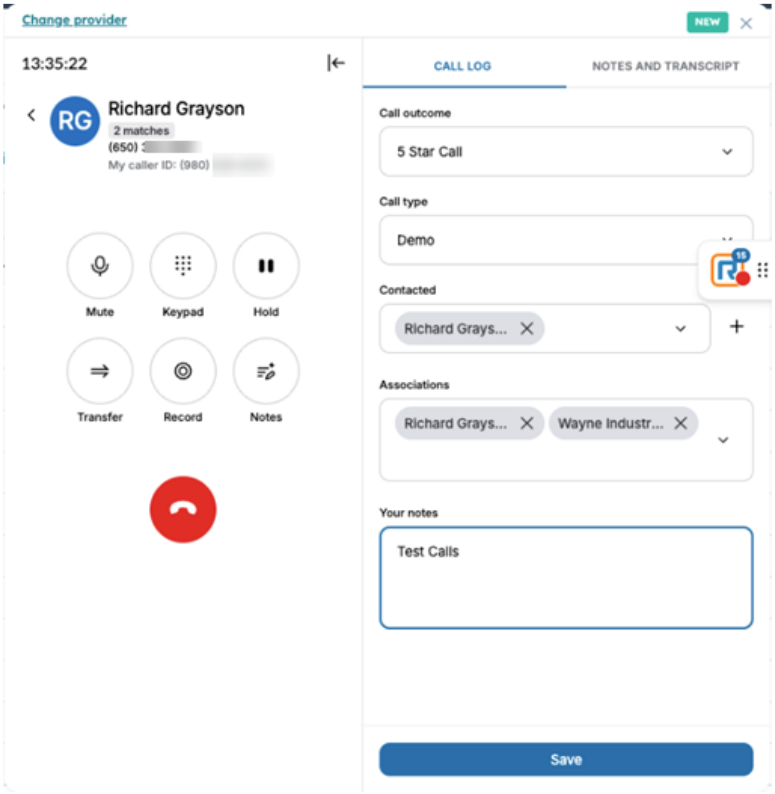


Active call window

When you make or receive a call, the RingCentral integration window expands so you can manage the call. The following controls are available during an active call:

- **Mute/Unmute**: Turn your microphone on or off.
- **Keypad**: Enter numbers during the call.
- **Hang up**: End the call.
- **Hold**: Place the caller on hold or resume the call.
- **Transfer**: Send the call to a different number.
- **Record**: Start or stop recording the call.
- **Notes**: Turn on to generate AI notes and a transcript, and add your own notes to the contact record.

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Logging text messages (SMS)

Text message conversations can be recorded into a contact. When a text message hasn't been logged, the **Create log** icon will appear on the **All** or **Text** tab, or in the conversation page. Click this icon to:

- View all matched HubSpot records (contacts, companies, deals, tickets).
- Search for existing HubSpot records.
- Select up to three records to associate with the text.

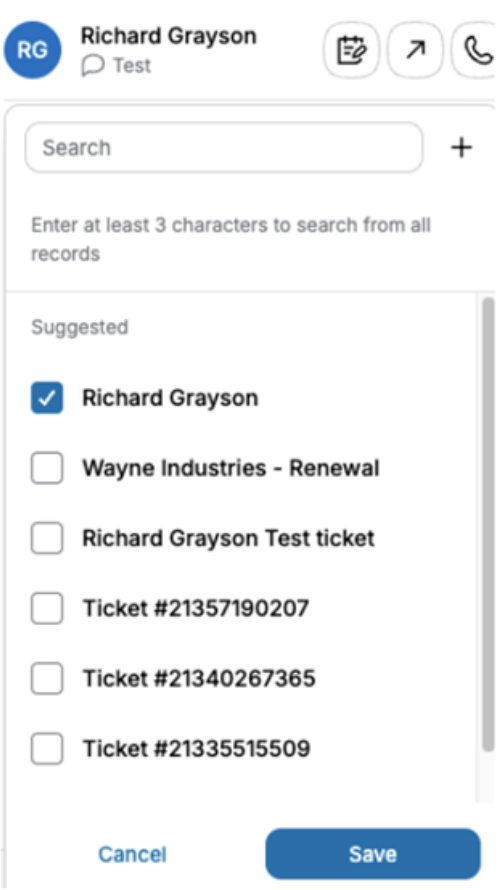
After you select at least one record, the **Save** button will be active. Click **Save** to log up to 50 text messages from the past seven days.

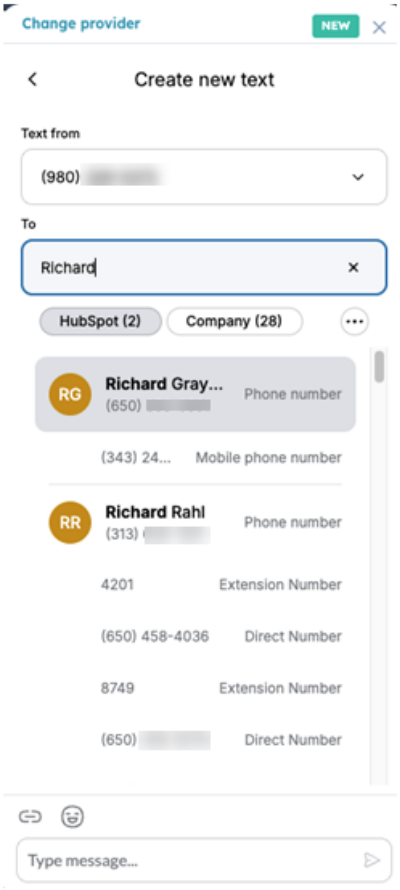
Click **View log details** to open the associated HubSpot record. If you make changes but don't save, your edits will be stored as a draft. When new messages arrive, the **Create log** icon replaces the **View log details** or **Draft** icon.

Each text message is logged as a custom timeline event in the contact's HubSpot activity feed. Events are listed by the date the message was received or sent.

Note: You can't edit custom timeline events.

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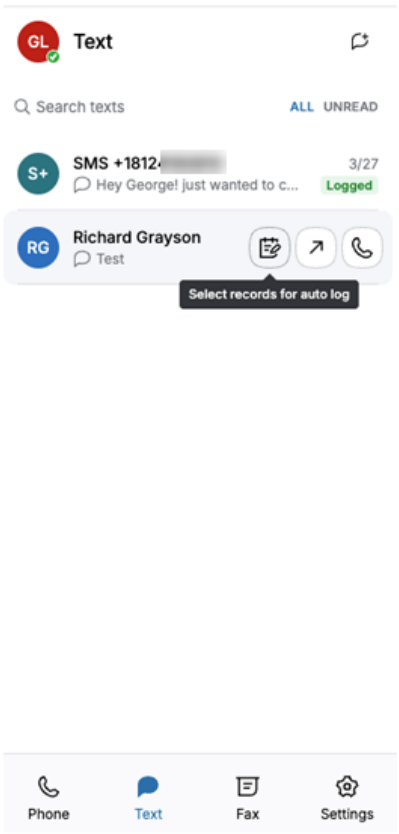


Auto logging text messages

You can turn on the **Auto log texts** feature to log text messages automatically, even when you're offline. When auto logging is set up:

- All incoming and outgoing texts will be logged automatically.
- The **Create log** and **Continue editing** options won't appear.
- The **View log details** option will remain available if a text message has logging details.

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The following SMS logging behaviors will occur depending on the contact:

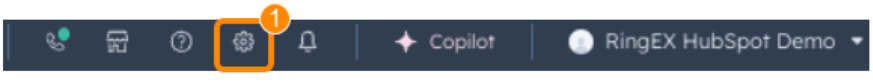
- **Previously logged conversation**: New texts are added to the same records.
- **No previous log**: Logging is based on contact matching:
  - No match: A new contact is created using the phone number, for example, SMS +15551234567.
  - Single match: Logs to that record.
  - Multiple matches: SMS is logged under the most recently modified matched contact. If there is no recent contact, it logs to the last modified matched company.

Text messages are typically logged within 10 minutes. If logging fails, the app will retry up to 11 times within a 36-hour window.

Uninstalling the app

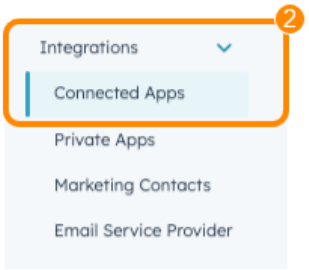
If you no longer need access to RingCentral for HubSpot, uninstall the app.

1. Click the **Settings** gear icon in the top bar of the HubSpot platform.

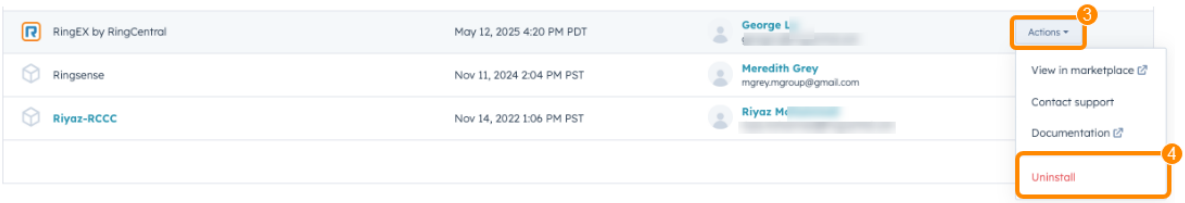


2. In the Settings page, click the **Integrations** dropdown, then **Connected Apps**.

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3. Click the **Actions** dropdown.
4. Select **Uninstall**, then complete the steps.



Uninstalling the integration removes it from the calling provider options for all users. Previously logged data will remain in HubSpot and won't be affected.

For more information, view HubSpot's uninstall guide. You can reinstall the app from the HubSpot Marketplace anytime.

Additional resources
RingCentral for HubSpot FAQs
Call logging options in RingCentral for HubSpot

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