

## RingCX CRM integrations

Elevating customer service with seamless CRM integration



### Streamlining service delivery

When servicing customers, agents often have to switch between systems to find the information they need, which can lead to delays and fragmented experiences. RingCX eliminates these context switches by seamlessly integrating with leading customer relationship management (CRM) systems to create unified, immersive agent experiences.

These integrations ensure agents can access all the customer information they need from one location, directly within their CRM, to improve service efficiency and satisfaction. In addition, with the RingCX browser extension for Google Chrome and Microsoft Edge and direct routing for Microsoft Teams, it has never been easier for agents to interact with and service customers from whichever application they are using.

### Out-of-the-box CRM integrations

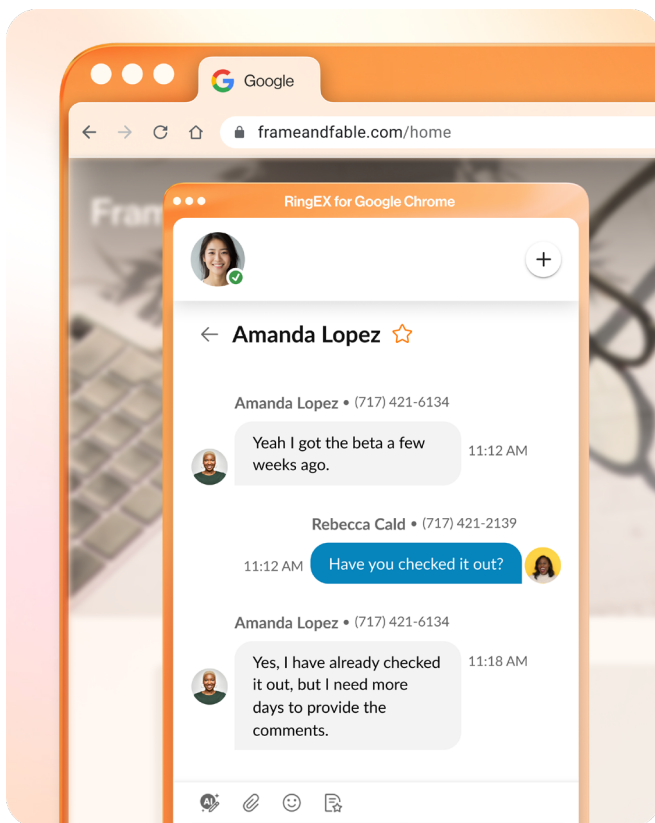
RingCX delivers a fully connected, omnichannel experience, with out-of-the-box CRM integrations, that allow agents to leverage the technology they use every day to service customers. This immersive experience makes it easier for agents to access the information and capabilities they need to quickly satisfy customers.

The embedded RingCX agent experience is currently available for CRMs from:

- Freshdesk
- Hubspot
- Microsoft Dynamics 365
- Salesforce
- ServiceNow
- Zendesk
- Zoho

CRM integrations are included in the RingCX package at no additional charge. RingCentral is committed to continuously innovating and expanding its ecosystem of pre-built integrations with RingCX to further enhance agent experiences.

## Key CRM integration capabilities



## Inbound and outbound voice support

Unlike integrations from other vendors that are often limited in the channels they support, RingCX provides both inbound and outbound voice support.

## Omnichannel

Engage customers in the channel of their choice with support for 20+ digital channels, such as email, messaging, social, in-app, web, and more.

## Contact matching

Automatically match any inbound interactions with the CRM's records to ensure agents know exactly who they are dealing with in real-time.

## Screen pops

Put critical customer information at the fingertips of agents with screen pops.

## Automatic ticket and case creation

Create or manage existing tickets or cases in the CRM to ensure continuous progress.

## Click-to-call functionality

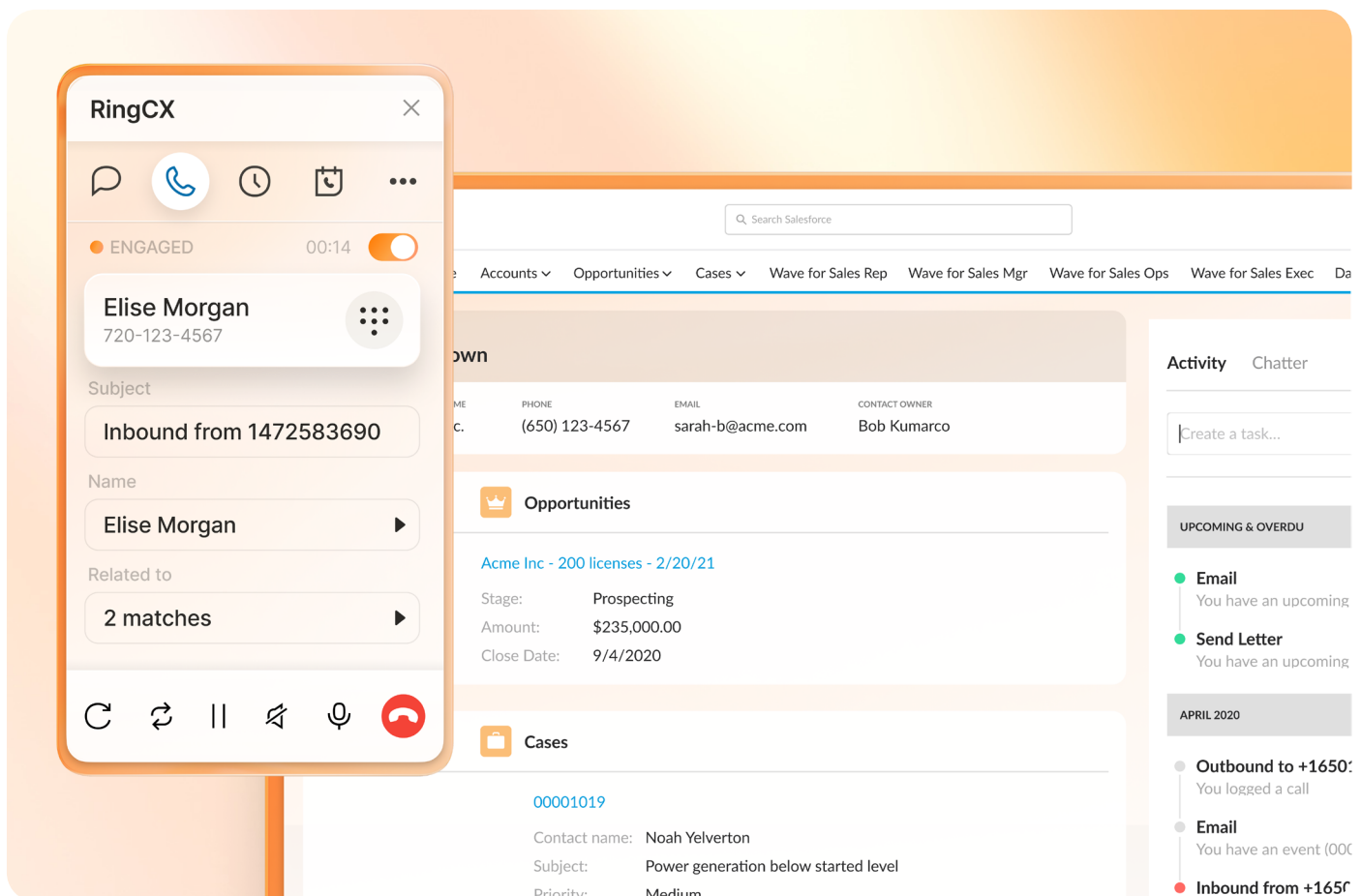
Initiate calls to customers directly from the CRM records to proactively address their needs.

## Logs and recordings

Automatically log all customer interactions to ensure CRM records are complete; store recordings of calls in the CRM for future reference.

## Summaries and transcripts

Gain insights from real-time AI-generated transcripts and post-call summaries, which can be stored in the CRM, to keep engagements progressing and improving.



## RingCX browser extension for Google Chrome and Microsoft

Give agents a way to work in a web browser, whether using a home grown CRM or other business tool to service customers. The RingCX extension for Google Chrome and Microsoft Edge can be configured to open a designated URL when an agent receives a call, giving them instantaneous access to relevant customer information and internal resources that can help them help their customers. Instead of having to switch to another application, agents can answer inbound calls directly from the web or initiate outbound interactions with click-to-dial capabilities that ensure they can stay focused on giving the customer what they need.

## Direct routing for Microsoft Teams

The RingCX direct routing for Microsoft Teams integration blends the RingCX contact center experience seamlessly into Microsoft Teams, allowing users to make and receive calls without leaving the application. The integration upholds RingCentral's 99.999% uptime Service Level Agreement for Teams users, empowering them with uninterrupted access to essential tools.

## Benefits of RingCX CRM integrations



### Simplified agent workflows

Eliminate the time and hassle of navigating multiple systems or applications by equipping agents with the tools and information they need within their CRM to resolve customer inquiries quickly and efficiently.

### Increased productivity

Reduce the load on agents by simplifying and automating tasks, like looking up customer information, transcribing interactions, or updating customer records.

### Faster issue resolution

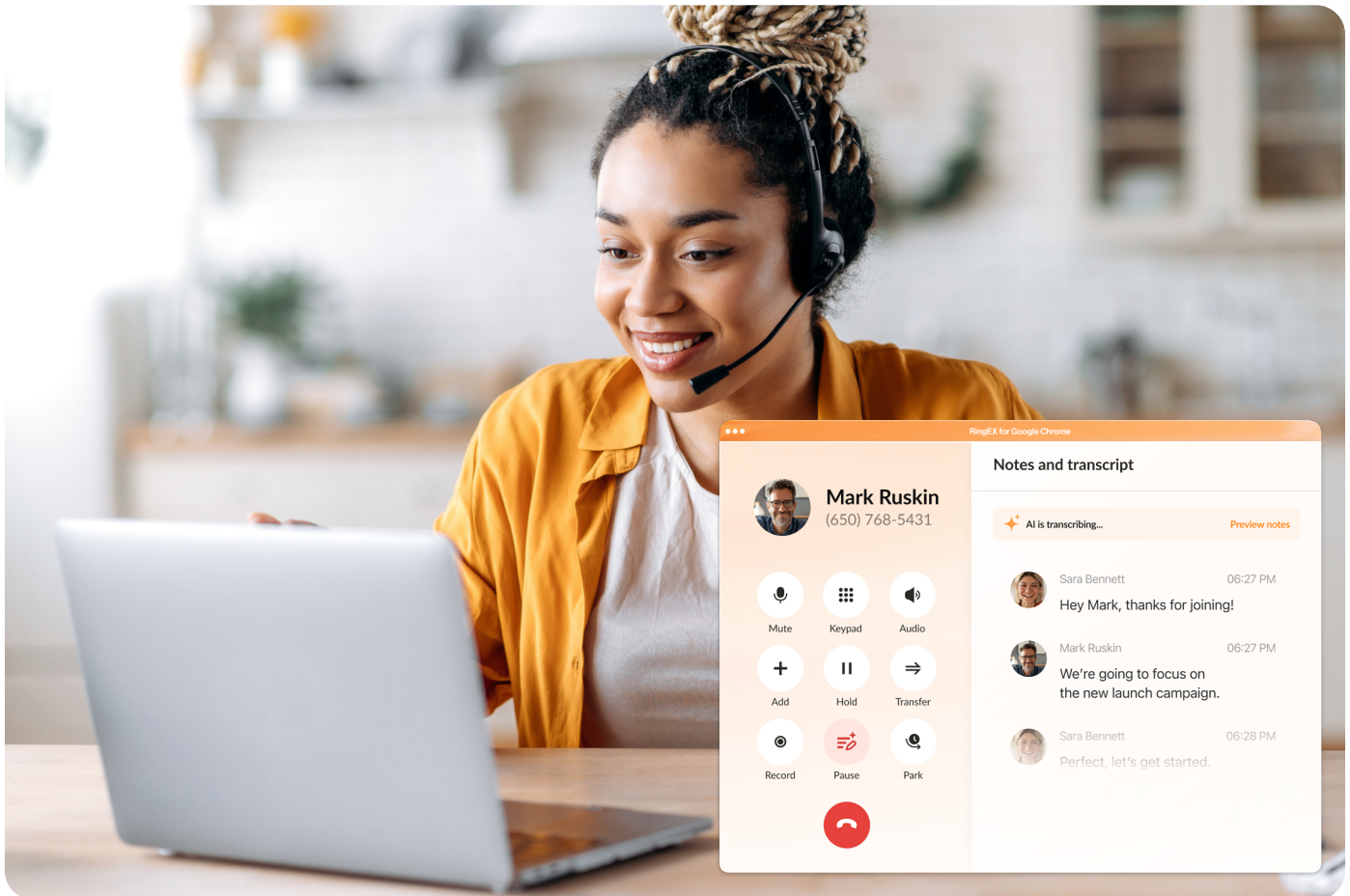
Free agents to focus on customer interactions without interruption to accelerate response times and build stronger customer relationships.

### Improved customer satisfaction

Ensure agents have all the pertinent customer information they need in front of them and can engage in the customer's channel of choice to provide personalized support that satisfies.



In conclusion, RingCX CRM integrations create immersive agent experiences that improve service efficiency and overall satisfaction. Agents can easily access the customer information they need directly within the tools they use every day to provide effortless service that keeps them and their customers happy.



For more information, please contact a sales representative. Visit [ringcentral.com](https://ringcentral.com) or call 855-774-2510.



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