

RingCentral for HubSpot

User Guide

For version 21.4.2 and above



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Introduction

About RingCentral for HubSpot

RingCentral for HubSpot provides seamless integration between [HubSpot](#) and RingCentral to improve customer services, greater agent productivity, and advanced business processes.

Key features

- Make inbound or outbound calls within your browser
- Click-to-dial on any phone number/mobile number in HubSpot
- Contact search by phone number/mobile number or name on the dial pad
- Prompt matched caller's information in HubSpot when answering calls
- Log calls to matched companies, contacts, deals, tickets, or any existing associations
- Create contacts easily while logging a call
- Allow switching between different hubs
- Send/receive/view and log messages
- Receive and play voicemail messages
- Receive and review faxes

About this Guide

This User Guide focuses on installing the application, making calls, logging calls, using messaging features, and configuring personal settings. It's specifically designed for end-users and is not intended for system/ network admins.

If you are looking for how to configure this app for your organization, refer to the Admin Guide:

https://netstorage.ringcentral.com/guides/HubSpot_admin_guide.pdf

User Notice

By using the RingCentral for HubSpot integration app, you acknowledge that you have read and agree to our Terms of Service and Privacy Policy.

- Terms of Service:

<https://www.ringcentral.com/legal/last-update-July-15-2021/eulatos.html>

- Privacy Policy:

<https://www.ringcentral.com/legal/last-update-August-6-2021/privacy-notice.html>

Sign-in and Configuration

Installing and signing in to RingCentral for HubSpot

RingCentral for HubSpot is a Google Chrome extension you can install from [Google marketplace](#) by clicking **Add to Chrome**. When the installation is complete, open RingCentral for HubSpot in your Chrome browser extension. Then, enter your RingCentral credentials, confirm your emergency address, select the HubSpot account you'd like to sign in to, and click **Done** to sign in to RingCentral for HubSpot app (Figure 1).

RingCentral for HubSpot app is also listed on [HubSpot marketplace](#) and [RingCentral App Gallery](#). However, the installation should always start from [Google marketplace](#).

The figure consists of three sequential screenshots of the RingCentral sign-in interface for HubSpot, numbered 1, 2, and 3.

Screenshot 1: Shows the initial sign-in screen. A blue button labeled "Sign In" is highlighted with an orange box and a red circle containing the number 1. Below it is a link that says "New user? Sign Up".

Screenshot 2: Shows the "Sign In" screen with a form. The "Email or Phone Number" field contains "smarsh9064.lin@gmail.com". A blue "Next" button is highlighted with an orange box and a red circle containing the number 2. Below the form are options to "Or sign in with" Google or Single Sign-on.

Screenshot 3: Shows the "Sign In" screen with a form. The "Direct, Fax or Main Number" field contains "smarsh9064.lin@gmail.com". The "Extension (Optional)" field is empty. The "Password" field is masked with dots. A blue "Sign In" button is highlighted with an orange box and a red circle containing the number 3. Below the form are "Back" and "Forgot Password?" links.

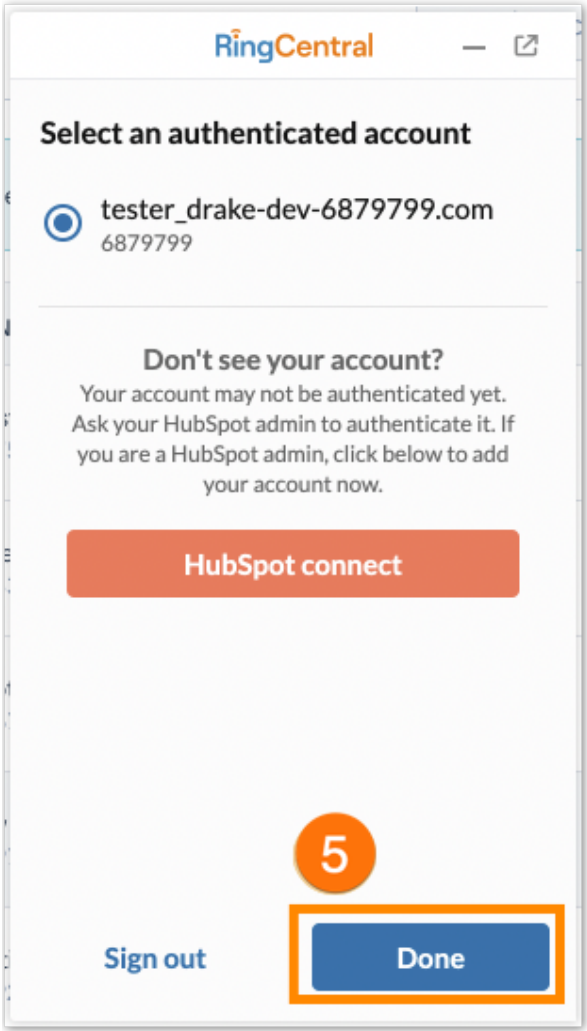
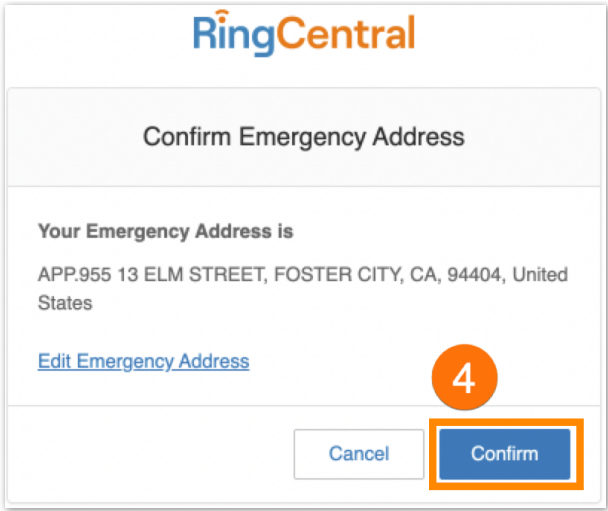


Figure 1

You'll see the page below (Figure 2) when there is no authenticated HubSpot account to connect. Check if:

- the email address you use to sign in to the RingCentral app is the same one you use to sign in to HubSpot
- you have access to the HubSpot account you'd like to connect in HubSpot.

If your answers are “Yes” to the two verifications, please click **Sign out** and contact your HubSpot admin to connect the HubSpot account(s) with the RingCentral app. The HubSpot admin can refer to the [Admin Guide](#) to see how to authenticate HubSpot accounts for the RingCentral integration app. After the admin successfully connected the HubSpot account with RingCentral, you can try to sign in to RingCentral for HubSpot again.

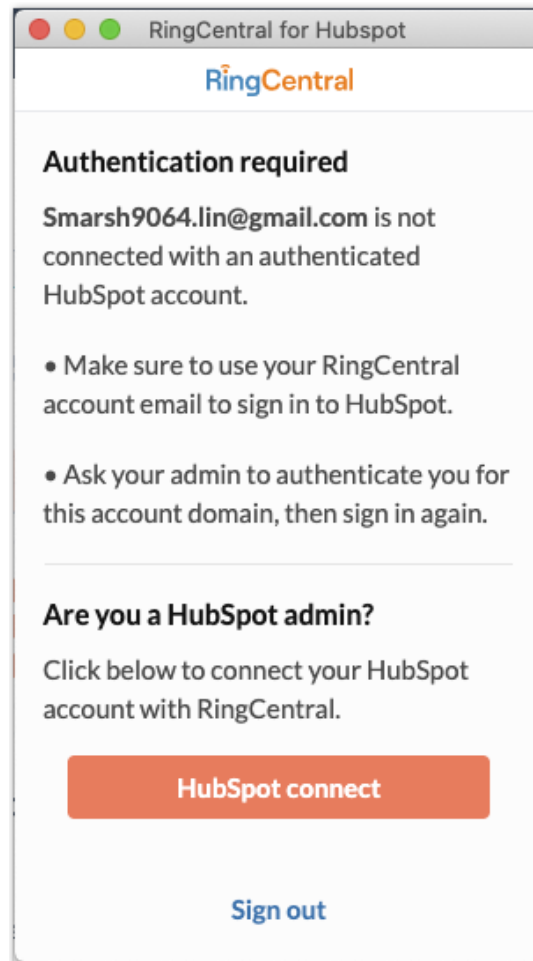


Figure 2

First-time users will see the welcome pages. Click **Next** to go through the welcome pages, and then you'll land on the **Settings** page to change configurations as needed (Figure 3).

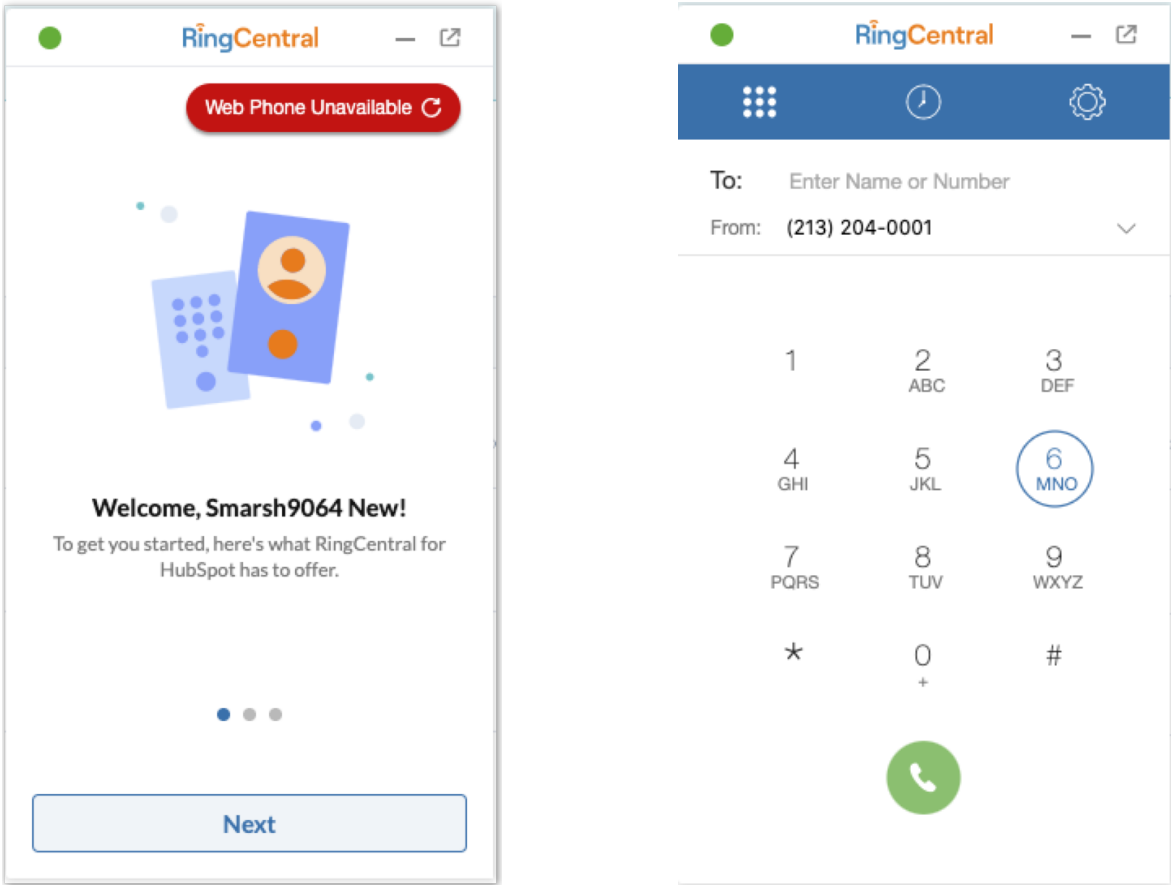



Figure 3

If you see the **Web Phone Unavailable** error in the top right corner (Figure 3), grant your Chrome browser access to your microphone (Figure 4). Click the spinning circle icon  to dismiss the error message. Afterward, you are ready to go (Figure 5).

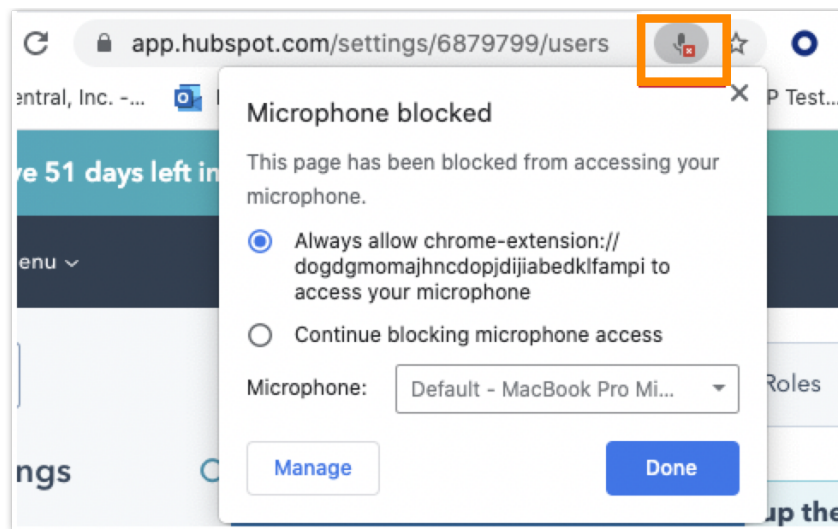


Figure 4

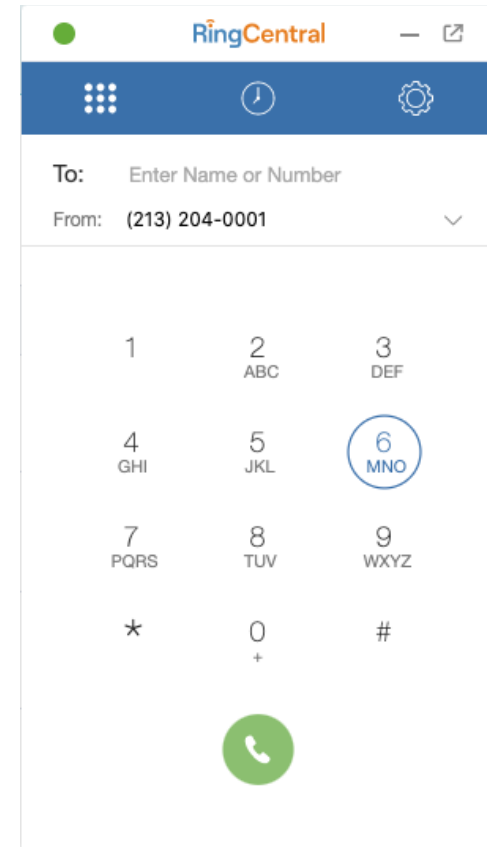




Figure 5

Basics and Settings

There are two modes of RingCentral for HubSpot: floating mode and standalone mode. You can click this icon  on the top right corner of the application to switch between the two modes.

- Floating mode: Only available on the HubSpot page. Click this icon  to fold the floating app into a badge and drag the badge along the right border of the HubSpot webpage (Figure 6).

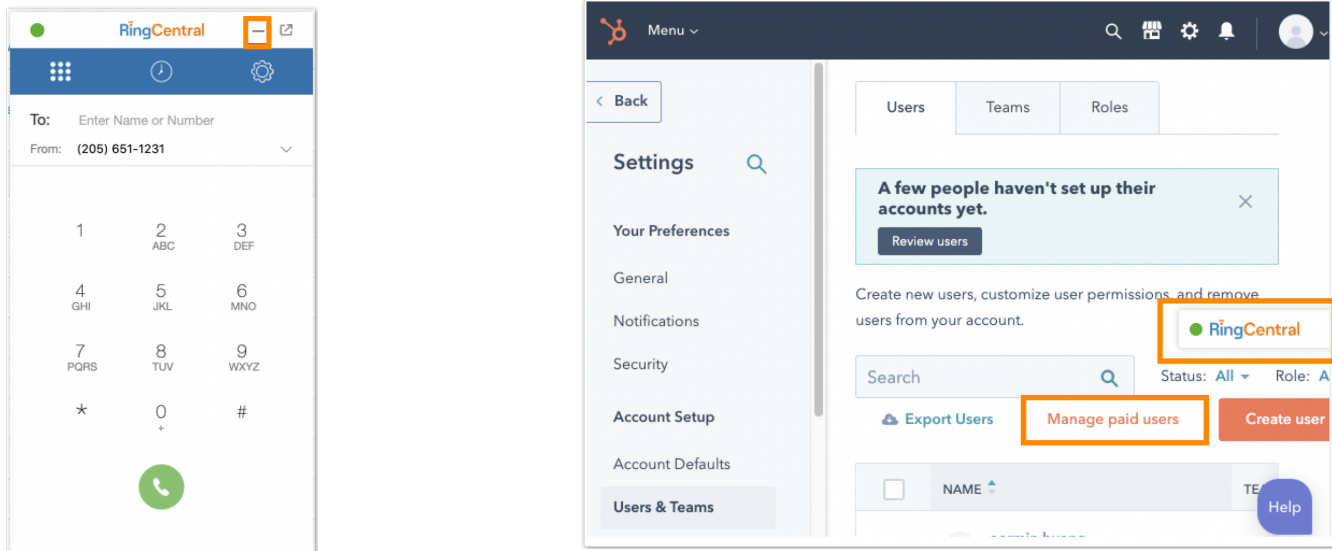


Figure 6

- Standalone mode: Available as long as your Chrome browser is open. You can drag the standalone app anywhere on your computer screen (Figure 7).

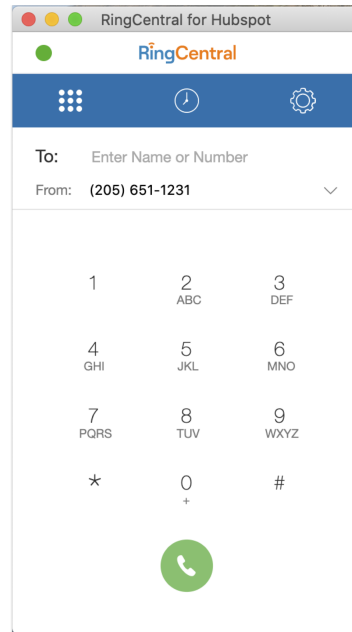



Figure 7

To optimize your experience, you can go to the **Settings** tab anytime by clicking the gear  icon on the top of the navigation bar. Below are options to configure the application per your preference(Figure 8).

- **Region:** Select the country you’re located in. You can use this country code for local dialing. If you select US/CA as your country, you need to specify an area code so that you only need to enter a 7-digit phone number for local dialing.
- **Audio:** Select the audio input and output devices when dialing from the browser.
- **Status:** Select your current status, including *Available*, *Busy*, *Do not Disturb*, and *Invisible*. The status syncs with other RingCentral applications.
- **Accept call queue calls:** If the current account has a call queue number, Accept call queue will also be shown in the Settings.
- **Auto log calls:** When the toggle is on, a call will be automatically logged when it ends. The default is off.
- **Show matches for inbound calls:** When the toggle is on, the matched contacts will be prompted in a new HubSpot page when answering an inbound call.
- **Switch account:** You can select a different authenticated hub and click **Save** to switch to a different authenticated HubSpot account (Figure 8). The radio button will default on the current HubSpot account that you are in. Also, if you are a HubSpot administrator, you can click on **HubSpot connect** to add more authenticated HubSpot accounts. Refer to the Admin Guide for details.
- **Logout:** Log out from RingCentral for HubSpot. Call logs in drafts will be saved automatically.

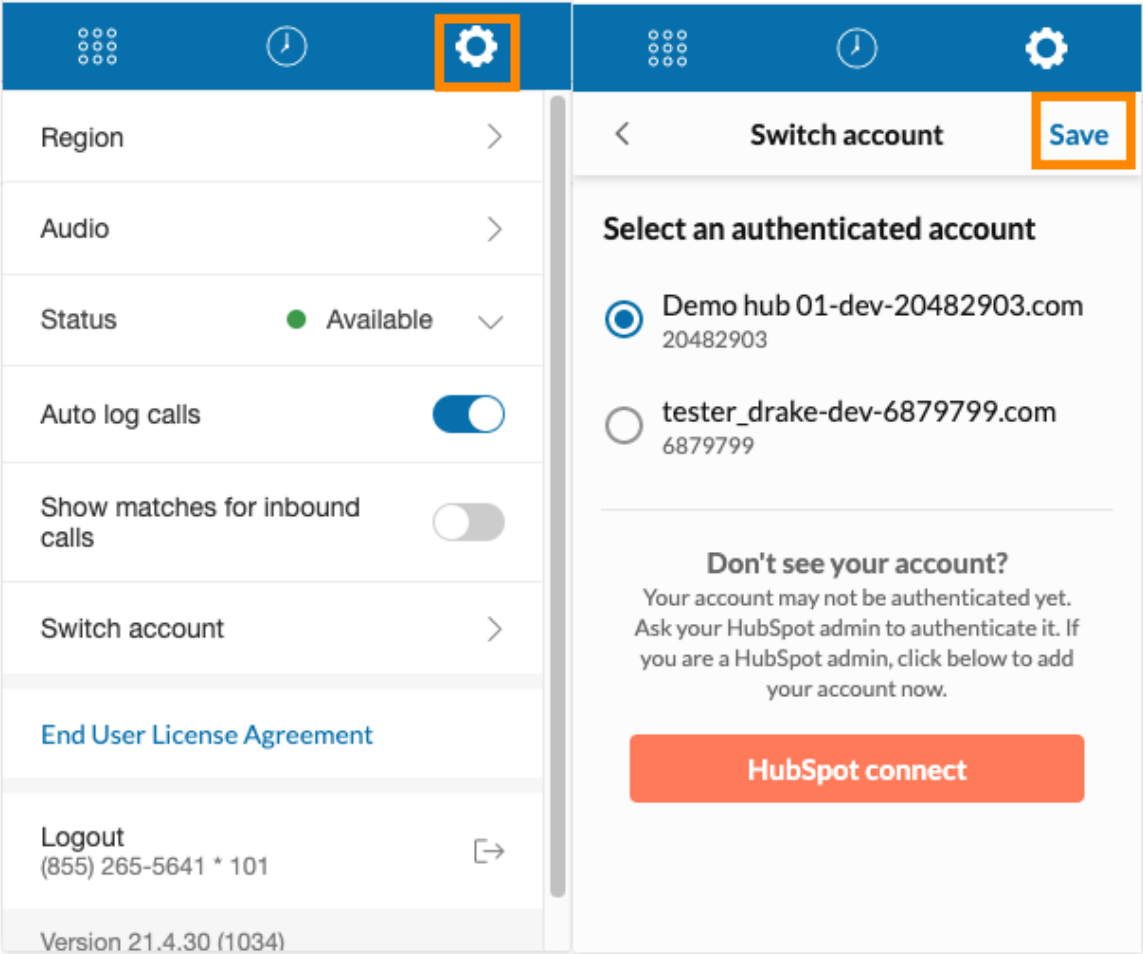


Figure 8

Place a call

After you sign in and configure the app, you can make outgoing phone calls. There are two ways to do so:

- Place a call from the dialpad
- Use click-to-dial feature

Placing a call from the dialpad

To place a call, search for a contact or company by the name or phone number/mobile phone number. The app will start searching when you enter more than three characters or numbers in the dial pad and pause for about a second (Figure 9, step 1). Matched contacts or companies (40 maximum) will be displayed in the dropdown (Figure 9, step 2). You can select the desired contact (Figure 9, step 2) and click the green phone icon to dial (Figure 9, step 3). You can also enter a phone number/mobile phone number and click the green call icon (Figure 10, step 2) to dial out directly.

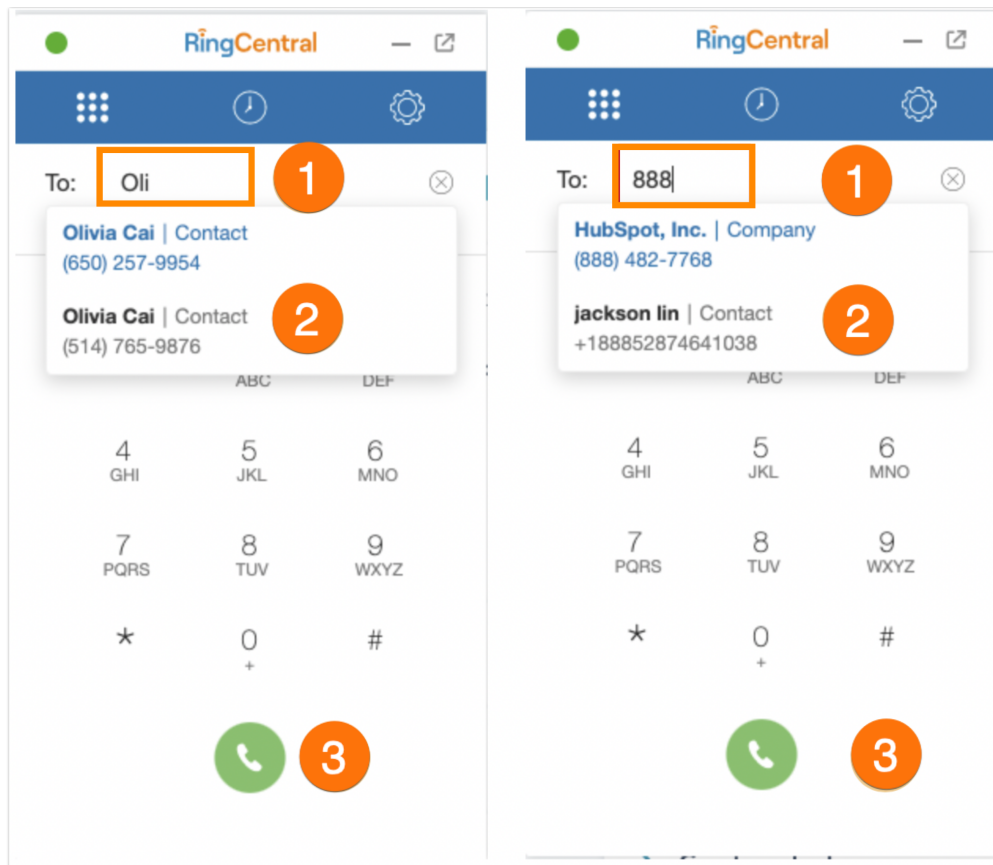


Figure 9

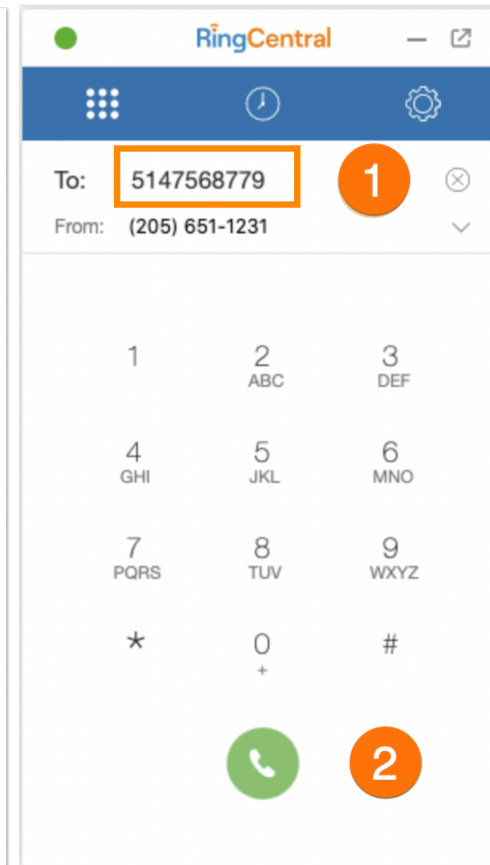



Figure 10

Using the click-to-dial feature

You can click from any phone number/mobile phone number in HubSpot to make an outgoing call. See Figure 11 as an example.

Hover over the field you would like to call, and the click-to-dial badge will show if the field is a legible phone number/mobile phone number. Click on the phone icon  to trigger RingCentral for HubSpot to dial out.

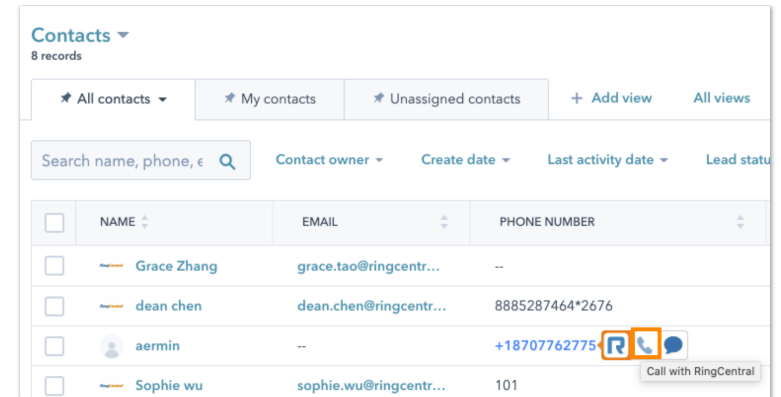


Figure 11

Using outbound call controls

When an outgoing call is connected through the browser, the following call control actions will be available:

- (1) **Mute/unmute**: Turn on/off the microphone on your call.
- (2) **Keypad**: Click the keypad to enter more numbers during a call
- (3) **Hang up**: Click to end the call.
- (4) **Transfer**: Transfer an existing call to another phone number.
- (5) **Hold/unhold**: Put the call on hold or not.
- (6) **Start/stop recording**: Record the call as an audio source or not.

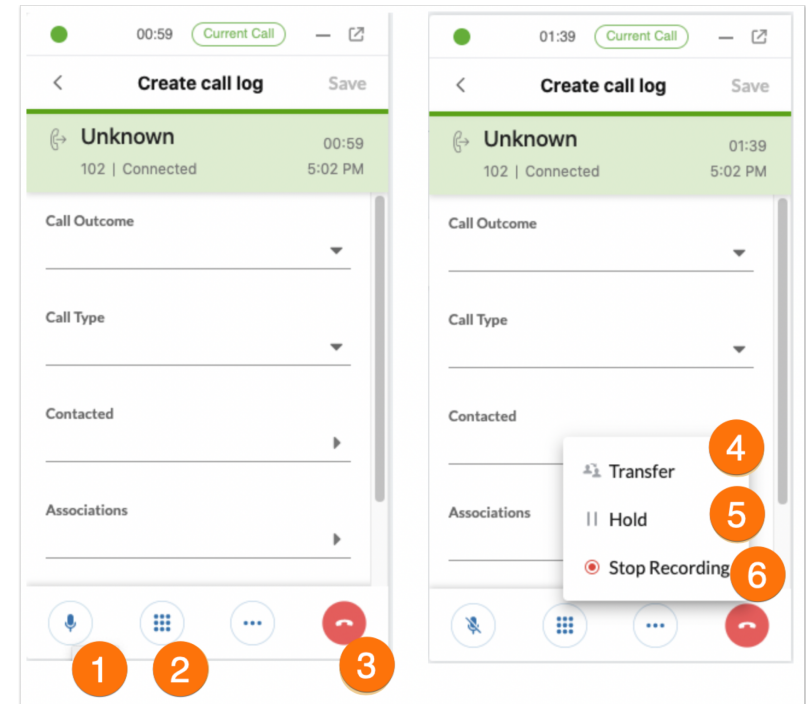


Figure 12

Receive an incoming call

RingCentral for HubSpot app supports inbound calls. When there is an incoming call, the app will ring and prompt a Google notification on the top right corner of your screen (Figure 13).

You can:

- (1) **Close**: Close the notification.
- (2) **Answer**: Accept the call, and Ringcentral for HubSpot app will appear.
- (3) **Ignore**: Ignore the call on the device.
- (4) **Settings**: Open Google notification settings.

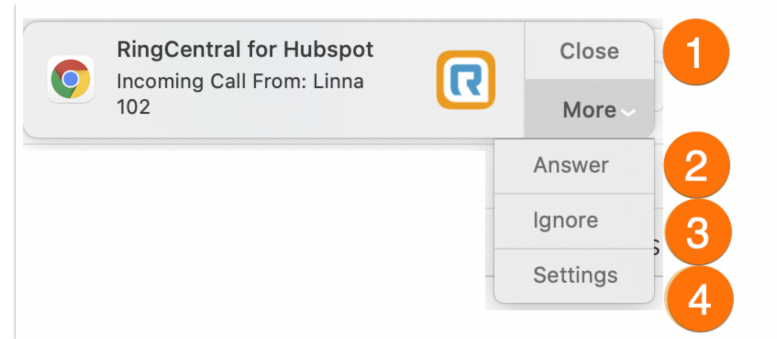


Figure 13

If you have RingCentral for HubSpot expanded when someone calls you, aside from the Google notification (Figure 13), you will also see the prompting app with more call information and call controls (Figure 14).

- (1) **Forward**: Forward the call to another phone number
- (2) **Ignore**: Ignore the call on the device.
- (3) **Voicemail**: Transfer the call to your voicemail.
- (4) **Answer**: Pick up the call. Once you answer the phone, you will have the same call controls in Figure 12.

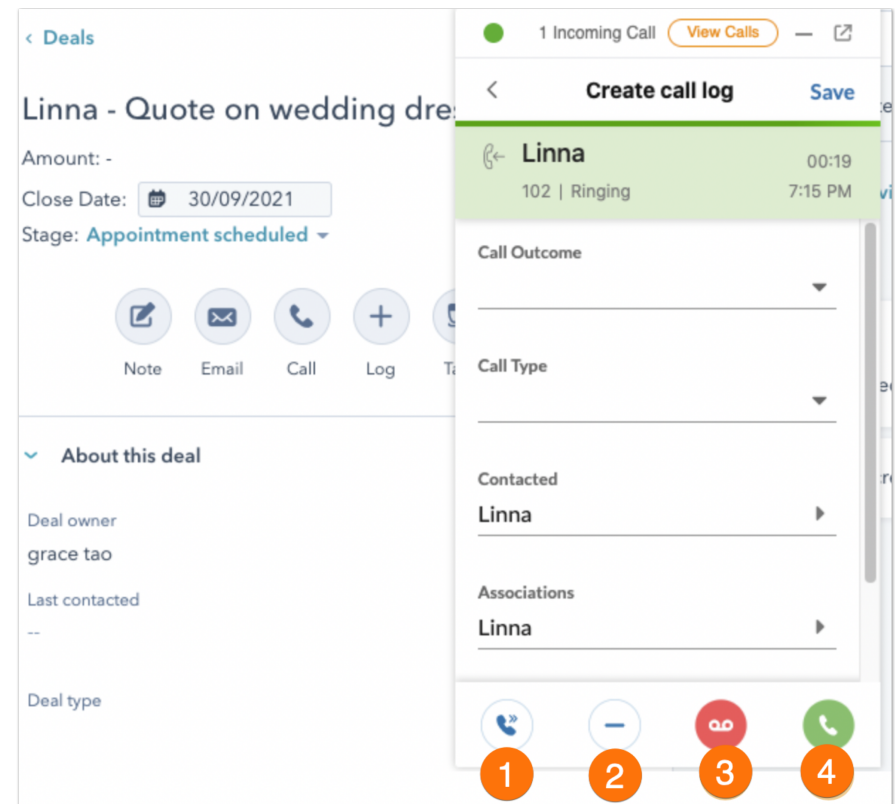


Figure 14

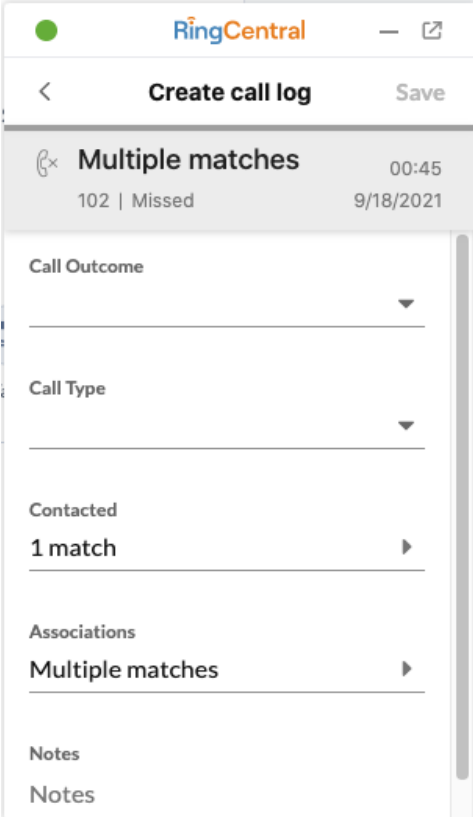
Log a call

Manual log calls

You can log a call anytime by clicking the **Save** button on the Create call log page. The **Save** button will be enabled when at least one association (contact, company, deal, ticket) is selected (Figure 15).

The RingCentral for HubSpot supports these fields at logging:

- **Call Outcome** (optional): A dropdown with values from HubSpot call outcome field. If the options of the call outcome field are updated in HubSpot, you can sign out and sign in to RingCentral for HubSpot to sync the changes.
- **Call Type** (optional): The dropdown will show when the call type field is configured in your HubSpot. If the options in the call type field are updated in HubSpot, you can sign out and sign in RingCentral for HubSpot to sync the changes.
- **Contacted**: Displays matched HubSpot contacts. You can select a contact(s), search contact(s), or create a new contact(s) so that the call will be logged under these fields.
- **Association**: Displays matched HubSpot associations (contact, company, deal, ticket). You can select association(s) as needed to log the call. The **Contacted** and **Association** fields are correlated. If you select a contact in the **Contacted** field, the same contact will be selected in the **Association** field.
- **Notes** (optional): Add notes that will be saved in the HubSpot call log.



The screenshot shows the 'Create call log' interface. At the top, there's a header with the RingCentral logo and a 'Save' button. Below the header, there's a section titled 'Multiple matches' with a duration of '00:45' and a date of '9/18/2021'. The main form area contains several fields: 'Call Outcome' (a dropdown menu), 'Call Type' (a dropdown menu), 'Contacted' (displaying '1 match' with a right arrow), 'Associations' (displaying 'Multiple matches' with a right arrow), and 'Notes' (a text input field).

Figure 15

View call log

When you click the **Save** button, a call log will be generated in HubSpot for the selected association(s).

Once a call is logged in RingCentral for HubSpot, you cannot edit the call log from the app. If you need to update a call log, you can proceed to HubSpot directly.

Click the **View** button (Figure 16, step 1) to prompt the corresponding call log in HubSpot in a new browser tab. You can also click on the **Associations** field (Figure 16, step 2 and step 3) and see more logging details for a selected entity (Figure 16, step 4).

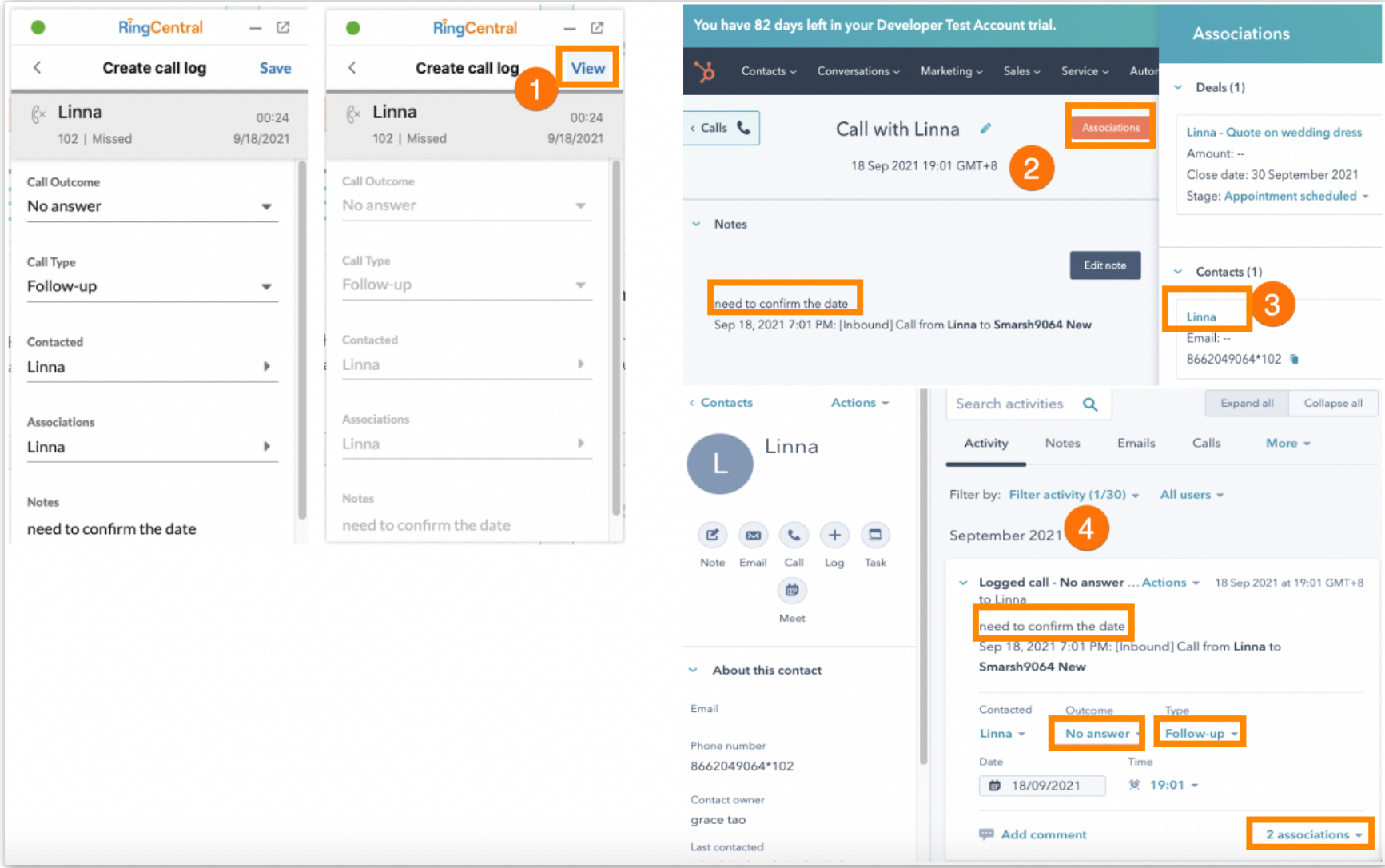


Figure 16

Since you can log a call anytime, the app will update the call duration automatically and the call recording (if there is one) when they are ready (Figure 17). You can play the call recording directly in HubSpot if (1) you signed into RingCentral for HubSpot and (2) you're the owner of the recording or have the company call recording permissions in Admin Portal.

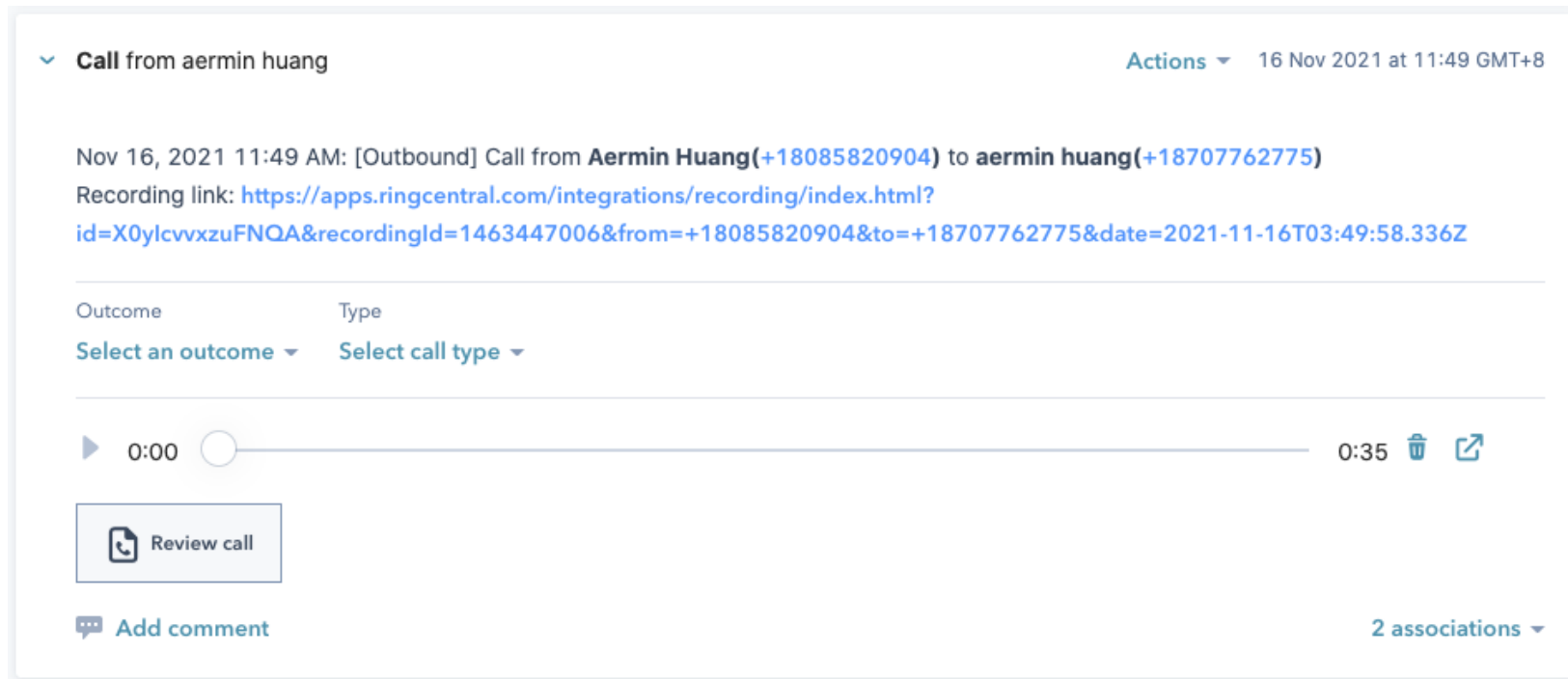


Figure 17

Contacted and Associations fields

Specifically, you can configure the **Contacted** or **Association** fields to do more actions (Figure 18).

- (1) View/select/unselect matched contacts: Matched contacts will be listed here. Click on the checkbox to select/unselect an entity. Multiple selections are allowed.
- (2) Filter results: Enter a name in the search bar (don't press Enter on the keyboard) and the app will highlight matched contacts.

- (3) Search for existing contacts in HubSpot (**Contacted** field only): Enter any value and **press Enter on your keyboard** to run a search.
- (4) Create a new contact (**Contacted** field only): Click on the **plus +** icon to create a new contact in HubSpot. You need to search for the creation if you want to log the call under the new contact.

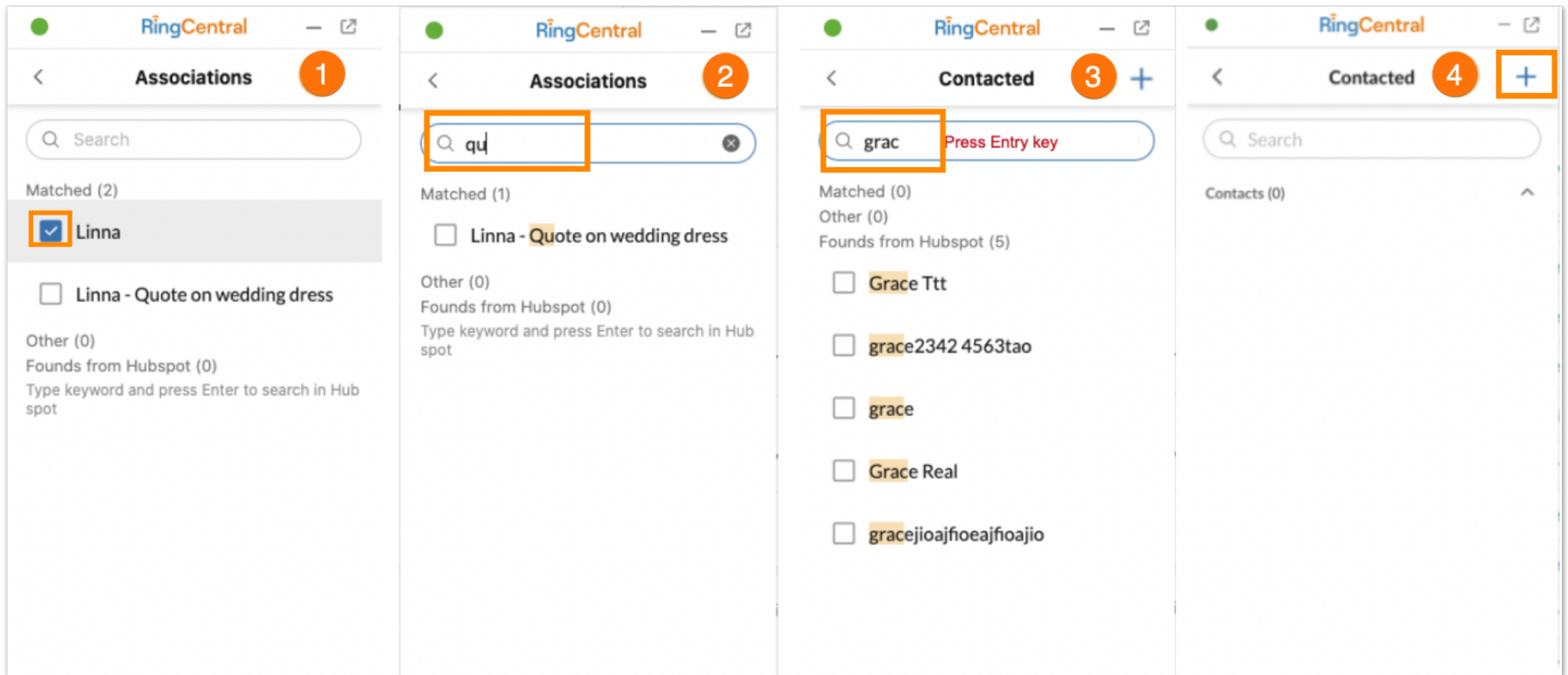


Figure 18

If there is a call with **Unknown** call information, you can click on the **Contacted** field to search for an existing contact or create a new contact, and then select this contact to log the call (Figure 19). Please see **General Questions 6** on page 29 for more Unknown related scenarios.

RingCentral

<

Create call log

Save

Unknown

00:03

(650) 257-9954 | Hung up

9/18/2021

Call Outcome

Call Type

Contacted

Associations

Notes

Notes

Figure 19

Auto log calls

RingCentral for HubSpot app supports auto call logging. You can turn on this feature by toggling on **Auto log calls** in **Setting**. There's a 20-second countdown behind the **Save** button when a call ends. If you don't make any changes during the countdown, the call will be logged automatically when the time is up (Figure 20).

- If the call has a single match, it will be logged automatically under the single match.
- If the call has multiple matches, it will be logged under the last modified matched contact record. The app will log to the last modified matched company if there's no matched contact.
- If the call has no match, the app will create a new contact named "Caller + phone number in e164 format" and log the call under the new contact.
- If the call is Anonymous, the app will create a new contact named "Anonymous" and log the call under the new contact. All anonymous calls will be logged under this contact afterward.

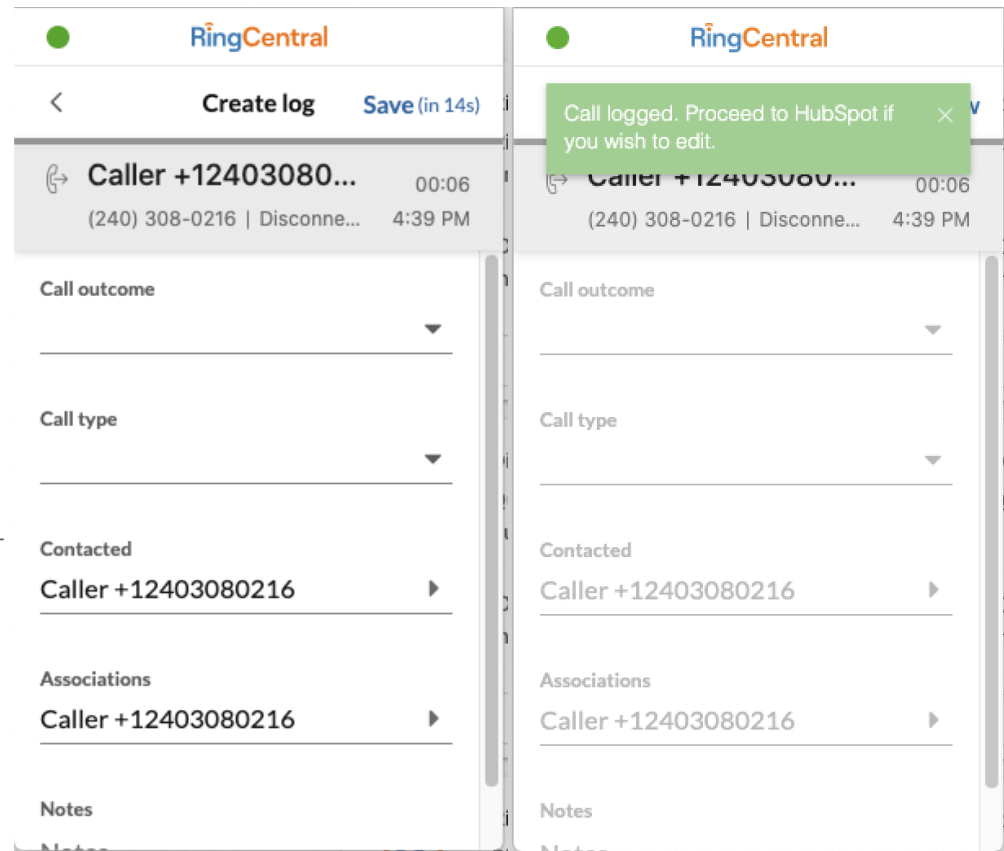


Figure 20

You can make changes on the call logs with the auto logging feature enabled. If you made these changes before the call ends, the app will remember your choices and log them automatically into HubSpot after the countdown. However, if you make the changes after the call ends, the timer will disappear, and the auto log will be stopped for the call (Figure 21). You will need to select at least one association as needed and click on the **Save** button to log the call manually.

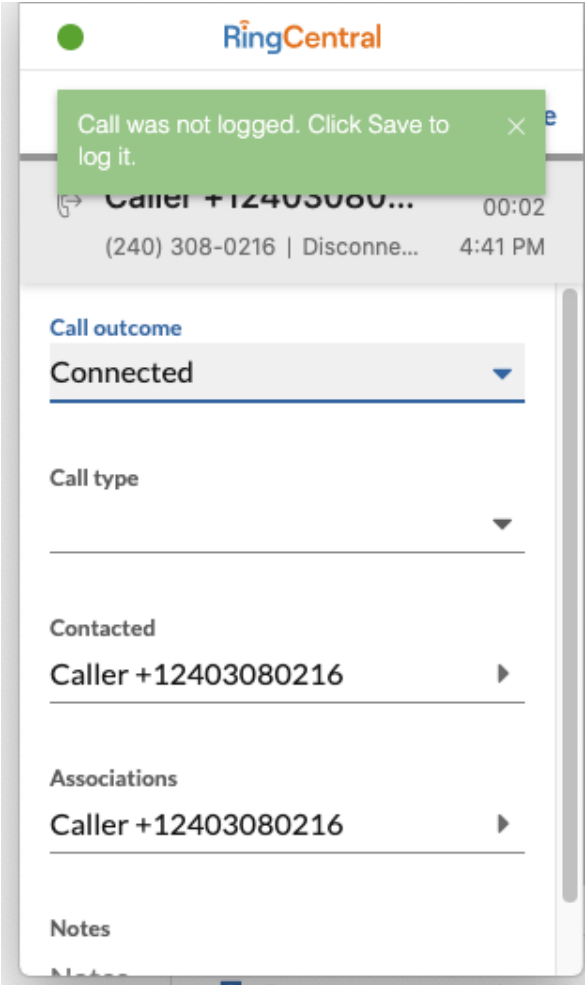


Figure 21

Call history

You can navigate to the call history page by clicking on the **History** icon (Figure 22, step 5). You will be able to view call histories up to 250 maximum for the past seven days and do the following actions:

- (1) **Call back**: Call the phone number in the record with one click.
- (2) **View log details**: If a call is logged successfully, you can click this button to prompt the corresponding log stored in HubSpot.
- (3) **Resume log**: If you have edited something on a call but have not generated a log, the call will be stored as a draft in RingCentral for HubSpot app. Click the resume icon to retrieve your draft and continue working in the **Create call log** page.
- (4) **Create log**: Opens the **Create call log** page, so you can start editing and logging an unsaved call.

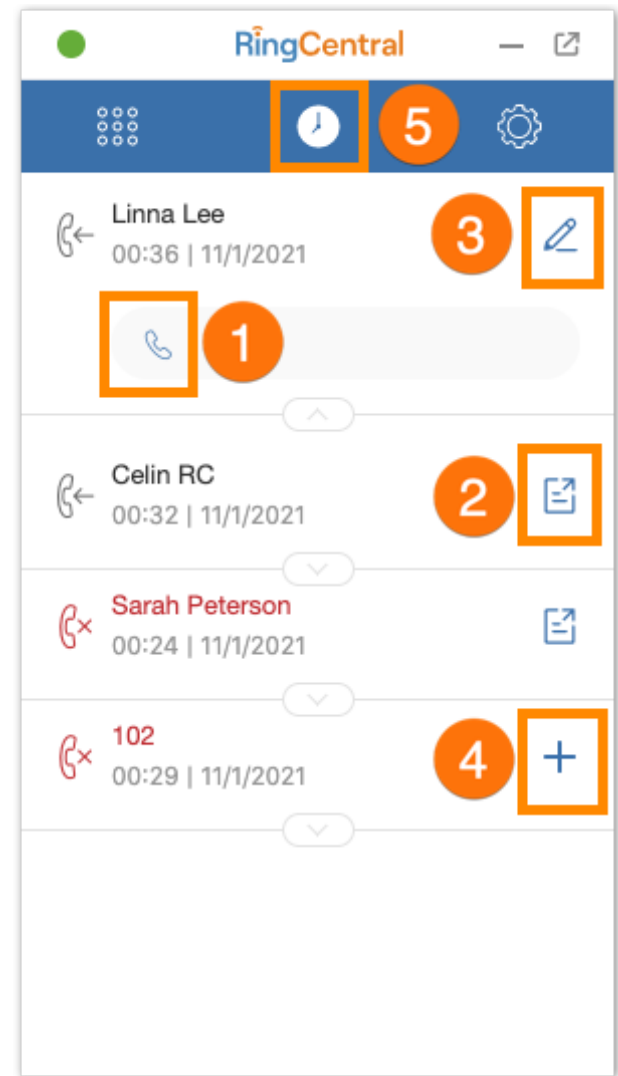


Figure 22

Message hub

The message hub holds all information and features you need for messages, voicemails, and faxes. You can click on the **Messages hub** icon (Figure 23, step 1) to navigate to the message hub. There are four tabs in the message hub: **All**, **Voice**, **Fax**, and **Text**.

The application displays the message history of the past seven days with a maximum of 250 texts, 100 voicemails, and 100 faxes. You may notice red numbers (Figure 23, step 2) on the top right corner of the **Messages** icon, **Voice** tab, **Fax** tab, and **Text** tab. These numbers count your unread messages.

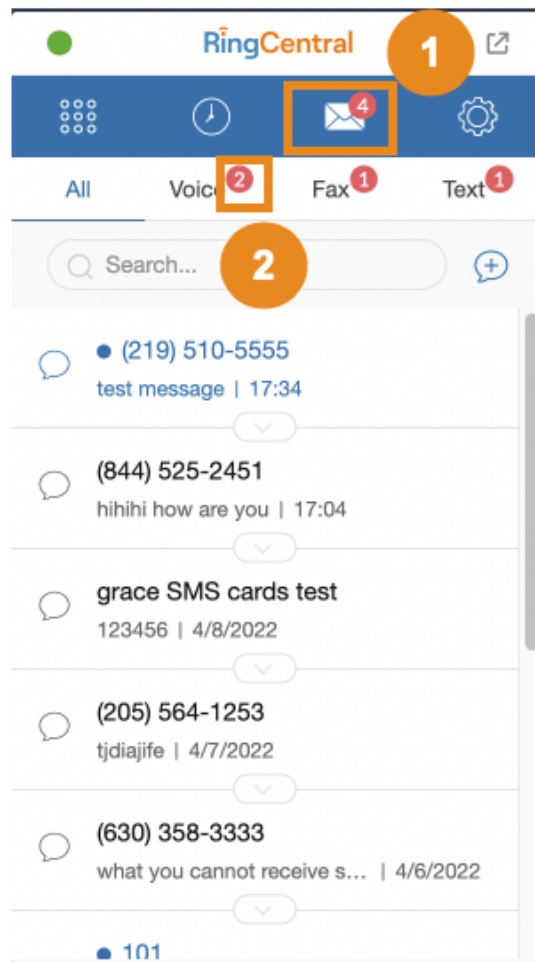


Figure 23

Voicemail Tab

In the **Voicemail** tab, you can take actions related to voicemail (Figure 24):

- (1) **Search:** Search voicemail by phone number or matched association's name.
- (2) **Play:** Play a voicemail.
- (3) **Download:** Download this voicemail.
- (4) **Unread:** The blue dot indicates that you haven't listened to the voicemail. It disappears once you play the voicemail.
- (5) **Fold/Collapse:** Fold or collapse the action button section for this voicemail.
- (6) **Call:** Call the person who sent you this voicemail.
- (7) **Text:** Text the person who sent you this voicemail.
- (8) **Mark as Read/Unread:** Flag the voicemail as read or unread by the blue dot.
- (9) **Delete:** Delete this voicemail.



Figure 24

Fax Tab

In the Fax tab, you can take actions related to Fax (Figure 25):

- (1) **Search:** Search fax by phone number or matched association's name.
- (2) **Inbound direction:** Indicate this is inbound fax.
- (3) **Fold/Collapse:** Fold or collapse the action button section for this fax.
- (4) **Mark as read/unread:** Flag the fax as read or unread by the blue dot. Only inbound fax has this action.
- (5) **Outbound direction:** Indicate this is an outbound fax.
- (6) **View:** View the fax details in a new browser tab.
- (7) **Download:** Download this fax.
- (8) **Delete:** Delete this fax.

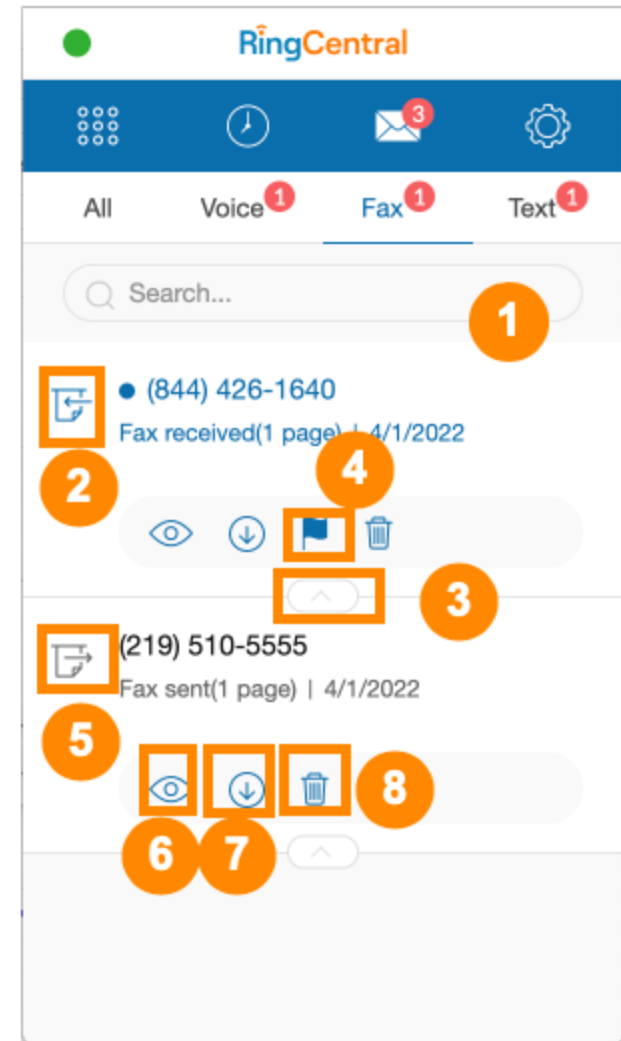


Figure 25

Text Tab

In the Text tab, you can take actions related to texts (Figure 26):

- (1) **Unread**: The blue dot indicates that there is an unread text(s). Click it to view it in the detailed conversation screen (Figure 26, step 6).
- (2) **Fold/Collapse**: Fold or collapse the action button section for this text.
- (3) **Call**: Call the person who sent you this text.
- (4) **New conversation**: Go to the compose page to create a new conversation (Figure 27).
- (5) **Search**: Search a text by phone number or matched association's name or contents.
- (6) **View conversation**: Go to the compose page to see the full conversation with this person (Figure 27). You can continue the conversation on the compose page as needed.
- (7) **Create new log/Draft/View log detail** (Figure 26, step 7): Click to create new SMS logs, continue editing drafts, or open the logged SMS in HubSpot, based on the logging states.

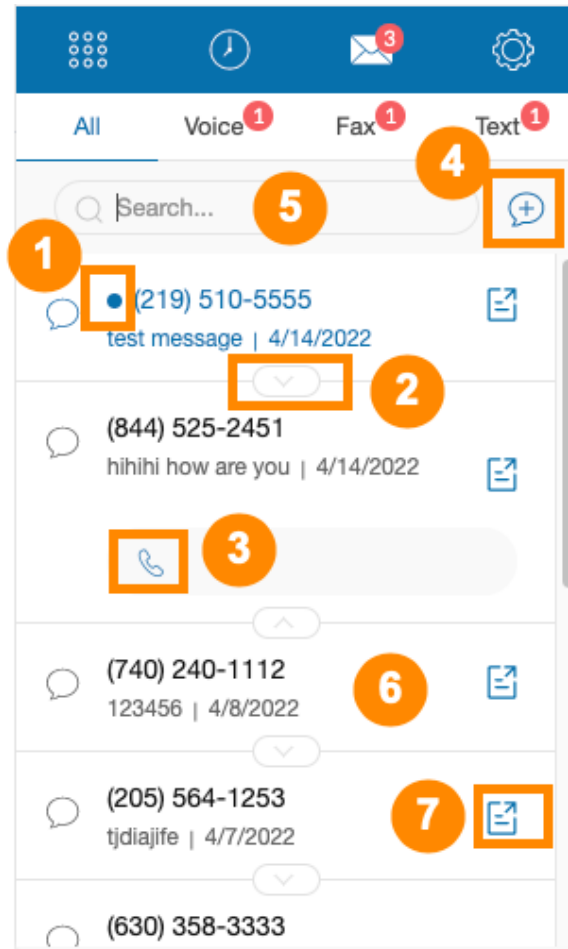


Figure 26

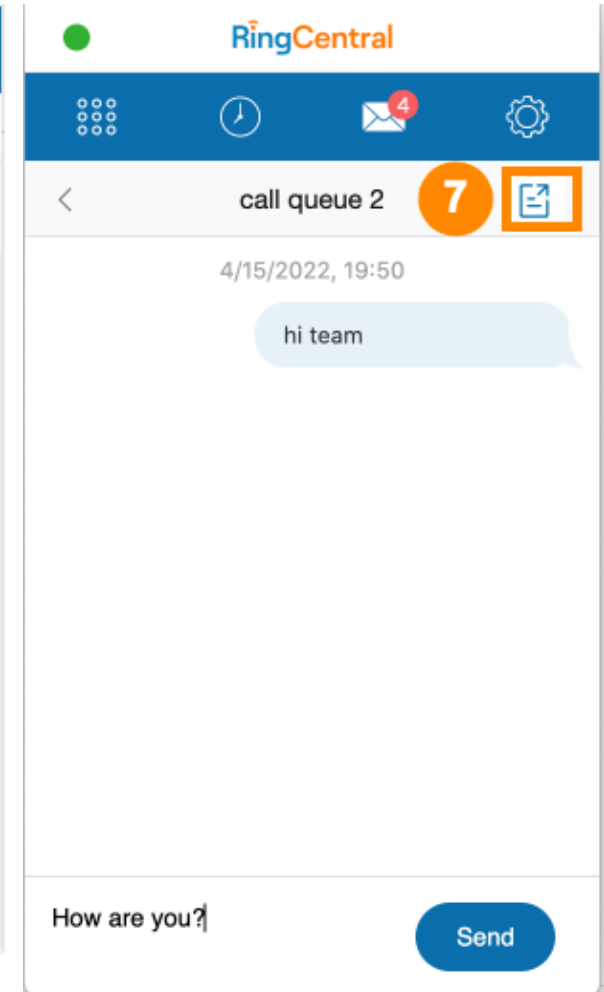


Figure 27

In the compose page, you can add one or multiple SMS recipient(s) in the **To** field (Figure 28, step 1). You can search in the **To** field by phone number or name as in the call dial pad (Figures 9 and 10). If you have multiple phone numbers associated with your RingCentral account, you can choose in the **From** field by clicking the dropdown (Figure 28, step 2). After you enter the text content, the **Send** button (Figure 28, step 3) will be enabled.

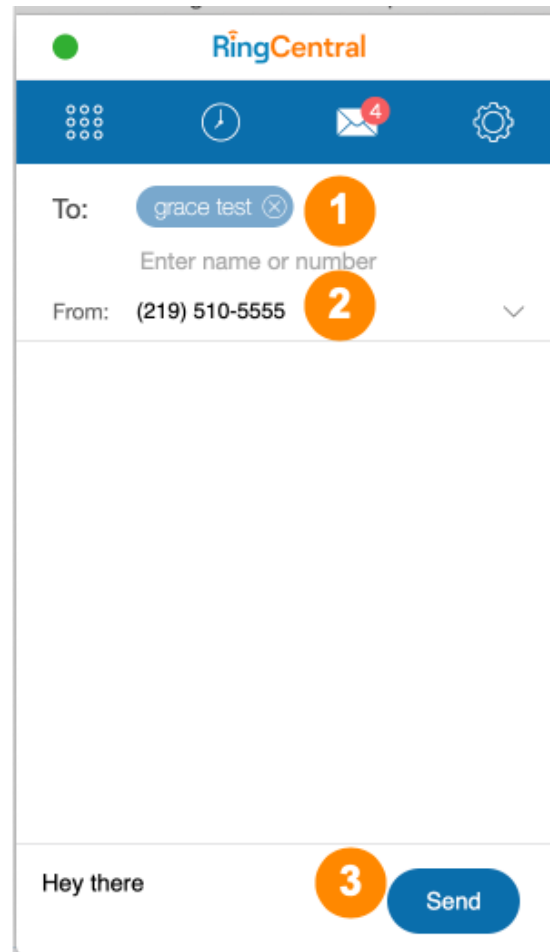


Figure 28

All tab

The **All** tab displays the history of your voicemail, fax, and text message with the same actions and features as the other three tabs (Figure 29).

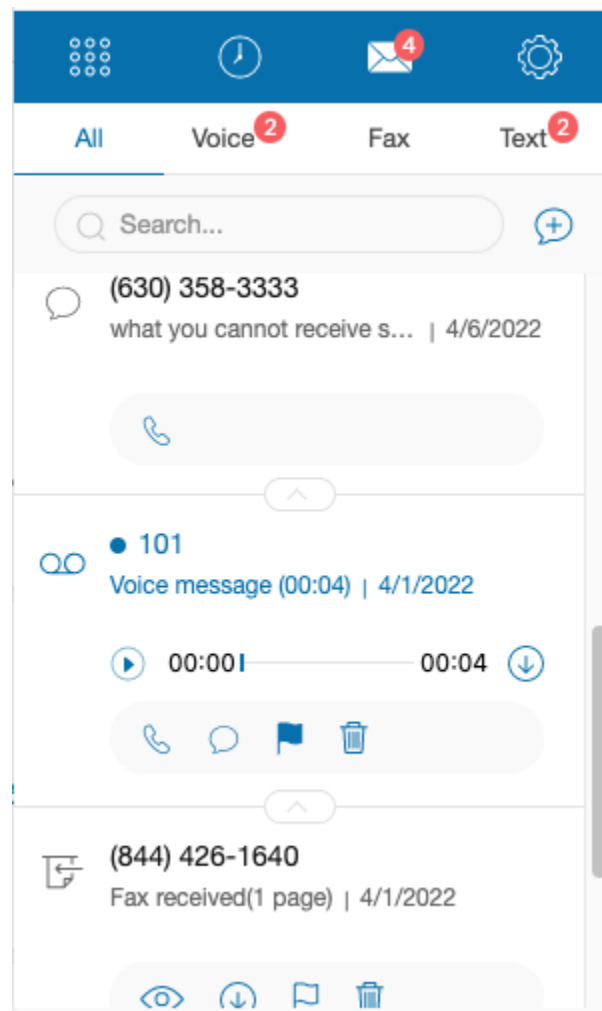


Figure 29

Log texts

Manual log texts

When there is an unlogged text in a conversation, the Create log icon (Figure 30, step 1) will be available on the **All** tab, **Text** tab, or conversation page (Figure 27). You can click on it to open the Create log page for logging SMS.

You'll see all matched contacts, companies, deals, or tickets on the **Create log** page. You can also search for any existing HubSpot contacts in the searching bar (Figure 30, step 4) as needed. The search bar in SMS logging works the same way as in call logging (Figure 18).

The **Save** button is enabled when at least one record is selected in the **Create log** page (Figure 30, step 2). Click the **Save** button (Figure 30, step 3) then the app will save the unlogged texts (50 SMS in the past seven days maximum) to the selected records(s) in HubSpot. You can choose up to three records to log a conversation.

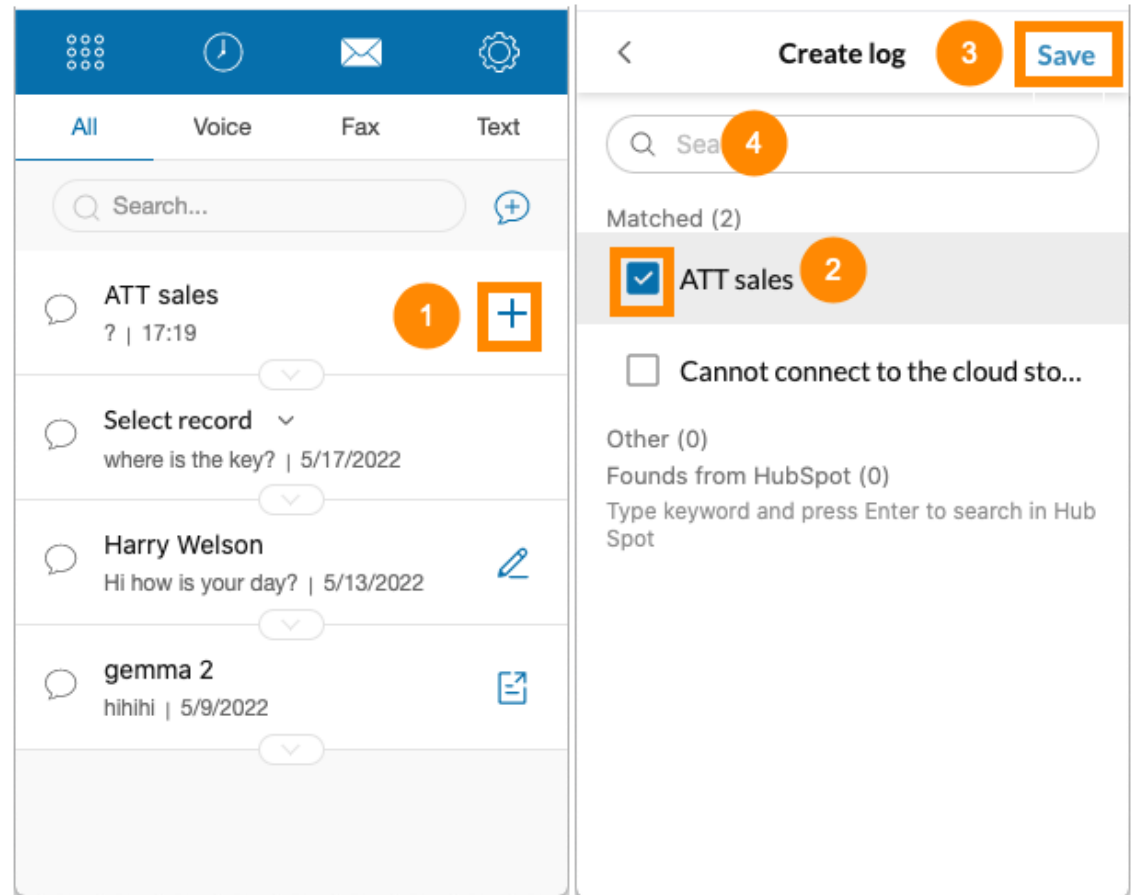


Figure 30

Once the logging is completed, you can open the corresponding record in HubSpot by clicking the **View log details** icon (Figure 31, step 1) in the **Text** tab, **All** tab, or conversation page. If you make changes on the **Create log** page but don't click the **Save** button, the app will remember your changes as drafts (Figure 31, step 2), so you can continue editing the log afterward. When a new SMS is received or sent, the **View log details** or **Draft** icon will be replaced by the **Create log** icon (Figure 30, step 1). You can log the new text(s) again as needed.

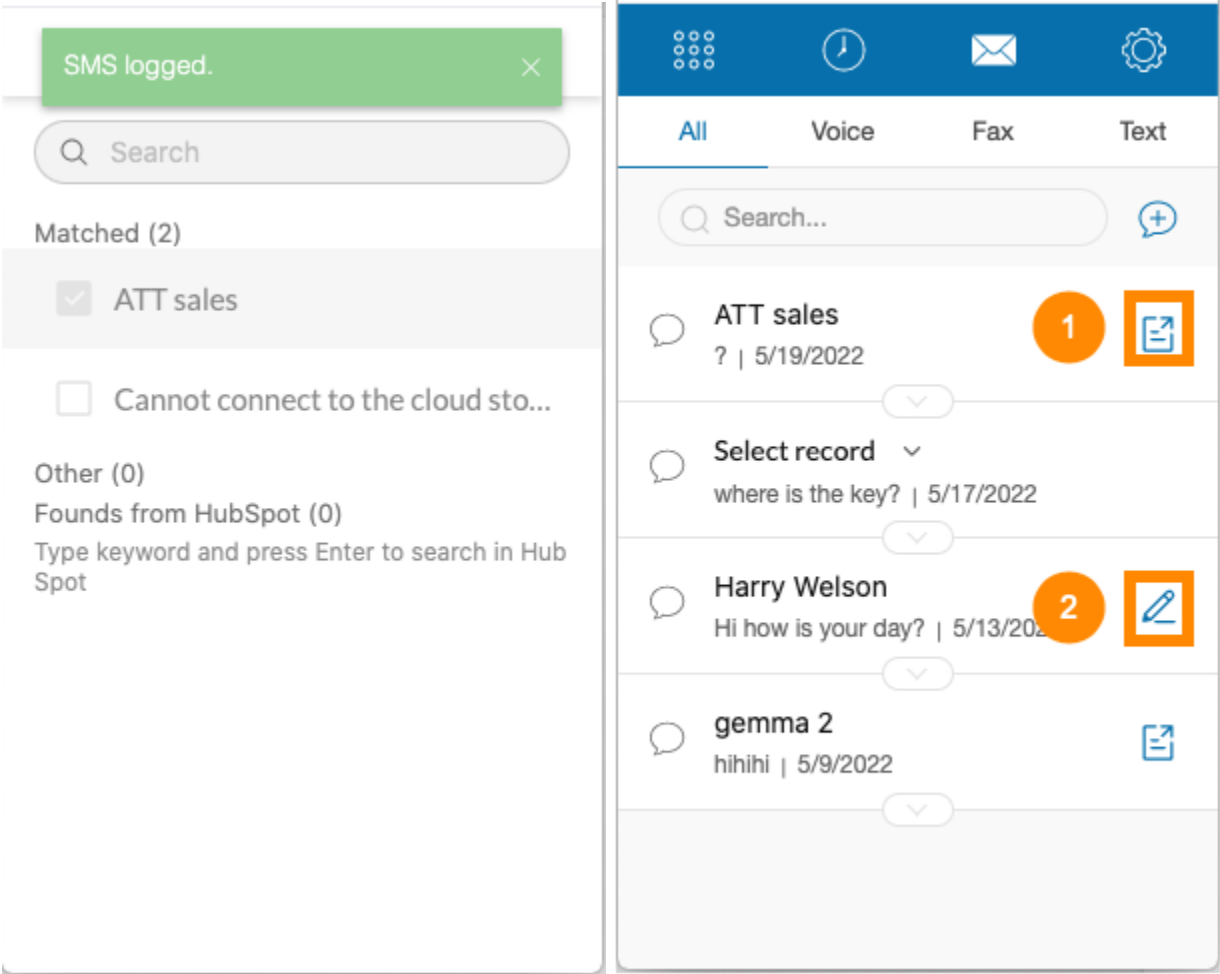


Figure 31

Each SMS will be logged as a custom timeline event in the HubSpot activity section, displayed by descended SMS received/sent date (Figure 32). Note that you cannot edit a custom timeline event.

The screenshot displays the HubSpot interface for a contact named 'ATT sales'. On the left, the contact's profile includes a circular avatar with the initials 'AS', a row of communication icons (email, phone, etc.), and sections for 'About this contact', 'Communication subscriptions', and 'Website activity'. The 'Communication subscriptions' section indicates that the contact receives communications from the user. The 'Website activity' section explains that it tracks site visits and page views.

The main area on the right shows the 'Activity' tab for this contact. It features a filter set to 'Filter activity (2/36)' and 'All users'. The activity is dated 'May 2022' and lists three outgoing SMS messages from 'RingCentral for HubSpot Dev' to 'ATT sales(+16507614232)'. The messages are as follows:

- Message 1:** Sent on May 19, 2022 at 17:19 GMT+8. Content: "May 19, 2022 05:19 PM: [Outbound] SMS from ** (+12195105555)** to ATT sales(+16507614232) ?"
- Message 2:** Sent on May 19, 2022 at 17:16 GMT+8. Content: "May 19, 2022 05:16 PM: [Outbound] SMS from ** (+12195105555)** to ATT sales(+16507614232) Did you get my message?"
- Message 3:** Sent on May 17, 2022 at 11:00 GMT+8. Content: "May 17, 2022 11:00 AM: [Outbound] SMS from ** (+12195105555)** to dial test2 (+16507614232) heya"

Figure 32

If you don't see the logged texts in the corresponding HubSpot record, click the Filter activity (Figure 33, step1) and select RingCentral for HubSpot (Figure 33, step2).

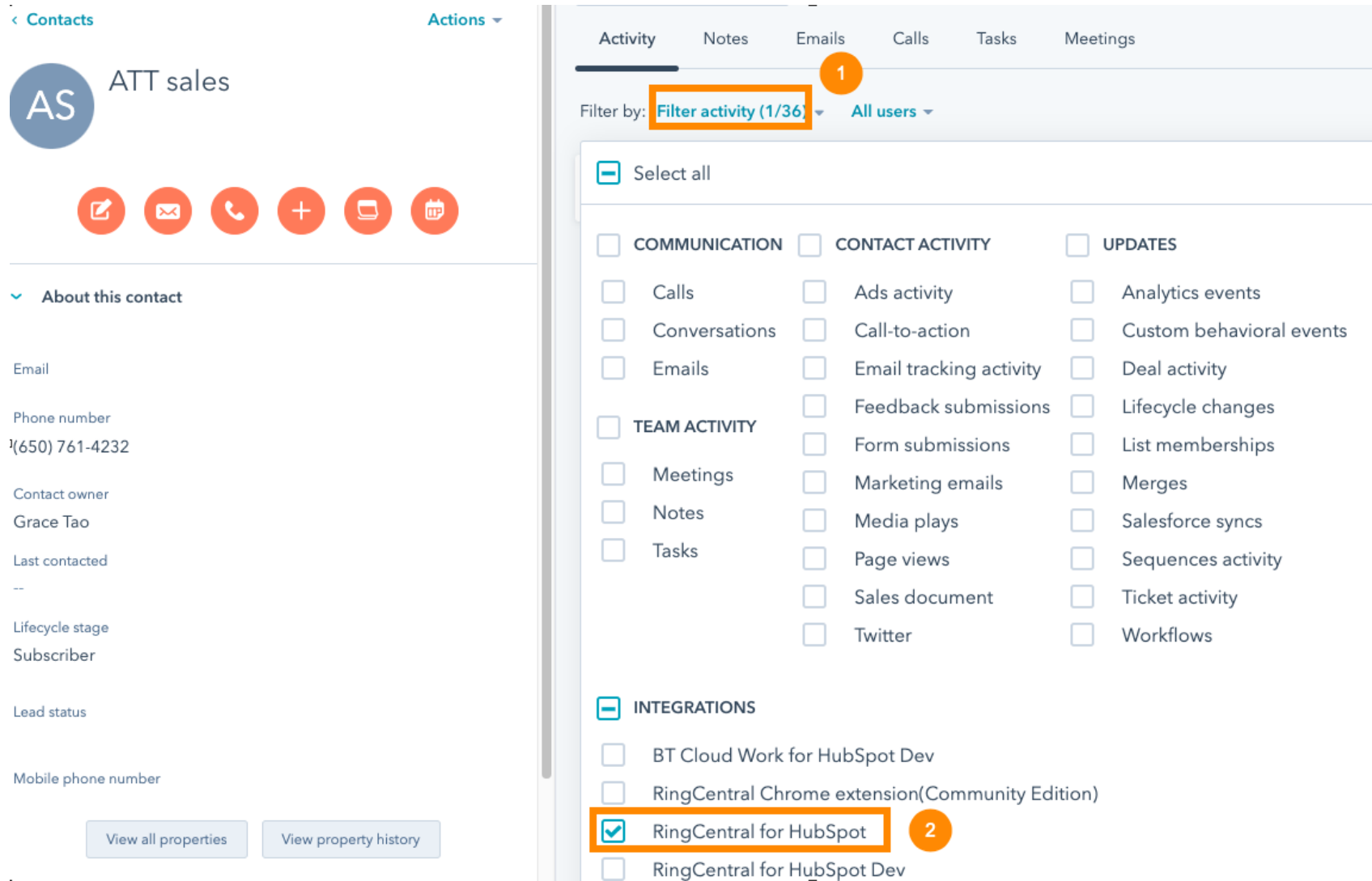


Figure 33

Auto log texts

RingCentral for HubSpot supports logging SMS automatically to your HubSpot even if you are offline from this app. You can toggle on **Auto log texts** to allow auto SMS logging (Figure 34, step 1). All SMS received or sent out after the toggle is on will be logged to HubSpot automatically by the app. Note that you cannot manually log an SMS conversation when the toggle is on, and the **Create log** (Figure 34, step 2) and **Continue editing** (Figure 34, step 3) buttons will be hidden. The **View log details** button will remain if the SMS conversation has SMS info (Figure 34, step 4).

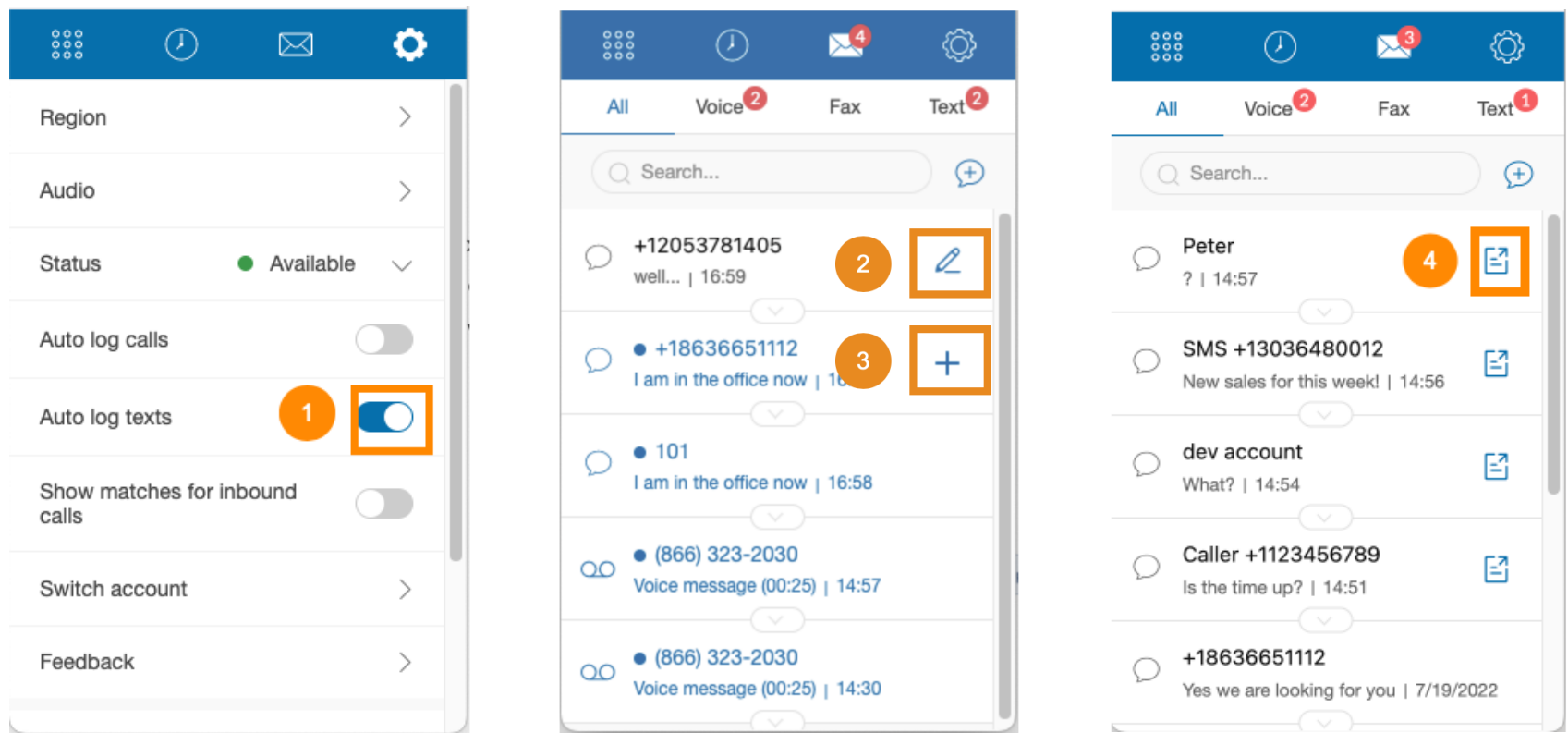


Figure34

If a conversation has been logged before, the new SMS will be logged to the previously logged records. If a conversation hasn't been logged before, the app will log based on the contact matching result:

- No matched record: The app will create a new contact record with the name "SMS phone number" and log the SMS to the new record (Figure 35, step 1).
- Single match: the app will log the new SMS to the only matched record (Figure 35, step 2).
- Multiple match: the app will log the SMS to the last modified matched contact record. If there is no matched contact record, the app will log the SMS to the last modified company (Figure 35, step2).

Usually, a new SMS should be logged **within 10 minutes**. You can click on the **View log details** button to check the SMS log in HubSpot (Figure 35, step3). If an SMS fails to be logged, the app will retry 11 times at different moments in the next 36 hours. For more details, please see the General Question section.

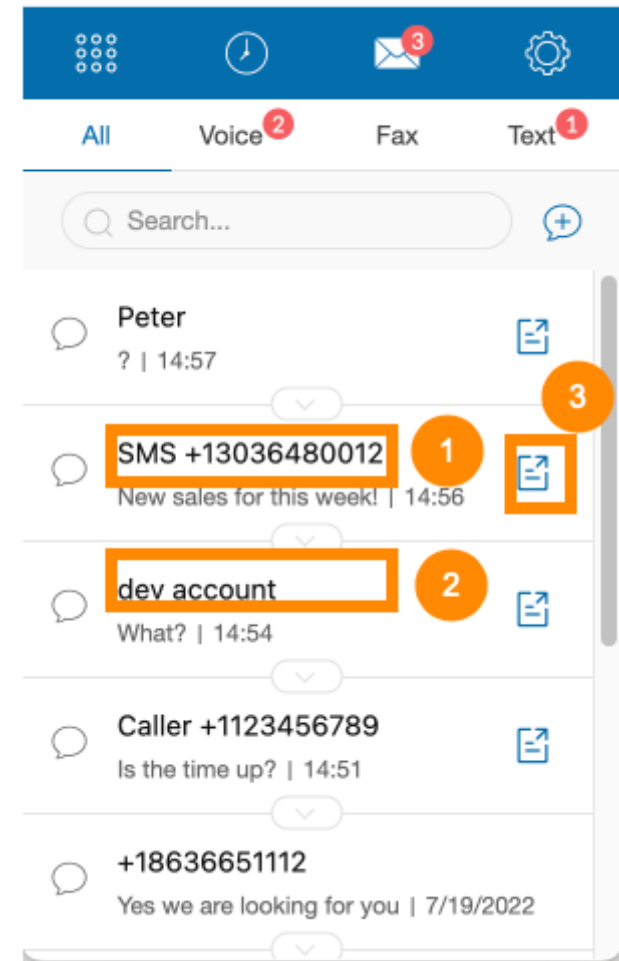


Figure 35

If you are unhappy with the log-to record selected by the app, you can override it by expanding the action section and clicking on the Add text log button (Figure 36, step 1). You can see all matched associations (contact, company, deal and ticket) and select different or more records (Figure 36, step 2) as needed. You can also search for existing HubSpot contacts and select it (Figure 36, step 3). After you make the change, click the Save button (Figure 36, step 4) to commit it. If you see the message (Figure 36, step 5) afterwards, the app will auto log all SMS after auto log is on or all SMS in the past seven days (whichever is smaller) to the new associations within 10 mins.

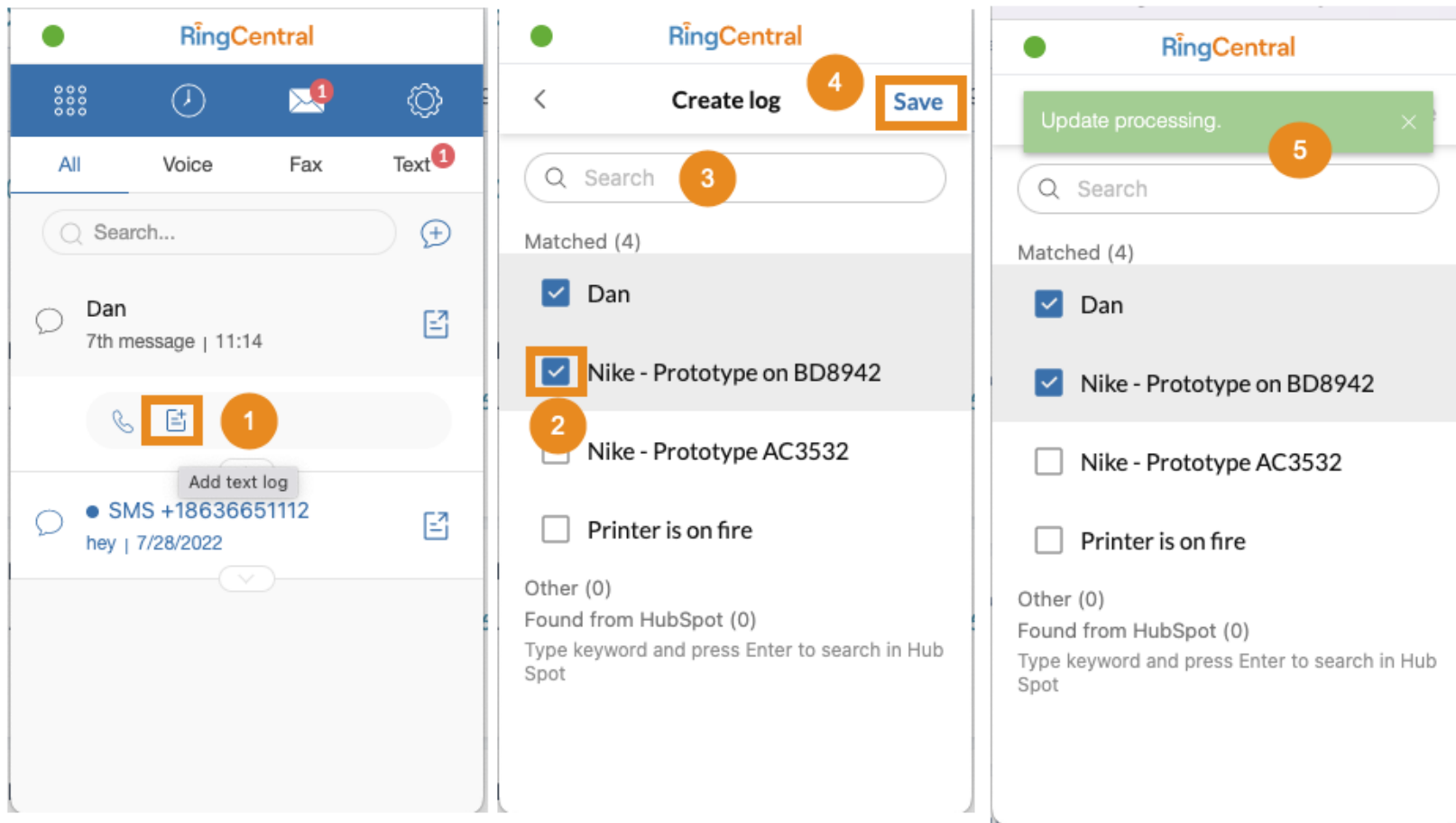


Figure 36

Workflow

HubSpot Workflow allows users to automate the business process by setting up enrollment criteria to enroll records and take actions on enrolled records. RingCentral for HubSpot provides a contact-based workflow action **Send text message (SMS)**, enabling a workflow to send text messages to enrolled contacts via RingCentral for HubSpot app. These messages can be logged manually or automatically based on your app setting.

You can find Workflows in your HubSpot **Automation > Workflows** (Figure 37). For more details on how to set up a workflow, read [Create workflows](#).

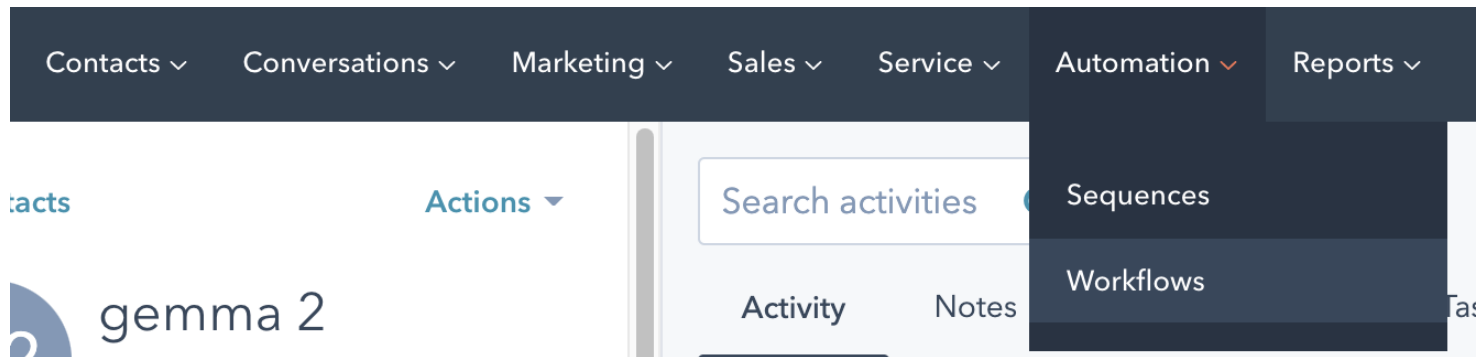


Figure 37

Send text message (SMS) is a custom contact based workflow action. You can find it in the HubSpot workflow action section (Figure 38).

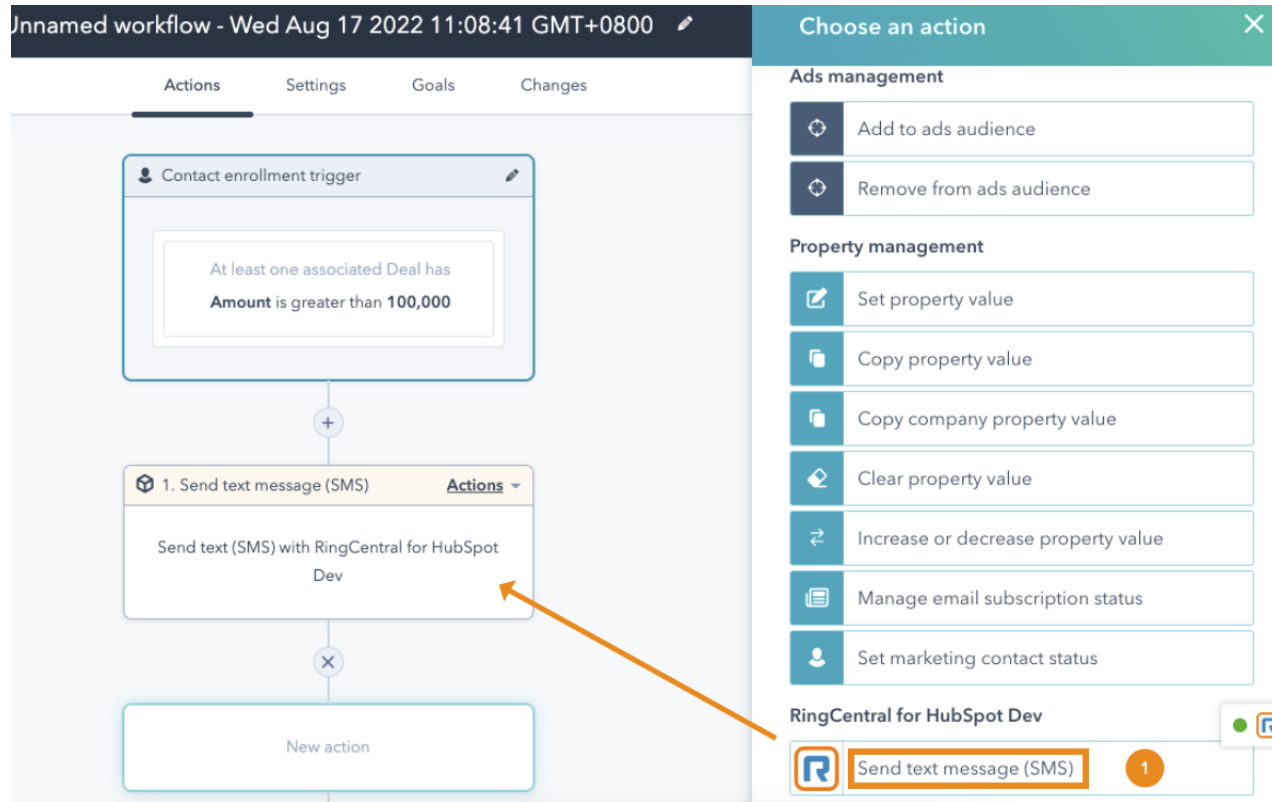


Figure 38

When you add this action to your workflow, you can configure:

- (1) Send text to: Define the phone number to send a message to (Figure 39, step 1). Usually choose the contact records' phone number field and/or mobile phone number field.
- (2) Message: Define the SMS content (Figure 39, step 2).

Note: The workflow always sends the SMS from the contact owner's phone number. Therefore please ensure the contact owner has a valid RC account (the same email address to sign in both HubSpot and RingCentral), and is able to sign in to RingCentral for HubSpot, so that Send text message (SMS) action will work properly.

Using the example in Figure 39, the workflow will enroll a contact record with its deal amount over 100,000 and send SMS to the enrolled contact automatically. Let us say a contact Dean Porter has a deal with an amount of 150,000 and the contact owner for Dean is Grace Tao. Dean will see a message sent from Grace Porter’s RC number to his phone number with the content “Hi Dean Porter, one of our specialists will reach out to you soon for the deal. Have a nice day!”. The workflow uses Grace’s RC account to send the SMS as if Grace does it by herself. Please ensure the contact owner (Grace Tao in this case) has a valid RC account and is able to sign in RingCentral for HubSpot.

Named workflow - Wed Aug 17 2022 10:39:53 GMT+0800

ActionsSettingsGoalsChanges

Contact enrollment trigger

At least one associated Deal has
Amount is greater than 100,000

+

1. Send text message (SMS)

Send text (SMS) with RingCentral for HubSpot Dev

1. Send text message (SMS)

Edit actionContacts in action

Complete these fields to send a text message (SMS) using RingCentral for HubSpot Dev.

Send text to

1 Phone number

Message

2 Hi

First name

Last name

, one of our specialist will reach out to you soon for the deal. Have a nice day!!

< ContactsActions

R

Dean Porter

RingCentral

dean.chen@ringcentral.com

About this contact

Email
dean.chen@ringcentral.com

Phone number
+1 (650) 437-0830

Contact owner
Grace Tao

Details

Figure 39

Workflow results and errors will be tracked in HubSpot workflow action logs (Figure 40). Read [Understand your workflow details page](#) for more information.

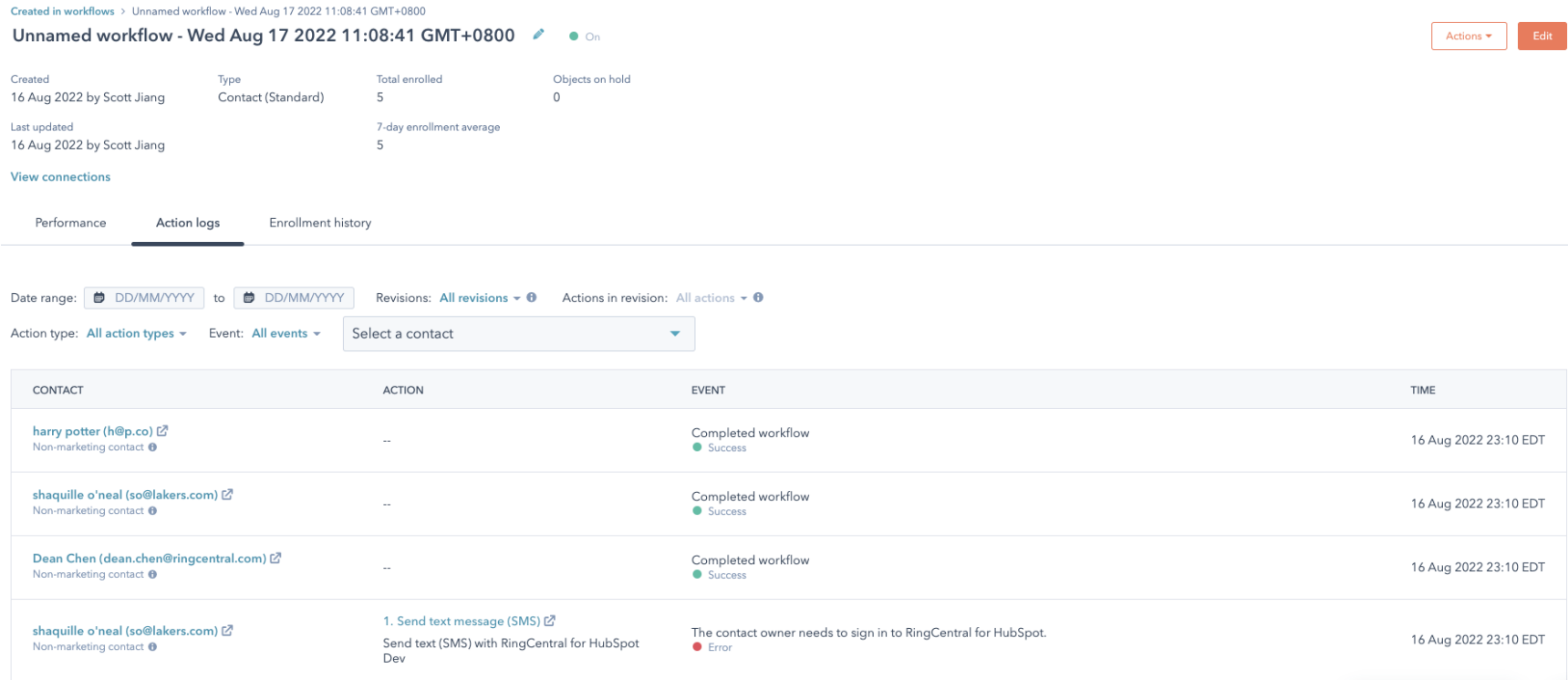


Figure 40

System Requirements

RingCentral for HubSpot System Requirements

- Windows® 7 and above
- Mac OS® X 10.8 Mountain Lion (or later)
- Supported browsers include Chrome™ 69 (or later)
- Chrome extension supports Chrome OS

General Questions

1. I want to install RingCentral for HubSpot and found the app listing in HubSpot marketplace. Why is there no **Install app** button? / Why is the **Install app** button disabled? / Why do I see a **Request to install** button? / Why nothing installed after I clicked through the process?

For installation, please go to [Google marketplace](#) to proceed.

2. Why is there no available hub to log in?

Reach out to your HubSpot administrator to connect the HubSpot account you would like to sign in with RingCentral.

If it has been done, please ensure:

- You have access to the Hub in HubSpot
- You use the the same email to sign in your HubSpot and RingCentral for HubSpot

If you are still not able to log in after verification, please contact RingCentral Support for help.

3. Why is there no call outcome and call type fields in the Create call log page at call logging ?

Ensure the call outcome and call type are enabled and there are options configured for these fields in HubSpot.

4. I have enabled/ updated call outcome/ call type in HubSpot but why are the changes not synced back to RingCentral for HubSpot?

Log out and log in the app to sync the changes.

5. Why do I see the error message “Cannot match contact. Try clicking the Create log icon in your call history.” when I make or pick up a call?

You see this error message when your company hits the rate limit restricted by HubSpot at the specific second.

In this case, the call information will be shown as Unknown because the contact match fails to run due to rate limitation. Therefore, although the call information is displayed as Unknown, there may be matches. You can go back to call history and click on Create call log icon for the call. The contact match will be triggered again to search for matched associations.

6. Why is the call not matched, but the contact exists in my HubSpot?

First, ensure you have signed into the hub where your contacts exist in RingCentral for HubSpot.

Second, RingCentral for HubSpot follows the contact match logic for both national/ international calls. If you make or receive national calls, the company/ contact records with phone number or mobile phone number in any format will be matched. For example, let us say a phone number +16508888888 calls you and there are 4 contacts with phone number saved as +16508888888, 1 (650)-888-8888, 650_888_8888, 6508888888 in your HubSpot .

7. Why can't I find RingCentral for HubSpot after installation?

You can click the **Extension** icon on your Google Chrome browser (Figure 41, step 1) to view all enabled extension apps, including RingCentral for HubSpot. Click to open the app (Figure 41, step 2). You can also click on the pushpin button (Figure 41, step 3) to pin the app to your browser for easy access (Figure 41, step 4) .

However, if you cannot find the app in the enabled extension list, click **Manage Extensions** (Figure 41, step 5). Your app is somehow disabled and you need to enable it. Find RingCentral for HubSpot in Extensions page and turn on the toggle (Figure 42). Approve the prompt if there are (Figure 43) . After refreshing your browser, you will see the app option available as in Figure 43.

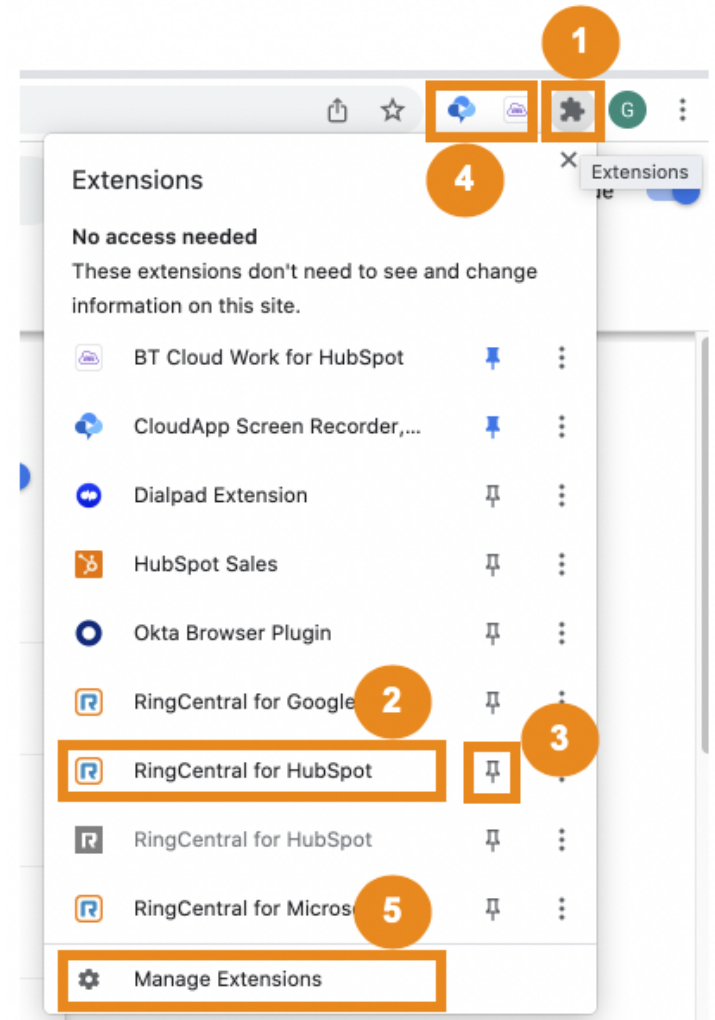


Figure 41

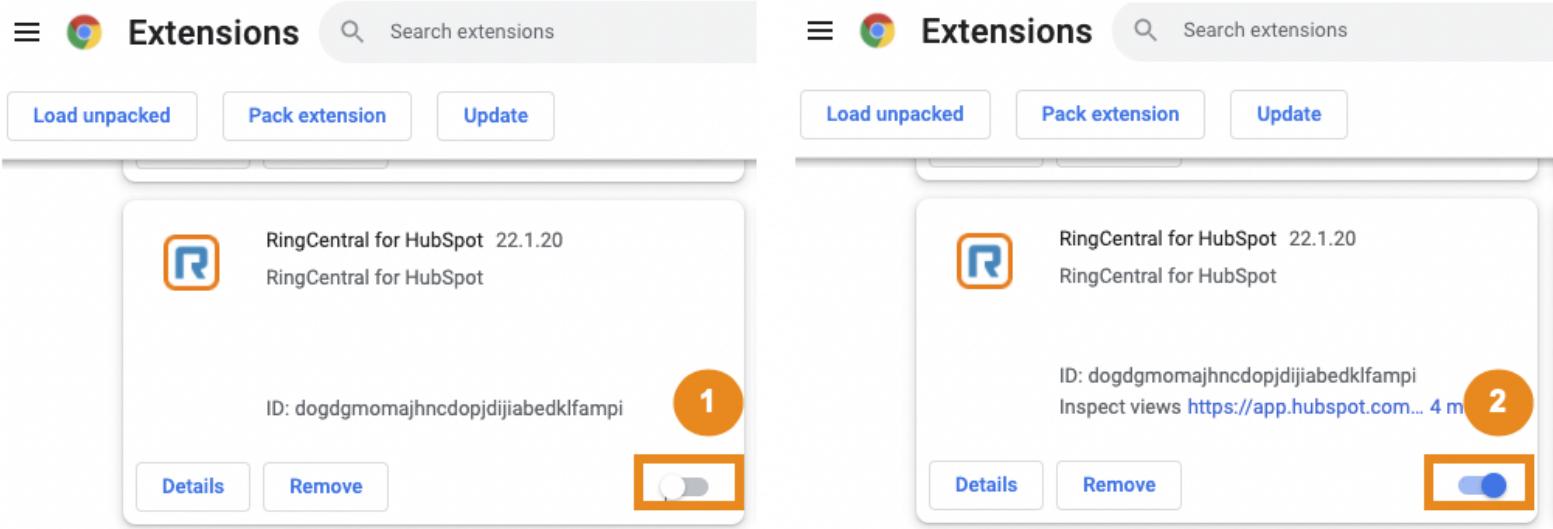


Figure 43

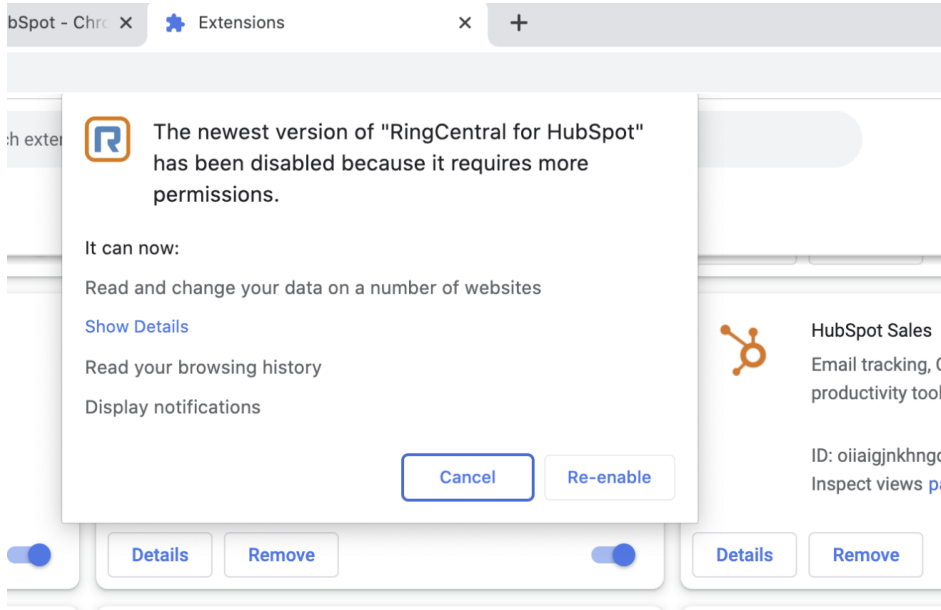


Figure 44

8. Why can't I see the click to dial or click to SMS when I hover on a phone number?

The click to dial/ click to SMS icon shows when you hover on a valid phone number field in the HubSpot CRM. If the icon doesn't show, please change your phone number to E164 format (eg, +18888888888).

9. Why is my SMS not logged automatically?

After you turn on the Auto log texts toggle in Settings, all new texts received or sent afterwards will be logged automatically by the app. The app usually auto logs a new SMS within 10 mins and keeps retrying failed ones. If you don't see your SMS logs in HubSpot, it is more likely that the RingCentral for HubSpot app doesn't display the latest SMS logging status or you are checking a wrong HubSpot record. Please sign out and then sign in the RingCentral for HubSpot app to ensure the app syncs back the latest SMS logging status. Click the View log details icon (Figure 45 step 1) and the app will open the logged record in your HubSpot.

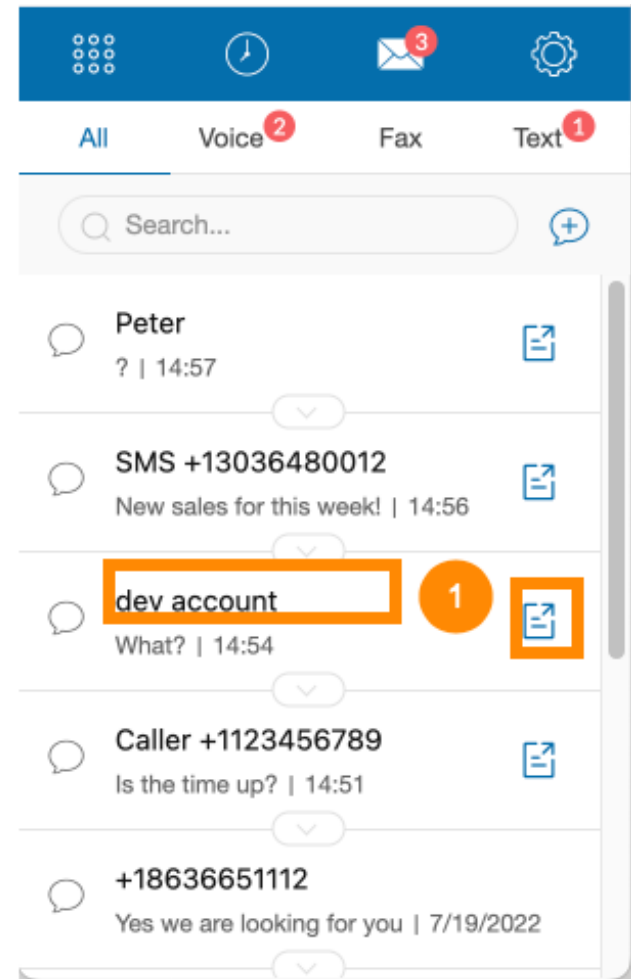


Figure 45

10. What happens if an SMS fails at auto logging?

If an SMS fails to be logged automatically, the app will retry the failed one after 2 mins, then 4 mins, then 8 mins, 16 mins ... until it is logged successfully. If unfortunately the logging keeps failing, the last retry happens about 34 hours later. If the SMS still fails at the last retry, the app will skip logging this text.

Follow question 9 to ensure you are checking the correct HubSpot record for your SMS logs. If you cannot find the SMS log 36 hours after sending or receiving it, the app cannot log this SMS automatically to your HubSpot. You can turn off the Auto log texts toggle in Settings and try manual SMS log as needed. However, with SMS auto logging queuing and retrying mechanism, such failure should rarely happen.

11. I added a new matched contact (or company or deal or ticket) in my HubSpot. Why is the contact match not updated for existing SMS conversation?

Due to the API limit, the app won't rerun contact matches for matched SMS conversation. If there is a need to update contact match results for an existing SMS conversation, please make an outbound call or receive an inbound call with the phone number in the SMS conversation. The app runs contact matches at call connection and the SMS conversation contact match will be updated by reading the call matching result.

For example, you can click on the Call button (Figure 46, step 1) from the SMS action section to make a call. The contact match will be updated at call connection. As long as you see the Create call log page, you can hang up the call and no need to wait for the other side to pick up the call.

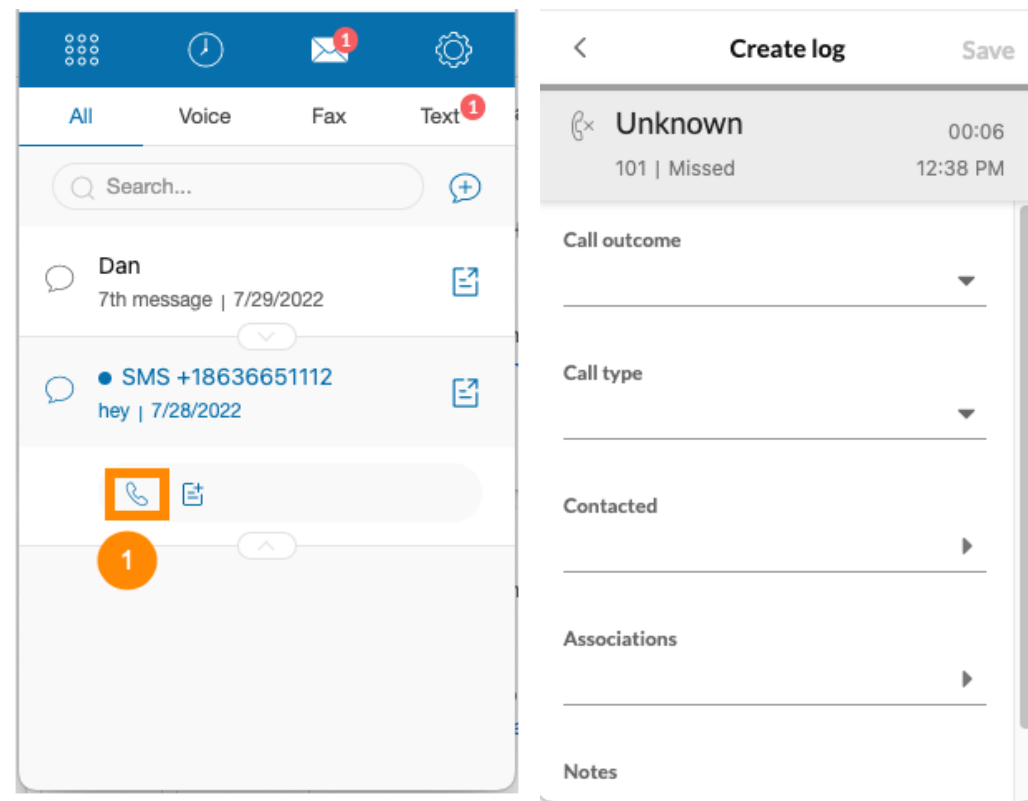


Figure 46