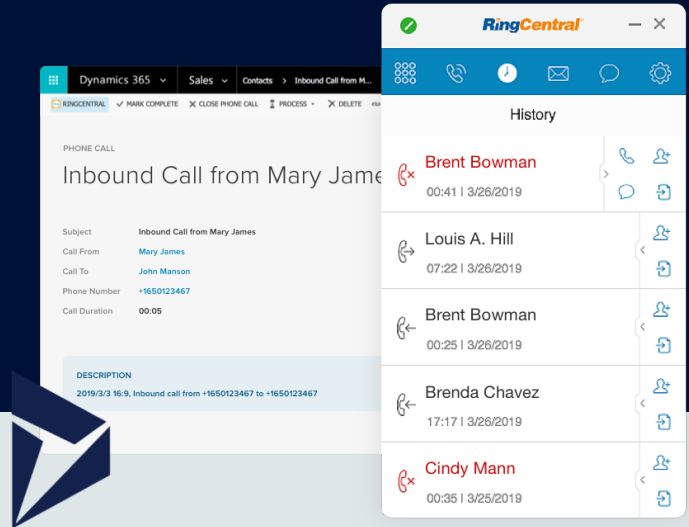


# RINGCENTRAL FOR MICROSOFT DYNAMICS 365



RingCentral for Microsoft Dynamics 365 provides seamless integration between the Microsoft Dynamics CRM and your RingCentral solution.

Improve your sales pipeline by seamlessly integrating your RingCentral cloud communications and collaboration solution into Microsoft Dynamics 365. Enhancing your CRM experience enables you to automate your sales cycle, improve workforce productivity, increase call efficiency, and enhance customer interactions. Automatically match incoming callers to existing

contact records and automatically save notes logged during or after a call with call leads and customers within Dynamics 365. And since it is built on Microsoft's Channel Integration Framework, RingCentral for Dynamics 365 will work across all of your Dynamics 365 apps.

## Features

- **Make and receive calls:** Dial through the RingCentral solution and enjoy enhanced Microsoft Dynamics 365 capabilities across all of your RingCentral devices.
- **Click-to-call and SMS:** Place calls and send texts from within Dynamics 365 by clicking on the hyperlinked number within contact cards, saving time and improving call efficiency.
- **Screen pops:** Callers' account records and contact histories are automatically displayed for all incoming calls so your team is always equipped for quality interactions.
- **Automatic call logging:** Seamlessly log all call and SMS history and notes so your team never misses an important interaction.
- **Message hub:** Access all RingCentral text messages, voicemails, and faxes from one place. Initiate calls, SMS messages, a new call log, entity types (Accounts, Leads, Contacts), and much more from this view.
- **Active call controls:** Quickly mute, transfer, hold, and hang up from within the widget.
- **Create new records:** Easily create new accounts, contacts, or leads while on an active call.
- **Settings:** Set your presence across all RingCentral endpoints, enable automatic log notes, calls, SMS, SMS content, and matched entities on inbound calls, and configure in-app preferences.

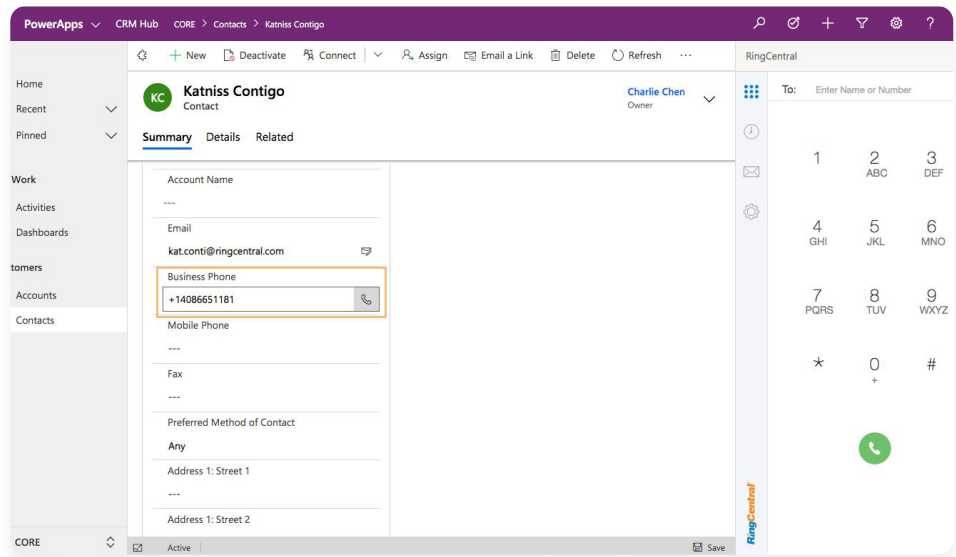
## Benefits

- **Seamless integration with Dynamics 365:** Connecting your RingCentral solution with the CRM applications you use every day allows you to automate the tedious tasks in your workflow for added efficiency and ease of use.
- **Streamlined business communications:** RingCentral for Dynamics 365 reduces the need for agents to switch between multiple devices and applications to access key business functionalities.
- **Exceptional customer experiences:** Intuitive displays of key customer information allows agents to deliver a highly personalized customer experience with every incoming call. Eliminate misdials and speed up response times with easy-access click-to-call phone numbers from any customer or account.

## HOW IT WORKS

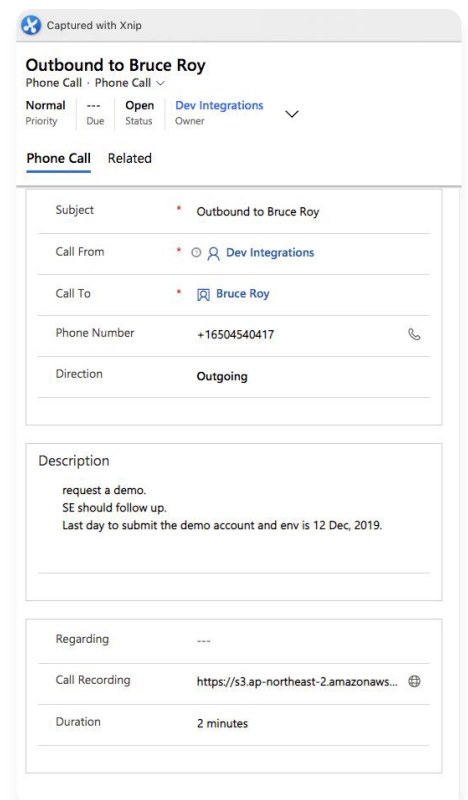
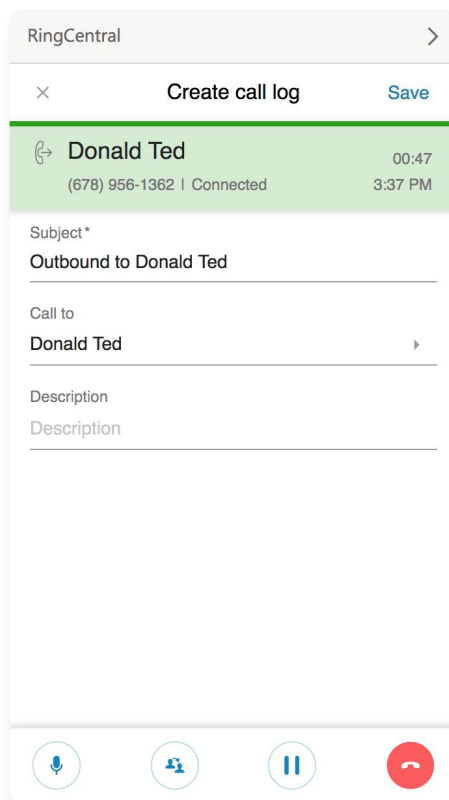
### Click-to-call

Make calls directly from within Dynamics 365 by clicking on the hyperlinked number in contact cards, saving time and completely eliminating misdials.



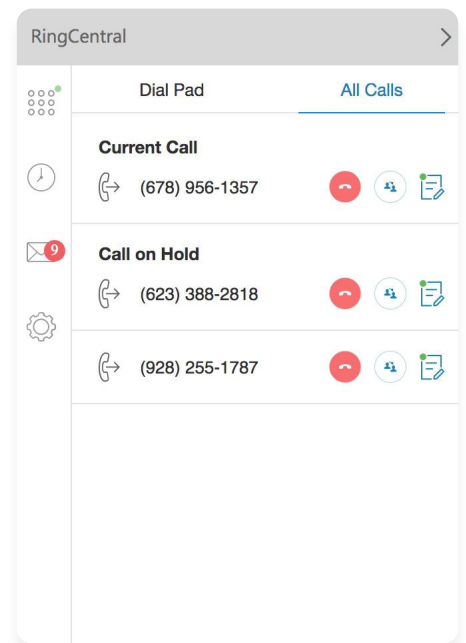
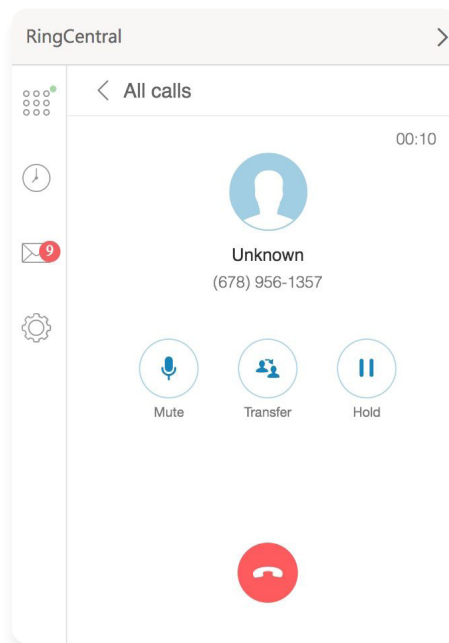
### Screen pop

Always have the right information at your fingertips for inbound calls. With the RingCentral for Dynamics 365 screen pop, you can view all relevant account information and take notes. Automatic call and SMS logging makes organizing your interactions painless. Call recordings can be saved to call logs and logged in to a new phone call activity within Dynamics 365.



## Active call controls

Quickly mute, hold, transfer, record, hang up, and log calls from the dial pad or **All Calls** section in the widget.

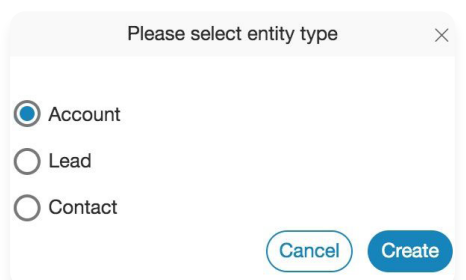
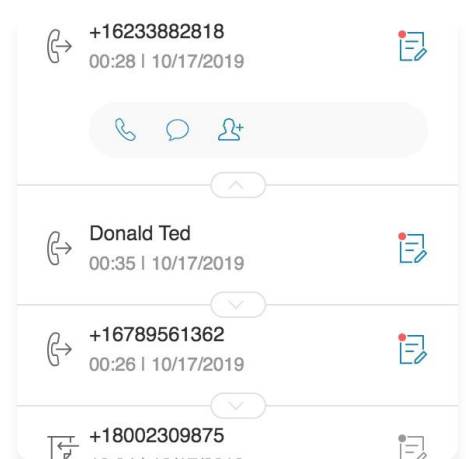
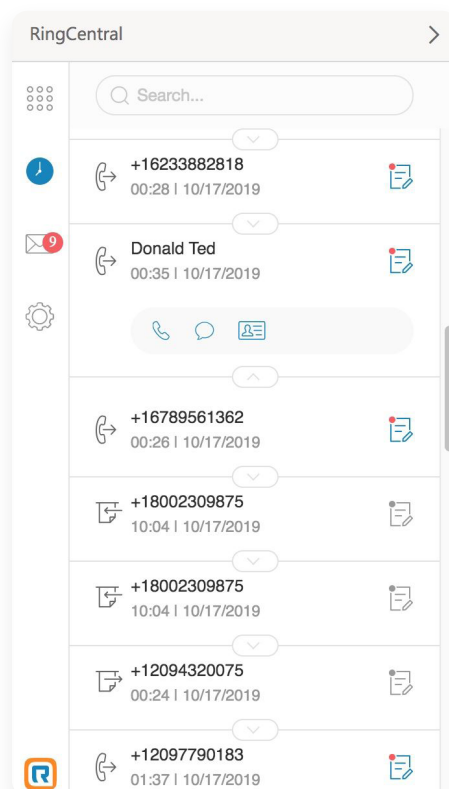


## Call history

Access all historical inbound and outbound calls, voicemails, and faxes from one view. Quickly call, message, or view the contact card of your contact and log missed calls directly from the call history tab so you or your team never miss an important interaction. Create a new entity type in Dynamics by hitting the **Add New** icon and choose from Account, Lead, or Contact.

## System requirements

- RingCentral Office® Premium or Ultimate editions
- Dynamics 365 (online) version 9.1 and higher versions
- Browsers: Google Chrome (recommended: version 69 or later) or Microsoft Edge.



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

RingCentral, Inc. (NYSE: RNG) is a leading provider of global enterprise cloud communications, collaboration, and contact center solutions. More flexible and cost-effective than legacy on-premises systems, the RingCentral platform empowers employees to work better together from any location, on any device, and via any mode to serve customers, improving business efficiency and customer satisfaction. The company provides unified voice, video meetings, team messaging, digital customer engagement, and integrated contact center solutions for enterprises globally. RingCentral's open platform integrates with leading business apps and enables customers to easily customize business workflows. RingCentral is headquartered in Belmont, California, and has offices around the world.