

Set Up Click to Dial



salesnexus

www.salesnexus.com

Chat with Us Here!

You must first set up a **Ring Central account**. You can select the link “need an account” in the Ring Central Settings to be directed to set up a new account.

Getting Click to Dial set up in SalesNexus

- 1) Logon to your SalesNexus Database and navigate to “Settings” menu
- 2) Select Ring Central Settings

Ring Central Settings

Ring Central Settings [Need an account?](#)

Calling From:

User Name:

Extension:

Password:

Caller ID Number:

Prompt: 

3) Fill out the form as follows:

Ring Central Settings

Ring Central Settings [Need an account?](#)

Calling From: Ring Central Number here (no dashes or parentheses - number only)

User Name: Ring Central Number here (no dashes or parentheses - number only)

Extension: Your Extension

Password: Your Ring Central Password

Caller ID Number: Ring Central Number here (no dashes or parentheses - number only)

Prompt: Yes

Save

Prompt: If you want to be asked by RingCentral through the VOIP phone before a call is made select yes, if you want call to be made immediately select no. YES is the default.

4) Click Save

You are now ready to begin using Click to Dial from your SalesNexus database.

The following page will walk you through the call steps.

Making a Call

- 1) Select a contact you would like to call

TEST CONTACT

SalesNexus (make lookup)

Schedule Add Note Add Opportunities

← → Tag

Phone Number [call](#)
(123) 4567890

Log Call with Note Log Call as: Completed Attempted Left Message

Email
test@salesnexus.com (Edit) Email Template

- 2) From the contact record, select “call” next to the number you wish to dial
- 3) Ring Central will dial you on your VOIP (computer) phone – answer and select 1 to complete the call
- 4) The activity box will open so you may note information regarding the call and SAVE this activity

Call Details:

Date: Time:

Regarding:

Details:

Result

Save with follow up Save