RingCentral Office®

Admin Guide

RingCentral®

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Getting Started

Introduction

RingCentral is an award-winning cloud communications system that delivers high-quality online meetings, unified voice, fax, text, and audio conferencing for businesses of all sizes.

This guide will help system administrators set up and access the following RingCentral features:

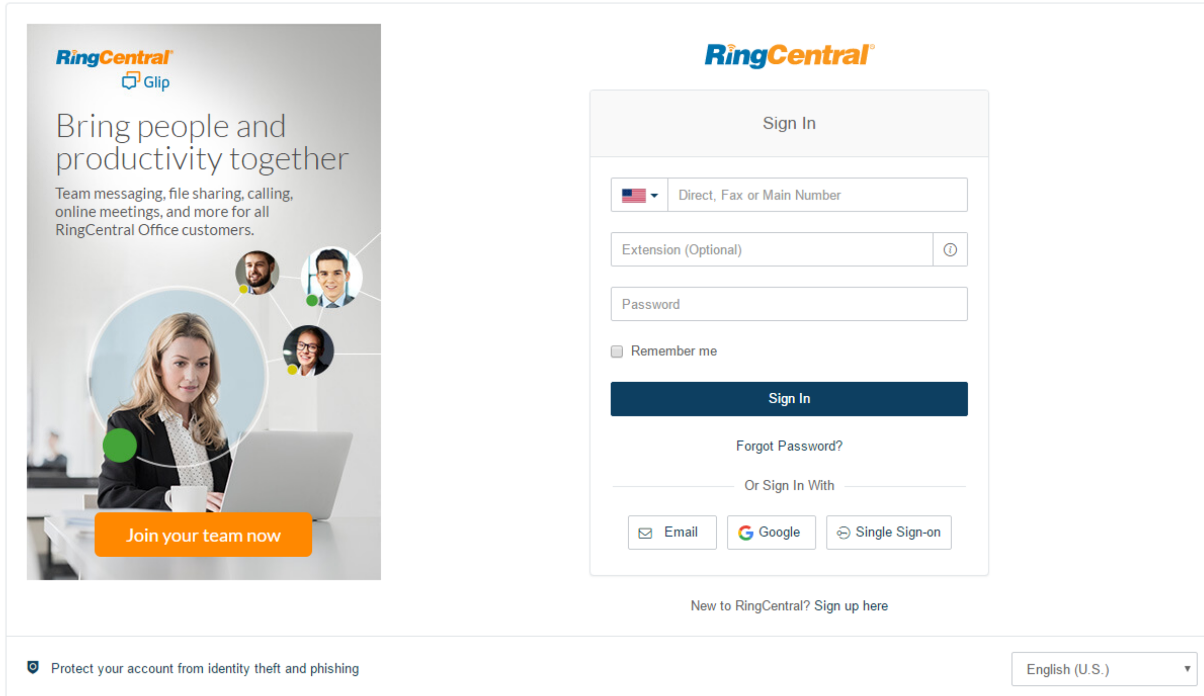
- Auto-Receptionist
- Multi-level IVR (Auto-Attendant)
- Visual IVR Editor
- Company directory
- Company numbers
- Call groups
- Presence
- Call queues
- Call monitoring
- Call handling and forwarding
- Call recording on-demand and automatic
- Audio conferencing
- Paging
- Hot desking
- Reports
- Roles and Permissions
- Templates
- RingCentral Rooms and Room Connector*
- Large Meetings*
- Webinars*
- Multiple Account Access
- Multi-site Support
- Corporate email as user ID
- Gmail (or G Suite) email as user ID
- Single sign-on

*An additional license fee is required.

How to Access Your Account

If you have created but not set up your administrator account, see "Appendix A: Express Setup for Admins" on page 259 to learn how to set up your account.

Log in to your online account by going to https://service.ringcentral.com/. The default method of account access is by RingCentral phone number. Select your country from the drop-down menu and enter your RingCentral phone number and password. Click **Log In**.



Unified Login

If you have both RingCentral and Glip credentials which use the same email address, you will use RingCentral credentials for logging in to all endpoints.

Email or Google as User ID

You may optionally configure users to log in with a unique corporate email address or Google (Gmail or G Suite) account. See Use a Corporate Email Address to Log In and Use a Google Account to Log In.

Single Sign-on

If Single Sign-on is set up for your account, click **Single Sign-on**. Enter your email address on the following screen, then log in with your corporate credentials. For more information see Single Sign-on*.

Account Validation

Account Validation is a security feature that helps protect against fraudulent activity on your account, by prompting for a security validation code when you log in from a new or unrecognized computer.

Use a Corporate Email Address to Log In

The Email as User ID feature allows users to log in using a unique email address. When users log in to an account, they receive a notification about the feature, and can enable the feature by specifying a unique email address.

This feature applies to accessing your RingCentral online account, RingCentral Meetings, endpoints such as RingCentral Phone, RingCentral Glip, integration applications, and the Multiple Account Access portal. This feature can also be configured during Express Setup of your RingCentral account.

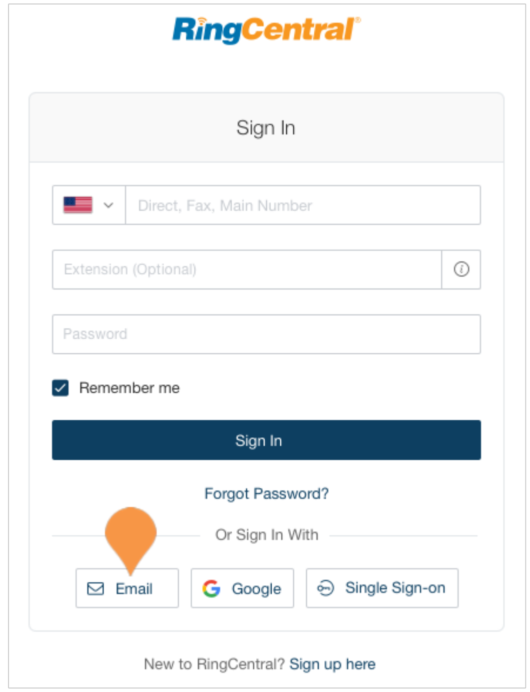
For information on automatically provisioning users from your corporate directory, see Directory Integration.

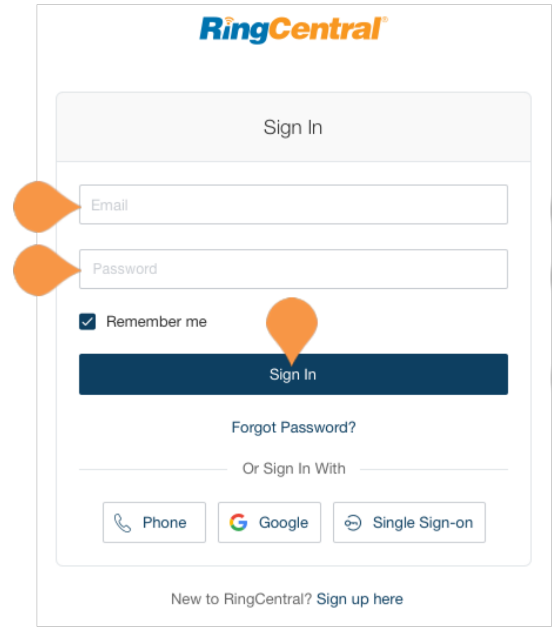
If not already configured, enable the feature:

1. Log into your account using RingCentral credentials.
2. Enable the feature as follows:
   a. In the email popup, select **Enable now**, and click **OK**.
   b. Or, in **User Settings**, select **Use email to log in**.
3. Verify the uniqueness of the email address.
4. Edit any duplicate email addresses.
5. Click **Save** and log out.

To Log In using Email as User ID:

1. In the login screen, click **Email**.
2. Enter the unique **Email** address and **Password** associated with your RingCentral account.
3. Click **Sign In**.





Use a Google Account to Log In

The Google login feature allows users native support for logging in using a Google email address and password. This feature requires a unique Google email address (Gmail or G Suite email). The admin configures a Google email address when assigning an extension, and verifies the uniqueness of the email address. By default, users can log in with their Google email address or other RingCentral credentials.

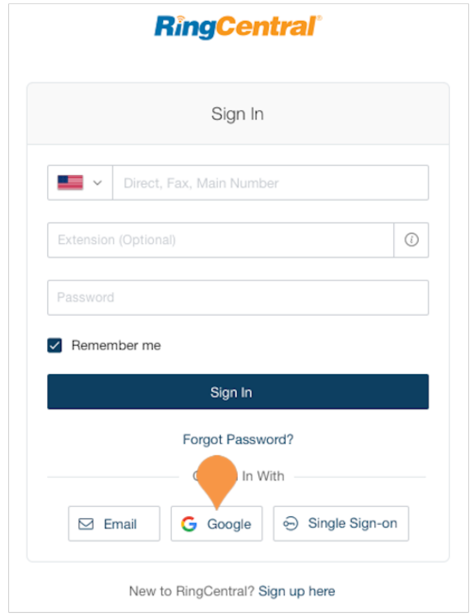
This feature applies to accessing your RingCentral online account, endpoint such as RingCentral Phone, RingCentral Meetings, RingCentral Glip, integration plug-ins for Chrome, and the Multiple Account Access portal. You can configure Google Email addresses during the Express Setup of your RingCentral account.

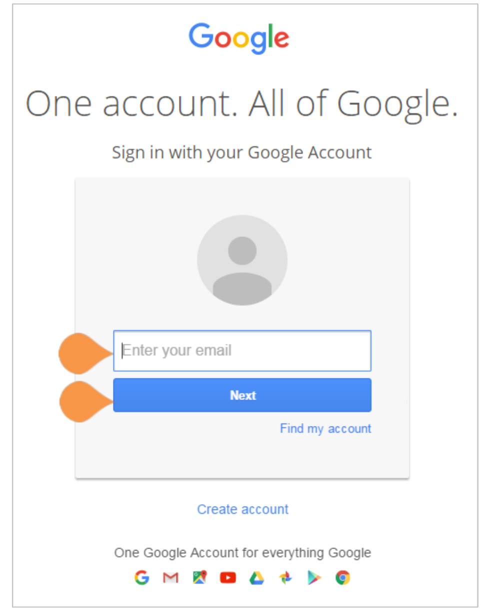
If not already configured, set a Google email address.

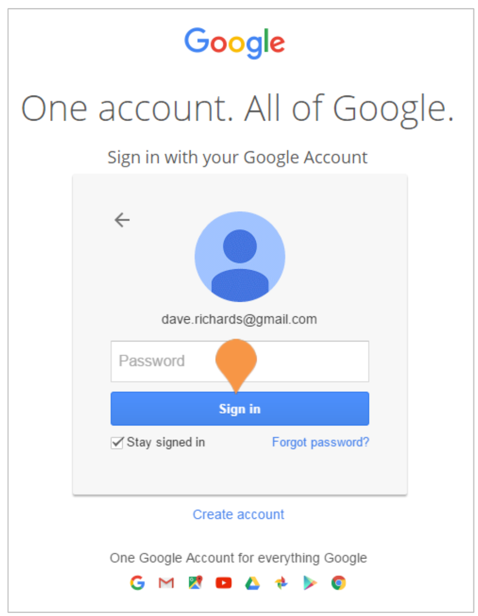
1. Log in using your RingCentral credentials.
2. Select **Users**.
3. Select a user. The user settings page is displayed.
4. In the **Email** field, specify a unique email address.
5. Click **Verify email uniqueness**; resolve duplicates.
6. Click **Save** and log out.

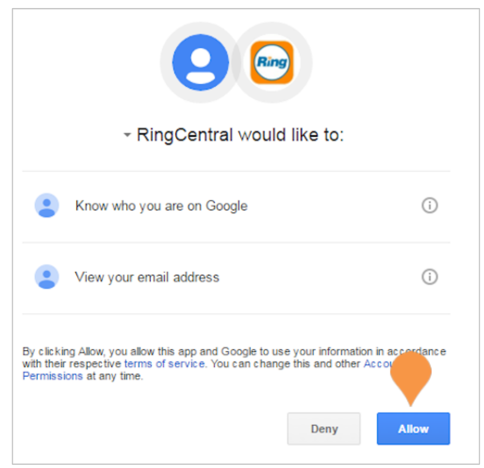
To Log In using Google:

1. In the login screen, click **Google**.
2. Enter your unique Gmail **Email** address and **Password**.
3. Edit any duplicate email addresses.
4. Click **Allow** to allow the application access.









Admin Homepage

When you log in as an administrator, you access the **Admin Portal** for admin-only tools and configuration of account-wide phone system settings. You can access your individual account overview and settings from the **My Extension** page. At the top of the screen, hover over **Admin Portal** and click **My Extension** to switch to your individual user homepage.

Main Functions

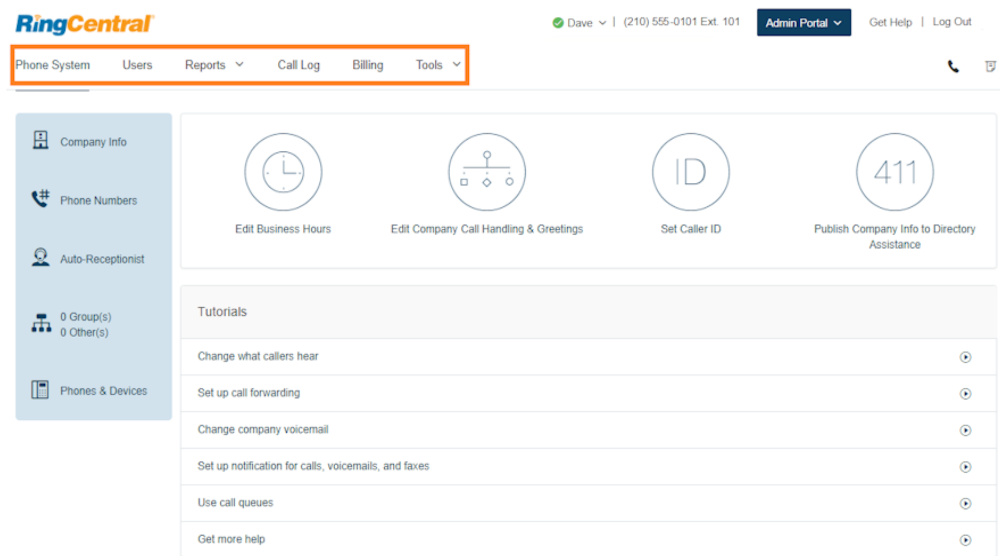
There are a few main functions that administrators can access from any online page. These functions are **Do Not Disturb**, **Conference**, **RingOut**, and **FaxOut**.

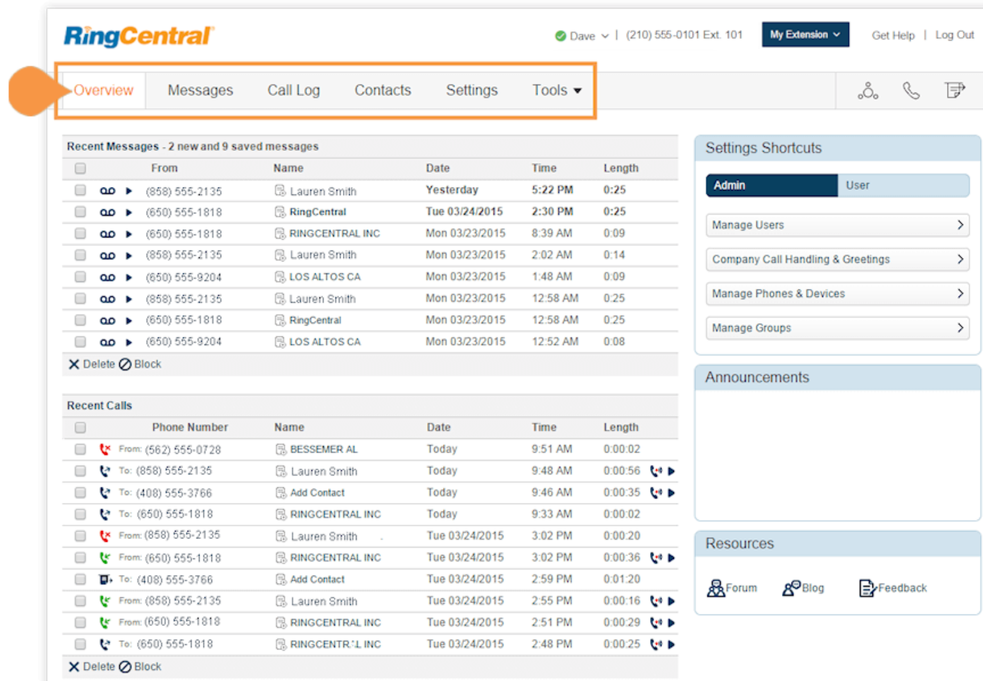
Admin Portal

From the **Admin Portal**, admins see admin-only tools. The **Phone System** tab houses all of the main settings for the entire phone system. Here, you have Company Info, Phone Number, Auto-Receptionist, Groups, and Phones and Devices. The **Users** tab allows you to view and manage users, and edit user permissions. The **Reports** tab presents usage analysis and trending metrics in an easy-to-read graphical format. The **Call Log**, and **Billing** tabs display information about your phone system. The **Tools** tab has more setup options such as Account Validation, and IVR.

My Extension

When you switch to the **My Extension** page, you see the standard user settings view of Overview, Messages, Call Log, Contacts, Settings, and Tools. Click on **Settings** to access your individual settings.The **My Extension** tab houses the same settings as a regular user has.

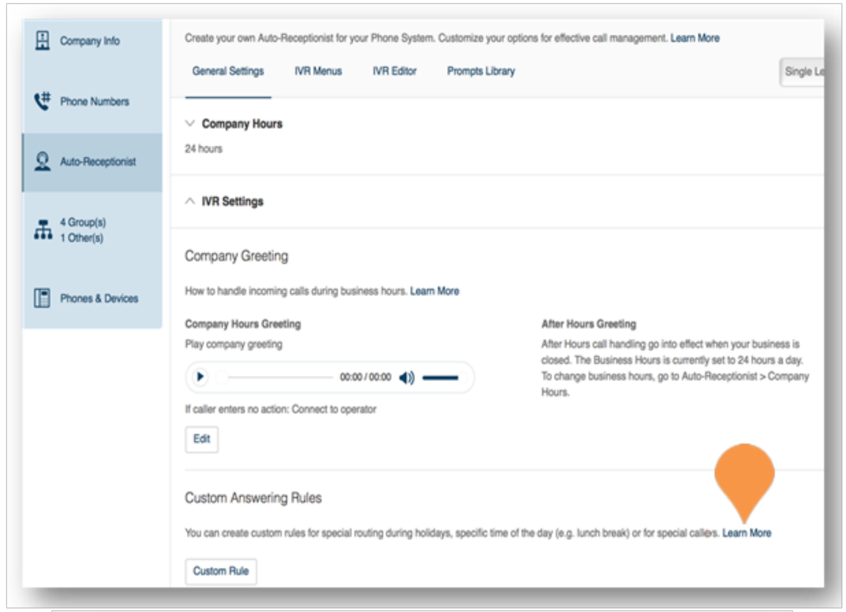


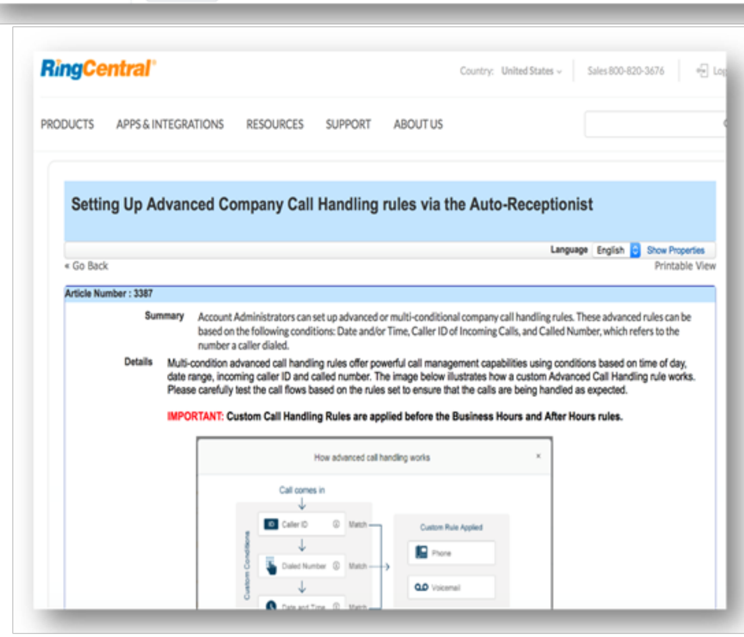


Product Help

The user interface provides in-product help about the most frequently used features to help you gain quick understanding of the features. Help includes:

- **Tooltip** icons that display in-product help text to help you successfully configure the feature.
- **Learn More** links that link you to relevant Knowledgebase articles on the RingCentral Customer Care portal for more detailed feature information.

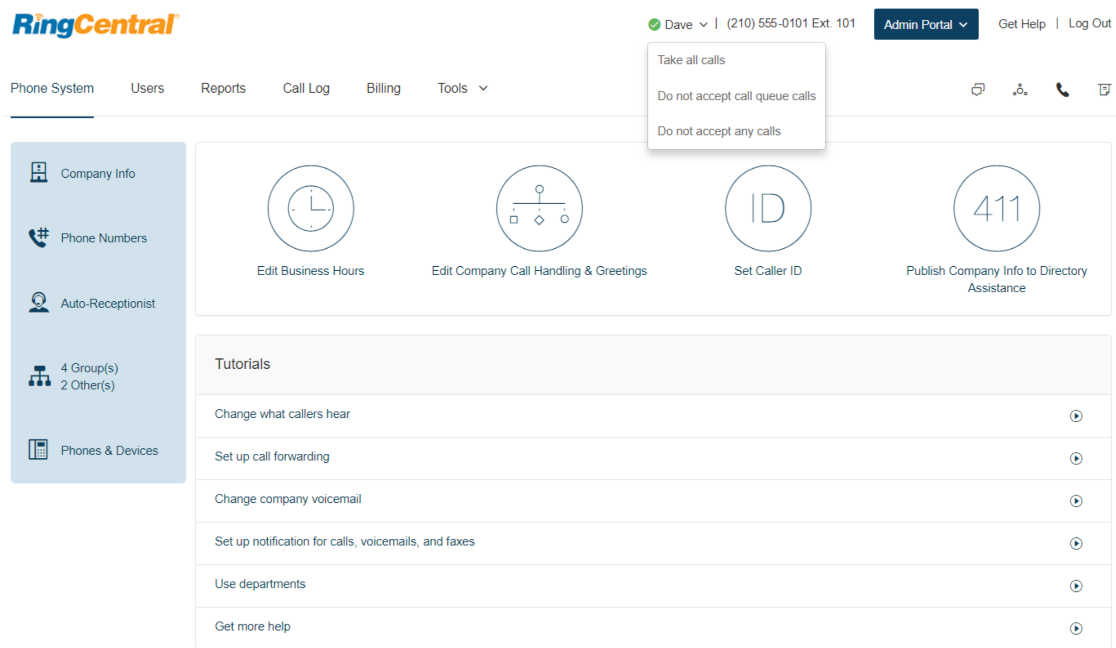




Do Not Disturb

In the upper right of every page of your online account is a small colored icon next to your name. This icon displays your **Do Not Disturb** status. Click the icon to toggle between statuses:

- **Take all calls -** you are available to take all incoming calls.
- **Do not accept call queue calls -** you do not accept from a call queue; those calls are sent to your voicemail.
- **Do not accept any calls -** you do not accept any calls. All callers are sent to voicemail.



Audio Conference

RingCentral customers can set up, host, and join conference calls anytime, anywhere. Click the Conference icon in the upper-right corner of your online account to get started.

Each customer receives a unique conference bridge number, and each user on the phone system gets his or her own host and participant access code so that you and your team can hold independent conferences at any time.

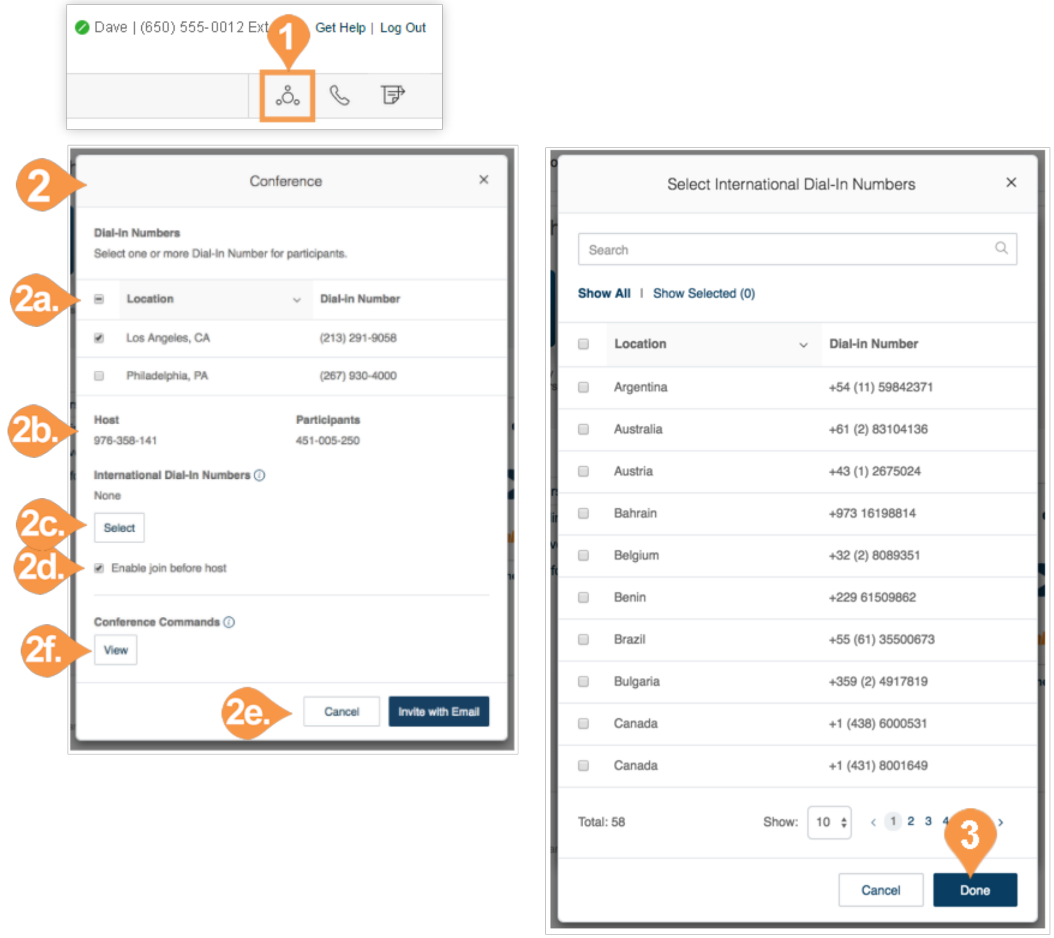
You can also add an international dial-in number in the invitation. Check the "I have international participants" option, then select the countries to be included from the list.

Each conference call can include up to 1000 attendees, enabling you to hold large meetings and broadcasts.

*See Conference Commands on the following pages.

Launch the Conferencing Application

1. Click the Conference icon. A pop-up appears with conference numbers and settings.
2. View and set the following:
   a. View Dial-in numbers.
   b. View Host and Participant codes.
   c. If you have international participants, check the box next to **International Dial-in Numbers**. Select international dial-in numbers at the bottom of the pop-up.
   d. Check the box next to **Enable join before host** to allow participants to start a conference call without a host.
   e. Click **Invite with Email** to open an email with pre-populated conference details. Then enter participant details and send.
   f. Click **Conference Commands** to view and set additional features.
3. Click **Done**.



Conference Commands

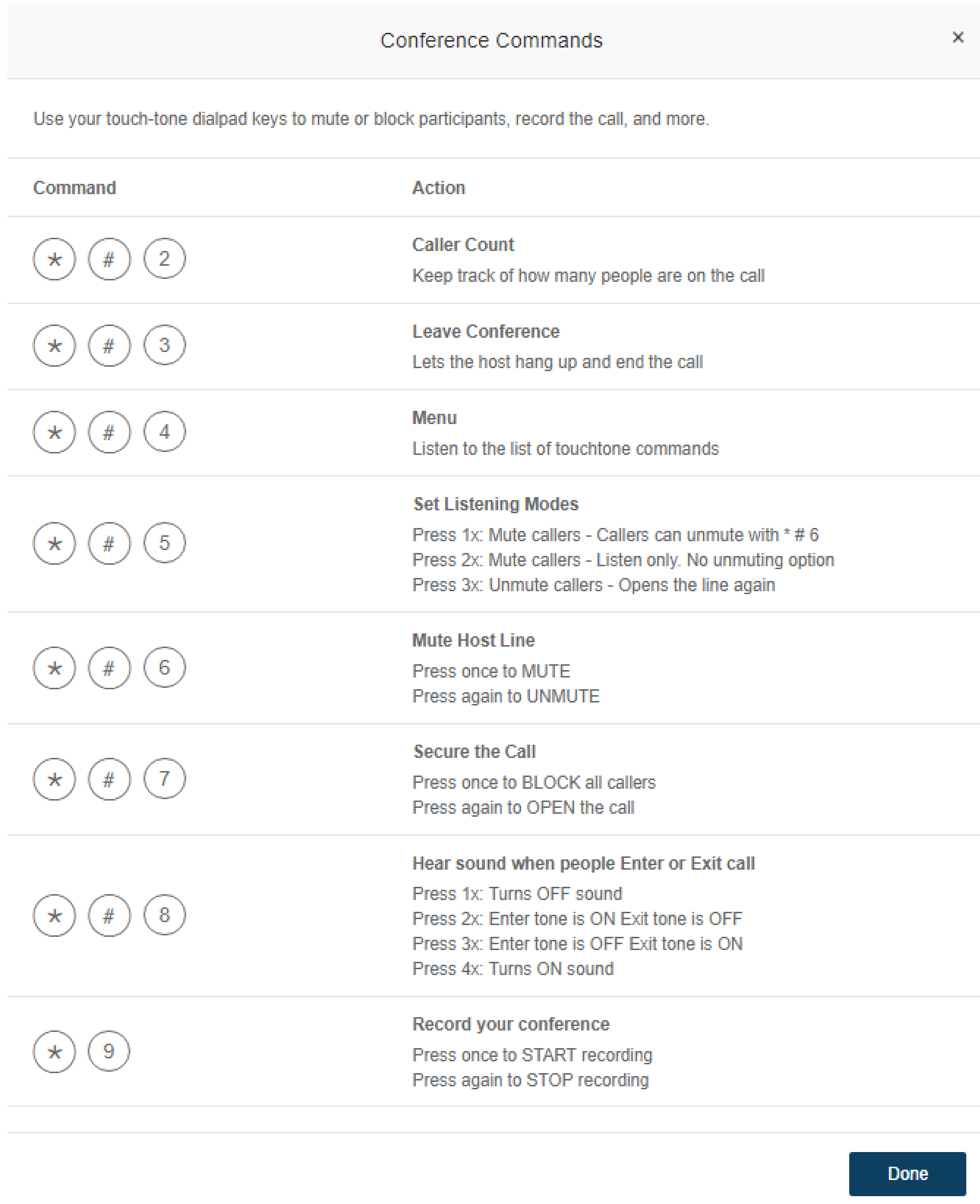
For the Conferencing feature, the host and participants have the same conference bridge number to dial in to, but their call control depends on the access codes that they will use.

- The Host has the full call control and can access the conference commands in the table to the right.
- Participants have limited control of the conference commands.

The commands are displayed with the conferencing dial-in information.

Preventing Music-On-Hold

An on-demand parameter can be configured to prevent users from playing music-on-hold. When you request support to enable this parameter for your account, and a user with music on hold enabled joins a conference bridge, the client is prevented from playing music-on-hold during an explicit or implicit hold (such as answering an incoming call). This feature allows other participants on the bridge to continue without disruption.


Conference Commands ×

Use your touch-tone dialpad keys to mute or block participants, record the call, and more.

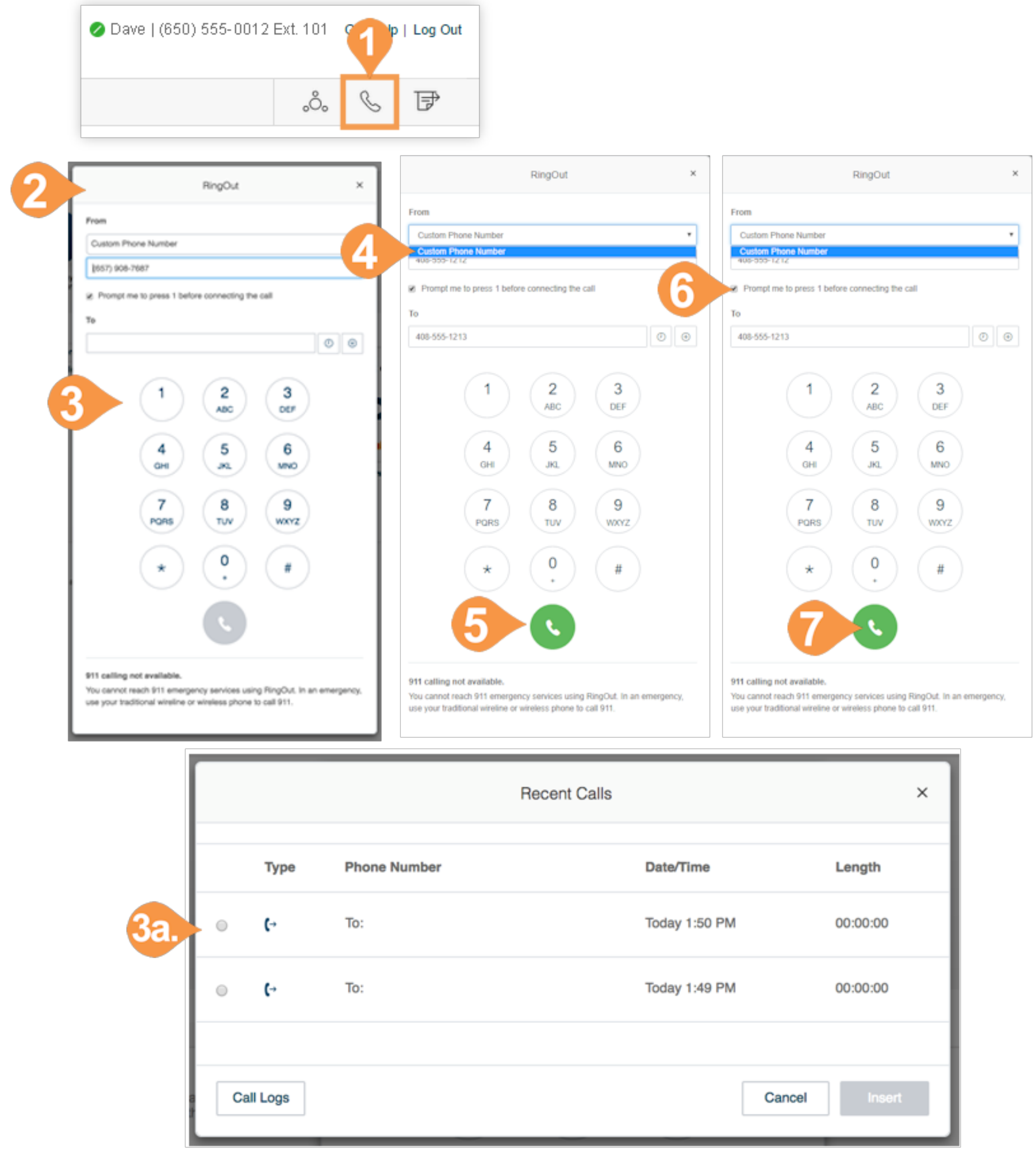
Command	Action
* # 2	**Caller Count** Keep track of how many people are on the call
* # 3	**Leave Conference** Lets the host hang up and end the call
* # 4	**Menu** Listen to the list of touchtone commands
* # 5	**Set Listening Modes** Press 1x: Mute callers - Callers can unmute with * # 6 Press 2x: Mute callers - Listen only. No unmuting option Press 3x: Unmute callers - Opens the line again
* # 6	**Mute Host Line** Press once to MUTE Press again to UNMUTE
* # 7	**Secure the Call** Press once to BLOCK all callers Press again to OPEN the call
* # 8	**Hear sound when people Enter or Exit call** Press 1x: Turns OFF sound Press 2x: Enter tone is ON Exit tone is OFF Press 3x: Enter tone is OFF Exit tone is ON Press 4x: Turns ON sound
* 9	**Record your conference** Press once to START recording Press again to STOP recording

Done

RingOut

RingOut enables one-touch calling from any phone or internet-enabled computer, allowing you to make calls using your business caller ID from any location, such as a hotel room. The RingOut icon is located in the upper right of every online account page.

1. Click the **RingOut** icon in the upper right corner.
2. A pop-up dialer will appear.
3. Dial a number or use your keyboard to type a number into the text field.
   a. You can also choose from among recent calls, or from your contact list.
4. Select the **From** number you'd like to show as your caller ID. You also have the option to choose Custom phone number from the drop-down menu and enter the desired number in the text field below the drop-down menu.
5. Once you have entered From and To numbers, the **Call button** will turn green.
6. Check the box next to **Prompt me to press 1 before connecting the call** if you'd like the system to confirm that you would like to make the call before you are connected. When the system calls you, you will hear "*Please press 1 to connect.*" This message protects you in case you mistyped your own number, or if your voicemail picks up too quickly.
7. Click the **Call** icon. The system first calls you. When you answer (and press 1 as instructed if you've selected this option), it then calls the other number and connects you.



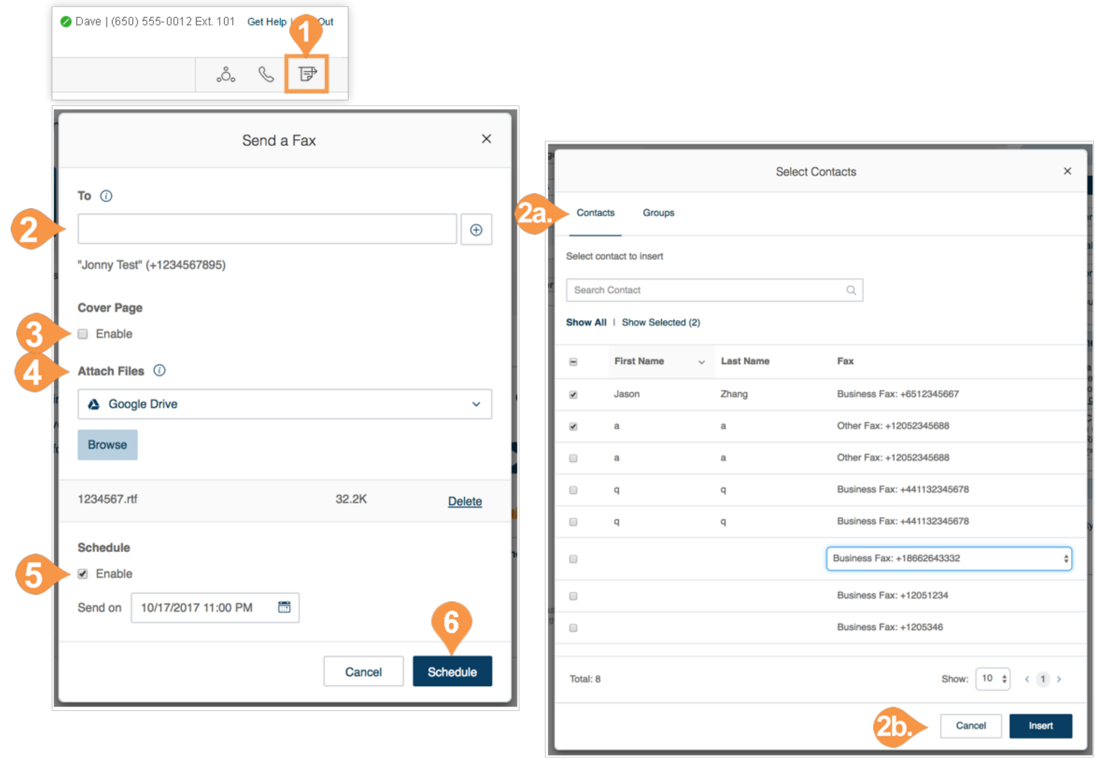
FaxOut

To quickly send a fax from your online account, click the FaxOut icon located in the upper right corner. Fill in the form with recipient's fax number and cover page information, and attach or scan a document, which will automatically be converted into a fax.

FaxOut recognizes a wide variety of standard document types, including word processing and spreadsheet and PDF documents.

Send files from Dropbox, Box, or Google Drive with just a few clicks.

1. Click the **FaxOut** icon in the upper-right corner.
2. Enter up to 50 recipients.
   a. Search and choose Contacts or Groups.
   a. Click **Insert**.
3. Select your cover page and add a message.
4. Attach files from Dropbox, Box, Google Drive, or your computer and authorize RingCentral to access your files (you have to do this only once).
5. To enable scheduling, select **Enable** and select a time for **Send on**.
6. Click **Schedule**.



Phone System

Phone System

The **Phone System** tab houses all of the main settings for your entire phone system. Here you will find settings for:

- Company Info
- Phone Numbers
- Auto-Receptionist Settings
- Multi-Level Auto-Receptionist
- Groups
- Phones & Devices

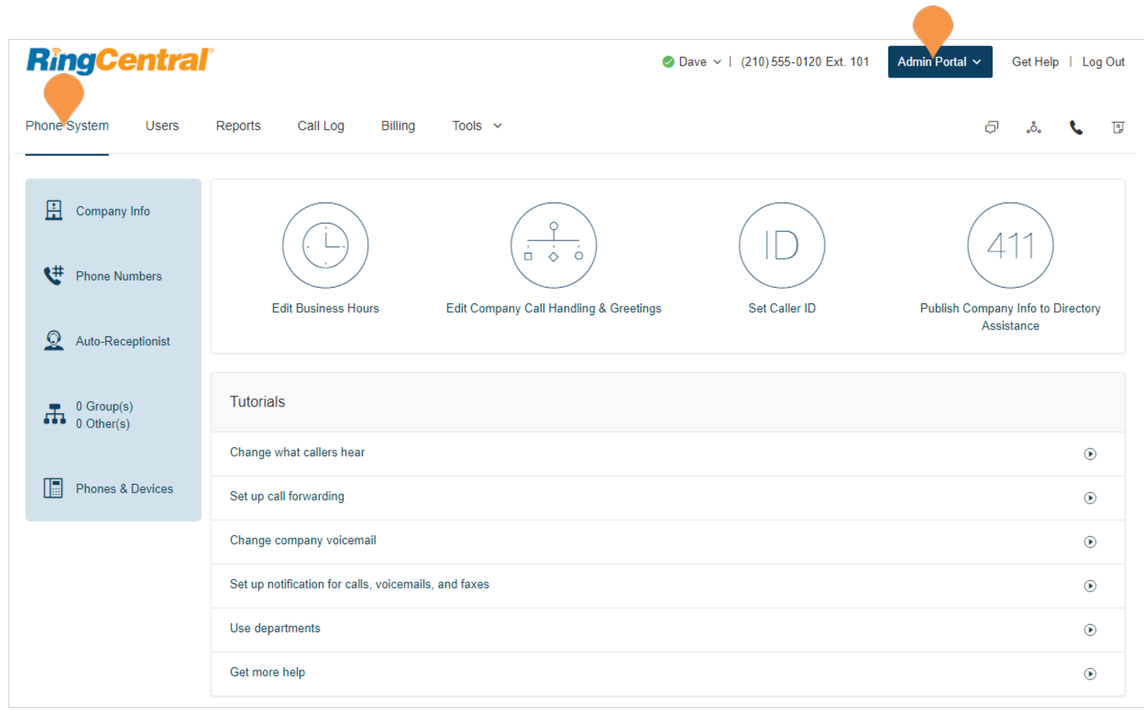
On your **Phone System** page, you have Shortcuts for quick access to commonly used functions, such as:

- Edit Company Business Hours
- Change Company Greeting
- Set Company Caller ID
- Publish Company Info to Directory Assistance

Click "Get Help" in the upper right corner for access to the RingCentral Help Center.

How do I…

If you need help setting up your phone system, see the How do I… section to watch short, helpful videos.



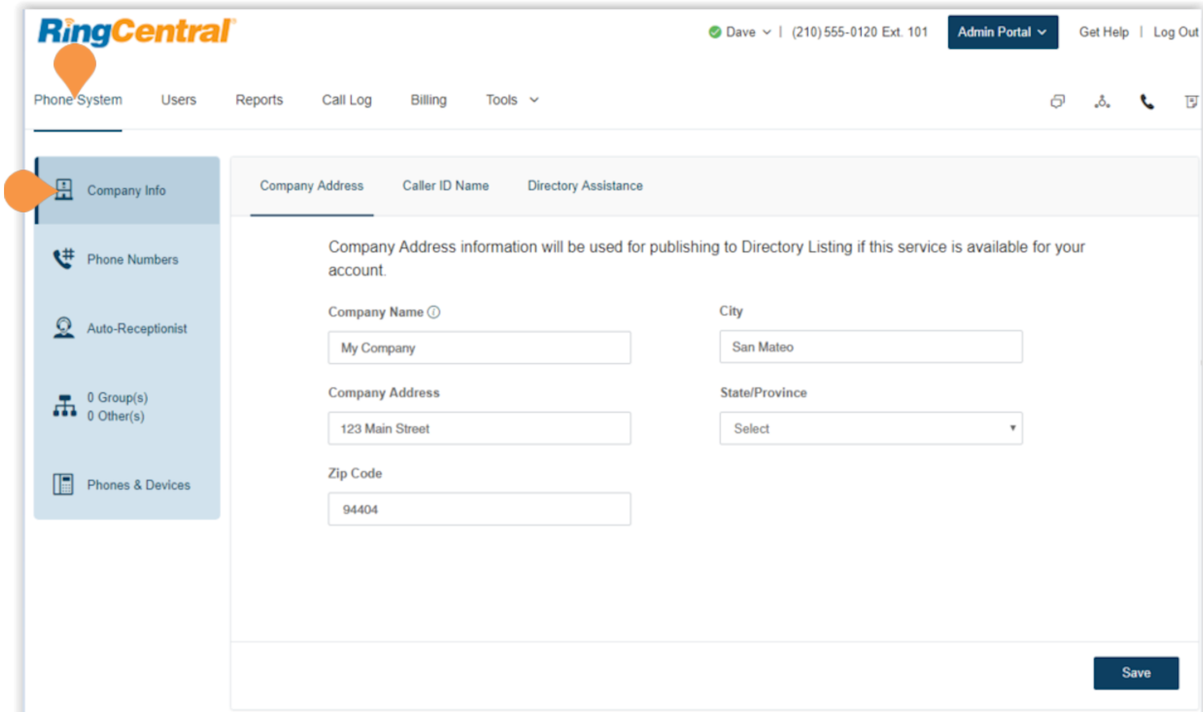
Company Info

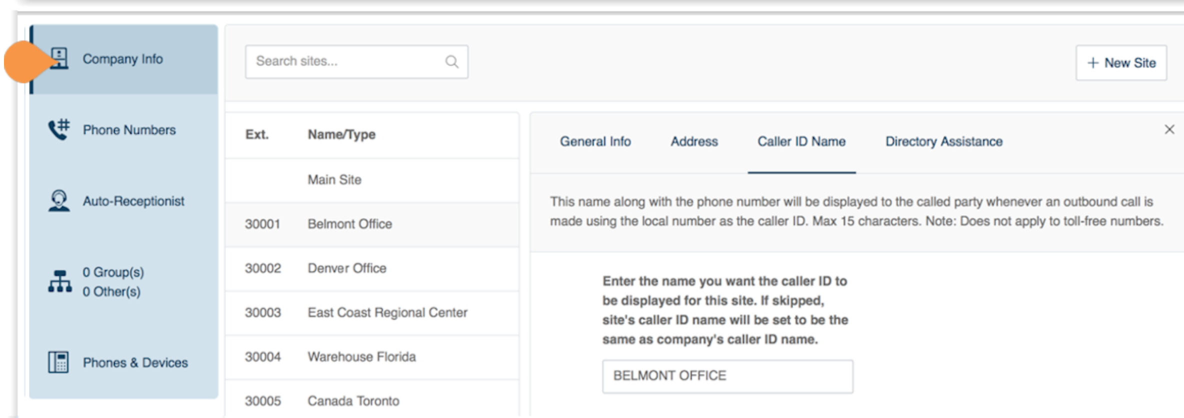
Your account may be a single-site account, or may contain multiple sites when you have enabled RingCentral Multi-Site Support. With a single-site account, the Company Info page displays the settings for your account, including Company Address, Caller ID Name, and Directory Assistance. Select the appropriate tab to access each section.

Manage Sites with Multi-Site Support

When you have enabled RingCentral Multi-Site Support, the user interface displays each of the configured sites in your account, and allows you to create a new site (by selecting **New Site**) or edit the information for any of your existing sites (by selecting the site from the list). Site filter controls are also available from pages which contain site assets.

For more information on RingCentral Multi-Site Support, see Multi-Site Settings. To create a new site, see Create a New Site.

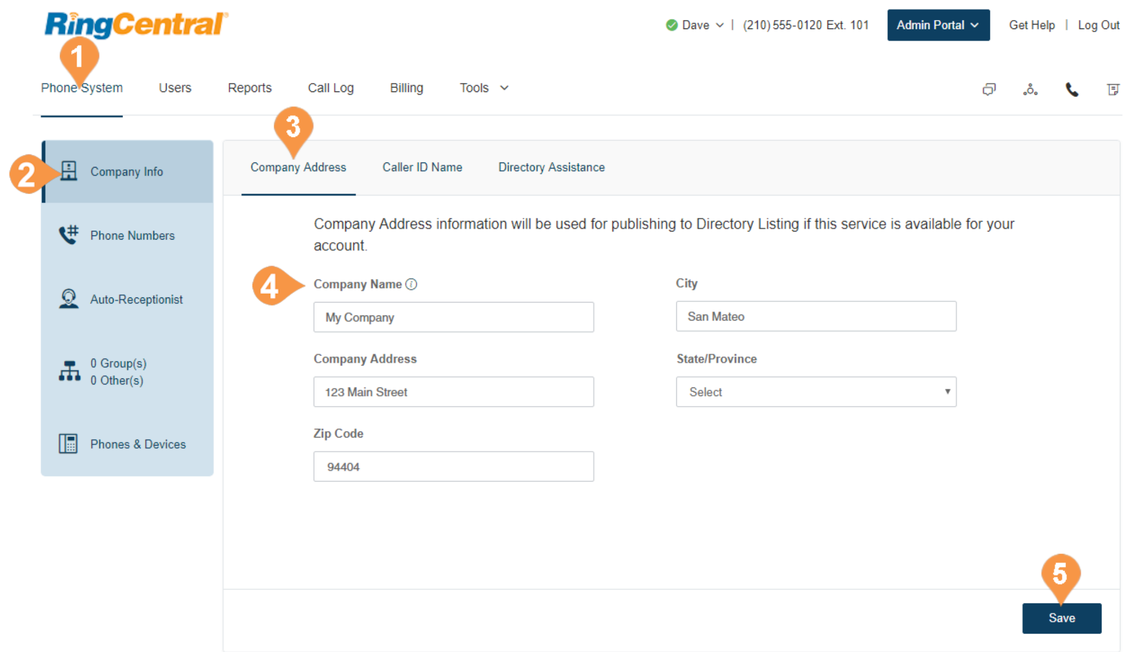




Company Address

Set your Company Address information for the default Company Greeting and your company address for a Directory Listing (if available for your account).

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Info**.
3. Click **Company Address**.
4. Enter your **Company Name**, **Company Address** with **City**, **State**, **Zip Code**, and **Email Address**.
5. Click **Save**.



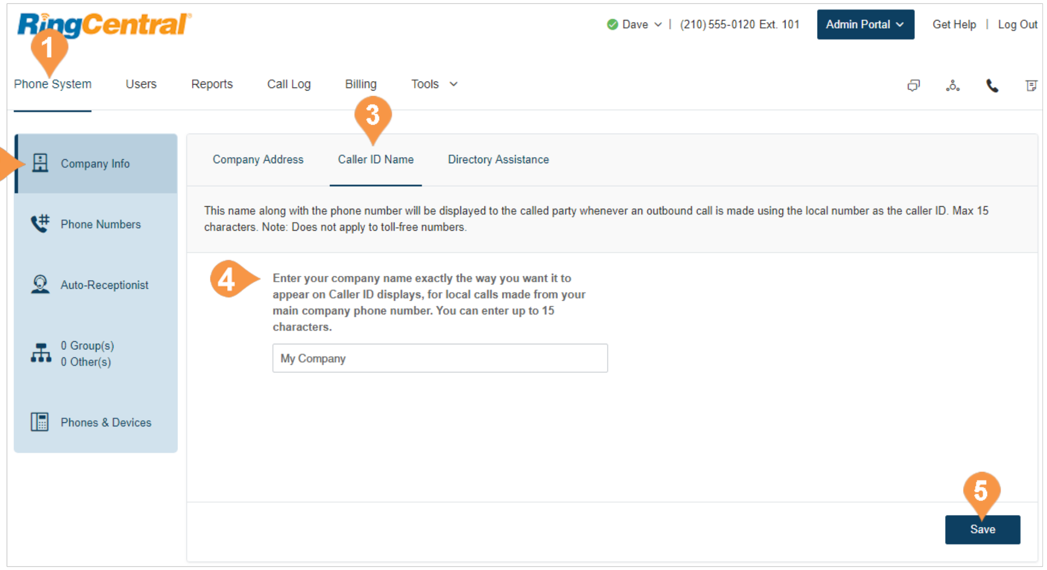
Caller ID Name

Set your Company Caller ID to your company's name so that your customers will know who is calling them.

This name along with the phone number is displayed to the called party whenever an outbound call is made using the local number as the caller ID.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Info**.
3. Click **Caller ID Name**.
4. Enter your company name exactly the way you want it to appear on Caller ID displays, for local calls made from your main company phone number. You can enter up to 15 characters.
5. Click **Save**.

Outbound Caller ID cannot be set for an individual number or digital line. It is only available for local numbers and not toll-free numbers.



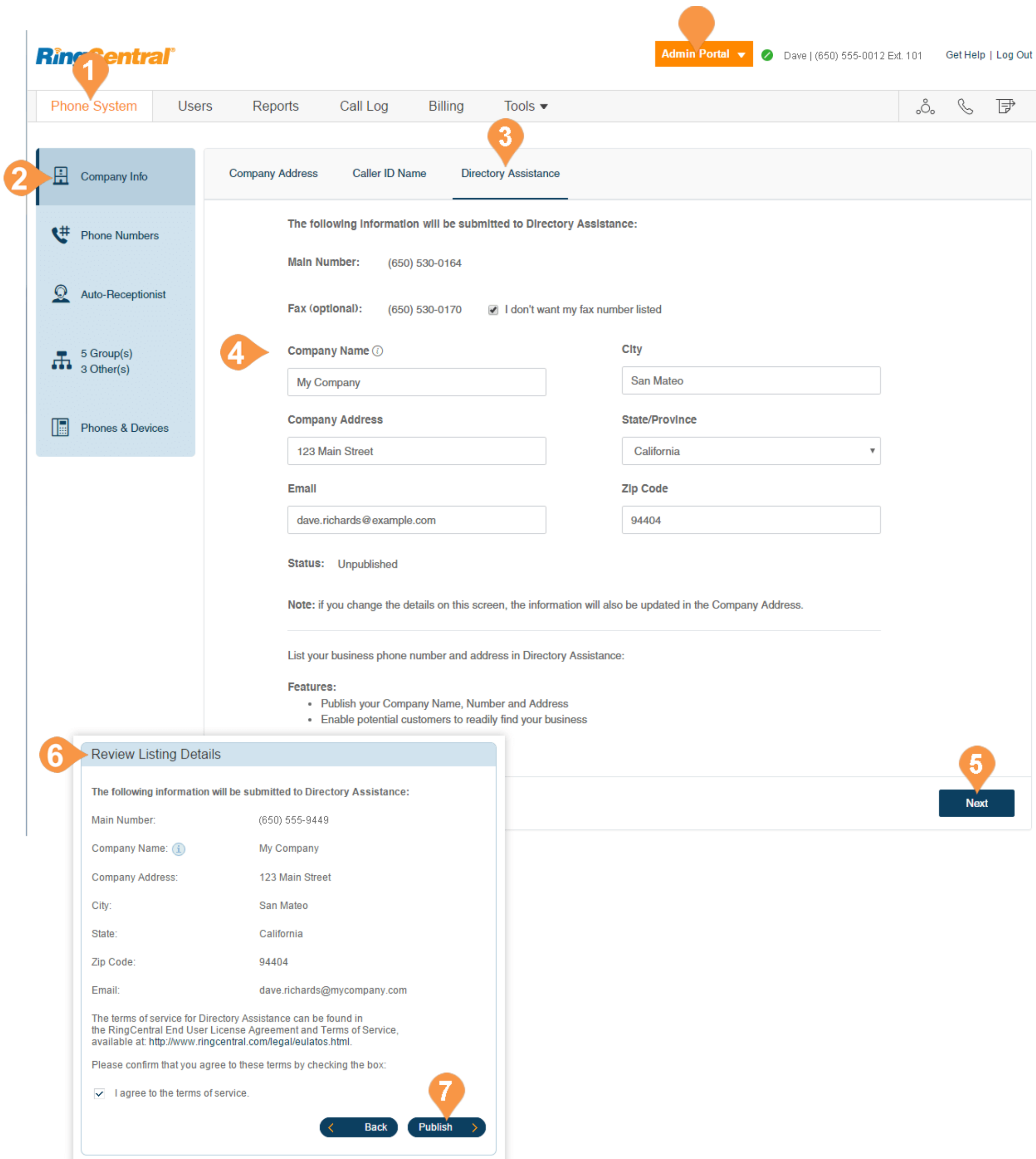
Directory Assistance

Directory Assistance is a free and convenient way to publish your business name, address, main number, and main fax number to increase your company's visibility in local directory assistance listings. For more information about Directory Listing, see Directory Listing Frequently Asked Questions.

To publish your information:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Company Info**.
3. Click **Directory Assistance**.
4. Enter your listing information.
5. Click **Next**.
6. Check the box next to "**I agree to the terms of service**."
7. Click **Publish**.

Allow five business days for your listing to appear. Edit or delete your listing any time by following these same steps.

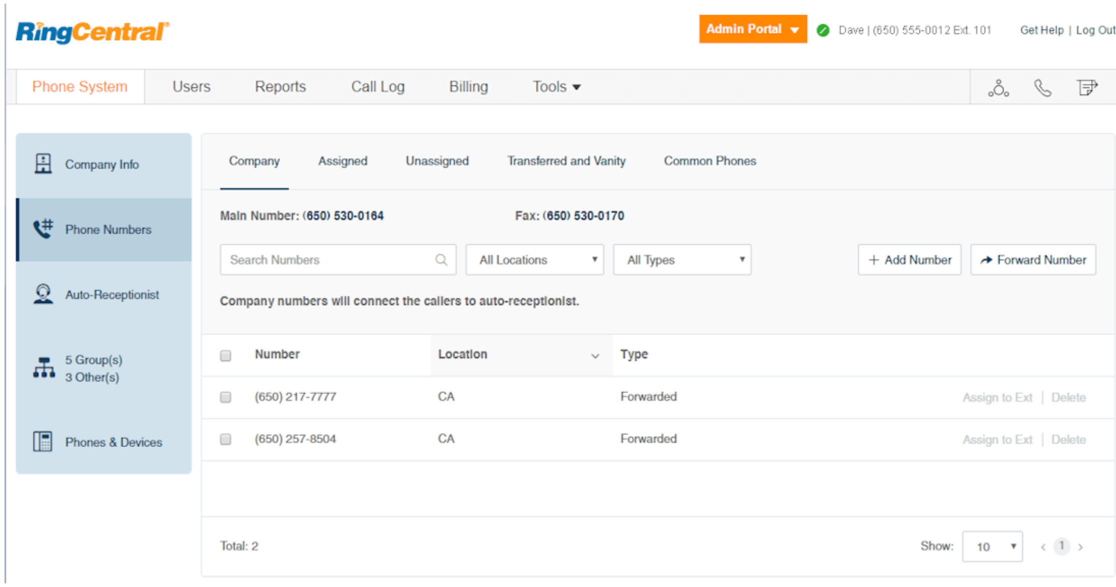


Phone Numbers

The Phone Numbers tab allows you to view your numbers by category of number, and add additional numbers to your account.

The tabs contain these types of numbers:

- **Company**: numbers that will connect the caller to the Auto-Receptionist.
- **Assigned**: numbers in your account assigned specifically to an extension.
- **Unassigned**: numbers in your account not assigned to any user.
- **Transferred and Vanity**: existing numbers that have been transferred, and vanity numbers to help customers remember your business phone number.
- **Common Phones**: numbers that are dedicated for use as phones for Hot Desking. For more information, see Managing Hot Desking.

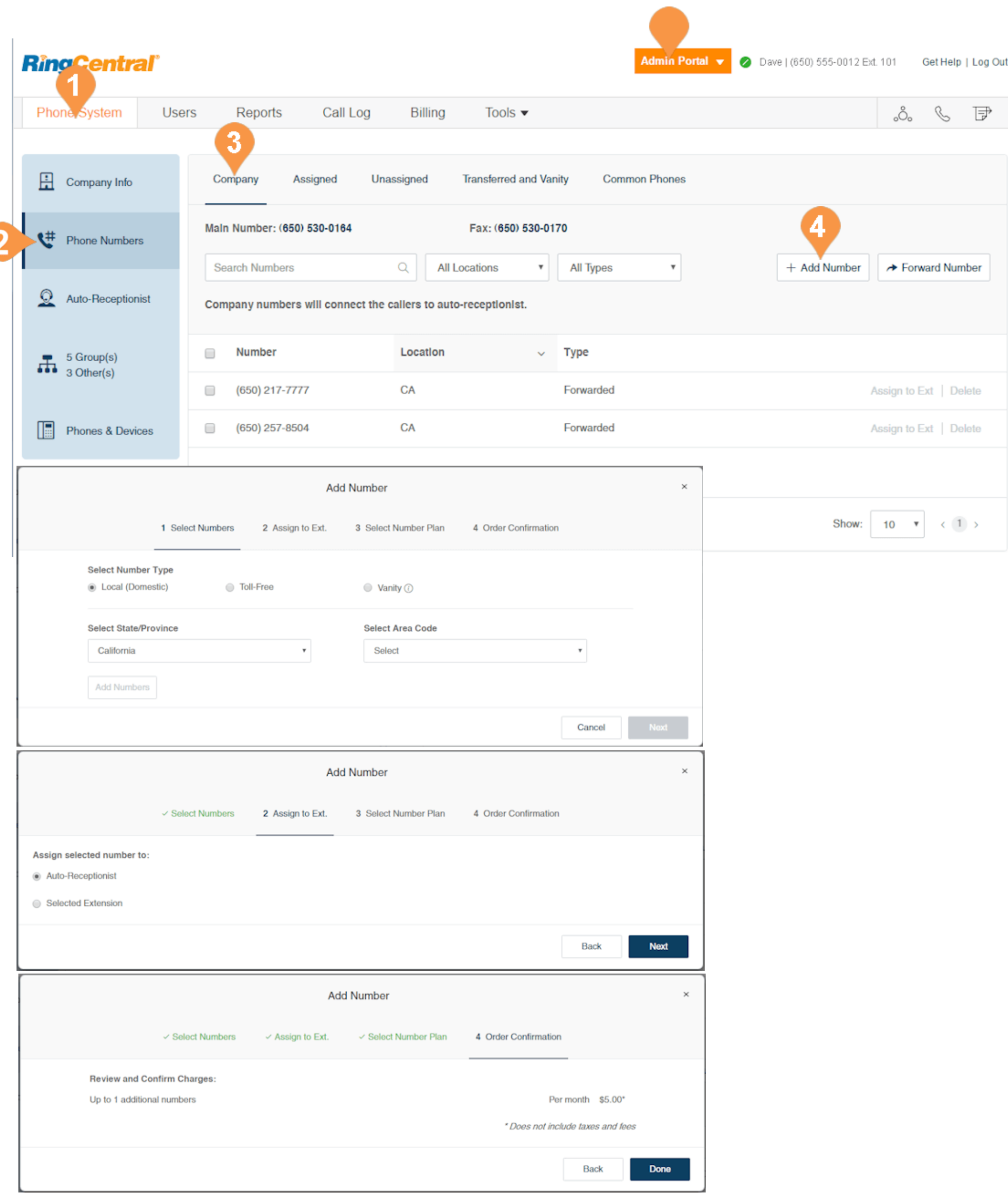


Add Company Numbers

Adding company numbers to your RingCentral account is simple. Select from a list of local numbers by city and area code, choose an available toll-free number, create your own vanity (personalized) number, or use an existing number.

Each RingCentral number can function as a voice and fax line for incoming calls. This means that one number can be used for both calls and faxing to maximize the use of your service.

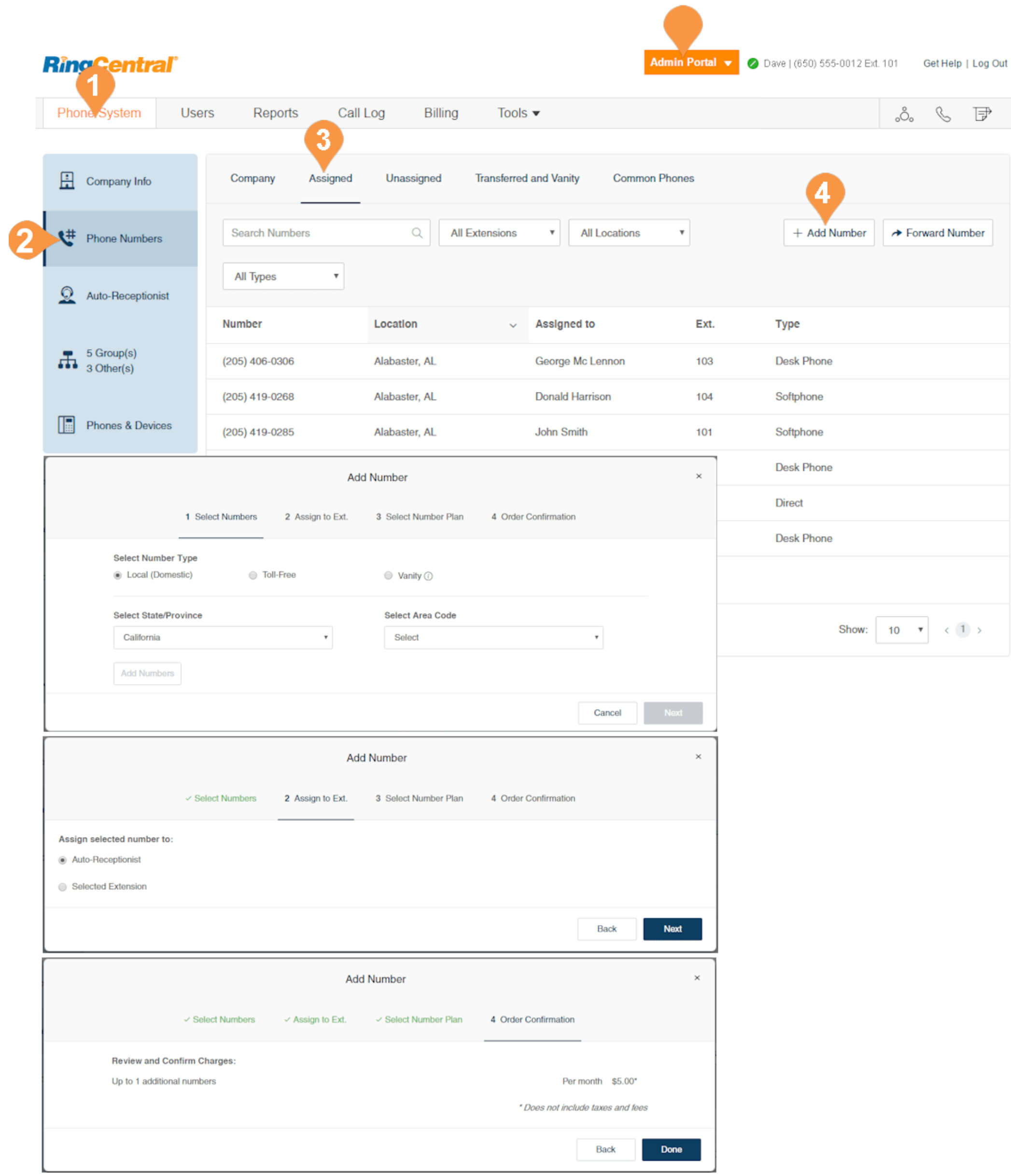
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click **Company**.
4. Click **Add Number**, then follow these instructions:
   a. **Local (Domestic):** Provide the State/Province and Area Code and Select Number. Select one or more numbers and click **Add Numbers**.
   b. **Toll-Free Number**: Select the button for **Toll-Free Number**. and select a Toll-Free prefix. Select one or more numbers and click **Add Numbers**.
   c. **Vanity**: Select the tab for **Vanity Number**. Enter a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to check availability. Select a number and click **Add Numbers**.
   d. **International**: Select the button next to **Geographic Number** or **Toll-Free Number**. Select one or more numbers and click **Add Numbers**.
5. Click **Next**.
6. Assign the number as Auto-Receptionist or Select Extension.
7. Review any changes to your number plan.
8. Click **Done**.



Add Assigned Numbers

Under Assigned, you will see all of the numbers assigned to a user that have been set for your phone system. From here, you can add a number.

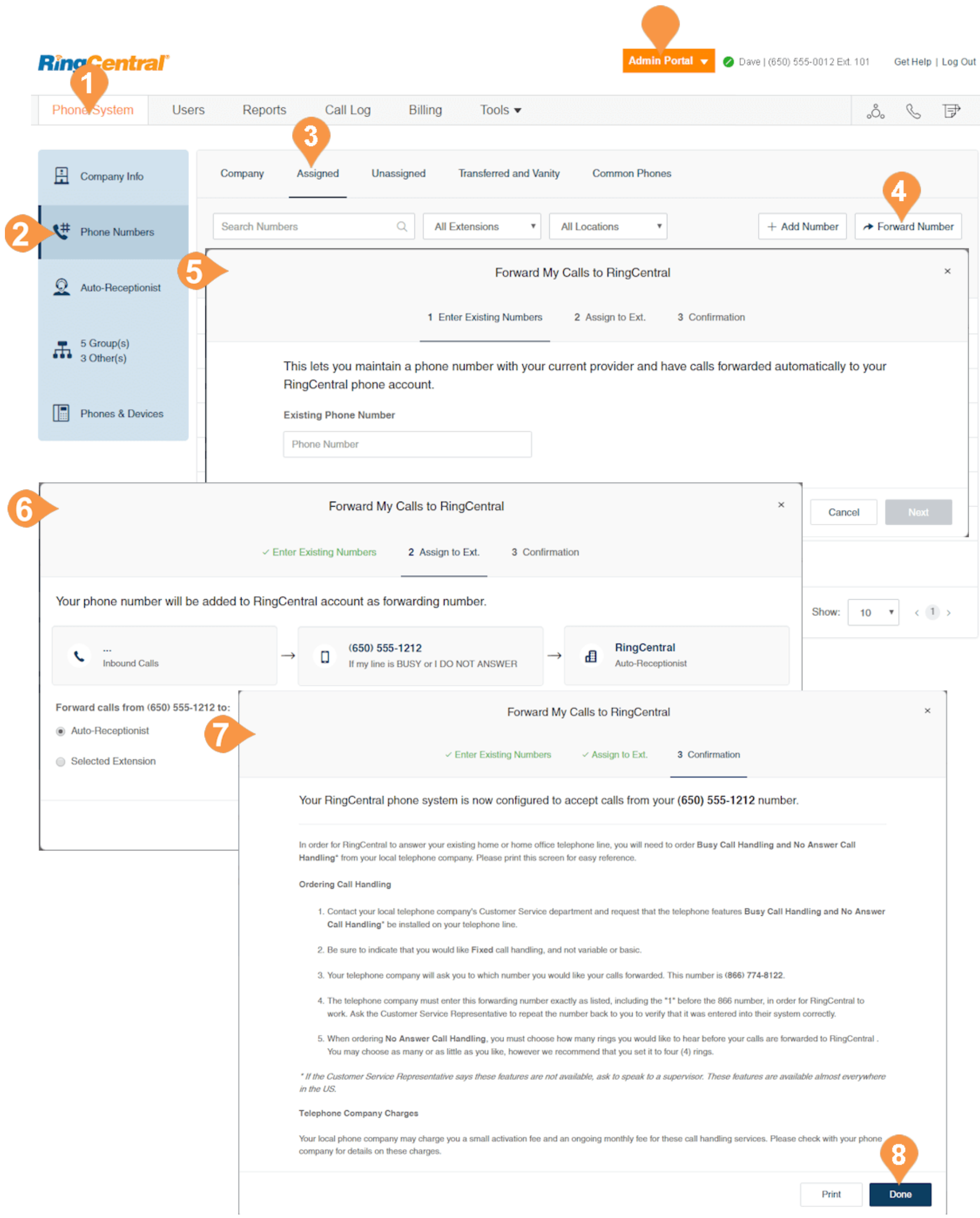
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click **Assigned**.
4. Click **Add Number**. Follow the following instructions for the type of number you choose:
   a. **Local (Domestic):** Provide the State/Province and Area Code and Select Number. Select one or more numbers and click **Add Numbers**.
   b. **Toll-Free Number**: Select the button for **Toll-Free Number**. and select a Toll-Free prefix. Select one or more numbers and click **Add Numbers.**
   c. **Vanity**: Select the tab for **Vanity Number**. Enter a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available. Select a number and click **Add Numbers**.
   d. **International**: Select the button next to **Geographic Number** or **Toll-Free Number**. Select one or more numbers and click **Add Numbers.**
5. Click **Next**.
6. Assign the number as Auto-Receptionist or Select Extension.
7. Review any changes to your number plan.
8. Click Done.



Forward a Number

To maintain your phone number with your current provider, and forward calls automatically to your RingCentral account.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click the **Assigned** tab.
4. Click **Forward Number**.
5. Enter an existing phone number and click **Next**.
6. Select **Auto-Receptionist**, or **Select Extension**. Click **Next**.
7. Review the information about ordering Busy Call Handling and No Answer Call Handling from your local telephone company, and local telephone company changes.
8. Click **Done**.

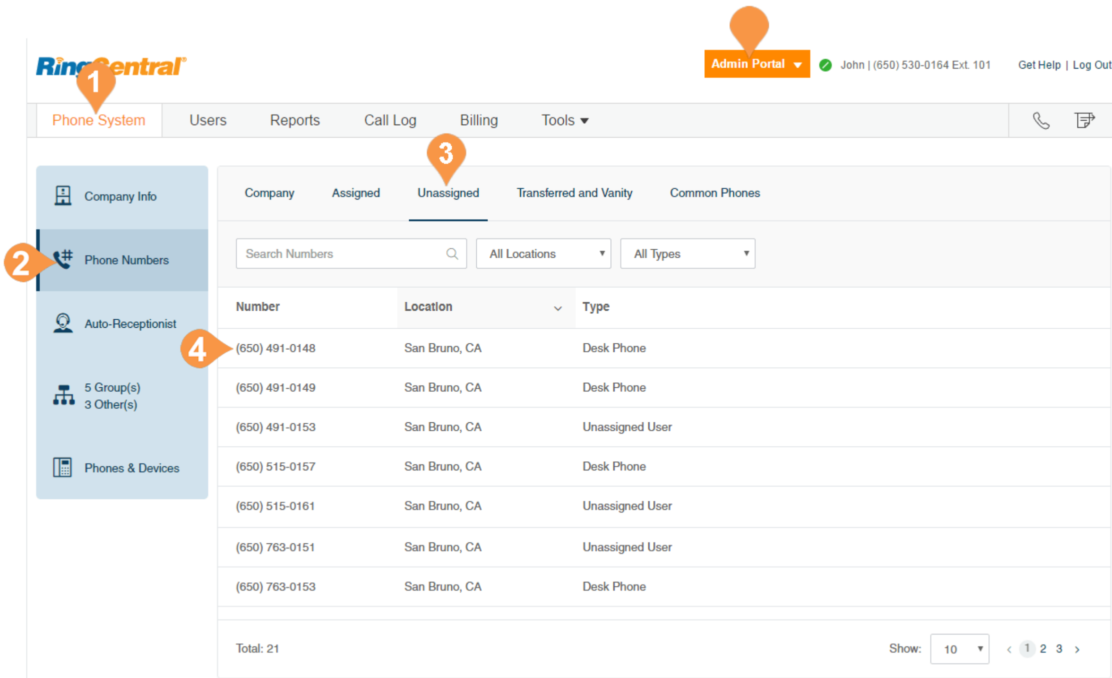


View Unassigned Numbers

Under Unassigned, you will see all of the numbers that have not yet been assigned to a user. From here, you can unassign a number.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click **Unassigned**.
4. Click a number to see more details. You can filter results by **Location** and **Type**.

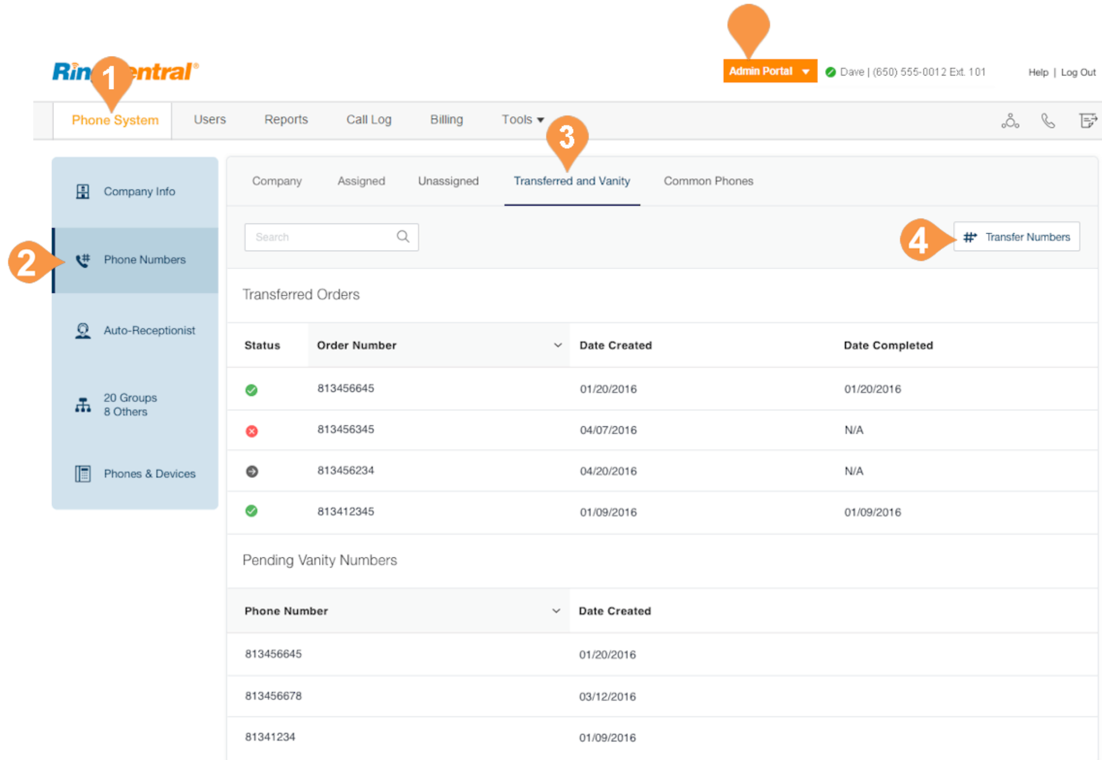
You can view phone properties in the Phones & Devices section.



View Transferred and Vanity Numbers

Under Transferred and Vanity Numbers, you will see the numbers that you have transferred, and vanity numbers.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click **Transferred and Vanity**. You can filter results by **Location** and **Type**. Click a number to see more details.
4. **To transfer a number to RingCentral,** select **Transfer Number.** Select a Local or Toll Free Number, and complete the process.
5. To forward calls from your number to Office@Hand, select **Forward my calls to AT&T Office@Hand.** Enter your existing phone number. Select whether to forward the calls to the company auto-receptionist or an extension.



View Common Phones

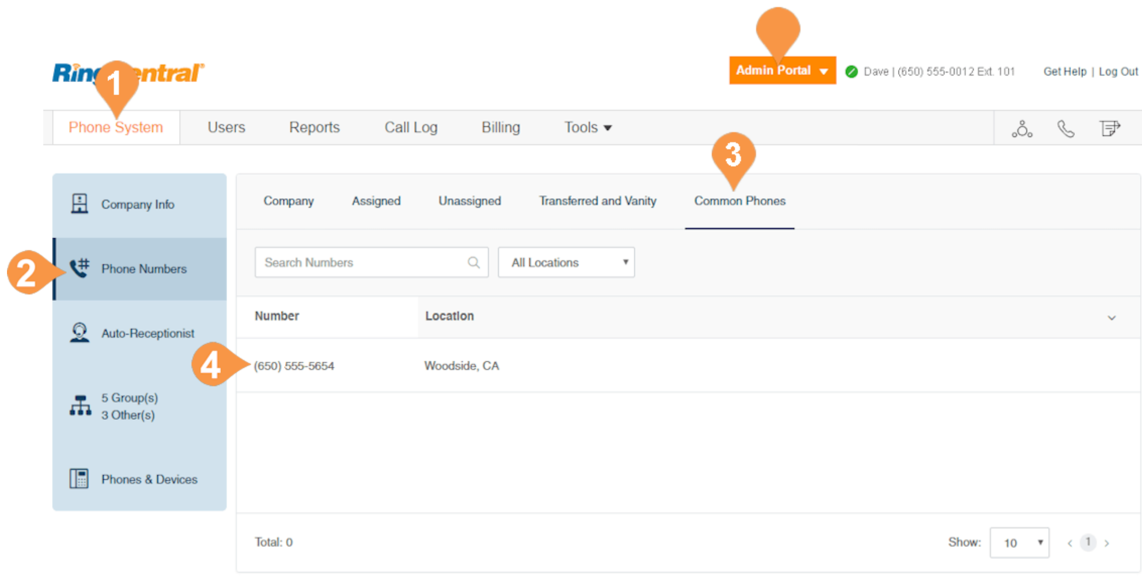
A telephone shared between users is called a common phone. **Hot Desking** allows users to share a common phone. With **Hot Desking** you can log in to a shared RingCentral desk phone remotely—and use it like your own—with access to your personal extension, saved settings, voicemail, and more.

Under Common Phones, you will see all of the numbers that have been assigned for hot desking.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click **Common Phones**. Click a number to see more details. You can filter results by **Location** and **Type**.

You can view phone properties in the Phones & Devices section.

To learn more about Hot Desking, see page 143.



Auto-Receptionist

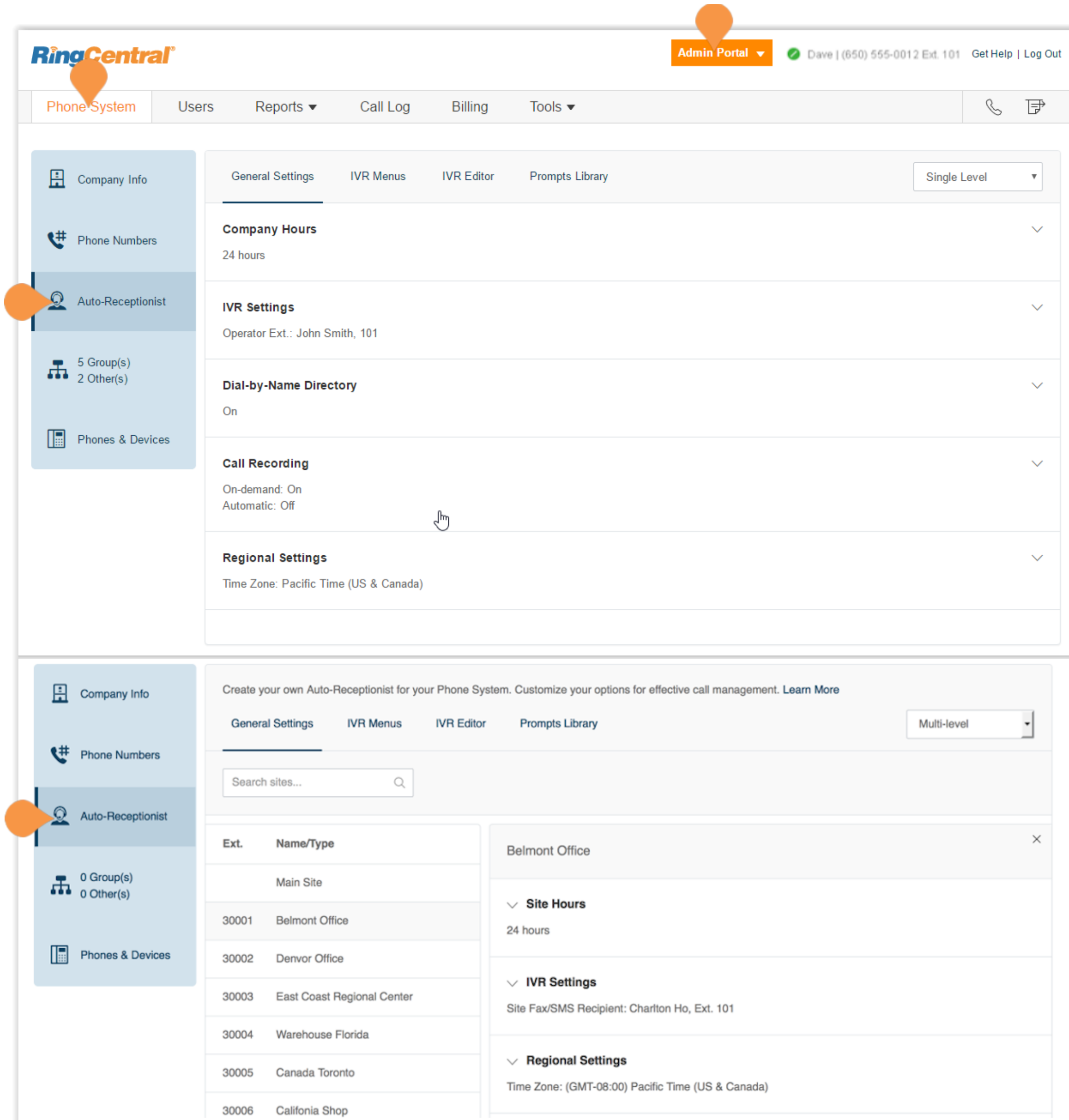
Auto-Receptionist Settings

Create your own auto-receptionist for your phone system. Customize your options for effective call management, for example: choose your company hours, set your company greeting, define rules for call handling and more.

Note: The auto-receptionist defaults to IVR Mode: single level. You can change the IVR mode to multi-level for a more intricate IVR menu. Once the settings are changed to multi-level IVR mode, options are slightly different. For more information see "Planning for Interactive Voice Response (IVR)" on page 49.

Manage Auto-Receptionist with Multi-Site Support

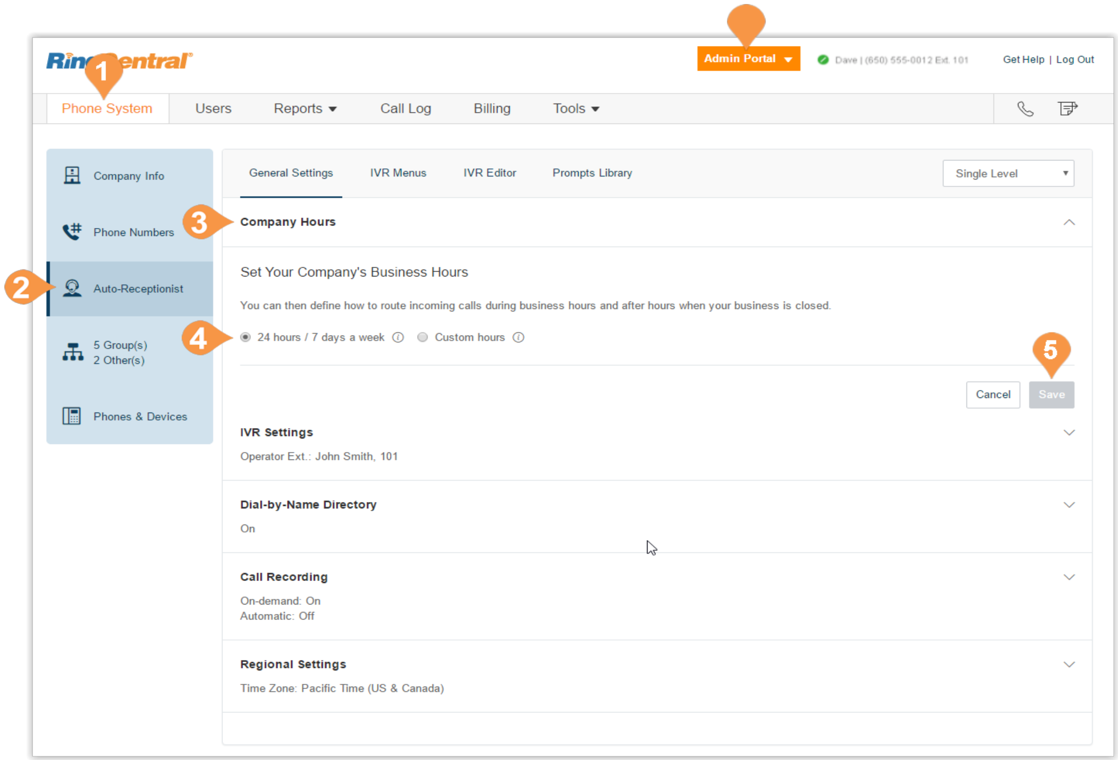
When you have enabled RingCentral Multi-Site Support, the user interface displays the auto-receptionist for each of the sites' auto-receptionist with individual business hours, custom rules, IVR settings and regional settings. For more information on RingCentral Multi-Site Support, see Multi-Site Settings. To create a new site, see Create a New Site.



Company Business Hours

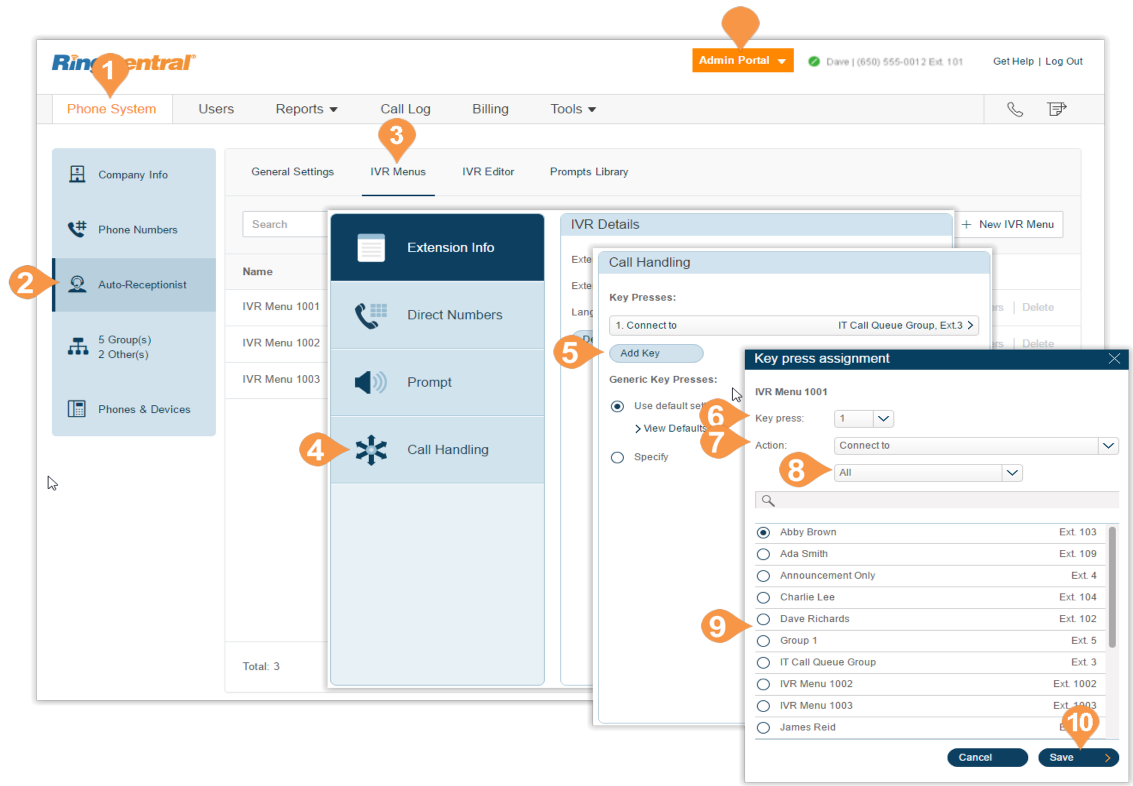
Customize your company's business hours. You can specify the opening and closing time for each day of the week or select 24 hours. This establishes the settings for the Business Hours and After Hours tabs in other settings areas (such as call queue settings and user settings).

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select **Company Hours**.
4. Set your Company Hours to:
   a. **24 hours** to have incoming calls handled the same way all the time.
   b. **Custom hours** lets you specify hours for each day of the week. You can also set separate call-handling rules and greetings for Business Hours and After Hours.
   To copy hours from one day to all weekdays, or to the entire week, select **Copy Settings to Weekdays** or **Copy Settings to All Days**.
5. Click **Save**.



Company Call Handling

The Auto-Receptionist greets callers with a recorded message when they call your company. Your Auto-Receptionist is initially set to play a default greeting with your company name using text-to-speech technology. You can set a custom greeting by recording through your phone or computer or by uploading a sound file. You can also connect the Auto-Receptionist calls directly to an extension of your choice.



Set Call Handling:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus** and select one of them. The **IVR Details** pop-up appears.
4. Click **Call Handling.**
5. Click **Add Key**. The **Key Press Assignment** pop-up appears.
6. Set the **Key Press**.
7. Select a **Connect to** action.
   - Transfer to voicemail of
   - Connect to dial-by-name directory
   - External transfer
8. Then select to whom the setting will apply.
   - All
   - IVR Menus
   - Users
   - Groups
   - Others
9. Select **Users**.
10. Click **Save**.

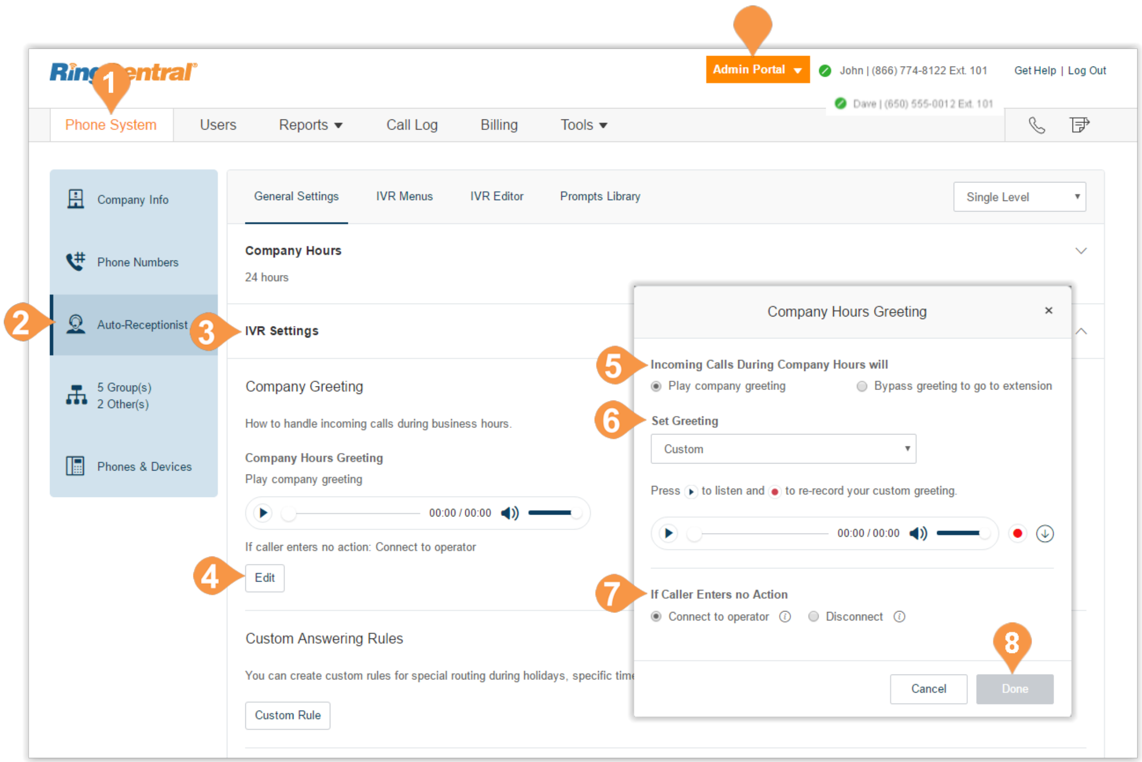
You can also use the Visual IVR Editor to configure call handling settings. Learn more about the "Visual IVR Editor " on page 59.

Company Greeting and Menu

The Company Greeting provides additional call handling options, including hearing the **Default** greeting and recording a **Custom** greeting.

Set a Company Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **IVR Settings**. **Company Greeting** appears under IVR Settings.
4. Click **Edit** under Company Greeting. The **Company Hours Greeting** pop-up appears.
5. Set the **Incoming Calls During Company Hours will** to one of these:
   - Play company greeting
   - Bypass greeting to go to extension
6. For **Set Greeting**
   a. **Default**: Select **Default** and set the language the greeting for **View In**.
   b. **Custom**: Select **Custom** to set your custom recording:
   - Follow the directions for "Recording Greetings and Messages" on page 68.
7. Under **If caller enters no action,** choose **Connect to an operator** or **Disconnect**
8. Click **Done**.



Regional Settings

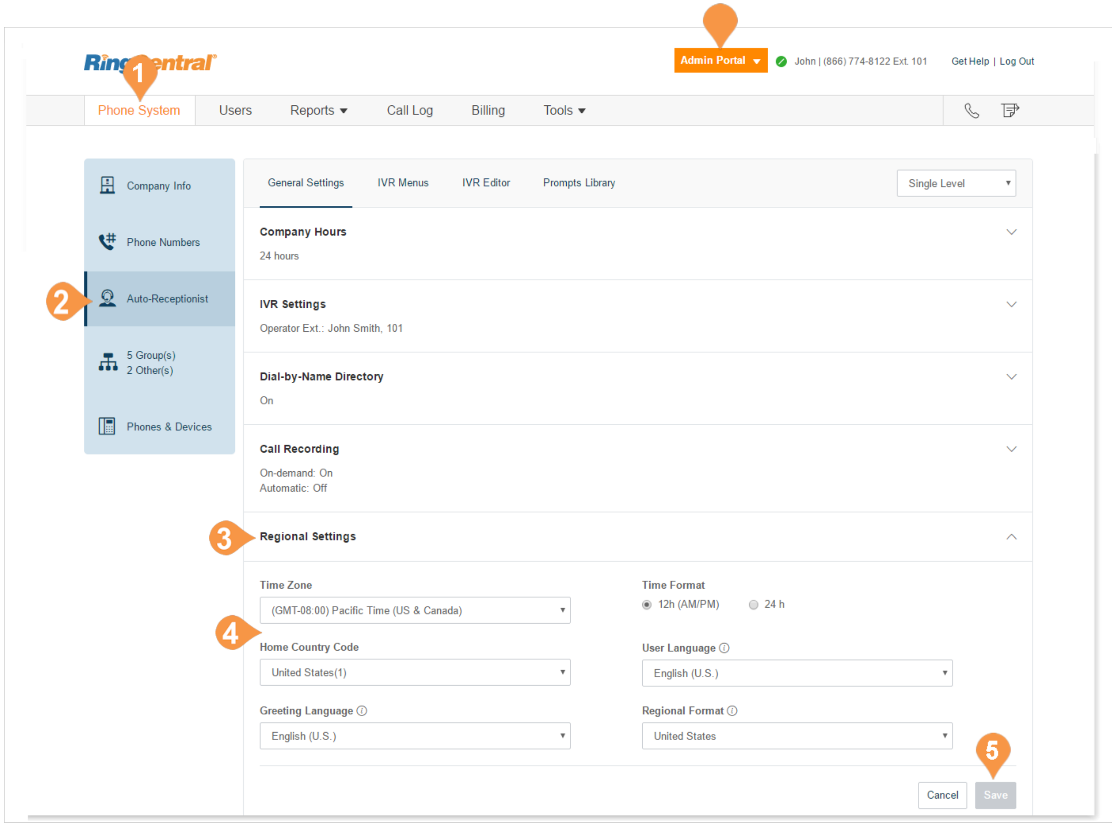
Set your time zone in Regional Settings. Typically, your time zone is linked to the area code of your main company number. For example, for area code 650 (California), the time zone defaults to Pacific Time. If you are not physically located in your area code, you may want to change your time zone.

You can also set the following Regional Settings:

- Time Zone
- Time Format
- Home Country Code
- User Language
- Greetings Language
- Regional Format

To configure regional settings:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Regional Settings**.
4. Under **Regional Settings**, select options:
   - Select your **Time Zone**.
   - Select **Time Format** as 12hr or 24hr.
   - Select your **Home Country Code**.
   - Select your **User Language** as the default language used for all accounts and notifications.
   - Select the **Greetings Language** as the default language you want to use for phone greetings.
   - Select **Regional Format** as the format used to show date, time, currency, and other numbers.
5. Click **Save**.

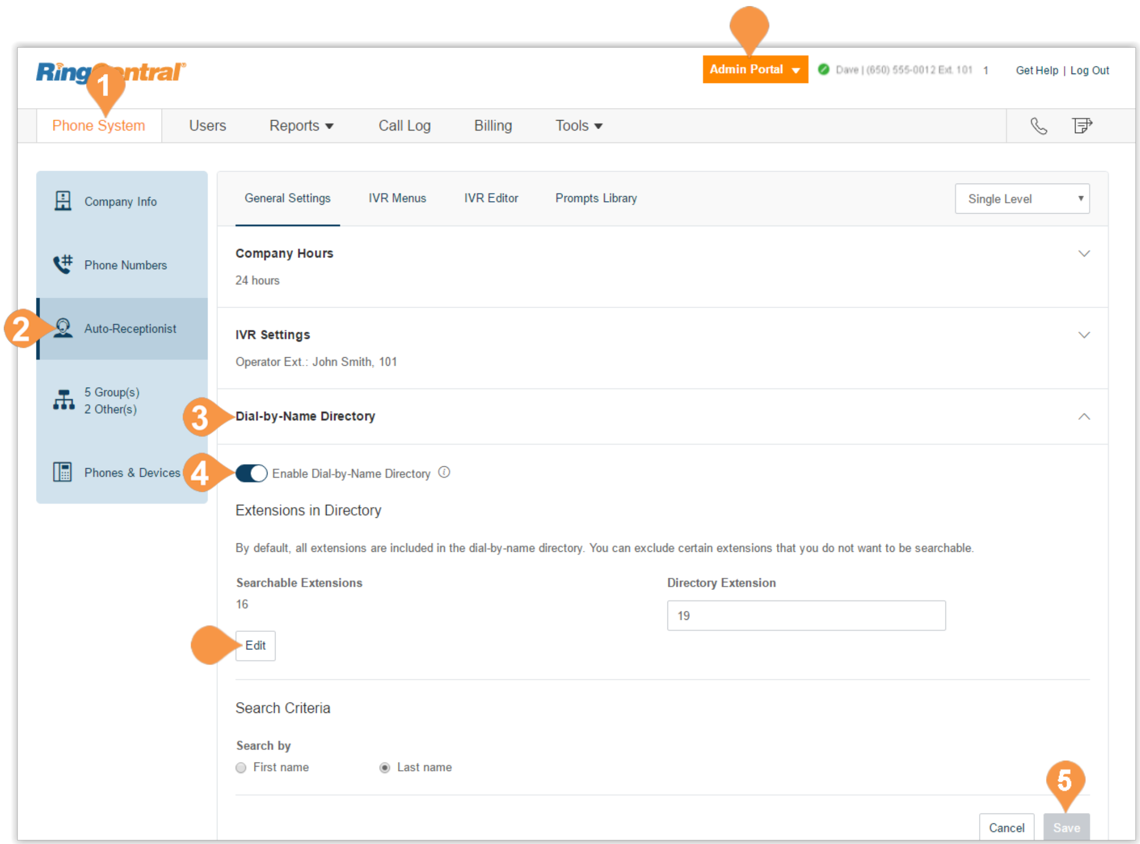


Dial-by-Name Directory

The Dial-by-Name section allows you to enable callers to search your phone system by users' first or last names using their dial pad keys.

To Configure the Dial-By-Name Directory

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Dial-by-Name Directory**.
4. Under **Dial-by-Name Directory**, set the slider button to **On**. Select options for dialing by name:
   - By default, all extensions are included in the directory.
   - To limit included extensions, under **Extensions in Directory**, Click **Edit**. Then select the extensions you want to include in the Dial-by-Name Directory
5. Click **Done**.



Operator Extension

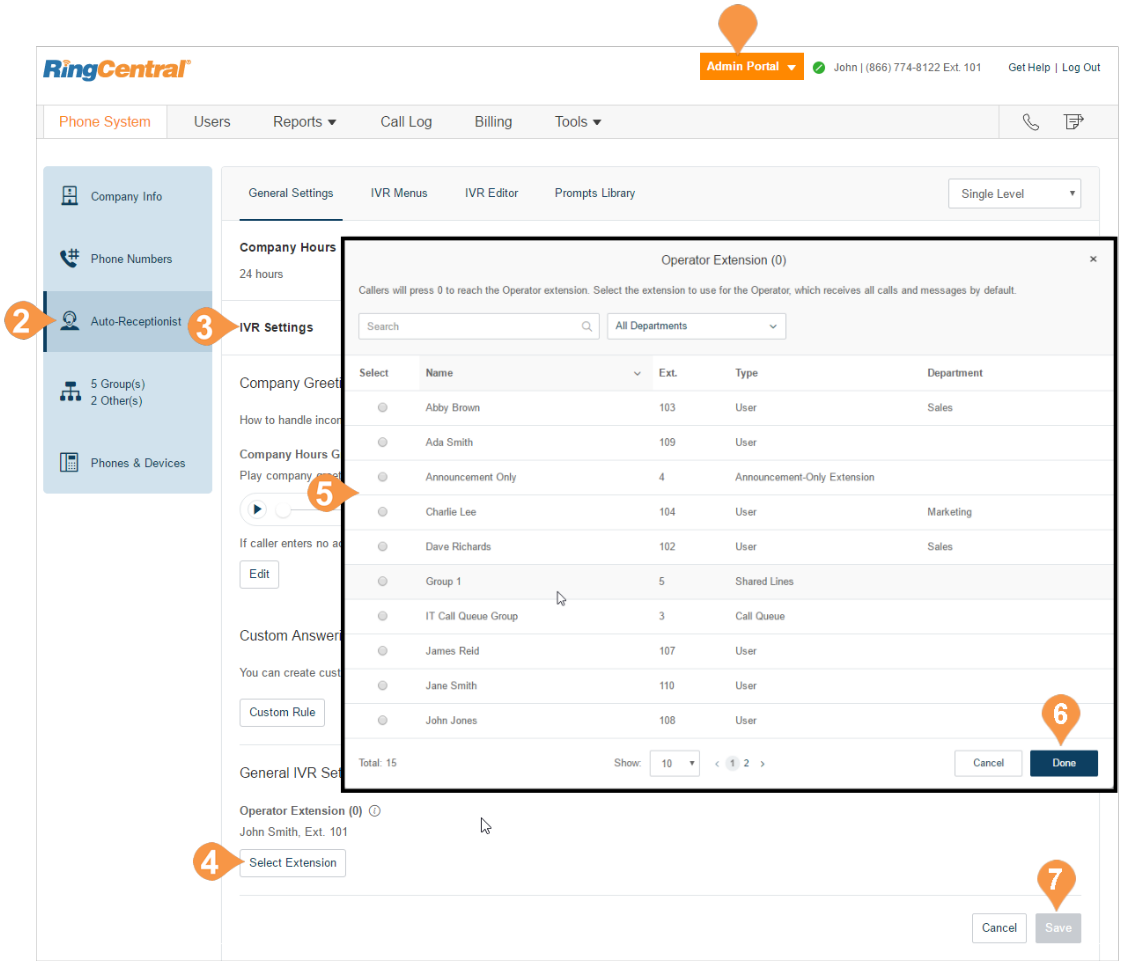
Select the extension to use for the operator, which receives all calls and messages by default. The operator extension is, by default, extension 101.

Note: Be careful when changing this setting, as the operator is the default call recipient when no other extension is dialed.

To reset the Operator Extension,

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Select **IVR Settings**.
4. Under **General IVR Settings**, click **Select Extension**. The **Operator Extension** pop-up appears.
5. Select the extension for the operator.
6. Click **Done**.
7. Click **Save**.

The assigned Operator Extension then appears under **General IVR Settings** heading.



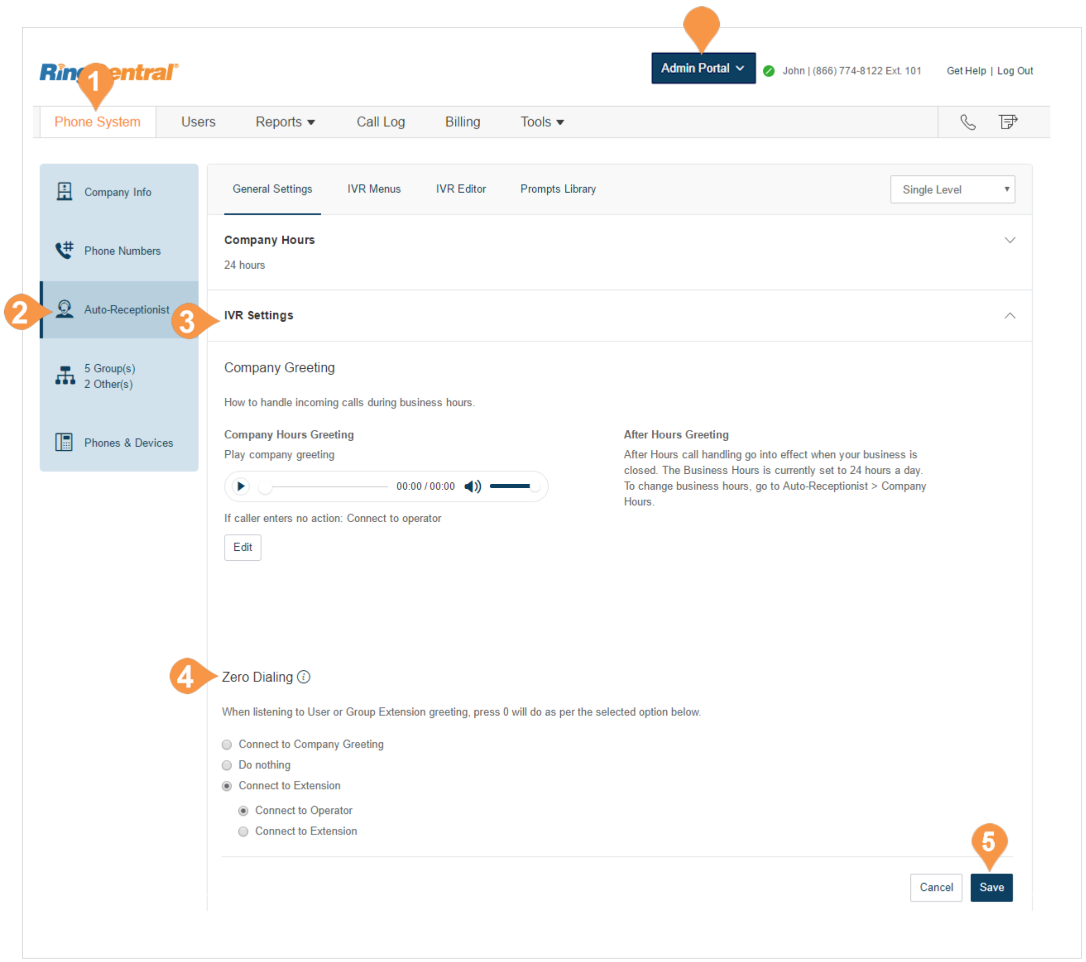
Zero Dialing

Directly routes calls to a specified destination. Three options let you designate the call handling when the caller dials zero within your IVR.

To set zero dialing,

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Select **IVR Settings**.
4. Scroll down and click **Zero Dialing** .
5. Select one of three options:
    - **Connect to Company Greeting**
    - **Do Nothing**: the system ignores any '0' dialed by the caller and continues uninterrupted. This applies regardless of the number of times the caller dials '0'.
    - **Connect to Extension**: choose from **Connect to Operator** or **Connect to Extension**

      If you choose **Connect to Extension**, the system prompts you for an extension number. Select the site operator extension. For multi-site accounts, you may configure different or multiple operators on a per-location basis.
6. Click **Save**.



Removing a Destination Extension

A warning shows that the extension being removed is in use for zero dialing and you are given the option to cancel the removal.

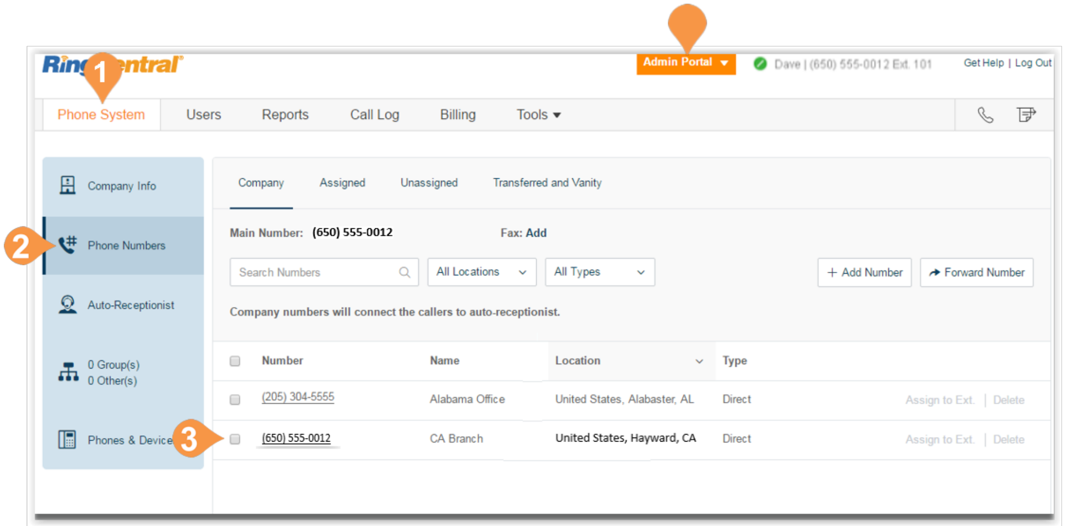
When an extension is removed, the 0-dial option defaults to the company greeting.

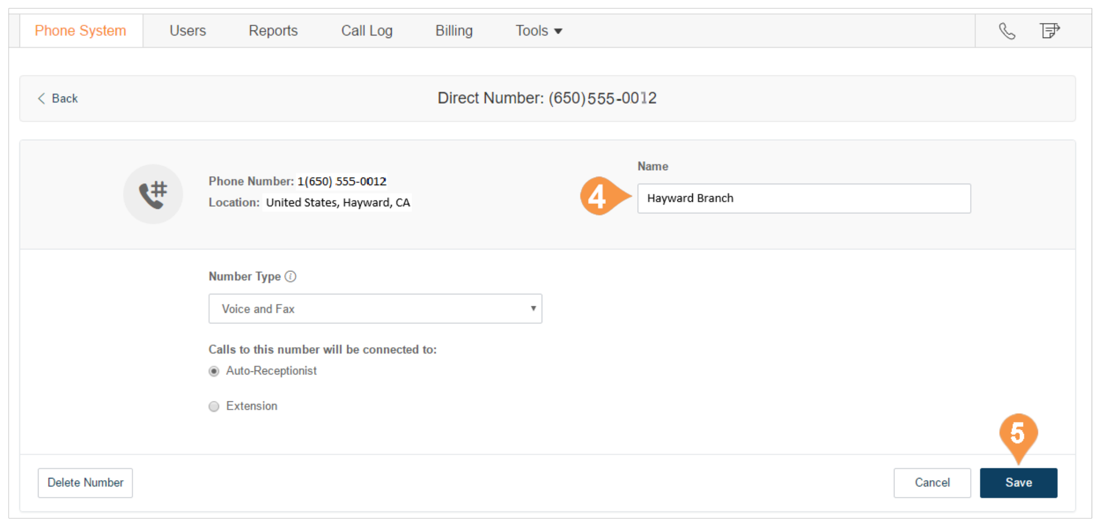
Name or Label Definition

You can label phone numbers in a meaningful way to help identify locations or users in your system*. Larger businesses with multiple locations and advanced call handling rules might involve selecting from lists of numbers. Many numbers may appear similar unless they are renamed. An admin can assign an alternative name to a particular number using the following steps:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click the phone number to which you want to apply a label. The **Direct Number** window opens.
4. Enter the label text in the **Name** field.
   - You can designate the kind of number by using **Number Type**.
5. Click **Save**.

*This option is available for Ultimate users.





On-demand Call Recording

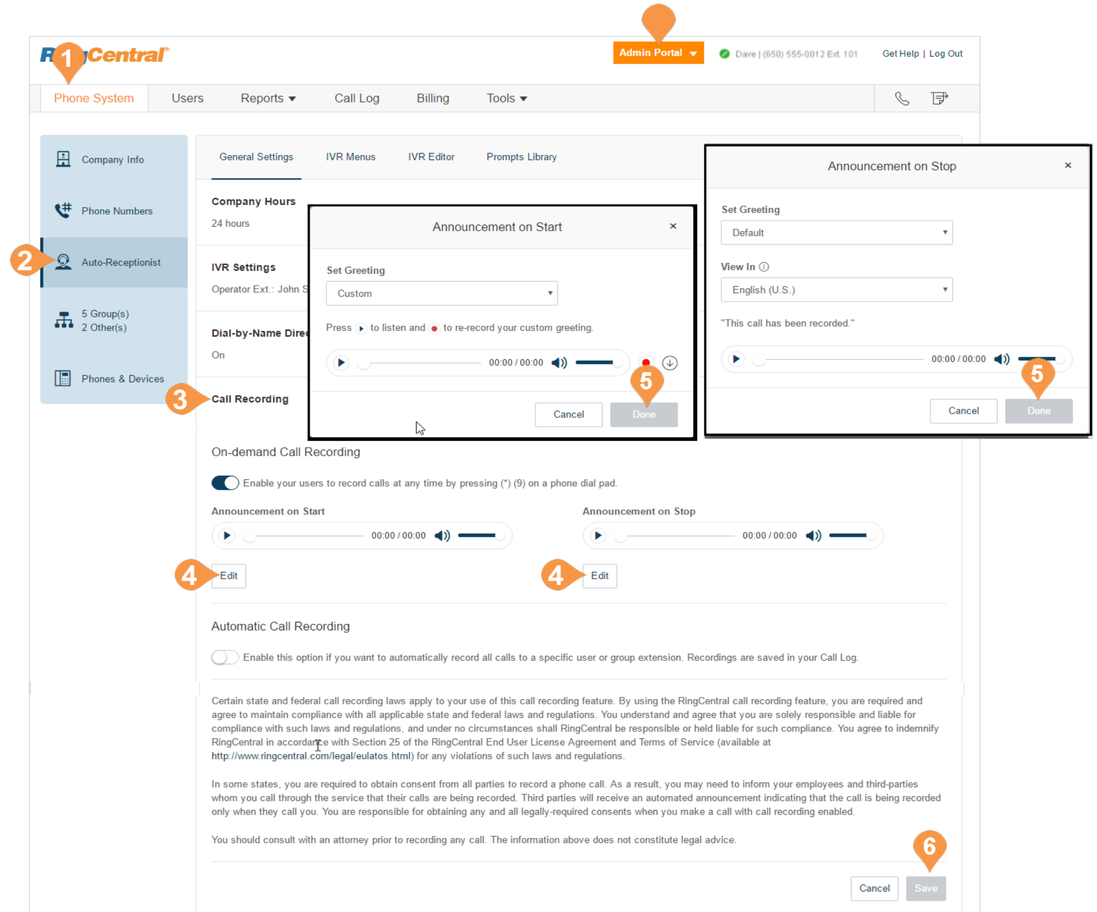
On-demand Call Recording makes it easy for RingCentral users to record calls they make or receive. When you enable On-demand Call Recording, users can activate it by pressing *9 on their phone's dial pad. NOTE: State and federal laws require that your callers hear a call-recording notification before and after a call is recorded. As an administrator, you need to ensure your company's call recording procedures comply with federal and state laws; RingCentral is not responsible for your company's compliance.

Choose an On-demand Call Recording Announcement

This explains how to select a particular recording announcement once On-demand call recording is enabled.

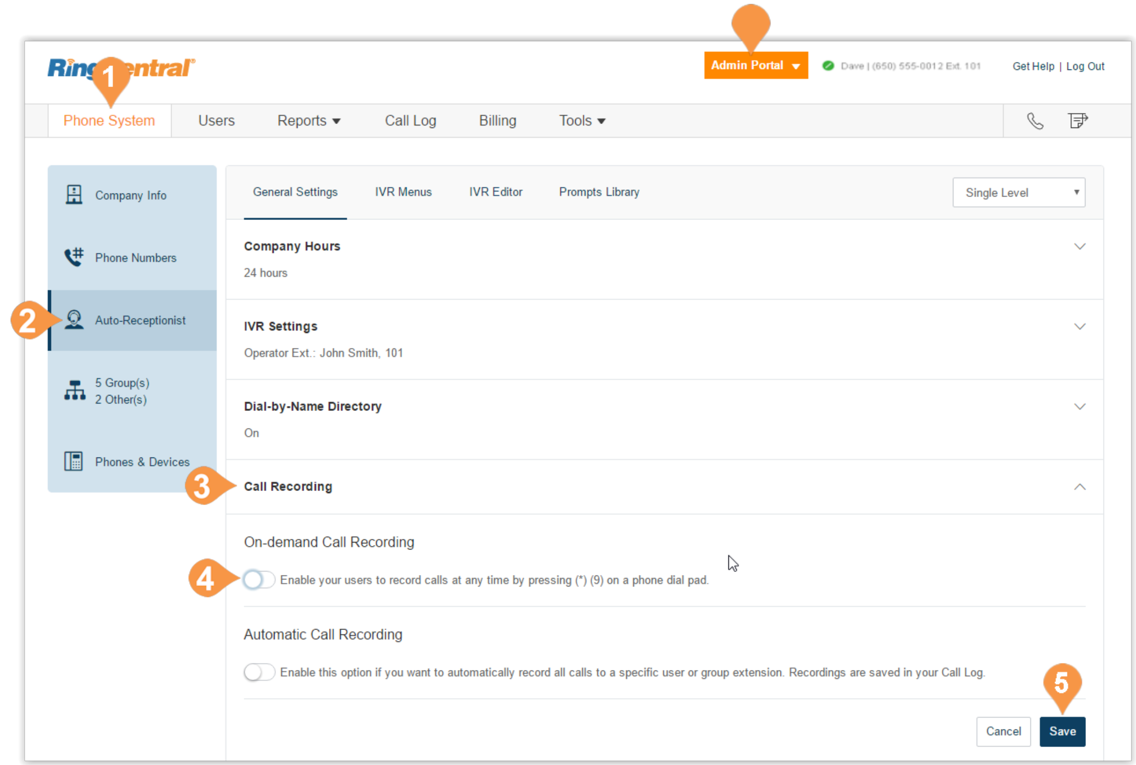
1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**. Slide the button on for **On-demand Call Recording**.
4. Click **Edit** to change,
   - Announcement on Start
   - Click **Set Greeting** and choose **Default** or **Custom**.
   - Click **Done**.
   - Announcement on Stop
     Click **Set Greeting** and choose **Default** or **Custom**.
     Click **View in**, choose the language for viewing the message text.
5. Click **Done**.
6. Click **Save**.

To enable On-demand call recording, see page 45.



Enable On-demand Call Recording Announcement

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Move the slider button to the right next to, **Enable your users to record calls at any time by pressing (*) (9) on a phone dial pad.**
5. Click **Save**.



Automatic Call Recording*

Automatic Call Recording allows you to record incoming and outgoing calls automatically. You can also play back the recordings or download the recorded call logs for sales and support training, compliance, etc.

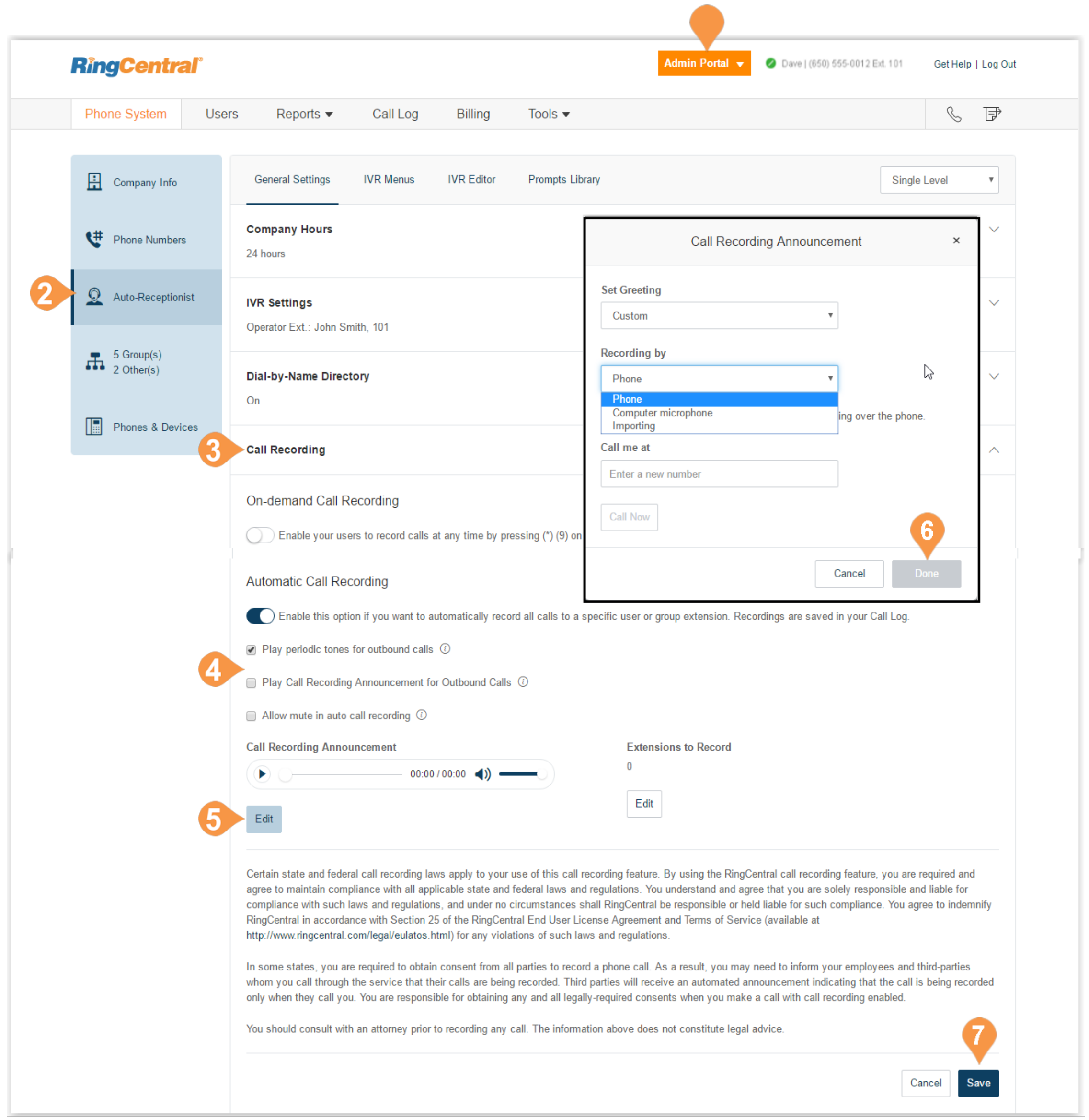
NOTE: State and federal laws require that your callers hear a call-recording notification before and after a call is recorded. As an administrator, you need to make sure your company's call recording procedures comply with federal and state laws; RingCentral is not responsible for your company's compliance.

Choose an Automatic Call Recording Announcement

First enable automatic call recording. See page 48.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
   - Ensure that Automatic Call Recording is on.
4. Click boxes for the desired options:
   - **Play periodic tones for outbound calls**
   - **Play Call Recording Announcement for Outbound Calls**
   - **Allow mute in auto call recording**

   You can also listen to your recording announcement or specify extensions to record.
5. Click **Edit** to select the call recording announcement. The Call Recording Announcement pop-up appears.
   - Select **Default** to use the provided greeting.
   - Select **Custom** to record a greeting.
6. Click **Done**.
7. Click **Save**.



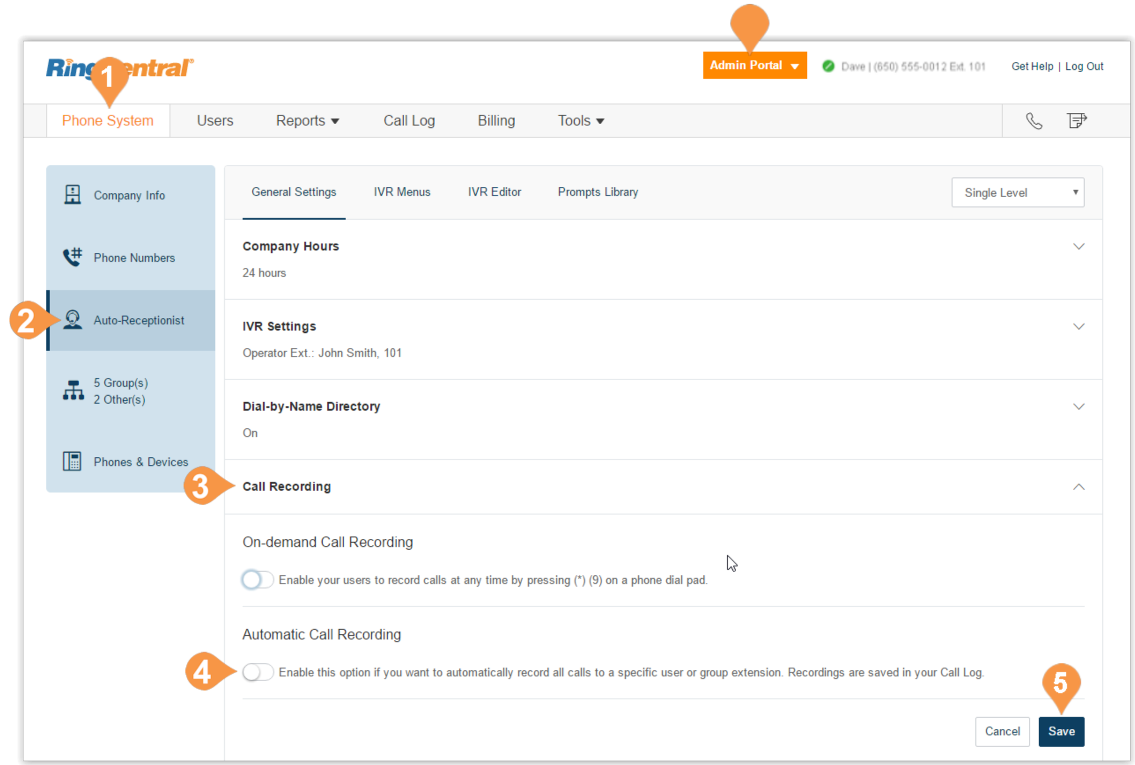
*This option is available for Office Premium and Ultimate only.

RingCentral

Enable an Automatic Call Recording Announcement

To enable the automatic call recording feature:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Slide the button on for **Automatic Call Recording**.
5. Click **Save**.



Planning for Interactive Voice Response (IVR)

In the RingCentral system, you can create a multi-level

IVR as an additional option to the Auto-Receptionist. It extends the Auto-Receptionist menu with more powerful and efficient call handling.

Layout Your Multi-level IVR Plan

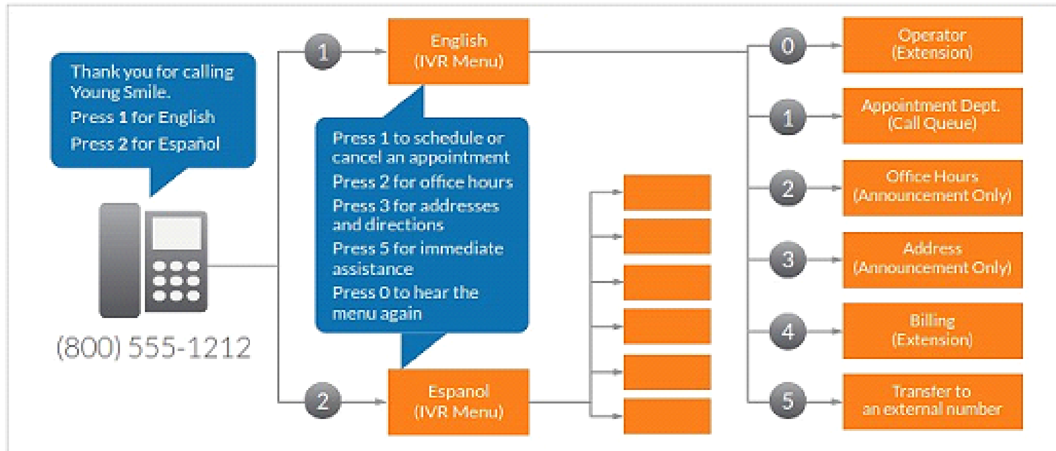
The RingCentral Multi-level IVR facility supports up to 250 menus for each account you create. It provides callers with options to self-select how they can reach a person or a department in your company. The first step in creating a multi-level IVR menu is to lay out a call-routing plan similar to the examples shown on this page.

Single-Location IVR Example

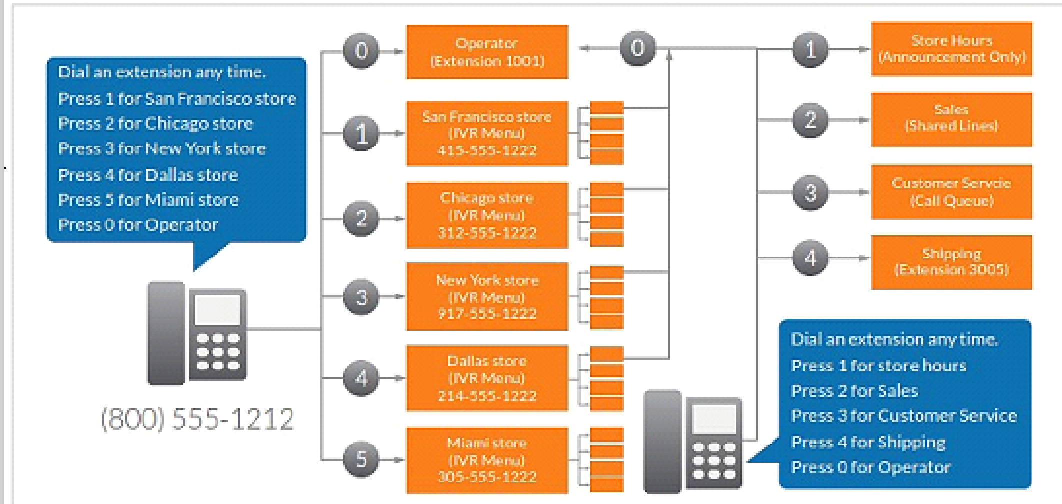
A local dentist office provides services to both English- and Spanish-speaking customers. The dental office IT Manager configures the phone routing system with identical prompts in two languages.

Multiple-Locations IVR Example

A nationwide furniture retailer has five stores located in San Francisco, Chicago, New York, Dallas, and Miami. The IT Manager sets up a toll-free number for the automated attendant system that can route incoming calls to the proper stores in the entire retail chain.



Multi-Level IVR, single location use case: bilingual dentist office

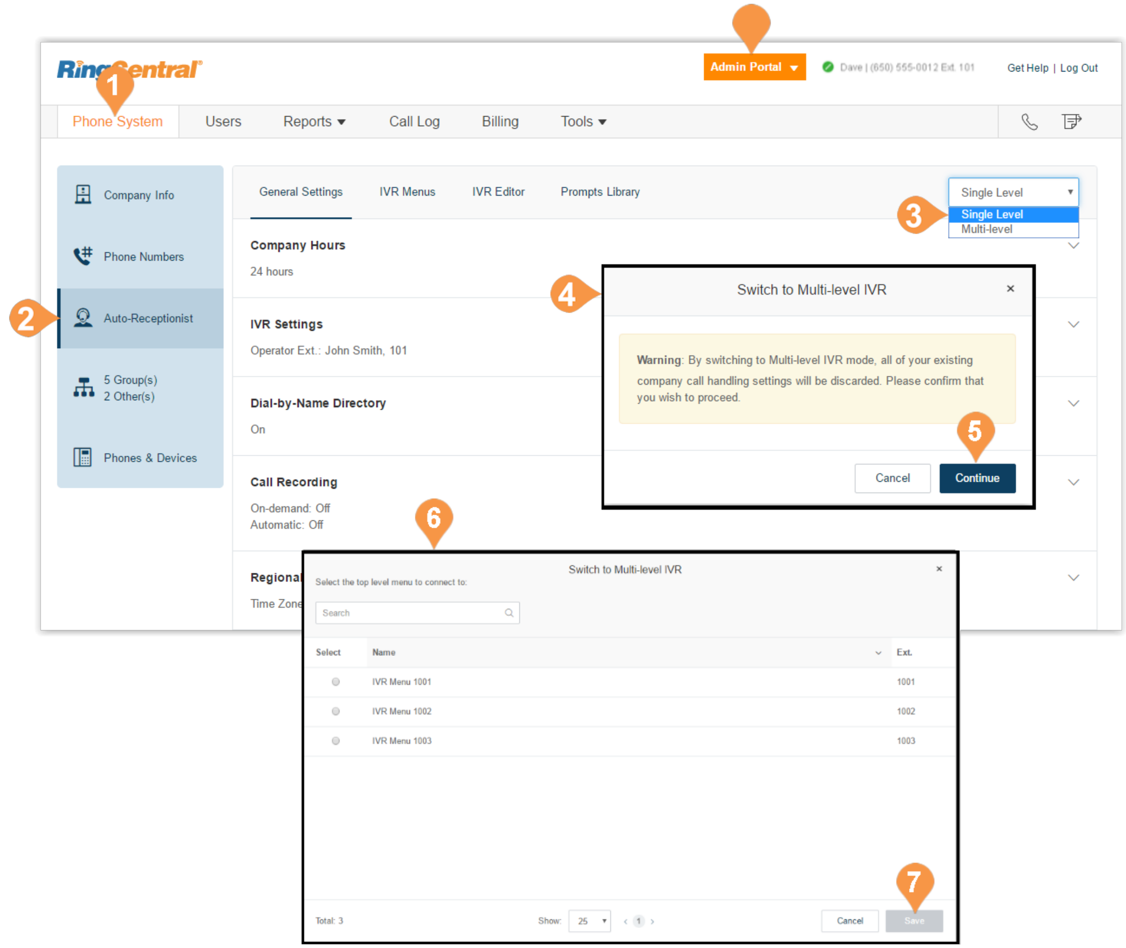


Multi-Level IVR, multiple location use case: nationwide furniture retailer

Switch to Multi-level IVR Mode

As an option, you can change your Auto-Receptionist from a single-level to a multi-level IVR to serve users at multiple locations or to provide callers with multi-lingual menus.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. On the Auto-Receptionist panel, click the **Single Level** button **Multi-level**. A pop-up will appear with a warning message. By switching to multi-level IVR mode, all of your company call handling settings will be discarded.
   Confirm that you wish to proceed.
4. Click **Continue** to confirm switching to multi-level IVR.
5. The **Switch to Multi-level IVR** pop-up appears. Do one of the following:
   - Enter a top level menu in the **Select the top level menu to connect to** search field.
   - Select the button next to one of the listed **Names**.
6. Click **Save**.



Note: NOTE: Because your call handling settings are discarded, you will need to reset your call handling settings.

Note: NOTE: Your IT department should validate and test the IVR configuration to ensure the routing and prompts in a root menu work well before connecting them to the Auto-Receptionist.

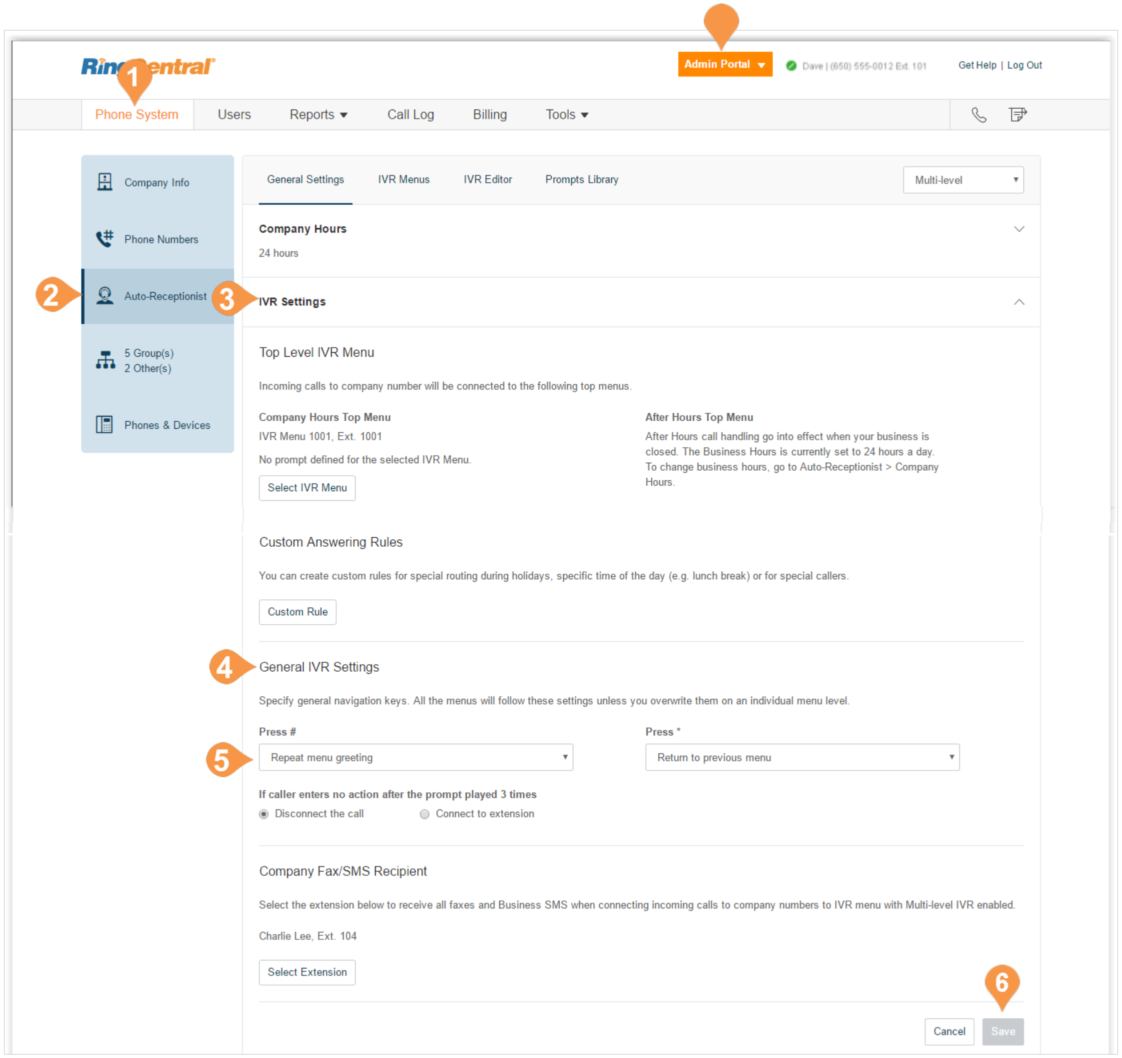
For more details, see “IVR Menus*” on page 56.

Set General IVR Settings

When you have set multi-level IVR mode, you can see general IVR settings from the Auto-Receptionist menu.

To set general IVR settings:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Select **IVR Settings**.
4. Scroll down to **General IVR Settings**.
5. Under **General IVR Settings**, select options:
   - Configure the actions for the general navigation keys. When callers press **#** (hash/ pound) or * (star/asterisk), the following actions are available:
     - **Repeat menu greeting**
     - **Return to root menu**
     - **Return to previous menu**
   - If the caller enters no action after the prompt is played three times, the following actions are available:
     - **Disconnect:** The call will be disconnected.
     - **Connect directly to an extension:** The caller is routed to the extension you specify.
6. Click **Save**.



IVR Tool*

RingCentral provides additional IVR tools to help you create and manage your IVR Menus. Auto-Receptionist consists of three parts that help you configure your IVR: IVR Menus, IVR Editor, Prompts Library.

Use the IVR tool to:

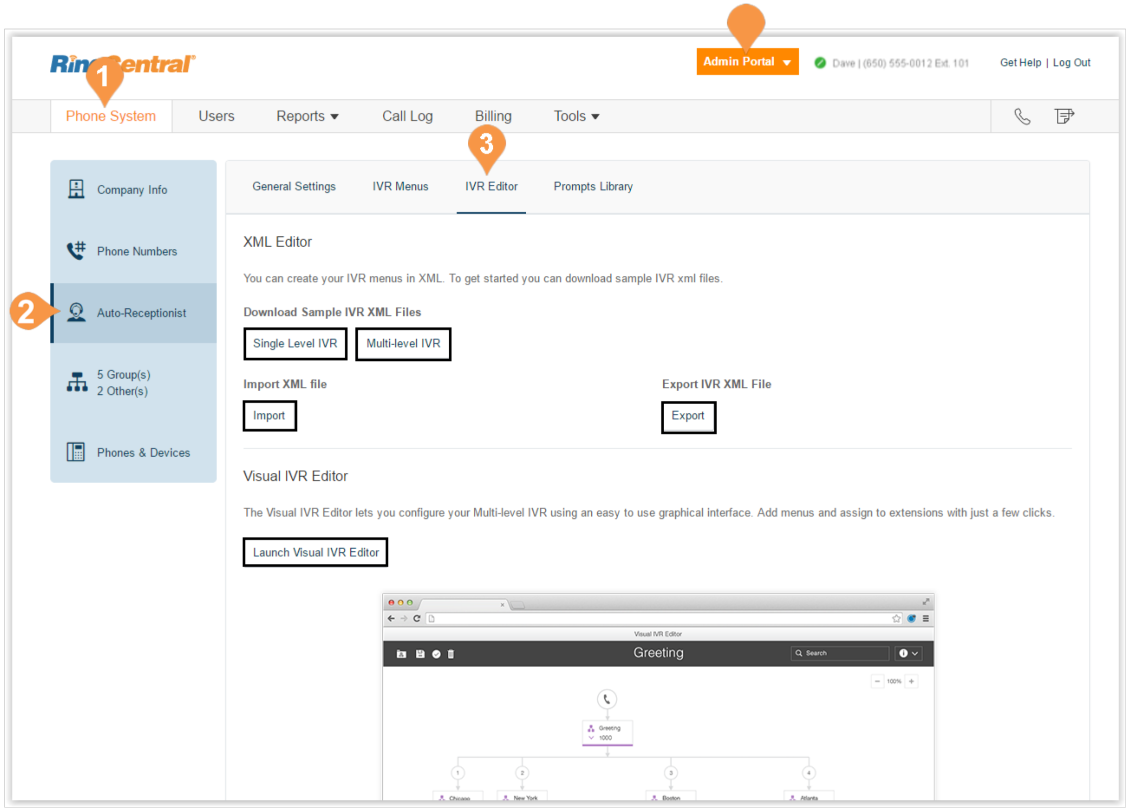
- Configure IVR menus with the Visual IVR Editor
- Import prompt recordings
- Record prompts
- Import and export XML files

Note: Any change on the IVR menu overwrites the imported XML file. It is suggested that you export and save a new XML file after making changes.

Access the IVR Tool by using the following steps:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Select the **IVR Editor** tab.

*Available for Office Premium and Ultimate users only.



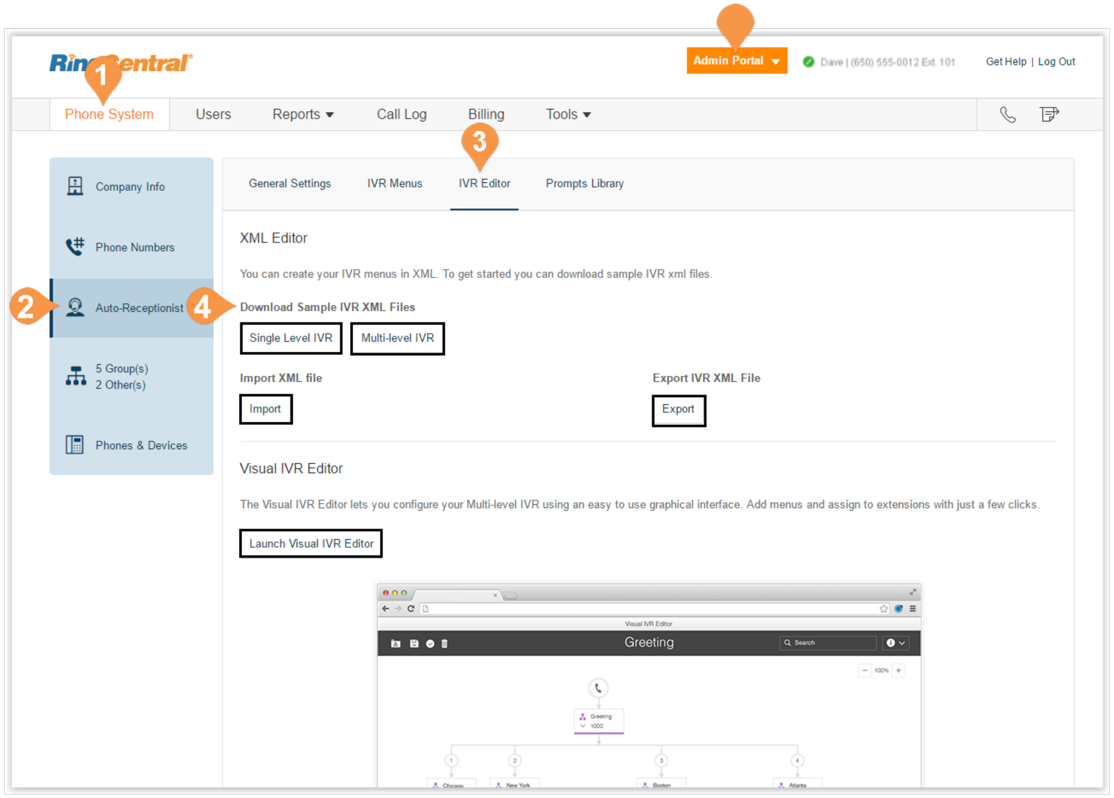
Import or Export XML Files

In the XML section, you can import and export XML files for your IVR. Your IVR Menus are validated by RingCentral once you import an XML file.

Download a Sample XML File

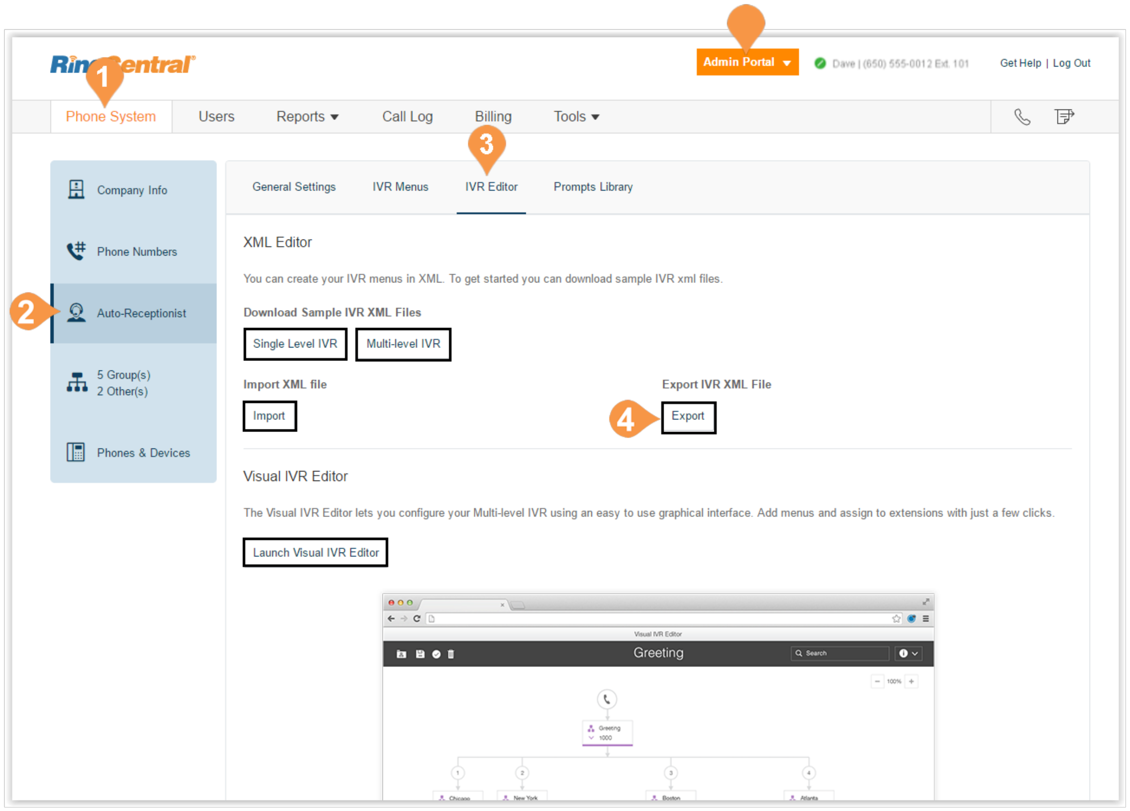
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab. the XML Editor displays.
4. Under **Download Sample IVR XML Files**,
   - Click Single Level IVR
   - Click Multi-level IVR

   The sample XML file is downloaded to your browser.



Export an XML File

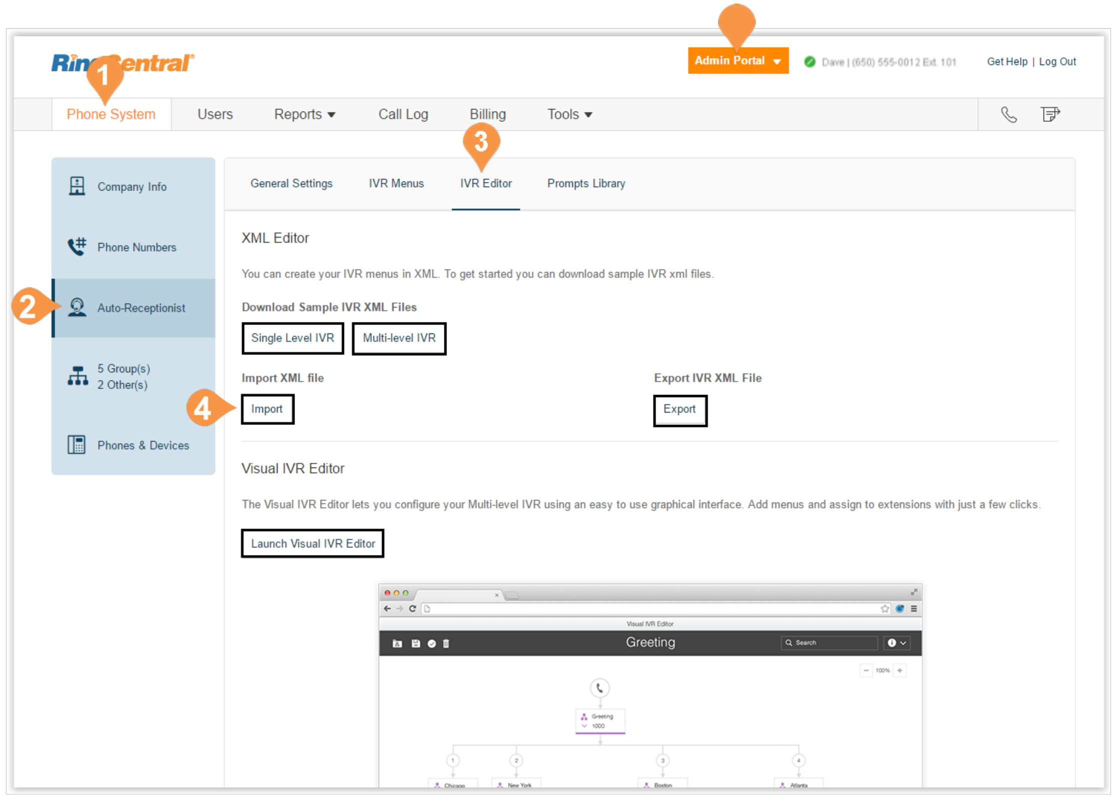
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist.**
3. Click the **IVR Editor** tab. The XML Editor displays.
4. Under **Export IVR XML File**, click **Export.** The sample XML file is exported to your browser.



Import an XML File

1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab. the XML Editor displays.
4. Under **Import XML file**, click **Import** to browse and locate the XML file. then click **Import**.

RingCentral detects configuration issues as soon as you click **Import**. You can manually fix the errors in the XML file and upload it again or you can click **Accept and Continue** to manually fix the errors using your RingCentral Online account.



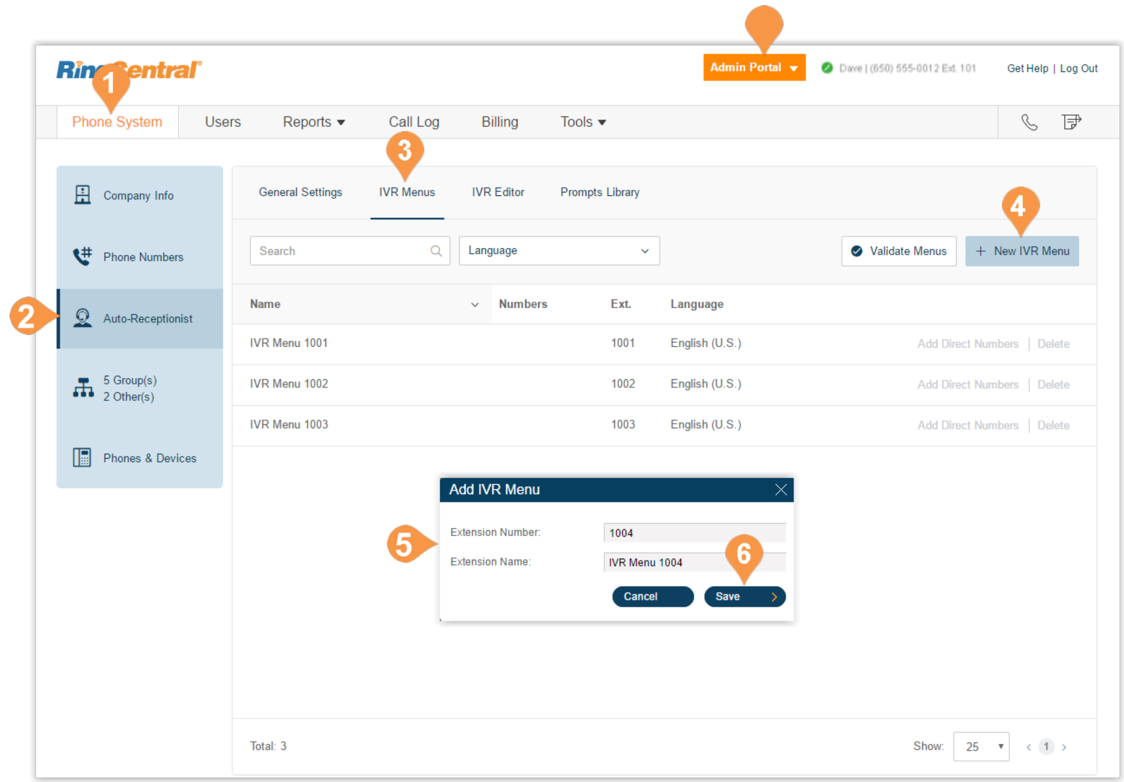
IVR Menus*

RingCentral offers various tools to help manage and create IVR (interactive voice response) menus. Administrators can add new IVR menus as shown in the following instructions, use the Visual IVR Editor, or import an XML file.

Add an IVR Menu Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Click **New IVR Menu** button The **Add IVR Menu** pop-up appears.
5. Enter the **Extension Number** and **Extension Name**.
6. Click **Save**.

   The new IVR Menu appears listed under the **IVR Menus** tab.



*Available for Office Premium and Ultimate users only.

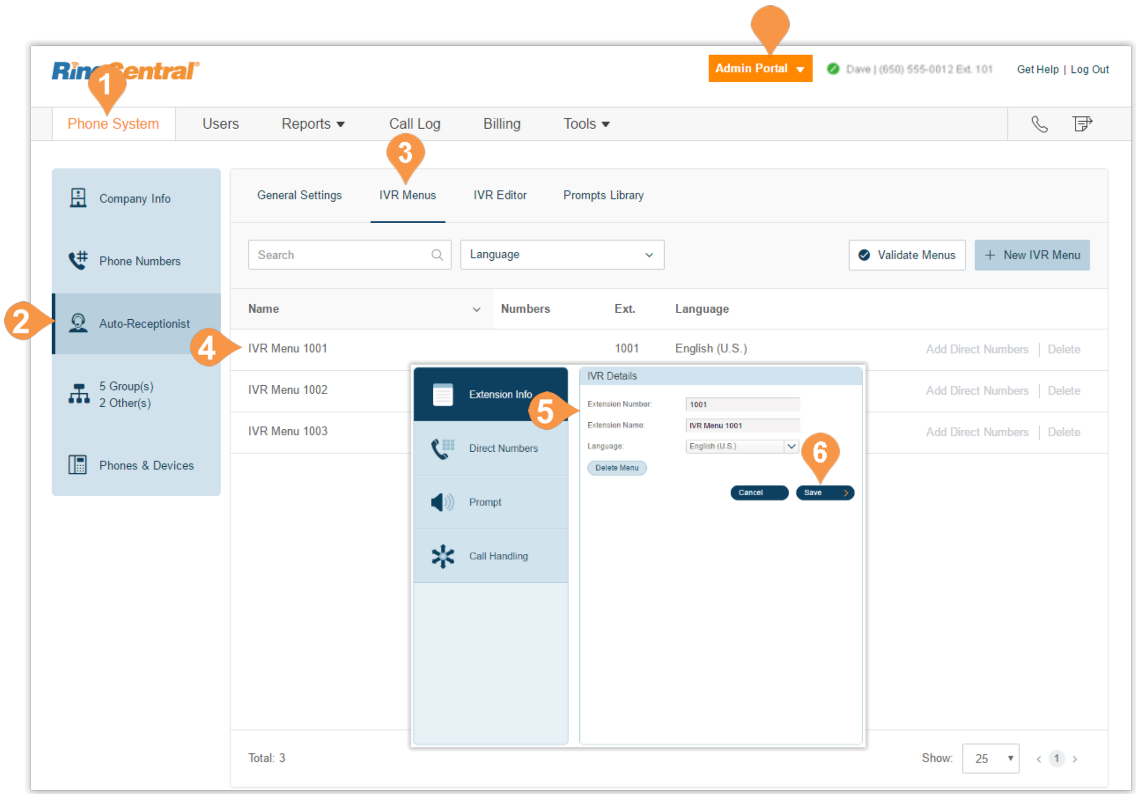
Configure an IVR Menu

After you have created an IVR Menu, configure the Extension Info, Direct Numbers, Prompt, and Call Handling.

Configure Extension Info

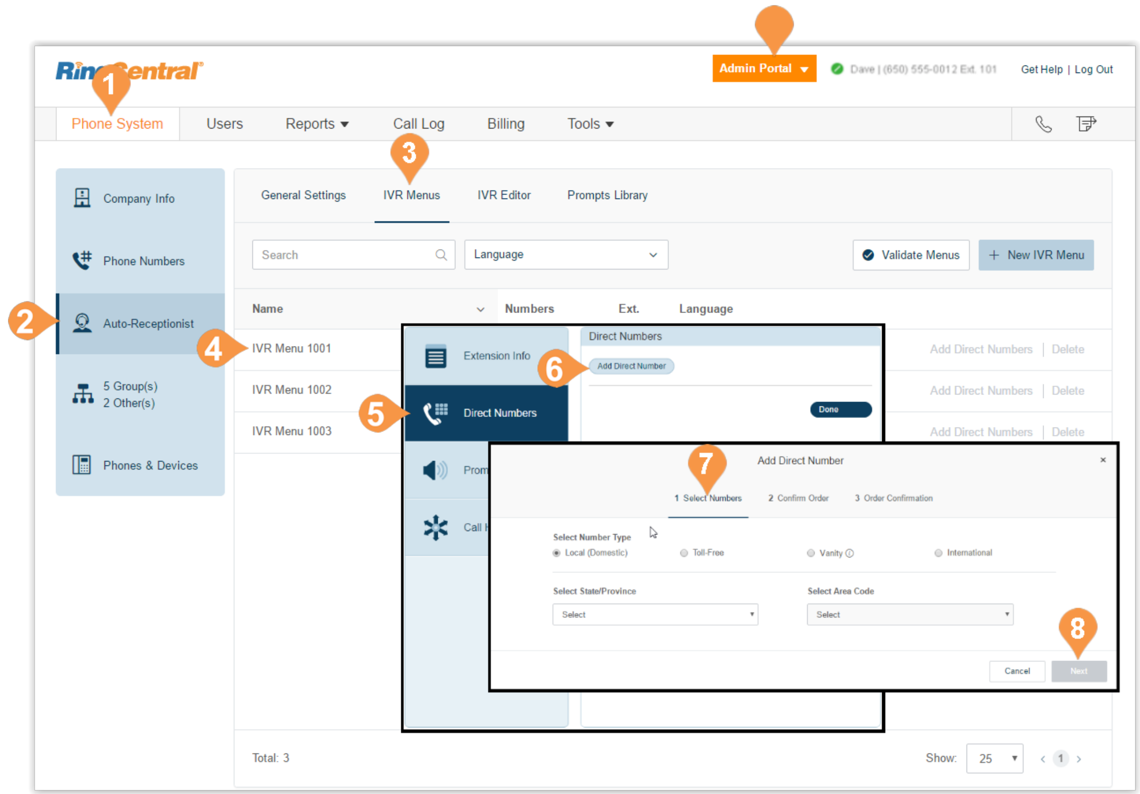
After you select an existing IVR Menu, edit your extension number, name, or delete your menu.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Select an existing **IVR Menus**. The Extension Info **IVR Details** pop-up appears.
5. Enter the **Extension Number**, **Extension Name**, and set the **Language**.
   - If you would like to delete this IVR menu, click **Delete Menu**.
6. Click **Save**.



Add a Direct Number

To add a direct number for an IVR menu:



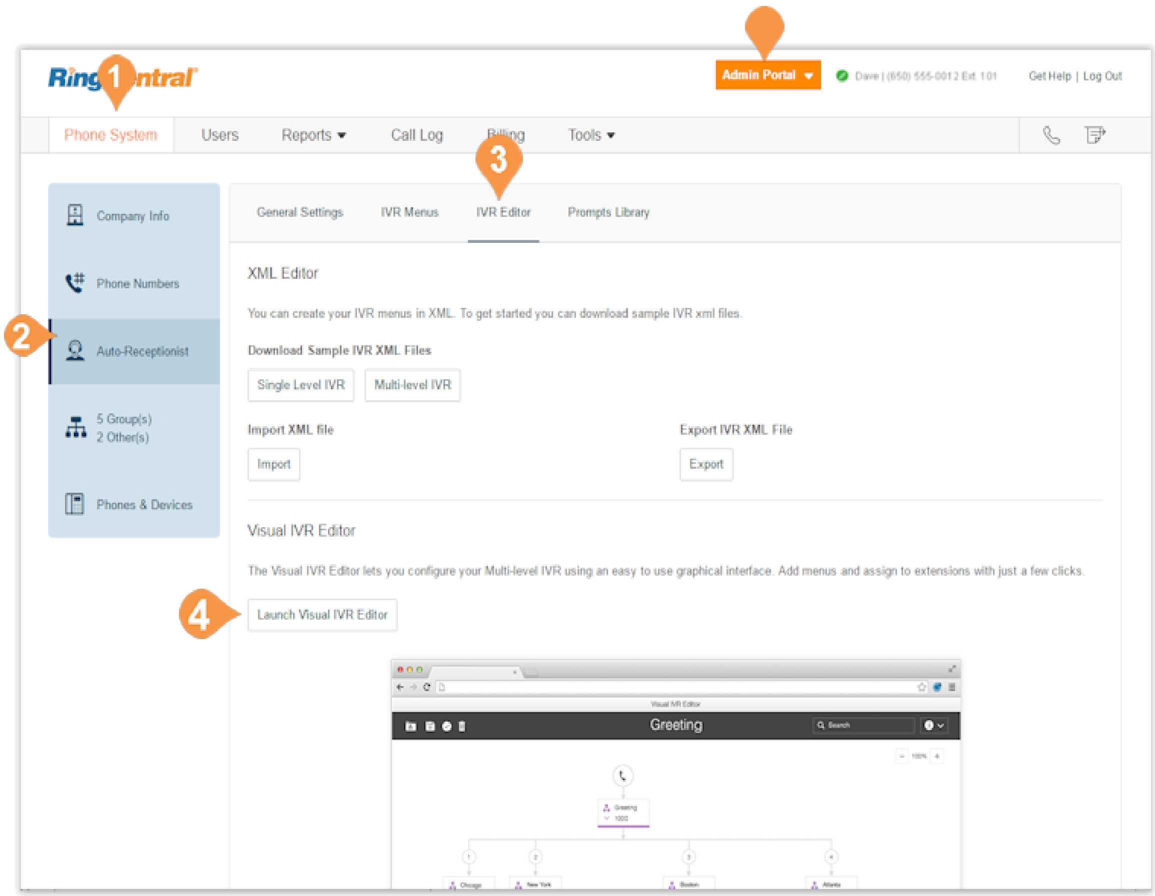
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Click an existing **IVR Menu**.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Select one of the number types. Follow these instructions for the type of number you choose:
   a. **Local (Domestic)**: Select the button for Local (Domestic). Provide the State/Province and Area Code and Select Number.
   b. **Toll-Free**: Select the button for **Toll-Free Number**. Select a Toll-Free prefix and a number from the drop-down menu.
   c. **Vanity**: Select the button for **Vanity**. Choose a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available.
   d. **International**: Select the button for **international**. Select the button next to **Geographic Number** or **Toll-Free Number**. Select the Country, call the phone number in the instructions to order an international number.
8. Click **Next** when finished choosing your number. Proceed to the completion of your order.

Visual IVR Editor

The Visual IVR Editor lets you configure your Multi-level IVR using an easy-to-use graphical interface. Add menus and assign to extensions with just a few clicks.

Launch the Visual Editor

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab.
4. Click **Launch Visual IVR Editor**. The **Visual IVR Editor** opens in a new browser tab.

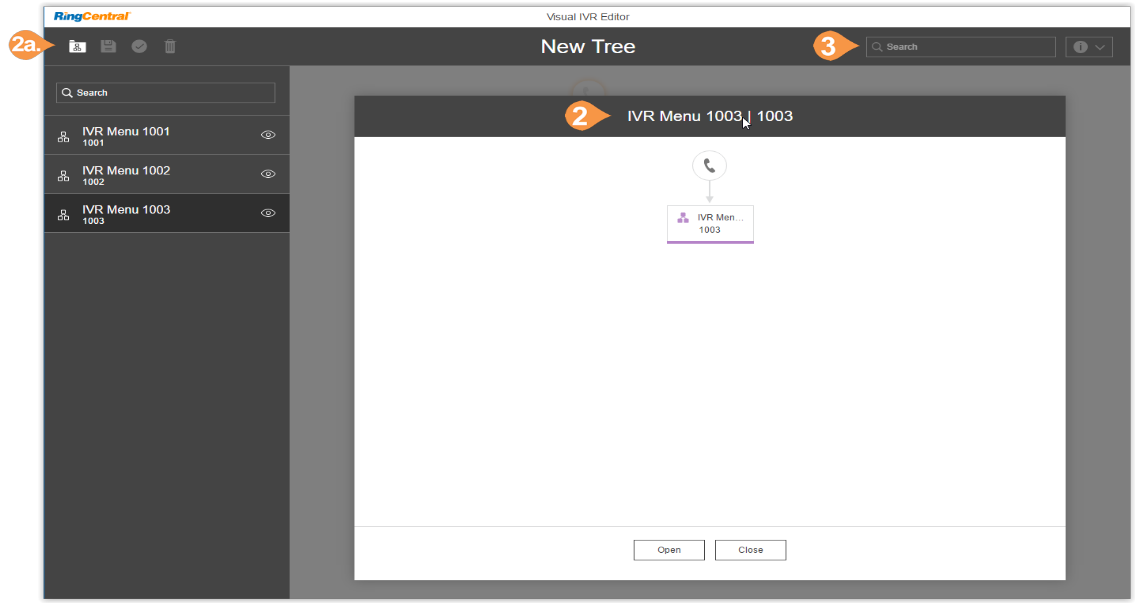


Create a New IVR Menu or Open an Existing IVR Menu

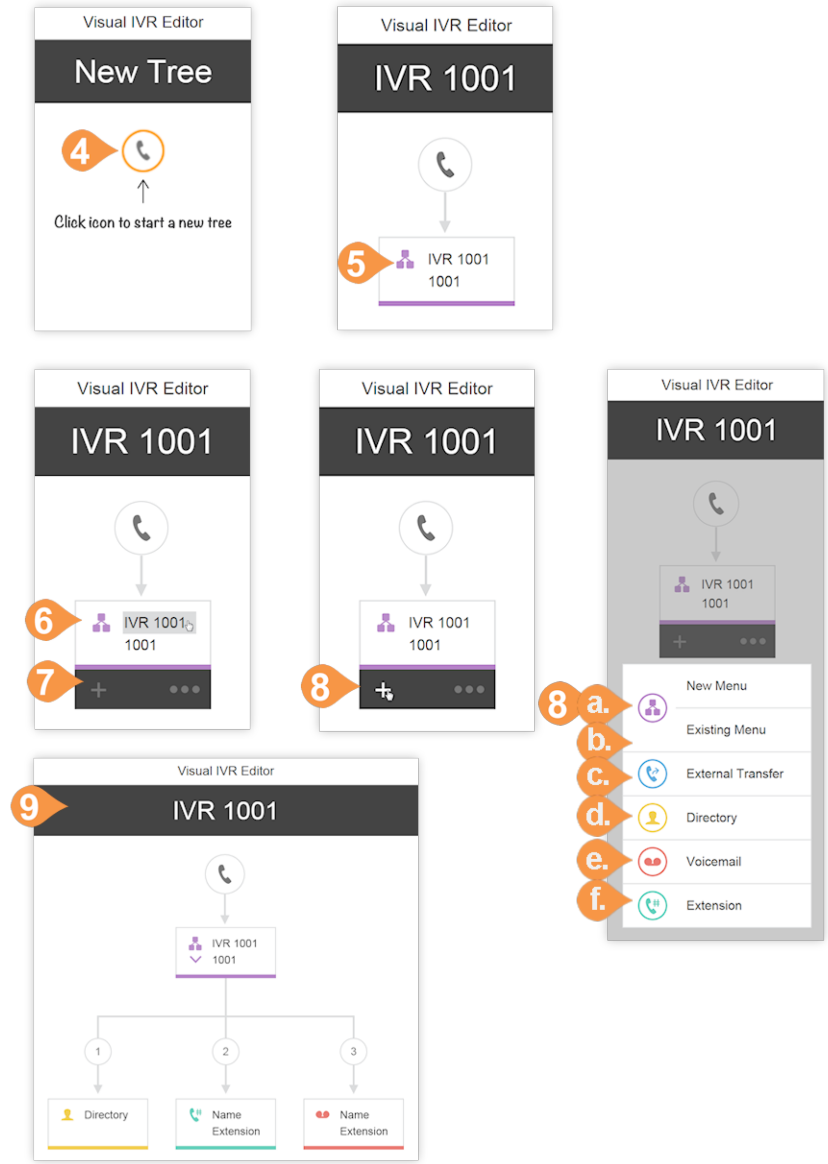
Use these steps to create a new IVR menu with the visual editor.

Open the Visual IVR Editor.

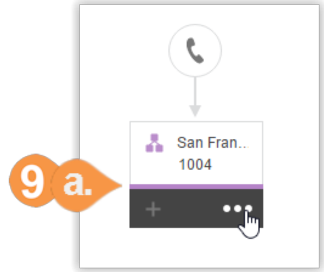
1. In the new tab, you will see your **Visual IVR Editor**. On this page, you will have a **New Tree** waiting to be created. You have the option to create a new IVR from this screen, or open an existing IVR and edit it in the Visual IVR Editor.
   a. In the upper-left corner of the screen you have icons for **Open Existing Menu**, **Save**, **Validate**, and **Clear Workspace**.
2. In the upper-right corner you have a **search bar**, an **information drop-down menu** with options for **Take a Tour** and **Learn More**, and when you are viewing an IVR menu, you will see zoom in and out buttons.

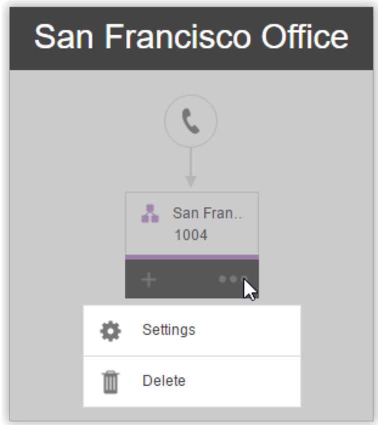


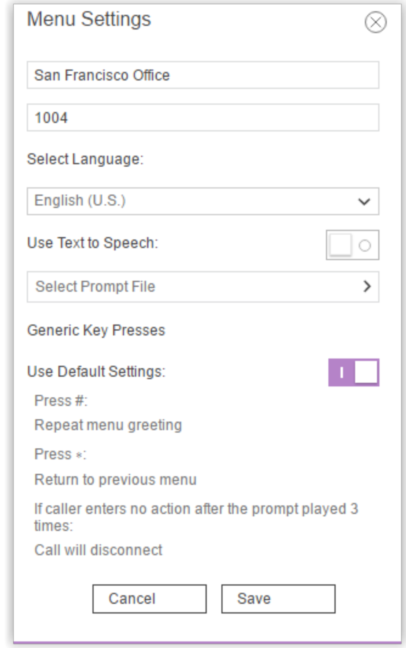
3. Click the **Phone icon** to start a new tree.
4. Your new tree will be automatically assigned a name and extension number.
5. Click the name or extension number to edit the text field and enter your preferred name and extension. Press enter when you are finished and the title will change automatically.
6. Hover over your new IVR menu to see more options.
7. Click "+" to add sub-items to your tree. Sub-items include:
   a. **New Menu**: Create a new IVR menu as an option within your tree.
   b. **Existing Menu**: Choose an existing IVR menu from a different IVR tree.
   c. **External Transfer**: Include an external number in your tree.
   d. **Directory**: Attach your company's dial-by-name directory to your tree.
   e. **Voicemail**: Give the option to leave a voicemail.
   f. **Extension**: Add a specific extension to your tree.



8. As you add sub-items to your tree, they will appear in the Visual IVR Editor. Once you have added your items to your menu, hover over an item to edit it and see more options. For some items you will see a "+" and "…" and other items will only have the trash can icon. **IVR Menus**
   - Click the IVR name and extension text fields to edit them.
   - **Click "+"** to add sub-items to your tree.
   - **Click "…"** to open the menu for Settings and Delete.
   - **Click Settings** to edit your IVR Menu settings just as you would edit them in the IVR Group settings.
   - **Click Delete** to delete this item.





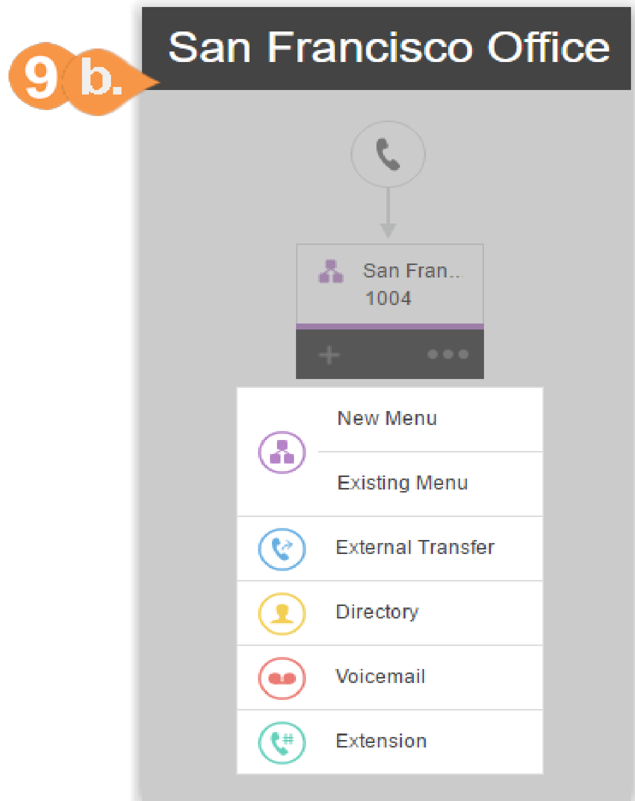


g. **External Transfer** Click the phone number text field to enter the external transfer number of your choice.
   - **Click the trash can icon** to delete this item.

h. **Directory**
   - No further configuration is needed.
   - **Click the trash can icon** to delete this item.

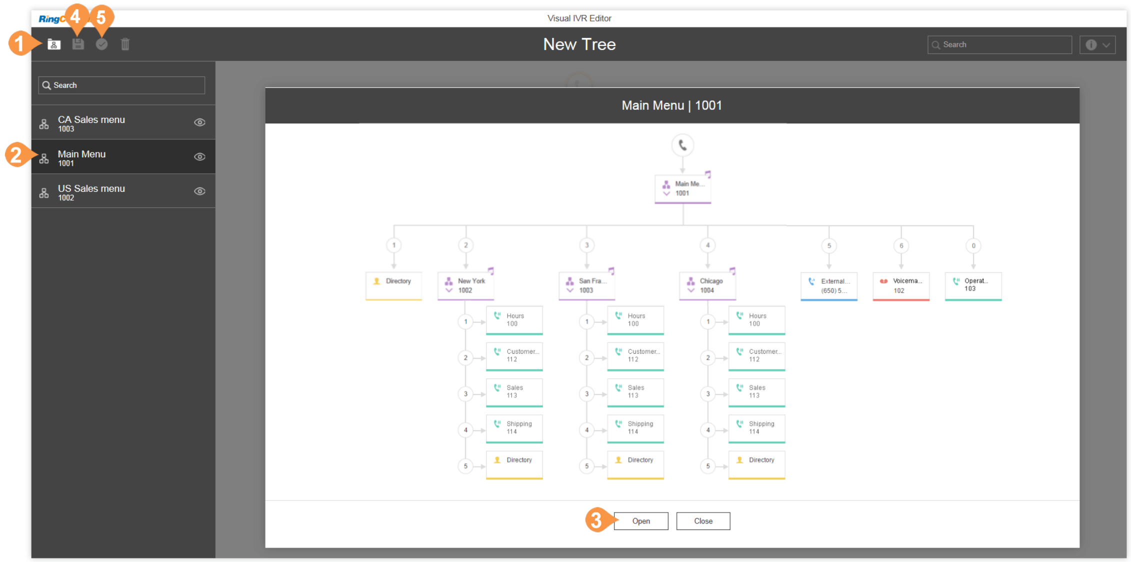
i. Voicemail
   - **Click the name or extension text fields** to open a menu to choose an existing user's extension.
   - **Click the trash can icon** to delete this item.

j. Extension
   - **Click the name or extension text fields** to open a menu to choose an existing user's extension.
   - **Click the trash can icon** to delete this item.
   - **You can also change the order and key press of an item by click on the existing number and typing a new number.**
   - **Click out to save.**



Edit an Existing IVR Menu with the Visual IVR Editor

1. From the **Admin Portal**, launch the Visual Editor, then click the **Open Existing Menu icon**.
2. Click on an existing menu to see a preview of the menu.
3. Click **Open** to be able to edit the menu in the Visual IVR Editor.
4. After editing your menu, click the **Validate icon** to check your IVR menu.
5. Click the **Save icon** once you are done editing to save your IVR.



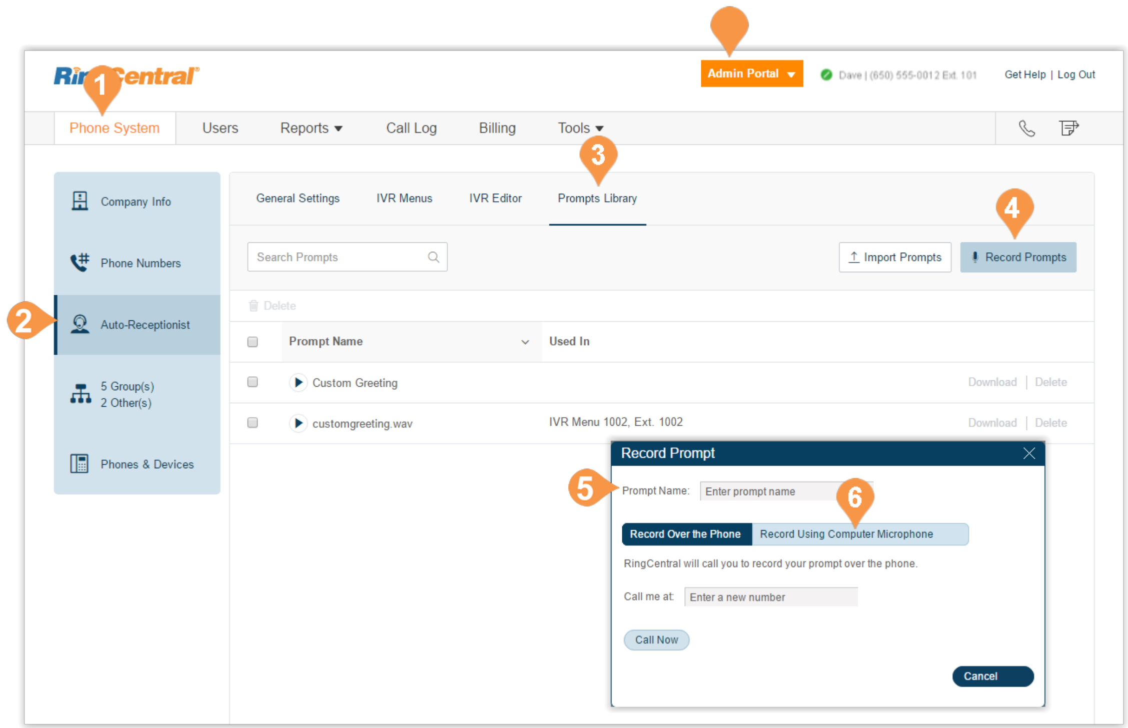
Prompts

Prompt recordings guide callers with instructions on keys to press. Prompts can be pre-uploaded and saved to the Prompt Library, which you can then set up as prompts using the IVR Tool.

There are two prompt modes: audio and text-to-speech.

- Audio prompts are voice recorded.
- Text-to-speech prompts are written by you, then RingCentral's automated system reads the prompt to your callers.

Note: An IVR menu can function independently from the Auto-Receptionist, so it does not have to be set up for an Auto- Receptionist greeting.



Record an Audio Prompt

To record a new audio prompt for your system,

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select the **Prompts Library** tab.
4. Click **Record Prompts**. The **Record Prompts** pop-up appears.
5. Enter a name for your prompt in the **Prompt Name** field.
6. Select one of these prompt methods and follow the on-screen instructions:
   - Record Over the Phone
   - Record Using Computer Microphone.

Follow the remaining on screen instructions to record your prompt.

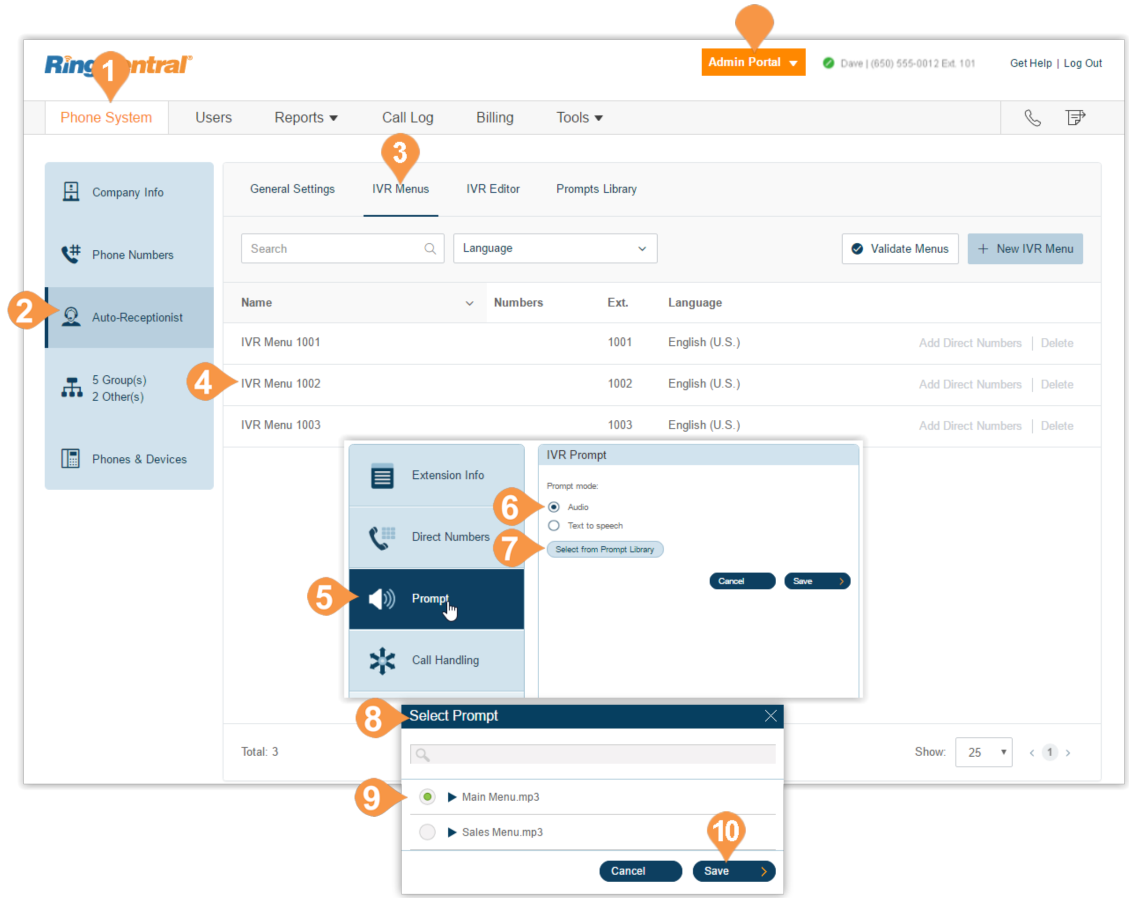
RingCentral

Select Prompt Mode: Audio

To select a previously recorded audio prompt, do the following:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Select an existing **IVR Menu.** The **Extension Info** appears.
5. Click **Prompt**. The **IVR Prompt** pop-up appears.
6. Under **Prompt mode**, select the button next to **Audio**.
7. Click **Select from Prompt Library**.
8. The **Select Prompt** pop-up appears with a list of pre-uploaded prompts.
9. Select the button next to the prompt you'd like to set.
10. Click **Save**.

You can listen to your new prompt by dialing into the extension and re-recording it until you are satisfied.

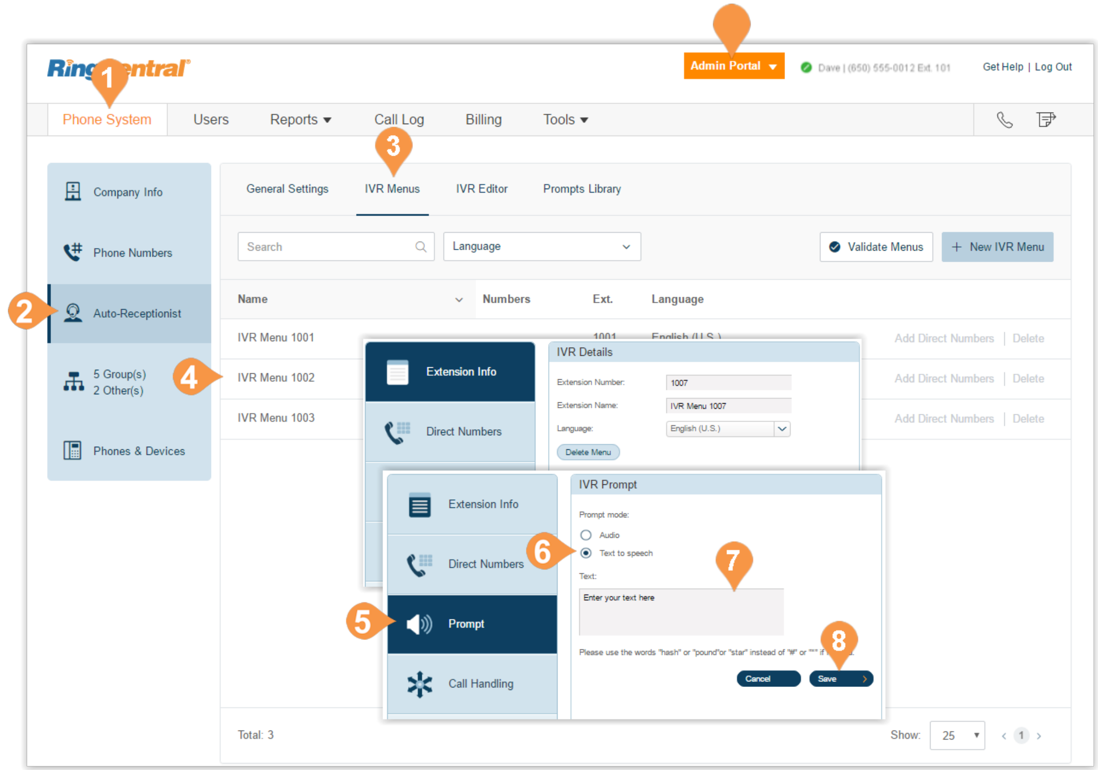


Select Prompt Mode: Text-to-Speech

RingCentral's text-to-speech utility converts the text greeting you typed into a voice file and saves it to the IVR Prompt Library. Set an IVR prompt using text-to-speech. The text you enter must contain only letters, digits, space, commas, and periods. No special symbols. Use the words “hash” or “pound” or “star” instead of “#” or “*” if needed.

To set up a text-to-speech prompt for an IVR menu:

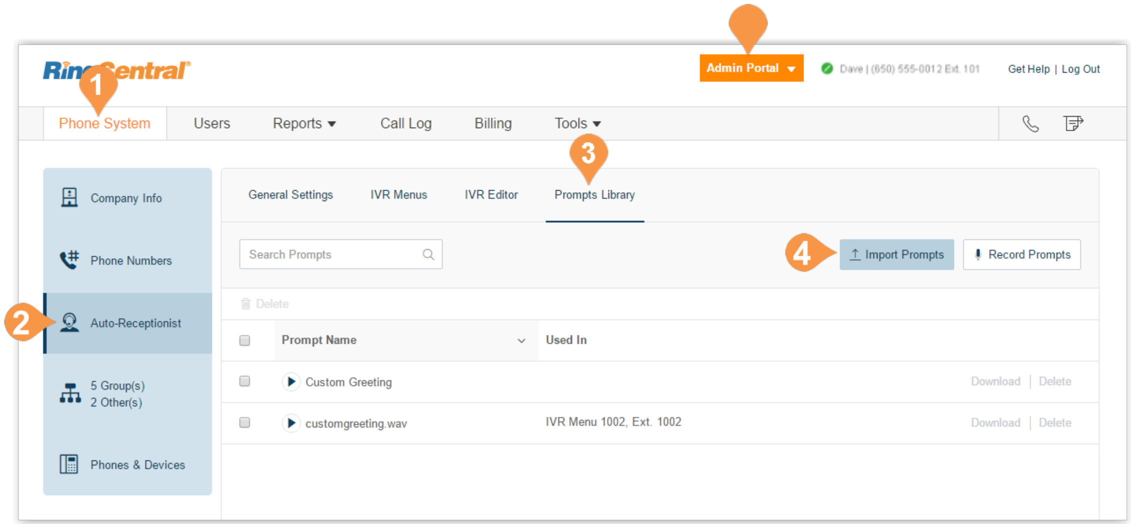
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Select an existing **IVR Menu.** The **Extension Info** appears.
5. Click **Prompt**. The IVR Prompt pop-up appears.
6. Under **Prompt mode**, select the button next to **Text to speech.**
7. In the box for **Text:** type your desired greeting and connection instructions for your callers.
8. Click **Save.**



Recording Greetings and Messages

Several tasks require admins to record messages or greetings for your RingCentral system. These steps explain how to do the following:

- Record Over the Phone
- Record Using the Computer Microphone
- Import a WAV or MP3 file.



Import a WAV file for Your IVR Prompt

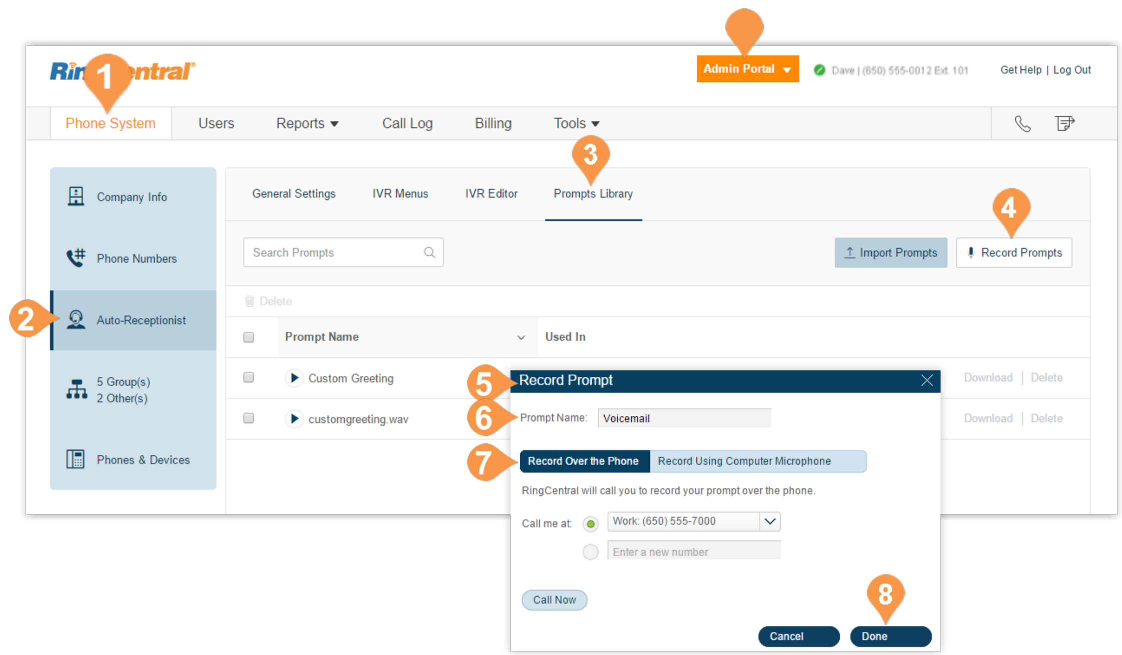
In the Prompts section, you can import or record your IVR prompts and edit prompts that have already been imported. To import a WAV file, do the following:

1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **Prompts Library** tab.
4. Click the **Import Prompts** button.
5. A browser appears.
6. Navigate to the prompt file location.
7. Select the file and click **Open**.

Record a Prompt over the Phone

Account admins and users with permissions can create a custom audio prompt. One way to create this prompt is to record the prompt using your RingCentral phone.

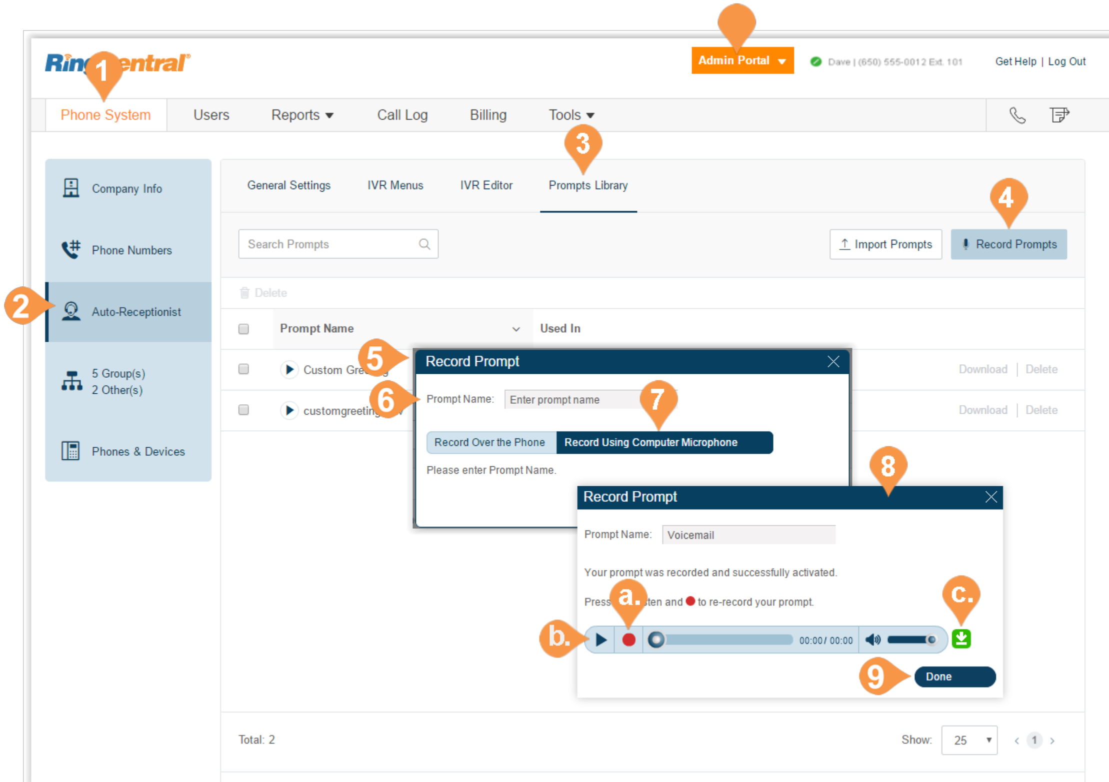
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. The **Record Prompt** pop-up appears.
6. Enter a name in the text field next to **Prompt Name**.
7. Click **Record Over the Phone**.
   - Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field.
   - Click the **Call Now** button, and RingCentral will call you to record your message. Record your IVR prompt over your phone when prompted.
8. Click **Done**.



Record a Prompt Using Your Computer Microphone

Account admins and users with permissions can create a custom audio prompt. One way to create this prompt is to record the prompt using your computer microphone.

1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. A pop-up will appear.
6. Enter a name for your prompt.
7. Click **Record Using Computer Microphone**. Click **Allow** if RingCentral asks to record through your computer.)
8. The **Record Prompt** pop-up appears.
   a. When ready, click the red **Record** button to record or re-record your IVR prompt through your computer microphone.
   b. Click the **Play** button to listen to your prompt and then click the Record button to re-record your IVR prompt.
   c. Click the **Download** button to and save your recording to your computer.
9. Click **Done**.

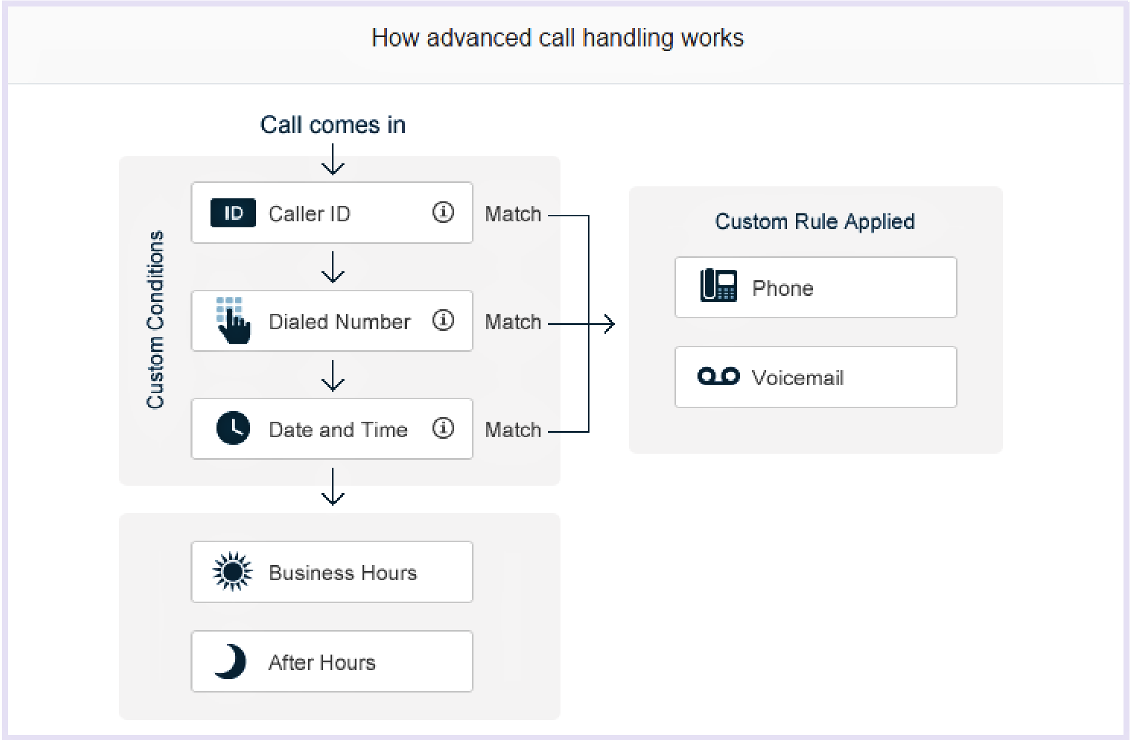


Custom Rules

Custom rules let you manage call handling enabling you to create efficient processes and streamline your work flow.

When your call enters the RingCentral system it is filtered through any conditions you have set, for example Caller ID, Dialed Number, or Date and Time. You can also apply business hours or after hours conditions to incoming calls. These conditions are passed to the destination phone or voicemail.

Once you create a custom rule, be sure to test the rule to verify it works as you expect.

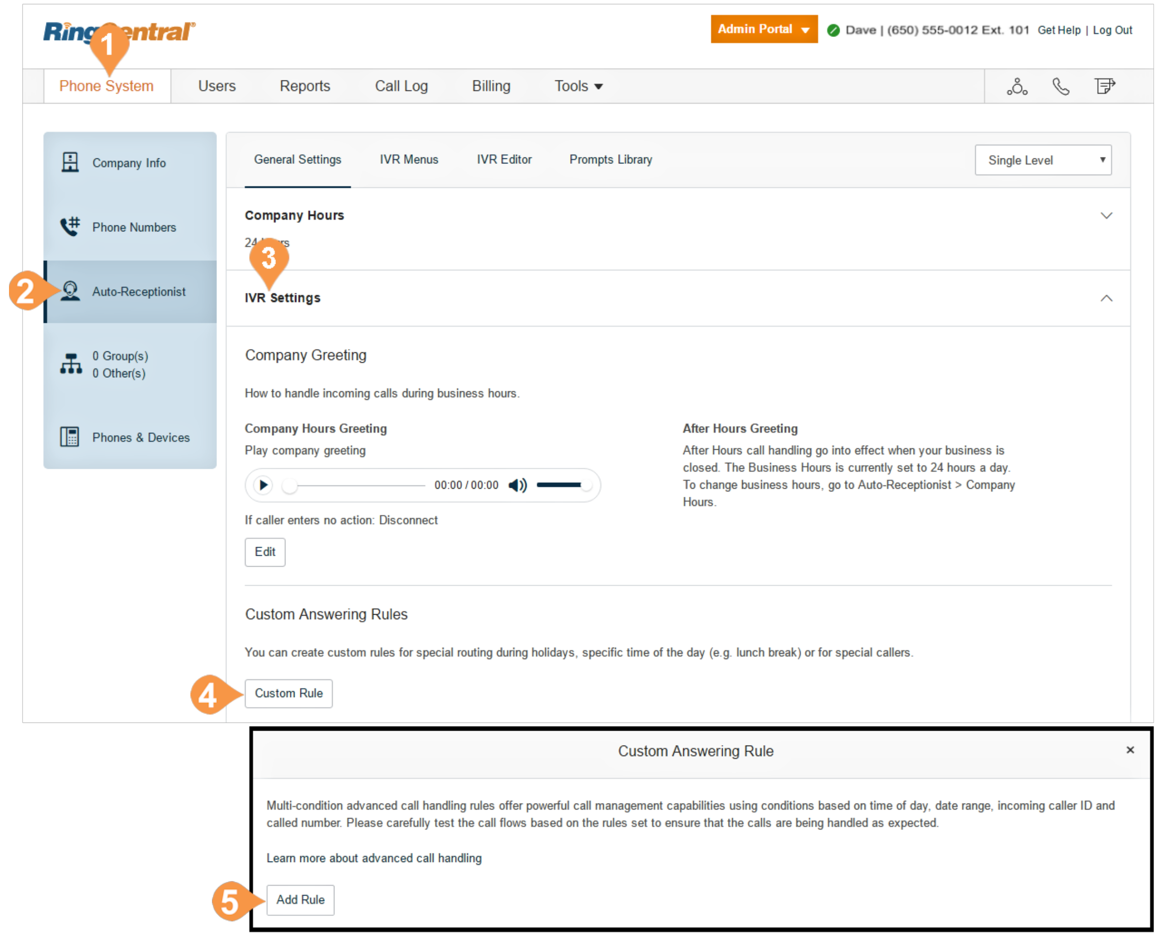


Create a Custom Rule

Additionally, any previously-created rules are listed in the pop-up that appears.

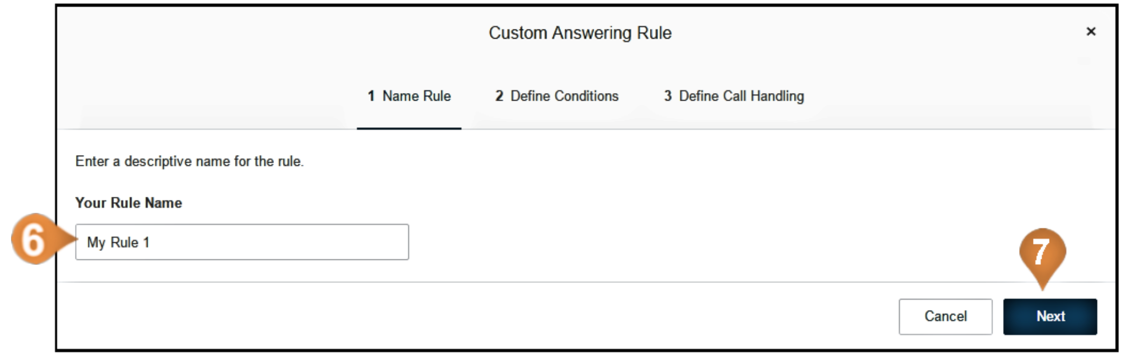
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Under the **General Settings** tab, click **IVR Settings**.
4. Under **Custom Answering Rules**, click **Custom Rule**.
5. Click **Add Rule**. The **Custom Answering Rule** pop-up appears.

Instructions continue on the following pages.



6. Enter the **Rule Name**.
7. Click **Next**.
8. Click one of the answering rule conditions:
    - CallerID
    - Called Number
    - Date and/or Time.

Instructions continue on the following pages.

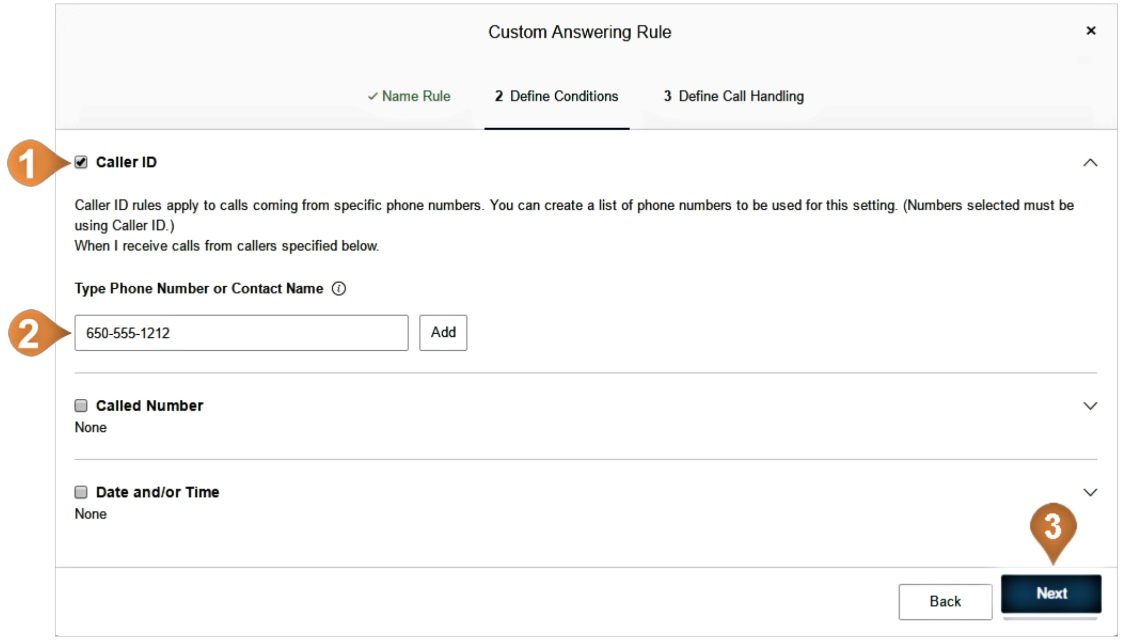


Custom Rule Condition - Caller ID

Caller ID - applies the rule according to phone numbers you specify. Be sure the specified number is caller ID enabled.

Follow the previous steps, “Custom Rules” on page 71, then:

1. Click the answering rule conditions, CallerID.
2. Enter the phone number or contact name and press **Add**.
3. Click **Next**. the **Custom Answering Rule** pop-up appears. Go to “Custom Rule Call Handling Definitions” on page 77.

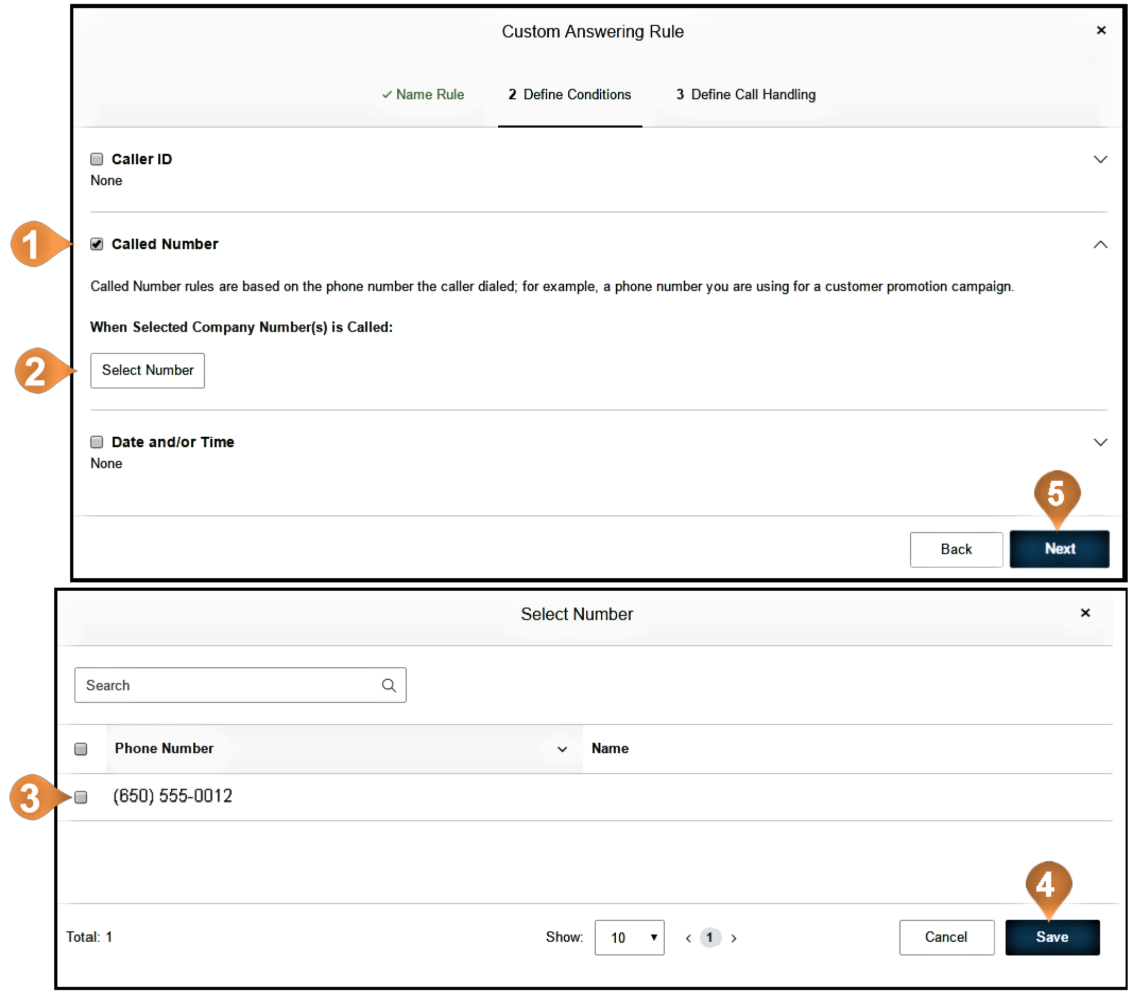


Custom Rule Condition - Called Number

Called Number applies the rule to the phone number dialed.

From the previous steps, then:

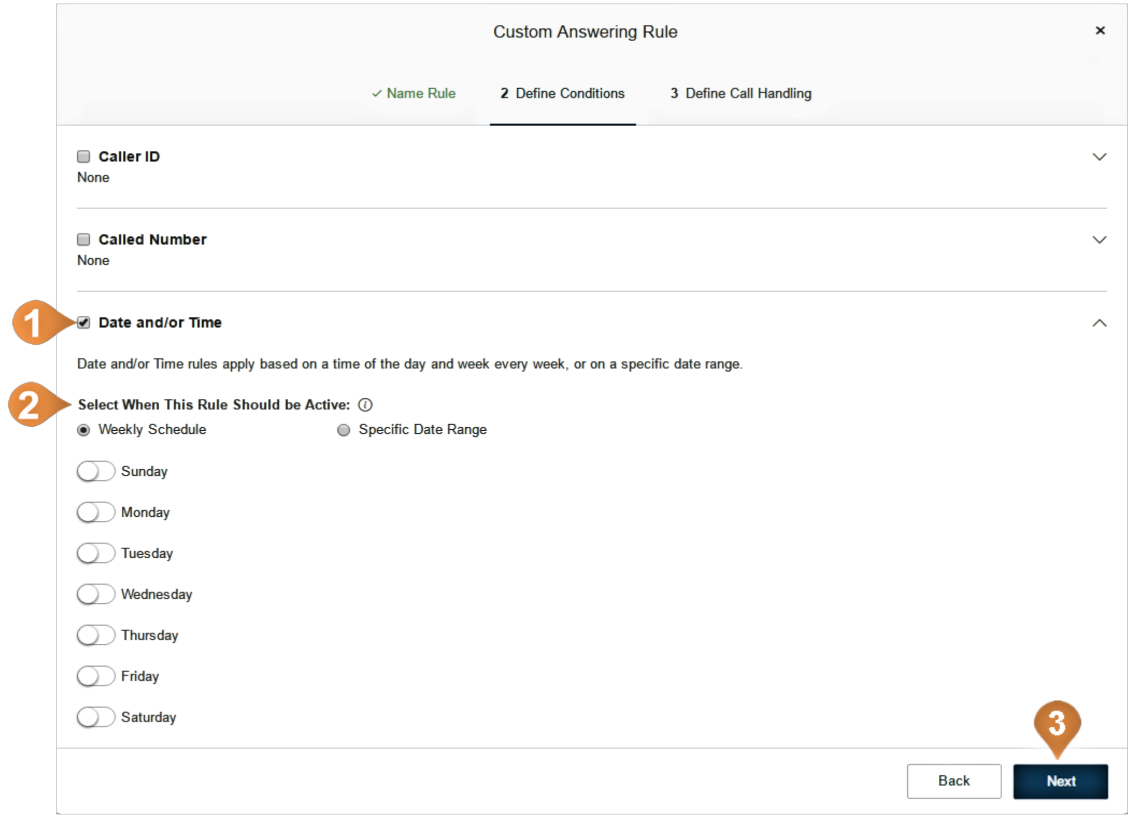
1. Click the answering rule condition, **Called Number**.
2. Click the check box **Select Number**. The **Select Number** pop-up appears.
3. Click the **Select Number** button.
4. Click **Save**.
5. Click Next. Go to “Custom Rule Call Handling Definitions” on page 77.



Custom Rule Condition - Date and/or Time

This condition applies rules based on a time of day, week, or date range.

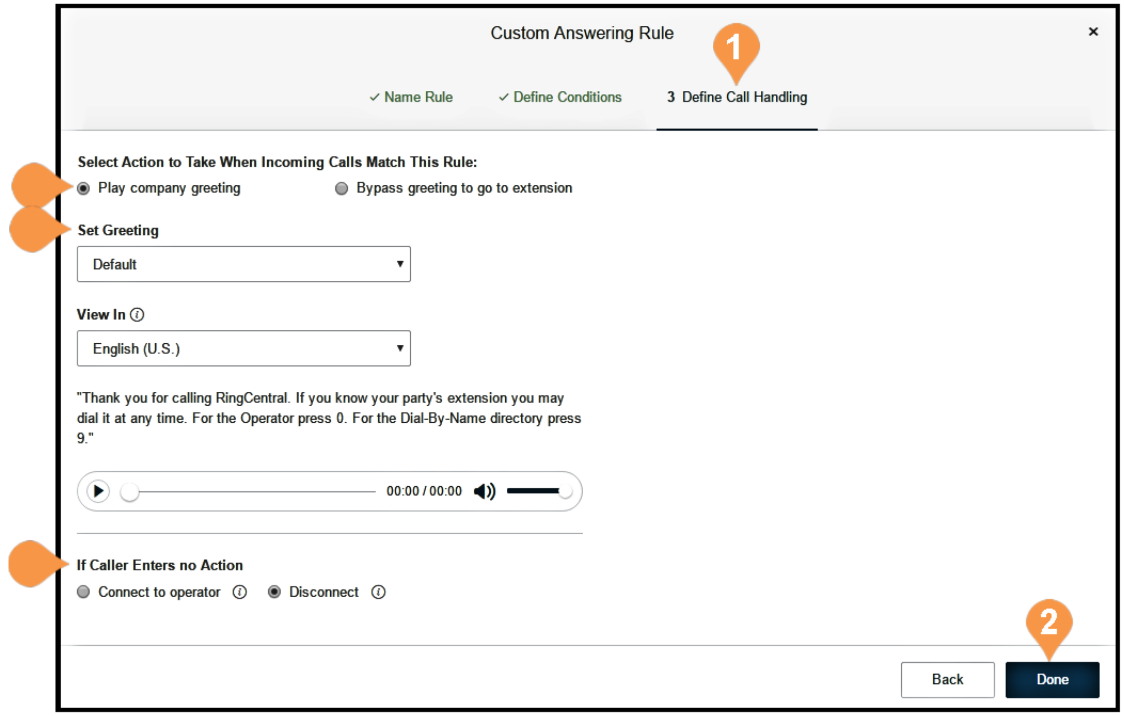
1. Click the answering rule condition, **Date and/or Time**.
2. **Select When this role Should be Active**.
3. Click **Next**. Go to “Custom Rule Call Handling Definitions” on page 77.



Custom Rule Call Handling Definitions

From setting a rule condition, now define the call handling for that rule.

1. **Select Action to Take When Incoming Calls Match This Rule**:
   - Choose to **Play Company Greeting** or **Bypass greeting to go to extension.**
   - **Set Greeting -** Choose **Default** or **Custom.** The default greeting is shown in the window. Select **Custom** to create your own.
   - **If Caller Enters no Action -** Choose whether the call is routed to the operator or disconnected if the caller does not enter an action.
2. Click **Done**.



Custom Answering Rule List

All created custom answering rules are listed when you follow these steps, as shown in “Custom Rules” on page 71:

1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Under the **General Settings** tab, click **IVR Settings**.
4. Under **Custom Answering Rules**, click **Custom Rule**.

The list opens to this display.

Add Custom Rules

To add a custom rule:

5. Click Add Rule. Follow the instructions on the previous pages.

Validate Custom Rules

To validate the list of created rules:

6. Click **Validate**.

Edit Custom Rules

To edit an already created rule, click Edit.

Call Groups

Groups Listing

RingCentral offers different types of groups for your phone system needs.

Call Queues are different from extensions. Call queues increase the efficiency of your company by directing the calls to the right employees. Call queues can support up to 25 calls waiting in a call queue. Queue overflow can be enabled to extend your call queue. To learn more about Call Queues, see "Call Queue Group" on page 81.

Paging Only* groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices. To learn more about Paging Only groups, see "Paging Only Group" on page 92.

Shared Lines* allow calls made to one phone number to be answered by multiple phones. Answered calls can easily be handed off to other phones sharing the same phone number. To learn more about Shared Lines groups, see "Shared Lines Group" on page 95.

Park Locations are private locations for your employees to park and pick up calls. Create up to 100 park locations for different groups of users in your phone system. To learn more about Park Locations, see "Park Location Group" on page 108.

Call Monitoring** allows you to set permissions that allow specific users to monitor the calls of other users. To learn more about Call Monitoring, see "Call Monitoring Group" on page 112.

Other - Message-Only Extensions allow you to create a dedicated extension specifically for receiving voice messages. All calls routed to this extension automatically directed to the extension's voicemail box. To learn more about Message-Only Extension groups, see "Message-Only Extension" on page 115.

Other - Announcements-Only Extensions allow you to create a dedicated extension specifically for playing an announcement. All callers routed to this extension will only hear a recorded announcement/greeting. To learn more about Announcement-Only Extension groups, see "Announcements-Only Extension" on page 123.

Other - Limited Extensions allow you to create an extension installed in a common area (meeting rooms or in hotel rooms) for anyone who has the need to access basic inbound/outbound calling capabilities. To learn more about Limited Extension groups, see .

*Not available for one-line accounts.
**Available for Office Premium and Ultimate users only.

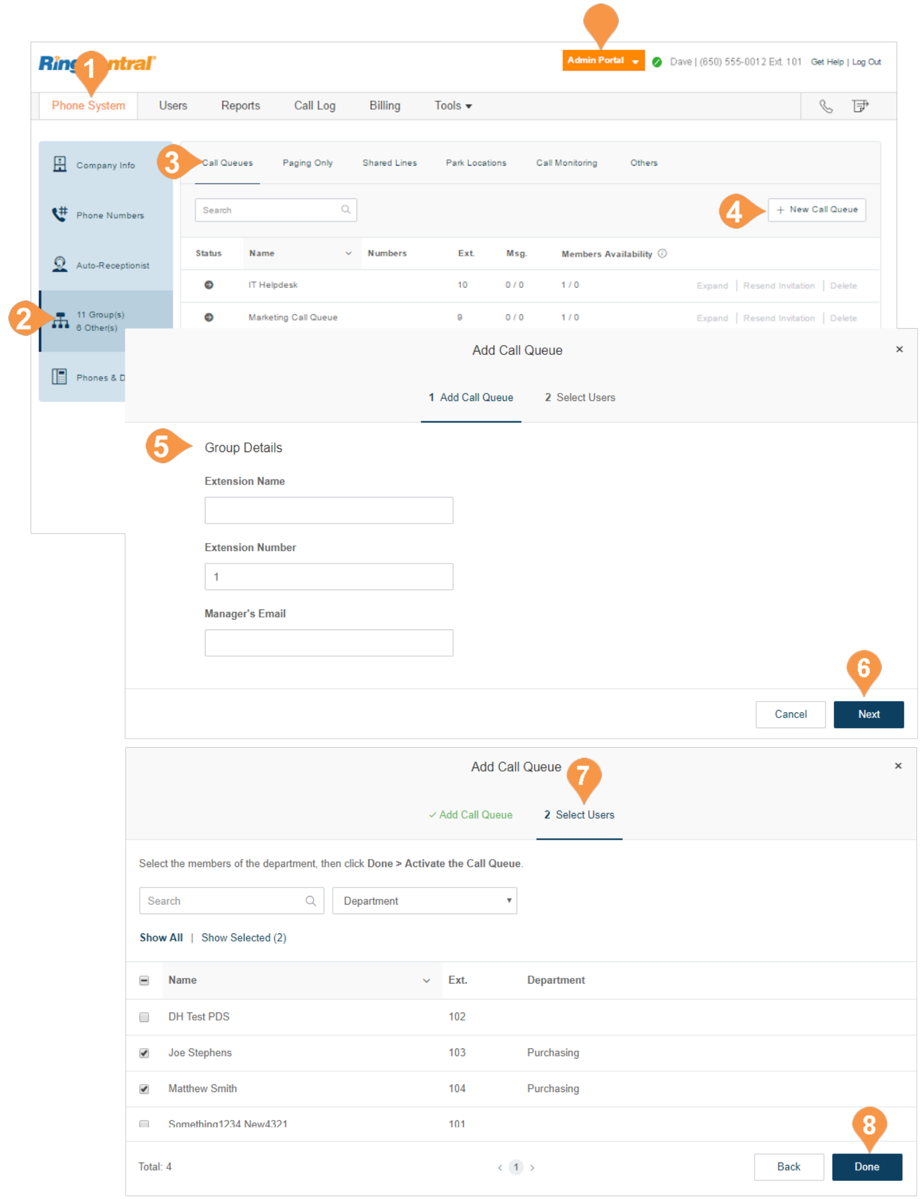
Call Queue Group

Call Queues

Create a call queue when you want a specific group of users (such as Sales, Support, or Billing) to share incoming calls. Each call queue can have an extension or direct (local or toll-free) number of its own. You can define specific business hours for each call queue and set up email or text message notifications of any missed calls or voice mails.

Add a Call Queue Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Click the **New Call Queue** button.
5. In **Add Call Queue**, enter an **Extension Number**, **Extension Name**, and **Manager Email**.
6. Click **Next**.
7. Select the users you'd like to add to the group from the **Call Queue Members** list.
8. Click **Done**.

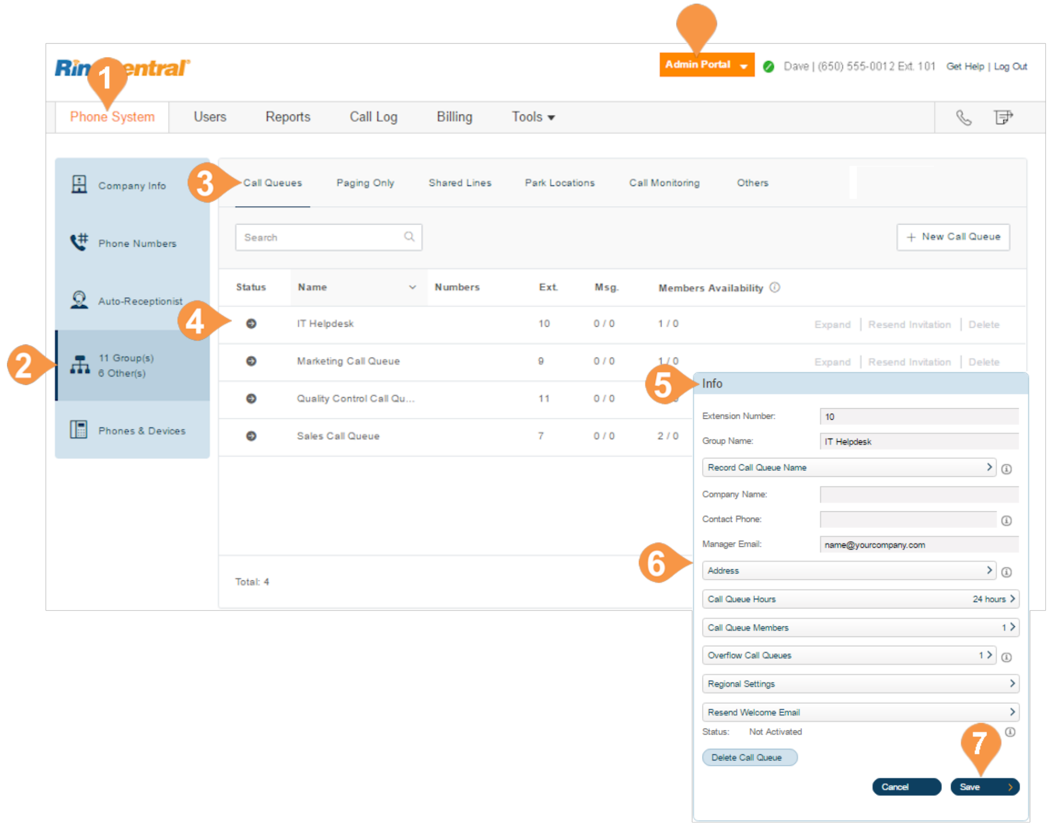


Configure a Call Queue

After you have created a Call Queue, you can configure the Call Queue Info, Direct Numbers, Greeting, Call Handling, and Messages & Notifications.

Call Queue Info

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups.**
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue.**
5. The **Info** pop-up appears. If you don't have any existing call queues, go to the previous page to learn how to create one.
6. Edit your settings:
    a. **Extension Number**
    b. **Group Name**
    c. **Record Call Queue Name**
    d. **Company Name**
    e. **Contact Phone**
    f. **Manager Email**
    g. **Address**
    h. **Call Queue Hours**
    i. **Call Queue Members**
    j. **Overflow Call Queues**
    k. **Regional Settings**
    l. **Resend Welcome Email**
    m. **Delete Call Queue**
7. Click **Save.**

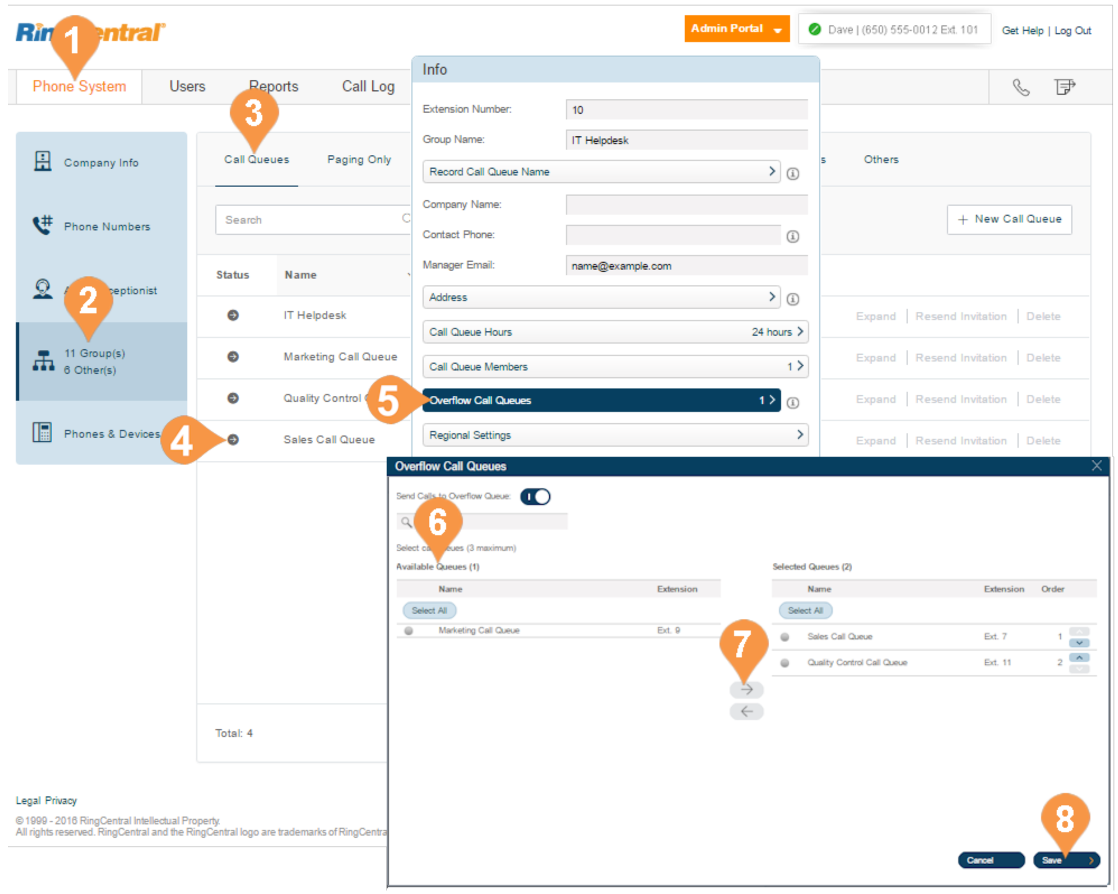


Configure Call Queue-to-Queue Overflow

Call queue-to-queue overflow allows scalable management of inbound calls during heavier-than-usual or peak-season inbound call activity. You can append existing queues to the original queue, so if all lines are busy in the original queue, calls overflow to additional queues.

Call handling follows the call queue policy. Call queue overflow is supported for the *Rotating* and *In Fixed Order* sequence protocols. The *Simultaneous* protocol is not supported.

The **Overflow Call Queues** section lets you enable, create, and manage your overflow queues.

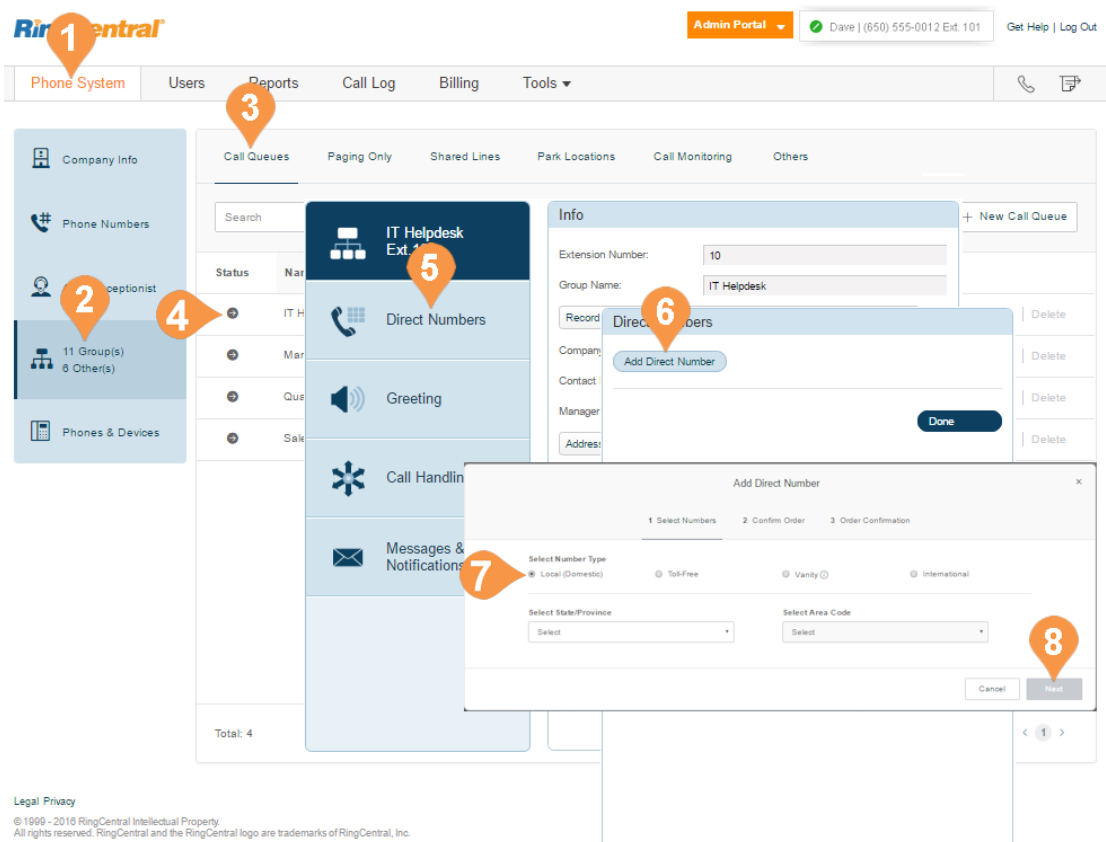


Overflow Call Queues

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing call queue group. The call queue group must be configured with either a *Rotating* or *In Fixed Order* call handling protocol. See “Incoming Call Handling” on page 87.
5. Click **Overflow Call Queues**.
6. The **Overflow Call Queues** pop-up appears. Select a maximum of three groups from the **Available Queues** list.
7. Use the arrow buttons to move them to the **Selected Queues** list.
8. Click **Save.** On first use, an Alert pop-up appears. Select whether to **Keep disabled and save** or **Enable and save** the selected overflow queue.

The number of enabled overflow call queues are shown in the Info pop-up.

Add a Direct Number



1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue**.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Click the button next to one of these types of number:
   a. **Local**: Select this button for **Local** number. Provide the State/Province and Area Code and Select Number.
   b. **Toll-Free**: Select the button for **Toll-Free** number. Select a Toll-Free prefix and a number from the Available Numbers list.
   c. **Vanity**: Select this button for **Vanity** number. Choose a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available.
   d. **International**: Select this button to add an **International** number, then select **Geographic Number** or **Toll-Free Number** and Country. Follow the prompts to complete your order.
8. Click **Next** when finished choosing your number.

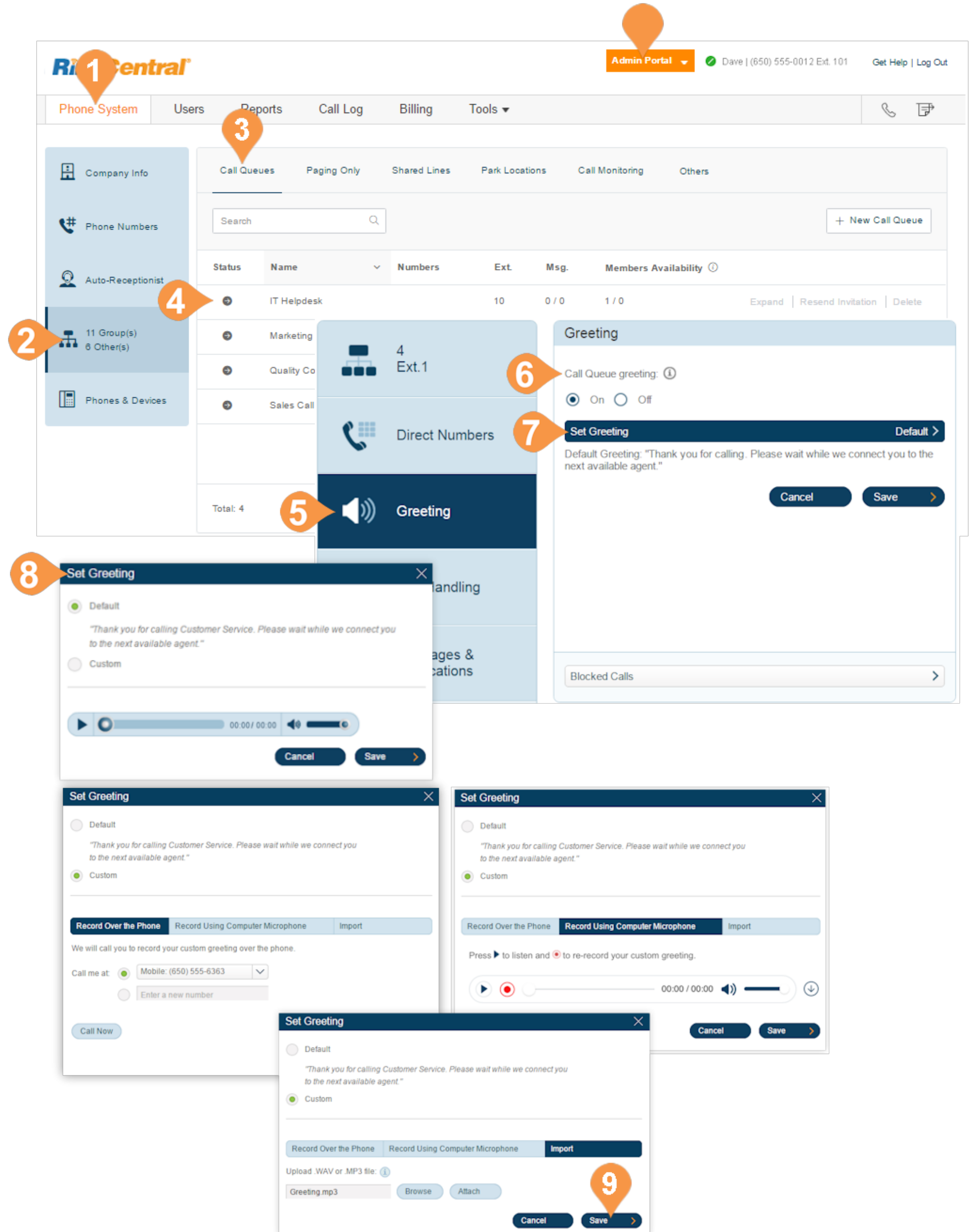
Call Queue Greetings

If you would like your callers to hear a recorded greeting before being connected to a call group, turn on the Call Queue greeting.

Note: If you have set custom call queue hours, follow these steps for both the Call Queue Hours and After Hours tabs.

Set a Call Queue Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue**.
5. Click **Greeting**.
6. Select the button next to **On**.
7. Click **Set Greeting**.
8. A pop-up window will appear displaying the current Greeting. Choose your preferred type of greeting:
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button and RingCentral will call you to record your message.
      - **Record Using Computer Microphone.**
        Click **Allow** if RingCentral asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your greeting through your computer microphone. Stop the recording and listen to the playback.
      - **Import Browse for a WAV or MP3** file you want to use. Click **Attach.**
9. Click **Save**.

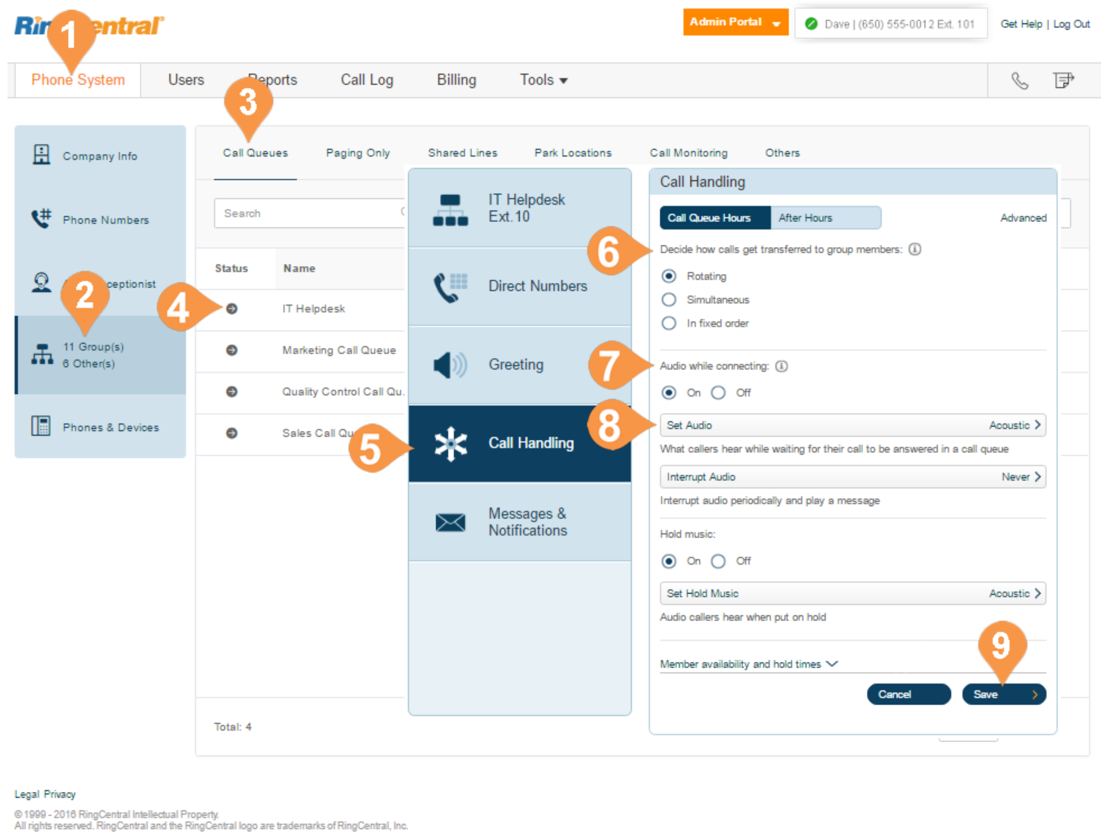


Incoming Call Handling

Choose how you'd like each call queue to handle incoming calls. Set the order in which the calls will be transferred to the members of the call queue, and choose the audio while connecting, hold music, and hold time. .

1. From the Admin Portal, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Click the name of the **Call Queue** you'd like to configure.
5. Select **Call Handling** to edit your call handling settings.
6. Select the order in which calls are transferred to department members:
   a. **Rotating**: in order by extension number
   b. **Simultaneous**: on all department extensions
   c. **In fixed order**: select **Specify Fixed Order**.
7. To enable **Audio while connecting** select the **On** button.
8. To set what callers hear during business hours while waiting for a connection, select **Set Audio**. (see Note)
   a. **Ring Tones**
   a. **Music:** choose from a preloaded selection of music.
   a. **None**
   a. **Custom:** upload a WAV or MP3 file.
9. Click **Save**

Note: If you have set custom call queue hours, follow these steps for both the Call Queue Hours and After Hours tabs.



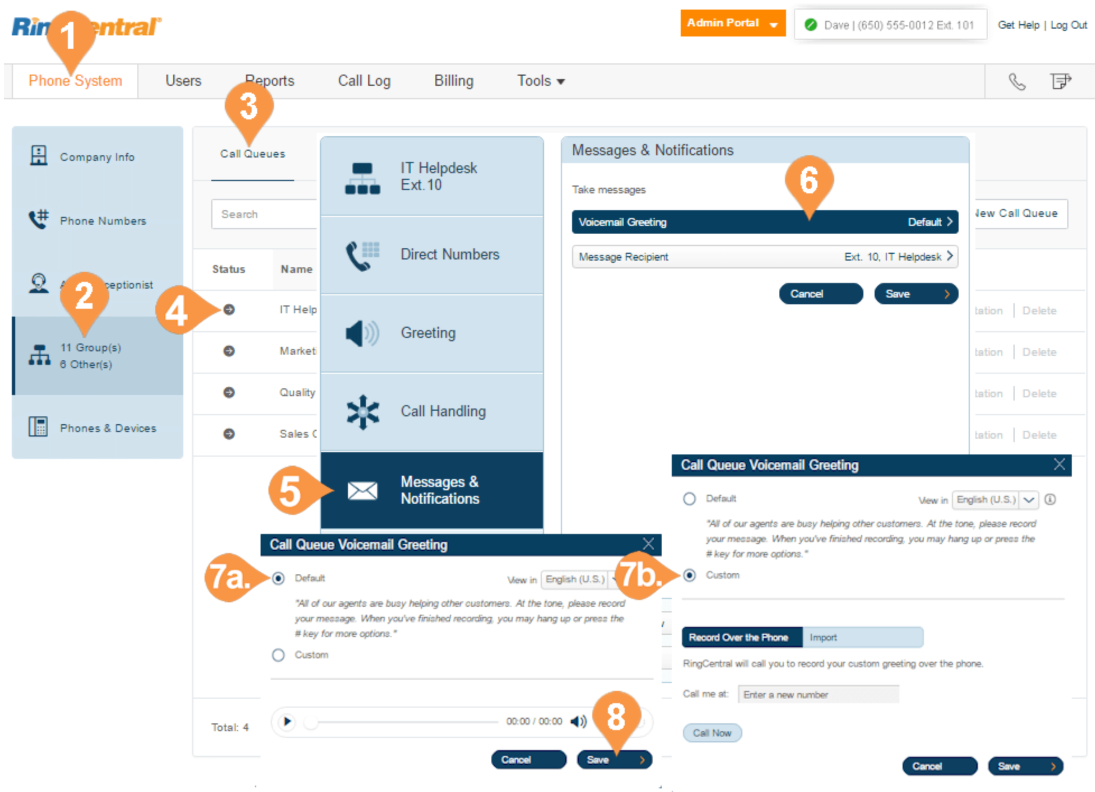
Messages and Notifications

In this section, set your message recipient, voicemail greeting, and notifications. RingCentral allows each Call Queue a separate voicemail message to greet unanswered calls, as well as allowing you to set a recipient for these voicemails.

Set a Voicemail Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select a **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Voicemail Greeting**.
7. A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
   a. **Default**: Select the button next to **Default**.
   b. **Custom**: Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and RingCentral will call you to record your message.
      - **Import**
        Browse for a WAV or MP3 file you want to use. Click **Attach**.
8. Click **Save**.

Note: If you have set custom call queue hours, follow these steps for both the Call Queue Hours and After Hours tabs.

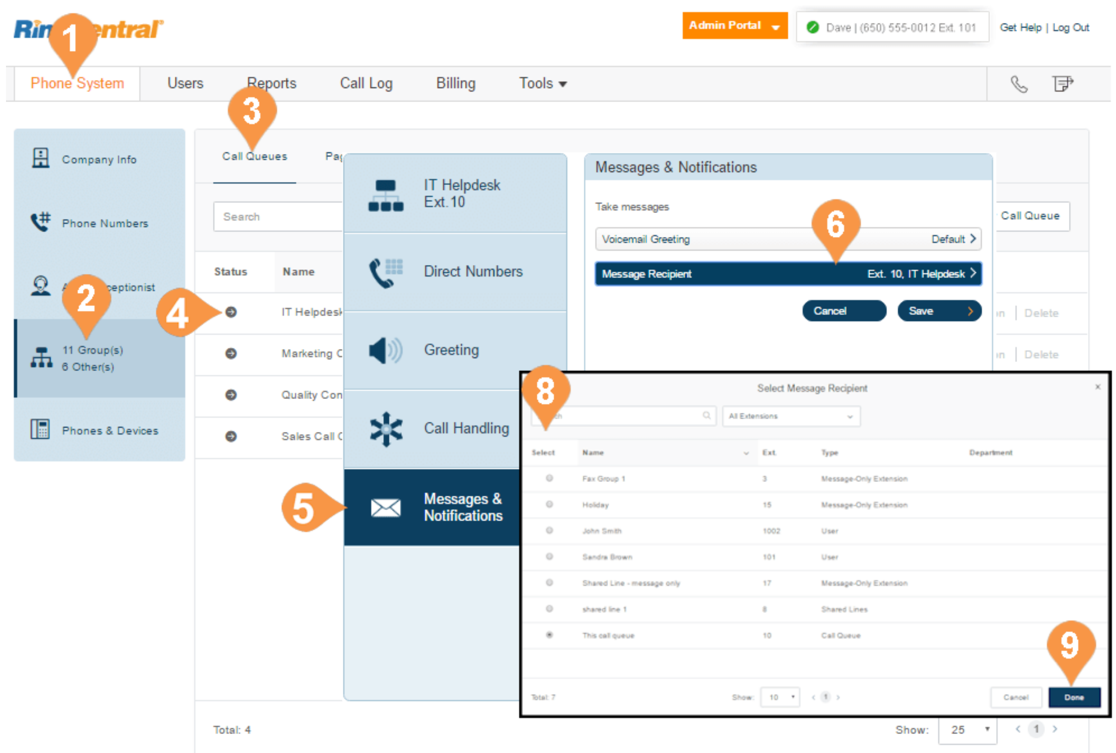


Message Recipient

After you have set your Voicemail Greeting, you can set which users or call queues to receive messages.

Set the Message Recipient

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select a **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Message Recipient**.
7. A pop-up will appear with a list of members to receive messages left for this call queue.
8. Select the button next to the recipient.
9. Click **Done**, then click **Save**.

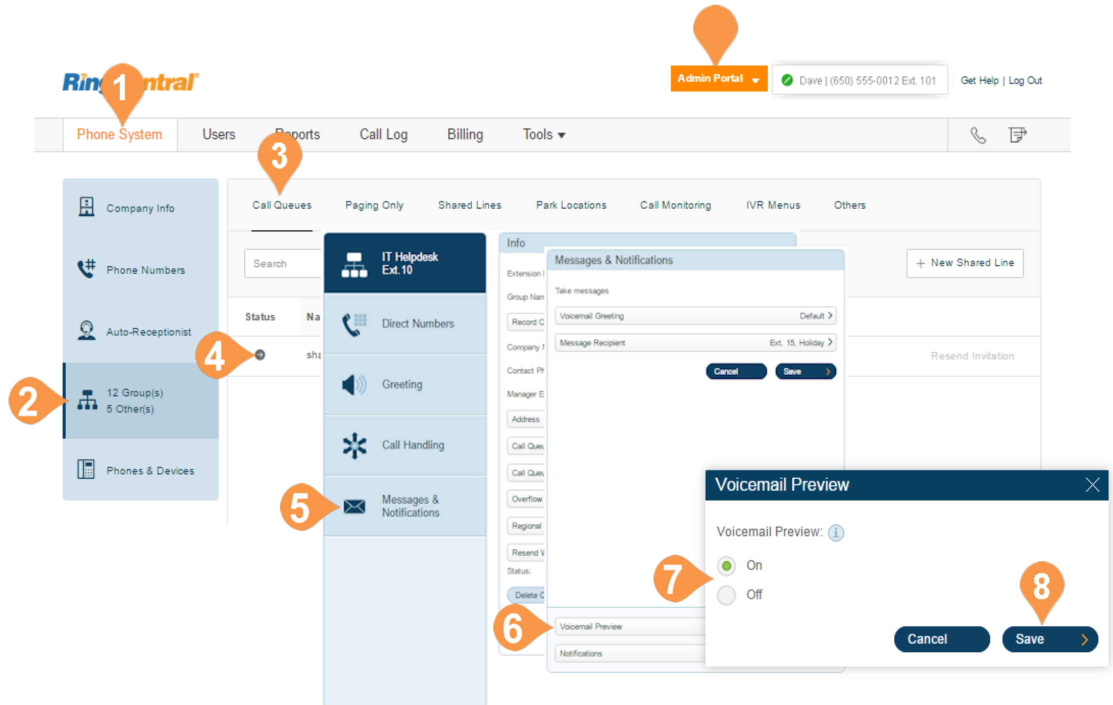


Voicemail Preview*

The voicemail preview provides a voicemail text with the essential point of the message. It delivers a text version to your RingCentral mobile or desktop application or via e-mail.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Voicemail Preview**. The **Voicemail Preview** pop-up appears.
7. Select the **On** or **Off** button to activate or deactivate **Voicemail Preview**.
8. Click **Save**.

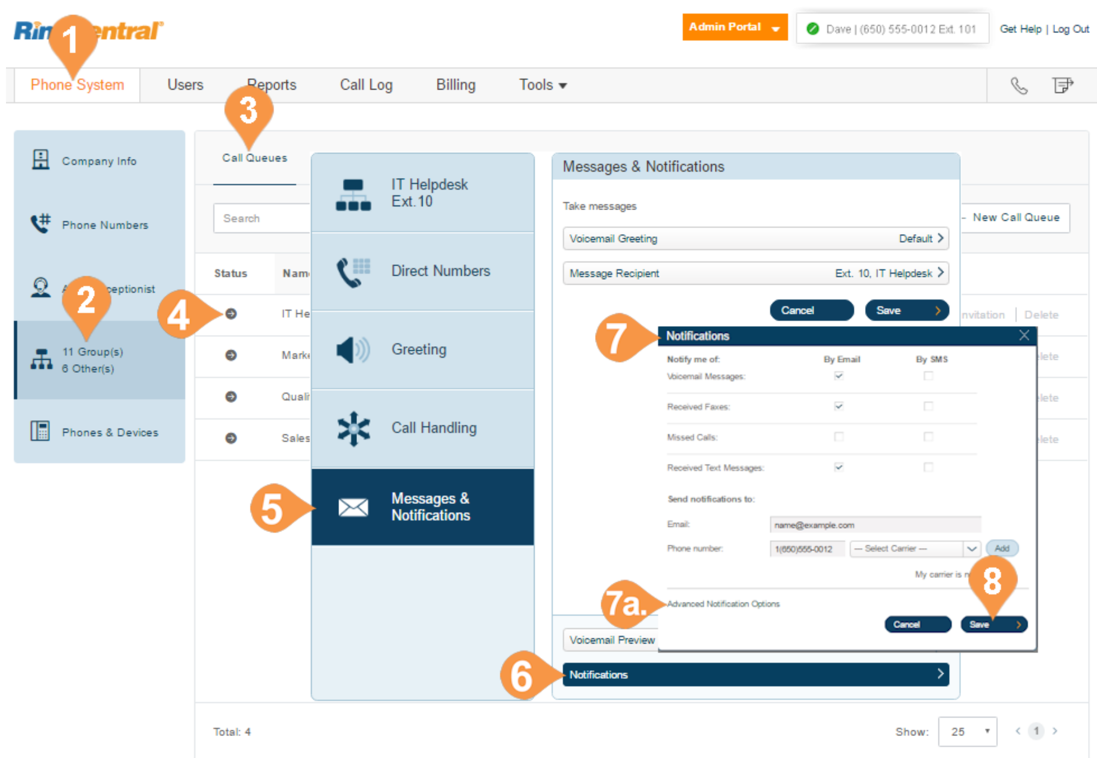
*Available for Ultimate users only.



Notifications

As an administrator, you can set up notifications to be sent to your phone or email when voicemails, faxes, missed calls, and text messages are received for each call queue. .

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select a **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Notifications**.
7. A pop-up will appear with options for email or text-message notifications to a recipient of your choice when voicemail messages or faxes are received, or calls missed. Set your notification settings by checking the boxes and filling in email and phone numbers.
   a. Click **Advanced Notification Options** to see more detailed notification settings.
   b. Set your **Advanced Notification Options**. Here you can choose different email addresses and phone numbers for your notifications, select settings for marking messages as read, and select options for email attachments.
   c. Click **Save**.
   d. Click **Switch to Basic Notification Settings** to return to the **Notifications** pop-up.
8. Click **Save**



Paging Only Group

Paging Only*

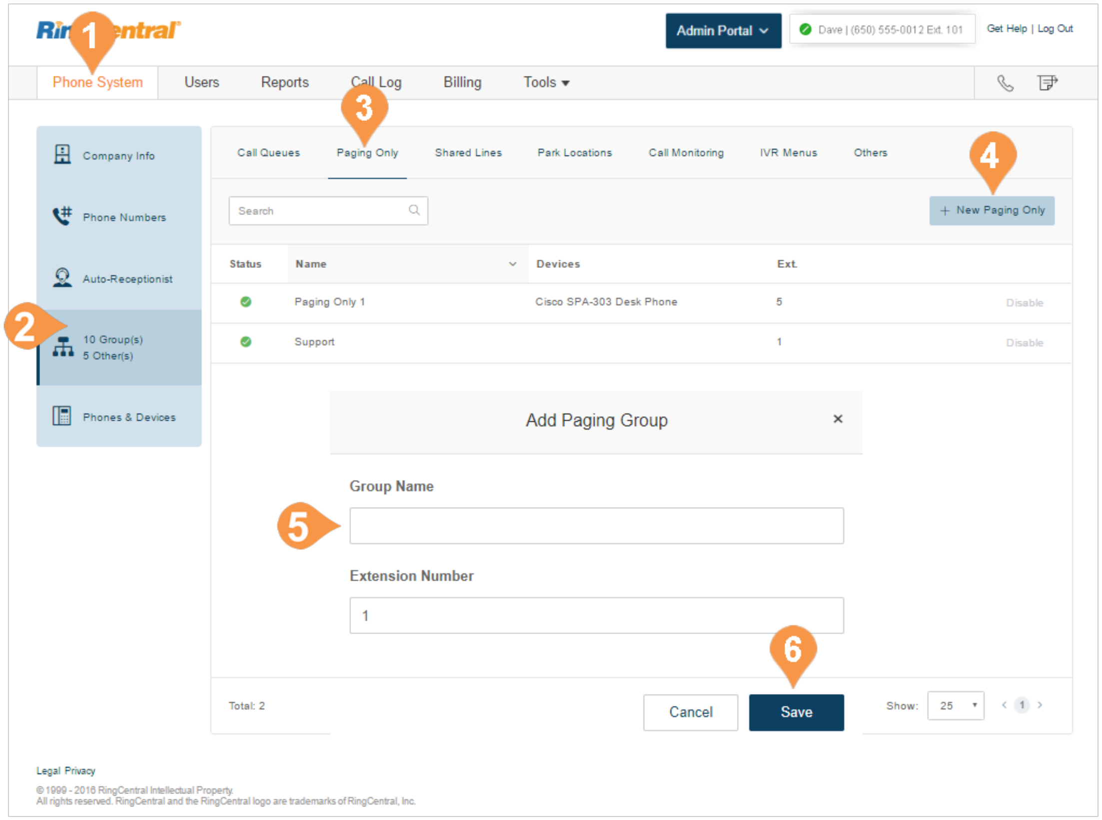
Paging Only groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices. Paging Only groups are great for a variety of locations such as warehouse/shipping centers, retail stores, schools and hospitals, among others.

You can page using a special phone with a paging soft-key, or by dialing *84 from your digital desk phone or from your VoIP calling-enabled mobile phone. In each case you need to set up the Group number, or the number representing a group of extensions receiving a paged message, prior to the page. .

Add a Paging Only Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select the **Paging Only** tab.
4. Select **New Paging Only** button in the upper right.
5. Enter the **Group Name** and **Extension Number**.
6. Click **Save**.

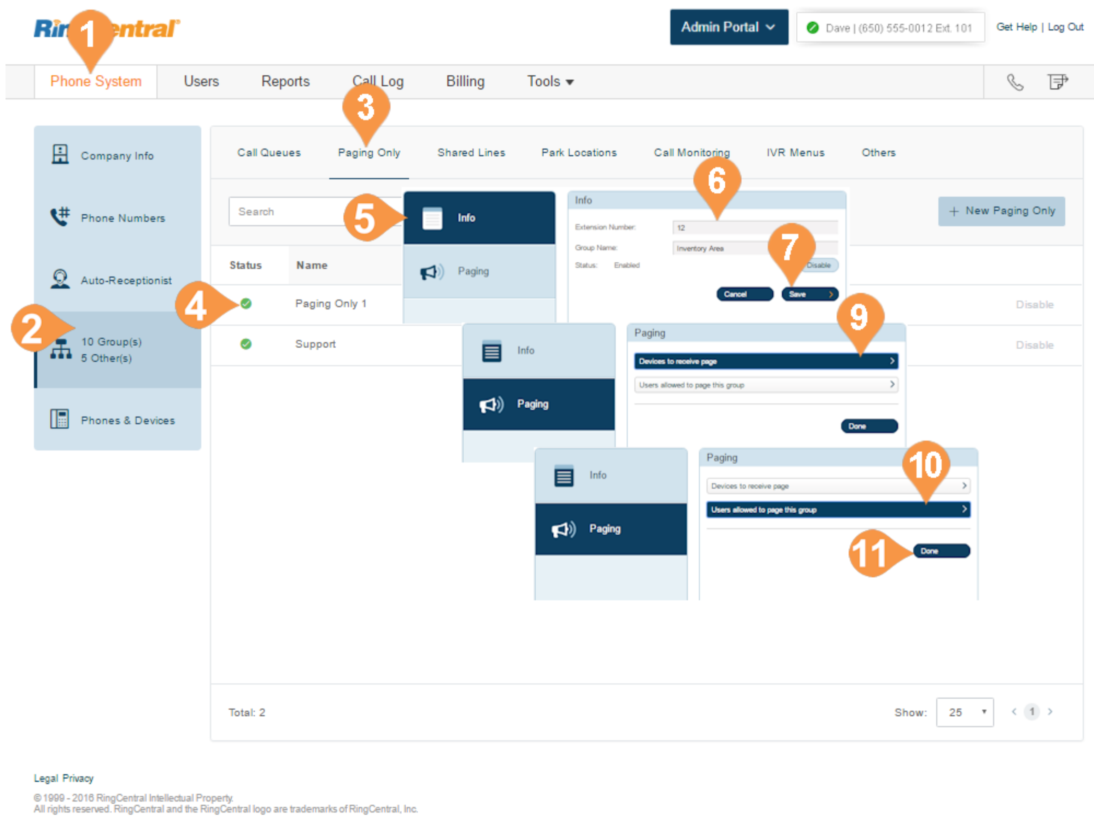
*This feature is available for accounts with two or more users



Configure a Paging Only Group .

After you set up a paging group, select the devices to receive pages from the list of paging devices and user phones capable of doing so. See also, “Add a Paging Only Group” on page 93.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select the **Paging Only** tab.
4. Select a **Paging Only** group.
5. The **Info** pop-up appears.
6. In the **Info** pop-up,
   a. Edit your extension number, group name, or disable the extension.
7. Click **Save**.
8. Click **Paging**.
9. Click **Devices to receive page**.
   a. Select the **User Phones** or **Paging Devices** to receive pages.
   b. Use the arrows to move phones or devices allowing access to receive pages from **Available Devices** to **Selected Devices**.
   c. Click **Save**.
10. Click **Users allowed to page this group**.
    a. Select the users who are to be allowed to page.
    b. Use the arrows to move users from the **Available Users** to **Allowed Users** list. This allows or revokes access to page.
    c. Click **Save**.
11. Click **Done**



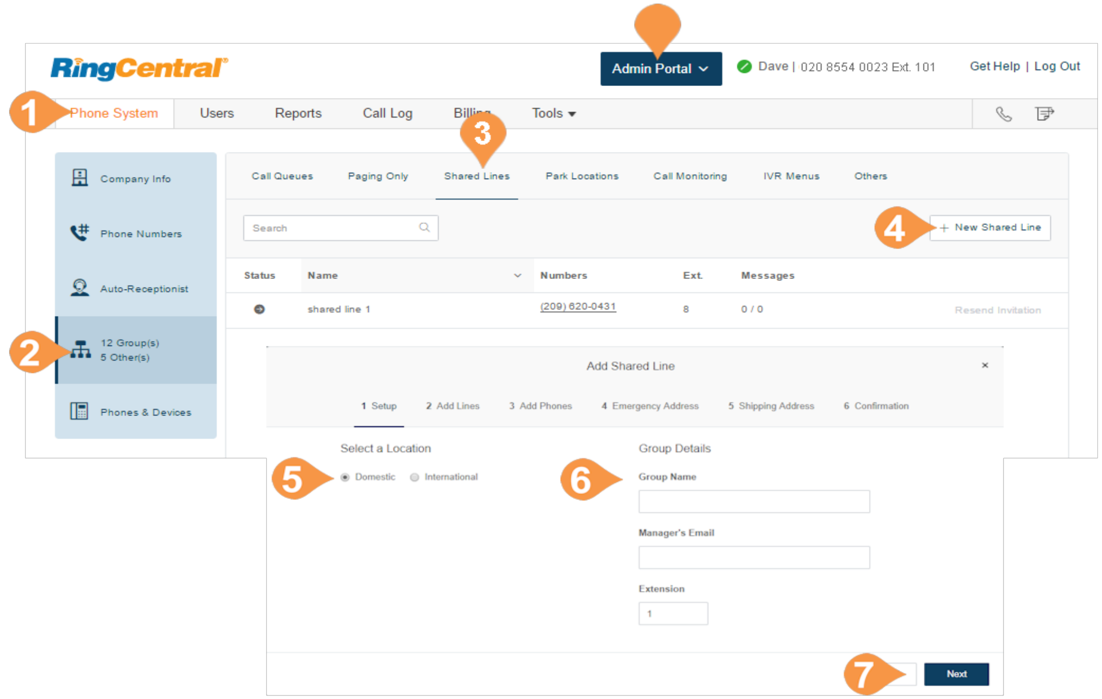
Shared Lines Group

Shared Lines*

The Shared Lines feature allows calls made to one phone number to be answered by up to 16 phones as a designated group. Multiple groups of shared lines can be set up. Answered calls can easily be handed off to other phones sharing the same phone number.

Add a Shared Lines Group

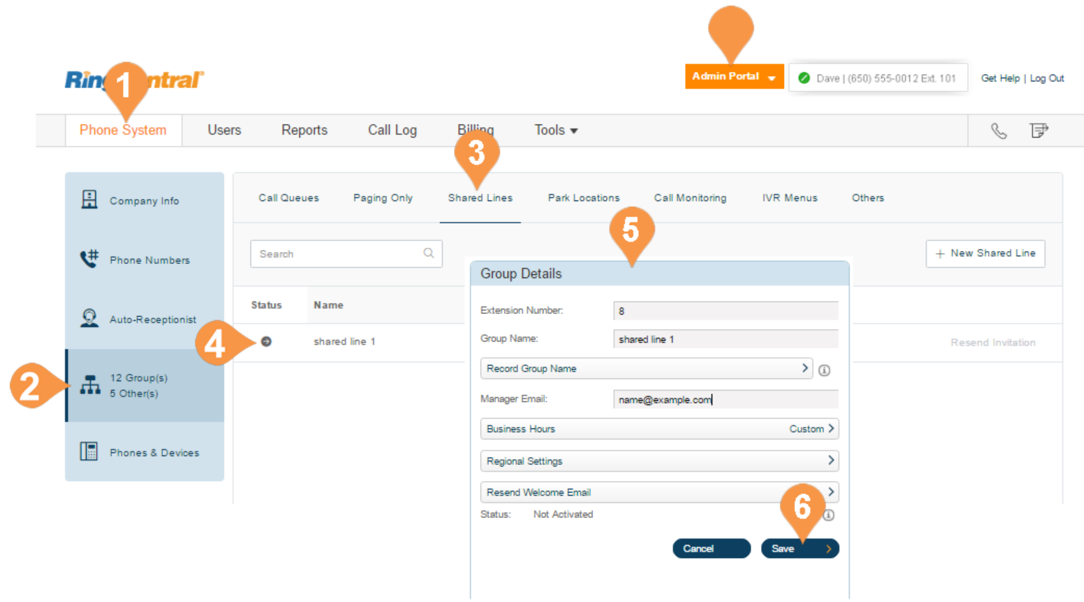
1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Click **New Shared Line**.
   The **Add Shared Line** pop-up appears.
5. Select a location: **Domestic** or **International**.
6. Enter the **Group Name**, **Manager's Email**, and **Extension**.
7. Click **Next**.
   The **Add Shared Line** pop-up appears.
8. Follow the prompts to add phone lines, order of phone number and devices.
9. Click **Save**.



Configure a Shared Lines Group

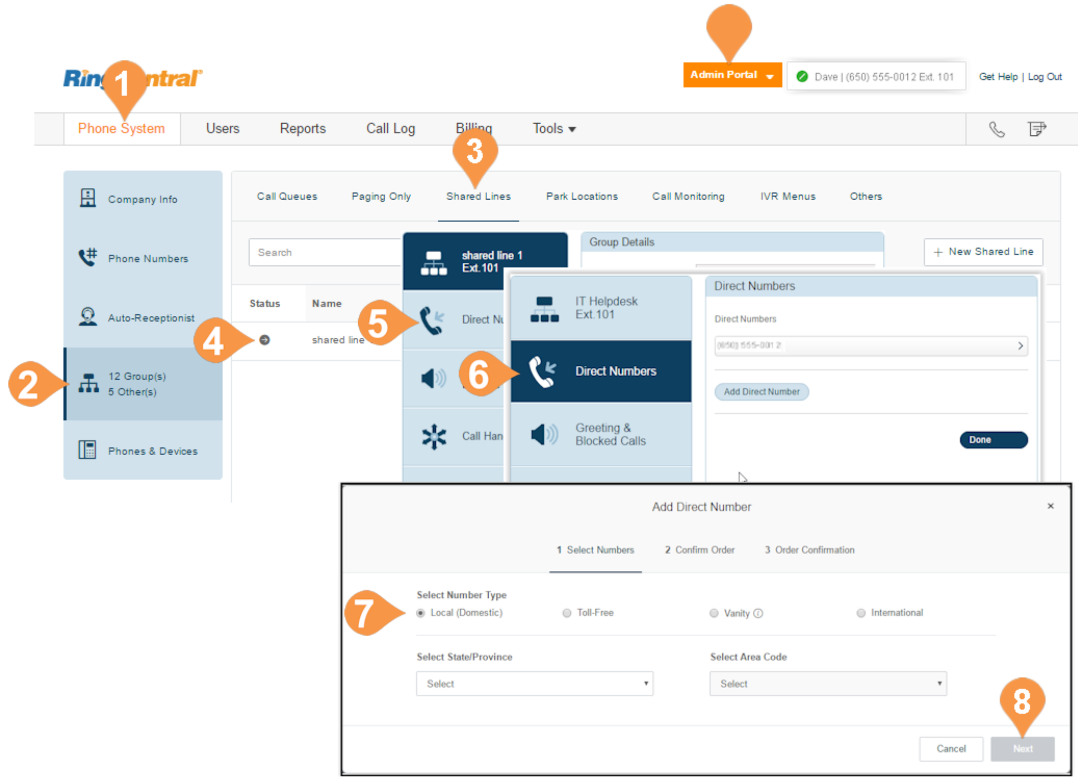
Configure the Shared Lines group's name, password, business hours, and regional settings. You can also apply a template to the group. Edit your extension number, name, or delete your menu.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select a Shared Line from the list. See page 96 for instructions on how to create a Shared Line.
5. Edit the **Group Details** information:
   a. **Extension Number**
   b. **Group Name**
   c. **Record Group Name** Select Record Group Name and choose from the text-to-speech name or you can record your group name.
   d. **RingCentral text-to-speech name**: Select the button next to **Default** to use the provided text-to-speech name.
      - **Record Group Name.** You can either **Record Over the Phone**, **Record Using a Computer Microphone**, or **Import** a (WAV) file. Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or enter a phone number in the text field. Click the **Call Now** button and RingCentral will call you to record your message.
      - **Import** Browse for a WAV or MP3 file. Click **Attach**.
   e. **Manager Email**
   f. **Business Hours**
   g. Regional Settings
   h. Resend Welcome Email
   i. Status (read only, shows information about the extension)
6. Click **Save**.



Add a Direct Number

A direct number is a phone number that can be called without going through the auto-receptionist.



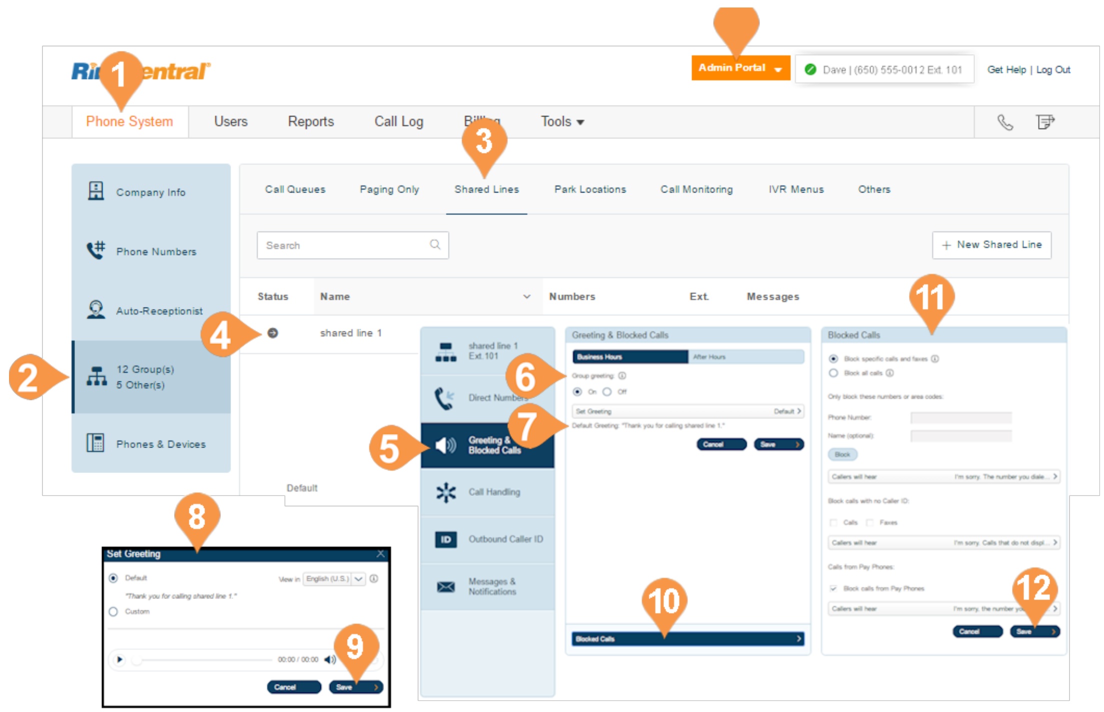
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Follow these instructions to select the type of number:
   a. **Local**: Select the button next to **Local (Domestic)**. Provide the State/Province and Area Code and Select Number.
   b. **Toll-Free Number**: Select the button for **Toll-Free Number**. Select a Toll-Free prefix and a number from the drop-down menu.
   c. **Vanity Number**: Select the button for **Vanity Number**. Choose a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available.
   d. **International Number**: Select the button next to **International**, then **Geographic Number** or **Toll-Free Number**. Select the **Country** and **Geographic Prefix**. Call the phone number listed to order an international number.
8. Click **Next** after choosing your number. Follow the prompts to purchase your new number.

RingCentral

Greeting and Blocked Calls

Set Greeting and keep the default, or record a custom group greeting. Click Blocked Calls to block specific calls or all calls for this call group. Then, set up the message blocked callers will hear.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Greeting & Blocked Calls**.
6. Under Group greeting, be sure the button next to **On** is selected if you'd like a greeting.
7. Click **Set Greeting** to set your greeting.
8. A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
   a. **Default**: To use the provided greeting, click **Default**.
   b. **Custom**: Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to Call me at, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and RingCentral will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if RingCentral asks to record through your computer. The Microphone Test and Record settings appear. When ready, click the red **Record** button to record your greeting through your computer microphone. Stop the recording and listen to the playback.
      - **Import**
        Browse for a WAV or MP3 file you want to use. Click **Attach**.
9. Click **Save**.
10. Click **Blocked Calls**.
11. Set your preferences for **Blocked Calls**.
12. Click **Save**.



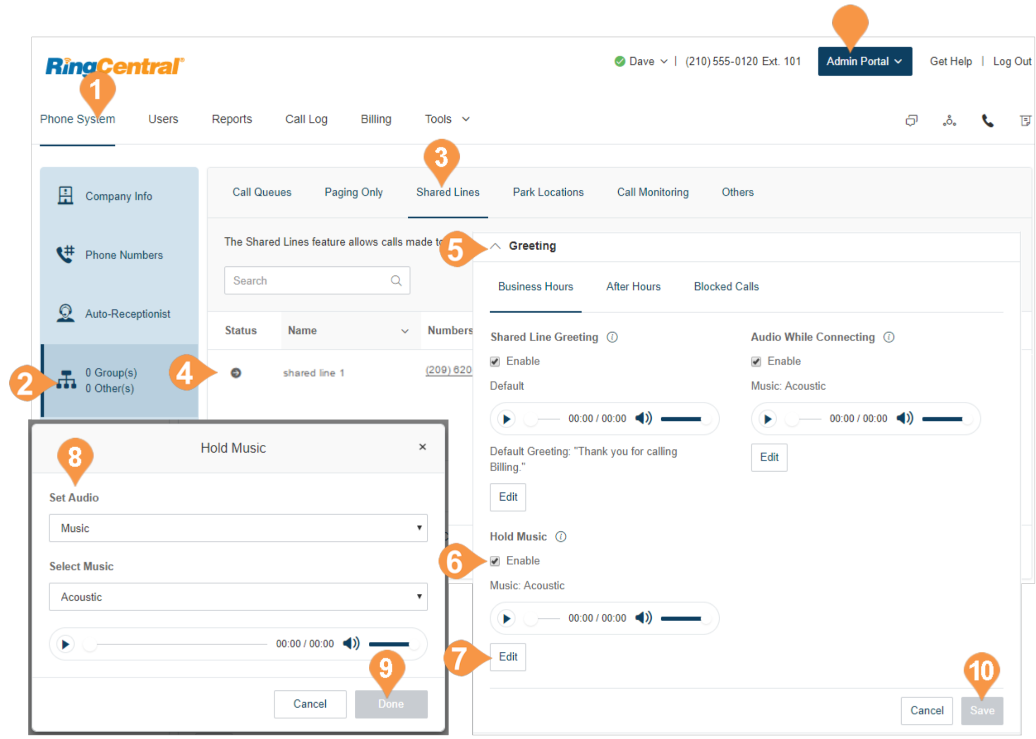
Set Custom Music on Hold

You can customize Music on Hold for shared lines to tailor the caller's waiting experience. The Music on Hold options include:

- Ringtones.
- Predefined music: Acoustic, Beautiful, Classical, Corporate, Country, Holiday, Latin, Modern Jazz, Nature, Reggae, World.
- Upload custom file in WAV or MP3 format.

To set up custom Music on Hold:

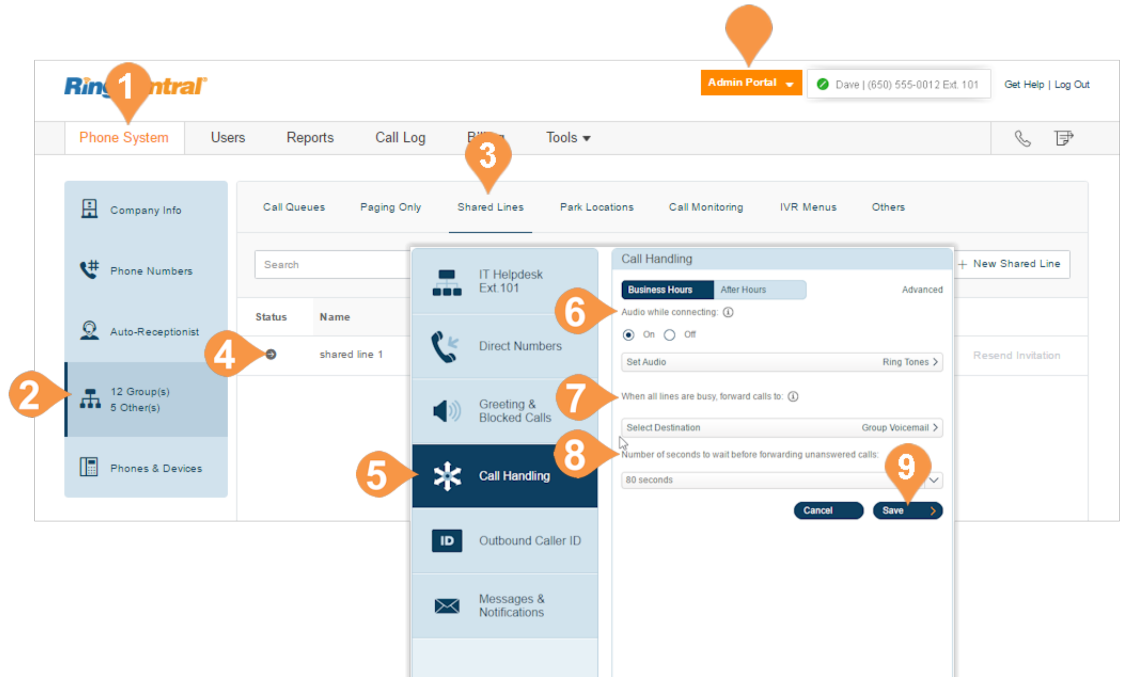
1. From **Admin Portal**, select **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Select **Greeting**.
6. Under **Hold Music**, check **Enable**.
7. Click **Edit** to customize your Music on Hold.
8. Select the audio type and select or upload music.
9. Click **Done**.
10. Click **Save**.



Call Handling

Review or change each option for handling incoming calls for both Business Hours and After Hours. Click the drop-down menu and set the number of rings to wait before forwarding unanswered calls to any value between 10 and 80 seconds.

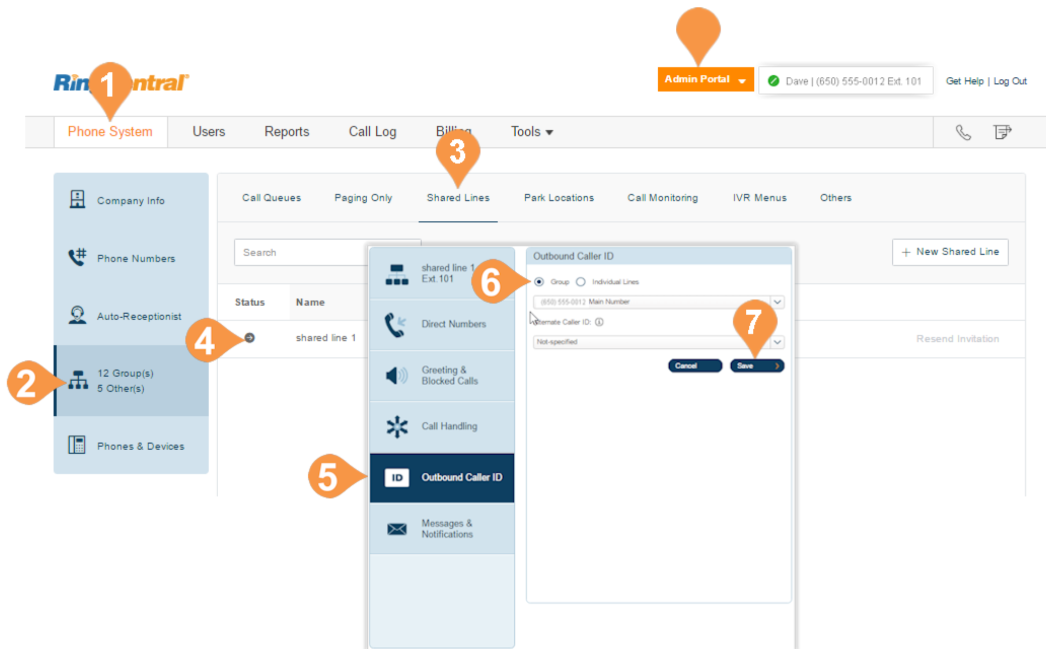
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select the **Shared Lines** tab.
4. Select an existing **Shared Lines** group
5. Click **Call Handling**.
6. Under **Audio while connecting**, select the button next to **On** and click **Set Audio**.
   a. Choose a **Ring Tone**, **Music**, **None** or **Custom** for your audio.
   b. Click **Save**.
7. Under **When all lines are busy forward calls to**, click **Select Destination**.
   a. Select the button next to the call destination you'd like to set.
   a. Click **Save**.
8. Under **Number of seconds to wait before forwarding unanswered calls** use the drop-down menu to choose a value between 10 and 80 seconds.
9. Click **Save**.



Outbound Caller ID

Set up an outbound caller ID for the group, or use individual numbers as caller IDs for each line.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Outbound Caller ID**.
6. Choose whether you'd like to use the one number as the caller ID for the entire group or if you'd like to use individual lines.
   a. **Group**: Select the button next to **Group** and choose a number from the drop-down menu.
   b. **Individual Lines**: Select the button next to **Individual Lines**.
7. Click **Save.**

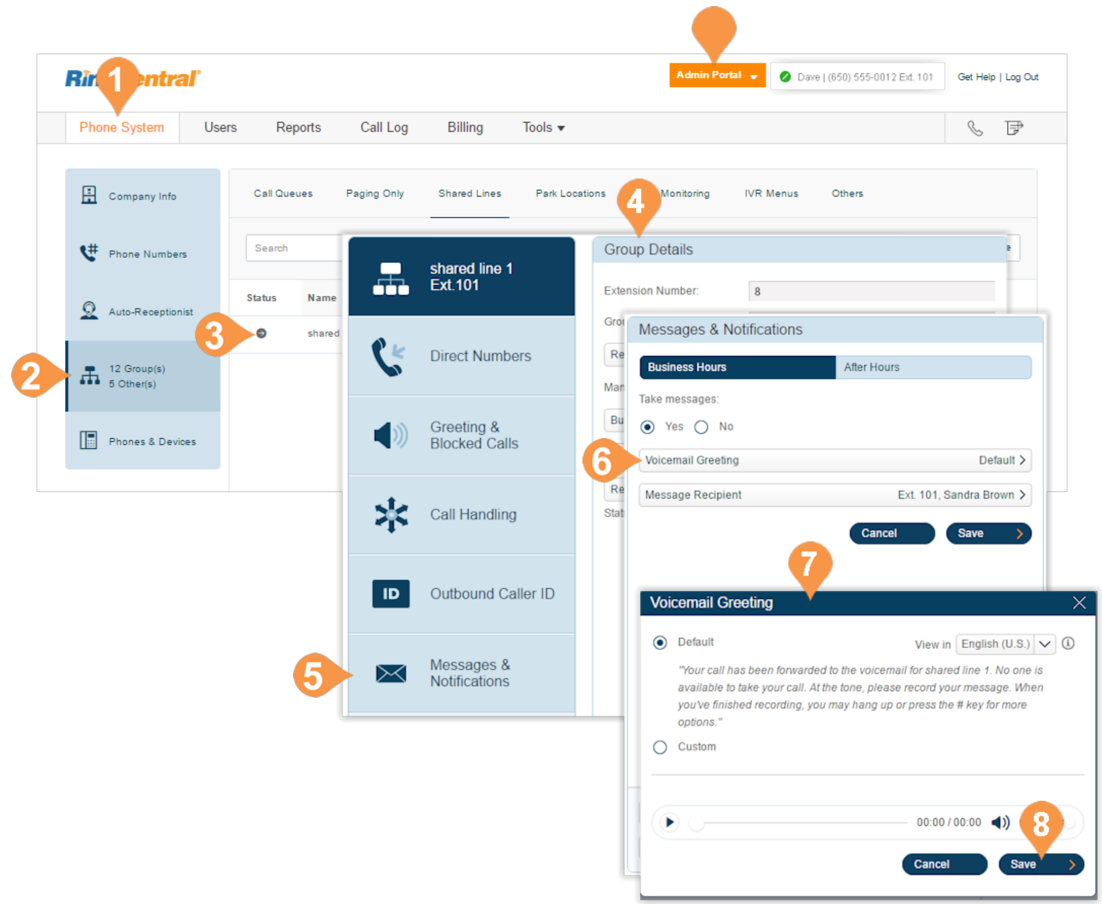


Messages & Notifications

Set up a group voicemail and notification options.

Voicemail Greeting

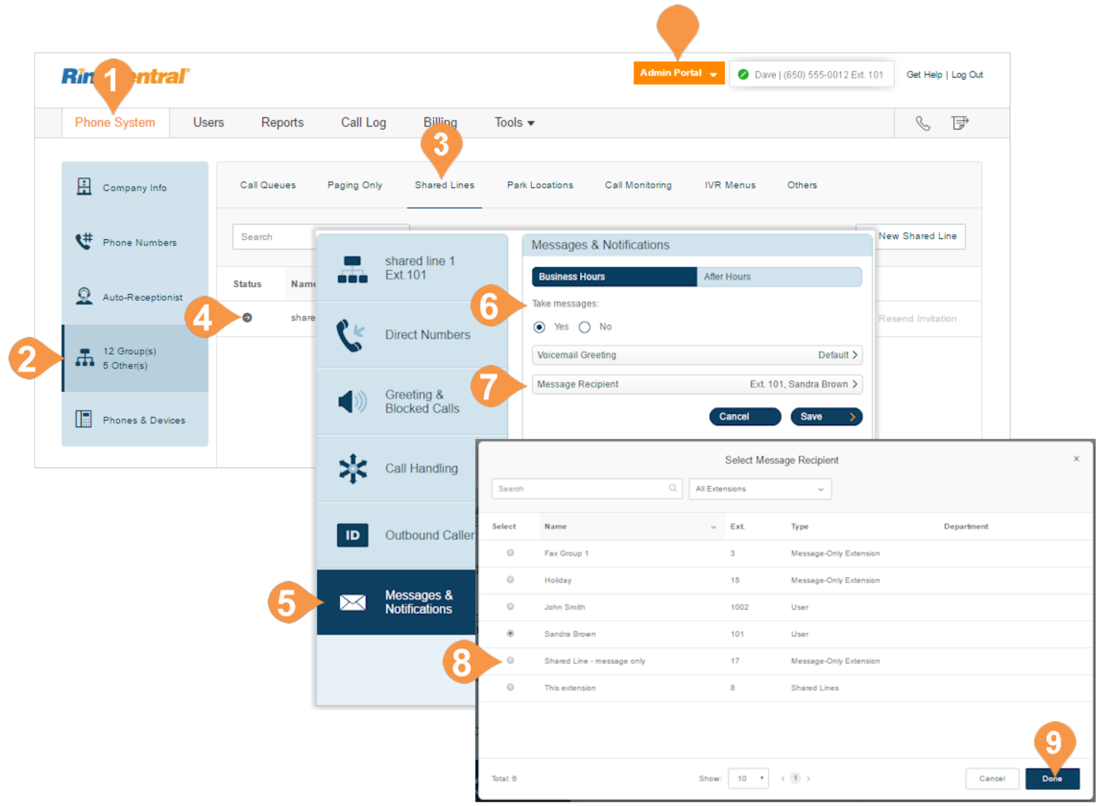
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group. The **Group Details** pop-up appears.
5. Click **Messages & Notifications.**
6. Click **Voicemail Greeting.**
7. A pop-up will appear displaying the current **Voicemail Greeting.** Choose your preferred type of greeting.
   a. **Default**: To use the provided greeting, select the button next to **Default.**
   b. **Custom**: Select the button next to **Custom** and then select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and RingCentral will call you to record your message.
      - **Record Using Computer Microphone Click Allow if RingCentral asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your company greeting.**
8. Click **Save.**



Message Recipient

Set a message recipient for a Shared Line.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.
6. Under **Take messages**, select the button next to **On**.
7. Click **Message Recipient.** The **Select Message Recipient** pop-up appears.
8. Select a message recipient.
9. Click **Done.**

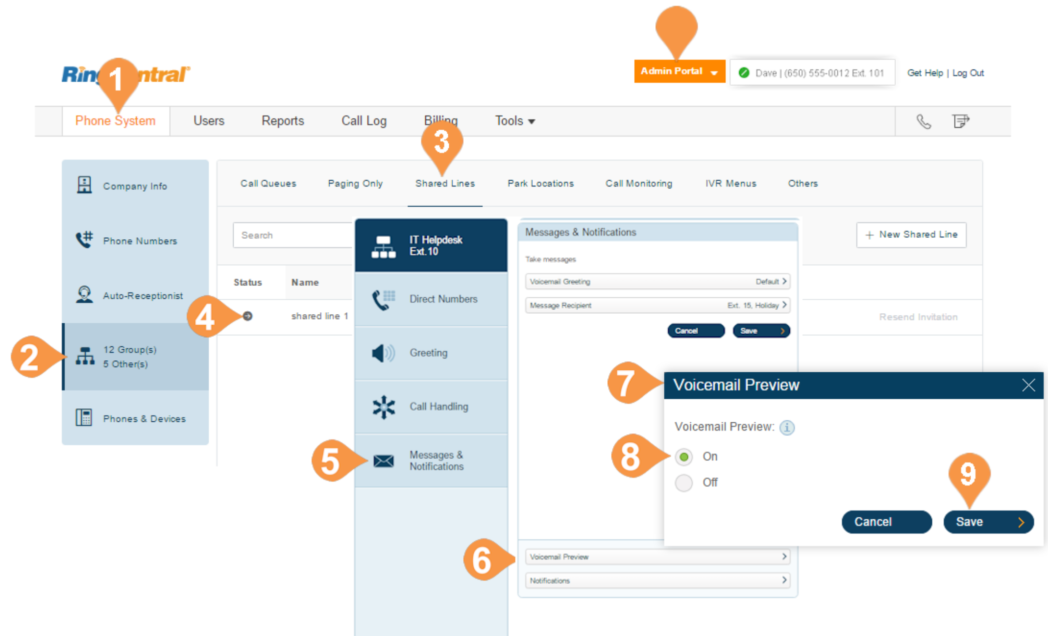


Voicemail Preview*

The voicemail preview provides the essential point of a voicemail message. It delivers the message to your RingCentral mobile or desktop application or via email.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Messages & Notifications**.
6. Click **Voicemail Preview**.
7. A pop-up will appear with the option to turn Voicemail Preview on or off.
8. Select the button next to **On** or **Off**.
9. Click **Save**.

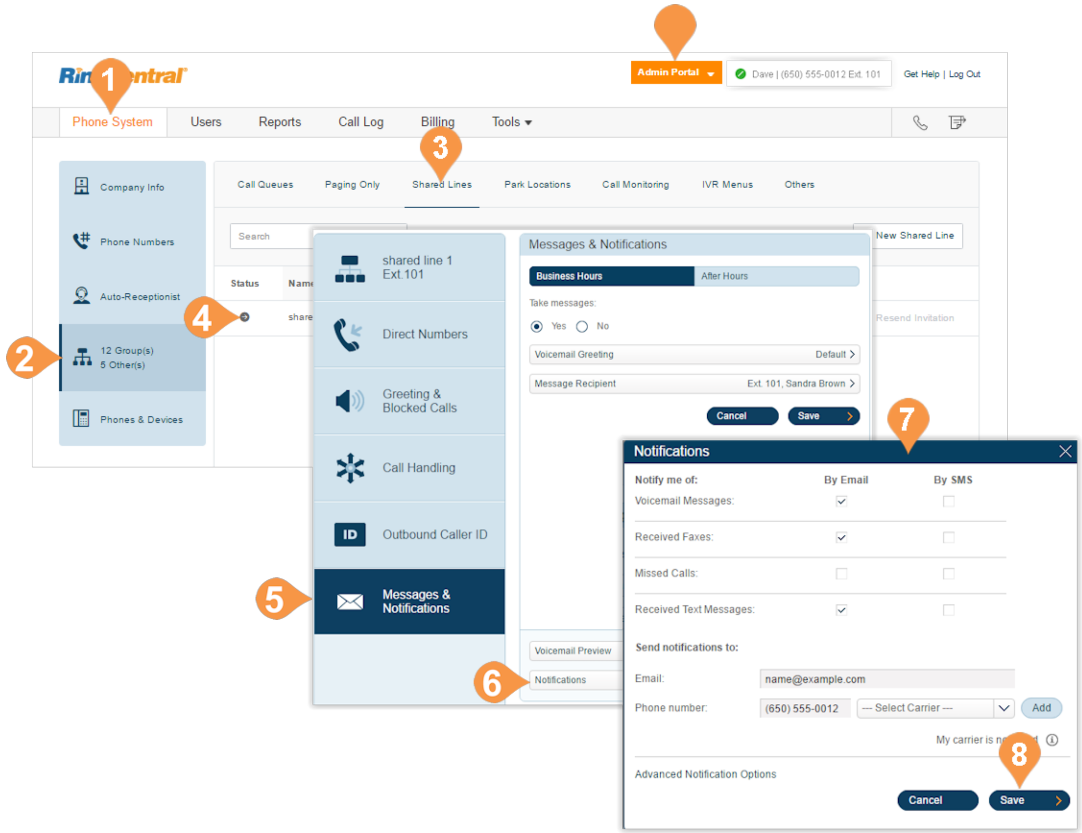
*Available for Ultimate users only.



Notifications

Choose who will receive notifications for voicemail messages and how they will receive them.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.
6. Click **Notifications**. A pop-up will appear with notification options.
7. Set your notification settings by checking the boxes and filling in email and phone numbers.
   a. Click **Advanced Notification Options** to see more detailed notification settings.
   b. Set your **Advanced Notification Options**. Here you can choose different email addresses and phone numbers for your notifications, select settings for marking messages as read, and select options for email attachments.
   c. Click **Switch to Basic Notification Settings**.
8. Click **Save**.



Park Location Group

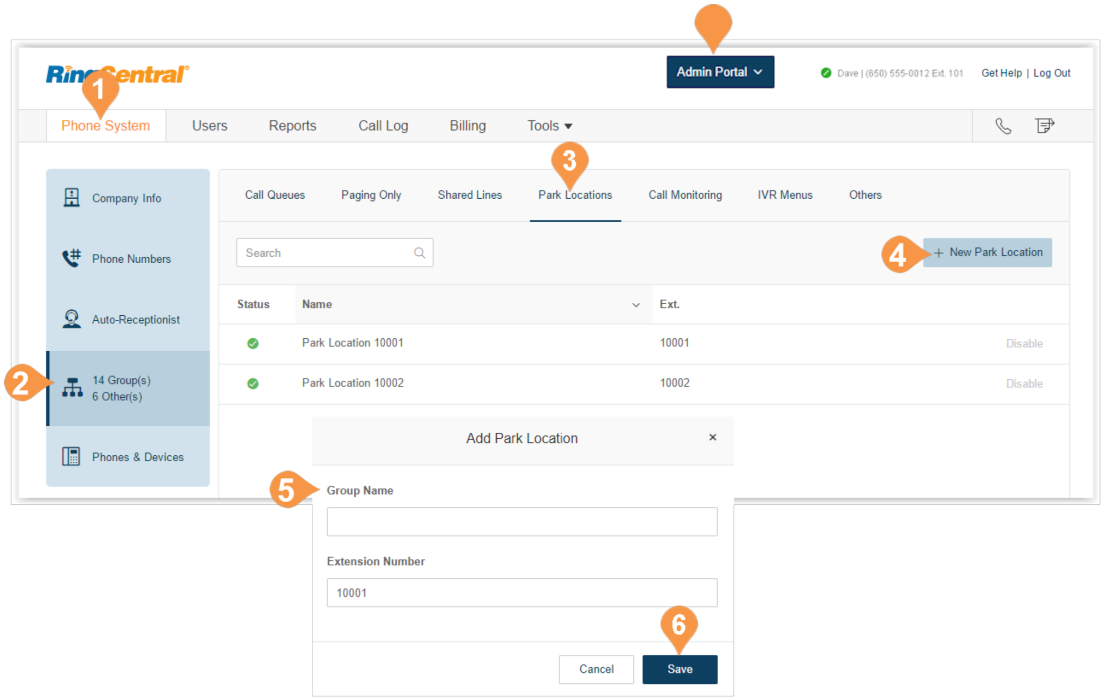
Park Locations

Use Park Location groups to create a private location in which specific users can park and pick up calls. Once users have been added to the group, the park location can be added to the user's Presence on a desk phone or HUD on RingCentral Phone. You can have up to 100 park locations in your phone system.

Add a Park Location

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Park Locations** tab.
4. Click **New Park Location**.
   The **Add Park Location** pop-up appears.
5. Enter the **Group Name** and **Extension Number**.
6. Click **Save**.

Note: Only one call can be parked in each location at a time.

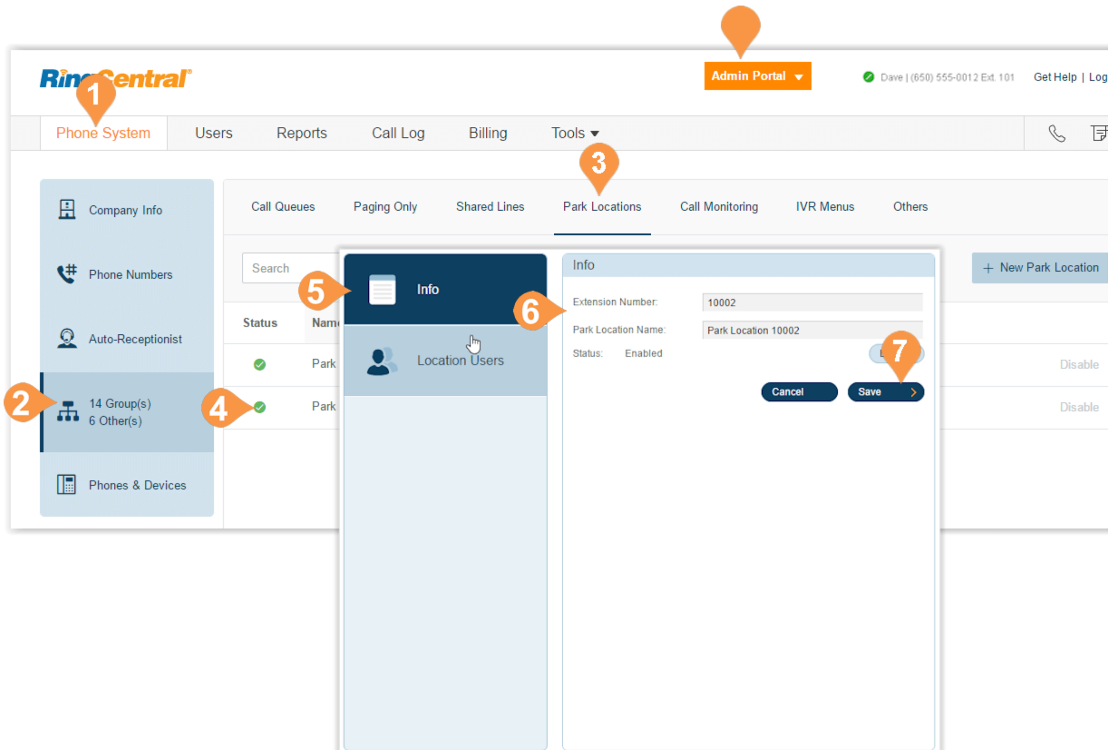


Configure a Park Location

After you have created a Park Location, you can edit its information and the users in the group.

To edit your Park Location's Extension Number and Name:

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Park Locations** tab.
4. Select an existing **Park Location.**
5. The **Info** pop-up appears.
6. Edit the **Extension Number** and **Park Location**.
7. Click **Save**.

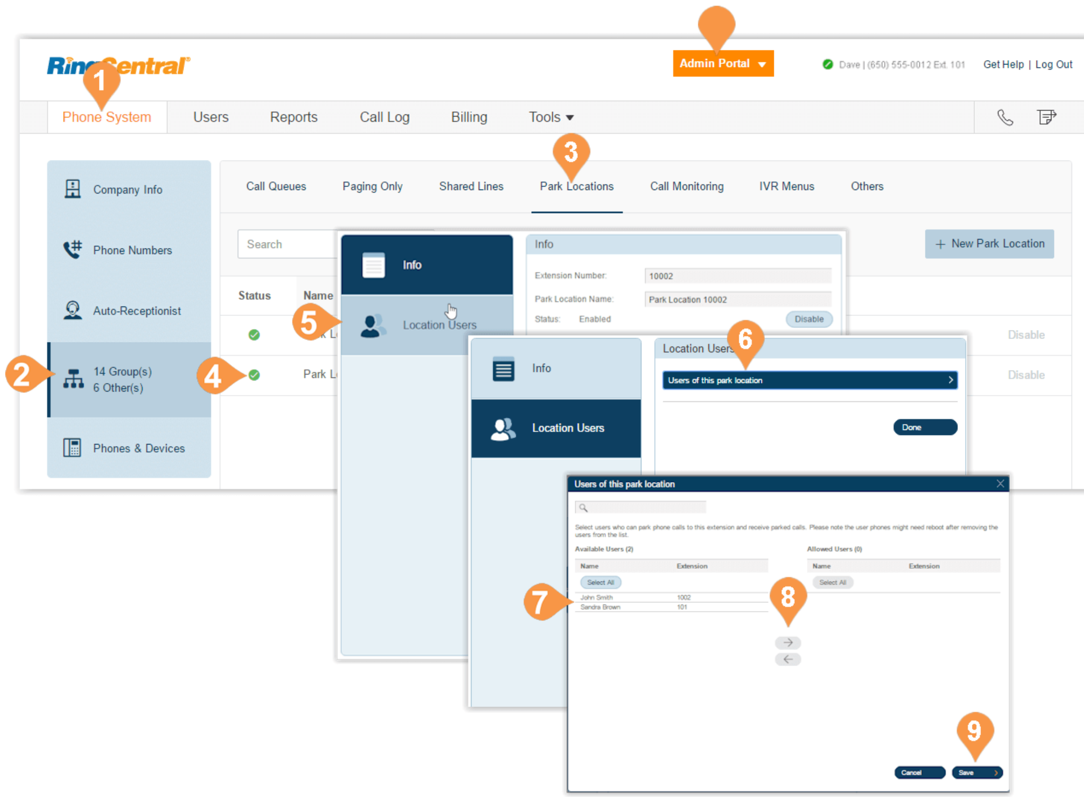


Add Users to a Park Location

To add or remove users from a Park Location:

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Park Location** tab.
4. Select an existing **Park Location**.
5. Click **Location Users**.
6. Click **Users of this park location**.
7. Select users you'd like to add to the group from the right column.
8. Click the blue arrow in the middle of the pop-up to move the selected users to the right column. You can also select users from the right column and move to the left column to remove them from the group.
9. Click **Save**.

Next, see “Enable this Park Location” on page 111.



Enable this Park Location

On your selected user's phones, go to the Users list, select the user and configure the park location extension:

1. Select **Phones & Numbers**.
2. Select **Presence**.
3. Select the **Appearance** tab.

Call Monitoring Group

Call Monitoring Group*

Call monitoring groups all authorized users to access calls made by other users in real time. These functions provide training, coaching, and QA tools for supervisors or other levels of the management team. They can also help improve teams' performance and productivity. The following actions are available for an authorized user in a call monitoring group: Monitor, Whisper, Barge, and Take Over.

To set up call monitoring, you'll need to create a call monitoring group and configure it. The system prompts you to select the users who will have permission to monitor, and lastly, select the users who can be monitored.

After creating a call monitoring group, users who have the permission to monitor others' calls will use the touch-tones on their phones to access the call monitoring features. These users will select a current call in progress on their phones then press the touch-tone for the action they'd like to take.

You must have a supported device with presence capabilities to use this feature. The following devices are supported:

- Polycom VVX 310
- Polycom VVX 410
- Polycom VVX 500
- Cisco SPA 303
- Cisco SPA 508G
- Cisco SPA 514G
- Cisco SPA 525G2
- RingCentral Phone

*Available for Office Premium and Ultimate users only.

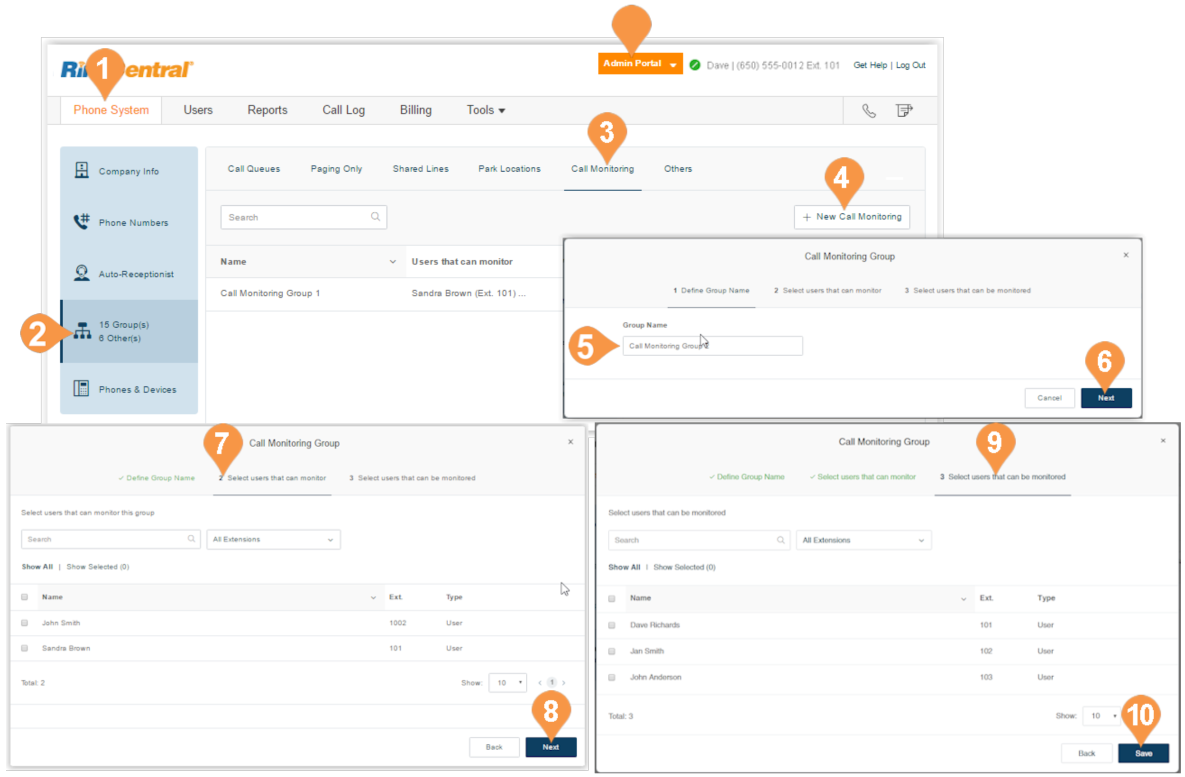
Action	Description	Example	Touch Tone
Monitor	Silently listen in on a call	Supervisors/QA to monitor performance	*80
Whisper	Speak only to the employee without the caller on the other end hearing	Provide support to users to help them handle a call	*81
Barge	Join the call so all parties can communicate with each other	Help facilitate discussion between all parties	*82
Take Over	Take over the call entirely and release the employee from the call	Allow the supervisor to handle a call and allow the employee to continue other tasks	*83

Add and Configure a Call Monitoring Group*

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Monitoring** tab.
4. Select **New Call Monitoring**. The **Add Group** pop-up appears.
5. Select the button next to **Call Monitoring**.
6. Click **Next**.
7. Enter a **Group Name**.
8. Click **Next**.
9. Select the users that can monitor this group.
10. Click **Next**.
11. Select the users that can be monitored by this group.
12. Click **Save**.

Note: The users who will be monitoring (for example, supervisors) can add the users who are monitored (for example, agents) in their desk phone Presence appearance. The desk phone may need to be rebooted after these settings have been changed.

*Available for Office Premium and Ultimate users only.



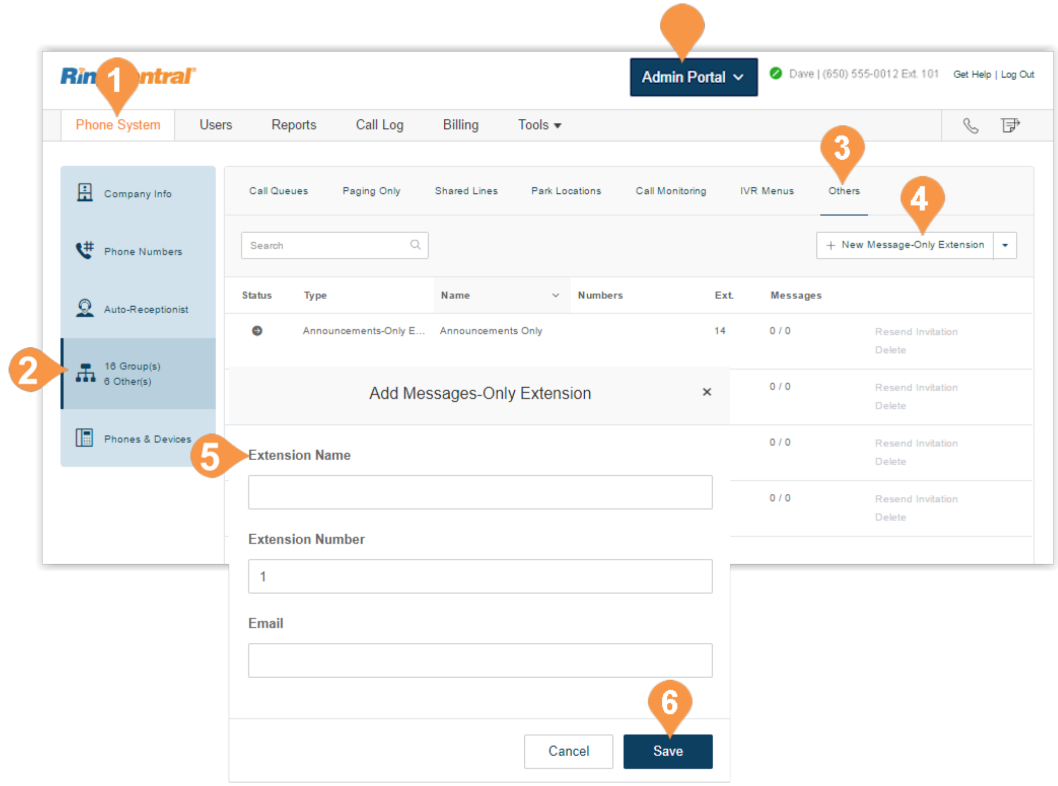
Message-Only Extension

Message-Only Extensions

Create an extension dedicated to receiving messages. All calls routed to this extension are automatically directed to the extension's voicemail box. .

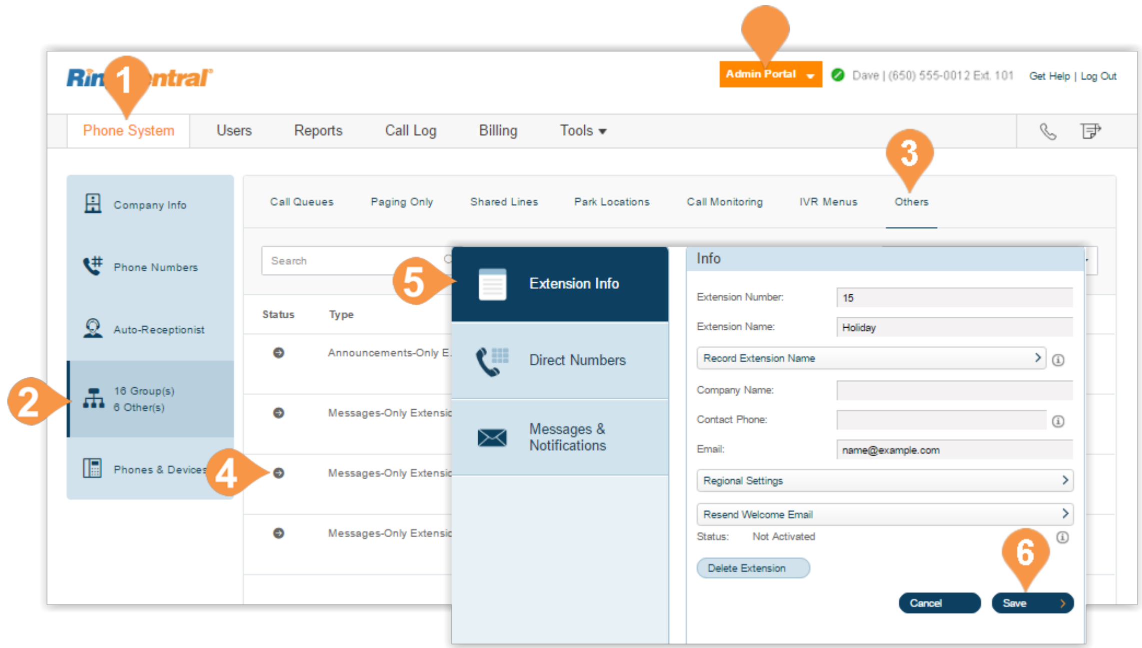
Add a Message-Only Extension

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Click **New Message-Only Extension**. The **Add Messages-Only Extension** pop-up appears.
5. Enter the **Extension Name**, **Extension Number**, and **Email.**
6. Click **Save.**



Configure a Message-Only Extension

After you've created a Message-Only Extension configure the Extension Info, Direct Numbers, and Messages & Notifications.



Extension Info

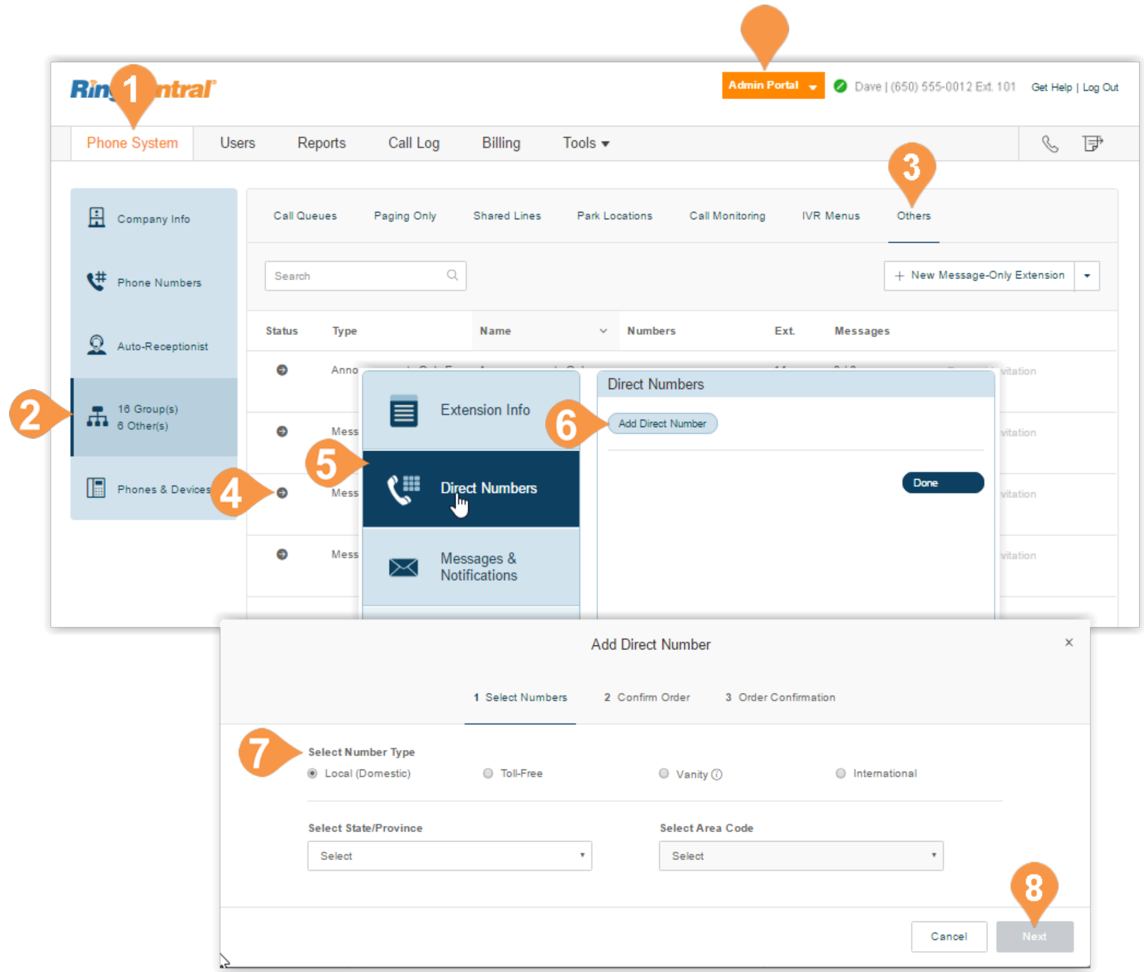
Edit your extension number, name, or delete your menu.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Extension Info** to edit the following:
   a. **Extension Number**
   b. **Extension Name**
   c. **Record Extension Name**
   d. **Company Name**
   e. **Contact Phone**
   f. **Email**
   g. **Regional Settings**
   h. **Resend Welcome Email**
   i. **Delete Extension**
6. Click **Save**.

Add a Direct Number

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**. The **Add Direct Number pop-up** appears.
7. Follow these instructions for your selection:
   a. **Local (Domestic)**: Select this button to add a local number, Provide the State/Province and Area Code and Select Number.
   b. **Toll-Free Number**: Select this button to add a Toll-Free number. Select a Toll-Free prefix and a number from the drop-down menu.
   c. **Vanity Number**: Select this button to add a Vanity number. Choose a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available.
   d. **International Number**: Select this button to add an International number. Then, select the button next to **Geographic Number** or **Toll-Free Number**. Call the phone number listed to order an international number.
8. Click **Next**.

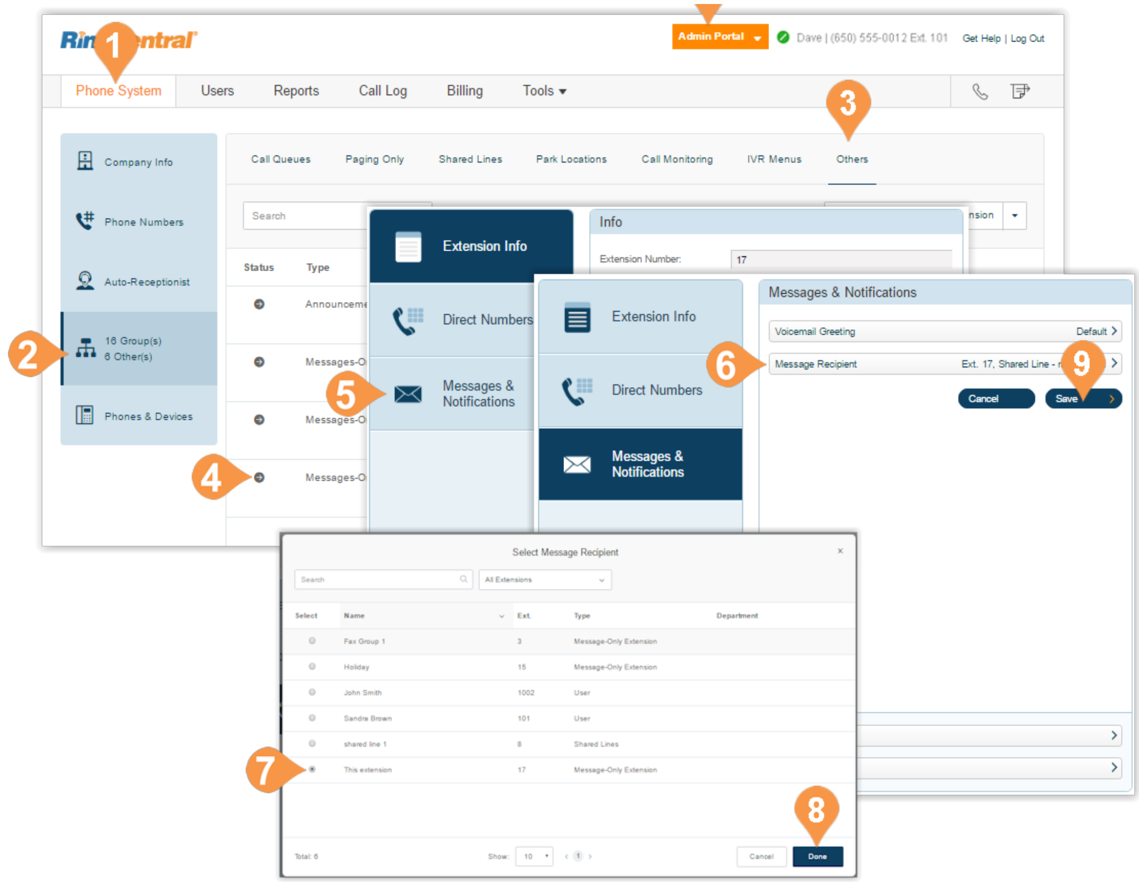
Follow the prompts to purchase your new number.



Message Recipient

Choose an extension to receive and save messages.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select a Message-Only Extension.
5. Click **Messages & Notifications**.
6. Click **Message Recipient**. The **Select Message Recipient** pop-up appears.
7. Select the user.
8. Click **Done**.
9. In the **Messages & Notifications** pop-up, click **Save**.

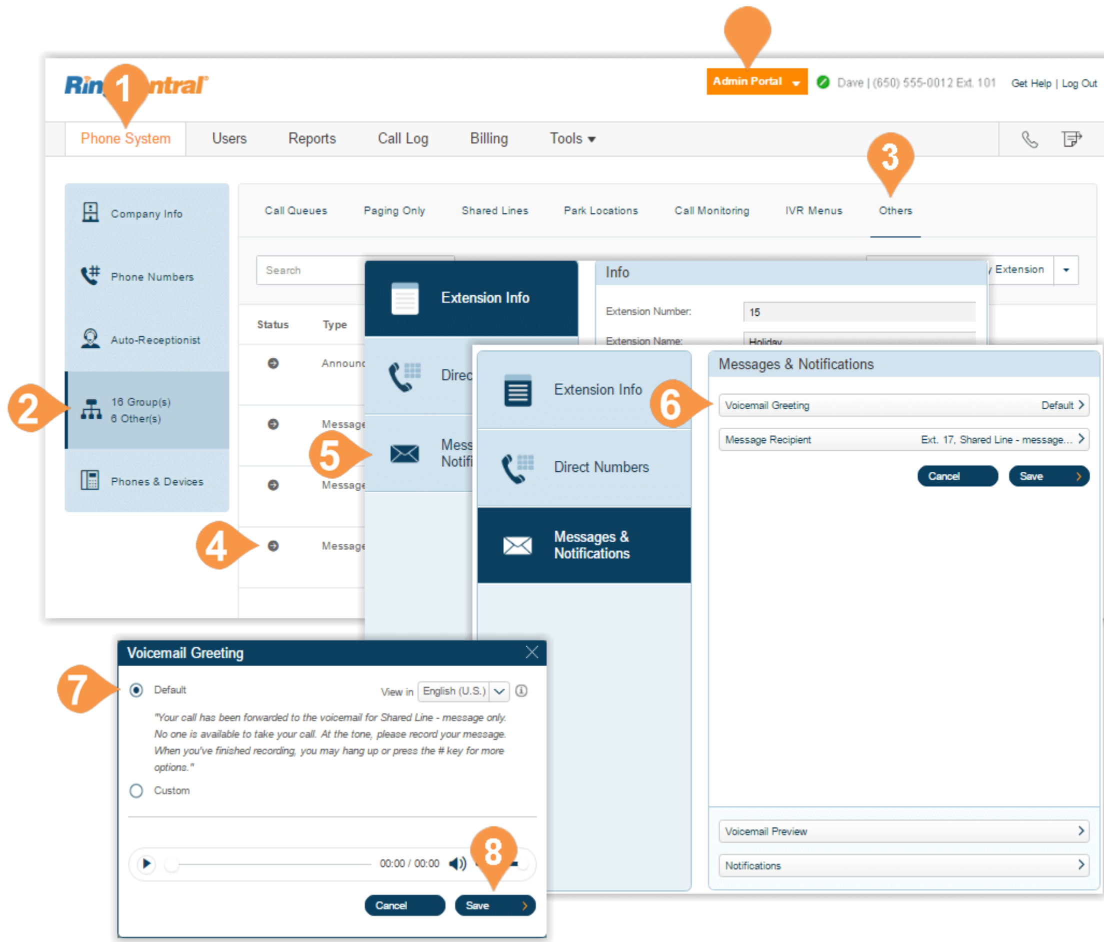


Messages and Notifications

Set the voicemail greeting you would like to use for your Message-Only Extension. This feature is available to Ultimate users only.

Set a Voicemail Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Message-Only Extension.**
5. Click **Messages & Notifications.**
6. Click **Voicemail Greeting.**
7. A pop-up will appear displaying the current **Voicemail Greeting.** Choose your preferred type of greeting.
   a. **Default**: Select the button next to **Default**.
   b. **Custom**: Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and RingCentral will call you to record your message.
      - **Import**
        Browse for a WAV or MP3 file you want to use. Click **Attach**., then **Save**.
      - **Record Using Computer Microphone**
        Click **Allow** if RingCentral asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your company greeting.
8. Click **Save.**

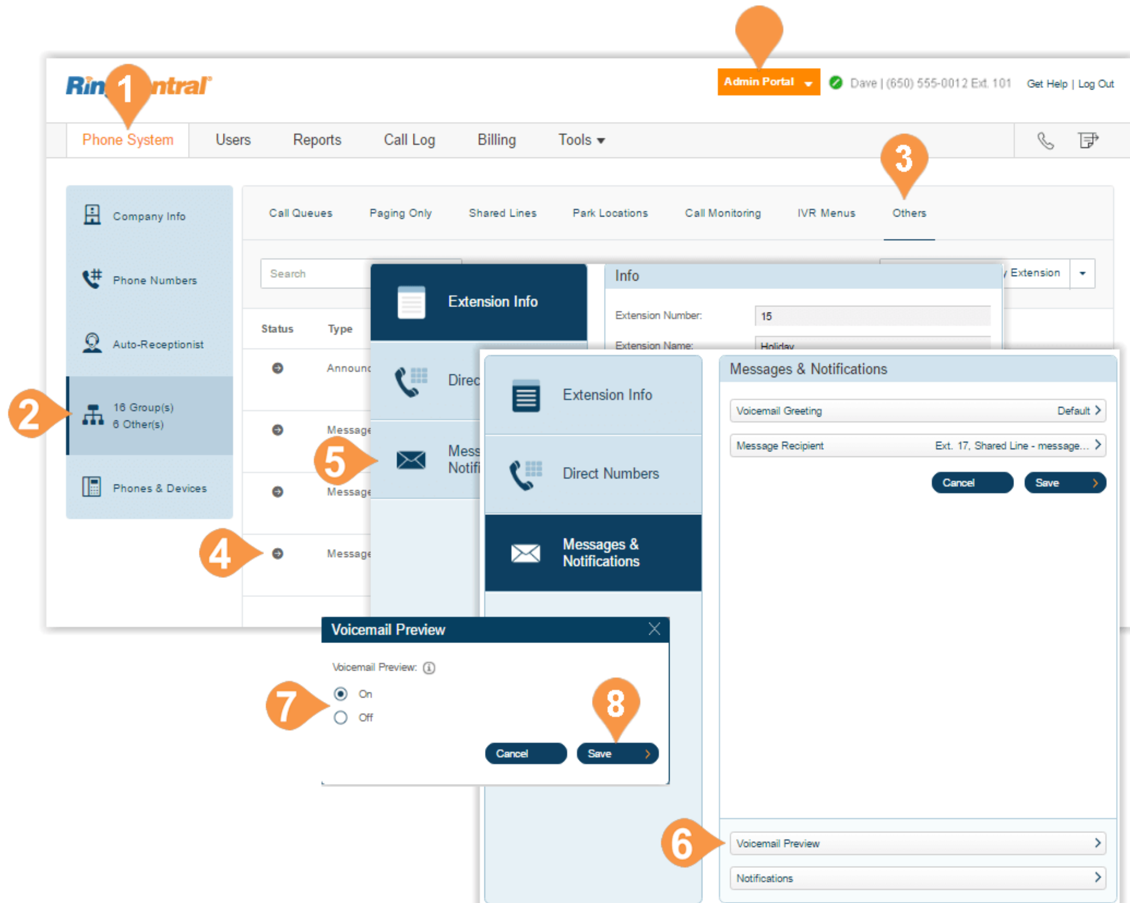


Set Voicemail Preview*

The voicemail preview provides a text version of your voicemail that lets you get the essential point of the message. It delivers a text version of your voicemail to your RingCentral mobile or desktop application or via email.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select the **Others** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Messages & Notifications**.
6. Click **Voicemail Preview**. The **Voicemail Preview** pop-up appears.
7. Select the button next to **On** or **Off**.
8. Click **Save**.

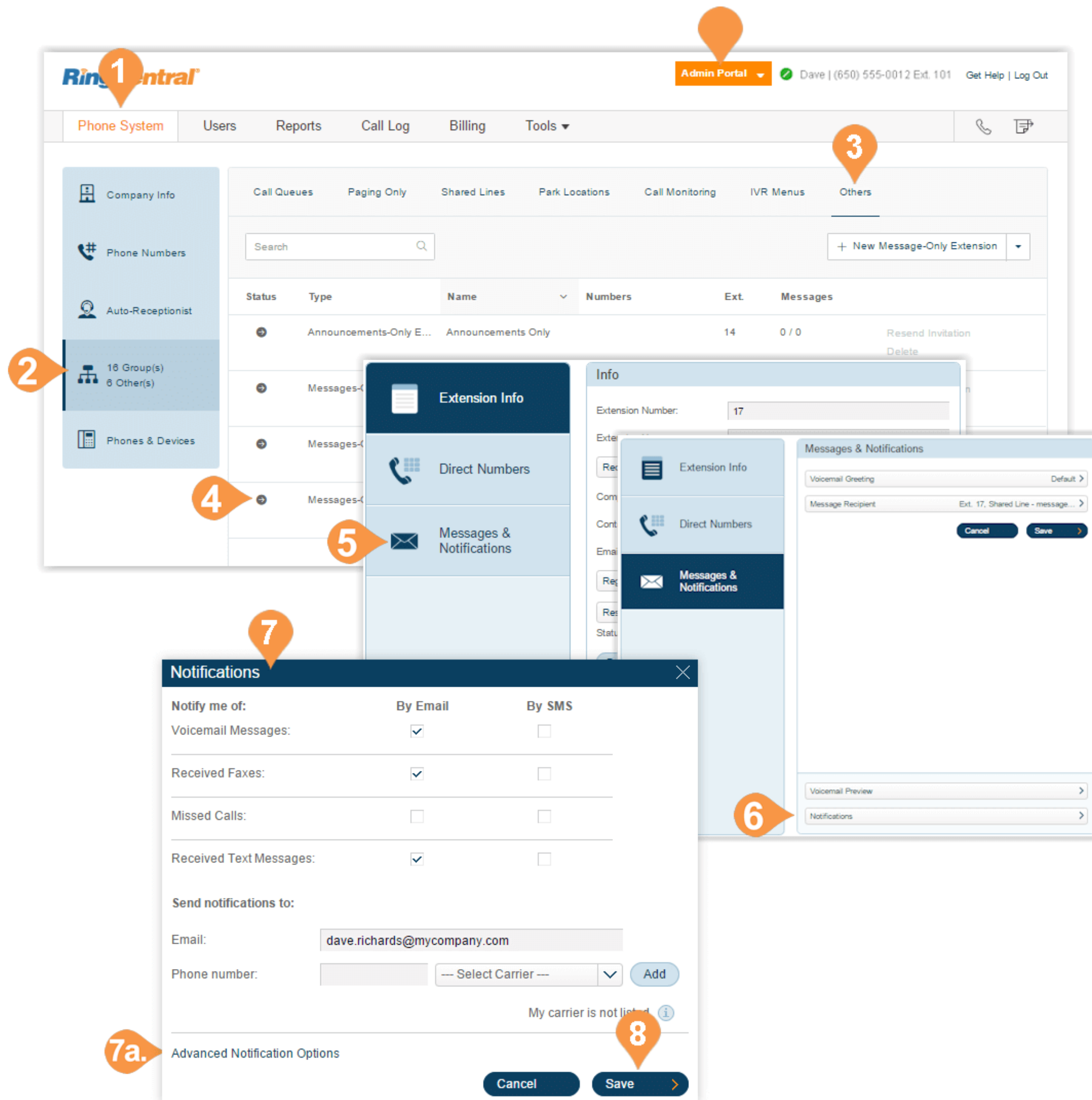
*Available for Ultimate users only.



Notifications

Choose who will receive notifications for voicemail messages and how they will receive them.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Messages & Notifications**.
6. Click **Notifications**.
7. A pop-up will appear with notification options. Set your notifications by checking the boxes and filling in email and phone numbers.
   a. Click **Advanced Notification Options** to see more detailed notification settings.
   b. Set your **Advanced Notification Options**. Here you can choose different email addresses and phone numbers for your notifications, select settings for marking messages as read, and select options for email attachments.
   c. To return to the previous Notifications pop-up, Click **Switch to Basic Notification Settings**.
8. Click **Save**.

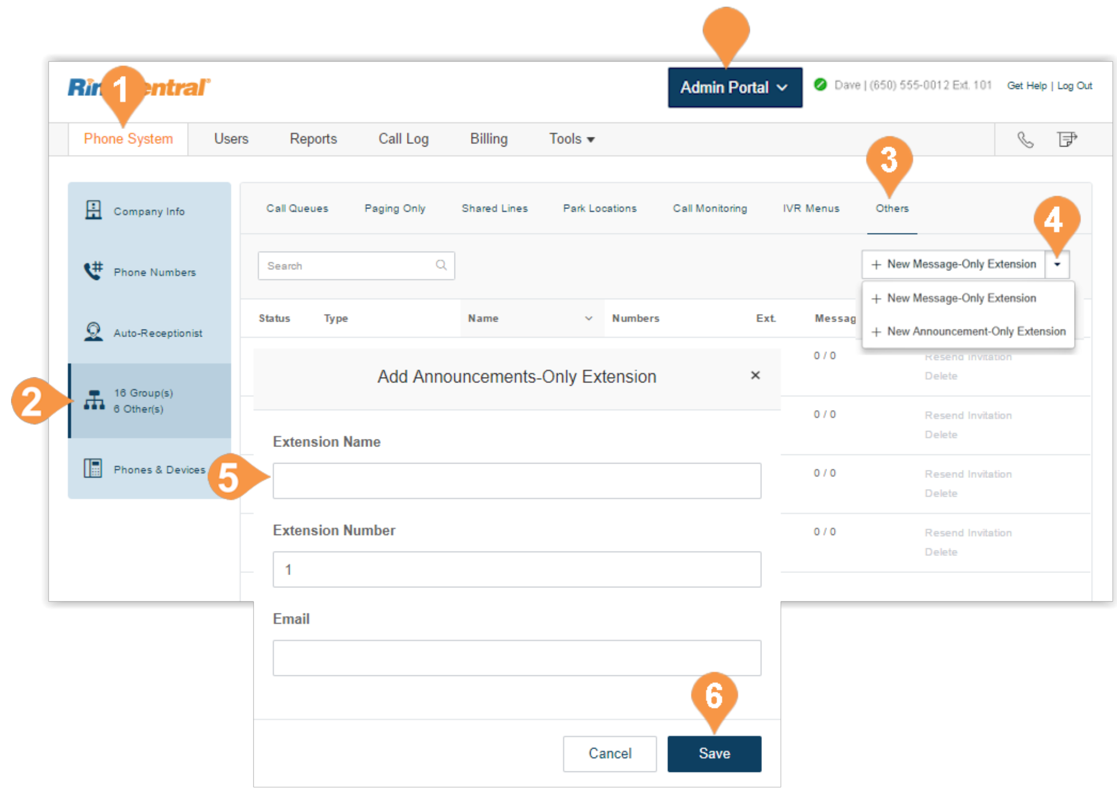


Announcements-Only Extension

Announcements-Only Extensions

Create an extension that only plays an announcement for your callers. All callers routed to this extension hear a recorded announcement such as a holiday closure announcement. Add an Announcements-Only Extension.

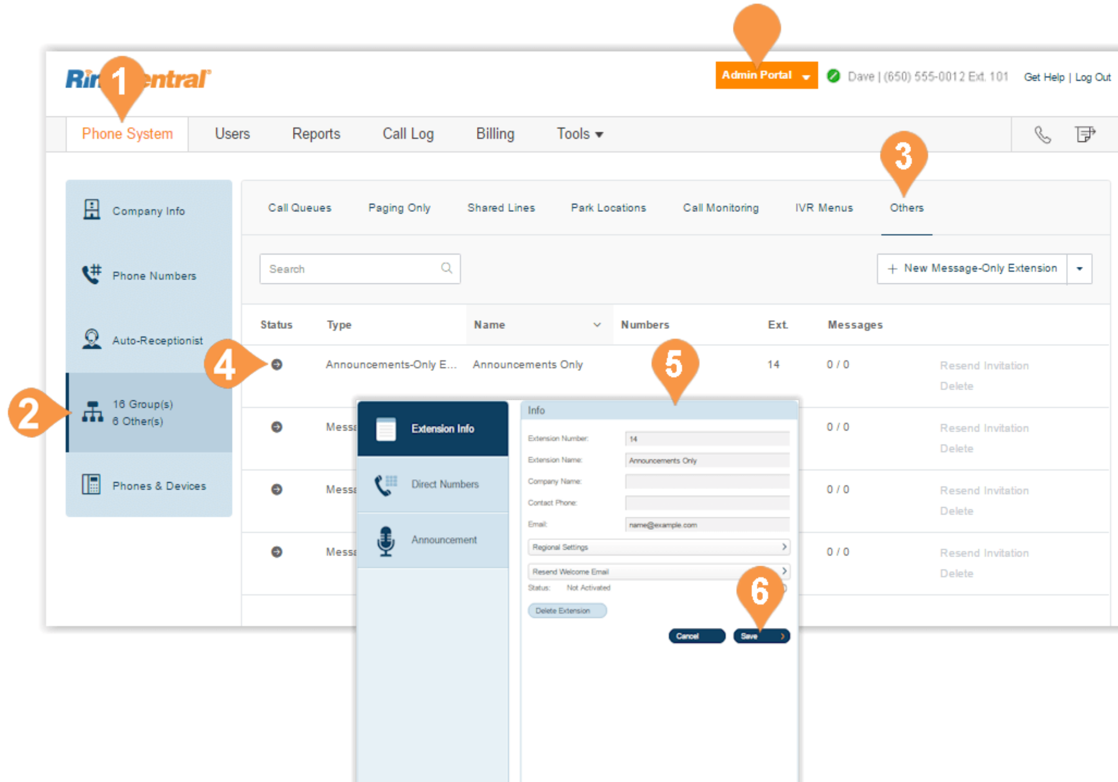
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select **New Announcements-Only Extension** from the menu.
   The **Add Announcements-Only Extension** pop-up appears.
5. Enter the **Extension Name**, **Extension Number**, and **Email**.
6. Click **Save.**



Edit Announcements-Only Extension Info

Edit your Announcements-Only extension number, name, or delete the extension.

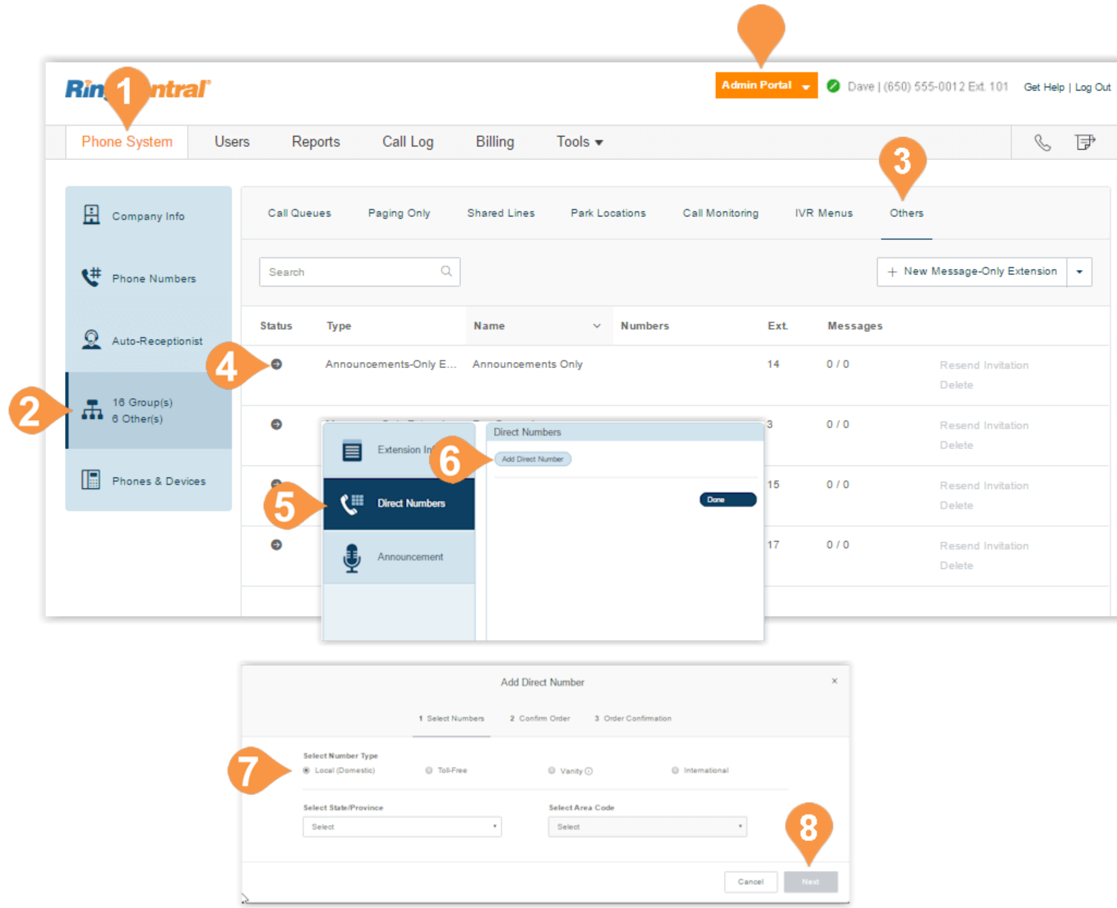
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Announcements-Only Extension**.
5. Edit the **Info** for the extension:
   a. **Extension Number**
   b. **Extension Name**
   c. **Company Name**
   d. **Contact Phone**
   e. **Email**
   f. **Regional Settings**
   g. **Resend Welcome Email**
   h. Delete Extension
6. Click **Save**.



Add a Direct Number

Add a direct number to an existing announcement-only extension.

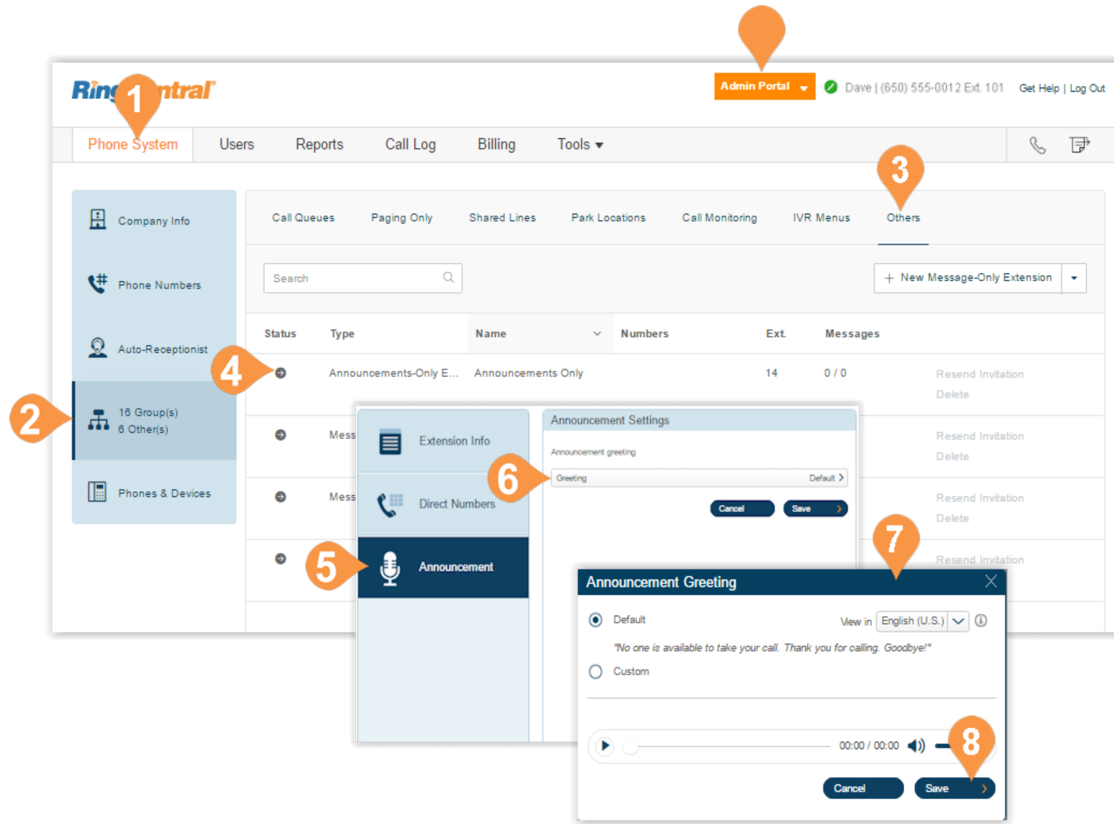
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing Announcement-Only Extension.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Follow these instructions for your selection:
   a. **Local (Domestic)**: Select this button to add a local number, Provide the State/Province and Area Code and Select Number.
   b. **Toll-Free Number**: Select this button to add a Toll-Free number. Select a Toll-Free prefix and a number from the drop-down menu.
   c. **Vanity Number**: Select this button to add a Vanity number. Choose a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available.
   d. **International Number**: Select this button to add an International number. Then, select the button next to **Geographic Number** or **Toll-Free Number**. Call the phone number listed to order an international number.
8. Click **Next**. and follow the prompts to purchase your new number.



Set an Announcement

Customize a greeting for an announcement-only extension.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Groups**.
3. Click the **Others** tab.
4. Select an **Announcements-Only Extension**.
5. Click **Announcement.**
6. Click **Greeting**
   A pop-up will appear displaying the current announcement.
7. Choose your preferred type of announcement.
   a. **Default**: Select the button next to **Default**.
   b. **Custom**: Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and RingCentral will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if RingCentral asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your announcement through your computer microphone. Stop the recording and listen to the playback.
      - **Import**
        Browse for a WAV or MP3 file you want to use. Click **Attach**.
8. Click **Save**.

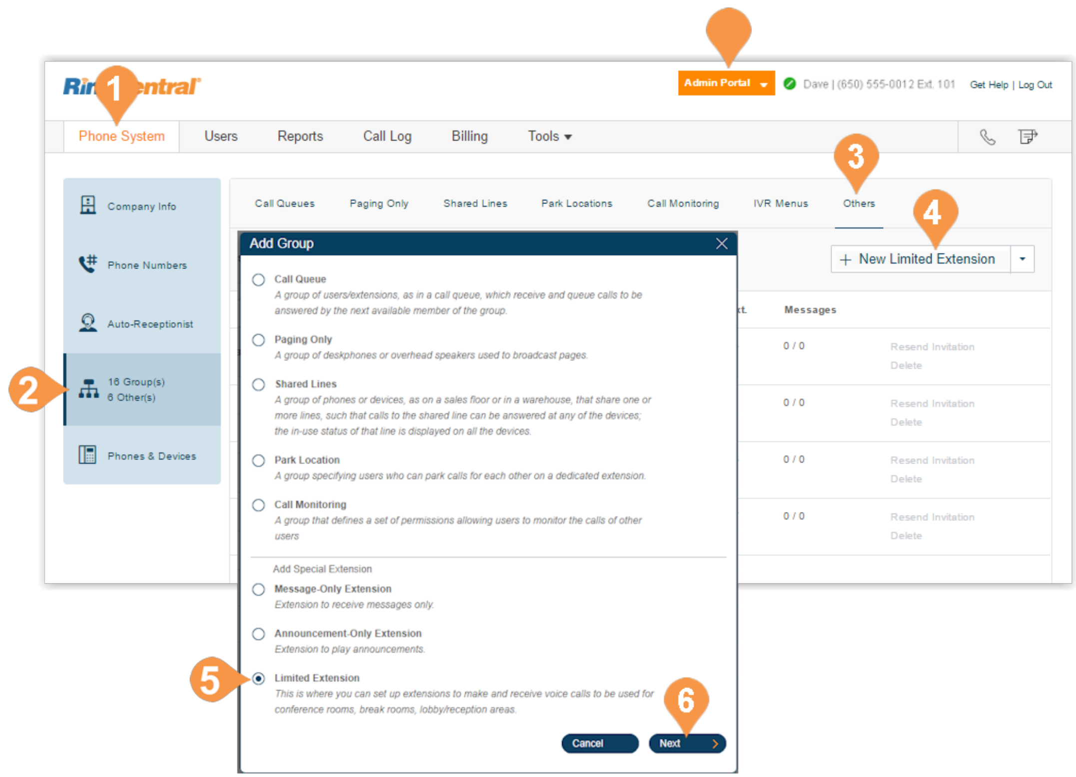


Limited Extension

Limited Extensions

Create limited extensions* for installation in a common area (meeting room or hotel room) for anyone who has the need to access basic inbound/outbound calling capabilities.

RingCentral provides the ability to separately purchase limited extensions as unassigned extensions and then later set up and activate those extensions by assigning them. Bulk purchases of up to 1,000 extensions are also supported.



Add a Limited Extension

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Click **New Limited Extension**.
5. Select the button next to **Limited Extension**.
6. Click **Next**.

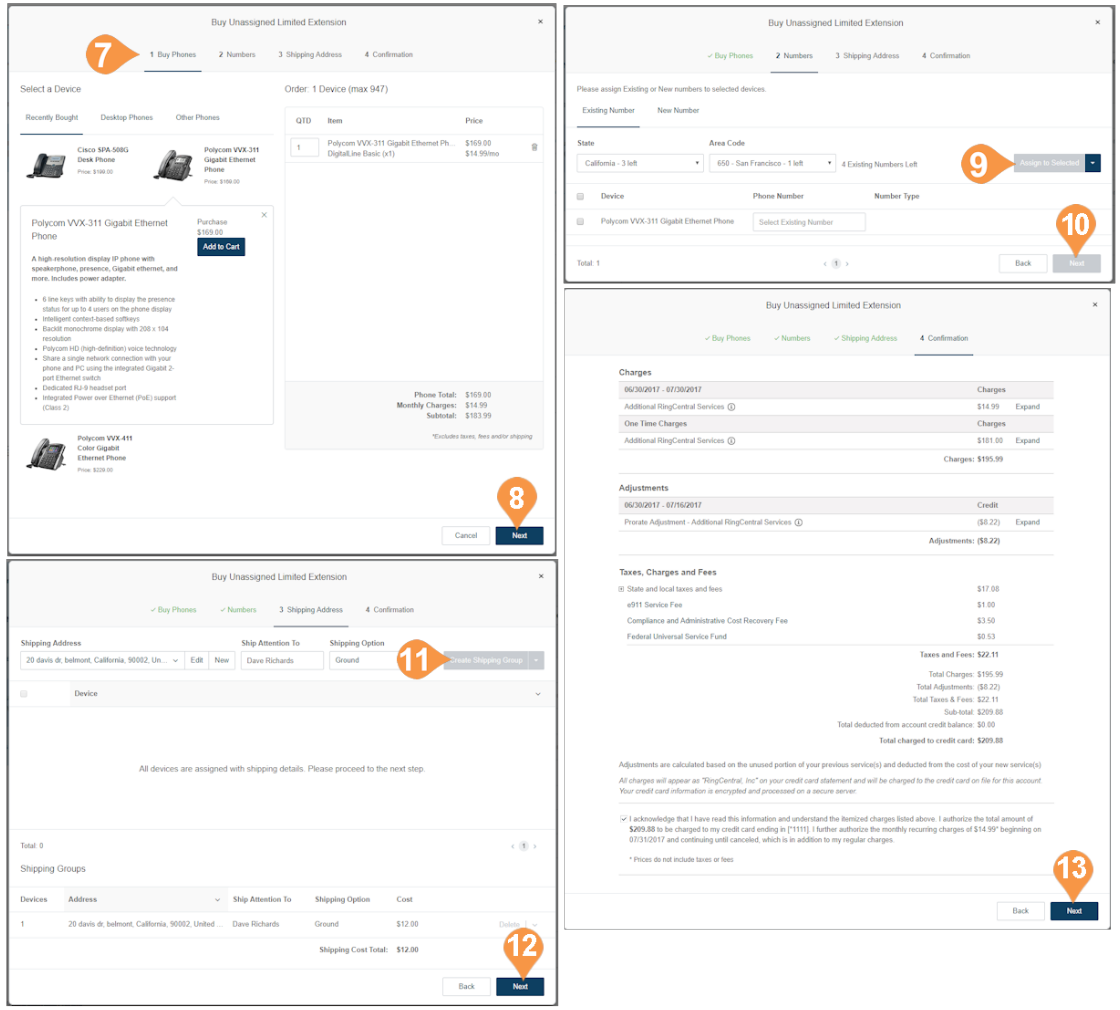
*This feature is available on an on-demand basis. Contact RingCentral Support to discuss the requirements for enabling this feature for your account.

continued on the next page...

7. Select a device for use as limited extension.
8. Click **Next**.
9. Assign a number from **Assign to Selected** menu.
10. Click **Next**.
11. Select your shipping options.
12. Click **Next**.
13. Click **Next** to confirm the order.

An order summary is displayed.

Once the purchase of a limited extension is complete, it will appear in your account with an unassigned status. You can activate unassigned extensions as needed. Once assigned, a limited extension can be unassigned or reassigned as needed.

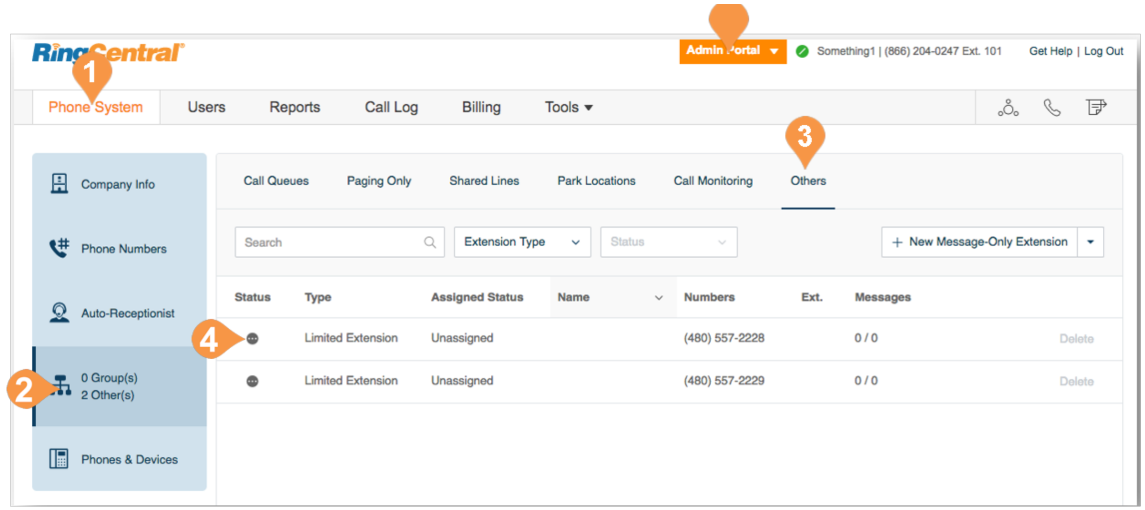


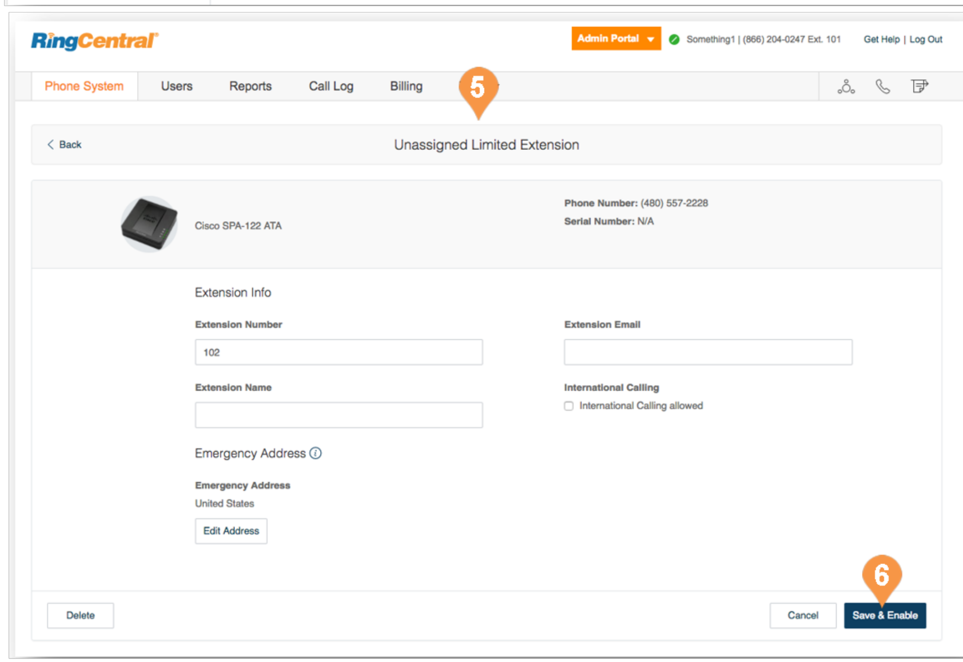
Assign a Limited Extension

To assign a limited extension and enter extension info:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Click a **Limited Extension** with **Unassigned** status. If needed, you can filter extensions by Extension Type.
5. Set the extension information:
   a. **Extension Number**
   b. **Extension Name**
   c. **Emergency Address**
   d. **Extension Email**
   e. **International Calling Allowed**
6. Click **Save & Enable**.

The status for the extension becomes **Assigned**.

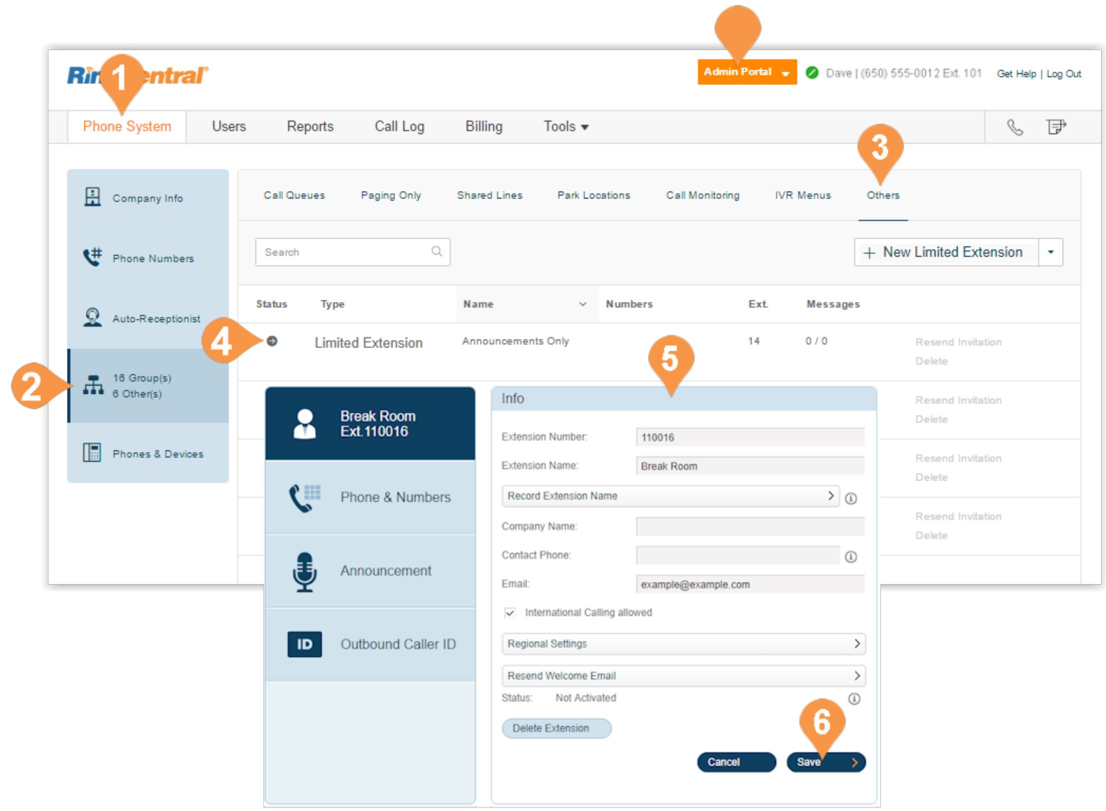




Edit Limited Extension Info

Edit your Limited extension number.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Limited Extension**.
5. Edit the **Info** for the extension:
   f. **Extension Number**
   g. **Extension Name**
   h. **Record Company Name**
   i. **Company Name**
   j. **Company Phone**
   k. **Email**
   l. **International Calling Allowed**
   m. **Regional Settings**
6. Click **Save**.



Phones and Devices

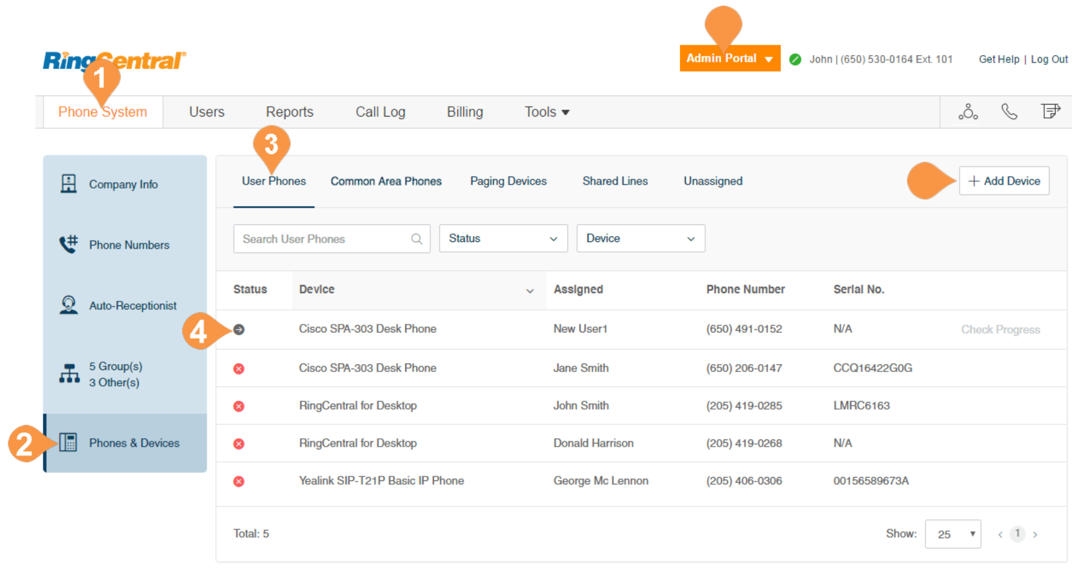
Phones and Devices

This section provides you a view of all phones that are associated with your RingCentral Office account. You can also add phones and devices from this section.

View and Edit Devices

To view and edit devices on your account:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click on the tabs at the top panel to see:
    a. **User Phones**
    b. **Common Area (Hot Desk) Phones**
    c. **Paging Devices**
    d. **Shared Lines**
    e. **Unassigned**
4. Click on a device to view and edit details.



Search Devices

You can search or filter the phones or devices by specifying search text, status, or device, and selecting the search icon. The search displays results for devices meeting the search criteria in the device category.

Add a Device

You can add a phone or device by clicking **Add Device** in the upper right. See the next pages for more detailed instructions.

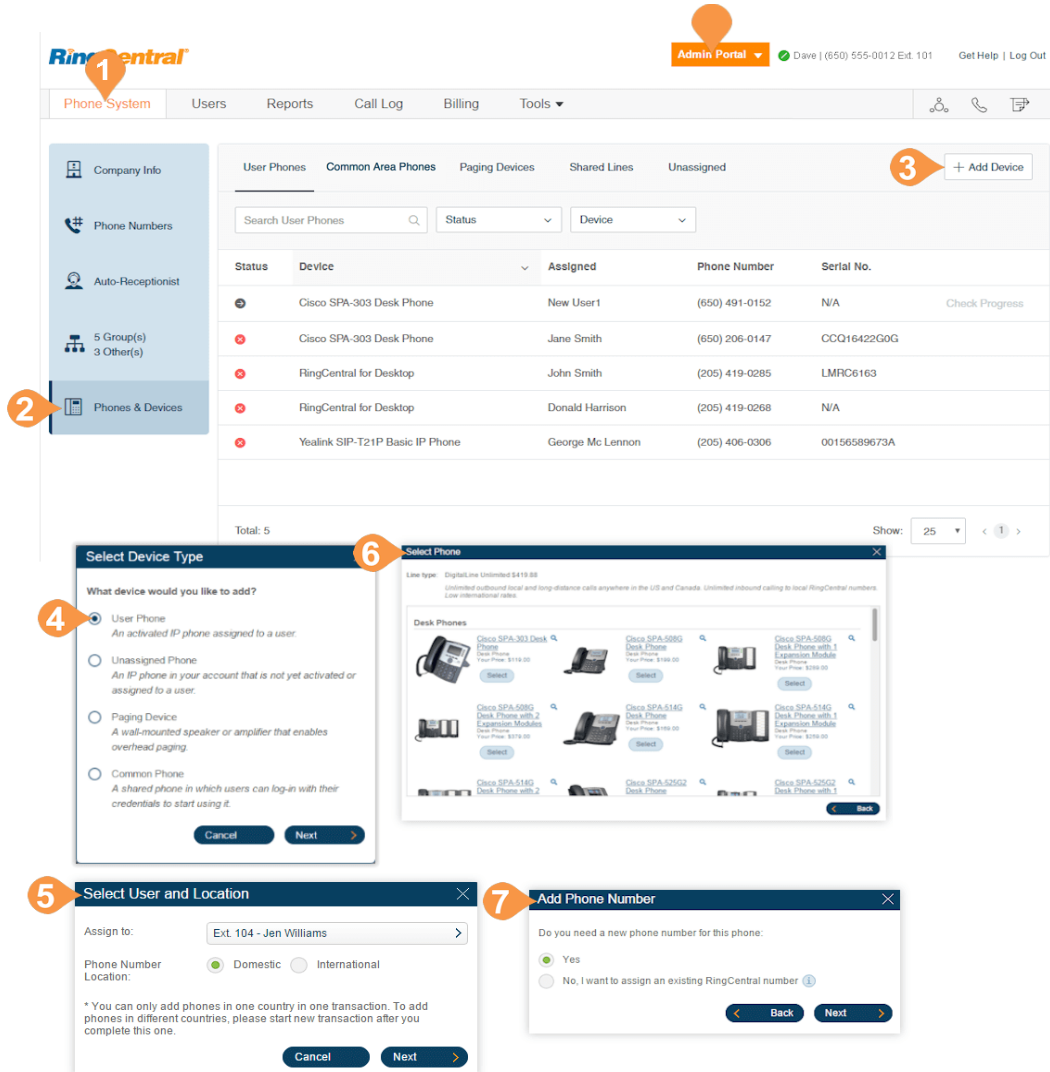
Add a User Phone

To add a user phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click **Add Device**.
4. Select a user to assign the phone to.
5. Select a phone to buy.

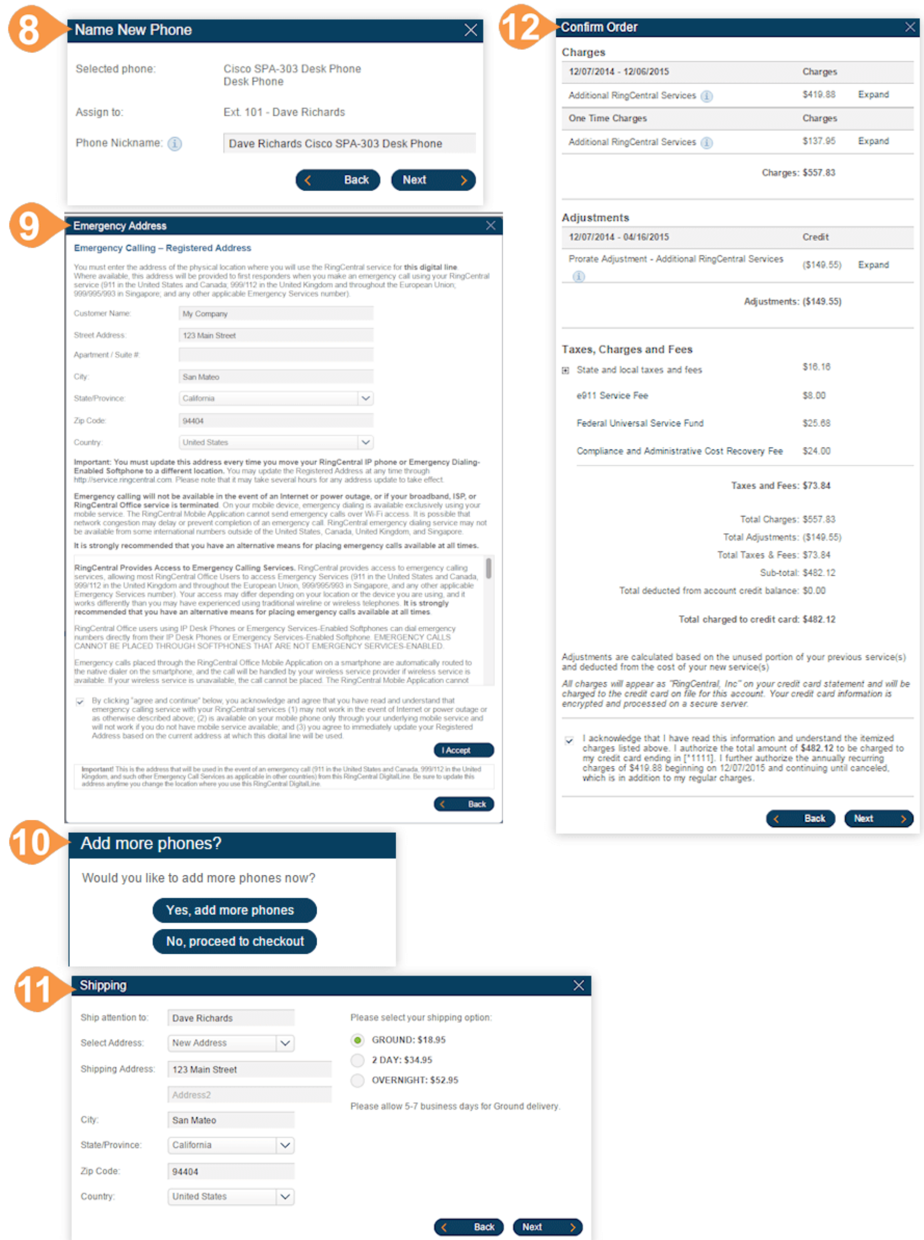
Instructions continue on the next page.

*You can only add devices for one country at time. Repeat the process for different countries as needed.



6. Name your new phone.
7. Register your emergency address.
8. Choose to add more phones or proceed to checkout.
9. Select your shipping preferences and click **Next**.
10. Confirm your order by checking the acknowledgment box and click **Next**.

Note: When adding international phones, you will also need to register an emergency address in the selected country for your phone. Review these details when confirming your order.

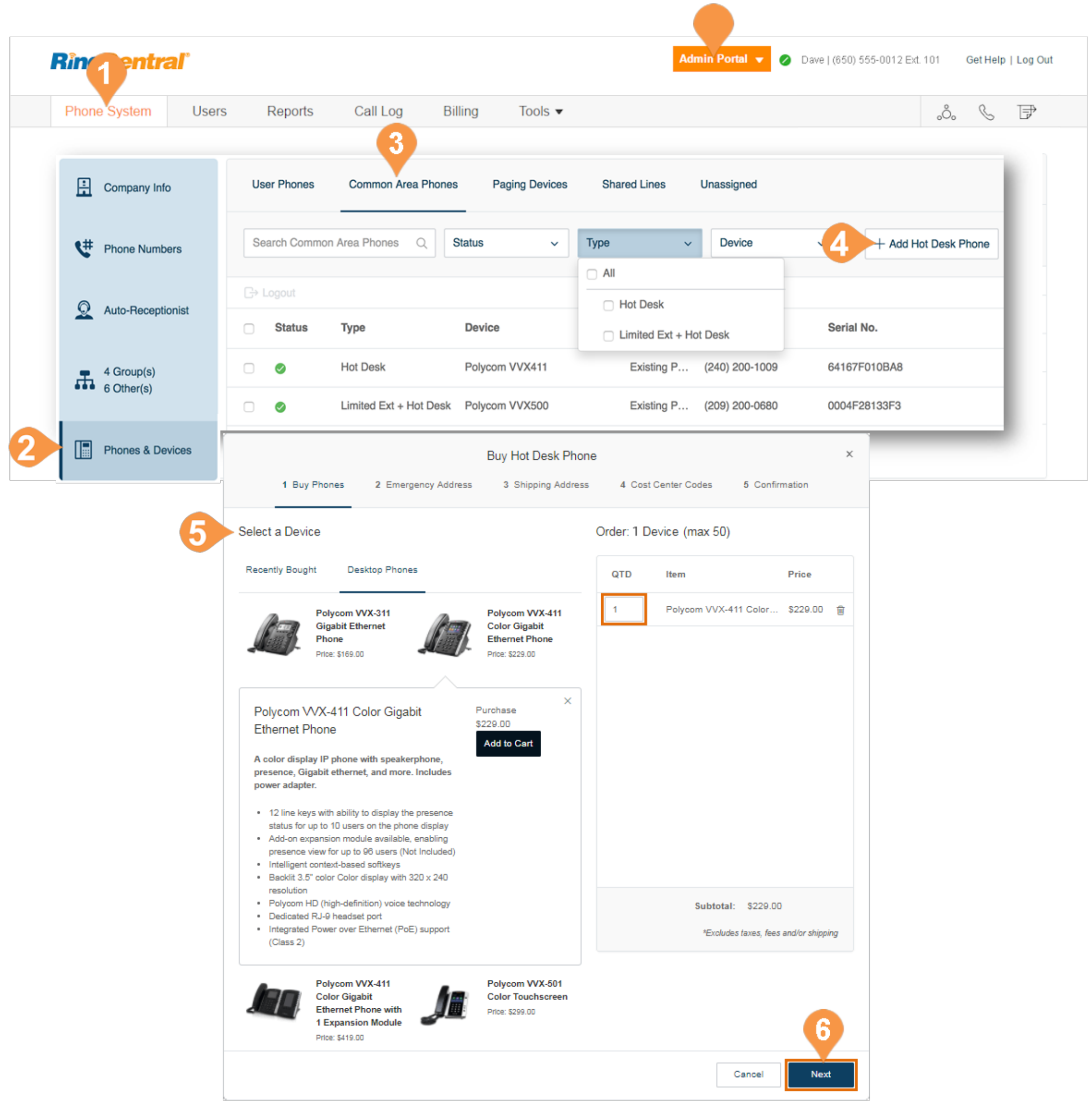


Add a Hot Desk Phone

A hot desk phone provides hot desking, and enables any employee to log in to a shared phone that adopts the user's phone settings. There are two types: hot desk phones and limited extensions that are enabled for hot desking.

For more information on managing hot desk phones, see "Managing Hot Desking" on page 144. For more information on managing limited extensions and on enabling a limited extension for hot desking, see "Limited Extensions" on page 129.

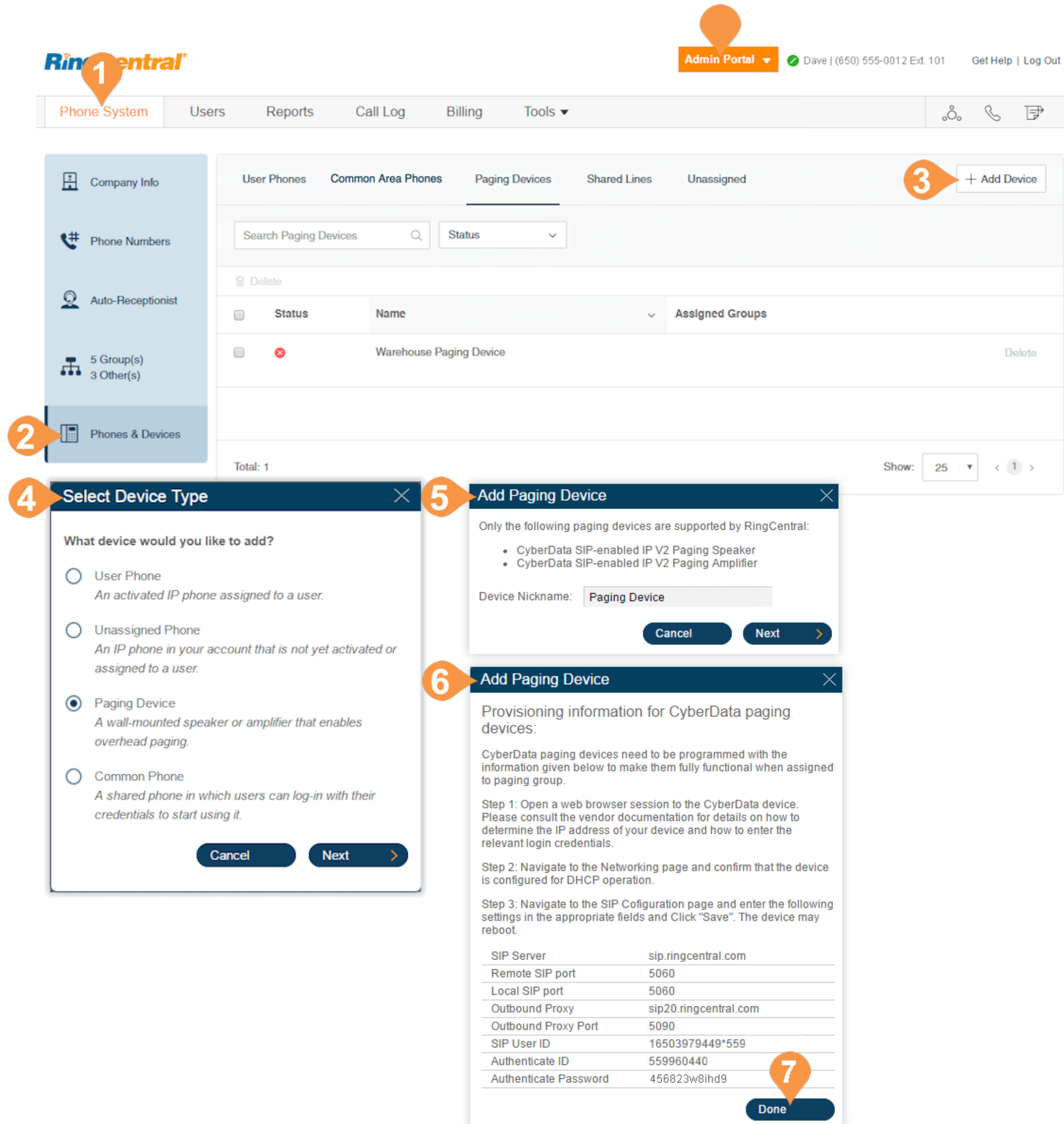
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Common Area Phones** tab.
4. Click **Add Hot Desk Phone**.
5. Click on the phone that you want to purchase, and then click **Add to Cart**.
6. Specify the number of phones that you want to order under **QTY**, and then click **Next**.
7. Register your **Emergency Address**.
8. Select your shipping preferences and click **Next**.
9. Confirm your order by checking the acknowledgment box and click **Next**.



Add a Paging Device

A paging device is a wall-mounted speaker or amplifier that enables overhead paging.

10. From the Admin **Portal**, select the **Phone System** tab.
11. Click **Phones & Devices**.
12. Click the **Paging Devices** tab.
13. Click **Add Device**.
14. Enter a name for the paging device.
15. Click **Next**.
16. View the provisioning information for the device.
17. Click **Done** to add the paging device to your system.



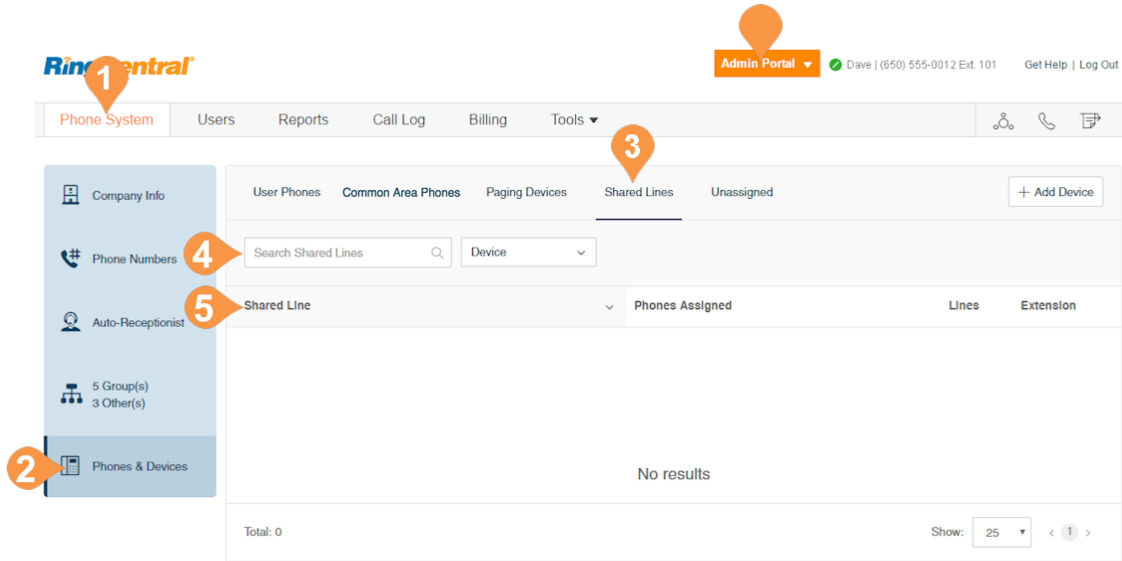
View Shared Lines

View a list of devices assigned to a particular shared line group.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click **Shared Lines**.

The group assigned to a particular **Shared Line** and the **Phones Assigned** to that shared line are listed.

4. Filter numbers by search term or device.
5. The **Shared Line** and **Phones Assigned** are shown here. If you have made any changes, click **Apply**.



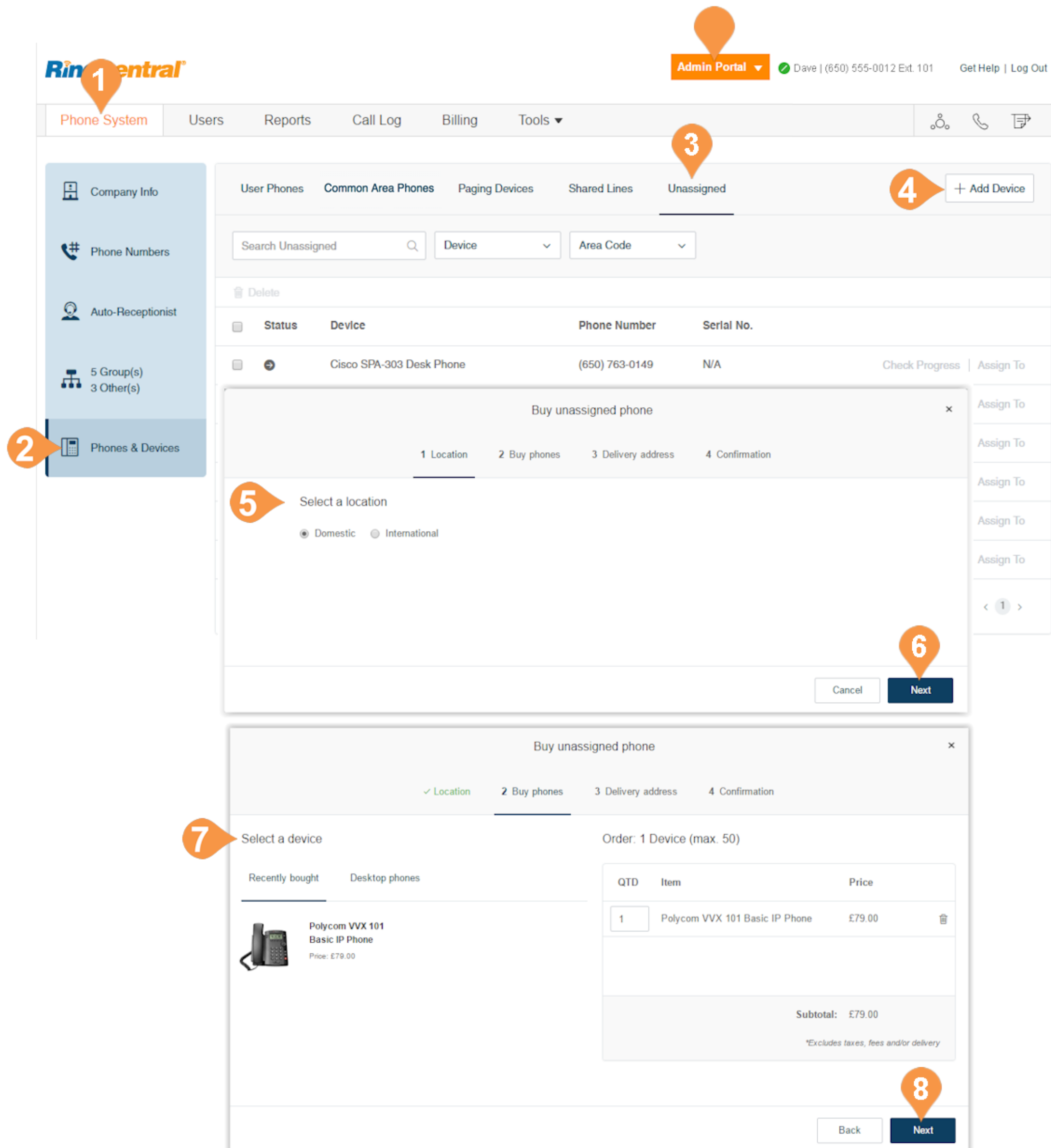
Add an Unassigned Phone

An unassigned phone is an IP phone in your account tha is not yet activated or assigned to a user.

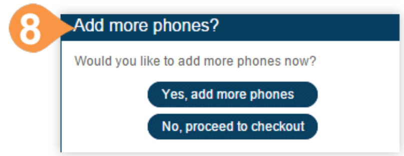
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click **Unassigned**.
4. Click **Add Device**.
5. Select the button next to **Unassigned Phone** and click **Next**.
6. Select **Domestic** or **International*** as the location for your new phone. If you'd like to add an International phone, select a country from the drop-down menu.
7. Select a phone to rent or buy.

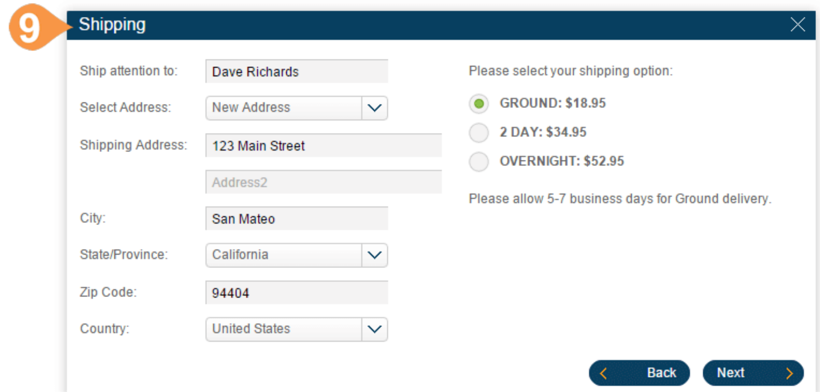
Instructions continue on the next page.

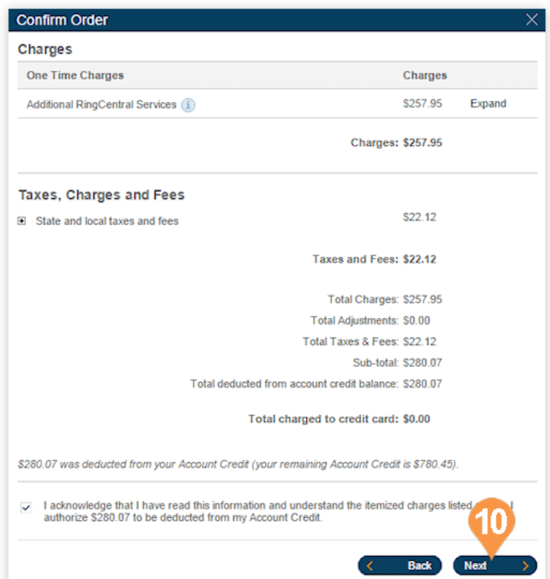
* You can only add devices for one country at time. Repeat the process for different countries as needed



8. Choose to add more phones or proceed to checkout.
9. Select your shipping preferences and click **Next**.
10. Confirm your order by checking the acknowledgment box and click **Next**.







Enabling Video Calls

You can enable video on internal point-to-point calls in your RingCentral Office account. Supported devices include the Polycom VVX 501/500 and 601/600 (supporting detachable cameras for video calling). Phones with video support include video codecs with audio for all outbound calls. No new firmware is required for the Polycom phones to enable video.

This feature is available as a on-demand feature for Premium and Ultimate tiers. Contact support to ask about this feature.

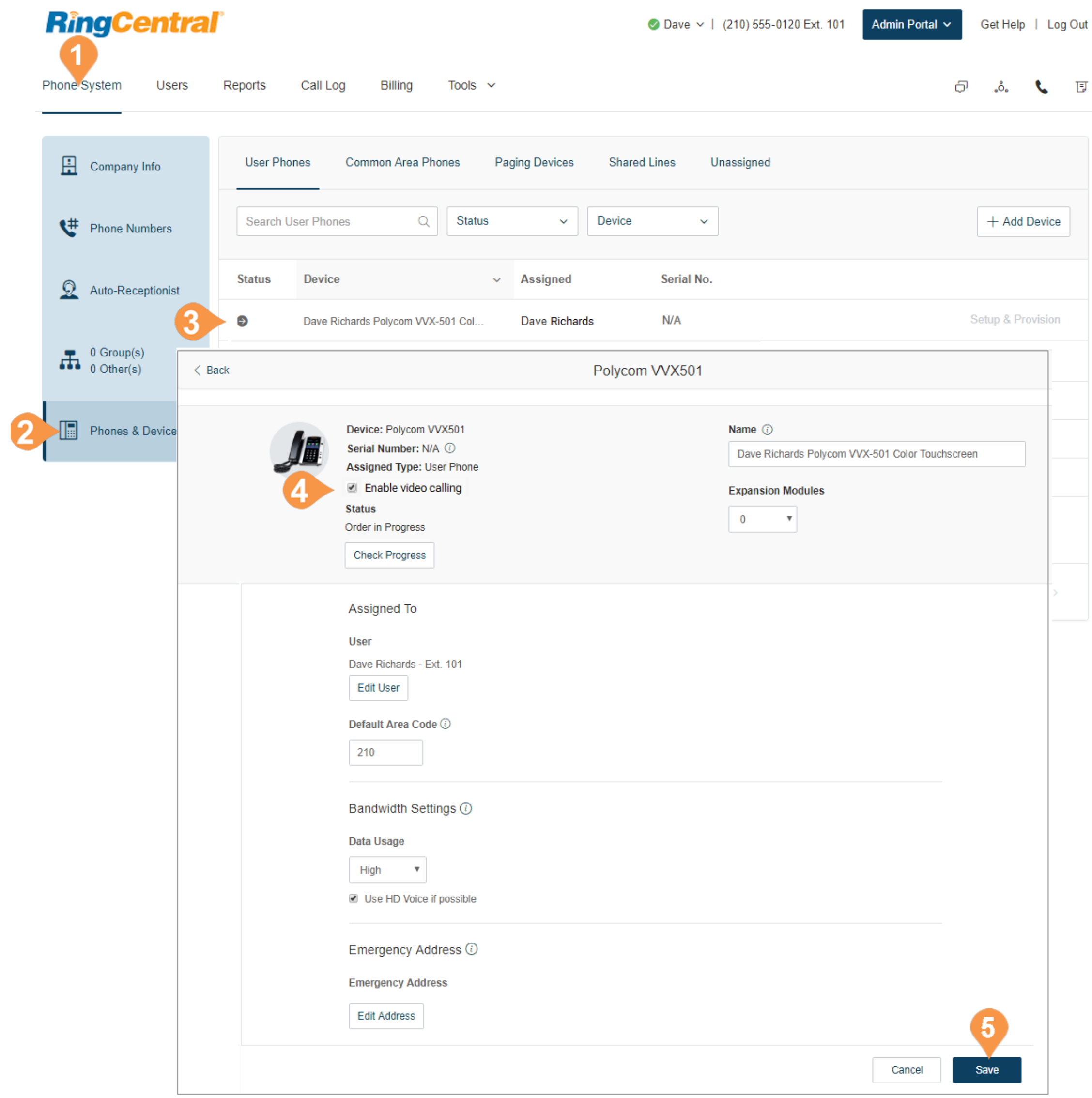
To enable video:

1. From the **Admin Portal**, select the **Settings** tab.
2. Click **Phones & Devices**.
3. Under **User Phones**, select a supported phone.
4. Check the box next to **Enable Video Calling**.
5. Click **Save**.

Note: you can enable video calling for multiple devices by multi-selecting the Polycom devices in the list and enabling video calling in bulk.

The phone will be resynchronized to make and receive video calls with similarly configured devices within your RingCentral Office account.

For information about placing video calls, see the RingCentral Office User Guide.



Hot Desking

Managing Hot Desking

Hot desking* enables any employee to log in to a hot desk phone that adopts the user's phone settings. Employees who travel from different offices can share the same hot desk phone and desk while keeping their own extension profiles and voicemail access.

Types of Hot Desk Phones

The following configurations of hot desk phones that support access to hot desking are available to support your business needs:

- **Hot Desk (Common) Phone**: An employee visiting from a different office can log in to a hot desk phone and use it as their own, accessing their own extensions, profiles, voicemail, and other phone features. Hot desk phones do not provide any telephony support unless the guest user activates them by entering their credentials (except for making emergency calls).
- **Hot Desking for Limited Extension**: Limited extensions are installed in common areas (meeting rooms or in hotel rooms) for anyone who has the need to access basic inbound/outbound calling capabilities. With Hot Desking for Limited Extension, a visiting employee can log in to a limited extension phone and use it as their own with access to full telephony features. Hot desking enables field sales and remote employees to work in a variety of spaces when visiting different offices and the fact that this feature is available on limited extension phones ensures that the hardware still provides functional value for on-site employees in all other cases.

Phone Support and Setup

You can either purchase a new phone that supports Hot Desking, or convert an existing unassigned Polycom VVX phone to a hot desk phone. Supported phone models are the Polycom VVX 310, 311, 410, 411, 500, 501, and 601.

Using Hot Desking for Limited Extension

Calls are routed to a Hot Desking for Limited Extension phone as follows:

- Calls to the Guest User: the limited extension device is added to the forwarding rules of User Business Hours and After Hours (if it has forwarding rule). Calls are routed to Limited Extension device based on active answering rule of the guest user.
- Calls to Limited Extension are still routed to its device: Extension, DID, or DL number, and paging calls. However, calls to the phone number of the Limited Extension DL follow the guest answering rules.

After logging out through the logout soft key on the physical phone device, the phone resumes operation as a limited extension device.

Managing Hot Desking Devices

You can configure and manage hot desking devices from the **Phone and Devices** tab of your online account. See these sections:

- Add a Hot Desk Phone.
- Enabling a Limited Extension Phone for Hot Desking
- Convert an Unassigned Phone to a Hot Desk Phone.
- Unassign a Hot Desk Phone
- Log out a Hot Desk Phone
- Set the Hot Desking Session Timeout

*This option is available for Office Premium and Ultimate only.

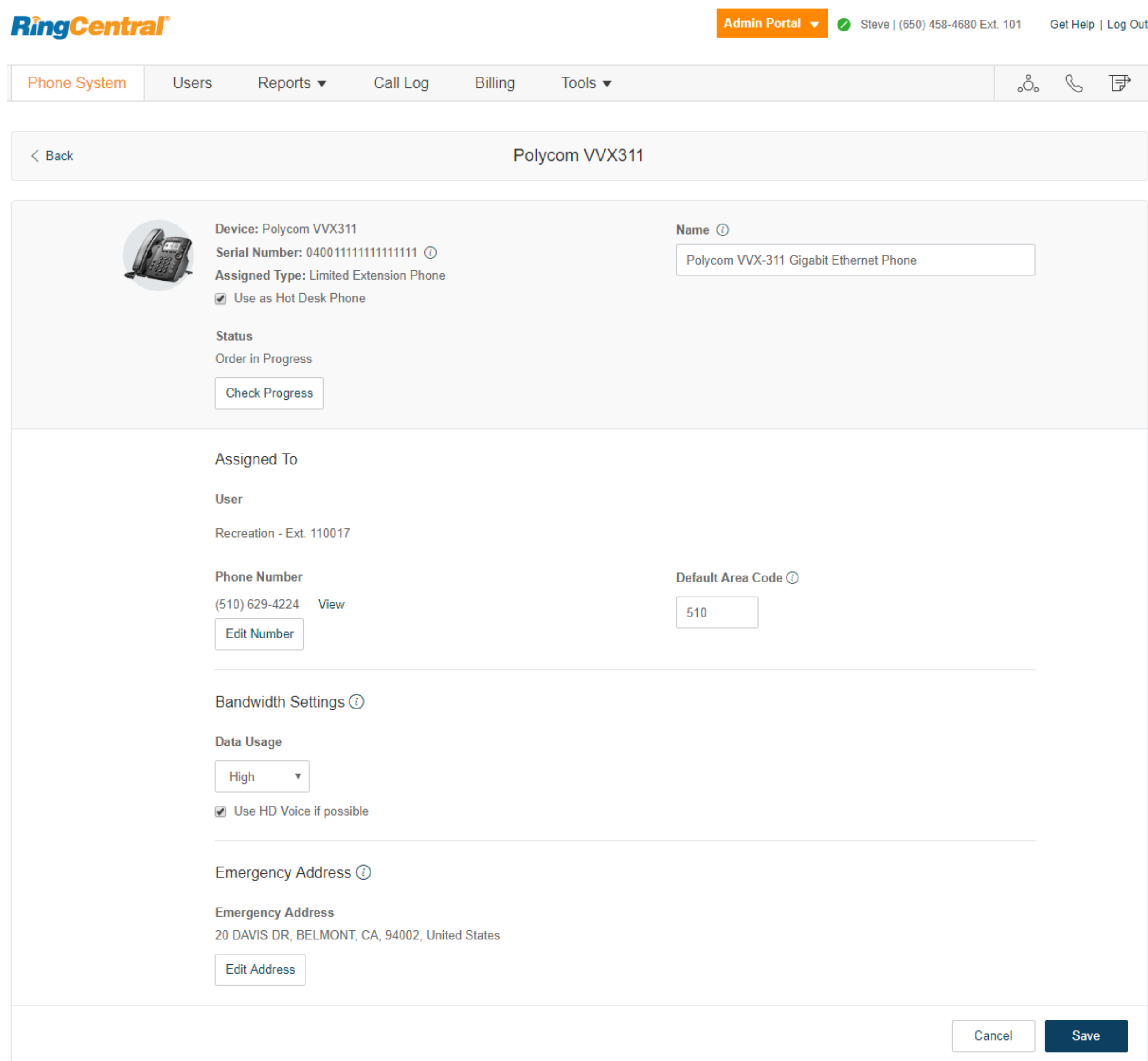
Enabling a Limited Extension Phone for Hot Desking

To enable a visiting employee to log in to a limited extension phone and use it as their own with access to full telephony features:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Common Area Phones** tab.
4. Select a **Limited Extension** to view the device details.
5. Click the **Use as Hot Desk Phone** box.
6. Click **Save**.

Note: On the **Phones & Devices** page, the device type is now identified as **Limited Ext + Hot Desk**.

A login softkey is provisioned on the device. Once a guest user is logged in, the device details page displays the guest user name.

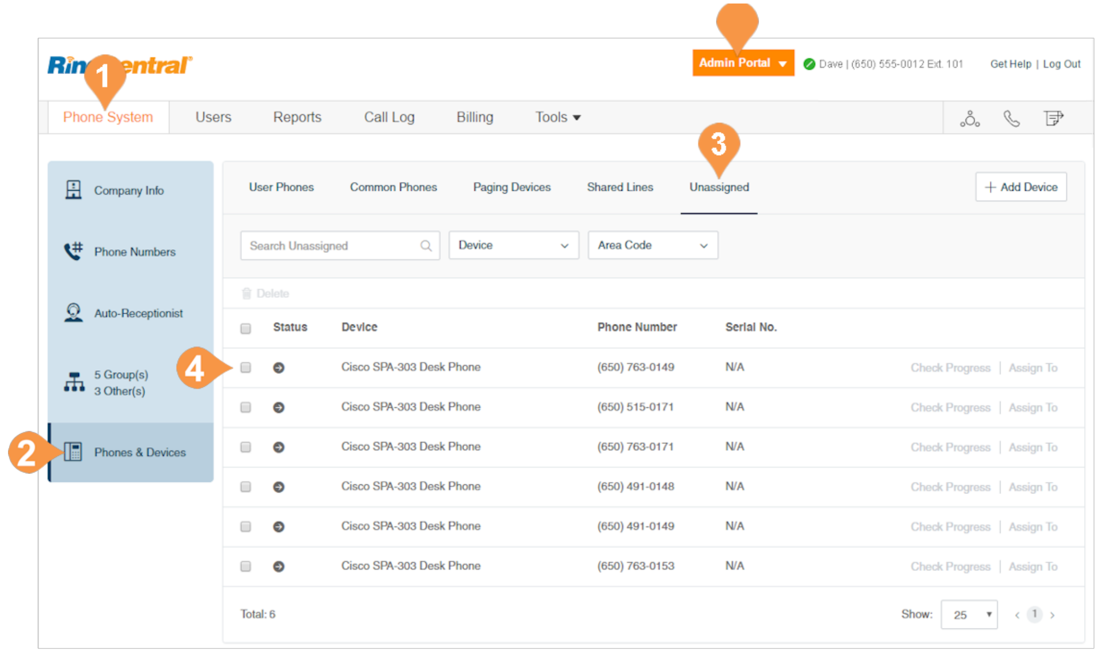


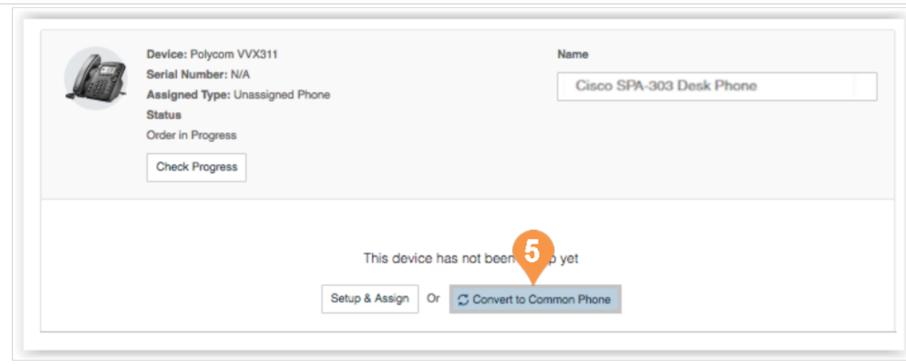
Convert an Unassigned Phone to a Hot Desk Phone

Converting an unassigned phone to a hot desk phone makes that phone only available for use in hot desking. No minutes are included for any type of calls.

To convert an unassigned phone to a hot desk phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Unassigned** tab.Select an unassigned phone.
4. Under Phone Details, select **Convert to Common Phone**.
5. Follow the instructions to complete the conversion.





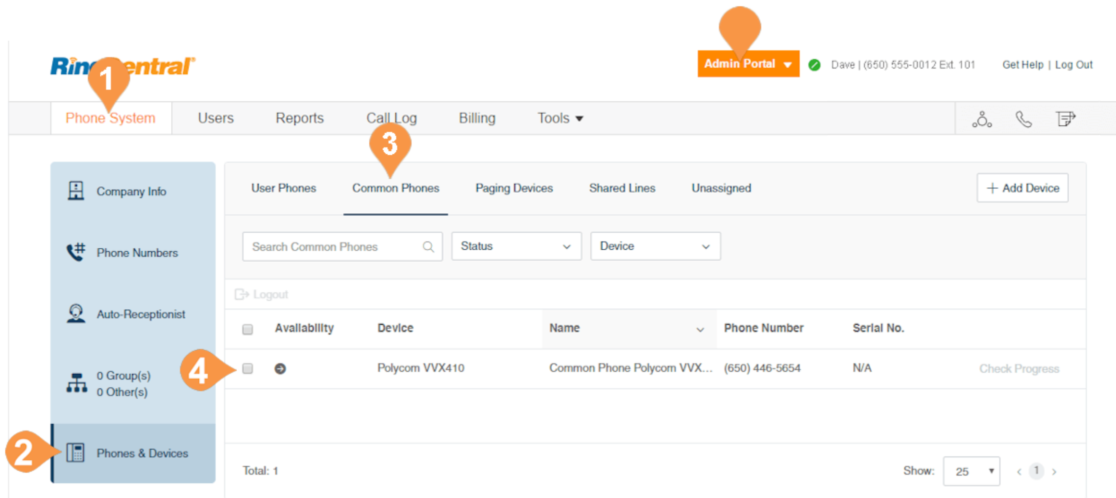
Unassign a Hot Desk Phone

You can unassign a hot desk phone to remove it from hot desking use, and return it to the list of unassigned devices.

To unassign a hot desk phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Common Area Phones** tab.
4. Select a hot desk phone.
5. Under Phone Details, select **Unassign Phone**.

The phone is returned to Unassigned phones.



Log out a Hot Desk Phone

You can log out the currently logged in user from the hot desk phone.

To log out a hot desk phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Common Area Phones** tab.
4. Select one or more hot desk phones.
5. Click **Logout**.

The currently logged in users are logged out from the selected phones.

Set the Hot Desking Session Timeout

The hot desking session timeout specifies the time period when guest users will be logged out from phone endpoints. The default session timeout is 12 hours.

No Timeout

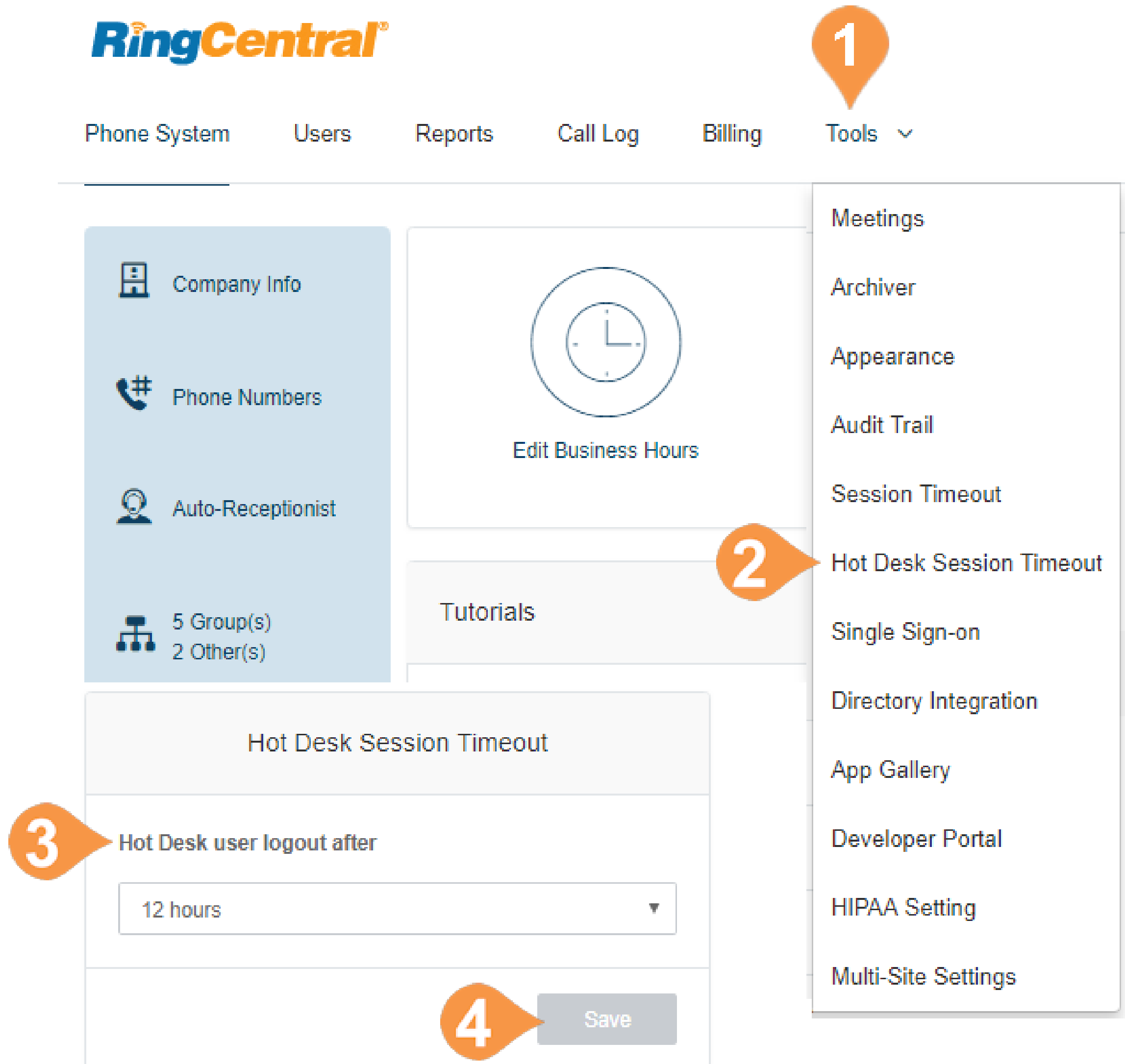
Certain enterprises with a mobile workforce may use the 'Never' value for the timeout to configure that all hot desk sessions in the account will not timeout. When using this option, the hot desk session can only be logged out by a user from the phone.

To set session time out for all hot desk phones on the system:

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Hot Desk Session Timeout**.
3. Set the session timeout from the menu.

   To configure no timeouts, select the **Never** value.

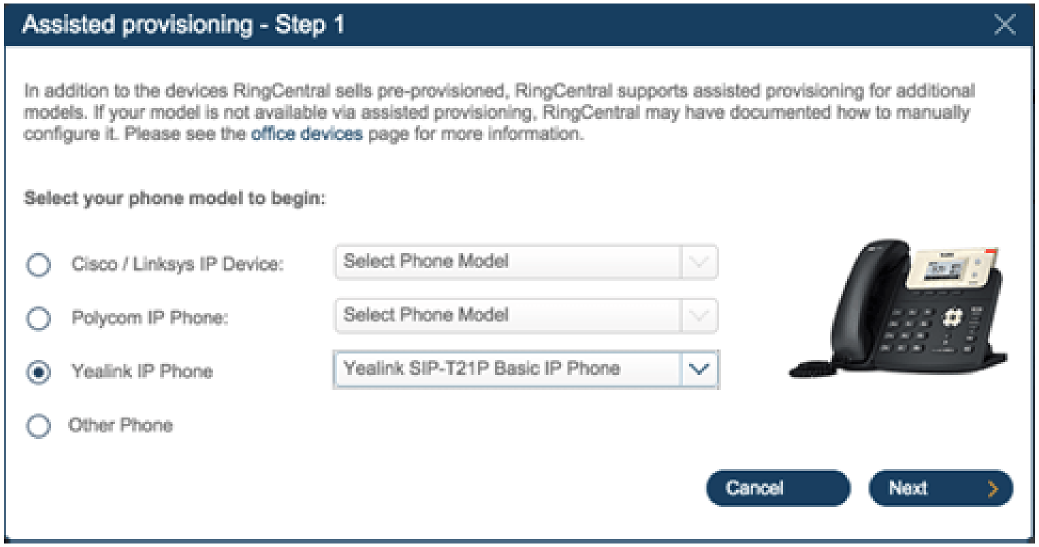
4. Click **Save**.



Assisted Provisioning

You can provision supported third-party devices with your service. To learn more about phone provisioning, click here.From the Admin Portal, select the **Phone System** tab.

5. Click **Phones & Devices**.
6. Select the device that needs to be provisioned.
7. Click **Setup and Provision**.
8. Select your phone model. If you have selected:
   a. **Cisco/Linksys IP Devices**: select the phone model from the menu and click **Next**. Proceed with the steps described in the wizard.
   b. **Polycom IP Phones**: select the phone model from the menu and click **Next**. Proceed with the steps described in the wizard.
   c. **Yealink IP Phone**: select the phone model from the menu and click Next. Proceed with the steps described in the wizard.
   d. **Other Phone**: click **Next**. The next window displays the SIP Configuration or information needed for manual provisioning. Contact your manufacturer to know how to configure your phone using these configurations.



User Management

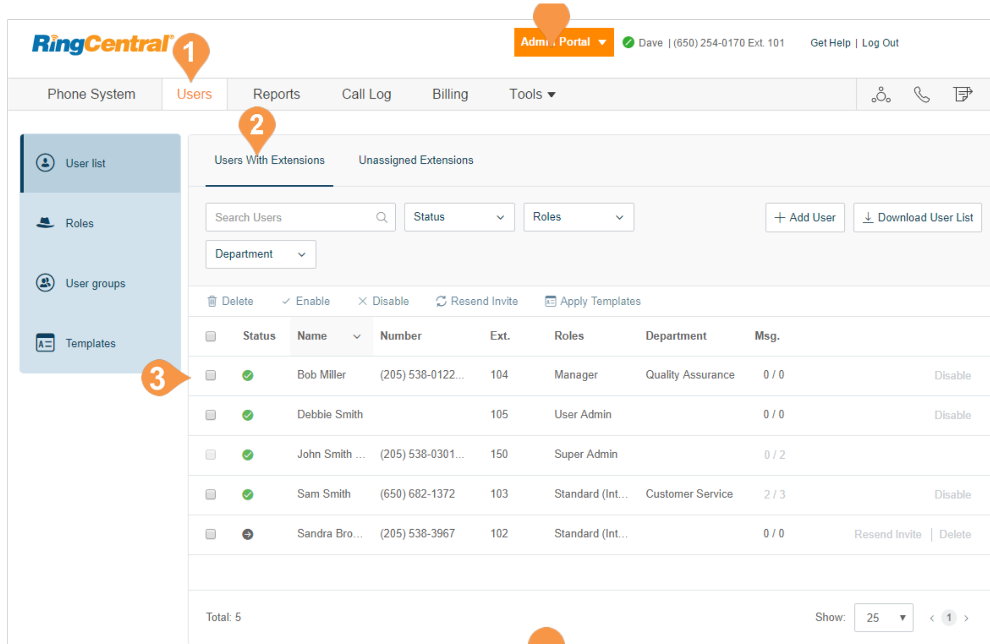
User Management

This section describes user settings actions that only admins can perform.

View Users with Extensions

View your users and their extension information as well as any unassigned extensions on your account:

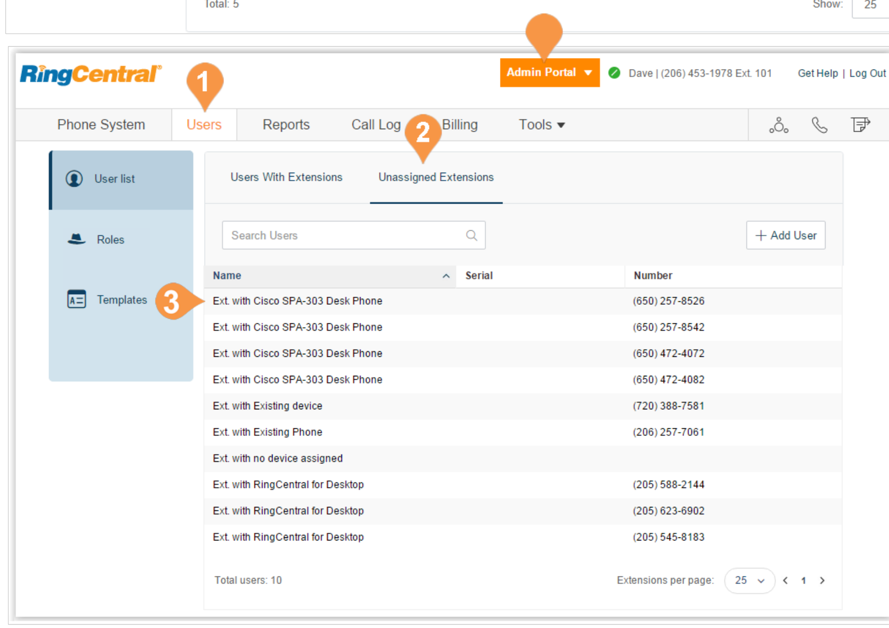
1. From the **Admin Portal**, select the **Users** tab.
2. Click **Users with Extensions** to view the users on your account.
3. Select a user.
4. View or edit the settings for the selected user. See the [RingCentral Office User Guide](#) for more information about user settings.



View Unassigned Extensions

View unassigned extensions, assign an extension to a user, or delete an unused extension.

1. From the **Admin Portal**, select the **Users** tab.
2. Click **Unassigned Extensions** to view the unassigned extensions on your account.
3. Select an extension.
   a. Enter information about the user that the extension will be assigned to. Click **Save and Enable** to add the user to your phone system.
   b. Click **Delete** to delete the extension.

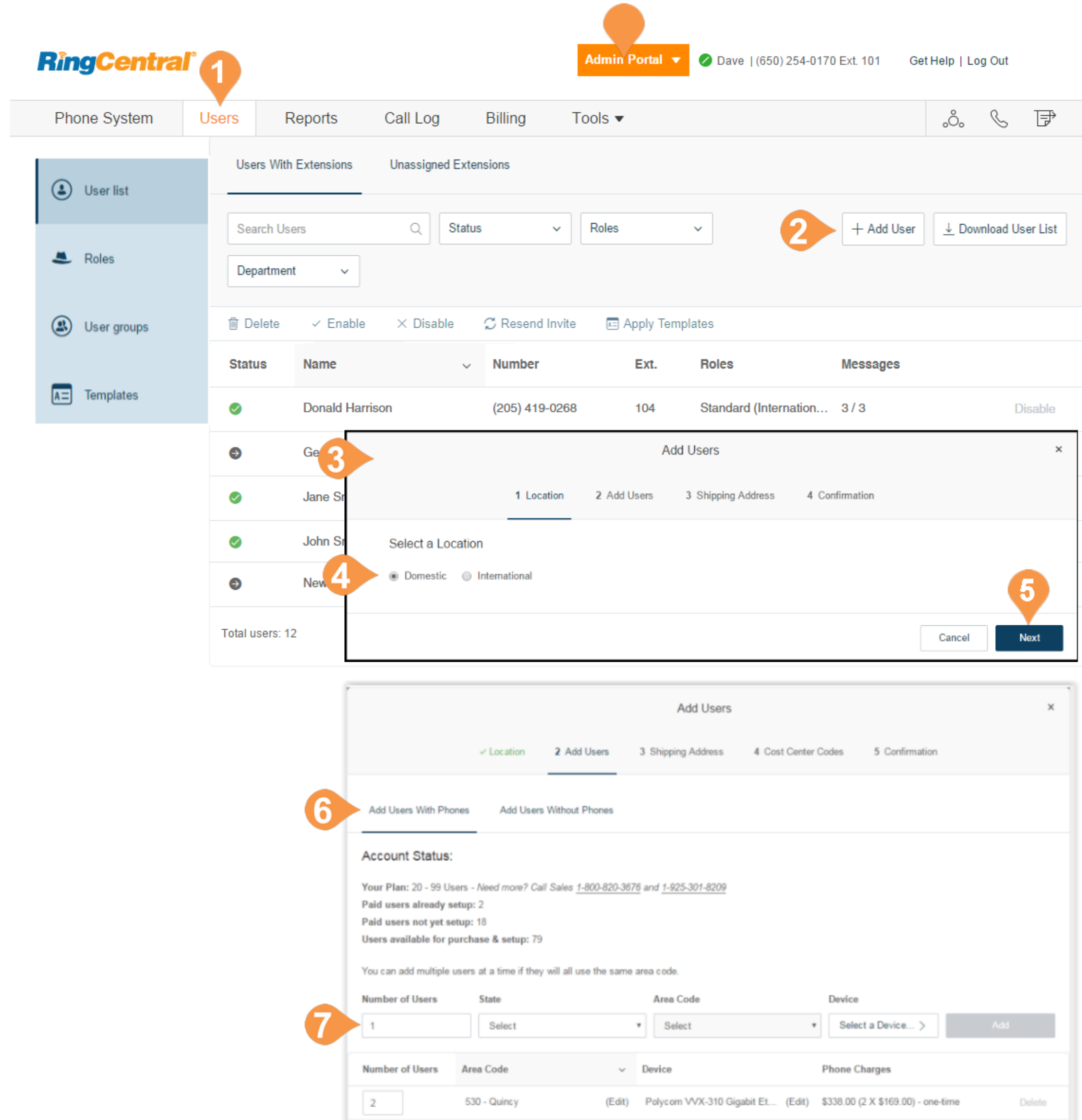


The user interface shown is for accounts with two or more users. Accounts with one user will see a different interface.

Add Users with Phone Devices

To add users with phone devices:

1. From the **Admin Portal**, select the **Users** tab.
2. Click the **Add User** (+) icon.
3. A pop-up window will appear with steps for adding your extension.
4. Select **Domestic** or **International** as the location for your new user. If you'd like to add an International phone number, select a country from the drop-down menu.
5. Click **Next**.
6. Select **Add Users with Phones**.
7. Choose the number of users you'd like to add, the phone numbers you'd like to add for them, and the phones you'd like to add.
8. Follow the prompts for your shipping address and billing information then review and submit your order.

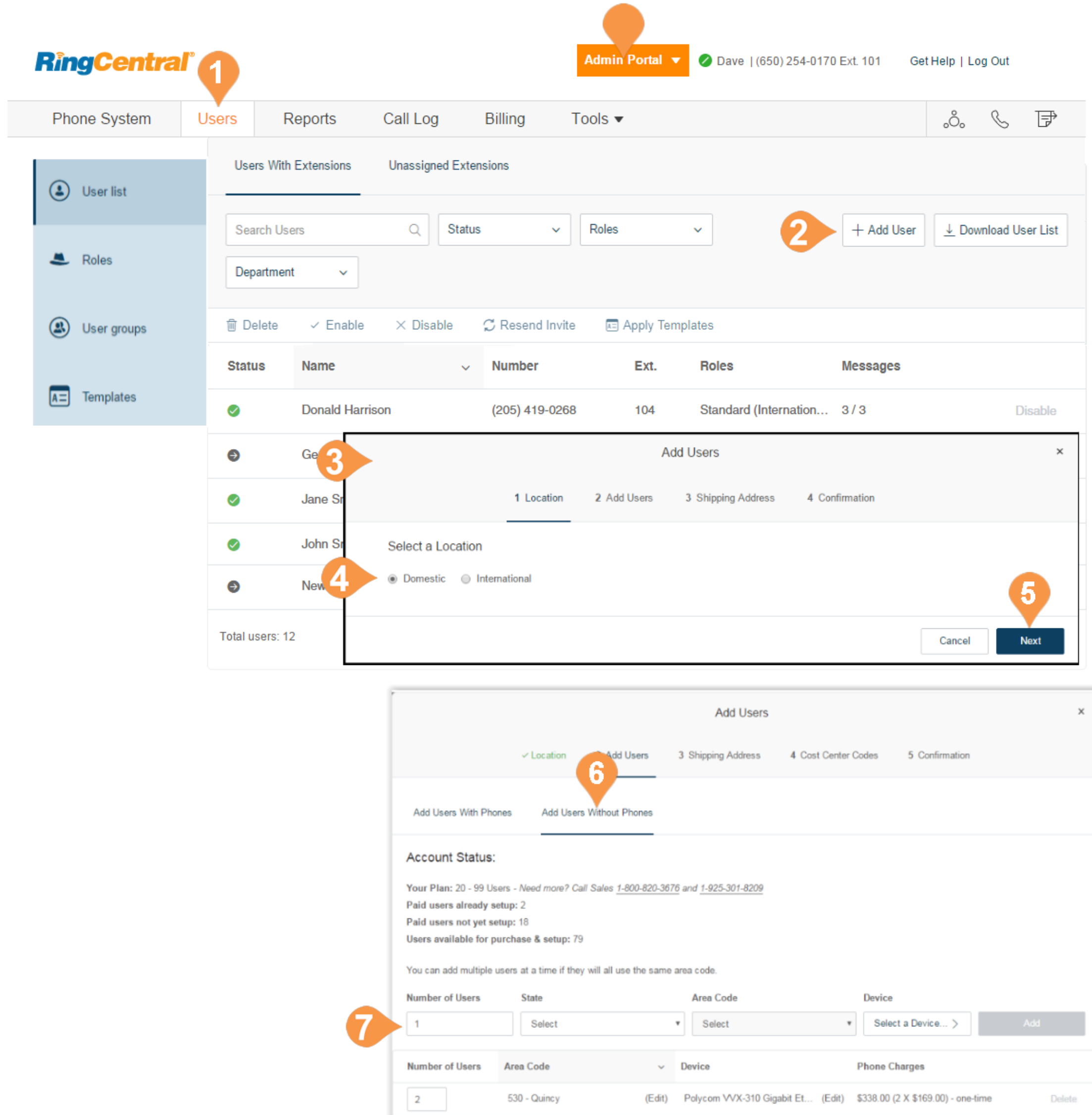


Add Users without Phones

To add users without a phone assigned:

1. From the **Admin Portal**, select the **Users** tab.
2. Click the **Add User** (+) icon.
3. A pop-up window will appear with steps for adding your extension.
4. Select **Domestic** or **International** as the location for your new user. If you'd like to add an International phone number, select a country from the drop-down menu.
5. Click **Next**.
6. Select **Add Users without Phones**.
7. Choose the number of users you'd like to add and the phone numbers you'd like to add for them.
8. Follow the prompts for your shipping address and billing information then review and submit your order.

Note: Users without phones can receive caller ID only on incoming calls, while users with phones can also receive called ID on outbound calls.



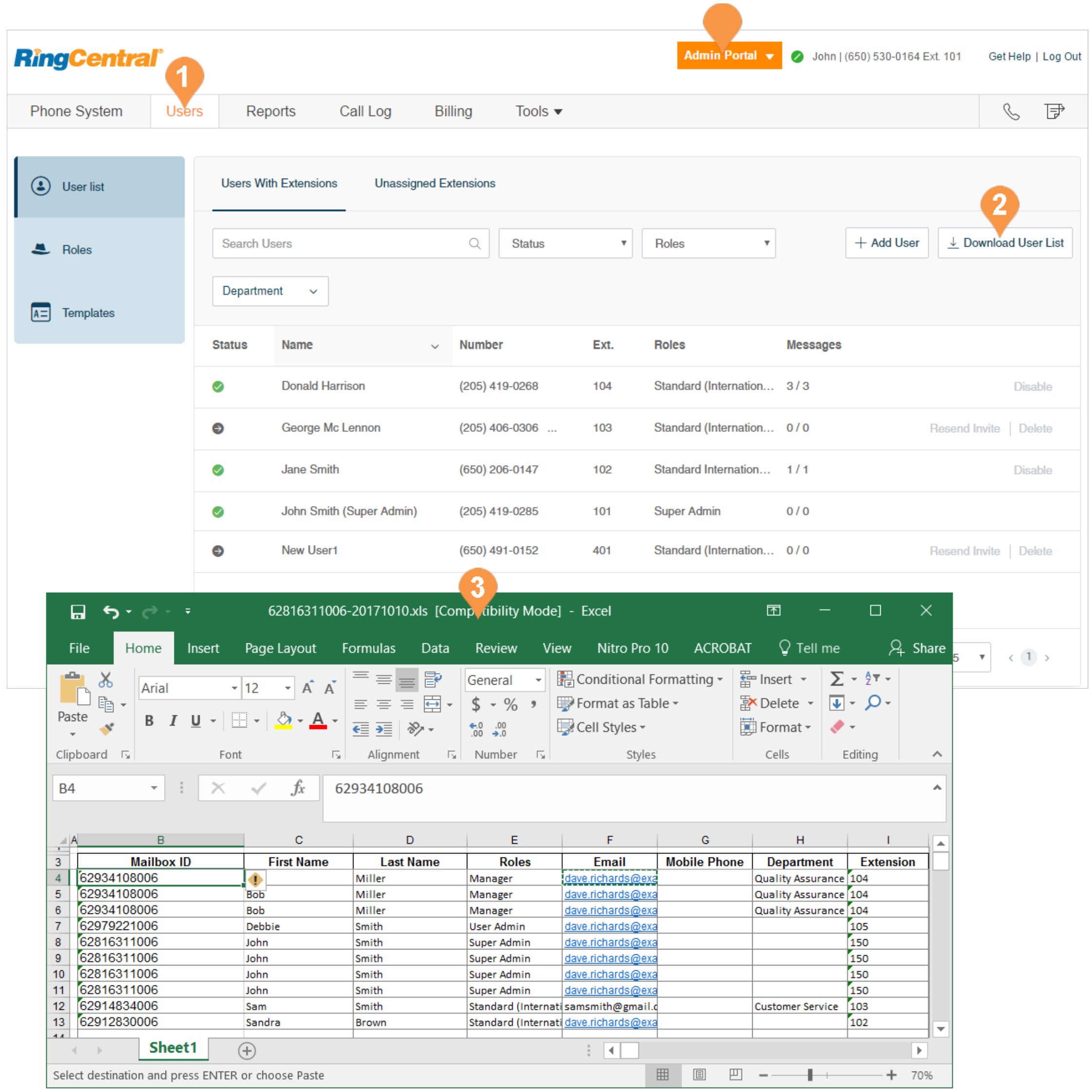
Manage Users and Extensions

In the Users List, you can manage users and extensions.

Export a User List

You can export a list of users and extensions in Microsoft Excel file format. You can use this feature to create a company directory or to perform an audit of users.

1. From the **Admin Portal**, select the **Users** tab.
2. To download a list of users and extensions for audit, click **Download User List**.
3. View the file in Microsoft Excel.



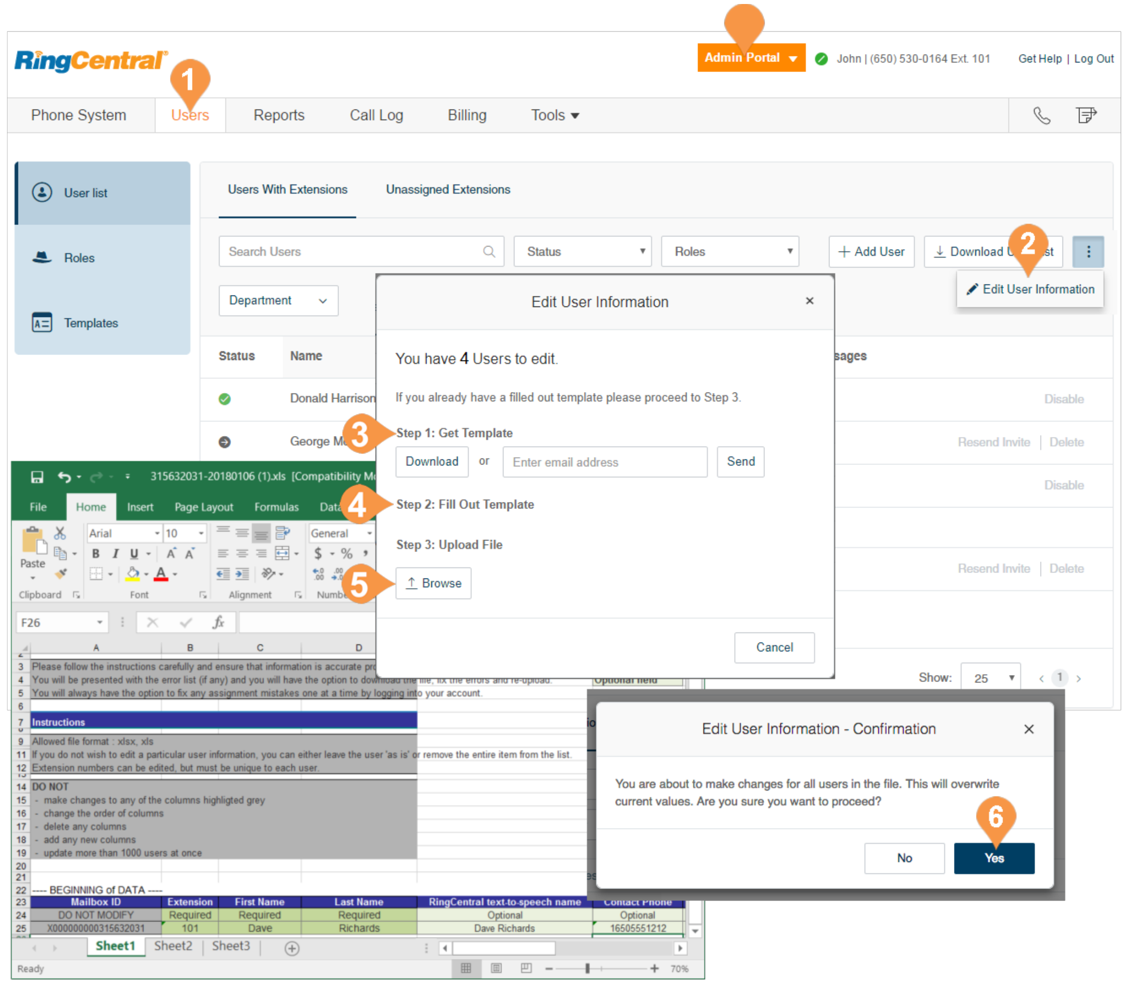
Bulk Edit User Information

You can efficiently make changes for multiple users in a single action. You export a template and add your user information into the template for import to RingCentral.

This feature is available for accounts with two or more users, and is not available to accounts that are using Active Directory.

To edit user information in bulk:

1. From the **Admin Portal**, select the **Users** tab.
2. Click **Edit User Information**.
3. Click **Download** or enter an email address and click **Send**.
4. Fill out the template with the user information.
5. Click **Browse** and upload the user file.
6. Confirm that you will overwrite all the user data.



Managing Active User Extensions

A virtual extension is a user extension without an assigned digital line. It becomes an Active User Extension if it makes/receives ten or more calls per month (billing cycle). For more information on managing usage of Active User Extensions, see Billing.

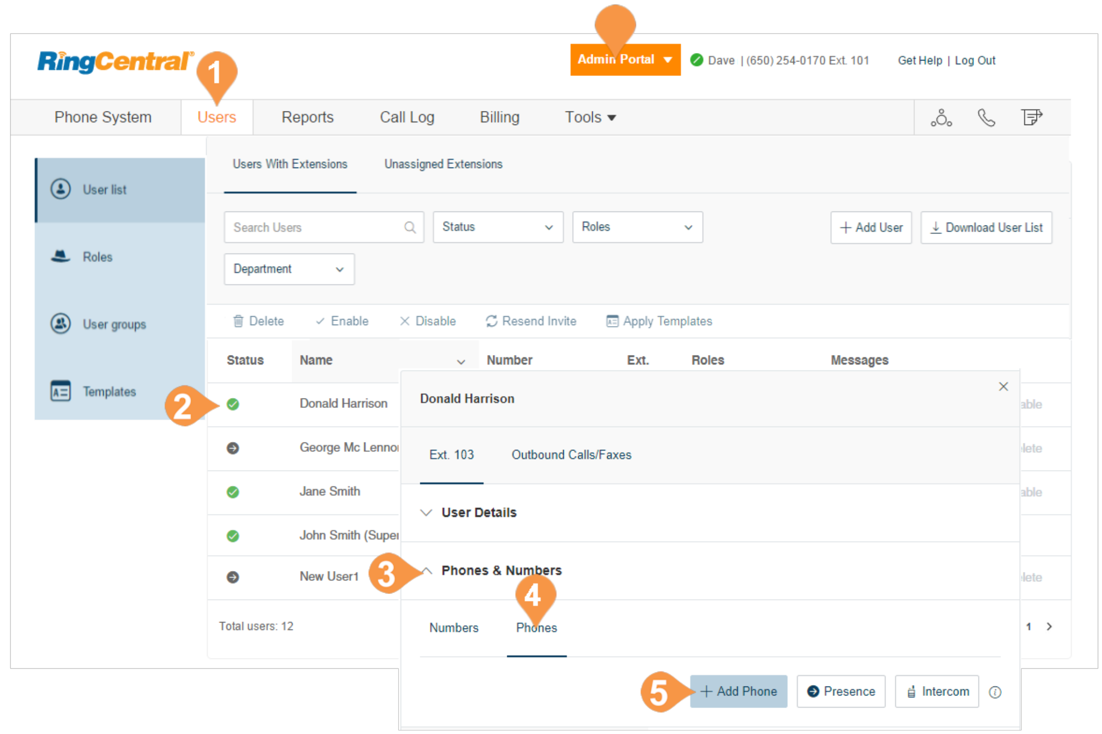
A virtual extension allows you to make limited outbound calls and provides access to many of the same features as a RingCentral digital line including the RingCentral Phone app, RingCentral Glip, RingCentral Meetings, integrations and more. By converting a virtual extension to a digital line, you can get full access to RingCentral Phone or a desk phone for a similar price as an active extension.

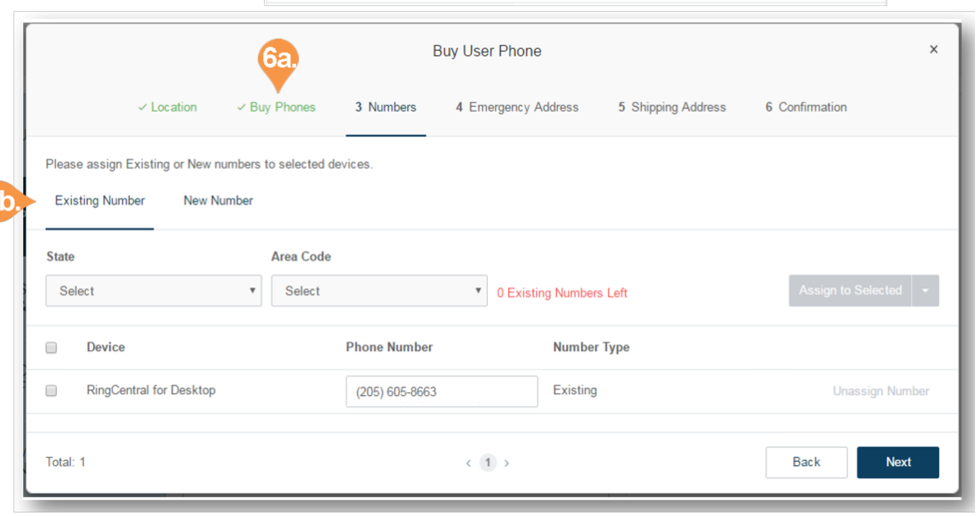
Convert a Virtual Extension to a Digital Line

To convert a virtual extension to a digital line:

1. From the **Admin Portal**, select the **Users** tab.
2. Select a user to convert with a direct inward dialing (DID) number but without a digital line.
3. Click **Phones & Numbers**.
4. Click Phones.
5. Click **Add Phone**.
6. In the **Buy User Phone** wizard:
   a. Select a phone for the user on the **Buy Phones** screen (this phone may be either a softphone or a physical phone).
   b. Click **Existing Number** on the **Select Number** screen. Select the DID (number) from the user you are trying to convert.
   c. Complete the wizard.

Note: on the checkout screen, you will see a charge for the digital line, and a credit for the DID. You will not see a credit for virtual extensions that are Active User Extensions, as those are post-billed.





Call Forwarding for an Unreachable Phone

Manage the rerouting of inbound calls when an Internet outage occurs. This feature is for situations where most installed phones are desktop phones and there is little-to-no access via mobile or soft phones. When triggered, the call will be handled by the forwarded extension's Call Handling & Message rules like voicemail. Once Internet service is restored, the incoming calls will automatically resume to ring the user endpoint phone as usual.

Feature Activation

- By default, Call Forwarding for Unreachable Phone is not available for configuration in your online account. Contact RingCentral Support to turn on this feature in your account.
- Once activated for your account, you must be an administrator to enable and configure Call Forwarding for Unreachable Phone.
- The feature is disabled when the **Notify my Desktop App** or **Smartphone** features are enabled.

Use Call Forwarding for Unreachable Phone with these extensions or groups:

- Individual user extensions that have desk phones and/or RingCentral Phone with a digital line.
- Virtual extensions with call forwarding to desk phones and/or RingCentral Desktop with a digital line.
- A Shared Line group

The feature is available in Call Handling for:

- Business Hours
- After Hours
- Advanced Rules

Call Forward destinations can only be one of the following:

- Another extension in the account
- An external public switched telephone network destination.

Guidelines for individual users:

- Mobile and RingCentral Desktop notifications must be turned OFF.
- The user must specify at least one (1) desk phone or digital line set in Call Handling.
- User must not have a public switched telephone network destination specified in Call Forwarding.
- If the user has multiple desk phones and RingCentral digital lines, all of them must be unreachable to trigger this call forwarding feature.
- If a virtual extension has forwarded to other user digital lines, then call forward is triggered only if all the forwarded endpoints are unreachable.

Note: When guidelines are not met, error messages may appear. If you encounter error messages, see this Knowledge Base article for solutions.

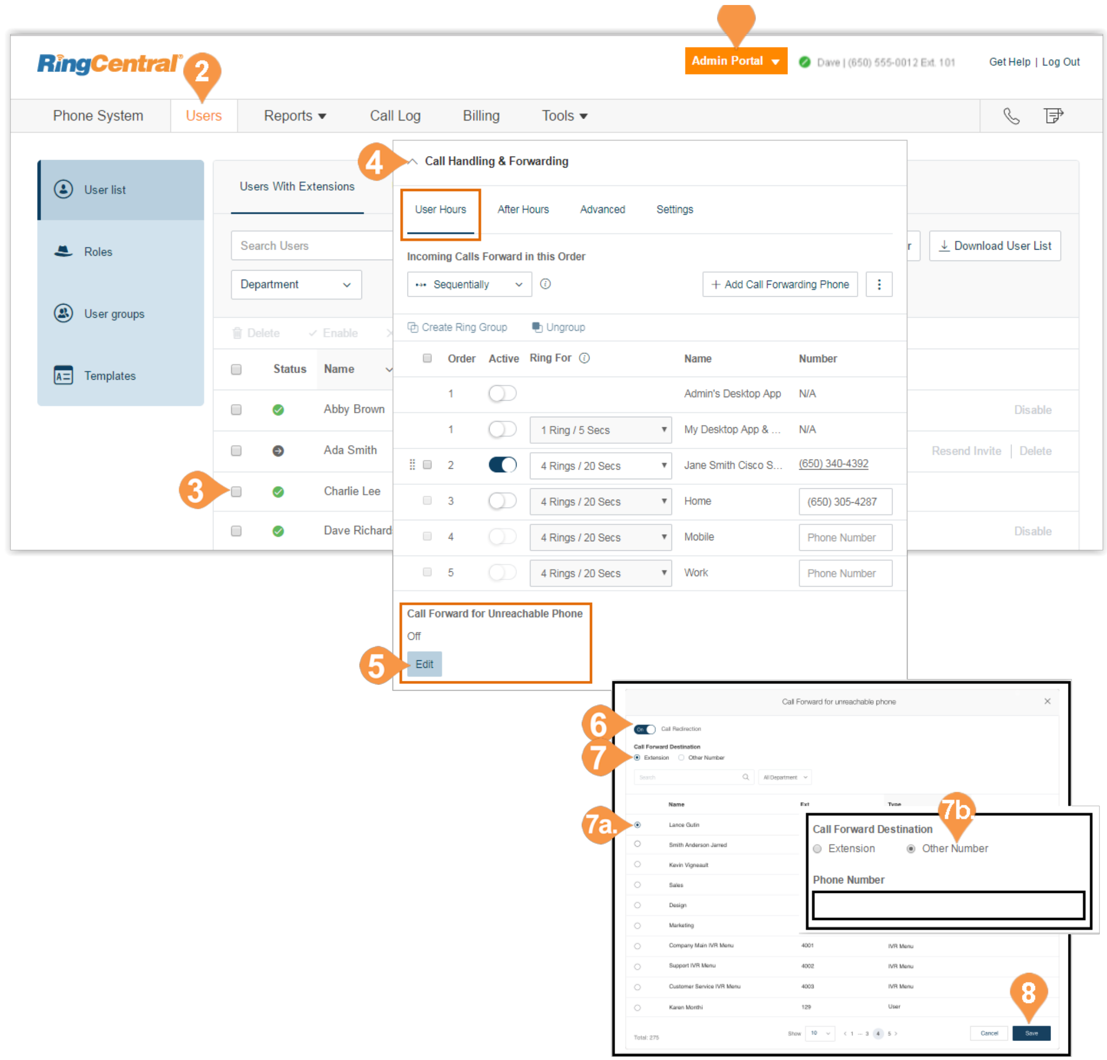
Configuring Call Forwarding for Unreachable Phone

You can configure Call Forwarding for Unreachable Phone through your online account.

1. Log in to your RingCentral online account.
2. From the **Admin Portal**, select the **Users** tab.
3. Select a particular **User**.
4. Click **Call Handling & Forwarding**.
5. Edit **Call Forward for Unreachable Phone.**

The Call Forward for Unreachable Phone pop-up appears.

6. Set the **Call Redirection** slider button to **On**.
7. Choose a Call Forward destination.
   a. **Extension**: for an Extension, click the button next to the **User** or **Extension** to which you want the call forwarded. You can also find the name of a User or Extension by entering the User name or Extension in the **Search** field and enter **All Departments**.
   b. **Other Number**: For an Other Number, enter the destination phone number in the Phone Number field.
8. Click **Save**.



User Settings

User Settings

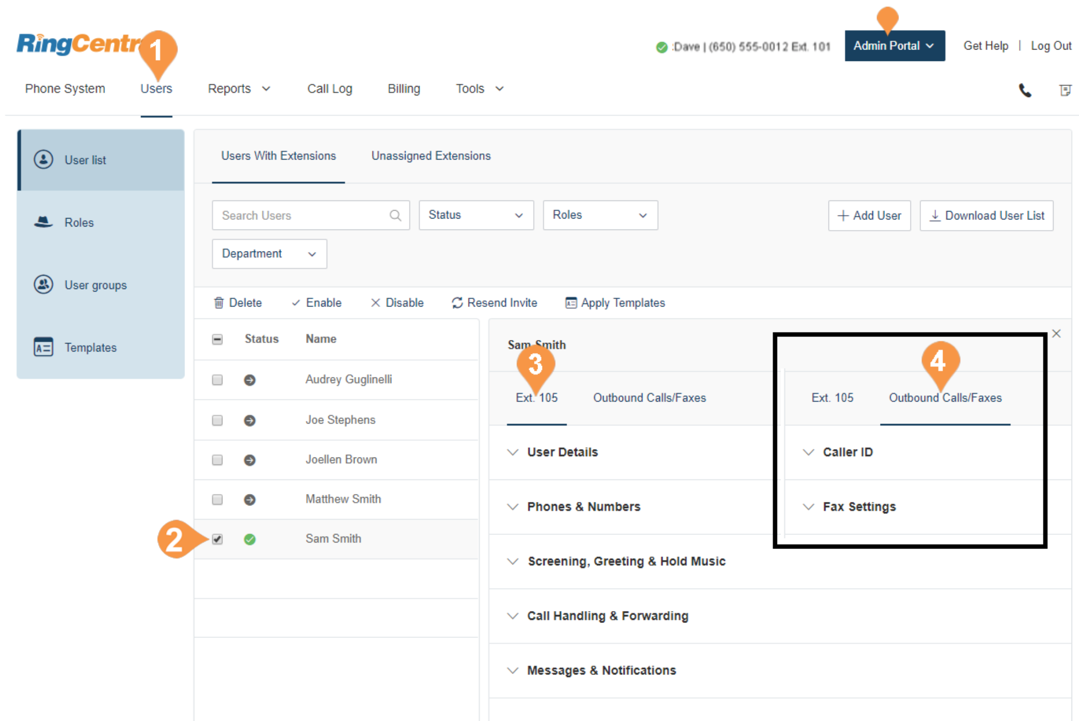
Admins can edit the following user settings:

- User Details
- Phones & Numbers
- Screening, Greeting & Hold Music
- Call Handling & Forwarding
- Messages & Notifications
- Outbound Caller ID
- Outbound Fax Settings

Learn more about each of these settings in the RingCentral Office User Guide.

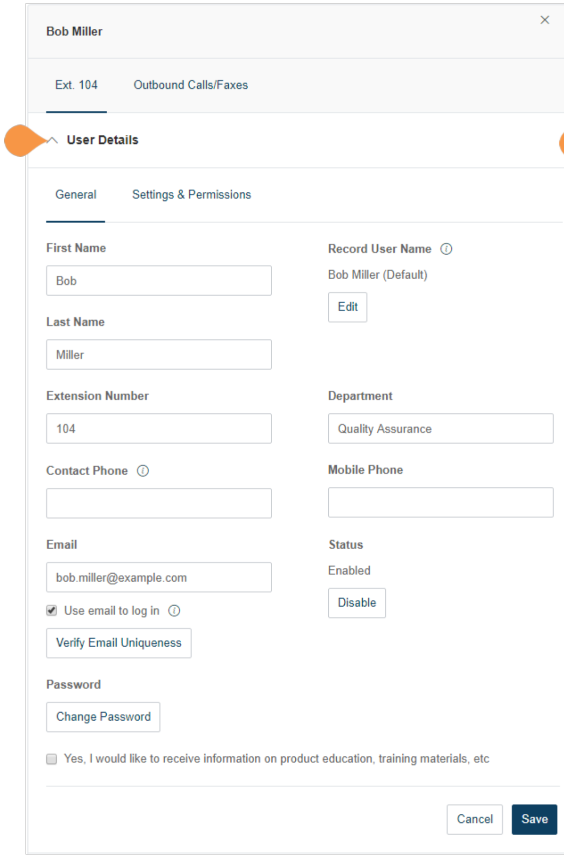
Administrators access and edit settings through the Users panel.

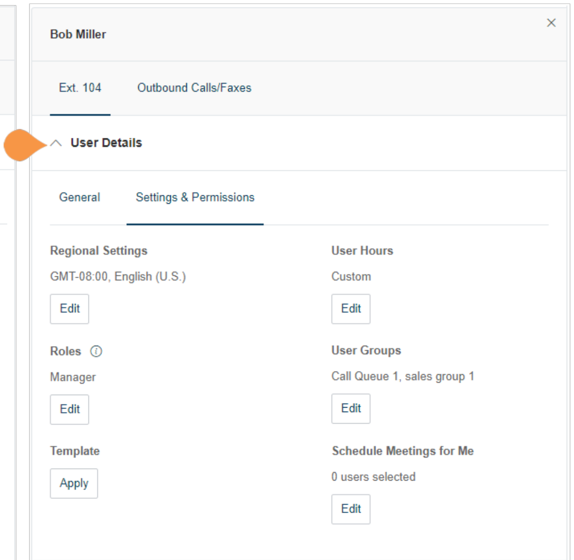
1. From the **Admin Portal**, select the **Users** tab.
2. Select a user.
3. On the user settings pane,
    - Select the extension, for example, Ext. 105, then the category to edit.
4. On the user settings pane,
    - Select Outbound Calls/Faxes, then the category to edit.



User Details

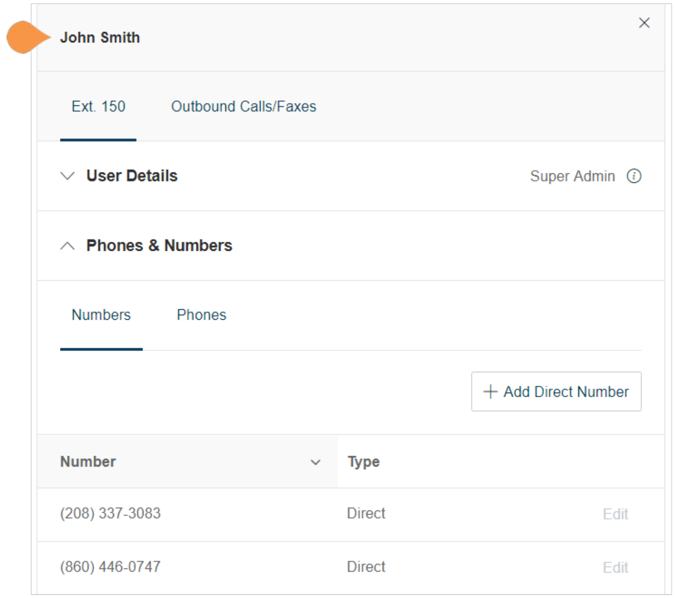
Click on **User Details** to view and edit the selected user's information. From this menu, you can edit the role assigned to a user, as well as a user's extension, name, recording, phone numbers, email address, department, hours, password, and regional settings.

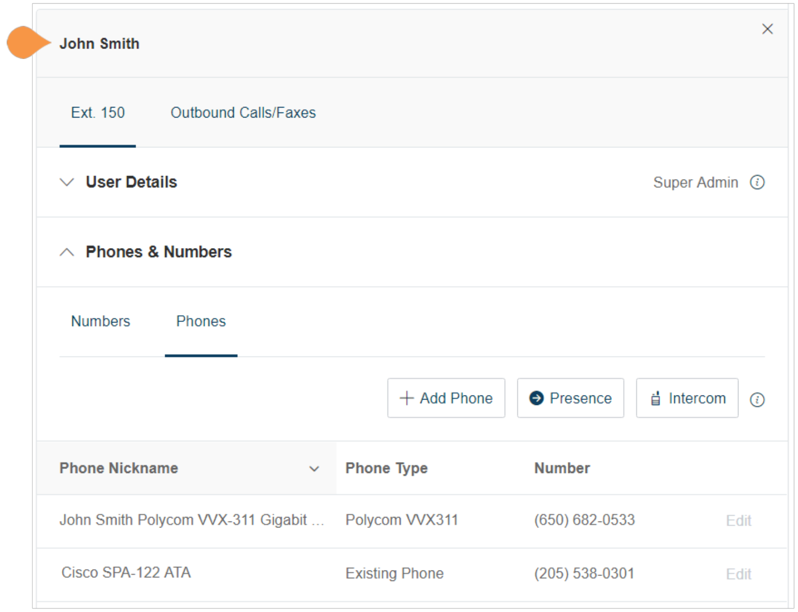




Phones & Numbers

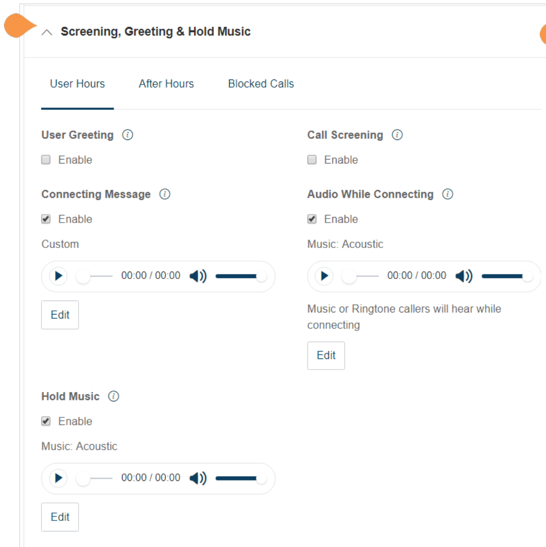
Click **Phones & Numbers** to view and edit the selected user's phone numbers and phone settings. You can add a direct number for this user, add a phone, download/activate apps, change presence and intercom settings, and view and edit conference settings.

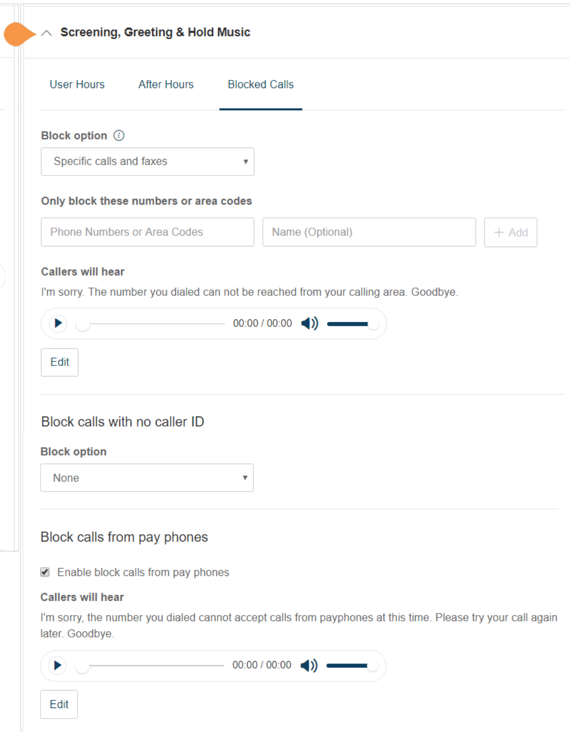




Screening, Greeting & Hold Music

Click **Screening, Greeting & Hold Music** to view and edit the selected user's greeting, call screening options, connecting message, audio while connecting, hold music, and blocked call settings.



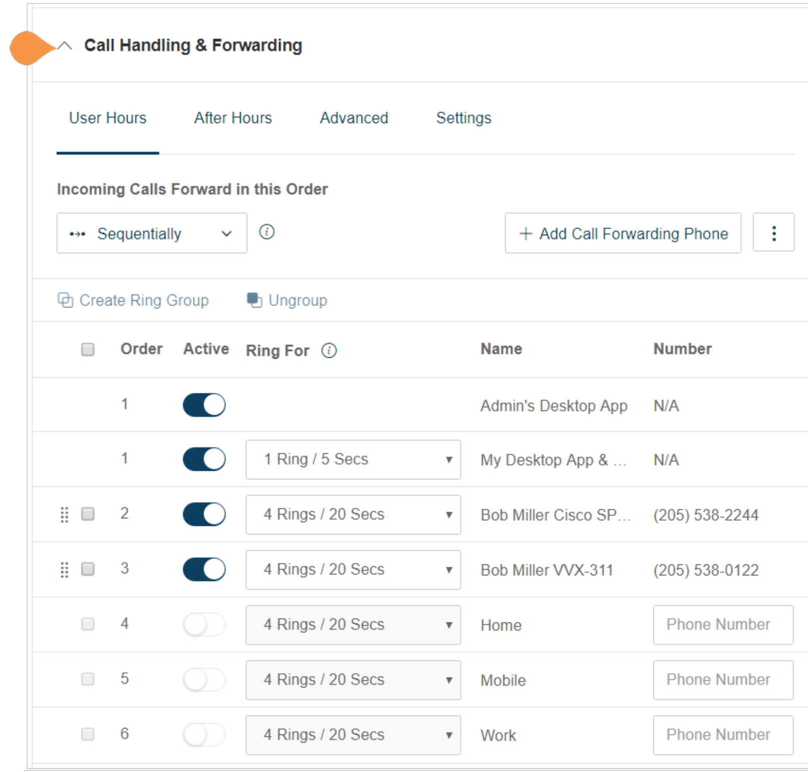


Call Handling & Forwarding

Click **Call Handling & Forwarding** to view and edit the selected user's call handling, call forwarding, ring group, additional phones, ring pattern, incoming call, and call flip settings.Setting Call Forwarding on the Phone Hardware

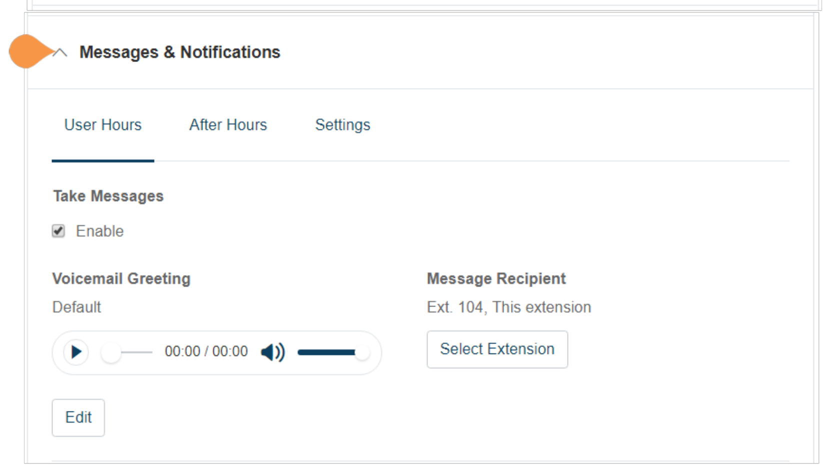
You can enable and disable call forward options on some equipment, such as Polycom® VVX® phones. The ability to ability to enable call forwarding on the phone hardware must be enabled in your account. Some limitations apply:

- If the call forward is configured on the phone hardware, the forwarding will not be indicated in the RingCentral system.
- The **Call Forward on Busy** menu option is not supported.
- The Call Forward selection on the phone setup between multiple devices is restricted to run only three times.
- A 911 call back, if received on the user's phone with Call Forward enabled is forwarded to the destination.



Messages and Notifications

Click **Messages & Notifications** to view and edit the selected user's voicemail settings, voicemail greeting, message recipient, messages, and notification settings.

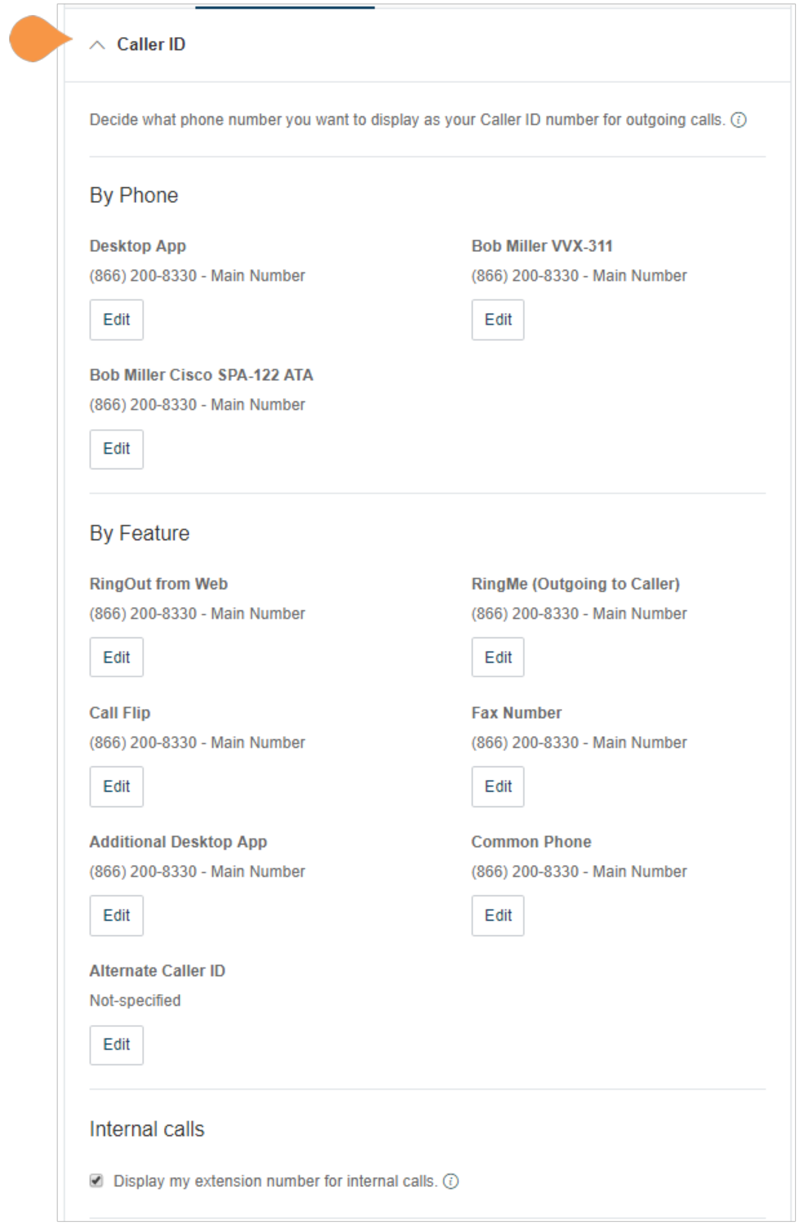


Outbound Calls/Faxes

In the user settings pane, click the **Outbound Calls/ Faxes** tab to configure settings for caller ID and fax.

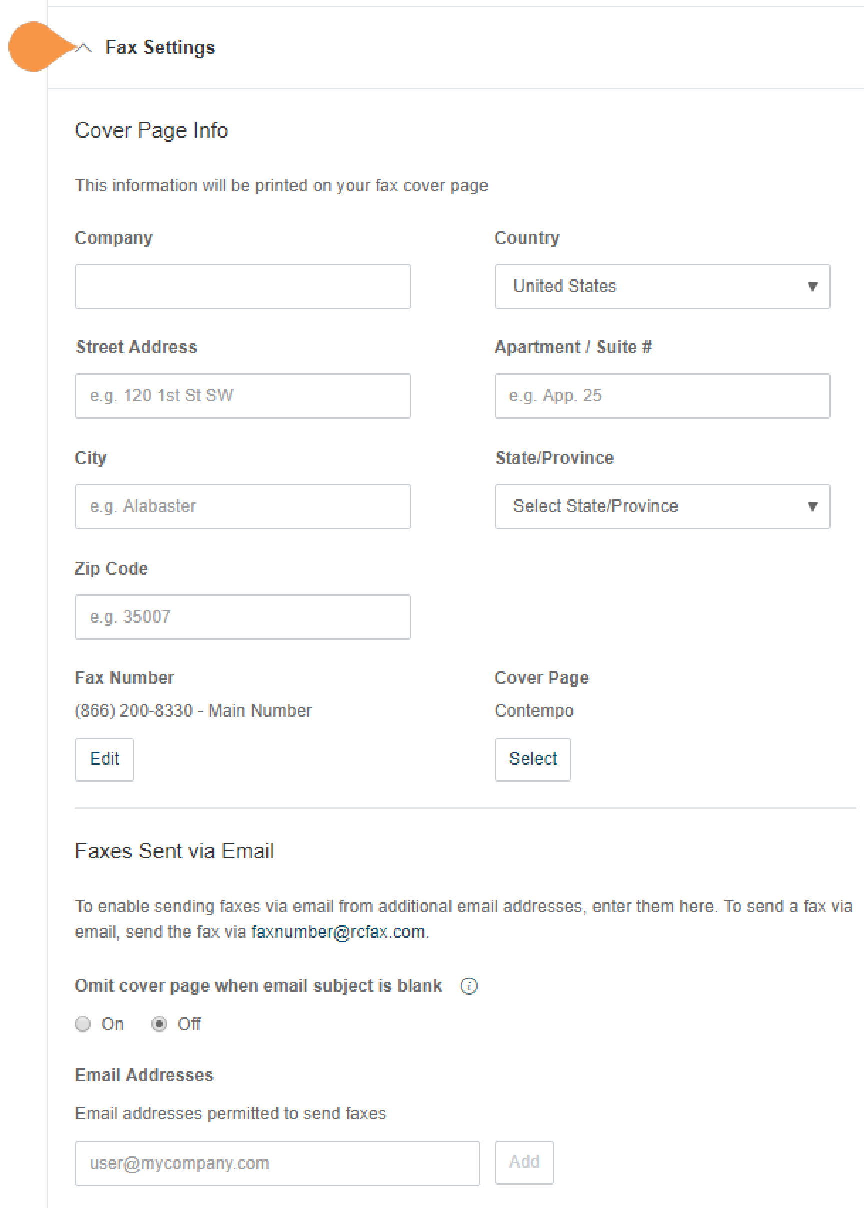
Outbound Caller ID

Click **Caller ID** to view and edit the selected user's outbound caller ID numbers.



Outbound Fax Settings

Click **Fax Settings** to view and edit the selected user's fax cover page settings and fax via email settings.



Roles and Permissions

Manage Roles and Permissions

Roles and permissions enforce your company security policy by providing a flexible, role-based access to your RingCentral phone system. You can delegate access to certain areas without giving full admin access, or by retaining control over certain areas. You can use templates and bulk upload options to efficiently apply roles among users across an organization.

Predefined Roles

You can grant access privileges by assigning users one of the seven predefined roles:

- **Super Admin**: Complete system administrator level access
- **Phone System Admin**: Phone System settings access plus full access to user level settings
- **Billing Admin**: Full access to billing functions, user level settings, international dialing, plus analytics features
- **User Admin**: Full access to user administration (self and others), international dialing, and system features/apps
- **Manager**: Provide users with all capabilities of Standard (International) along with access to key functions such as Reports and Company Call Log
- **Standard (International)**: Full access to user level settings, access to features plus international dialing
- **Standard**: Full access to user level settings, access to features and no international dialing

Note: Predefined roles cannot be modified.

Custom Roles*

You can create custom roles to meet your business needs. When creating a custom role you select an existing role as a starting point, and select permissions to be assigned to the role. To create a custom role, click **New Role**.

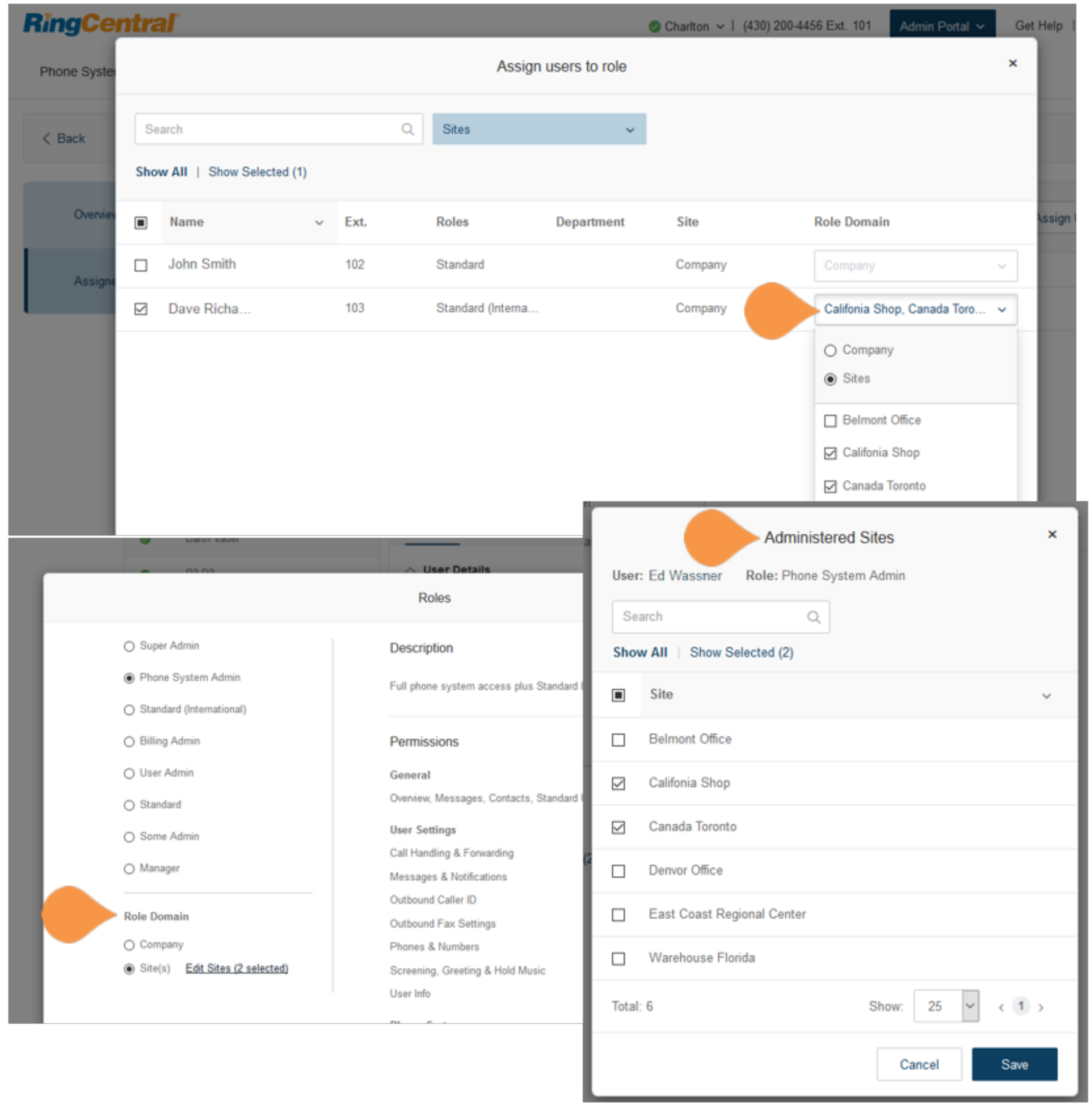
*This feature is available for Office Premium and Ultimate only.

Manage Permissions in Multi-Site Accounts

RingCentral Multi-Site support allows you to provision independent account configurations for your individual sites, to enable you to uniquely register and manage each site from your account.

When assigning an administrative role to a user, you need to define the “role domain” if there are sites created in the account. The role domain contains one or more sites in which the user has the assigned admin permissions.

Example: If a user is assigned with a role of “user admin” with a role scope of Belmont and Denver sites, the user can only perform user administrative actions for those two sites and all the assets within those sites.



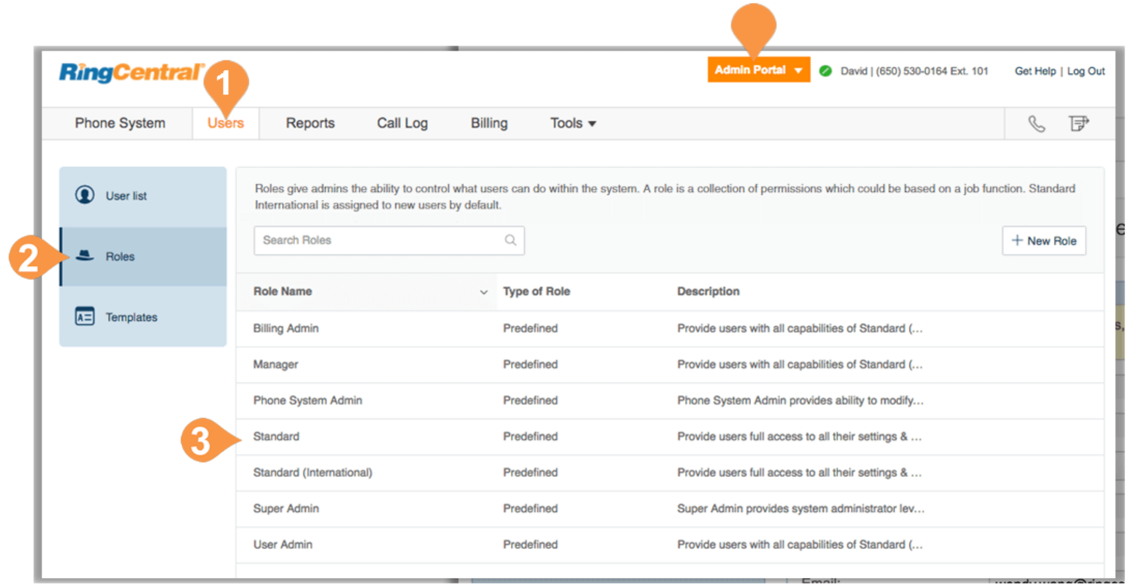
Assign Users to a Role

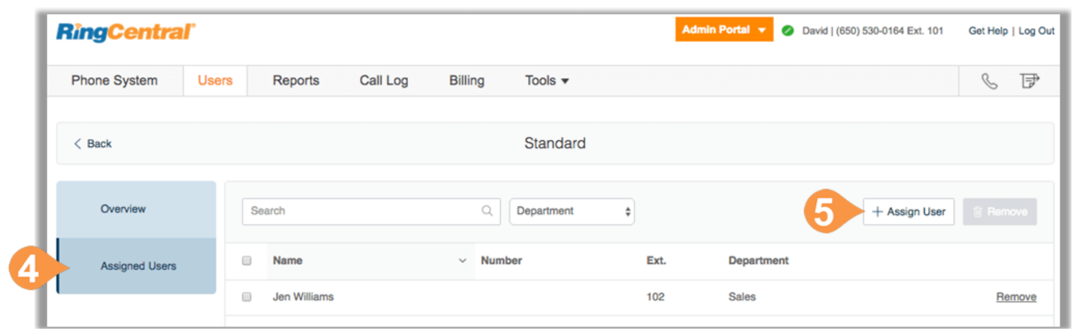
To assign users to a role:From the **Admin Portal**, select the **Users** tab.

1. Click **Roles**.
2. Select one of the roles to assign users.
3. Click the **Assign Users** tab to view the users currently assigned to the selected role.
4. Click **Assign User**.
5. A list of users and their currently assigned roles is displayed.
6. Select the users to assign to the role.
7. Click **Assign**.

The users' roles are assigned and displayed in the Users list assignments are displayed in the **Users** list.

*The **New Role** option is available for Office Premium and Ultimate users only.

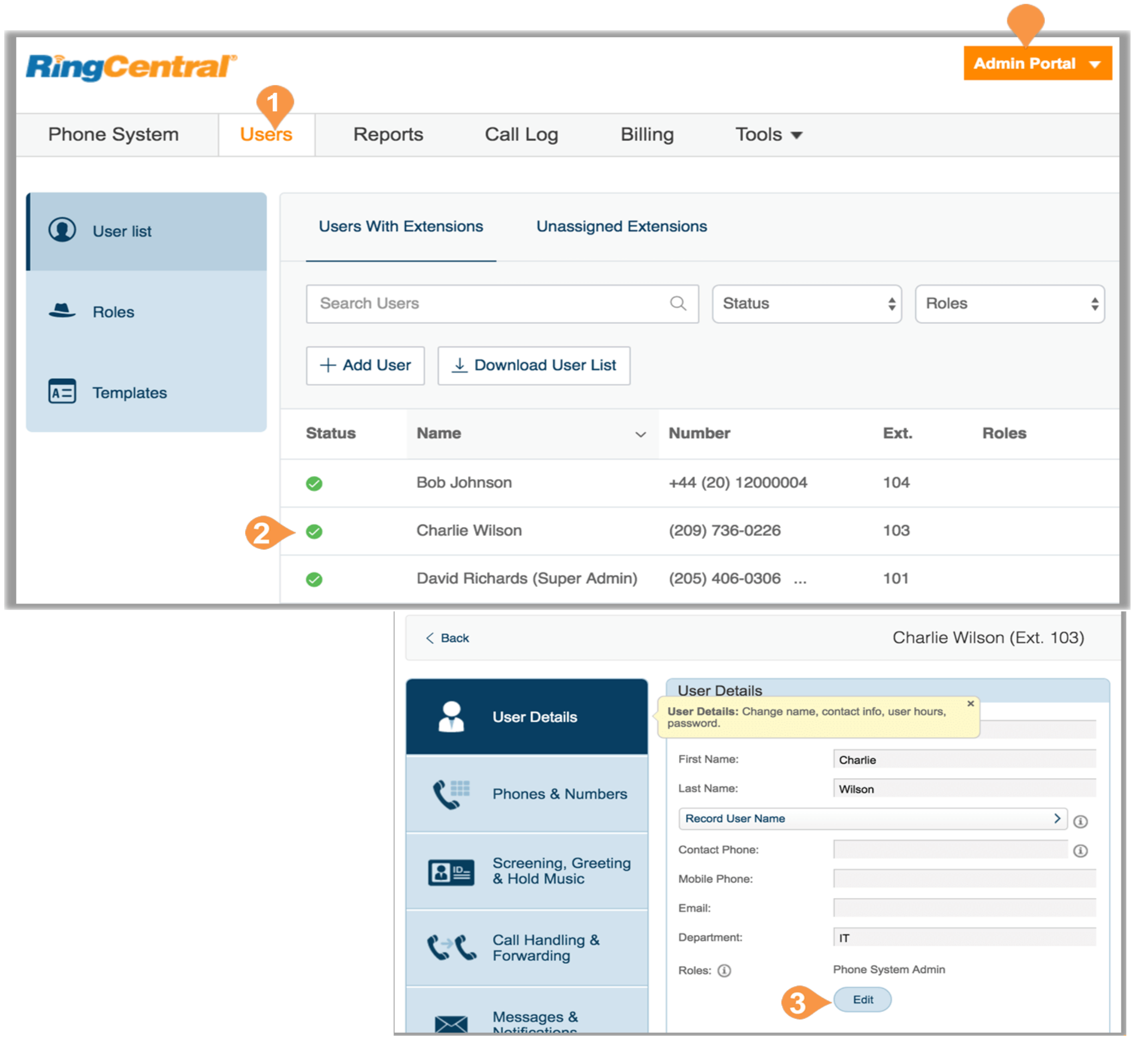




Modify a User's Role

You can modify a user's role by editing the user's page.

1. From the **Admin Portal**, select the **Users** tab.
2. Click the user whose role you will modify. The User details popup appears.
3. Click the **Edit** button next to **Role**.
4. Select the role.
5. Click **Save**.



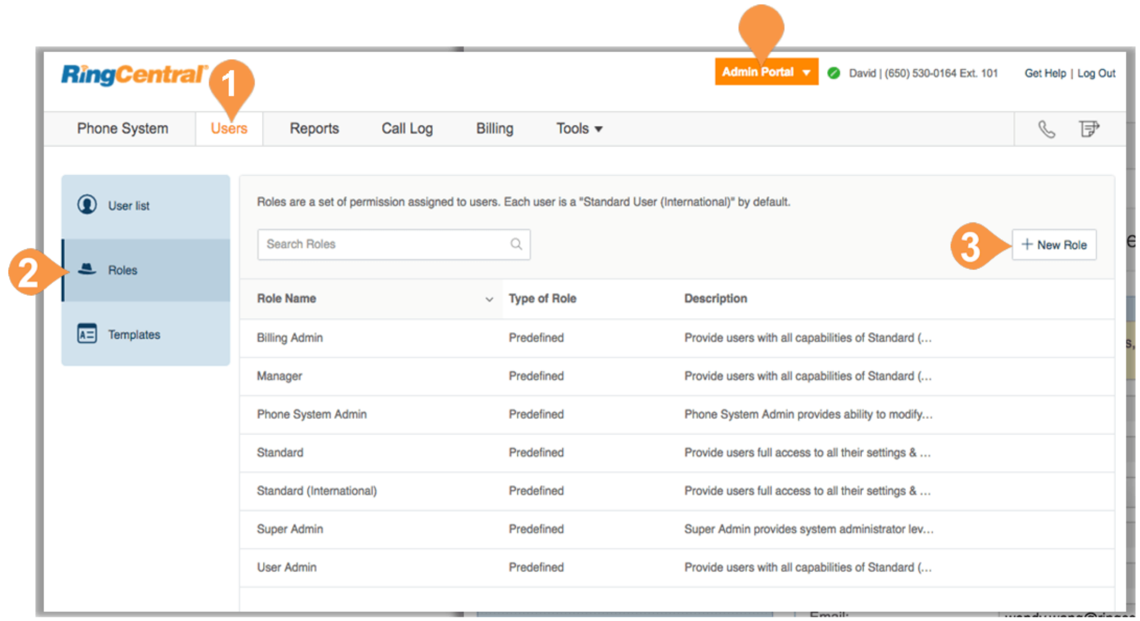
Create a New Role*

To create a new, custom role:

1. From the **Admin Portal**, select the **Users** tab.
2. Click the **Roles** panel.
3. Click **New Role**.
4. Select a role to use as a template, or starting point, then click Next. The **Create New Role** pop-up appears.
5. Enter the **Name** and **Description** for the new role, then click **Next**.
6. Set the permissions for the new role.
7. Click **Create Role**.

See also instructions on the following page.

*This option is available for Office Premium and Ultimate only.

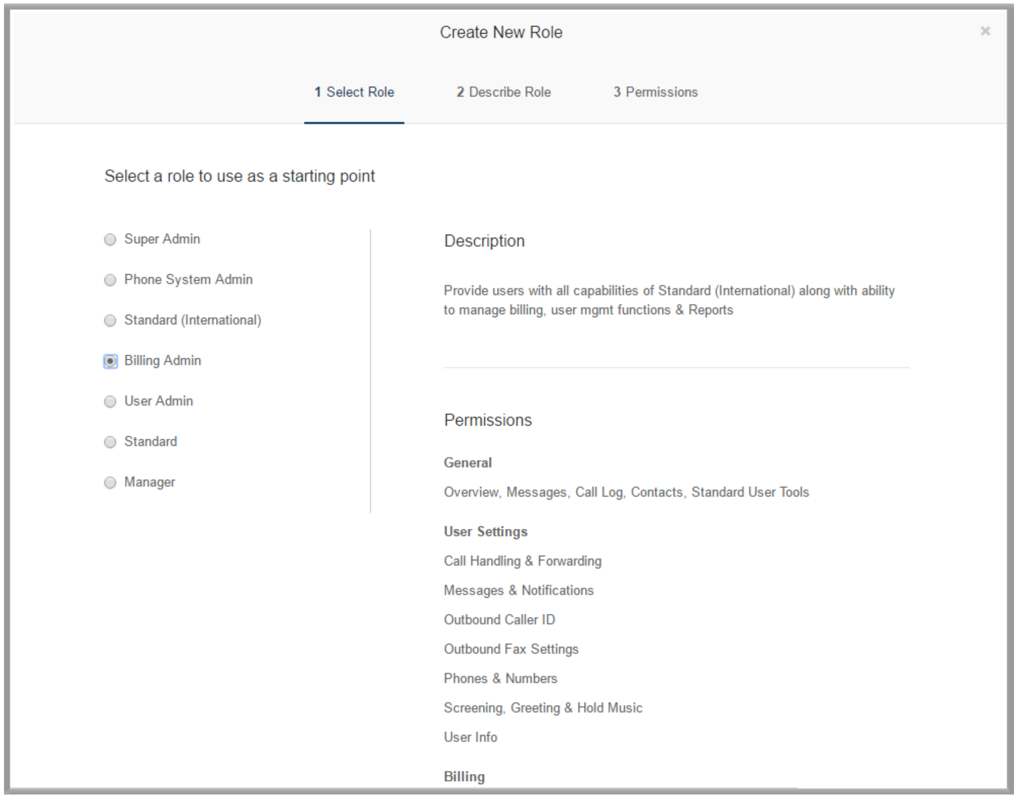


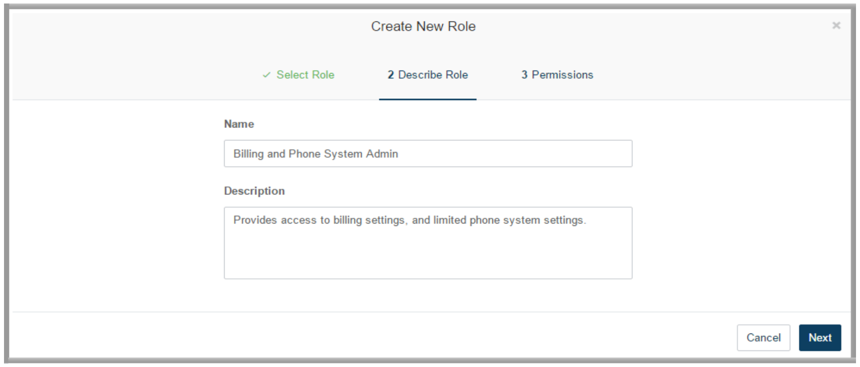
Step 1: Select Role

Select a role to use as a starting point. The permissions included in the starting role are displayed.

Step 2: Describe Role

Enter a **Name** for the role and a **Description** of the permissions of the role.

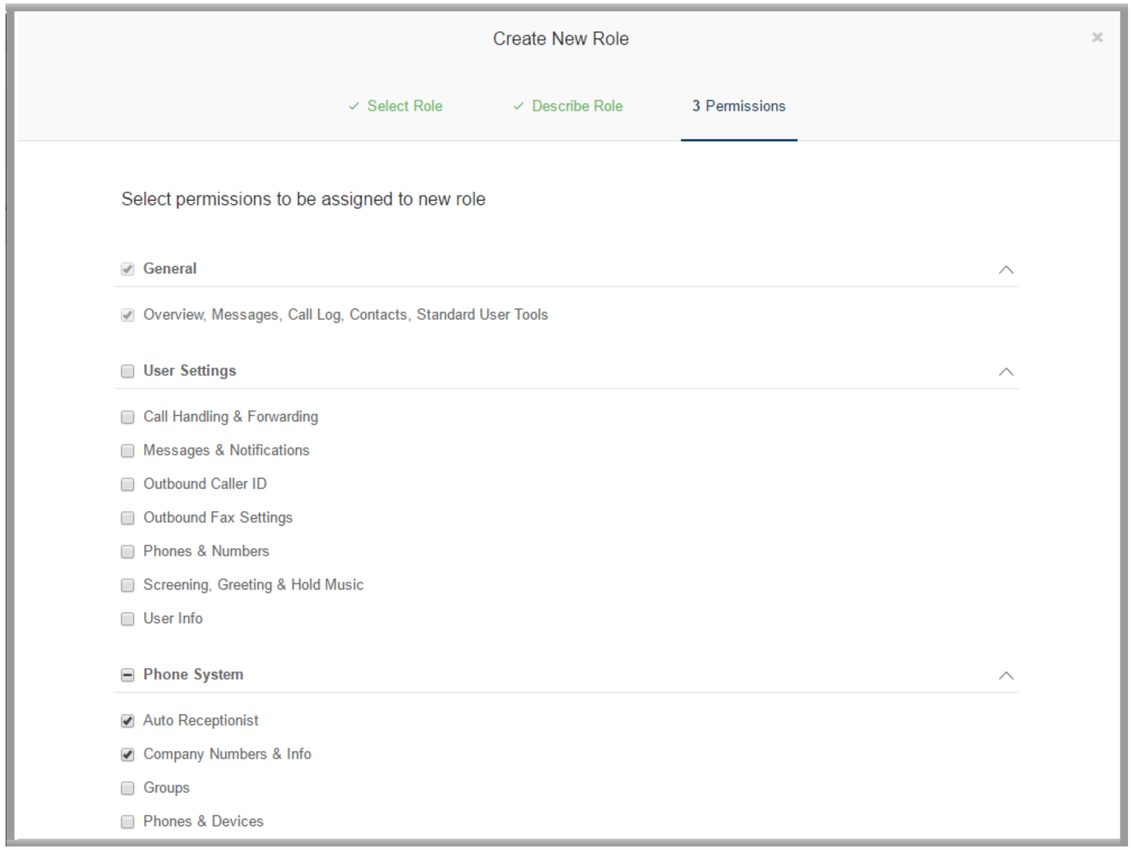




Step 3: Permissions

Select permissions for the role by adding to or removing permissions as required. Multi-Site permissions are found in the bottom section which includes Site Management and Sites Call Log. For more information on Multi-Site support, see Multi-Site Settings.

The role is created and appears in the list on the Roles panel. To assign users to the role, see “Assign Users to a Role” on page 170..



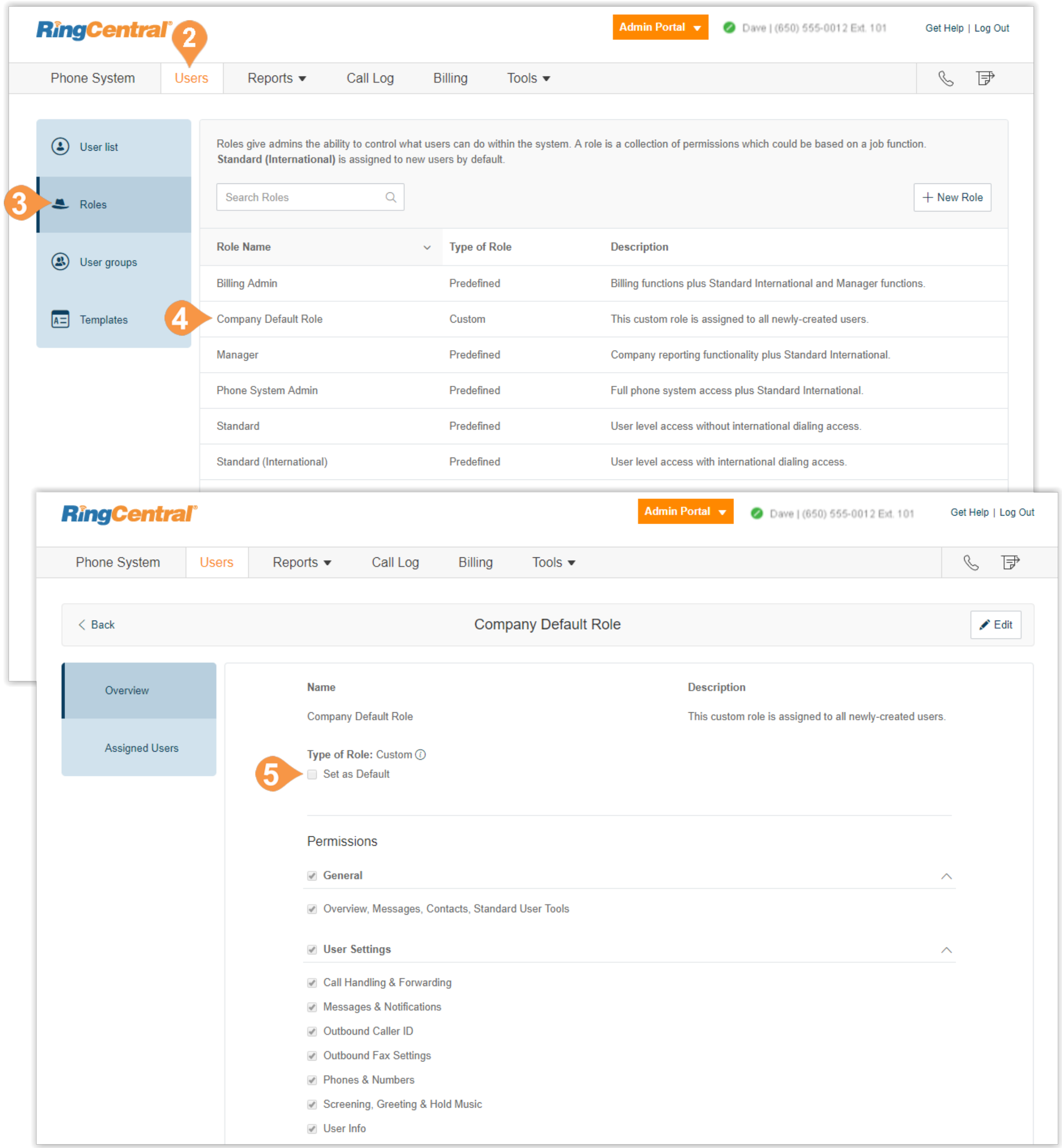
RingCentral

Setting a Default Role

For ease of use, you can create a custom role and then set that role as the default role assigned to all newly-created users.

If you do not set a default role, all newly-created users are automatically set to the Standard (International) role.

1. Create your custom role. See “Create a New Role*” on page 172.
2. From the Admin Portal, click **Users**.
3. Click **Roles**.
4. Select the custom role you created.
5. Click the check box, **Set as Default**.



User Groups

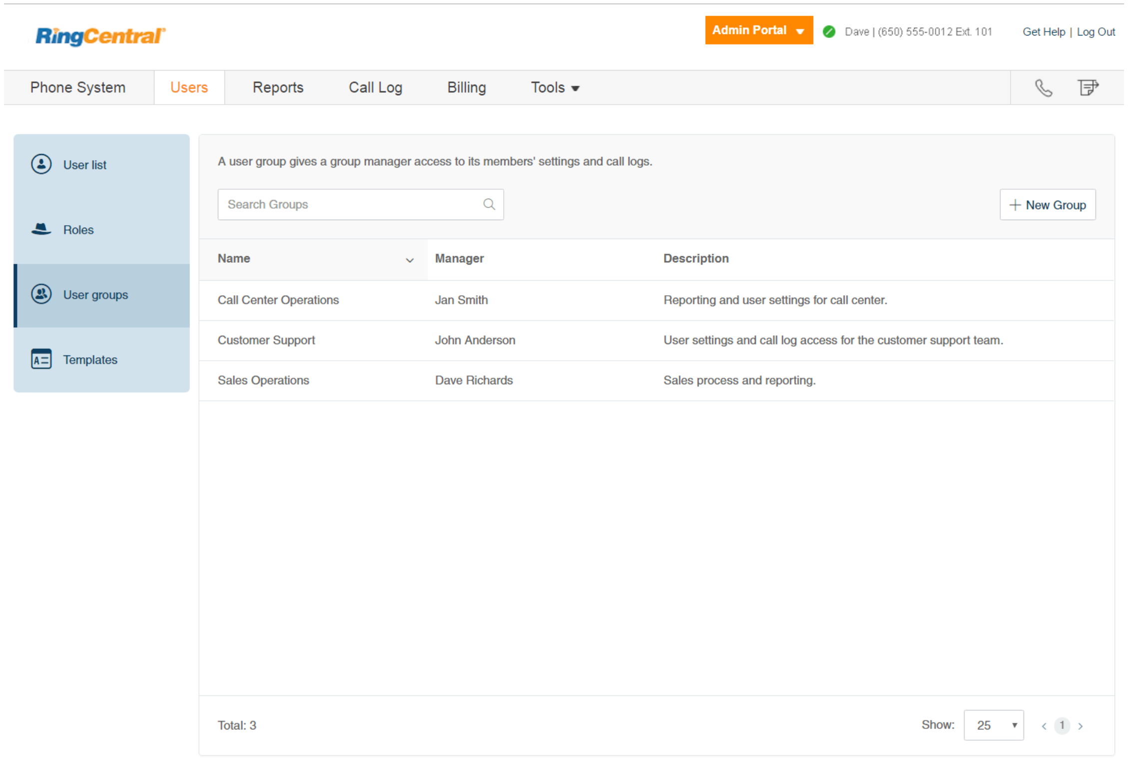
Manage User Groups*

A RingCentral User Group associates users based on organization hierarchy. A group is managed by a user group manager who accesses and modifies group members' settings and view their call logs. The account administrator controls who gets access to view or create user groups.

The account administrator creates multiple groups as required for your organization. A flat, non-nested group structure is supported. Users may belong to multiple groups. For example, for a director with two team managers (and their team members), you might create three user groups: one group for each of the team managers, and an overall group for the director that includes all reporting members.

When a user is assigned to be a user group manager, the user automatically inherits certain permissions. These permissions work in conjunction with the role assigned to the user in the Roles section of user administration. You must ensure that the primary role has the correct permissions so that user access is controlled when the user is given user group manager access.

* This feature is available for Office Premium and Ultimate only.



User Group Management Tasks

The tasks involved in managing user groups include:

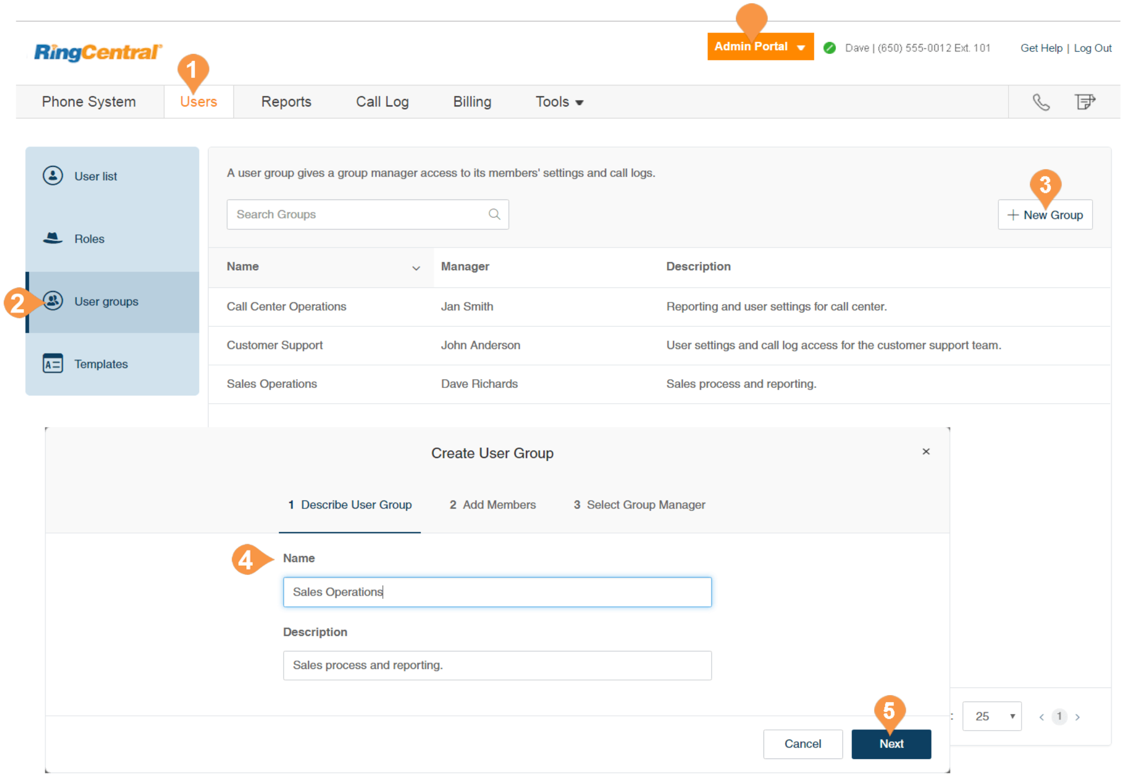
- **Assigning Users to User Groups**: the Templates section in user management allows the account administrator to streamline the assignment of users to user groups. This assignment is performed in the User Groups option in Templates. See “Templates” on page 182.
- **Viewing and modifying User Settings**: the User Settings sections, accessed from the User List in user management, allows the user group manager to view and modify the settings assigned to a member of their group, including the roles and user groups in the User Details section. See “Templates” on page 182.
- **Accessing Reports for your group members:** Office@Hand Reports help admins and user group managers optimize the phone system by presenting usage analysis and trending metrics in an easy-to-read graphical format. When logged in as a user group manager, you can see your group members’ data only. See “Reports” on page 191.

Create a User Group

When you create a user group, you organize a group of users by adding members to the group and assigning a group manager who can modify members' settings and view their call logs. The manager must have at least a User Admin role and permission to access the group manager interface. For more information, see "Roles and Permissions" on page 167. .

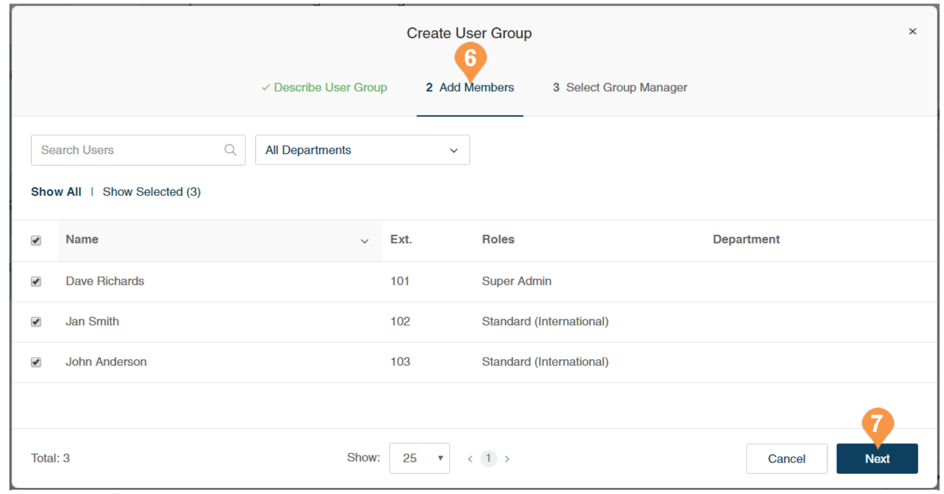
1. From the **Admin Portal**, click the **Users** tab.
2. Click **User Groups**. You will see a list of existing user groups, if any.
3. Click **Create** (if no user groups exist), or click **New Group**.
4. Enter a **Name** and **Description** for the user group.
5. Click **Next**.

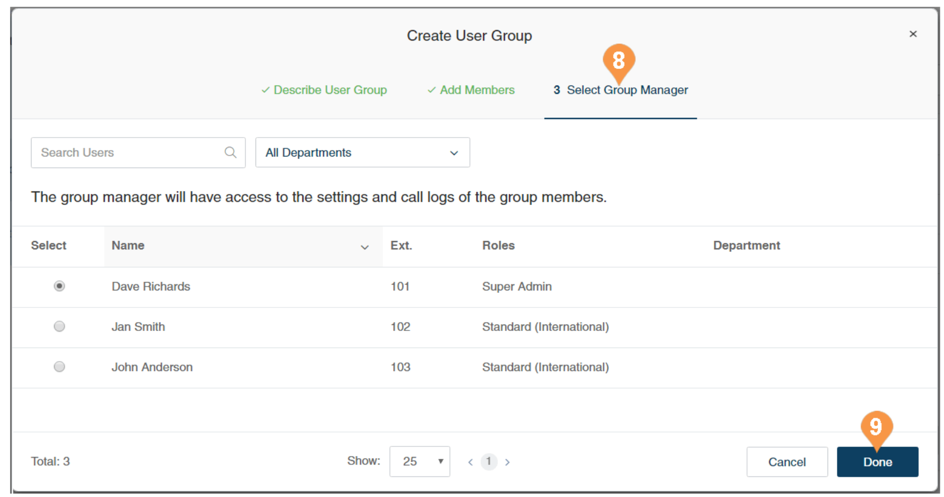
Instructions continue on the following page.

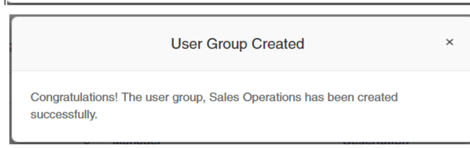


6. Add members to the user group. Search by department or all departments, and check to select the users.
7. Click **Next**.
8. Select a member of the user group to be the user group manager. (The manager must be a member of the user group).
9. Click **Done**.

The user group is created and a confirmation message is displayed. The user group's name and manager are displayed in the User Groups view.





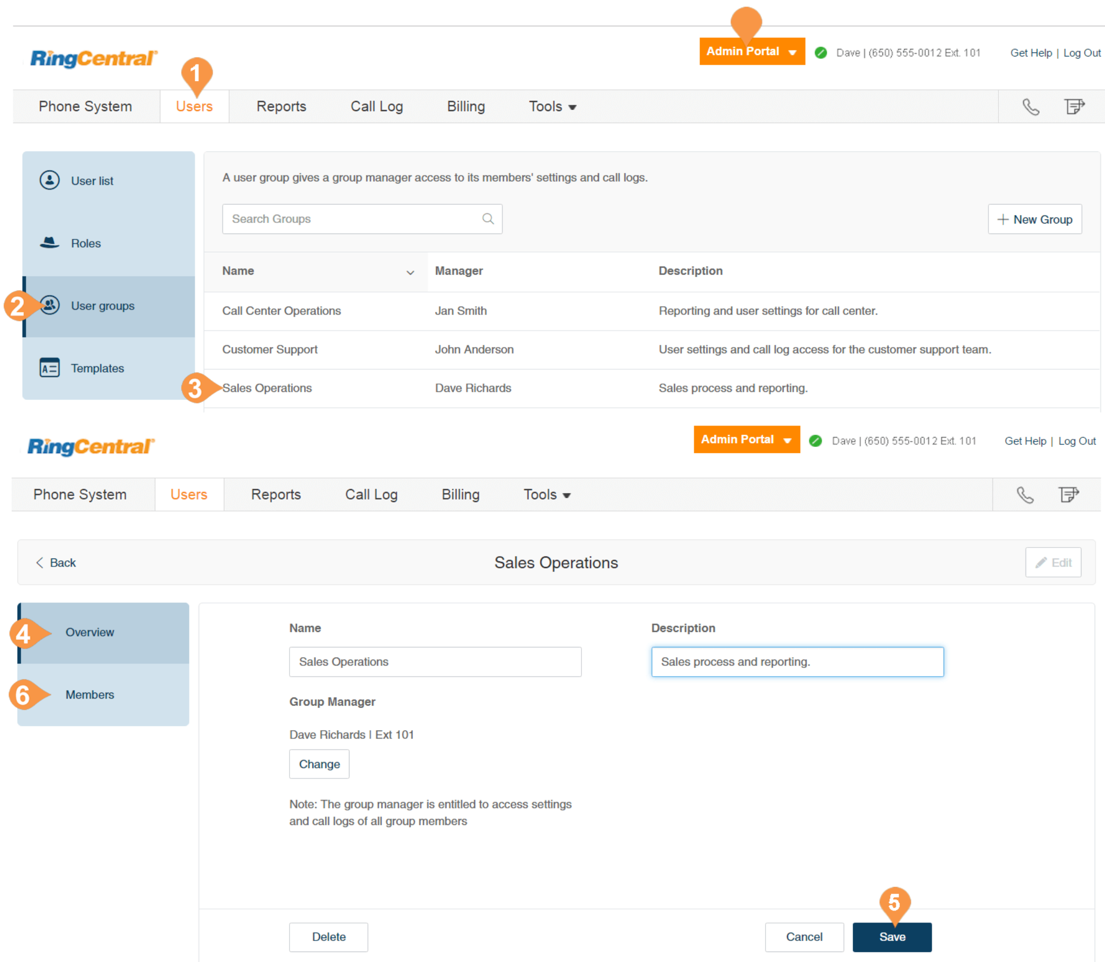


Edit a User Group

To edit or delete an existing user group:

1. From the **Admin Portal**, click the **Users** tab.
2. Click **User Groups**.
3. Select an existing group from the list.
4. On the **Overview** page, click **Edit** to change the name or description of the user group. To change the manager of the user group, click **Change**, select a new manager, and click **Done**.
5. Click **Save** to save the group's changes.
6. On the **Members** page, add to or remove members from the group as needed. To add a member click **Add Member**, select members to be added, and click **Add**.

To delete a user group, click **Delete** and confirm the deletion. Deleting a group will result in members being removed from the group and the group manager losing some privileges.



Templates

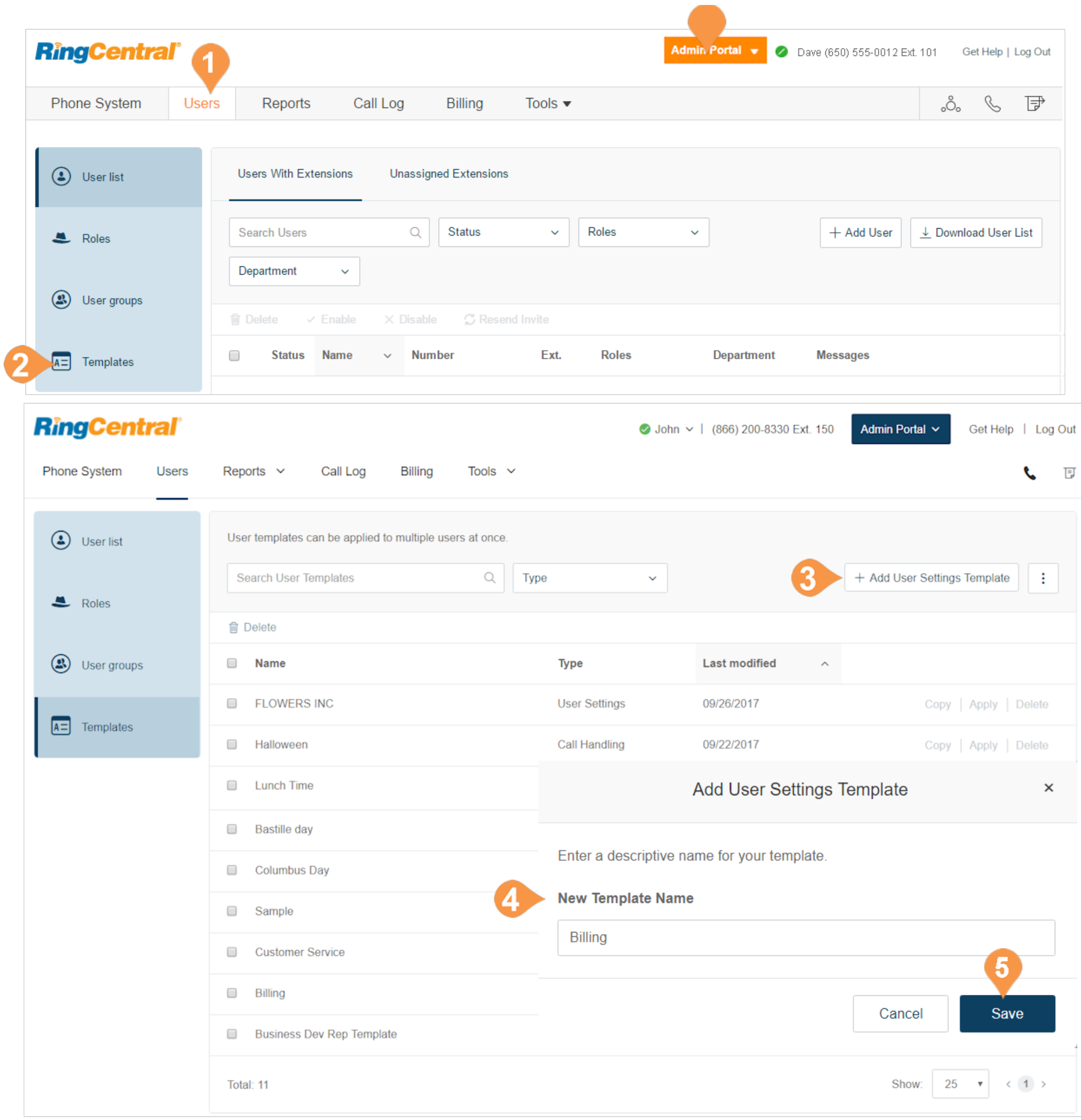
Templates*

RingCentral Templates will save you time and repetitive manual effort by streamlining your administrative routine. There are two types of templates, one for user settings and another for specifying call handling rules. Create a template and apply it to users as you need.

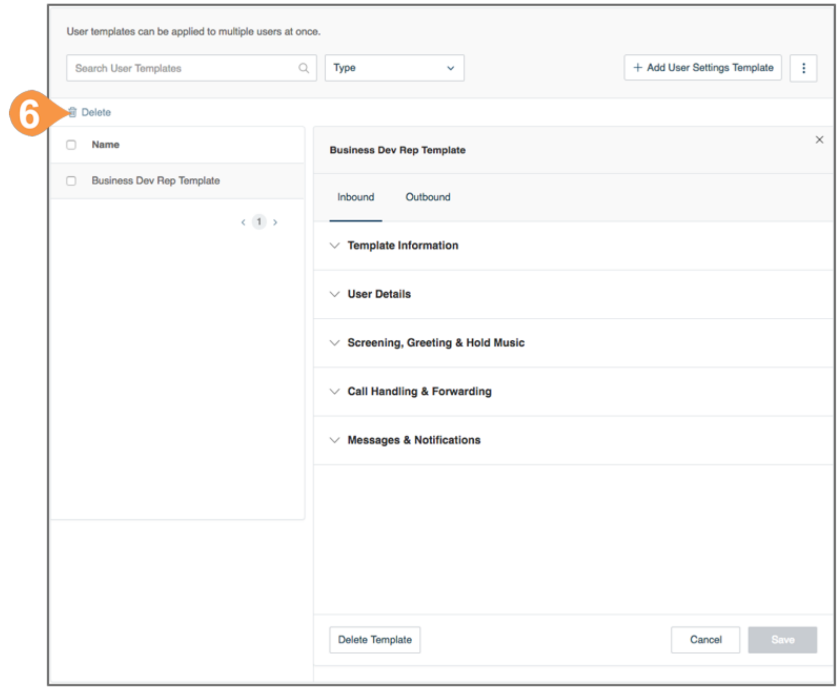
Create a Template for User Settings

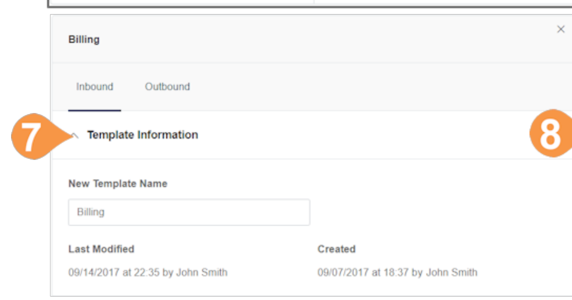
1. From the **Admin Portal**, click the **Users** tab.
2. Click **Templates**.
3. Click **Add User Settings Template**.
4. Enter a **New Template Name**.
5. Click **Save**.

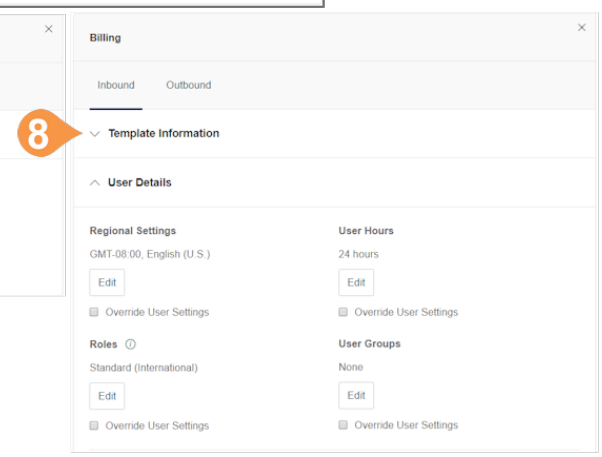
*Not available for one-line accounts.



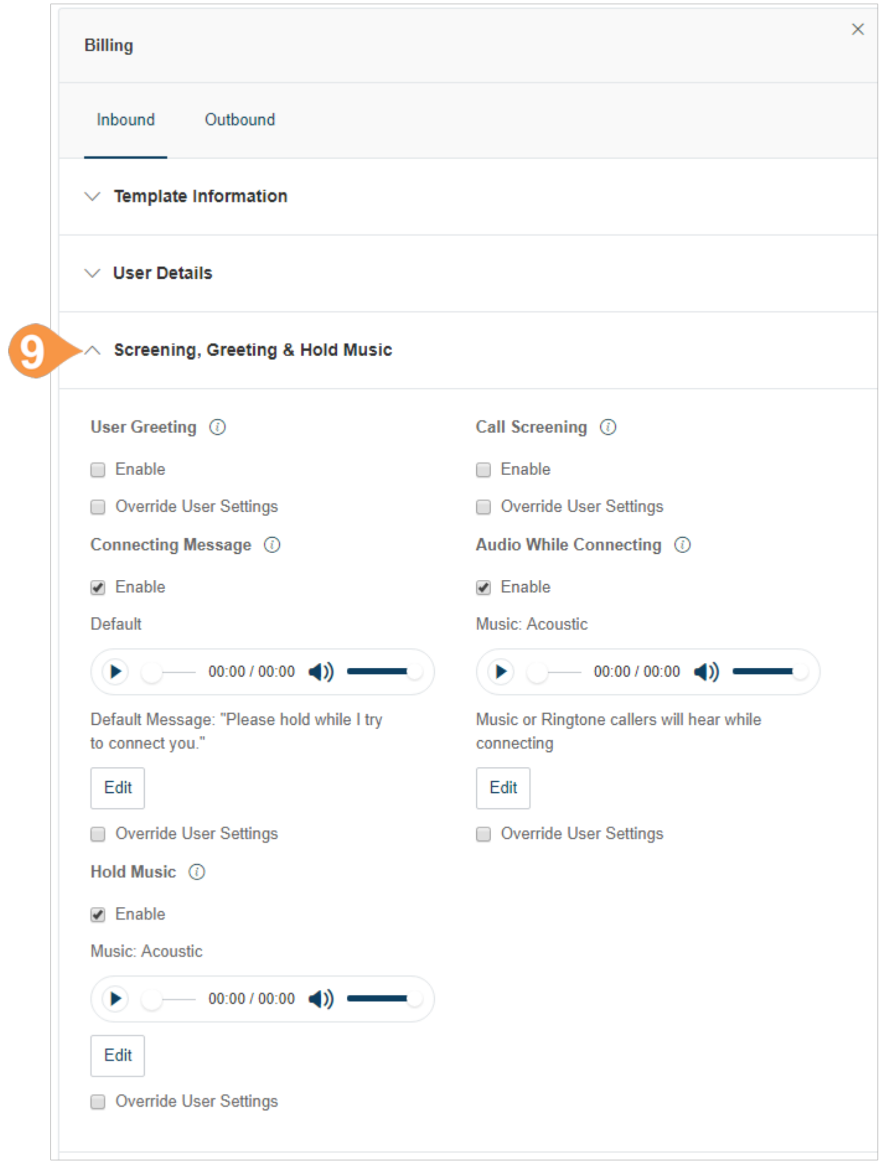
6. Select a template from the left pane. You see options you can set for this template in the right panel, grouped into categories of settings for Inbound and Outbound calling. For each group of settings, you can specify whether the settings override each users' settings by checking **Override User Settings**.
7. Configure **Template Information** settings.
   a. **New Template Name**: Edit the name of your template and see the last time it was modified and when it was created.
8. Configure **User Details** settings.
   a. **Regional Settings**: Specify regional settings for users such as timezone and time format.
   b. **User Hours**: Set user hours to 24 hours or Specify hours.
   c. **Roles**: Select the role to be applied to the users. Roles give admins the ability to control what users can do within the system. A role is a collection of permissions which could be based on a job function.
   d. **User Groups**: Specify the user groups where the user is to have membership.
   e. **Emergency Address**: Provide a physical address for First Responders.
   f. **Bandwidth Settings**: To improve the quality of your calls, you can set how much network bandwidth to use for calls:
      - High Bandwidth - gives you better sound quality but calls can become choppy when it's not available.
      - Low Bandwidth - gives you lower sound quality but ensures no interruptions during your conversation.
   g. **Receive Communications from RingCentral**: Select if users receive voicemail messages from RingCentral on product education.



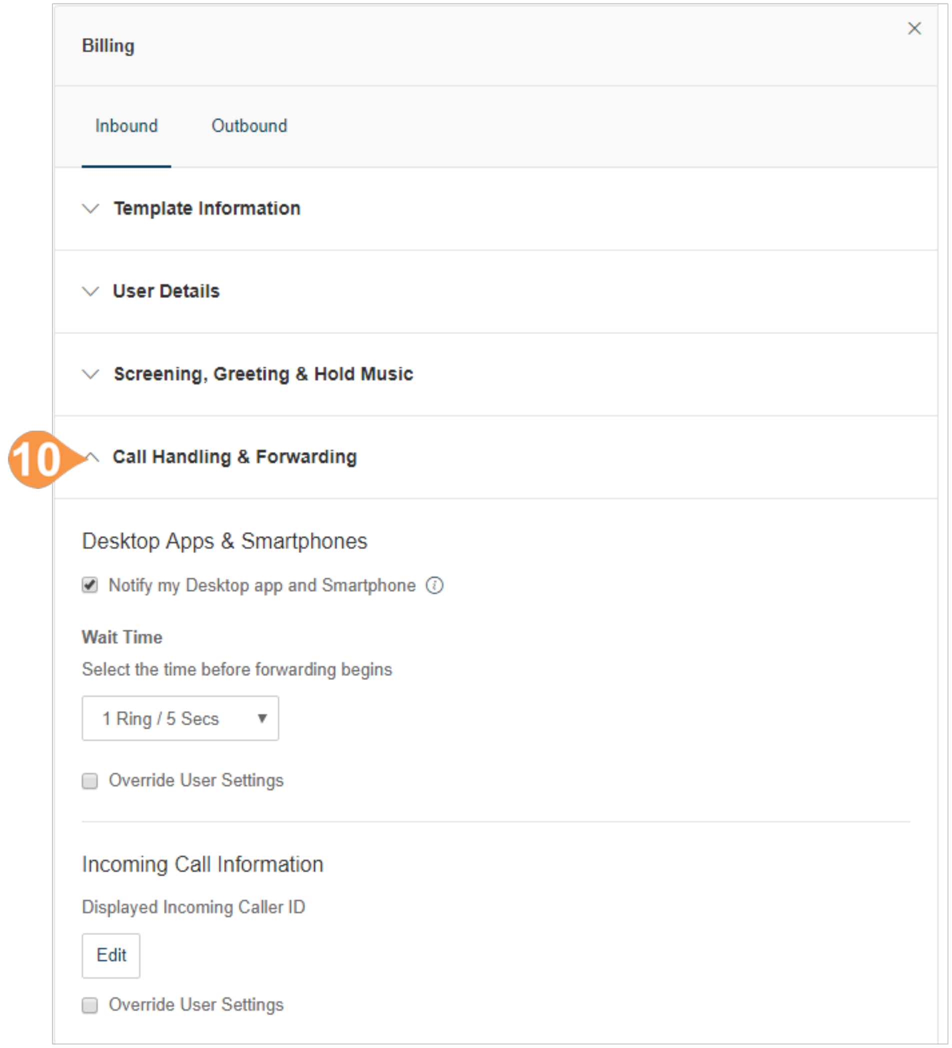




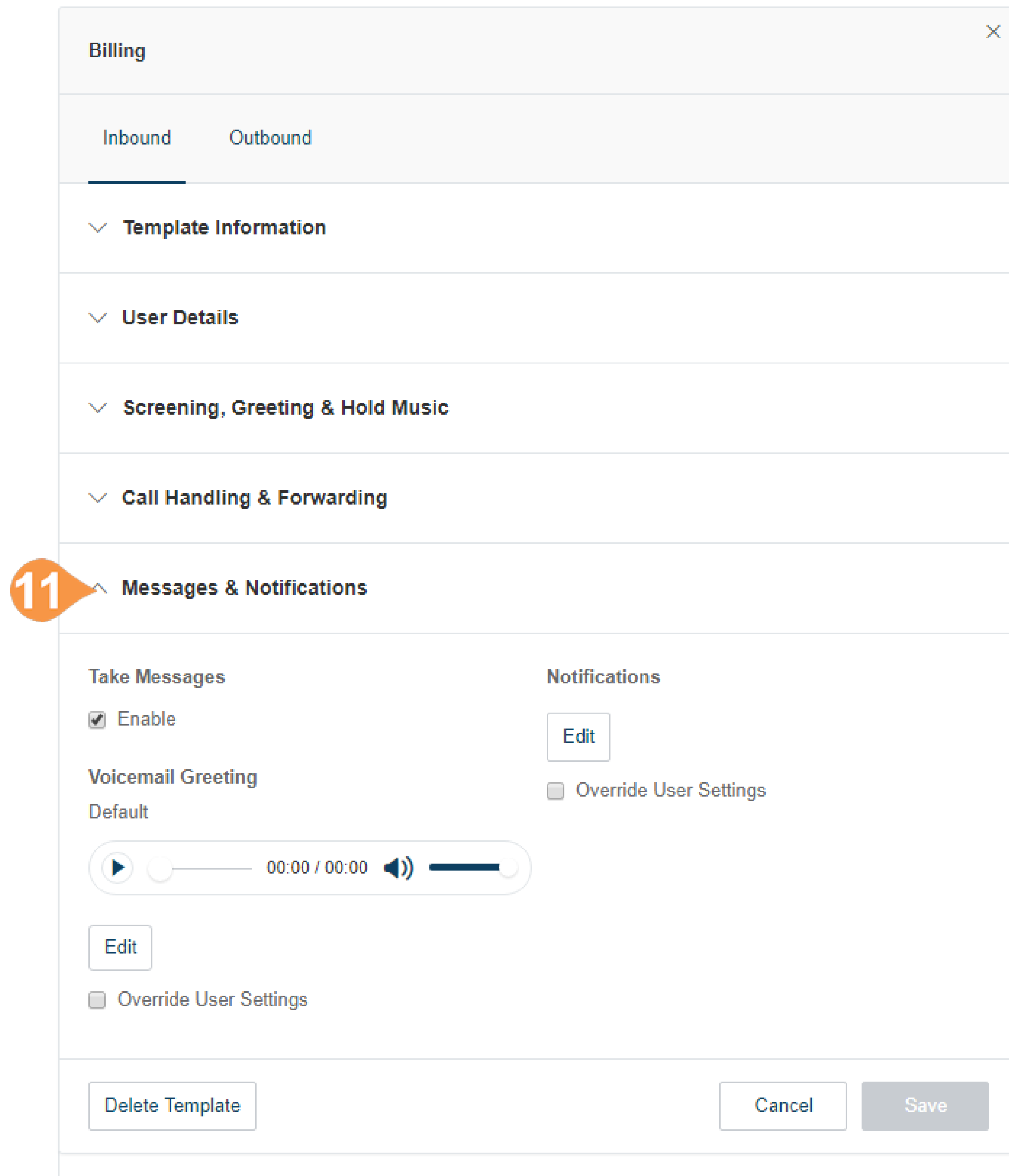
9. Configure **Screen, Greeting, and Hold Music** settings.
   a. **User Greeting:** Turn on this option when you want the system to answer the call with a recorded welcome message so callers know they've reached the right person. This is not a personal voicemail announcement.
   b. **Call Screening:** Turn on this option when you want callers to announce their name before continuing to connect the call. This option lets you identify the caller so you can pick up the call immediately. After turning on this option, go to **Call Handling & Forwarding** > **Settings** > **Incoming Call Information** to set your preferences.
   c. **Connecting Message**: Set a recorded message you want callers to hear to let them know the call will now be transferred to your line.
   d. **Audio While Connecting**: Incoming callers will hear the music selection that is configured with this setting. The music selection callers will hear when they are placed on hold can be set in the Hold music selection. Note that the **Audio While Connecting** setting is applied on a rule basis, whereas the **Hold Music** setting is applied for all calls.
   e. **Hold Music**: Turn on this option when you want callers to hear music whenever you put a call on hold.



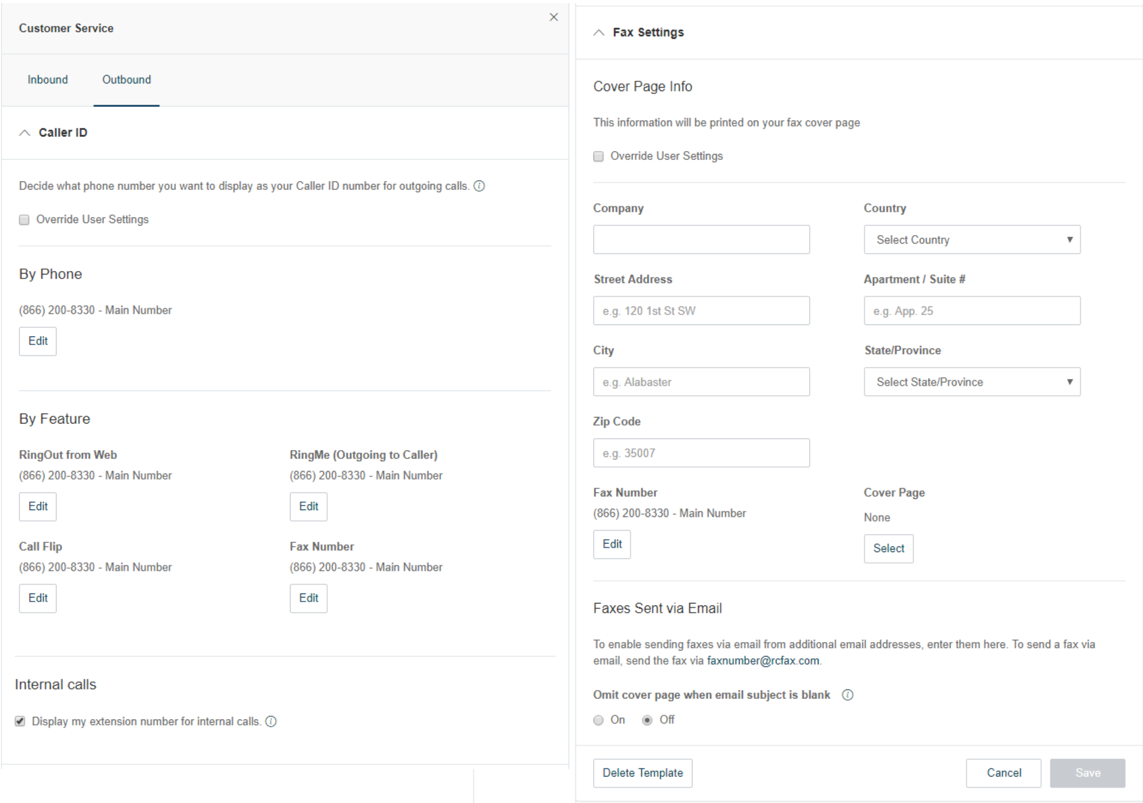
10. Configure **Call Handling and Forwarding** settings.
    a. **Desktop Apps & Smartphones**: Specify whether to notify your Desktop app(s) and smartphone(s) before forwarding the incoming call to your desk phones and forwarding numbers, and specify a wait time.
    b. **Incoming Call Information**: Specify display and announcements for incoming calls.
    c. **Outbound Caller ID**: Choose phone number to display as outbound caller ID for outgoing calls.
    d. **Outbound Fax**: Specify settings for sending outbound faxes, including cover page information, and settings for faxes sent by email. Configure **Messages and Notifications** Settings.



11. Configure **Messages and Notifications** settings.
    a. **Take Messages**: Allow or deny users to take voicemail messages; specify a default or custom voicemail greeting.
    b. **Notifications**: Choose how to be notified about voicemail messages missed calls, fax transmission results and received text messages.
    c. **Voicemail Greetings**: Specify a default voicemail greeting.

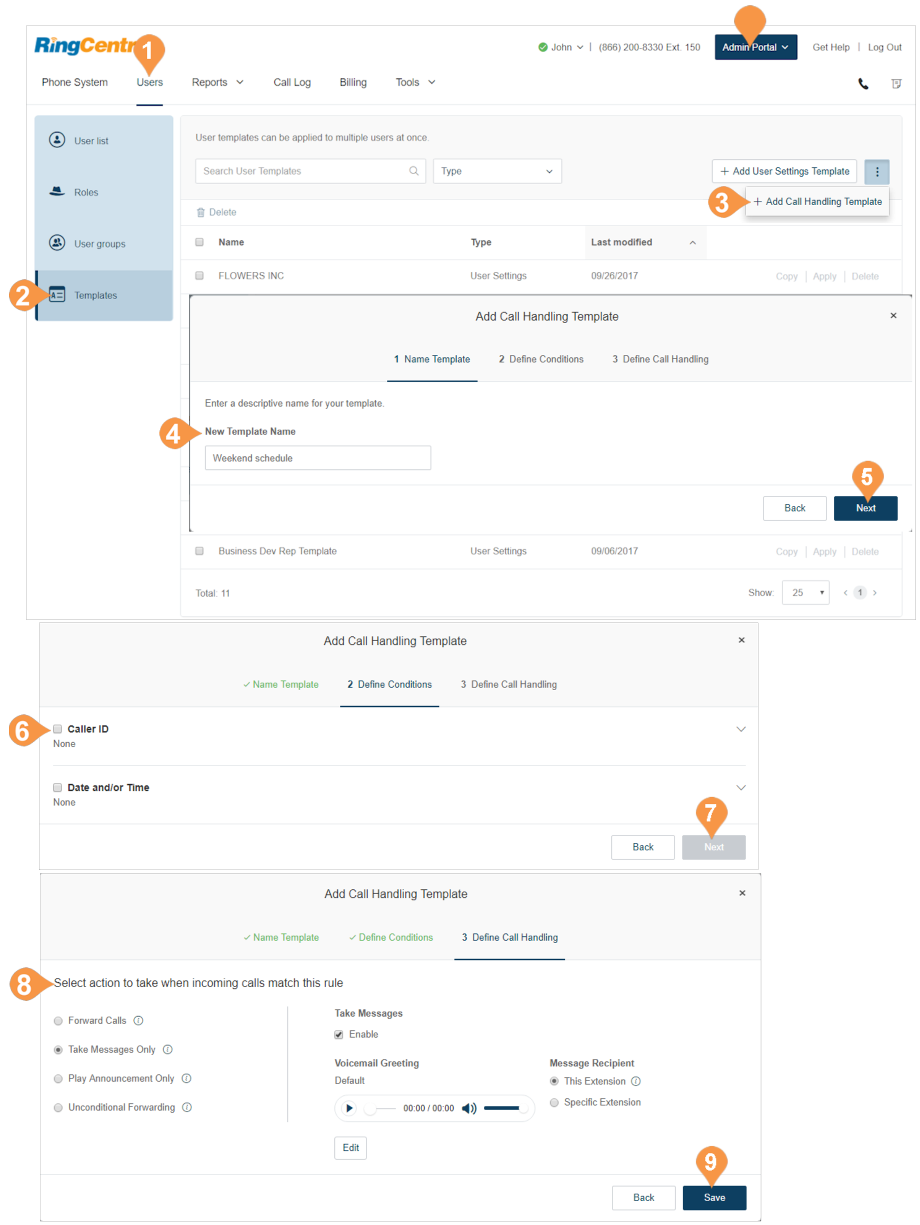


12. Click the **Outbound** tab to configure settings for outbound calls such as caller ID and fax settings.
    a. **Caller ID**: Specify caller ID settings by phone or by feature. If you select Toll-Free number or Blocked as your Default Caller ID for any of your endpoints/calling features, you can also select an alternate local number to use in case we detect that your call will not go through.
    b. **Fax Settings**: Specify fax settings including fax cover page information and settings for faxes sent through email.
13. Click **Save**.



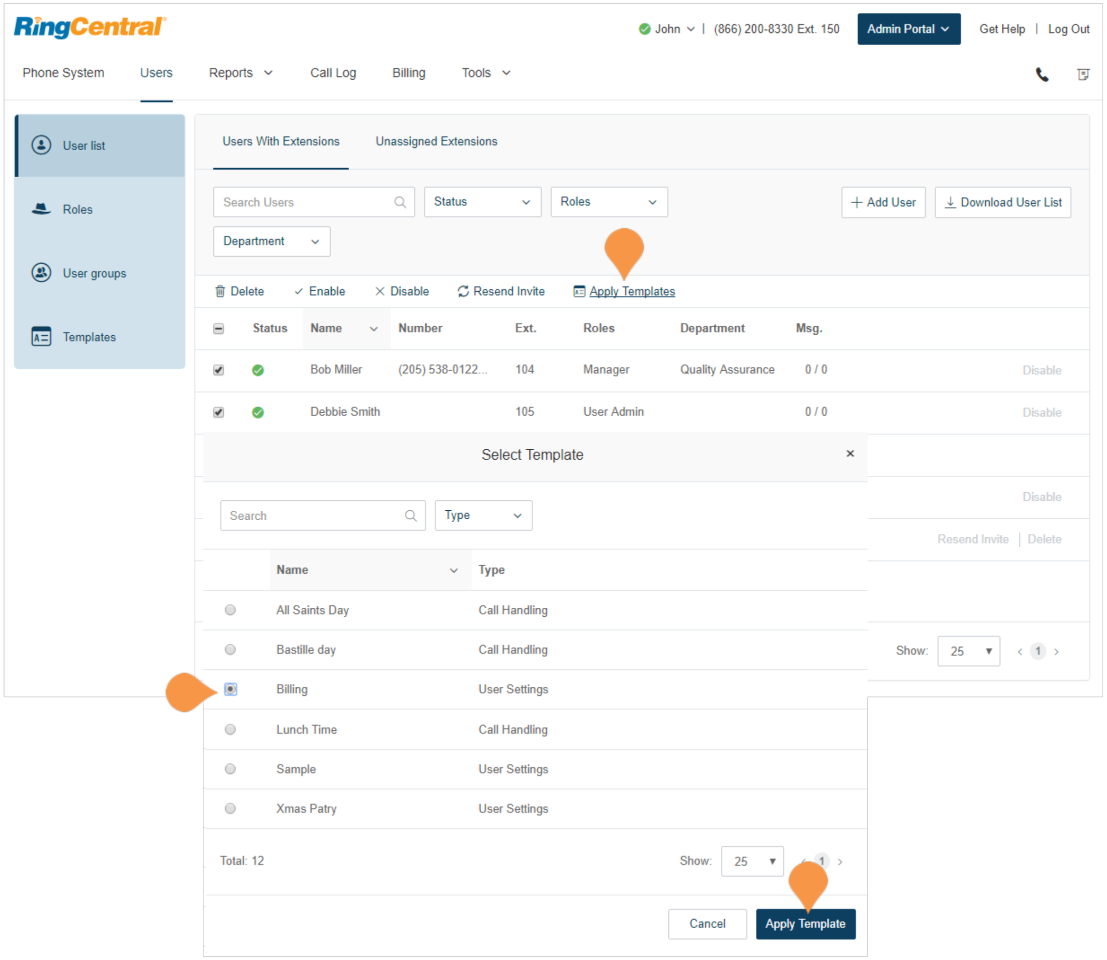
Create a Template for Call Handling Settings

1. From the **Admin Portal**, click the **Users** tab.
2. Click **Templates.**
3. Click **Add Call Handling Template**.
4. Enter a **New Template Name**.
5. Click **Next**.
6. Specify the caller ID or date conditions that will trigger the application of this template.
7. Click **Next**.
8. Specify the action to take when incoming calls match this rule.
9. Click **Save**.



Apply a Template to Users

1. From the **Admin Portal**, click the **Users** tab.
2. Select a number of users.
3. Click **Apply Templates**.
4. Select a template to apply.
5. Click **Apply Template**.
6. Click **Yes** to confirm that you are about to make settings changes for all the selected user(s). This will overwrite any configuration the user might have done previously.



Reports

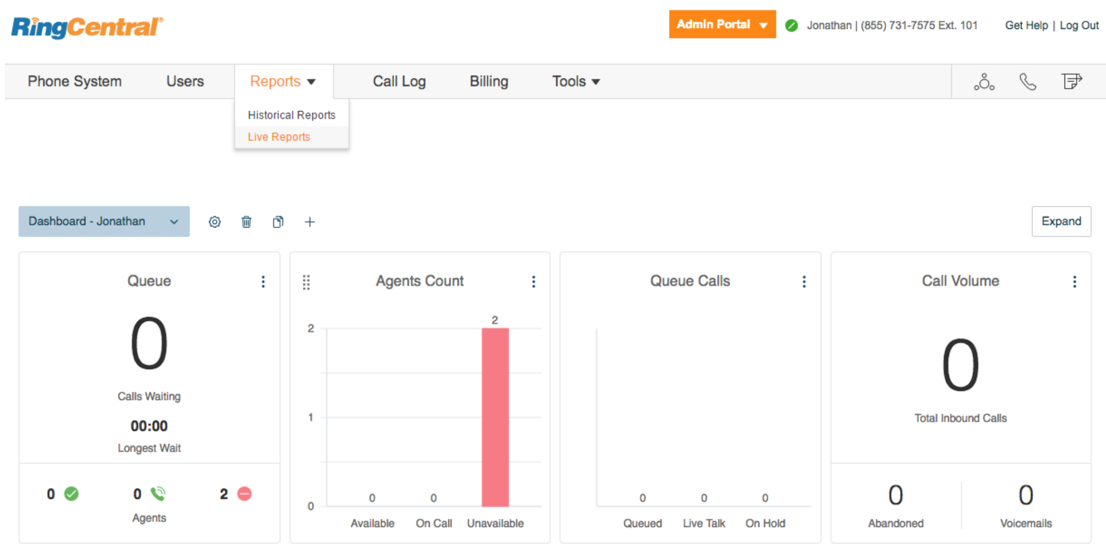
Live Reports

RingCentral Live Reports provides access to a separate section which allows building dashboards and reports to show data on inbound and outbound calls in close to real-time. Users with administrative access can create and customize reports based on metrics such as Service Level, Call Volume, Agents Count, Agent Details, Queue Monitor, Queue Details, and Queue Calls.

When you contact RingCentral to enable Live Reports for your account, users with admin privileges are granted access, and you can access a **Live Reports** menu item from the **Reports** menu.

For more information on using Live Reports, see:

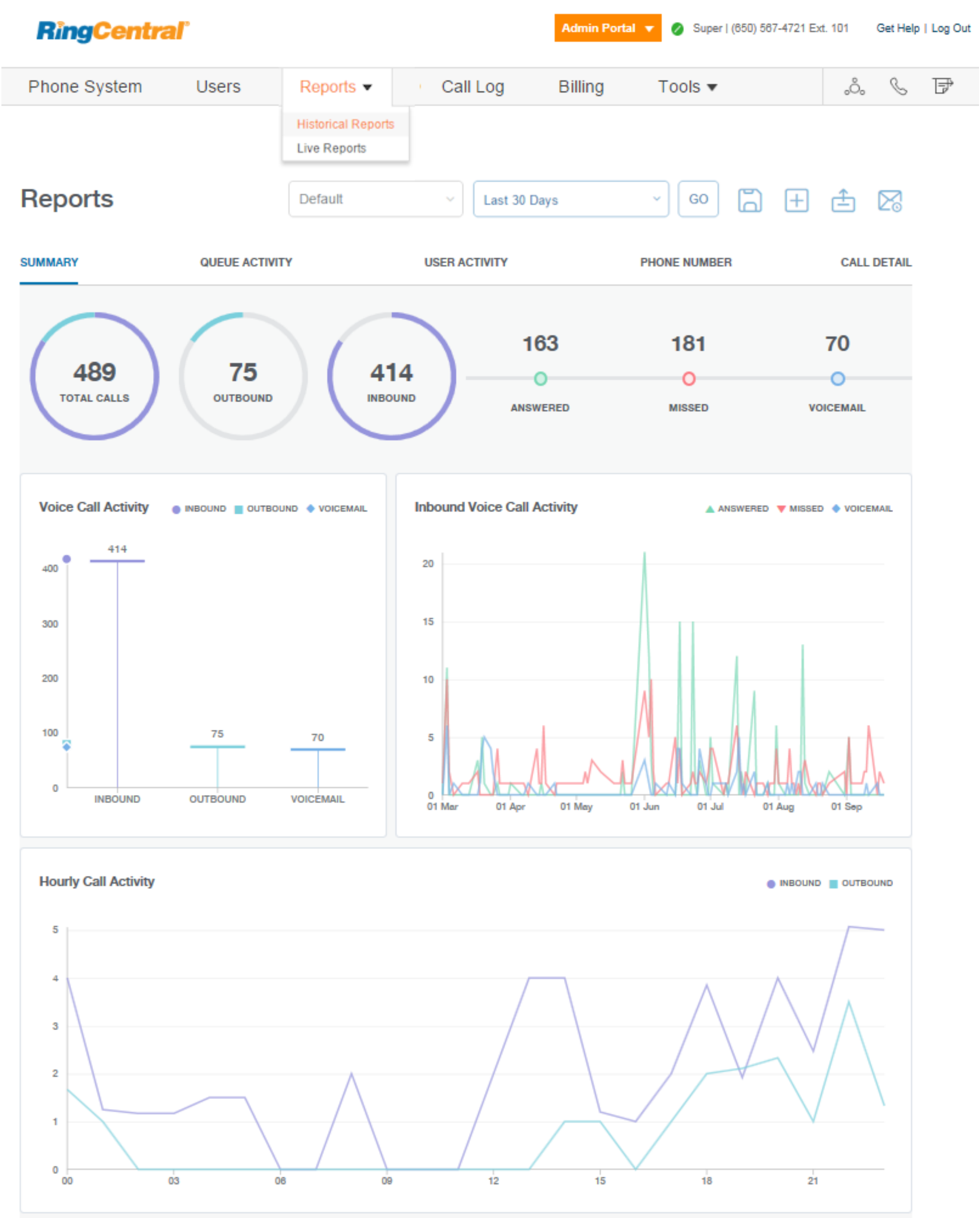
- Live Reports User Guide
- RingCentral Live Reports: Overview
- Live Reports FAQ



Historical Reports

RingCentral Reports helps admins optimize the phone system by presenting usage analysis and trending metrics in an easy-to-read graphical format. You can create reports for most of the call activity in your company, such as, inbound and outbound call volume, total calls, details on missed or answered calls, average calls per day and time, and more.

- The **Summary** report provides an at-a-glance, high-level usage overview of the entire phone system. Use the metrics to assess the volume of incoming and outgoing calls, or answered and missed calls, then review your business hours to ensure they're consistent with caller patterns.
- The **Queue Activity** report summarizes call queue activity and volume for historical activity. Review the ratio of calls answered vs missed, call wait times, and average talk time on a call, and fine-tune your call queue responses accordingly.
- The **User Activity** report summarizes inbound and outbound call volume and usage for selected users over a selected date range. Compare call volume metrics with a user's job performance or workload to understand how to optimize the calls for best results.
- The **Phone Number** report summarizes the call activities of each purchased phone number over a selected date range, so you can understand which numbers receive the most calls, which numbers result in the highest placement results, and which calls are answered.
- The **Call Detail** report (not available on mobile) provides call log information, including caller ID, destination, call duration, and call results, to allow you to understand and control the usage of the company's phone system.



Generate and Export Reports

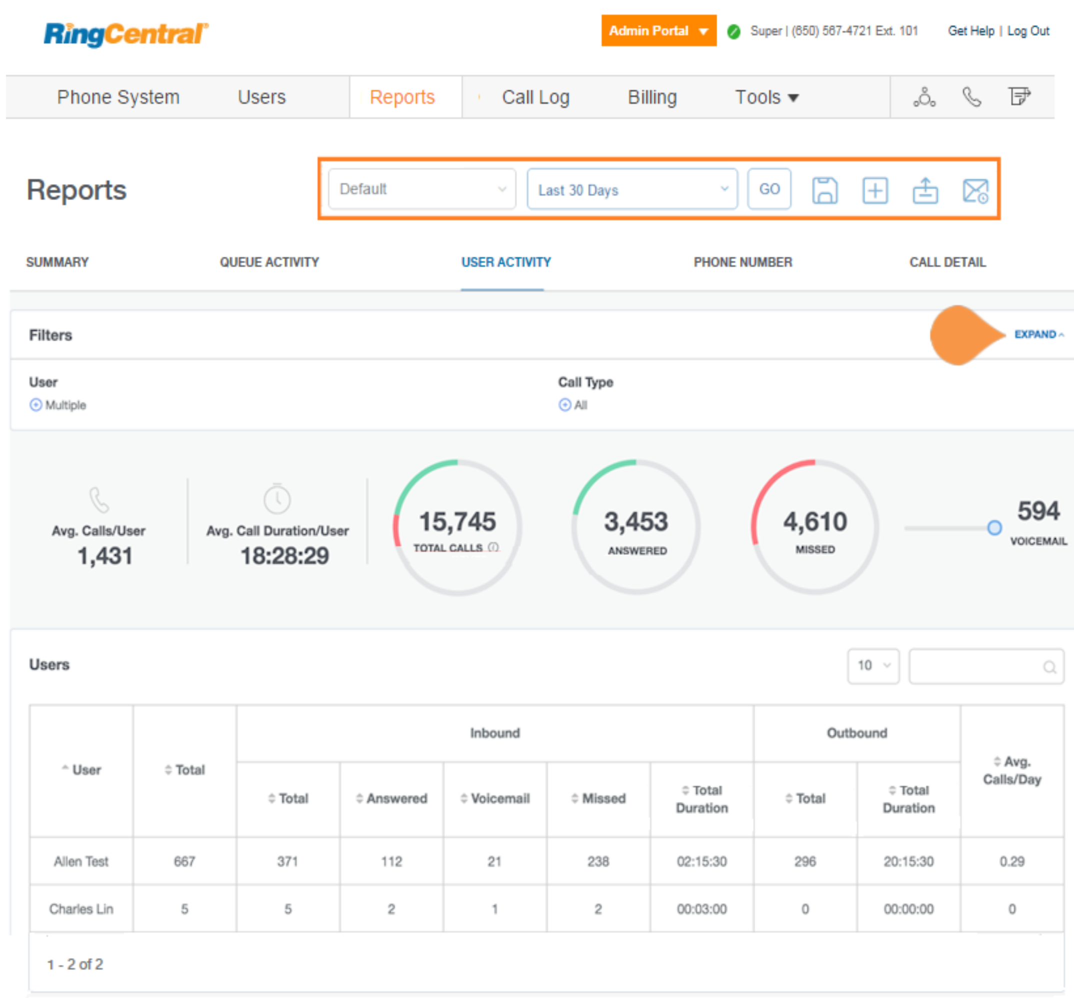
You can generate custom reports by settings filters that show the data you want. You can save Reports as a custom report, or export reports for later analysis.

Create a custom report by setting the filters you want, then selecting **Go**. Specify a fixed number of days, or a custom date range. Date and time information comes from the logged in user's regional settings. In the detailed report screens, you can click **Expand** to set more filters such as Call Type. Select the filters, and click **Apply**.

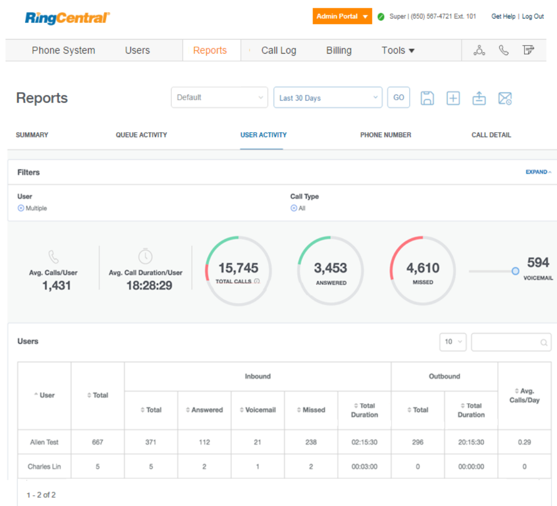
- To save your custom report for future viewing, select the **Add View** icon, and enter a name for the custom view. When you click **Save**, the view is added to the menu of available reports.
- To make changes to an existing report, select it from the menu, change the filters as needed, and click the **Save** icon.
- To export a report, select the report you want to export, click **Go**, and click the **Export icon**. The report is exported as a Microsoft Excel file. To learn more, click here.

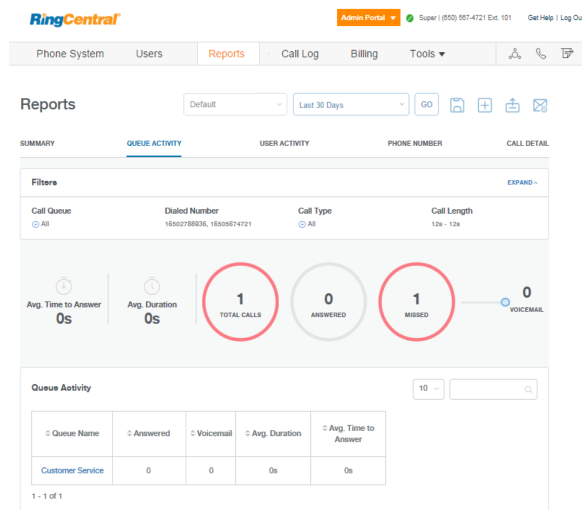
Administrators can also view the report dashboard from the RingCentral Phone app for iOS and Android. See the RingCentral Phone App Guide for more details.

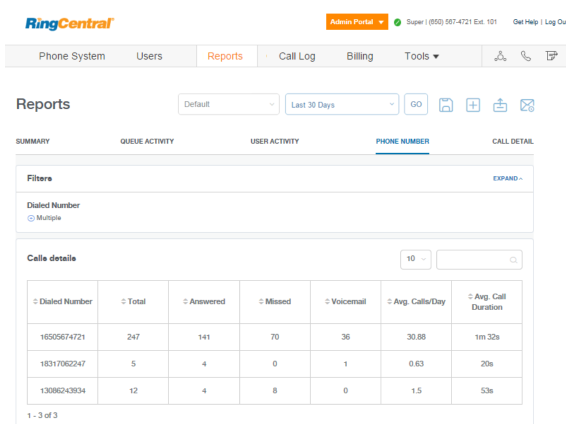
(See more reports on the following page.)

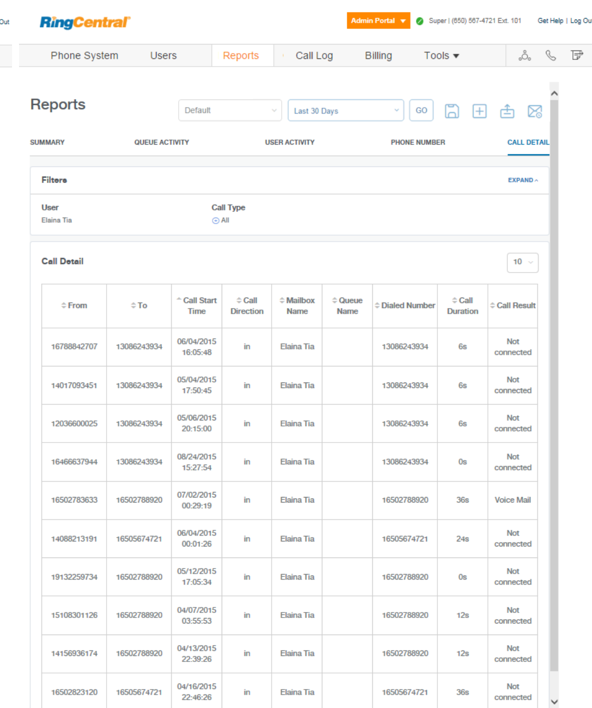


Reports for: **User Activity, Queue Activity, Phone Number, and Call Detail**.









Call Log

Call Log Description

The Call Log reports on inbound and outbound calls and faxes for the company number and specified extensions. The Call Log is available as a **Simple** view which concisely summarizes the calls, and as a **Detailed** view, which shows additional call record details.

You can filter the call log records by number, time period, call direction or type of call (inbound or outbound). Select your filter criteria, and click **Apply** to refresh the log. In **Delivery Settings**, you can set delivery of the call log to an email address on a daily, weekly, or monthly basis, on a specified day.

In the **Type** column you can see the types of calls. In the **Recording** column, you will see an icon if the call has been recorded. Click the play icon to hear a recording.

Inbound Call

Outbound Call

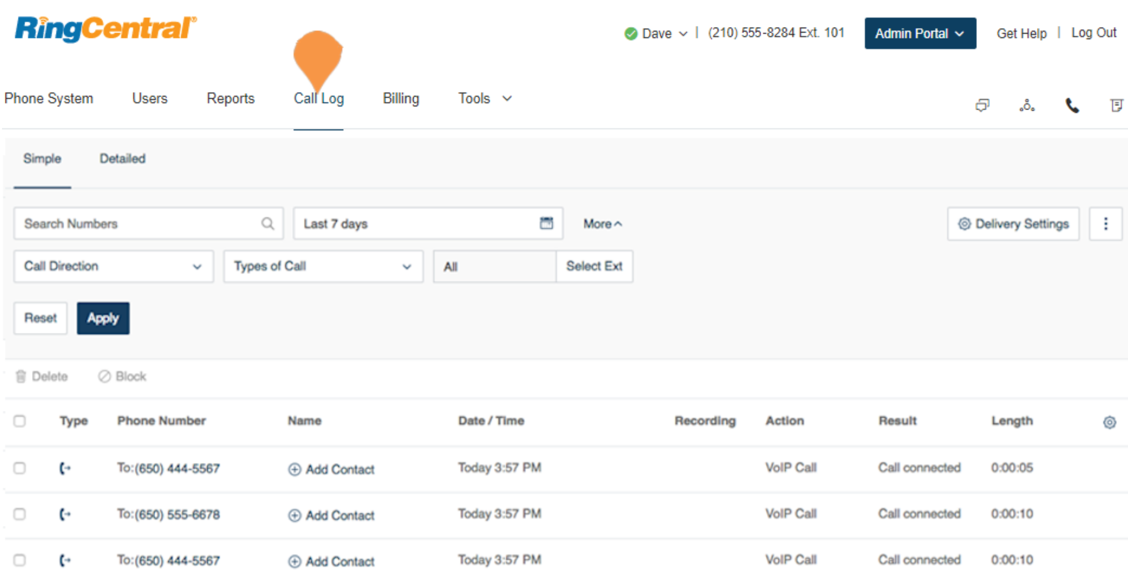
Missed Call

Listen to a call recording

Administrators can enable the bad call quality indicator for a given account. After this feature is enabled, the **Quality** column is displayed. In the Quality column you will see thumbs down icons for calls that were connected. Click the white thumbs down if you were not satisfied with the quality of a call.

Click to mark as a bad call

Marked as a bad call



Billing

Billing

The **Billing** tab leads to menus for managing your Service Plan, Payment Method, International Calling, Meetings (including licenses), Device Orders, Call Center SIP Interconnect (inContact Interconnect) licenses, and Cost Center Management. View and edit your service plan, payment information, international calling plans, and cost center codes here.

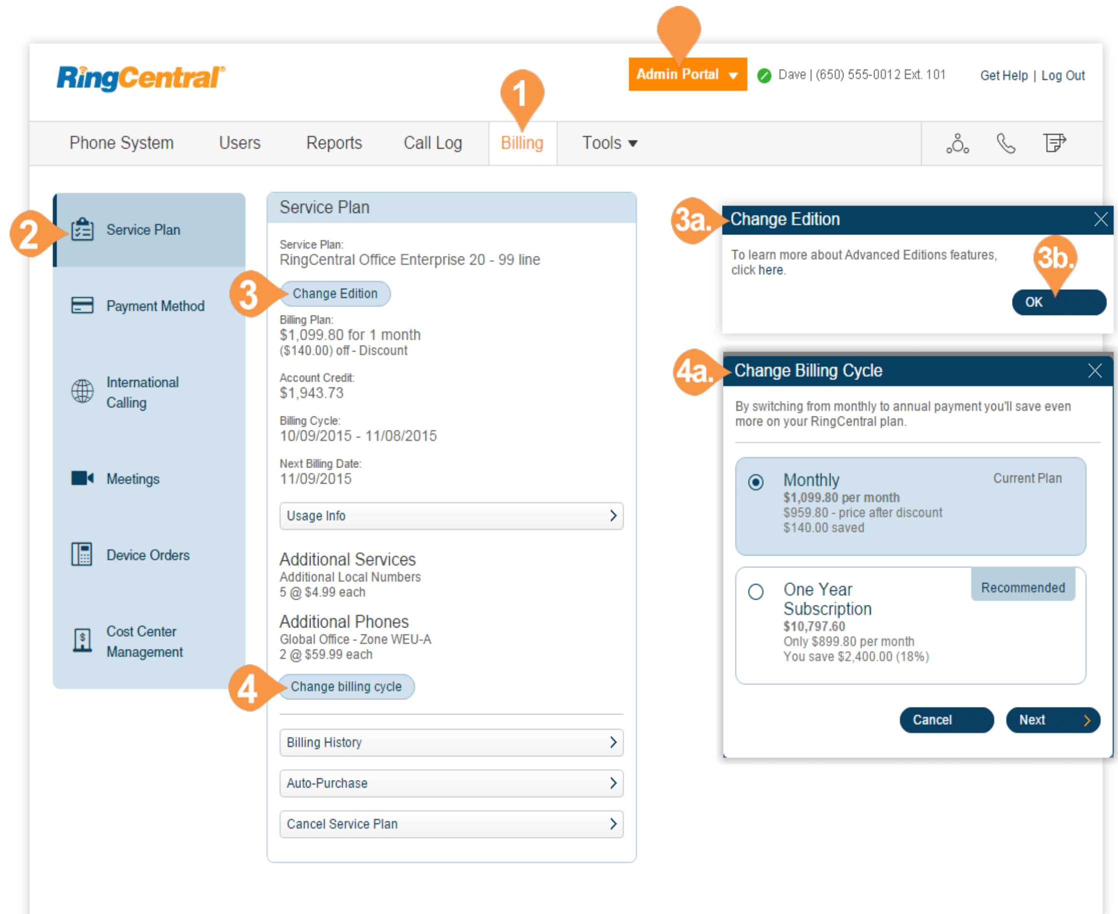
If enabled for your account through RingCentral support, you will also see a **Professional Services** menu item in the **Billing** tab.

Note: Billing is an administrator function only. This option is not available to standard users.

Service Plan

View or change your service plan

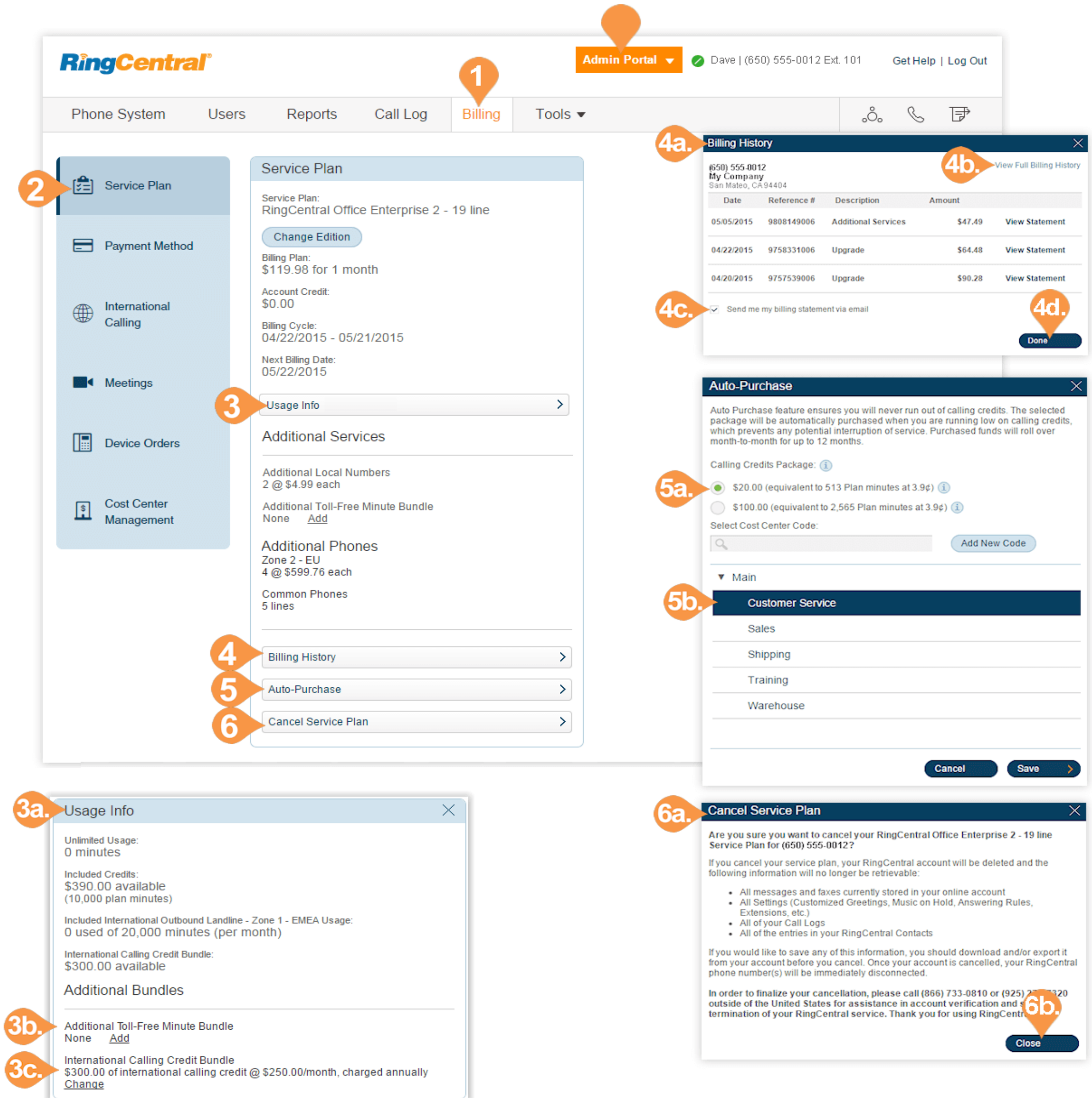
1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Service Plan** to view your plan details.
3. Click **Change Edition.**
   a. Follow the instructions on the pop-up to learn more about different editions.
   b. Click **OK**.
4. Click **Change Billing Cycle**.
   a. View options for monthly or yearly subscriptions.
   b. Select the button next to the plan you'd like.
   c. Click **Next**.
   d. Follow the purchase flow.



View Service Plan Options

To view options for billing history and auto-purchase:

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Service Plan**.
3. Click **Usage Info**.
   a. View your **Usage Info**.
   b. Click **Add** if you'd like to add an additional toll-free minute bundle. Select the bundle, click **Next**, and review and confirm.
   c. Click **Change** if you'd like to change your international calling credit bundle. Select the bundle, click **Next**, and review and confirm.
4. Click **Billing History**.
   a. View your **Billing History**.
   b. Click **View Full Billing History** if you'd like to see more details.
   c. Check the box next to **Send me my billing statement via email** to set this option.
   d. Click **Done**.
5. Click **Auto-Purchase**.
   a. Select the **Calling Credits Package** you wish to purchase.
   b. Select the **Cost Center Code** you'd like to use for this purchase.
   c. Click **Save**.
6. Click **Cancel Service Plan**.
   a. If you would like to cancel your service plan, follow the instructions on the pop-up.
   b. Click **Close**.



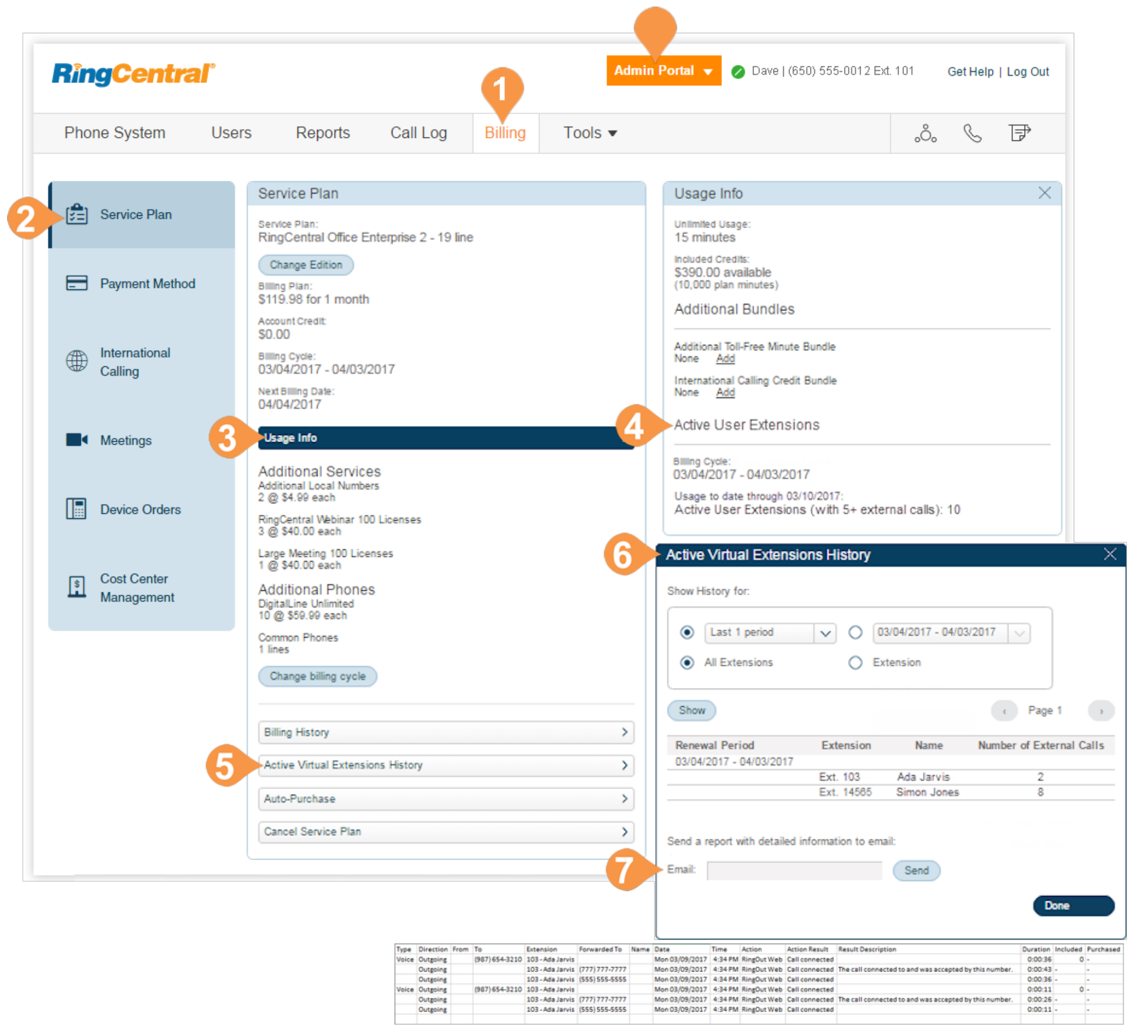
Active User Extensions

A virtual extension is a user extension without an assigned digital line. Virtual extensions forward incoming calls to mobile phones, extensions, or other external numbers and allow for limited outbound dialing. It becomes an Active User Extension if it makes or receives ten or more calls per month (billing cycle).

View Active User Extensions Usage and History

To view the active user extensions in your account:

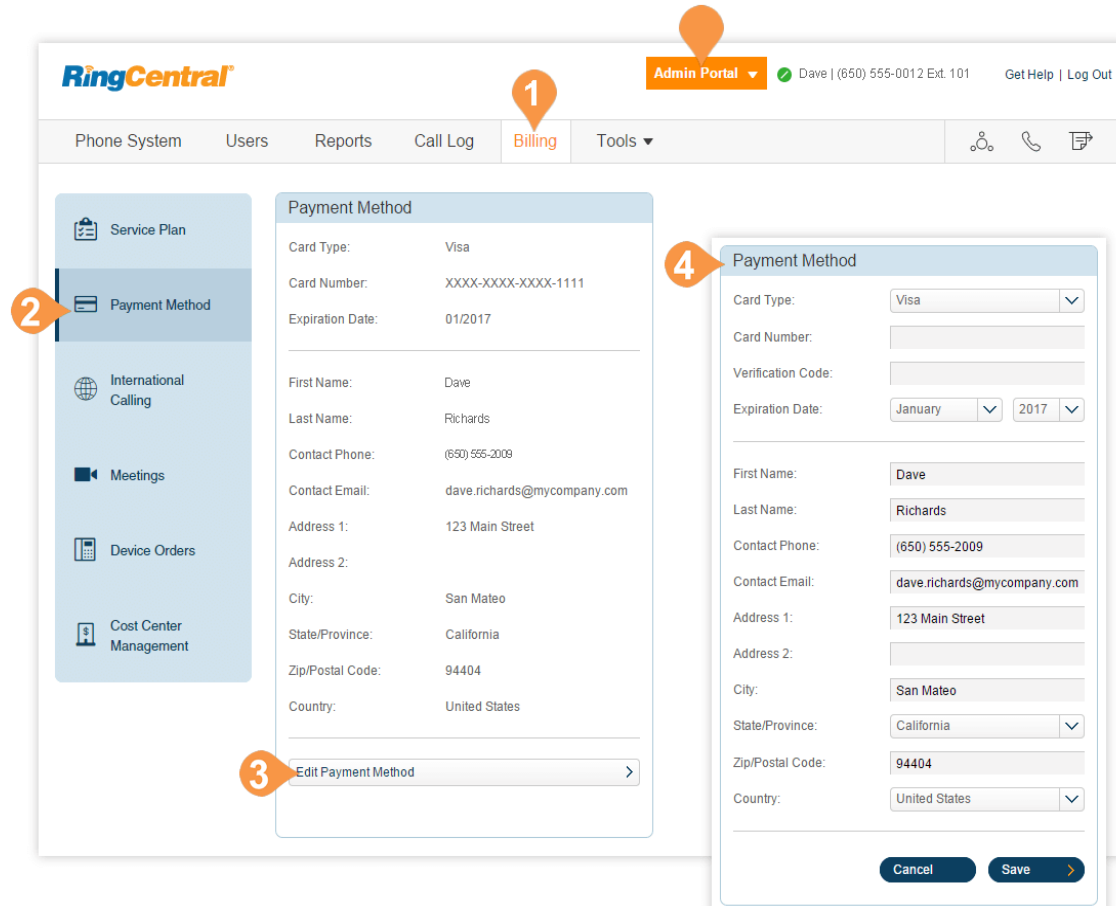
1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Service Plan**.
3. Click **Usage Info**.
4. Review the **Active User Extensions** section for the number of Active User Extensions (those extensions with ten or more external calls in the current the billing cycle).
5. In the **Service Plan** pane, click **Active Virtual Extensions History** to view the number of external calls each active user has made or received within a specified period of time.
6. In **Active Virtual Extensions History**, specify the search parameters and click **Show**.
7. Enter an email address and click **Send** to email yourself the report containing extension level calling data by account.



Payment Method

The Payment Method contains the credit card information attached to the RingCentral account.

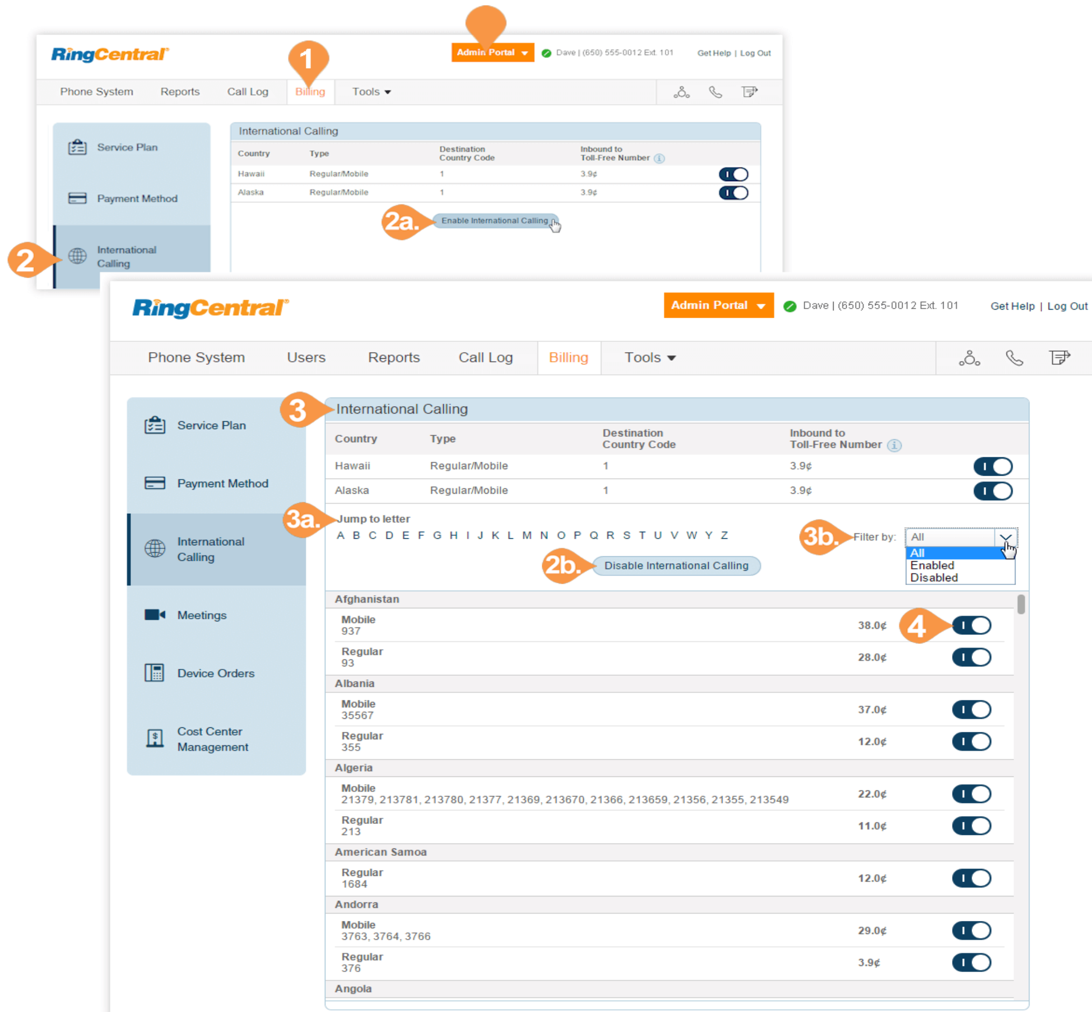
1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Payment Method**.
3. View your **Payment Method** details.
4. Click **Edit Payment Method**.
5. Edit your **Payment Method** information.
6. Click **Save**.



International Calling

To enable, disable, and view international calling rates:

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **International Calling.**
   - c. If International Calling is not enabled, click **Enable International Calling** to enable it.
   - d. If International Calling is enabled, you can disable international calling completely by clicking **Disable International Calling**.
3. View the countries international calling is available to and the price for each country.
   - a. Use the alphabet at the top of the screen to jump to a list of countries. All countries start with a specific letter.
   - b. Sort by Countries that are enabled or disabled by using the drop-down menu.
4. Turn calling to a specific country on or off by clicking the switch to the right of that country. You will see a white, vertical line with a navy blue background when the switch is in the “on” position as shown in the image on the right.



Professional Services

RingCentral Professional Services can help you optimize your investment in RingCentral with a portfolio of services. The Professional Services feature in your online account is an on-demand feature that can be enabled to allow you to manage professional services licenses. When enabled for your account, you can view a summary of your professional services licenses, and purchase or remove licenses.

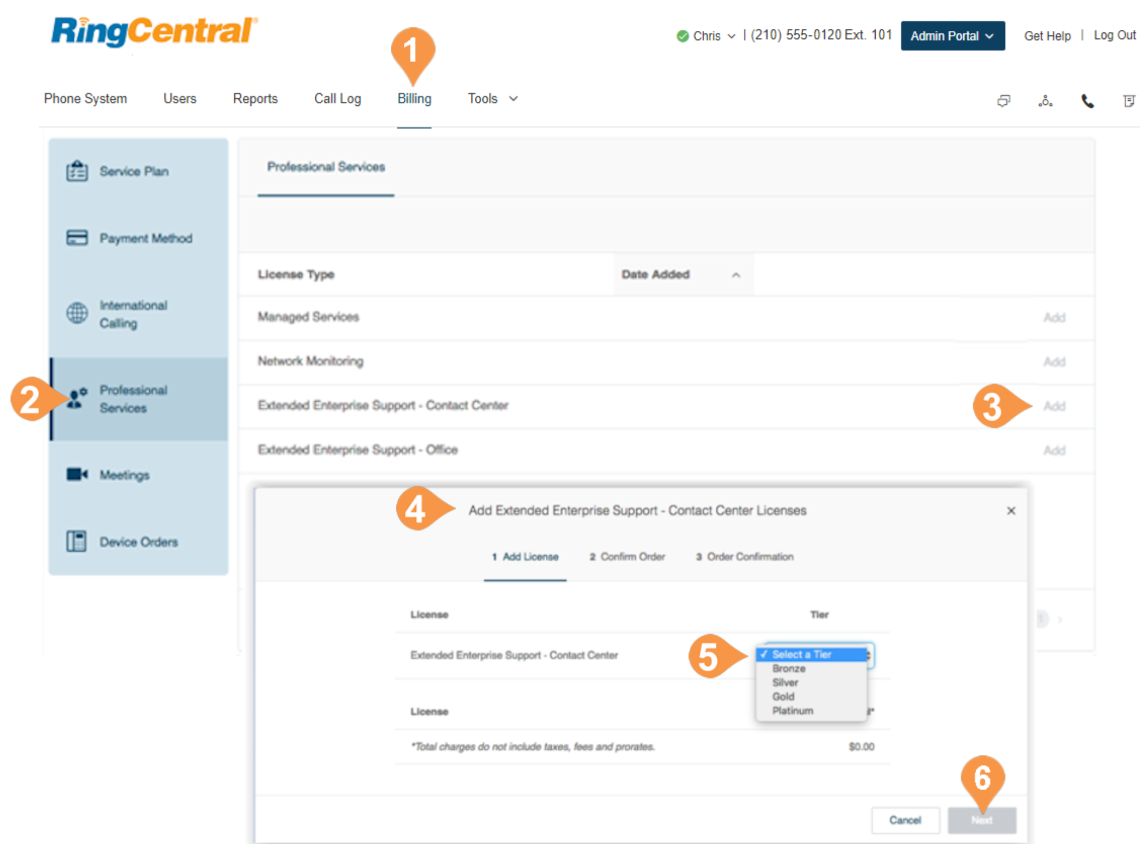
Professional services include:

- **Managed Services -** a recurring service to manage moves, adds, and changes to your account.
- **Network Monitoring -** a recurring service to provide proactive network monitoring and notifications for your account.
- **Extended Enterprise Support -** premium support services with dedicated technical account manager and customer success manager, and expedited technical support. Can be enabled for RingCentral Office and RingCentral Contact Center.

To view or add your professional services licenses:

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Professional Services**. Your existing licenses are displayed.
3. To add a type of license, click **Add** in the column.
4. The license you are adding is displayed.
5. For support services, select the **Tier**.
6. Click **Next**.
7. The order confirmation information is displayed.
8. Click **Next** and complete the transaction.

For more information about professional services, see the RingCentral Professional Services datasheet.



Meetings

The Meetings sections allows you to manage RingCentral Meetings, including managing licenses, downloading software, adding and viewing rooms, and managing settings.

Add Large Meeting Licenses

RingCentral Meetings is available for free with any RingCentral Office edition: Standard edition supports up to 4 participants per meeting, Premium edition supports up to 100 participants per meeting and Ultimate edition supports up to 200 participants.

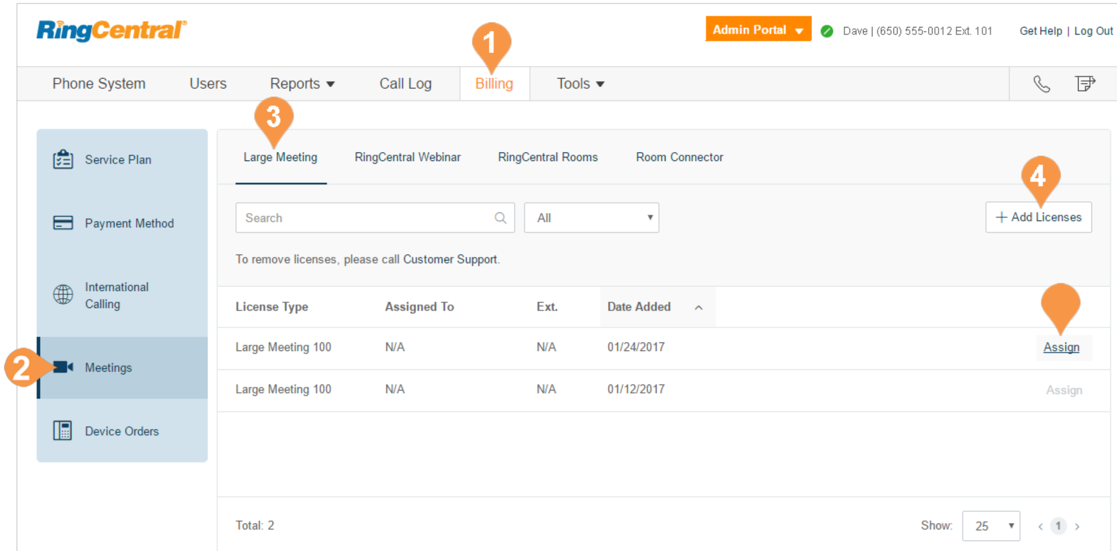
An additional Large Meeting add-on is available for Premium and Ultimate edition to extend meeting capacity with up to 500 participants. You can add and assign a Large Meeting license to a user who has a need for hosting larger meetings.

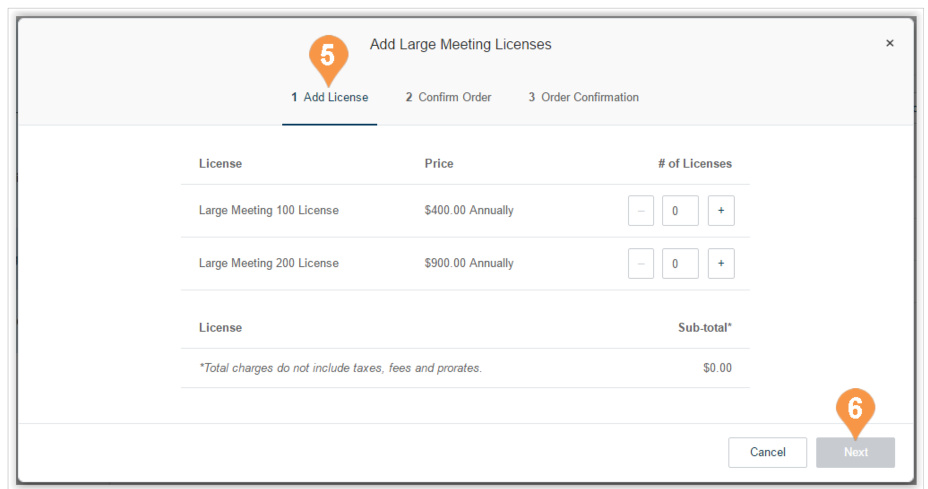
Add a Large Meeting license

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Meetings**.
3. Click **Large Meetings** Your existing licenses are displayed.
4. Click **Add Licenses**.
5. Enter the number of each type of license.
6. Click **Next**.
7. The purchase information is displayed.
8. Click **Next** and complete the transaction.

To remove licenses, call Customer Support.

To assign or reassign a license, click **Assign** and select a user.





Add RingCentral Webinar Licenses

RingCentral Webinar, an add-on for RingCentral Meetings, lets you host virtual events and online training with up to 10,000 attendees. Attendees can join from desktops, tablets, and smart devices, or from a telepresence system.

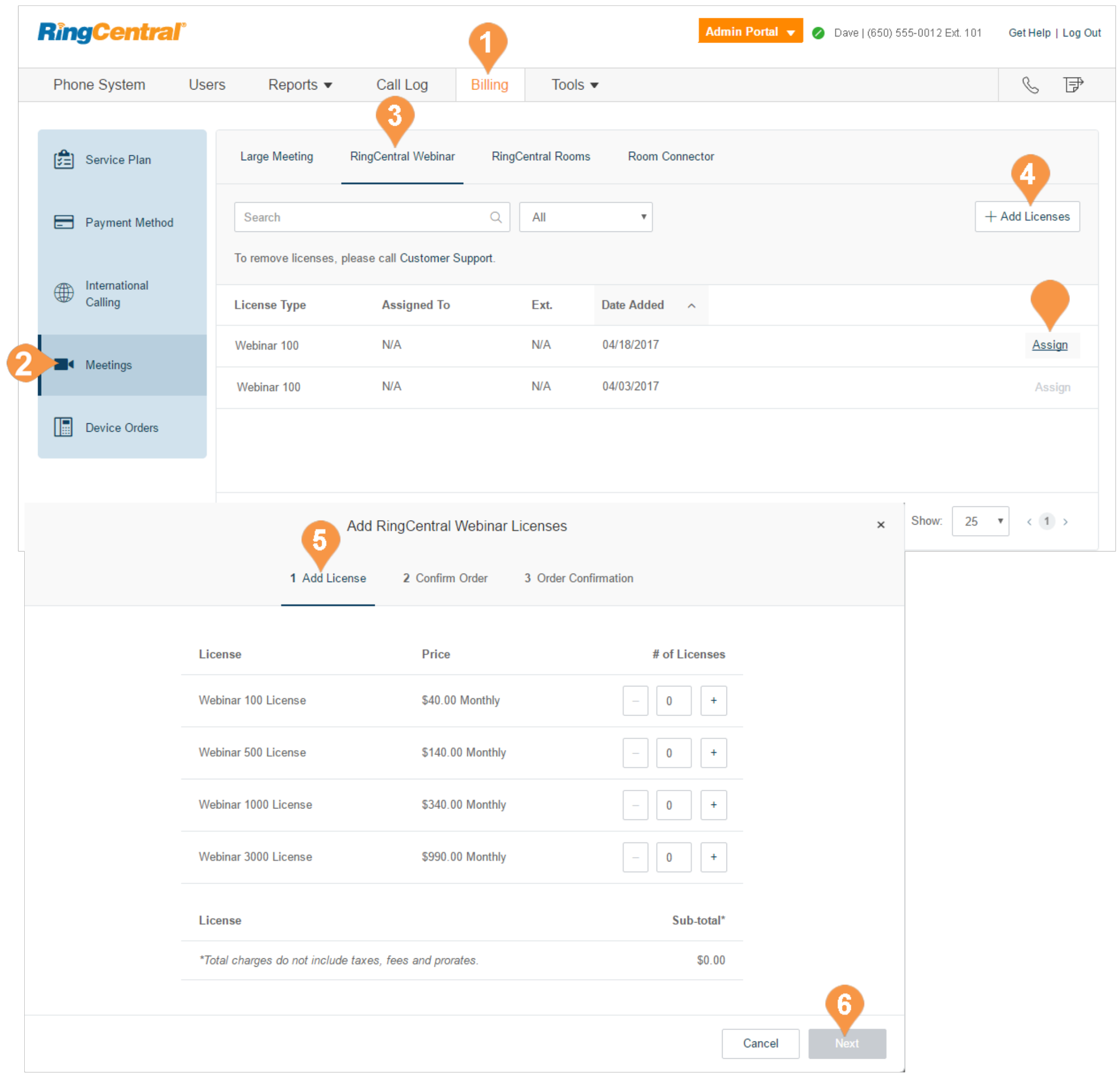
RingCentral Webinar is a user-based license for users who need to host online events. It is not an account-wide license.

Add a RingCentral Webinar License

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Meetings**.
3. Click **RingCentral Webinar** Your existing licenses are displayed.
4. Click **Add Licenses**.
5. Enter the number of each type of license.
6. Click **Next**.
7. The purchase information is displayed.
8. Click **Next** and complete the transaction.

To remove licenses, call Customer Support.

To assign or reassign a license, click **Assign** and select a user.



Add RingCentral Rooms Licenses

RingCentral Rooms is a cloud-based HD video conferencing solution for every conference room. RingCentral Rooms transforms your conference room spaces into dynamically enabled web conferencing destinations. You can easily set up, hold, and manage web conferences with the highest quality “in-room” experience.

Google and Microsoft Office 365™/Exchange® are integrated for simple conference scheduling and calendar synchronization. RingCentral Rooms automatically displays all of your scheduled meetings for the specific conference room.

RingCentral Room Connector enables your existing H.323/SIP room systems to communicate with other meeting participants from desktops, tablets, and mobile devices. Room Connector works with a wide range of video endpoints from Polycom, Cisco, Lifesize and more.

RingCentral Rooms requires a RingCentral Office subscription and add-on licenses for the RingCentral Rooms conference rooms.

You set up Rooms and Room Connector licenses, and Rooms conference rooms in the Admin Portal. The management tasks for RingCentral Rooms and Room Connector include: Add RingCentral Rooms Licenses

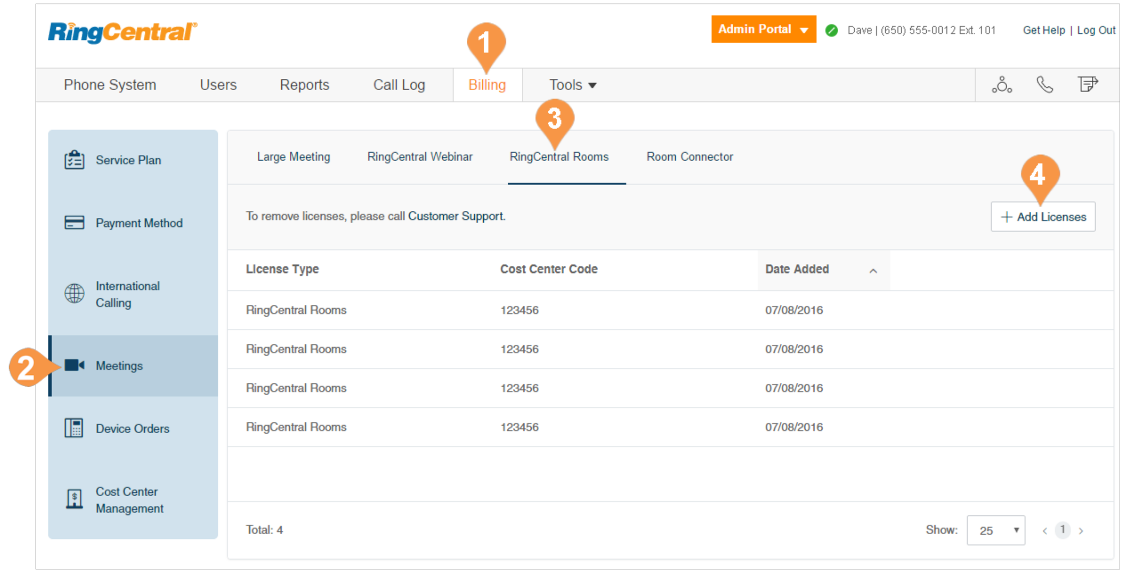
- Add RingCentral Room Connector Licenses
- Download RingCentral Rooms Software
- Add RingCentral Rooms for meeting spaces
- View Rooms in Your Account
- Manage RingCentral Rooms General Settings

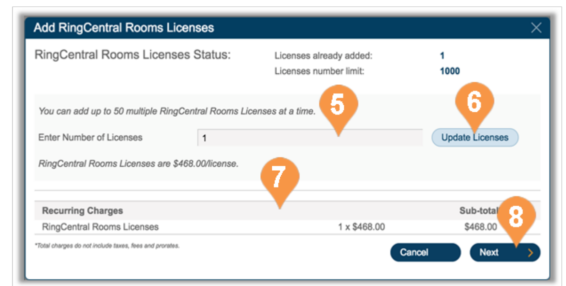
Add a RingCentral Rooms license

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Meetings**.
3. Click **RingCentral Rooms**. Your existing licenses are displayed.
4. Click **Add Licenses**.
5. Enter the number of licenses.*
6. Click **Add Licenses**.
7. The purchase information is displayed.
8. Click **Next** and complete the transaction.

For more information on managing and configuring RingCentral Rooms, see “RingCentral Meetings” on page 243.

*You can add a maximum of 50 RingCentral Rooms licenses at a time. If you plan to purchase more than 50 licenses in bulk, you must break the purchase into several orders.





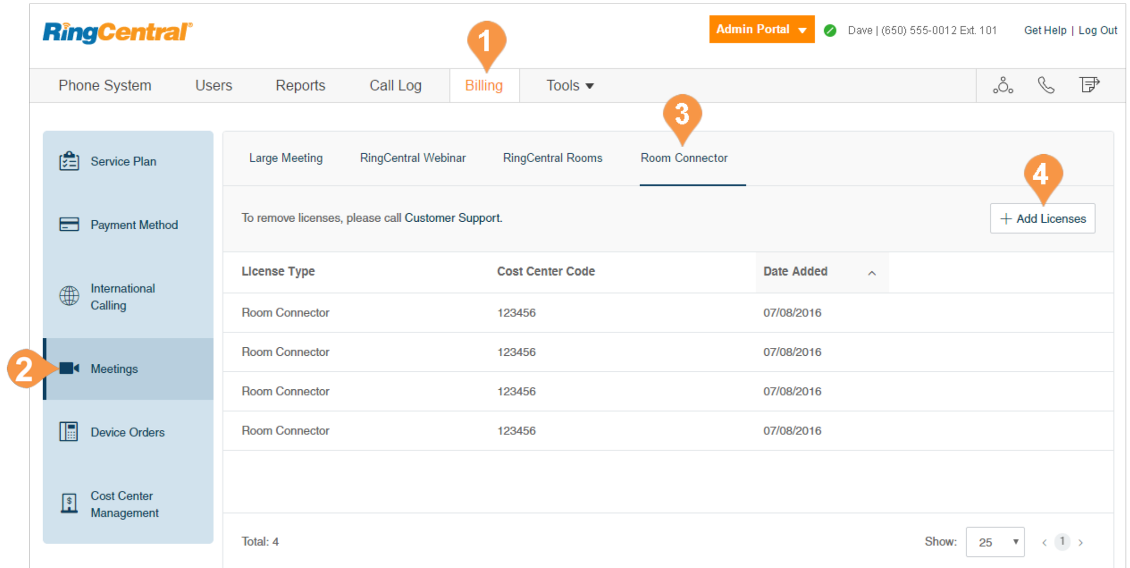
Add RingCentral Room Connector Licenses

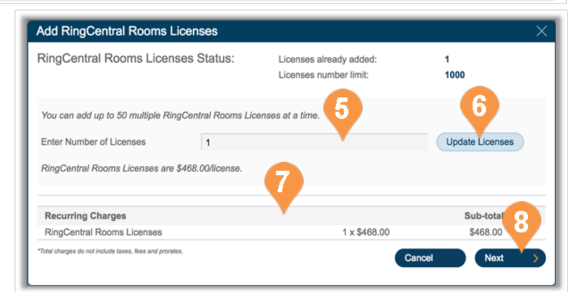
RingCentral Room Connector requires a RingCentral Office subscription and add-on licenses for the RingCentral Room Connector conference rooms.

To add a RingCentral Room Connector license:

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Meetings**.
3. Click **Room Connector** Your existing licenses are displayed.
4. Click **Add Licenses**.
5. Enter the number of licenses.*
6. Click **Add Licenses**.
7. The purchase information is displayed.
8. Click **Next** and complete the transaction.

For more information on RingCentral Room Connector, see the knowledgebase article, Getting Started with RingCentral Room Connector.



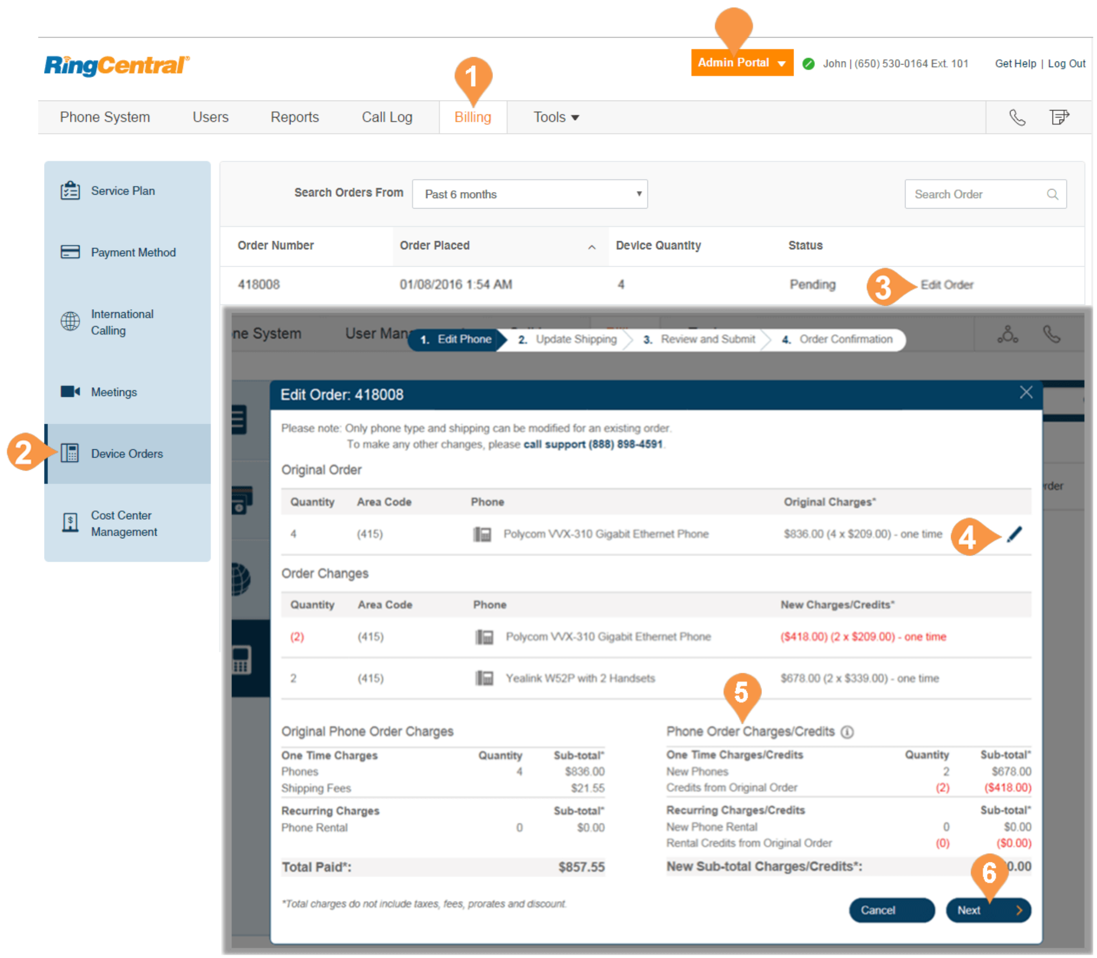


Manage Device Orders

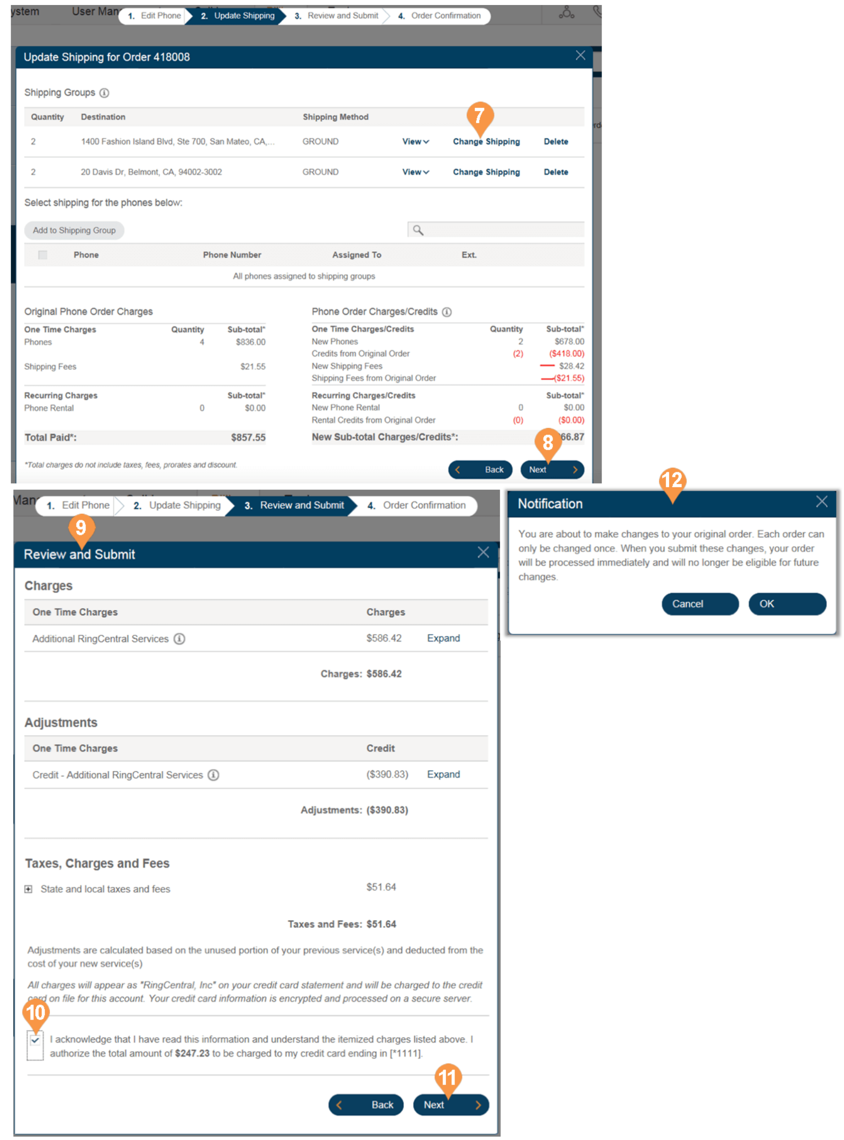
The Device Orders management feature allows you to view past orders and edit those device orders that are in *pending* status to change the devices ordered, or the shipping address.

You can edit those orders during the hold period that occurs from one to four hours after your initial order placement. An order can only be modified a single time, after which is it submitted immediately to the distributor for processing.

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Device Orders**.
3. Click **Edit Order** on a pending order.
4. Select the pencil icon to make changes. Select the items that you want to change and change the devices (one or many) to the desired device.
5. Once completed, new charges (or credits) are displayed.
6. Click **Next**.

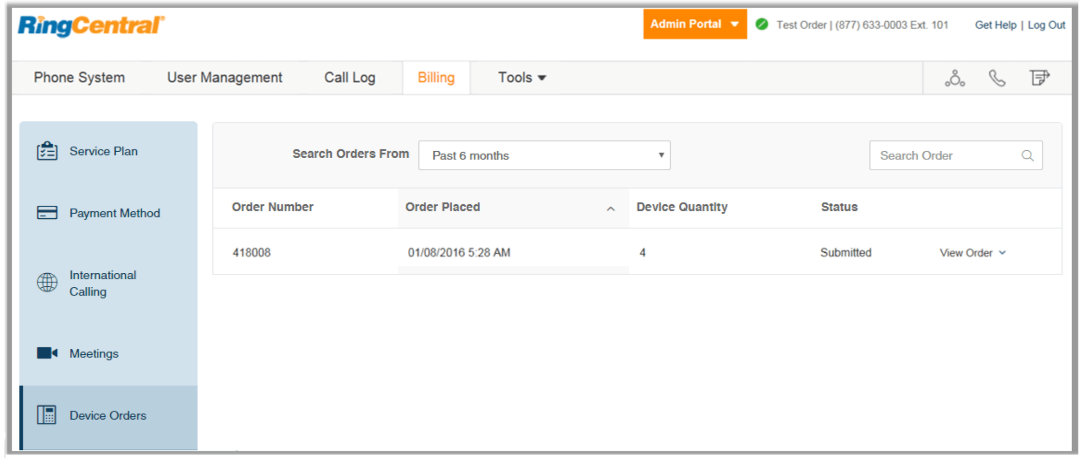


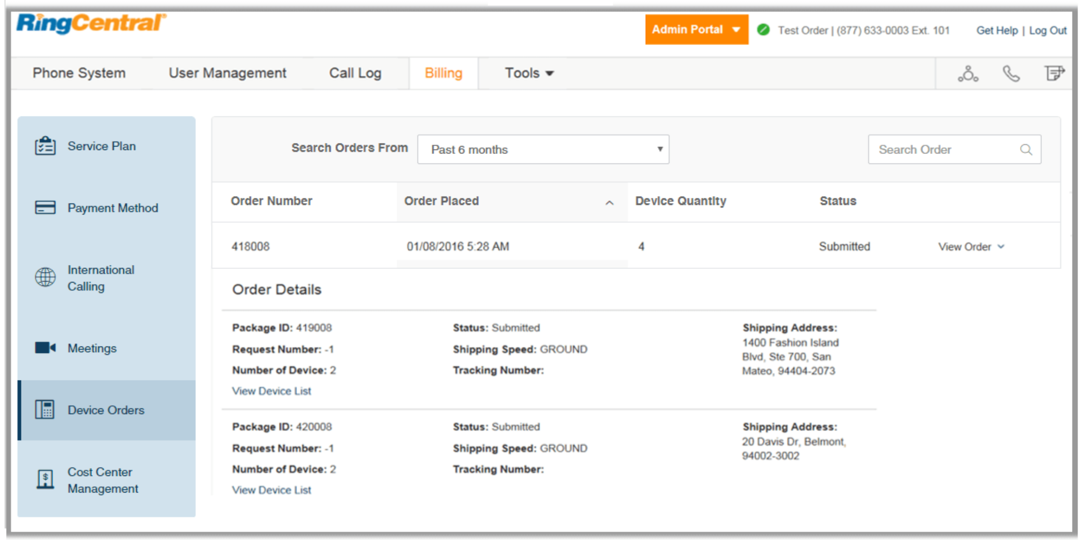
7. Change the shipping address, if desired.
8. Click **Next**.
9. Review the changes.
10. Check to indicate your acknowledgment of the sales conditions and understanding of the new charges.
11. Click **Next**.
12. Confirm that once submitted, you can no longer update the order.



The order update is complete, and the order status is changed to *Submitted*.

You can click **View Order** to see the final order.



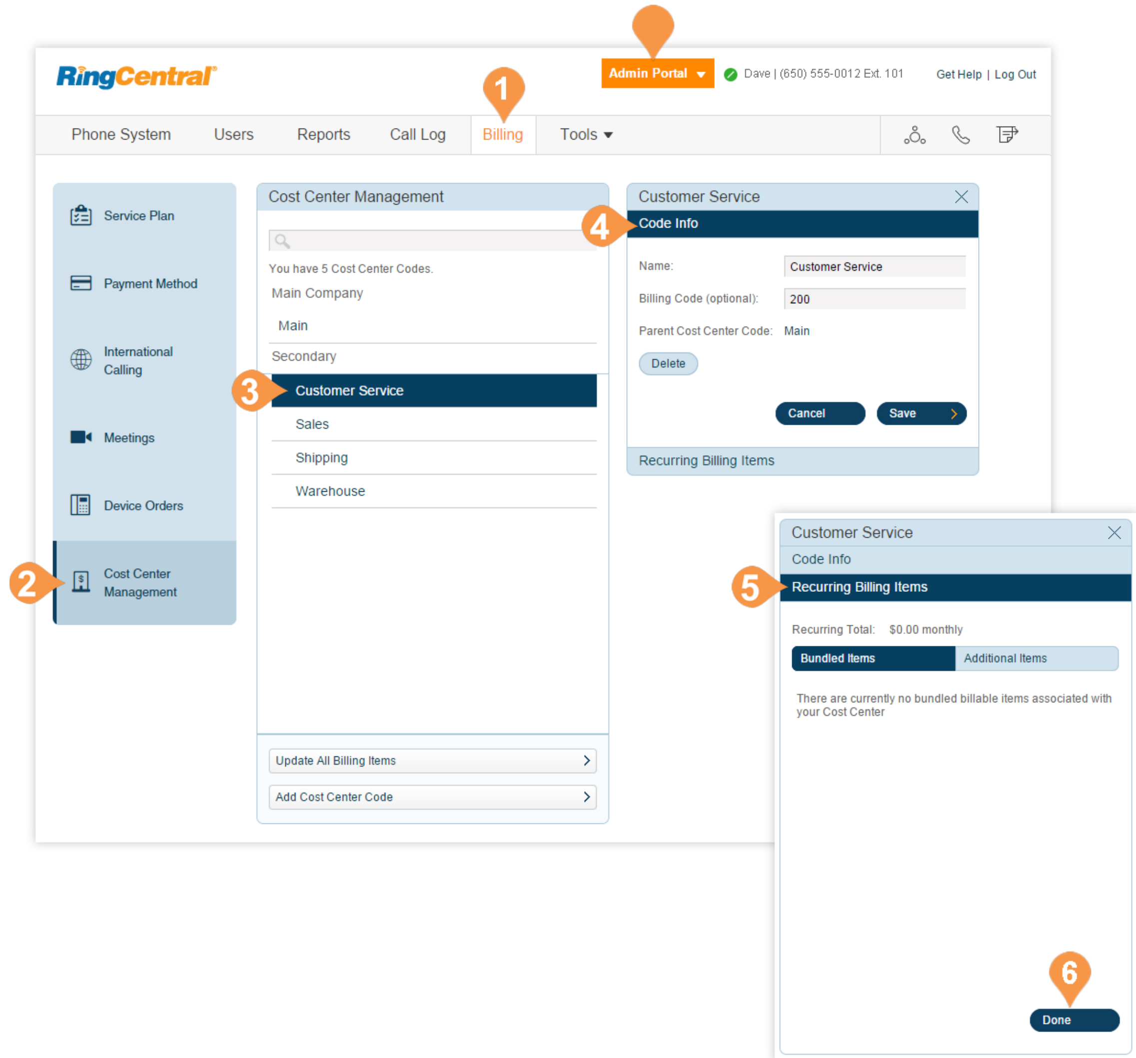


Cost Center Management*

The Cost Center Management feature allows you to manage and monitor expenses for groups or individuals. Administrators can assign purchases of RingCentral services to a department or an individual with cost center codes. Each transaction can be assigned to a specific cost center code that you have created. You can create cost center codes while you are in process or upload predefined codes.

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Cost Center Management**.
3. Select an existing **Cost Center Code** (Customer Service in this example).If you do not have any cost center codes, see the next page on how to create one.
4. Click **Code Info** to edit the Name and Billing Code or Delete the code.
5. Click **Recurring Billing Items** to view Bundled Items or any Additional Items that have been scheduled as recurring billing items for this cost center code.

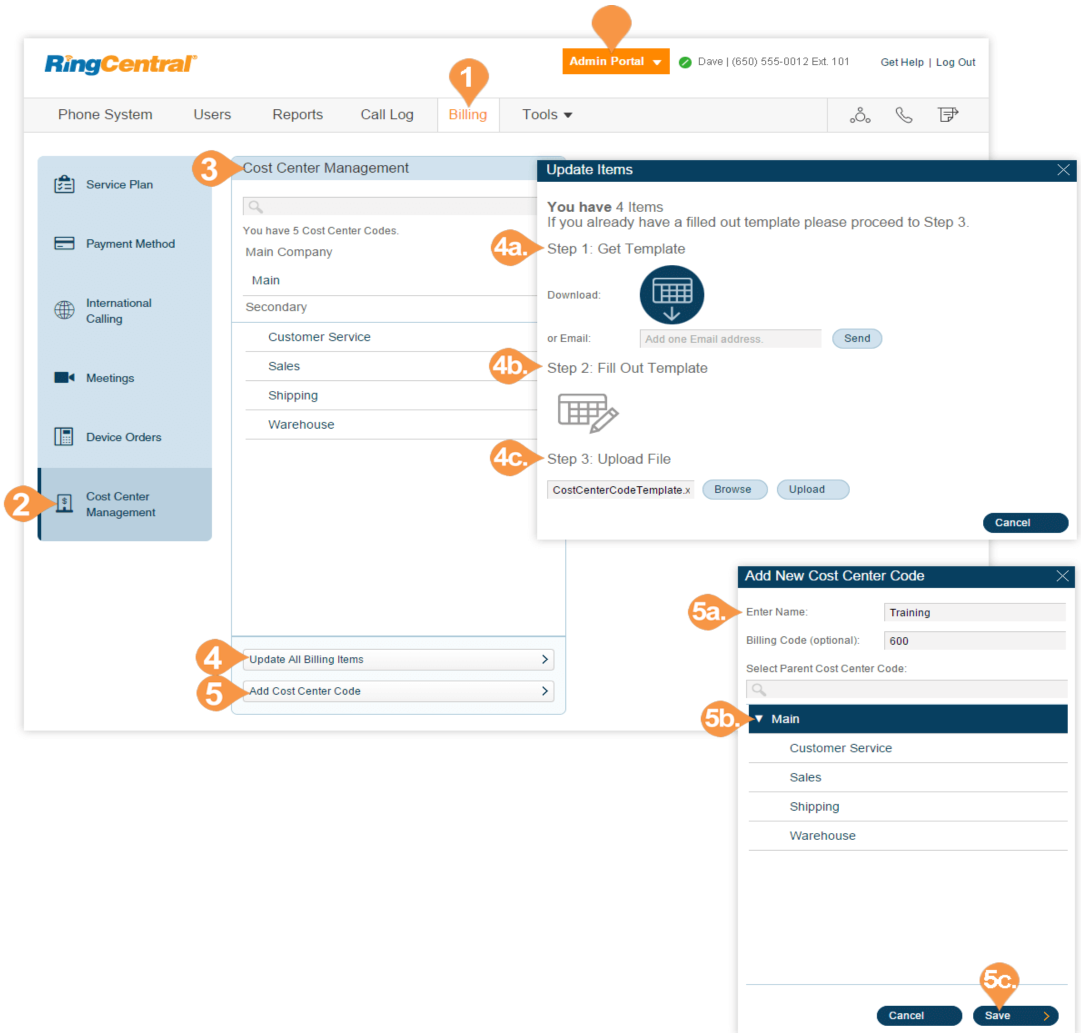
*To enable the Cost Center Management feature, contact your RingCentral account manager.



Update and Add Cost Center Codes

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Cost Center Management**.
3. View your current **Cost Center Codes**..
4. Click **Update All Billing Items**.
    a. Download the template for updating your billing items
    b. Follow the instructions on the downloaded template and fill out the spreadsheet.
    c. Upload your completed spreadsheet to update your billing items.
5. Click **Add Cost Center Codes**.
    a. Enter a name for your new Cost Center Code and a code if you'd like.
    b. Select a **Parent Cost Center Code**.
    c. Click **Save**.

Note: Administrators can also add a Cost Center Code while processing a transaction. When the administrator is asked to assign a purchase to a Cost Center Code, there will be a button to **Add New Code** the administrator can click.



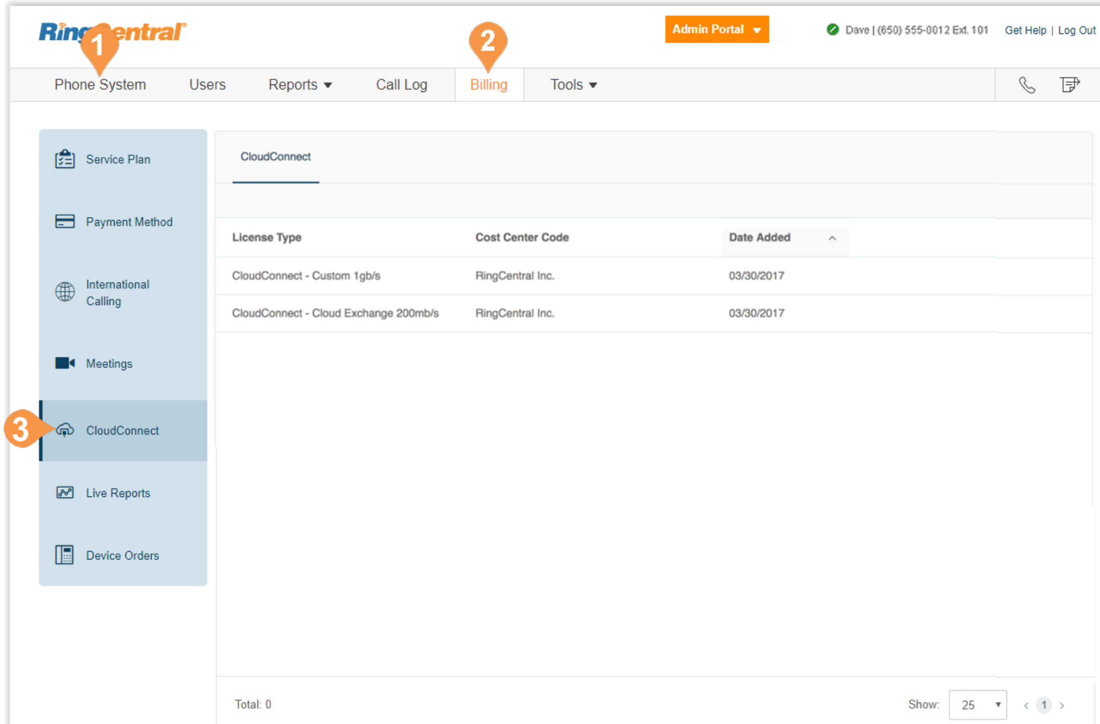
CloudConnect

CloudConnect allows a customer to connect to the RingCentral UCaaS cloud infrastructure by using a dedicated link with high quality of service.

Once purchased and enabled, admins can view information about licenses. You'll be able to read a listing of the license types, the cost center codes, and the date the license was added to the system.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Billing**.
3. Click **CloudConnect**.

This feature is available on an on-demand basis. Contact RingCentral Support to discuss the requirements for enabling this feature for your account.



Live Reports

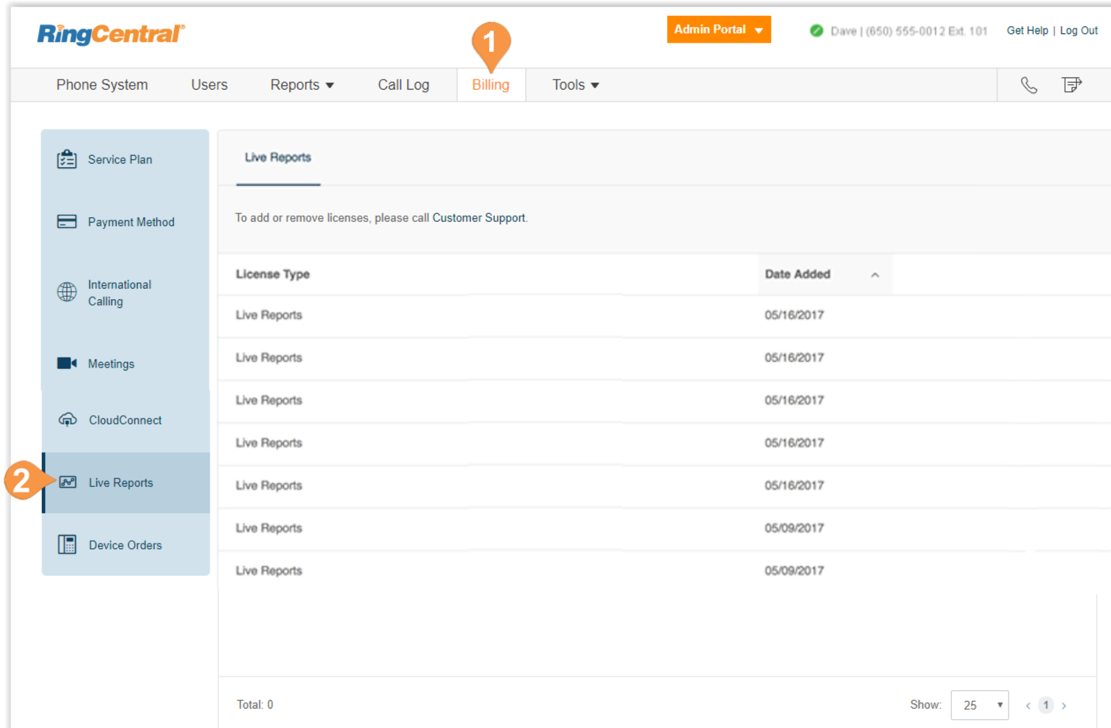
Live Reports provides access for users to build dashboards and reports to show data on inbound and outbound calls in close to real time.

When Live Reports is enabled for your account, users with Live Reports permission has access to Live ReportsYou can track the number of RingCentral Live Reports licenses billed to your account.

To change the number of licenses on your account, you must call RingCentral Customer Support.

1. From the **Admin Portal**, click **Billing**.
2. Click **Live Reports**.

This feature is available on an on-demand basis. Contact RingCentral Support to discuss the requirements for enabling this feature for your account.

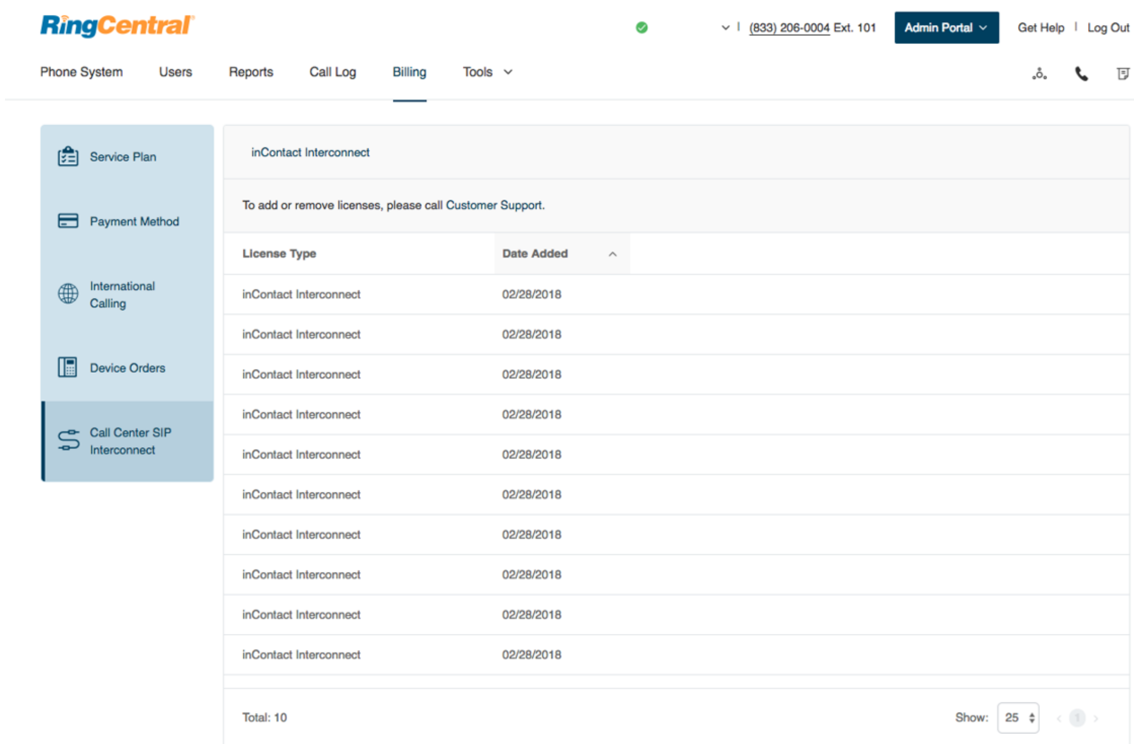


InContact Interconnect Licenses

The Call Center SIP Interconnect section allows you to view your licenses for a SIP interconnect to RingCentral. This section applies only to RingCentral Office customers (for all RingCentral Office tiers) who have directly purchased their contact center from NICE inContact.

The SIP interconnect allows regionalized agent leg routing, provides high voice quality for on-net agent leg calls, and enables safe transfers to RingCentral Office extensions.

Enabling the SIP interconnect requires one RingCentral interconnect license per interconnect agent. To enable this feature, contact your sales representative.



Tools

Tools

In the Admin Portal, the **Tools** menu lists many important features for your company's phone system.

Meetings includes tools for RingCentral Meetings, such as software download, configuring settings, setting up RingCentral Rooms for one-touch meeting and calendar integration, and viewing reports for RingCentral Meetings. To learn more about this, see, "Introduction to Managing Meetings" on page 244.

Archiver lets you securely save your messages and recorded calls automatically and easily search the stored data at any time from within your SFTP or Dropbox cloud storage account to quickly retrieve the records. To learn more about this, see "Archiver" on page 221.

Appearance lets you add your company logo to your RingCentral online account. You can also link your company logo to your company's website for smoother navigation. To learn more about this, see "Appearance" on page 222.

Audit Trail lets you find and capture changes made by users that affect system events, configuration, and user accounts. To learn more about this, see "Audit Trail" on page 238.

Session Timeout lets you configure a session timeout for all users. To learn more about this, see"Session Timeout" on page 223

Hot Desk Session Timeout specifies the time period when guest users will be logged out from phone endpoints, or allows you to configure no timeout. To learn more about this, see "Set the Hot Desking Session Timeout" on page 148.

1 Not available for one-line accounts.
2 Active Directory available for Office Premium and Ultimate users only
3 Available for US users only

Single Sign-On* lets employees in a company access multiple applications with one set of credentials. RingCentral SSO supports the Kerberos network authentication service (on Windows), as well as integrates with Google SSO. To learn more about this, see "Single Sign-on*" on page 226.

Directory Integration** see allows lets you automatically provision users from your Active Directory or G Suite corporate directory into RingCentral. To learn more about this, see "Directory Integration" on page 229.

HIPAA Conduit Setting*** ensures customer calls and messages are secure with encryption in transit and at rest, along with other features, protecting patient data and guarding against unauthorized access to protected health information.To learn more about this, see "HIPAA Conduit Setting*" on page 230.

Multi-Site Settings[4] allows you to configure and manage your different office locations under one account. To learn more about this, see "Appendix C: Multi-Account Access" on page 288.

Note: Users in Canada will see the option **Enable Free Line for All Users** in the **Tools** menu (this option is enabled automatically for US users). The Free Desktop App line is a free additional outbound line that may be assigned to user's Desktop App enabling you to allow users to make outbound calls. The Free Desktop App line may incur taxes and fees.

Archiver

RingCentral Archiver makes archiving important communications data simple and convenient through the seamless integration of SFTP or Dropbox cloud storage with your RingCentral service.

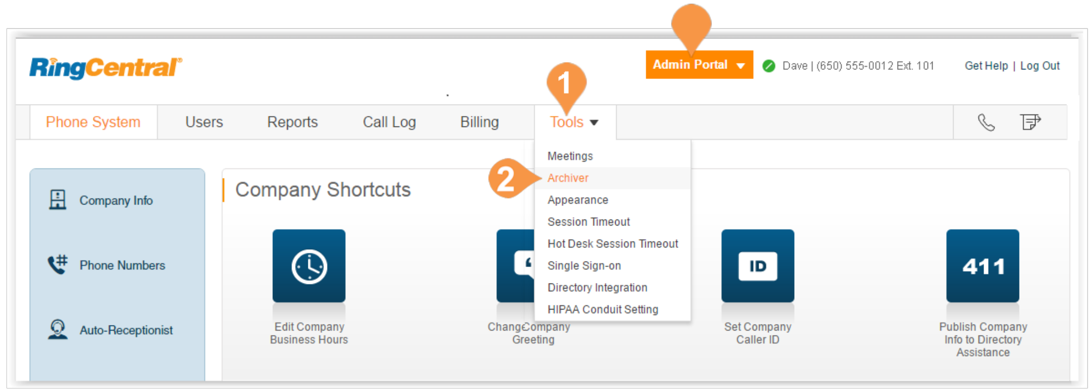
With RingCentral Archiver, you can securely save your messages and recorded calls automatically and easily search the stored data at any time from within your Dropbox account to quickly retrieve the records you want.

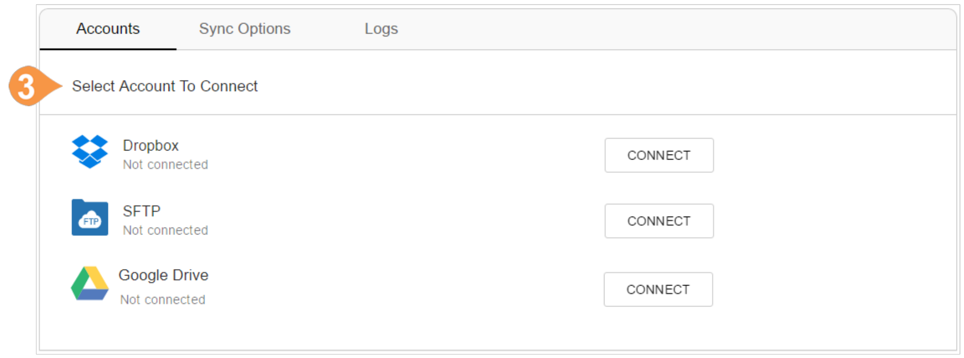
Configure RingCentral Archiver

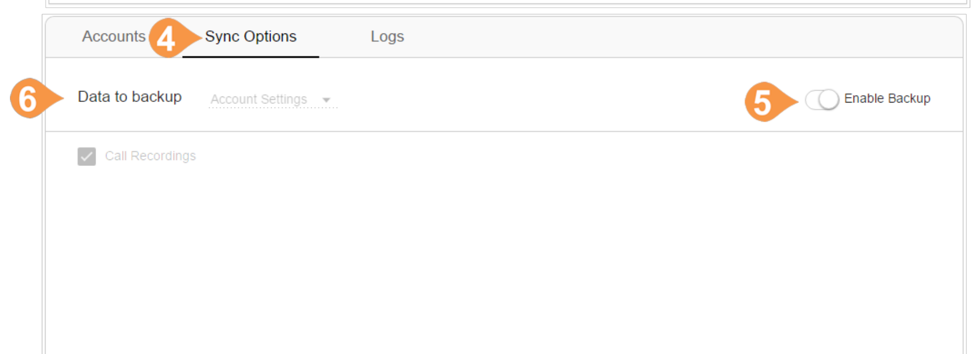
1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Archiver** and log in to the tool with your RingCentral or Salesforce credentials.
3. The Accounts tab displays the connection status of your accounts. Click **Connect** and enter the credentials to connect RingCentral to your Dropbox or SFTP account.
4. Click **Sync Options**.
5. When connected to the Dropbox account, you can enable or disable data backup from RingCentral to Dropbox or SFTP by selecting **Enable Backup**.

   RingCentral Archiver will run the job on an hourly basis and archive to Dropbox or SFTP all of the extensions' call recordings generated within the hour before last Archiver job run.
6. Select the types of **Data to backup**. By default, Call Recordings are backed up for admins and users. Users can select for their own extensions whether to backup Call Recordings, Voice Mails, SMS and/or Fax.

For more information on using the RingCentral Archiver tool, see the RingCentral for Archiver User Guide.





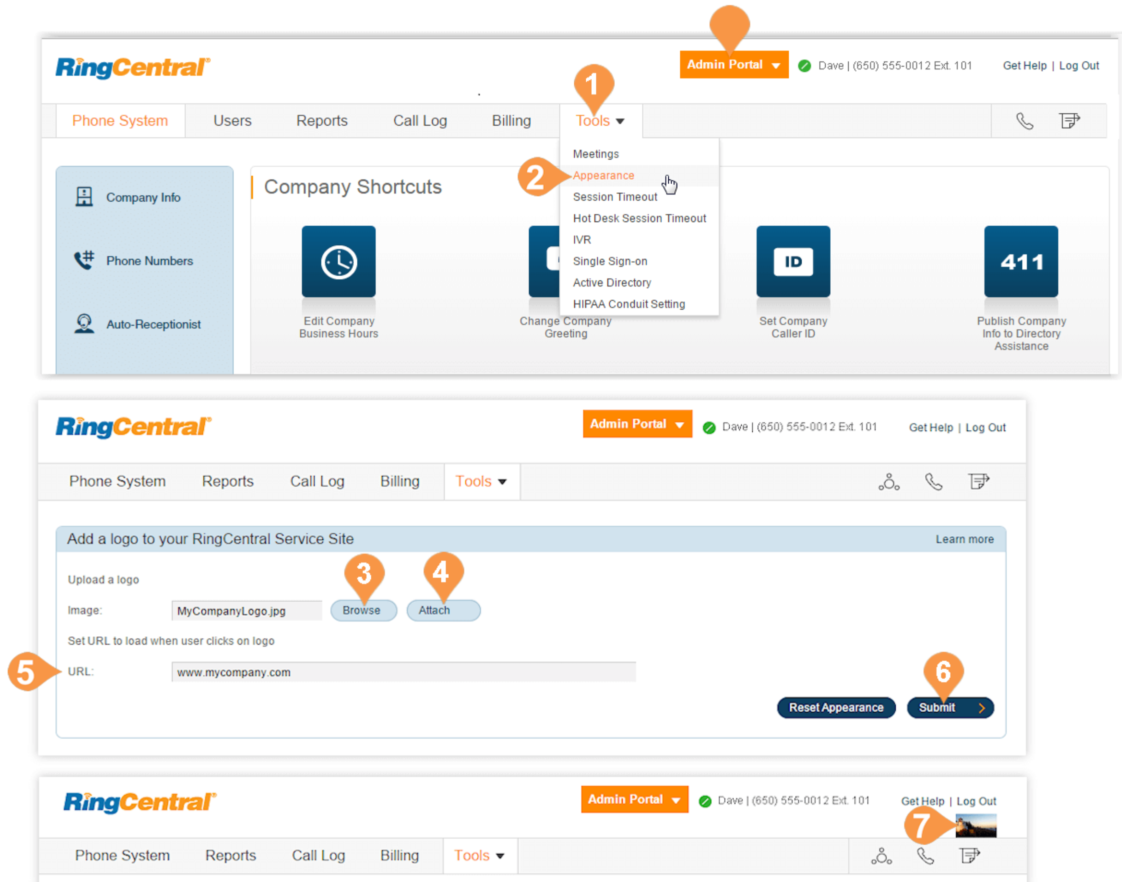


Appearance

Add your company logo to your RingCentral online account for a custom look. Take one step further and link your company logo to your company's website for easy navigation.

To upload and link an image:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Appearance**.
3. Click **Browse** to browse your computer for an image to upload and select the file you want to use.
4. Click **Attach**.
5. Enter the URL that will be opened when a user clicks on your image.
6. Click **Submit**.
7. View your logo in the upper-right corner of your online account and test the URL by clicking on the image.

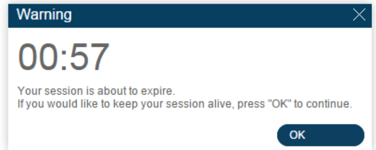


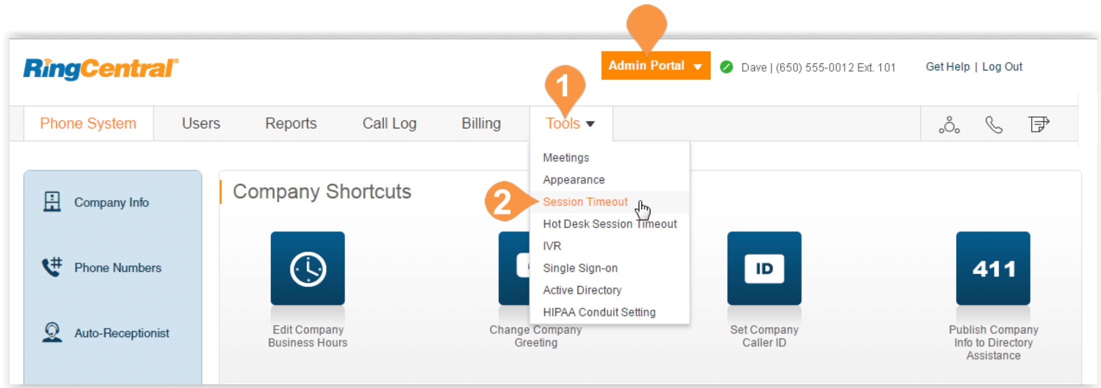
Session Timeout

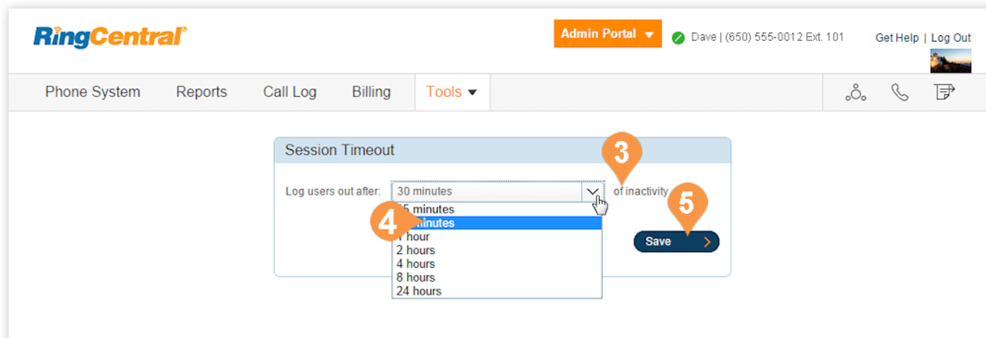
Configure a session timeout for all users on your account. If a user is inactive for a certain period of time, a warning message will appear notifying the user that the session is about to expire. The user can click **OK** to keep the session alive; however, if a user does not click **OK** before the time runs out, the user is logged out of the system and is asked to log in again.

To set a time interval for your phone system's session timeout:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Session Timeout**.
3. Click the drop-down to view a list of time intervals.
4. Select the time interval you would like to use.
5. Click **Save**.







Account Federation

Account Federation* (account linking) is a solution that provides a set of features to support customers who are split across different accounts, and allows account users to find one another across accounts on all endpoints. Large customers may have this split because of a limit of number of users per account, or business needs for having different accounts or billing.

Accounts are linked into a federation that includes:

- The ability to create accounts in multiple tiers, allowing for a mix-and-match of certain feature sets.
- A consolidated company directory.
- Non-metered extension-to-extension and direct number dialing support in the federation.

Before setting up Account Federation:

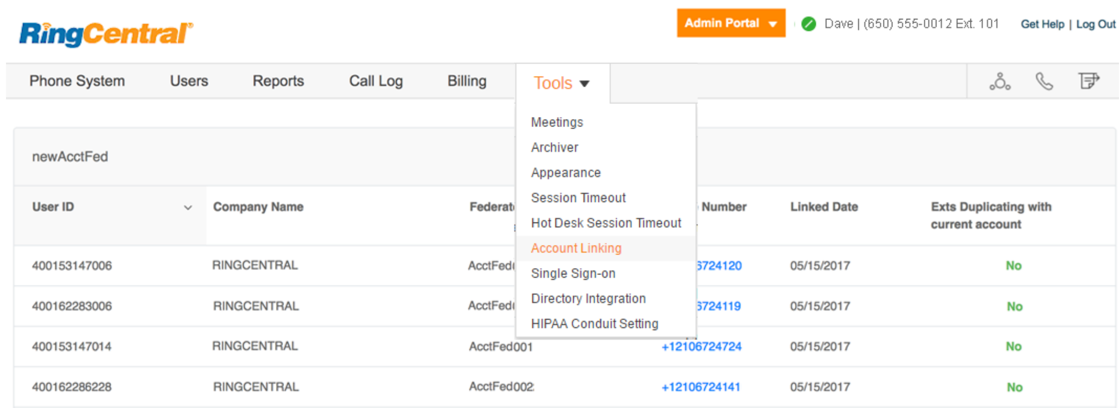
1. Contact RingCentral support to request access to the Account Federation feature. RingCentral support will help evaluate if your account qualifies for the feature.
2. The RingCentral support agent enables the Account Federation feature and adds your linked accounts within your online account.
3. Unique extensions in the federation are preferred. If extensions are not unique, the support agent may be able to update the extensions number of the linked account for you by applying a template.
4. When the Account Federation setup is complete all the account users can find one another across accounts on all endpoints.

*Feature not available for all accounts. Contact RingCentral support to evaluate if your account qualifies for this feature.

Setting up Account Federation

Account Federation provides the administrator a list of linked accounts. To access Account Federation:

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Account Linking**.
3. Your list of linked accounts is displayed. **Federated Name** helps differentiate one account from another.



Single Sign-on*

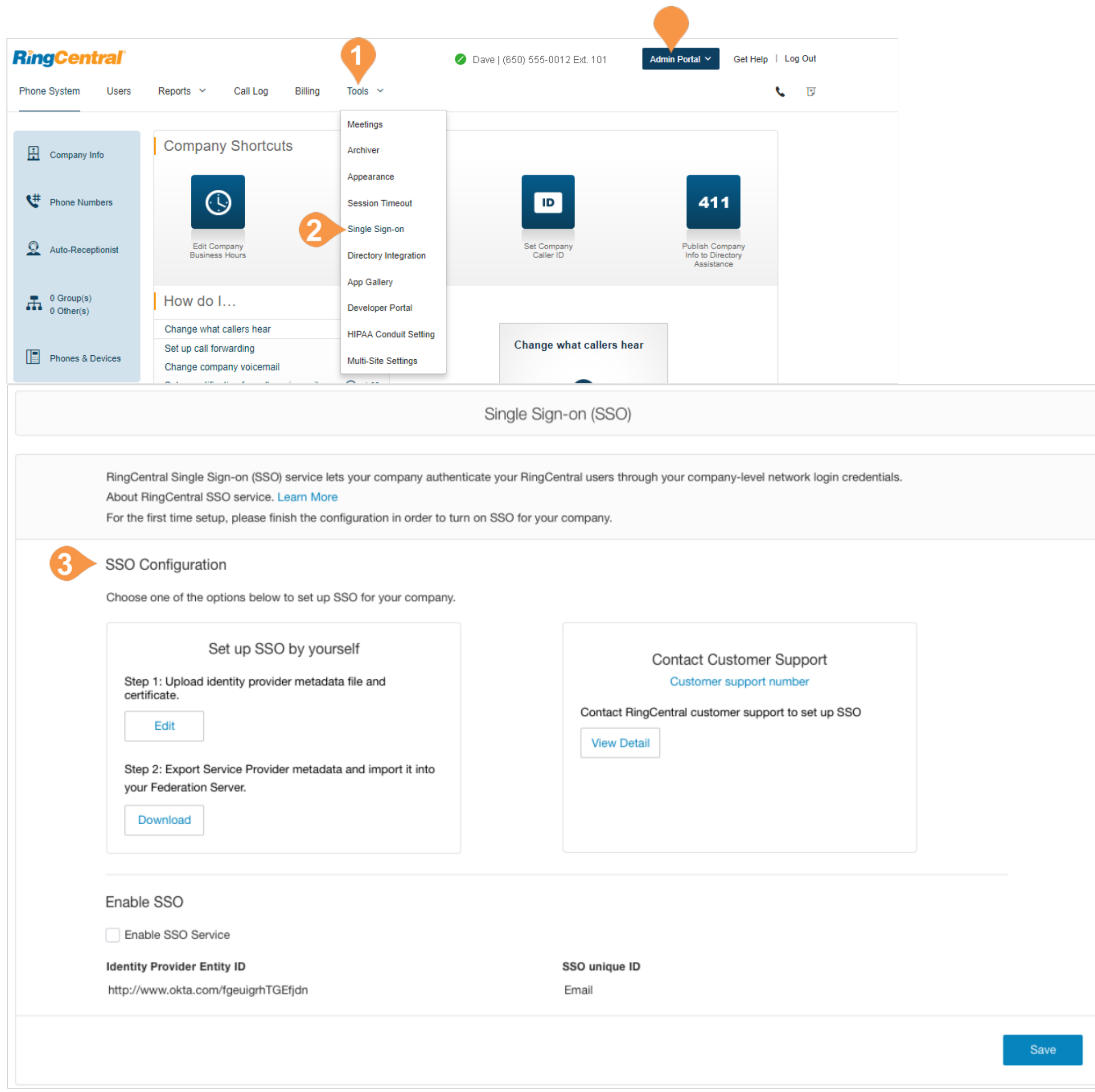
Single Sign-on allows employees in a company to access multiple applications with one set of credentials. You can work with RingCentral Customer Support to set up Single Sign-on for your RingCentral services, or you can set it up by yourself.

On Windows based systems, Single-Sign-on supports the optional use of your company's Kerberos network authentication service to authenticate clients.

RingCentral also integrates with Google SSO, which allow G Suite customers to use the Google SSO service (offered as part of G Suite IDaaS) to sign into RingCentral. Google lists RingCentral as an approved SSO app in their SAML App Catalog. You configure RingCentral for SSO in the G Suite Admin Console and configure the RingCentral SSO as described here. For more information on configuring Google SSO with RingCentral, see Google Auto User Provisioning.

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Single Sign-on**.
3. Choose an option to set up SSO:
   - **Set up SSO by yourself**: use the self-service UI to configure the Service Provider (SP) settings. Perform the steps in Set up Single Sign-On by Yourself.
   - **Contact Customer Support**: use RingCentral Customer Support to configure the Service Provider (SP) settings. Click the **View Detail** link, and perform the steps in Contact Support to Enable SSO.

*Available for Premium and Ultimate users only.

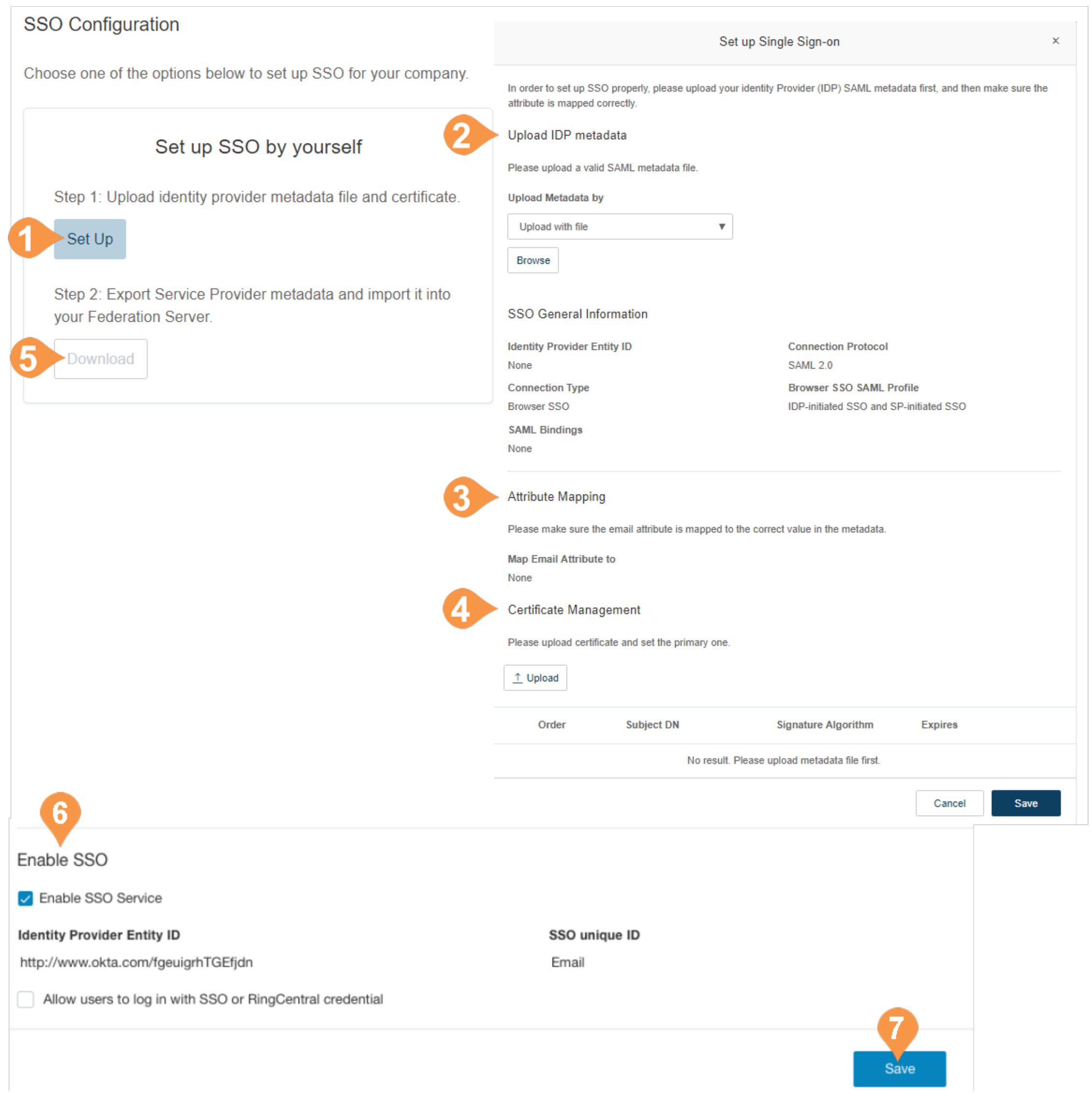


Set up Single Sign-On by Yourself

To set up SSO by yourself, upload your Identity Provider (IdP) SAML metadata, make sure the attribute is mapped correctly, and download the metadata for importing it into your Federation Server:

1. In the Set up SSO by yourself box, click **Set Up** to set up SSO for the first time, or **Edit** to change your configuration.
2. Upload the Identity Provider metadata from either a local file or an URL from your IdP. If the IDP entity ID has already been used by another account, you need to contact support for manually configuration.

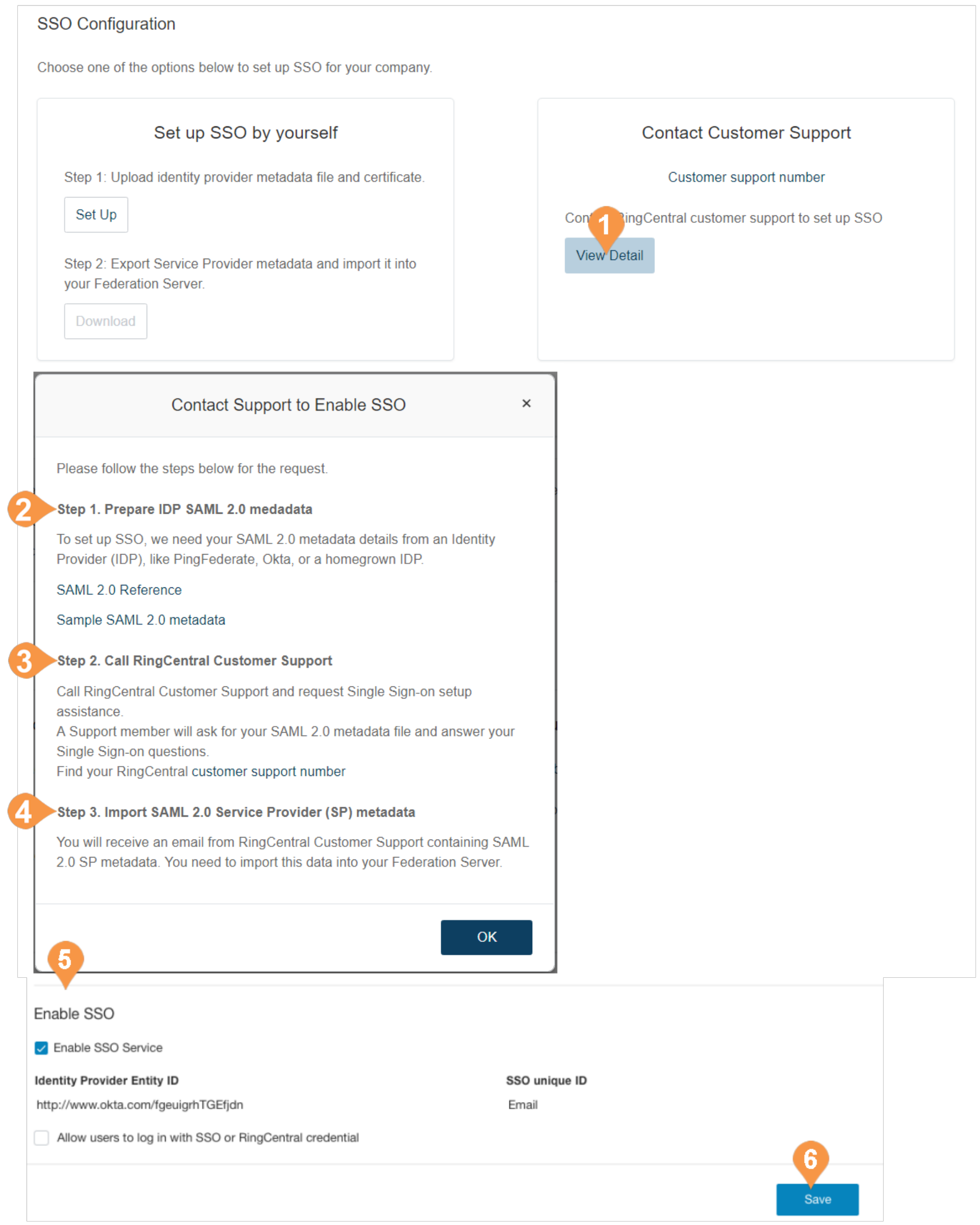
   Once uploaded, the information will be parsed from the metadata and displayed automatically.
3. Select the attribute in your metadata which should be mapped to email on RingCentral. The **Map Email Attribute To** menu lists all the attributes parsed from the IdP metadata.
4. If the metadata already contains the certificate information, it will show in the list. Otherwise, add the certificates manually. You can add multiple certificates, but only the ones ordered as Primary and Secondary certificates will be used. Click **Save**.
5. Click **Download** to export the Service Provider metadata and import it into your Federation Server to complete the configuration.
6. Check **Enable SSO Service**.
7. Click **Save**.



Contact Support to Enable SSO

This section describes how you prepare the request, and contact RingCentral Customer Support to configure the Service Provider (SP) settings required to enable SSO on your IDP server:

1. In the Contact Customer Support box click the **View Detail** link, and perform the steps as described.
2. Get your SAML 2.0 metadata details from your Identity Provider (IDP), such as PingFederate, Okta, or a homegrown IdP.
3. Click **RingCentral Customer Support Number** and call support to request Single Sign-on setup assistance. A support member will ask for your SAML 2.0 metadata file and answer your Single Sign-On questions.
4. You will receive an email from RingCentral containing your SAML 2.0 SP metadata. Import the metadata into your IdP server to complete the configuration on your IdP.
5. Check **Enable SSO Service.**
6. Click **Save.**



Directory Integration

Directory Integration lets you automatically provision users from your corporate directory into RingCentral.

Active Directory

RingCentral integrates with Microsoft Active Directory to let you automatically provision users from Active Directory to RingCentral.

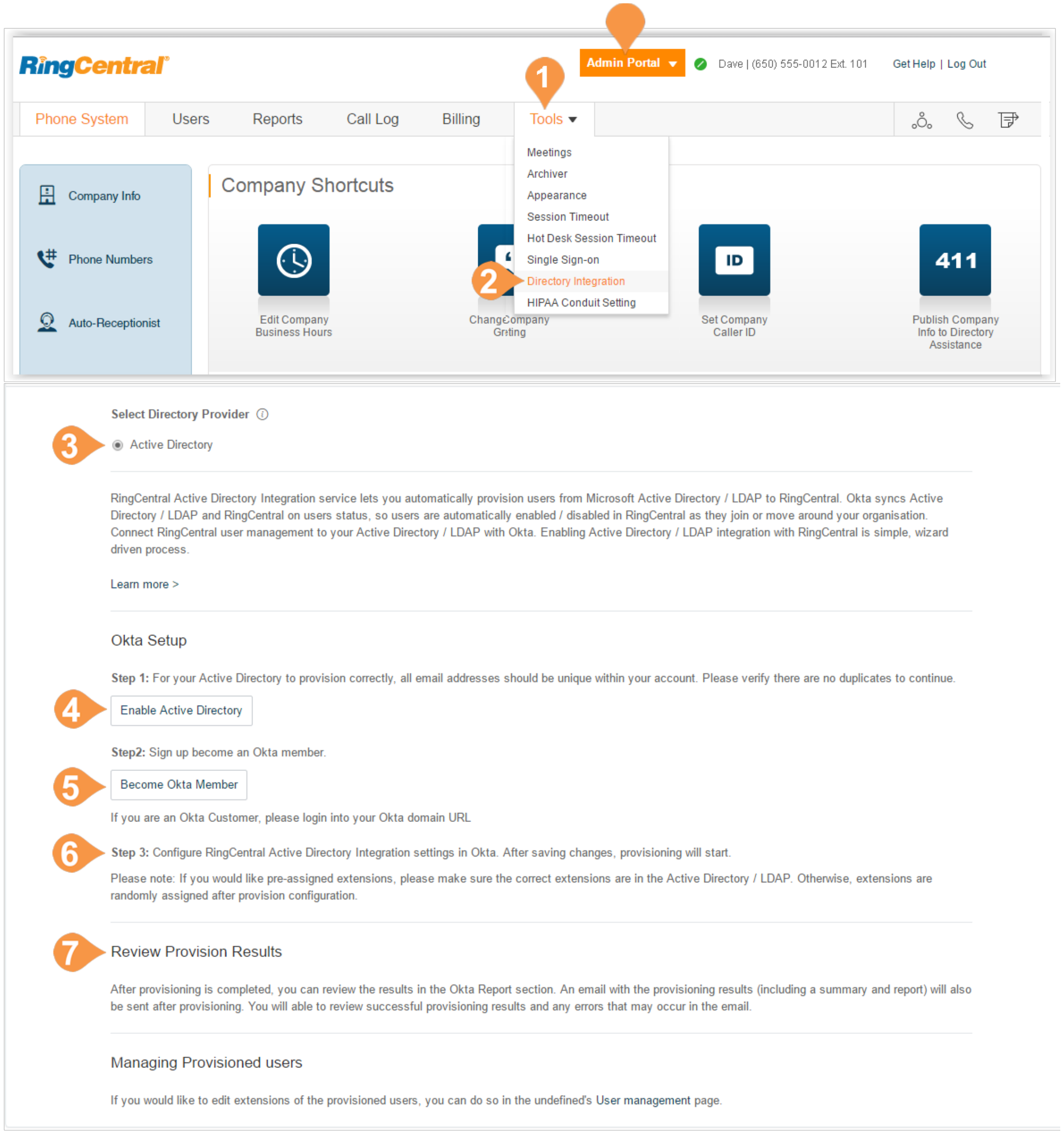
The service leverages Okta so you can perform an initial import from Active Directory to RingCentral, and to synchronize Active Directory and RingCentral on user status. Users are automatically enabled or disabled in RingCentral as they join or move around your organization.

For more details on integrating RingCentral with Active Directory, click here for the Active Directory Implementation Guide.

To set up the RingCentral integration service:

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Directory Integration**.
3. Select **Active Directory**.
4. Click **Enable Active Directory.**
5. If you are not already an Okta member, sign up for Okta by selecting Become an Okta member.
6. Configure in Okta the settings for integration with Active Directory, and save the settings in Okta. The provisioning process starts.
7. Review the provisioning results. You will receive an email containing the provisioning results, including a summary and report.

If required, edit the extensions of provisioned users in User Management in the Admin Portal.

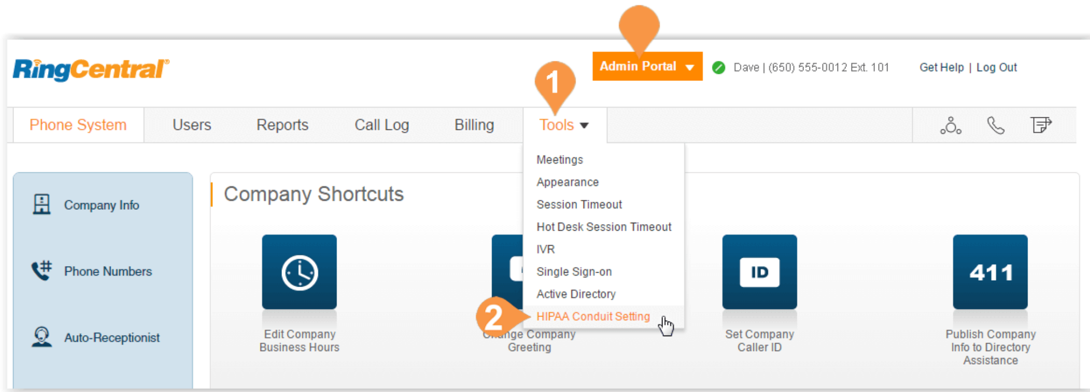


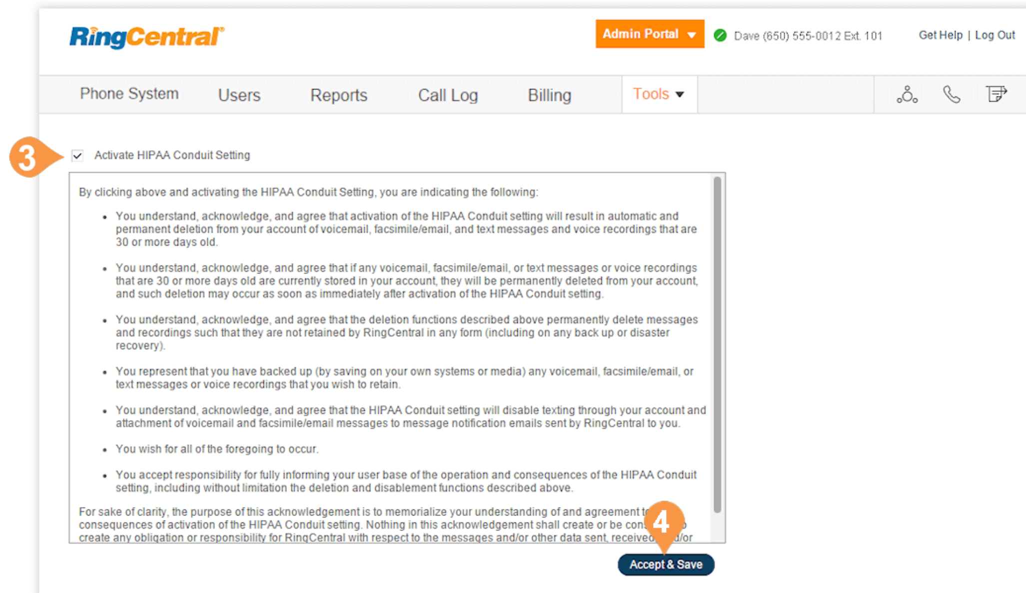
HIPAA Conduit Setting*

RingCentral's HIPAA-compliant solution ensures that customer calls and messages are secure with encryption in transit and at rest, along with other features, protecting patient data and guarding against unauthorized access to protected health information. To activate the HIPAA conduit setting:

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **HIPAA Conduit Setting**.
3. Check the box next to **Activate HIPAA Conduit Setting**.
4. Click **Accept & Save**. Once activated the following occurs:
   - Automatic forwarding of messages to email as an attachment is disabled
   - Business SMS is disabled from RingCentral Phone
   - Automatically delete faxes, voicemails, SMS messages and voice recordings after 30 days.

*Available for US users only.





Multi-Site Settings

Multi-Site Support provides a management solution for customers with multiple branch locations. Multi-Site Support is available for RingCentral Office Premium and Ultimate users with Multi-Level IVR enabled.

Accounts configured with multi-site support can enable the Site Code feature to define a dial plan for intra-site and inter-site calling. This feature allows the administrator to allocate account user or group extensions for defined sites.

To enable Multi-Level IVR mode, configure the dial-by-name directory, create at least one IVR menu and enable the feature in Auto-Receptionist.

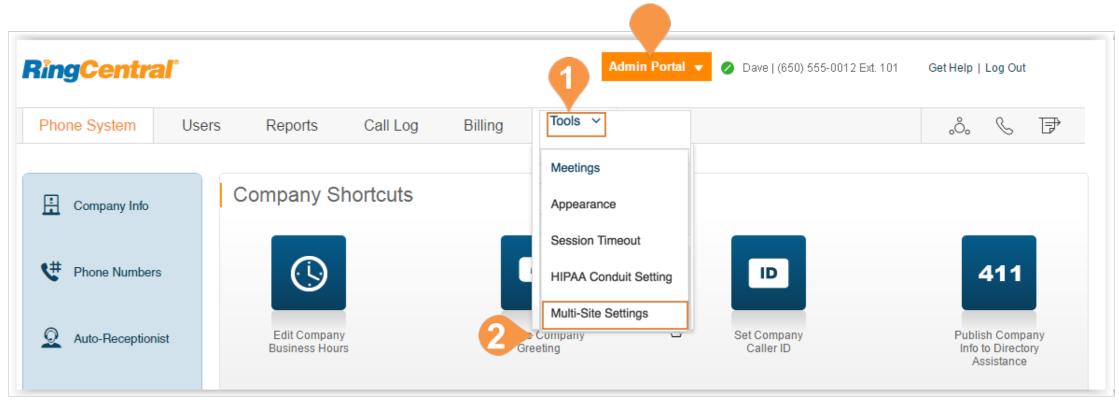
To enable your account to support multiple sites:

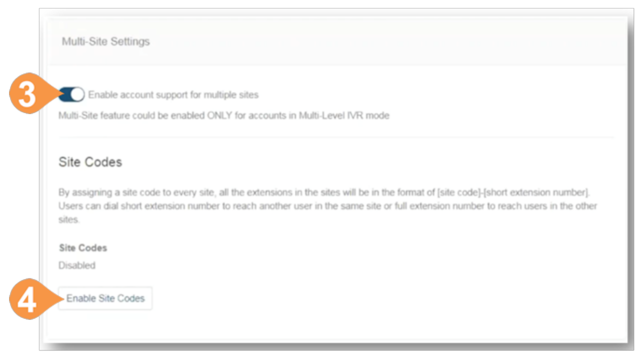
1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Multi-Site Settings**.
3. Check the box beside **Enable account support for multiple sites**.
4. Configure site codes, if required for your dialing plan. See Manage a Dial-Plan Across Sites.

Your online account can now create and configure multiple sites. Site filters are available on pages with site assets to allow you to view the list of assets by sites.

For more information on Multi-Site support, see:

- Create a New Site
- Manage a Dial-Plan Across Sites
- Move Assets Across Sites
- Manage Sites with Multi-Site Support
- Manage Auto-Receptionist with Multi-Site Support
- Manage Permissions in Multi-Site Accounts



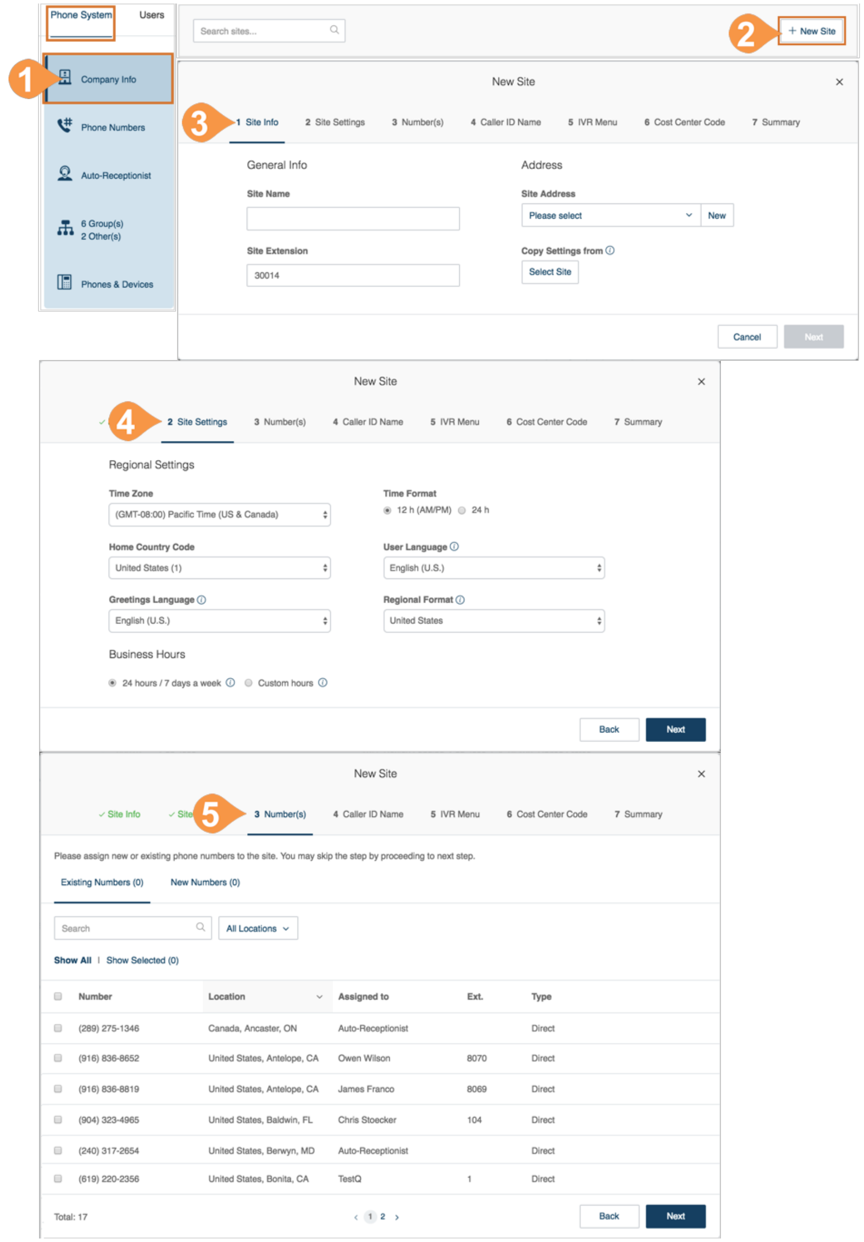


Create a New Site

RingCentral Multi-Site support allows you to provision independent account configurations for your individual sites, to enable you to uniquely register and manage each site from your account. Once Multi-Site Support is enabled, you can create additional sites as needed.

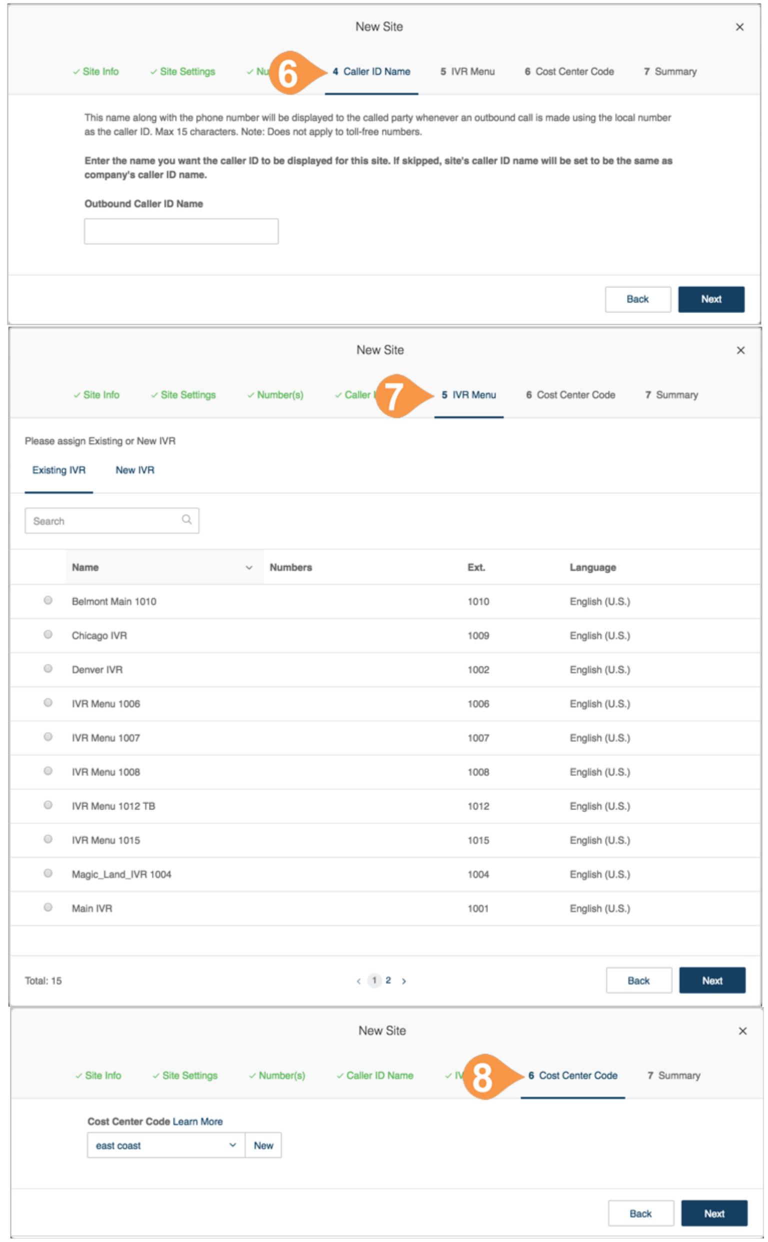
To create a site:

1. From the **Admin Portal**, click the **Phone System** tab.
2. On the **Company Info** page, click **New Site**.
3. On the Site Info page, enter the **Site Name**, **Site Address**, and **Site Extension**. Or, you may click **Select Site** under **Copy Settings** from" to copy settings from another site. Click **Next** to proceed.
4. On the Site Settings page, configure the Regional Settings and Business hours. Click **Next** to proceed.
5. Assign Numbers to the Site. You may assign existing numbers or add (and purchase) new direct numbers. Click **Next** to proceed.



6. On the Caller ID Name page, enter the **Outbound Caller ID Name**.
7. On the IVR Menu page, select an **Existing IVR** or a **New IVR**.
8. On the Cost Center Code page, select the site's cost center code. For more information on Cost Center Codes, see Cost Center Management*.

On the Summary page, you will be notified that the site is created successfully. Click **Done**. You can view or edit site information within **Phone System** > **Company**.

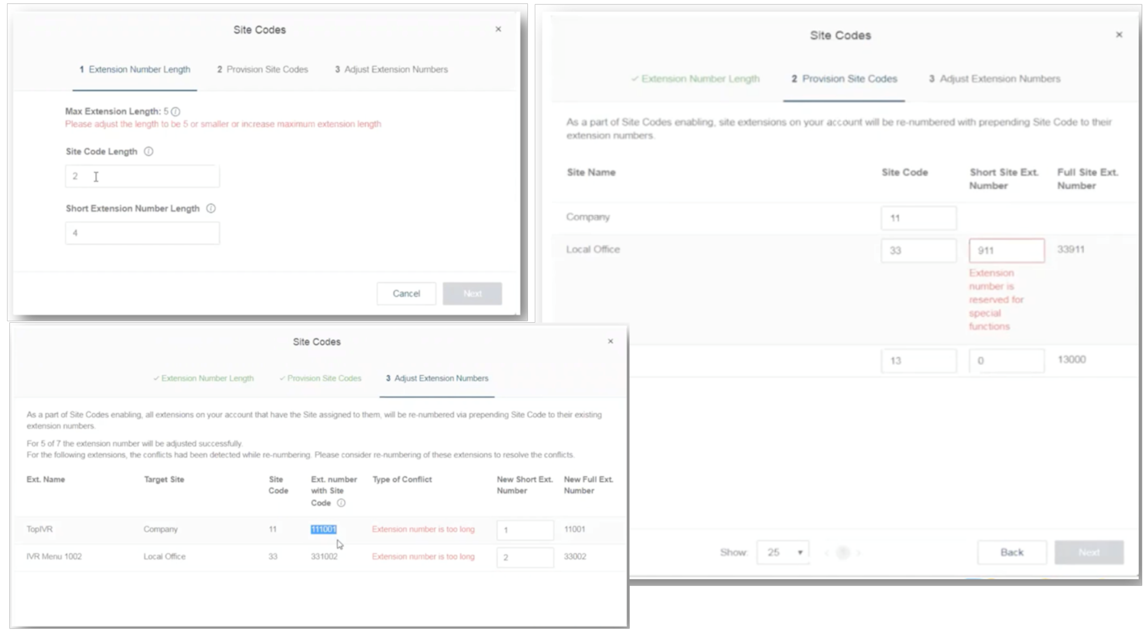


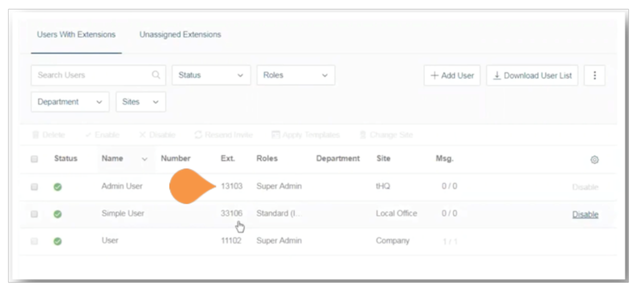
Manage a Dial-Plan Across Sites

Accounts configured with multi-site support can enable the Site Code feature to define a dial plan for intra-site and inter-site calling. This allows users within a site to call each other using a short extension number, and users between sites to use a full extension number, consisting of a site code plus the short extension.

To set up your multi-site dial-plan:

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Multi-Site Settings**.
3. Verify that multi-site support is enabled.
4. In the **Extension Number Length** window, select an appropriate digit length for the short extension and the site code. The values must fall within the limits of the full extension number length, per the maximum extension length of five digits.* Click **Next**.
5. In the **Provision Site Codes** window, the system will suggest site codes for all sites, per selected lengths for site code and short extension. The User and Group extension per site will be allocated per site code selected. Click **Next**.
6. In the **Adjust Extension Numbers** window, Existing extensions that have more digits than enabled with site code need to be adjusted or use system suggestions. Click **Done**.





Extensions in the **Users with Extensions** view display a site code plus a short extension. For example: Site Code: 11, Short Ext. #: 001, and Full-Ext #: 11001.

*Note: a maximum extension length of six digits is available on-demand for certain international cases.

RingCentral

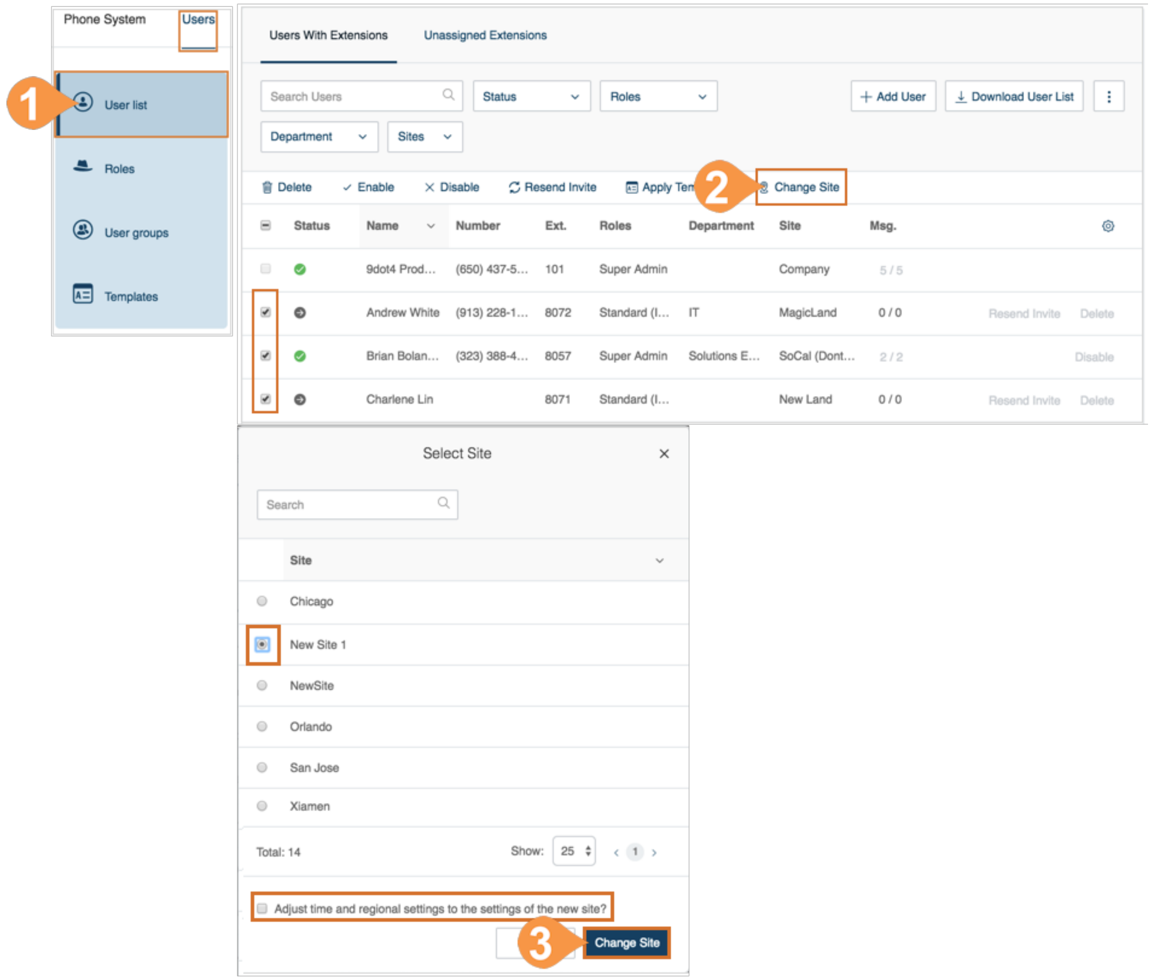
Move Assets Across Sites

The Change Site function of Multi-Site Support allows you to move selected Users, IVR Menus, and Call Queues to another site. This feature allows for individual or bulk movement of Users, IVR Menus, and Call Queues between sites.

Move Users across Sites

To move users between sites:

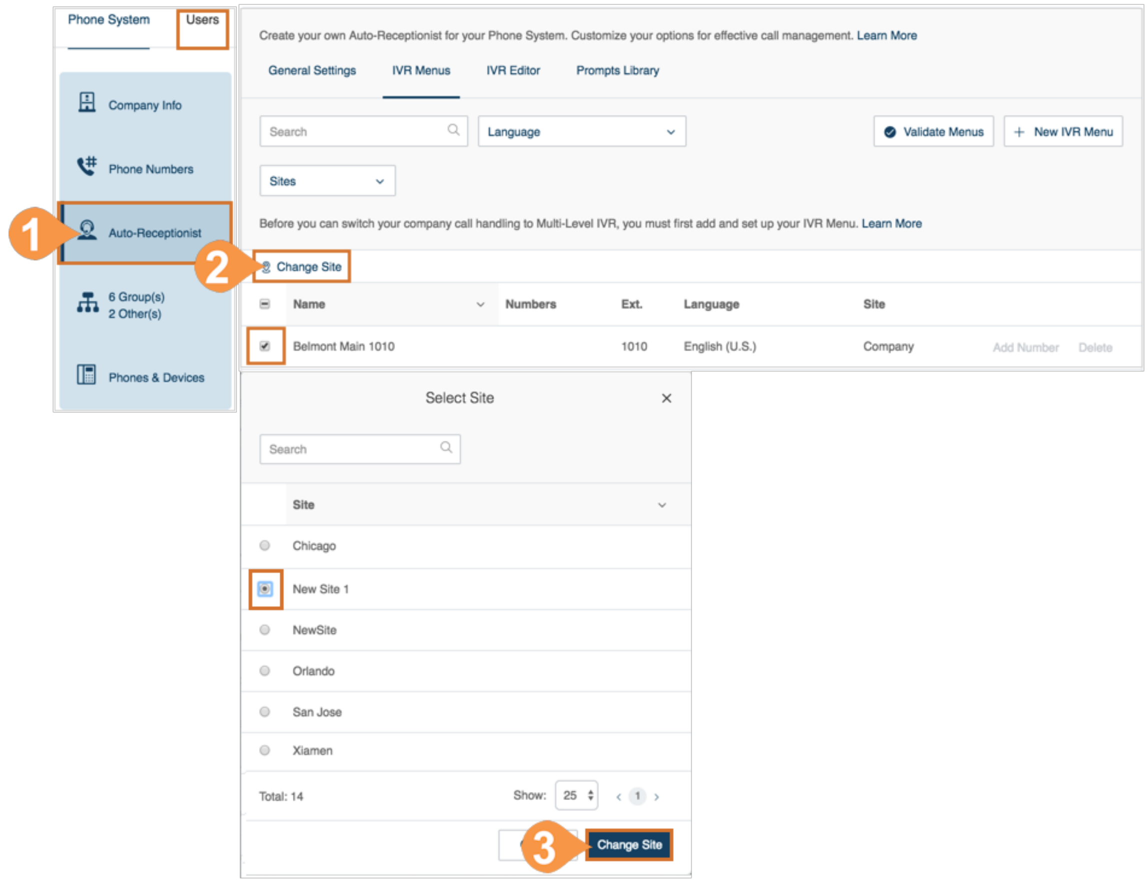
1. From the **Admin Portal**, click the **Users** tab.
2. On the User list tab, check the box of the users you want to assign to a different site, and click **Change Site**.
3. Select the site then click **Change Site**. Note: You may check the option to **Adjust time and regional settings to the settings of the new site?** to apply it to the moved users.



Move IVR Menus across Sites

To move IVR menus between sites:

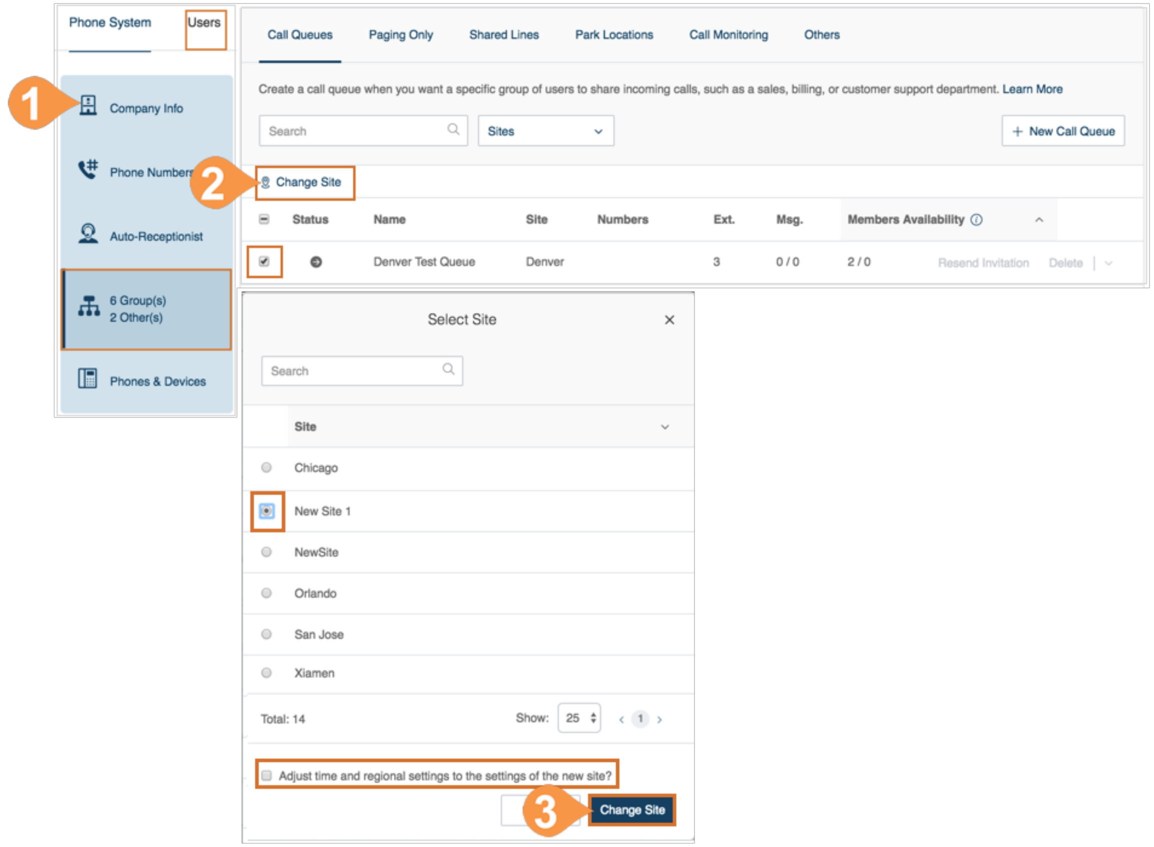
1. From the **Admin Portal**, click the **Phone System** tab, and click **Auto Receptionist**.
2. Click the **IVR Menus** tab. Select from the list of IVR Menus and click **Change Site.**
3. Select the site then click **Change Site**.



Move Call Queues across Sites

To move call queues between sites:

1. From the **Admin Portal**, click the **Phone System** tab, and click **Groups**.
2. On the **Call Queues** tab select the Call Queues that you want to move, and click **Change Site**.
3. Select the site then click **Change Site**. Note: You may check the option to **Adjust time and regional settings to the settings of the new site?** to apply it to the moved Call Queue.



Audit Trail

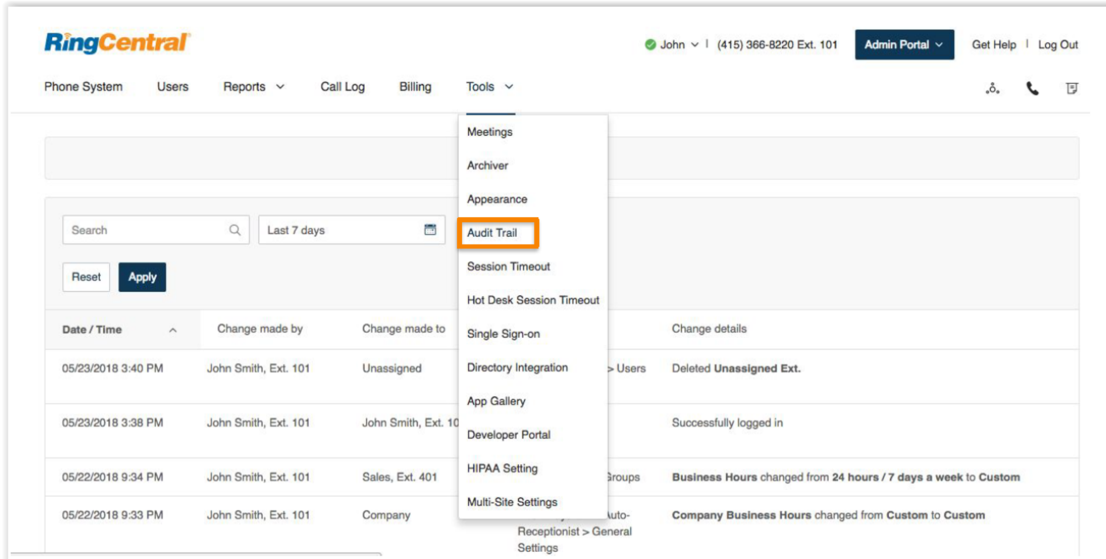
RingCentral

Audit Trail

Find and capture changes made by users that affect system events, configuration, and user accounts. Admins can see the changes made to the software without the need to contact RingCentral support.

A search tool is added so you can find information without digging through service logs or reports. You can check the latest system changes, add corrective actions, see changes made by other administrators troubleshoot an issue, and detect failed logins or locked accounts. Only the Super Admin, the Billing Admin or those roles assigned a custom role that enables Audit Trail, have access to the Audit Trail log function.

This feature provides the admin with an efficient way to control systems. It is enabled for all customers automatically. To disable, you must contact support.



Access Audit Trail

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Tools > Audit Trail**.

Audit Trail captures changes to the following events:

- **System events**
  Successful/failed login and locked accounts (includes all clients and integrations)
- **Phone System**
  Company Info: Company Address, Directory Assistance, Caller ID
  Phone numbers: company and assigned
  Auto-Receptionist: General settings and IVR menus.
  Phones & Devices: User Phones, Common area phones Paging devices, shared lines.
- **Users:**
  User lists and roles

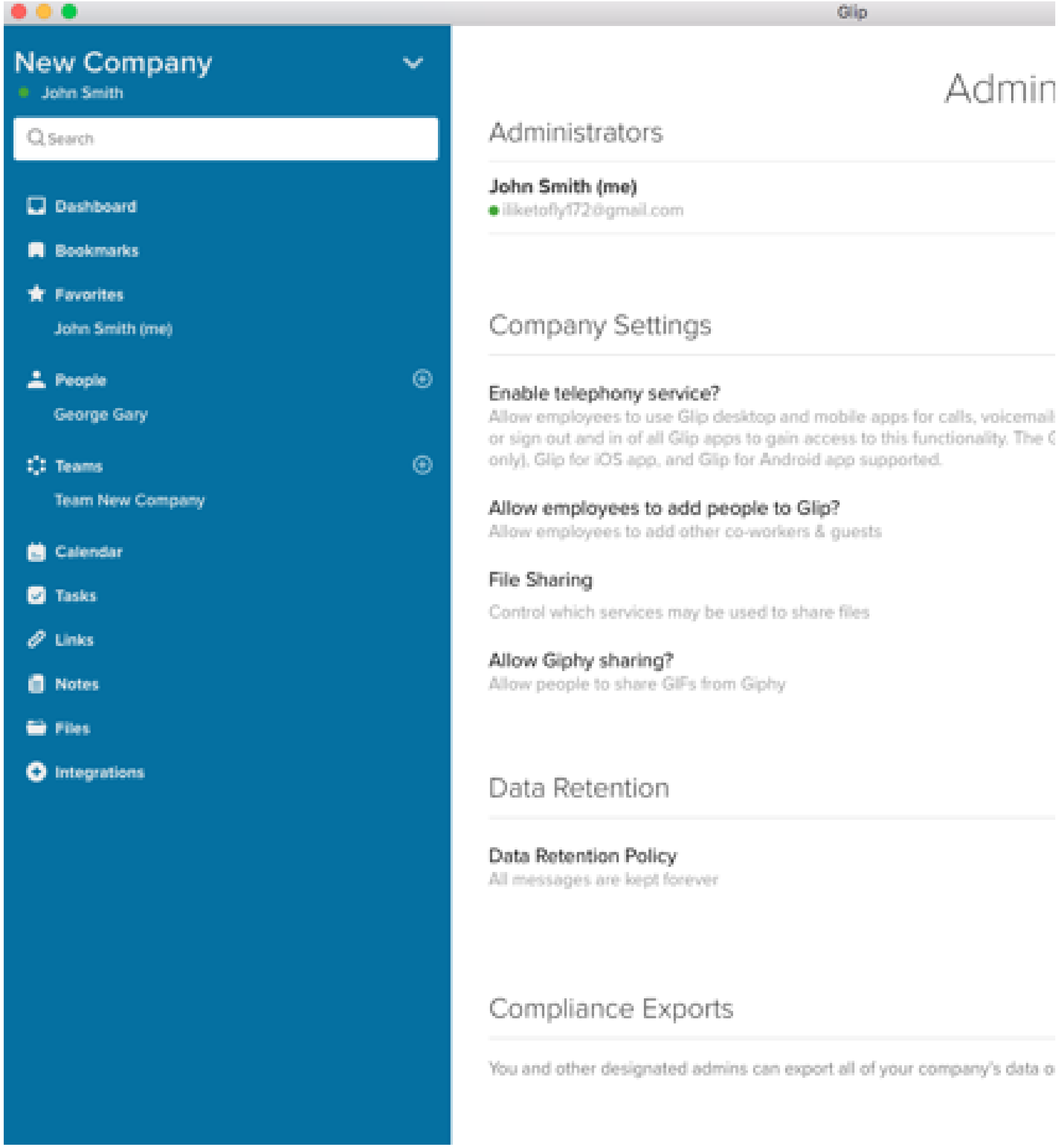
- **Unified Application Admin Settings**

  Administrators: administrators added or removed (First Last, Ext.)

  Company settings: Enable telephone service; Allow employees to add people (on/off); File sharing (service, on/off) for example *Google Drive on/off*, *Evernote on/off*, etc.; Allow Giphy sharing (max rating) for example, *Max rating of PG-13*

  Data Retention: Policy set to N days

  Compliance exports: Exports (on/off); Request/download export enabled/disabled for *UserName*; Download requested by Name/email



Audit Trail Report Details

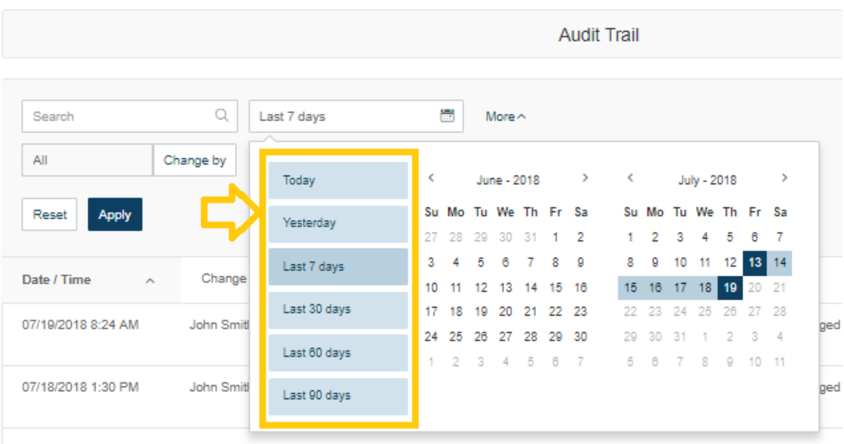
When a particular event is captured, these details are provided in the report:

- **Date/Time -** changes logged using Coordinated Universal Time (UTC) and displayed based on logged-in user's regional timezone setting.
- **Changes made by -** person who made the change.
- **Role***- permission level of person who made the change.
- **Change made to -** indicates which item was changed.
- **Item affected -** indicates the configuration that was changed.
- **Change details -** description of the change.
- **Endpoint***- application name.
- **IP Address***- application IP address.

* Indicates these report fields are only available in a downloaded comma-delimited (CSV) log file.

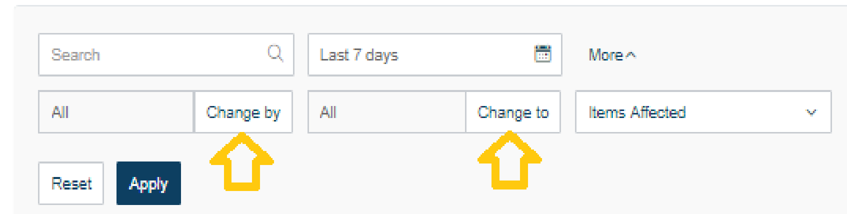
Search Capability

You can search records that provide report details by time periods: **Today**, **Yesterday**, **Last 7 days**, **Last 30 days**, **Last 60 days**, **Last 90 days**.



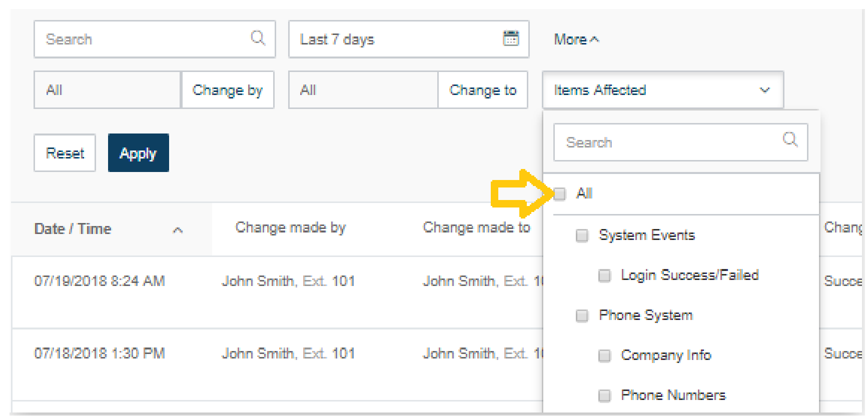
Search by Change

You can also search by specific change, such as a change made by a user (**Change by**) or a change made to (**Change to**) a particular extension. This can be done by selecting one of these options in the menu. When you select **Change by** or **Change to**, a list of extensions is displayed for you to choose which one of these is affected.



Search by Items Affected

The **Items Affected** menu lets you select the specific event items that can be searched. You can either select from this list or choose **All**.

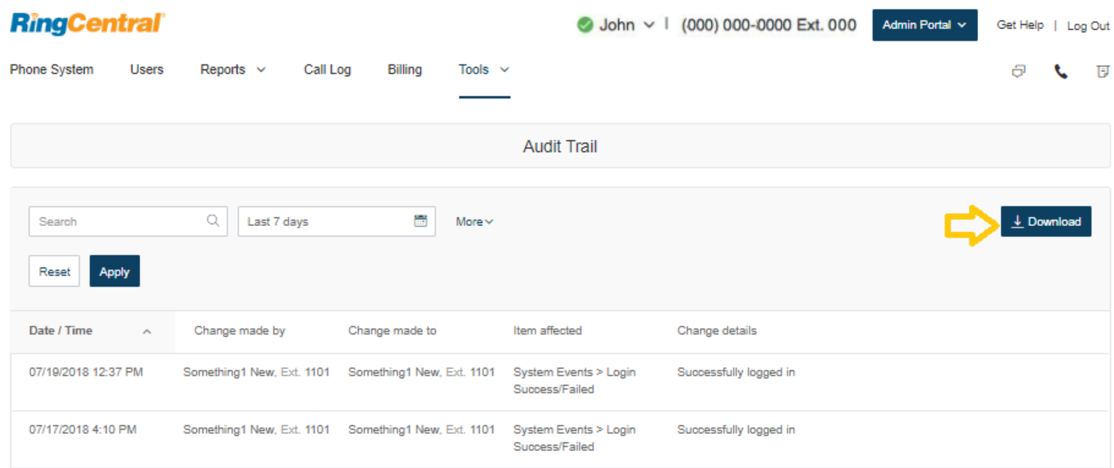


Downloading an Audit Trail Report

Once you have searched and found information in Audit Trail, you can download an Audit Trail report in .csv format.

From the Admin Portal,

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Tools > Audit Trail**.
3. Do an Audit Trail search.
4. When you would like to generate a CSV file containing the Audit Trail result, click **the Download** button.
   A Confirmation window appears.
5. To confirm, click **Download**.



RingCentral Meetings

Introduction to Managing Meetings

Meetings contains tools for RingCentral Meetings, RingCentral Rooms*, and RingCentral Webinar*, including software download, configuration settings, and viewing reports. Use Meetings to:

- Download/update software for RingCentral Rooms
- Add RingCentral Rooms for meeting spaces
- Manage settings for Meetings, Rooms, and Webinar
- View/download reports for Meetings and Webinar

System Requirements for RingCentral Rooms

You must connect and verify operation of all hardware before installing the RingCentral Rooms software on the Mac® and iPad® controller.

- Windows, or Mac with Mac OS® 10.9 or later
  — For single monitor: Intel® Core™ i5 2 GHz processor or higher
  — For dual or triple monitors: Intel Core i7 3 GHz processor or higher
- Apple iPad or iPad mini™ with iOS® 7 or later (as a control)
- Camera and audio system (microphone and speaker)
- Monitor(s)
- Requires RingCentral Office subscription

Sharing content by AirPlay requires:

- Mac or iOS AirPlay-compatible device
- Ethernet or Wi-Fi network (802.11n technology)

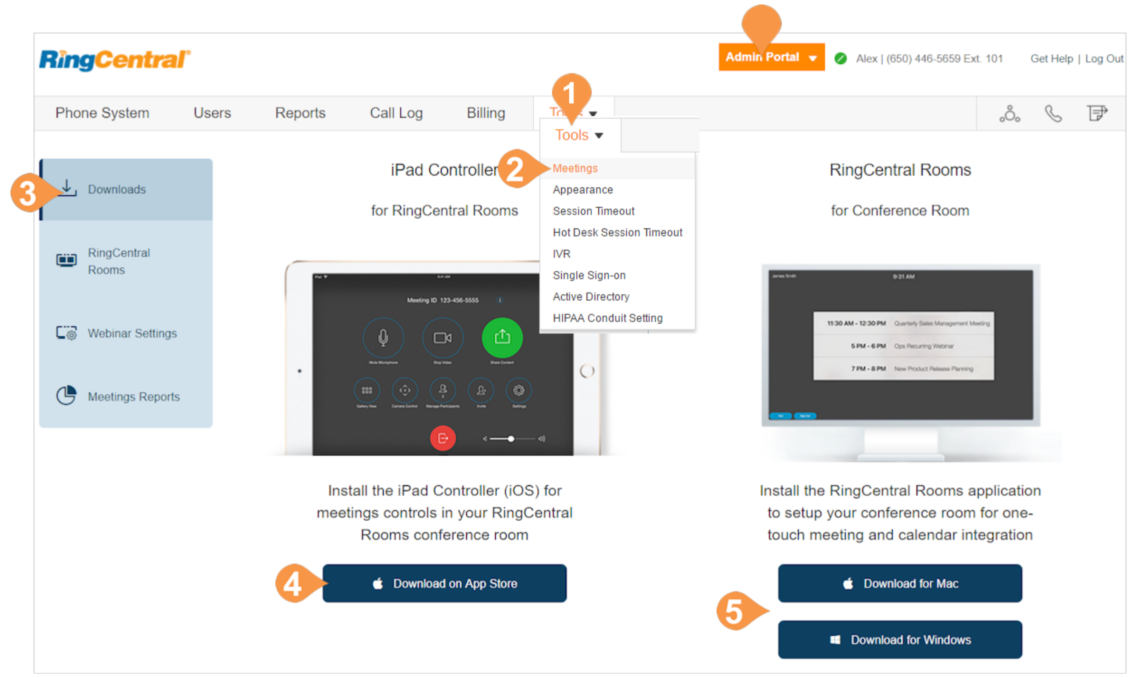
*RingCentral Rooms and Webinar require purchased licenses.

Download RingCentral Rooms Software

RingCentral Rooms requires installing software on both the Mac or Windows machine, and the iPad controller. The iPad controller software provides the meeting controls for your RingCentral Rooms conference room. The RingCentral Rooms application (available for Mac or Windows) lets you set up your conference room for one-touch meeting and calendar integration.

Install the RingCentral Rooms software:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Meetings**.
3. Click **Downloads**.
4. To install software for the iPad controller:
   - Click **Download on App Store**.
   - Install the software on to the iOS 7.0 or later iPad through the iTunes application.
5. To install software for RingCentral Rooms:
   - Click **Download for Mac** or **Download for Windows**.
   - Install the software onto your machine.



Add New RingCentral Rooms

Once an admin has purchased licenses, add rooms:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Meetings**.
3. Click **RingCentral Rooms**.
4. Click **Add RingCentral Rooms With**.
5. Select the calendar integration type:
    - Google Service Account
    - Exchange/Office 365
    - No Calendar Integration
6. Enter information to set up calendar integration:

For Google

- Room Resource Delegate Account: the service account that is delegated access to RingCentral Rooms data.
- Google Service Account: The service account's email address.
- Service Account Private Key (p12): The service account's P12 private key. Click **Upload** and select the key.

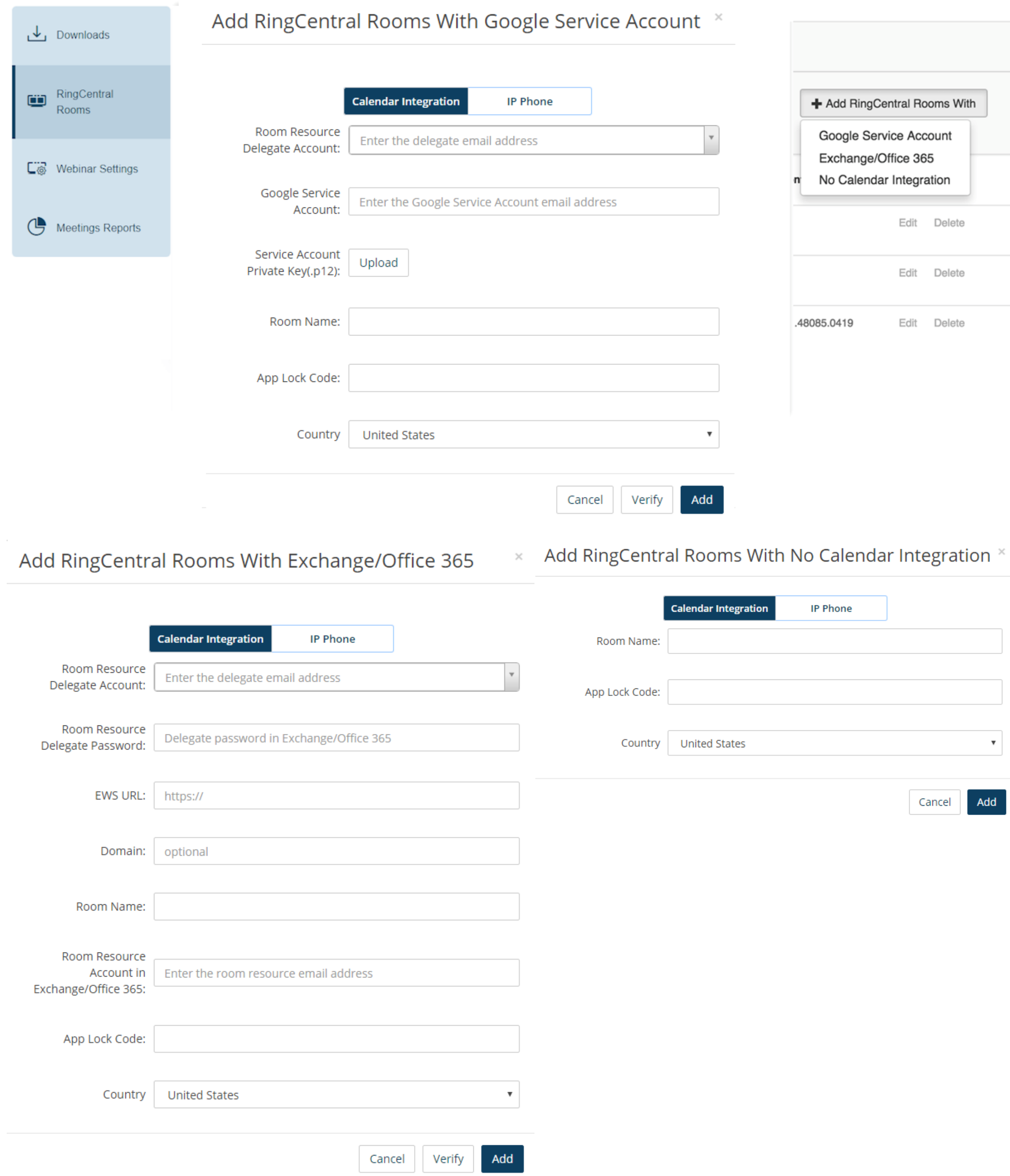
For Exchange/Office 365

- Room Resource Delegate Account: A dedicated work email address for this room. This email must be a Pro user under your account.
- Room Resource Delegate Password: The password for that email account.
- EWS URL: Exchange Web Service (EWS) URL found in EMC/ECP.
- Domain: Applies if using domain login authentication. Enter the domain name only.
- Room Resource Account in Exchange/Office 365: The email address of the room set up in Exchange/Office 365.

For all Rooms

- Room Name: Conference room name.
- App Lock Code: Numeric code to lock iPad settings.

7. Click **Verify** to test the integration.
8. Click **Add**. A message indicates success.

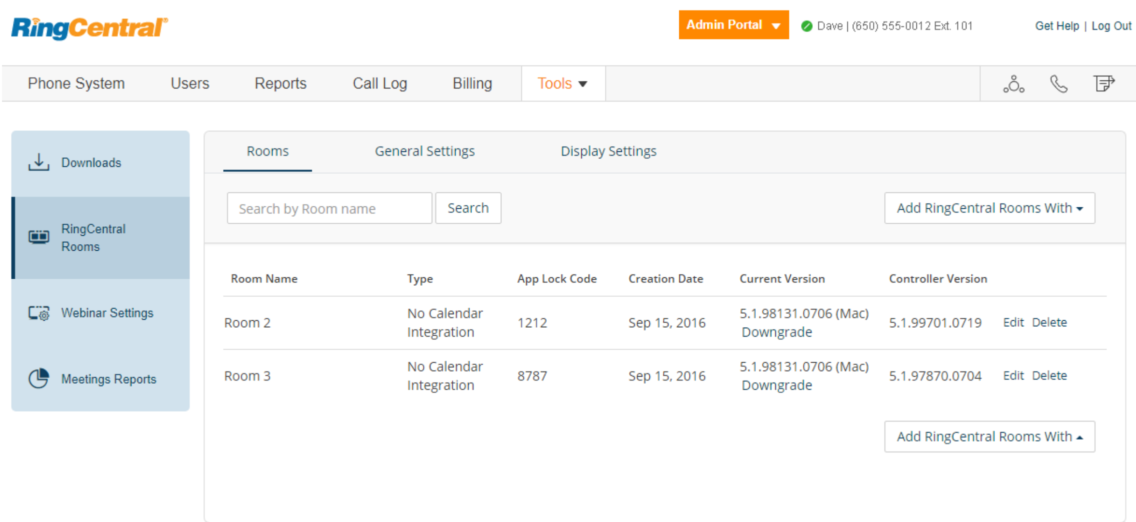


View Rooms in Your Account

You can view all the rooms that are configured with RingCentral Rooms licenses in your account.

View existing conference rooms

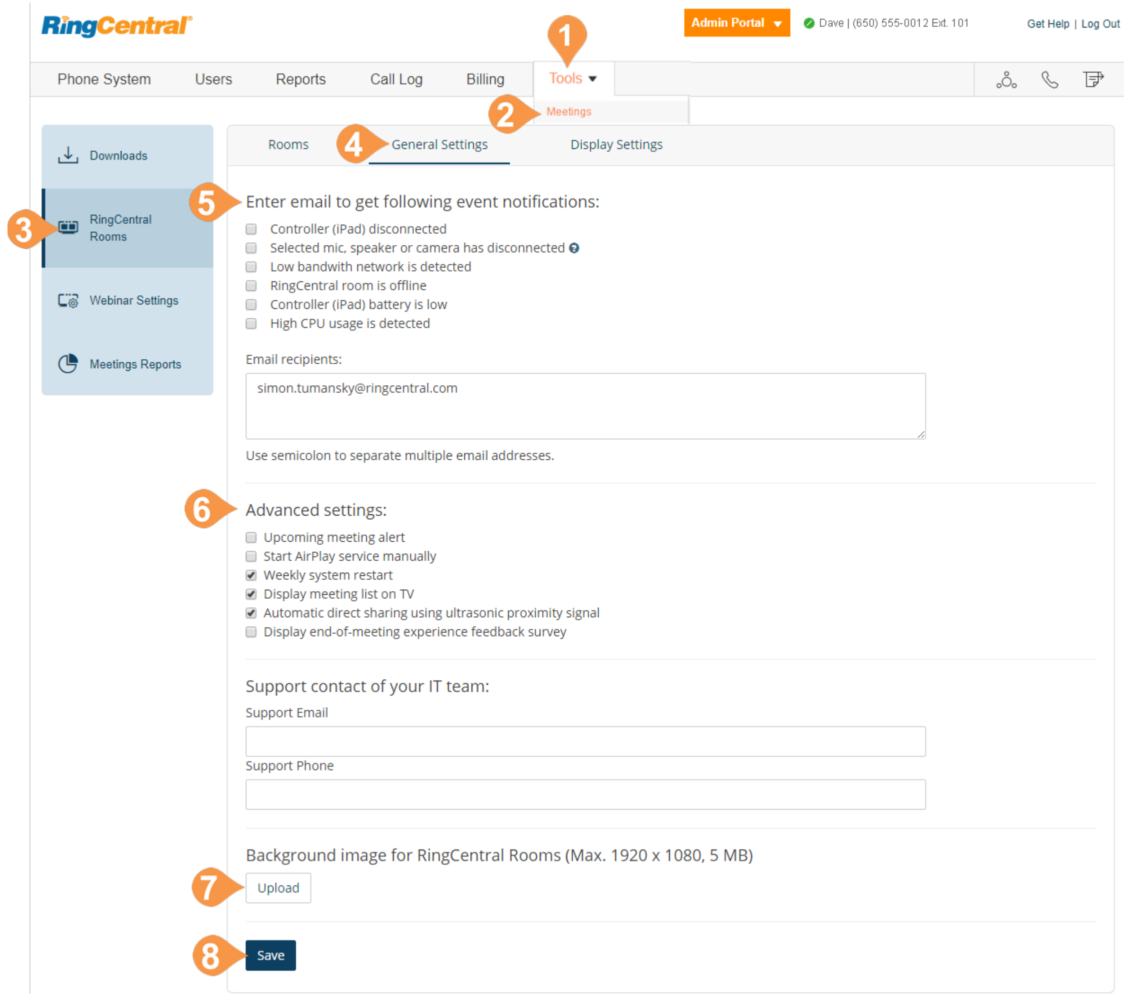
1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Meetings**.
3. Click **RingCentral Rooms**.
4. On the Rooms tab, you can view a list of rooms that are configured with RingCentral Rooms licenses. To search for a Room name, enter a name and click **Search**.
5. Information is displayed for each room:
   - Room Name: The name you assigned when creating the conference room.
   - Type: The type of calendar integration with the conference room.
   - App Lock Code: The numeric code that controls access to the iPad controller settings.
   - Creation Date: The date when you created the conference room.
   - Current Version: The version of RingCentral Rooms software installed on the Mac or Windows machine.
   - Controller Version: The version of software installed on the iPad controller. When a newer release becomes available, you can click to upgrade here (or, you can downgrade to an earlier version.)



Manage RingCentral Rooms General Settings

You can edit general settings for RingCentral Rooms:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Meetings.**
3. Click **RingCentral Rooms**.
4. Click the **General Settings** tab.
5. Edit the event notification settings as follows:
    - Notifications: Indicate events for which you want to receive notifications.
    - Email recipients: Enter the email addresses that receive notifications. Use a semicolon to separate multiple email addresses.
6. Edit the advanced settings as follows:
    - Upcoming meeting alert: enable receiving a meeting alert on the iPad controller 10 minutes before start of a scheduled meeting.
    - Start AirPlay service manually: enable users to start AirPlay service manually with the RingCentral Rooms Mac.
    - Weekly system restart: enable auto restart of your computer weekly (Saturday), between the hours of 2:00–4:00 a.m. (local time on the computer), when no meeting is in progress.
    - Display meeting list on TV: display all upcoming meetings on your TV, monitor or projector display. Requires meetings to be scheduled in Google, or Microsoft Exchange.
    - Automatic direct sharing using ultrasonic proximity signal: enables the iPad controller to generate an ultrasonic signal that can be detected by the Meetings desktop app.
    - Display end of meeting experience survey: prompt attendees with a feedback survey.
7. Click **Upload** to add a background image for RingCentral Rooms. This is an image of 1920 x 1080 maximum resolution, and 5 MB size.
8. Click **Save** to save your settings.



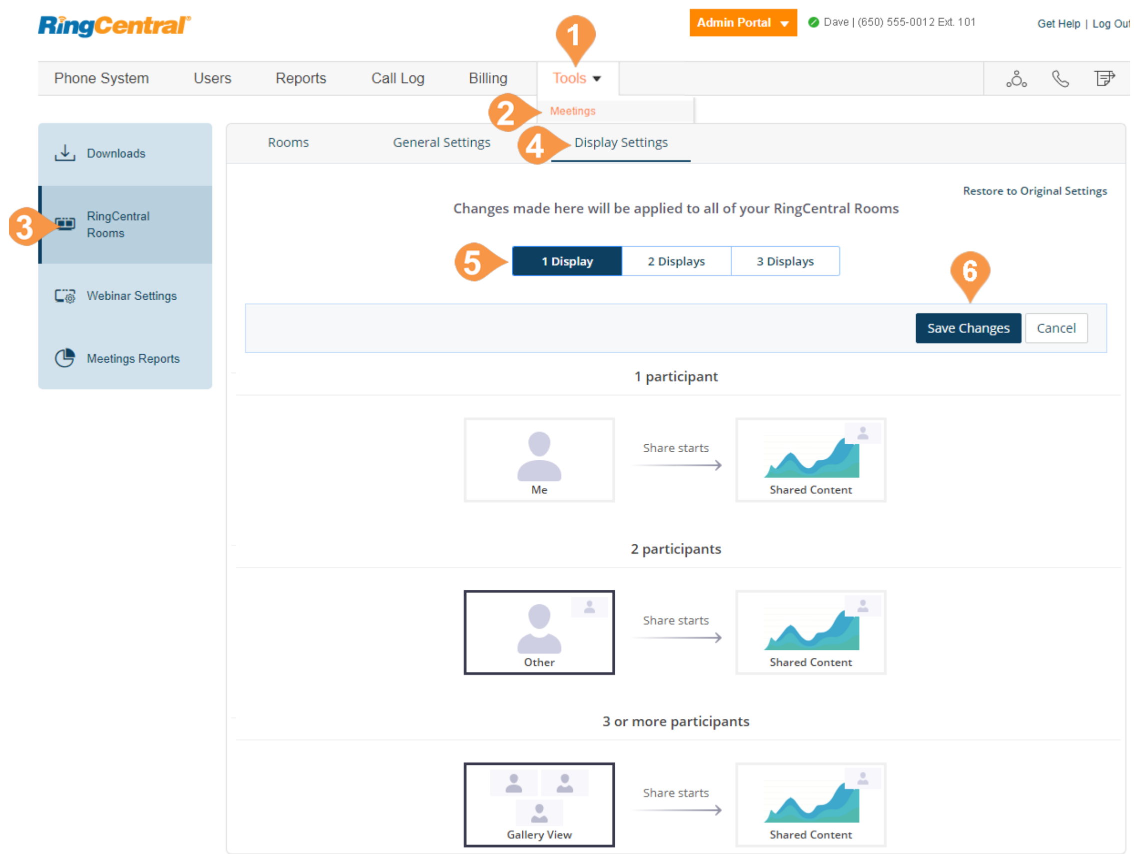
Manage RingCentral Rooms Display Settings

RingCentral Rooms supports multiple displays. The RingCentral Rooms display settings you can configure in this section apply to video and content display in all of your rooms. What users can see on each screen depends on the number of participants and whether anyone is sharing a screen.

Note: to customize individual rooms, go to the Rooms tab, click a room name, and select **Display Settings**.

To set display settings for RingCentral Rooms:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Meetings**.
3. Click **RingCentral Rooms**.
4. Click the **Display Settings** tab.
5. You can customize the default screen views on one, two, or three displays. For each display configuration, select the default screen views for each number of participants. At least one screen must be set to Shared Content.
6. Click **Save Changes** to save your settings, or click **Restore to Original Settings** if needed.



Configure Webinar Settings

RingCentral Webinar, an add-on for RingCentral Meetings, lets you host virtual events and online training with up to 3,000 attendees, joining from desktops, tablets, and smart devices.

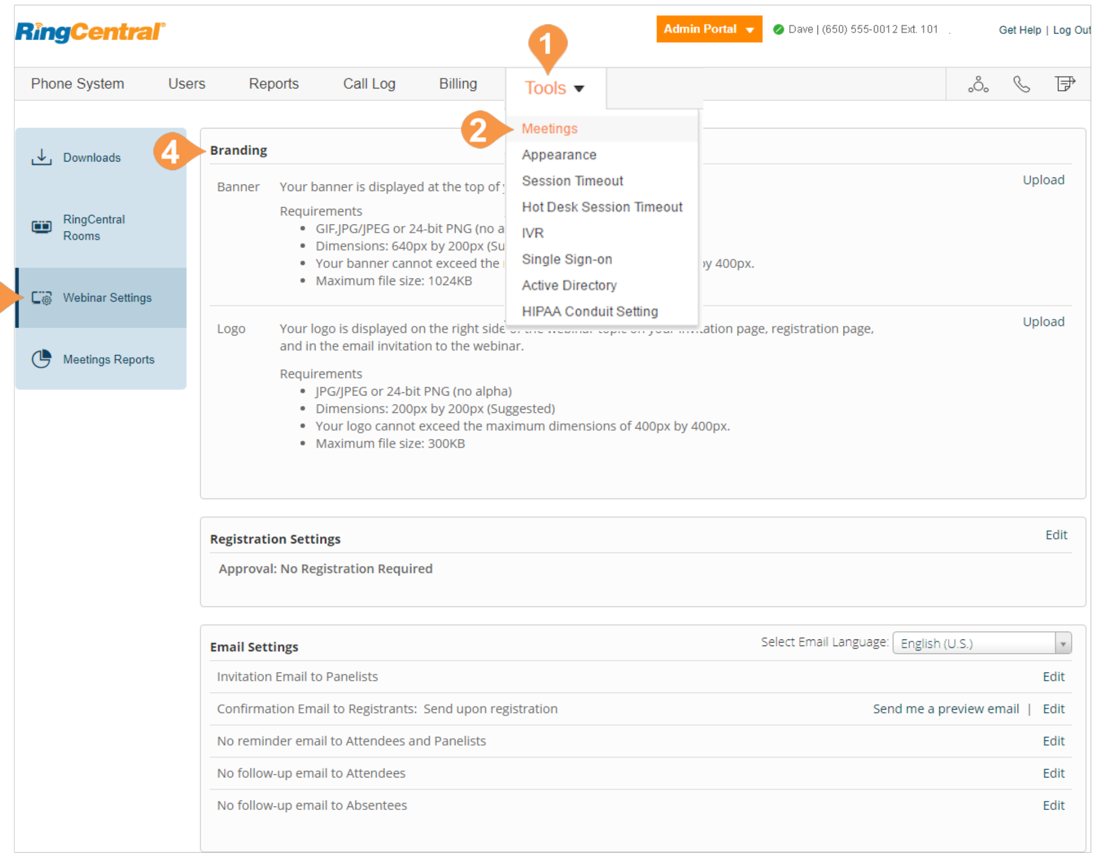
RingCentral Webinar allows you to add your branding which is composed of a banner and a logo. The banner and logo appear on your webinar registration page, invitation and all emails. The banner, logo, registration settings and email settings can be customized in the **Webinar Settings** page.

The **Webinar Settings** page can be accessed in your RingCentral online account. An administrator can make changes that will be applied to all webinars. Admin settings are treated as a default settings across the entire account. However, when users make changes to their own webinar settings in **Tools** > **Meetings** > **My Webinars**, those settings overwrite default settings.

You can edit settings for RingCentral Webinar:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Meetings**.
3. Click **Webinar Settings**.
4. Edit the settings as follows:

- **Banner**: upload or delete a banner image for all webinars. The banner is displayed at the top of your registration page and email header.
- **Logo**: upload or delete a logo for all Webinars to be displayed on the right side of the Webinar topic on your invitation page, registration page, and in the email invitation to the webinar.
- **Registration Settings**: customize settings for how registrants register for and join webinars.



- **Email Settings**: customize different email templates to be sent to panelists, attendees, and registrants.

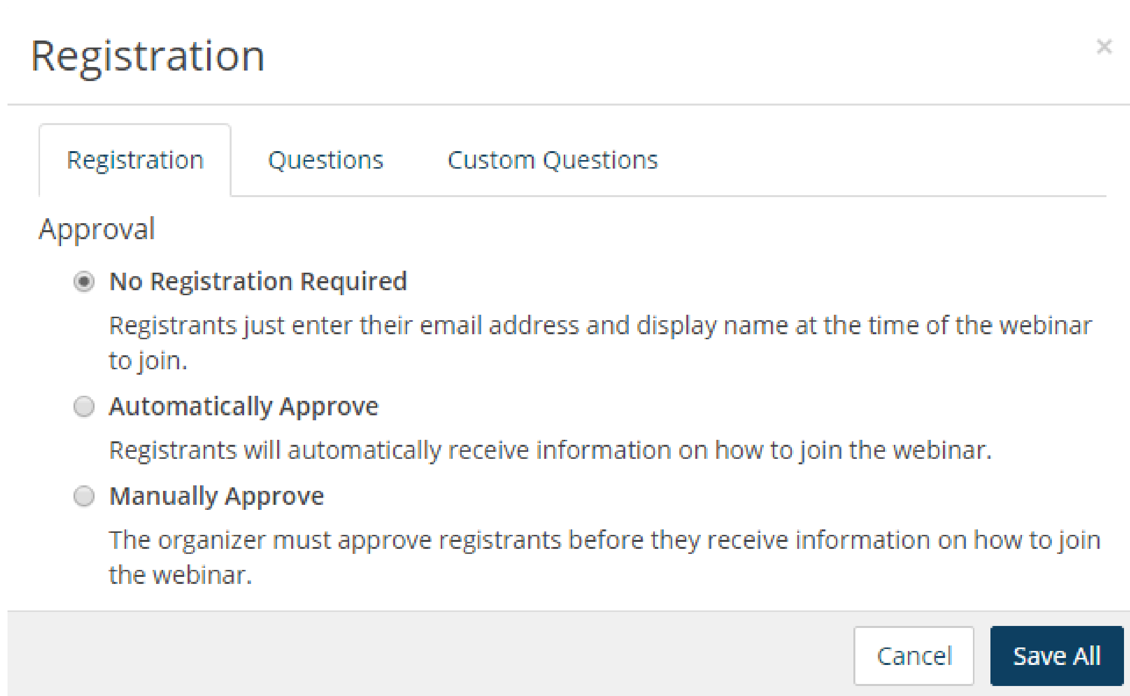
Registration Settings

Edit RingCentral Webinar registration settings to customize how registrants register for and join webinars. The current settings are displayed in **Webinar Settings**.

Approval

- **No Registration Required**: When this option is selected, recipients will be given a URL to join the webinar and will have to enter their name and email to join.
- **Automatically Approve**: When this option is selected, the webinar host will not need to approve every registrant. Registrants will automatically receive a confirmation once registration is complete.
- **Manually Approve**: When this option is selected, the webinar host will need to approve every registration.

To save the settings, click **Save All**.

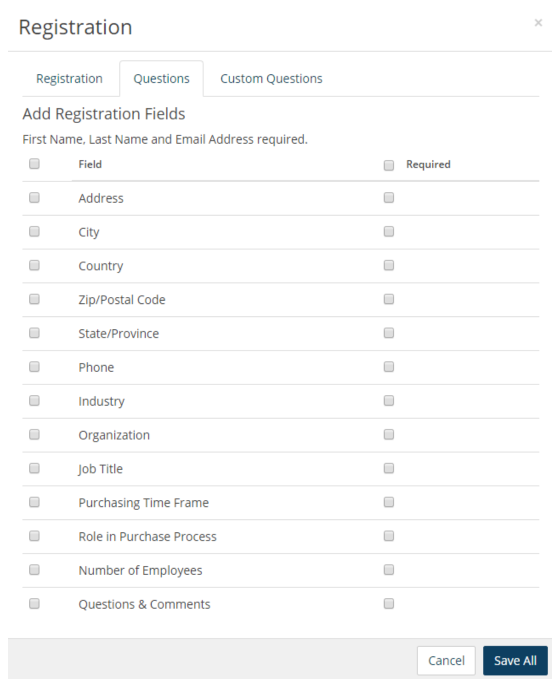


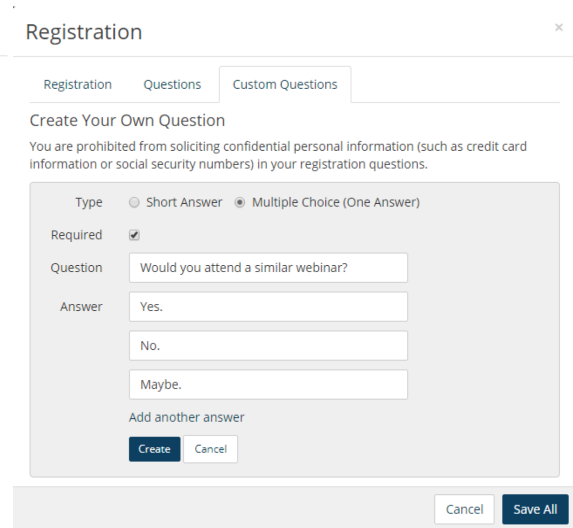
Questions and Custom Questions

Edit the **Questions** tab to add pre-defined questions into the RingCentral Webinar registration. Select the fields that will appear on the registration page and set the required fields. Check the **Required** field if any question field is mandatory.

Use the **Custom Questions** tab to create customized questions that are either short answer or multiple choice.

To save the settings, click **Save All**.



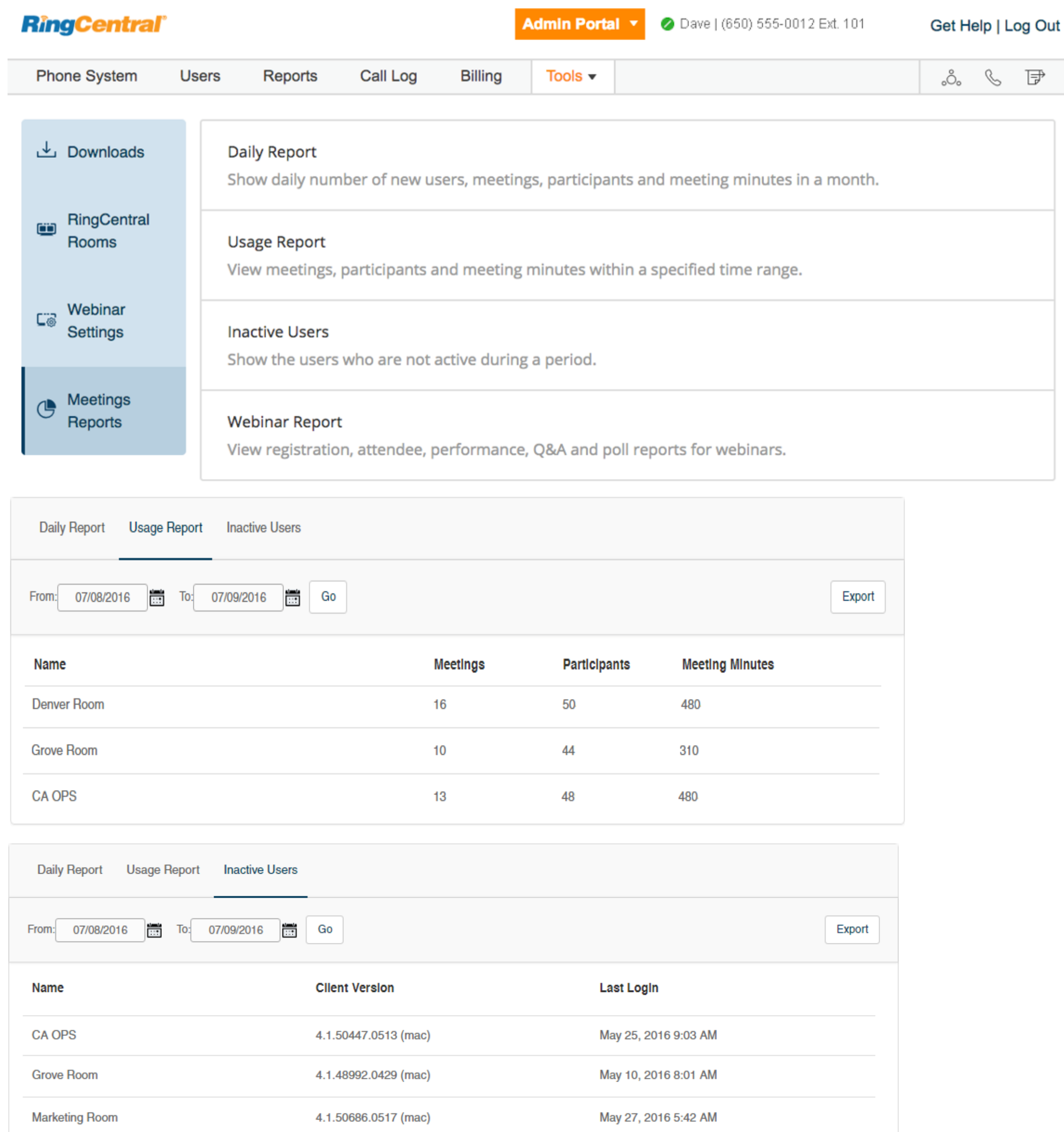


View Meetings Reports

Meetings Reports helps administrators optimize the operation of RingCentral Meetings by presenting usage analysis and trending metrics in an easy-to-read graphical format. You can view the following reports:

- Daily Report: provides metrics for each day in the specified month, including the number of new users, meetings, participants, and meeting minutes.
- Usage Report: two types of reports are available: you can sort by Meetings or by users. Provides metrics for a specified range of dates, including meeting topics, participants, and meeting duration.
- Inactive Users: provides information about inactive Meetings users during a period of time.
- Webinar Report: allows you to generate reports for specific Webinars. Available reports include:
    - Registration Report: displays a list of registrants and their registration details.
    - Attendee Report: displays details about each attendee.
    - Performance Report: displays engagement statistics on registration, attendance and feedback.
    - Q&A Report: displays questions and answers from the webinar.
    - Poll Report: displays each attendee poll result.

Click **Export** to export a report.



Meetings Settings

RingCentral Meetings settings provide admins and users more granular control of the user experience of RingCentral Meetings in their enterprise. You can use these settings to control the enablement of new features (default to off) to better manage changes in user experience for users.

The following Meeting settings are available:

Admin > account level settings

Configured in: the Admin portal in your online account.

Accessed from Tools > Meetings > Meetings settings

Admin > each user setting (user level)

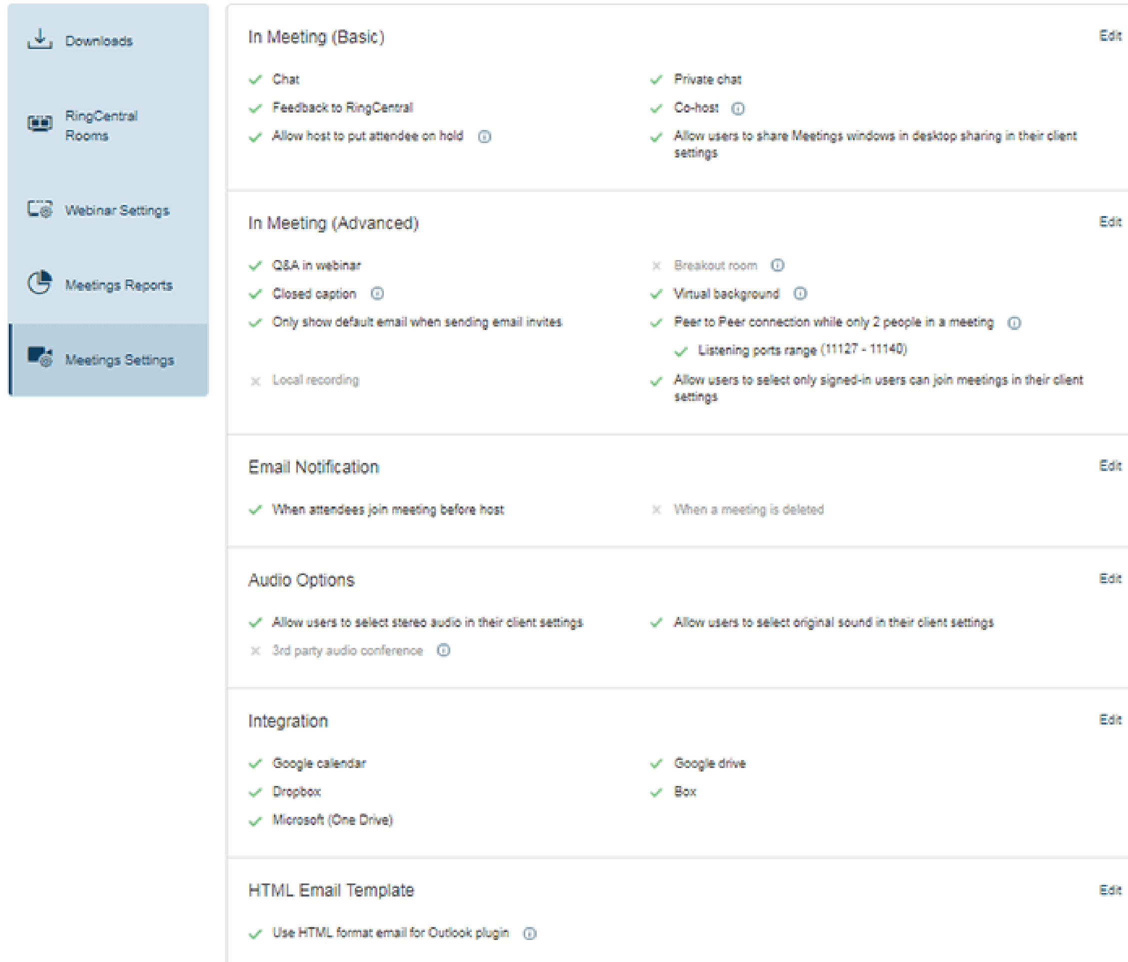
Configured in: the Admin portal in your online account.

Accessed from Users >(Choose a user) > Meeting > edit

User > user setting (user level)

Configured in: My Extension in your online account.

Accessed from Settings > Meetings



Configure Meetings Settings

Table 1 lists the RingCentral Meetings settings that an admin or user can configure in the online account.

Table 1: RingCentral Meetings Account and User Level Settings

Setting	Default value	Description	User Level?	Account Level?	Webinar Support?
Personal Meeting ID	Sync with client	Only paid user can change the value of the Personal Meeting ID. The value will sync to the client PMI setting. Free users can only see the value.	Y	N	N
Chat	On	The in-meeting chat allows you to send chat messages to other users within a meeting. This setting controls whether you can send a message to an entire group. A user may want to forbid to chat in his or her meeting, or an admin may want to forbid to chat in all meetings.	Y	N	N
Private Chat	On	The in-meeting chat allows you to send chat messages to other users within a meeting. This setting controls whether you can send a private message to an individual user. A user may want to forbid private chat in meetings.	Y	Y	N
Feedback to RingCentral	On	User may want to hide the option "I'd like to give feedback to RingCentral" after each meeting.	Y	Y	N
Co-host	Off	The Co-host feature allows you to assign another user in the meeting hosting privileges.	Y	Y	Y
Allow host to put attendee on hold	Off	In meeting, host can put somebody on hold. Then the person who is on hold can't hear any audio from the meeting nor see any video or sharing content, until be resumed.	Y	Y	Y
Allow users to share Meetings windows in desktop sharing in their client settings	Off	As a sales and support employee, a user want to share his or her own Meetings windows.	N	Y	Y

Table 1: RingCentral Meetings Account and User Level Settings

Setting	Default value	Description	User Level?	Account Level?	Webinar Support?
Q&A in webinar	On	If the option is disabled, there isn't the option for attendees to ask questions in the webinar. The admin may want to disable Q&A in all webinars.	N	Y	Y
Breakout room	Off	Breakout rooms allow you to split your meeting into up to 50 separate sessions.	Y	Y	N
Closed caption	Off	Closed captioning allows you or another attendee within a meeting to add closed captioning in a meeting or webinar.	Y	Y	Y
Virtual background	Off	The virtual background feature allows you to display an image as your background during a meeting.	Y	Y	Y
Only show default email when sending email invites.	On	Allow users to invite participants by email using the default email program selected on their computer.	N	Y	N
Peer to Peer connection while only 2 people in a meeting	On	An admin may want to forbid a P2P connection, or restrict the port range.	N	Y	N
Allow users to select only signed-in user can join meeting	Off	A user may want to prevent those people without a RingCentral account from joining the meeting.	N	Y	N
Email notification: When attendees join meeting before host	On	User can disable if user does not require a notification.	Y	Y	N
Email notification: When a meeting is deleted	On	User can disable if user does not require a notification.	Y	Y	Y
Allow users to select stereo audio in their client settings	Off	Enable Stereo Audio allows you to send audio in stereo during your meetings and webinars, if your microphone can process audio in stereo.	N	Y	Y
Allow users to select original sound in their client settings	Off	A user may want to preserve the sound from your microphone without using Meeting's echo cancellation and audio-enhancing features.	N	Y	Y

Table 1: RingCentral Meetings Account and User Level Settings

Setting	Default value	Description	User Level?	Account Level?	Webinar Support?
3rd party audio conference	Off	Once selected, 3rd party audio is exclusively used for a meeting.	Y	Y	N
Integration - Google calendar	On	In the client schedule page, a user can select Google calendar integration. If their company doesn't use Google calendar, the admin may think it unnecessary to provide the integration.	N	Y	N
Integration - Google drive / Dropbox / Box / OneDrive	On	Cloud storage share integration in the RingCentral Phone app. If their company doesn't use the cloud storage, the admin may think it unnecessary to provide the integration.	N	Y	N
Annotation	On	Meeting participants can annotate on a shared screen as a viewer. A user may want to turn off annotation.	Y	N	Y
Local Recording	On	Local recording allows users to record meeting video and audio locally to a computer. A user may want to turn off recording.	Y	Y	Y
Play sound on join/leave (heard by host or by host and attendees)	Off	User may want to the chime be played on join/leave per meeting.	Y	N	Y
Host key change	Off	User may want to change the host key, which can be used to claim host and start meeting from a H.323/SIP room system.	Y	N	N
Auto saving chat	Off	Auto-save chat will automatically save your in-meeting chat locally on your computer. As a host, a user may want to save every chat automatically.	Y	N	Y
Remote support	Off	Remote Support Session allows a meeting host to remotely control and restart a Windows or Mac computer.	Y	N	N
Far end camera control	Off	Far End Camera Control allows another user to take control of your camera and use Pan-Tilt-Zoom (PTZ) functionality of the camera.	Y	N	N

Table 1: RingCentral Meetings Account and User Level Settings

Setting	Default value	Description	User Level?	Account Level?	Webinar Support?
Dual camera share	Off	Screen sharing a camera input allows for sharing a camera connected to your computer. This will allow using two cameras at once during a meeting.	Y	N	Y
Attention tracking	Off	As a host, user can see an indicator in the Participant panel of a meeting or webinar if an attendee does not have Meetings in focus more than 30s while someone is sharing a screen.	Y	N	Y
Waiting room	Off	The Waiting Room feature allows the host to control when a participant joins the meeting.	Y	N	N
Automatic recording	Off	A user may want to start local recording automatically when the meeting starts.	Y	N	Y
Invitation email template	Off	A user may add some content at the end of the email template.	Y	Y	N
Use HTML format email for Outlook plugin	Off	User may want to use HTML format email, which may be more readable and capable.	N	Y	N/A

Appendix A: Express Setup for Admins

Welcome to RingCentral

Welcome to the RingCentral business phone system! Once you have purchased the system, you'll receive an email to activate.

If this is your first login, it will take about 25 minutes to initially set up your account. As the administrator you'll be able to add users during the Express Setup or after you complete these steps. You will set up user profiles, set the company greeting, operator extension, and My Info profile. You'll also verify your regional setting, provide emergency calling location, and setup how you would like phone calls to be routed.

Note: *If you leave the Express Setup without finishing, the changes you have made might not be saved.*

You can learn more about user features through Knowledgebase articles.

Activate Your Account

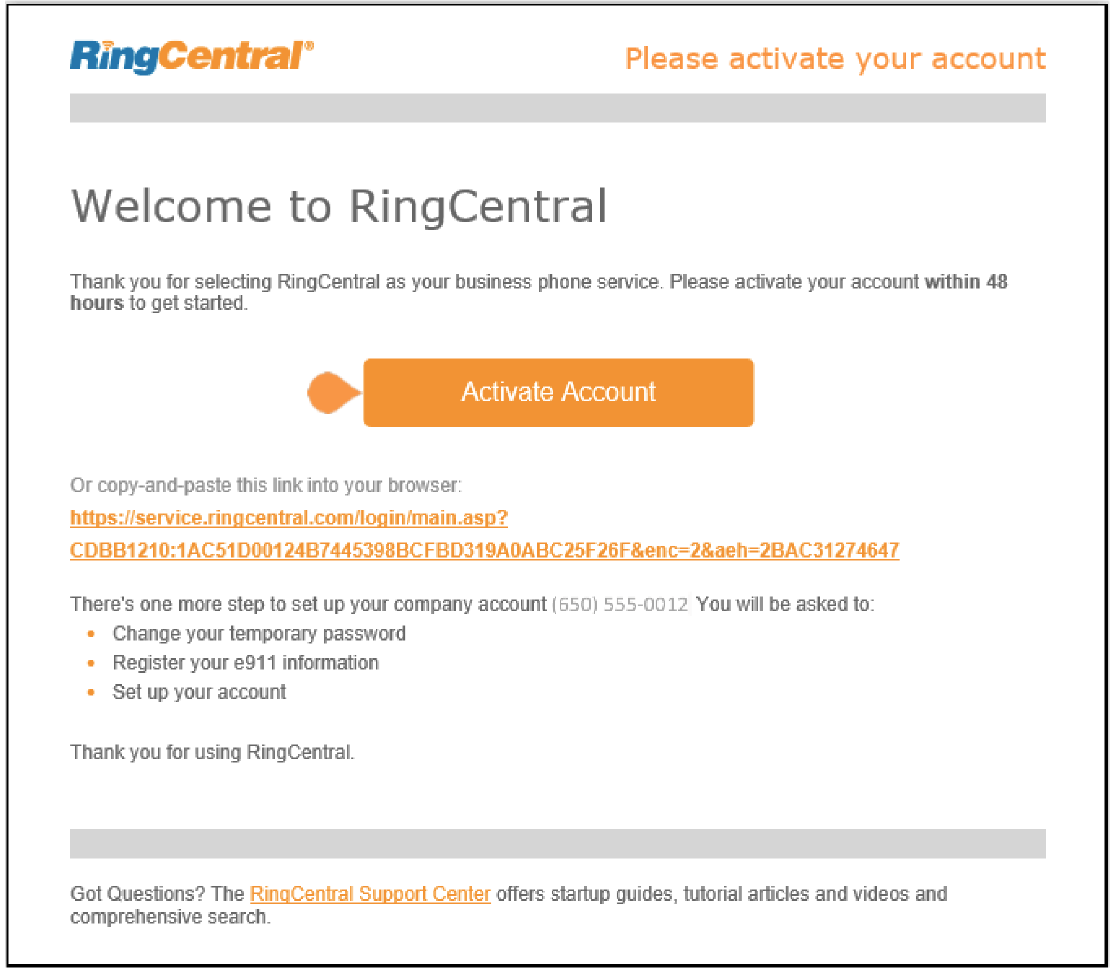
You will receive a Welcome Email after you have purchased a RingCentral system.

To start your setup,

1. Open the email message.

   The Welcome message appears.
2. To begin your set up, do one of the following:
   - Click **Activate Account**
   - Copy the link into your browser

The setup instructions continue on the following page.



Please activate your account

Welcome to RingCentral

Thank you for selecting RingCentral as your business phone service. Please activate your account **within 48 hours** to get started.

Activate Account

Or copy-and-paste this link into your browser:
https://service.ringcentral.com/login/main.asp?CDBB1210:1AC51D00124B7445398BCFBD319A0ABC25F26F&enc=2&aeh=2BAC31274647

There's one more step to set up your company account (650) 555-0012 You will be asked to:

- Change your temporary password
- Register your e911 information
- Set up your account

Thank you for using RingCentral.

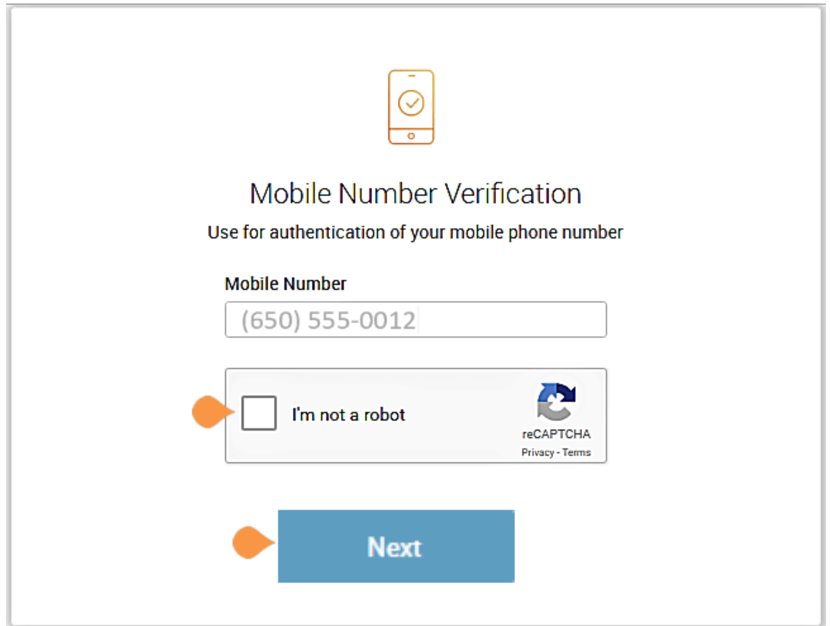
Got Questions? The RingCentral Support Center offers startup guides, tutorial articles and videos and comprehensive search.

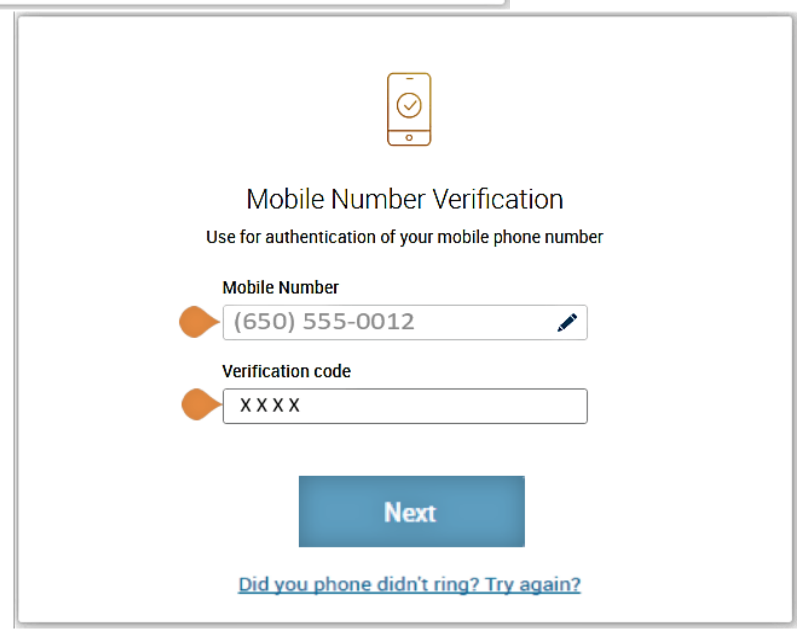
Your Account Security

After clicking **Activate Account**, authentication begins with a mobile number verification.

1. Click the **I'm not a robot** box, then **Next**.

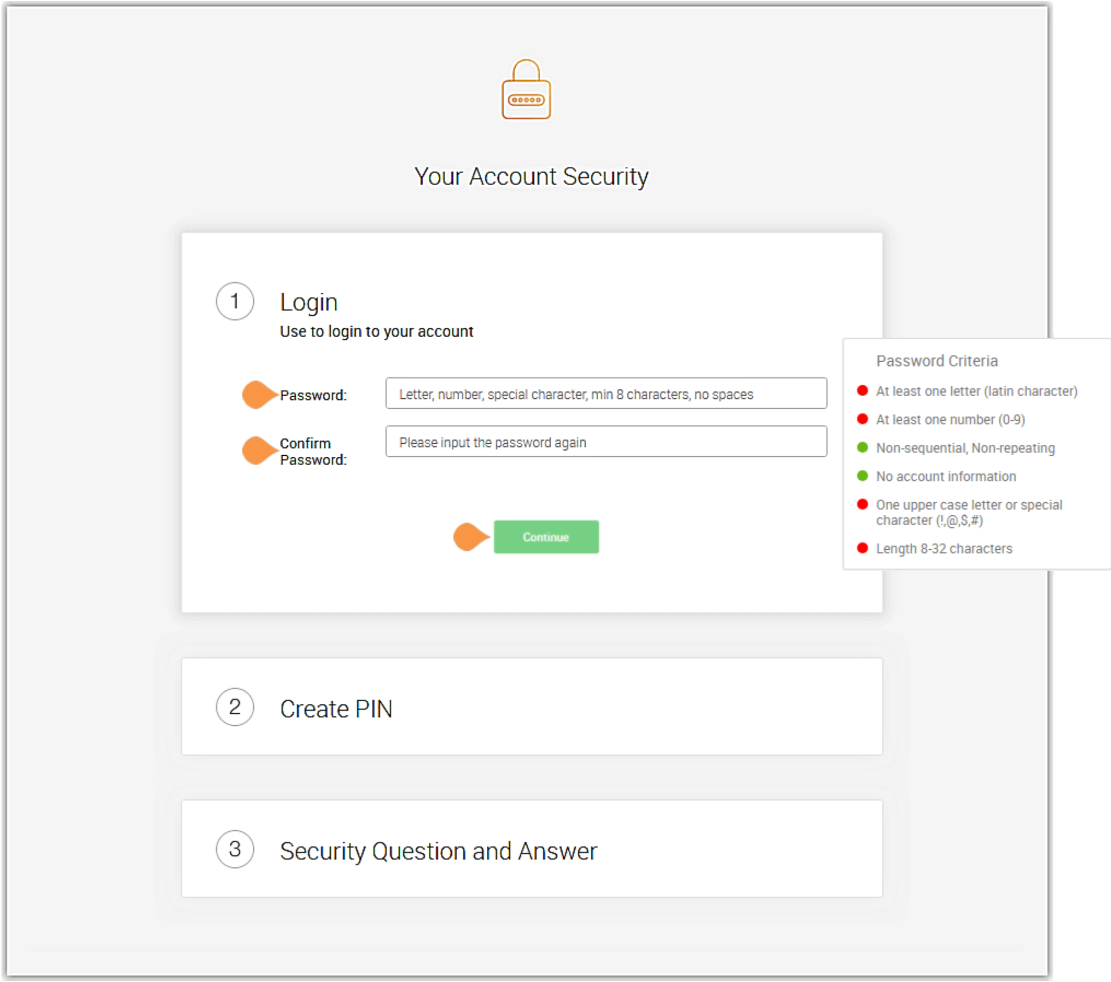
   A message informs you that you'll be receiving a phone call providing you with a verification code.
2. Enter the verification code.
3. Click **Next**.





A window opens for you to enter three account security settings:

- A password
- A PIN (Personal Identification Number)
- A Security Question and Answer



Create Your Password

Passwords and Security Questions on your online account maintain your account's confidentiality and privacy. The **PIN** is used to verify the User's identity when checking voicemail. The **Security Question and Answer** is requested by the RingCentral agent when contacting Customer Care.

Follow the on-screen prompts. For each security setting, certain requirements must be met. For your convenience, these requirements are listed next to the setting as you enter the information.

Note: If your extension is configured as a Google tagged account, your Express Setup will have different setup options. For information about setting up and using Google-tagged accounts, see the RingCentral for Google User Guide.

4. Create your **Password**.

   Follow the requirements listed next to the **Password** and **Confirm Password** fields. A green check mark indicates when you have met a requirement and all requirements must be met for the password to be accepted.
5. After you **Confirm Password**, press **Continue**.

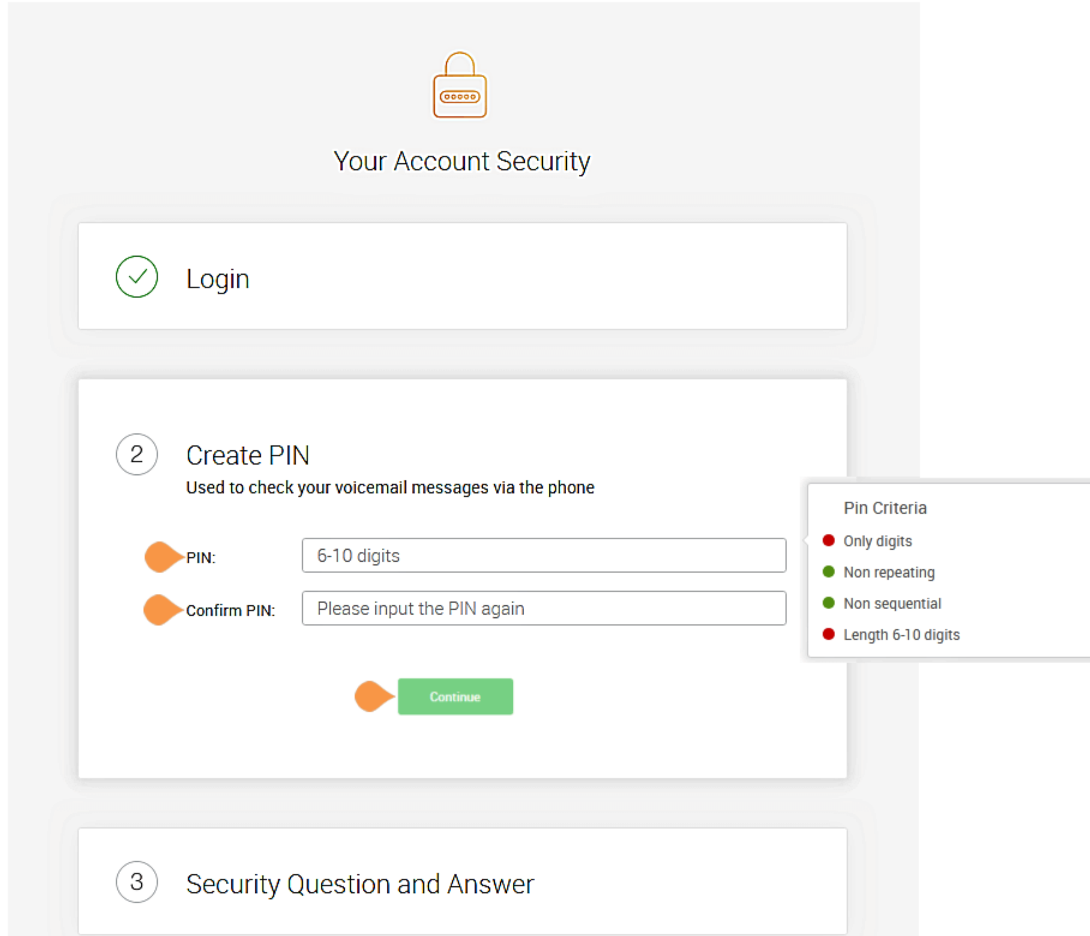
Set Your PIN

The next step in **Your Account Security** is to set your PIN.

6. Create your **PIN**.

   Follow the requirements listed next to the **PIN** fields. A green check mark indicates when you have met a requirement. All requirements must be met before the PIN is accepted.

   You'll need this PIN when checking voicemail.
7. Press **Continue**.



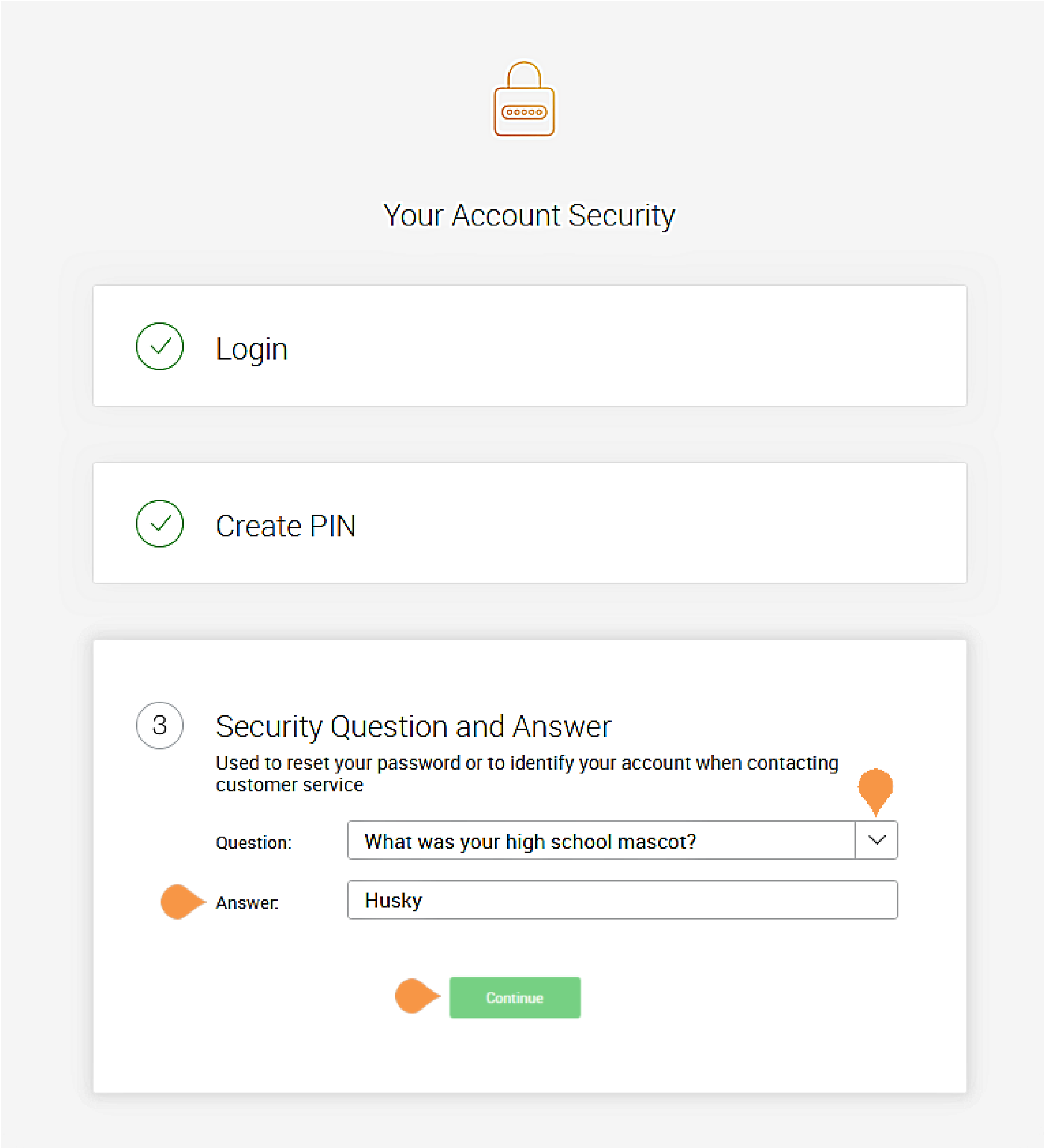
Set Your Security Question and Answer

The last step in **Your Account Security** is to select a **Security Question and Answer**.

Note: *You will be asked for your* ***Security Question and Answer*** *each time you contact RingCentral Global Customer Care. Keep a record of the question and answer for future reference.*

8. Select one of the questions listed in the **Security Question and Answer** menu.
9. Enter your answer to the security **Question** in the **Answer** field.
   Note: Your answer must be at least four letters.
10. Press **Continue**.

Should you lose your password, PIN, or Security Question, see this Knowledge Base article, "Changing a User's Password, Pin, or Security Question."

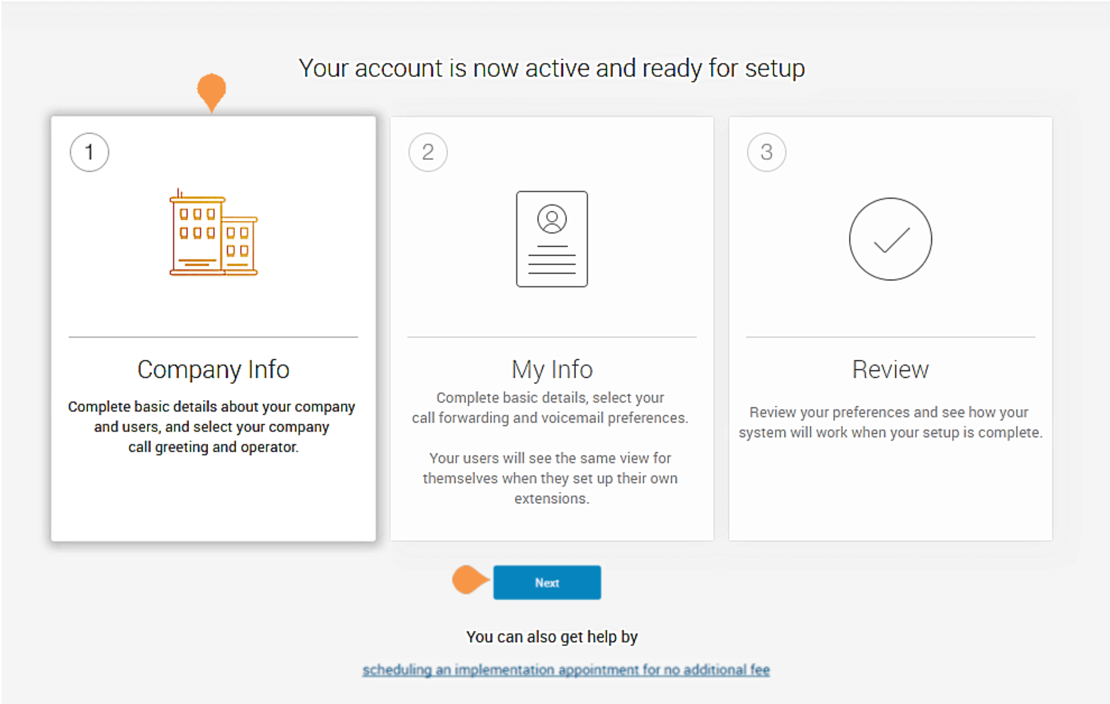


Your Company Account is now ready for setup

The next steps include setting up basic details about your company, users, call greeting and operator.

Your company's main number was assigned by RingCentral at the time of purchase in **System Setup**. At that time, your company number and fax number could have been changed. You can change the company and fax number by logging into your account after setup and navigating to the **Settings** > **Phone System** configuration tab.

11. Click **Next**.



Setting up Users

In this step, you'll complete information about your users.

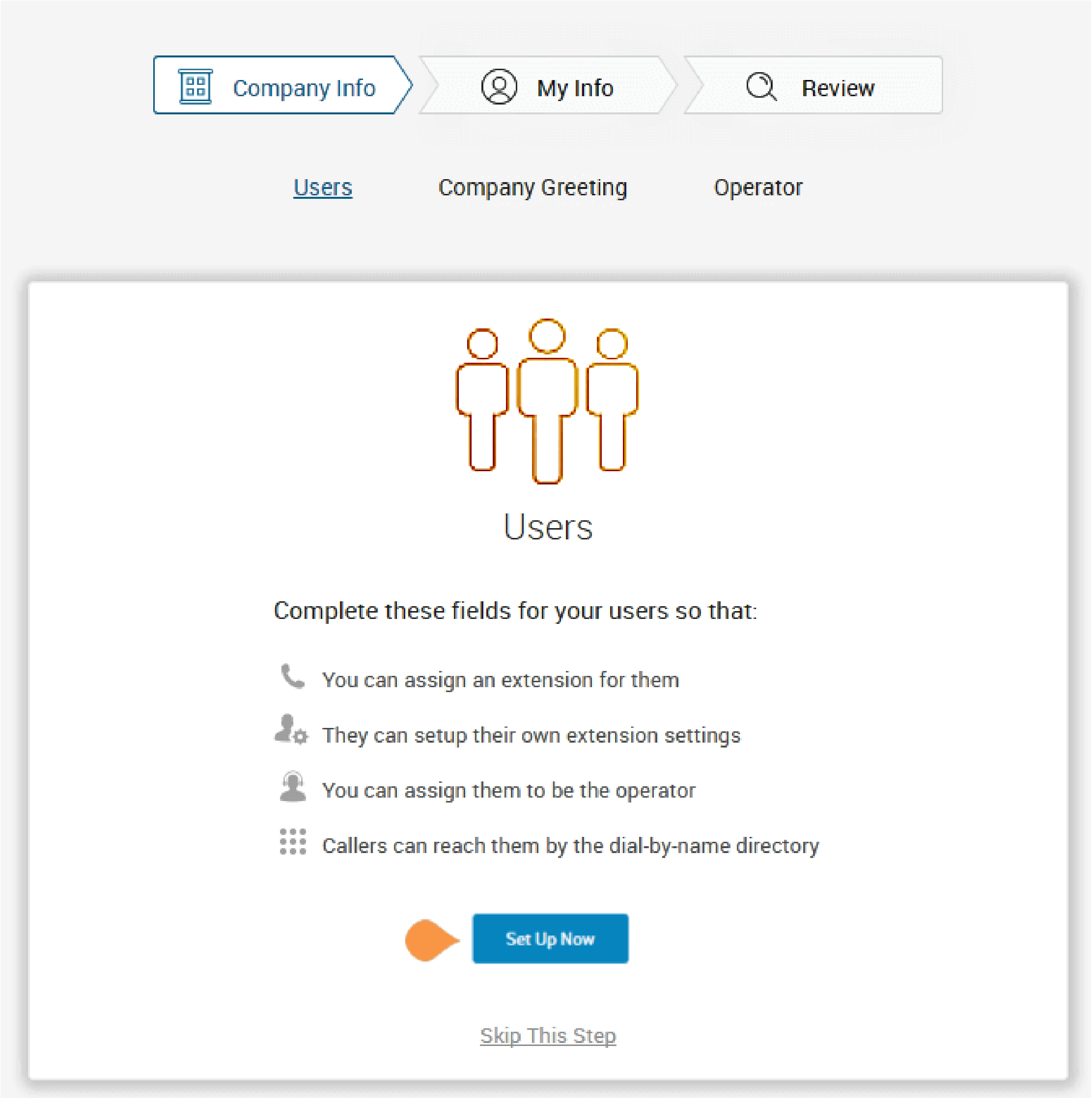
- Assign user extensions
- Enable users to change their own extension settings
- Assign an operator
- Add users to the dial-by-name directory

12. Before you click **Set Up Now**, have information ready, such as, first and last names, email addresses, contact numbers, for each user.

Note: If you click **Skip This Step**, the setup continues to "Company Greeting" on page 268.

As you set up users, each of them will be sent a "Welcome Email" so they can begin setting up their extension.

13. Click **Set Up Now**.



Set up User Profiles

In this step, you'll assign your users to a device.

When purchasing the RingCentral system, a number of phones or lines were bought for your account. Here you'll enter the details for those phones purchased.

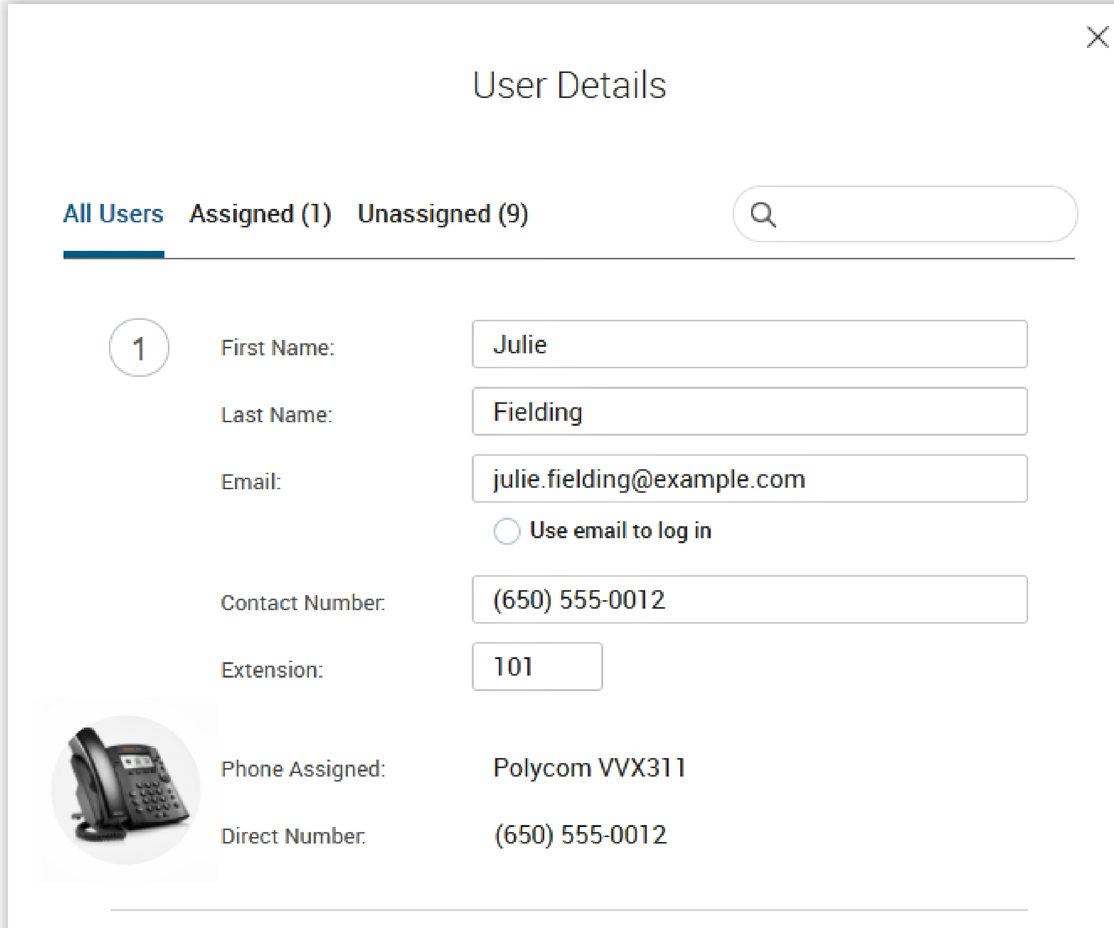
Enter the details for each of your users. This information is used for the company directory. Except where noted, this information is set by the administrator.

- First Name
- Last Name
- Email
- Enable Email to log in - The email address entered must be used for only one person and cannot be associated with more than one person or phone number.

If **Use email to log in** is not checked, the user can only log in with their phone number.

- Contact Number
- **Extension** (provided by RingCentral)
- Direct Number
- Scroll down to complete each User Details profile. Any User you do not assign at this time can be added to the system later. Go to the Users tab in the Admin Portal and click Add User.

14. When you are finished, scroll down and click **Next**.



Company Greeting

In this step, you'll set the greeting callers will hear when they dial your company's main number.

The default company greeting is shown in text below the playback controls. You can either use the default greeting or customize it.

If you choose to record a custom greeting, it can be recorded now or later.

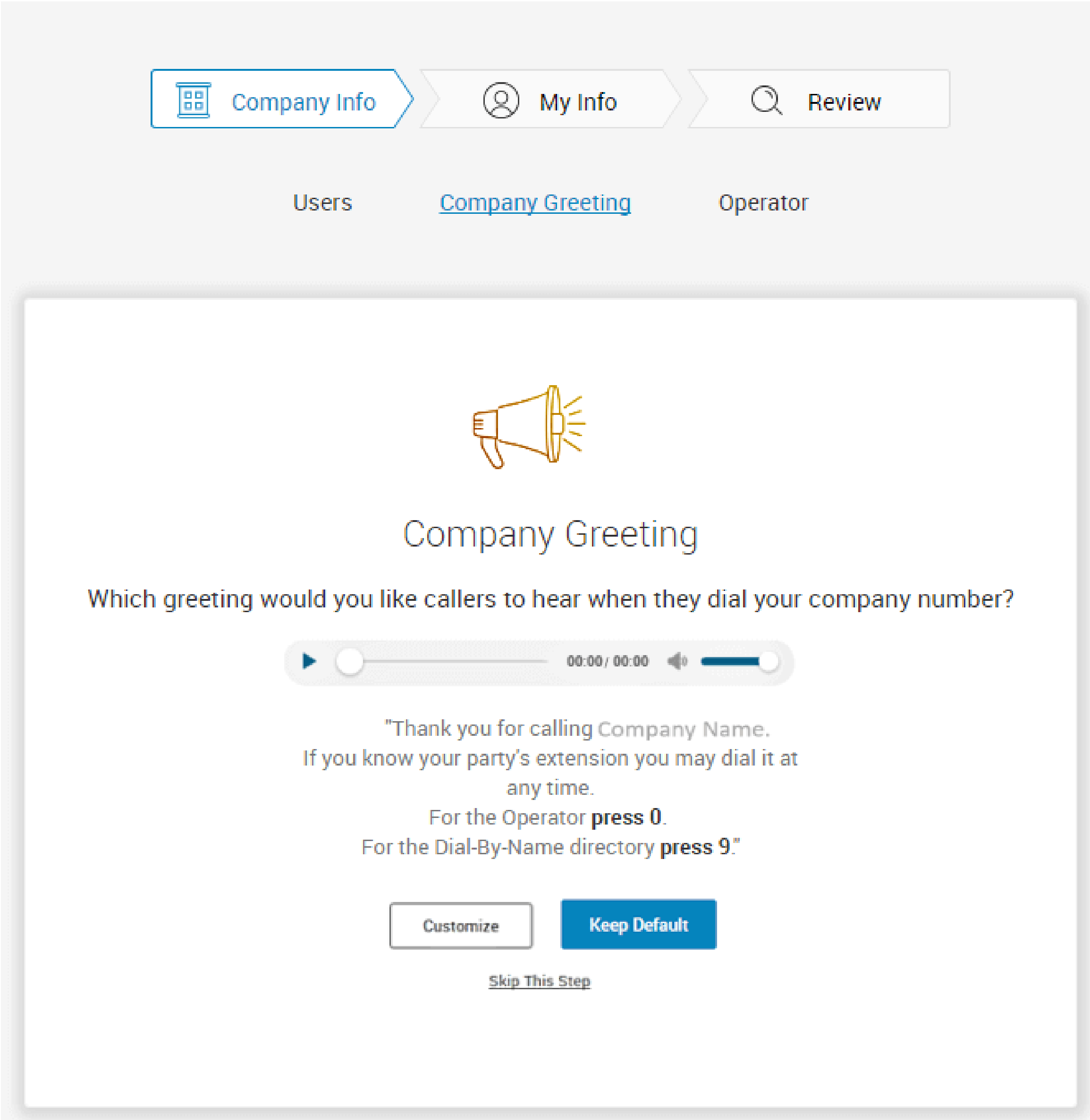
15. To skip this step now and record it later, click **Keep Default** and go to **"Set the Operator Extension" on page 269**.

To customize your company greeting, click **Customize**.

Select **RECORD OVER THE PHONE** or **IMPORT**.

- To RECORD OVER THE PHONE, follow the on-screen instructions to record your greeting. When you are finished, click **Next**.
- To IMPORT a WAV or MP3 file, click IMPORT, then browse and attach the filename.

When you are finished, click **Next**.



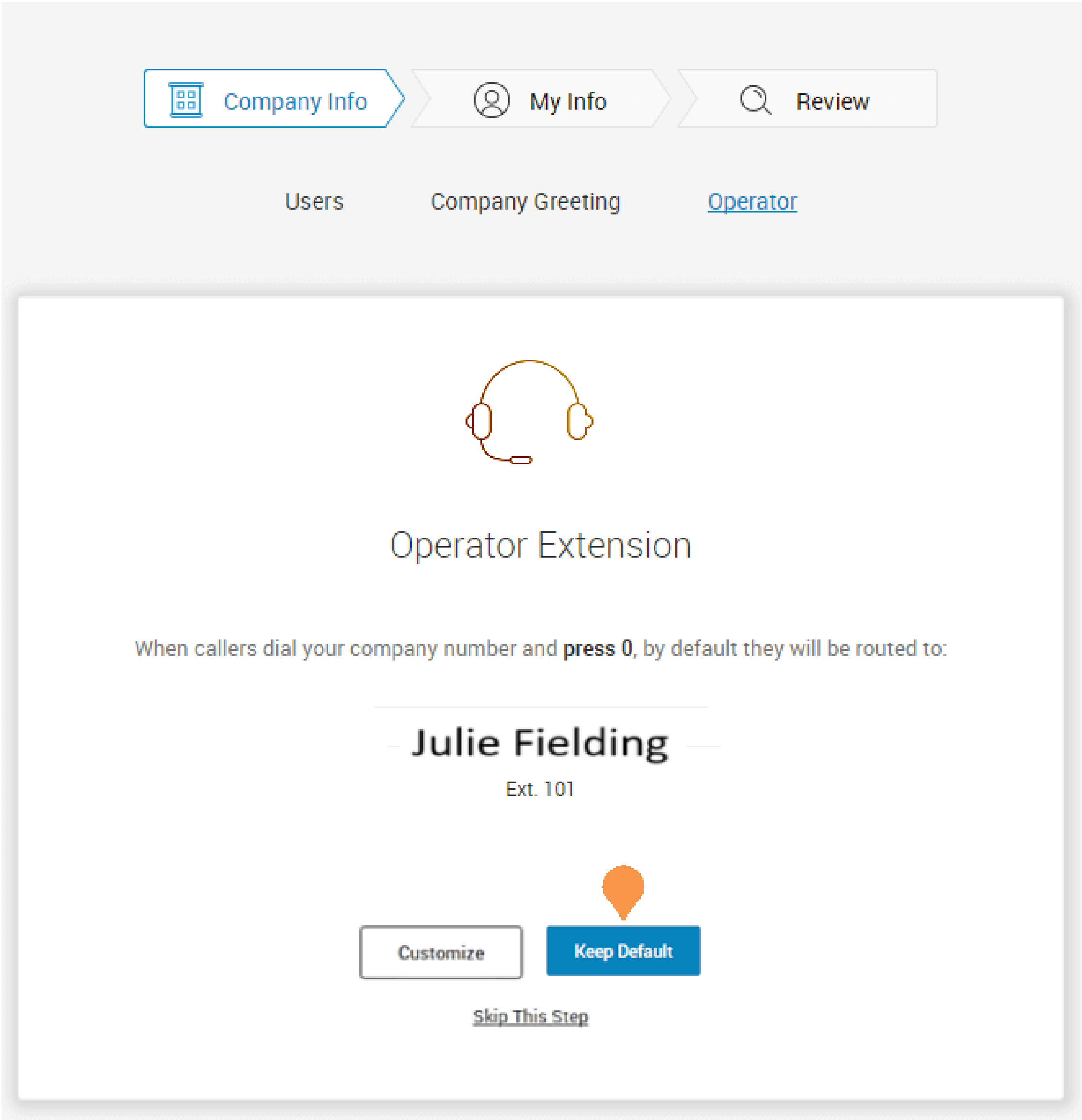
Set the Operator Extension

When callers dial your company number and press 0, the call is routed to the extension you designate.

Extension 101 is the Operator extension by default. You may reassign the Operator extension to other numbers in the system.

Note: Extension 101 has specific account authority. See the RingCentral Office Admin Guide for more information.

16. Select **Customize** or **Keep Default**.
    - To change the Operator Extension, click **Change Operator**, then select a different extension number.
    - You can also reassign the operator extension after setup. See the RingCentral Office Admin Guide for instructions.
17. Click **Keep Default**.



Verify My Info Profile

For this step, you'll make sure that your own information is correct.

18. Verify your information.

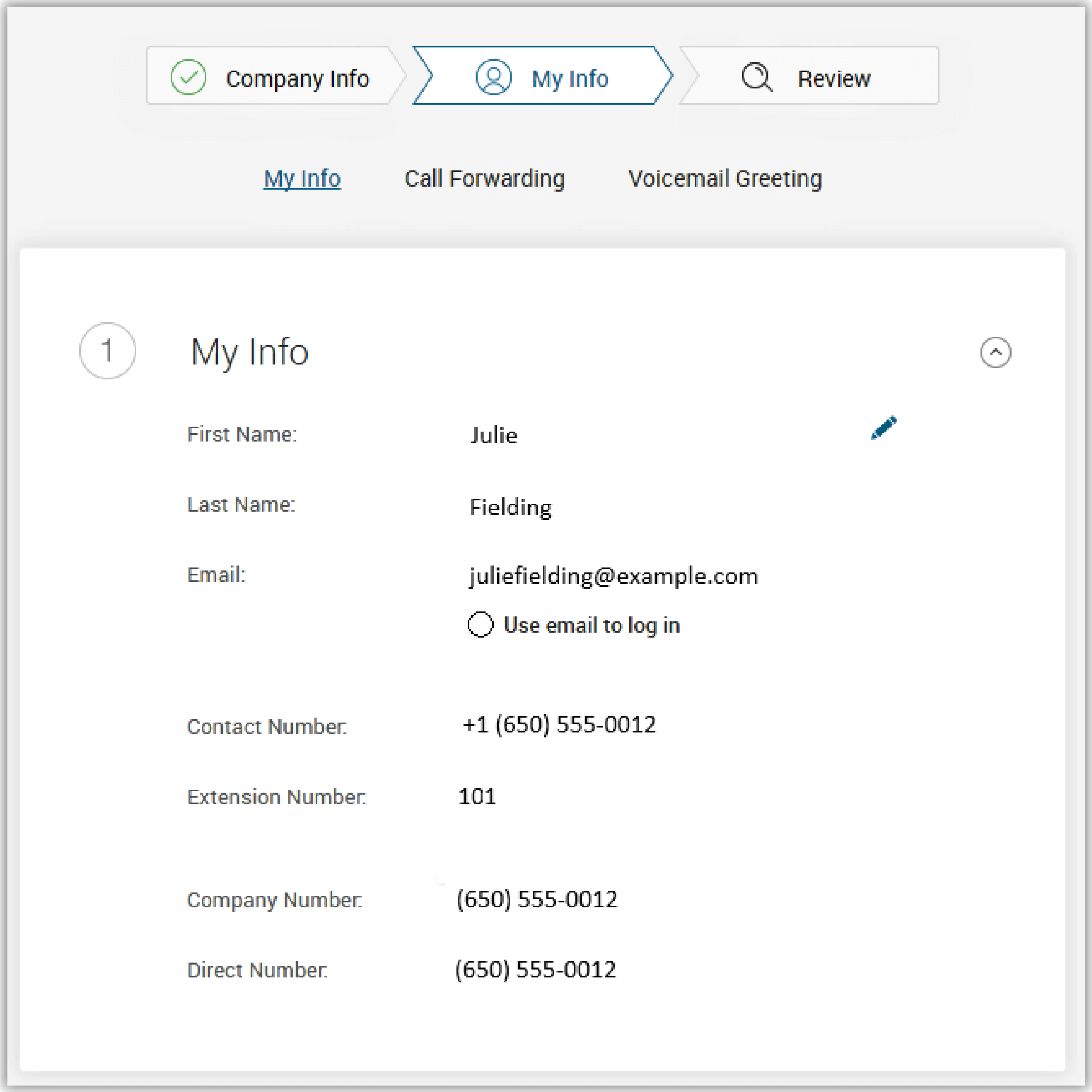
    If it is not correct, update it.

    - The name shown in your **My Info** will appear in your company directory for others to contact you.
    - Select **Use email to log in** to enable login to your account using a unique corporate email address.

If **Use email to log in** is not checked, you can only log in with your phone number.

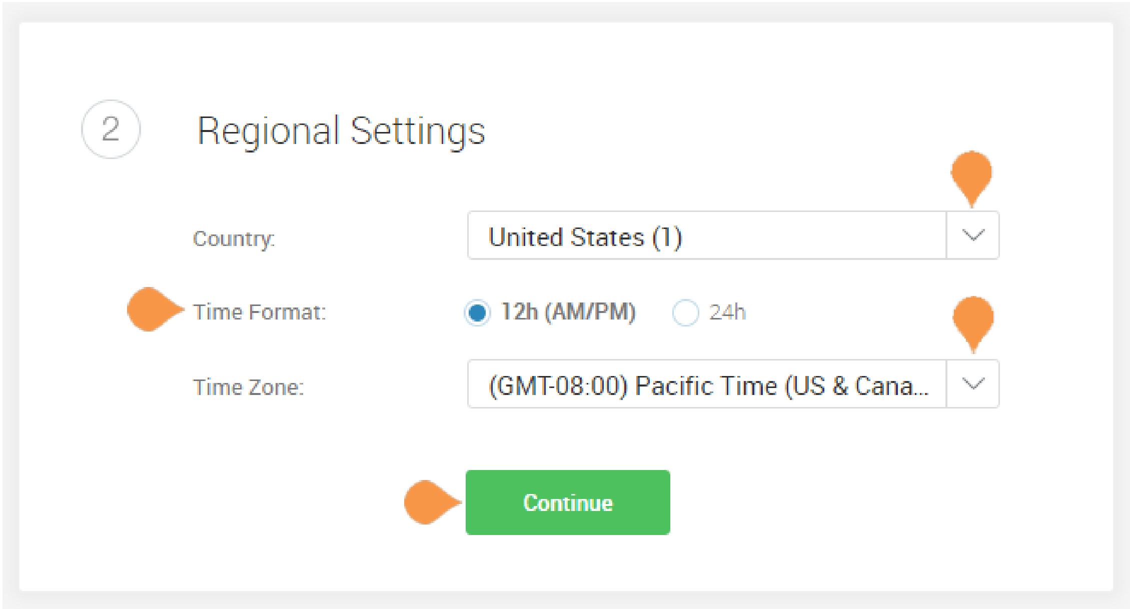
The email address must be used for only one person and cannot be associated with more than one person or phone number.

19. Scroll down to **Regional Settings**.



Check or Reset your **Regional Settings**

20. Verify **Regional Settings** specified for your account. These are: **Country**, **Time Format**, and **Time Zone**.
21. Click **Continue**.

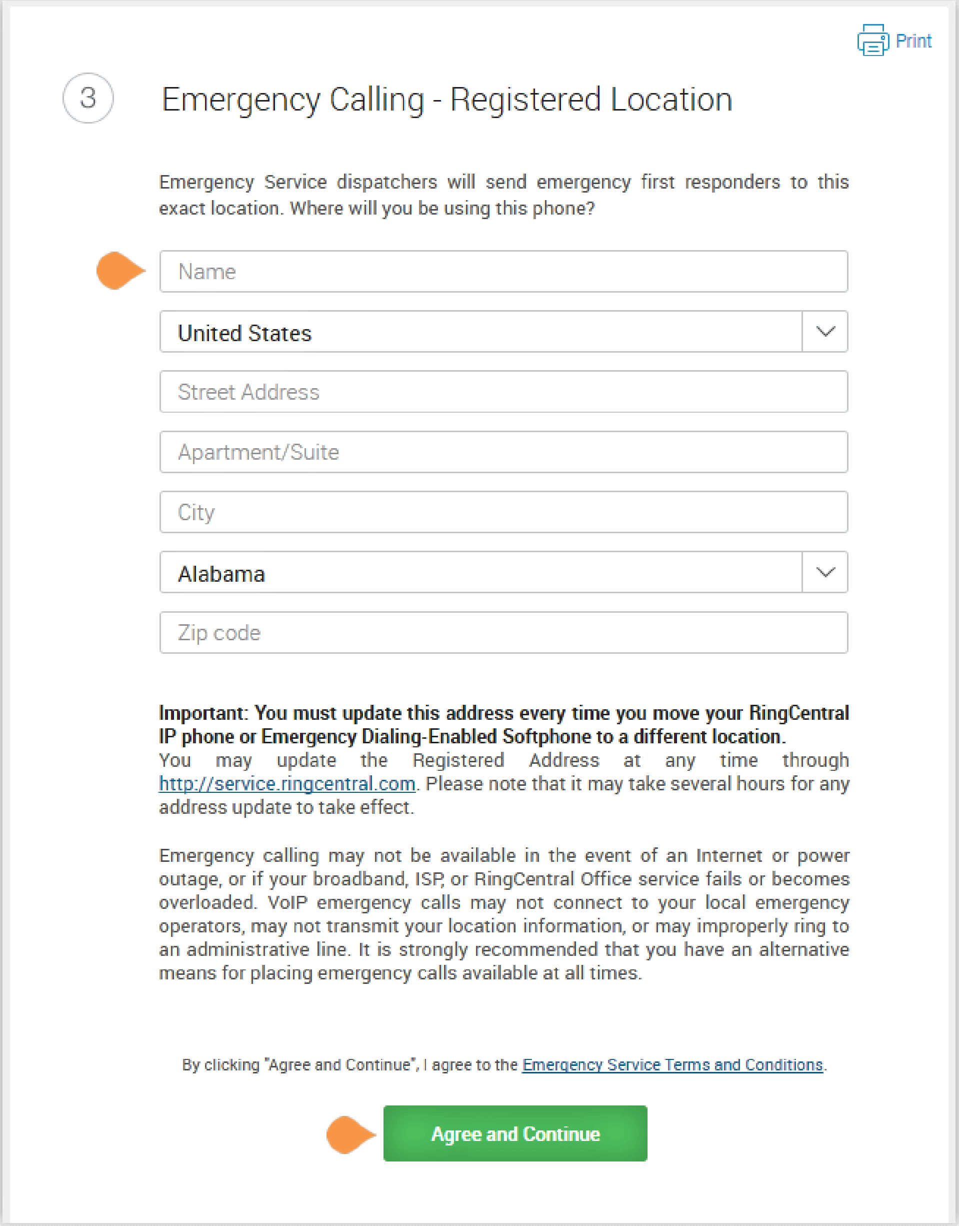


Emergency Calling - Registered Location

The **Emergency Calling - Registered Location** is the physical location of your phone that is using the RingCentral Digital Line. Emergency dispatchers (Emergency Call Service) will send first responders to this exact location.

For more information, see the Knowledgebase article, "Updating the Emergency Address."

22. Fill in the **Emergency Calling - Registered Location** form.
    - Enter your name
    - Enter your country
    - Enter your address
    - Enter your state
    - Enter your postal zip code
23. Read the agreement describing Emergency Calling - Registered Location.
24. Click **Agree and Continue.**



My Info > Call Forwarding

As a user, you can set up call forwarding rules for your extension. You can add up to 10 forwarding numbers for each extension assigned to you and set calls to ring sequentially or simultaneously.

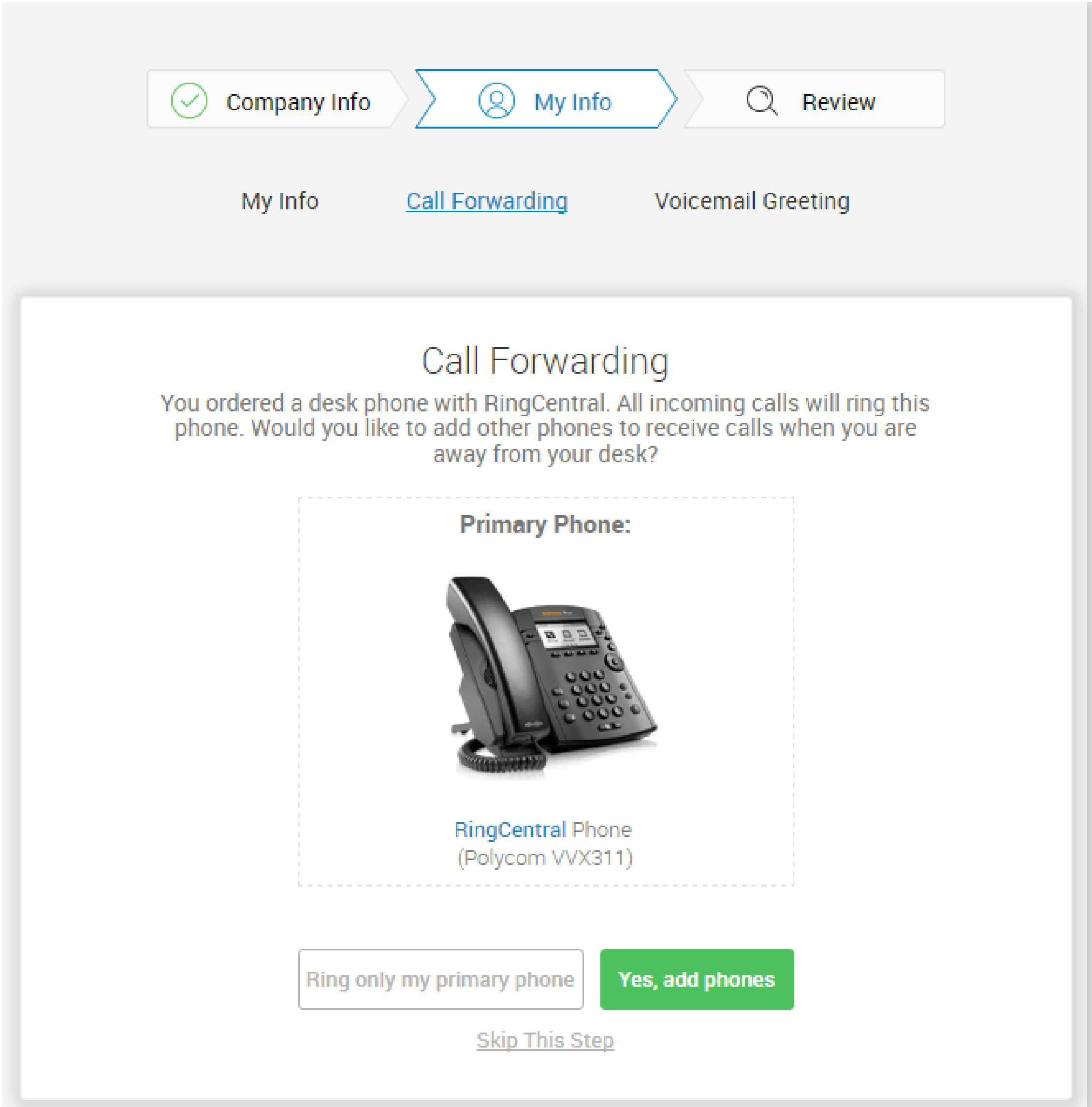
In this step you'll enable call forwarding to another number. First, note the phone extensions to which you might want to forward your calls.

You can either skip this step or set your phone to route your calls to another phone.

- To omit this step, click **Ring only my primary phone**. Then go to "My Info > Voicemail" on page 276.
- To add desk phones or a home phone (not mobile phone, see note) to which you can forward calls, click **Yes, add phones**.

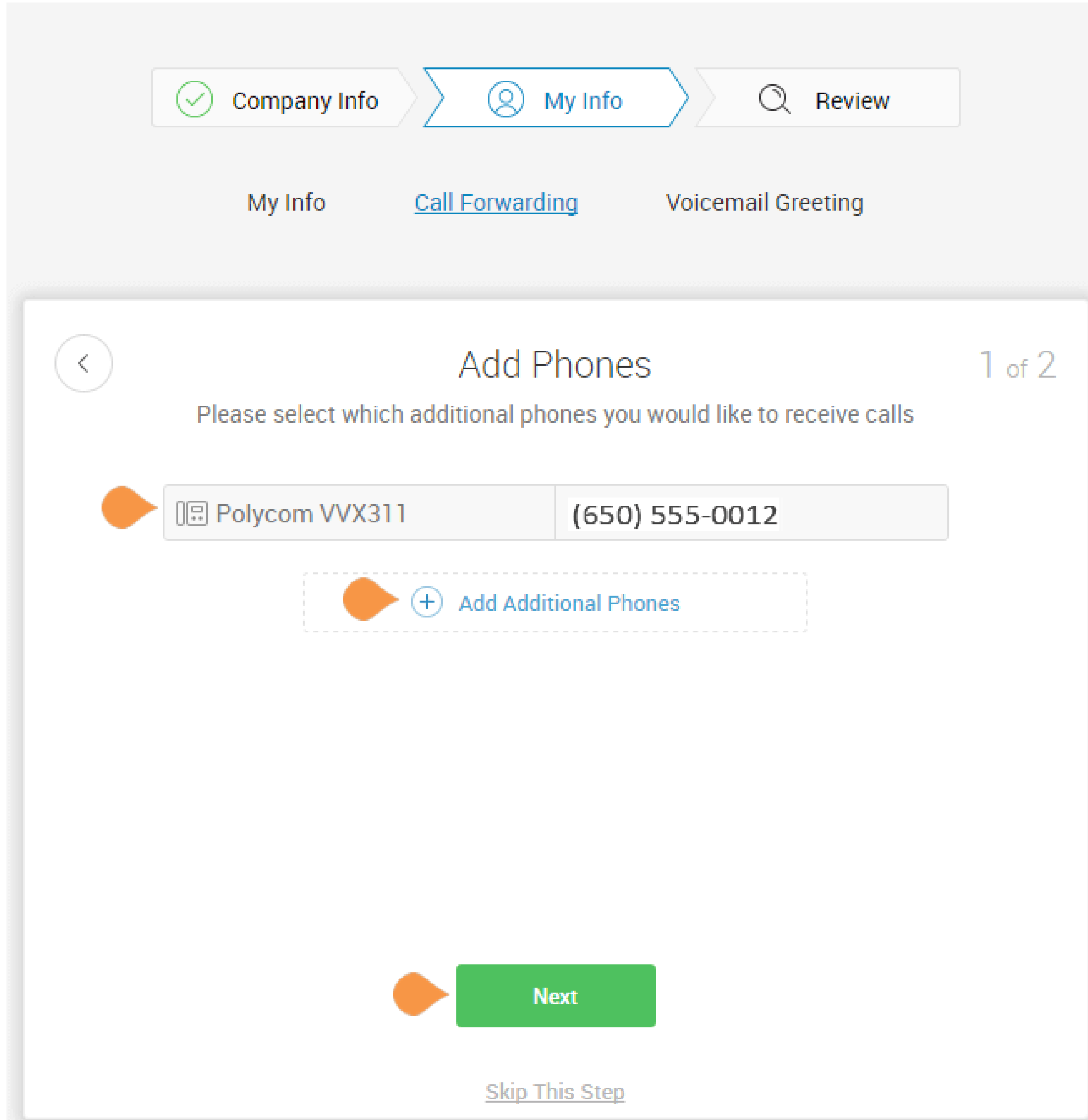
25. Click **Yes, add phones**.

Note: If you intend to use the RingCentral Phone app, do not enter the mobile number using these steps. The app's function is integrated into the RingCentral system.



Select additional devices (if any) you would like to ring when you receive an incoming call to your business number. Any purchased phone or your home number can be selected.

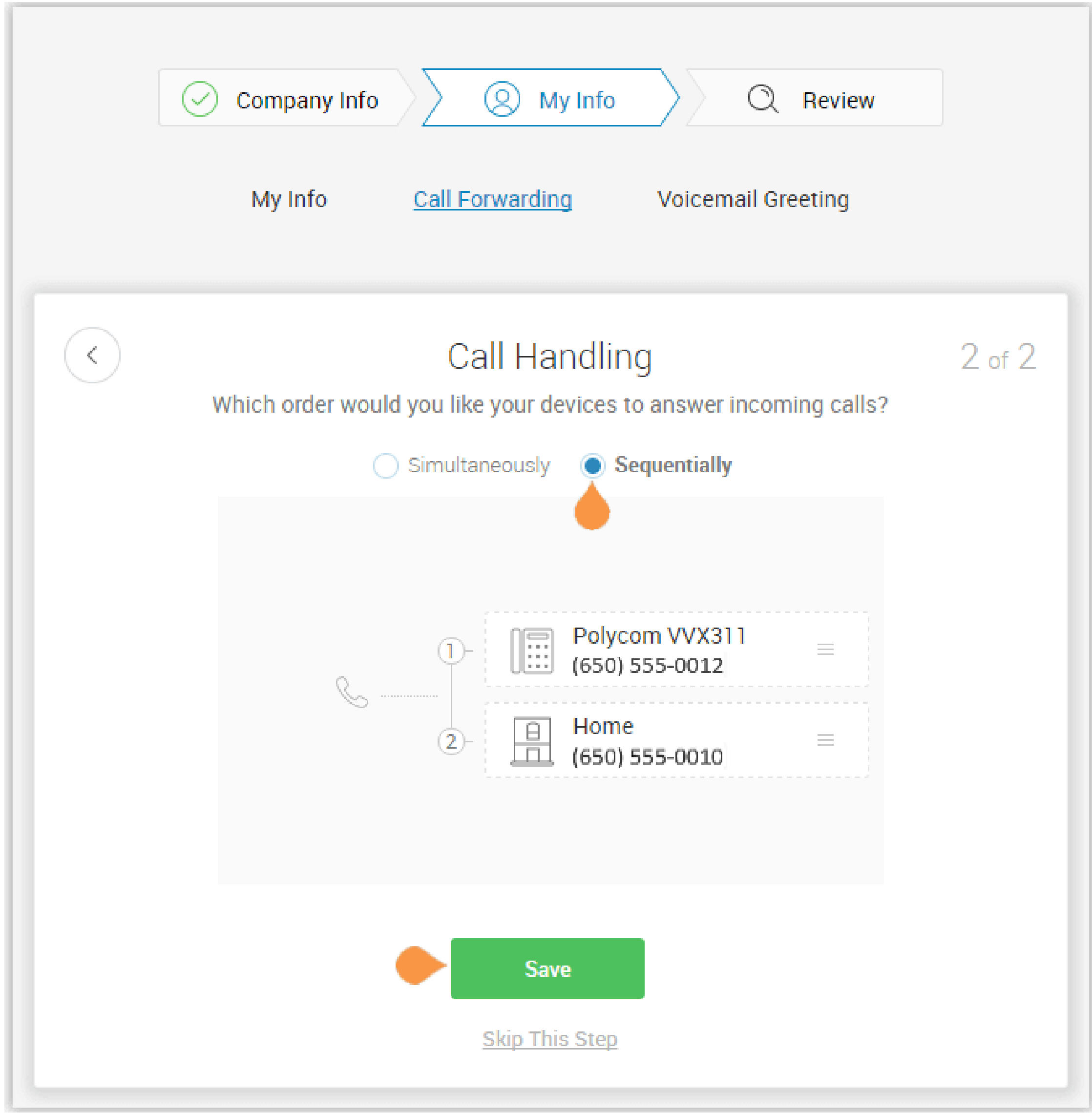
26. Select the phone to which the forwarded call will be sent.
27. Enter the number of the selected phone. Continue adding phones, by clicking **Add Additional Phones** as needed.
28. Click **Next**.



Call Handling - Simultaneously or Sequentially

29. Select whether the forwarded phones ring **Simultaneously** or **Sequentially**.
    - Select **Simultaneously** if you prefer the call to ring on all forwarded phones at the same time. Because of different networks, ringing to some devices, such as mobile devices may be delayed.
    - Select **Sequentially** if you prefer the call to ring on forwarded phones in a sequential order. Arrange the forwarding order by dragging up or down.
30. Click **Save**.

The setup instructions continue on the following page.



My Info > Voicemail

Now, set up the message your callers will hear when RingCentral forwards your calls to Voicemail. In this case, this is the voicemail for extension 101.

You can choose the default voicemail greeting or you can select "**Custom**" to record or import your greeting. See the default greeting text shown below the playback button.

To keep the default greeting, follow these steps:

- Click **Default**.

To keep the default, follow these steps:

- Click **Save** and skip to "Review Your Company Settings" on page 277.

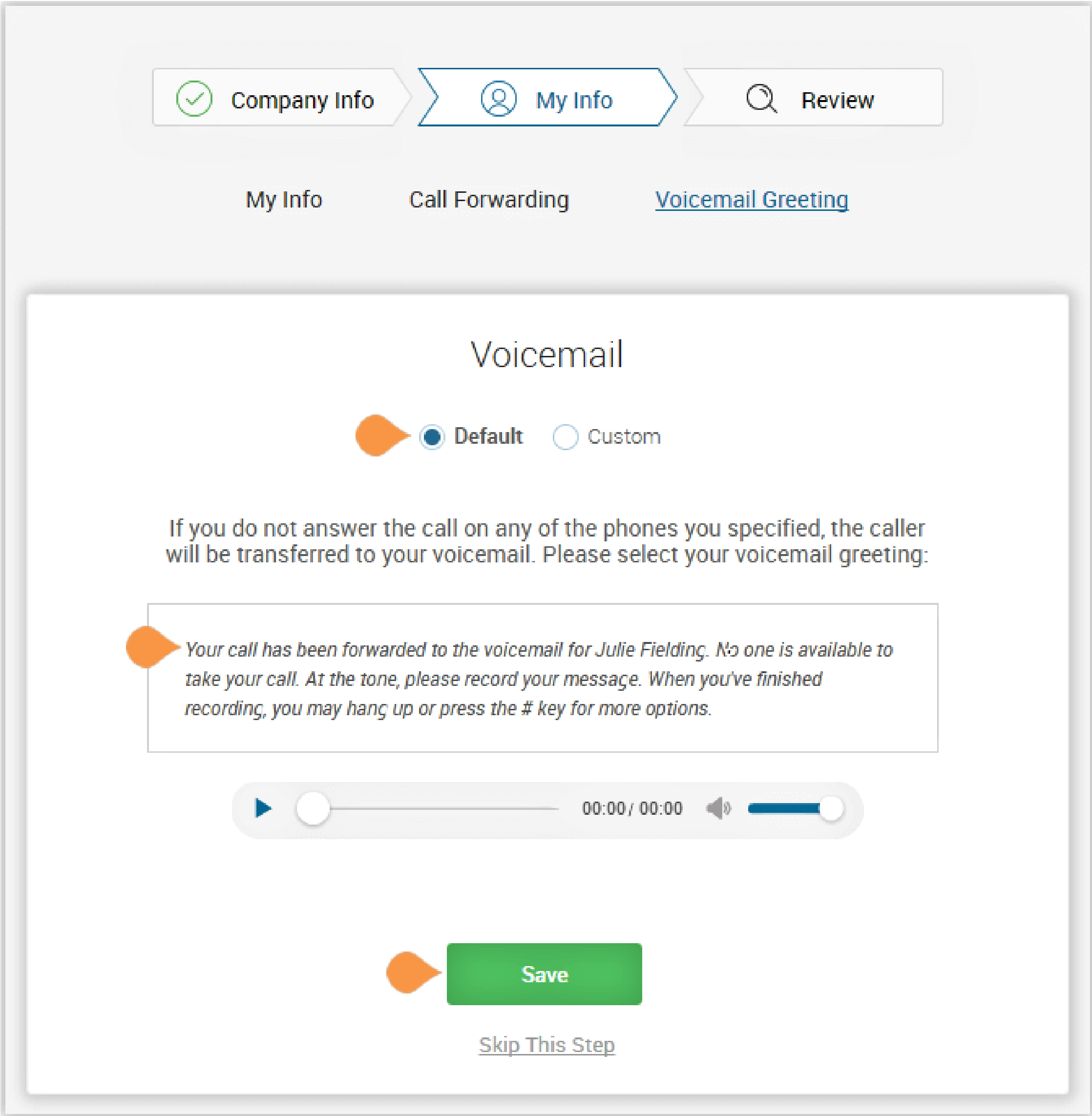
Record or Import a Voicemail Custom Greeting

31. To record or import a new greeting, click **Custom**.

    Record your greeting over the phone, or import a custom greeting.

    - To record your message over the phone, click **RECORD OVER THE PHONE**, enter a number in **Call me at** field and click **Call**.
    - To import a previously recorded message, click **IMPORT** and follow the instructions. (Use an MP3 or WAV formatted file.)

32. Click **Save**.

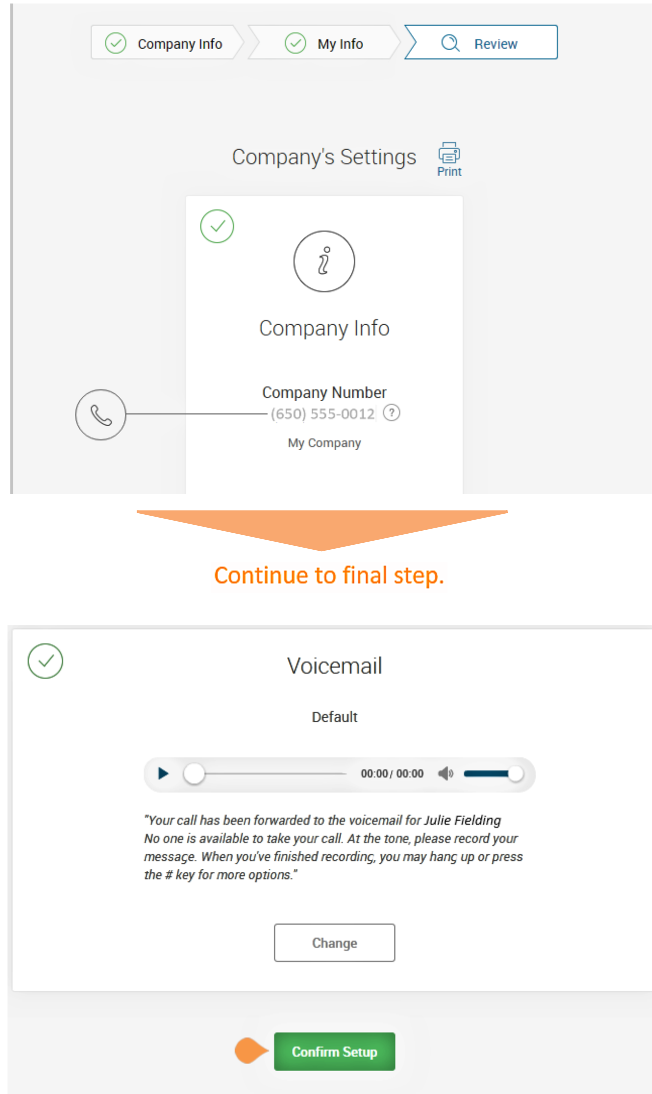


Review Your Company Settings

In this step, you'll review the settings set up. Check that these are correct. Continue scrolling to check or adjust all of the settings:

- Company Settings
- Company Greeting
- Users
- Operator
- The Operator Settings
- Call Handling
- Voicemail

If all settings are correct, click **Confirm Setup**.



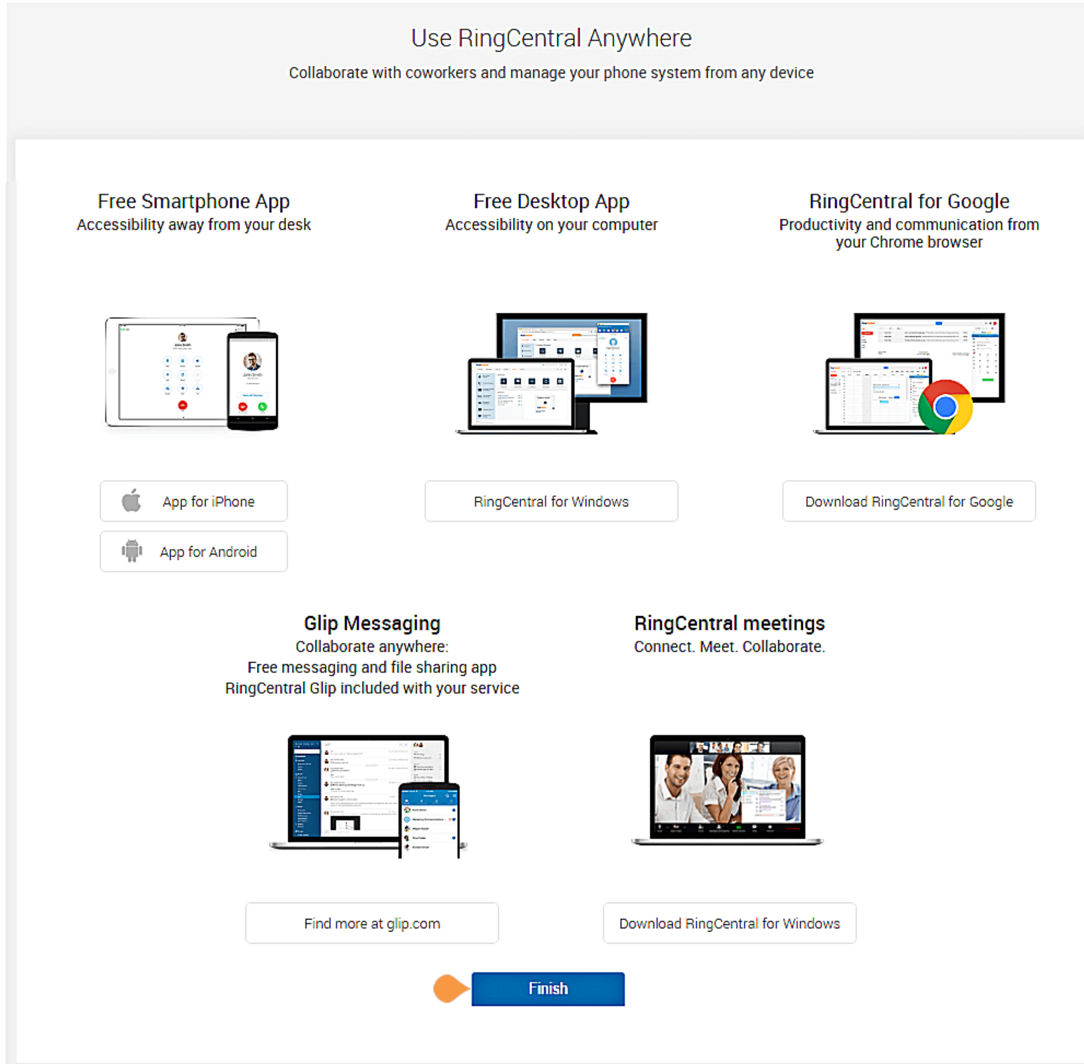
Use RingCentral Anywhere

Collaborate with co-workers and manage your phone system from any device. Apps are available for download that expand your ability to collaborate with others using RingCentral applications.

- You can download apps by clicking on this page. You can also download apps from the RingCentral website, see Downloads.

33. Click **Finish**.

Continue to the following page.



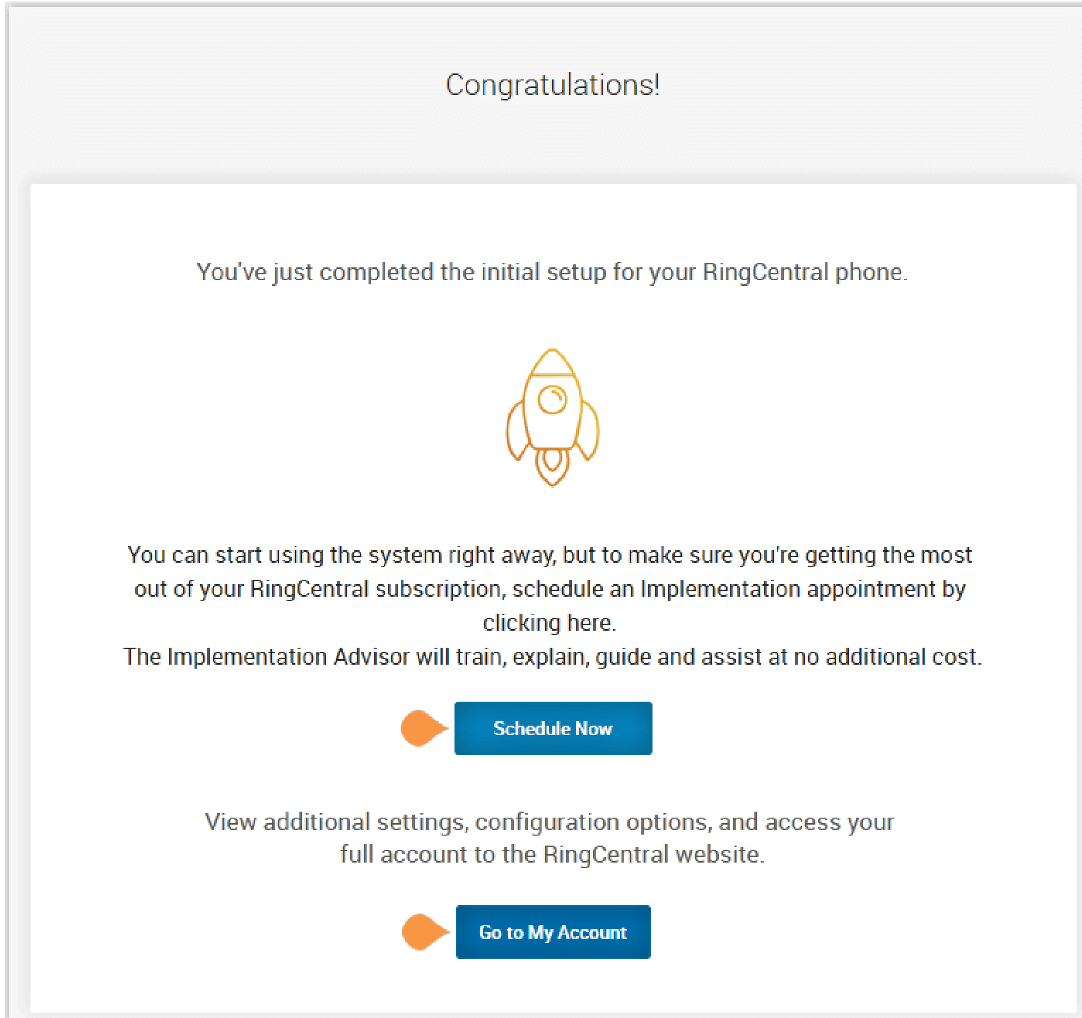
Congratulations!

You have completed the initial setup of your RingCentral business phone system.

- If desired, click **Schedule Now** to schedule an appointment with an implementation advisor who will assist you in setting up your RingCentral phone system.
- Otherwise, click **Go to My Account** to access your account and view additional settings.

34. Click **Go to My Account**.

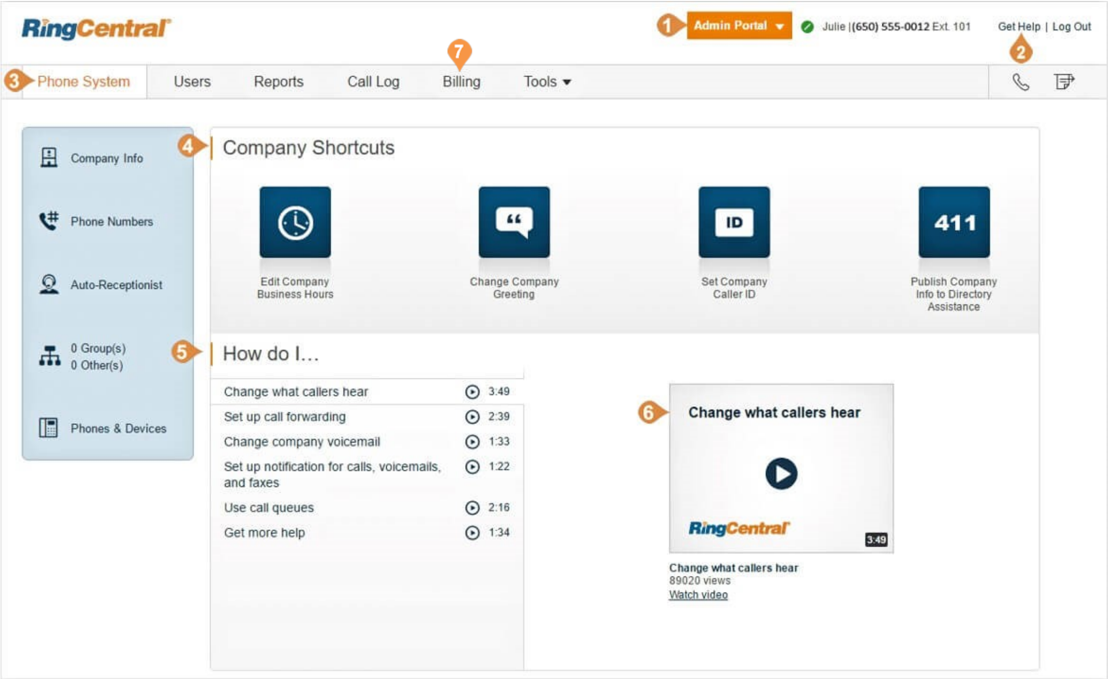
In the following pages, you'll log in to your RingCentral account.



The Admin Portal

Your RingCentral Office Admin Portal opens. Take a tour of your Admin Portal page:

1. The **Admin Portal** button lets you toggle between the admin interface or the user interface, **My Extension**.
2. **Get Help** lets you find answers to most of your questions or request Support.
3. Menu tabs lead you to a tab-specific menu on the left. Each tab has a different menu list. For example, the menu list for **Phone System** tab is **Company Info, Phone Numbers, Auto-Receptionist, Groups-Others,** and **Phones and Devices.**
4. **Company Shortcuts** provide buttons to frequently accessed settings.
5. **How do I** ... lists available admin-specific videos.
6. A featured video.
7. Check the **Billing** tab for questions relating to your account.



To Find Information About

- Support **Videos**, click here.

Knowledgebase Articles

For further instructions on these subjects:

- Sign in
- Changing your password
- Call Handling
- Emergency Calling - Registered Location
- Voicemail Greetings

Continue to the following page.

While You are Using RingCentral Products

We’re happy you have selected RingCentral for your business communication needs. RingCentral provides a variety of ways for you to learn more about our service.

Attend a Training Webinar

Designed for both administrators and users, these sessions will give you the best practices, power-user tips, how to instructions and other valuable information on your RingCentral system View our upcoming scheduled Customer Training Webinars.

Post in the RingCentral Community

Share your ideas and feedback, get your problems solved, and give back by helping others! See RingCentral Community.

Download Applications

Wherever you go, RingCentral follows. Download our applications for your computer and smartphone to receive business calls on your mobile phone. Download Now.

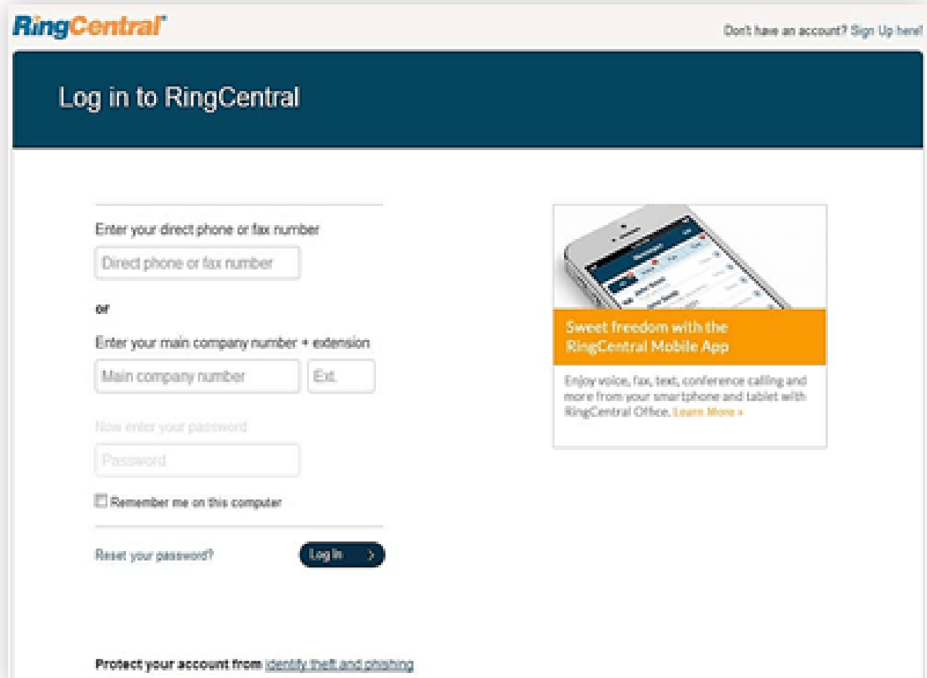
Appendix B: Bulk Purchase and Upload

Introduction

RingCentral streamlines large-customer on-boarding with bulk purchase, upload, and activation for up to 1,000 users at a time.

Let's say a customer is expanding sales offices in multiple cities and wants to add hundreds of users and purchase hundreds of phones for them.

The customer Administrator begins by logging into their RingCentral Web account.

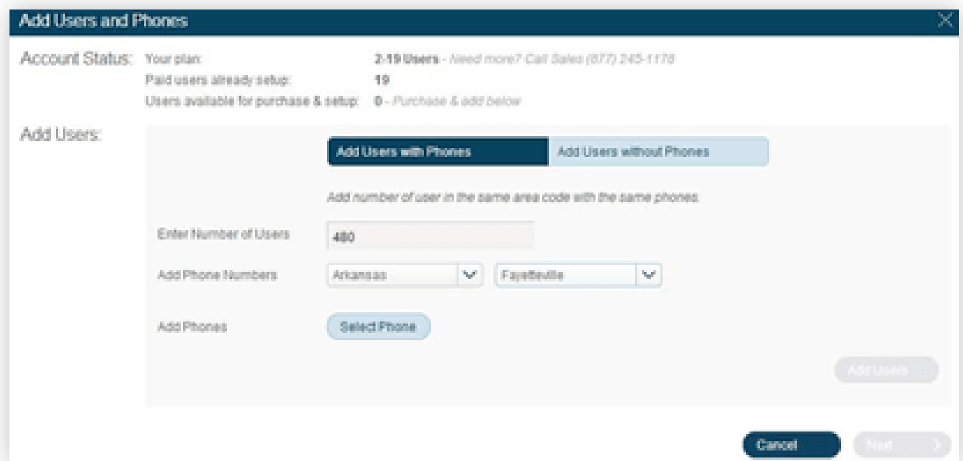


Bulk Purchase of Users

Go to **Settings** > **Phone System**. Select **Users**, then select **Add Users**. The Account Status at the top of the panel shows your current Plan.

- Click the button **Add Users with Phones** (or **Add Users without phones**). First enter the number of users who will be in a specific area code and assigned a specific model of phone.
- Click **Select State/Province** and then the Area Code or City for the phone numbers for these users.
- Click **Select Phone**. Review the phone devices listed, scrolling down to see all devices.
- Click **Select** next to the phone type to be purchased for these users. Then, click **Add Users** to add them to the Your Selection list at the bottom of the page, which shows your order.

continued on the next page...



Repeat this process to add users in a different area code, or to add users with a different phone model: enter the number of users, select the state and area code or city, then select a model of telephone. Click **Add Users** each time.

As you build your order, your Selection shows the details at the bottom of the screen.

- Now click the button **Add Users without Phones**.
- Select a location (State/Province and Area Code/ City).

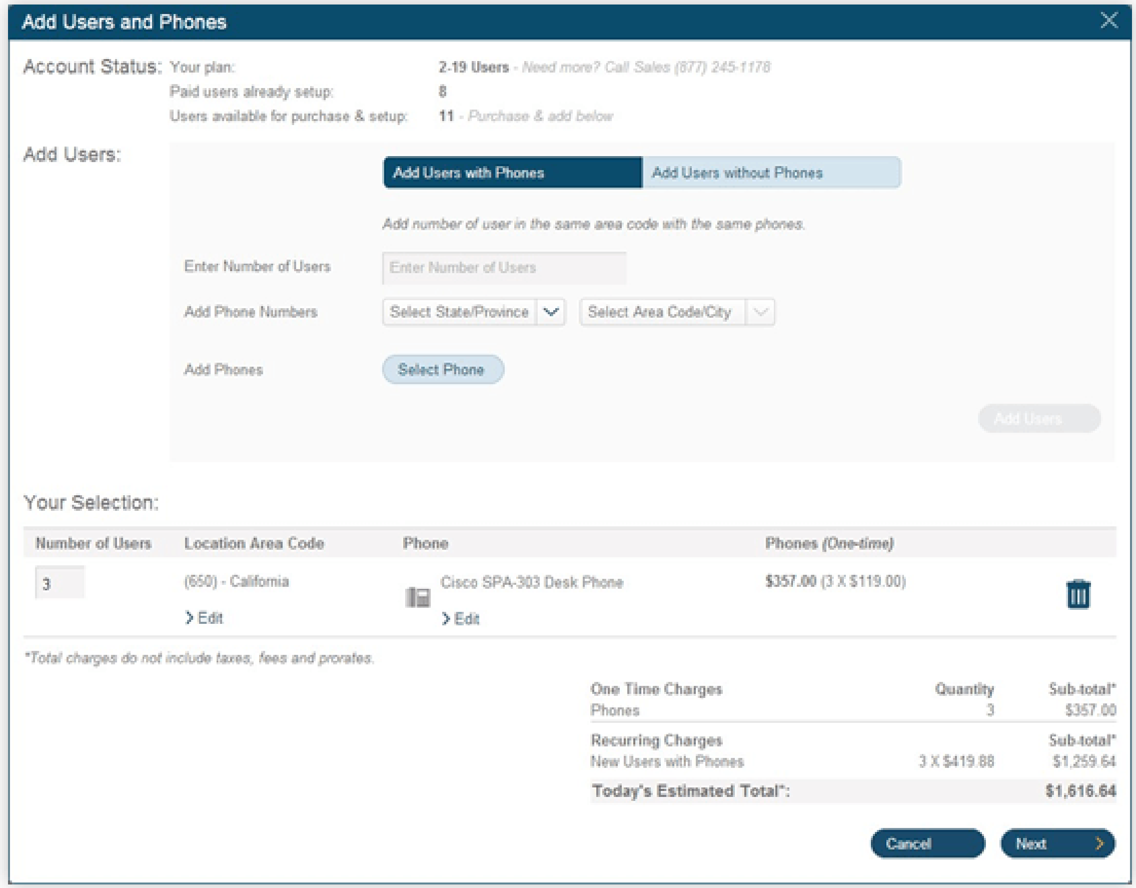
Repeat this process until all the users, with or without phones, in various area codes, and assigned various phones, have been ordered.

- Review the order in the Your Selection list for accuracy.

Your Selection also shows the running total of recurring or monthly charges for users and one-time charges for phone devices.

- When ready, click **Next**. (If the city or area code you selected for a group of users doesn't have enough phone numbers available for this order, you will get a pop-up error message at this point.
- Click **Edit** to select another city or area code.)

Contact your sales representative if you're having trouble.



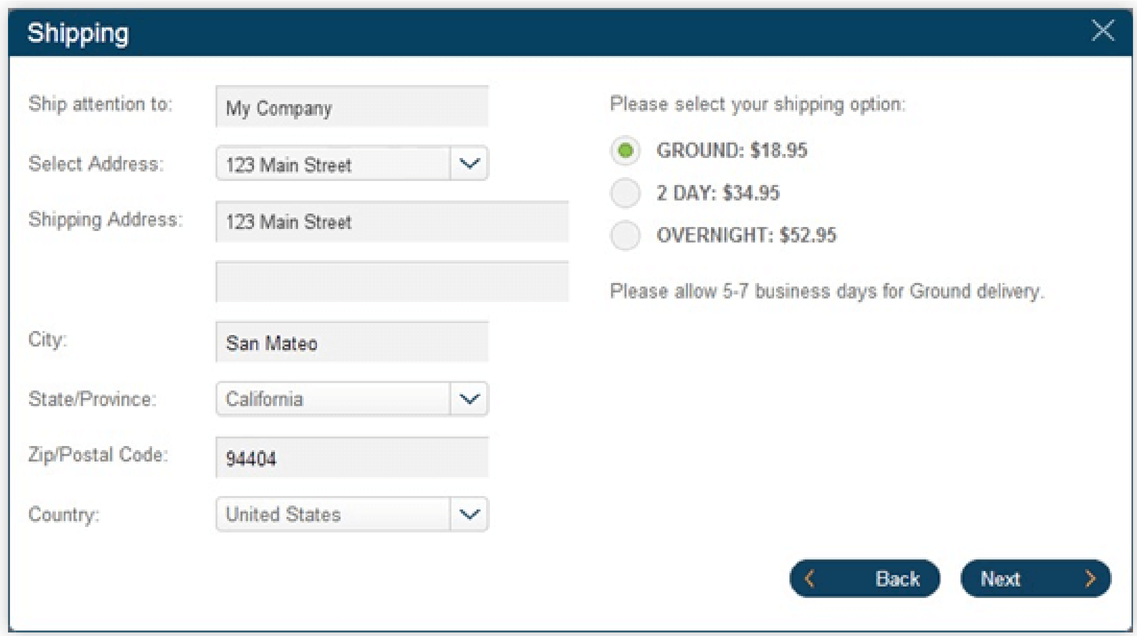
On the Shipping page, check and, if necessary, update the account information displayed, including the shipping address if you ordered phones, and choose a shipping method.

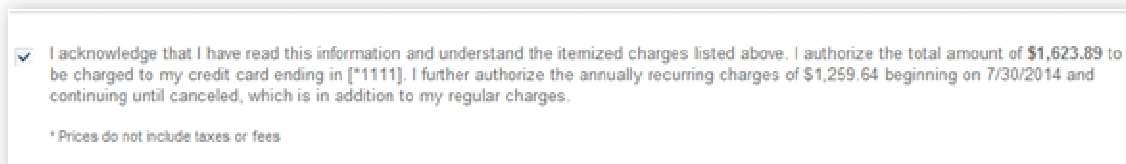
For Ground delivery, please allow five to seven days.

Note: Each order can be delivered to only one address. To deliver phones to several addresses, enter separate orders for each address.

- Click **Next**. On the Review and Submit screen you can review your total phone order and all costs including Taxes, Charges and Fees, and Shipping.
- Click the Back arrow if you want to revise your order. If satisfied, click the Acknowledgment box at the bottom of the page, and then click **Next**.

An email confirmation of your order will be sent to the email address for your account.





Bulk Upload of Users

A customer who wishes to activate a large number of purchased users at once should contact their Sales Agent for assistance.

Rather than entering users' information one user at a time, the Sales Agent will use a template file to upload and activate up to a thousand users at a time.

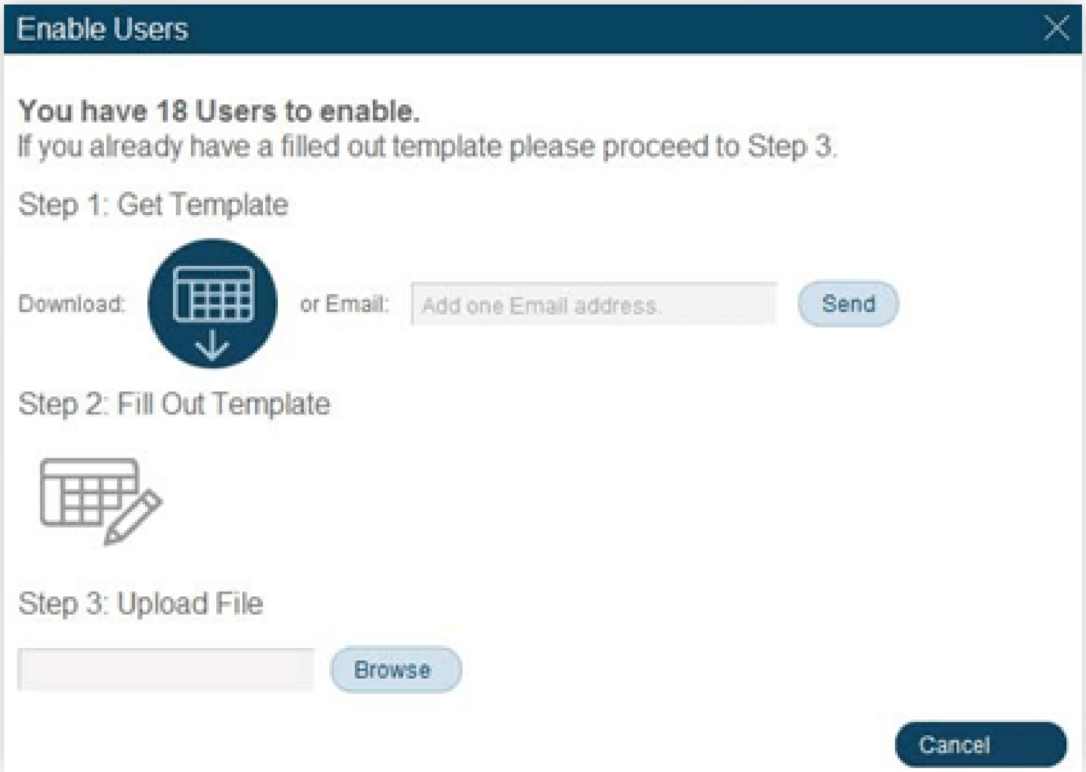
The Sales Agent accesses the customer account through the sales administrative screen, and can review the account with the customer.

The agent's template file will contain all the Unassigned User phone numbers and extensions currently in the customer account.

The customer must provide the data on the users to assign to each number or extension: user name and email address, and for users who will be assigned direct lines, emergency location information such as street address.

The Sales Agent can assist the customer in providing the correct data.

The customer can send this data to the Sales Agent to be transferred into the template and make necessary edits. Or the Sales Agent can email the template to the customer to be filled out and returned. The template contains instructions for proper use.



Activation of Users

The Sales Agent checks the finished template to ensure that the customer's users are assigned to the area codes and Direct Lines or Extensions desired by the customer. The Sales Agent will also ensure that users with direct lines provide the required E911 address information.

Once the template is completed and checked, it is uploaded into the system for processing. The system generates a preview, with problem areas highlighted on the screen in red, and an Errors column spelling out the problem with any field that needs to be corrected.

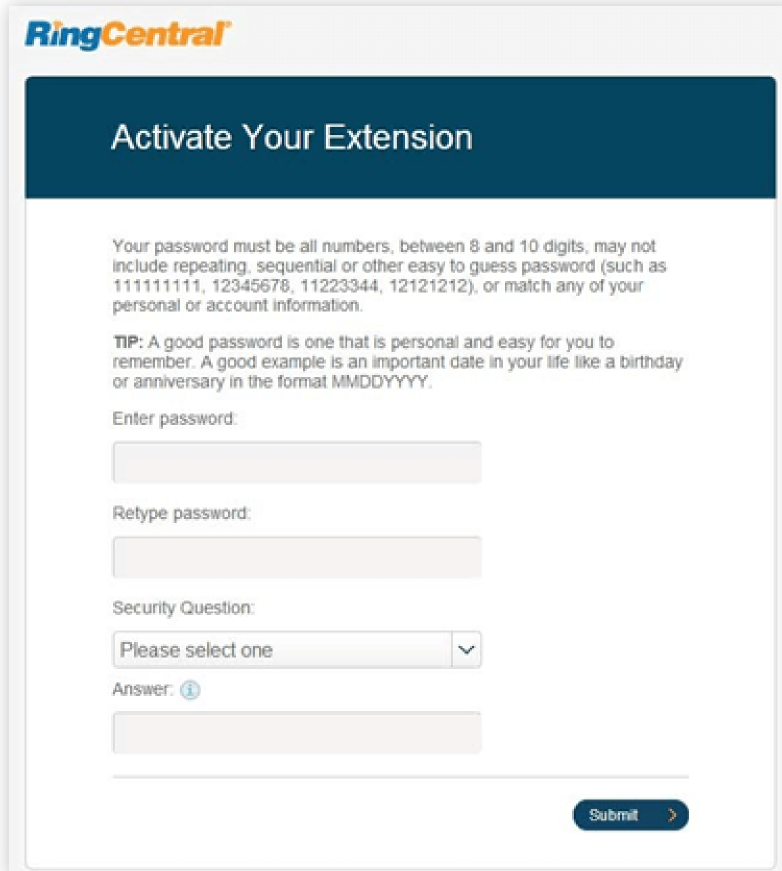
Common errors include:

- Missing required information
- Bad email addresses (usually typos)
- Using a postbox address where a street address is required Duplicate extensions.

The customer or the Agent downloads the file, corrects the problems, and re-uploads the file. (Don't edit out the Errors columns; that is handled automatically.)

Once the template has been processed and checked, and found to be correct, the Activation process begins.

The Sales Agent will enter one or more email addresses that will be notified when the processing is done.

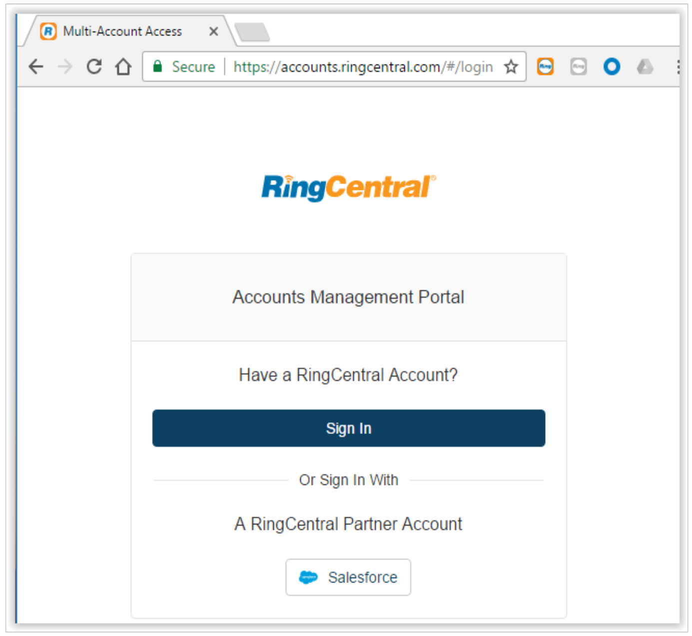


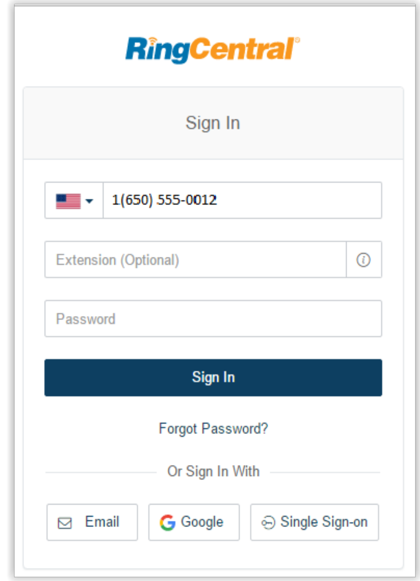
Appendix C: Multi-Account Access

Account Management Portal

The Multi-Account Access feature increases the efficiency of multiple account management for those administrators who manage multiple accounts, or who support multiple clients. From the management portal, you can easily switch from one account to another. The portal provides a consolidated view of all accounts, while they remain separate entities. The Multi-Account Access feature:

- Centralizes access for customers with multiple RingCentral accounts
- Allows them to link all of their accounts in the Accounts Management portal.
- Allows company admins to access their RingCentral accounts from a single log in.
- Allows administrators to view services for all accounts from a single location.





To access the management portal:

1. Go to accounts.ringcentral.com.
2. Select **Sign In** to use RingCentral credentials.
3. Enter your credentials for an account using one of the available options.
   If configured, you can enter an email address or Google account email address as your user ID. See Use a Corporate Email Address to Log In and Use a Google Account to Log In.
4. Click **Log In**.

Or, to access the portal using Salesforce:

1. Click **Salesforce Account**.
2. Enter your Salesforce credentials.
3. Click **Log In**.

Manage Linked Accounts

You can manage any number of accounts from the account management portal. Each page in the portal can display up to 20 linked accounts, and different pages are identified by page numbers.

To add accounts to the portal:

1. Click **Link Account**.
2. Enter credentials of the account.
3. Click **Log In**.
4. Repeat for each account to add.

To unlink an account:

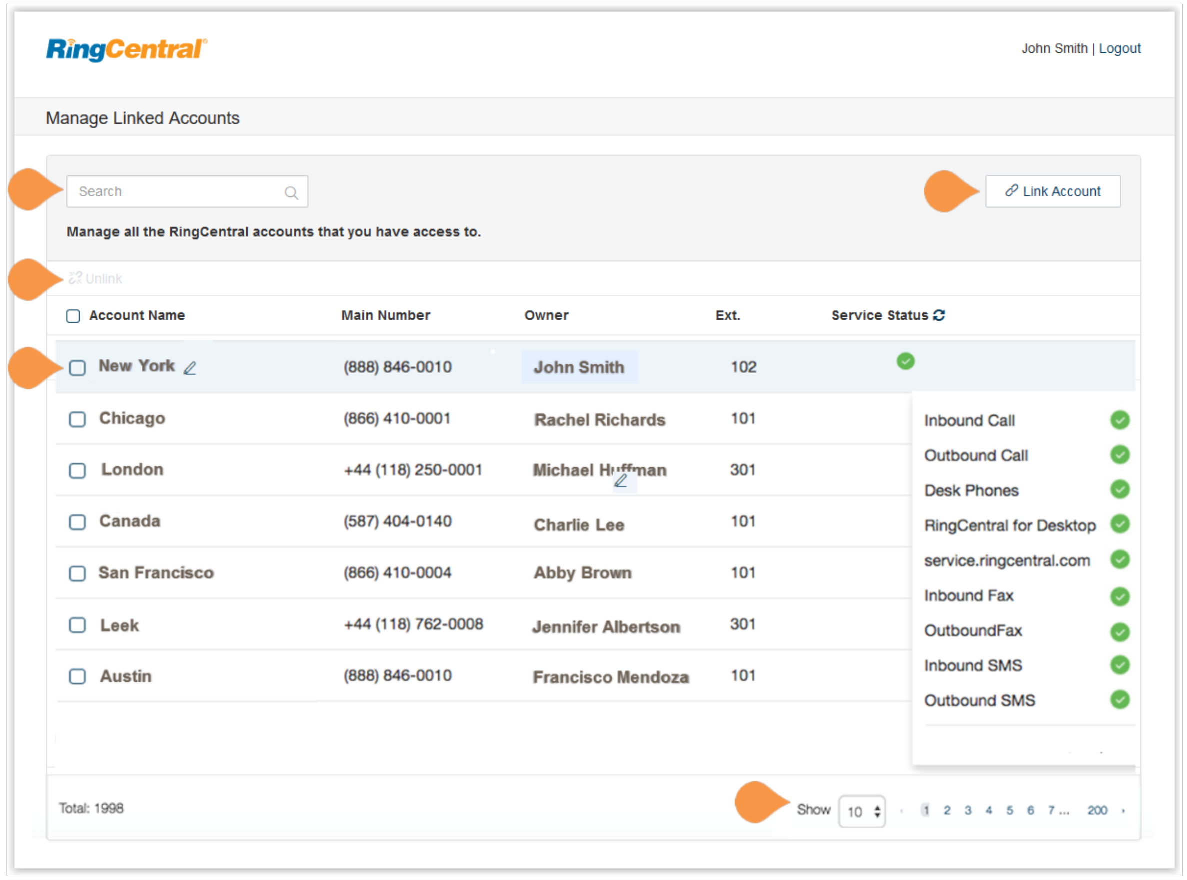
1. Select one or more account(s).
2. Click **Unlink selected account**.
3. The account is removed from the view.

To edit the account name with descriptive text:

1. Click the **Edit** icon beside the account.
2. Enter the new **Account Name**.
3. Press **Enter**.

To search for an account, enter text in the search field.

To scroll between pages, click controls at bottom right.



Access Accounts

The account management portal allows you easily launch the **Admin Portal** for any of your accounts, avoiding the complexity of logging in to multiple accounts.

To trigger a login to an account:

1. Click **Open** beside the account.
2. A new browser tab is launched and you are automatically logged into the **Admin Portal** for the account.

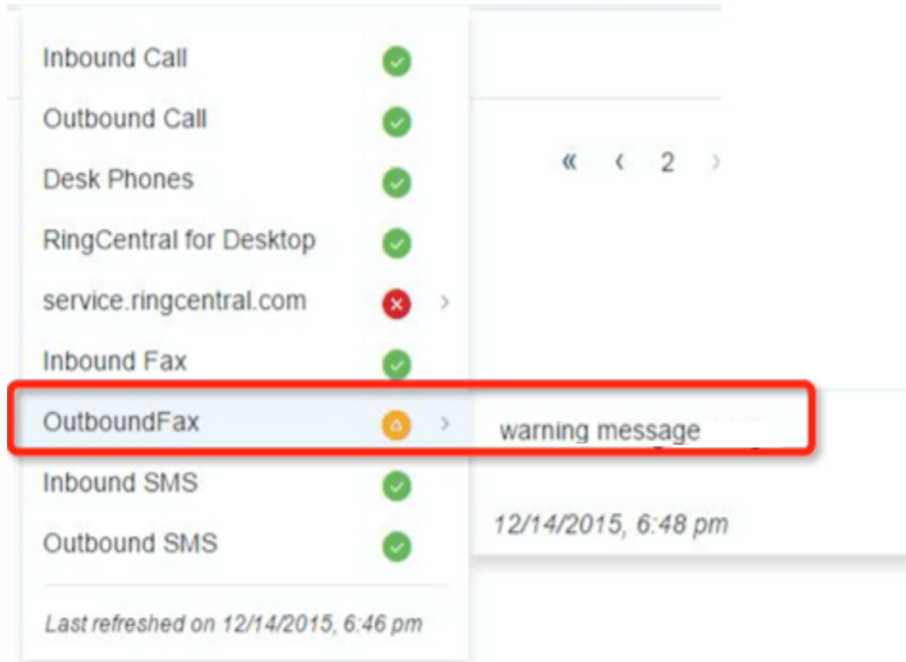
Manage your account as normal.

View Service Status

The account management tool reports status for the following services:

- Inbound Calls
- Outbound Calls
- Desk Phones
- RingCentral Phone
- service.ringcentral.com
- Inbound Fax
- Outbound Fax
- Inbound SMS
- Outbound SMS

Service status is refreshed automatically every three minutes. Service status details and the date of the last refresh are displayed when you hover. To manually refresh the service status, select the **Refresh** icon:



An abnormal service status results in the display of an error reason when you hover on the status. The following statuses are reported:

Green: The service is available.

Yellow: There is an error related to the service.

Red: The service is unavailable.

Grey: Service status has not been reported.