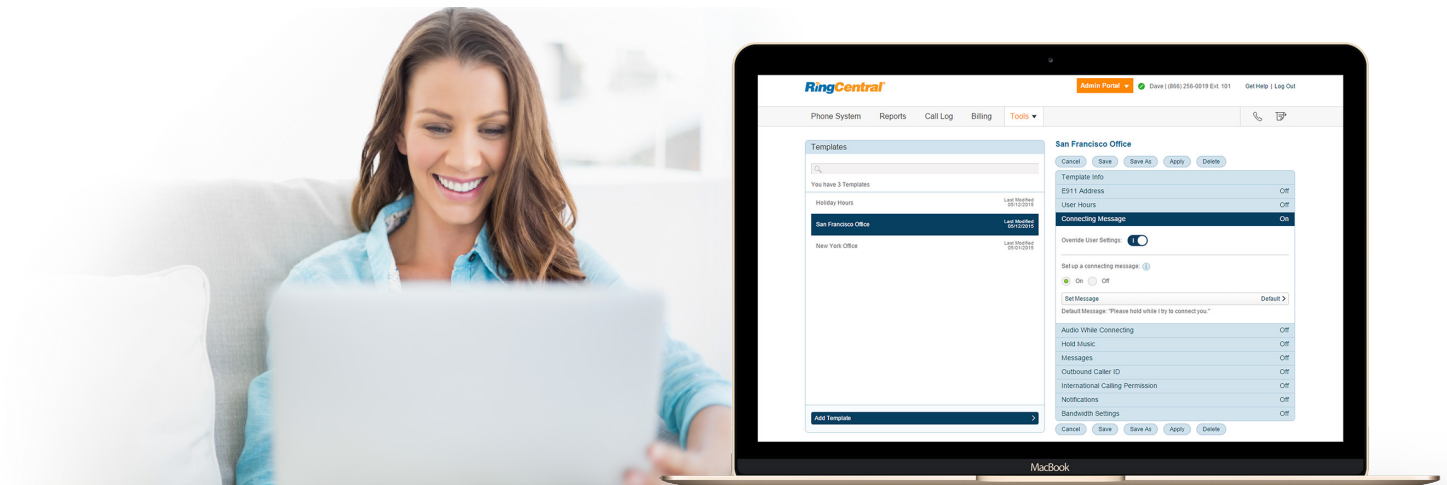


RingCentral Templates



RingCentral Templates will save you time and repetitive manual effort to streamline your administrative routine. RingCentral Templates let you specify phone system user settings just once, then apply those settings over and over again just by associating users with the template.

RingCentral provides **two types of templates**—one that lets you define user settings and another that lets you set up specific call handling rules, perhaps for special events.

For example, let's say you're opening a branch office in New York and hiring many people there. You can create a template for the New York Branch, and set the time zone, office hours, and other details specific to the New York location. Then apply that template to every user in the New York office. And when new hires come aboard, it's just a few clicks to associate them with the same template. You'll never again have to manually set up users individually, tediously repeating the same configuration for each person.

Now let's say your Chicago retail stores are planning a special campaign for Labor Day. You can create a call handling template to specify promotional greetings and special store hours, valid for the campaign period. Then apply the template once to all the Chicago retail stores, and immediately, every call to the Chicago stores experiences special call handling for the promotional period.

Benefits

Increase IT productivity

- Set phone system configurations once and apply them to whole groups of users.

Simplify user maintenance

- Have a new hire or a promotion? Add or remove a user from any template at any time.

Easily respond to changes

- Just edit or add a setting and quickly deploy the template again.

*Templates are available for all Office Editions with 2 or more digital lines.

Personalize each customer experience

- Apply event-driven or location-specific call handling rules with no manual effort.

Reduce inconsistencies and anomalies

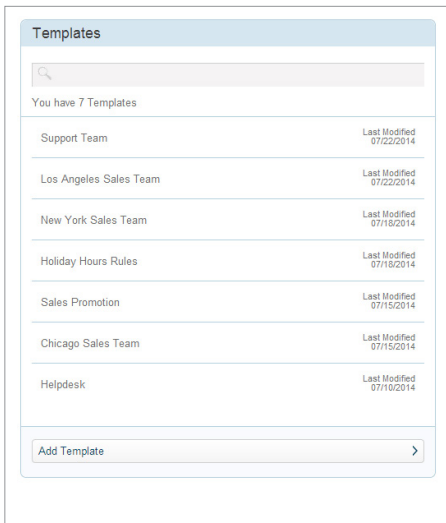
- Ensure standardized user settings or call handling rules are consistently applied to all users.

Templates are free and available now

- Included in all RingCentral Office Editions.*

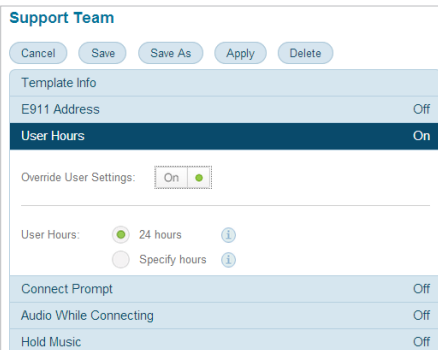
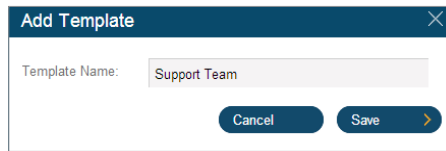
How it Works

To create Templates for user settings



1. Go to Templates

Log in to your RingCentral online account, and find **Templates** under the **Tools** menu. You'll see your list of existing templates (it's blank until you create your first one).
Tip: Easily clone a template by clicking **Save As** and giving it a different name. Now you can use it as base for a new template with similar settings.



2. Create a Template

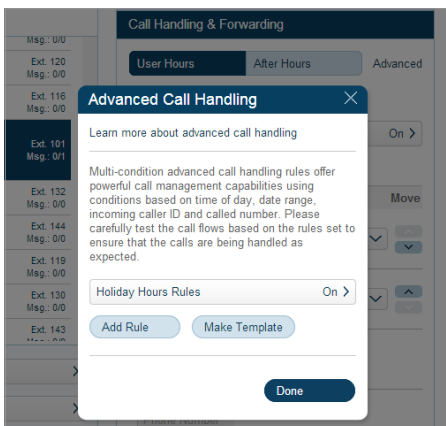
Add and name your new template. Then select the settings you want to use. Remember to save your work!
Tip: Turn on **Override User Settings** every time to make sure your template settings replace any old settings.



3. Apply a Template

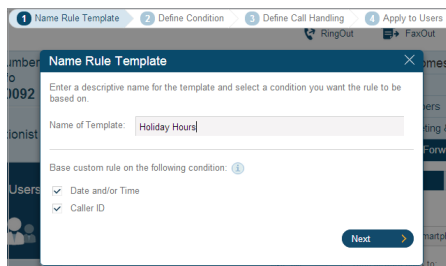
In the Templates list, choose the template you want and click **Apply**. Now select all the users who will use the template.

To create Templates for call handling rules



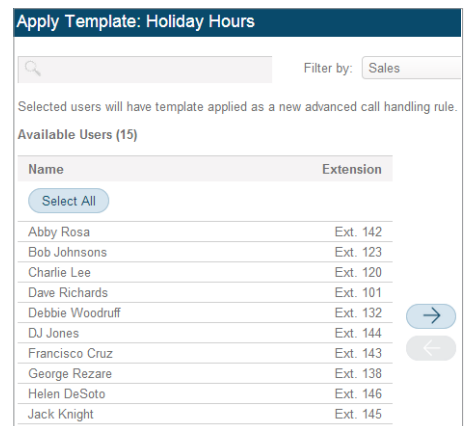
1. Go to Templates

In your RingCentral online account, decide who will use the call handling template and select one user as a starting point.
 Go to **Call Handling & Forwarding**. Click **Advanced**. Then click **Make Template**.



2. Create a Template

Name the rules template. Then go through the rules wizard to specify the call handling conditions you want.



3. Apply a Template

On the **Apply Template** screen, select the additional users who will also use this template to handle their incoming calls.