RingCentral

THE WORKING FROM HOME TOOLKIT

Essential tools to enable an agile workforce

Video meetings

Video conferences, screensharing and webinars

Mobile and desktop app

Simple and intuitive on your preferred devices

Team collaboration

All work conversations and shared files in one platform

Call forwarding

Divert calls to reach you at any place and time

Presence and head-up display

Simple and intuitive on your preferred devices

Admin control

Instant employee moves, adds and changes from a web interface

Call monitoring

Managers can listen into calls, provide coaching and facilitate discussion

Call recording

A record of conversations to play back and download anytime

ringcentral.co.uk/remote

TABLE OF CONTENTS

ADMIN CONTROL

LOG IN TO YOUR ACCOUNT

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

Admin portal header menu:

- Phone system
- Users
- Reports
- Call log
- Billing
- Tools

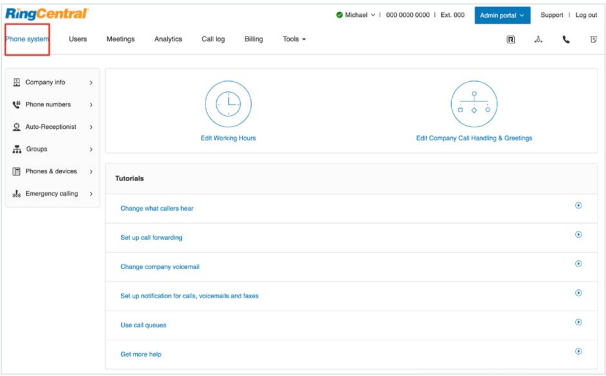
Phone system includes all of the main settings for the entire phone system: Company info, Phone number, Auto-Receptionist, Groups, and Phones & devices.

Users allows you to view and manage users and edit user permissions.

Reports provides usage analysis and trending metrics.

Call log and **Billing** display information about your phone system.

Tools has more setup options such as Account Validation and IVR.



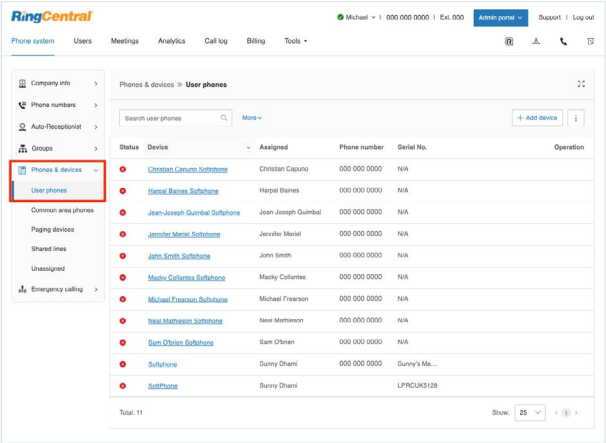
First go to **Phone system** to set up your **Company info**, including your caller ID name.

You can maintain your phone number with your current provider and forward calls automatically to your RingCentral account.

1. In the **Admin portal**, click **Phone system**, then click **Phone numbers** in the sidebar menu.
2. Under the **Assigned** tab, click **Forward number**.
3. Enter an existing phone number and click **Next**.
4. Select **Auto-Receptionist** or **Select extension** and click **Next**.
5. Review the information about ordering busy call handling and no-answer call handling from your local telephone company and local telephone company changes, then click **Done**.

MANAGE YOUR EMERGENCY ADDRESS

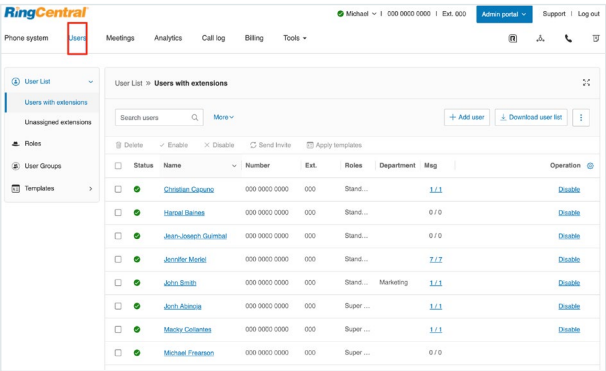
The emergency address is the address sent to Emergency Services teams when an emergency number is dialled. You must provide an accurate address so teams can respond in an emergency. If you physically move your phone to a new address, you must update the emergency information immediately.



Manage your emergency address

1. Log in to your RingCentral online account.
2. Users can click **Settings** > **Phones & Numbers**. If you logged in using an administrator account, click **Admin portal** > **Phone system** > **Phones & devices** > **User phones**.
3. Then, click on a user and scroll down to Emergency address.
4. Click the button to **Edit address**. Edit the address, accept the terms, then click **Save** to confirm the changes.

ADD AND MANAGE NEW USERS IN MINUTES



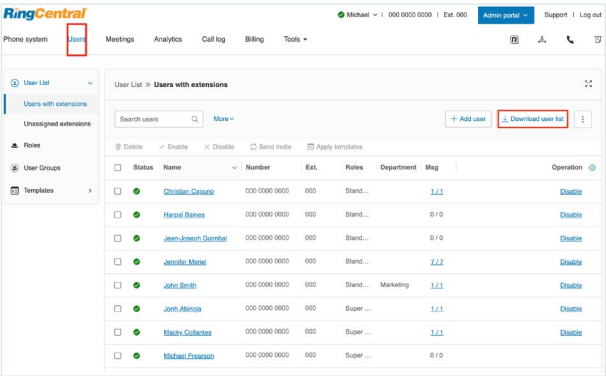
Add users with phone devices

1. In the **Admin portal**, click the **Users** tab, then click **+Add user**.
2. A pop-up window will appear with steps for adding the extension.
3. Select **Domestic** or **International** as the location for your new user. To add an international phone number, select a country from the drop-down menu, then click **Next**.
4. Under **Add users with phones**, choose the number of users, the phone numbers, and the phones you want to add.
5. Follow the prompts for your shipping address and billing information, then review and submit your order.

Add users without phones

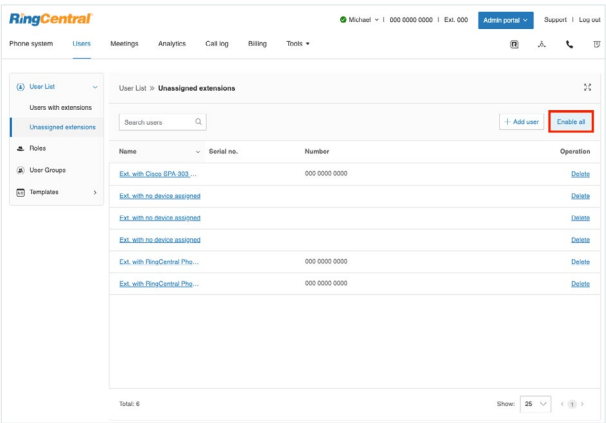
1. In the **Admin portal**, click the **Users** tab, then click **+Add user**.
2. A pop-up window will appear with steps for adding the extension.
3. Select **Domestic** or **International** as the location for your new user. To add an international phone number, select a country from the drop-down menu, then click **Next**.
4. Under **Add users without phones** choose the number of users and the phone numbers you want to add.
5. Follow the prompts for your shipping address and billing information, then review and submit your order.

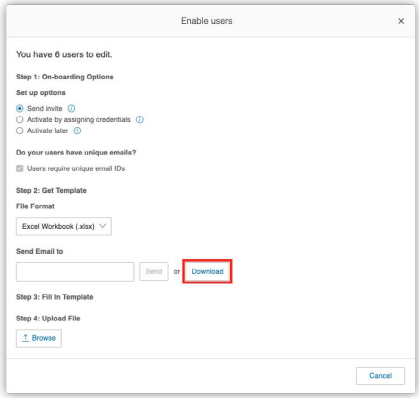
MANAGE USERS AND EXTENSIONS



Bulk edit user information

1. In the **Admin portal**, click the **Users** tab, then click **Download user list**. This exports a template MS Excel file you can use as a source file.
2. Complete the fields in the source file for each user, then re-upload.



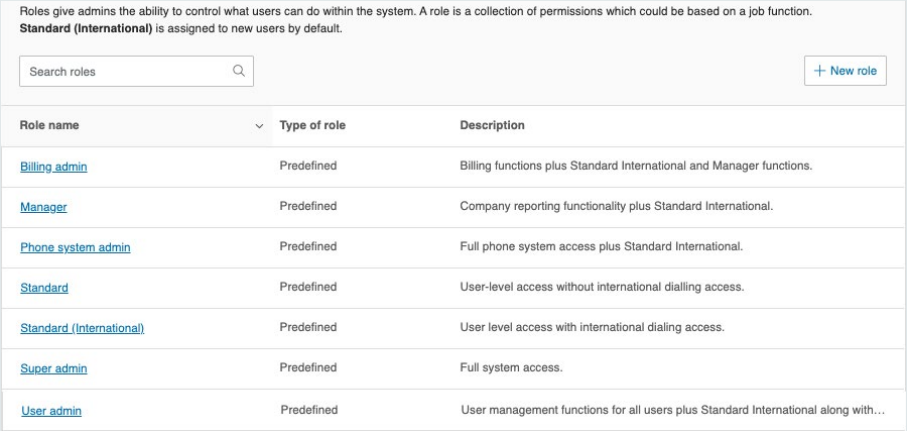


Assign extensions to users

1. In the **Admin portal**, click the **Users** tab > **User List** > **Unassigned extensions**.
2. Click **Enable all**.
3. In the pop-up box, click **Download** to get the template source file.
4. Once you've prepared the source file with the required information, click **Browse** to re-upload.

Assign and manage user roles and permissions

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



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.
Standard (International) is assigned to new users by default.

Search roles

+ New role

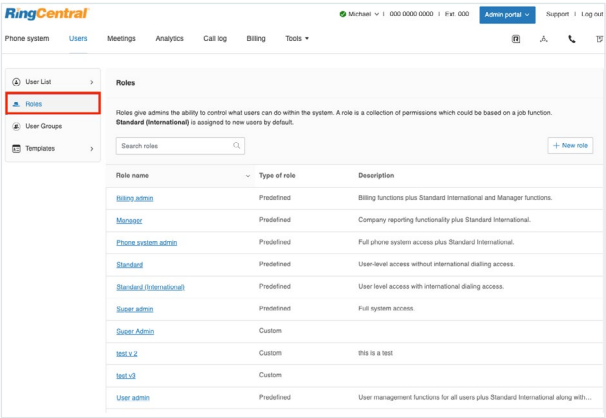
Role name	Type of role	Description
Billing admin	Predefined	Billing functions plus Standard International and Manager functions.
Manager	Predefined	Company reporting functionality plus Standard International.
Phone system admin	Predefined	Full phone system access plus Standard International.
Standard	Predefined	User-level access without international dialling access.
Standard (International)	Predefined	User level access with international dialing access.
Super admin	Predefined	Full system access.
User admin	Predefined	User management functions for all users plus Standard International along with…

Manage permissions in multi-site accounts

You can prepare 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.

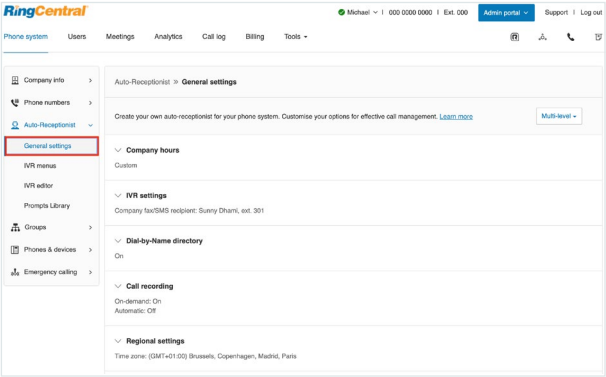
Example: If a user is assigned with a role of “user admin” with a role scope of Manchester and Bristol sites, the user can only perform user administrative actions for those two sites and all the assets within those sites.



Assign users to a role

1. In the **Admin portal**, click the **Users** tab, then click **Roles**.
2. Select one of the roles to assign users.
3. Click the **Assigned 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. Select the users to assign to the role and click **Assign**. The users’ roles are assigned and displayed in the User List.

SET COMPANY BUSINESS HOURS

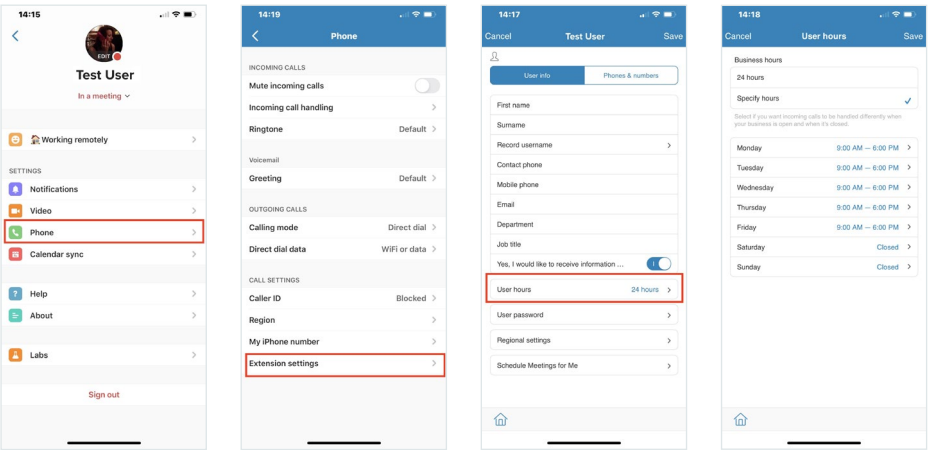


You can specify the opening and closing time for each day of the week or select 24 hours. This establishes the settings for the **Business hours** and **After hours** tabs in other settings areas (such as call queue settings and user settings).

1. In the **Admin portal**, click the **Phone system** tab, then click **Auto-Receptionist** in the sidebar menu.
2. Click **Company hours**.
3. Set your Company hours to:
   a. 24 hours to have incoming calls handled the same way all the time.
   b. Custom hours, which 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**.
4. 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**.

Set personal office hours as an admin

1. In the **Admin portal**, click the **Users** tab, then click to select a user.
2. Click on **User details** to view and edit the user's information, including assigned role, extension, name, recording, phone numbers, email address, department, hours, password, and regional settings.



Set personal office hours as a user

1. In the RingCentral iPhone app, tap your profile avatar, then tap **Phone**.
2. Next, tap **Extension settings**, then tap **User hours**.
3. Set your business hours.

CALL HANDLING RULES

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.

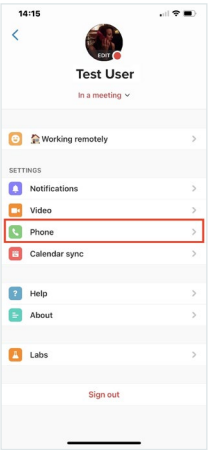
Set call handling as an admin

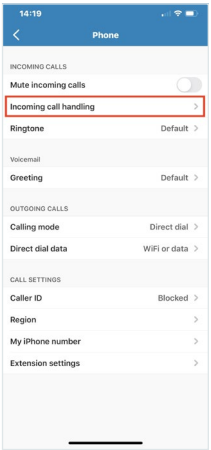
1. In the **Admin portal**, click the **Phone System** tab, then click **Auto-Receptionist** in the sidebar menu.
2. Click **IVR menus** and select one of them. The **IVR details** popup will appear.
3. Click **Call handling**, then **Add key**. The **Key press assignment** pop-up will appear.
4. Set the **Key press**, then select a **Connect to** action:
   - Transfer to voicemail of
   - Connect to dial-by-name directory
   - External transfer

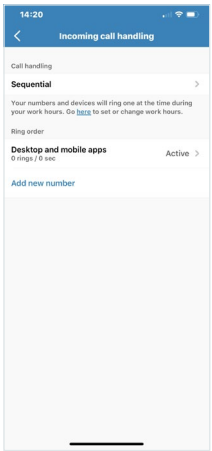
5. Then select to whom the setting will apply:
   - All
   - IVR menus
   - Users
   - Groups
   - Others

6. Select **Users**, then click **Save**.

You can also use the **Visual IVR editor** to configure call handling settings.

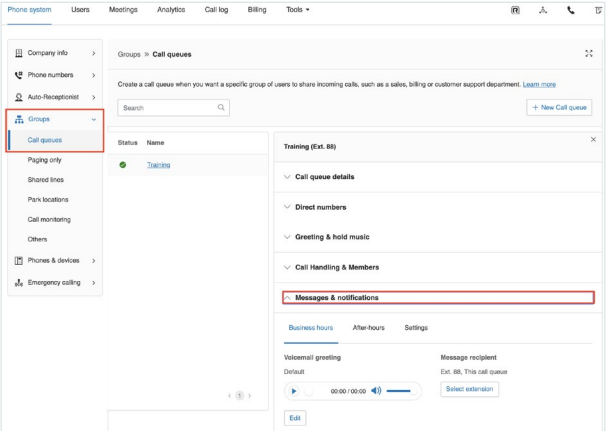






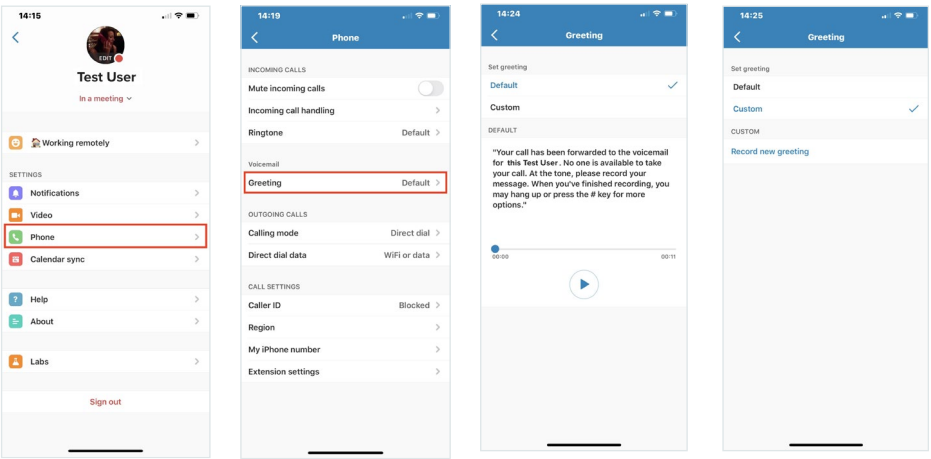
Set incoming call handling as a user

1. In the RingCentral iPhone app, tap your profile avatar, then tap **Phone**.
2. Tap **Incoming call handling**, then use the options to set how the app handles your incoming calls.



Set a voicemail greeting as an admin

1. In the **Admin portal**, click the **Phone System** tab, then click **Groups** in the sidebar menu.
2. Click the **Call queues** tab and select a **Call queue**.
3. Click **Messages & notifications**, then **Voicemail greeting**.
4. 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**.
5. Click **Save**.

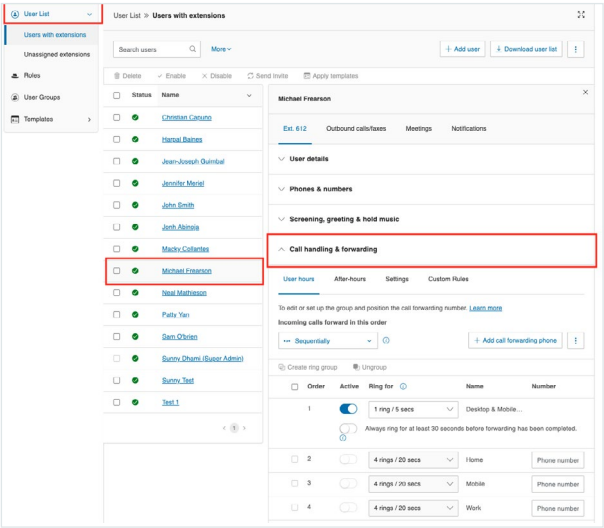


Set a voicemail greeting as a user

1. In the RingCentral iPhone app, tap your profile avatar, then tap **Phone**.
2. Tap **Greeting** then tap **Custom** then **Record new greeting** to record a custom greeting.

CALL HANDLING AND FORWARDING

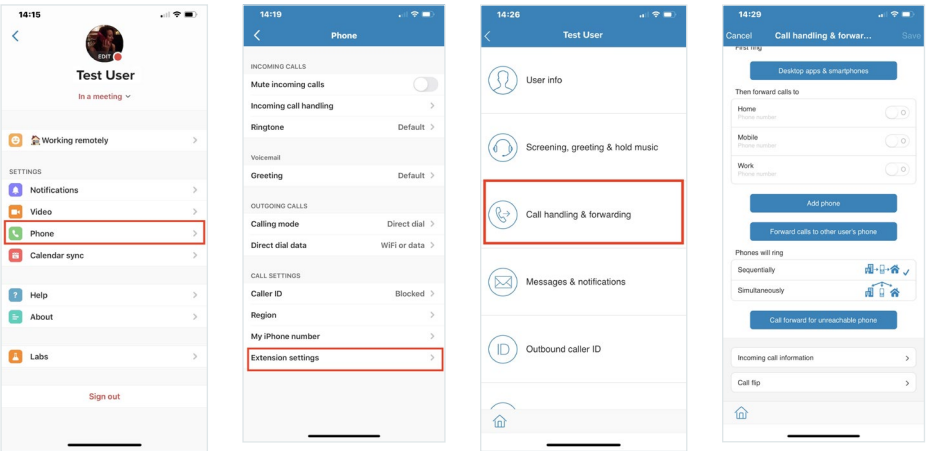
Divert calls to reach you wherever you are by forwarding them to your mobile app. Alternatively, route calls to a colleague when you're not available.



Set up call forwarding as an admin

1. In the **Admin portal**, click the **Users** tab, then select a user by clicking on their name.
2. Click the **Call handling & forwarding** drop-down menu. This is where you can view and edit selected users' call handling, call forwarding, ring group, additional phones, ring pattern, incoming call, and call flip settings.

Callers will first hear the company or individual's greeting and then the RingCentral Auto-Receptionist will ask callers to hold while the call is connected.



Set up call forwarding as a user

1. In the RingCentral iPhone app, tap your profile avatar, then tap **Phone**, then **Extension settings**.
2. Tap **Call handling & forwarding**, then use the options to set up your customised call forwarding mechanism.

There are many other call handling features, such as call park, merge calls, call flip, call hold, RingOut®, and others listed online.

USING THE RINGCENTRAL MOBILE AND DESKTOP APP

The RingCentral app is a multifunctional interface that allows you to send team messages, conduct video conferences, and make phone calls. As a user, you can start a voice call or a video chat from the Message pane or from the dedicated Phone and Video panes.

Message

- Collaborate through team messaging, file sharing, task management, shared calendars and more.

Video

- Join online meetings with screen sharing, advanced collaboration, webinar capabilities and more.
- Switch between tools with options to send text messages. Shift to use text or video chat.
- Integrate with Office 365 or Google Calendar and start, schedule, or join meetings from the app.

Phone

- Use enterprise-grade VoIP for voice calls.

Integrate

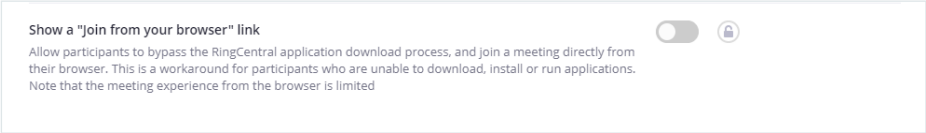
- Combine your existing business applications, such as CRM and project management tools, with the RingCentral app.

USING APP AND BROWSER

It's possible to join a meeting from the app or the web browser.

Enable 'join from browser'

1. Log in to the RingCentral admin portal.
2. Administrators go to **Meetings**, then **Meetings Settings**.
3. Scroll down to **In Meeting (Advanced)** and toggle the switch to enable **Show a "join from your browser" link** feature.



RingCentral has a Chrome extension

Make RingCentral calls directly from Gmail, Google Calendar, or your Chrome browser. RingCentral for Google Chrome extension is available to all RingCentral Office® customers.

Use the RingCentral dial pad to manually dial a number or click any phone number in your contacts, emails, G Suite applications, and Chrome browser. RingCentral RingOut will connect the call.

Schedule online meetings and audio conferences, and they'll appear on your Google Calendar.

Create Hangouts with up to 1,000 audio participants without leaving the Chrome browser.

To use Google Login, your Google email must be associated with your RingCentral account.

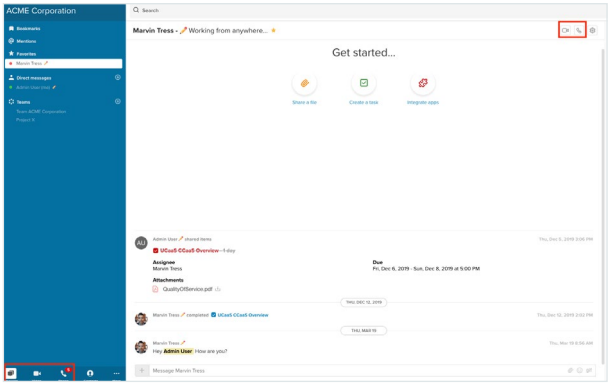
VIDEO MEETINGS

Once you've signed in to the RingCentral app, you can start a meeting from the Message pane or from the Video pane.

START A VIDEO CALL FROM CHAT

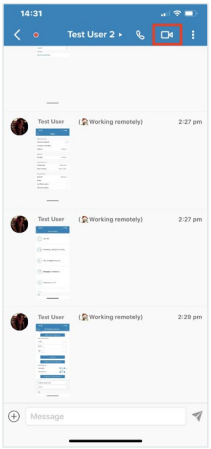
The quickest way to start a video call is to do so instantly from a chat.

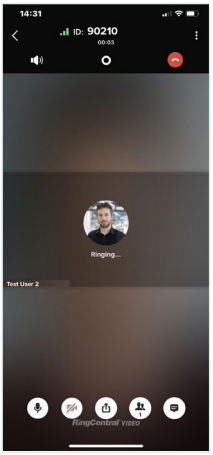
Otherwise, for scheduling, you can start a video call from the Video pane.



Desktop

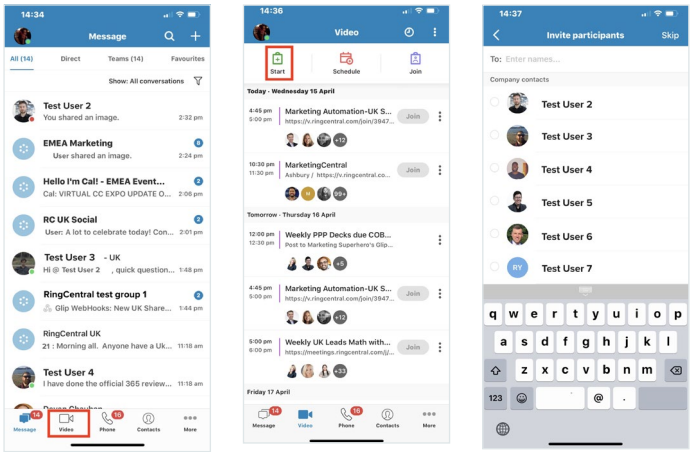
In the Message pane, function icons are at the top-right of the conversation interface. Click the telephone icon for a voice call, the video icon for a video call, or the cog (desktop) or vertical dots (mobile) to change the conversation settings. Clicking the video icon immediately starts a video call.





iPhone

From the chat pane, tap the video icon in the top right. This will immediately begin a video call.



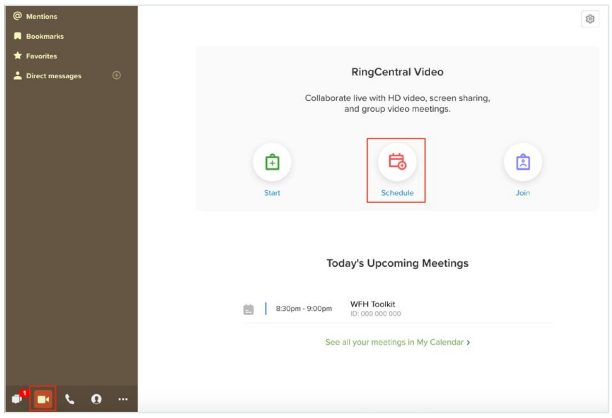
From the **Video** pane, you can also tap **Start** to start your own meeting or **Schedule** to schedule an upcoming meeting or **Join** to join an existing meeting.

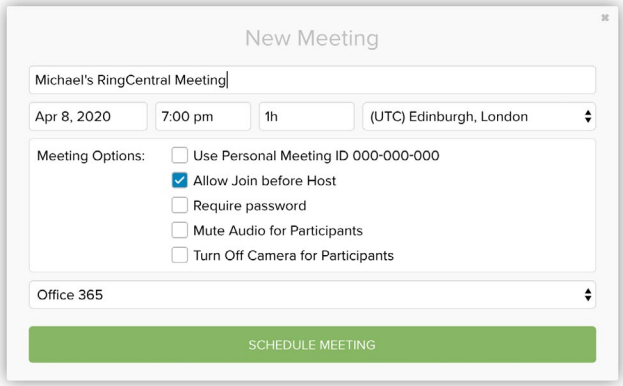
1. From the default screen, tap the video icon. This will show you a list of all your upcoming video meetings.
2. Tap **Start** to start a new video meeting. This will open up a list of your contacts to invite.
3. Once you've selected all the participants, tap **Meet now** to begin the meeting.

SCHEDULE A MEETING

You can do this via the RingCentral app on your desktop, laptop, or mobile device. When you schedule a meeting, you are automatically the host of that meeting.

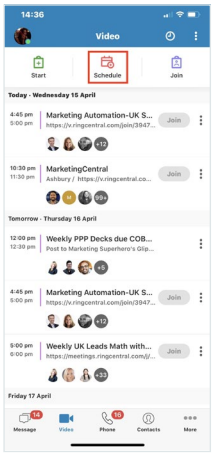
You can choose to schedule a meeting directly to your Office 365 or Google calendar if you have it connected to the RingCentral app.

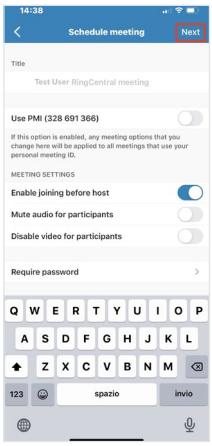


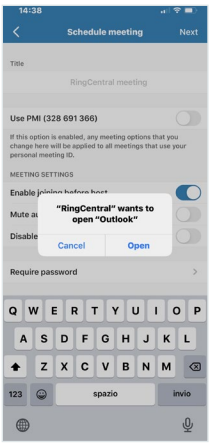


Desktop

1. Click **Schedule**. Enter the meeting topic, date, time, duration and time zone.
2. Use the checkboxes to **Use personal meeting ID**, **Allow join before host**, **Require password**, **Mute audio for participants**, and **Turn off camera for participants**.
3. Use the drop-down menu to choose whether to schedule the meeting in your **Office 365** or **Google calendar**.





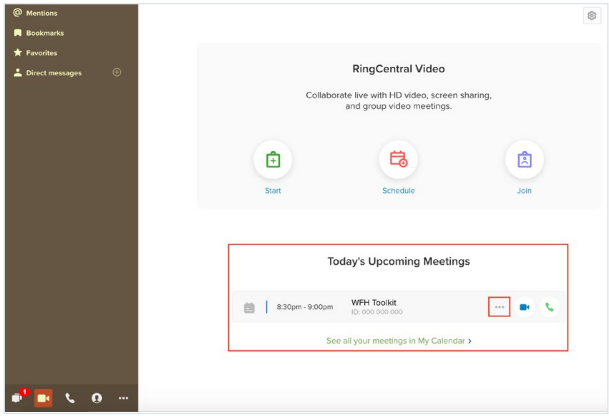


iPhone

1. From the default screen, tap the video icon, then tap **Schedule**.
2. Enter the details of the meeting you want to schedule and tap **Next**.
3. This opens a popup to schedule the meeting in your connected calendar and send an invitation to participants via your calendar.

INVITE PARTICIPANTS

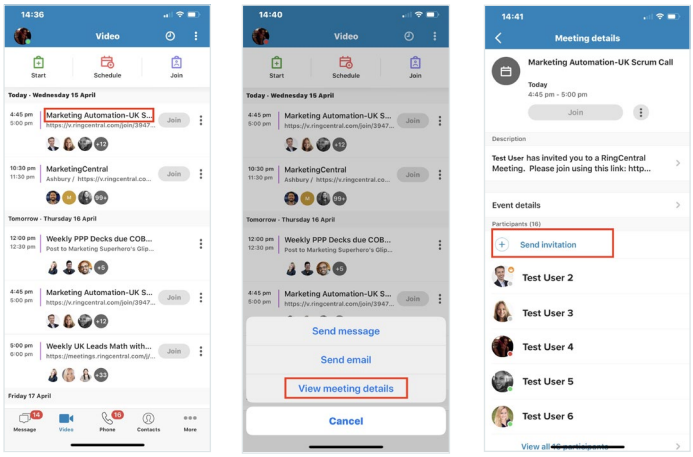
You can send participants a calendar event, email, or direct link. You can invite participants to a scheduled meeting or directly from an active meeting.



Desktop

If you have your Office 365 or Google calendar connected to the RingCentral app, you can easily invite participants to a meeting you scheduled without leaving the app.

To invite participants to a meeting, you can either copy the meeting info and share with them directly in a chat message or choose **View Meeting Details**, which automatically opens an Outlook web page where you can update your meeting participants.



iPhone

If you have your Office 365 or Google calendar connected to the RingCentral app, you can easily invite participants to a meeting you scheduled without leaving the app. Once you've connected your calendar, upcoming meetings are populated automatically from the Video pane.

1. From the default screen, tap the video icon. This will show you a list of all your upcoming video meetings.
2. Tap the meeting title to open a menu of options. Tap **View meeting details** to open the meeting details.
3. Tap **Send invitation** to invite others to the meeting, and choose the application you want to use to send the invitation.
4. Once you choose an application, the meeting invitation will be populated into the text field of that application. You can also choose **Copy URL** to copy the meeting URL and paste it into any text field.

There are many ways to join an existing meeting. You can join a meeting with or without signing in from your calendar if you have scheduled the meeting, or directly from an invitation.

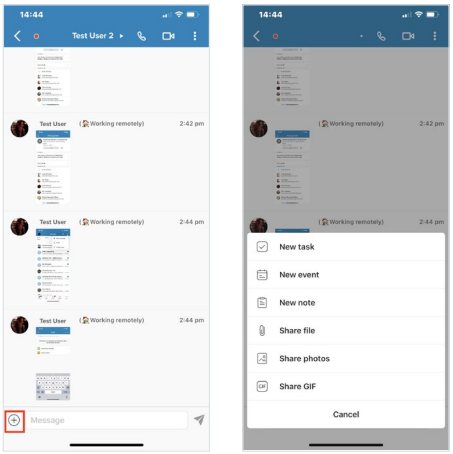
Advice on how to host and control a meeting is available in the RingCentral Knowledge Base.

TEAM COLLABORATION

Send messages: You can send messages to individuals or to a group of people. To start, tap the + icon and click **New message** to send a new message to a coworker of your choice by typing their name. You can also send a group message to multiple people or start a team to collaborate on projects.

Start a team: From the default pane, tap the + icon then tap **Create team**. Type the team name and start adding participants.

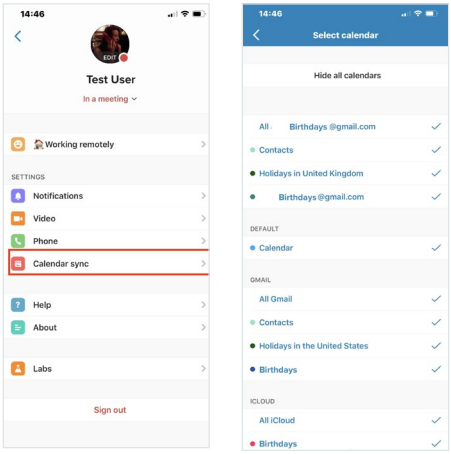
Share files: In the text input field of the Message pane, click the paperclip icon (desktop) or the + icon (mobile) to open a menu of options. On desktop, you'll see a list of file sources for sharing. On mobile, you'll see a list of functions including **Share file** or **Share photos**.



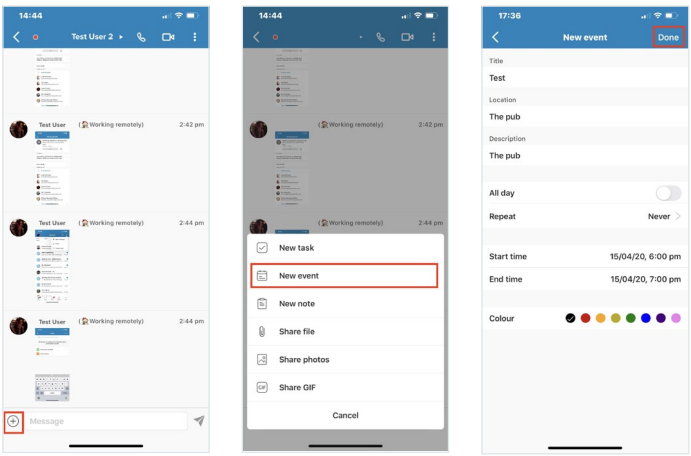
Create tasks: In an individual message, click (or tap) the + icon to open a menu of options. Click (or tap) on **New Task** and use the input fields to add details. When you're finished, click **Post Task** (desktop) or tap the tick icon in the top right of the screen (mobile).

Create and share notes: In the text input field, click (or tap) the + icon to open a menu of options. Click (or tap) on **New Note** and just start writing your note. When you're done, click **Post note** (desktop) or tap the tick icon in the top right of the screen (mobile).

Access the calendar: The calendar summarises all of your events across all of your RingCentral app conversations. On desktop, click the horizontal dots in the sidebar menu, then click **Calendar** to integrate your existing calendar with the app. In the iPhone app, tap your profile avatar, then tap **Calendar sync**. From here, choose which calendars you want to sync.

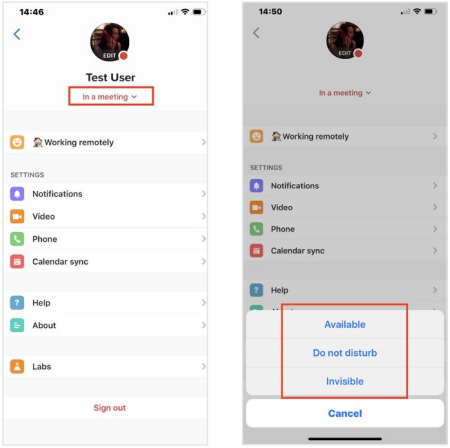


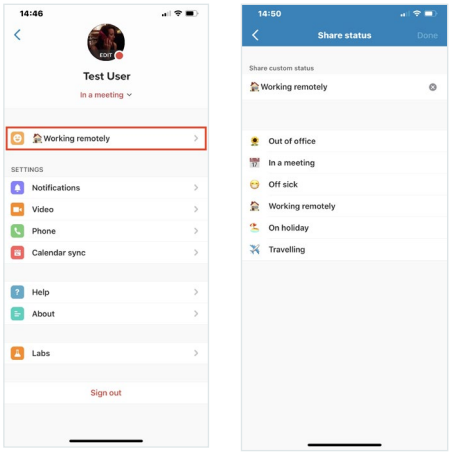
Create events in teams: In the team chat's text input field, click (or tap) the + icon to open a menu of options. Click (or tap) on **New event** and use the input fields to add details. When you're finished, click **Post task** (desktop) or tap **Done** in the top right of the screen (iPhone).



Set presence and status: On desktop, click your own avatar in the top right of the window. This opens up options for you to set presence and status. Hover over your current presence to see options for updating. Write your own status in the text input field or choose one of the pre-written options.

On iPhone, tap your profile avatar then tap your current presence to see options for updating. To change your status, tap your current status to enter the status menu. Write your own status in the text input field or choose one of the pre-written options.





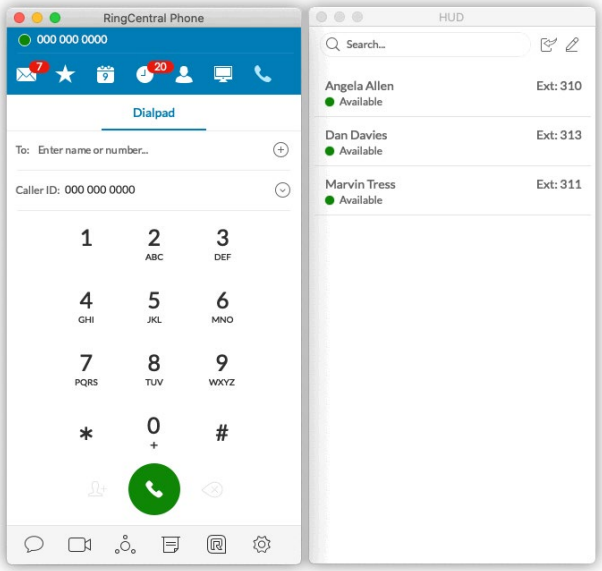
CALL MONITORING

The head-up display (HUD) is for advanced users and is accessible through RingCentral's separate desktop phone app, which you can download.

View colleagues' real-time availability and manage multiple incoming calls with the capability to answer and transfer an incoming call, add users to a current call, chat with a colleague directly, or pick up a call on behalf of colleagues.

This is especially useful in customer contact situations, in which a supervisor can support an agent while a customer call is in progress, join a customer call, or take over a call that is in progress.

Enable head-up display



1. Click **Settings** or the gear icon.
2. Click **Calls** on the left side menu, and then on the right side, look for **HUD** under **General**.
3. Under **HUD**, you will see **Turn on HUD to keep track of your favourites**. Click the slider button next to it to enable **HUD**. You can also enable **Ring when any user I am monitoring receives an incoming**. When this option is enabled, your RingCentral Phone™ app will also ring when any user you are monitoring gets a call. You can also pick up their call if you have permission. For more information, go to Allow presence monitoring on a user extension.
4. To set up HUD, click the **HUD** icon, then click **Create** to manage user extensions in the HUD list.
5. Select the contact(s) from the list and click **Add**, then click **Save**.

More HUD features.

Monitor calls using HUD

When an agent or user is on a call, the admin or supervisor can hover over the user and click **Monitor**.

When a user is being monitored, the following actions are available:

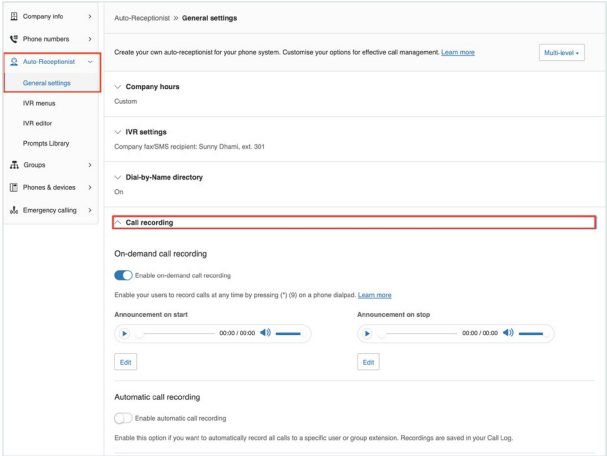
Whisper
This option allows the supervisor to speak with the user without interfering with the caller.

Barge
This option allows the supervisor to join the call.

Takeover
This option allows the supervisor to take the call and proceed without the user who answered the call.

CALL RECORDING

As a user, you can use call recording functionality across all endpoints. RingCentral supports local and cloud recording options, which are both accessible in your account.



On-demand call recording

1. Log in as the Administrator to the RingCentral online account.
2. In the **Admin Portal**, click **Phone system**, then click **Auto-Receptionist** in the sidebar menu.
3. Under **General settings**, click **Call recording** to open the menu.
4. Click the toggle button to enable or disable **On-demand call recording**.
5. Click **Save**.

Automatic call recording

1. Log in as the Administrator to the RingCentral online account.
2. In the Admin Portal, click **Phone system**, then click **Auto-Receptionist** in the sidebar menu.
3. Under **General settings**, click **Call recording** to open the menu.
4. Click the toggle button to enable or disable **Automatic call recording**.
5. Click **Save**.

This guide provides instructions for iPhone mobile experience.

If you're using Android, please refer to the RingCentral app for Android pages online.

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