

# RingCentral Office® UK

## Admin Guide



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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 247](#) 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

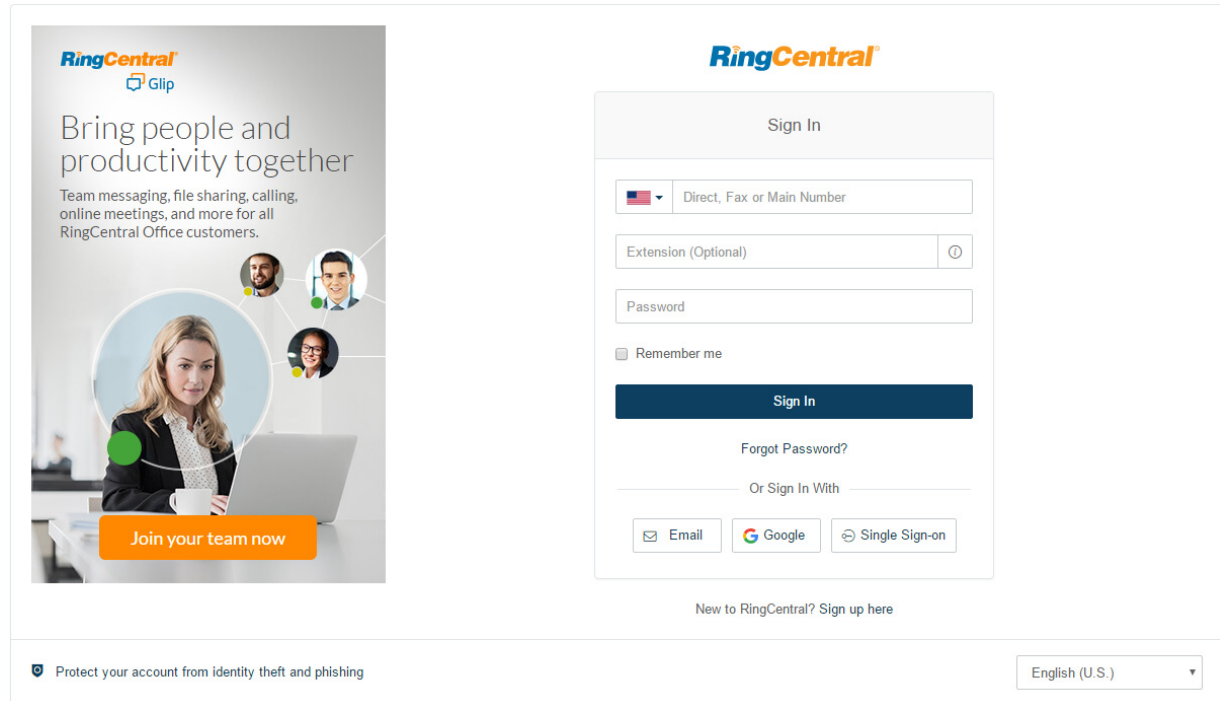
You may optionally configure users to log in with a unique corporate email address or Google (Gmail or G Suite) account. See [Use a Corporate Email Address to Log In](#) and [Use a Google Account to Log In](#).

### 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 unrecognised computer.



The image shows the RingCentral login page. On the left is a promotional banner with the RingCentral and Glip logos, the text "Bring people and productivity together", and a list of features: "Team messaging, file sharing, calling, online meetings, and more for all RingCentral Office customers." Below this is a photo of a woman working on a laptop with a "Join your team now" button. On the right is the "Sign In" form. It includes a country dropdown (USA), a field for "Direct, Fax or Main Number", an optional "Extension" field, a "Password" field, and a "Remember me" checkbox. A "Sign In" button is below these fields. There are links for "Forgot Password?" and "Or Sign In With". At the bottom of the sign-in section are three buttons: "Email", "Google", and "Single Sign-on". At the very bottom of the page is a security notice: "Protect your account from identity theft and phishing" and a language dropdown set to "English (U.S.)".

**RingCentral**  
Glip

Bring people and productivity together

Team messaging, file sharing, calling, online meetings, and more for all RingCentral Office customers.

Join your team now

**RingCentral**

Sign In

Direct, Fax or Main Number

Extension (Optional)

Password

☐ Remember me

Sign In

Forgot Password?

Or Sign In With

Email Google Single Sign-on

New to RingCentral? Sign up here

Protect your account from identity theft and phishing

English (U.S.)

## 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.

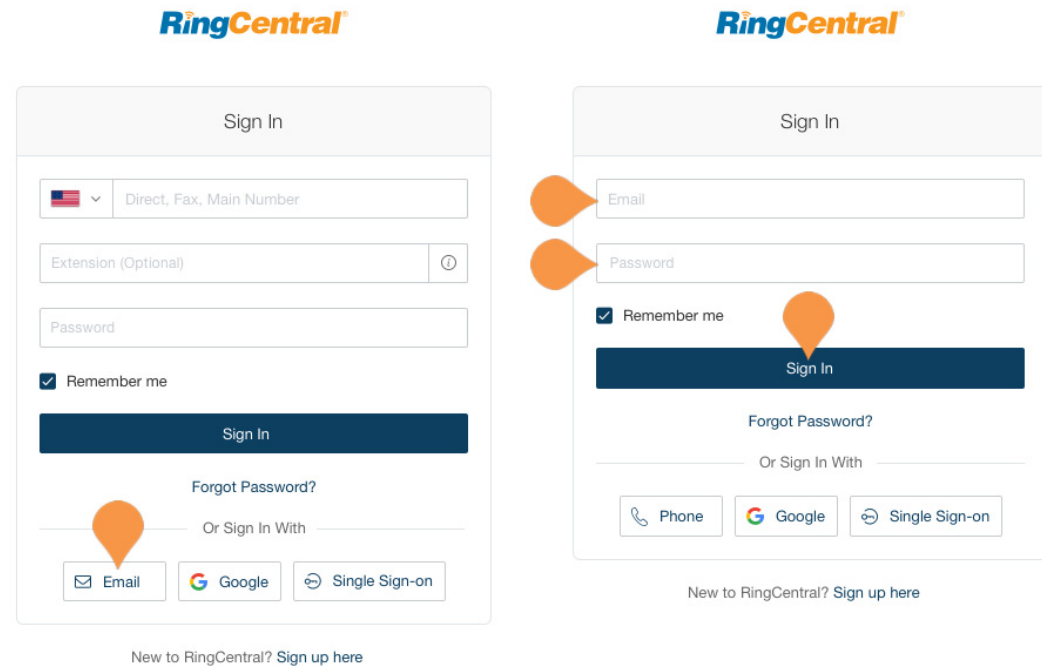
For information on automatically provisioning users from your corporate directory, see [Directory Integration](#).

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**.



Sign In

Direct, Fax, Main Number

Extension (Optional)

Password

☒ Remember me

Sign In

Forgot Password?

Or Sign In With

Email Google Single Sign-on

New to RingCentral? Sign up here

## 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.

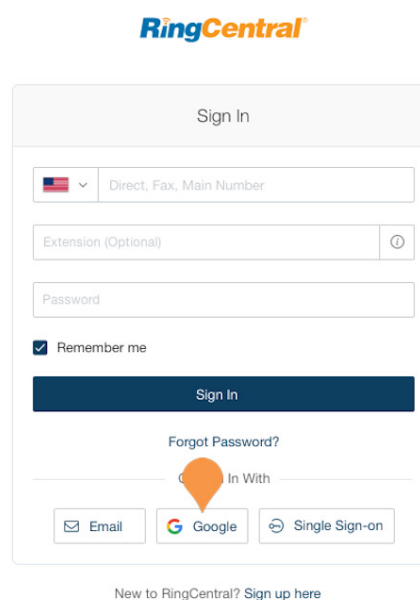
This feature applies to accessing your RingCentral online account, endpoint such as RingCentral Phone, RingCentral Meetings, RingCentral Glip, integration plug-ins for Chrome, and the Multiple Account Access portal. You can configure Google Email addresses during the Express Setup of your RingCentral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

If not already configured, set a Google email address.

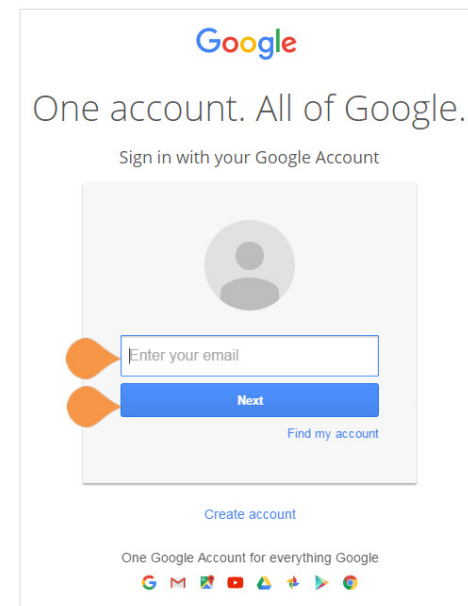
1. Log in using your RingCentral credentials.
2. Select **Users**.
3. Select a user. The user settings page is displayed.
4. In the **Email** field, specify a unique email address.
5. Click **Verify email uniqueness**; resolve duplicates.
6. Click **Save** and log out.

To Log In using Google:

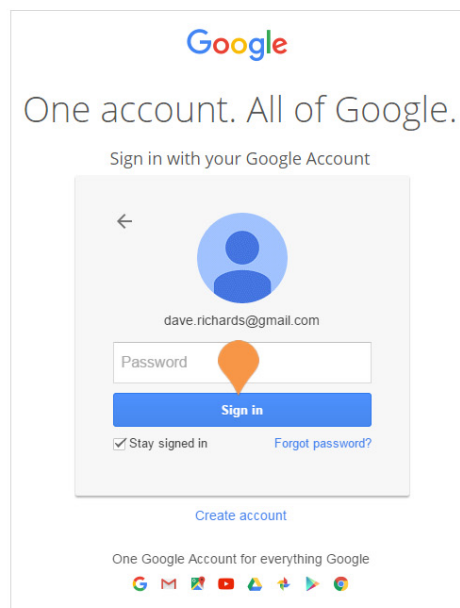
1. In the login screen, click **Google**.
2. Enter your unique Gmail **Email** address and **Password**.
3. Edit any duplicate email addresses.
4. Click **Allow** to allow the application access.



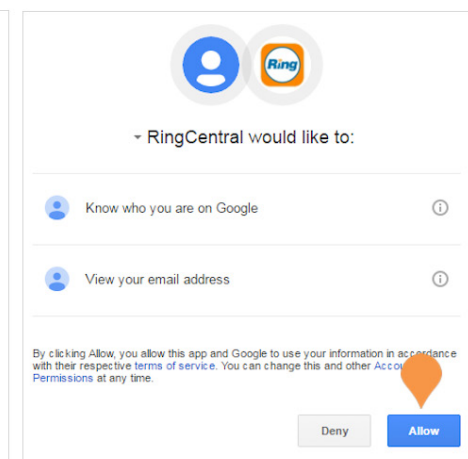
The RingCentral Sign In screen features the RingCentral logo at the top. Below it is a 'Sign In' header. The form includes a country selector (USA), a field for 'Direct, Fax, Main Number', an 'Extension (Optional)' field with a help icon, and a 'Password' field. A 'Remember me' checkbox is checked. A dark blue 'Sign In' button is present. Below the button is a 'Forgot Password?' link. At the bottom, there are three options: 'Email' (with an envelope icon), 'Google' (with the Google logo), and 'Single Sign-on' (with a circular arrow icon). A link for 'New to RingCentral? Sign up here' is at the very bottom.



The Google Sign In screen displays the Google logo and the text 'One account. All of Google.' Below this is 'Sign in with your Google Account'. A large grey circle with a person icon represents the user. Below it is an 'Enter your email' input field, a blue 'Next' button, and a 'Find my account' link. At the bottom, there is a 'Create account' link and a row of Google service icons (Gmail, Maps, YouTube, etc.).



This Google Sign In screen shows a user profile with a blue circle icon and the email 'dave.richards@gmail.com'. Below the email is a 'Password' field with an orange pin icon. A blue 'Sign in' button is below the password field. There are checkboxes for 'Stay signed in' and a 'Forgot password?' link. At the bottom, there is a 'Create account' link and a row of Google service icons.



The Google Permissions screen shows the RingCentral logo and the text 'RingCentral would like to:'. Below this are two permissions: 'Know who you are on Google' and 'View your email address', each with an information icon. At the bottom, there is a paragraph of text about permissions, a 'Deny' button, and an 'Allow' button with an orange pin icon.

## 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

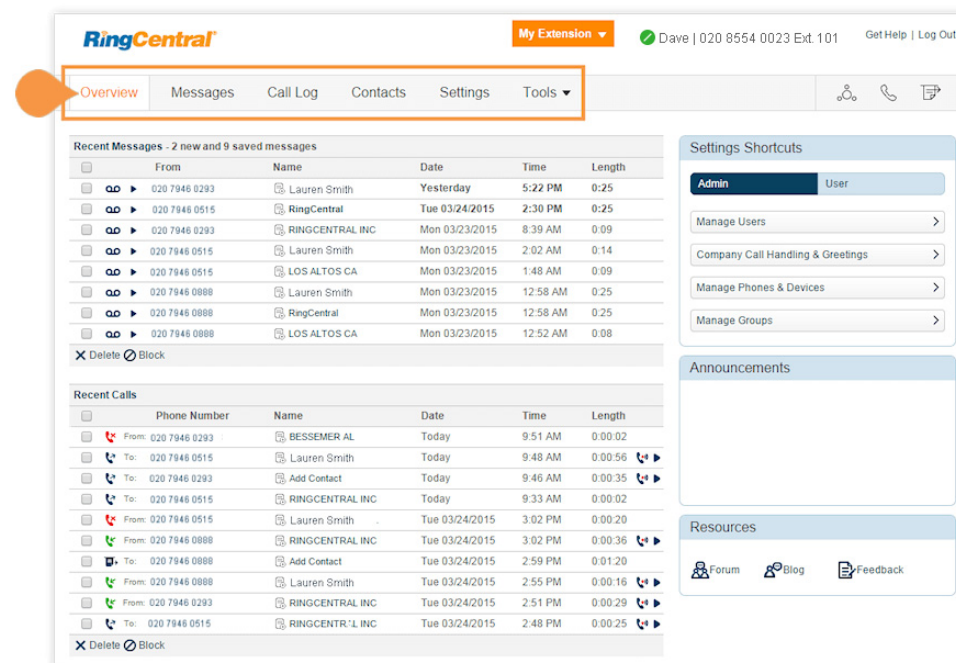
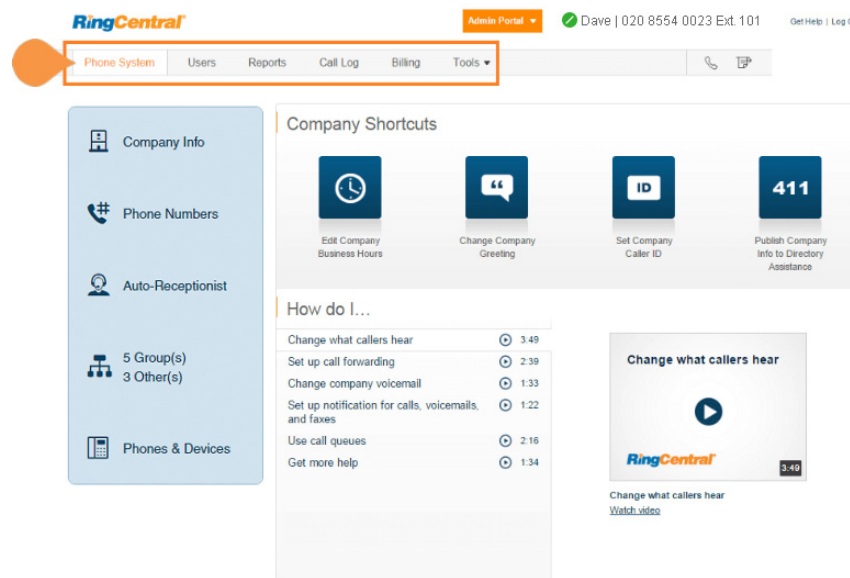
There are a few main functions that administrators can access from any online page. These functions are **Do Not Disturb**, **Conference**, **RingOut**, and **FaxOut**.

## 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

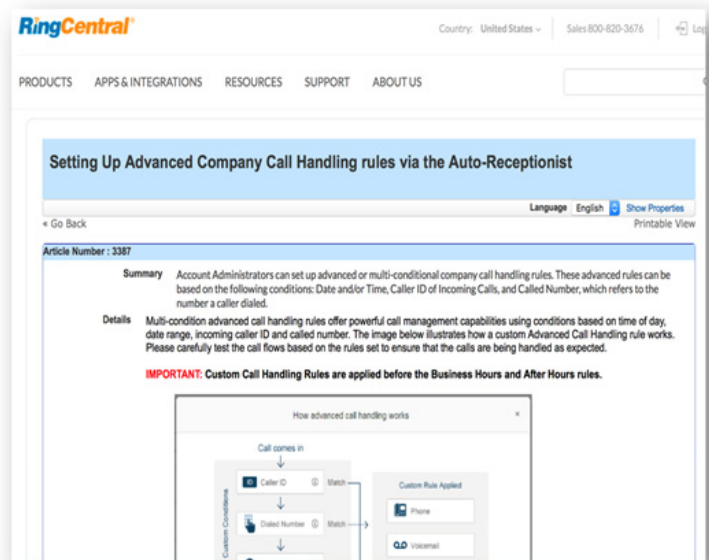
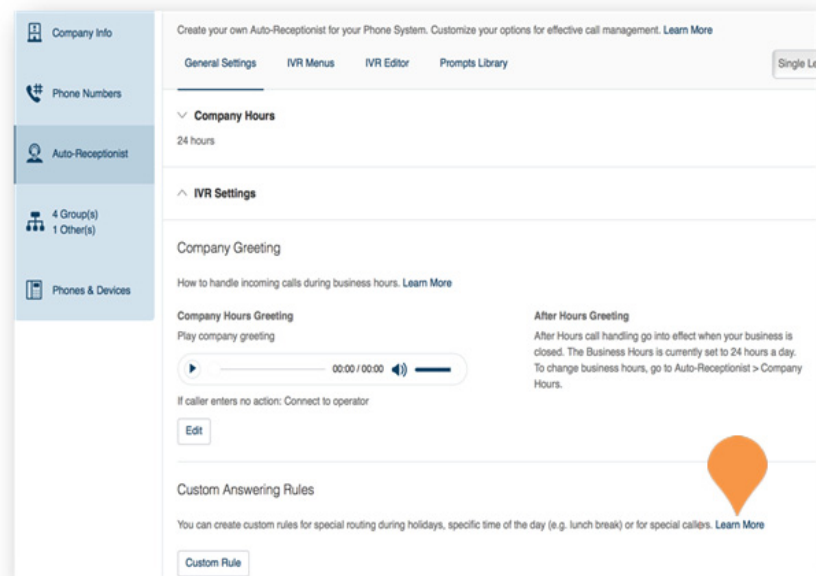
When you switch to the **My Extension** page, you see the standard user settings view of Overview, Messages, Call Log, Contacts, Settings, and Tools. Click on **Settings** to access your individual settings. The **My Extension** tab houses the same settings as a regular user has.



## 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:

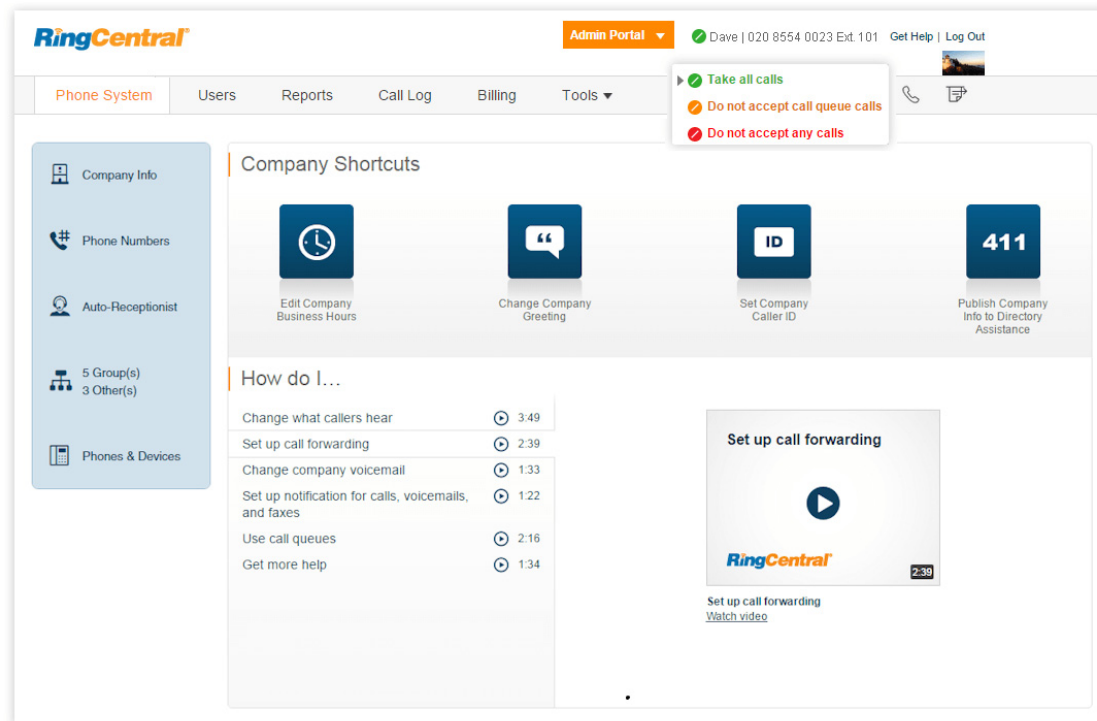
- **Tooltip** icons that display in-product help text to help you successfully configure the feature.
- **Learn More** links that link you to relevant Knowledgebase articles on the RingCentral Customer Care portal for more detailed feature information.



## 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:

- **Do Not Disturb Off: Green** means that you are available to take incoming calls.
- **Do Not Disturb On: Orange** means, "Do not accept call queue calls." These callers are sent to voicemail.
- **Do Not Disturb On: Red** means, "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.

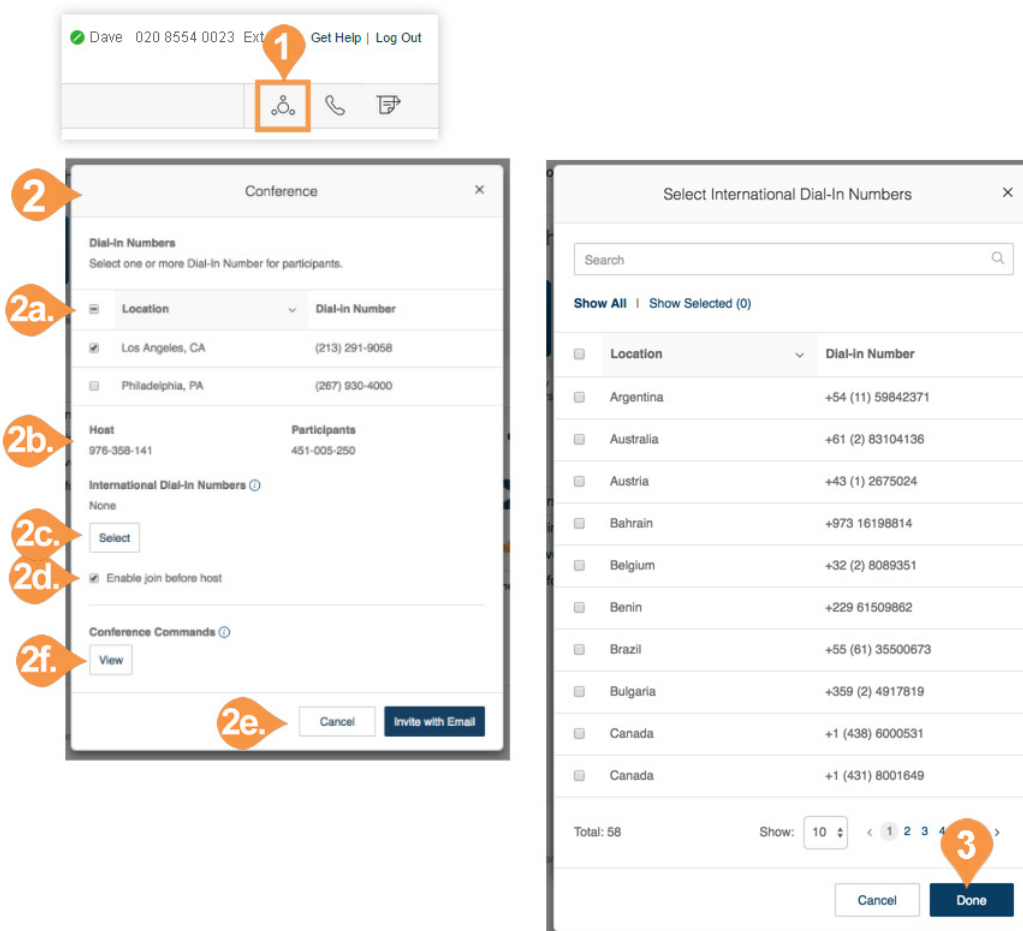
Each conference call can include up to 1000 attendees, enabling you to hold large meetings and broadcasts.

\*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.

### Conference

Dial-In Number: 020 3318 0970

Host: 298-730-769

Participants: 879-989-060

☒ I have international participants ⓘ

☒ Enable join before host

Select International Dial-In Numbers

<input type="checkbox"/> Argentina	+54 1159842371
<input type="checkbox"/> Austria	+43 12675024
<input type="checkbox"/> Bahrain	+973 16198814
<input type="checkbox"/> Brazil	+55 6135500673
<input type="checkbox"/> Bulgaria	+359 (2) 491-7819
<input type="checkbox"/> Canada	+1 (437) 800-0918
<input type="checkbox"/> Chile	+56 229382089
<input type="checkbox"/> China	+86 1059045554
<input type="checkbox"/> Croatia	+385 (1) 777-6559

Invite with Email

Conference Commands > ⓘ

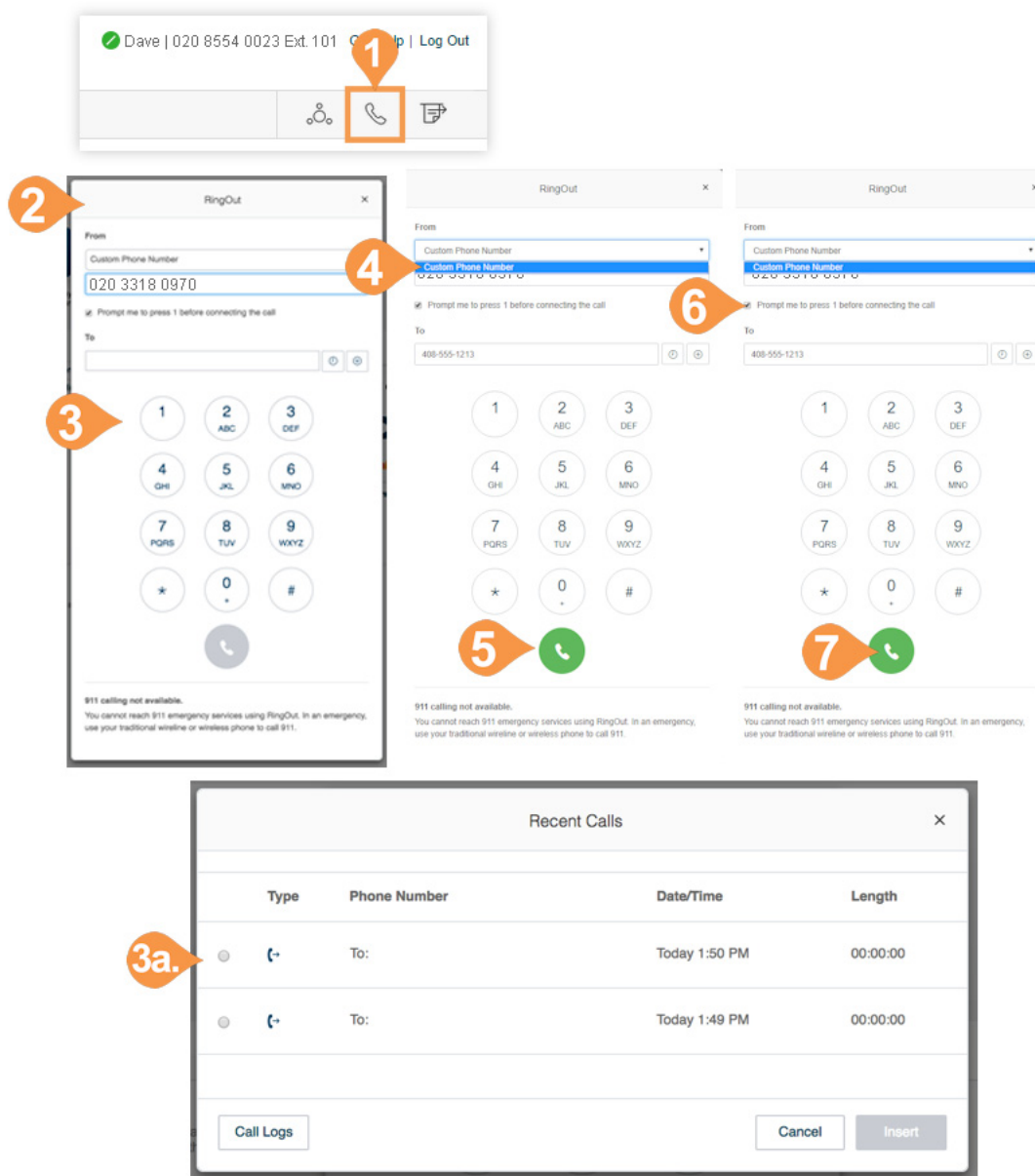
Use this command...	To do this...
* # 2	<b>Caller Count:</b> Keep track of how many people are on the call
* # 3	<b>Leave Conference:</b> Lets the host hang up and end the call
* # 4	<b>Menu:</b> Listen to the list of touchtone commands
* # 5	<b>Set Listening Modes</b> <ul style="list-style-type: none"> <li>Press 1x: <b>Mute callers</b> - Callers can unmute with * # 4</li> <li>Press 2x: <b>Mute callers</b> - Listen only. No unmuting option</li> <li>Press 3x: <b>Unmute callers</b> - Opens the line again</li> </ul>
* # 6	<b>Mute Host Line</b> <ul style="list-style-type: none"> <li>Press once to MUTE</li> <li>Press again to UNMUTE</li> </ul>
* # 7	<b>Secure the Call</b> <ul style="list-style-type: none"> <li>Press once to BLOCK all callers</li> <li>Press again to OPEN the call</li> </ul>
* # 8	<b>Hear sound when people Enter or Exit call</b> <ul style="list-style-type: none"> <li>Press 1x: Turns OFF sound</li> <li>Press 2x: Enter tone is ON Exit tone is OFF</li> <li>Press 3x: Enter tone is OFF Exit tone is ON</li> <li>Press 4x: Turns ON sound</li> </ul>
* 9	<b>Record your conference</b> <ul style="list-style-type: none"> <li>Press once to START recording</li> <li>Press again to STOP recording</li> </ul>

Close

## 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 recognises 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 authorise 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**.

The image shows two screenshots of the RingCentral FaxOut interface. The left screenshot is the 'Send a Fax' window, and the right screenshot is the 'Select Contacts' window. Numbered callouts (1-6) indicate the steps for sending a fax.

**Send a Fax Window:**

- 1:** FaxOut icon in the upper right corner of the main interface.
- 2:** 'To' field for entering recipients.
- 3:** 'Cover Page' section with an 'Enable' checkbox.
- 4:** 'Attach Files' section with a 'Google Drive' dropdown and a 'Browse' button.
- 5:** 'Schedule' section with an 'Enable' checkbox and a 'Send on' date/time picker.
- 6:** 'Schedule' button at the bottom right.

**Select Contacts Window:**

- 2a:** 'Select contact to insert' search bar.
- 2b:** 'Insert' button at the bottom right.

First Name	Last Name	Fax
Jason	Zhang	Business Fax: +6512345667
a	a	Other Fax: +12052345688
a	a	Other Fax: +12052345688
q	q	Business Fax: +441132345678
q	q	Business Fax: +441132345678
		Business Fax: +18662643332
		Business Fax: +12051234
		Business Fax: +1205346

# 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

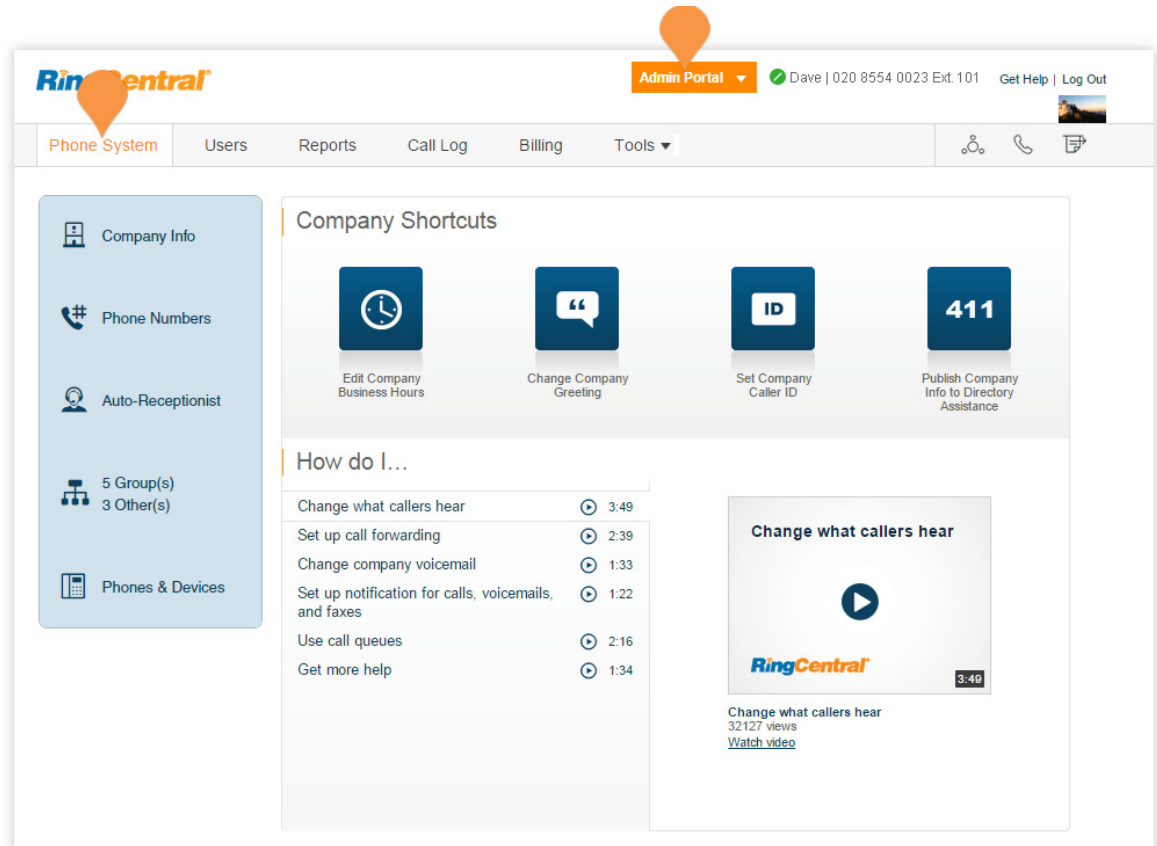
On your **Phone System** page, you have Shortcuts for quick access to commonly used functions, such as:

- 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.



The screenshot shows the RingCentral Admin Portal interface. At the top, there's a navigation bar with the RingCentral logo, an "Admin Portal" dropdown, and user information: "Dave | 020 8554 0023 Ext. 101". There are links for "Get Help" and "Log Out". Below the navigation bar is a tabbed interface with "Phone System" selected. The "Phone System" tab is highlighted in blue and contains a list of settings: "Company Info", "Phone Numbers", "Auto-Receptionist", "5 Group(s) 3 Other(s)", and "Phones & Devices". To the right of the "Phone System" tab is a "Company Shortcuts" section with four icons: "Edit Company Business Hours", "Change Company Greeting", "Set Company Caller ID", and "Publish Company Info to Directory Assistance". Below the shortcuts is a "How do I..." section with a list of videos: "Change what callers hear" (3:49), "Set up call forwarding" (2:39), "Change company voicemail" (1:33), "Set up notification for calls, voicemails, and faxes" (1:22), "Use call queues" (2:16), and "Get more help" (1:34). A video player is shown for "Change what callers hear" with a play button and the RingCentral logo. Below the video player, it says "Change what callers hear 32127 views Watch video".

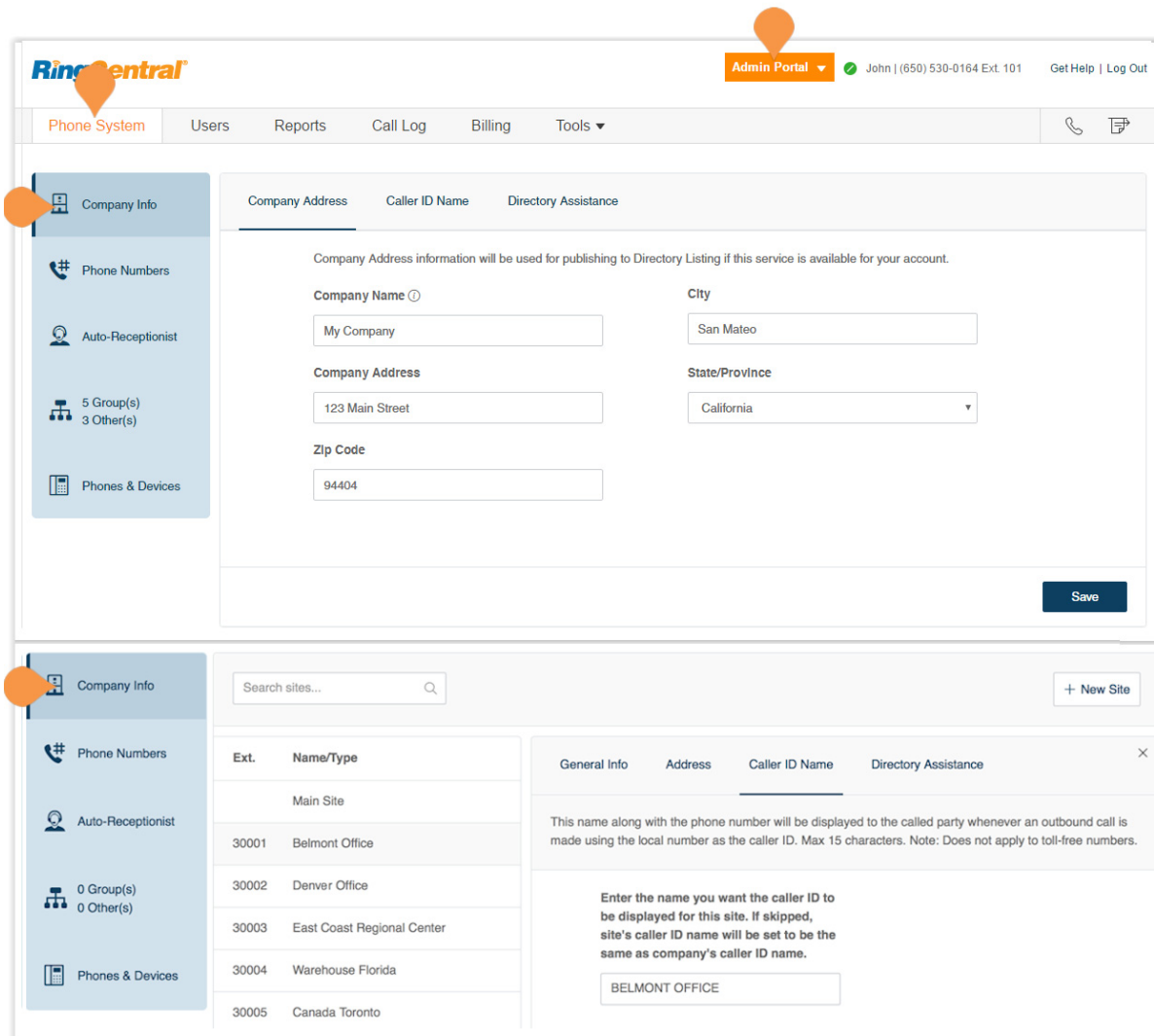
## Company Info

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.



The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an "Admin Portal" dropdown, a user profile "John | (650) 530-0164 Ext. 101", and links for "Get Help" and "Log Out". Below this is a secondary navigation bar with tabs: "Phone System" (highlighted), "Users", "Reports", "Call Log", "Billing", and "Tools".

The main content area is divided into two sections. The top section is for a single-site account, showing the "Company Info" page. The left sidebar contains a menu with "Company Info" (selected), "Phone Numbers", "Auto-Receptionist", "5 Group(s) 3 Other(s)", and "Phones & Devices". The main content area has three tabs: "Company Address", "Caller ID Name", and "Directory Assistance". The "Company Address" tab is active, displaying fields for "Company Name" (My Company), "City" (San Mateo), "Company Address" (123 Main Street), "State/Province" (California), and "Zip Code" (94404). A "Save" button is at the bottom right.

The bottom section shows the "Company Info" page for a multi-site account. The left sidebar is identical. The main content area has a search bar "Search sites..." and a "+ New Site" button. Below this is a table listing sites:

Ext.	Name/Type
	Main Site
30001	Belmont Office
30002	Denver Office
30003	East Coast Regional Center
30004	Warehouse Florida
30005	Canada Toronto

To the right of the table is a panel with tabs: "General Info", "Address", "Caller ID Name", and "Directory Assistance". The "Caller ID Name" tab is active, displaying a text field with "BELMONT OFFICE". A note above the field states: "This name along with the phone number will be displayed to the called party whenever an outbound call is made using the local number as the caller ID. Max 15 characters. Note: Does not apply to toll-free numbers."

## 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**.

The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is highlighted with a callout 1. Below the navigation bar, the 'Phone System' tab is selected, and the 'Company Info' option in the left sidebar is highlighted with a callout 2. The 'Company Address' sub-tab is selected with a callout 3. The main content area contains a form with the following fields: 'Company Name' (with a callout 4), 'City', 'Company Address', 'State/Province', and 'Zip Code'. A 'Save' button is located at the bottom right, highlighted with a callout 5. A note at the top of the form states: 'Company Address information will be used for publishing to Directory Listing if this service is available for your account.'

## 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.

The screenshot shows the RingCentral Admin Portal interface. At the top right, the 'Admin Portal' dropdown is highlighted with an orange circle 1. Below the header, the 'Phone System' tab is selected in the navigation bar, with an orange circle 2 pointing to it. In the left sidebar, 'Company Info' is selected, with an orange circle 2 pointing to it. The 'Caller ID Name' sub-tab is active, with an orange circle 3 pointing to it. The main content area shows a text input field with 'My Company' entered, with an orange circle 4 pointing to it. A 'Save' button is at the bottom right, with an orange circle 5 pointing to it. The interface includes a top navigation bar with 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar also includes 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) 3 Other(s)', and 'Phones & Devices'. The main content area has tabs for 'Company Address', 'Caller ID Name', and 'Directory Assistance'. A note states: 'This name along with the phone number will be displayed to the called party whenever an outbound call is made using the local number as the caller ID. Max 15 characters. Note: Does not apply to 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.

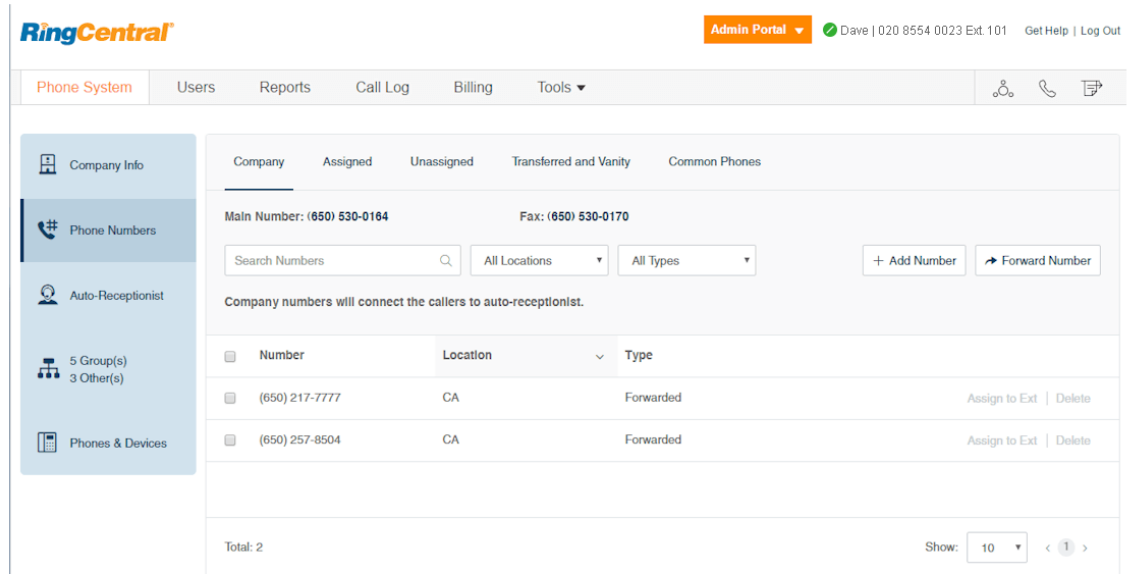
The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible, along with a user profile 'Dave | 020 8554 0023 Ext. 101' and links for 'Get Help' and 'Log Out'. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. On the left sidebar, 'Company Info' is selected, showing options for 'Phone Numbers', 'Auto-Receptionist', and 'Phones & Devices'. The 'Directory Assistance' tab is active, showing a form to submit business information. The form includes fields for 'Main Number', 'Fax (optional)', 'Company Name', 'City', 'Company Address', 'State/Province', 'Email', and 'Zip Code'. A 'Status' field shows 'Unpublished'. A note states: 'Note: if you change the details on this screen, the information will also be updated in the Company Address.' Below this, a section 'List your business phone number and address in Directory Assistance:' is followed by 'Features:' which includes 'Publish your Company Name, Number and Address' and 'Enable potential customers to readily find your business'. A 'Next' button is at the bottom right. A modal window titled 'Review Listing Details' is open, showing a summary of the entered information: Main Number: (850) 555-9449, Company Name: My Company, Company Address: 123 Main Street, City: San Mateo, State: California, Zip Code: 94404, Email: dave.richards@mycompany.com. It also includes the terms of service and a checkbox for 'I agree to the terms of service.', which is checked. 'Back' and 'Publish' buttons are at the bottom of the modal.

## 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.



The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information: 'Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out'. Below this is a secondary navigation bar with tabs: 'Phone System' (selected), 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. A left sidebar contains icons and labels for 'Company Info', 'Phone Numbers' (selected), 'Auto-Receptionist', '5 Group(s) 3 Other(s)', and 'Phones & Devices'. The main content area is titled 'Company' and has sub-tabs: 'Company', 'Assigned', 'Unassigned', 'Transferred and Vanity', and 'Common Phones'. It displays the 'Main Number: (650) 530-0164' and 'Fax: (650) 530-0170'. Below this is a search bar and filters for 'All Locations' and 'All Types', with '+ Add Number' and 'Forward Number' buttons. A message states: 'Company numbers will connect the callers to auto-receptionist.' A table lists the numbers:

Number	Location	Type	
(650) 217-7777	CA	Forwarded	<a href="#">Assign to Ext</a>   <a href="#">Delete</a>
(650) 257-8504	CA	Forwarded	<a href="#">Assign to Ext</a>   <a href="#">Delete</a>

At the bottom, it shows 'Total: 2' and a pagination control: 'Show: 10 < 1 >'.

## 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 (personalised) 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 maximise 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**.

The screenshot shows the RingCentral Admin Portal interface. The sidebar on the left has 'Phone System' selected, with 'Phone Numbers' highlighted. The main area shows the 'Company' tab under 'Phone Numbers'. It displays the Main Number (650) 530-0164 and Fax (650) 530-0170. Below this is a table of existing numbers:

Number	Location	Type	Actions
(650) 217-7777	CA	Forwarded	Assign to Ext   Delete
(650) 257-8504	CA	Forwarded	Assign to Ext   Delete

Below the table are three screenshots of the 'Add Number' wizard:

- Step 1: Select Numbers**: Shows options for 'Local (Domestic)', 'Toll-Free', and 'Vanity'. It includes fields for 'Select State/Province' (California) and 'Select Area Code' (Select).
- Step 2: Assign to Ext.**: Shows options to assign the number to 'Auto-Receptionist' or 'Selected Extension'.
- Step 4: Order Confirmation**: Shows a 'Review and Confirm Charges' section with a charge of '\$5.00' per month for up to 1 additional number.

## 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**.

The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible. The 'Phone System' tab is selected in the top navigation bar. On the left sidebar, 'Phone Numbers' is highlighted. The main content area shows the 'Assigned' tab for phone numbers. A table lists assigned numbers with columns for Number, Location, Assigned to, Ext., and Type. Below the table, three screenshots of the 'Add Number' workflow are shown:

- Step 1: Select Numbers**: Shows the 'Select Number Type' (Local (Domestic), Toll-Free, Vanity), 'Select State/Province' (California), and 'Select Area Code' (Select) fields. The 'Add Numbers' button is at the bottom.
- Step 2: Assign to Ext.**: Shows the 'Assign selected number to:' section with radio buttons for 'Auto-Receptionist' (selected) and 'Selected Extension'. The 'Next' button is at the bottom.
- Step 4: Order Confirmation**: Shows the 'Review and Confirm Charges' section with 'Up to 1 additional numbers' and 'Per month: \$5.00'. The 'Done' button is at the bottom.

## 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**.

The screenshot illustrates the process of forwarding a number in the RingCentral Admin Portal. It shows the navigation from the Admin Portal to the Phone System tab, then to Phone Numbers, and finally to the Assigned tab. The 'Forward Number' button is highlighted. A modal window titled 'Forward My Calls to RingCentral' is open, showing a progress bar with steps: 1. Enter Existing Numbers, 2. Assign to Ext., 3. Confirmation. The modal contains a form to enter an existing phone number and a 'Next' button. Below the modal, a diagram shows the call flow: Inbound Calls to (650) 555-1212, which forwards to the RingCentral Auto-Receptionist. Another modal shows the 'Forward My Calls to RingCentral' screen with a progress bar and instructions for ordering call handling services and printing the screen for reference. The final step shows a 'Done' button.

## 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.

RingCentral Admin Portal

Admin Portal | Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out

Phone System | Users | Reports | Call Log | Billing | Tools

Company Info | Phone Numbers | Auto-Receptionist | 5 Group(s) 3 Other(s) | Phones & Devices

Company | Assigned | **Unassigned** | Transferred and Vanity | Common Phones

Search Numbers | All Locations | All Types

Number	Location	Type
(650) 491-0148	San Bruno, CA	Desk Phone
(650) 491-0149	San Bruno, CA	Desk Phone
(650) 491-0153	San Bruno, CA	Unassigned User
(650) 515-0157	San Bruno, CA	Desk Phone
(650) 515-0161	San Bruno, CA	Unassigned User
(650) 763-0151	San Bruno, CA	Unassigned User
(650) 763-0153	San Bruno, CA	Desk Phone

Total: 21 | Show: 10 | < 1 2 3 >

## 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 US Number, Toll Free Number, Canadian Number, International Number.

The screenshot displays the RingCentral Admin Portal interface. The sidebar on the left shows the 'Phone Numbers' section selected. The top navigation bar includes the 'Phone System' tab and a 'Tools' dropdown. The main content area is titled 'Transferred and Vanity' and contains a search bar and a 'Transfer Numbers' button. Below this, there are two tables: 'Transferred Orders' and 'Pending Vanity Numbers'.

Status	Order Number	Date Created	Date Completed
✓	813456645	01/20/2016	01/20/2016
✗	813456345	04/07/2016	N/A
⚙️	813456234	04/20/2016	N/A
✓	813412345	01/09/2016	01/09/2016

Phone Number	Date Created
813456645	01/20/2016
813456678	03/12/2016
81341234	01/09/2016

## 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 139.

The screenshot shows the RingCentral Admin Portal interface. At the top right, the 'Admin Portal' dropdown is highlighted with a red circle and the number 1. Below the header, the 'Phone System' tab is selected in the main navigation bar, indicated by a red circle and the number 2. In the left sidebar, the 'Phone Numbers' menu item is highlighted with a red circle and the number 4. In the main content area, the 'Common Phones' sub-tab is selected, indicated by a red circle and the number 3. The table below shows a list of common phones with columns for 'Number' and 'Location'. A single entry is visible: (650) 555-5654 at Woodside, CA. The table has a search bar and a filter dropdown for 'All Locations'. At the bottom, it shows 'Total: 0' and a 'Show: 10' dropdown.

Number	Location
(650) 555-5654	Woodside, CA

Total: 0      Show: 10      < 1 >



## Auto-Receptionist

## Auto-Receptionist Settings

Create your own auto-receptionist for your phone system. Customise 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 48](#).

### 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.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information: 'Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out'. The main navigation menu on the left includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' section is expanded, showing 'Company Info', 'Phone Numbers', 'Auto-Receptionist' (highlighted), '5 Group(s) 2 Other(s)', and 'Phones & Devices'.

The 'Auto-Receptionist' settings are shown in two panels. The top panel is for a single site, with a 'Single Level' dropdown. It includes sections for 'General Settings', 'IVR Menu', 'IVR Editor', and 'Prompts Library'. The 'General Settings' section is expanded, showing 'Company Hours' (24 hours), 'IVR Settings' (Operator Ext.: John Smith, 101), 'Dial-by-Name Directory' (On), 'Call Recording' (On-demand: On, Automatic: Off), and 'Regional Settings' (Time Zone: Pacific Time (US & Canada)).

The bottom panel is for a multi-site view, with a 'Multi-level' dropdown. It includes a 'Search sites...' search bar and a table of sites. The table has columns for 'Ext.' and 'Name/Type'. The sites listed are:

Ext.	Name/Type
	Main Site
30001	Belmont Office
30002	Denvor Office
30003	East Coast Regional Center
30004	Warehouse Florida
30005	Canada Toronto
30006	California Shop

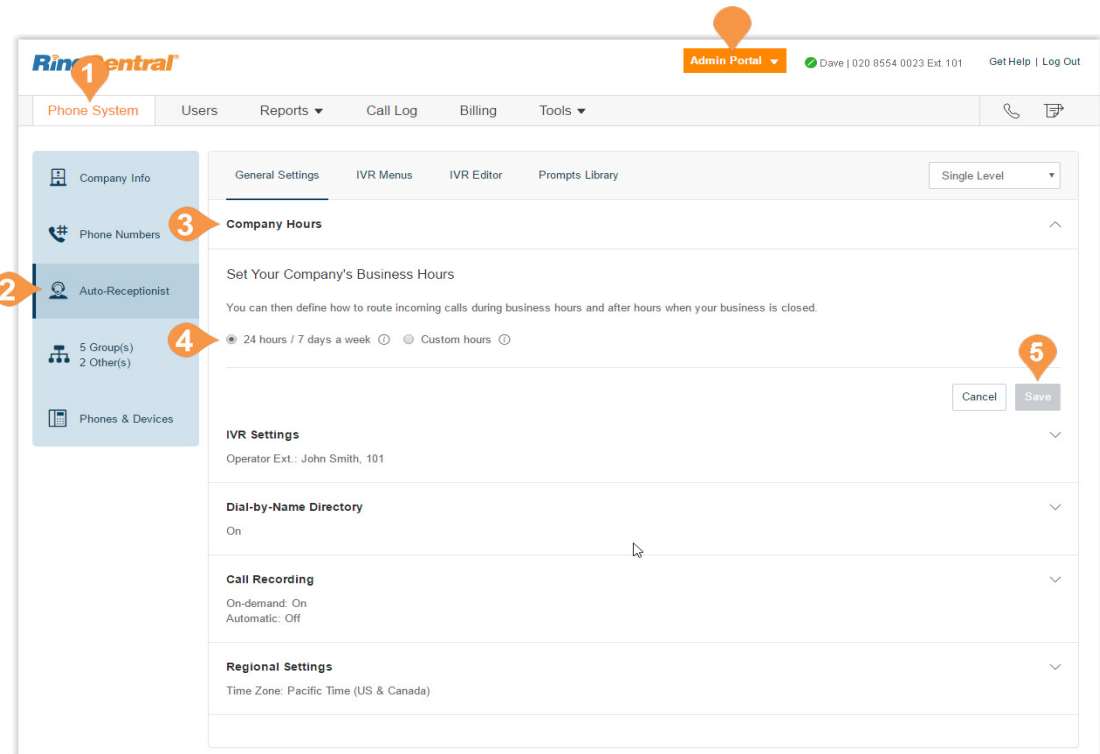
To the right of the table, the settings for the 'Belmont Office' are displayed, including 'Site Hours' (24 hours), 'IVR Settings' (Site Fax/SMS Recipient: Charlton Ho, Ext. 101), and 'Regional Settings' (Time Zone: (GMT-08:00) Pacific Time (US & Canada)).

## Company Business Hours

Customise 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**.



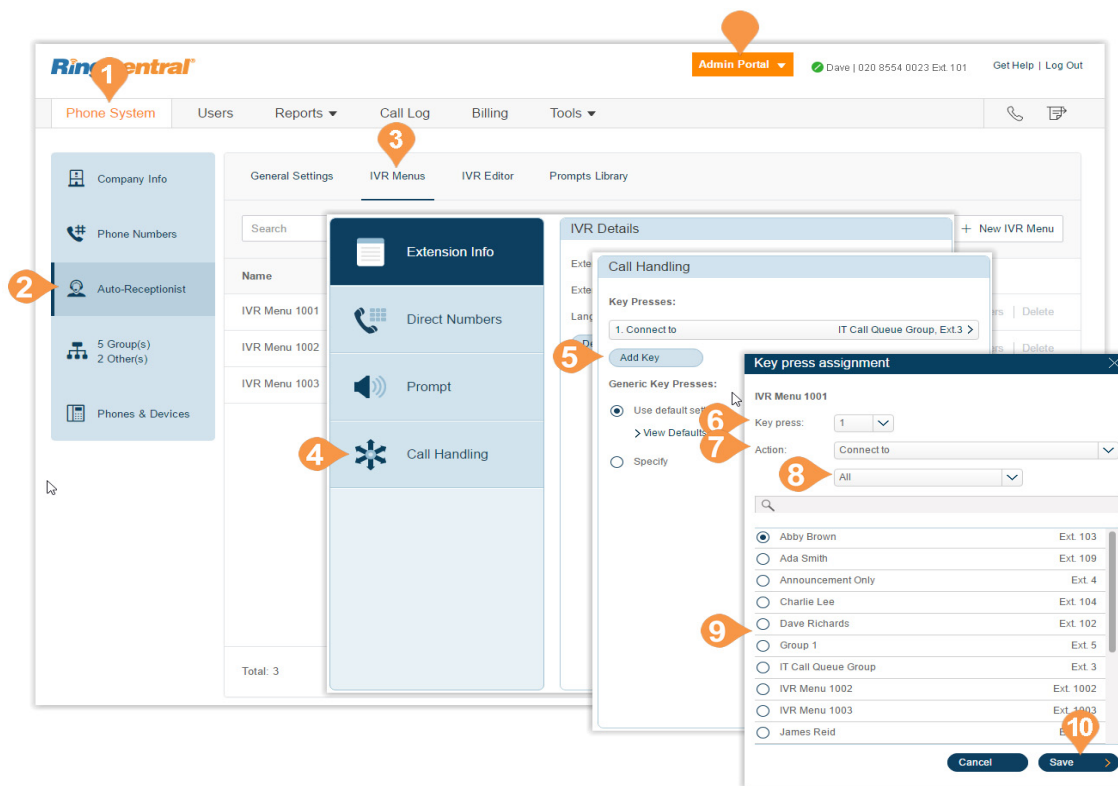
## Company Call Handling

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 58.

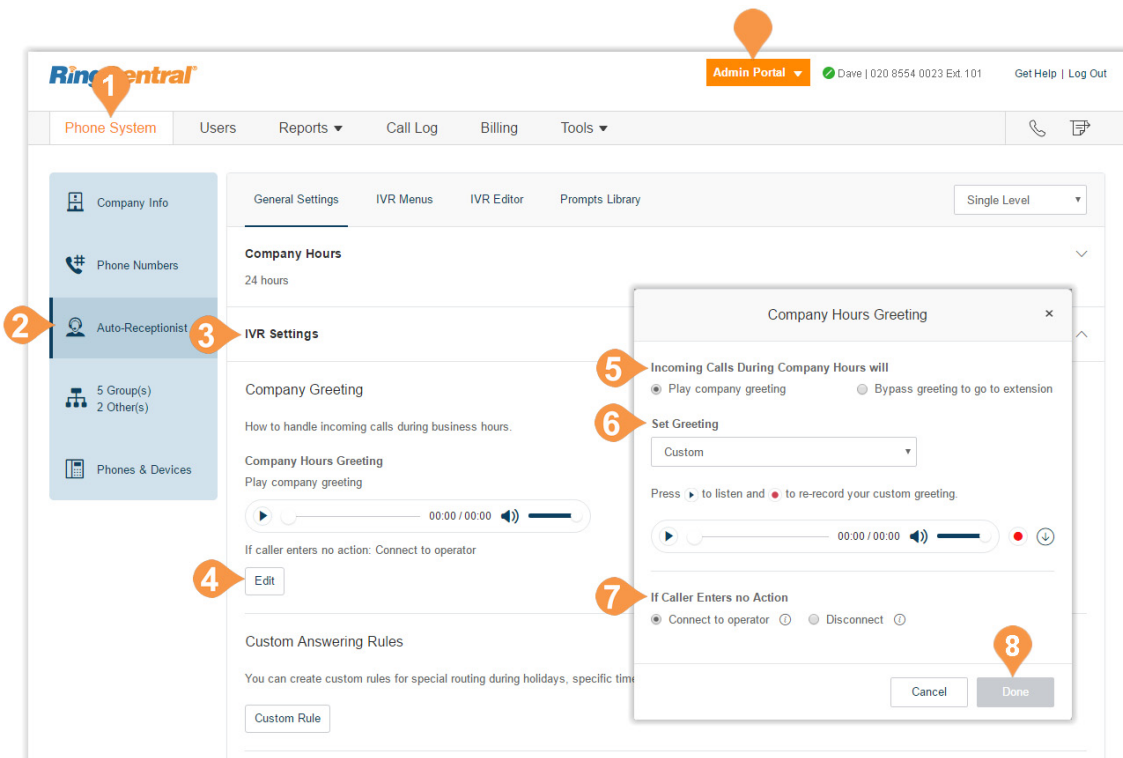


## Company Greeting and Menu

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 67.
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:

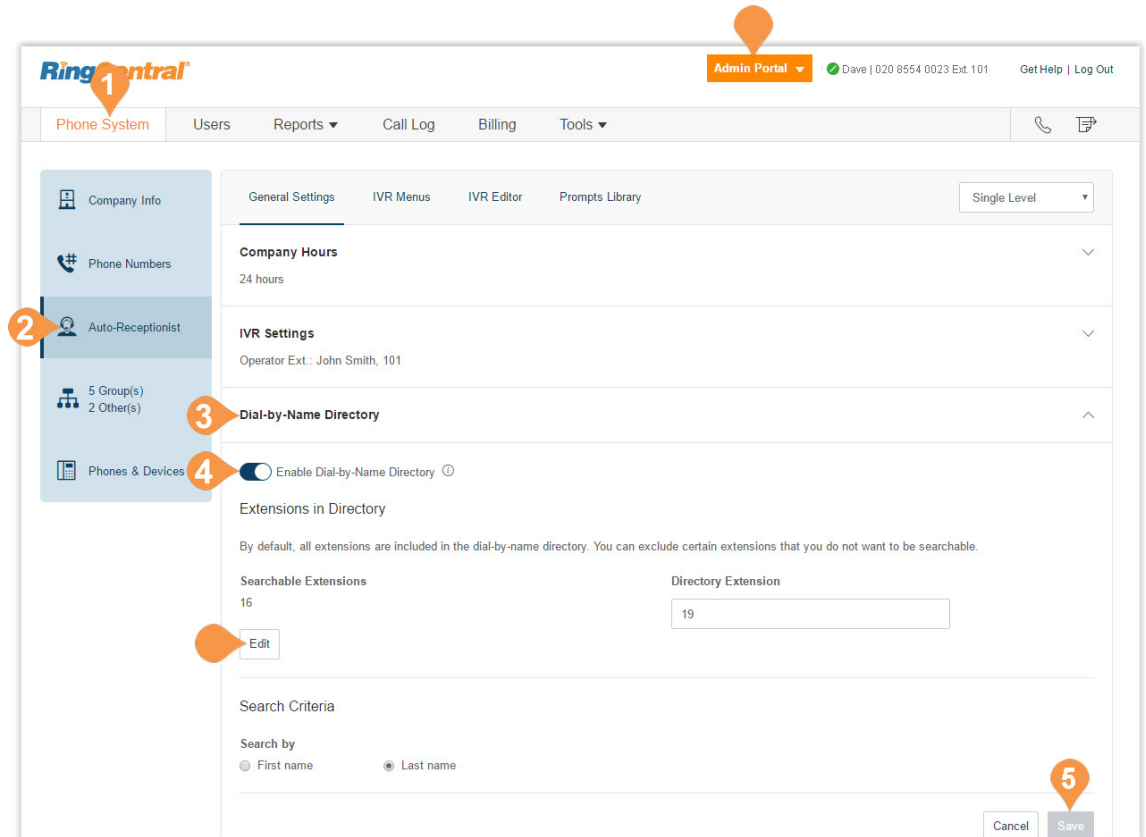
1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Regional Settings**.
4. Under **Regional Settings**, select options:
  - Select your **Time Zone**.
  - Select **Time Format** as 12hr or 24hr.
  - Select your **Home Country Code**.
  - Select 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.

RingCentral

Admin Portal Dave | 020 8554 0023 Ext. 101 Get Help | Log Out

Phone System Users Reports Call Log Billing Tools

Company Info Phone Numbers Auto-Receptionist 5 Group(s) 2 Other(s) Phones & Devices

General Settings IVR Menus IVR Editor Prompts Library Single Level

Company Hours 24 hours

IVR Settings

Company Greeting How to handle incoming calls Company Hours Greeting Play company message If caller enters no answer Edit Custom Answered You can create custom rules Custom Rule General IVR Settings

Operator Extension (0) x

Callers will press 0 to reach the Operator extension. Select the extension to use for the Operator, which receives all calls and messages by default.

Search All Departments

Select	Name	Ext.	Type	Department
<input type="radio"/>	Abby Brown	103	User	Sales
<input type="radio"/>	Ada Smith	109	User	
<input type="radio"/>	Announcement Only	4	Announcement-Only Extension	
<input type="radio"/>	Charlie Lee	104	User	Marketing
<input type="radio"/>	Dave Richards	102	User	Sales
<input type="radio"/>	Group 1	5	Shared Lines	
<input type="radio"/>	IT Call Queue Group	3	Call Queue	
<input type="radio"/>	James Reid	107	User	
<input type="radio"/>	Jane Smith	110	User	
<input type="radio"/>	John Jones	108	User	

Total: 15 Show: 10 < 1 2 > Cancel Done

Operator Extension (0) John Smith, Ext. 101

Select Extension Cancel Save



## 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**

System ignores any '0' dialed by 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.

Removal of the destination extension:

A warning shows that the extension being removed is in use for 0-dial handling and you are given the option to cancel the removal.

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

6. Click **Save**.

The screenshot illustrates the RingCentral Admin Portal interface for configuring the Auto-Receptionist. The top navigation bar includes the 'Admin Portal' dropdown and user details (Dave | 020 8554 0023 Ext. 101). The left sidebar shows the 'Phone System' tab selected, with a sub-menu containing 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) 2 Other(s)', and 'Phones & Devices'. The 'Auto-Receptionist' section is active, displaying 'General Settings', 'IVR Menus', 'IVR Editor', and 'Prompts Library'. The 'IVR Settings' section is expanded, showing 'Company Hours' (24 hours) and 'IVR Settings'. Under 'IVR Settings', there are sections for 'Company Greeting', 'Company Hours Greeting', and 'After Hours Greeting'. The 'Zero Dialing' section is highlighted, showing three radio button options: 'Connect to Company Greeting', 'Do nothing', and 'Connect to Extension'. The 'Connect to Extension' option is selected, with sub-options 'Connect to Operator' and 'Connect to Extension'. The 'Connect to Extension' sub-option is also selected. At the bottom right, there are 'Cancel' and 'Save' buttons.

## 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.
  - You can designate the kind of number by using **Number Type**.
4. Enter the label text in the **Name** field.
5. Click **Save**.

\*This option is available for Ultimate users.

The screenshot illustrates the process of defining a phone number label in the RingCentral Admin Portal. It is divided into two main sections: the 'Phone System' overview and the 'Direct Number' configuration window.

**Phone System Overview:**

- Step 1:** The 'Admin Portal' dropdown is visible in the top right corner.
- Step 2:** The 'Phone System' tab is selected in the top navigation bar.
- Step 3:** The 'Phone Numbers' option is selected in the left-hand sidebar.
- The main content area shows a list of phone numbers under the 'Company' tab. The number **(650) 555-0012** is highlighted.

**Direct Number Configuration Window:**

- Step 4:** The 'Name' field is populated with 'Hayward Branch'.
- The 'Number Type' is set to 'Voice and Fax'.
- Under 'Calls to this number will be connected to:', the 'Auto-Receptionist' option is selected.
- Step 5:** The 'Save' button is highlighted in the bottom right corner.

## On-demand Call Recording

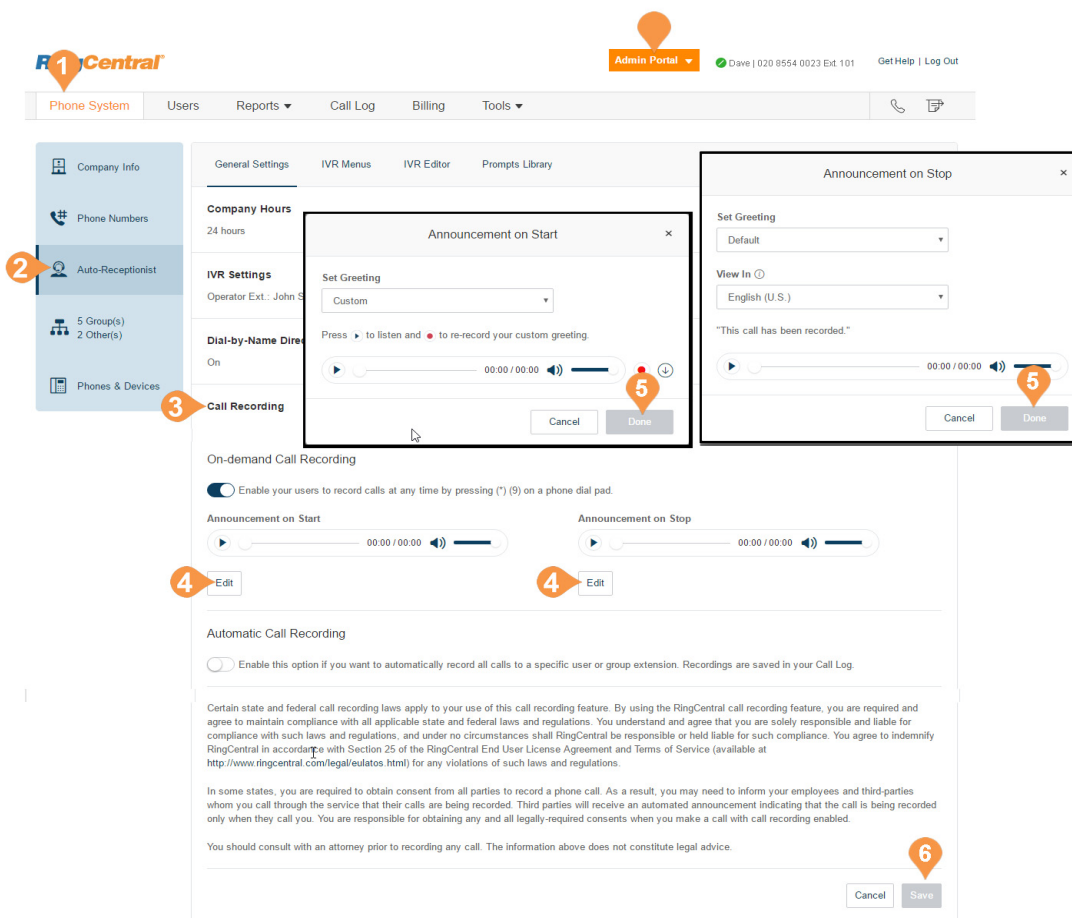
On-demand Call Recording makes it easy for RingCentral users to record calls they make or receive. When you enable On-demand Call Recording, users can activate it by pressing \*9 on their phone's dial pad. NOTE: State and federal laws require that your callers hear a call-recording notification before 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.

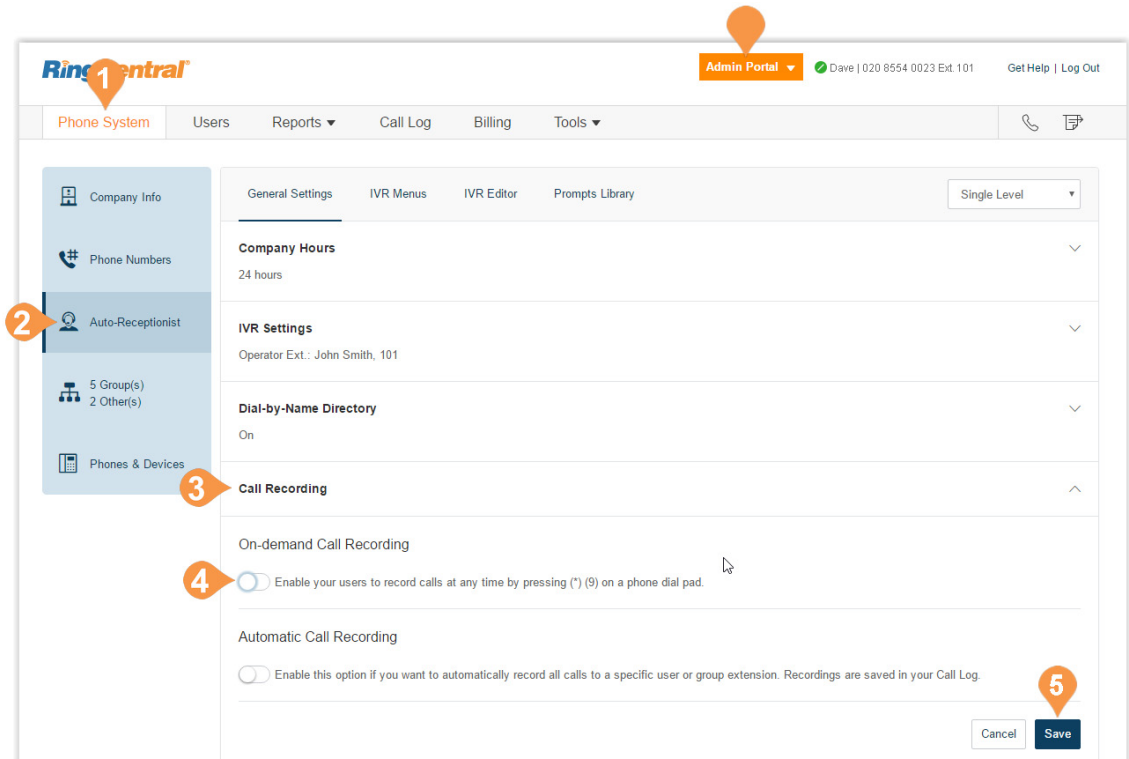
1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**. Slide the button on for **On-demand Call Recording**.
4. Click **Edit** to change,
  - **Announcement on Start**
  - Click **Set Greeting** and choose **Default** or **Custom**.
  - 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 47.

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**.

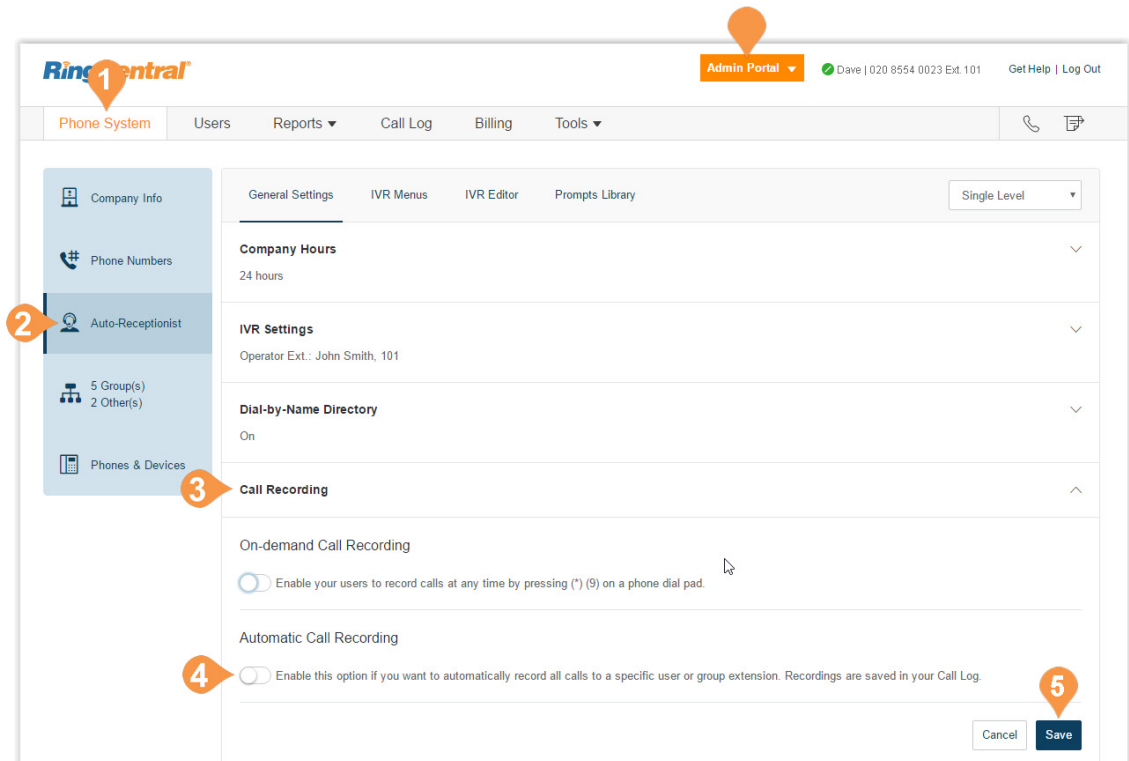
\*This option is available for Office Premium and Ultimate.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information (Dave | 020 8554 0023 Ext 101). The main navigation tabs are Phone System, Users, Reports, Call Log, Billing, and Tools. The left sidebar shows the 'Auto-Receptionist' section selected. The main content area displays the 'Call Recording' settings. The 'On-demand Call Recording' section has a toggle switch for 'Enable your users to record calls at any time by pressing (\*) (9) on'. The 'Automatic Call Recording' section has a toggle switch for 'Enable this option if you want to automatically record all calls to a specific user or group extension. Recordings are saved in your Call Log.' Below this are three checkboxes: 'Play periodic tones for outbound calls' (checked), 'Play Call Recording Announcement for Outbound Calls' (unchecked), and 'Allow mute in auto call recording' (unchecked). The 'Call Recording Announcement' section features an audio player with a play button and a duration of 00:00 / 00:00. The 'Extensions to Record' section shows a list of extensions with an 'Edit' button. A 'Call Recording Announcement' pop-up is open, showing options for 'Set Greeting' (Custom), 'Recording by' (Phone), and 'Call me at'. The pop-up also has 'Cancel' and 'Done' buttons. The bottom of the page contains a legal disclaimer and 'Cancel' and 'Save' buttons.

## 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

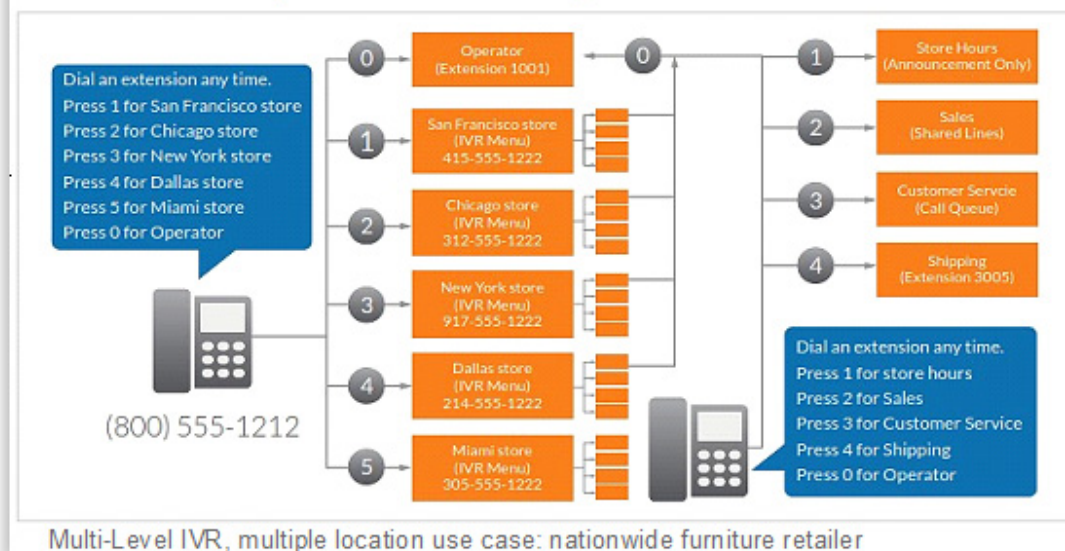
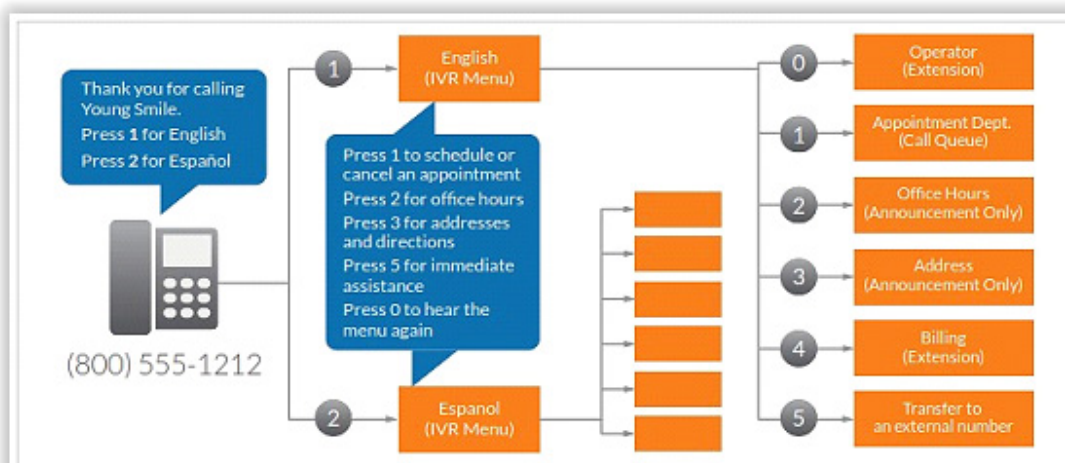
The RingCentral Multi-level IVR facility supports up to 250 menus for each account you create. It provides callers with options to self-select how they can reach a person or a department in your company. The first step in creating a multi-level IVR menu is to lay out a call-routing plan similar to the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





## Switch to Multi-level IVR Mode

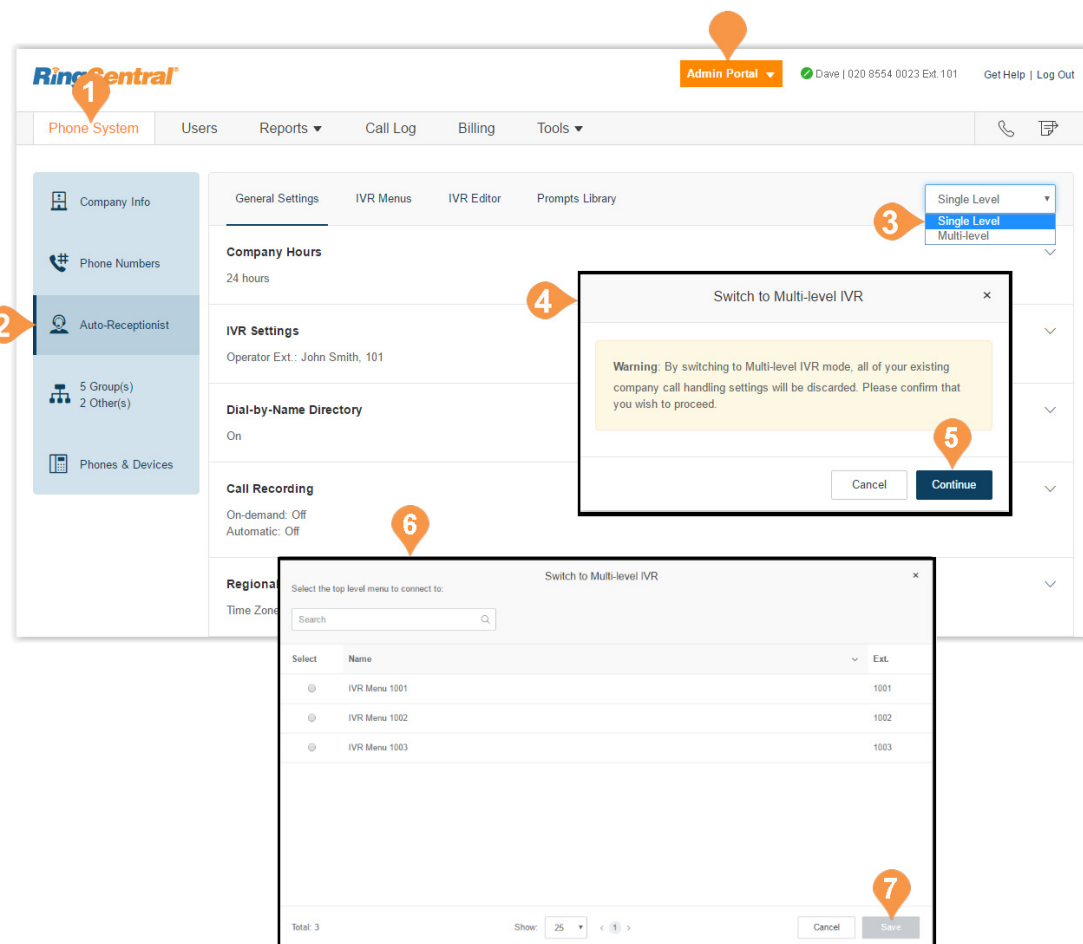
As an option, you can change your Auto-Receptionist from a single-level to a multi-level IVR to serve users at multiple locations or to provide callers with multi-lingual menus.

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.
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 55.





## 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**.

RingCentral Admin Portal

Admin Portal | Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out

Phone System | Users | Reports | Call Log | Billing | Tools

Company Info | Phone Numbers | **Auto-Receptionist** | 5 Group(s) | 2 Other(s) | Phones & Devices

General Settings | IVR Menus | IVR Editor | Prompts Library | Multi-level

**Company Hours**  
24 hours

**IVR Settings**

Top Level IVR Menu  
Incoming calls to company number will be connected to the following top menus.

Company Hours Top Menu  
IVR Menu 1001, Ext. 1001  
No prompt defined for the selected IVR Menu.  
Select IVR Menu

After Hours Top Menu  
After Hours call handling go into effect when your business is closed. The Business Hours is currently set to 24 hours a day. To change business hours, go to Auto-Receptionist > Company Hours.

Custom Answering Rules  
You can create custom rules for special routing during holidays, specific time of the day (e.g. lunch break) or for special callers.  
Custom Rule

**General IVR Settings**  
Specify general navigation keys. All the menus will follow these settings unless you overwrite them on an individual menu level.

Press #  
Repeat menu greeting

Press \*  
Return to previous menu

If caller enters no action after the prompt played 3 times  
☒ Disconnect the call  
☐ Connect to extension

Company Fax/SMS Recipient  
Select the extension below to receive all faxes and Business SMS when connecting incoming calls to company numbers to IVR menu with Multi-level IVR enabled.  
Charlie Lee, Ext. 104  
Select Extension

Cancel 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:

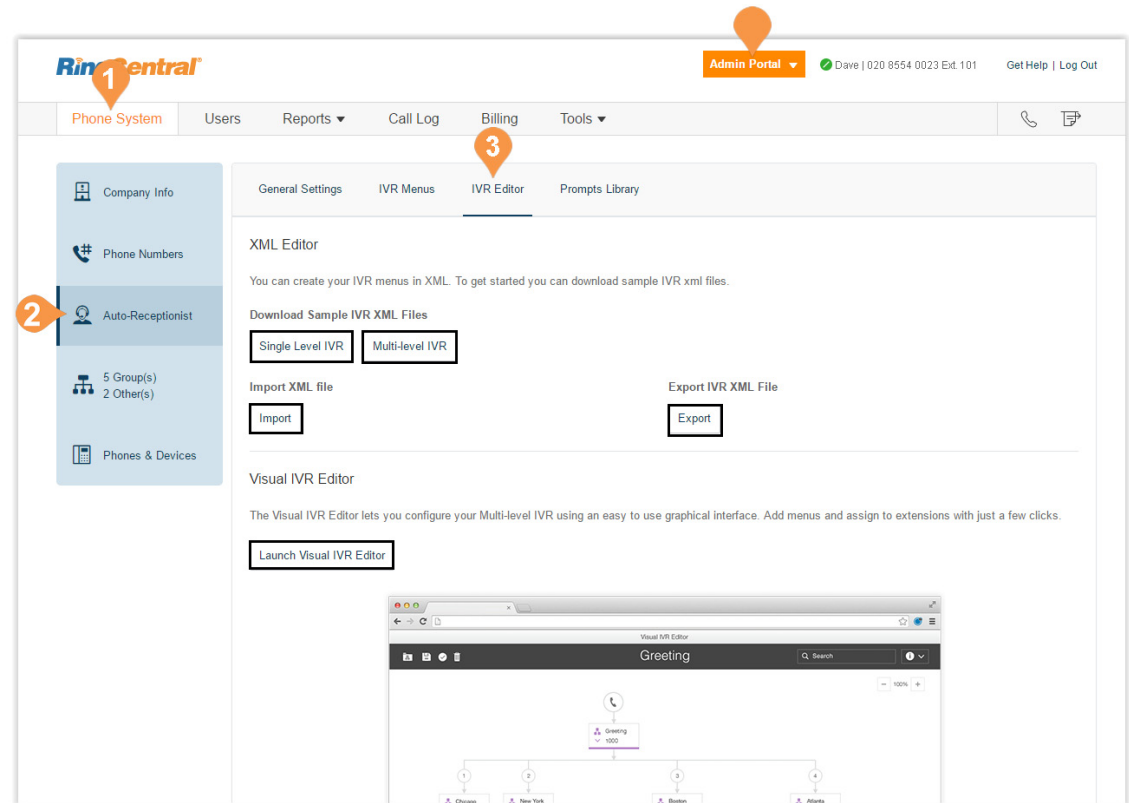
- Configure IVR menus with the Visual IVR Editor
- Import prompt recordings
- Record prompts
- Import and export XML files

**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.



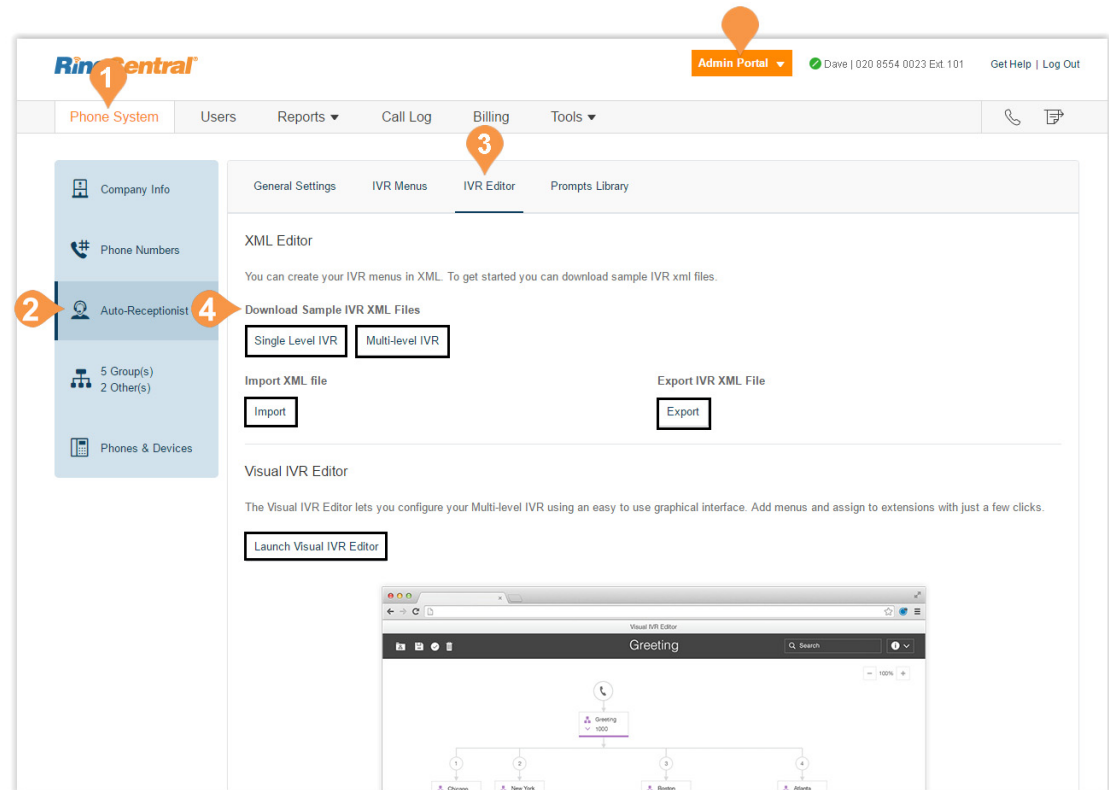
## Import or Export XML Files

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

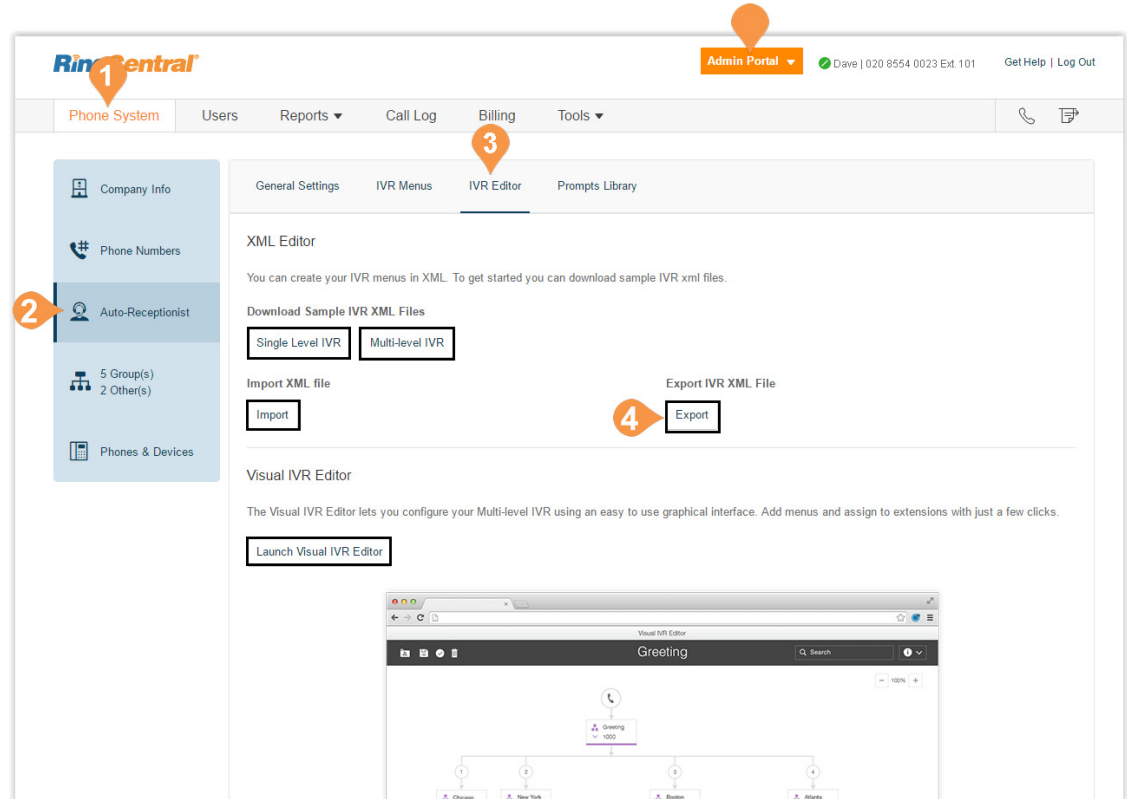
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab. the XML Editor displays.
4. Under **Download Sample IVR XML Files**,
  - Click Single Level IVR
  - Click Multi-level IVR

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.

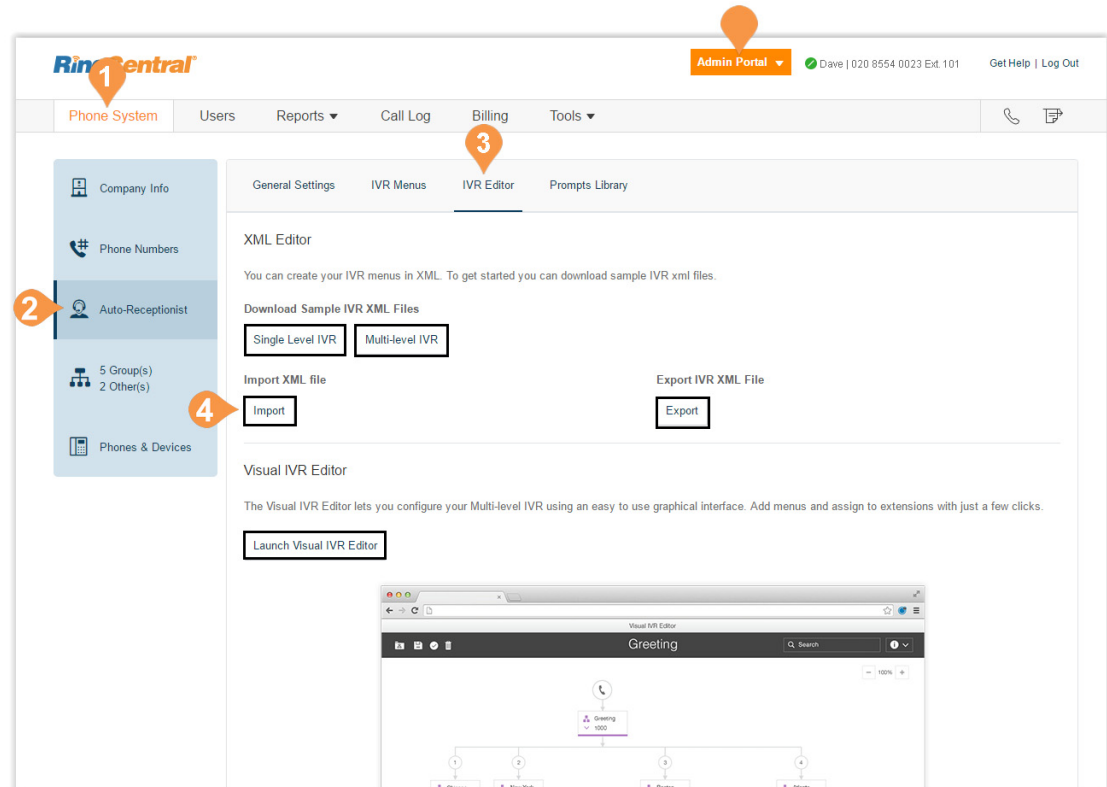


The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information. The main navigation tabs are 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is selected, and the left sidebar shows 'Auto-Receptionist' highlighted. The 'IVR Editor' sub-tab is active, showing the 'XML Editor' section. This section includes instructions on creating IVR menus in XML and provides buttons for 'Single Level IVR', 'Multi-level IVR', 'Import', and 'Export'. The 'Export' button is highlighted with an orange circle and the number 4. Below the XML Editor is the 'Visual IVR Editor' section, which includes a 'Launch Visual IVR Editor' button. At the bottom, a preview of the Visual IVR Editor shows a 'Greeting' menu with a tree diagram of IVR options.

## 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.

The screenshot illustrates the RingCentral Admin Portal interface for managing IVR menus. The top navigation bar includes the 'Admin Portal' dropdown and user information. The left sidebar shows the 'Phone System' tab selected, with 'Auto-Receptionist' as the active sub-tab. The main content area displays the 'IVR Menus' tab, featuring a search bar, a language dropdown, and a 'Validate Menu' button. A table lists existing IVR menus with columns for Name, Numbers, Ext., and Language. A '+ New IVR Menu' button is located in the top right of the table. A pop-up window titled 'Add IVR Menu' is open, showing fields for 'Extension Number' (1004) and 'Extension Name' (IVR Menu 1004), with 'Cancel' and 'Save' buttons at the bottom.

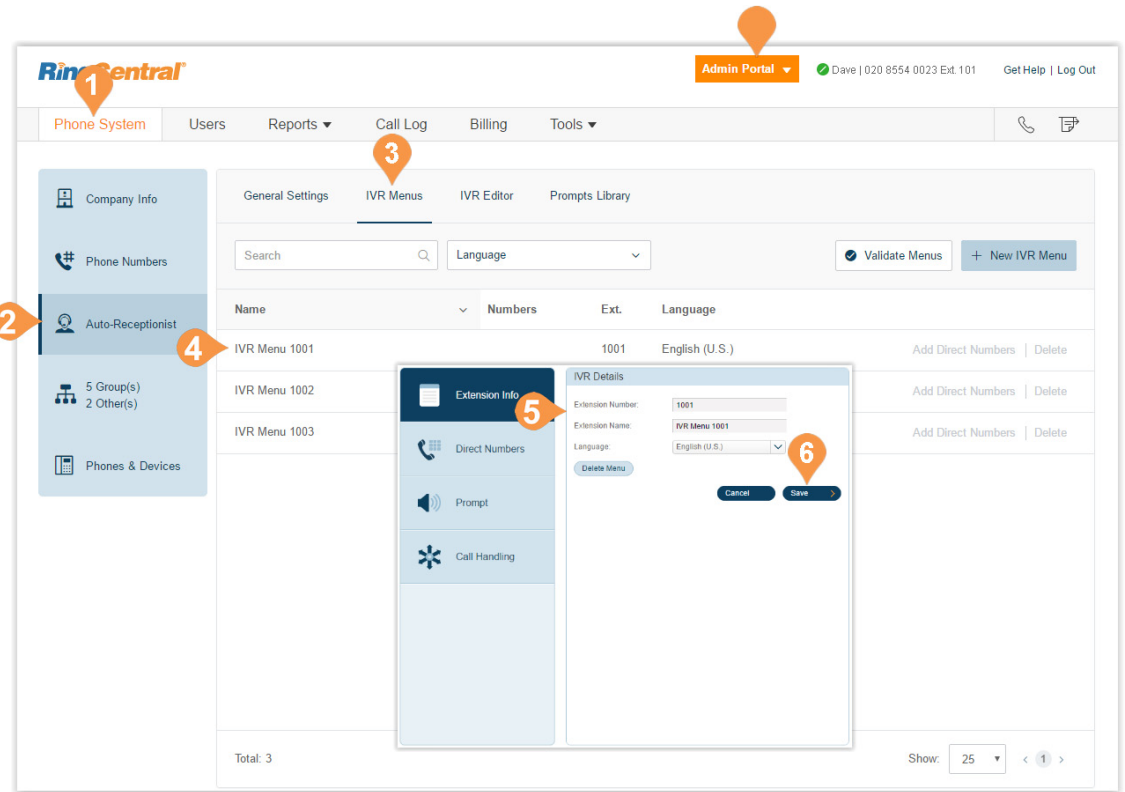
## Configure an IVR Menu

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 Menu**. 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**.

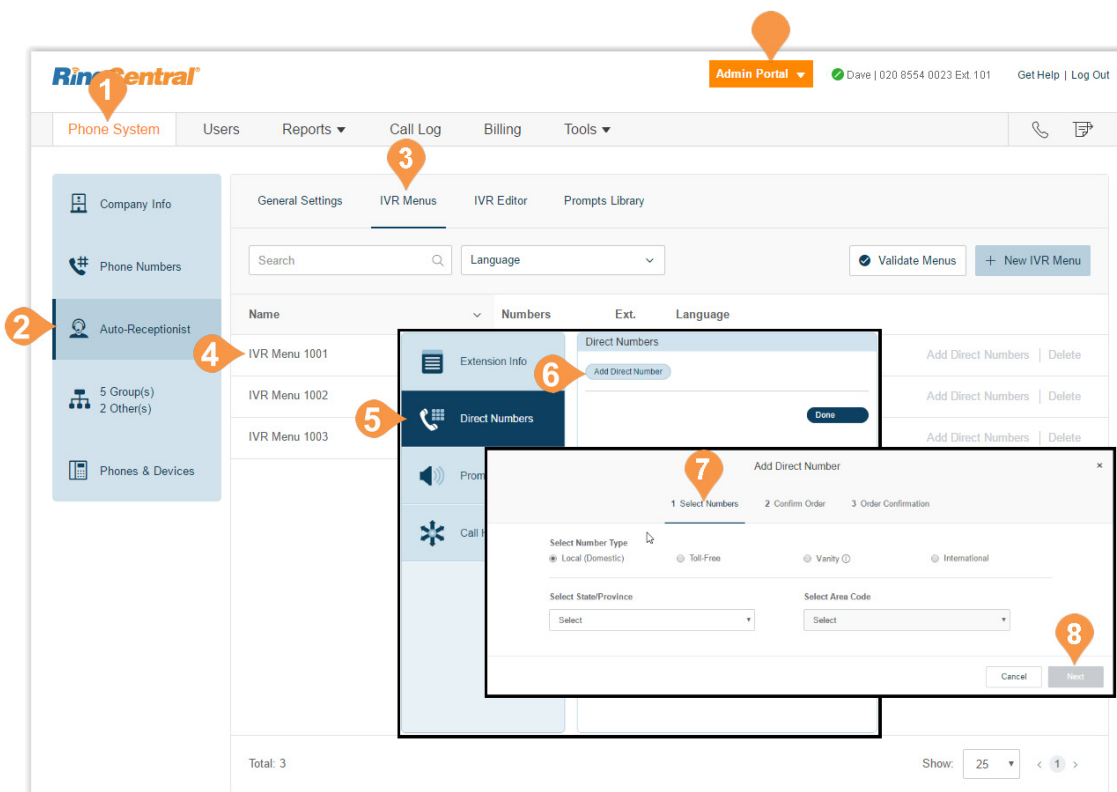


The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the 'Admin Portal' dropdown, user information 'Dave | 020 8554 0023 Ext. 101', and links for 'Get Help' and 'Log Out'. The main navigation tabs are 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Auto-Receptionist' option is selected in the sidebar. The 'IVR Menus' tab is chosen in the main content area. A table lists three IVR menus: 'IVR Menu 1001', 'IVR Menu 1002', and 'IVR Menu 1003'. The 'IVR Menu 1001' row is selected. A pop-up window titled 'Extension Info IVR Details' is open, showing the configuration for 'IVR Menu 1001'. The fields are: 'Extension Number' (1001), 'Extension Name' (IVR Menu 1001), and 'Language' (English (U.S.)). There is a 'Delete Menu' button and 'Cancel' and 'Save' buttons at the bottom of the pop-up.

## 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.



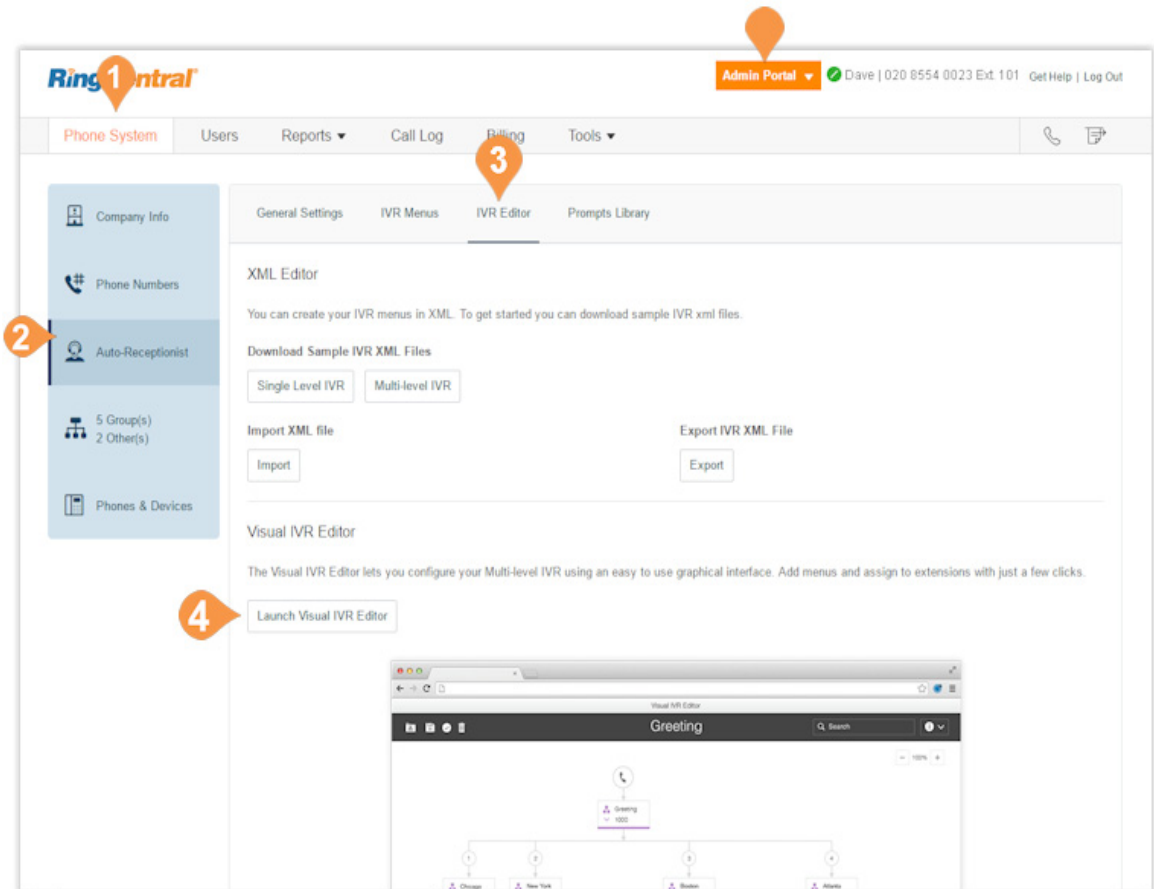


## Visual IVR Editor

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.

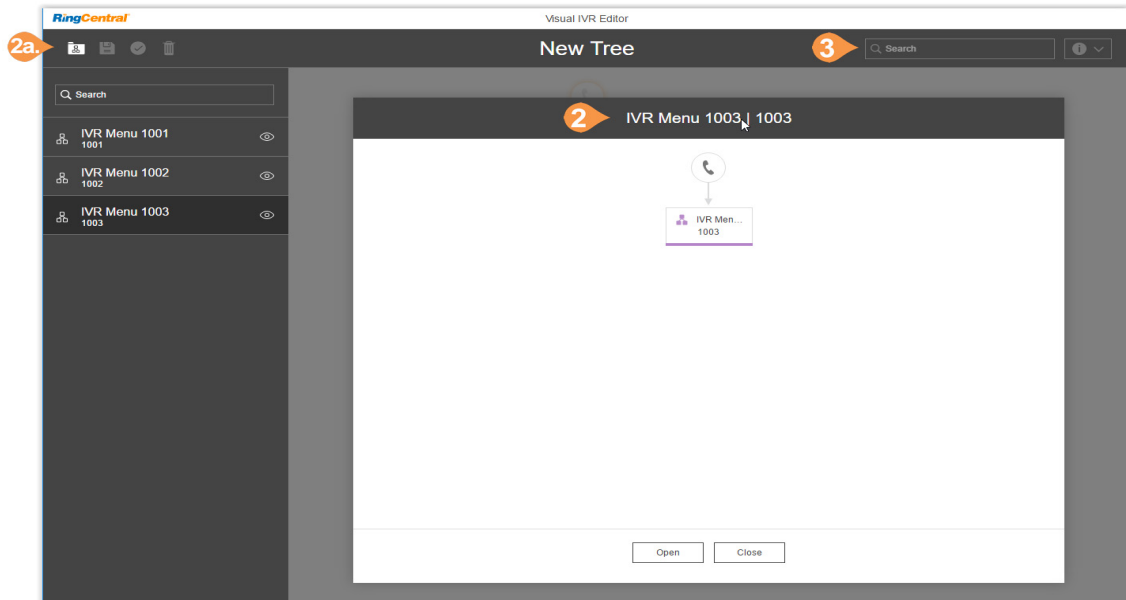


## Create a New IVR Menu or Open an Existing IVR Menu

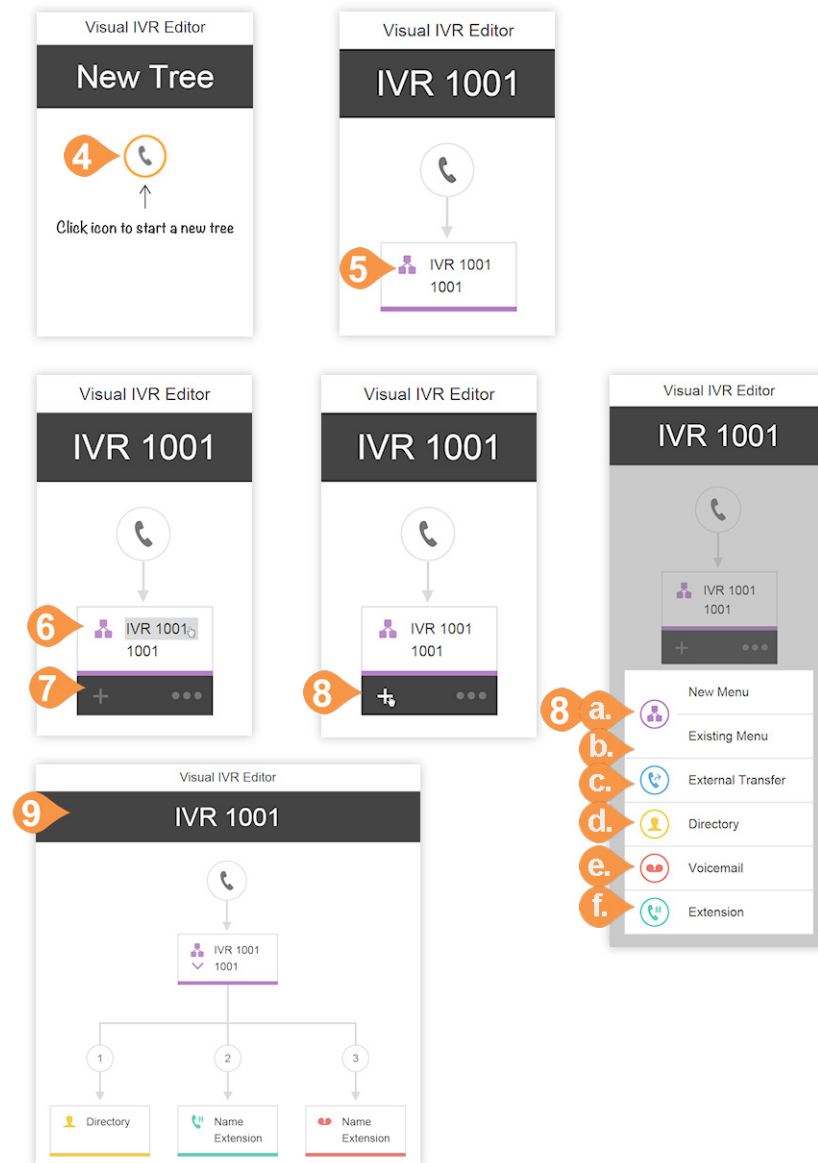
Use these steps to create a new IVR menu with the visual editor.

Open the Visual IVR Editor.

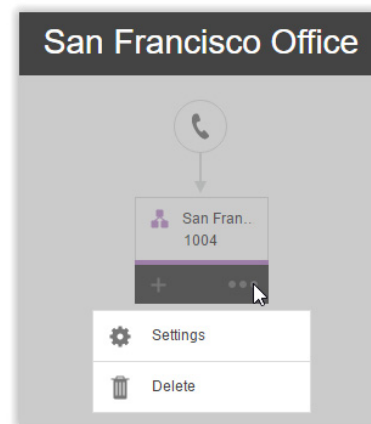
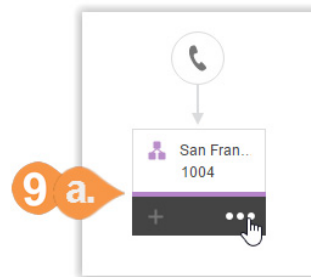
1. In the new tab, you will see your **Visual IVR Editor**. On this page, you will have a **New Tree** waiting to be created. You have the option to create a new IVR from this screen, or open an existing IVR and edit it in the Visual IVR Editor.
  - a. In the upper-left corner of the screen you have 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.



**Menu Settings**

San Francisco Office

1004

Select Language:

English (U.S.)

Use Text to Speech:

Select Prompt File

Generic Key Presses

Use Default Settings:

Press #:

Repeat menu greeting

Press \*:

Return to previous menu

If caller enters no action after the prompt played 3 times:

Call will disconnect

Cancel Save

**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**

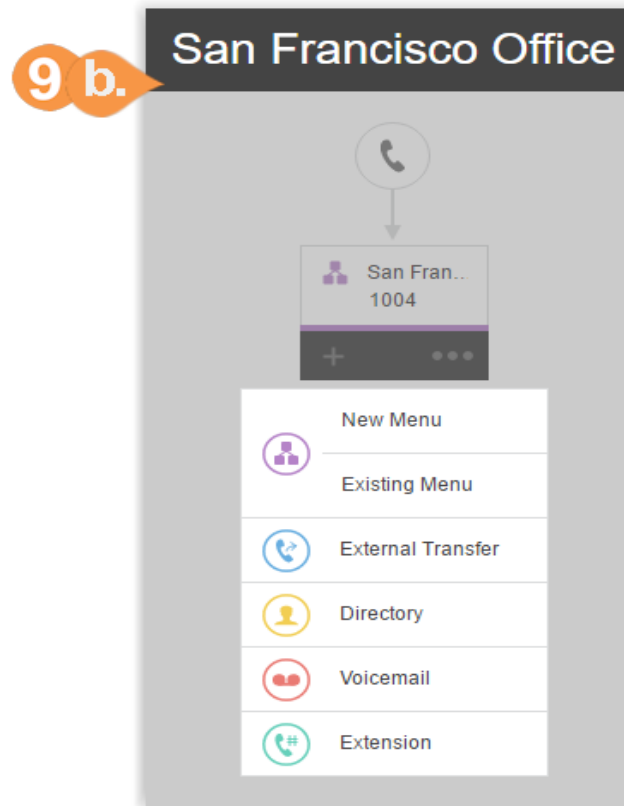
- No further configuration is needed.
- Click the trash can icon to delete this item.

**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.

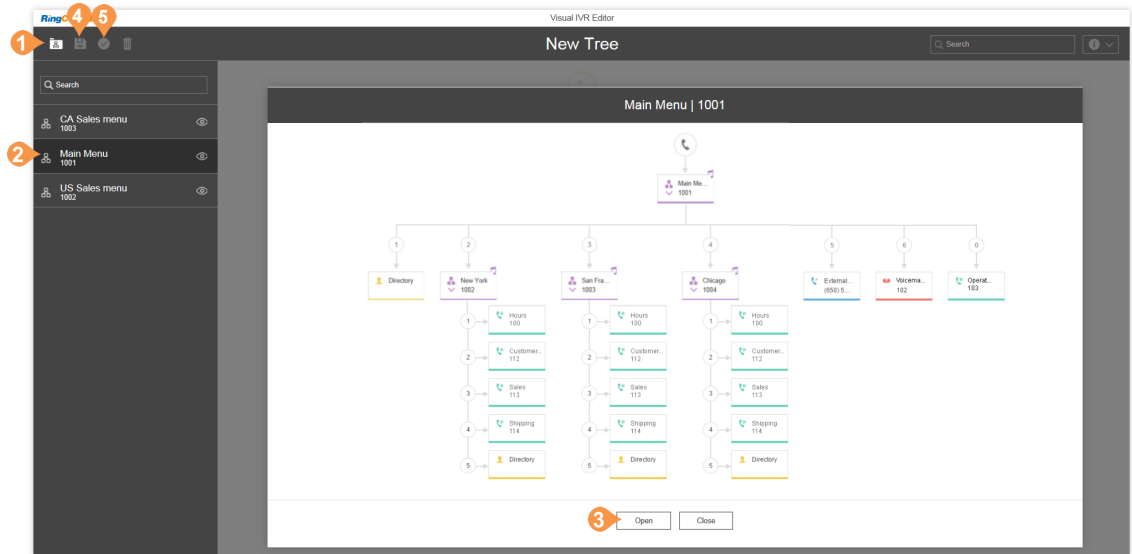
**j. Extension**

- 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.

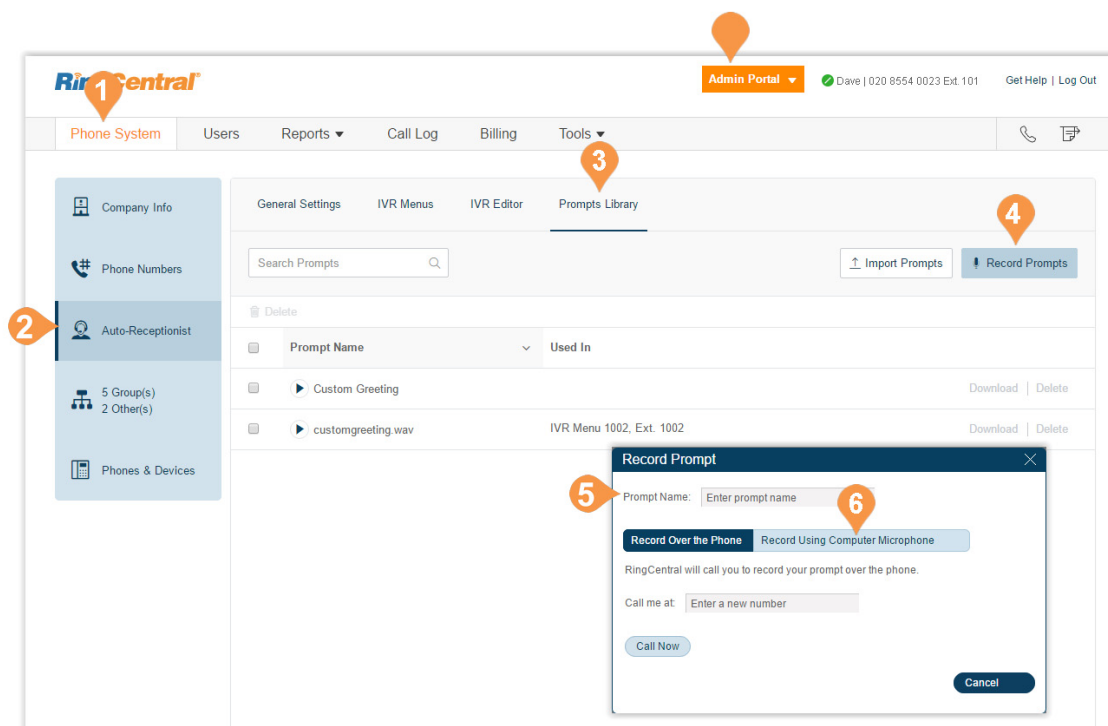
**Note:** An IVR menu can function independently from the Auto-Receptionist, so it does not have to be set up for an Auto-Receptionist greeting.

### 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.

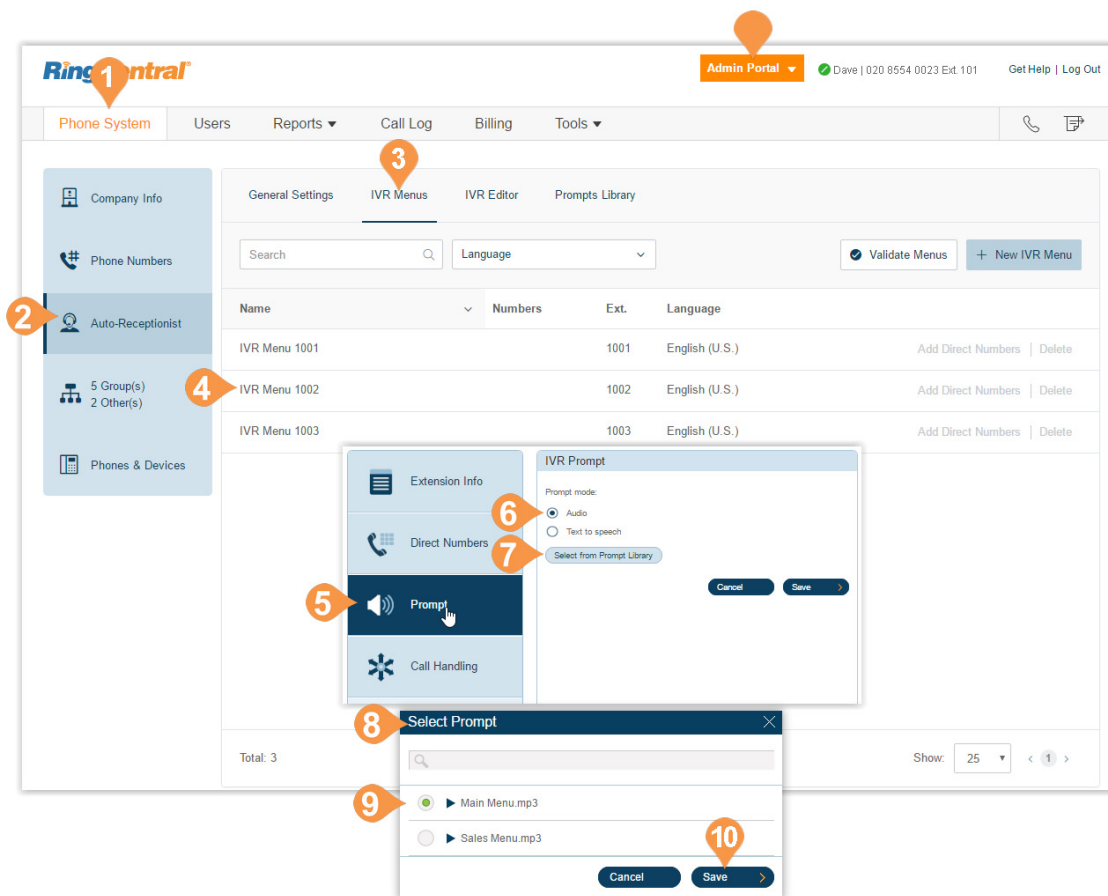


## Select Prompt Mode: Audio

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.



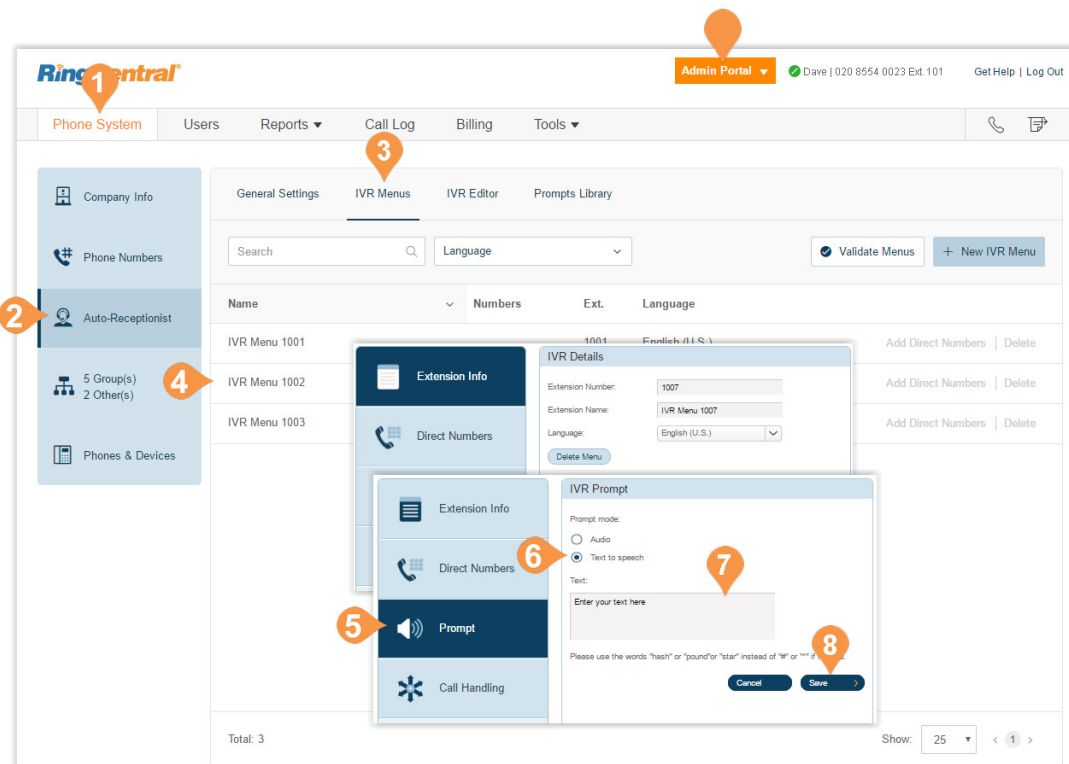


## Select Prompt Mode: Text-to-Speech

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

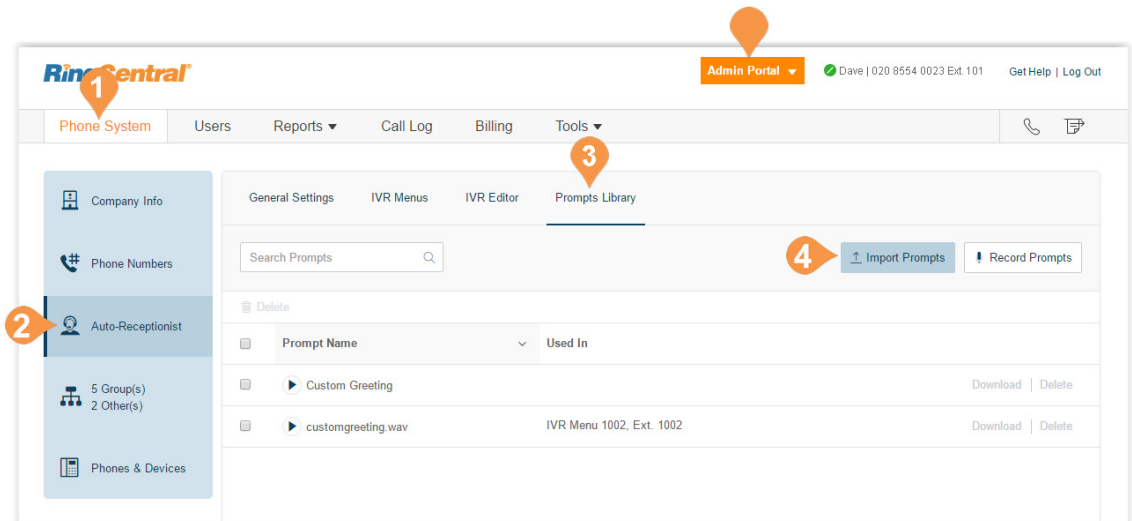
Several tasks require admins to record messages or greetings for your RingCentral system. These steps explain how to do the following:

- 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:

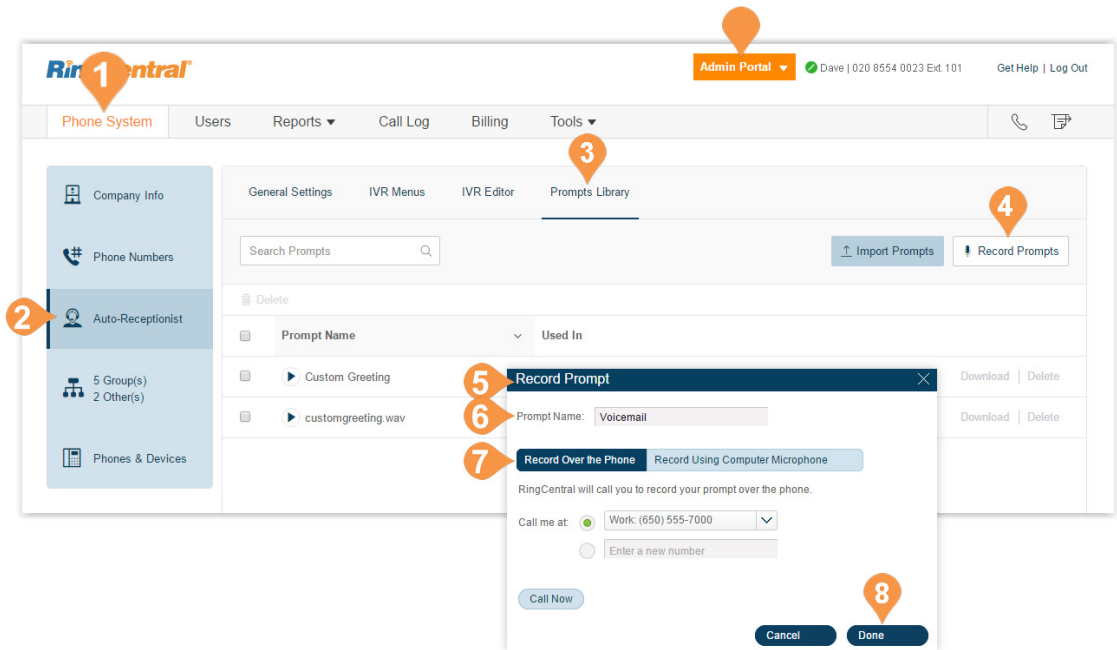
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **Prompts Library** tab.
4. Click the **Import Prompts** button.
5. A browser appears.
6. Navigate to the prompt file location.
7. Select the file and click **Open**.



## 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.

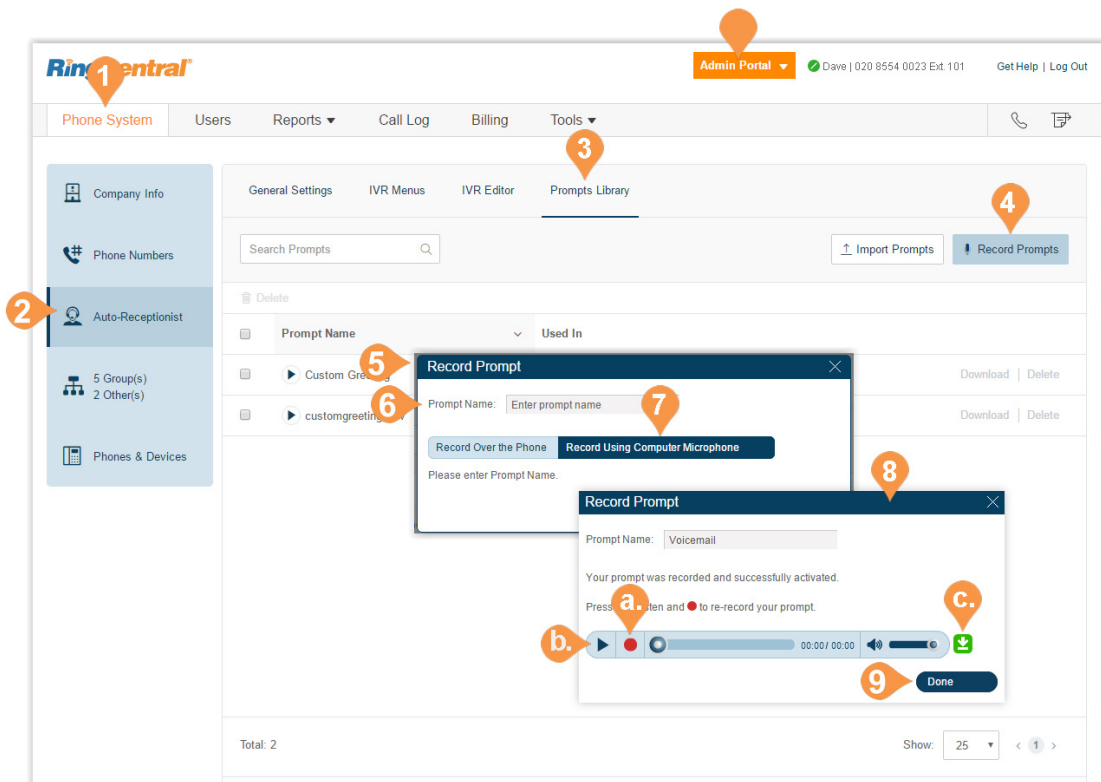
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. The **Record Prompt** pop-up appears.
6. Enter a name in the text field next to **Prompt Name**.
7. Click **Record Over the Phone**.
  - Next to **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**.

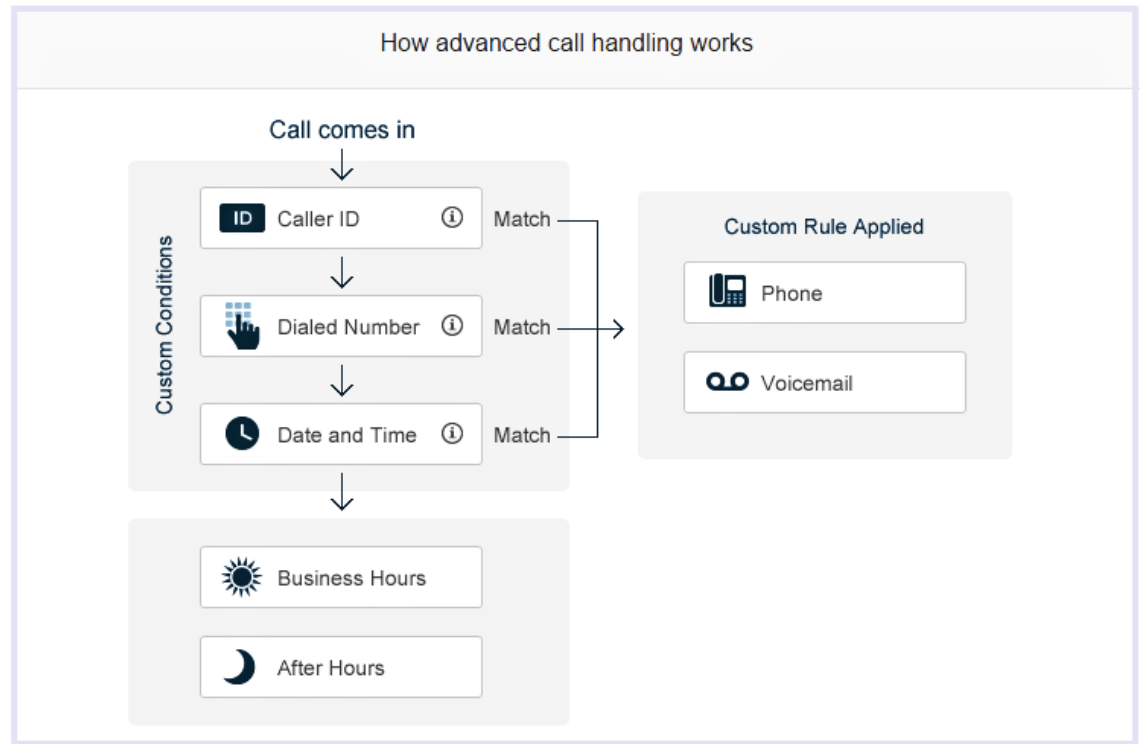


## Custom Rules

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.

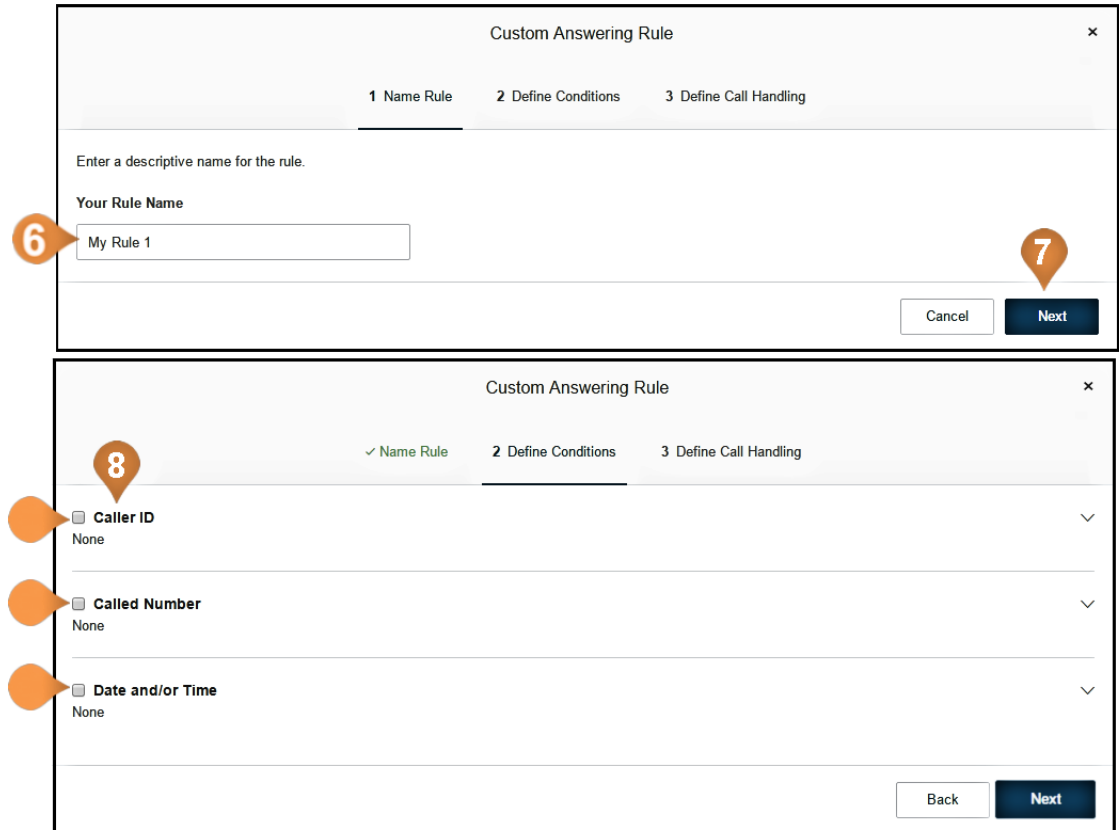
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Under the **General Settings** tab, click **IVR Settings**.
4. Under **Custom Answering Rules**, click **Custom Rule**.
5. Click **Add Rule**. The **Custom Answering Rule** pop-up appears.

Instructions continue on the following pages.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' header shows the user 'Dave' with contact information '020 8554 0023 Ext. 101' and links for 'Get Help' and 'Log Out'. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist' (highlighted with an orange circle 2), '0 Group(s) 0 Other(s)', and 'Phones & Devices'. The 'Auto-Receptionist' section is expanded, showing 'General Settings', 'IVR Menus', 'IVR Editor', and 'Prompts Library'. The 'General Settings' tab is active, displaying 'Company Hours' (set to 24 hours) and 'IVR Settings'. Under 'IVR Settings', there are sections for 'Company Greeting' (with a play button and a timer at 00:00 / 00:00), 'Company Hours Greeting' (with a play button and a timer at 00:00 / 00:00), and 'After Hours Greeting'. An 'Edit' button is visible. Below these is the 'Custom Answering Rules' section, which includes a description: 'You can create custom rules for special routing during holidays, specific time of the day (e.g. lunch break) or for special callers.' An orange circle 4 highlights the 'Custom Rule' button. A pop-up window titled 'Custom Answering Rule' is shown at the bottom, containing a description of multi-condition advanced call handling rules and an 'Add Rule' button, which is highlighted with an orange circle 5.

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 Answering Rule** [x]

1 Name Rule    2 Define Conditions    3 Define Call Handling

Enter a descriptive name for the rule.

Your Rule Name

My Rule 1

Cancel    **Next**

---

**Custom Answering Rule** [x]

✓ Name Rule    2 Define Conditions    3 Define Call Handling

**8** ☐ **Caller ID** None [v]

☐ **Called Number** None [v]

☐ **Date and/or Time** None [v]

Back    **Next**

## 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 70, 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 76.

Custom Answering Rule

✓ Name Rule

2 Define Conditions

3 Define Call Handling

1

☒ **Caller ID**

Caller ID rules apply to calls coming from specific phone numbers. You can create a list of phone numbers to be used for this setting. (Numbers selected must be using Caller ID.)  
When I receive calls from callers specified below.

Type Phone Number or Contact Name ⓘ  

020 8554 0023

Add

☐ **Called Number**

None

☐ **Date and/or Time**

None

Back

Next



### 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 76.

The image displays two screenshots from the RingCentral Admin interface, illustrating the steps to configure a 'Called Number' condition for a custom answering rule.

**Top Screenshot: Custom Answering Rule**

This screenshot shows the 'Custom Answering Rule' configuration window. The 'Define Conditions' tab is active. The 'Caller ID' is set to 'None'. The 'Called Number' condition is selected, and the 'When Selected Company Number(s) is Called:' field is highlighted with a 'Select Number' button. The 'Date and/or Time' condition is also set to 'None'. The 'Next' button is visible at the bottom right.

**Bottom Screenshot: Select Number**

This screenshot shows the 'Select Number' pop-up window. It features a search bar and a table with columns for 'Phone Number' and 'Name'. A single entry is listed: '020 8554 0023'. The 'Total: 1' is displayed at the bottom left. The 'Show: 10' dropdown and pagination controls are at the bottom center. The 'Save' button is at the bottom right.

### 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 rule Should be Active.**
3. Click **Next**. Go to “Custom Rule Call Handling Definitions” on page 76.

Custom Answering Rule

✓ Name Rule

2 Define Conditions

3 Define Call Handling

☐ Caller ID

None

∨

☐ Called Number

None

∨

1 ☒ Date and/or Time

∧

Date and/or Time rules apply based on a time of the day and week every week, or on a specific date range.

2 Select When This Rule Should be Active: ⓘ

☒ Weekly Schedule

☐ Specific Date Range

☐ Sunday

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

3

Back

Next

## 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

✓ Name Rule ✓ Define Conditions 3 Define Call Handling

Select Action to Take When Incoming Calls Match This Rule:

☒ Play company greeting ☐ Bypass greeting to go to extension

Set Greeting

Default

View In ⓘ

English (U.S.)

"Thank you for calling RingCentral. If you know your party's extension you may dial it at any time. For the Operator press 0. For the Dial-By-Name directory press 9."

00:00 / 00:00

If Caller Enters no Action

☐ Connect to operator ⓘ ☒ Disconnect ⓘ

Back Done

### Custom Answering Rule List

All created custom answering rules are listed when you follow these steps, as shown in “Custom Rules” on page 70:

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 80](#).

**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 91](#).

**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 94](#).

**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 105](#).

**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 109](#).

**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 112](#).

**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 120](#).

**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**.

The screenshot illustrates the process of adding a call queue group in the RingCentral Admin Portal. The interface includes a top navigation bar with the 'Admin Portal' dropdown and user information. A left sidebar contains navigation options like 'Company Info', 'Phone Numbers', and 'Auto-Receptionist'. The main content area shows the 'Call Queues' tab with a table of existing queues and a '+ New Call Queue' button. A modal window titled 'Add Call Queue' is open, showing fields for 'Extension Name', 'Extension Number', and 'Manager's Email'. Below the modal, a 'Select Users' step is shown with a search bar and a list of users. The 'Done' button is highlighted at the bottom right.

**Call Queues Table:**

Status	Name	Numbers	Ext.	Msg.	Members Availability
●	IT Helpdesk	10	0 / 0	1 / 0	Expand   Resend Invitation   Delete
●	Marketing Call Queue	9	0 / 0	1 / 0	Expand   Resend Invitation   Delete

**Add Call Queue Form:**

Extension Name:

Extension Number:

Manager's Email:

**Select Users Step:**

Select the members of the department, then click Done > Activate the Call Queue.

Search:  Department:

Show All | Show Selected (2)

Name	Ext.	Department
DH Test PDS	102	
<input checked="" type="checkbox"/> Joe Stephens	103	Purchasing
<input checked="" type="checkbox"/> Matthew Smith	104	Purchasing
<input type="checkbox"/> Something1234 New4321	101	

Total: 4 < 1 > Back 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**.

The screenshot illustrates the steps to configure a call queue in the RingCentral Admin Portal. The interface shows the 'Phone System' tab selected in the sidebar, with the 'Call Queues' tab active in the main content area. A table lists existing call queues, including 'IT Helpdesk', 'Marketing Call Queue', 'Quality Control Call Queue', and 'Sales Call Queue'. An 'Info' pop-up is displayed for the 'IT Helpdesk' queue, showing various configuration fields such as Extension Number, Group Name, Record Call Queue Name, Company Name, Contact Phone, Manager Email, Address, Call Queue Hours, Call Queue Members, Overflow Call Queues, Regional Settings, Resend Welcome Email, and Status. The 'Save' button is highlighted in the bottom right corner of the pop-up.

## 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

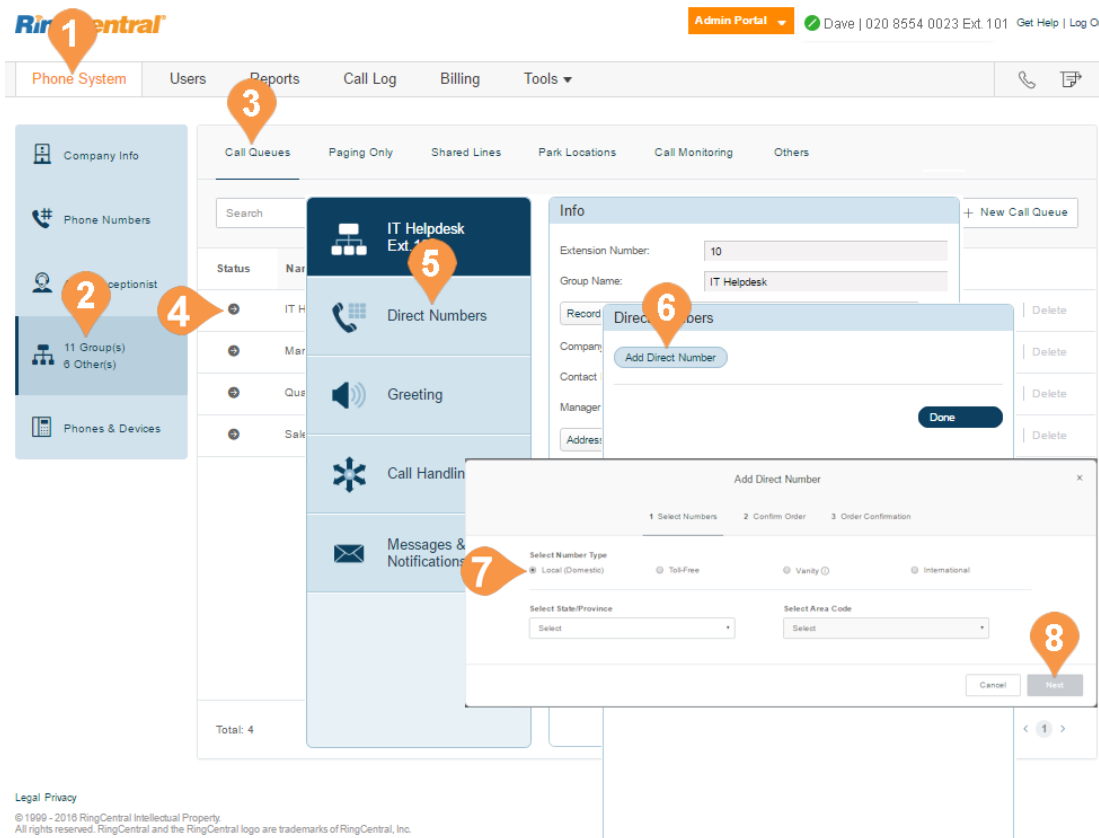
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing call queue group. The call queue group must be configured with either a *Rotating* or *In Fixed Order* call handling protocol. See “Incoming Call Handling” on page 86.
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.

The screenshot illustrates the configuration process for overflow call queues in the RingCentral Admin Portal. It shows the navigation from the Phone System tab to the Call Queues section, selecting a specific queue, and then configuring its overflow settings. The 'Overflow Call Queues' pop-up is the central focus, where users can enable overflow and select additional queues to add to the overflow list. The interface includes various filters and search options for managing these queues.

## 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.



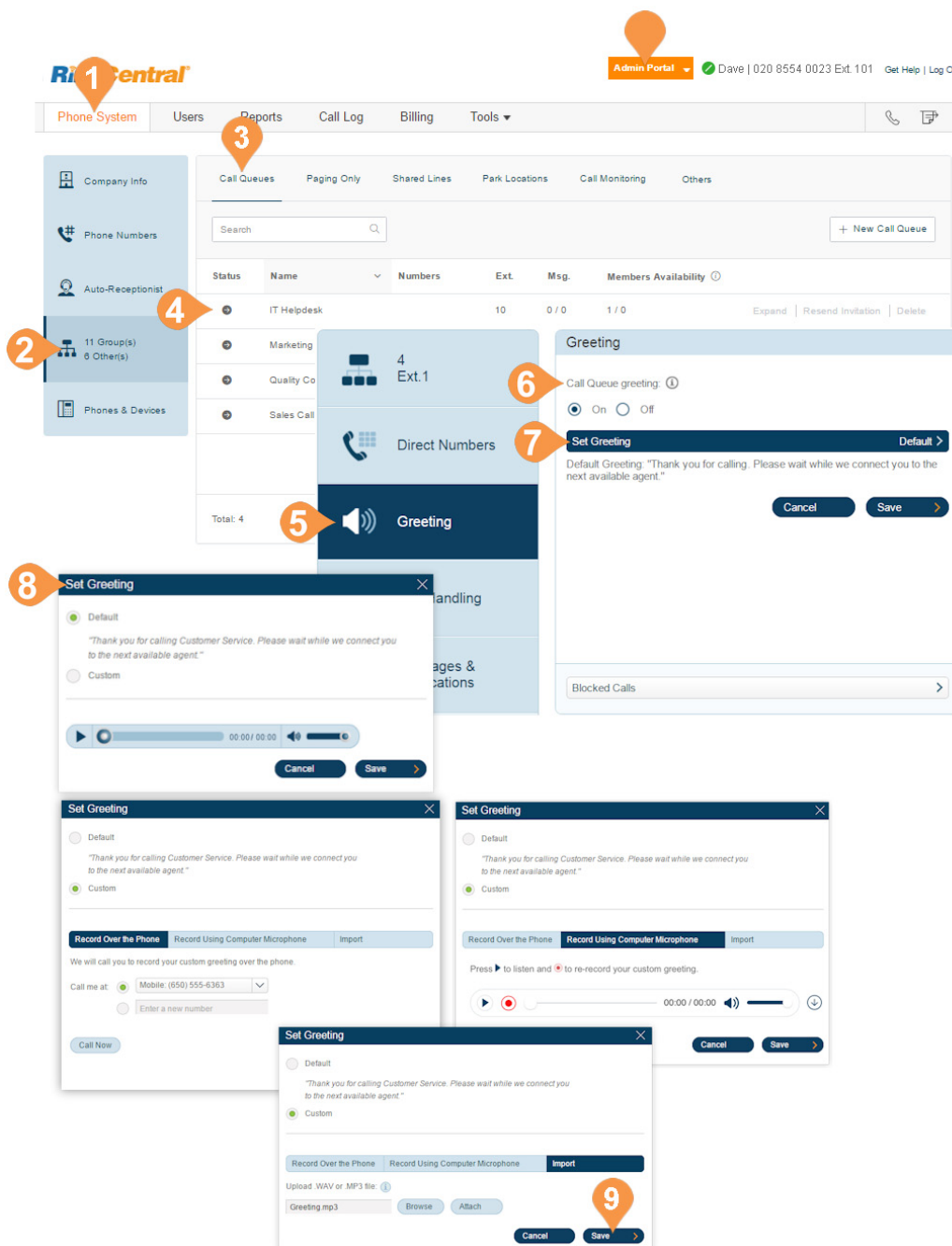
## Call Queue Greetings

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**.

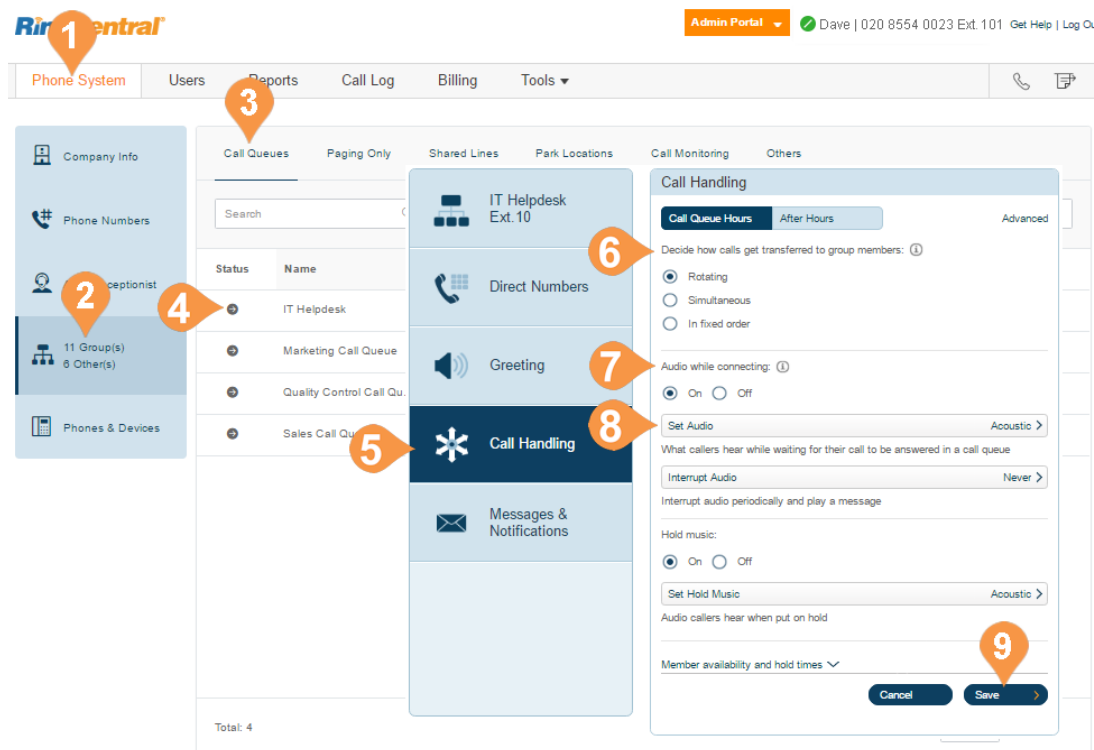


## Incoming Call Handling

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.



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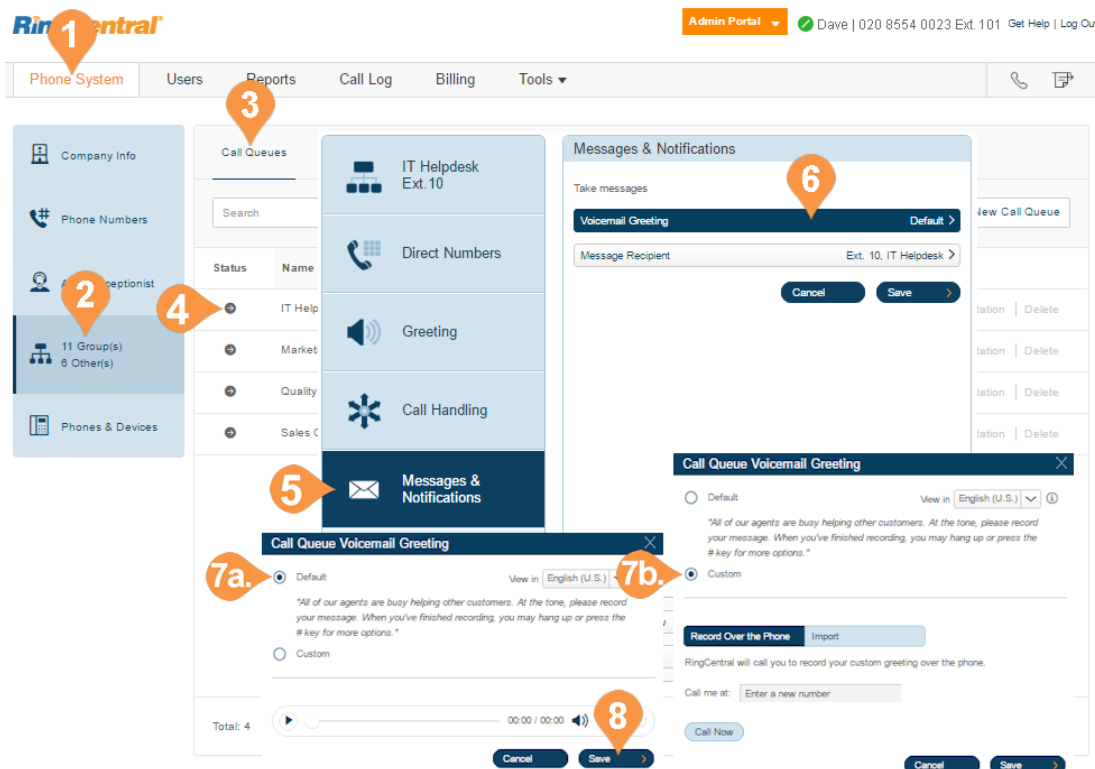
## Messages and Notifications

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**.

The screenshot illustrates the process of setting a message recipient for a call queue in the RingCentral Admin Portal. The interface includes a top navigation bar with the 'Phone System' tab selected. A sidebar on the left contains a 'Groups' section with a 'Call Queues' tab highlighted. A central panel displays a list of call queues, with 'IT Helpdesk' selected. A right-hand panel shows the 'Messages & Notifications' settings for the selected queue, where the 'Message Recipient' is set to 'Ext. 10, IT Helpdesk'. A pop-up window titled 'Select Message Recipient' is open, showing a list of potential recipients with checkboxes for selection. The 'Done' button in the pop-up is highlighted.

**Admin Portal** | Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out

**Phone System** | Users | Reports | Call Log | Billing | Tools

**Groups** | Call Queues | Payroll

Search

Status | Name

IT Helpdesk

Marketing C

Quality Con

Sales Call C

**Messages & Notifications**

Take messages

Voicemail Greeting | Default

**Message Recipient** | Ext. 10, IT Helpdesk

Cancel | Save

**Select Message Recipient**

Search | All Extensions

Select	Name	Ext.	Type	Department
<input type="checkbox"/>	Fax Group 1	3	Message-Only Extension	
<input type="checkbox"/>	Holiday	15	Message-Only Extension	
<input type="checkbox"/>	John Smith	1002	User	
<input type="checkbox"/>	Sandra Brown	101	User	
<input type="checkbox"/>	Shared Line - message only	17	Message-Only Extension	
<input type="checkbox"/>	shared line 1	8	Shared Lines	
<input checked="" type="checkbox"/>	This call queue	10	Call Queue	

Total: 7 | Show: 10 | Cancel | Done

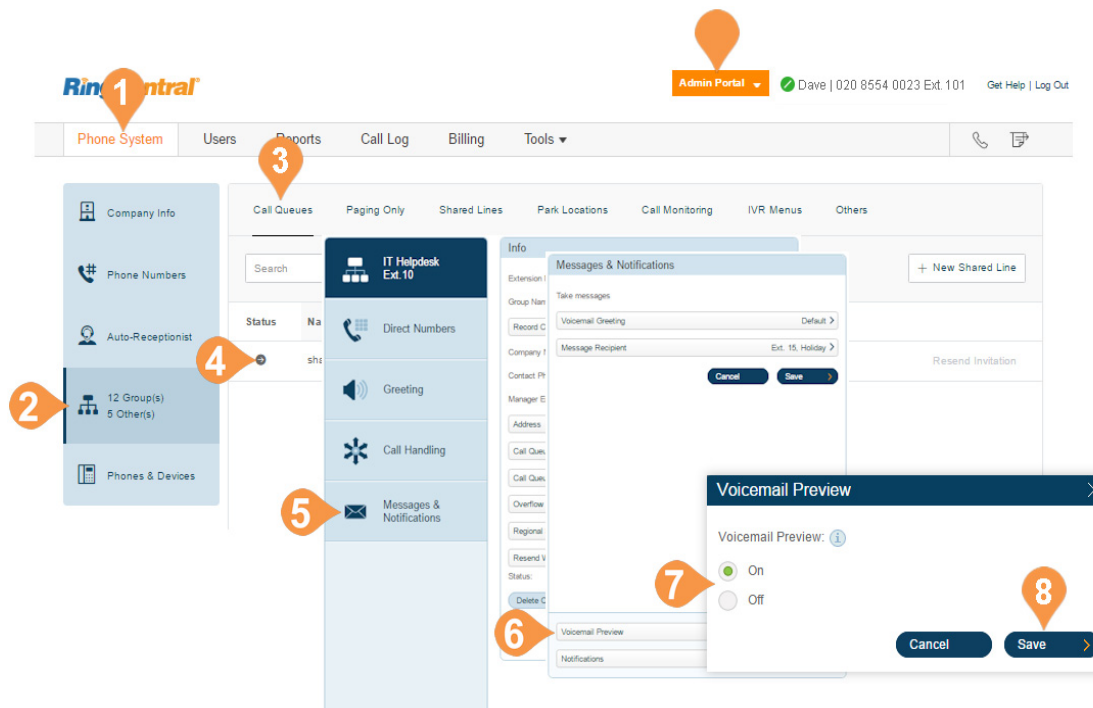
Total: 4 | Show: 25

## 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.

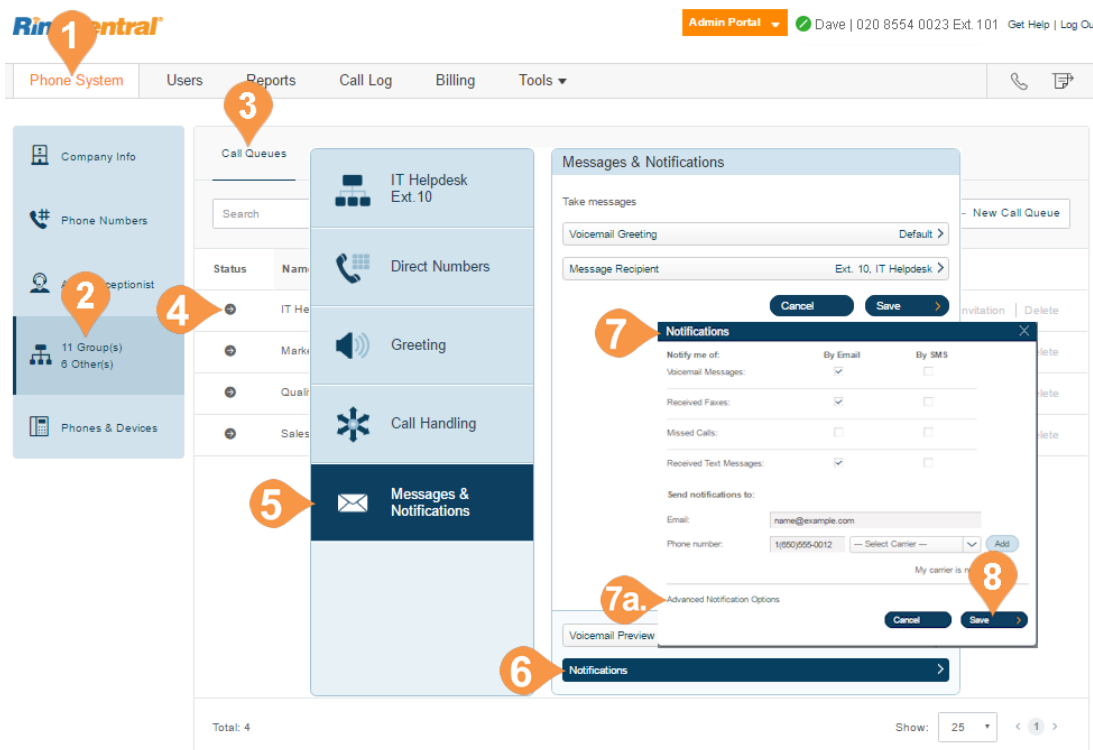




## Notifications

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

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is selected. In the left sidebar, 'Groups' is highlighted. The 'Paging Only' sub-tab is selected in the main content area. A table lists existing paging groups: 'Paging Only 1' (Cisco SPA-303 Desk Phone, Ext. 5) and 'Support' (Ext. 1). A '+ New Paging Only' button is in the top right. Below the table is a form titled 'Add Paging Group' with fields for 'Group Name' and 'Extension Number'. The 'Save' button is at the bottom right.

Status	Name	Devices	Ext.	
✓	Paging Only 1	Cisco SPA-303 Desk Phone	5	Disable
✓	Support		1	Disable

Total: 2

Cancel Save Show: 25 < 1 >

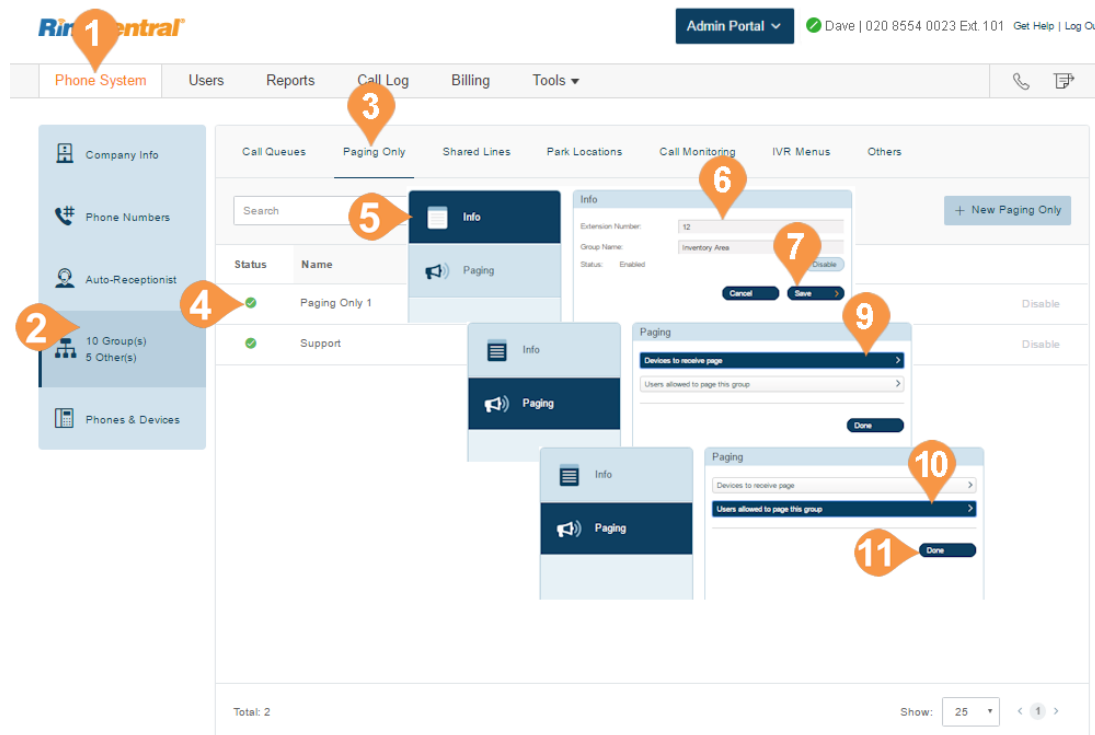
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## Configure a Paging Only Group .

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 92.

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**



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## 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

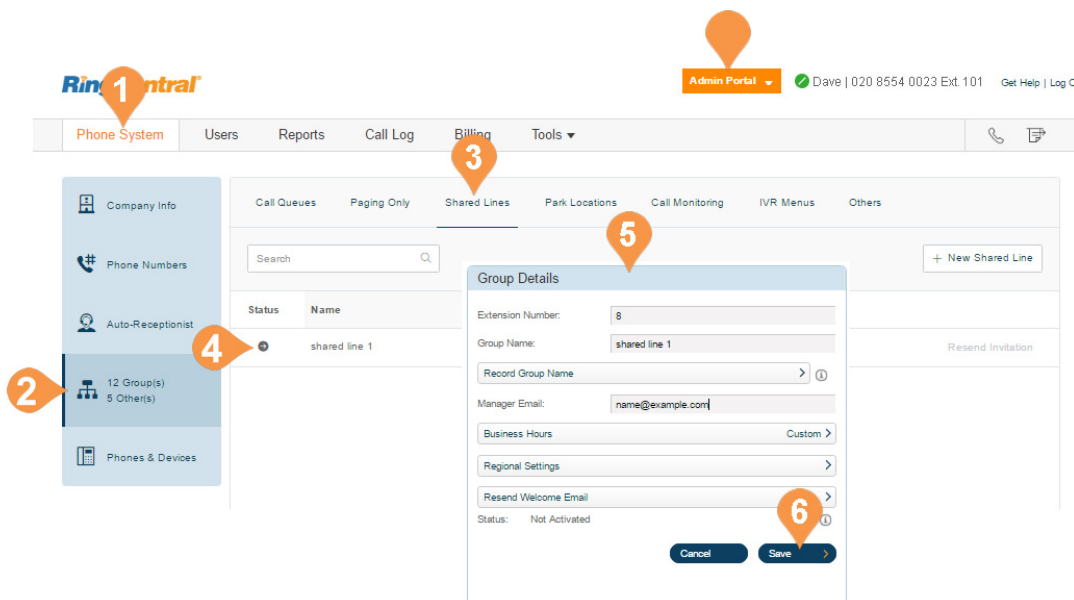
1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Click **New Shared Line**.  
The **Add Shared Line** pop-up appears.
5. Select a location: **Domestic** or **International**.
6. Enter the **Group Name**, **Manager's Email**, and **Extension**.
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**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' tab is selected, showing user information (Dave | 020 8554 0023 Ext. 101) and links for 'Get Help' and 'Log Out'. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Shared Lines' sub-tab is selected. A sidebar on the left contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '12 Group(s) 5 Other(s)', and 'Phones & Devices'. The 'Shared Lines' section shows a table with columns for Status, Name, Numbers, Ext., and Messages. A '+ New Shared Line' button is located in the top right of this section. A pop-up window titled 'Add Shared Line' is open, showing a progress bar with steps 1 through 6. The 'Add Lines' step (2) is currently active, displaying a 'Select a Location' section with radio buttons for 'Domestic' (selected) and 'International'. To the right, under 'Group Details', there are input fields for 'Group Name', 'Manager's Email', and 'Extension'. A 'Next' button is located at the bottom right of the pop-up.

## 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.

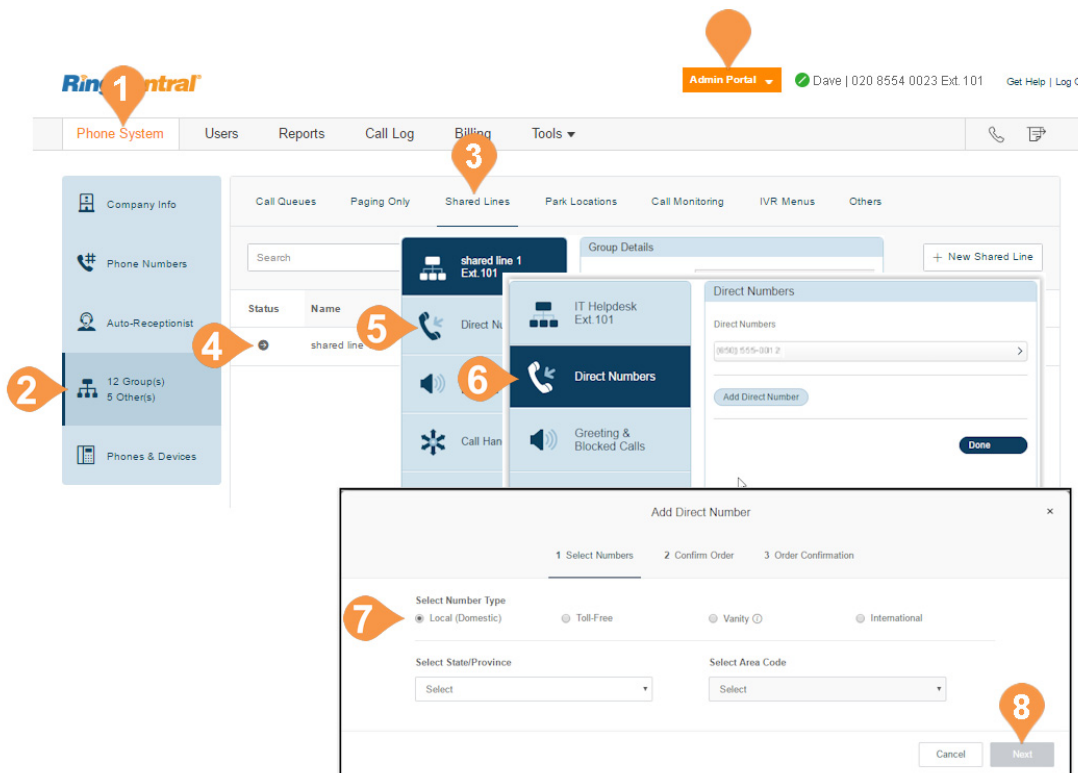
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select a Shared Line from the list. See page 95 for instructions on how to create a Shared Line.
5. Edit the **Group Details** information:
  - a. **Extension Number**
  - b. **Group 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**. 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.





## 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.

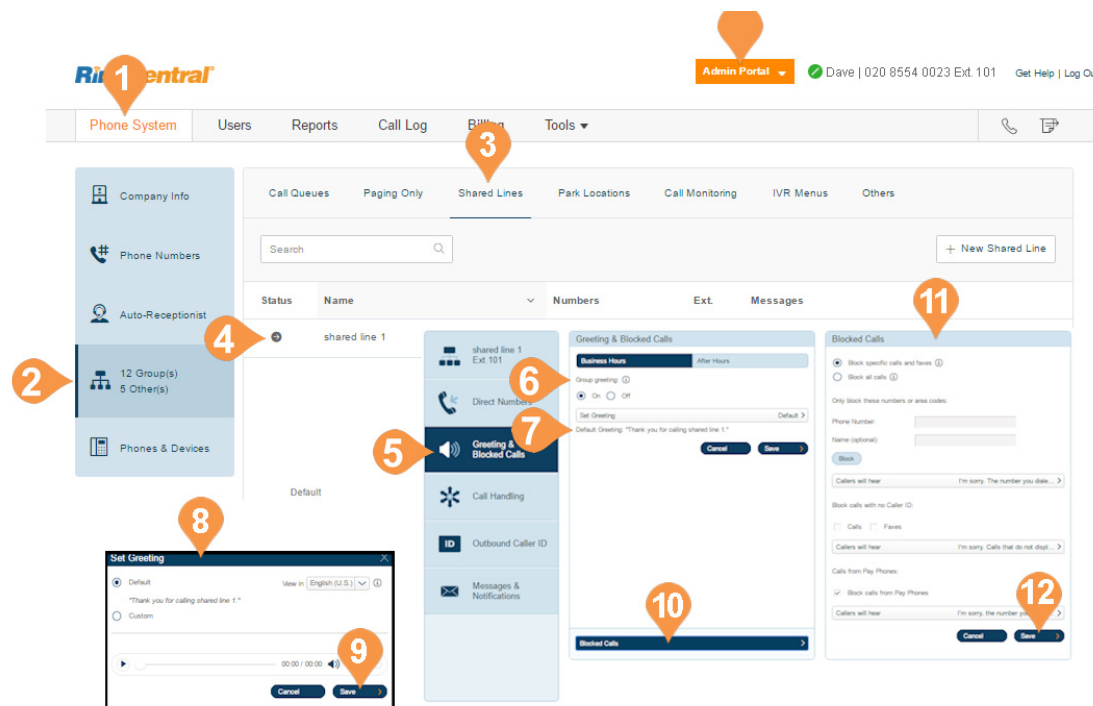
- **Record Using Computer Microphone**

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**.

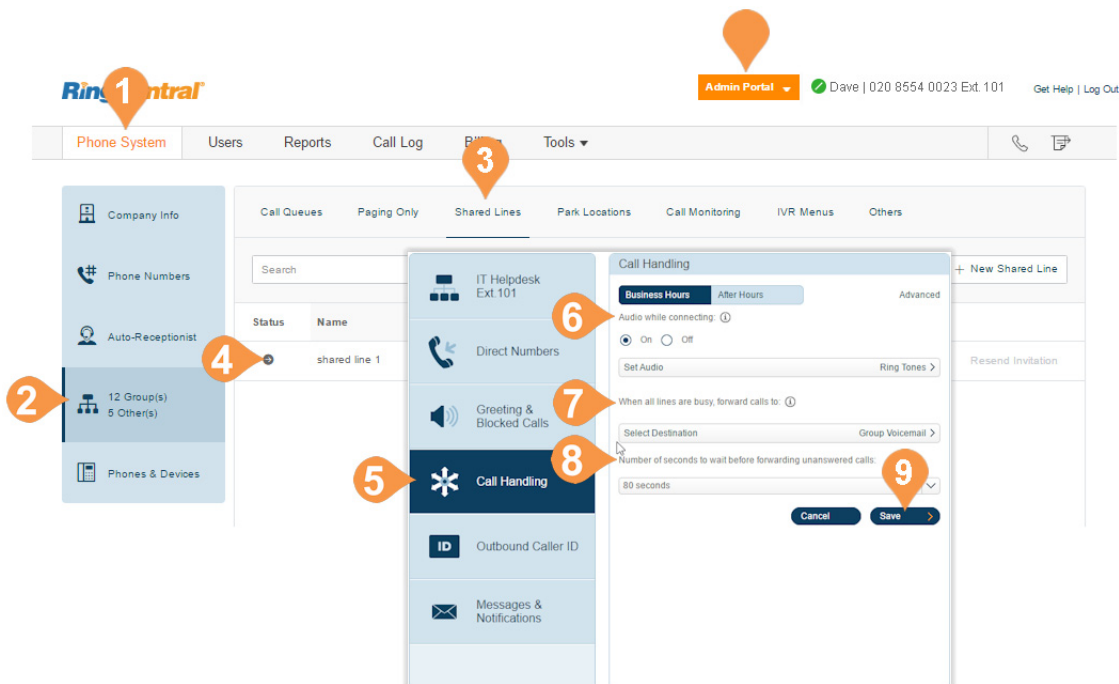
9. Click **Save**.
10. Click **Blocked Calls**.
11. Set your preferences for **Blocked Calls**.
12. Click **Save**.



## 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.

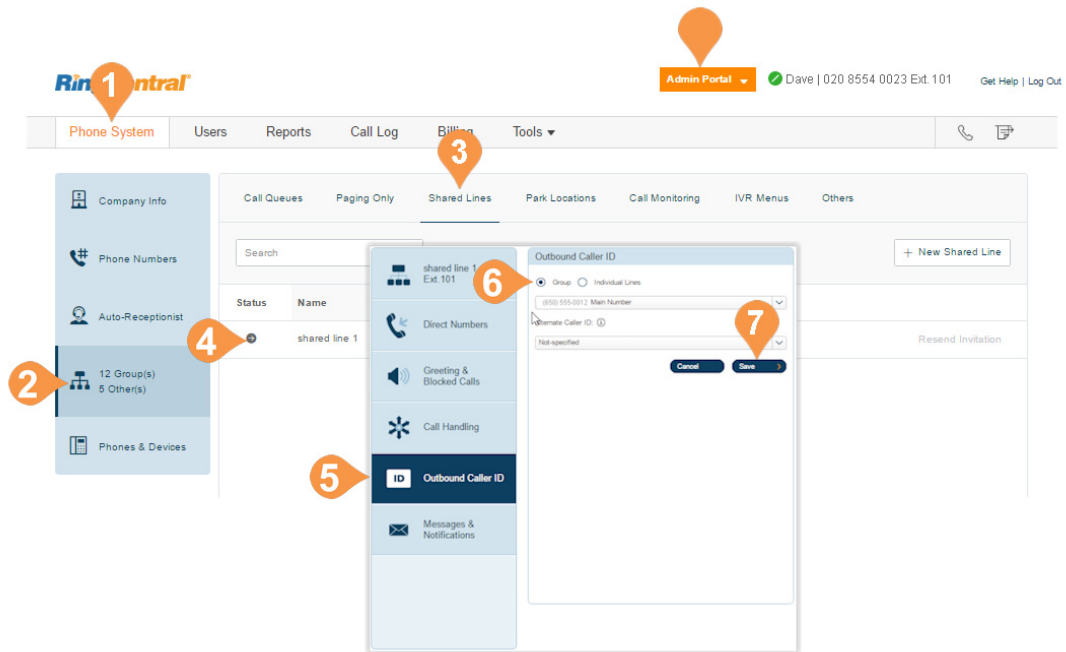
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Select the **Shared Lines** tab.
4. Select an existing **Shared Lines** group
5. Click **Call Handling**.
6. Under **Audio while connecting**, select the button next to **On** and click **Set Audio**.
  - a. Choose 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**.

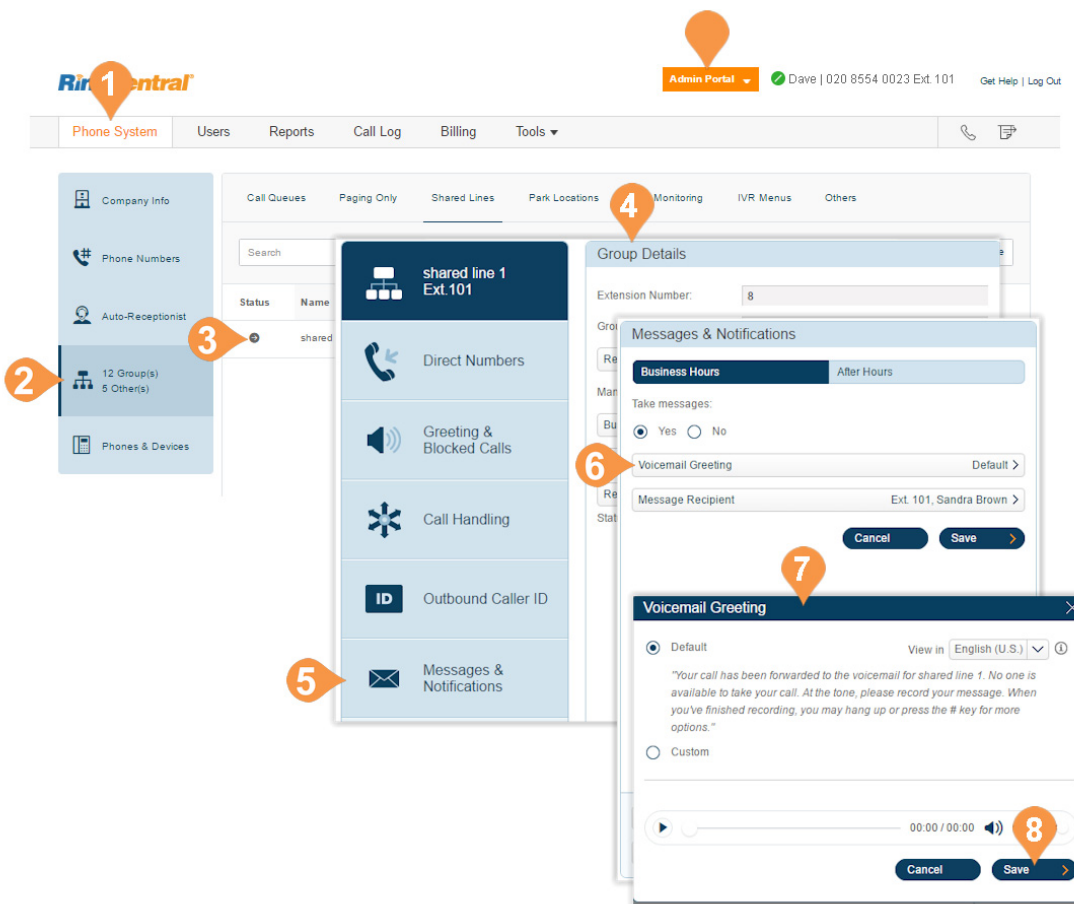


## Messages & Notifications

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**.

The screenshot illustrates the steps to set a message recipient for a Shared Line in the RingCentral Admin Portal. The interface includes a top navigation bar with 'Admin Portal' and user information. A left sidebar contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '12 Group(s) 5 Other(s)', and 'Phones & Devices'. The main content area has tabs for 'Call Queues', 'Paging Only', 'Shared Lines', 'Park Locations', 'Call Monitoring', 'IVR Menus', and 'Others'. The 'Shared Lines' tab is active, showing a list of shared lines. A 'Messages & Notifications' pop-up is open, showing options for 'Business Hours' and 'After Hours'. The 'Take messages' section has 'Yes' selected. The 'Message Recipient' field is set to 'Ext 101, Sandra Brown'. A 'Select Message Recipient' pop-up is also shown, displaying a table of available recipients.

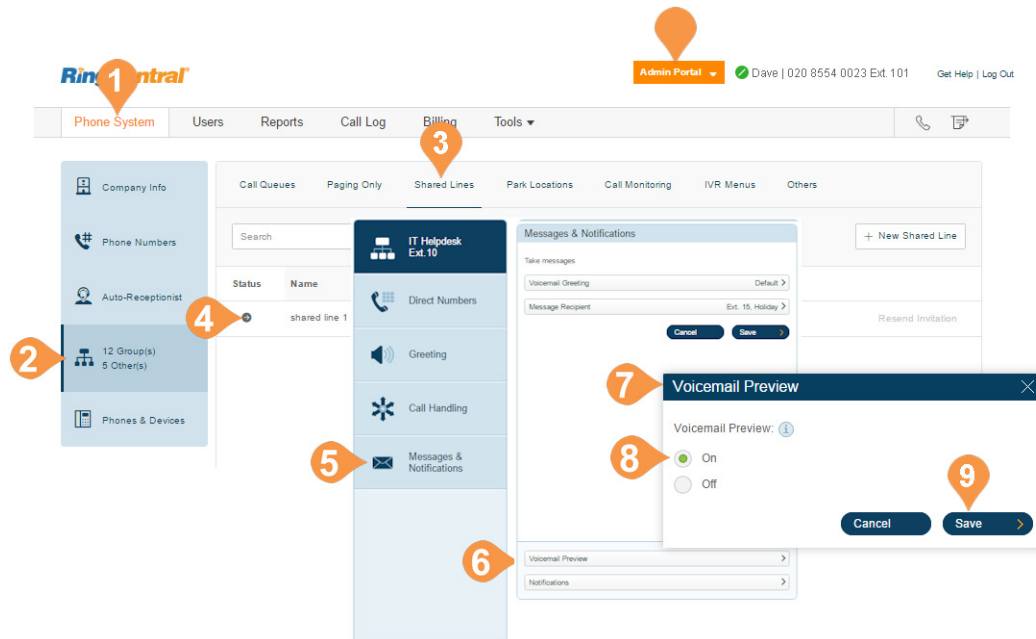
Select	Name	Ext.	Type	Department
<input type="radio"/>	Fax Group 1	3	Message-Only Extension	
<input type="radio"/>	Holiday	15	Message-Only Extension	
<input type="radio"/>	John Smith	1002	User	
<input checked="" type="radio"/>	Sandra Brown	101	User	
<input type="radio"/>	Shared Line - message only	17	Message-Only Extension	
<input type="radio"/>	This extension	8	Shared Lines	

## 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**.

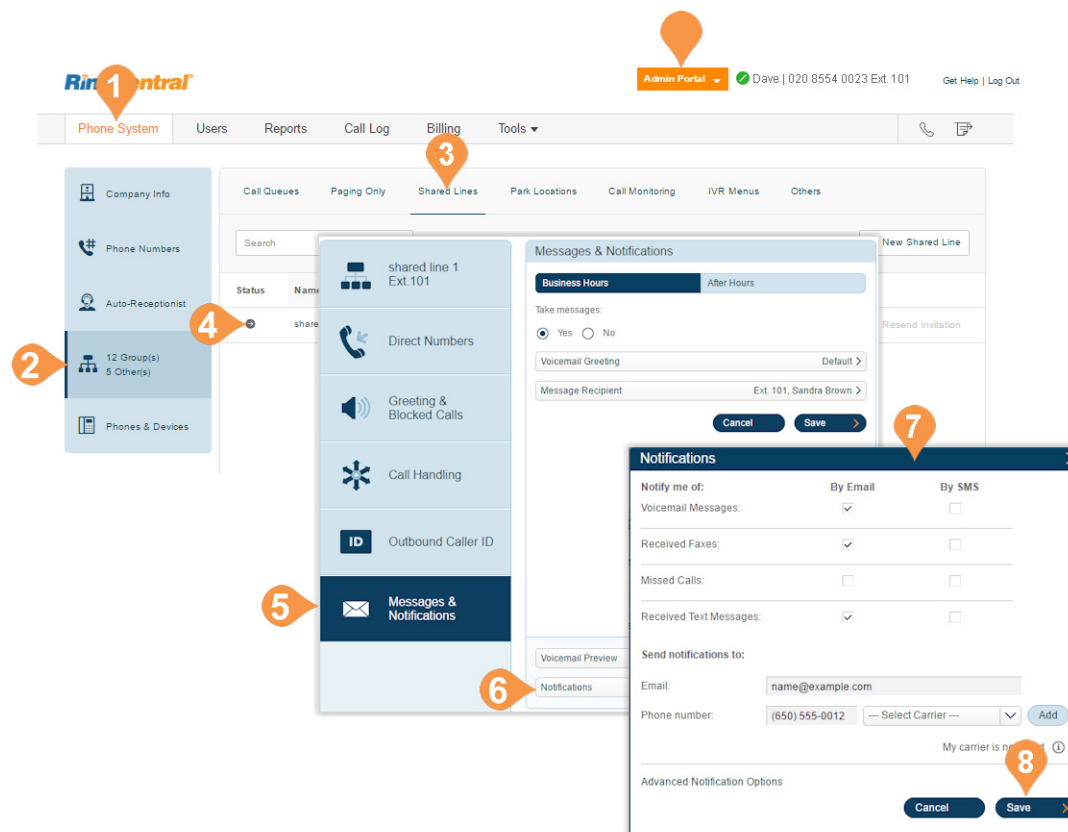
\*Available for Ultimate users only.



## 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.
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.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information. The main navigation menu on the left lists 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is selected, and the 'Groups' section is expanded, showing '14 Group(s)' and '6 Other(s)'. The 'Park Locations' tab is selected within the 'Groups' section. A table lists existing park locations with columns for 'Status', 'Name', and 'Ext.'. A '+ New Park Location' button is visible. An 'Add Park Location' pop-up form is shown, with fields for 'Group Name' and 'Extension Number'. The 'Save' button is highlighted.

Status	Name	Ext.	
✓	Park Location 10001	10001	Disable
✓	Park Location 10002	10002	Disable

**Add Park Location** pop-up form:

Group Name:

Extension Number:

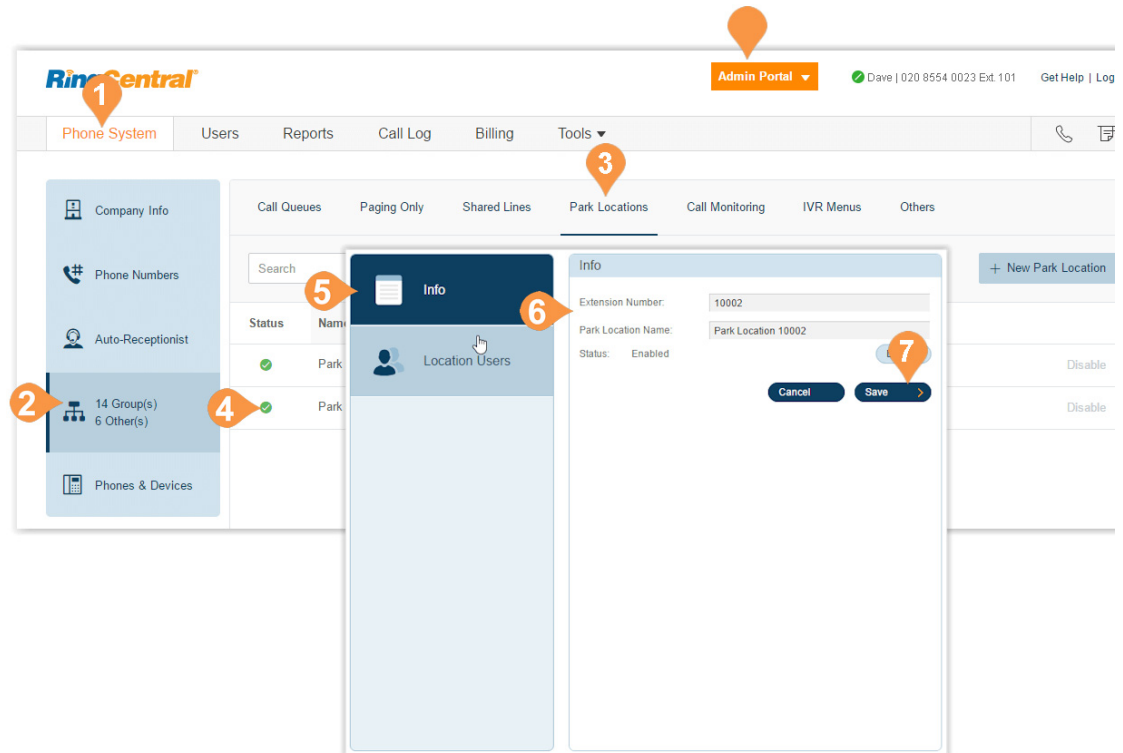
Buttons: Cancel, Save

## 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:

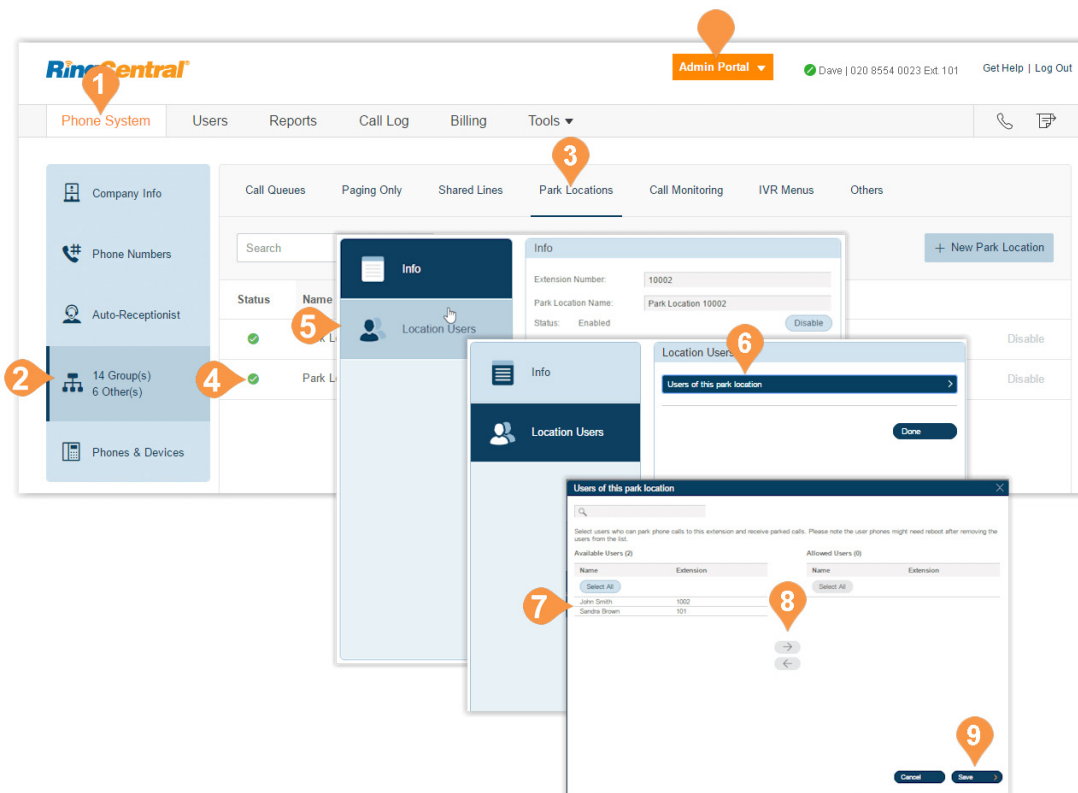
1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Park Location** tab.
4. Select an existing **Park Location**.
5. Click **Location Users**.
6. Click **Users of this park location**.
7. Select users you'd like to add to the group from the right column.
8. 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 108.

## 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 authorised 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 authorised 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.

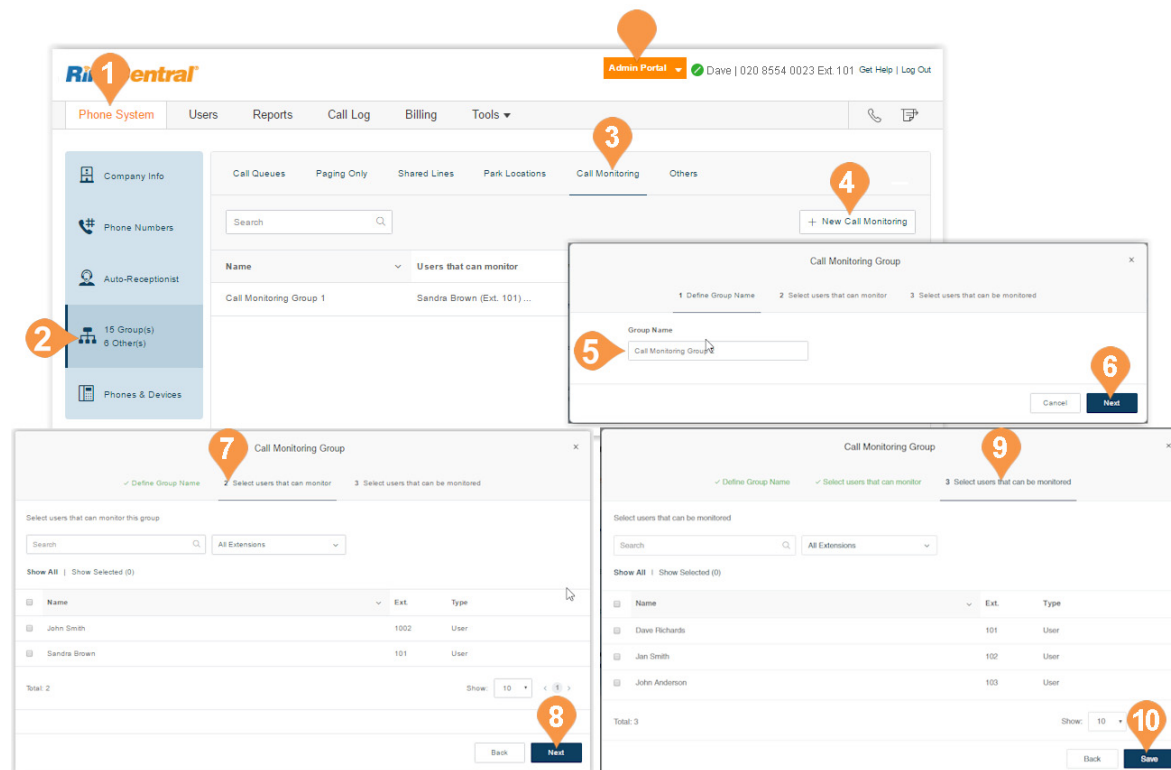
Action	Description	Example	Touch Tone
Monitor	Silently listen in on a call	Supervisors/QA to monitor performance	*80
Whisper	Speak only to the employee without the caller on the other end hearing	Provide support to users to help them handle a call	*81
Barge	Join the call so all parties can communicate 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**.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the 'Admin Portal' dropdown and user information. The left sidebar contains the 'Phone System' tab, which is selected. Under 'Phone System', the 'Groups' option is highlighted. The 'Others' tab is selected in the main content area. The 'New Message-Only Extension' button is visible. The 'Add Messages-Only Extension' pop-up form is displayed, showing fields for 'Extension Name', 'Extension Number', and 'Email'. The 'Save' button is at the bottom right of the form.

Status	Type	Name	Numbers	Ext.	Messages
●	Announcements-Only E...	Announcements Only		14	0 / 0 Resend Invitation Delete
Add Messages-Only Extension					0 / 0 Resend Invitation Delete
					0 / 0 Resend Invitation Delete
					0 / 0 Resend Invitation Delete

Extension Name  
 Extension Number  
 Email

Cancel Save



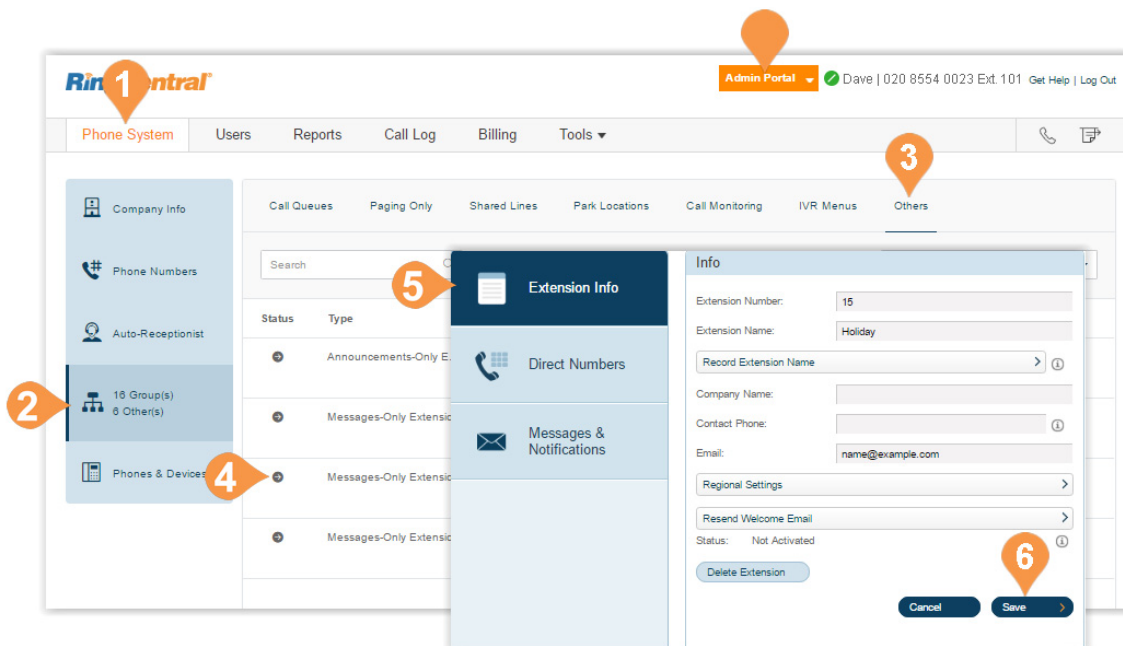
## Configure a Message-Only Extension

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.

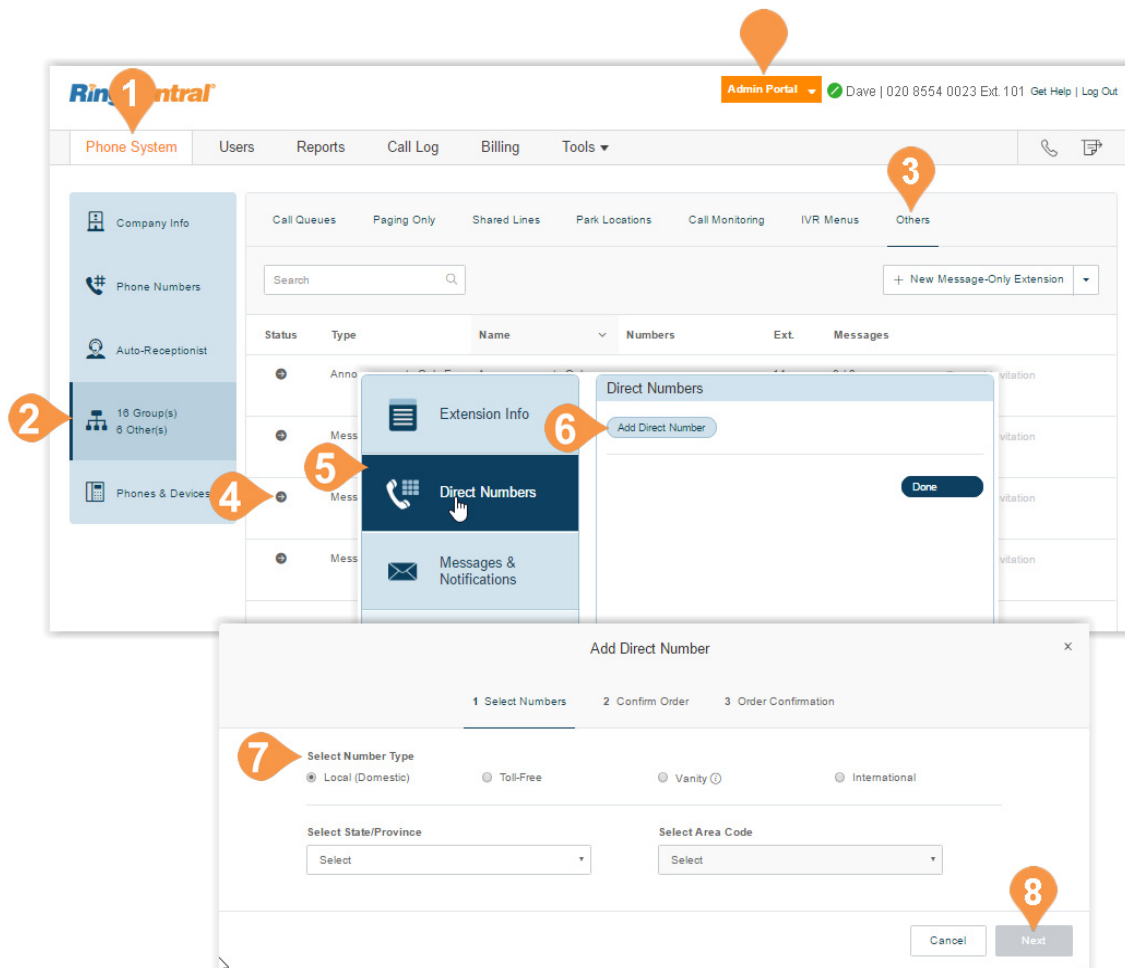
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Extension Info** to edit the following:
  - a. Extension Number
  - b. Extension Name
  - c. Record Extension Name
  - d. Company 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**.

The screenshot illustrates the steps to configure a Message Recipient for a Message-Only Extension in the RingCentral Admin Portal. The interface shows the 'Phone System' tab selected in the sidebar, and the 'Others' tab selected in the main menu. The 'Messages & Notifications' pop-up is open, showing the 'Message Recipient' dropdown. The 'Select Message Recipient' pop-up is also shown, displaying a list of extensions and users.

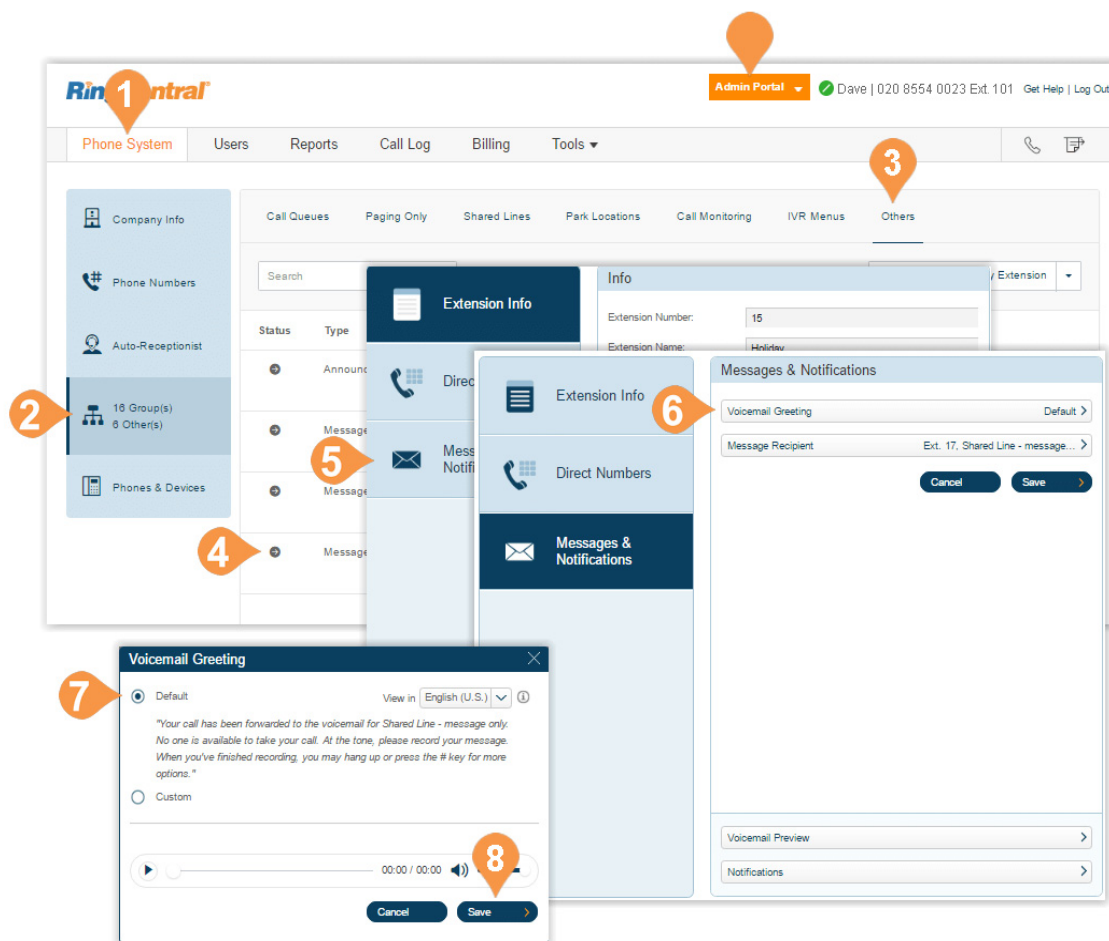
Select	Name	Ext.	Type	Department
<input type="radio"/>	Fax Group 1	3	Message-Only Extension	
<input type="radio"/>	Holiday	15	Message-Only Extension	
<input type="radio"/>	John Smith	1002	User	
<input type="radio"/>	Sandra Brown	101	User	
<input type="radio"/>	shared line 1	8	Shared Lines	
<input type="radio"/>	This extension	17	Message-Only Extension	

## 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**. 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**.

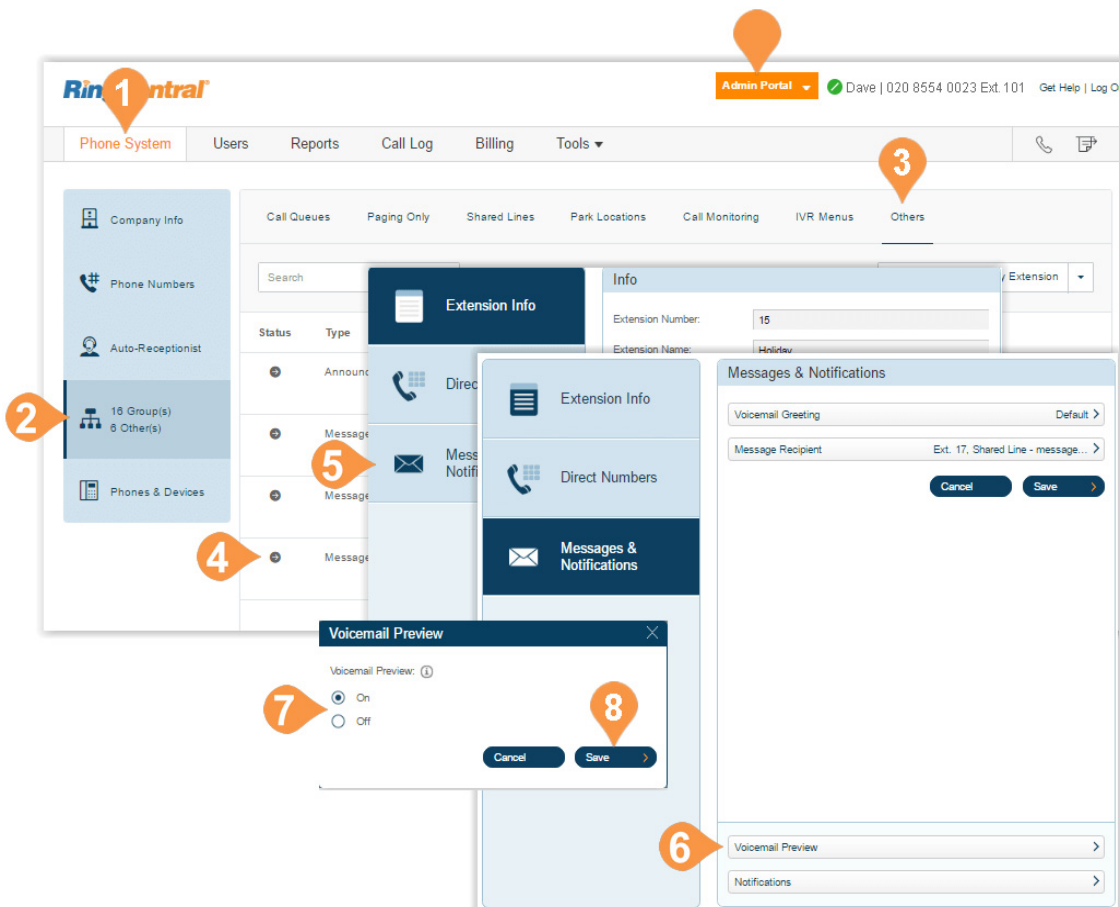


### Set Voicemail Preview\*

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**.

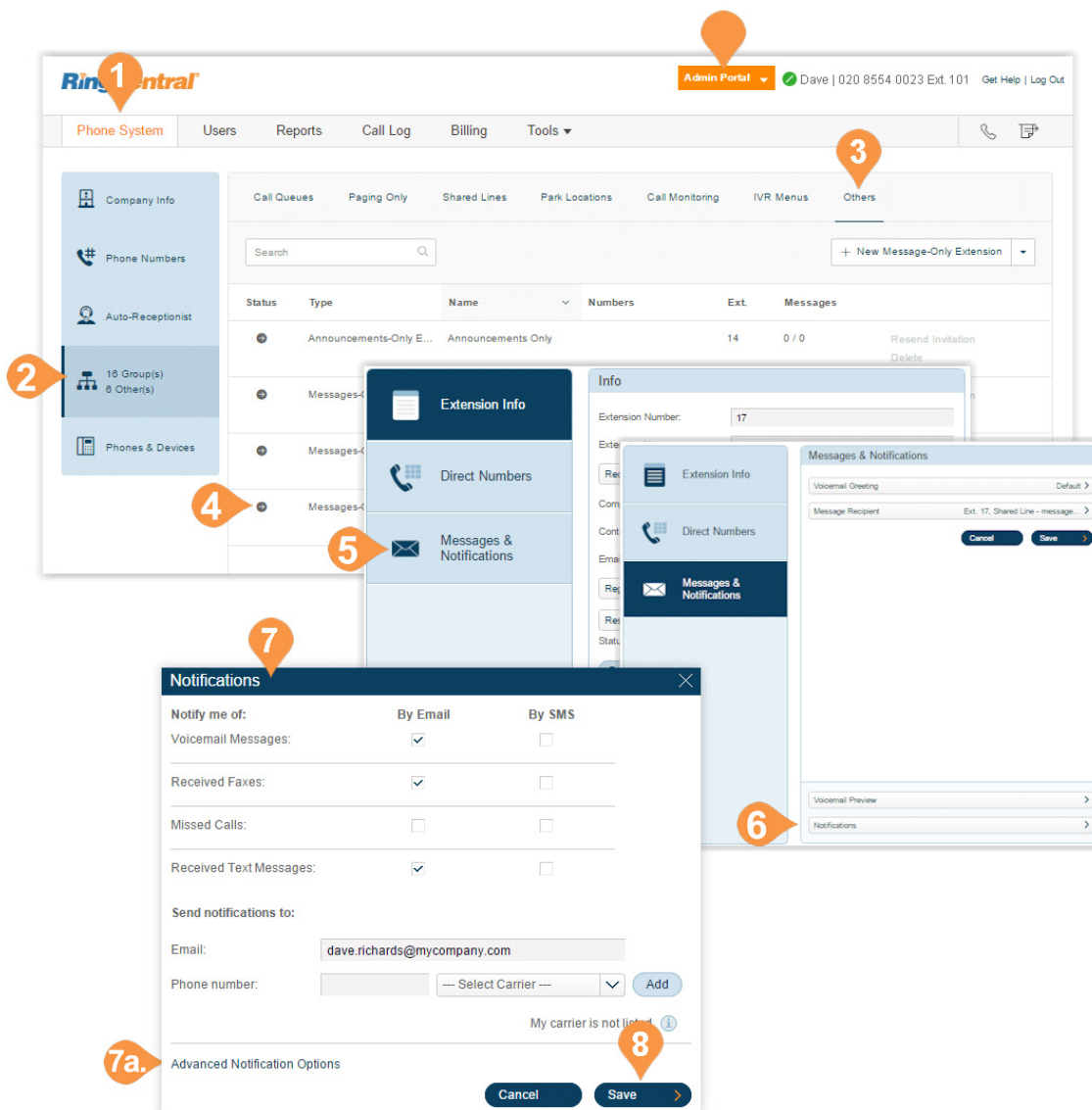
\*Available for Ultimate users only.



## 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**.

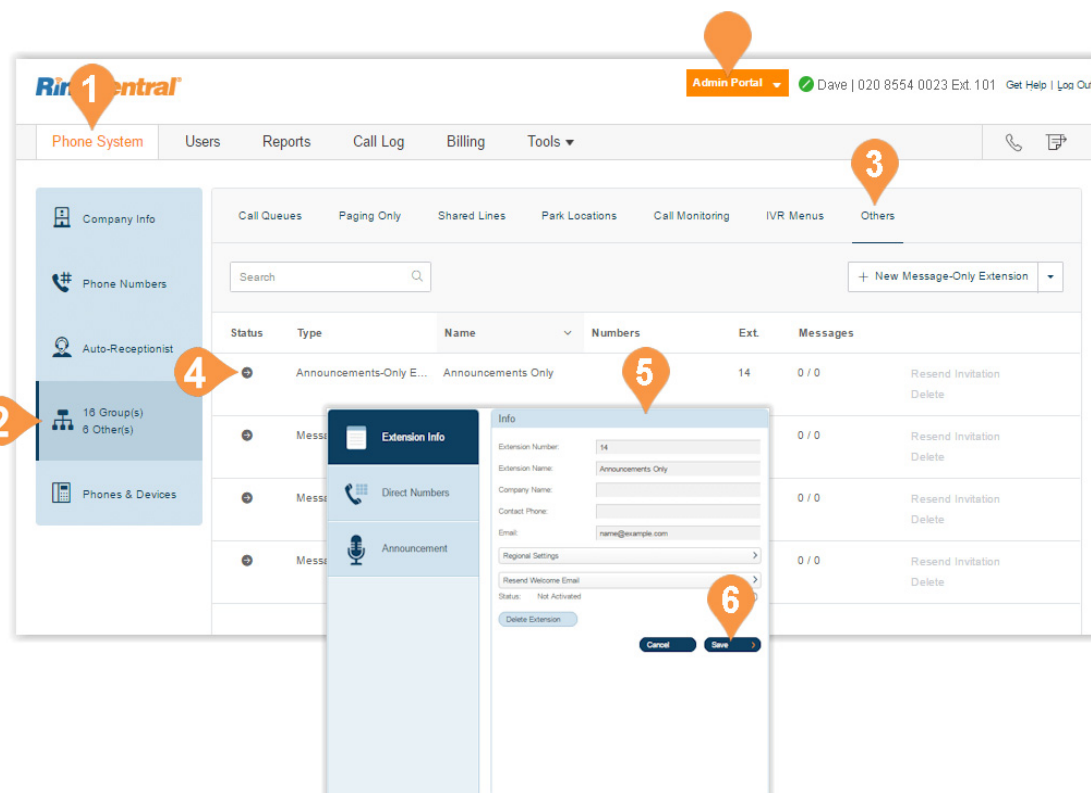
The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the 'Admin Portal' dropdown, user information 'Dave | 020 8554 0023 Ext. 101', and links for 'Get Help' and 'Log Out'. The main navigation tabs are 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, showing a sidebar with 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '16 Group(s)', '6 Other(s)', and 'Phones & Devices'. The 'Others' tab is selected in the main content area, displaying a table with columns for 'Status', 'Type', 'Name', 'Numbers', 'Ext.', and 'Message'. A dropdown menu is open, showing options: '+ New Message-Only Extension', '+ New Message-Only Extension', and '+ New Announcements-Only Extension'. The 'Add Announcements-Only Extension' pop-up is displayed, containing fields for 'Extension Name', 'Extension Number' (with '1' entered), and 'Email'. At the bottom of the pop-up are 'Cancel' and 'Save' buttons.



## Edit Announcements-Only Extension Info

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

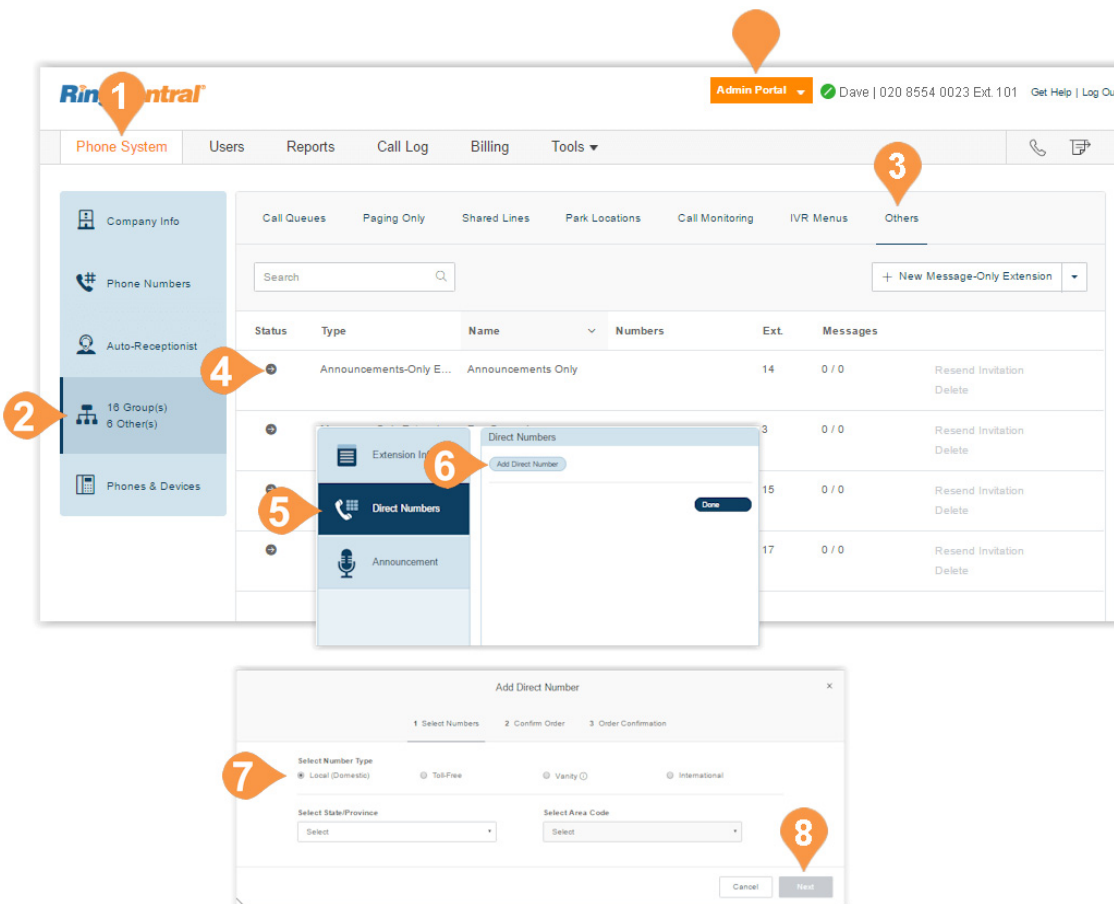
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Announcements-Only Extension**.
5. Edit the **Info** for the extension:
  - a. **Extension Number**
  - b. **Extension Name**
  - c. **Company Name**
  - d. **Contact 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.

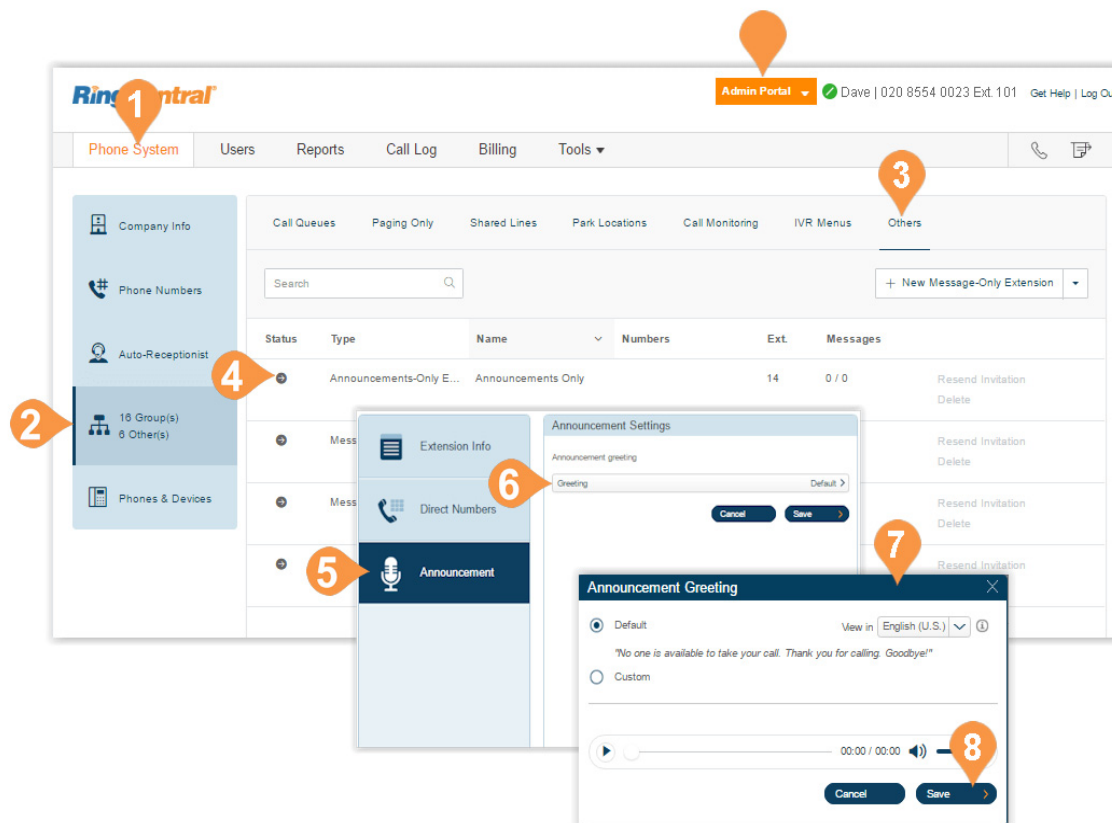
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing Announcement-Only Extension.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Follow these instructions for your selection:
  - a. **Local (Domestic)**: 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

Customise 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.

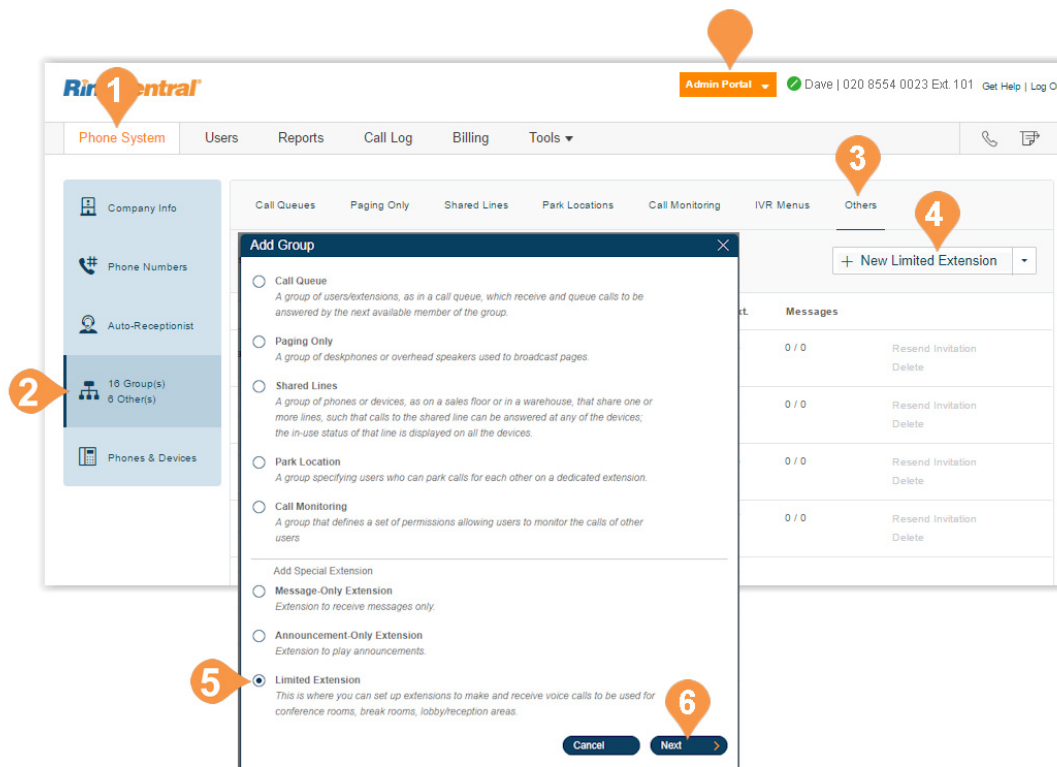
RingCentral provides the ability to separately purchase limited extensions as unassigned extensions and then later set up and activate those extensions by assigning them. Bulk purchases of up to 1,000 extensions are also supported.

### 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.

The screenshots show the 'Buy Unassigned Limited Extension' process in four steps:

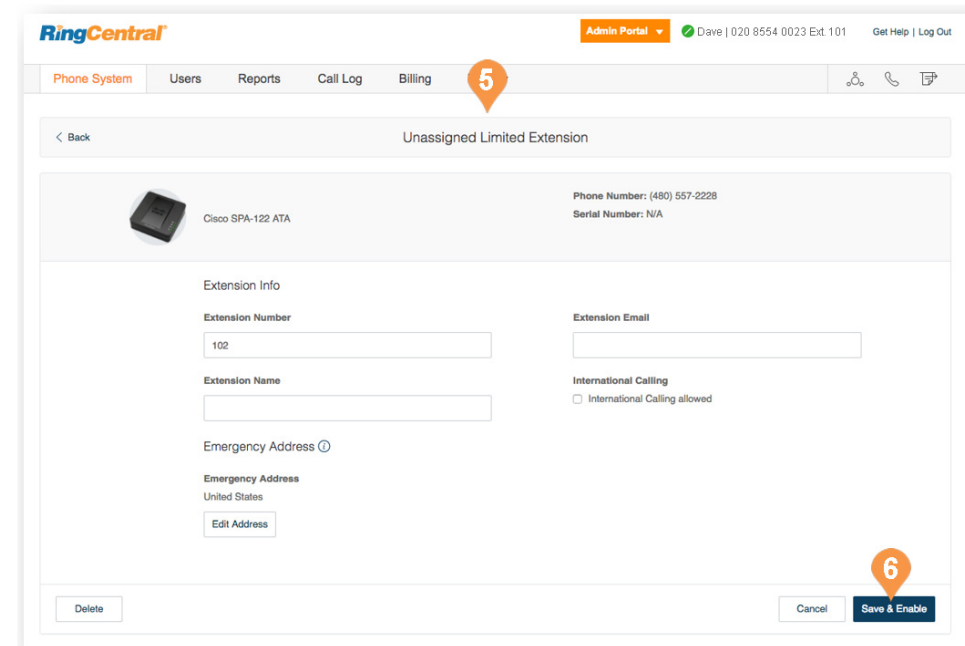
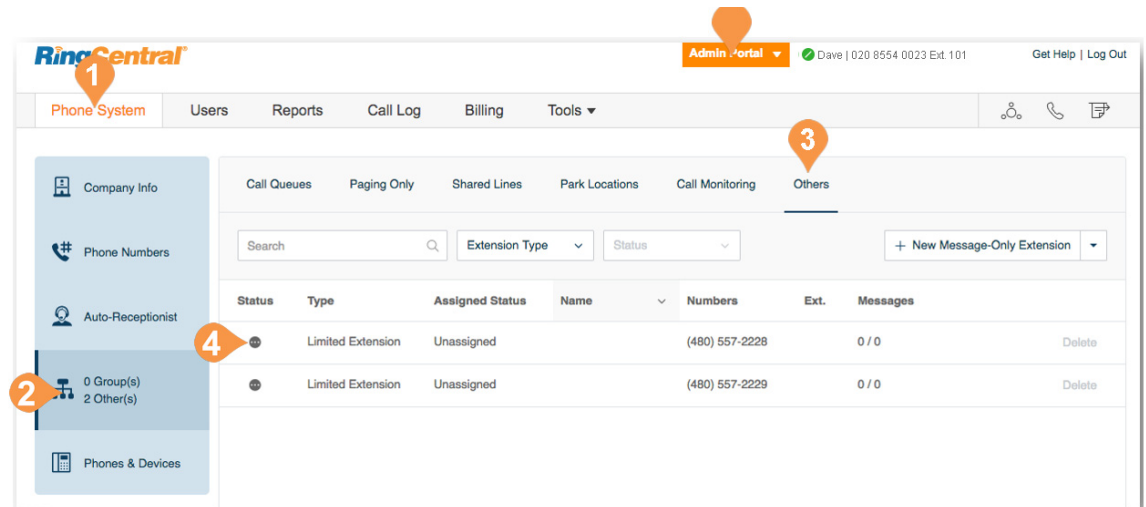
- Step 7: Select a Device** - Shows a selection of devices like 'Cisco SPA-509G Desk Phone' and 'Polycom VVX-311 Gigaset Ethernet Phone'. A 'Purchase' button is visible.
- Step 8: Confirmation** - Shows a summary of the selected device and a 'Next' button.
- Step 9: Assign a Number** - Shows a selection of numbers and an 'Assign to Selected' button.
- Step 10: Confirmation** - Shows a summary of the selected number and a 'Next' button.
- Step 11: Shipping Address** - Shows a selection of shipping addresses and a 'Next' button.
- Step 12: Shipping Options** - Shows a selection of shipping options and a 'Next' button.
- Step 13: Confirmation** - Shows a summary of the selected shipping options and a 'Next' button.

## 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**.

The screenshot illustrates the 'Edit Limited Extension Info' process in the RingCentral Admin Portal. The interface is divided into several sections:

- Top Bar:** Includes the 'Admin Portal' dropdown, user information (Dave | 020 8554 0023 Ext. 101), and links for 'Get Help' and 'Log Out'.
- Navigation Tabs:** 'Phone System' (selected), 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'.
- Left Sidebar:** Contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '16 Group(s) 6 Other(s)' (selected), and 'Phones & Devices'.
- Main Content Area:**
  - Call Queues, Paging Only, Shared Lines, Park Locations, Call Monitoring, IVR Menus, Others:** A set of tabs at the top of the main area.
  - Search:** A search bar with a magnifying glass icon.
  - Table:** A table with columns: Status, Type, Name, Numbers, Ext., and Messages. It lists 'Limited Extension' with 'Announcements Only' type and '14' numbers.
  - Modal Window:** A pop-up window titled 'Break Room Ext. 110016' showing the 'Info' section for the selected extension. It includes fields for:
    - Extension Number: 110016
    - Extension Name: Break Room
    - Record Extension Name: (dropdown)
    - Company Name: (text field)
    - Contact Phone: (text field)
    - Email: example@example.com
    - International Calling allowed: (checked)
    - Regional Settings: (dropdown)
    - Resend Welcome Email: (button)
    - Status: Not Activated
    - Delete Extension: (button)
  - Buttons:** 'Cancel' and 'Save' buttons at the bottom right of the modal.



## 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.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible. Below it, the 'Phone System' tab is selected in the top navigation bar. On the left sidebar, the 'Phones & Devices' option is highlighted. The main content area shows the 'User Phones' tab selected, displaying a table of devices. The table has columns for Status, Device, Assigned, Phone Number, and Serial No. There are five devices listed, including Cisco SPA-303 Desk Phones and RingCentral for Desktop. A '+ Add Device' button is located in the top right of the device list area.

Status	Device	Assigned	Phone Number	Serial No.
	Cisco SPA-303 Desk Phone	New User1	(650) 491-0152	N/A
	Cisco SPA-303 Desk Phone	Jane Smith	(650) 206-0147	CCQ16422G0G
	RingCentral for Desktop	John Smith	(205) 419-0285	LMRC6163
	RingCentral for Desktop	Donald Harrison	(205) 419-0268	N/A
	Yealink SIP-T21P Basic IP Phone	George Mc Lennon	(205) 406-0306	00156589673A

Total: 5      Show: 25      < 1 >

### 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 the button next to **User Phone** and click **Next**.
5. Select a user to assign the phone to. 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.\*
6. Select a phone to rent or buy.
7. Choose to add a new phone number for this phone or assign it to an existing RingCentral number. If you choose to add a new phone number, choose a number from the drop-down menu.

Instructions continue on the next page.

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

**Step 1:** From the **Admin Portal**, select the **Phone System** tab.

**Step 2:** Click **Phones & Devices**.

**Step 3:** Click **Add Device**.

**Step 4:** Select the button next to **User Phone** and click **Next**.

**Step 5:** Select a user to assign the phone to. 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.\*

**Step 6:** Select a phone to rent or buy.

**Step 7:** Choose to add a new phone number for this phone or assign it to an existing RingCentral number. If you choose to add a new phone number, choose a number from the drop-down menu.

**Existing Devices Table:**

Status	Device	Assigned	Phone Number	Serial No.	
●	Cisco SPA-303 Desk Phone	New User1	(650) 491-0152	N/A	Check Progress
●	Cisco SPA-303 Desk Phone	Jane Smith	(650) 206-0147	CCQ16422G0G	
●	RingCentral for Desktop	John Smith	(205) 419-0285	LMRC6163	
●	RingCentral for Desktop	Donald Harrison	(205) 419-0268	N/A	
●	Yealink SIP-T21P Basic IP Phone	George Mc Lennon	(205) 406-0306	00156589673A	

Total: 5      Show: 25      < 1 >

**Select Device Type Dialog:**

- ☒ **User Phone**  
An activated IP phone assigned to a user.
- ☐ **Unassigned Phone**  
An IP phone in your account that is not yet activated or assigned to a user.
- ☐ **Paging Device**  
A wall-mounted speaker or amplifier that enables overhead paging.
- ☐ **Common Phone**  
A shared phone in which users can log-in with their credentials to start using it.

**Select Phone Dialog:**

Line type: DigitalLine Unlimited \$419.00  
Unlimited outbound local and long-distance calls anywhere in the US and Canada. Unlimited inbound calling to local RingCentral numbers. Low international rates.

**Select User and Location Dialog:**

Assign to: Ext. 104 - Jen Williams

Phone Number Location: ☒ Domestic ☐ International

\* You can only add phones in one country in one transaction. To add phones in different countries, please start new transaction after you complete this one.

**Add Phone Number Dialog:**

Do you need a new phone number for this phone:

☒ Yes

☐ No, I want to assign an existing RingCentral number ⓘ

8. Name your new phone.
9. Register your emergency address.
10. Choose to add more phones or proceed to checkout.
11. Select your shipping preferences and click **Next**.
12. 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.

8
 Name New Phone

Selected phone: Cisco SPA-303 Desk Phone  
 Assign to: Ext. 101 - Dave Richards  
 Phone Nickname: Dave Richards Cisco SPA-303 Desk Phone  
 Back Next

9
 Emergency Address

Emergency Calling – Registered Address  
 You must enter the address of the physical location where you will use the RingCentral service for this digital line. Where available, this address will be provided to first responders when you make an emergency call using your RingCentral service (911 in the United States and Canada, 999/112 in the United Kingdom and throughout the European Union, 999/995/993 in Singapore, and any other applicable Emergency Services number).  
 Customer Name: My Company  
 Street Address: 123 Main Street  
 Apartment / Suite #:   
 City: San Mateo  
 State/Province: California  
 Zip Code: 94404  
 Country: United States  
 Important: You must update this address every time you move your RingCentral IP phone or Emergency Dialing-Enabled Softphone to a different location. You may update the Registered Address at any time through <http://service.ringcentral.com>. Please note that it may take several hours for any address update to take effect.  
 Emergency calling will not be available in the event of an internet or power outage, or if your broadband, ISP, or RingCentral Office service is terminated. On your mobile device, emergency dialing is available exclusively using your mobile service. The RingCentral Mobile Application cannot send emergency calls over Wi-Fi access. It is possible that network congestion may delay or prevent completion of an emergency call. RingCentral emergency dialing service may not be available from some international numbers outside of the United States, Canada, United Kingdom, and Singapore. It is strongly recommended that you have an alternative means for placing emergency calls available at all times.  
 RingCentral Provides Access to Emergency Calling Services. RingCentral provides access to emergency calling services, allowing most RingCentral Office Users to access Emergency Services (911 in the United States and Canada, 999/112 in the United Kingdom and throughout the European Union, 999/995/993 in Singapore, and any other applicable Emergency Services number). Your access may differ depending on your location or the device you are using, and it works differently than you may have experienced using traditional wireline or wireless telephones. It is strongly recommended that you have an alternative means for placing emergency calls available at all times.  
 RingCentral Office users using IP Desk Phones or Emergency Services-Enabled Softphones can dial emergency numbers directly from their IP Desk Phones or Emergency Services-Enabled Softphones. EMERGENCY CALLS CANNOT BE PLACED THROUGH SOFTPHONES THAT ARE NOT EMERGENCY SERVICES-ENABLED.  
 Emergency calls placed through the RingCentral Office Mobile Application on a smartphone are automatically routed to the native dialer on the smartphone, and the call will be handled by your wireless service provider if wireless service is available. If your wireless service is unavailable, the call cannot be placed. The RingCentral Mobile Application cannot  
☒ By clicking "agree and continue" below, you acknowledge and agree that you have read and understand that emergency calling service with your RingCentral services (1) may not work in the event of internet or power outage or as otherwise described above; (2) is available on your mobile phone only through your underlying mobile service and will not work if you do not have mobile service available; and (3) you agree to immediately update your Registered Address based on the current address at which this digital line will be used.  
 I Accept  
 Back

10
 Add more phones?

Would you like to add more phones now?  
 Yes, add more phones  
 No, proceed to checkout

11
 Shipping

Ship attention to: Dave Richards  
 Select Address: New Address  
 Shipping Address: 123 Main Street  
 Address2:   
 City: San Mateo  
 State/Province: California  
 Zip Code: 94404  
 Country: United States  
 Please select your shipping option:  
☒ GROUND: \$18.95  
☐ 2 DAY: \$34.95  
☐ OVERNIGHT: \$52.95  
 Please allow 5-7 business days for Ground delivery.  
 Back Next

12
 Confirm Order

Charges  

12/07/2014 - 12/06/2015	Charges	
Additional RingCentral Services	\$419.88	Expand
One Time Charges	Charges	
Additional RingCentral Services	\$137.95	Expand
Charges: \$557.83		

 Adjustments  

12/07/2014 - 04/16/2015	Credit	
Prorate Adjustment - Additional RingCentral Services	(\$149.55)	Expand
Adjustments: (\$149.55)		

 Taxes, Charges and Fees  

State and local taxes and fees	\$16.16
e911 Service Fee	\$8.00
Federal Universal Service Fund	\$25.68
Compliance and Administrative Cost Recovery Fee	\$24.00
Taxes and Fees: \$73.84	
Total Charges: \$557.83	
Total Adjustments: (\$149.55)	
Total Taxes & Fees: \$73.84	
Sub-total: \$482.12	
Total deducted from account credit balance: \$0.00	
Total charged to credit card: \$482.12	

 Adjustments are calculated based on the unused portion of your previous service(s) and deducted from the cost of your new service(s).  
 All charges will appear as "RingCentral, Inc" on your credit card statement and will be charged to the credit card on file for this account. Your credit card information is encrypted and processed on a secure server.  
☒ I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of \$482.12 to be charged to my credit card ending in 111111. I further authorize the annually recurring charges of \$419.88 beginning on 12/07/2015 and continuing until cancelled, which is in addition to my regular charges.  
 Back Next

## 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 140. For more information on managing limited extensions and on enabling a limited extension for hot desking, see "Limited Extensions" on page 126.

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**.

The screenshot illustrates the steps to add a hot desk phone in the RingCentral Admin Portal. The interface is divided into a sidebar and a main content area. The sidebar contains the 'Phone System' tab (highlighted with a red circle 1) and the 'Phones & Devices' tab (highlighted with a red circle 2). The main content area shows the 'Common Area Phones' tab (highlighted with a red circle 3). A table lists existing phones with columns for Status, Type, Device, and Serial No. A dropdown menu for 'Type' is open, showing 'Hot Desk' and 'Limited Ext + Hot Desk' options (highlighted with a red circle 4). A 'Buy Hot Desk Phone' modal is open, showing a selection of devices (highlighted with a red circle 5) and a 'Next' button (highlighted with a red circle 6).

Status	Type	Device	Existing P...	(240) 200-1009	Serial No.
<input type="checkbox"/>	Hot Desk	Polycom VVX411	Existing P...	(240) 200-1009	64167F010BA8
<input type="checkbox"/>	Limited Ext + Hot Desk	Polycom VVX500	Existing P...	(209) 200-0680	0004F28133F3

QTY	Item	Price
1	Polycom VVX-411 Color...	\$229.00

Subtotal: \$229.00  
\*Excludes taxes, fees and/or shipping

## 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.

**Step 4: Select Device Type**

What device would you like to add?

- ☐ User Phone  
*An activated IP phone assigned to a user.*
- ☐ Unassigned Phone  
*An IP phone in your account that is not yet activated or assigned to a user.*
- ☒ Paging Device  
*A wall-mounted speaker or amplifier that enables overhead paging.*
- ☐ Common Phone  
*A shared phone in which users can log-in with their credentials to start using it.*

**Step 5: Add Paging Device**

Only the following paging devices are supported by RingCentral:

- CyberData SIP-enabled IP V2 Paging Speaker
- CyberData SIP-enabled IP V2 Paging Amplifier

Device Nickname:

**Step 6: Add Paging Device**

Provisioning information for CyberData paging devices:

CyberData paging devices need to be programmed with the information given below to make them fully functional when assigned to paging group.

Step 1: Open a web browser session to the CyberData device. Please consult the vendor documentation for details on how to determine the IP address of your device and how to enter the relevant login credentials.

Step 2: Navigate to the Networking page and confirm that the device is configured for DHCP operation.

Step 3: Navigate to the SIP Configuration page and enter the following settings in the appropriate fields and Click "Save". The device may reboot.

SIP Server	sip.ringcentral.com
Remote SIP port	5060
Local SIP port	5060
Outbound Proxy	sip20.ringcentral.com
Outbound Proxy Port	5090
SIP User ID	16503979449*559
Authenticate ID	559960440
Authenticate Password	456823w8lhd9

## 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**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible next to the user's name 'Dave' and contact information. The main navigation bar includes tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar contains a list of options: 'Company Info', 'Phone Numbers', 'Auto-Receptionist', and 'Phones & Devices'. The 'Phones & Devices' option is selected, indicated by an orange callout '2'. The main content area shows the 'Shared Lines' tab selected, with an orange callout '3'. Below the tabs, there is a search bar labeled 'Search Shared Lines' and a 'Device' dropdown menu, with an orange callout '4' pointing to the search bar. The table below has columns for 'Shared Line', 'Phones Assigned', 'Lines', and 'Extension', with an orange callout '5' pointing to the 'Shared Line' column. The table currently shows 'No results'. At the bottom, the 'Total: 0' is displayed, along with a 'Show: 25' dropdown and pagination controls.

## Add an Unassigned Phone

An unassigned phone is an IP phone in your account that 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

The screenshot illustrates the process of adding an unassigned phone in the RingCentral Admin Portal. The interface is divided into a sidebar, a top navigation bar, and a main content area.

**Step 1:** The **Admin Portal** is accessed, showing the user's name (Dave) and contact information (020 8554 0023 Ext. 101).

**Step 2:** The **Phone System** tab is selected in the top navigation bar.

**Step 3:** The **Unassigned** tab is selected in the sub-navigation bar.

**Step 4:** The **Add Device** button is clicked.

**Step 5:** The **Buy unassigned phone** modal is displayed. The **Location** step is selected, and the user is prompted to select a location (Domestic or International).

**Step 6:** The **Next** button is clicked.

**Step 7:** The **Buy unassigned phone** modal is displayed. The **Buy phones** step is selected, and the user is prompted to select a device. The **Order: 1 Device (max. 50)** is shown.

**Step 8:** The **Next** button is clicked.

The **Buy unassigned phone** modal shows a list of devices and a summary table:

QTD	Item	Price
1	Polycm VVX 101 Basic IP Phone	£79.00

Subtotal: £79.00  
\*Excludes taxes, fees and/or delivery



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**.

**8** Add more phones?

Would you like to add more phones now?

**Yes, add more phones**

**No, proceed to checkout**

**9** Shipping

Ship attention to: Dave Richards

Select Address: New Address

Shipping Address: 123 Main Street

Address2

City: San Mateo

State/Province: California

Zip Code: 94404

Country: United States

Please select your shipping option:

☒ GROUND: \$18.95

☐ 2 DAY: \$34.95

☐ OVERNIGHT: \$52.95

Please allow 5-7 business days for Ground delivery.

**Back** **Next**

**Confirm Order**

**Charges**

One Time Charges	Charges
Additional RingCentral Services ⓘ	\$257.95 Expand

Charges: \$257.95

**Taxes, Charges and Fees**

☒ State and local taxes and fees \$22.12

Taxes and Fees: \$22.12

Total Charges: \$257.95

Total Adjustments: \$0.00

Total Taxes & Fees: \$22.12

Sub-total: \$280.07

Total deducted from account credit balance: \$280.07

Total charged to credit card: \$0.00

\$280.07 was deducted from your Account Credit (your remaining Account Credit is \$780.45).

☒ I acknowledge that I have read this information and understand the itemized charges listed. I authorize \$280.07 to be deducted from my Account Credit.

**Back** **Next**

**10**

## 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 601, 501, 500, 411, 311, 310, and 410.

### 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 **Phone & 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.

[Admin Portal](#) ▼

● Dave | 020 8554 0023 Ext. 101

[Get Help](#) | [Log Out](#)[Phone System](#)[Users](#)[Reports](#) ▼[Call Log](#)[Billing](#)[Tools](#) ▼[< Back](#)

Polycom VVX311



Device: Polycom VVX311

Serial Number: 04001111111111111111 ⓘ

Assigned Type: Limited Extension Phone

☒ Use as Hot Desk Phone

Status

Order in Progress

[Check Progress](#)

Name ⓘ

Polycom VVX-311 Gigabit Ethernet Phone

Assigned To

User

Recreation - Ext. 110017

Phone Number

(510) 629-4224 [View](#)[Edit Number](#)

Default Area Code ⓘ

510

Bandwidth Settings ⓘ

Data Usage

High ▼

☒ Use HD Voice if possible

Emergency Address ⓘ

Emergency Address

20 DAVIS DR, BELMONT, CA, 94002, United States

[Edit Address](#)[Cancel](#)[Save](#)

## 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.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information (Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out). The main navigation bar contains tabs: Phone System, Users, Reports, Call Log, Billing, and Tools. The left sidebar lists navigation options: Company Info, Phone Numbers, Auto-Receptionist, 5 Group(s) 3 Other(s), and Phones & Devices. The 'Unassigned' tab is selected in the main content area, showing a table of unassigned phones. The table has columns for Status, Device, Phone Number, and Serial No. Below the table, a detailed view of a selected phone is shown, including fields for Device (Polycom VVX311), Serial Number (N/A), Assigned Type (Unassigned Phone), Status, and Order In Progress. A 'Check Progress' button is visible. At the bottom, a message states 'This device has not been setup yet' with two options: 'Setup & Assign' and 'Convert to Common Phone'.

Status	Device	Phone Number	Serial No.	Check Progress	Assign To
Unassigned	Cisco SPA-303 Desk Phone	(650) 763-0149	N/A	Check Progress	Assign To
Unassigned	Cisco SPA-303 Desk Phone	(650) 515-0171	N/A	Check Progress	Assign To
Unassigned	Cisco SPA-303 Desk Phone	(650) 763-0171	N/A	Check Progress	Assign To
Unassigned	Cisco SPA-303 Desk Phone	(650) 491-0148	N/A	Check Progress	Assign To
Unassigned	Cisco SPA-303 Desk Phone	(650) 491-0149	N/A	Check Progress	Assign To
Unassigned	Cisco SPA-303 Desk Phone	(650) 763-0153	N/A	Check Progress	Assign To

Total: 6 Show: 25 < 1 >

Device: Polycom VVX311  
Serial Number: N/A  
Assigned Type: Unassigned Phone  
Status  
Order In Progress  
Check Progress

This device has not been setup yet

Setup & Assign Or Convert to Common Phone

## 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.

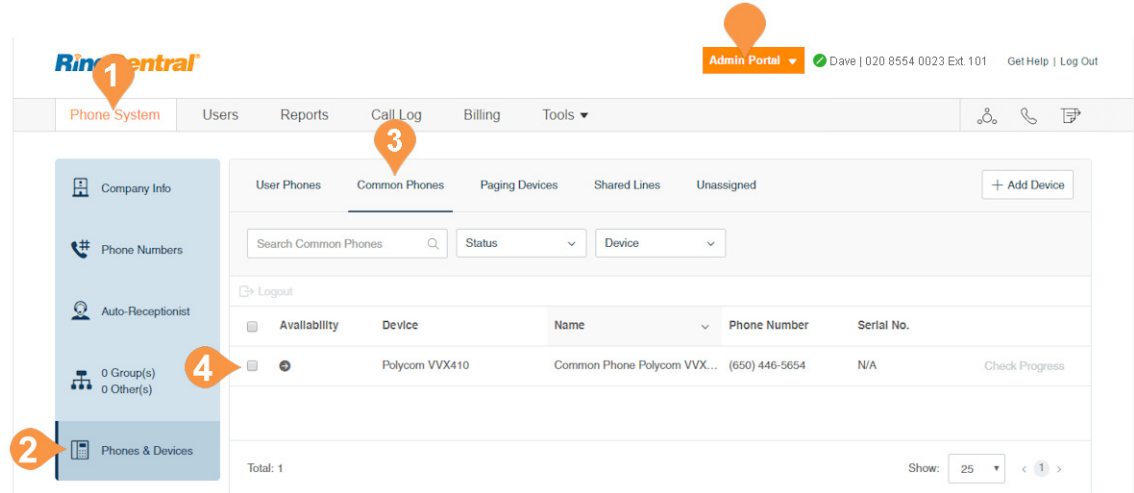
## Log out a Hot Desk Phone

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.



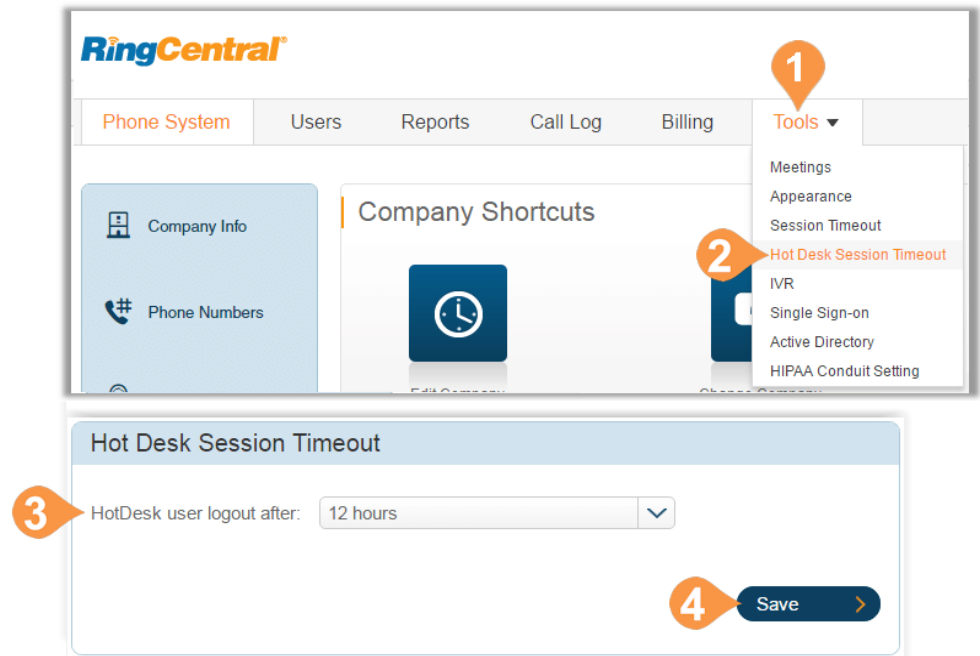
The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', and 'Phones & Devices'. The main content area shows the 'Common Phones' tab with a table of phone details. The table has columns for 'Availability', 'Device', 'Name', 'Phone Number', and 'Serial No.'. A single phone is listed: 'Polycom VVX410' with phone number '(650) 446-5654'. A 'Logout' button is visible in the top right corner of the main content area. Numbered callouts 1 through 5 indicate the sequence of actions: 1. Admin Portal, 2. Phones & Devices, 3. Common Area Phones, 4. Select a phone, and 5. Logout button.

### 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.

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

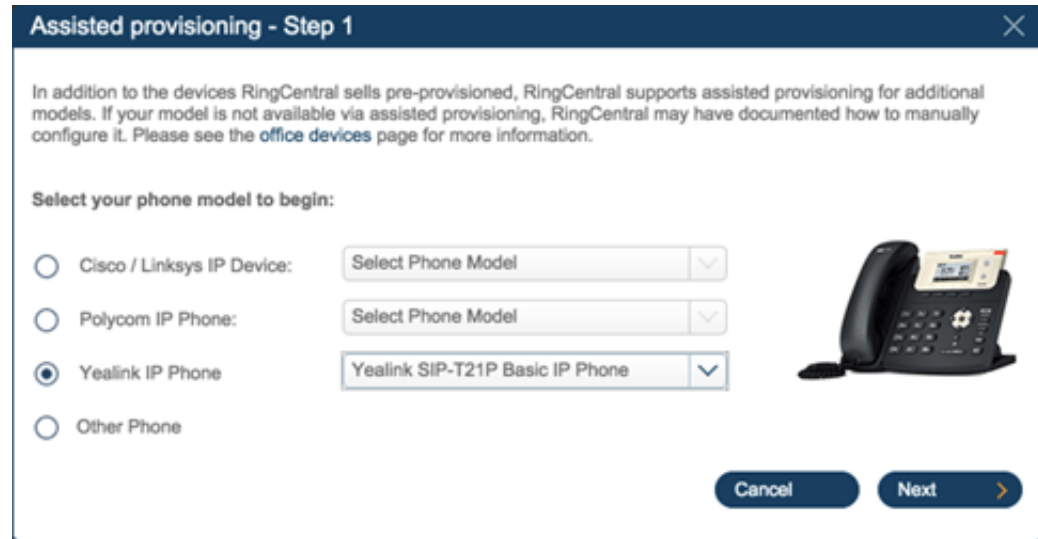
1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Hot Desk Session Timeout**.
3. Set the session timeout from the menu.
4. Click **Save**.



## 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.




**Assisted provisioning - Step 1**

In addition to the devices RingCentral sells pre-provisioned, RingCentral supports assisted provisioning for additional models. If your model is not available via assisted provisioning, RingCentral may have documented how to manually configure it. Please see the [office devices](#) page for more information.

Select your phone model to begin:

- ☐ Cisco / Linksys IP Device:
- ☐ Polycom IP Phone:
- ☒ Yealink IP Phone:
- ☐ Other Phone





# 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.

RingCentral Admin Portal

Phone System **Users** Reports Call Log Billing Tools

Users With Extensions Unassigned Extensions

Search Users [ ] Status [ ] Roles [ ] + Add User Download User List

Department [ ]

Delete Enable Disable Resend Invite Apply Templates

Status	Name	Number	Ext.	Roles	Department	Msg.	
✓	Bob Miller	(205) 538-0122...	104	Manager	Quality Assurance	0 / 0	Disable
✓	Debbie Smith		105	User Admin		0 / 0	Disable
✓	John Smith ...	(205) 538-0301...	150	Super Admin		0 / 2	
✓	Sam Smith	(650) 682-1372	103	Standard (Int...	Customer Service	2 / 3	Disable
✗	Sandra Bro...	(205) 538-3967	102	Standard (Int...		0 / 0	Resend Invite   Delete

Total: 5 Show: 25 < 1 >

RingCentral Admin Portal

Phone System **Users** Reports Call Log **Billing** Tools

Users With Extensions Unassigned Extensions

Search Users [ ] + Add User

Name	Serial	Number
Ext. with Cisco SPA-303 Desk Phone		(650) 257-8526
Ext. with Cisco SPA-303 Desk Phone		(650) 257-8542
Ext. with Cisco SPA-303 Desk Phone		(650) 472-4072
Ext. with Cisco SPA-303 Desk Phone		(650) 472-4082
Ext. with Existing device		(720) 388-7581
Ext. with Existing Phone		(206) 257-7061
Ext. with no device assigned		
Ext. with RingCentral for Desktop		(205) 588-2144
Ext. with RingCentral for Desktop		(205) 623-6902
Ext. with RingCentral for Desktop		(205) 545-8183

Total users: 10 Extensions per page: 25 < 1 >

## 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.

The screenshot shows the RingCentral Admin Portal interface. The 'Users' tab is selected in the top navigation bar. A sidebar on the left contains links for 'User list', 'Roles', 'User groups', and 'Templates'. The main area displays a table of 'Users With Extensions' and 'Unassigned Extensions'. A pop-up window titled 'Add Users' is open, showing a progress bar with steps: 1 Location, 2 Add Users, 3 Shipping Address, and 4 Confirmation. The 'Add Users' step is currently active, showing options for 'Domestic' or 'International' location. A second pop-up window, also titled 'Add Users', shows the 'Add Users With Phones' section. This window includes an 'Account Status' section with details about the plan (20 - 99 Users) and a table for adding phone devices. The table has columns for 'Number of Users', 'Area Code', 'Device', and 'Phone Charges'. The first row shows 2 users with area code 530 - Quincy, using Polycorn VVX-310 Gigabit Et... devices, with a charge of \$338.00 (2 X \$169.00) - one-time.

## 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.

The screenshot illustrates the RingCentral Admin Portal interface for adding users without phones. The top navigation bar includes the 'Admin Portal' link and user information. The sidebar on the left contains links to 'User list', 'Roles', 'User groups', and 'Templates'. The main content area features tabs for 'Users With Extensions' and 'Unassigned Extensions'. A table lists existing users, including Donald Harrison. A 'Total users: 12' indicator is present. A pop-up window titled 'Add Users' is shown, with steps 1 to 5. Step 1 is 'Location', step 2 is 'Add Users', step 3 is 'Shipping Address', step 4 is 'Confirmation', and step 5 is 'Next'. The 'Add Users' step is expanded, showing options for 'Domestic' and 'International' locations. A second pop-up window titled 'Add Users' is shown, with steps 1 to 5. Step 1 is 'Location', step 2 is 'Add Users', step 3 is 'Shipping Address', step 4 is 'Cost Center Codes', and step 5 is 'Confirmation'. The 'Add Users' step is expanded, showing the 'Account Status' section with details about the plan and user limits. Below this, there are fields for 'Number of Users', 'State', 'Area Code', and 'Device'. A table at the bottom shows the details for the users being added, including the number of users, area code, device, and phone charges.

## 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.

The screenshot illustrates the process of exporting a user list from the RingCentral Admin Portal. It is divided into two main sections: the Admin Portal interface and the resulting Excel file.

**Admin Portal Interface:**

- Top Navigation:** Includes the RingCentral logo, an "Admin Portal" dropdown menu (marked with a red circle 1), and user information: "Dave | 020 8554 0023 Ext. 101". There are links for "Get Help" and "Log Out".
- Left Sidebar:** Contains "Phone System", "Users" (highlighted with a red circle 1), "Reports", "Call Log", "Billing", and "Tools".
- Main Content Area:**
  - Buttons: "User list", "Roles", and "Templates".
  - Tabs: "Users With Extensions" (selected) and "Unassigned Extensions".
  - Search and Filters: "Search Users" input field, "Status" dropdown, "Roles" dropdown, "+ Add User" button, and "Download User List" button (marked with a red circle 2).
  - Table:

Status	Name	Number	Ext.	Roles	Messages
✓	Donald Harrison	(205) 419-0268	104	Standard (Internation...	3 / 3
⊕	George Mc Lennon	(205) 406-0306 ...	103	Standard (Internation...	0 / 0
✓	Jane Smith	(650) 206-0147	102	Standard Internation...	1 / 1
✓	John Smith (Super Admin)	(205) 419-0285	101	Super Admin	0 / 0
⊕	New User1	(650) 491-0152	401	Standard (Internation...	0 / 0

**Excel File (62816311006-20171010.xls):**

- File Name:** 62816311006-20171010.xls [Compatibility Mode] - Excel
- Formulas Tab:** Shows the "General" formula bar with the value "62934108006".
- Worksheet:**

	Mailbox ID	First Name	Last Name	Roles	Email	Mobile Phone	Department	Extension
4	62934108006	Bob	Miller	Manager	dave.richards@exa		Quality Assurance	104
5	62934108006	Bob	Miller	Manager	dave.richards@exa		Quality Assurance	104
6	62934108006	Bob	Miller	Manager	dave.richards@exa		Quality Assurance	104
7	62979221006	Debbie	Smith	User Admin	dave.richards@exa			105
8	62816311006	John	Smith	Super Admin	dave.richards@exa			150
9	62816311006	John	Smith	Super Admin	dave.richards@exa			150
10	62816311006	John	Smith	Super Admin	dave.richards@exa			150
11	62816311006	John	Smith	Super Admin	dave.richards@exa			150
12	62914834006	Sam	Smith	Standard (Internat	samsmith@gmail.c		Customer Service	103
13	62912830006	Sandra	Brown	Standard (Internat	dave.richards@exa			102

## 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.

The screenshot illustrates the bulk edit user information process in the RingCentral Admin Portal. The interface shows the 'Users' tab selected in the navigation bar. The 'Edit User Information' dialog box is open, displaying the 'Step 1: Get Template' section. A 'Download' button is highlighted with an orange circle 2. Below the dialog box, a Microsoft Excel spreadsheet is shown with the template filled out, with an orange circle 4 highlighting the 'Download' button. The spreadsheet has columns for Mailbox ID, Extension, First Name, Last Name, RingCentral text-to-speech name, and Contact Phone. An 'Edit User Information - Confirmation' dialog box is open, asking 'You are about to make changes for all users in the file. This will overwrite current values. Are you sure you want to proceed?' with 'No' and 'Yes' buttons. An orange circle 6 highlights the 'Yes' button.

## 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.

The screenshot illustrates the steps to convert a virtual extension to a digital line in the RingCentral Admin Portal. The process is guided by numbered callouts:

- 1:** Select the **Users** tab in the top navigation bar.
- 2:** Select a user from the **Users** list.
- 3:** Click **Phones & Numbers** in the user's details modal.
- 4:** Click **Phones** in the **Phones & Numbers** section.
- 5:** Click **Add Phone** in the **Phones** section.
- 6a:** In the **Buy User Phone** wizard, select a phone for the user.
- 6b:** In the **Buy User Phone** wizard, click **Existing Number** on the **Select Number** screen.

## 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**.

The screenshot illustrates the RingCentral Admin Portal interface for configuring call forwarding. Key elements include:

- Admin Portal Header:** Shows the user's name (Dave) and contact information (020 8554 0023 Ext. 101).
- Navigation Tabs:** Phone System, **Users**, Reports, Call Log, Billing, Tools.
- User List:** A table of users with columns for Status, Name, and Department. Users listed include Abby Brown, Ada Smith, Charlie Lee, and Dave Richard.
- Call Handling & Forwarding Pop-up:**
  - User Hours:** The selected tab for configuring call forwarding.
  - Incoming Calls Forward in this Order:** A dropdown menu set to 'Sequentially'.
  - Call Forwarding Table:**

Order	Active	Ring For	Name	Number
1	<input type="checkbox"/>		Admin's Desktop App	N/A
1	<input type="checkbox"/>	1 Ring / 5 Secs	My Desktop App & ...	N/A
2	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Jane Smith Cisco S...	(650) 340-4392
3	<input type="checkbox"/>	4 Rings / 20 Secs	Home	(650) 305-4287
4	<input type="checkbox"/>	4 Rings / 20 Secs	Mobile	Phone Number
5	<input type="checkbox"/>	4 Rings / 20 Secs	Work	Phone Number
- Call Forward for Unreachable Phone Dialog:**
  - Call Redirection:** A slider button set to 'On'.
  - Call Forward Destination:** Radio buttons for 'Extension' (selected) and 'Other Number'.
  - Phone Number:** A text input field for entering the destination number.
  - Buttons:** 'Cancel' and 'Save'.

## User Settings

## User Settings

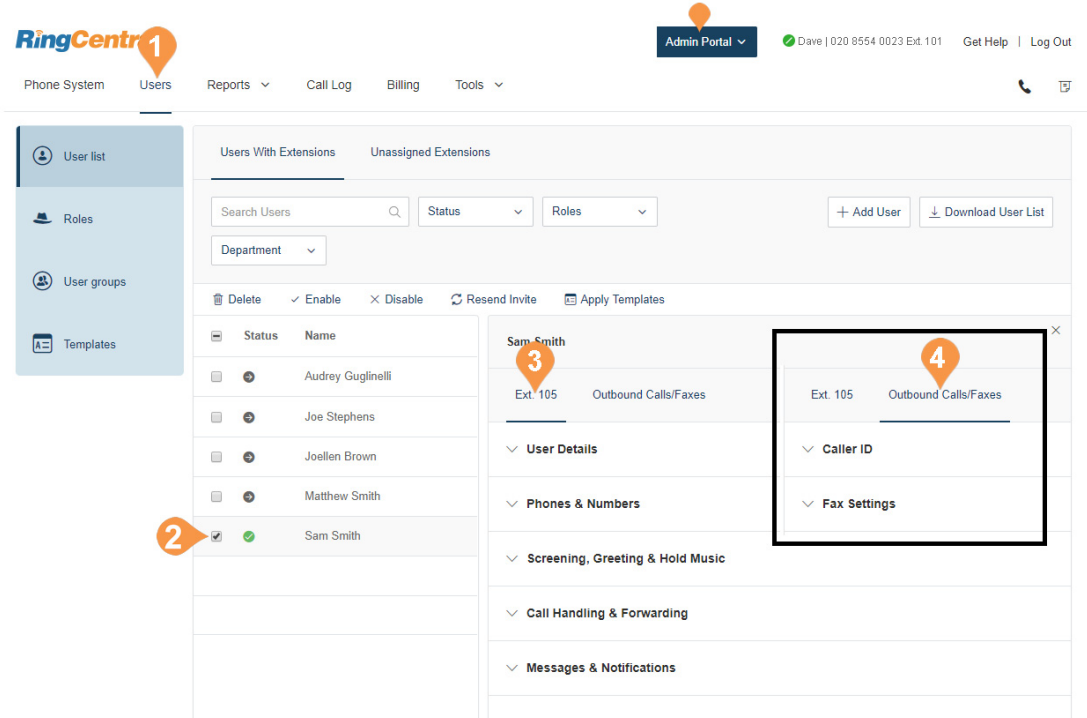
Admins can edit the following user settings:

- 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.



The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is highlighted with callout 1. Below the navigation bar, the 'Users' tab is selected. On the left sidebar, the 'User list' option is highlighted with callout 2. The main content area shows a table of users. The user 'Sam Smith' is selected, indicated by a checkmark and callout 3. To the right of the user list, a settings pane for 'Sam Smith' is open. In this pane, the 'Ext. 105' and 'Outbound Calls/Faxes' options are selected, and a box around the 'Caller ID' and 'Fax Settings' categories is highlighted with callout 4.

Status	Name
<input type="checkbox"/>	Audrey Guglinelli
<input type="checkbox"/>	Joe Stephens
<input type="checkbox"/>	Joellen Brown
<input type="checkbox"/>	Matthew Smith
<input checked="" type="checkbox"/>	Sam Smith

Sam Smith  
Ext. 105 Outbound Calls/Faxes

**User Details**

**Phones & Numbers**

**Screening, Greeting & Hold Music**

**Call Handling & Forwarding**

**Messages & Notifications**

**Caller ID**

**Fax Settings**

## 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.

The image displays two side-by-side screenshots of the RingCentral User Details form for a user named Bob Miller. Both screenshots show the 'Ext. 104' and 'Outbound Calls/Faxes' tabs at the top.

**Left Screenshot (General Tab):**

- First Name:** Bob
- Last Name:** Miller
- Extension Number:** 104
- Contact Phone:** (empty field)
- Email:** bob.miller@example.com
- Use email to log in:** ☒
- Verify Email Uniqueness:** (button)
- Password:** (Change Password button)
- Status:** Enabled (Disable button)
- Record User Name:** Bob Miller (Default) (Edit button)
- Department:** Quality Assurance
- Mobile Phone:** (empty field)
- Footer:** ☐ Yes, I would like to receive information on product education, training materials, etc. (Cancel, Save buttons)

**Right Screenshot (Settings & Permissions Tab):**

- Regional Settings:** GMT-08:00, English (U.S.) (Edit button)
- User Hours:** Custom (Edit button)
- Roles:** Manager (Edit button)
- User Groups:** Call Queue 1, sales group 1 (Edit button)
- Template:** (Apply button)
- Schedule Meetings for Me:** 0 users selected (Edit button)

## 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.

John Smith

Ext. 150

Outbound Calls/Faxes

▼

User Details

Super Admin ⓘ

^

Phones & Numbers

Numbers

Phones

+ Add Direct Number

Number	Type	
(208) 337-3083	Direct	Edit
(860) 446-0747	Direct	Edit

John Smith

Ext. 150      Outbound Calls/Faxes

User Details Super Admin ⓘ

Phones & Numbers

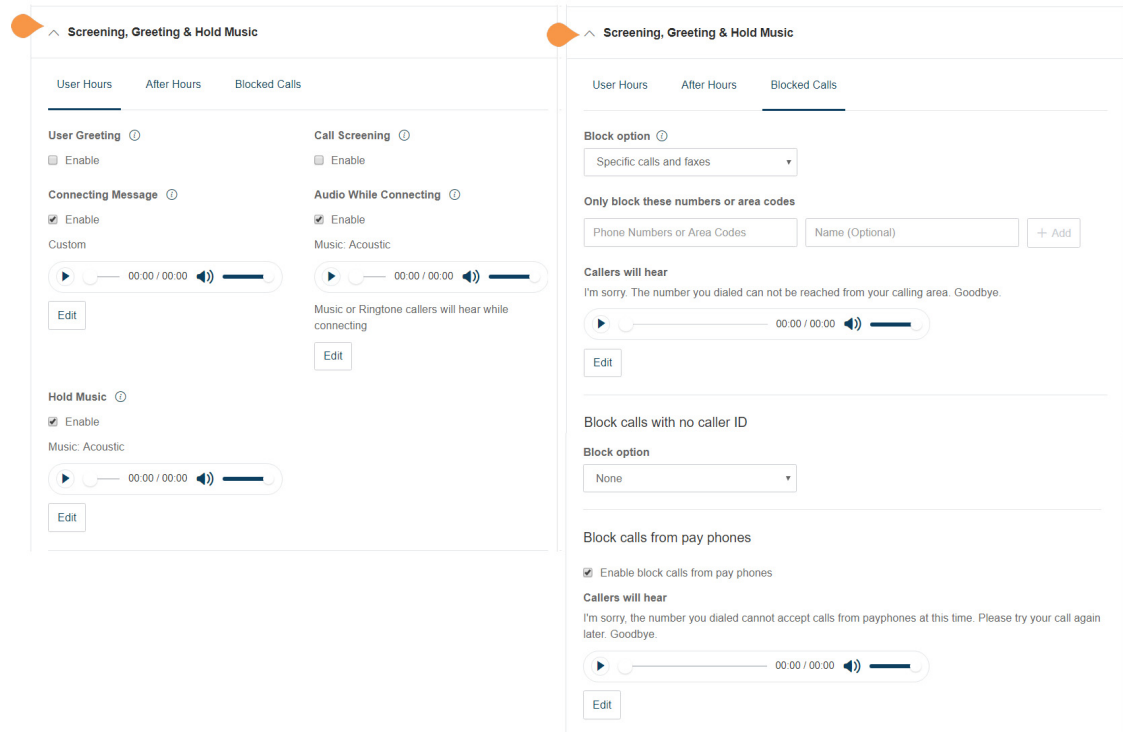
Numbers      Phones

+ Add Phone   ➔ Presence   📄 Intercom ⓘ

Phone Nickname	Phone Type	Number	
John Smith Polycom VVX-311 Gigabit ...	Polycom VVX311	(650) 682-0533	Edit
Cisco SPA-122 ATA	Existing Phone	(205) 538-0301	Edit

## 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.



**Screening, Greeting & Hold Music**

User Hours   After Hours   Blocked Calls

**User Greeting** ⓘ

☐ Enable

**Connecting Message** ⓘ

☒ Enable

Custom

00:00 / 00:00

Edit

**Call Screening** ⓘ

☐ Enable

**Audio While Connecting** ⓘ

☒ Enable

Music: Acoustic

00:00 / 00:00

Music or Ringtone callers will hear while connecting

Edit

**Hold Music** ⓘ

☒ Enable

Music: Acoustic

00:00 / 00:00

Edit

**Screening, Greeting & Hold Music**

User Hours   After Hours   Blocked Calls

**Block option** ⓘ

Specific calls and faxes

**Only block these numbers or area codes**

Phone Numbers or Area Codes   Name (Optional)   + Add

**Callers will hear**

I'm sorry. The number you dialed can not be reached from your calling area. Goodbye.

00:00 / 00:00

Edit

**Block calls with no caller ID**

**Block option**

None

**Block calls from pay phones**

☒ Enable block calls from pay phones

**Callers will hear**

I'm sorry, the number you dialed cannot accept calls from payphones at this time. Please try your call again later. Goodbye.

00:00 / 00:00

Edit

## 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 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.

### Call Handling & Forwarding

User Hours
After Hours
Advanced
Settings

Incoming Calls Forward in this Order

... Sequentially

+ Add Call Forwarding Phone

Create Ring Group
Ungroup

	Order	Active	Ring For	Name	Number
	1	<input checked="" type="checkbox"/>		Admin's Desktop App	N/A
	1	<input checked="" type="checkbox"/>	1 Ring / 5 Secs	My Desktop App & ...	N/A
	2	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Bob Miller Cisco SP...	(205) 538-2244
	3	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Bob Miller VVX-311	(205) 538-0122
	4	<input type="checkbox"/>	4 Rings / 20 Secs	Home	Phone Number
	5	<input type="checkbox"/>	4 Rings / 20 Secs	Mobile	Phone Number
	6	<input type="checkbox"/>	4 Rings / 20 Secs	Work	Phone Number

### Messages & Notifications

User Hours
After Hours
Settings

Take Messages
☒ Enable

Voicemail Greeting
Default

00:00 / 00:00

Edit

Message Recipient
Ext. 104, This extension


Select Extension

## 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.



#### Caller ID

Decide what phone number you want to display as your Caller ID number for outgoing calls. ⓘ

---

##### By Phone

<b>Desktop App</b> (866) 200-8330 - Main Number	<b>Bob Miller VVX-311</b> (866) 200-8330 - Main Number
<a href="#">Edit</a>	<a href="#">Edit</a>
<b>Bob Miller Cisco SPA-122 ATA</b> (866) 200-8330 - Main Number	
<a href="#">Edit</a>	

---

##### By Feature

<b>RingOut from Web</b> (866) 200-8330 - Main Number	<b>RingMe (Outgoing to Caller)</b> (866) 200-8330 - Main Number
<a href="#">Edit</a>	<a href="#">Edit</a>
<b>Call Flip</b> (866) 200-8330 - Main Number	<b>Fax Number</b> (866) 200-8330 - Main Number
<a href="#">Edit</a>	<a href="#">Edit</a>
<b>Additional Desktop App</b> (866) 200-8330 - Main Number	<b>Common Phone</b> (866) 200-8330 - Main Number
<a href="#">Edit</a>	<a href="#">Edit</a>
<b>Alternate Caller ID</b> Not-specified	
<a href="#">Edit</a>	

---


##### Internal calls

☒ Display my extension number for internal calls. ⓘ



## Outbound Fax Settings

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

 **Fax Settings**

**Cover Page Info**

This information will be printed on your fax cover page

<b>Company</b>	<b>Country</b>
<input type="text"/>	<input type="text" value="United States"/>
<b>Street Address</b>	<b>Apartment / Suite #</b>
<input type="text" value="e.g. 120 1st St SW"/>	<input type="text" value="e.g. App. 25"/>
<b>City</b>	<b>State/Province</b>
<input type="text" value="e.g. Alabaster"/>	<input type="text" value="Select State/Province"/>
<b>Zip Code</b>	
<input type="text" value="e.g. 35007"/>	
<b>Fax Number</b> (866) 200-8330 - Main Number	<b>Cover Page</b> Contempo
<input type="button" value="Edit"/>	<input type="button" value="Select"/>

**Faxes Sent via Email**

To enable sending faxes via email from additional email addresses, enter them here. To send a fax via email, send the fax via **faxnumber@rcfax.com**.

Omit cover page when email subject is blank ⓘ

☐ On ☒ Off

**Email Addresses**

Email addresses permitted to send faxes

<input type="text" value="user@mycompany.com"/>	<input type="button" value="Add"/>
---	------------------------------------

## 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.

The image displays two screenshots from the RingCentral Admin Portal. The top screenshot shows the 'Assign users to role' dialog box. It features a search bar, a 'Sites' dropdown menu, and a table of users. The 'Role Domain' dropdown is open, showing options for 'Company', 'Sites', and specific sites like 'Belmont Office', 'California Shop', and 'Canada Toronto'. The bottom screenshot shows the 'User Details' page for 'Ed Wassner' with the role 'Phone System Admin'. It displays a list of roles and a 'Role Domain' section where 'Site(s)' is selected, with 'Edit Sites (2 selected)' link. An 'Administered Sites' dialog box is also shown, listing sites like 'Belmont Office', 'California Shop', 'Canada Toronto', 'Denver Office', 'East Coast Regional Center', and 'Warehouse Florida'.

**Assign users to role**

Search [ ] Sites [v]

Show All | Show Selected (1)

Name	Ext.	Roles	Department	Site	Role Domain
<input type="checkbox"/> John Smith	102	Standard		Company	Company [v]
<input checked="" type="checkbox"/> Dave Richa...	103	Standard (Interna...		Company	California Shop, Canada Toro... [v]

☐ Company  
☒ Sites  
☐ Belmont Office  
☒ California Shop  
☒ Canada Toronto

**User Details**

Roles

- ☐ Super Admin
- ☒ Phone System Admin
- ☐ Standard (International)
- ☐ Billing Admin
- ☐ User Admin
- ☐ Standard
- ☐ Some Admin
- ☐ Manager

Role Domain

- ☐ Company
- ☒ Site(s) [Edit Sites \(2 selected\)](#)

**Administered Sites**

User: Ed Wassner Role: Phone System Admin

Search [ ]

Show All | Show Selected (2)

☒ Site [v]

- ☐ Belmont Office
- ☒ California Shop
- ☒ Canada Toronto
- ☐ Denver Office
- ☐ East Coast Regional Center
- ☐ Warehouse Florida

Total: 6 Show: 25 < 1 >

Cancel Save

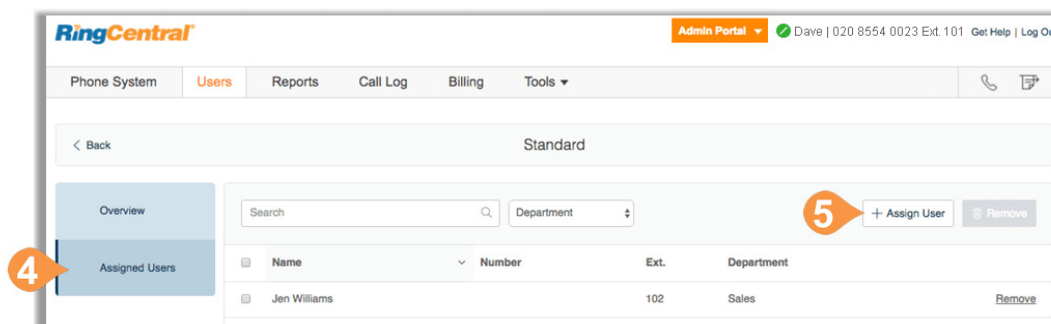
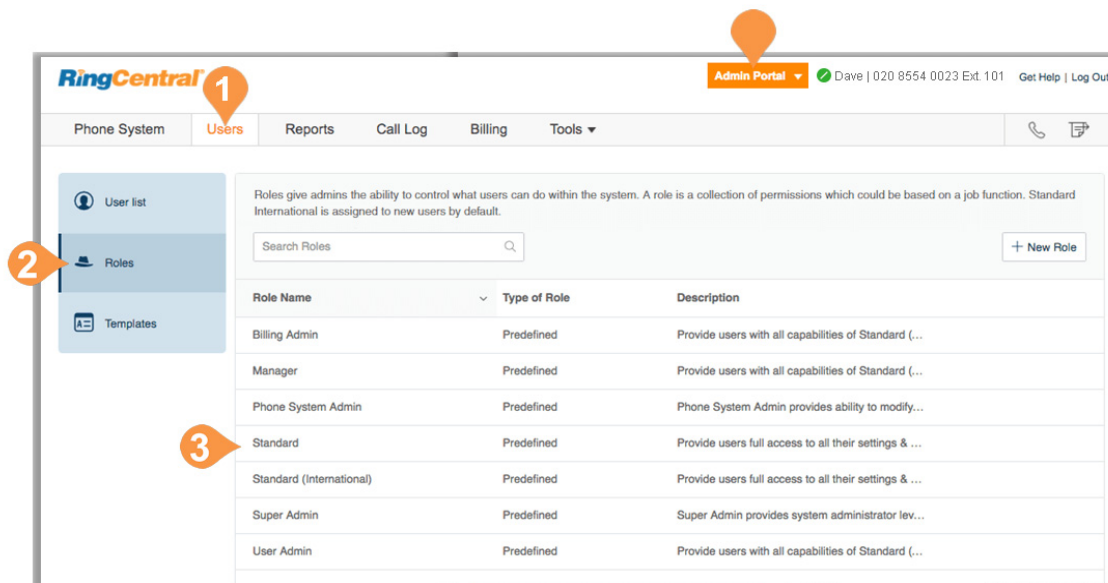
## Assign Users to a Role

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**.

The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible. Below it, the 'Users' tab is selected, indicated by a red circle with the number 1. The 'Users' tab displays a list of users under the 'Users With Extensions' section. A red circle with the number 2 points to the user 'Charlie Wilson' in the list. The user details popup for 'Charlie Wilson (Ext. 103)' is shown, with a red circle with the number 3 pointing to the 'Edit' button next to the 'Roles' field. The 'Roles' field currently shows 'Phone System Admin'.

Status	Name	Number	Ext.	Roles
✓	Bob Johnson	+44 (20) 12000004	104	
✓	Charlie Wilson	(209) 736-0226	103	
✓	David Richards (Super Admin)	(205) 406-0306 ...	101	

**User Details**

User Details: Change name, contact info, user hours, password.

First Name: Charlie

Last Name: Wilson

Record User Name > ⓘ

Contact Phone: ⓘ

Mobile Phone:

Email:

Department: IT

Roles: ⓘ Phone System Admin

Edit

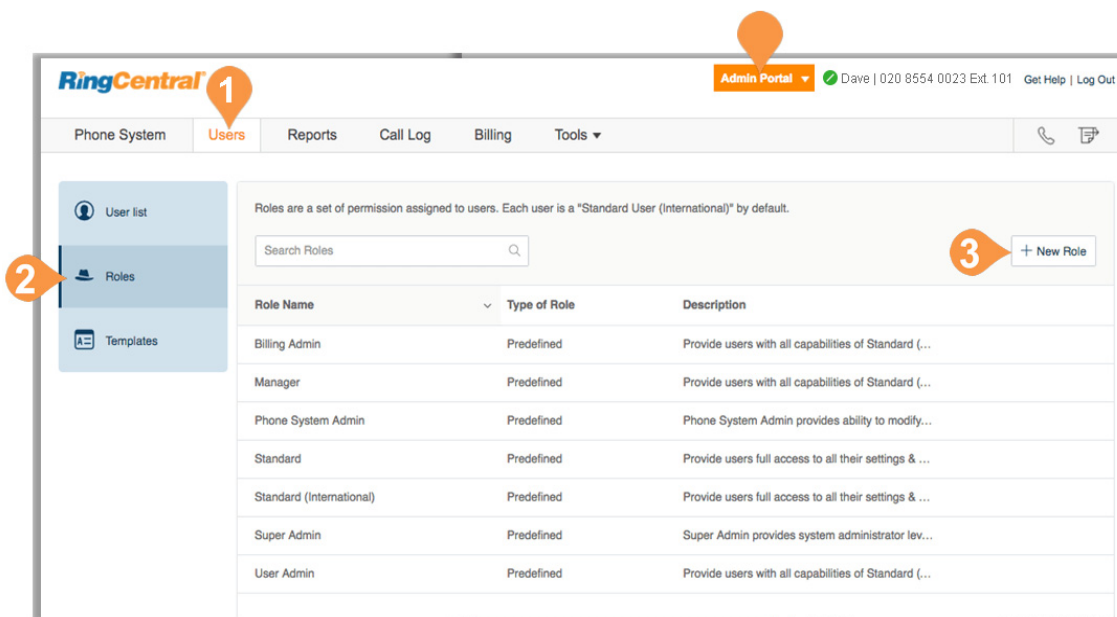
## Create a New Role\*

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.

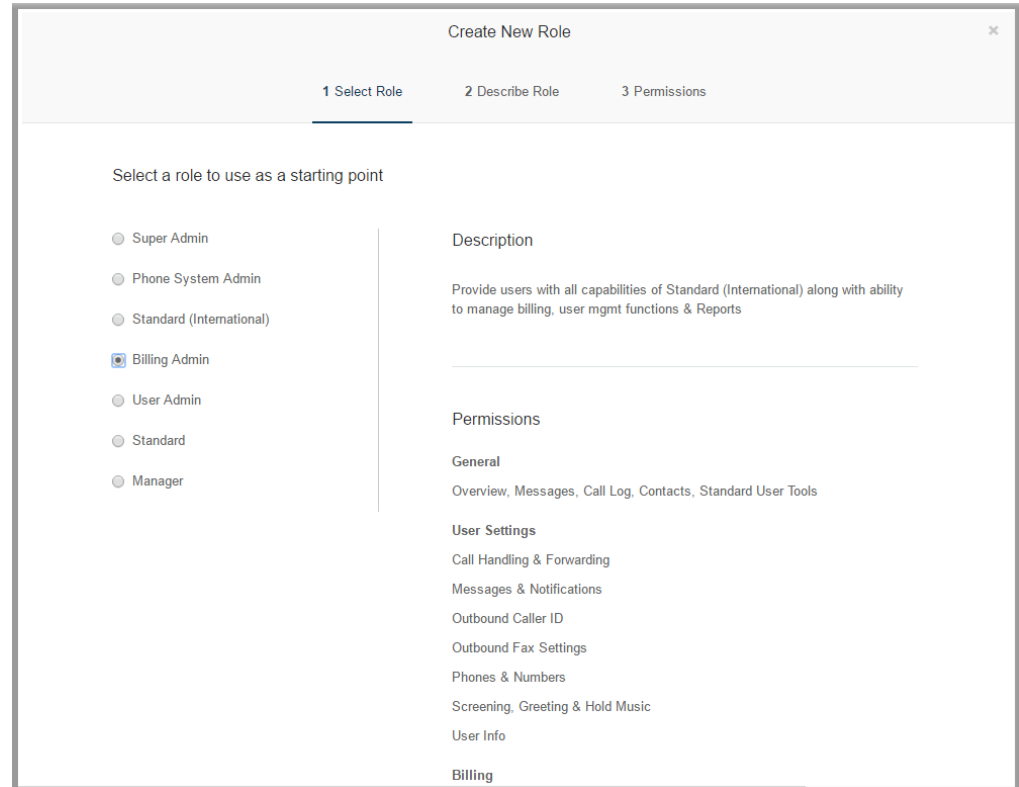


### Step 1: Select Role

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.



Create New Role

1 Select Role 2 Describe Role 3 Permissions

Select a role to use as a starting point

- ☐ Super Admin
- ☐ Phone System Admin
- ☐ Standard (International)
- ☒ Billing Admin
- ☐ User Admin
- ☐ Standard
- ☐ Manager

Description

Provide users with all capabilities of Standard (International) along with ability to manage billing, user mgmt functions & Reports

Permissions

General

Overview, Messages, Call Log, Contacts, Standard User Tools

User Settings

Call Handling & Forwarding

Messages & Notifications

Outbound Caller ID

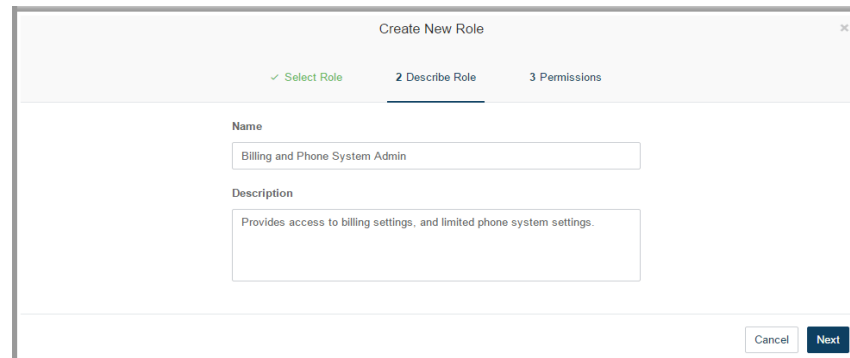
Outbound Fax Settings

Phones & Numbers

Screening, Greeting & Hold Music

User Info

Billing



Create New Role

✓ Select Role 2 Describe Role 3 Permissions

Name

Billing and Phone System Admin

Description

Provides access to billing settings, and limited phone system settings.

Cancel Next



### 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 166..

Create New Role

✓ Select Role

✓ Describe Role

3 Permissions

Select permissions to be assigned to new role

☒ General

Overview, Messages, Call Log, Contacts, Standard User Tools

☐ User Settings

Call Handling & Forwarding

Messages & Notifications

Outbound Caller ID

Outbound Fax Settings

Phones & Numbers

Screening, Greeting & Hold Music

User Info

☒ Phone System

Auto Receptionist

Company Numbers & Info

Groups

Phones & Devices

## 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 168.
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**.

The top screenshot shows the RingCentral Admin Portal with the 'Users' tab selected. The 'Roles' link in the left sidebar is highlighted with an orange circle and the number 3. The main content area shows a table of roles with the following data:

Role Name	Type of Role	Description
Billing Admin	Predefined	Billing functions plus Standard International and Manager functions.
Company Default Role	Custom	This custom role is assigned to all newly-created users.
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 dialing access.
Standard (International)	Predefined	User level access with international dialing access.

The bottom screenshot shows the 'Company Default Role' configuration page. The 'Set as Default' checkbox is highlighted with an orange circle and the number 5. The page shows the role name 'Company Default Role' and its description 'This custom role is assigned to all newly-created users.' The 'Type of Role' is 'Custom'. The 'Permissions' section is expanded, showing the following checked items:

- General
- Overview, Messages, Contacts, Standard User Tools
- User Settings
- Call Handling & Forwarding
- Messages & Notifications
- Outbound Caller ID
- Outbound Fax Settings
- Phones & Numbers
- Screening, Greeting & Hold Music
- User Info

## User Groups

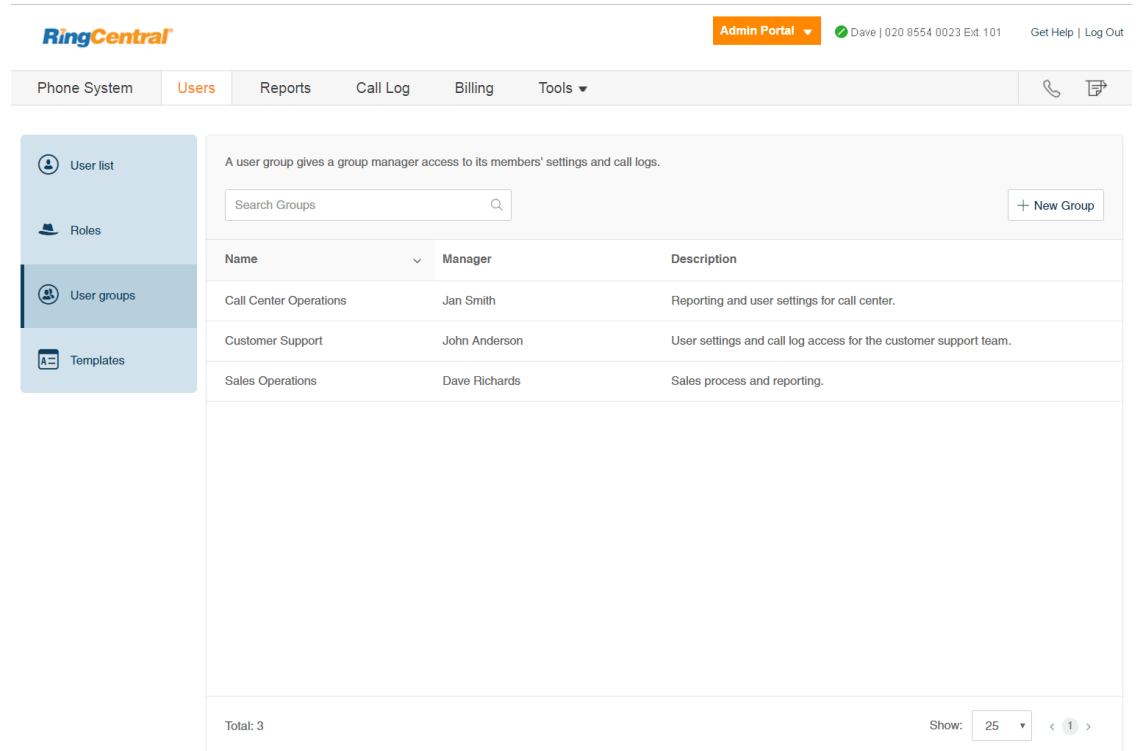
## Manage User Groups\*

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.



The screenshot shows the RingCentral Admin Portal interface. At the top, there's a navigation bar with the RingCentral logo, an 'Admin Portal' dropdown, and user information: 'Dave | 020 8554 0023 Ext. 101' with links for 'Get Help' and 'Log Out'. Below this is a secondary navigation bar with tabs: 'Phone System', 'Users' (highlighted), 'Reports', 'Call Log', 'Billing', and 'Tools'. On the left side, there's a sidebar menu with options: 'User list', 'Roles', 'User groups' (highlighted), and 'Templates'. The main content area is titled 'User groups' and includes a description: 'A user group gives a group manager access to its members' settings and call logs.' Below this is a search bar labeled 'Search Groups' and a '+ New Group' button. A table lists existing user groups:

Name	Manager	Description
Call Center Operations	Jan Smith	Reporting and user settings for call center.
Customer Support	John Anderson	User settings and call log access for the customer support team.
Sales Operations	Dave Richards	Sales process and reporting.

At the bottom of the table area, it shows 'Total: 3' and a pagination control with 'Show: 25' and a page indicator '< 1 >'.

## 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 178.
- **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 178.
- **Accessing Reports for your group members:** Office@Hand Reports help admins and user group managers optimise 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 187.

## Create a User Group

When you create a user group, you organise 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 163. .

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.

The screenshot illustrates the 'Create User Group' process in the RingCentral Admin Portal. The interface includes a top navigation bar with the 'Admin Portal' link and a 'Users' tab. A sidebar on the left contains links for 'User list', 'Roles', 'User groups', and 'Templates'. The main content area shows a list of existing user groups with columns for Name, Manager, and Description. A modal window titled 'Create User Group' is open, displaying a progress bar with three steps: 1. Describe User Group, 2. Add Members, and 3. Select Group Manager. Step 1 is currently active, showing input fields for 'Name' (Sales Operations) and 'Description' (Sales process and reporting). A 'Next' button is located at the bottom right of the modal.

Name	Manager	Description
Call Center Operations	Jan Smith	Reporting and user settings for call center.
Customer Support	John Anderson	User settings and call log access for the customer support team.
Sales Operations	Dave Richards	Sales process and reporting.

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.

Create User Group

Describe User Group

2 Add Members

3 Select Group Manager

Search Users

All Departments

Show All | Show Selected (3)

<input checked="" type="checkbox"/>	Name	Ext.	Roles	Department
<input checked="" type="checkbox"/>	Dave Richards	101	Super Admin	
<input checked="" type="checkbox"/>	Jan Smith	102	Standard (International)	
<input checked="" type="checkbox"/>	John Anderson	103	Standard (International)	

Total: 3

Show: 25

< 1 >

Cancel

Next

Create User Group

Describe User Group

Add Members

3 Select Group Manager

Search Users

All Departments

The group manager will have access to the settings and call logs of the group members.

Select	Name	Ext.	Roles	Department
<input checked="" type="radio"/>	Dave Richards	101	Super Admin	
<input type="radio"/>	Jan Smith	102	Standard (International)	
<input type="radio"/>	John Anderson	103	Standard (International)	

Total: 3

Show: 25

< 1 >

Cancel

Done

User Group Created

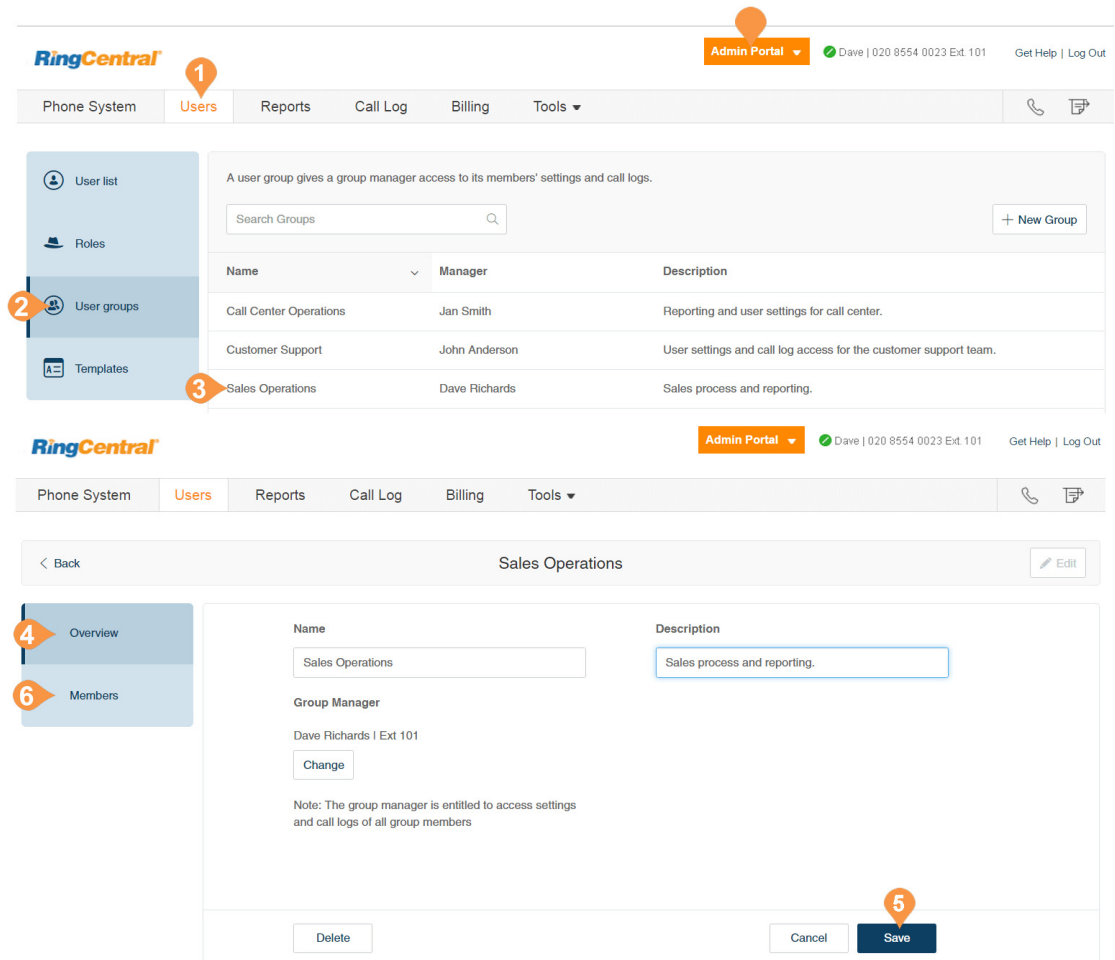
Congratulations! The user group, Sales Operations has been created successfully.

## 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.



**RingCentral** Admin Portal | Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out

Phone System **Users** Reports Call Log Billing Tools

User list Roles **User groups** Templates

A user group gives a group manager access to its members' settings and call logs.

Search Groups [+ New Group](#)

Name	Manager	Description
Call Center Operations	Jan Smith	Reporting and user settings for call center.
Customer Support	John Anderson	User settings and call log access for the customer support team.
Sales Operations	Dave Richards	Sales process and reporting.

**RingCentral** Admin Portal | Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out

Phone System **Users** Reports Call Log Billing Tools

< Back Sales Operations [Edit](#)

**Overview** Members

Name: Sales Operations Description: Sales process and reporting.

Group Manager: Dave Richards | Ext 101 [Change](#)

Note: The group manager is entitled to access settings and call logs of all group members

[Delete](#) [Cancel](#) [Save](#)



# 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.

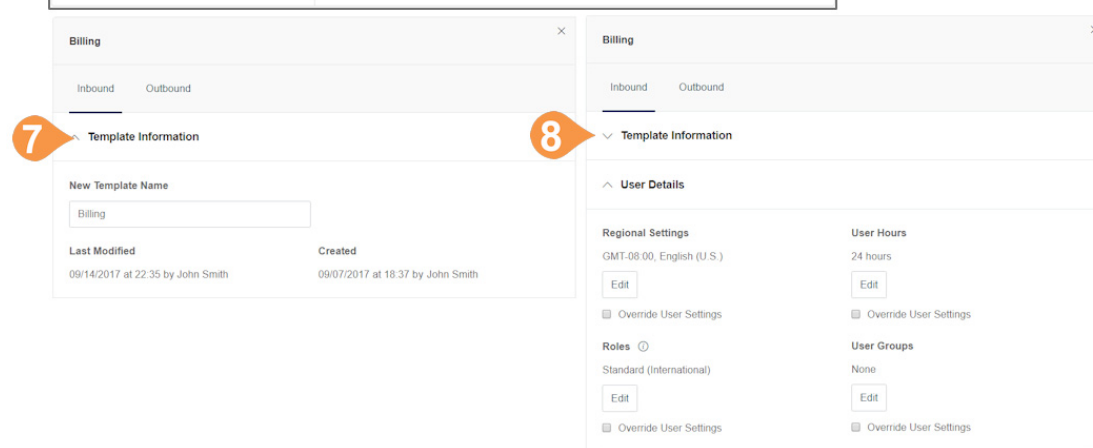
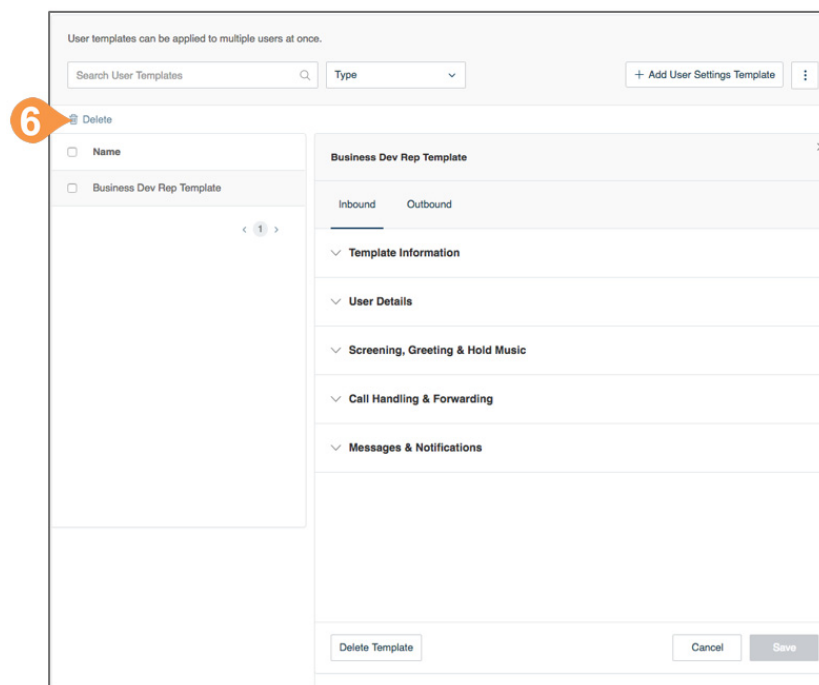
### Create a Template for User Settings

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.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' header is visible with a user profile 'Dave | 020 8554 0023 Ext. 101'. The navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar shows 'User list', 'Roles', 'User groups', and 'Templates'. The 'Users' tab is active, and the 'Templates' sub-tab is selected. The main content area shows the 'Users With Extensions' section with search filters and a table of users. A modal window titled 'Add User Settings Template' is open, showing a list of existing templates and a form to create a new one. The modal includes a search bar, a 'Type' dropdown, and a '+ Add User Settings Template' button. The list of templates includes 'FLOWERS INC', 'Halloween', 'Lunch Time', 'Bastille day', 'Columbus Day', 'Sample', 'Customer Service', 'Billing', and 'Business Dev Rep Template'. The 'Sample' template is highlighted. The modal also includes a 'New Template Name' field with the value 'Billing' and a 'Save' button.

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.

Billing

Inbound

Outbound

Template Information

User Details

9

Screening, Greeting & Hold Music

User Greeting ⓘ

☐ Enable
 ☐ Override User Settings

Connecting Message ⓘ

☒ Enable
 

Default

▶

00:00 / 00:00

◀◀

Default Message: "Please hold while I try to connect you."

Edit

☐ Override User Settings

Hold Music ⓘ

☒ Enable
 

Music: Acoustic

▶

00:00 / 00:00

◀◀

Edit

☐ Override User Settings

Call Screening ⓘ

☐ Enable
 ☐ Override User Settings

Audio While Connecting ⓘ

☒ Enable
 

Music: Acoustic

▶

00:00 / 00:00

◀◀

Music or Ringtone callers will hear while connecting

Edit

☐ Override User Settings

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**.

10

Billing

Inbound

Outbound

▼ Template Information

▼ User Details

▼ Screening, Greeting & Hold Music

▼ Call Handling & Forwarding

Desktop Apps & Smartphones

☒ Notify my Desktop app and Smartphone ⓘ

Wait Time

Select the time before forwarding begins

1 Ring / 5 Secs ▼

☐ Override User Settings

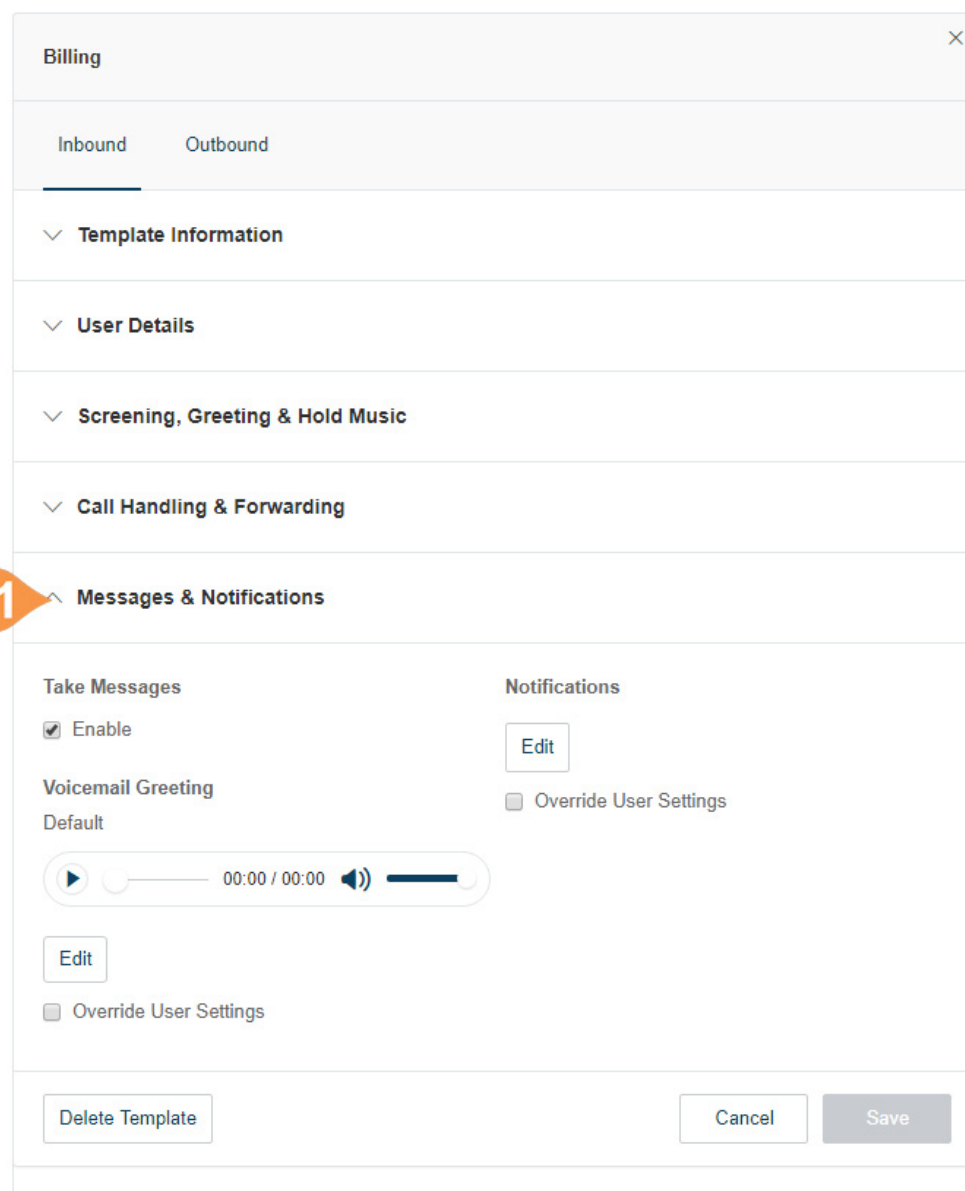
Incoming Call Information

Displayed Incoming Caller ID

Edit

☐ Override User 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.



**Billing** [X]

**Inbound** **Outbound**

▼ **Template Information**

▼ **User Details**

▼ **Screening, Greeting & Hold Music**

▼ **Call Handling & Forwarding**

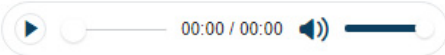
**11** ▼ **Messages & Notifications**

**Take Messages**

☒ Enable

**Voicemail Greeting**

Default

 00:00 / 00:00

**Edit**

☐ Override User Settings

**Notifications**

**Edit**

☐ Override User Settings

**Delete Template** **Cancel** **Save**

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**.

Customer Service

Inbound

Outbound

Caller ID

Decide what phone number you want to display as your Caller ID number for outgoing calls. ⓘ

☐ Override User Settings

By Phone

(866) 200-8330 - Main Number

Edit

By Feature

RingOut from Web

(866) 200-8330 - Main Number

Edit

RingMe (Outgoing to Caller)

(866) 200-8330 - Main Number

Edit

Call Flip

(866) 200-8330 - Main Number

Edit

Fax Number

(866) 200-8330 - Main Number

Edit

Internal calls

☒ Display my extension number for internal calls. ⓘ

Fax Settings

Cover Page Info

This information will be printed on your fax cover page

☐ Override User Settings

Company

Country

Select Country ▼

Street Address

e.g. 120 1st St SW

Apartment / Suite #

e.g. App. 25

City

e.g. Alabaster

State/Province

Select State/Province ▼

Zip Code

e.g. 35007

Fax Number

(866) 200-8330 - Main Number

Edit

Cover Page

None

Select

Faxes Sent via Email

To enable sending faxes via email from additional email addresses, enter them here. To send a fax via email, send the fax via [faxnumber@rcfax.com](mailto:faxnumber@rcfax.com).

Omit cover page when email subject is blank ⓘ

☐ On
 ☒ Off

Delete Template

Cancel

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**.

The screenshot illustrates the process of creating a Call Handling Template in the RingCentral Admin Portal. The interface is divided into a left sidebar and a main content area.

**Step 1:** The **Admin Portal** header is visible at the top right. The **Users** tab is selected in the top navigation bar.

**Step 2:** In the left sidebar, the **Templates** option is highlighted.

**Step 3:** In the main content area, the **+ Add Call Handling Template** button is clicked.

**Step 4:** The **Add Call Handling Template** modal is open. The **1 Name Template** tab is active. A descriptive name, "Weekend schedule", is entered in the **New Template Name** field.

**Step 5:** The **Next** button is clicked to proceed to the next step.

**Step 6:** The **2 Define Conditions** tab is active. The **Caller ID** dropdown is set to **None**. The **Date and/or Time** dropdown is also set to **None**.

**Step 7:** The **Next** button is clicked to proceed to the next step.

**Step 8:** The **3 Define Call Handling** tab is active. The **Select action to take when incoming calls match this rule** section shows the **Take Messages** option selected. The **Take Messages** sub-section is expanded, showing the **Enable** checkbox checked, the **Voicemail Greeting** set to **Default**, and the **Message Recipient** set to **This Extension**.

**Step 9:** The **Save** button is clicked to complete the template creation.



## 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.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, a user profile (Dave | 020 8554 0023 Ext. 101), and links to Admin Portal, Get Help, and Log Out. The main navigation menu on the left includes Phone System, Users, Reports, Call Log, Billing, and Tools. The 'Users' tab is active, showing a list of users with checkboxes for selection. A 'Select Template' modal is open, displaying a list of templates. The 'Billing' template is selected. The modal also includes a search bar, a 'Type' dropdown, and a 'Show' dropdown. The 'Apply Template' button is highlighted at the bottom right of the modal.

**Users With Extensions**

Search Users  Status  Roles  + Add User Download User List

Department

Delete Enable Disable Resend Invite **Apply Templates**

Status	Name	Number	Ext.	Roles	Department	Msg.	
<input checked="" type="checkbox"/>	Bob Miller	(205) 538-0122...	104	Manager	Quality Assurance	0 / 0	Disable
<input checked="" type="checkbox"/>	Debbie Smith		105	User Admin		0 / 0	Disable

**Select Template** x

Search  Type

Name	Type
All Saints Day	Call Handling
Bastille day	Call Handling
<input checked="" type="radio"/> Billing	User Settings
Lunch Time	Call Handling
Sample	User Settings
Xmas Patry	User Settings

Total: 12 Show: 25 < 1 >

Cancel **Apply Template**

# Reports

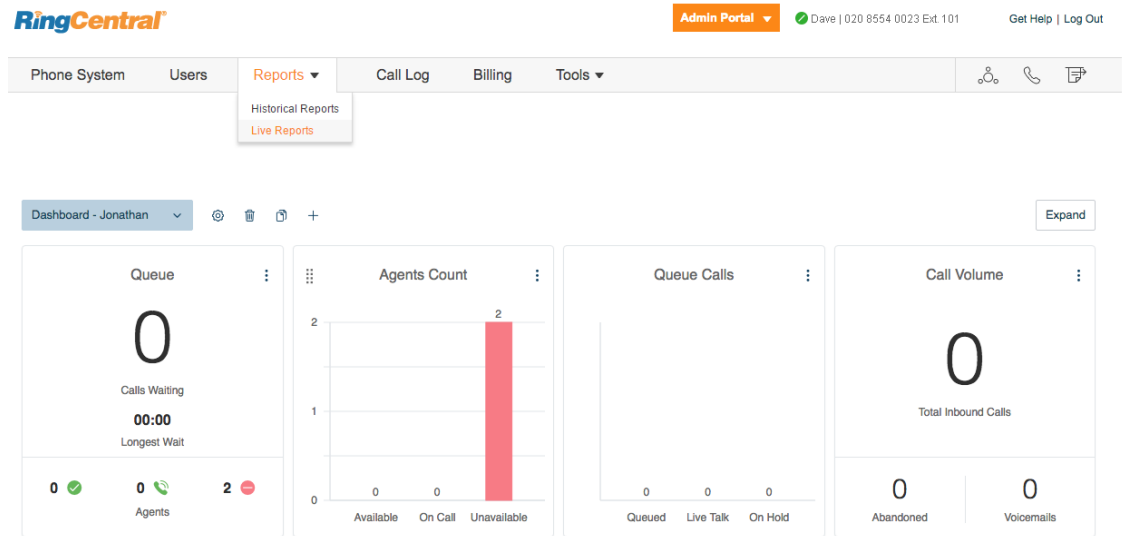
## Live Reports

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 customise 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:

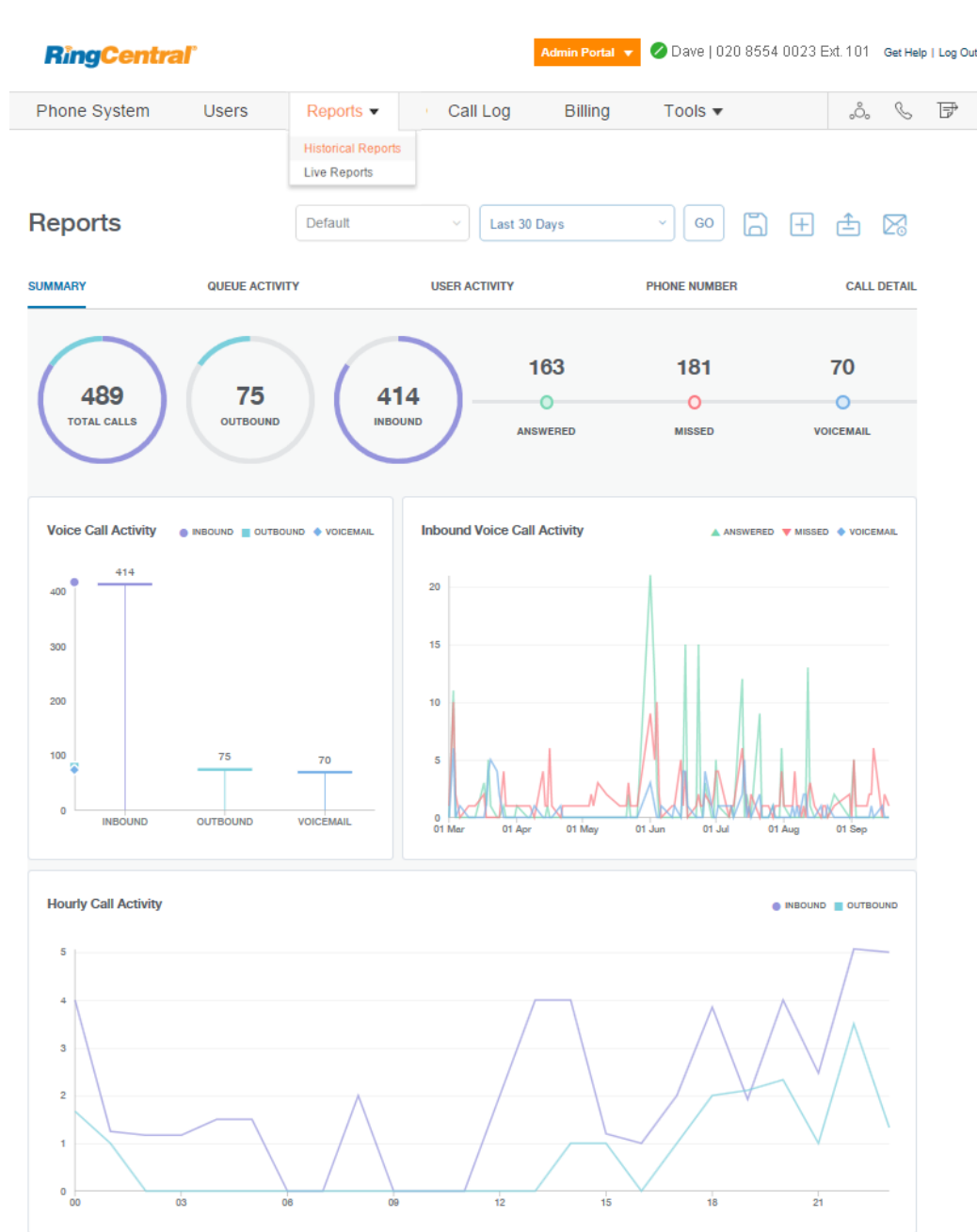
- [Live Reports User Guide](#)
- [RingCentral Live Reports: Overview](#)
- [Live Reports FAQ](#)



## Historical Reports

RingCentral Reports helps admins optimise 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 summarises 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 summarises 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 optimise the calls for best results.
- The **Phone Number** report summarises 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.)

**RingCentral** Admin Portal Dave | 020 8554 0023 Ext. 101 Get Help | Log Out

Phone System Users **Reports** Call Log Billing Tools

**Reports** Default Last 30 Days GO [Icons: Save, Add View, Export, Print]

**SUMMARY** **QUEUE ACTIVITY** **USER ACTIVITY** PHONE NUMBER CALL DETAIL

**Filters** [EXPAND]

User: Multiple Call Type: All

Avg. Calls/User: 1,431 Avg. Call Duration/User: 18:28:29

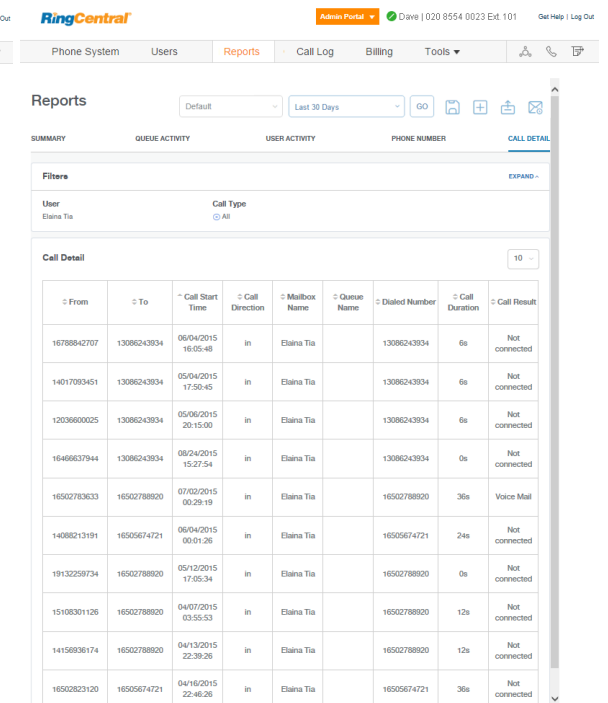
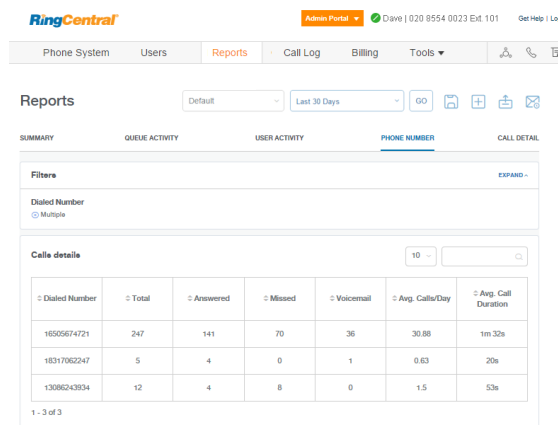
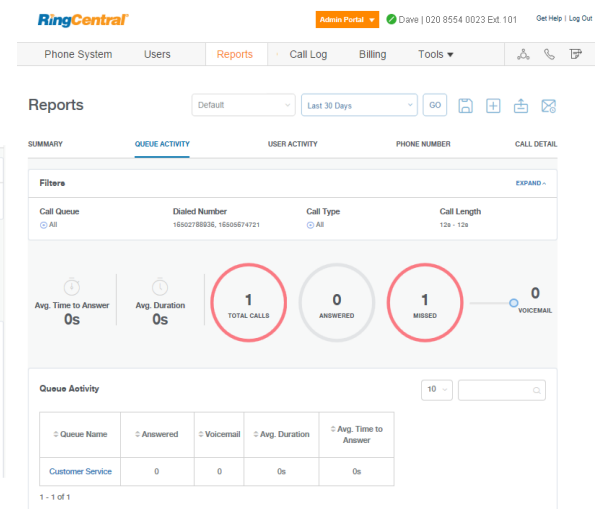
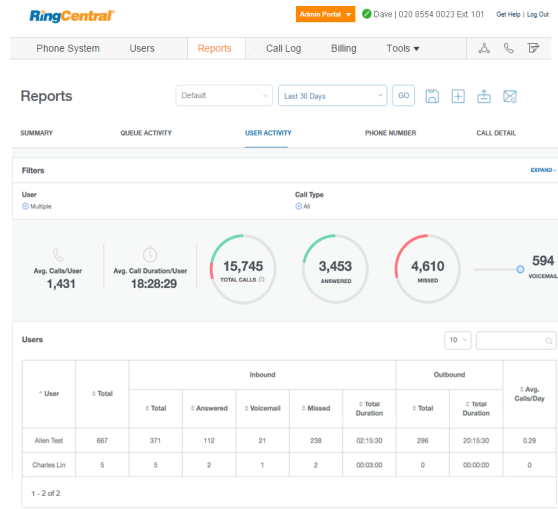
15,745 TOTAL CALLS 3,453 ANSWERED 4,610 MISSED 594 VOICEMAIL

**Users** 10 [Search]

User	Total	Inbound					Outbound		Avg. Calls/Day
		Total	Answered	Voicemail	Missed	Total Duration	Total	Total Duration	
Allen Test	667	371	112	21	238	02:15:30	296	20:15:30	0.29
Charles Lin	5	5	2	1	2	00:03:00	0	00:00:00	0

1 - 2 of 2

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



## Call Log

## Call Log Description

The Call Log provides reports on inbound and outbound calls and faxes for the company number and specified extensions. Select the time period, type of call (inbound or outbound), blocked calls, or recorded calls. You can have the call log delivered to an email address daily, weekly, or monthly on specified day.

In the **Type** column you will see icons for the following types of calls:

 **Inbound Call**

 **Outbound Call**

 **Missed Call**

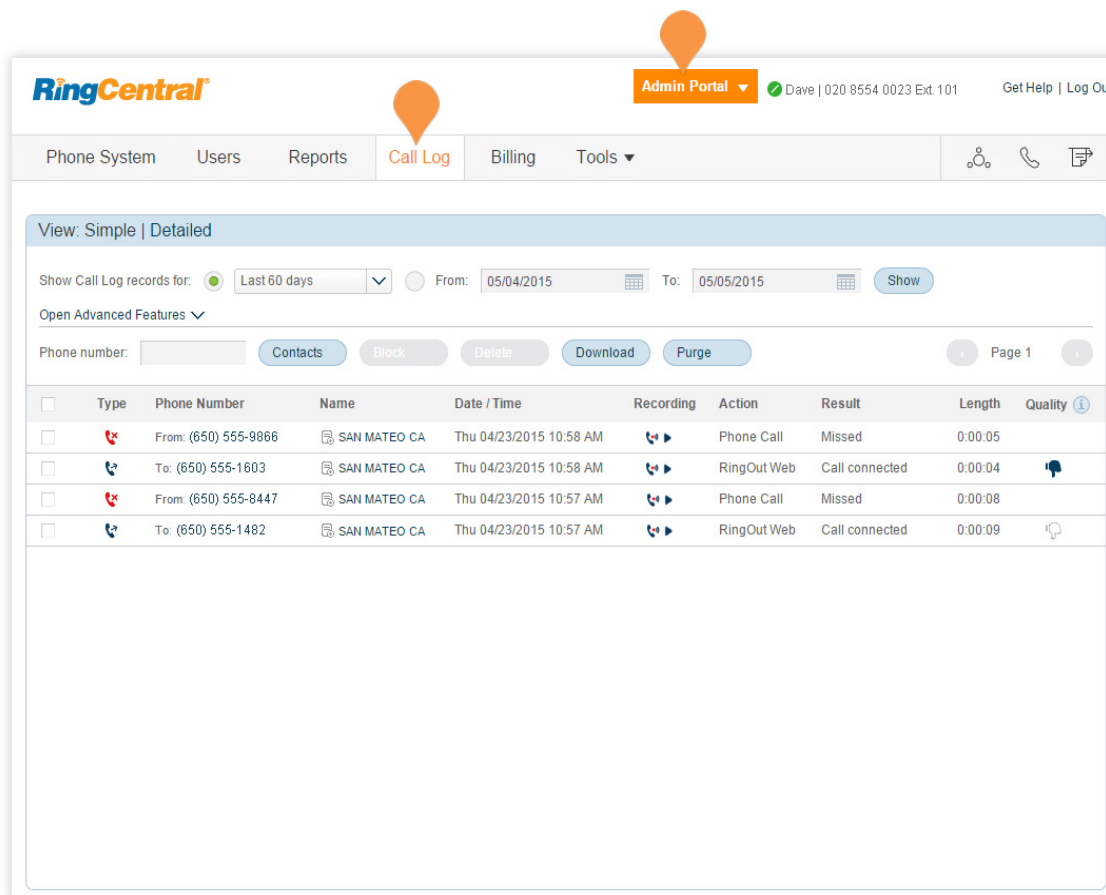
In the **Recording** column, you will see an icon if the call has been recorded. Hover over the icon to listen to the recording.







 Listen to a call recording

Administrators can enable the bad call quality indicator in the RingCentral Admin Portal for an account. By default, the feature is disabled. If this feature is enabled, and you were not satisfied with the call quality of a connected call, you can mark the thumbs down icon in the **Quality** column in your Call Log.

 Click to mark as a bad call

 Marked as a bad call



Type	Phone Number	Name	Date / Time	Recording	Action	Result	Length	Quality
From: (650) 555-9866	SAN MATEO CA	Thu 04/23/2015 10:58 AM		Phone Call	Missed	0:00:05		
To: (650) 555-1603	SAN MATEO CA	Thu 04/23/2015 10:58 AM		RingOut Web	Call connected	0:00:04		
From: (650) 555-8447	SAN MATEO CA	Thu 04/23/2015 10:57 AM		Phone Call	Missed	0:00:08		
To: (650) 555-1482	SAN MATEO CA	Thu 04/23/2015 10:57 AM		RingOut Web	Call connected	0:00:09		



# Billing

## Billing

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

**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.

The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is highlighted with callout 1. Below the navigation bar, the 'Billing' tab is selected with callout 2. In the left sidebar, the 'Service Plan' option is highlighted with callout 3. The main content area displays the 'Service Plan' details for 'RingCentral Office Enterprise 20 - 99 line'. The 'Change Edition' button is highlighted with callout 3a. The 'Change billing cycle' button is highlighted with callout 4. Two pop-up windows are shown on the right: 'Change Edition' (callout 3a) and 'Change Billing Cycle' (callout 4a). The 'Change Billing Cycle' pop-up shows the 'Monthly' plan as the 'Current Plan' and the 'One Year Subscription' as the 'Recommended' option. Callout 3b points to the 'OK' button in the 'Change Edition' pop-up.

## 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**.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing' (highlighted with callout 1), and 'Tools'. The 'Billing' tab is active, showing a sidebar with 'Service Plan' (callout 2), 'Payment Method', 'International Calling', 'Meetings', 'Device Orders', and 'Cost Center Management'. The main content area displays the 'Service Plan' details for 'RingCentral Office Enterprise 2 - 19 line', including a 'Change Edition' button, billing plan (\$119.98 for 1 month), account credit (\$0.00), billing cycle (04/22/2015 - 05/21/2015), and next billing date (05/22/2015). Below this, there are sections for 'Additional Services', 'Additional Local Numbers', 'Additional Toll-Free Minute Bundle', 'Additional Phones', and 'Common Phones'. At the bottom, there are links for 'Billing History' (callout 4), 'Auto-Purchase' (callout 5), and 'Cancel Service Plan' (callout 6).

Callout 3 points to the 'Usage Info' link in the sidebar. Callout 3a shows the 'Usage Info' pop-up, which displays 'Unlimited Usage: 0 minutes', 'Included Credits: \$390.00 available (10,000 plan minutes)', 'Included International Outbound Landline - Zone 1 - EMEA Usage: 0 used of 20,000 minutes (per month)', 'International Calling Credit Bundle: \$300.00 available', and 'Additional Bundles' including 'Additional Toll-Free Minute Bundle' and 'International Calling Credit Bundle'. Callout 3b points to the 'Add' button for the 'Additional Toll-Free Minute Bundle', and callout 3c points to the 'Change' button for the 'International Calling Credit Bundle'.

Callout 4a shows the 'Billing History' pop-up, which displays a table of billing history with columns for Date, Reference #, Description, and Amount. Callout 4b points to the 'View Full Billing History' link. Callout 4c points to the checkbox for 'Send me my billing statement via email', and callout 4d points to the 'Done' button.

Callout 5a shows the 'Auto-Purchase' pop-up, which displays the 'Calling Credits Package' selection (20.00 or 100.00) and the 'Select Cost Center Code' field. Callout 5b points to the 'Main' dropdown menu, which shows options like 'Customer Service', 'Sales', 'Shipping', 'Training', and 'Warehouse'. Callout 6a shows the 'Cancel Service Plan' pop-up, which asks for confirmation to cancel the service plan and lists the consequences of cancellation. Callout 6b points to the 'Close' button.

## 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.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information 'Dave | 020 8554 0023 Ext. 101'. The main navigation tabs are Phone System, Users, Reports, Call Log, Billing (highlighted with a red circle 1), and Tools. The left sidebar contains links for Service Plan (highlighted with a red circle 2), Payment Method, International Calling, Meetings, Device Orders, and Cost Center Management. The main content area is divided into three panels: Service Plan, Usage Info, and Active User Extensions. The Service Plan panel shows details for 'RingCentral Office Enterprise 2 - 19 line', including billing plan, cycle, and next billing date. The Usage Info panel shows 'Unlimited Usage: 15 minutes' and 'Included Credits: \$390.00 available'. The Active User Extensions panel shows the 'Active User Extensions' section with a 'Show History' button. Below this, the 'Active Virtual Extensions History' panel is shown with search parameters (Renewal Period: 03/04/2017 - 04/03/2017, Extension: Ext. 103, Name: Ada Jarvis, Number of External Calls: 2) and a 'Show' button. At the bottom, there is a table with columns: Type, Direction, From, To, Extension, Forwarded To, Name, Date, Time, Action, Action Result, Result Description, Duration, Included, and Purchased. The table contains several rows of call data.

Type	Direction	From	To	Extension	Forwarded To	Name	Date	Time	Action	Action Result	Result Description	Duration	Included	Purchased
Voice	Outgoing	(867) 654-3210	103 - Ada Jarvis	103 - Ada Jarvis	(777) 777-7777	Ada Jarvis	Mon-03/09/2017	4:34 PM	RingOut Web	Call connected	The call connected to and was accepted by this number.	0:00:36	0	-
Voice	Outgoing	(867) 654-3210	103 - Ada Jarvis	103 - Ada Jarvis	(777) 777-7777	Ada Jarvis	Mon-03/09/2017	4:34 PM	RingOut Web	Call connected	The call connected to and was accepted by this number.	0:00:36	0	-
Voice	Outgoing	(867) 654-3210	103 - Ada Jarvis	103 - Ada Jarvis	(777) 777-7777	Ada Jarvis	Mon-03/09/2017	4:34 PM	RingOut Web	Call connected	The call connected to and was accepted by this number.	0:00:36	0	-
Voice	Outgoing	(867) 654-3210	103 - Ada Jarvis	103 - Ada Jarvis	(777) 777-7777	Ada Jarvis	Mon-03/09/2017	4:34 PM	RingOut Web	Call connected	The call connected to and was accepted by this number.	0:00:36	0	-
Voice	Outgoing	(867) 654-3210	103 - Ada Jarvis	103 - Ada Jarvis	(777) 777-7777	Ada Jarvis	Mon-03/09/2017	4:34 PM	RingOut Web	Call connected	The call connected to and was accepted by this number.	0:00:36	0	-
Voice	Outgoing	(867) 654-3210	103 - Ada Jarvis	103 - Ada Jarvis	(777) 777-7777	Ada Jarvis	Mon-03/09/2017	4:34 PM	RingOut Web	Call connected	The call connected to and was accepted by this number.	0:00:36	0	-

## 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**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible, along with user information 'Dave | 020 8554 0023 Ext. 101' and links for 'Get Help' and 'Log Out'. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing' (highlighted with an orange circle 1), and 'Tools'. On the left sidebar, 'Payment Method' is selected (highlighted with an orange circle 2). The main content area shows the 'Payment Method' details (highlighted with an orange circle 3) for a Visa card. Below the details is an 'Edit Payment Method' button (highlighted with an orange circle 4). An inset shows the 'Edit Payment Method' form with fields for Card Type, Card Number, Expiration Date, First Name, Last Name, Contact Phone, Contact Email, Address 1, Address 2, City, State/Province, Zip/Postal Code, and Country. The 'Save' button is at the bottom right of the form.

**Payment Method Details:**

Card Type:	Visa
Card Number:	XXXX-XXXX-XXXX-1111
Expiration Date:	01/2017
First Name:	Dave
Last Name:	Richards
Contact Phone:	(650) 555-2009
Contact Email:	dave.richards@mycompany.com
Address 1:	123 Main Street
Address 2:	
City:	San Mateo
State/Province:	California
Zip/Postal Code:	94404
Country:	United States

**Edit Payment Method Form:**

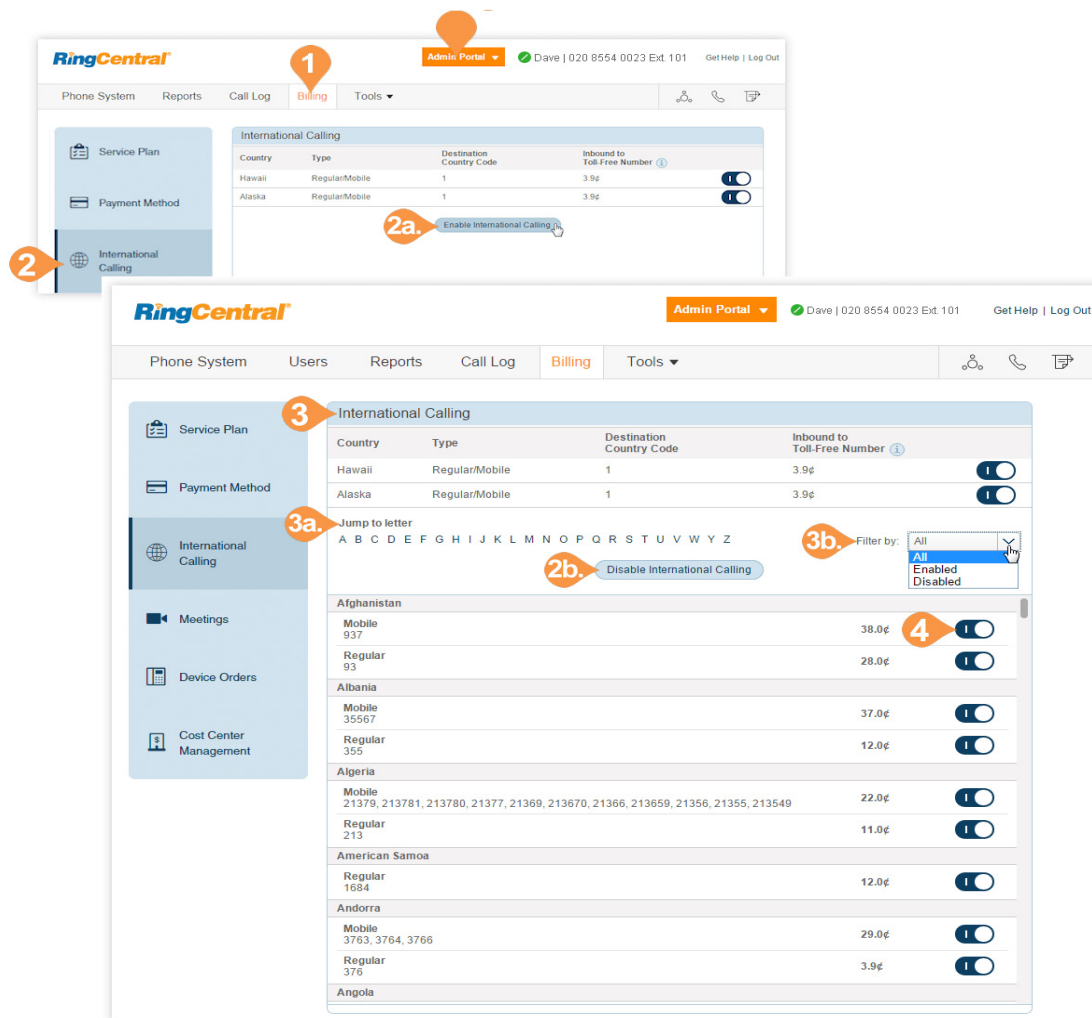
Card Type:	Visa
Card Number:	
Verification Code:	
Expiration Date:	January 2017
First Name:	Dave
Last Name:	Richards
Contact Phone:	(650) 555-2009
Contact Email:	dave.richards@mycompany.com
Address 1:	123 Main Street
Address 2:	
City:	San Mateo
State/Province:	California
Zip/Postal Code:	94404
Country:	United States

**Buttons:** Cancel, 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.



## Meetings

The Meetings section 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 4 people per meeting, Premium edition supports 50 people per meeting and Ultimate edition supports 75 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.

**RingCentral** Admin Portal | Dave | 020 8554 0023 Ext.101 | Get Help | Log Out

Phone System | Users | Reports | Call Log | **Billing** | Tools

Service Plan | Payment Method | International Calling | **Meetings** | Device Orders

Large Meeting | RingCentral Webinar | RingCentral Rooms | Room Connector

Search | All | + Add Licenses

To remove licenses, please call Customer Support.

License Type	Assigned To	Ext.	Date Added	
Large Meeting 100	N/A	N/A	01/24/2017	Assign
Large Meeting 100	N/A	N/A	01/12/2017	Assign

Total: 2 | Show: 25 | < 1 >

**Add Large Meeting Licenses**

1 Add License | 2 Confirm Order | 3 Order Confirmation

License	Price	# of Licenses
Large Meeting 100 License	\$400.00 Annually	- 0 +
Large Meeting 200 License	\$900.00 Annually	- 0 +

License | Sub-total\*

\*Total charges do not include taxes, fees and prorate.

\$0.00

Cancel | Next



## 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.

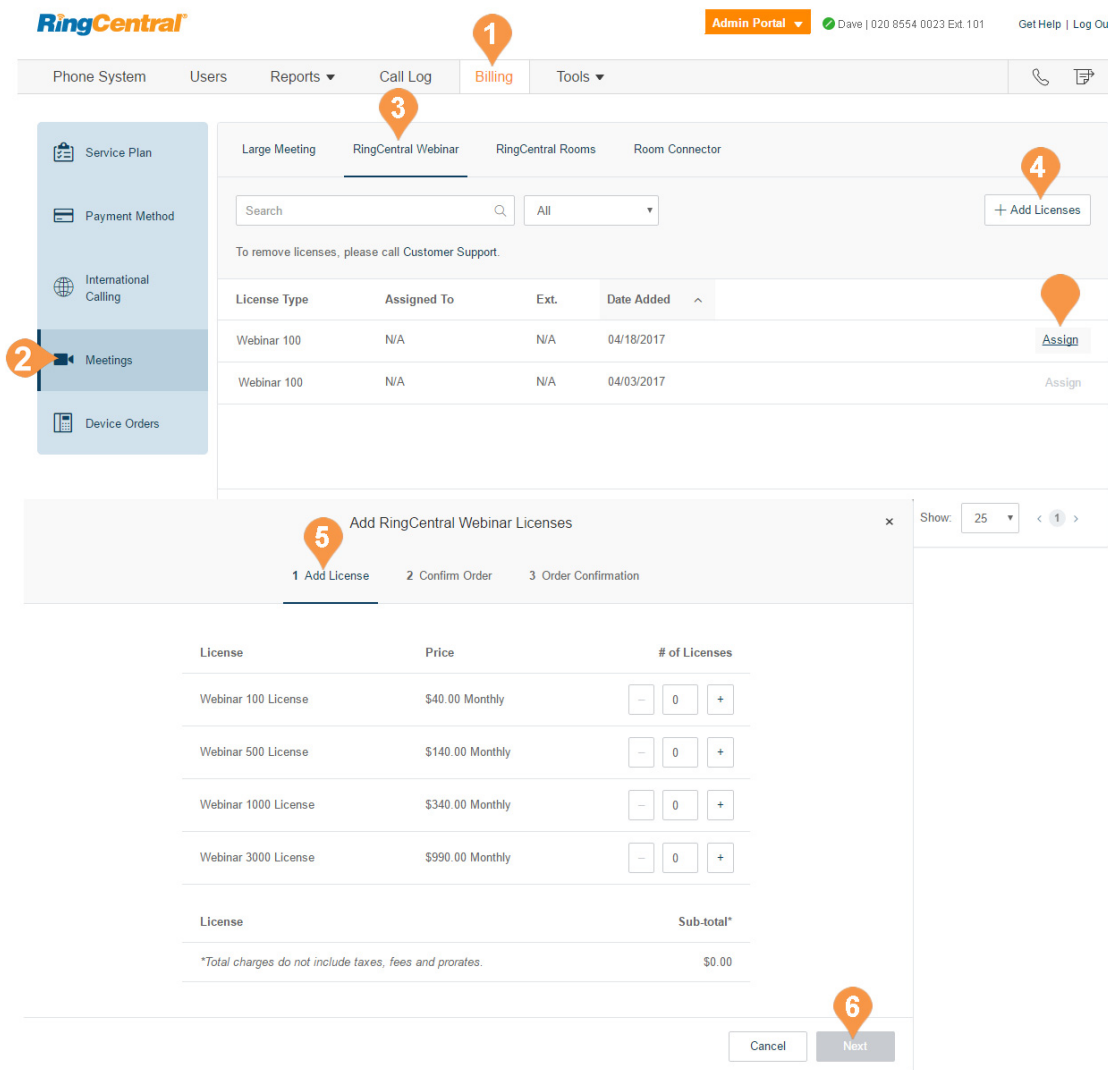
RingCentral Webinar is a user-based license for users who need to host online events. It is not an account-wide license.

### 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.



**RingCentral** Admin Portal | Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out

Phone System | Users | Reports | Call Log | **Billing** | Tools

Service Plan | Payment Method | International Calling | **Meetings** | Device Orders

Large Meeting | **RingCentral Webinar** | RingCentral Rooms | Room Connector

Search [ ] All [v] + Add Licenses

To remove licenses, please call Customer Support.

License Type	Assigned To	Ext.	Date Added	
Webinar 100	N/A	N/A	04/18/2017	<a href="#">Assign</a>
Webinar 100	N/A	N/A	04/03/2017	<a href="#">Assign</a>

**Add RingCentral Webinar Licenses**

1 Add License | 2 Confirm Order | 3 Order Confirmation

License	Price	# of Licenses
Webinar 100 License	\$40.00 Monthly	[ - ] 0 [ + ]
Webinar 500 License	\$140.00 Monthly	[ - ] 0 [ + ]
Webinar 1000 License	\$340.00 Monthly	[ - ] 0 [ + ]
Webinar 3000 License	\$990.00 Monthly	[ - ] 0 [ + ]
<b>License</b>	<b>Sub-total*</b>	
*Total charges do not include taxes, fees and prorates.		\$0.00

Cancel | **Next**

## 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 231.

\*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.

The screenshot illustrates the steps to add RingCentral Rooms licenses in the Admin Portal. It shows the navigation path from the Admin Portal to the Billing tab, then to Meetings, and finally to RingCentral Rooms. The existing licenses are listed in a table, and the 'Add Licenses' button is highlighted. The modal window for adding licenses shows the current status, the license limit, and the recurring charges for the selected number of licenses.

## 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](#).

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, a user profile (Dave | 020 8554 0023 Ext. 101), and links for Get Help and Log Out. The main navigation menu on the left includes Service Plan, Payment Method, International Calling, Meetings (highlighted with a blue bar and a '2' callout), Device Orders, and Cost Center Management. The top navigation tabs include Phone System, Users, Reports, Call Log, Billing (highlighted with a '1' callout), and Tools. The Billing tab is active, showing a sub-menu with Large Meeting, RingCentral Webinar, RingCentral Rooms, and Room Connector (highlighted with a '3' callout). The Room Connector page displays a table of existing licenses with columns for License Type, Cost Center Code, and Date Added. A '+ Add Licenses' button (callout '4') is in the top right. Below the table, a 'Total: 4' is shown. A 'Show: 25' dropdown and pagination are at the bottom right. An inset window titled 'Add RingCentral Rooms Licenses' is shown in the bottom right, with steps 5-8 highlighted: 5. Enter Number of Licenses (input field with '1'), 6. Update Licenses (button), 7. Recurring Charges (table), and 8. Sub-total (table).

License Type	Cost Center Code	Date Added
Room Connector	123456	07/08/2016
Room Connector	123456	07/08/2016
Room Connector	123456	07/08/2016
Room Connector	123456	07/08/2016

Total: 4

Show: 25 < 1 >

**Add RingCentral Rooms Licenses**

RingCentral Rooms Licenses Status: Licenses already added: 1  
Licenses number limit: 1000

You can add up to 50 multiple RingCentral Rooms Licenses at a time.

Enter Number of Licenses: 1 Update Licenses

RingCentral Rooms Licenses are \$468.00/license.

<b>Recurring Charges</b>		<b>Sub-total</b>
RingCentral Rooms Licenses	1 x \$468.00	\$468.00

\*Total charges do not include taxes, fees and penalties.

Cancel Next

## 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**.

**RingCentral** Admin Portal | Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out

Phone System | Users | Reports | Call Log | **Billing** | Tools

Service Plan | Payment Method | International Calling | Meetings | **Device Orders** | Cost Center Management

Search Orders From: Past 6 months | Search Order

Order Number	Order Placed	Device Quantity	Status
418008	01/08/2016 1:54 AM	4	Pending

**Edit Order: 418008**

Please note: Only phone type and shipping can be modified for an existing order. To make any other changes, please call support (888) 898-4591.

**Original Order**

Quantity	Area Code	Phone	Original Charges*
4	(415)	Polycom VVX-310 Gigabit Ethernet Phone	\$836.00 (4 x \$209.00) - one time

**Order Changes**

Quantity	Area Code	Phone	New Charges/Credits*
(2)	(415)	Polycom VVX-310 Gigabit Ethernet Phone	(\$418.00) (2 x \$209.00) - one time
2	(415)	Yealink W52P with 2 Handsets	\$678.00 (2 x \$339.00) - one time

**Original Phone Order Charges**

One Time Charges	Quantity	Sub-total*
Phones	4	\$836.00
Shipping Fees		\$21.55
<b>Recurring Charges</b>		<b>Sub-total*</b>
Phone Rental	0	\$0.00
<b>Total Paid*</b>		<b>\$857.55</b>

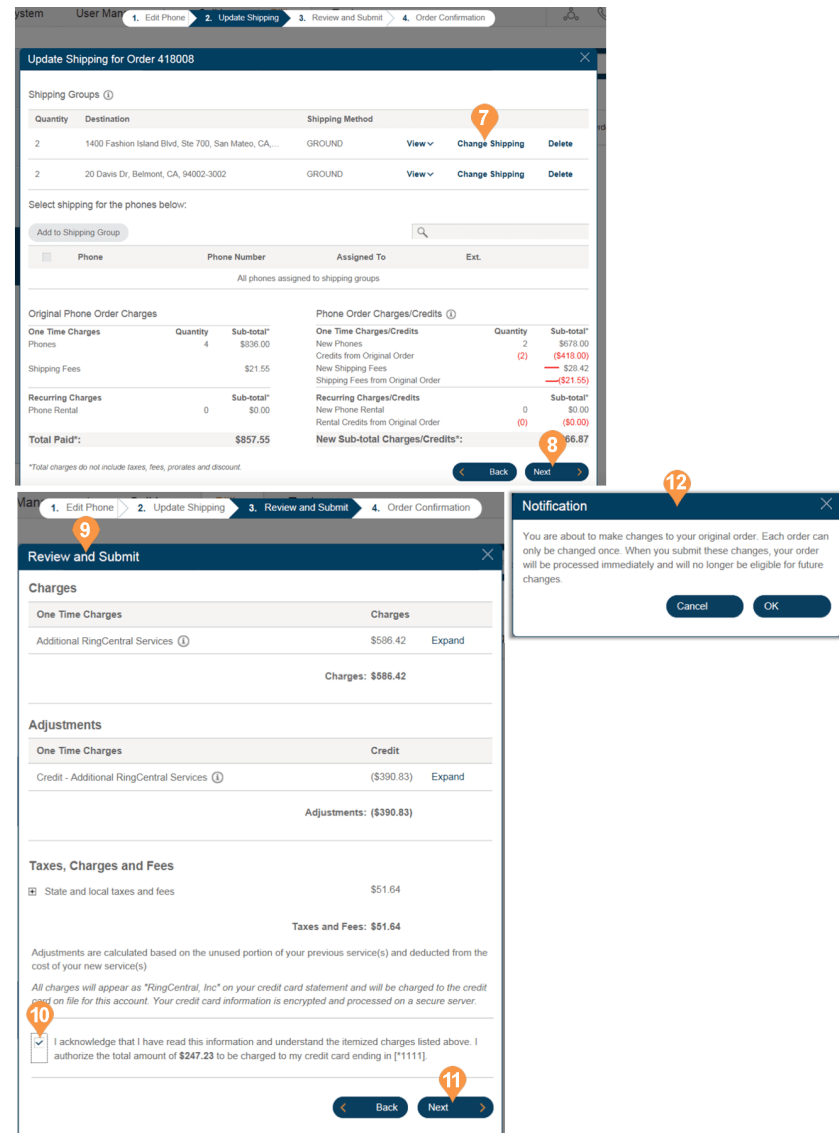
**Phone Order Charges/Credits ①**

One Time Charges/Credits	Quantity	Sub-total*
New Phones	2	\$678.00
Credits from Original Order	(2)	(\$418.00)
<b>Recurring Charges/Credits</b>		<b>Sub-total*</b>
New Phone Rental	0	\$0.00
Rental Credits from Original Order	(0)	(\$0.00)
<b>New Sub-total Charges/Credits*</b>		<b>0.00</b>

\*Total charges do not include taxes, fees, prorates and discount.

Cancel | 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.



System User Manager 1. Edit Phone 2. Update Shipping 3. Review and Submit 4. Order Confirmation

### Update Shipping for Order 418008

Shipping Groups (1)

Quantity	Destination	Shipping Method	View	Change Shipping	Delete
2	1400 Fashion Island Blvd, Ste 700, San Mateo, CA...	GROUND	View	Change Shipping	Delete
2	20 Davis Dr, Belmont, CA, 94002-3002	GROUND	View	Change Shipping	Delete

Select shipping for the phones below:

Add to Shipping Group

Phone	Phone Number	Assigned To	Ext.
All phones assigned to shipping groups			

Original Phone Order Charges

One Time Charges	Quantity	Sub-total
Phones	4	\$836.00
Shipping Fees		\$21.55
<b>Recurring Charges</b>	<b>Sub-total</b>	
Phone Rental	0	\$0.00
<b>Total Paid:</b>		<b>\$857.55</b>

Phone Order Charges/Credits (1)

One Time Charges/Credits	Quantity	Sub-total
New Phones	2	\$678.00
Credits from Original Order	(2)	(\$418.00)
New Shipping Fees		\$28.42
Shipping Fees from Original Order		(\$21.55)
<b>Recurring Charges/Credits</b>	<b>Sub-total</b>	
New Phone Rental	0	\$0.00
Rental Credits from Original Order	(0)	(\$0.00)
<b>New Sub-total Charges/Credits:</b>		<b>\$66.87</b>

\*Total charges do not include taxes, fees, prorates and discount.

Back Next

### Review and Submit

Charges

One Time Charges	Charges
Additional RingCentral Services (1)	\$596.42
<b>Charges: \$596.42</b>	

Adjustments

One Time Charges	Credit
Credit - Additional RingCentral Services (1)	(\$390.83)
<b>Adjustments: (\$390.83)</b>	

Taxes, Charges and Fees

State and local taxes and fees	
	\$51.64
<b>Taxes and Fees: \$51.64</b>	

Adjustments are calculated based on the unused portion of your previous service(s) and deducted from the cost of your new service(s)

All charges will appear as "RingCentral, Inc" on your credit card statement and will be charged to the credit card on file for this account. Your credit card information is encrypted and processed on a secure server.

I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of \$247.23 to be charged to my credit card ending in [\*1111].

Back Next

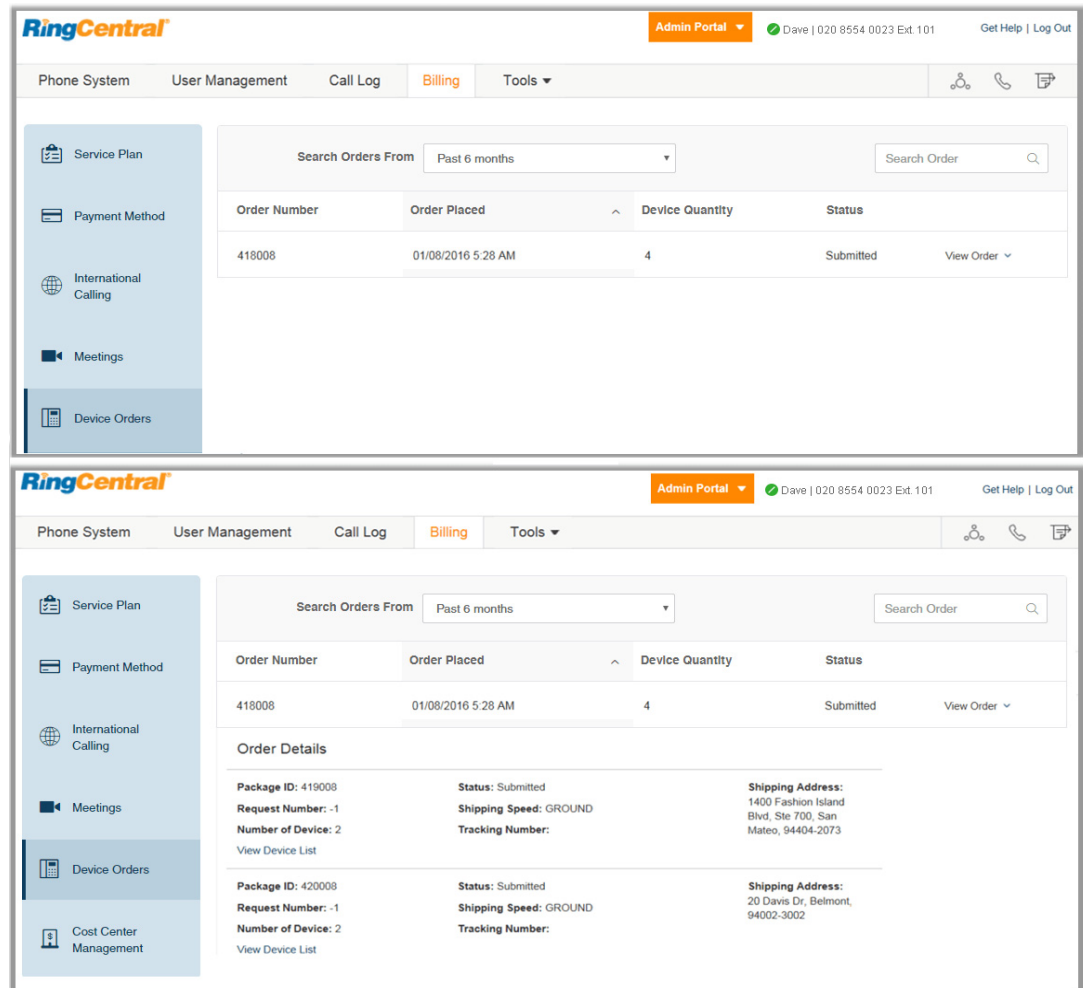
### Notification

You are about to make changes to your original order. Each order can only be changed once. When you submit these changes, your order will be processed immediately and will no longer be eligible for future changes.

Cancel OK

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

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



The screenshot displays the RingCentral Admin Portal interface, specifically the Billing section. The top navigation bar includes 'Phone System', 'User Management', 'Call Log', 'Billing' (highlighted), and 'Tools'. A sidebar on the left lists 'Service Plan', 'Payment Method', 'International Calling', 'Meetings', 'Device Orders' (highlighted), and 'Cost Center Management'. The main content area shows a table of orders with columns: Order Number, Order Placed, Device Quantity, and Status. A search bar at the top right of the table allows filtering by 'Past 6 months'. The table lists one order: 418008, placed on 01/08/2016 at 5:28 AM, with a quantity of 4 and a status of 'Submitted'. A 'View Order' link is available for this order. Below the table, the 'Order Details' section provides information for two packages: 419008 and 420008. Both packages are submitted, have a request number of -1, and a device count of 2. Shipping addresses are provided for each package.

Order Number	Order Placed	Device Quantity	Status
418008	01/08/2016 5:28 AM	4	Submitted

**Order Details**

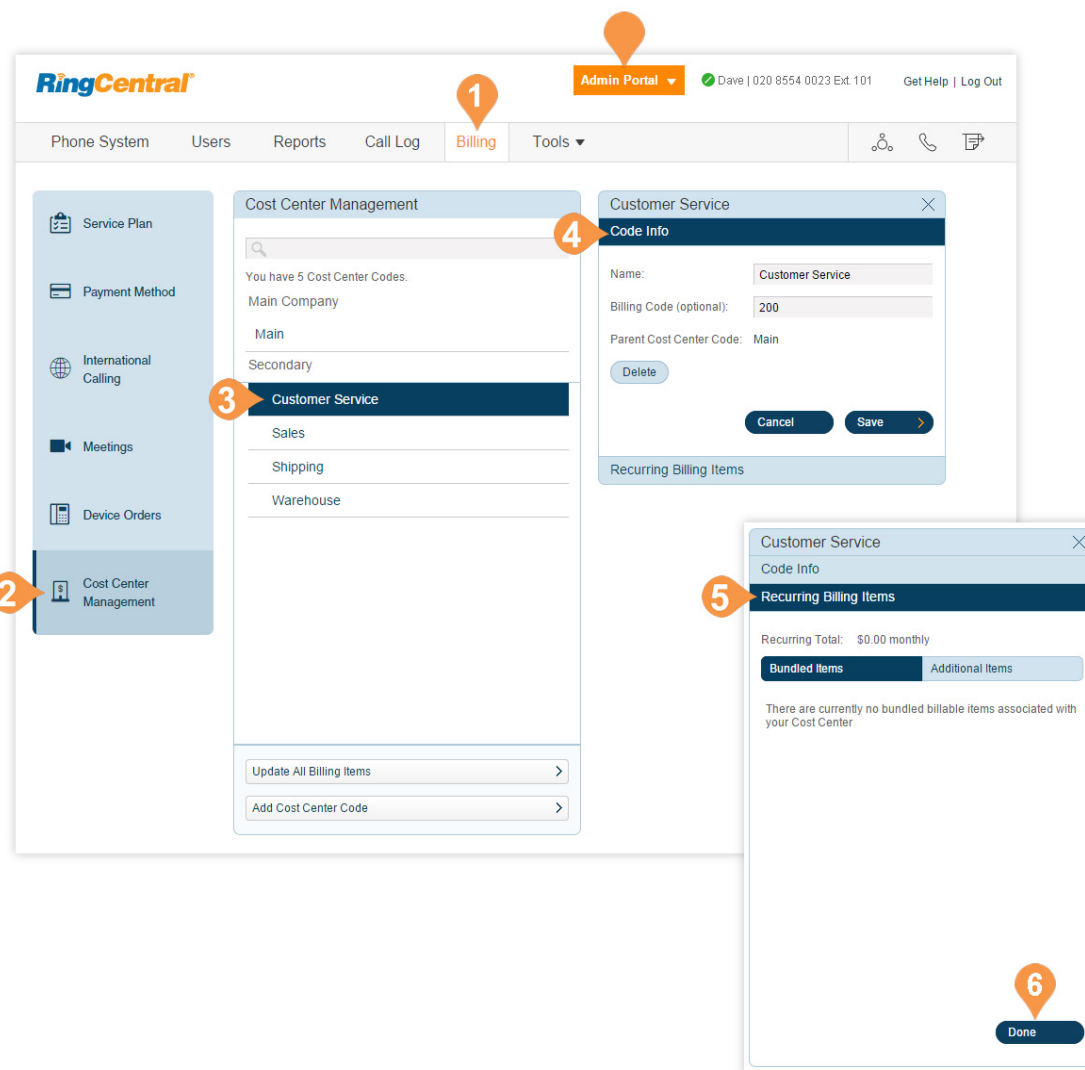
Package ID	Status	Shipping Address
419008	Submitted	1400 Fashion Island Blvd, Ste 700, San Mateo, 94404-2073
420008	Submitted	20 Davis Dr, Belmont, 94002-3002

## 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.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, a user profile 'Dave | 020 8554 0023 Ext. 101', and links for 'Get Help' and 'Log Out'. The main navigation menu on the left lists 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing' (highlighted), and 'Tools'. The 'Billing' section is expanded, showing 'Cost Center Management' (highlighted with a red circle 3), 'Update All Billing Items' (highlighted with a red circle 4), and 'Add Cost Center Code' (highlighted with a red circle 5).

The 'Cost Center Management' modal window shows a search bar and a list of cost center codes. The list includes 'Main Company', 'Main', 'Secondary', 'Customer Service', 'Sales', 'Shipping', and 'Warehouse'. A red circle 4a points to the 'Main' code, 4b points to the 'Sales' code, and 4c points to the 'Shipping' code. The 'Update All Billing Items' button is highlighted with a red circle 4.

The 'Update Items' modal window is open, showing a message: 'You have 4 Items. If you already have a filled out template please proceed to Step 3.' It includes a 'Download' button (highlighted with a red circle 4a), an 'or Email:' field with an 'Add one Email address' button and a 'Send' button, a 'Step 2: Fill Out Template' section with a 'Download' button (highlighted with a red circle 4b), and a 'Step 3: Upload File' section with a 'Browse' button (highlighted with a red circle 4c) and an 'Upload' button. A 'Cancel' button is at the bottom right.

The 'Add New Cost Center Code' modal window is open, showing a form with fields for 'Enter Name:' (containing 'Training'), 'Billing Code (optional):' (containing '600'), and 'Select Parent Cost Center Code:'. The 'Select Parent Cost Center Code' dropdown is expanded, showing a list of codes: 'Main' (highlighted with a red circle 5b), 'Customer Service', 'Sales', 'Shipping', and 'Warehouse'. The 'Save' button is highlighted with a red circle 5c. A 'Cancel' button is at the bottom left.

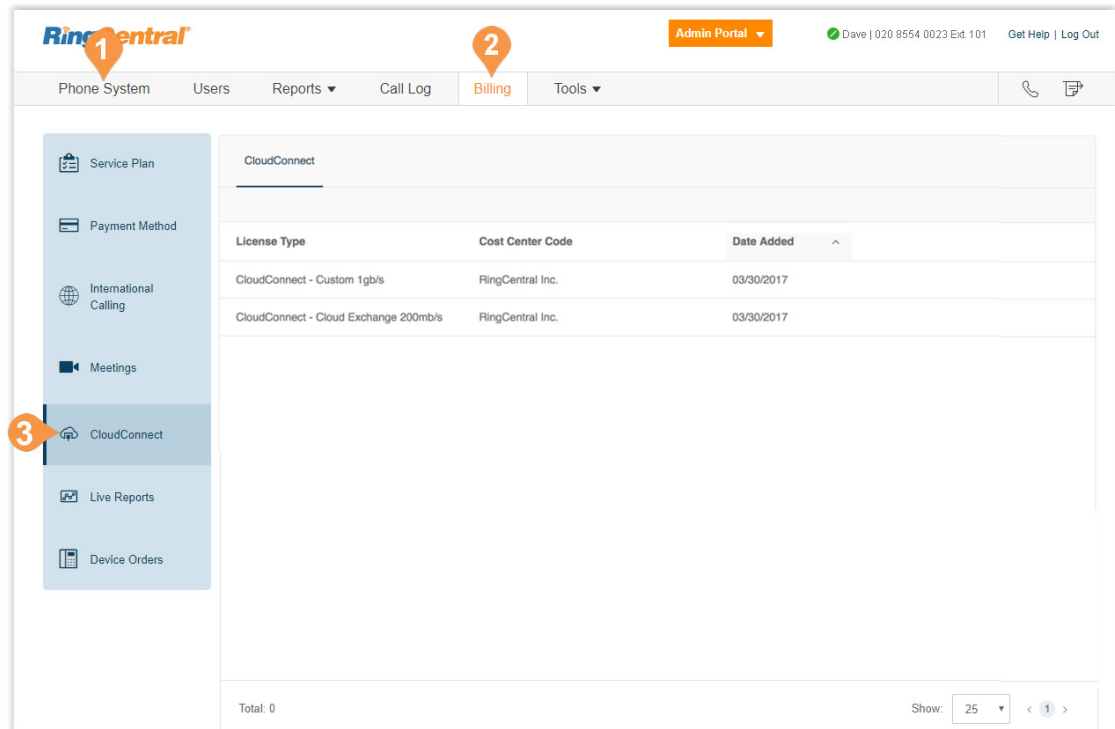
## CloudConnect

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.



License Type	Cost Center Code	Date Added
CloudConnect - Custom 1gb/s	RingCentral Inc.	03/30/2017
CloudConnect - Cloud Exchange 200mb/s	RingCentral Inc.	03/30/2017

Total: 0

Show: 25 < 1 >

## Live Reports

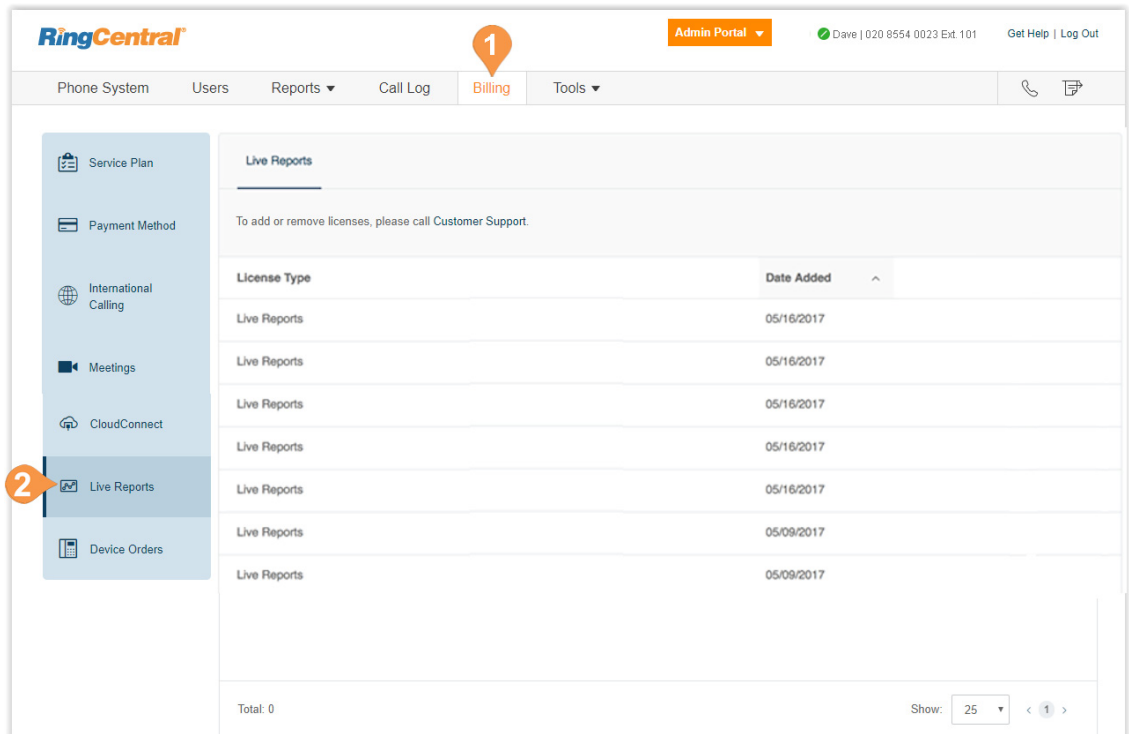
Live Reports provides access for users to build dashboards and reports to show data on inbound and outbound calls in close to real time.

When Live Reports is enabled for your account, users with Live Reports permission has access to Live Reports. You 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.



**RingCentral** Admin Portal

Phone System Users Reports Call Log **Billing** Tools

Service Plan  
Payment Method  
International Calling  
Meetings  
CloudConnect  
**Live Reports**  
Device Orders

**Live Reports**

To add or remove licenses, please call Customer Support.

License Type	Date Added
Live Reports	05/16/2017
Live Reports	05/16/2017
Live Reports	05/16/2017
Live Reports	05/16/2017
Live Reports	05/16/2017
Live Reports	05/16/2017
Live Reports	05/09/2017
Live Reports	05/09/2017

Total: 0

Show: 25 < 1 >

## Tools Menu

## 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, configuration for your web conferencing settings (for Meetings, Rooms, and Webinar), and reports. To learn more about this, see, [“Introduction to Managing Meetings” on page 232.](#)

**Archiver** lets you 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. To learn more about this, see [“Archiver” on page 215.](#)

**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 216.](#)

**Session Timeout** lets you configure a session timeout for all users. To learn more about this, see [“Session Timeout” on page 217](#)

**Hot Desk Session Timeout** specifies the time period when guest users will be logged out from phone endpoints. To learn more about this, see [“Set the Hot Desking Session Timeout” on page 144.](#)

2 Active Directory available for Office Premium and Ultimate users only

3 Available for US users only.

4 Available for Office Premium and Ultimate users with Multi-Level IVR.

**Single Sign-On**<sup>1</sup> lets employees in a company access multiple applications with one set of credentials. To learn more about this, see [“Single Sign-on” on page 220.](#)

**Directory Integration**<sup>2</sup> 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 223.](#)

**Multi-Site Settings**<sup>4</sup> allows you to configure and manage your different office locations under one account. To learn more about this, see [“Multi-Site Settings” on page 224.](#)

**Note:** Users in Canada will also see an option for **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. Be aware that the Free Desktop App line may incur taxes and fees.

1 Not available for one-line accounts.

## 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.

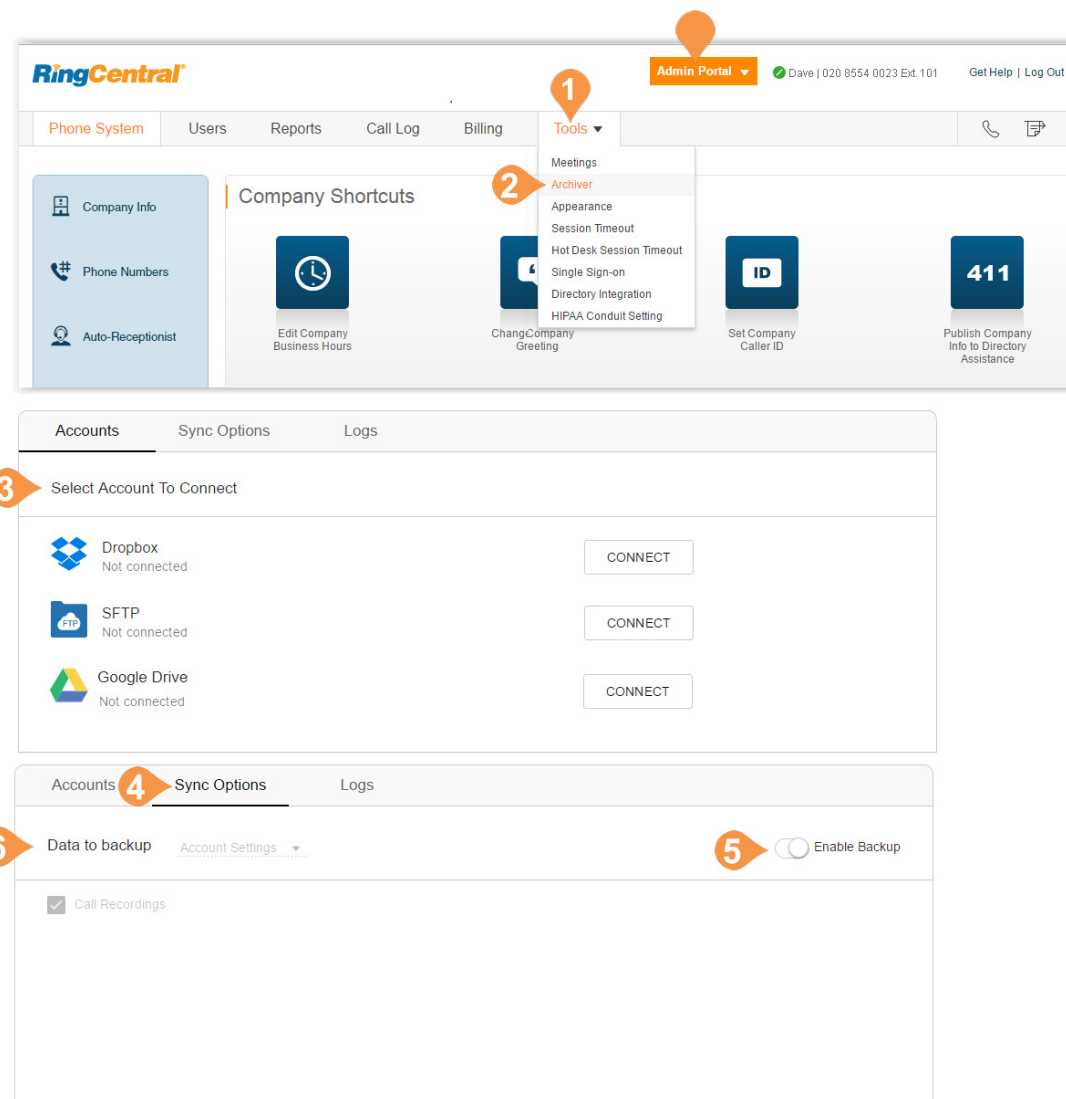
### Configure RingCentral Archiver

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 and/or Fax.

For more information on using the RingCentral Archiver tool, see the [RingCentral for Dropbox User Guide](#).

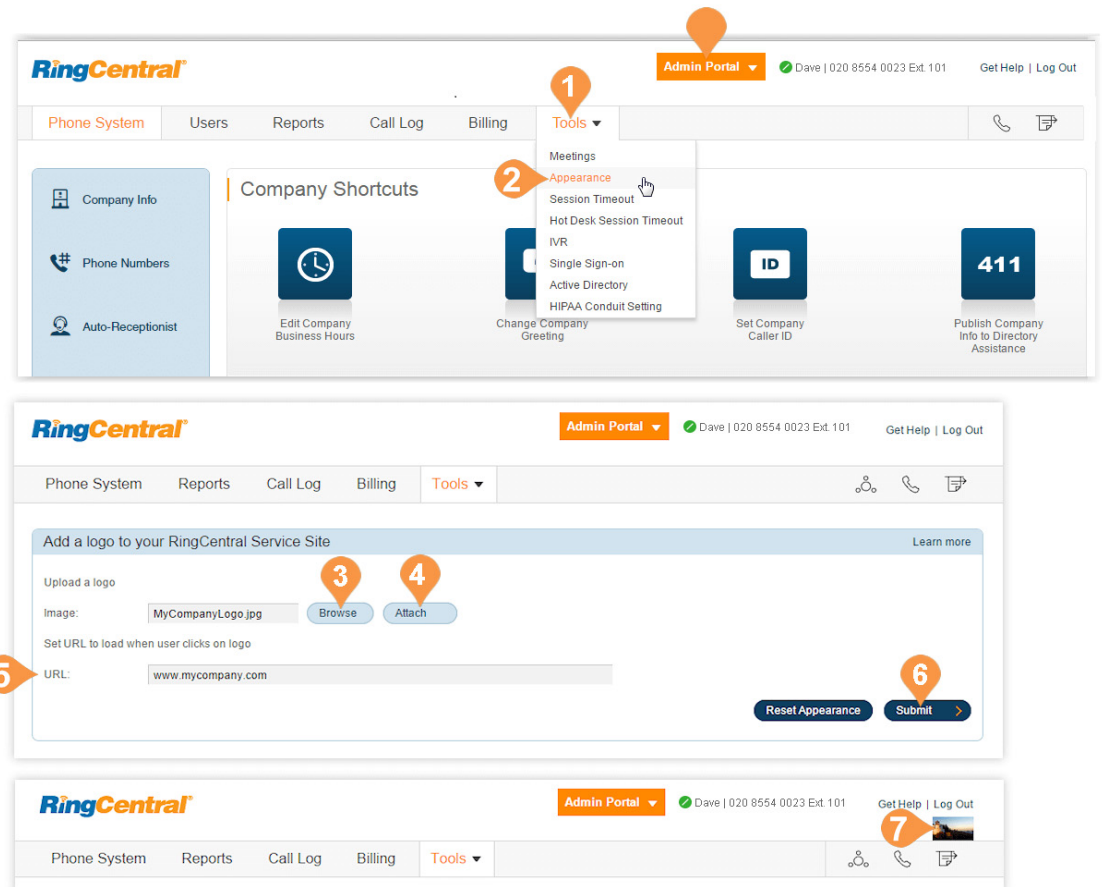


## Appearance

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.

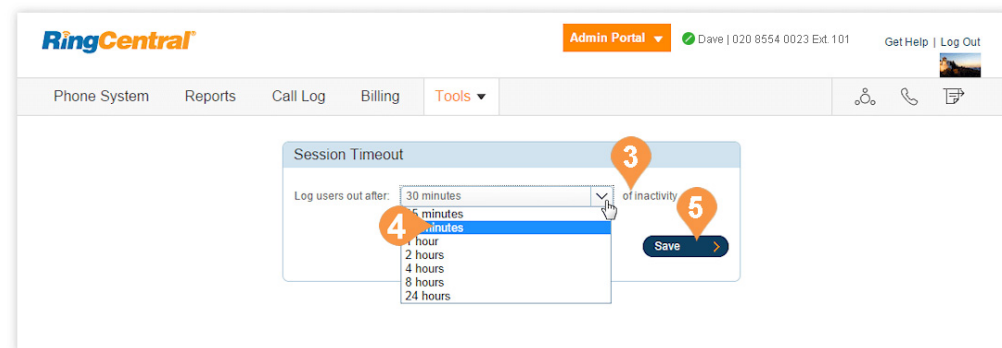
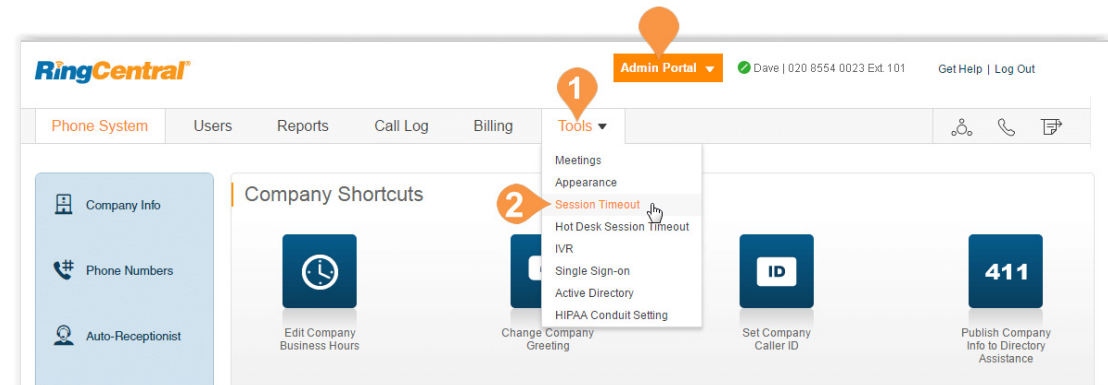
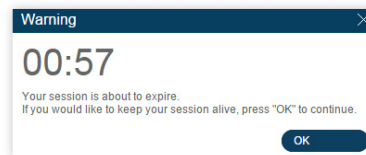


## Session Timeout

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:

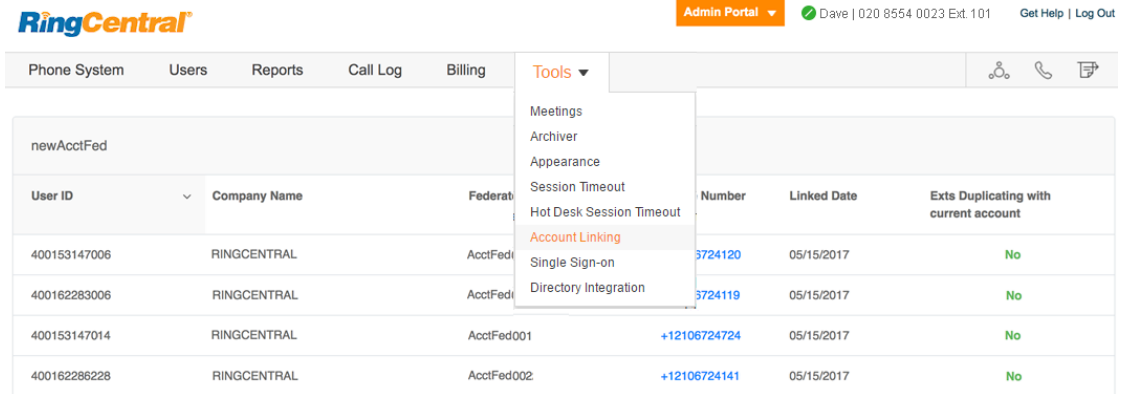
1. Contact RingCentral support to request access to the Account Federation feature. RingCentral support will help evaluate if your account qualifies for the feature.
2. The RingCentral support agent enables the Account Federation feature and adds your linked accounts within your online account.
3. Unique 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.



The screenshot shows the RingCentral Admin Portal interface. At the top, there's a navigation bar with the RingCentral logo, an 'Admin Portal' dropdown, and user information: 'Dave | 020 8554 0023 Ext.101'. Below this is a secondary navigation bar with tabs: 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Tools' tab is selected, and a dropdown menu is open showing options: 'Meetings', 'Archiver', 'Appearance', 'Session Timeout', 'Hot Desk Session Timeout', 'Account Linking' (highlighted in red), 'Single Sign-on', and 'Directory Integration'. Below the menu, a table displays the list of linked accounts.

User ID	Company Name	Federated Name	Number	Linked Date	Exts Duplicating with current account
400153147006	RINGCENTRAL	AcctFed001	+12106724120	05/15/2017	No
400162283006	RINGCENTRAL	AcctFed002	+12106724119	05/15/2017	No
400153147014	RINGCENTRAL	AcctFed001	+12106724724	05/15/2017	No
400162286228	RINGCENTRAL	AcctFed002	+12106724141	05/15/2017	No

## 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.

One of the SSO services that RingCentral integrates with is 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 catalogue. The configuration process involves configuring RingCentral for SSO in G Suite Admin Console and configuring 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.

The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Tools' menu is open, and 'Single Sign-on' is selected. The main content area displays the 'Single Sign-on (SSO)' configuration page. It includes a section for 'SSO Configuration' with two options: 'Set up SSO by yourself' and 'Contact Customer Support'. The 'Set up SSO by yourself' option has two steps: 'Step 1: Upload identity provider metadata file and certificate' and 'Step 2: Export Service Provider metadata and import it into your Federation Server'. The 'Contact Customer Support' option has a 'View Detail' link. Below these options, there is a section for 'Enable SSO' with a checkbox and fields for 'Identity Provider Entity ID' and 'SSO unique ID'.

## 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**.

### SSO Configuration

Choose one of the options below to set up SSO for your company.

#### Set up SSO by yourself

Step 1: Upload identity provider metadata file and certificate.

1 **Set Up**

Step 2: Export Service Provider metadata and import it into your Federation Server.

5 **Download**

Set up Single Sign-on

In order to set up SSO properly, please upload your Identity Provider (IDP) SAML metadata first, and then make sure the attribute is mapped correctly.

**Upload IDP metadata**

Please upload a valid SAML metadata file.

Upload Metadata by

Upload with file

**Browse**

**SSO General Information**

Identity Provider Entity ID	Connection Protocol
None	SAML 2.0
Connection Type	Browser SSO SAML Profile
Browser SSO	IDP-initiated SSO and SP-initiated SSO
SAML Bindings	
None	

**Attribute Mapping**

Please make sure the email attribute is mapped to the correct value in the metadata.

Map Email Attribute to

None

**Certificate Management**

Please upload certificate and set the primary one.

**Upload**

Order	Subject DN	Signature Algorithm	Expires
No result. Please upload metadata file first.			

**Cancel** **Save**

6

#### Enable SSO

☒ Enable SSO Service

#### Identity Provider Entity ID

http://www.okta.com/fgeuigrhTGEfjdn

☐ Allow users to log in with SSO or RingCentral credential

#### SSO unique ID

Email

7

**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**.

### SSO Configuration

Choose one of the options below to set up SSO for your company.

#### Set up SSO by yourself

Step 1: Upload identity provider metadata file and certificate.

[Set Up](#)

Step 2: Export Service Provider metadata and import it into your Federation Server.

[Download](#)

#### Contact Customer Support

Customer support number

Contact RingCentral customer support to set up SSO

[View Detail](#)

#### Contact Support to Enable SSO

Please follow the steps below for the request.

##### 2 Step 1. Prepare IDP SAML 2.0 metadata

To set up SSO, we need your SAML 2.0 metadata details from an Identity Provider (IDP), like PingFederate, Okta, or a homegrown IDP.

SAML 2.0 Reference

Sample SAML 2.0 metadata

##### 3 Step 2. Call RingCentral Customer Support

Call RingCentral Customer Support and 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.

Find your RingCentral customer support number

##### 4 Step 3. Import SAML 2.0 Service Provider (SP) metadata

You will receive an email from RingCentral Customer Support containing SAML 2.0 SP metadata. You need to import this data into your Federation Server.

[OK](#)

#### Enable SSO

☒ Enable SSO Service

##### Identity Provider Entity ID

<http://www.okta.com/fgeuighTGEfjd>

##### SSO unique ID

Email

☐ Allow users to log in with SSO or RingCentral credential

[6](#)

[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 synchronise 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.

**RingCentral** Admin Portal | Dave | 020 8554 0023 Ext. 101 | Get Help | Log Out

Phone System | Users | Reports | Call Log | Billing | **Tools** | Directory Integration

**Company Shortcuts**

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

### Select Directory Provider

Active Directory

RingCentral Active Directory Integration service lets you automatically provision users from Microsoft Active Directory / LDAP to RingCentral. Okta syncs Active Directory / LDAP and RingCentral on users status, so users are automatically enabled / disabled in RingCentral as they join or move around your organisation. Connect RingCentral user management to your Active Directory / LDAP with Okta. Enabling Active Directory / LDAP integration with RingCentral is simple, wizard driven process.

[Learn more >](#)

### Okta Setup

Step 1: For your Active Directory to provision correctly, all email addresses should be unique within your account. Please verify there are no duplicates to continue.

Enable Active Directory

Step 2: Sign up become an Okta member.

Become Okta Member

If you are an Okta Customer, please login into your Okta domain URL.

Step 3: Configure RingCentral Active Directory Integration settings in Okta. After saving changes, provisioning will start.

Please note: If you would like pre-assigned extensions, please make sure the correct extensions are in the Active Directory / LDAP. Otherwise, extensions are randomly assigned after provision configuration.

### Review Provision Results

After provisioning is completed, you can review the results in the Okta Report section. An email with the provisioning results (including a summary and report) will also be sent after provisioning. You will be able to review successful provisioning results and any errors that may occur in the email.

### Managing Provisioned users

If you would like to edit extensions of the provisioned users, you can do so in the undefined's User management page.

## 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.

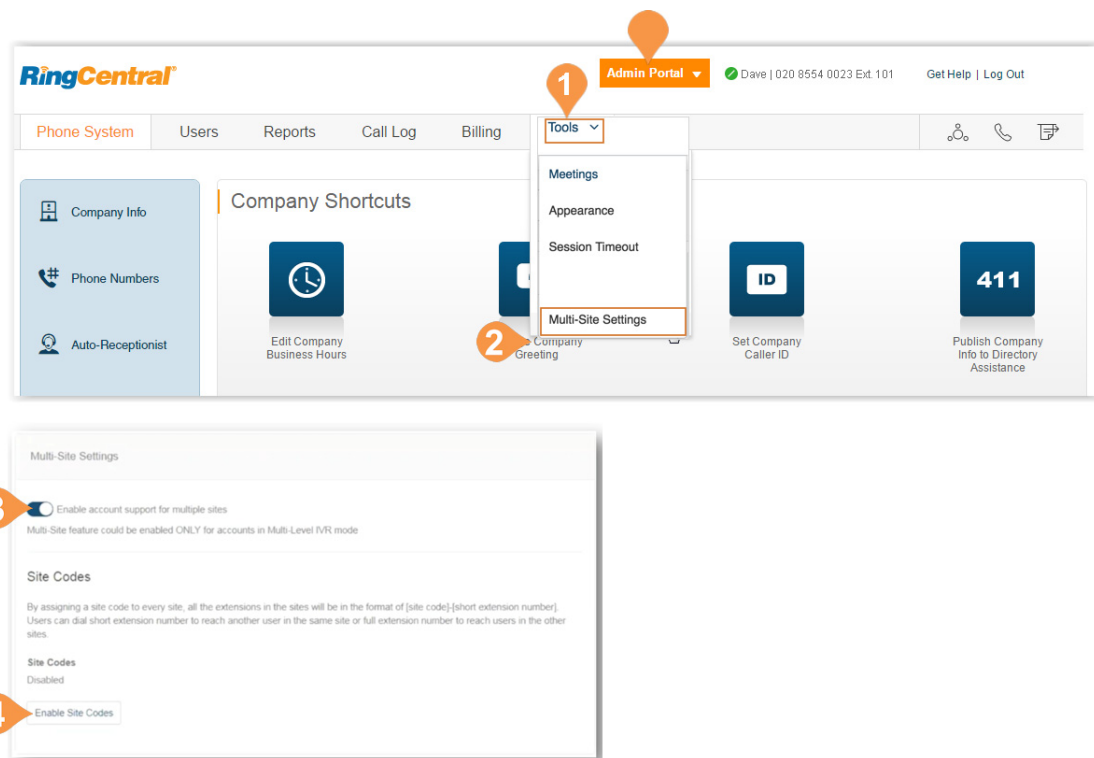
To enable your account to support multiple sites:

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.

The screenshots illustrate the process of creating a new site in the RingCentral Admin Portal. The first screenshot shows the 'Phone System' tab selected in the left sidebar, with 'Company Info' highlighted. The 'New Site' button is visible in the top right. The second screenshot shows the 'New Site' wizard at the 'Site Info' step, where fields for Site Name, Site Address, and Site Extension are provided. The third screenshot shows the 'Site Settings' step, where regional settings like Time Zone, Home Country Code, and Business Hours are configured. The fourth screenshot shows the 'Number(s)' step, where existing numbers are listed in a table for selection.

Number	Location	Assigned to	Ext.	Type
(289) 275-1346	Canada, Ancaster, ON	Auto-Receptionist		Direct
(916) 836-8652	United States, Antelope, CA	Owen Wilson	8070	Direct
(916) 836-8819	United States, Antelope, CA	James Franco	8069	Direct
(904) 323-4965	United States, Baldwin, FL	Chris Stocker	104	Direct
(240) 317-2654	United States, Berwyn, MD	Auto-Receptionist		Direct
(619) 220-2356	United States, Bonita, CA	TestIQ	1	Direct



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**.

**New Site**

✓ Site Info ✓ Site Settings ✓ Number(s) **6** 4 Caller ID Name 5 IVR Menu 6 Cost Center Code 7 Summary

This name along with the phone number will be displayed to the called party whenever an outbound call is made using the local number as the caller ID. Max 15 characters. Note: Does not apply to toll-free numbers.

Enter the name you want the caller ID to be displayed for this site. If skipped, site's caller ID name will be set to be the same as company's caller ID name.

Outbound Caller ID Name

Back Next

---

**New Site**

✓ Site Info ✓ Site Settings ✓ Number(s) ✓ Caller **7** 5 IVR Menu 6 Cost Center Code 7 Summary

Please assign Existing or New IVR

Existing IVR New IVR

Search

Name	Numbers	Ext.	Language
Belmont Main 1010		1010	English (U.S.)
Chicago IVR		1009	English (U.S.)
Denver IVR		1002	English (U.S.)
IVR Menu 1006		1006	English (U.S.)
IVR Menu 1007		1007	English (U.S.)
IVR Menu 1008		1008	English (U.S.)
IVR Menu 1012 TB		1012	English (U.S.)
IVR Menu 1015		1015	English (U.S.)
Magic_Land_IVR 1004		1004	English (U.S.)
Main IVR		1001	English (U.S.)

Total: 15 < 1 2 >

Back Next

---

**New Site**

✓ Site Info ✓ Site Settings ✓ Number(s) ✓ Caller ID Name ✓ IVR **8** 6 Cost Center Code 7 Summary

Cost Center Code Learn More

east coast New

Back Next

## 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.

The first screenshot shows the 'Site Codes' window, Step 1: Extension Number Length. It displays 'Max Extension Length: 5' and 'Site Code Length' set to 2. The second screenshot shows Step 2: Provision Site Codes. It lists sites like 'Company' and 'Local Office' with suggested site codes (11, 33) and short extension numbers (911, 0). The third screenshot shows Step 3: Adjust Extension Numbers. It displays a table of existing extensions and their new numbers after site code prepending.

Ext. Name	Target Site	Site Code	Ext. number with Site Code	Type of Conflict	New Short Ext. Number	New Full Ext. Number
TopIVR	Company	11	11001	Extension number is too long	1	11001
IVR Menu 1002	Local Office	33	331002	Extension number is too long	2	33002

The fourth screenshot shows the 'Users With Extensions' view. It displays a table of users and their extensions.

Status	Name	Number	Ext.	Roles	Department	Site	Msg.
Active	Admin User	13103	13103	Super Admin	HR	0 / 0	Disable
Active	Simple User	33106	33106	Standard B	Local Office	0 / 0	Disable
Active	User	11102	11102	Super Admin	Company	1 / 1	

## 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.

The screenshot illustrates the steps to move users across sites in the RingCentral Admin Portal. It shows the 'Users' tab selected, a list of users with checkboxes for selection, and the 'Change Site' button. A modal window for selecting a site is also shown, with 'New Site 1' selected and the option to adjust time and regional settings checked.

Users With Extensions		Unassigned Extensions							
<input type="text" value="Search Users"/> <input type="button" value="Status"/> <input type="button" value="Roles"/> <input type="button" value="+ Add User"/> <input type="button" value="Download User List"/>									
<input type="button" value="Delete"/> <input type="button" value="Enable"/> <input type="button" value="Disable"/> <input type="button" value="Resend Invite"/> <input type="button" value="Apply Template"/> <input type="button" value="Change Site"/>									
	Status	Name	Number	Ext.	Roles	Department	Site	Meg.	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	9dot4 Prod...	(650) 437-5...	101	Super Admin		Company	5 / 5	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Andrew White	(913) 228-1...	8072	Standard (L...	IT	MagicLand	0 / 0	Resend Invite Delete
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Brian Bolan...	(323) 388-4...	8057	Super Admin	Solutions E...	SoCal (Dont...	2 / 2	Disable
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Charlene Lin		8071	Standard (L...		New Land	0 / 0	Resend Invite Delete

Select Site

Site

- ☐ Chicago
- ☒ New Site 1
- ☐ NewSite
- ☐ Orlando
- ☐ San Jose
- ☐ Xiamen

Total: 14 Show: 25 < 1 >

☐ Adjust time and regional settings to the settings of the new site?

## 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**.

The screenshot shows the RingCentral Admin Portal interface. On the left sidebar, the 'Phone System' tab is selected, and 'Auto-Receptionist' is highlighted with an orange box and a '1' in a circle. The main content area shows the 'IVR Menus' tab selected, with a 'Change Site' button highlighted with an orange box and a '2' in a circle. Below this, a table lists IVR menus. The first row, 'Belmont Main 1010', is selected with a checkbox. A 'Select Site' modal is open, showing a list of sites. 'New Site 1' is highlighted with an orange box and a '3' in a circle. At the bottom of the modal, a 'Change Site' button is highlighted with an orange box and a '3' in a circle.

Name	Numbers	Ext.	Language	Site
Belmont Main 1010		1010	English (U.S.)	Company

Select Site

Site

- Chicago
- New Site 1
- NewSite
- Orlando
- San Jose
- Xiamen

Total: 14 Show: 25 < 1 >

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.

The screenshot illustrates the process of moving a call queue between sites in the RingCentral Admin Portal. It is divided into two main sections: a left-hand navigation menu and a main content area.

**Left-hand Navigation Menu:**

- Phone System** (selected)
- Users**
- Company Info**
- Phone Numbers**
- Auto-Receptionist**
- 6 Group(s)** (highlighted with a red box and labeled '1')
  - 2 Other(s)
- Phones & Devices**

**Main Content Area:**

The top navigation bar includes tabs for **Call Queues**, **Paging Only**, **Shared Lines**, **Park Locations**, **Call Monitoring**, and **Others**. The **Call Queues** tab is active.

Below the tabs, there is a section for creating a call queue with a search bar, a 'Sites' dropdown, and a '+ New Call Queue' button. Below this is a table of existing call queues:

Status	Name	Site	Numbers	Ext.	Msg.	Members Availability	
<input checked="" type="checkbox"/>	Denver Test Queue	Denver		3	0 / 0	2 / 0	Resend Invitation Delete

A red box labeled '2' highlights the 'Change Site' button next to the 'Denver Test Queue'.

Clicking 'Change Site' opens a 'Select Site' dialog box. It contains a search bar and a list of sites:

- Chicago
- New Site 1** (highlighted with a red box and labeled '3')
- NewSite
- Orlando
- San Jose
- Xiamen

At the bottom of the dialog, there is a checkbox labeled 'Adjust time and regional settings to the settings of the new site?' and a 'Change Site' button.

# 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)

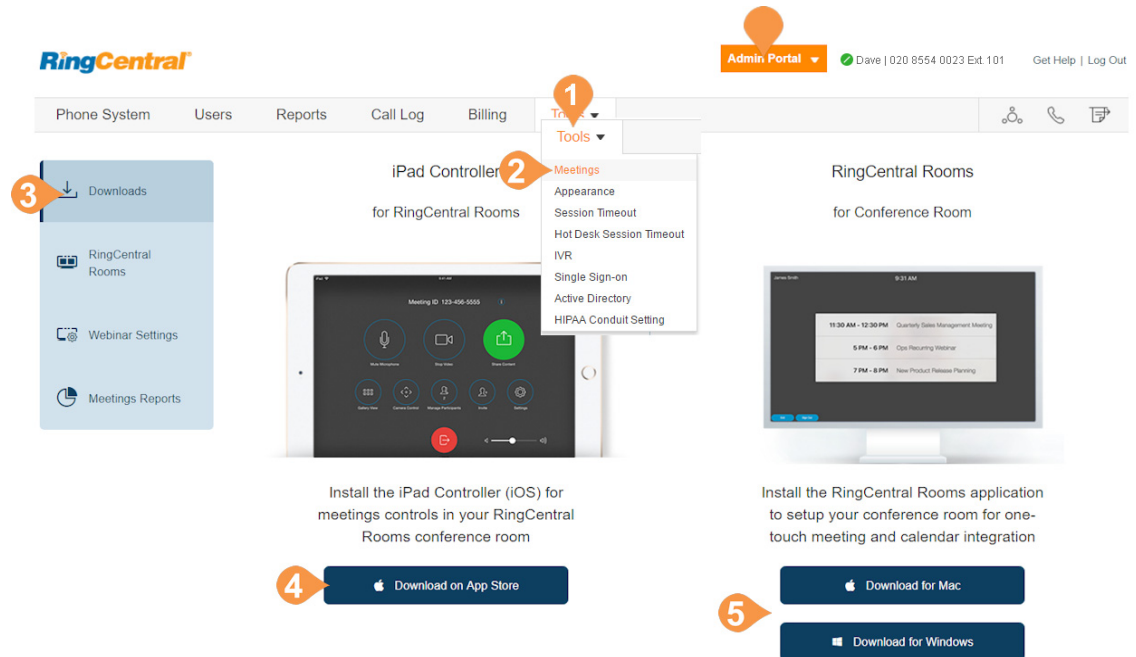
\*RingCentral Rooms and Webinar require purchased licenses.

## 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.



The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', and 'Billing'. The 'Tools' dropdown menu is open, showing options like 'Meetings', 'Appearance', 'Session Timeout', 'Hot Desk Session Timeout', 'IVR', 'Single Sign-on', 'Active Directory', and 'HIPAA Conduit Setting'. The 'Meetings' option is selected, leading to the 'RingCentral Rooms for Conference Room' page. On the left sidebar, the 'Downloads' section is highlighted. The main content area displays two installation options: 'iPad Controller (iOS) for meetings controls in your RingCentral Rooms conference room' and 'RingCentral Rooms for Conference Room'. The iPad controller option includes a 'Download on App Store' button. The RingCentral Rooms option includes 'Download for Mac' and 'Download for Windows' buttons. Numbered callouts (1-5) indicate the sequence of steps: 1. Tools tab, 2. Meetings dropdown, 3. Downloads sidebar, 4. iPad Controller download button, and 5. Mac/Windows download buttons.



## 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.

Downloads

RingCentral Rooms

Webinar Settings

Meetings Reports

Add RingCentral Rooms With Google Service Account

Calendar Integration

IP Phone

Room Resource Delegate Account:

Google Service Account:

Service Account Private Key(.p12):

Room Name:

App Lock Code:

Country:

+ Add RingCentral Rooms With

Google Service Account

Exchange/Office 365

No Calendar Integration

Edit

Delete

Edit

Delete

.48085.0419

Edit

Delete

Add RingCentral Rooms With Exchange/Office 365

Calendar Integration

IP Phone

Room Resource Delegate Account:

Room Resource Delegate Password:

EWS URL:

Domain:

Room Name:

Room Resource Account in Exchange/Office 365:

App Lock Code:

Country:

Add RingCentral Rooms With No Calendar Integration

Calendar Integration

IP Phone

Room Name:

App Lock Code:

Country:

## 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.)

The screenshot shows the RingCentral Admin Portal interface. At the top, there's a navigation bar with the RingCentral logo, an 'Admin Portal' dropdown, and user information 'Dave | 020 8554 0023 Ext. 101'. Below this is a secondary navigation bar with tabs: Phone System, Users, Reports, Call Log, Billing, and Tools (which is selected). To the right of the Tools tab are icons for help, phone, and a document. On the left side, there's a sidebar with a 'Downloads' button and three menu items: 'RingCentral Rooms' (selected), 'Webinar Settings', and 'Meetings Reports'. The main content area is titled 'Rooms' and has sub-tabs for 'General Settings' and 'Display Settings'. Under the 'Rooms' tab, there's a search bar with the placeholder 'Search by Room name' and a 'Search' button. To the right of the search bar is a button 'Add RingCentral Rooms With' followed by a dropdown arrow. Below the search bar is a table with the following data:

Room Name	Type	App Lock Code	Creation Date	Current Version	Controller Version	
Room 2	No Calendar Integration	1212	Sep 15, 2016	5.1.98131.0706 (Mac) Downgrade	5.1.99701.0719	Edit Delete
Room 3	No Calendar Integration	8787	Sep 15, 2016	5.1.98131.0706 (Mac) Downgrade	5.1.97870.0704	Edit Delete

At the bottom right of the table area, there is another 'Add RingCentral Rooms With' button with a dropdown arrow.

## 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.

The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible. The navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Tools' dropdown is expanded, showing 'Meetings' as the selected option. On the left sidebar, 'RingCentral Rooms' is selected under the 'Downloads' section. The main content area shows the 'General Settings' tab for RingCentral Rooms. The settings are organized into sections: 'Enter email to get following event notifications:' with checkboxes for various alerts and a text field for 'Email recipients'; 'Advanced settings:' with checkboxes for 'Upcoming meeting alert', 'Start AirPlay service manually', 'Weekly system restart', 'Display meeting list on TV', 'Automatic direct sharing using ultrasonic proximity signal', and 'Display end-of-meeting experience feedback survey'; 'Support contact of your IT team:' with fields for 'Support Email' and 'Support Phone'; and a 'Background image for RingCentral Rooms' section with an 'Upload' button. A 'Save' button is at the bottom right.

## 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 customise 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 customise 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.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, a user status indicator 'Dave | 020 8554 0023 Ext. 101', and links for 'Get Help' and 'Log Out'. The main navigation menu on the left includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', 'Tools' (selected), and a 'Meetings' dropdown. The 'Tools' dropdown is open, showing 'Meetings' (selected) and 'Display Settings'. The 'Display Settings' page is titled 'Changes made here will be applied to all of your RingCentral Rooms' and includes a 'Restore to Original Settings' link. The page features a '1 Display' tab (selected), '2 Displays', and '3 Displays' tabs. A 'Save Changes' button and a 'Cancel' button are at the bottom right. The main content area shows three configurations for different participant counts: '1 participant' (Me, Shared Content), '2 participants' (Other, Shared Content), and '3 or more participants' (Gallery View, Shared Content). Each configuration shows a 'Share starts' arrow pointing from the participant view to the 'Shared Content' view.

## 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 customised 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:** customise settings for how registrants register for and join webinars.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Tools' dropdown menu is open, showing 'Meetings' as the selected option. The left sidebar contains 'Downloads', 'RingCentral Rooms', 'Webinar Settings' (highlighted with a red circle), and 'Meetings Reports'. The main content area displays the 'Webinar Settings' page. The 'Branding' section has two parts: 'Banner' and 'Logo', each with an 'Upload' button and a list of requirements. The 'Registration Settings' section has an 'Approval' dropdown set to 'No Registration Required'. The 'Email Settings' section has a 'Select Email Language' dropdown set to 'English (U.S.)' and several email templates with 'Edit' links.

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

### Registration Settings

Edit RingCentral Webinar registration settings to customise 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**.

## Registration

[Registration](#)[Questions](#)[Custom Questions](#)

### Approval

☒ **No Registration Required**

Registrants just enter their email address and display name at the time of the webinar to join.

☐ **Automatically Approve**

Registrants will automatically receive information on how to join the webinar.

☐ **Manually Approve**

The organizer must approve registrants before they receive information on how to join the webinar.

[Cancel](#)[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 customised questions that are either short answer or multiple choice.

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

### Registration

Registration

Questions

Custom Questions

Add Registration Fields

First Name, Last Name and Email Address required.

<input type="checkbox"/>	Field	<input type="checkbox"/> Required
<input type="checkbox"/>	Address	<input type="checkbox"/>
<input type="checkbox"/>	City	<input type="checkbox"/>
<input type="checkbox"/>	Country	<input type="checkbox"/>
<input type="checkbox"/>	Zip/Postal Code	<input type="checkbox"/>
<input type="checkbox"/>	State/Province	<input type="checkbox"/>
<input type="checkbox"/>	Phone	<input type="checkbox"/>
<input type="checkbox"/>	Industry	<input type="checkbox"/>
<input type="checkbox"/>	Organization	<input type="checkbox"/>
<input type="checkbox"/>	Job Title	<input type="checkbox"/>
<input type="checkbox"/>	Purchasing Time Frame	<input type="checkbox"/>
<input type="checkbox"/>	Role in Purchase Process	<input type="checkbox"/>
<input type="checkbox"/>	Number of Employees	<input type="checkbox"/>
<input type="checkbox"/>	Questions & Comments	<input type="checkbox"/>

Cancel

Save All

### Registration

Registration

Questions

Custom Questions

Create Your Own Question

You are prohibited from soliciting confidential personal information (such as credit card information or social security numbers) in your registration questions.

Type

☐ Short Answer

☒ Multiple Choice (One Answer)

Required

☒

Question

Would you attend a similar webinar?

Answer

Yes.

No.

Maybe.

Add another answer

Create

Cancel

Cancel

Save All

## View Meetings Reports

Meetings Reports helps administrators optimise 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.
- **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.

**RingCentral** Admin Portal Dave | 020 8554 0023 Ext. 101 Get Help | Log Out

Phone System Users Reports Call Log Billing Tools

**Meetings Reports**

- Daily Report**  
Show daily number of new users, meetings, participants and meeting minutes in a month.
- Usage Report**  
View meetings, participants and meeting minutes within a specified time range.
- Inactive Users**  
Show the users who are not active during a period.
- Webinar Report**  
View registration, attendee, performance, Q&A and poll reports for webinars.

---

**Usage Report** | Daily Report | Inactive Users

From: 07/08/2016 To: 07/09/2016 Go Export

Name	Meetings	Participants	Meeting Minutes
Denver Room	16	50	480
Grove Room	10	44	310
CA OPS	13	48	480

---

**Inactive Users** | Daily Report | Usage Report

From: 07/08/2016 To: 07/09/2016 Go Export

Name	Client Version	Last Login
CA OPS	4.1.50447.0513 (mac)	May 25, 2016 9:03 AM
Grove Room	4.1.48992.0429 (mac)	May 10, 2016 8:01 AM
Marketing Room	4.1.50686.0517 (mac)	May 27, 2016 5:42 AM



## 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)

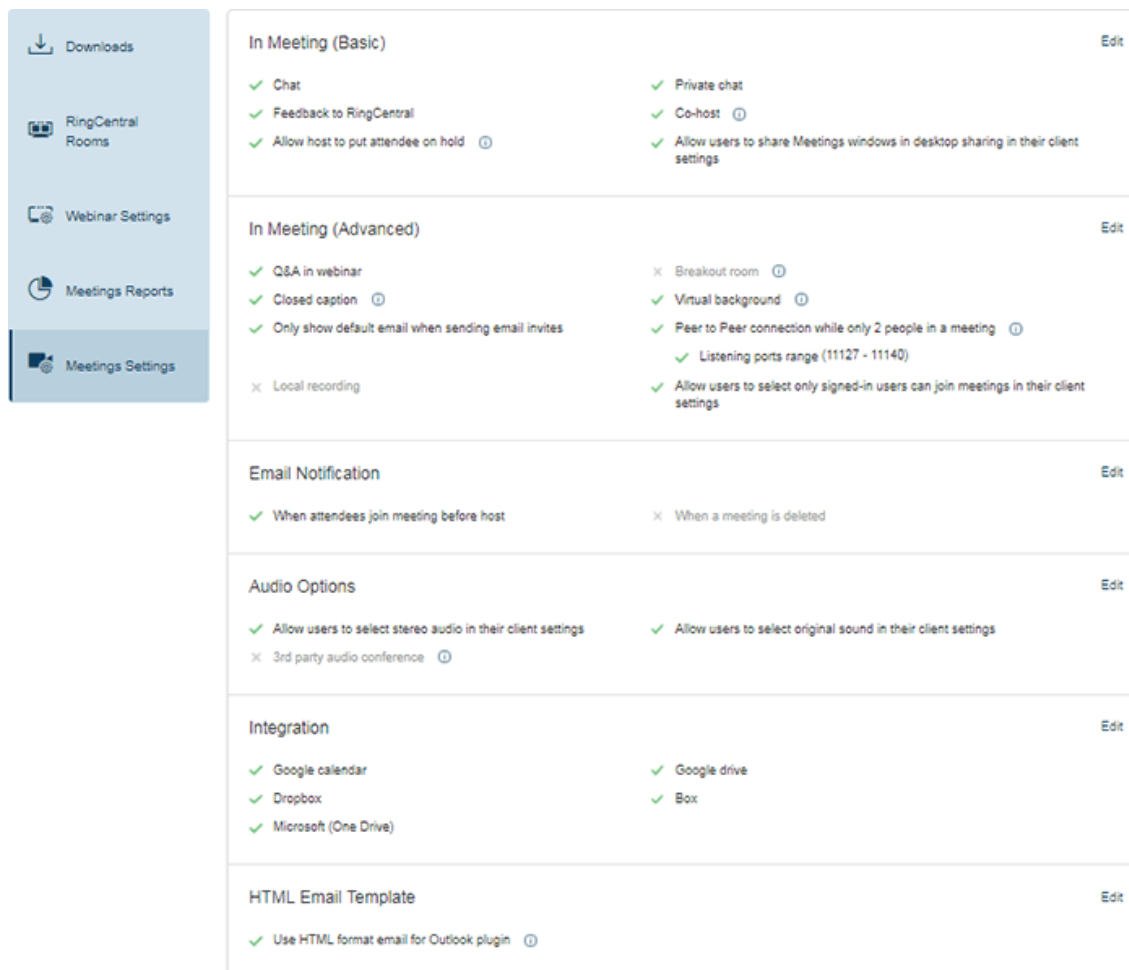
Configured in: the Admin portal in your online account.

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



Section	Settings	Action
In Meeting (Basic)	✓ Chat	Edit
	✓ Feedback to RingCentral	
	✓ Allow host to put attendee on hold ⓘ	
	✓ Private chat	
	✓ Co-host ⓘ	
	✓ Allow users to share Meetings windows in desktop sharing in their client settings	
In Meeting (Advanced)	✓ Q&A in webinar	Edit
	✓ Closed caption ⓘ	
	✓ Only show default email when sending email invites	
	✗ Breakout room ⓘ	
	✓ Virtual background ⓘ	
	✓ Peer to Peer connection while only 2 people in a meeting ⓘ	
	✓ Listening ports range (11127 - 11140)	
	✗ Local recording	
Email Notification	✓ When attendees join meeting before host	Edit
	✗ When a meeting is deleted	
Audio Options	✓ Allow users to select stereo audio in their client settings	Edit
	✗ 3rd party audio conference ⓘ	
	✓ Allow users to select original sound in their client settings	
Integration	✓ Google calendar	Edit
	✓ Dropbox	
	✓ Microsoft (One Drive)	
	✓ Google drive	
	✓ Box	
HTML Email Template	✓ Use HTML format email for Outlook plugin ⓘ	Edit

## 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.



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

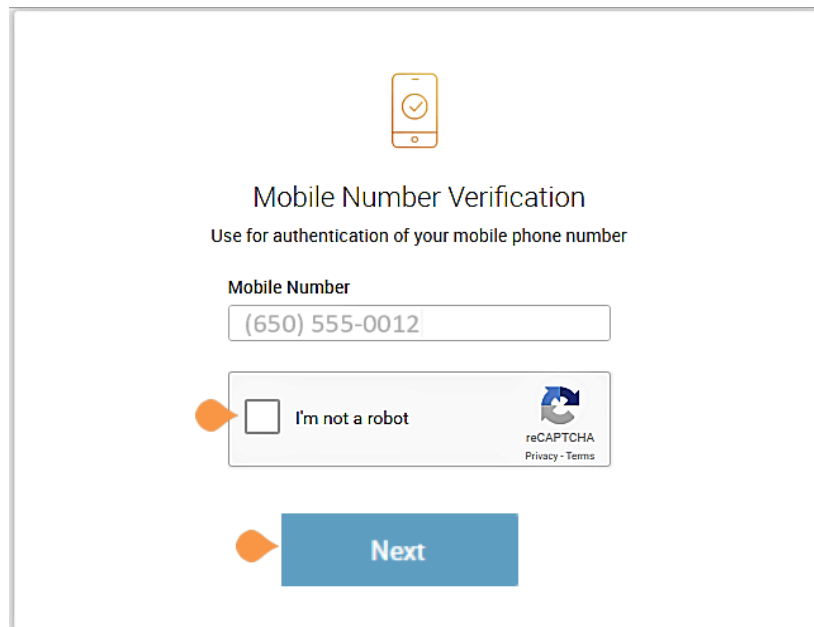
## Your Account Security

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**.



Mobile Number Verification

Use for authentication of your mobile phone number

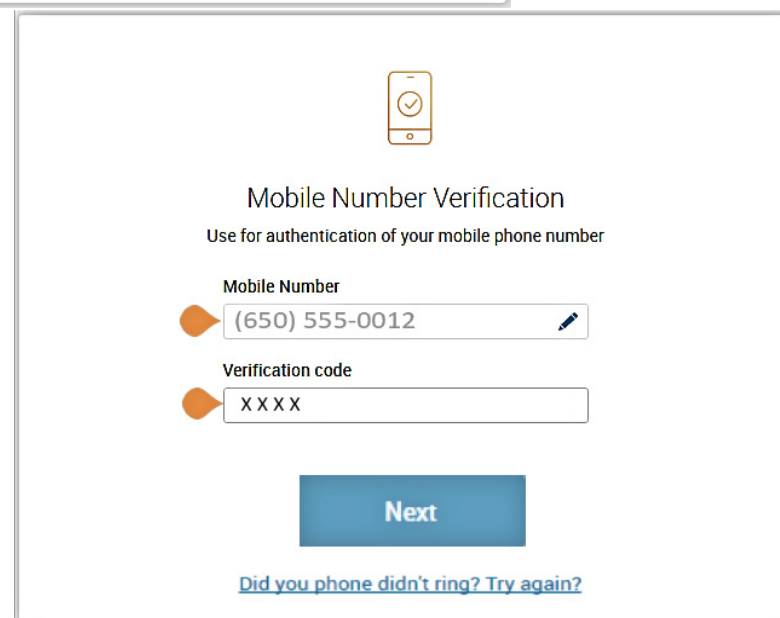
Mobile Number

(650) 555-0012

☐ I'm not a robot

reCAPTCHA  
Privacy - Terms

Next



Mobile Number Verification

Use for authentication of your mobile phone number

Mobile Number

(650) 555-0012

Verification code

X X X X

Next

[Did your phone didn't ring? Try again?](#)



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.

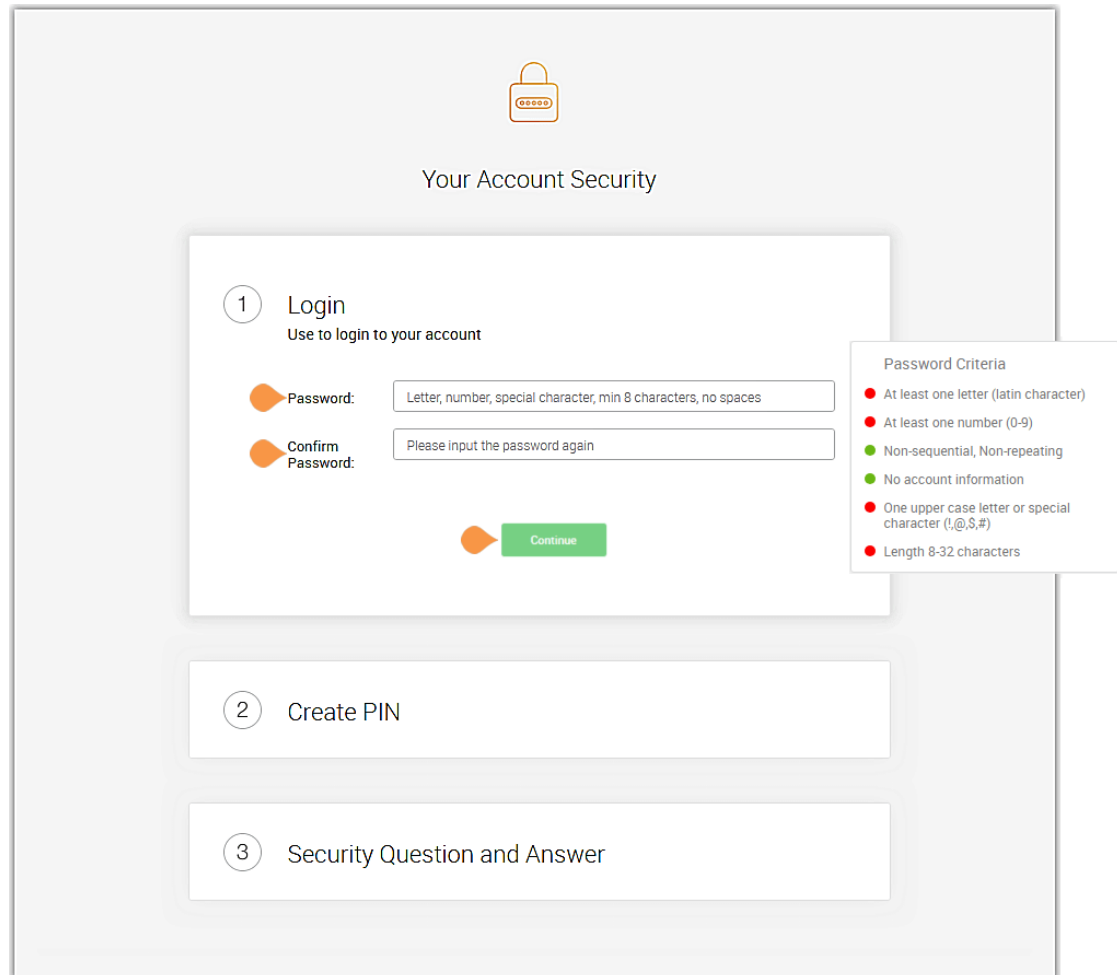
Follow the on-screen prompts. For each security setting, certain requirements must be met. For your convenience, these requirements are listed next to the setting as you enter the information.

**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**.



**Your Account Security**

**1 Login**  
Use to login to your account

**Password:** Letter, number, special character, min 8 characters, no spaces

**Confirm Password:** Please input the password again

**Continue**

**Password Criteria**

- At least one letter (latin character)
- At least one number (0-9)
- Non-sequential, Non-repeating
- No account information
- One upper case letter or special character (!, @, \$, #)
- Length 8-32 characters

**2 Create PIN**

**3 Security Question and Answer**

## Set Your PIN

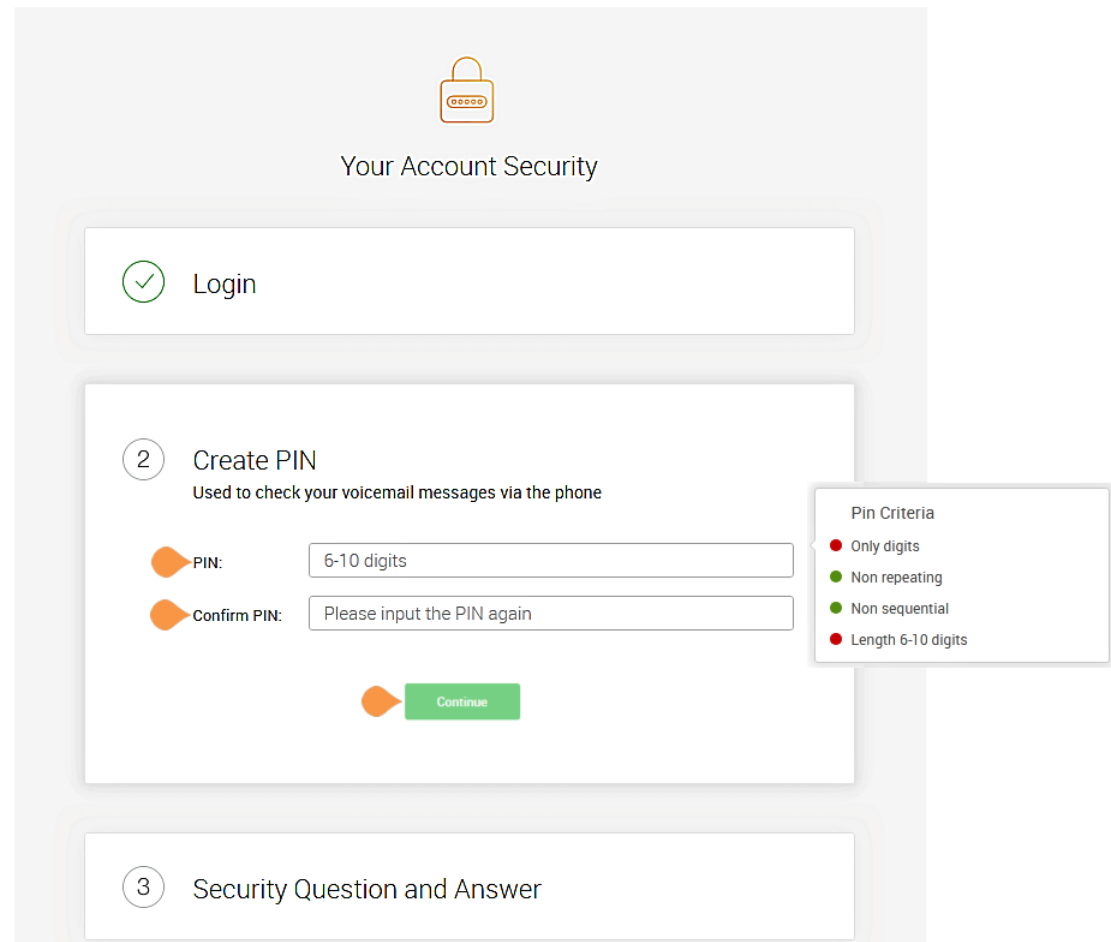
The next step in **Your Account Security** is to set your PIN.

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**.



The image shows a screenshot of the 'Your Account Security' setup screen. At the top, there is a lock icon and the title 'Your Account Security'. Below this, there are three steps: 1. Login (with a green checkmark), 2. Create PIN (the current step), and 3. Security Question and Answer. The 'Create PIN' step includes a sub-header 'Used to check your voicemail messages via the phone' and two input fields: 'PIN:' with a requirement of '6-10 digits' and 'Confirm PIN:' with a prompt 'Please input the PIN again'. A green 'Continue' button is at the bottom of the 'Create PIN' section. To the right of the 'Continue' button, a 'Pin Criteria' box lists four requirements: 'Only digits' (red dot), 'Non repeating' (green dot), 'Non sequential' (green dot), and 'Length 6-10 digits' (red dot).

**Your Account Security**

1 ☒ Login

2 ☐ **Create PIN**  
Used to check your voicemail messages via the phone

**PIN:** 6-10 digits

**Confirm PIN:** Please input the PIN again

**Continue**

**Pin Criteria**

- Only digits
- Non repeating
- Non sequential
- Length 6-10 digits

3 ☐ Security Question and Answer

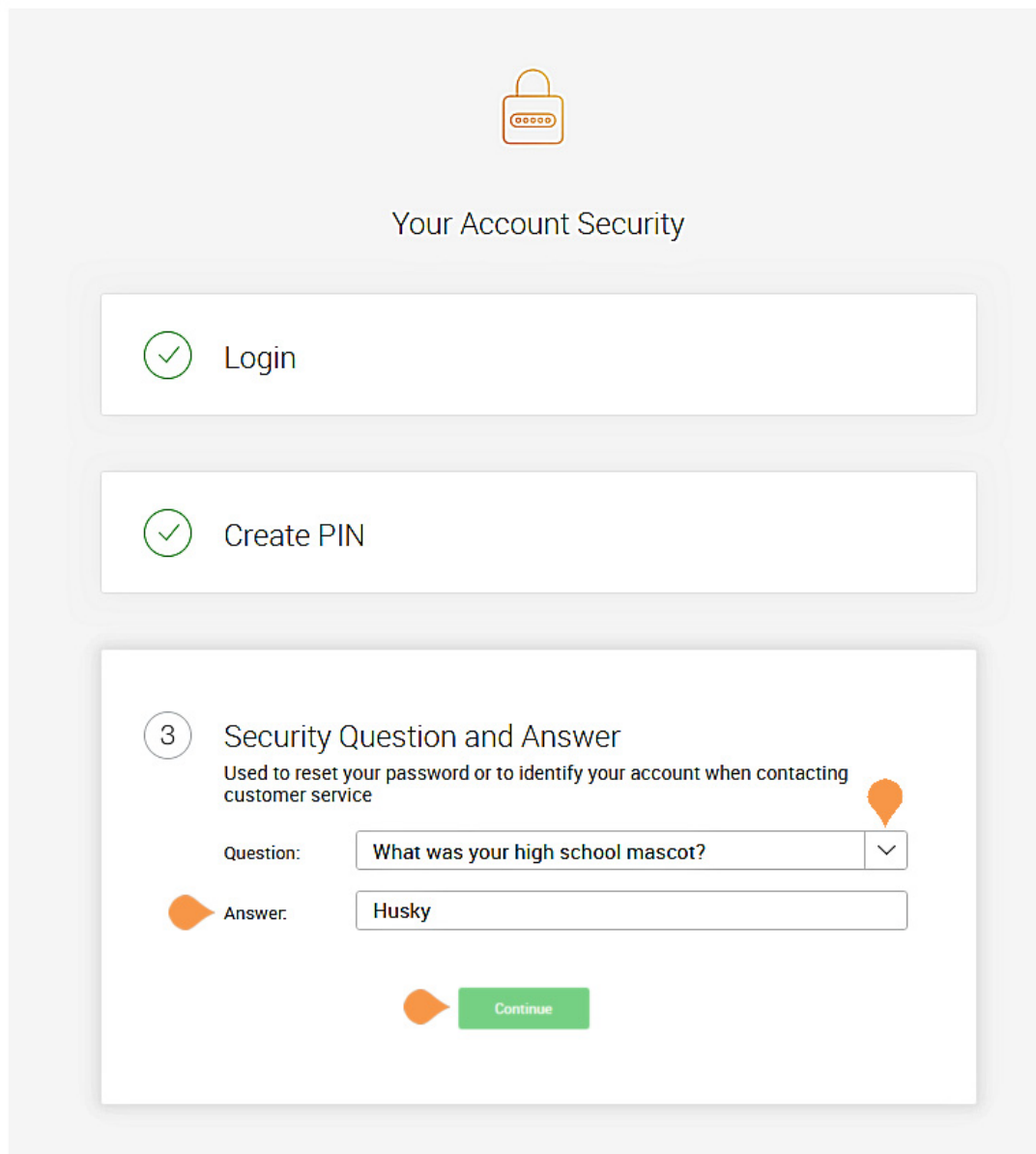
## Set Your Security Question and Answer


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.”



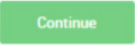


### Your Account Security

-  Login
-  Create PIN
-  **Security Question and Answer**  
Used to reset your password or to identify your account when contacting customer service

Question:

Answer:

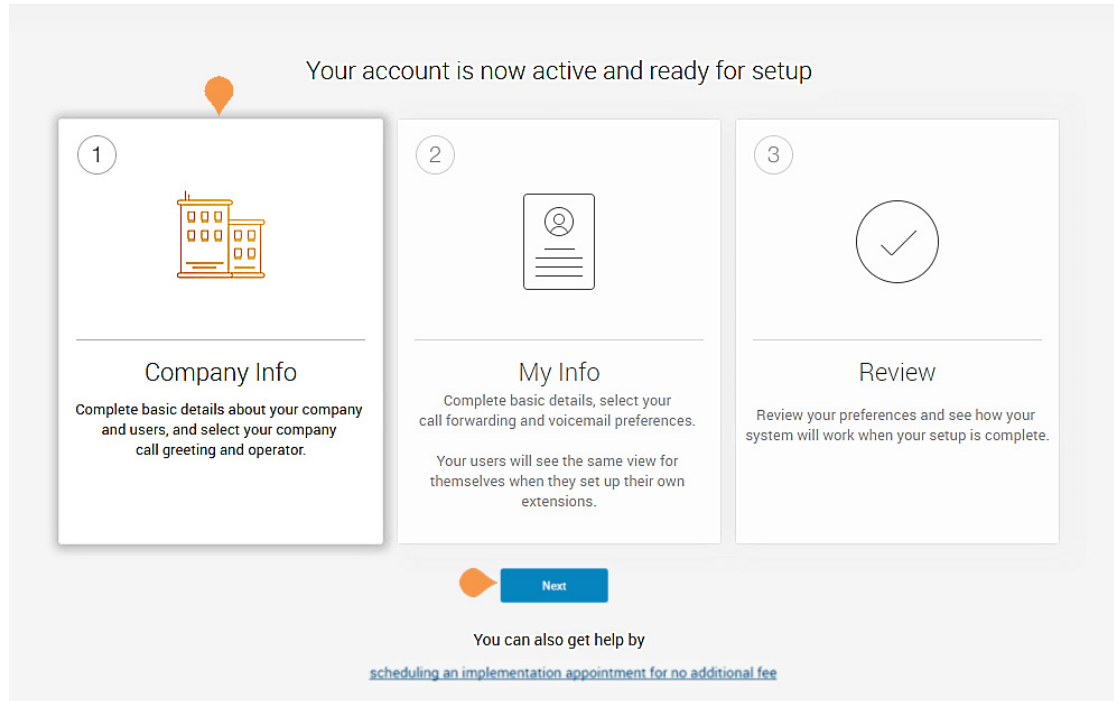


## Your Company Account is now ready for setup




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**.



Your account is now active and ready for setup

- 1**  
  
**Company Info**  
Complete basic details about your company and users, and select your company call greeting and operator.
- 2**  
  
**My Info**  
Complete basic details, select your call forwarding and voicemail preferences.  
Your users will see the same view for themselves when they set up their own extensions.
- 3**  
  
**Review**  
Review your preferences and see how your system will work when your setup is complete.

 **Next**

You can also get help by  
[scheduling an implementation appointment for no additional fee](#)

## 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 256.

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**.

The screenshot shows the 'Users' step in the RingCentral Express Setup for Admins. At the top, there are three tabs: 'Company Info' (selected), 'My Info', and 'Review'. Below the tabs, there are three sub-tabs: 'Users' (selected), 'Company Greeting', and 'Operator'. The main content area features an icon of three stylized human figures and the heading 'Users'. Below this, it says 'Complete these fields for your users so that:' followed by four bullet points, each with an icon: a telephone handset for 'You can assign an extension for them', a person with a gear for 'They can setup their own extension settings', a person with a headset for 'You can assign them to be the operator', and a grid of dots for 'Callers can reach them by the dial-by-name directory'. At the bottom, there is an orange speech bubble icon next to a blue 'Set Up Now' button, and a link for 'Skip This Step'.

Company Info My Info Review

Users Company Greeting Operator

Users

Complete these fields for your users so that:

- You can assign an extension for them
- They can setup their own extension settings
- You can assign them to be the operator
- Callers can reach them by the dial-by-name directory

Set Up Now

[Skip This Step](#)

## 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**.

×

User Details

All Users

Assigned (1)

Unassigned (9)

Q

1

First Name:

Julie

Last Name:

Fielding

Email:

julie.fielding@example.com

☐ Use email to log in

Contact Number:

(650) 555-0012

Extension:


101

Phone Assigned:

Polycom VVX311

Direct Number:

(650) 555-0012



## 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 customise 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 257.

To customise your company greeting, click **Customise**.

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**.

Company Info


My Info

Review

Users


[Company Greeting](#)

Operator




## Company Greeting

Which greeting would you like callers to hear when they dial your company number?



00:00 / 00:00



"Thank you for calling Company Name.  
If you know your party's extension you may dial it at any time.  
For the Operator **press 0**.  
For the Dial-By-Name directory **press 9**."

Customize

Keep Default

[Skip This Step](#)

## 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 **Customise** 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**.

The screenshot shows the RingCentral Admin interface. At the top, there are three tabs: "Company Info" (selected), "My Info", and "Review". Below these tabs are three sub-tabs: "Users", "Company Greeting", and "Operator" (selected). The main content area is titled "Operator Extension" and features a headset icon. Below the title, it states: "When callers dial your company number and **press 0**, by default they will be routed to:". This is followed by a horizontal line and the text "Julie Fielding" in a large font, with "Ext. 101" in a smaller font below it. At the bottom, there are two buttons: "Customize" and "Keep Default" (which is highlighted with an orange location pin icon). Below the buttons is a link that says "Skip This Step".



## Verify My Info Profile

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

**18.** Verify your information.

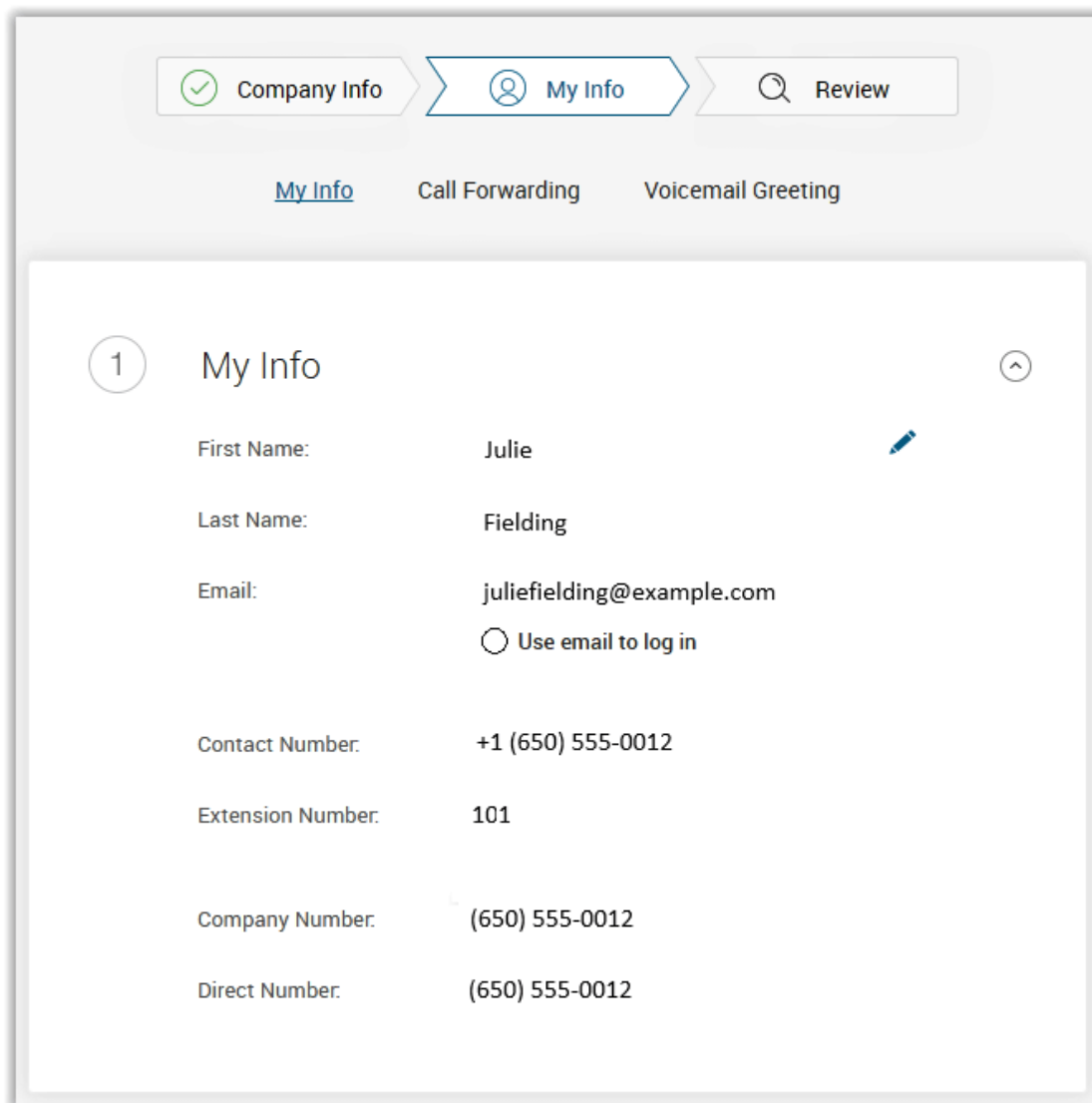
**If it is not correct, update it.**

- 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**.



✓ Company Info	👤 My Info	🔍 Review
----------------	-----------	----------

[My Info](#) Call Forwarding Voicemail Greeting

1

### My Info

⌵

First Name:	Julie	✎
Last Name:	Fielding	
Email:	juliefielding@example.com	<input type="radio"/> Use email to log in
Contact Number:	+1 (650) 555-0012	
Extension Number:	101	
Company Number:	(650) 555-0012	
Direct Number:	(650) 555-0012	

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**.

2 Regional Settings

Country: United States (1) ▼

Time Format: ☒ 12h (AM/PM) ☐ 24h

Time Zone: (GMT-08:00) Pacific Time (US & Cana... ▼

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**.


 Print


3

### Emergency Calling - Registered Location

Emergency Service dispatchers will send emergency first responders to this exact location. Where will you be using this phone?








**Important:** You must update this address every time you move your RingCentral IP phone or Emergency Dialing-Enabled Softphone to a different location. You may update the Registered Address at any time through <http://service.ringcentral.com>. Please note that it may take several hours for any address update to take effect.

Emergency calling may not be available in the event of an Internet or power outage, or if your broadband, ISP, or RingCentral Office service fails or becomes overloaded. VoIP emergency calls may not connect to your local emergency operators, may not transmit your location information, or may improperly ring to an administrative line. It is strongly recommended that you have an alternative means for placing emergency calls available at all times.

By clicking "Agree and Continue", I agree to the [Emergency Service Terms and Conditions](#).



## 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 264.
- 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.

✓ Company Info

**My Info**

🔍 Review

My Info


Call Forwarding

Voicemail Greeting

### Call Forwarding

You ordered a desk phone with RingCentral. All incoming calls will ring this phone. Would you like to add other phones to receive calls when you are away from your desk?

**Primary Phone:**



RingCentral Phone  
(Polycom VVX311)

Ring only my primary phone

**Yes, add phones**

[Skip This Step](#)

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**.

The screenshot shows the 'Add Phones' step in the RingCentral Express Setup process. At the top, there are three tabs: 'Company Info' (with a green checkmark), 'My Info' (with a blue outline and a person icon), and 'Review' (with a magnifying glass icon). Below these tabs are three sub-sections: 'My Info', 'Call Forwarding' (which is highlighted with a blue underline), and 'Voicemail Greeting'. The main content area is titled 'Add Phones' and indicates '1 of 2' steps. It prompts the user to 'Please select which additional phones you would like to receive calls'. A list of selected phones is shown, including a 'Polycom VVX311' with the number '(650) 555-0012'. Below this list is a dashed box containing a plus icon and the text 'Add Additional Phones'. At the bottom, there is a green 'Next' button and a link to 'Skip This Step'.

Company Info My Info Review

My Info Call Forwarding Voicemail Greeting

Add Phones 1 of 2

Please select which additional phones you would like to receive calls

Polycom VVX311 (650) 555-0012

+ Add Additional Phones

Next

[Skip This Step](#)

**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.*

Company Info My Info Review

My Info Call Forwarding Voicemail Greeting

### Call Handling

2 of 2

Which order would you like your devices to answer incoming calls?

☐ Simultaneously ☒ Sequentially

1 Polycom VVX311 (650) 555-0012

2 Home (650) 555-0010

Save

[Skip This Step](#)

## 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 265.

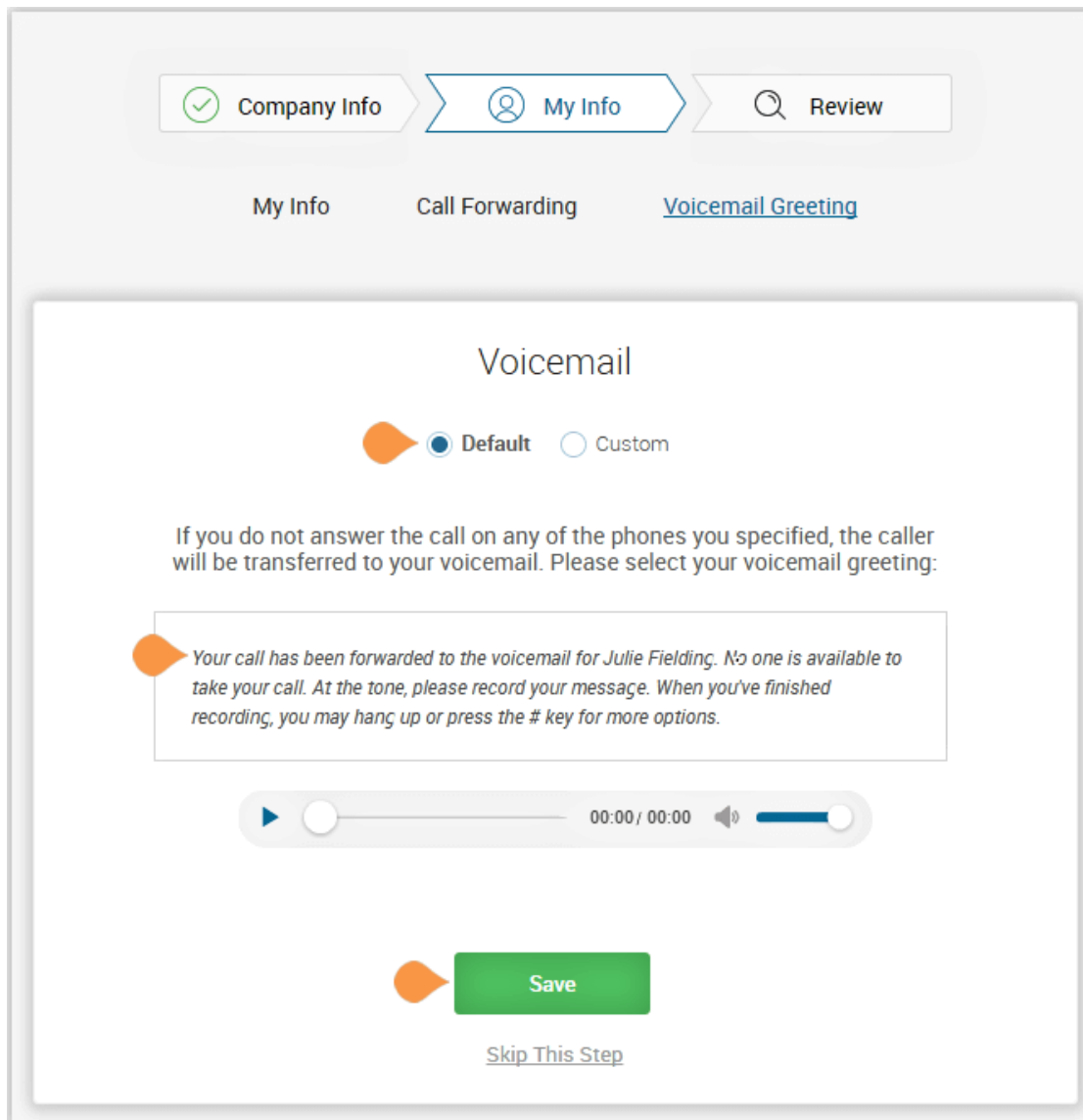
## Record or Import a Voicemail Custom Greeting

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**.



Voicemail

☒ Default ☐ Custom

If you do not answer the call on any of the phones you specified, the caller will be transferred to your voicemail. Please select your voicemail greeting:

*Your call has been forwarded to the voicemail for Julie Fielding. No one is available to take your call. At the tone, please record your message. When you've finished recording, you may hang up or press the # key for more options.*

00:00 / 00:00

**Save**

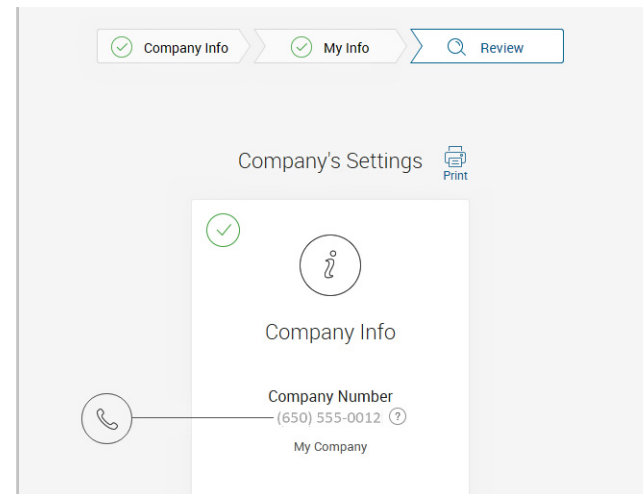
[Skip This Step](#)

## Review Your Company Settings

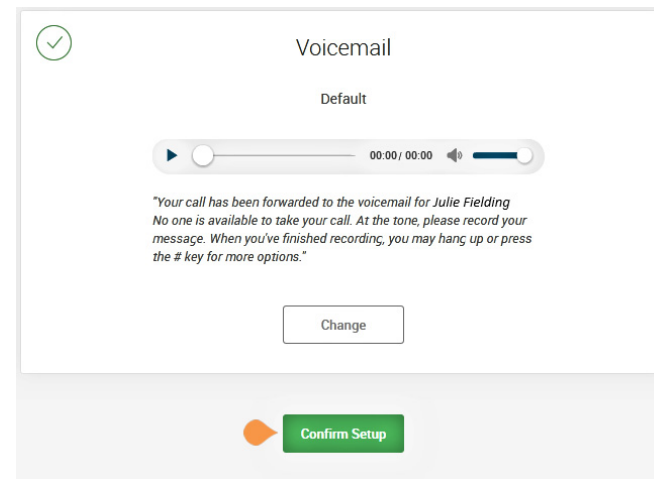
In this step, you'll review the settings set up. Check that these are correct. Continue scrolling to check or adjust all of the settings:

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

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



Continue to final step.





## 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.

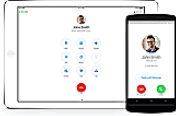
Continue to the following page.

### Use RingCentral Anywhere

Collaborate with coworkers and manage your phone system from any device

#### Free Smartphone App

Accessibility away from your desk




App for iPhone

App for Android

#### Free Desktop App


Accessibility on your computer



RingCentral for Windows

#### RingCentral for Google


Productivity and communication from your Chrome browser



Download RingCentral for Google

#### Glip Messaging


Collaborate anywhere:  
Free messaging and file sharing app  
RingCentral Glip included with your service



Find more at [glip.com](https://glip.com)

#### RingCentral meetings

Connect. Meet. Collaborate.



Download RingCentral for Windows

Finish

## 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.*


### Congratulations!

You've just completed the initial setup for your RingCentral phone.




You can start using the system right away, but to make sure you're getting the most out of your RingCentral subscription, schedule an Implementation appointment by clicking here.

The Implementation Advisor will train, explain, guide and assist at no additional cost.

 [Schedule Now](#)

View additional settings, configuration options, and access your full account to the RingCentral website.

 [Go to My 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

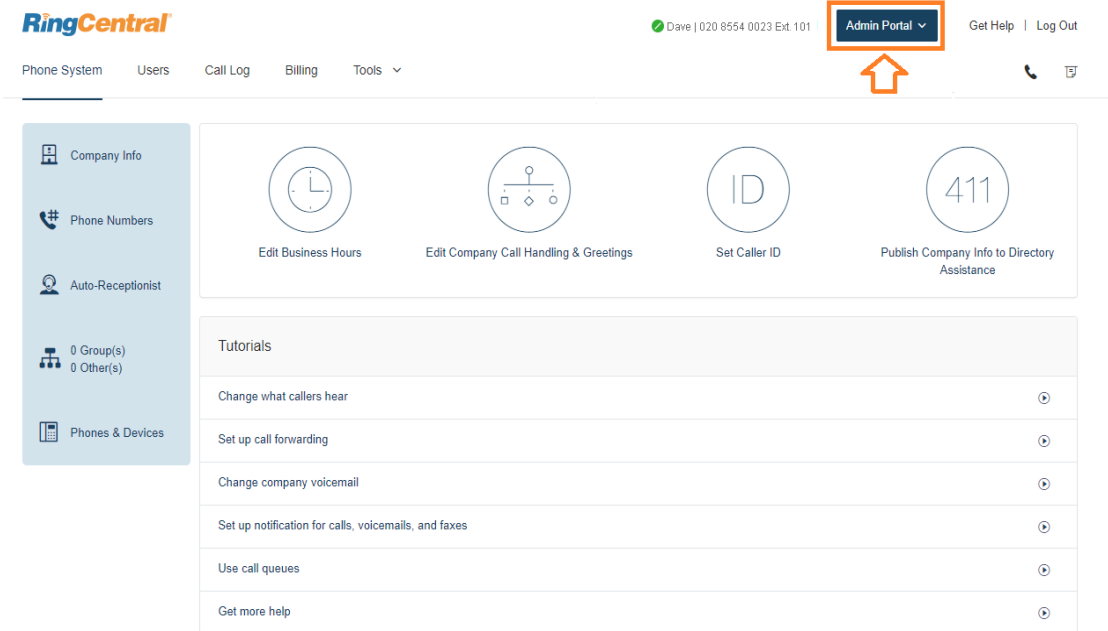
- Support **Videos**, click [here](#).

### 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.

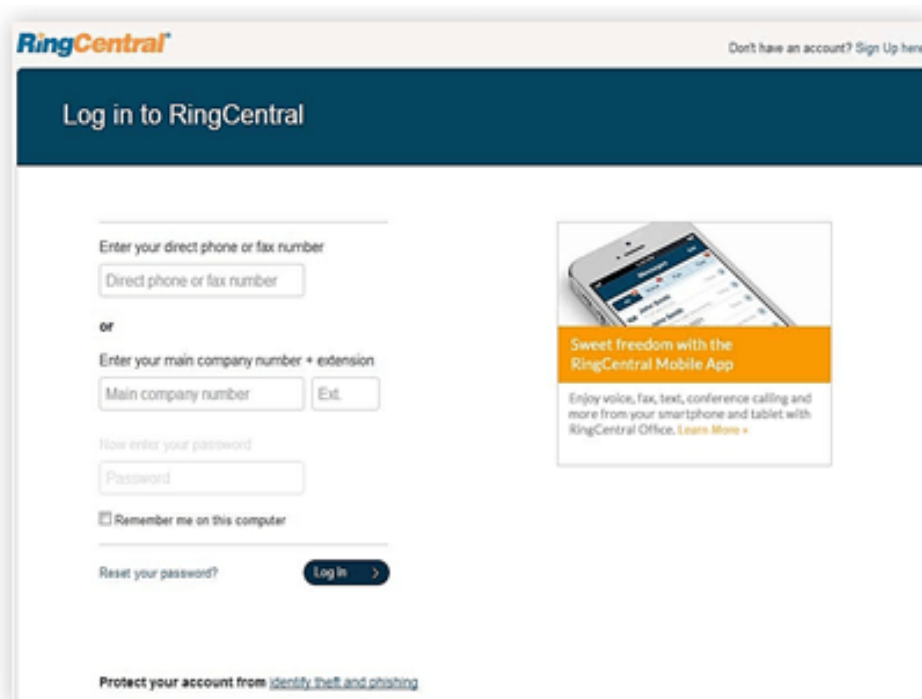
The customer Administrator begins by logging into their RingCentral Web account.

### Bulk Purchase of Users

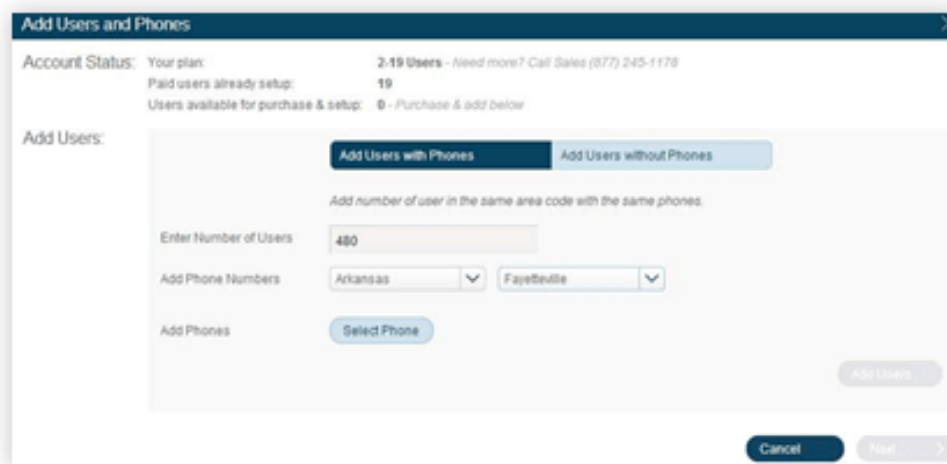
Go to **Settings > Phone System**. Select **Users**, then select **Add Users**. The Account Status at the top of the panel shows your current Plan.

- 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...*



The image shows the RingCentral login interface. At the top, there's a header with the RingCentral logo and a link "Don't have an account? Sign Up here!". Below this is a dark blue banner that says "Log in to RingCentral". The main content area has two input fields: "Enter your direct phone or fax number" and "Enter your main company number + extension". There's a "or" separator between them. Below these is a "Password" field and a "Remember me on this computer" checkbox. A "Log In" button is at the bottom right. To the right of the login fields is a promotional box for the RingCentral Mobile App, showing a smartphone and text: "Sweet freedom with the RingCentral Mobile App. Enjoy voice, fax, text, conference calling and more from your smartphone and tablet with RingCentral Office. [Learn More](#)". At the bottom, there's a security notice: "Protect your account from identity theft and phishing".



The image shows the "Add Users and Phones" dialog box. At the top, it says "Add Users and Phones" with a close button. Below this is the "Account Status" section, which includes: "Your plan: 2-19 Users - Need more? Call Sales (877) 245-1178", "Paid users already setup: 19", and "Users available for purchase & setup: 0 - Purchase & add below". The "Add Users:" section has two tabs: "Add Users with Phones" (selected) and "Add Users without Phones". Below the tabs, it says "Add number of user in the same area code with the same phones:". There are three input fields: "Enter Number of Users" (with the value 480), "Add Phone Numbers" (with dropdowns for "Arkansas" and "Fayetteville"), and "Add Phones" (with a "Select Phone" button). At the bottom right, there's an "Add Users" button. At the very bottom, there are "Cancel" and "Next" buttons.

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.

Account Status:

Your plan:

2-19 Users - Need more? Call Sales (877) 245-1178

Paid users already setup:

8

Users available for purchase & setup:

11 - Purchase & add below

Add Users:

Add Users with Phones

Add Users without Phones

Add number of user in the same area code with the same phones.

Enter Number of Users

Enter Number of Users

Add Phone Numbers

Select State/Province

Select Area Code/City

Add Phones

Select Phone

Add Users

Your Selection:

Number of Users	Location Area Code	Phone	Phones (One-time)
3	(650) - California	Cisco SPA-303 Desk Phone	\$357.00 (3 X \$119.00)
	> Edit	> Edit	

\*Total charges do not include taxes, fees and prorates.

	Quantity	Sub-total*
One Time Charges		
Phones	3	\$357.00
Recurring Charges		
New Users with Phones	3 X \$419.88	\$1,259.64
<b>Today's Estimated Total*:</b>		<b>\$1,616.64</b>

Cancel

Next >

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.


### Shipping

Ship attention to:


Select Address:  

Shipping Address:

City:

State/Province:  

Zip/Postal Code:

Country:  


Please select your shipping option:


☒ GROUND: \$18.95

☐ 2 DAY: \$34.95

☐ OVERNIGHT: \$52.95

Please allow 5-7 business days for Ground delivery.

 Back

Next 

☒ I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of \$1,623.89 to be charged to my credit card ending in [\*1111]. I further authorize the annually recurring charges of \$1,259.64 beginning on 7/30/2014 and continuing until canceled, which is in addition to my regular charges.

\* Prices do not include taxes or fees





## 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.

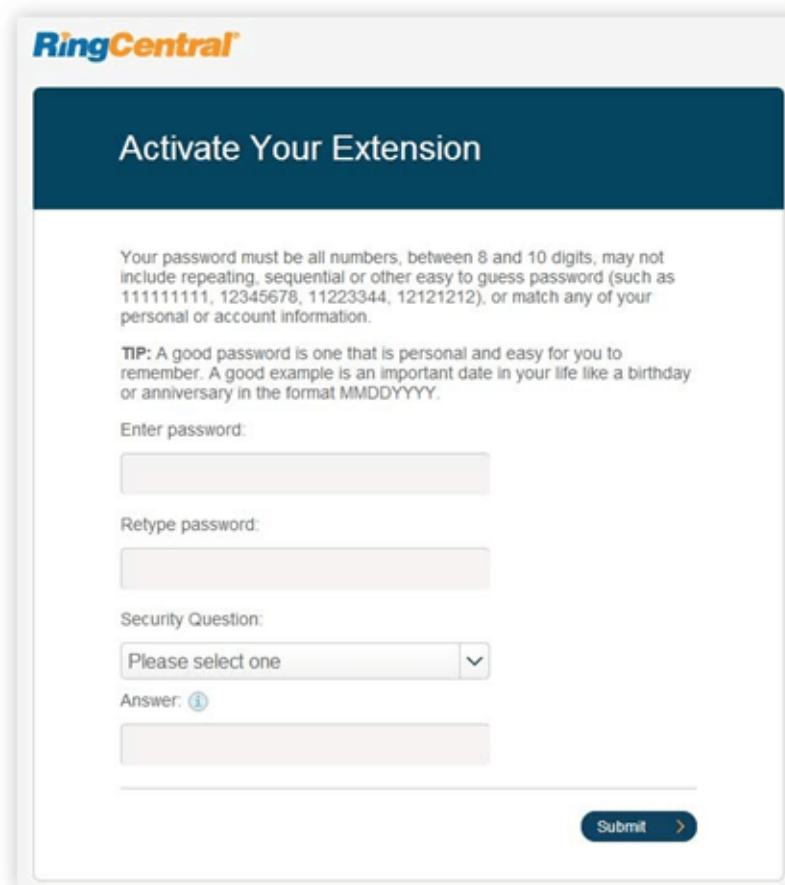
Common errors include:

- 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.



The image shows a screenshot of the RingCentral 'Activate Your Extension' form. The form is titled 'Activate Your Extension' in a dark blue header. Below the header, there is a text block explaining password requirements: 'Your password must be all numbers, between 8 and 10 digits, may not include repeating, sequential or other easy to guess password (such as 1111111111, 12345678, 11223344, 12121212), or match any of your personal or account information.' A 'TIP' follows: 'A good password is one that is personal and easy for you to remember. A good example is an important date in your life like a birthday or anniversary in the format MMDDYYYY.' The form contains three input fields: 'Enter password:', 'Retype password:', and 'Security Question:'. The 'Security Question' field is a dropdown menu with 'Please select one' and a downward arrow. Below the dropdown is an 'Answer:' field with an information icon. At the bottom right of the form is a 'Submit' button with a right arrow.

## 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:

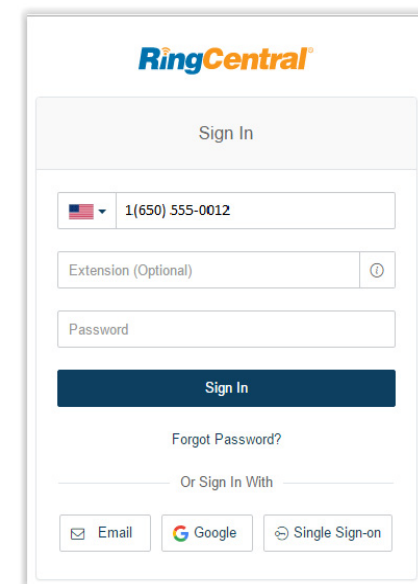
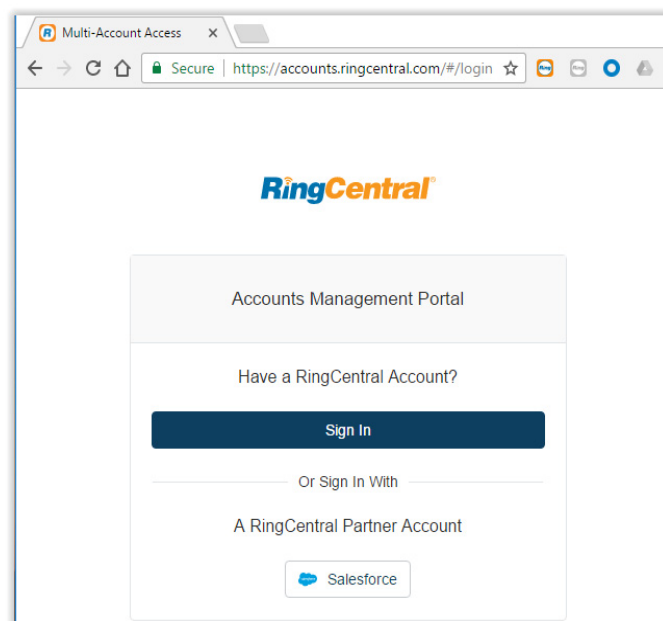
- Centralises access for customers with multiple RingCentral accounts
- Allows them to link all of their accounts in the Accounts Management portal.
- Allows company admins to access their RingCentral accounts from a single log in.
- Allows administrators to view services for all accounts from a single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

To access the management portal:

1. Go to [accounts.ringcentral.com](https://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.

**RingCentral** John Smith | Logout

Manage Linked Accounts

Search

Manage all the RingCentral accounts that you have access to.

<input type="checkbox"/> Account Name	Main Number	Owner	Ext.	Service Status <input type="button" value="Edit"/>
<input type="checkbox"/> New York <input type="button" value="Edit"/>	(888) 846-0010	John Smith	102	<input checked="" type="checkbox"/>
<input type="checkbox"/> Chicago	(866) 410-0001	Rachel Richards	101	Inbound Call <input checked="" type="checkbox"/> Outbound Call <input checked="" type="checkbox"/> Desk Phones <input checked="" type="checkbox"/> RingCentral for Desktop <input checked="" type="checkbox"/> service.ringcentral.com <input checked="" type="checkbox"/> Inbound Fax <input checked="" type="checkbox"/> OutboundFax <input checked="" type="checkbox"/> Inbound SMS <input checked="" type="checkbox"/> Outbound SMS <input checked="" type="checkbox"/>
<input type="checkbox"/> London	+44 (118) 250-0001	Michael Hoffman	301	
<input type="checkbox"/> Canada	(587) 404-0140	Charlie Lee	101	
<input type="checkbox"/> San Francisco	(866) 410-0004	Abby Brown	101	
<input type="checkbox"/> Leek	+44 (118) 762-0008	Jennifer Albertson	301	
<input type="checkbox"/> Austin	(888) 846-0010	Francisco Mendoza	101	

Total: 1998 Show 10 1 2 3 4 5 6 7 ... 200

## View Service Status





The account management tool reports status for the following services:

- Inbound Calls
- Outbound Calls
- Desk Phones
- RingCentral for Desktop
- service.ringcentral.com
- Inbound Fax
- Outbound Fax

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.

