

Customer Onboarding Guide

How to Successfully Set Up Your Service



Overview

Welcome

Thank you for choosing RingCentral as your phone system provider. This guide is designed to give you the information and tools you need to get started, and set your expectations of what's to come in the setup process.

Onboarding Process



- **Network Readiness**
Learn about network readiness and system requirements
- **Implementation Process**
View a checklist of steps in the implementation process
- **Number Transfer Process**
Transfer an existing number to your RingCentral service
- **Product Features**
Learn about powerful features in your account and how to use them
- **Additional Resources**
Learn about Customer Support, RingCentral Community, and more
- **Voice of the Customer Program**
Tell us about your RingCentral experience

3 Tips to Prevent Implementation Roadblocks & Delays:

1. **Ensure someone is available to accept your FedEx shipment of phone orders.**
Your phones should arrive in 1-5 business days.
2. **Make sure your network is ready.**
Review the Network Readiness Steps to Success. Verify that your network meets the minimum recommended requirements prior to your implementation date.
3. **Ensure that you (*and any other points of contact*) are available for your implementation appointments.**

Network Readiness

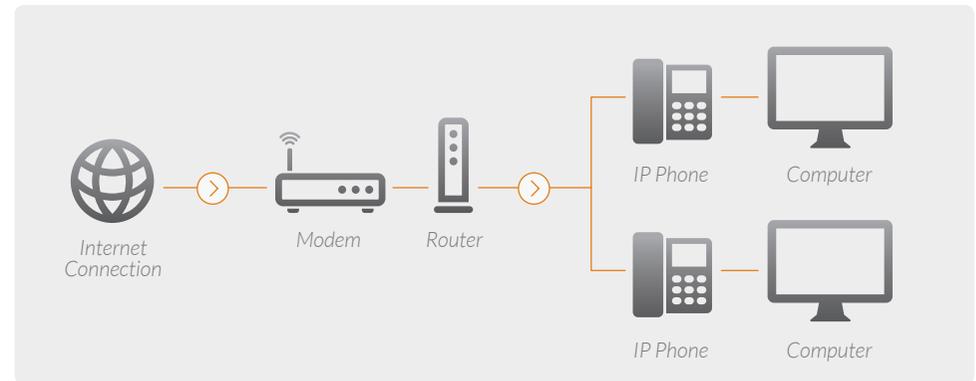
RingCentral provides reliable, high quality voice service. Your local network, your Internet connection, and your router devices all contribute to overall call quality.

Follow these steps to success:

- 1 Test your Internet Connection Bandwidth**
Use the following tests to make sure your Internet has enough capacity to deliver high call quality:
 - [Capacity Test](#)
 - [VoIP Quality Test](#)
- 2 Configure Your Modem**
Verify that your modem is in IP pass-through or bridge mode.
Note: Contact your Internet Service Provider for instructions.
- 3 Buy/Configure Your Router**
[Find your router here](#) and configure according to the instructions.
Note: You may need to purchase a new router.
- 4 Plug in Your Phones**
For best voice performance, plug your phones directly into the network, then plug your computer network cables into the back of the phone.

Recommended Network Setup

In order to have your phone system run successfully it is essential to have your network set up correctly.



Network Readiness

Getting Help with Network Readiness

If you need help configuring or setting up the computer network at your location we recommend you get local help. Search “**Computer Networking in [Your Town]**.”

If you have call quality issues, gather this information to help us help you.

What symptoms are you experiencing?

- Choppy sound
- Dropped calls
- Static
- One way audio or no audio

When did it happen?

- Date and time of the call
- To and from information.

You can create a case on <http://success.ringcentral.co.uk/RCContaktSupp> or talk to your Implementation Advisor.

Softphone Requirements

RingCentral Softphone enables complete call management from any PC. To use the RingCentral Softphone* with Microsoft® integration on your computer, you need to meet the following specifications:

Windows® XP, Vista, 7, 8

- Pentium or above processor or compatible
- Minimum of 512MB of memory
- 200MB of hard drive space

Mac OS 10.4 Tiger or latest

- G4 500 Mhz or any Intel processor
- 512 MB of memory
- 30 MB of hard drive space

**See the Product Features section to learn more about the RingCentral Softphone.*

Implementation Process

Implementation Overview

RingCentral offers implementation services to get your account up and running. We'll walk you through the physical setup of your phones and help you configure the settings for each of your employees. Implementation services are free of charge to RingCentral Office accounts with two or more users.

The process may take up to 30 days depending on your readiness and the complexity of your needs.

Your Success Team

The following RingCentral contacts are here to assist you throughout the implementation process:

- **Implementation Advisor:** Your Implementation Advisor meets with you over the phone to provide training, and helps you successfully set up your account.
- **Account Executive:** Your Account Executive provides assistance for product and pricing information.

Implementation Process

These are the steps that take place during the Implementation process:

1 Schedule Implementation

- Your Account Executive will schedule the implementation with one of our Implementation Advisors at a time suitable to you
- For scheduling concerns, please call 0800 098 8136

2 Attend Training Session #1 (1 hour)

Your first training session covers the following:

- Review network information such as modem, router, Internet provider, verified up/down speed
- Discuss how you use your system and how you would like your phone system to work
- Learn how to use the Mobile App.
- Schedule Training Session #2

3 Attend Training Session #2 & Review (1 hour)

Your second training session and review covers the following:

- Review implementation progress and confirm that your system is working properly
- Confirm and review Advanced Rules and Call Handling
- Review the Number Transfer process

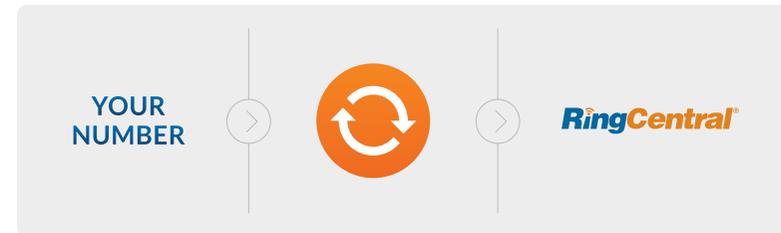
Number Transfer Process

Transfer Your Existing Number

If your existing phone number is still with your previous provider, you can transfer it to your RingCentral account.

Transfer Process

- 1** Submit a transfer request online for Local, Free-phone, and Non-Geographic numbers from your RingCentral account.
The information you enter must match exactly what's on record with your current phone service provider.
- 2** Follow the instructions on the screen in your online account.
- 3** RingCentral will send your transfer request to your current service provider.
- 4** Set up your greetings, answering rules, etc. for your RingCentral account.
You can make and receive calls (if part of your service plan) on your temporary RingCentral phone numbers until the transfer is complete.
- 5** RingCentral will notify you by email when your transfer is complete.
At that point, your transferred number(s) will be ready to use with RingCentral.



Number Transfer Do's and Don'ts

DO be exact.

Your information must match exactly what's on record with your current phone service provider. If the information provided does not match, your transfer will be delayed. Refer to your current bill or contact your current service provider.

DO remove special features.

Call your current provider and cancel special features (such as remote call forwarding, distinctive ring) before submitting your transfer request. Cancel special features only – not the entire service.

DO cancel any open pending service orders.

Contact your current provider to cancel any open service orders or confirm they're complete before placing the transfer request.

DON'T cancel your old phone service.

Wait until after your transfer is complete to cancel your old service.

DON'T lose your broadband service.

Call your service provider to get a new phone number for your broadband line before you submit your transfer request. Otherwise, you risk losing your broadband service.

Number Transfer Process

Number Transfer Checklist

Here are a few items you'll need to have in order to begin the number transfer process:

- Account Number**
Your account number supplied by your provider.
- Customer name**
The name as it appears with your current service provider.
- Company name**
The name as it appears with your current service provider.
- Installation address**
The address at which your line or service is installed. This may or may not be the same as your billing address.
- Main Billing Telephone Number**
This is the main telephone number on your current provider.
- Phone numbers**
A list of the phone numbers you will be transferring.

Common Terms

The following terms come up frequently during the number transfer process:

Letter of Authorisation: A document that gives RingCentral permission to transfer your number.

Main Billing Number: The primary phone number that is used for billing.

Pending Service Orders: Changes to your phone service that haven't gone through yet. They could be requests to add or remove special features or modify your company name or billing address.

Special Features: Additional features you can order for your phone service such as Centrex, remote call forwarding, or distinctive ring.

DDI Range: Telephone numbers within a range associated with the main number. For example, numbers ending from 001 to 010.

CUPID: Communications Providers Porting Indicator – the three digit code that is used to identify the range holder (RH) or losing communication provider (LCP) that RingCentral needs to contact.

Product Features

Your RingCentral Office account includes powerful features that make it easy for you to communicate with colleagues and clients. The following chart highlights the features provided with each product.

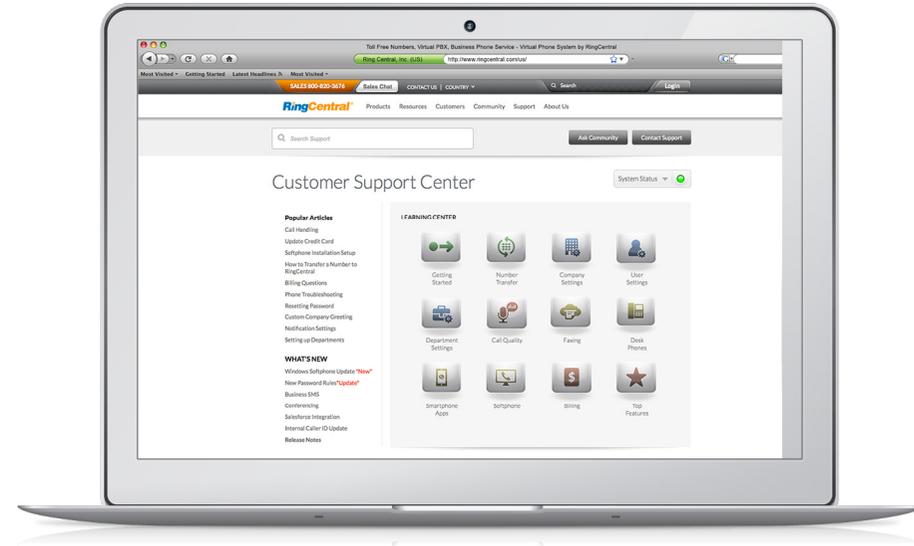
	Entry Edition	Standard Edition	Premium Edition	Enterprise Edition
 <p>Mobile Apps Take your business anywhere with the RingCentral smartphone app. Download for iPhone and Android.</p>	✓	✓	✓	✓
 <p>Softphone RingCentral Softphone enables complete call management from any PC.</p>	✓	✓	✓	✓
 <p>Internet Fax Send faxes from a range of sources and devices.</p>	✓	✓	✓	✓
 <p>Conferencing With RingCentral Conferencing, set up and join conference calls anywhere, anytime.</p>		✓	✓	✓
 <p>Salesforce Integration Get seamless integration between your RingCentral phone system and Salesforce CRM.</p>			✓	✓
 <p>Automatic Call Recording Automatically record both incoming and outgoing calls for yourself and your employees.</p>			✓	✓

Additional Resources

Customer Support Centre

The [RingCentral Customer Support Centre](#) includes search capabilities, a Learning Centre with step-by-step videos, how-to articles, and the ability to submit a case. Easily find the answers you need:

- **Powerful Search Capabilities:**
Get answers to your questions from our online Knowledge Base with hundreds of articles on key topics.
- **Learning Centre:**
Find Step by step videos & how to articles to help you get going.
- **Case Submission:**
[Create a case online](#) and get real-time updates from an expert.



Ask the Community

Get the answers you need and exchange product knowledge in the [RingCentral Online Community](#), where you have access to the latest support information.

Voice of the Customer Program

RingCentral is dedicated to delivering a world-class experience to our customers, and your feedback is critical to that end. From time to time, you may receive short surveys to provide feedback about your Sales and Support interactions. We also conduct a 3-month and yearly customer experience survey to ensure that we are meeting your expectations.

Your candid response about our products and services are used to ensure we are meeting your business needs. We are committed to investing in improvements that positively impact the customer experience.

Rest assured, your feedback is heard and valued at RingCentral.

