

# RingCentral Office<sup>®</sup>

## Admin Guide



8	<b>Getting Started</b>	
9	<b>Introduction</b>	
10	<b>How to Access Your Account</b>	
10	Single Sign-on	
10	Account Validation	
11	Use a Corporate Email Address to Log In	
12	Use a Google Account to Log In	
13	<b>Admin Homepage</b>	
13	Main Functions	
13	Admin Portal	
13	My Extension	
14	<b>Product Help</b>	
15	<b>Do Not Disturb</b>	
16	<b>Audio Conference</b>	
17	Launch the Conferencing Application	
18	<b>Conference Commands</b>	
18	Preventing Music-On-Hold	
19	<b>RingOut</b>	
20	<b>FaxOut</b>	
21	<b>Phone System</b>	
22	<b>Phone System</b>	
23	Company Info	
23	Manage Sites with Multi-Site Support	
24	Company Address	
25	Caller ID Name	
26	Directory Assistance	
27	<b>Phone Numbers</b>	
28	Add Company Numbers	
29	Add Assigned Numbers	
30	Forward a Number	
31	View Unassigned Numbers	
32	View Transferred and Vanity Numbers	
34	<b>Auto-Receptionist</b>	
35	<b>Auto-Receptionist Settings</b>	
35	Manage Auto-Receptionist with Multi-Site Support	
36	<b>Company Business Hours</b>	
38	Set a Company Greeting	
39	<b>Regional Settings</b>	
41	<b>Operator Extension</b>	
42	<b>Zero Dialing</b>	
42	Removing a Destination Extension	
44	<b>On-demand Call Recording</b>	
44	Choose an On-demand Call Recording Announcement	
45	Enable On-demand Call Recording Announcement	
46	Choose an Automatic Call Recording Announcement	
48	Enable an Automatic Call Recording Announcement	
49	<b>Planning for Interactive Voice Response (IVR)</b>	
49	Single-Location IVR Example	

49	Multiple-Locations IVR Example	76	Custom Rule Condition - Date and/or Time
50	<a href="#">Switch to Multi-level IVR Mode</a>	77	Custom Rule Call Handling Definitions
53	<a href="#">Import or Export XML Files</a>	78	Custom Answering Rule List
53	Download a Sample XML File	78	Add Custom Rules
54	Export an XML File	78	Validate Custom Rules
55	Import an XML File		
56	<b>IVR Menus*</b>	79	<b>Call Groups</b>
56	<a href="#">Add an IVR Menu Group</a>	80	<b>Groups Listing</b>
57	Configure an IVR Menu	81	<a href="#">Call Queue Group</a>
57	Configure Extension Info	82	<a href="#">Call Queues</a>
59	<a href="#">Visual IVR Editor</a>	82	Add a Call Queue Group
59	Launch the Visual Editor	83	Configure a Call Queue
60	Create a New IVR Menu or Open an Existing IVR Menu	83	Call Queue Info
64	Edit an Existing IVR Menu with the Visual IVR Editor	84	Configure Call Queue-to-Queue Overflow
65	<a href="#">Prompts</a>	84	Overflow Call Queues
65	Record an Audio Prompt	85	Add a Direct Number
66	Select Prompt Mode: Audio	86	Call Queue Greetings
67	Select Prompt Mode: Text-to-Speech	86	Set a Call Queue Greeting
68	<a href="#">Recording Greetings and Messages</a>	87	Incoming Call Handling
68	Import a WAV file for Your IVR Prompt	88	Messages and Notifications
69	Record a Prompt over the Phone	88	Set a Voicemail Greeting
70	Record a Prompt Using Your Computer Microphone	89	Message Recipient
71	<a href="#">Custom Rules</a>	89	Set the Message Recipient
72	Create a Custom Rule	90	Voicemail Preview*
74	Custom Rule Condition - Caller ID	91	Notifications
75	Custom Rule Condition - Called Number	92	<a href="#">Paging Only Group</a>

\*Not available for all users. Please see page for more details.

93	<b>Paging Only*</b>	115	<b>Message-Only Extension</b>
93	Add a Paging Only Group	116	<b>Message-Only Extensions</b>
94	Configure a Paging Only Group .	116	Add a Message-Only Extension
95	<b>Shared Lines Group</b>	117	Configure a Message-Only Extension
96	<b>Shared Lines*</b>	117	Extension Info
96	Add a Shared Lines Group	118	Add a Direct Number
97	Configure a Shared Lines Group	119	Message Recipient
98	Add a Direct Number	120	Messages and Notifications
99	Greeting and Blocked Calls	120	Set a Voicemail Greeting
100	Set Custom Music on Hold	121	Set Voicemail Preview*
101	Call Handling	122	Notifications
102	Outbound Caller ID	123	<b>Announcements-Only Extension</b>
103	Messages & Notifications	125	Edit Announcements-Only Extension Info
103	Voicemail Greeting	126	Add a Direct Number
104	Message Recipient	127	Set an Announcement
105	Voicemail Preview*	128	<b>Limited Extension</b>
106	Notifications	129	<b>Limited Extensions</b>
108	<b>Park Location Group</b>	129	Add a Limited Extension
109	<b>Park Locations</b>	131	Assign a Limited Extension
109	Add a Park Location	132	Edit Limited Extension Info
110	Configure a Park Location	133	<b>Phones and Devices</b>
111	Add Users to a Park Location	134	<b>View and Edit Devices</b>
111	Enable this Park Location	134	<b>Search Devices</b>
112	<b>Call Monitoring Group</b>	134	<b>Add a Device</b>
114	Add and Configure a Call Monitoring Group*		

\*Not available for all users. Please see page for more details.



135	Add a User Phone	154	Export a User List
137	Add a Hot Desk Phone	155	Bulk Edit User Information
138	Add a Paging Device	<b>156</b>	<b>Managing Active User Extensions</b>
140	Add an Unassigned Phone	156	Convert a Virtual Extension to a Digital Line
<b>142</b>	<b>Enabling Video Calls</b>	<b>157</b>	<b>Call Forwarding for an Unreachable Phone</b>
<b>143</b>	<b>Hot Desking</b>	157	Feature Activation
<b>144</b>	<b>Managing Hot Desking</b>	<b>158</b>	<b>Configuring Call Forwarding for Unreachable Phone</b>
144	Types of Hot Desk Phones	<b>159</b>	<b>User Settings</b>
144	Phone Support and Setup	<b>160</b>	<b>User Settings</b>
144	Using Hot Desking for Limited Extension	<b>161</b>	<b>User Details</b>
144	Managing Hot Desking Devices	<b>162</b>	<b>Phones &amp; Numbers</b>
145	Enabling a Limited Extension Phone for Hot Desking	<b>163</b>	<b>Screening, Greeting &amp; Hold Music</b>
146	Convert an Unassigned Phone to a Hot Desk Phone	<b>164</b>	<b>Call Handling &amp; Forwarding</b>
147	Unassign a Hot Desk Phone	<b>164</b>	<b>Messages and Notifications</b>
147	Log out a Hot Desk Phone	<b>165</b>	<b>Outbound Calls/Faxes</b>
148	Set the Hot Desking Session Timeout	165	Outbound Caller ID
148	No Timeout	166	Outbound Fax Settings
<b>149</b>	<b>Assisted Provisioning</b>	<b>167</b>	<b>Roles and Permissions</b>
<b>150</b>	<b>User Management</b>	<b>168</b>	<b>Manage Roles and Permissions</b>
<b>151</b>	<b>User Management</b>	<b>168</b>	<b>Predefined Roles</b>
151	View Users with Extensions	<b>168</b>	<b>Custom Roles*</b>
151	View Unassigned Extensions	<b>169</b>	<b>Manage Permissions in Multi-Site Accounts</b>
152	Add Users with Phone Devices	<b>170</b>	<b>Assign Users to a Role</b>
153	Add Users without Phones		
<b>154</b>	<b>Manage Users and Extensions</b>		

\*Not available for all users. Please see page for more details.

171	Modify a User's Role	199	Service Plan
172	Create a New Role*	199	View or change your service plan
175	Setting a Default Role	200	View Service Plan Options
176	<b>User Groups</b>	201	Active User Extensions
177	<b>Manage User Groups*</b>	201	View Active User Extensions Usage and History
178	User Group Management Tasks	202	Payment Method
179	Create a User Group	203	International Calling
181	Edit a User Group	204	Professional Services
182	<b>Templates</b>	206	Add Large Meeting Licenses
183	<b>Templates*</b>	207	Add RingCentral Webinar Licenses
183	Create a Template for User Settings	207	Add a RingCentral Webinar License
189	Create a Template for Call Handling Settings	208	Add RingCentral Rooms Licenses
190	Apply a Template to Users	209	Add a RingCentral Rooms license
191	<b>Reports</b>	210	Add RingCentral Room Connector Licenses
192	<b>Live Reports</b>	211	Manage Device Orders
193	<b>Historical Reports</b>	214	Cost Center Management*
194	Generate and Export Reports	215	Update and Add Cost Center Codes
196	<b>Call Log</b>	216	CloudConnect
197	<b>Call Log Description</b>	217	Live Reports
198	<b>Billing</b>	218	<b>InContact Interconnect Licenses</b>
199	<b>Billing</b>	219	<b>Tools</b>
		220	Tools
		221	Archiver
		222	Appearance

\*Not available for all users. Please see page for more details.

<b>223</b>	<b>Session Timeout</b>	<b>244</b>	<b>Introduction to Managing Meetings</b>
<b>224</b>	<b>Account Federation</b>	244	<a href="#">System Requirements for RingCentral Rooms</a>
225	<a href="#">Setting up Account Federation</a>	245	<a href="#">Download RingCentral Rooms Software</a>
<b>226</b>	<b>Single Sign-on*</b>	245	Install the RingCentral Rooms software:
<b>227</b>	<b>Set up Single Sign-On by Yourself</b>	246	<a href="#">Add New RingCentral Rooms</a>
<b>228</b>	<b>Contact Support to Enable SSO</b>	246	For Google
<b>229</b>	<b>Directory Integration</b>	246	For Exchange/Office 365
229	<a href="#">Active Directory</a>	246	For all Rooms
<b>230</b>	<b>HIPAA Conduit Setting*</b>	247	<a href="#">View Rooms in Your Account</a>
<b>231</b>	<b>Multi-Site Settings</b>	247	View existing conference rooms
<b>232</b>	<b>Create a New Site</b>	248	Manage RingCentral Rooms General Settings
<b>234</b>	<b>Manage a Dial-Plan Across Sites</b>	249	Manage RingCentral Rooms Display Settings
<b>235</b>	<b>Move Assets Across Sites</b>	250	<a href="#">Configure Webinar Settings</a>
235	<a href="#">Move Users across Sites</a>	251	Registration Settings
236	<a href="#">Move IVR Menus across Sites</a>	252	Questions and Custom Questions
237	<a href="#">Move Call Queues across Sites</a>	<b>253</b>	<b>View Meetings Reports</b>
<b>238</b>	<b>Audit Trail</b>	<b>254</b>	<b>Meetings Settings</b>
239	<a href="#">Audit Trail</a>	255	<a href="#">Configure Meetings Settings</a>
239	Access Audit Trail	<b>259</b>	<b>Appendix A: Express Setup for Admins</b>
241	Search Capability	<b>260</b>	<b>Welcome to RingCentral</b>
241	Search by Change	260	<a href="#">Activate Your Account</a>
241	Search by Items Affected	261	<a href="#">Your Account Security</a>
<b>243</b>	<b>RingCentral Meetings</b>	262	Create Your Password
		263	Set Your PIN
		264	Set Your Security Question and Answer

- 265 **Your Company Account is now ready for setup**
- 266 **Setting up Users**
  - 267 Set up User Profiles
  - 268 Company Greeting
  - 269 Set the Operator Extension
  - 270 Verify My Info Profile
  - 271 Check or Reset your Regional Settings
  - 272 Emergency Calling - Registered Location
  - 273 My Info > Call Forwarding
  - 275 Call Handling - Simultaneously or Sequentially
  - 276 My Info > Voicemail
- 277 **Review Your Company Settings**
- 278 **Use RingCentral Anywhere**
- 279 **Congratulations!**
- 280 **The Admin Portal**
  - 280 To Find Information About

- 280 Knowledgebase Articles
- 281 **While You are Using RingCentral Products**
  - 281 **Attend a Training Webinar**
  - 281 **Post in the RingCentral Community**
  - 281 **Download Applications**
- 282 **Appendix B: Bulk Purchase and Upload**
  - 283 **Bulk Purchase of Users**
  - 286 **Bulk Upload of Users**
  - 287 **Activation of Users**
- 288 **Appendix C: Multi-Account Access**
- 289 **Account Management Portal**
  - 290 **Manage Linked Accounts**
  - 290 **Access Accounts**
  - 291 **View Service Status**

# Getting Started

## Introduction

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

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

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

\*An additional license fee is required.

## How to Access Your Account

If you have created but not set up your administrator account, see [“Appendix A: Express Setup for Admins” on page 259](#) to learn how to set up your account.

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

### Unified Login

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

### Email or Google as User ID

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

### Single Sign-on

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

### Account Validation

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

**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

**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**.

The screenshot shows the RingCentral Sign In page. At the top is the RingCentral logo. 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, and a 'Password' field. There is a checked 'Remember me' checkbox and a 'Sign In' button. Below the button is a 'Forgot Password?' link and an 'Or Sign In With' section with 'Email', 'Google', and 'Single Sign-on' options. An orange callout points to the 'Email' option. At the bottom is a link: 'New to RingCentral? Sign up here'.

The screenshot shows the RingCentral Sign In page with the 'Email' and 'Password' fields highlighted by orange callouts. The 'Remember me' checkbox is checked, and the 'Sign In' button is highlighted. Below the button are links for 'Forgot Password?' and 'Or Sign In With'. The 'Or Sign In With' section includes 'Phone', 'Google', and 'Single Sign-on' options. At the bottom is a link: '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 dropdown arrow, and a 'Password' field. A 'Remember me' checkbox is checked. A dark blue 'Sign In' button is prominent. Below the button are links for 'Forgot Password?' and 'In With'. At the bottom, there are three buttons: 'Email', 'Google' (with the Google logo), and 'Single Sign-on'. 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 the instruction 'Sign in with your Google Account'. A large grey circle with a person icon represents the user. A text input field labeled 'Enter your email' is highlighted with an orange callout. Below it is a blue 'Next' button, also highlighted with an orange callout. A link for 'Find my account' is positioned below the 'Next' button. At the bottom, there is a 'Create account' link and a row of icons for various Google services (Gmail, YouTube, etc.).

This Google Sign In screen shows a user profile for 'dave.richards@gmail.com' with a blue circular profile picture. Below the profile is a 'Password' field with an orange callout pointing to it. A blue 'Sign in' button is highlighted with an orange callout. Below the button are checkboxes for 'Stay signed in' (checked) and a link for 'Forgot password?'. A 'Create account' link is at the bottom. The footer includes the text 'One Google Account for everything Google' and a row of service icons.

The Google permissions screen shows the RingCentral logo and the text 'RingCentral would like to:'. Below this are two permission items: 'Know who you are on Google' and 'View your email address', each with an information icon. At the bottom, there is a line of small text: 'By clicking Allow, you allow this app and Google to use your information in accordance with their respective terms of service. You can change this and other Account Permissions at any time.' Below this text are 'Deny' and 'Allow' buttons. An orange callout points to the 'Allow' button.

## Admin Homepage

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

### Main Functions

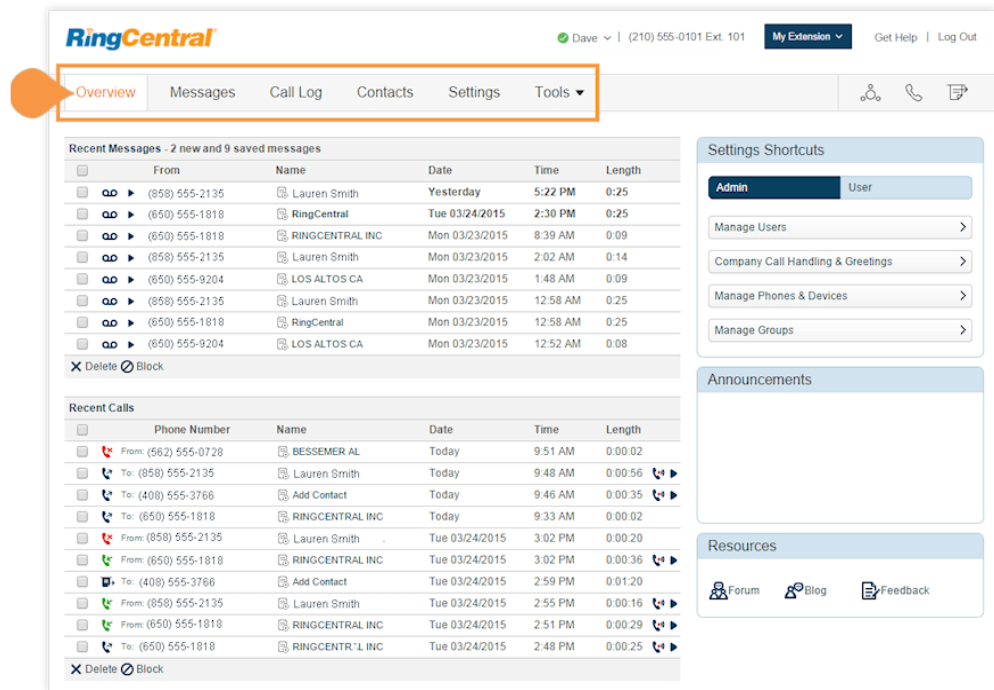
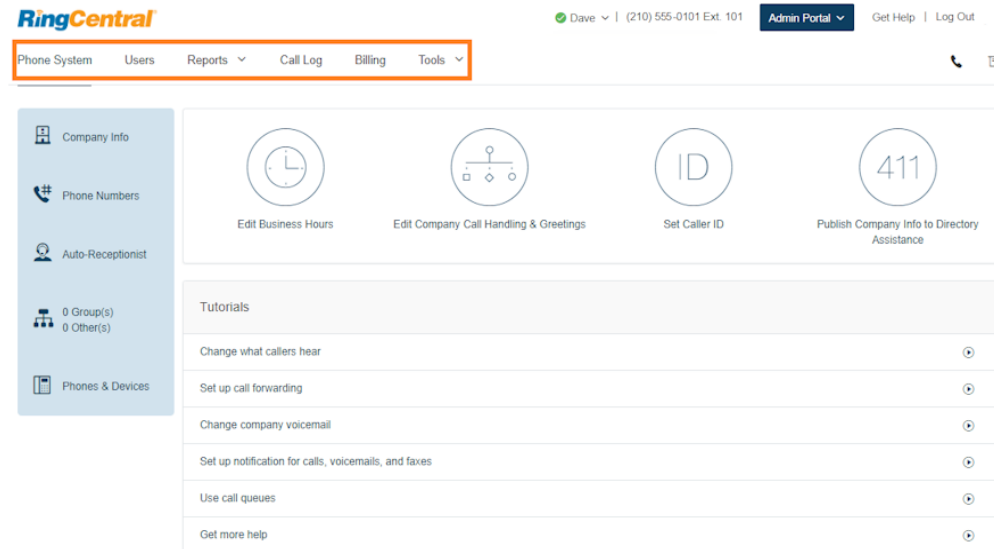
There are a few main functions that administrators can access from any online page. These functions are **Do Not Disturb**, **Conference**, **RingOut**, and **FaxOut**.

### Admin Portal

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

### My Extension

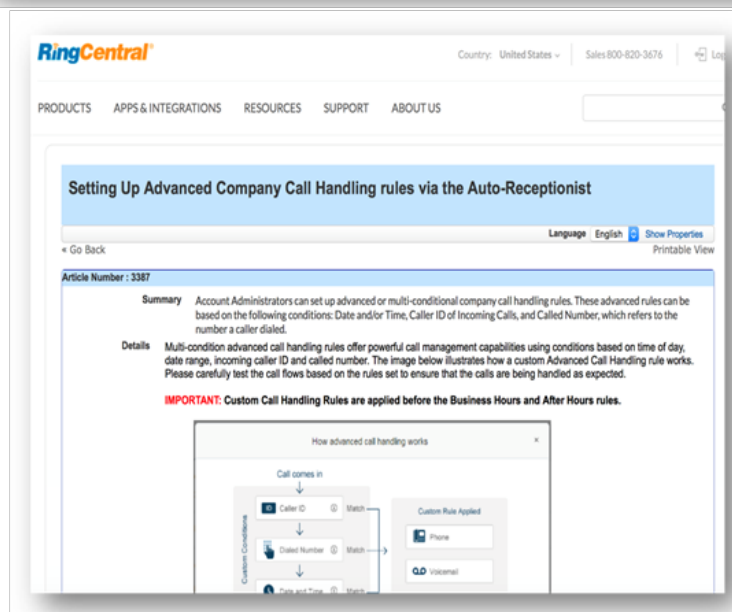
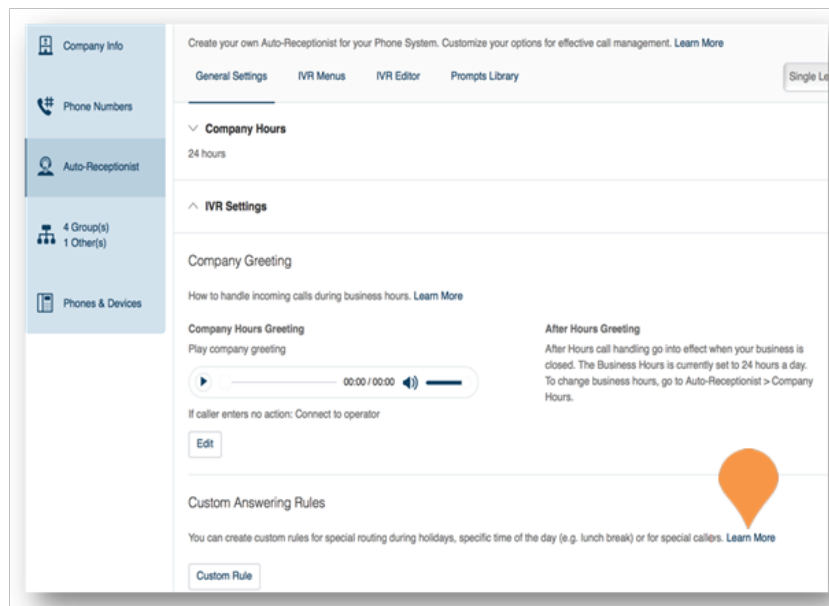
When you switch to the **My Extension** page, you see the standard user settings view of Overview, Messages, Call Log, Contacts, Settings, and Tools. Click on **Settings** to access your individual settings. The **My Extension** tab houses the same settings as a regular user has.



## Product Help

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

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



## Do Not Disturb

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

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

The screenshot shows the RingCentral Admin Portal interface. At the top right, the user's name 'Dave' and extension '(210) 555-0101 Ext. 101' are displayed next to a dropdown menu. The dropdown menu is open, showing three options: 'Take all calls', 'Do not accept call queue calls', and 'Do not accept any calls'. Below the user information, there is a navigation bar with tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The main content area is divided into two sections. The top section contains four circular icons with labels: 'Edit Business Hours', 'Edit Company Call Handling & Greetings', 'Set Caller ID', and 'Publish Company Info to Directory Assistance'. The bottom section is titled 'Tutorials' and contains a list of links with right-pointing arrows: 'Change what callers hear', 'Set up call forwarding', 'Change company voicemail', 'Set up notification for calls, voicemails, and faxes', 'Use departments', and 'Get more help'. On the left side, there is a sidebar menu with icons and labels for 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '4 Group(s) 2 Other(s)', and 'Phones & Devices'.

## 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**.

The image shows three screenshots of the RingCentral conferencing application interface, illustrating the steps to launch and configure a conference.

**Top Screenshot:** A user profile bar for 'Dave | (650) 555-0012 Ext.' with 'Get Help | Log Out' links. A call icon is highlighted with a red circle and the number '1'.

**Middle Screenshot:** The 'Conference' settings pop-up. It includes sections for 'Dial-in Numbers', 'Host', 'Participants', 'International Dial-in Numbers', and 'Conference Commands'. A red circle with '2' points to the 'Dial-in Numbers' section. A red circle with '2a.' points to the 'Location' dropdown. A red circle with '2b.' points to the 'Host' and 'Participants' fields. A red circle with '2c.' points to the 'International Dial-in Numbers' section. A red circle with '2d.' points to the 'Enable join before host' checkbox. A red circle with '2e.' points to the 'Invite with Email' button.

**Bottom Screenshot:** The 'Select International Dial-In Numbers' pop-up. It features a search bar, a list of countries with their respective dial-in numbers, and a 'Done' button highlighted with a red circle and the number '3'.

Location	Dial-In Number
Los Angeles, CA	(213) 291-9058
Philadelphia, PA	(267) 930-4000
Argentina	+54 (11) 59842371
Australia	+61 (2) 83104136
Austria	+43 (1) 2675024
Bahrain	+973 16198814
Belgium	+32 (2) 8089351
Benin	+229 61509862
Brazil	+55 (61) 35500673
Bulgaria	+359 (2) 4917819
Canada	+1 (438) 6000531
Canada	+1 (431) 8001649

## Conference Commands

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

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

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

### Preventing Music-On-Hold

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

Conference Commands <span style="float: right;">×</span>	
Use your touch-tone dialpad keys to mute or block participants, record the call, and more.	
Command	Action
* # 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> Press 1x: Mute callers - Callers can unmute with * # 6 Press 2x: Mute callers - Listen only. No unmuting option Press 3x: Unmute callers - Opens the line again
* # 6	<b>Mute Host Line</b> Press once to MUTE Press again to UNMUTE
* # 7	<b>Secure the Call</b> Press once to BLOCK all callers Press again to OPEN the call
* # 8	<b>Hear sound when people Enter or Exit call</b> Press 1x: Turns OFF sound Press 2x: Enter tone is ON Exit tone is OFF Press 3x: Enter tone is OFF Exit tone is ON Press 4x: Turns ON sound
* 9	<b>Record your conference</b> Press once to START recording Press again to STOP recording
<b>Done</b>	

## 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.

The screenshots show the following steps:

1. The RingOut icon in the top right of the user interface.
2. The RingOut pop-up dialer appearing.
3. The user entering a number into the 'To' field.
4. The user selecting a 'From' number from a drop-down menu.
5. The 'Call' button turning green.
6. The 'Prompt me to press 1 before connecting the call' checkbox being checked.
7. The 'Call' button being clicked.

3a. A 'Recent Calls' list showing two outgoing calls:

Type	Phone Number	Date/Time	Length
☎	To:	Today 1:50 PM	00:00:00
☎	To:	Today 1:49 PM	00:00:00

Buttons: Call Logs, Cancel, Insert



## FaxOut

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

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

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

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

The image shows two overlapping windows from the RingCentral interface. The top window is titled 'Send a Fax' and contains the following elements:

- To:** A text input field with a plus icon on the right. A callout '2' points to this field.
- Cover Page:** A checkbox labeled 'Enable' with a callout '3' pointing to it.
- Attach Files:** A dropdown menu currently showing 'Google Drive' with a callout '4' pointing to it. Below it is a 'Browse' button.
- Schedule:** A checkbox labeled 'Enable' with a callout '5' pointing to it. Below it is a 'Send on' field with a calendar icon and a callout '6' pointing to the 'Schedule' button at the bottom right.

The bottom window is titled 'Select Contacts' and contains the following elements:

- Search Contact:** A search input field with a callout '2a.' pointing to it.
- Table of Contacts:** A table with columns for 'First Name', 'Last Name', and 'Fax'. Two rows are selected, indicated by checkboxes in the left margin. A callout '2b.' points to the 'Insert' button at the bottom right.

# 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 displays the RingCentral Admin Portal interface for the Phone System. At the top, the RingCentral logo is on the left, and the user's name 'Dave' with a dropdown arrow, phone number '(210) 555-0120 Ext. 101', and 'Admin Portal' dropdown are on the right. Below the header is a navigation bar with 'Phone System' selected, followed by 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The main content area is divided into two columns. The left column is a sidebar with icons and labels for 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '0 Group(s) / 0 Other(s)', and 'Phones & Devices'. The right column contains four large circular shortcut cards: 'Edit Business Hours' (clock icon), 'Edit Company Call Handling & Greetings' (organization chart icon), 'Set Caller ID' (ID icon), and 'Publish Company Info to Directory Assistance' (411 icon). Below these is a 'Tutorials' section with a list of links, each with a right-pointing arrow: 'Change what callers hear', 'Set up call forwarding', 'Change company voicemail', 'Set up notification for calls, voicemails, and faxes', 'Use departments', and 'Get more help'.

## 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 shows the 'Company Info' page in the RingCentral Admin Portal. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar has 'Company Info' selected. The main content area has tabs for 'Company Address', 'Caller ID Name', and 'Directory Assistance'. The 'Company Address' tab is active, showing a form with the following fields:

- Company Name: My Company
- City: San Mateo
- Company Address: 123 Main Street
- State/Province: Select
- Zip Code: 94404

A 'Save' button is located at the bottom right of the form.

The screenshot shows the 'Company Info' page in the RingCentral Admin Portal for a multi-site account. The left sidebar has 'Company Info' selected. The main content area has a search bar 'Search sites...' and a '+ New Site' button. Below is a table of 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 configuration panel for the selected site, with tabs for 'General Info', 'Address', 'Caller ID Name', and 'Directory Assistance'. The 'Caller ID Name' tab is active, showing the following text:

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.

BELMONT OFFICE

## 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 RingCentral logo is on the left, and user information (Dave | (210) 555-0120 Ext. 101) and the Admin Portal button are on the right. A navigation menu below the logo includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is selected and highlighted with a red circle '1'. In the left sidebar, 'Company Info' is selected with a red circle '2'. The main content area has three tabs: 'Company Address' (selected with a red circle '3'), 'Caller ID Name', and 'Directory Assistance'. Below the 'Company Address' tab, there is a message: 'Company Address information will be used for publishing to Directory Listing if this service is available for your account.' Below this message are five input fields: 'Company Name' (with a red circle '4'), 'City', 'Company Address', 'State/Province', and 'Zip Code'. The 'Save' button is located at the bottom right of the form area, also highlighted with a red circle '5'.

## 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. The top navigation bar includes the RingCentral logo, user information (Dave | (210) 555-0120 Ext. 101), and links for Admin Portal, Get Help, and Log Out. Below the navigation bar, there are tabs for Phone System, Users, Reports, Call Log, Billing, and Tools. The main content area is divided into a left sidebar and a main panel. The sidebar contains icons for Company Info, Phone Numbers, Auto-Receptionist, Group(s) and Other(s), and Phones & Devices. The main panel has three tabs: Company Address, Caller ID Name, and Directory Assistance. The Caller ID Name tab is active, showing a text input field with the value "My Company". A "Save" button is located at the bottom right of the main panel. Five numbered callouts (1-5) are overlaid on the screenshot to guide the user through the steps: 1. Clicking the Phone System tab, 2. Clicking the Company Info icon in the sidebar, 3. Clicking the Caller ID Name tab, 4. Entering the company name in the text field, and 5. Clicking the Save button.

## 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.

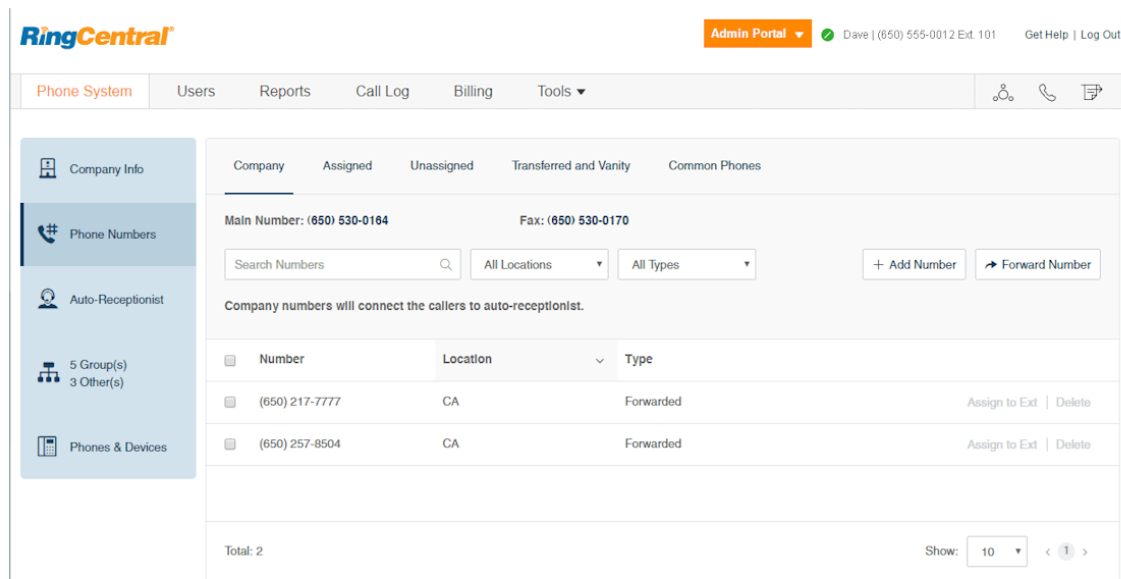
The screenshot displays the RingCentral Admin Portal interface. At the top right, the user is logged in as 'Dave | (650) 555-0012 Ext. 101'. The navigation menu includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Company Info' section is selected in the left sidebar. The 'Directory Assistance' sub-tab is chosen, showing a form to enter business information. The form includes fields for Main Number, Fax (optional), Company Name, City, Company Address, State/Province, Email, and Zip Code. A 'Next' button is visible at the bottom right of the form. A modal window titled 'Review Listing Details' is open, showing a summary of the entered information and a checkbox for 'I agree to the terms of service'. A 'Publish' button is located 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 for the Phone Numbers section. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The user is logged in as 'Dave | (650) 555-0012 Ext. 101' with options for 'Get Help' and 'Log Out'. The left sidebar contains navigation options: 'Company Info', 'Phone Numbers' (selected), 'Auto-Receptionist', '5 Group(s) 3 Other(s)', and 'Phones & Devices'. The main content area displays the 'Company' tab for phone numbers. It shows 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'. A note states: 'Company numbers will connect the callers to auto-receptionist.' A table lists the numbers:

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

At the bottom, it shows 'Total: 2' and a 'Show: 10' dropdown with navigation arrows.



## Add Company Numbers

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

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

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

The screenshot illustrates the RingCentral Admin Portal interface for adding company numbers. The main content area shows the 'Company' tab selected, displaying the main number (650) 530-0164 and fax number (650) 530-0170. A table lists existing numbers with their locations and types. A modal window shows the 'Add Number' process, including selecting a number type (Local, Toll-Free, Vanity), state/area code, and assigning the number to an Auto-Receptionist or Selected Extension. The final step shows a review of charges.

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

**Add Number** Modal Steps:

- Select Numbers
- Assign to Ext.
- Select Number Plan
- Order Confirmation

**Add Number** Modal Step 2: Assign to Ext.

Assign selected number to:

- Auto-Receptionist
- Selected Extension

**Add Number** Modal Step 4: Order Confirmation

Review and Confirm Charges:

Up to 1 additional numbers Per month \$5.00\*

\* Does not include taxes and fees

## 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 displays the RingCentral Admin Portal interface. At the top, the 'Phone System' tab is selected, indicated by a red circle '1'. The 'Phone Numbers' section is active, with the 'Assigned' tab selected, indicated by a red circle '3'. The 'Add Number' button is highlighted with a red circle '4'. Below the main content area, three modal windows show the 'Add Number' process:

1. **Select Numbers**: The user selects the number type (Local (Domestic), Toll-Free, or Vanity), the state/province (California), and the area code. The 'Add Numbers' button is visible.
2. **Assign to Ext.**: The user assigns the selected number to an Auto-Receptionist or a Selected Extension. The 'Next' button is visible.
3. **Order Confirmation**: The user reviews the charges for the number. The charges are listed as 'Up to 1 additional numbers' and 'Per month: \$5.00'. The 'Done' button is visible.

## 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 path from the Admin Portal to the Phone System, then to Phone Numbers, and finally to the Assigned tab where the Forward Number option is selected. The 'Forward My Calls to RingCentral' modal is shown in two stages: first, entering the existing phone number and selecting the destination (Auto-Receptionist), and second, reviewing the configuration details and instructions for ordering call handling services from the telephone company. The final step is clicking the 'Done' button to complete the process.

## 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.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, user information 'John | (650) 530-0164 Ext. 101', and links for 'Get Help' and 'Log Out'. Below this is a secondary navigation bar with tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. A left sidebar contains a menu with 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) 3 Other(s)', and 'Phones & Devices'. The main content area is titled 'Unassigned' and features a search bar, filters for 'All Locations' and 'All Types', and a table of phone numbers. The table has columns for 'Number', 'Location', and 'Type'. The data rows are as follows:

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

At the bottom of the table, it shows 'Total: 21' and a 'Show: 10' dropdown menu. There are also pagination controls showing '< 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 or Toll Free Number, and complete the process.
5. To forward calls from your number to Office@Hand, select **Forward my calls to AT&T Office@Hand**. Enter your existing phone number. Select whether to forward the calls to the company auto-receptionist or an extension.

The screenshot shows 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', '20 Groups & Others', and 'Phones & Devices'. The main content area has tabs for 'Company', 'Assigned', 'Unassigned', 'Transferred and Vanity', and 'Common Phones'. A search bar and a '# Transfer Numbers' button are visible. Below 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

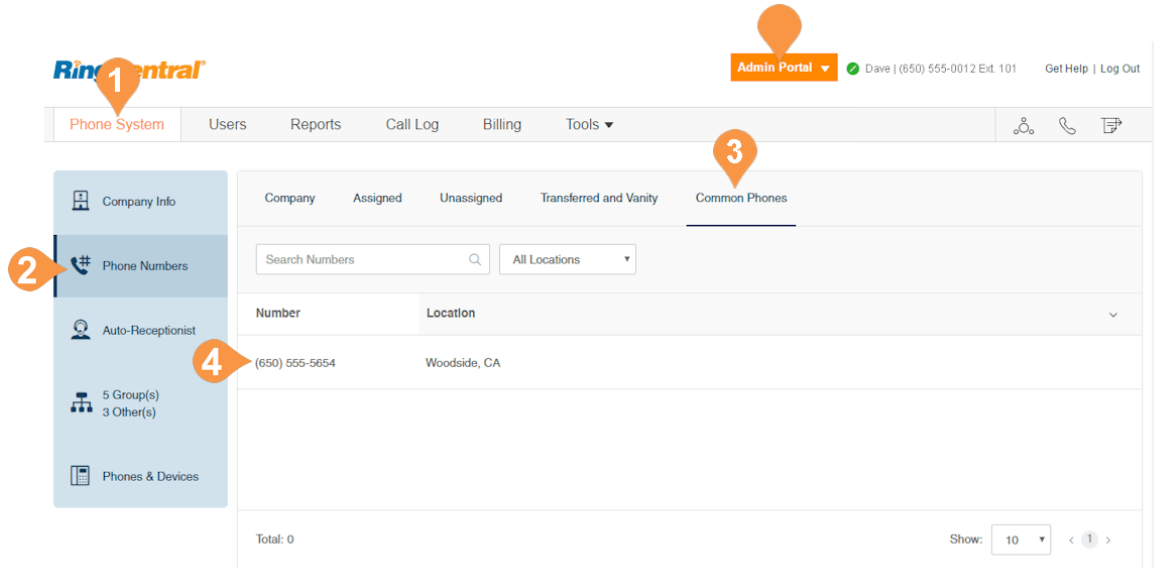
A telephone shared between users is called a common phone. **Hot Desking** allows users to share a common phone. With **Hot Desking** you can log in to a shared RingCentral desk phone remotely—and use it like your own—with access to your personal extension, saved settings, voicemail, and more.

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 143.



The screenshot shows 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', '5 Group(s) 3 Other(s)', and 'Phones & Devices'. The main content area is titled 'Common Phones' and features a search bar, a 'Location' dropdown menu, and a table with the following data:

Number	Location
(650) 555-5654	Woodside, CA

The bottom of the table shows 'Total: 0' and a 'Show: 10' dropdown menu.

# Auto-Receptionist

## Auto-Receptionist Settings

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

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

### Manage Auto-Receptionist with Multi-Site Support

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

The screenshot displays the RingCentral Admin Portal interface for configuring an auto-receptionist. The top navigation bar includes 'Admin Portal', user information 'Dave | (650) 555-0012 Ext. 101', and links for 'Get Help' and 'Log Out'. The main menu contains 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar lists 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) 2 Other(s)', and 'Phones & Devices'. The main content area is divided into two sections: 'Single Level' and 'Multi-level'.

**Single Level Settings:**

- General Settings:** IVR Menu, IVR Editor, Prompts Library
- Company Hours:** 24 hours
- IVR Settings:** Operator Ext.: John Smith, 101
- Dial-by-Name Directory:** On
- Call Recording:** On-demand: On, Automatic: Off
- Regional Settings:** Time Zone: Pacific Time (US & Canada)

**Multi-level Settings:**

Create your own Auto-Receptionist for your Phone System. Customize your options for effective call management. [Learn More](#)

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

Search sites... [Search Icon]

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

**Belmont Office** [Close Icon]

- Site Hours:** 24 hours
- IVR Settings:** Site Fax/SMS Recipient: Charlton Ho, Ext. 101
- Regional Settings:** Time Zone: (GMT-08:00) Pacific Time (US & Canada)



## Company Business Hours

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

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is highlighted with a callout '1'. The 'Phone System' tab is selected, and the 'Auto-Receptionist' section is expanded, with 'Company Hours' selected, indicated by callout '2'. The 'Company Hours' settings page is shown, with the '24 hours / 7 days a week' radio button selected, indicated by callout '3'. The 'Save' button is highlighted with callout '5'. Other sections visible include 'IVR Settings', 'Dial-by-Name Directory', 'Call Recording', and 'Regional Settings'.

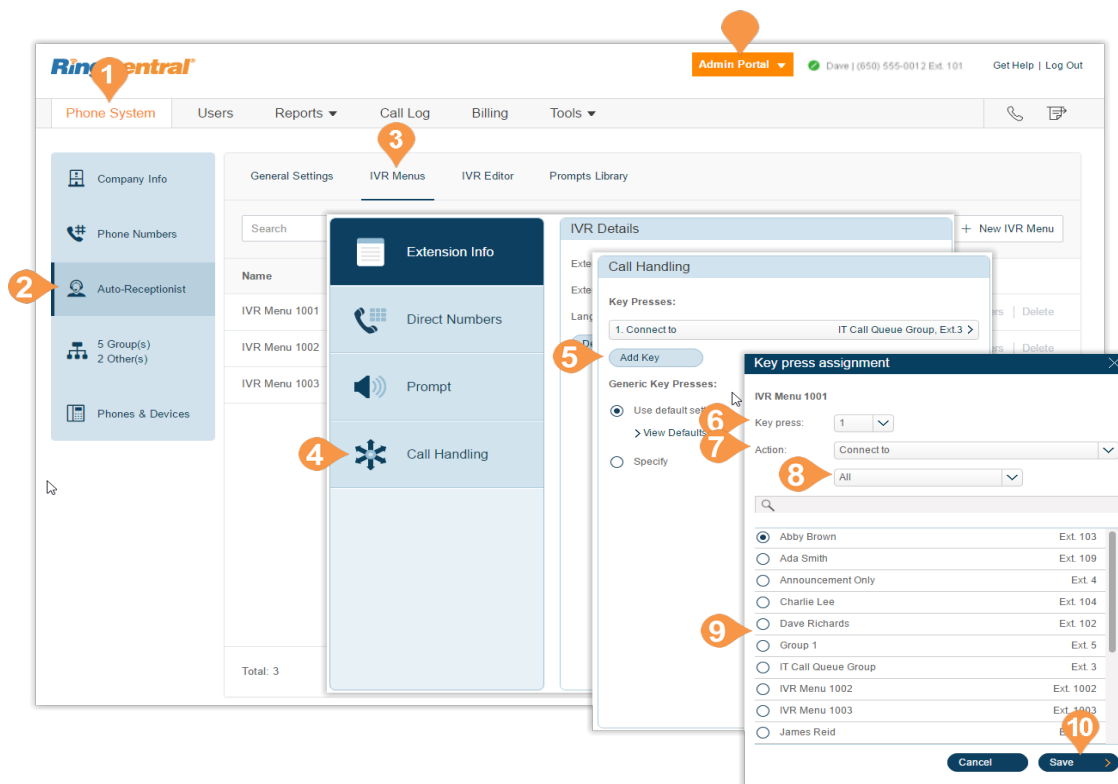
## Company Call Handling

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

Set Call Handling:

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

You can also use the Visual IVR Editor to configure call handling settings. Learn more about the [“Visual IVR Editor” on page 59](#).



## Company Greeting and Menu

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

### Set a Company Greeting

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

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', user information, and 'Get Help | Log Out'. The main navigation tabs are 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) 2 Other(s)', and 'Phones & Devices'. The main content area is divided into 'General Settings', 'IVR Menus', 'IVR Editor', and 'Prompts Library'. The 'IVR Settings' section is active, showing 'Company Hours' (24 hours) and 'Company Greeting' options. A 'Company Hours Greeting' pop-up window is open, displaying settings for 'Incoming Calls During Company Hours will' (radio buttons for 'Play company greeting' and 'Bypass greeting to go to extension'), 'Set Greeting' (a dropdown menu set to 'Custom'), and 'If Caller Enters no Action' (radio buttons for 'Connect to operator' and 'Disconnect'). The pop-up also features a recording interface with a play button, a progress bar, and a 'Done' button. Numbered callouts (1-8) are placed over the interface to correspond with the steps in the text.

## 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**.

The screenshot displays the RingCentral Admin Portal interface for configuring the Dial-by-Name Directory. The interface includes a navigation menu on the left with the following items: Company Info, Phone Numbers, Auto-Receptionist (selected), 5 Group(s) / 2 Other(s), and Phones & Devices. The main content area shows the following settings:

- General Settings**: IVR Menus, IVR Editor, Prompts Library, Single Level (dropdown)
- Company Hours**: 24 hours
- IVR Settings**: Operator Ext.: John Smith, 101
- Dial-by-Name Directory**:
  - Enable Dial-by-Name Directory**:
  - Extensions in Directory**: By default, all extensions are included in the dial-by-name directory. You can exclude certain extensions that you do not want to be searchable.
  - Searchable Extensions**: 16
  - Directory Extension**: 19
  - Edit** button
  - Search Criteria**: Search by  First name  Last name

The **Save** button is highlighted with a callout.

## 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.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information: 'John | (866) 774-8122 Ext. 101'. Below the navigation bar are tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar contains a menu with 'Company Info', 'Phone Numbers', 'Auto-Receptionist' (highlighted with callout 2), '5 Group(s) 2 Other(s)', and 'Phones & Devices'. The main content area is titled 'General Settings' and includes sub-sections for 'Company Hours', 'IVR Settings' (highlighted with callout 3), 'Company Greeting', 'Company Hours Greeting', 'Custom Answer', and 'General IVR Settings'. A 'Select Extension' button (callout 4) is visible under 'General IVR Settings'. A pop-up window titled 'Operator Extension (0)' is open, showing a search bar, a dropdown for 'All Departments', and a table of extensions. The table has columns for 'Select', 'Name', 'Ext.', 'Type', and 'Department'. The 'Group 1' row is selected (callout 5). The pop-up also shows 'Total: 15' and 'Show: 10' with pagination controls. 'Cancel' and 'Done' buttons are at the bottom of the pop-up (callout 6). Below the pop-up, the 'Operator Extension (0)' is set to 'John Smith, Ext. 101'. A 'Select Extension' button (callout 4) is visible below this. 'Cancel' and 'Save' buttons are at the bottom right of the main content area (callout 7).

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 checked="" 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	

## Zero Dialing

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

To set zero dialing,

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

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

## Removing a Destination Extension

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

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' header shows the user 'John | (866) 774-8122 Ext. 101' and options for 'Get Help | 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', '5 Group(s) / 2 Other(s)', and 'Phones & Devices'. The 'Auto-Receptionist' section is active, showing 'General Settings', 'IVR Menus', 'IVR Editor', and 'Prompts Library'. The 'IVR Settings' tab is selected, displaying '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 for 'Connect to Operator' and 'Connect to Extension'. 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 shows the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', user information 'Dave | (650) 555-0012 Ext. 101', and 'Get Help | Log Out'. The main navigation menu has 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar contains 'Company Info', 'Phone Numbers' (highlighted with a '2'), 'Auto-Receptionist', '0 Group(s) 0 Other(s)', and 'Phones & Device' (highlighted with a '3'). The main content area shows a list of phone numbers with columns for 'Number', 'Name', 'Location', and 'Type'. The number '(650) 555-0012' is selected, and the 'Direct Number: (650) 555-0012' window is open. This window has a 'Name' field containing 'Hayward Branch' (highlighted with a '4'). Below the name field is a 'Number Type' dropdown set to 'Voice and Fax'. Underneath, it says 'Calls to this number will be connected to:' with radio buttons for 'Auto-Receptionist' (selected) and 'Extension'. At the bottom, there are 'Delete Number', 'Cancel', and 'Save' buttons (the 'Save' button is highlighted with a '5').



## 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.

The screenshot displays the RingCentral Admin Portal interface for configuring call recording. The left sidebar shows the navigation menu with 'Auto-Receptionist' selected. The main content area is titled 'Call Recording' and includes a toggle for 'On-demand Call Recording' which is currently turned on. Below this, there are two sections for 'Announcement on Start' and 'Announcement on Stop', each with an 'Edit' button. Two modal windows are open, showing the configuration options for these announcements. The 'Announcement on Start' modal allows selecting a greeting (Default or Custom) and a view language (English (U.S.)). The 'Announcement on Stop' modal also allows selecting a greeting and a view language. Both modals include a play button and a volume slider. The 'Call Recording' section also includes a section for 'Automatic Call Recording' with a toggle and a disclaimer about legal requirements.

## 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**.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown menu, and user information: 'Dave | (650) 555-0012 Ext. 101 | Get Help | Log Out'. Below the navigation bar, there are tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar contains a menu with 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) / 2 Other(s)', and 'Phones & Devices'. The main content area is titled 'General Settings' and includes sections for 'Company Hours', 'IVR Settings', 'Dial-by-Name Directory', and 'Call Recording'. The 'Call Recording' section is expanded, showing 'On-demand Call Recording' with a toggle switch that is currently off. A mouse cursor is pointing at this toggle. Below it is the 'Automatic Call Recording' section, also with a toggle switch that is off. At the bottom right of the settings area, there are 'Cancel' and 'Save' buttons. Five orange callout circles with numbers 1 through 5 are overlaid on the image to guide the user through the steps: 1 points to the Admin Portal dropdown, 2 points to the Auto-Receptionist menu item, 3 points to the Call Recording section header, 4 points to the On-demand Call Recording toggle, and 5 points to the Save button.

## Automatic Call Recording\*

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

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

### Choose an Automatic Call Recording Announcement

First enable automatic call recording. See page 48.

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

You can also listen to your recording announcement or specify extensions to record.

5. Click **Edit** to select the call recording announcement. The Call Recording Announcement pop-up appears.
  - Select **Default** to use the provided greeting.
  - Select **Custom** to record a greeting.
6. Click **Done**.
7. Click **Save**.

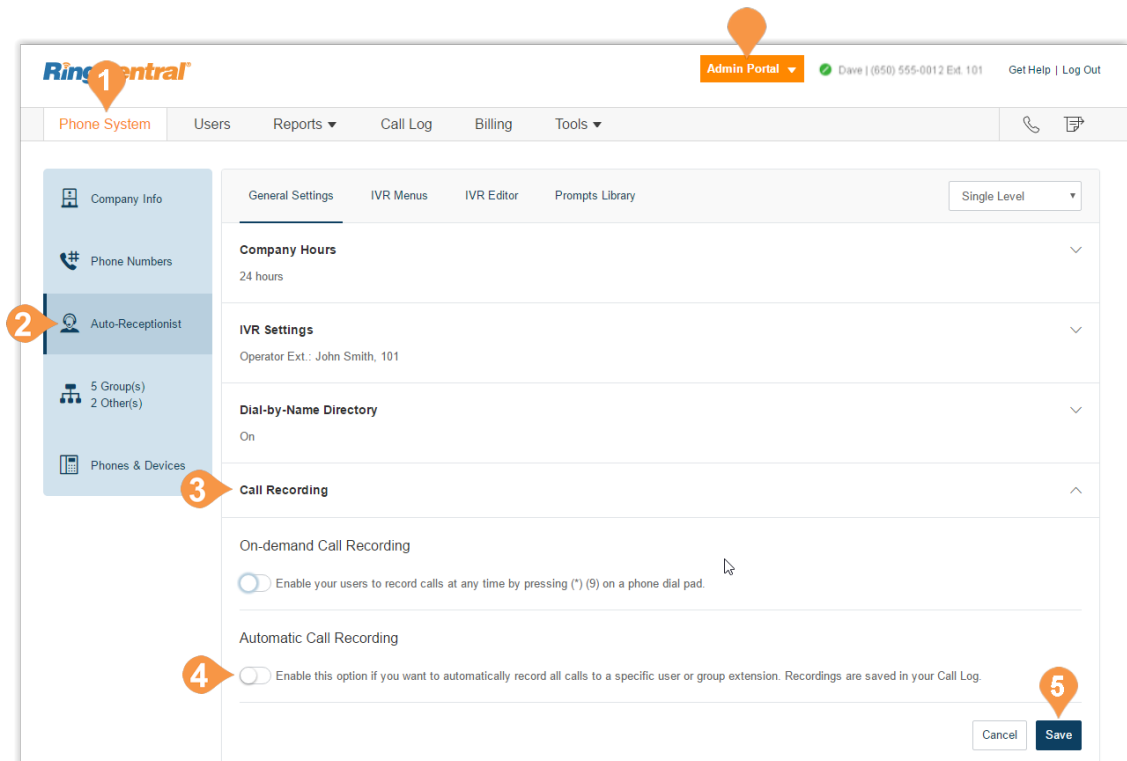
The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' tab is active, and the user is logged in as 'Daw | (850) 555-0012 Ext. 101'. The navigation menu on the left includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Auto-Receptionist' section is selected, showing '5 Group(s)' and '2 Other(s)'. The 'Call Recording' settings are visible, including 'On-demand Call Recording' (disabled) and 'Automatic Call Recording' (enabled). A 'Call Recording Announcement' pop-up window is open, showing options for 'Set Greeting' (Custom), 'Recording by' (Phone), and 'Call me at' (Enter a new number). The 'Done' button is highlighted with a red circle and the number 6. The 'Save' button at the bottom right is highlighted with a red circle and the number 7.

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

## 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**.



The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown menu, and user information for 'Dave | (850) 555-0012 Ext. 101'. Below this is a secondary navigation bar with tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar contains a list of settings categories: 'Company Info', 'Phone Numbers', 'Auto-Receptionist' (highlighted with a blue bar and a callout '2'), '5 Group(s) / 2 Other(s)', and 'Phones & Devices'. The main content area is titled 'Auto-Receptionist' and features a 'Single Level' dropdown. It contains several sections: 'Company Hours' (24 hours), 'IVR Settings' (Operator Ext.: John Smith, 101), 'Dial-by-Name Directory' (On), and 'Call Recording' (expanded with a callout '3'). The 'Call Recording' section includes 'On-demand Call Recording' and 'Automatic Call Recording' (with a callout '4'). The 'Automatic Call Recording' toggle is currently off. At the bottom right, there are 'Cancel' and 'Save' buttons, with a callout '5' pointing to the 'Save' button.

## Planning for Interactive Voice Response (IVR)

In the RingCentral system, you can create a multi-level IVR as an additional option to the Auto-Receptionist. It extends the Auto-Receptionist menu with more powerful and efficient call handling.

### Layout Your Multi-level IVR Plan

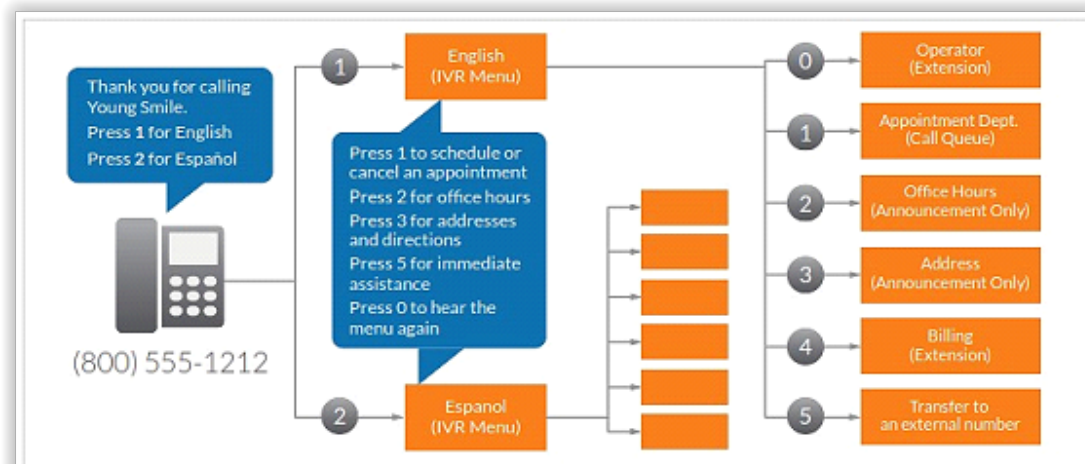
The RingCentral Multi-level IVR facility supports up to 250 menus for each account you create. It provides callers with options to self-select how they can reach a person or a department in your company. The first step in creating a multi-level IVR menu is to lay out a call-routing plan similar to the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

#### Single-Location IVR Example

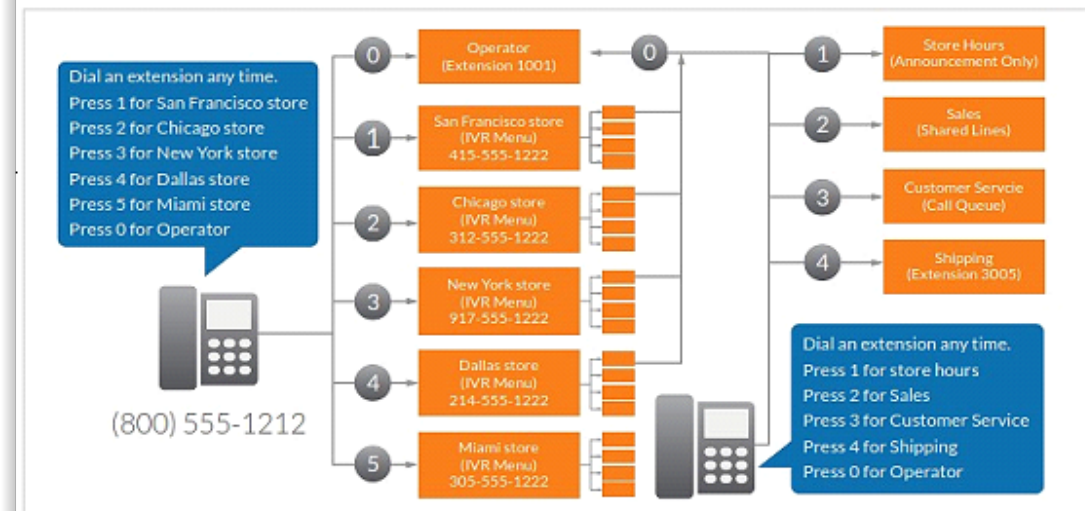
A local dentist office provides services to both English- and Spanish-speaking customers. The dental office IT Manager configures the phone routing system with identical prompts in two languages.

#### Multiple-Locations IVR Example

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



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



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

## Switch to Multi-level IVR Mode

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

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

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

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

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

The screenshot illustrates the process of switching to Multi-level IVR mode in the RingCentral Admin Portal. The interface is divided into several sections:

- Admin Portal:** Located at the top right, with a user profile for Dave | (650) 555-0012 Ext. 101 and options for Get Help and Log Out.
- Navigation:** A top bar with tabs for Phone System, Users, Reports, Call Log, Billing, and Tools.
- Left Sidebar:** Contains navigation options: Company Info, Phone Numbers, Auto-Receptionist (highlighted with a red circle 2), 5 Group(s) / 2 Other(s), and Phones & Devices.
- Main Settings Panel:**
  - General Settings:** Includes Company Hours (24 hours) and IVR Settings (Operator Ext.: John Smith, 101).
  - IVR Settings:** Includes Dial-by-Name Directory (On) and Call Recording (On-demand: Off, Automatic: Off).
  - Regional:** Includes a search field for the top level menu to connect to.
- Pop-up Windows:**
  - Warning Pop-up (4, 5):** Titled "Switch to Multi-level IVR", it contains a warning: "Warning: By switching to Multi-level IVR mode, all of your existing company call handling settings will be discarded. Please confirm that you wish to proceed." It has "Cancel" and "Continue" buttons.
  - Selection Pop-up (6, 7):** Also titled "Switch to Multi-level IVR", it prompts the user to "Select the top level menu to connect to:" and displays a table of available IVR menus.

Select	Name	Ext.
<input type="radio"/>	IVR Menu 1001	1001
<input type="radio"/>	IVR Menu 1002	1002
<input type="radio"/>	IVR Menu 1003	1003

## 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**.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar has a 'Phone System' tab selected, with sub-items: 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) / 2 Other(s)', and 'Phones & Devices'. The 'Auto-Receptionist' section is expanded, showing 'General Settings', 'IVR Menus', 'IVR Editor', and 'Prompts Library'. The 'IVR Settings' section is active, displaying 'General Settings' for 'Multi-level' IVR mode. The 'Company Hours' section shows '24 hours'. The 'IVR Settings' section includes 'Top Level IVR Menu' with options for 'Company Hours Top Menu' and 'After Hours Top Menu'. The 'Custom Answering Rules' section has a 'Custom Rule' button. The 'General IVR Settings' section specifies navigation keys: 'Press #' is set to 'Repeat menu greeting' and 'Press \*' is set to 'Return to previous menu'. Below this, there are radio buttons for 'If caller enters no action after the prompt played 3 times', with 'Disconnect the call' selected. The 'Company Fax/SMS Recipient' section has a dropdown set to 'Charlie Lee, Ext. 104'. The bottom right corner has 'Cancel' and 'Save' buttons.



## 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.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible, along with user information 'Dave | (650) 555-0012 Ext. 101' and 'Get Help | Log Out'. The navigation menu includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Auto-Receptionist' sub-tab is selected. The main content area shows the 'IVR Editor' tab, which includes sections for 'XML Editor', 'Import XML file', 'Export IVR XML File', and 'Visual IVR Editor'. A preview window at the bottom shows a visual IVR flowchart for 'Greeting' with four paths: 'A. Choose', 'A. New York', 'A. Boston', and 'A. Atlanta'.

## 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.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information (Dave | (650) 555-0012 Ext. 101 | Get Help | Log Out). The main navigation menu includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Auto-Receptionist' sub-tab is selected. The 'IVR Editor' tab is active, showing the 'XML Editor' section. The 'XML Editor' section includes a 'Download Sample IVR XML Files' section with 'Single Level IVR' and 'Multi-level IVR' buttons, and an 'Import XML file' section with 'Import' and 'Export' buttons. The 'Visual IVR Editor' section is also visible, showing a graphical interface for configuring IVR menus. A 'Launch Visual IVR Editor' button is present. The 'Visual IVR Editor' section shows a graphical interface for configuring IVR menus, with a 'Greeting' menu and a flowchart showing the menu structure.

## 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. At the top, the 'Admin Portal' dropdown is highlighted with callout 1. The 'Phone System' tab is selected in the top navigation bar. The left sidebar shows the 'Auto-Receptionist' option highlighted with callout 2. The main content area shows the 'IVR Editor' tab selected with callout 3. Below this, the 'XML Editor' section is visible, containing instructions and buttons for 'Download Sample IVR XML Files' (Single Level IVR, Multi-level IVR), 'Import XML file' (Import), and 'Export IVR XML File' (Export). The 'Export' button is highlighted with callout 4. Below the XML Editor is the 'Visual IVR Editor' section, which includes a 'Launch Visual IVR Editor' button and a preview window showing a visual flowchart for a 'Greeting' IVR menu.

## 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.

The screenshot displays the RingCentral Admin Portal interface. At the top, the RingCentral logo is on the left, and the user's name 'Dave | (850) 555-0012 Ext. 101' and 'Admin Portal' dropdown are on the right. Below the header is a navigation bar with tabs: Phone System (highlighted), Users, Reports, Call Log, Billing, and Tools. A sub-navigation bar contains: General Settings, IVR Menus, IVR Editor (highlighted), and Prompts Library. On the left is a sidebar menu with items: Company Info, Phone Numbers, Auto-Receptionist (highlighted), 5 Group(s) / 2 Other(s), and Phones & Devices. The main content area is titled 'XML Editor' and includes instructions: 'You can create your IVR menus in XML. To get started you can download sample IVR xml files.' Below this are two buttons: 'Single Level IVR' and 'Multi-Level IVR'. Further down is the 'Import XML file' section with an 'Import' button, and the 'Export IVR XML File' section with an 'Export' button. Below that is the 'Visual IVR Editor' section with a 'Launch Visual IVR Editor' button. At the bottom, a preview window shows a visual flowchart for a 'Greeting' menu with four paths: 1. Chicago, 2. New York, 3. Boston, and 4. Atlanta. Numbered callouts (1-4) are placed over the Admin Portal logo, Auto-Receptionist menu item, IVR Editor tab, and the Import button respectively.

## 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 displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible. The navigation menu on the left includes 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) 2 Other(s)', and 'Phones & Devices'. The 'Auto-Receptionist' section is expanded, showing the 'IVR Menus' tab selected. The main content area shows a search bar, a 'Language' dropdown, and a '+ New IVR Menu' button. Below this is a table with the following data:

Name	Numbers	Ext.	Language	
IVR Menu 1001		1001	English (U.S.)	Add Direct Numbers   Delete
IVR Menu 1002		1002	English (U.S.)	Add Direct Numbers   Delete
IVR Menu 1003		1003	English (U.S.)	Add Direct Numbers   Delete

An 'Add IVR Menu' modal window is open, showing the following fields:

- Extension Number: 1004
- Extension Name: IVR Menu 1004

Buttons for 'Cancel' and 'Save' are visible at the bottom of the modal. The bottom of the page shows 'Total: 3' and a 'Show: 25' dropdown.

## Configure an IVR Menu

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

## Configure Extension Info

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

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

The screenshot displays the RingCentral Admin Portal interface for configuring IVR Menus. The top navigation bar includes 'Admin Portal', user information, and utility links. The left sidebar shows the 'Auto-Receptionist' section selected. The main content area features tabs for 'General Settings', 'IVR Menus', 'IVR Editor', and 'Prompts Library'. The 'IVR Menus' tab is active, showing a table with columns for Name, Numbers, Ext., and Language. A table with 3 rows is visible, with the first row selected. A pop-up window titled 'Extension Info IVR Details' is open, showing fields for Extension Number, Extension Name, and Language, along with 'Delete Menu', 'Cancel', and 'Save' buttons. Numbered callouts (1-6) indicate the steps for configuration.

Name	Numbers	Ext.	Language	
IVR Menu 1001		1001	English (U.S.)	Add Direct Numbers   Delete
IVR Menu 1002				Add Direct Numbers   Delete
IVR Menu 1003				Add Direct Numbers   Delete

## 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.

The screenshot illustrates the process of adding a direct number to an IVR menu in the RingCentral Admin Portal. The interface is annotated with numbered callouts (1-8) corresponding to the steps in the text.

- 1**: The **Admin Portal** tab is selected in the top right corner.
- 2**: The **Auto-Receptionist** option is selected in the left-hand navigation menu.
- 3**: The **IVR Menus** tab is selected in the top navigation bar.
- 4**: An existing IVR menu (e.g., IVR Menu 1001) is selected in the table.
- 5**: The **Direct Numbers** option is selected in the sub-menu.
- 6**: The **Add Direct Number** button is clicked in the modal window.
- 7**: The **Add Direct Number** modal is shown, with the **Local (Domestic)** radio button selected. The **Select Number Type** section includes options for Local (Domestic), Toll-Free, Vanity, and International. Below this are fields for **Select State/Province** and **Select Area Code**.
- 8**: The **Next** button is highlighted in the modal window.

## 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.

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 has tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Auto-Receptionist' sub-tab is selected. The 'IVR Editor' sub-tab is also selected. The main content area shows the 'XML Editor' section with options to download sample XML files (Single Level IVR and Multi-level IVR) and import/export XML files. Below this is the 'Visual IVR Editor' section, which contains a 'Launch Visual IVR Editor' button. A callout box with the number '4' points to this button. A preview window shows a graphical IVR flowchart with a 'Greeting' node and four branches labeled 'Chicago', 'New York', 'Boston', and 'Atlanta'. Other callouts with numbers '1', '2', and '3' point to the 'Admin Portal', 'Auto-Receptionist', and 'IVR Editor' tabs respectively.

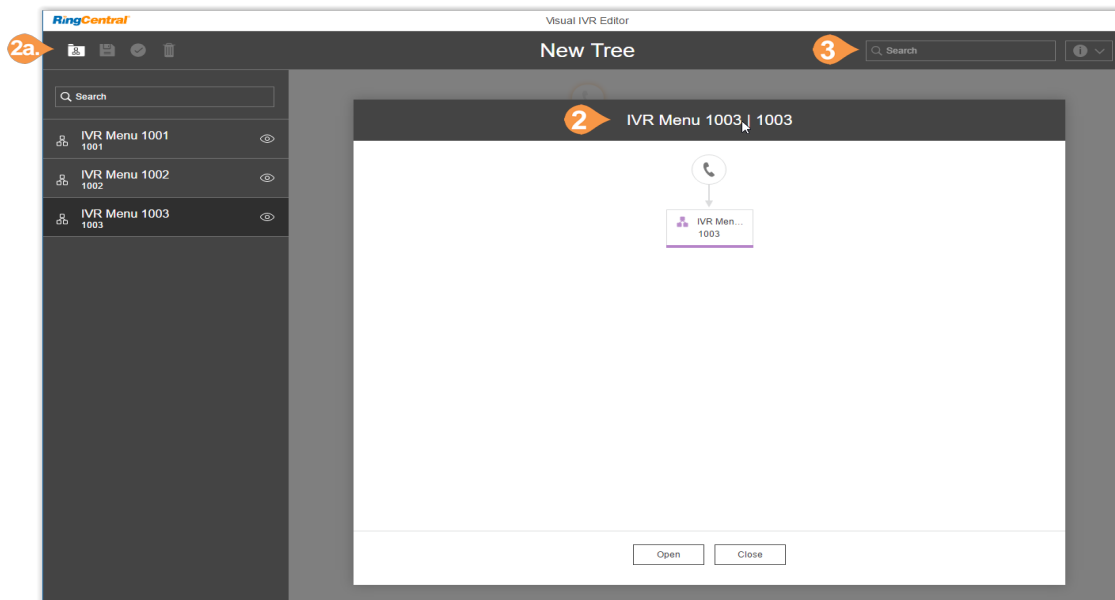


## Create a New IVR Menu or Open an Existing IVR Menu

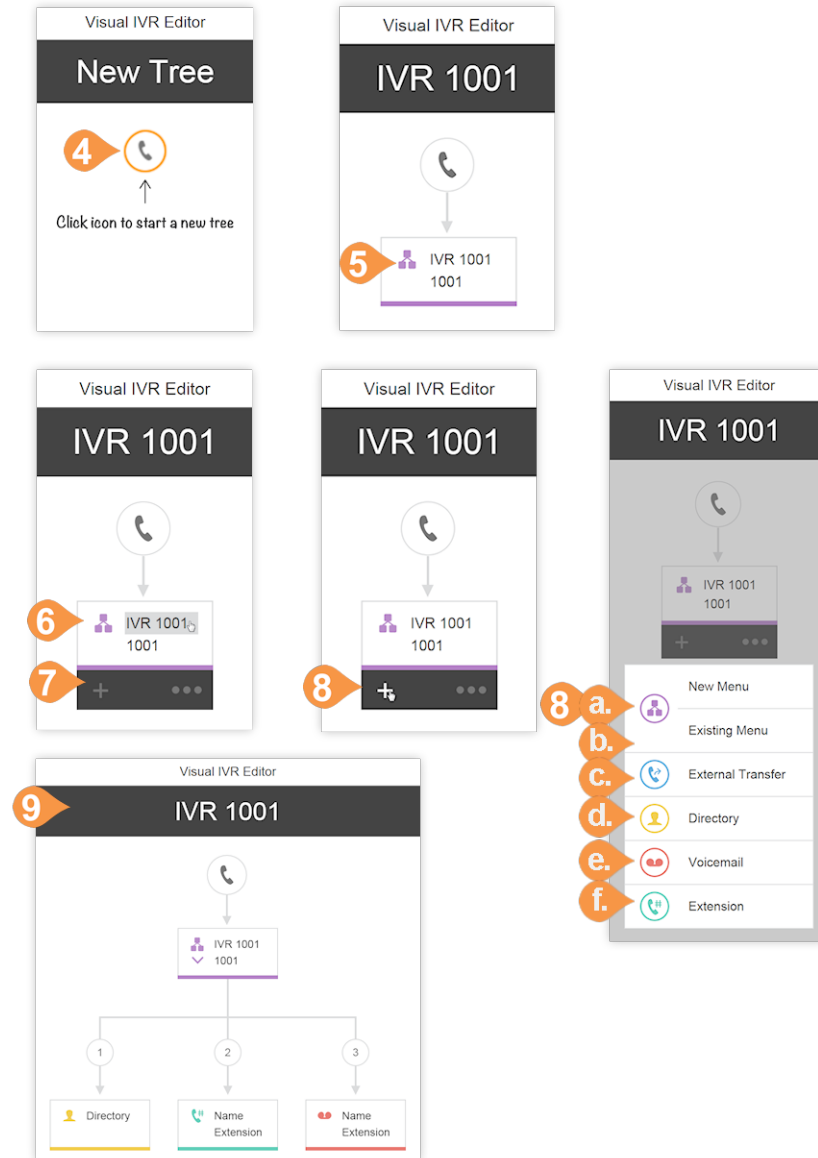
Use these steps to create a new IVR menu with the visual editor.

Open the Visual IVR Editor.

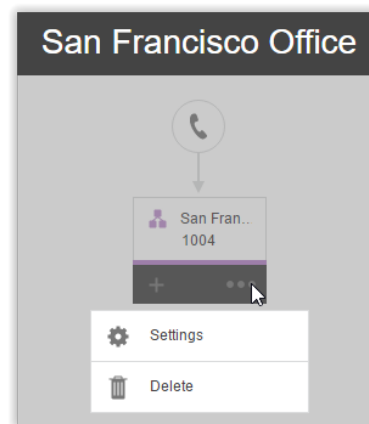
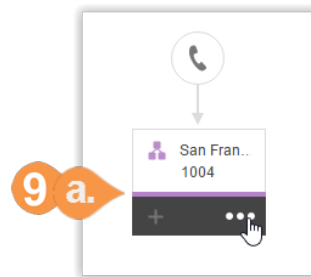
1. In the new tab, you will see your **Visual IVR Editor**. On this page, you will have a **New Tree** waiting to be created. You have the option to create a new IVR from this screen, or open an existing IVR and edit it in the Visual IVR Editor.
  - a. In the upper-left corner of the screen you have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

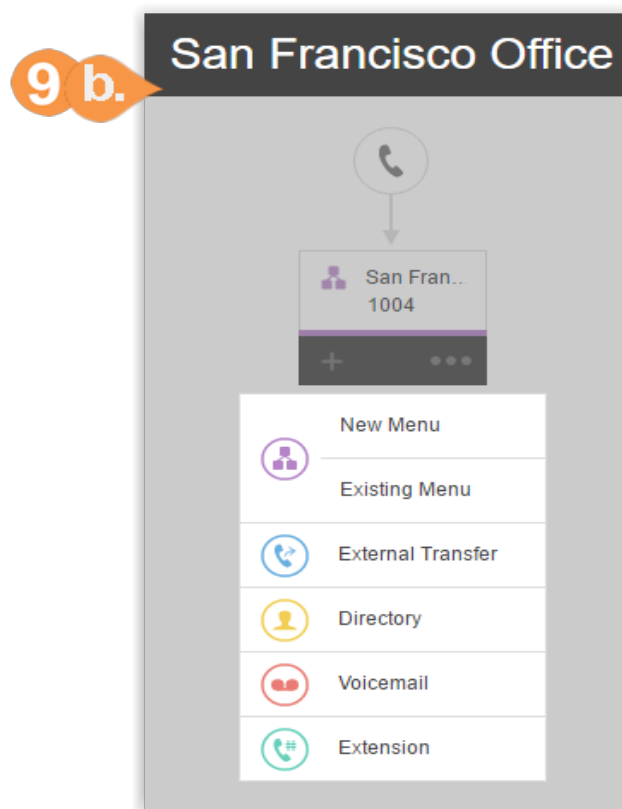
Press \*:

Return to previous menu

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

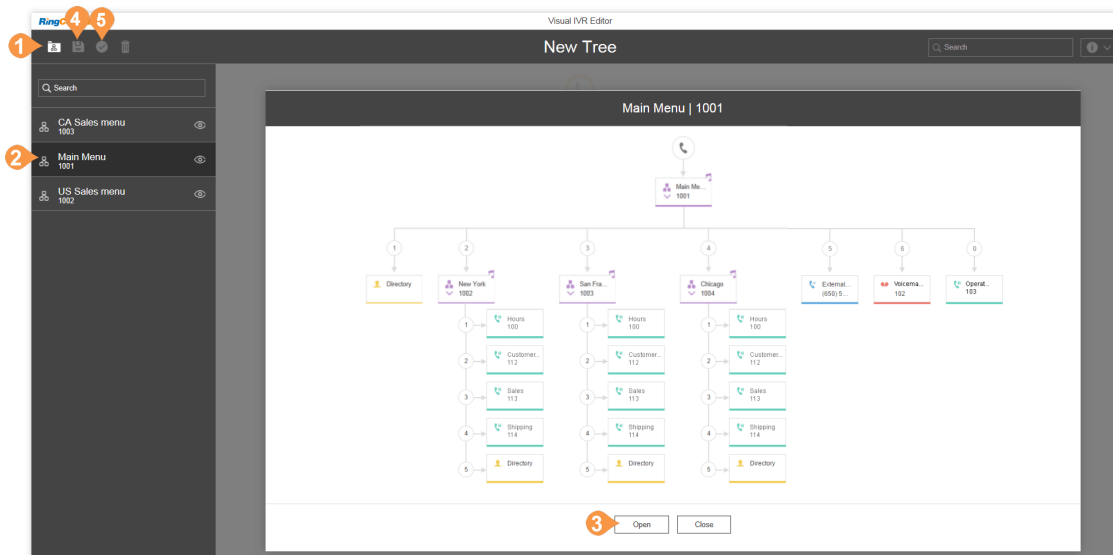
Call will disconnect

- 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.

The screenshot illustrates the steps for recording an audio prompt in the RingCentral Admin Portal. The interface is annotated with numbered callouts (1-6) corresponding to the instructions in the text. Callout 1 points to the 'Admin Portal' dropdown in the top right. Callout 2 points to the 'Auto-Receptionist' option in the left-hand navigation menu. Callout 3 points to the 'Prompts Library' tab in the top navigation bar. Callout 4 points to the 'Record Prompts' button in the main content area. Callout 5 points to the 'Record Prompt' pop-up window, and callout 6 points to the 'Prompt Name' input field within that window.

## 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.

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 active, showing sub-tabs for 'General Settings', 'IVR Menus', 'IVR Editor', and 'Prompts Library'. The 'IVR Menus' tab is selected, displaying a table of IVR menus. A table with columns 'Name', 'Numbers', 'Ext.', and 'Language' lists three IVR menus: 'IVR Menu 1001', 'IVR Menu 1002', and 'IVR Menu 1003'. A 'Prompt' pop-up window is overlaid on the table, showing 'Extension Info', 'Direct Numbers', 'Prompt', and 'Call Handling' options. The 'Prompt' option is selected. The 'IVR Prompt' pop-up window shows 'Prompt mode' with 'Audio' selected and a 'Select from Prompt Library' button. A 'Select Prompt' pop-up window is also shown, displaying a list of prompts: 'Main Menu.mp3' and 'Sales Menu.mp3'. The 'Select Prompt' window has a search bar and 'Cancel' and 'Save' buttons.

## 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**.

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 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) 2 Other(s)', and 'Phones & Devices'. The 'Auto-Receptionist' section is active, showing 'IVR Menus' as the selected tab. A table lists three IVR menus: 'IVR Menu 1001', 'IVR Menu 1002', and 'IVR Menu 1003'. The 'IVR Menu 1002' row is selected, and the 'Extension Info' pop-up is visible. Within this pop-up, the 'Prompt' tab is selected, and the 'Text to speech' option is chosen under 'Prompt mode'. The 'Text' input field is empty, and the 'Save' button is highlighted. The 'IVR Prompt' pop-up also shows a 'Delete Menu' button and a 'Please use the words "hash" or "pound" or "star" instead of "#" or "\*".' note.



## Recording Greetings and Messages

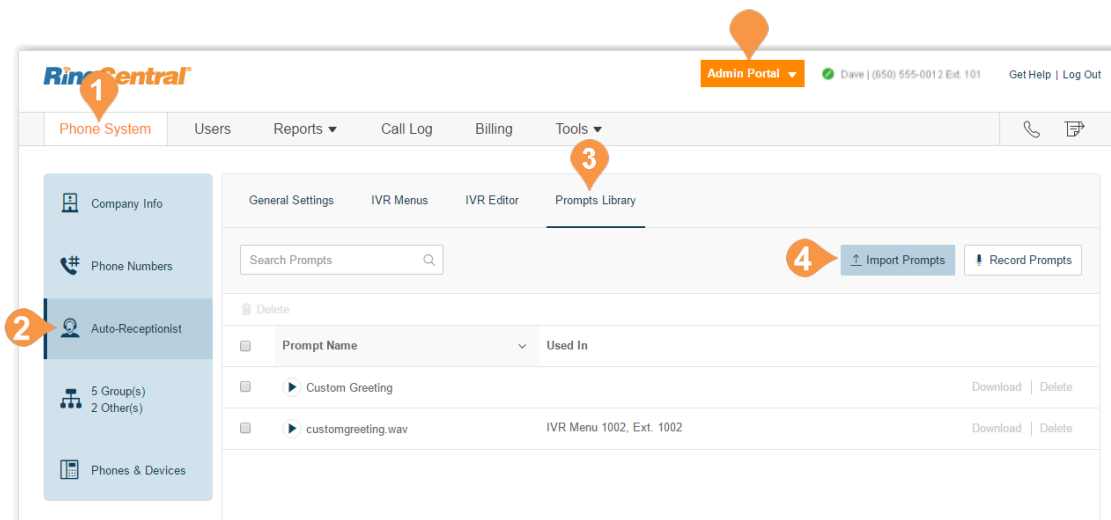
Several tasks require admins to record messages or greetings for your RingCentral system. These steps explain how to do the following:

- 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:

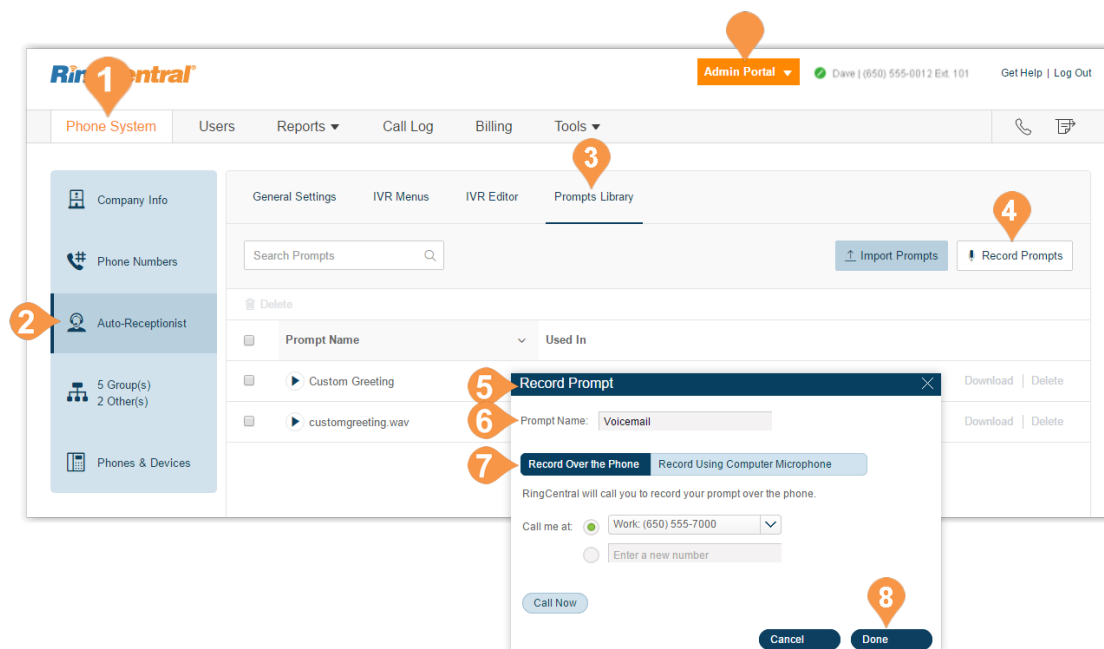
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **Prompts Library** tab.
4. Click the **Import Prompts** button.
5. A browser appears.
6. Navigate to the prompt file location.
7. Select the file and click **Open**.



## 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.

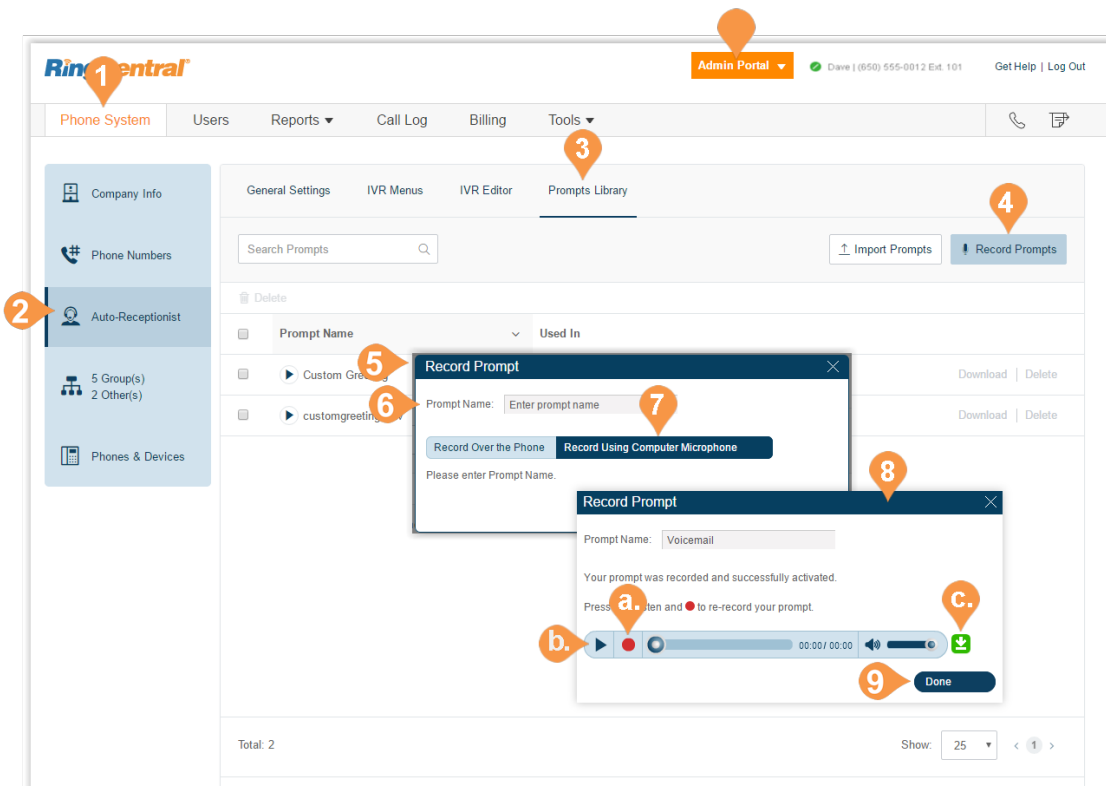
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. The **Record Prompt** pop-up appears.
6. Enter a name in the text field next to **Prompt Name**.
7. Click **Record Over the Phone**.
8. Click **Done**.



## 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**.

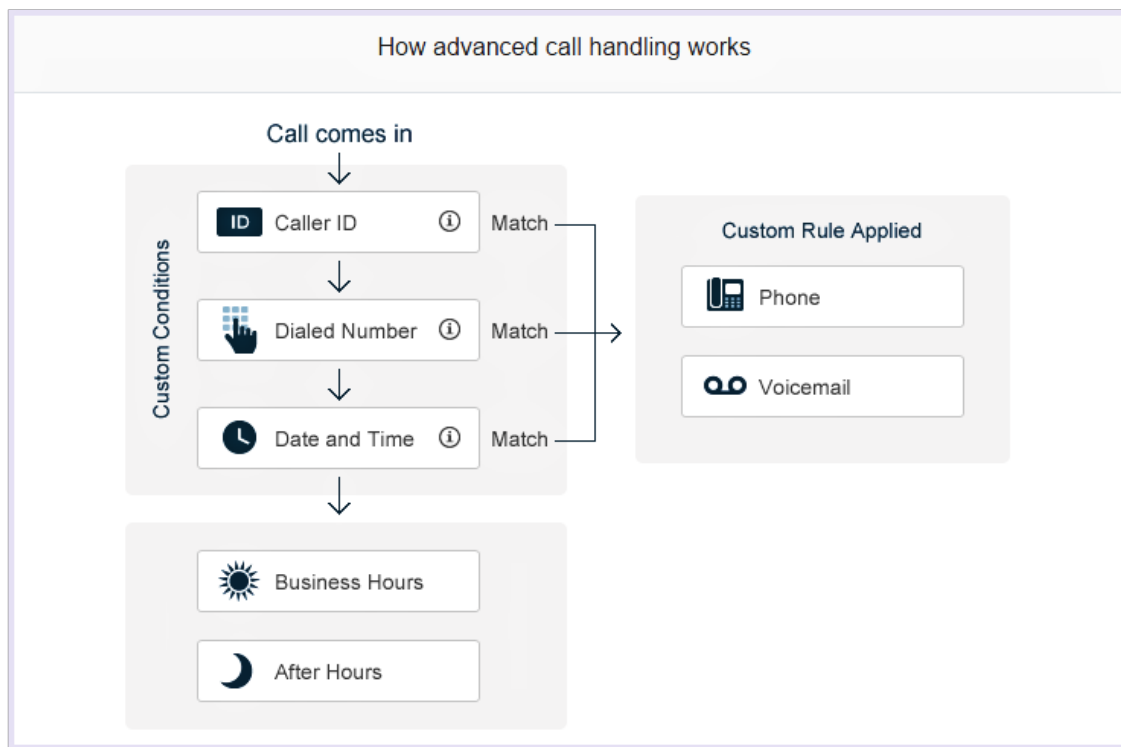


## Custom Rules

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.

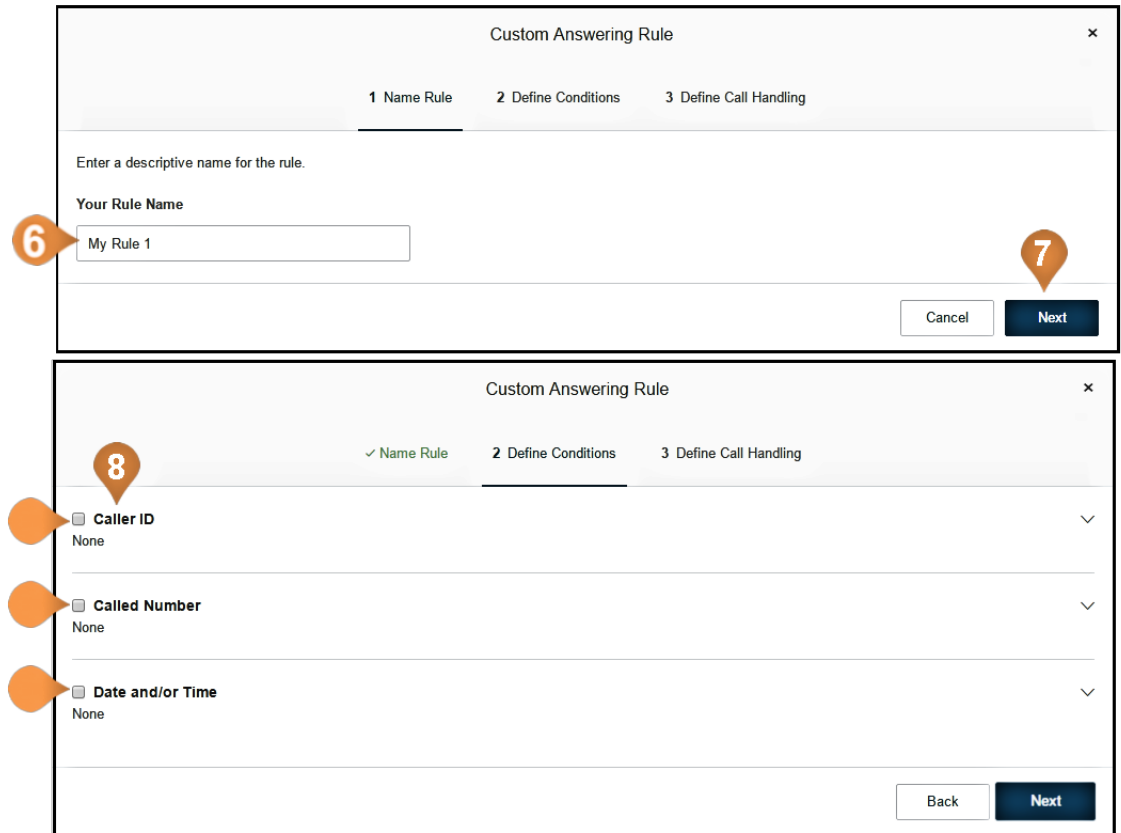
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Under the **General Settings** tab, click **IVR Settings**.
4. Under **Custom Answering Rules**, click **Custom Rule**.
5. Click **Add Rule**. The **Custom Answering Rule** pop-up appears.

Instructions continue on the following pages.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information for 'Dave | (650) 555-0012 Ext. 101'. The main navigation menu on the left includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Auto-Receptionist' sub-tab is selected. The main content area shows the 'IVR Settings' section under 'General Settings'. The 'IVR Settings' section includes 'Company Hours' (set to 24 hours), 'Company Greeting', 'Company Hours Greeting', and 'After Hours Greeting'. A 'Custom Answering Rules' section is visible at the bottom, with a 'Custom Rule' button highlighted. A pop-up window titled 'Custom Answering Rule' is shown at the bottom right, containing a description of multi-condition advanced call handling rules and an 'Add Rule' button.

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

*Instructions continue on the following pages.*



## Custom Rule Condition - Caller ID

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

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

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

### Custom 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 ⓘ

**2**

**Called Number**  
None

**Date and/or Time**  
None

**3**

## Custom Rule Condition - Called Number

Called Number applies the rule to the phone number dialed.

From the previous steps, then:

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

The image shows two screenshots from the RingCentral Admin interface. The top screenshot is titled "Custom Answering Rule" and is in the "2 Define Conditions" step. It shows three conditions: "Caller ID" (None), "Called Number" (checked), and "Date and/or Time" (None). The "Called Number" condition is expanded, showing a "Select Number" button. A callout "1" points to the "Called Number" checkbox, and callout "2" points to the "Select Number" button. At the bottom right, there are "Back" and "Next" buttons, with callout "5" pointing to the "Next" button.

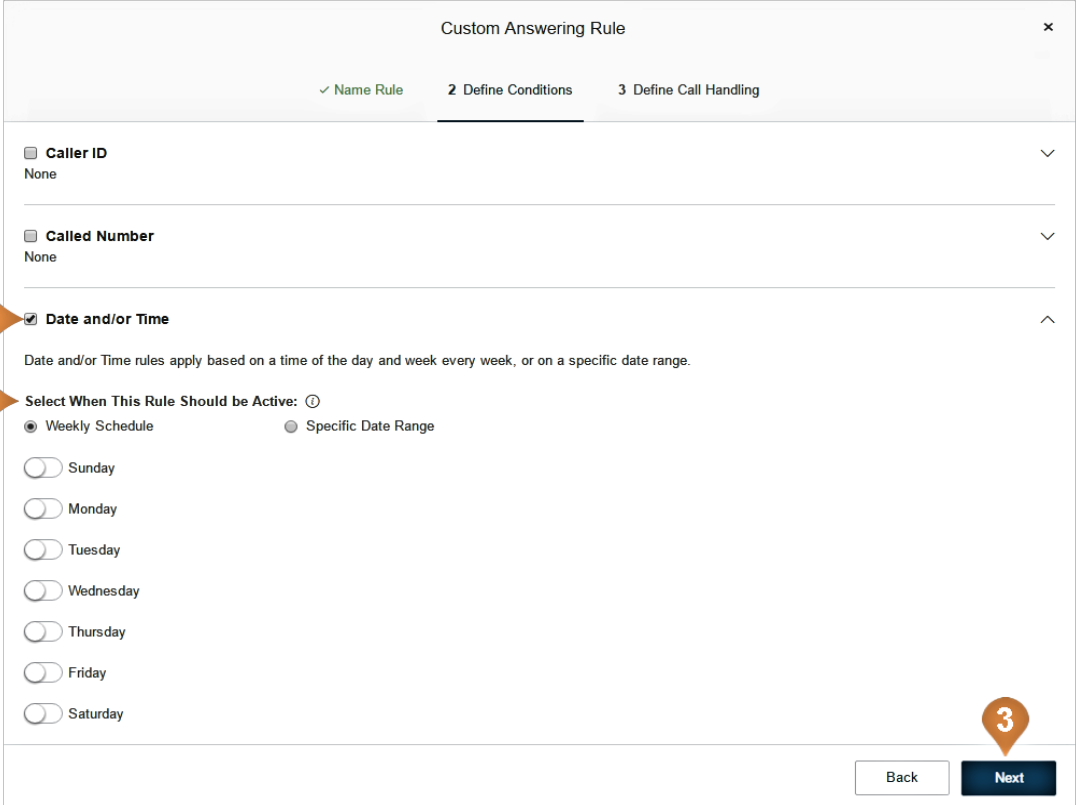
The bottom screenshot is titled "Select Number" and shows a search bar and a table of phone numbers. The table has columns for "Phone Number" and "Name". One row is visible with the phone number "(650) 555-0012". A callout "3" points to the checkbox next to this number. At the bottom, there is a "Total: 1" label, a "Show: 10" dropdown, a pagination control showing "1", and "Cancel" and "Save" buttons. Callout "4" points to the "Save" button.



## 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 77.



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: ⓪

Weekly Schedule     Specific Date Range

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Back    **3** 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**  
**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 71:

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

The list opens to this display.

### Add Custom Rules

To add a custom rule:

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

### Validate Custom Rules

To validate the list of created rules:

6. Click **Validate**.

### Edit Custom Rules

To edit an already created rule, click **Edit**.

# Call Groups

## Groups Listing

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

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

**Paging Only\*** groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices. To learn more about Paging Only groups, see [“Paging Only Group” on page 92](#).

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

**Park Locations** are private locations for your employees to park and pick up calls. Create up to 100 park locations for different groups of users in your phone system. To learn more about Park Locations, see [“Park Location Group” on page 108](#).

**Call Monitoring\*\*** allows you to set permissions that allow specific users to monitor the calls of other users. To learn more about Call Monitoring, see [“Call Monitoring Group” on page 112](#).

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

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

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

\*Not available for one-line accounts.

\*\*Available for Office Premium and Ultimate users only.

## Call Queue Group

## Call Queues

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

### Add a Call Queue Group

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

The screenshot illustrates the process of adding a call queue group in the RingCentral Admin Portal. The interface is annotated with numbered callouts (1-8) corresponding to the steps in the list.

**Step 1:** The **Admin Portal** is selected in the top right corner.

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

**Step 3:** The **Call Queues** tab is selected in the left sidebar.

**Step 4:** The **+ New Call Queue** button is clicked in the top right of the Call Queues section.

**Step 5:** The **Add Call Queue** modal is shown. The **Group Details** section includes input fields for:

- Extension Name
- Extension Number (value: 1)
- Manager's Email

**Step 6:** The **Next** button is clicked at the bottom right of the modal.

**Step 7:** The **Add Call Queue** modal is shown again, now with the **2 Select Users** step active. The text reads: "Select the members of the department, then click Done > Activate the Call Queue." Below this is a search bar and a department dropdown menu.

**Step 8:** The **Done** button is clicked at the bottom right of the modal. The list of users is visible below:

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"/> Somethinn1234 New4321	101	

The total number of selected users is 2, and the total number of users in the department is 4.

## 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 configuration process for a Call Queue in the RingCentral Admin Portal. The interface is divided into several sections:

- Top Bar:** Shows the user's name (Dave) and contact information (650) 555-0012 Ext. 101, along with 'Get Help' and 'Log Out' options.
- Navigation:** Includes tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'.
- Left Sidebar:** Contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '11 Group(s) & 6 Other(s)', and 'Phones & Devices'.
- Main Content Area:** Displays the 'Call Queues' tab with a search bar and a '+ New Call Queue' button. Below is a table of existing call queues:
 

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
●	Quality Control Call Qu...		11	0 / 0		
●	Sales Call Queue		7	0 / 0	2 / 0	
- Info Pop-up:** A modal window for editing the 'IT Helpdesk' queue. It contains the following fields:
  - Extension Number: 10
  - Group Name: IT Helpdesk
  - Record Call Queue Name: [Dropdown]
  - Company Name: [Text]
  - Contact Phone: [Text]
  - Manager Email: name@yourcompany.com
  - Address: [Text]
  - Call Queue Hours: 24 hours
  - Call Queue Members: 1
  - Overflow Call Queues: 1
  - Regional Settings: [Dropdown]
  - Resend Welcome Email: [Text]
  - Status: Not Activated
- Buttons:** 'Delete Call Queue', 'Cancel', and 'Save' buttons are located at the bottom 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 87.
5. Click **Overflow Call Queues**.
6. The **Overflow Call Queues** pop-up appears. Select a maximum of three groups from the **Available Queues** list.
7. Use the arrow buttons to move them to the **Selected Queues** list.
8. Click **Save**. On first use, an Alert pop-up appears. Select whether to **Keep disabled and save** or **Enable and save** the selected overflow queue.

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

The screenshot illustrates the configuration process for overflow call queues in the RingCentral Admin Portal. It shows the navigation path from the Phone System tab to the Call Queues section, where an existing queue is selected. The 'Overflow Call Queues' section is then used to select additional queues to be added to the overflow list. The 'Overflow Call Queues' pop-up window is shown with the 'Send Calls to Overflow Queue' toggle enabled, and two queues selected in the 'Selected Queues' list. The 'Save' button is highlighted, indicating the final step in the configuration process.

## 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.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' tab is active, showing the user 'Dave | (850) 555-0012 Ext. 101'. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' section is expanded, showing 'Company Info', 'Phone Numbers', 'Receptionist', '11 Group(s) 0 Other(s)', and 'Phones & Devices'. The '11 Group(s) 0 Other(s)' option is selected, leading to a list of call queues. The 'IT Helpdesk Ext. 4' queue is selected, and the 'Direct Numbers' button is clicked. A modal window titled 'Add Direct Number' is displayed, showing the 'Select Number Type' options: Local (Domestic), Toll-Free, Vanity, and International. The 'Local (Domestic)' option is selected. Below this, there are dropdown menus for 'Select State/Province' and 'Select Area Code'. The 'Next' button is highlighted, indicating the final step in the process.

Legal Privacy  
 © 1999 - 2016 RingCentral Intellectual Property  
 All rights reserved. RingCentral and the RingCentral logo are trademarks of RingCentral, Inc.

## 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**.

The screenshot illustrates the process of setting a call queue greeting in the RingCentral Admin Portal. It shows the navigation path from the Admin Portal to the Phone System tab, then to Groups, Call Queues, and selecting a specific queue (IT Helpdesk). The Greeting settings for this queue are shown as 'On', with a 'Set Greeting' button. Below this, three sequential pop-up windows are shown: 1) The 'Set Greeting' dialog with 'Default' selected and a preview of the default message. 2) The 'Set Greeting' dialog with 'Record Over the Phone' selected, showing a 'Call me at' dropdown menu. 3) The 'Set Greeting' dialog with 'Custom' selected, showing an 'Upload WAV or MP3 file' section with a 'Browse' button and an 'Attach' button.

## 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.

The screenshot shows the RingCentral Admin Portal interface. At the top, there's a navigation bar with 'Admin Portal' and user information. Below that, a secondary navigation bar contains 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The main content area is divided into several sections: 'Company Info', 'Phone Numbers', 'Receptionist', '11 Group(s) 6 Other(s)', and 'Phones & Devices'. The 'Call Queues' section is active, showing a table with columns for 'Status' and 'Name'. The 'Call Handling' tab is selected, displaying options for 'Call Queue Hours' and 'After Hours'. The configuration panel includes settings for 'Decide how calls get transferred to group members' (Rotating, Simultaneous, In fixed order), 'Audio while connecting' (On/Off), 'Set Audio' (Acoustic), 'Interrupt Audio' (Never), 'Hold music' (On/Off), 'Set Hold Music' (Acoustic), and 'Member availability and hold times'. A 'Save' button is visible at the bottom right of the configuration panel.

Legal Privacy

© 1999 - 2018 RingCentral Intellectual Property  
All rights reserved. RingCentral and the RingCentral logo are trademarks of RingCentral, Inc.

## 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**. 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.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' tab is active, and the user is identified as 'Dave | (650) 555-0012 Ext. 101'. The navigation menu on the left includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is selected, and the 'Groups' section is expanded to show '11 Group(s)' and '6 Other(s)'. The 'Call Queues' tab is selected, and the 'IT Helpdesk Ext. 10' queue is chosen. The 'Messages & Notifications' section is active, and the 'Voicemail Greeting' option is selected. A pop-up window titled 'Call Queue Voicemail Greeting' is open, showing the 'Default' greeting selected. The pop-up includes a 'Record Over the Phone' button and an 'Import' button. The 'Call me at' field is empty, and the 'Call Now' button is visible. The 'Save' button is highlighted in the bottom right corner of the pop-up.

## 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 displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown shows the user 'Dave | (850) 555-0012 Ext. 101'. The navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar contains 'Company Info', 'Phone Numbers', 'Receptionist', '11 Group(s) 6 Other(s)', and 'Phones & Devices'. The main content area shows 'Call Queues' with a search bar and a list of queues. A 'Messages & Notifications' panel is open, showing 'Voicemail Greeting' set to 'Default' and 'Message Recipient' set to 'Ext. 10, IT Helpdesk'. A 'Select Message Recipient' pop-up window is displayed, showing a table of recipients with columns for 'Select', 'Name', 'Ext.', 'Type', and 'Department'. The table lists: 'Fax Group 1' (Ext. 3, Message-Only Extension), 'Holiday' (Ext. 15, Message-Only Extension), 'John Smith' (Ext. 1002, User), 'Sandra Brown' (Ext. 101, User), 'Shared Line - message only' (Ext. 17, Message-Only Extension), 'shared line 1' (Ext. 8, Shared Lines), and 'This call queue' (Ext. 10, Call Queue). The 'Done' button is highlighted in the pop-up.

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	

## 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**.

The screenshot illustrates the RingCentral Admin Portal interface for configuring call queue notifications. The interface is organized into several key sections:

- Top Navigation:** Includes the 'Admin Portal' dropdown, user information (Dave | (650) 555-0012 Ext. 101), and 'Get Help | Log Out' links.
- Main Navigation:** Features tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'.
- Left Sidebar:** Contains 'Company Info', 'Phone Numbers', 'Receptionist', '11 Group(s) & Other(s)', and 'Phones & Devices'.
- Call Queues Section:** Displays a list of call queues, with 'IT Helpdesk Ext. 10' selected. Below the queue name are options for 'Direct Numbers', 'Greeting', and 'Call Handling'.
- Messages & Notifications Section:** Includes a 'Take messages' area with 'Voicemail Greeting' (set to Default) and 'Message Recipient' (set to Ext. 10, IT Helpdesk). It also features a 'New Call Queue' button.
- Notifications Pop-up:** A modal window titled 'Notifications' is open, allowing configuration of notification preferences. It includes checkboxes for 'Notify me of' (Voicemail Messages, Received Faxes, Missed Calls, Received Text Messages) and 'Send notifications to' (Email, Phone number). The 'Advanced Notification Options' link is highlighted.
- Bottom of Page:** Shows 'Total: 4' and 'Show: 25' with navigation arrows.



## 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 displays the RingCentral Admin Portal interface for adding a new Paging Only group. The navigation menu on the left shows 'Groups' selected (2). The top navigation bar has 'Phone System' selected (1) and the 'Paging Only' tab active (3). The main content area shows a '+ New Paging Only' button (4). The form fields for 'Group Name' (5) and 'Extension Number' (6) are visible, along with a 'Save' button.

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

Total: 2

Cancel Save Show: 25 < 1 >

Legal Privacy  
© 1999 - 2016 RingCentral Intellectual Property  
All rights reserved. RingCentral and the RingCentral logo are trademarks of RingCentral, Inc.

## Configure a Paging Only Group .

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

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

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', user information 'Dave | (650) 555-0012 Ext. 101', and 'Get Help | Log Out'. The main navigation tabs are 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, showing sub-tabs for 'Call Queues', 'Paging Only', 'Shared Lines', 'Park Locations', 'Call Monitoring', 'IVR Menus', and 'Others'. The 'Paging Only' sub-tab is selected, displaying a table with columns for 'Status' and 'Name'. Two groups are listed: 'Paging Only 1' and 'Support'. A search bar is present above the table. On the right side, there is a '+ New Paging Only' button and a 'Cancel' button. The 'Info' pop-up is open, showing fields for 'Extension Number' (12), 'Group Name' (Inventory Area), and 'Status' (Enabled). The 'Paging' pop-up is also open, showing 'Devices to receive page' and 'Users allowed to page this group' sections. The 'Done' button is visible at the bottom right of the 'Paging' pop-up. The bottom of the screen shows 'Total: 2' and a 'Show: 25' dropdown menu.

## 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

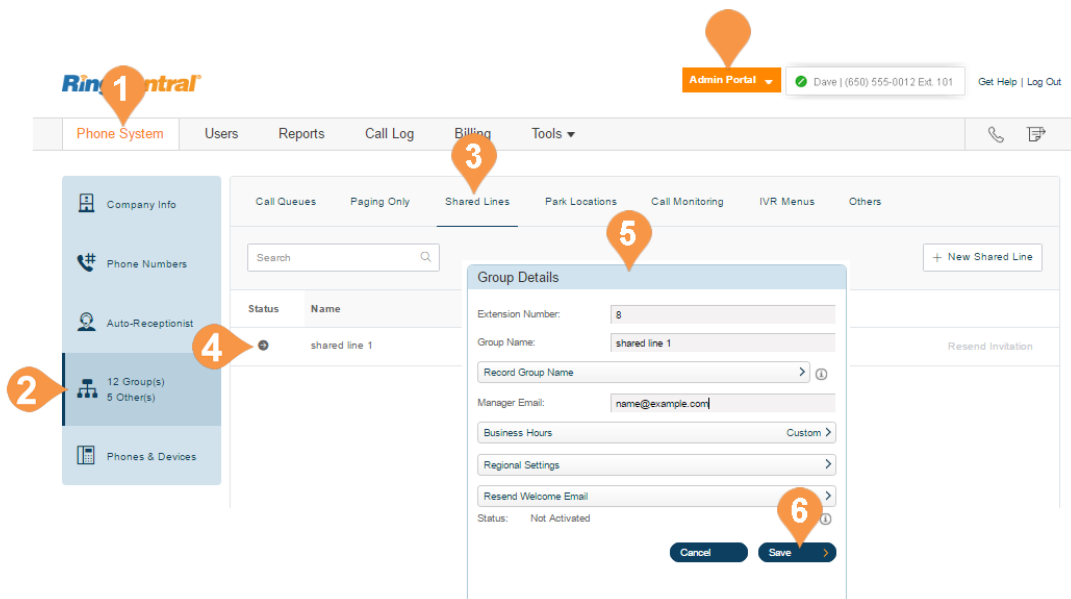
1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Click **New Shared Line**.  
The **Add Shared Line** pop-up appears.
5. Select a location: **Domestic** or **International**.
6. Enter the **Group Name**, **Manager's Email**, and **Extension**.
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 illustrates the RingCentral Admin Portal interface for adding a shared line group. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, user information (Dave | 020 8554 0023 Ext. 101), and links for 'Get Help' and 'Log Out'. The main navigation menu includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' sidebar is expanded to show 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '12 Group(s) 5 Other(s)', and 'Phones & Devices'. The 'Shared Lines' tab is selected, displaying a table with columns for Status, Name, Numbers, Ext., and Messages. A '+ New Shared Line' button is visible in the top right of the main content area. The 'Add Shared Line' pop-up window is open, showing a progress bar with steps: 1 Setup, 2 Add Lines, 3 Add Phones, 4 Emergency Address, 5 Shipping Address, and 6 Confirmation. The 'Select a Location' section has 'Domestic' selected. The 'Group Details' section includes input fields for 'Group Name', 'Manager's Email', and 'Extension' (with the value '1'). 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.

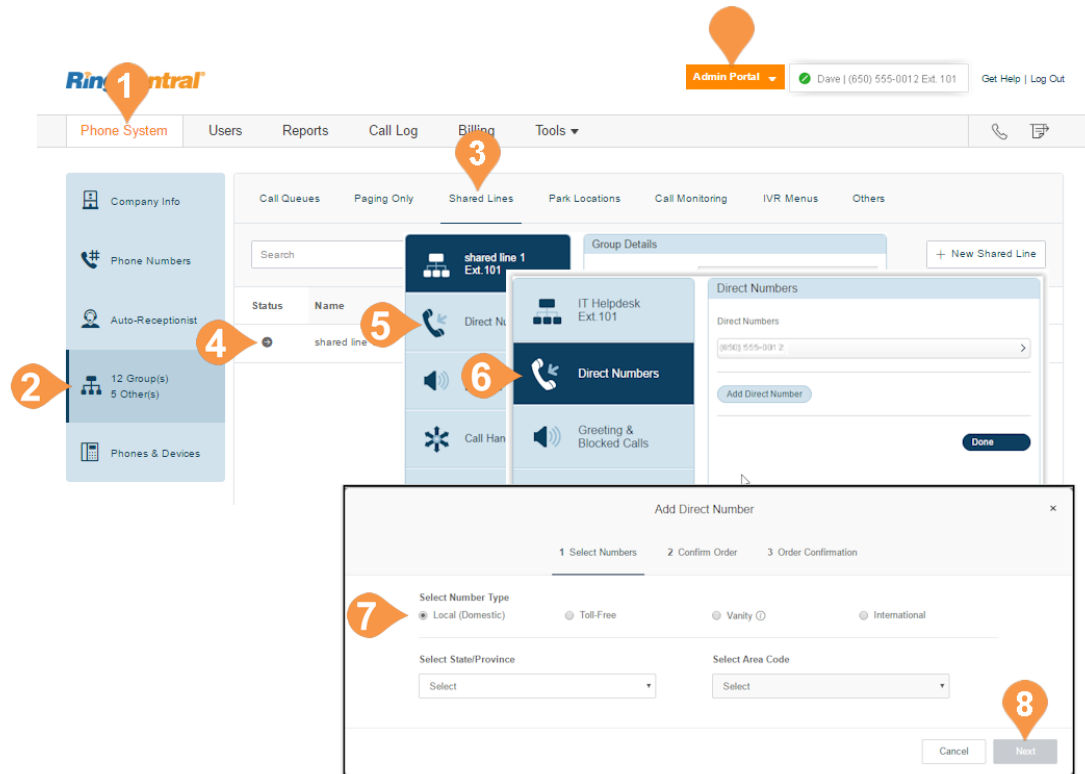
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select a Shared Line from the list. See page 96 for instructions on how to create a Shared Line.
5. Edit the **Group Details** information:
  - a. **Extension Number**
  - b. **Group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



## Add a Direct Number

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

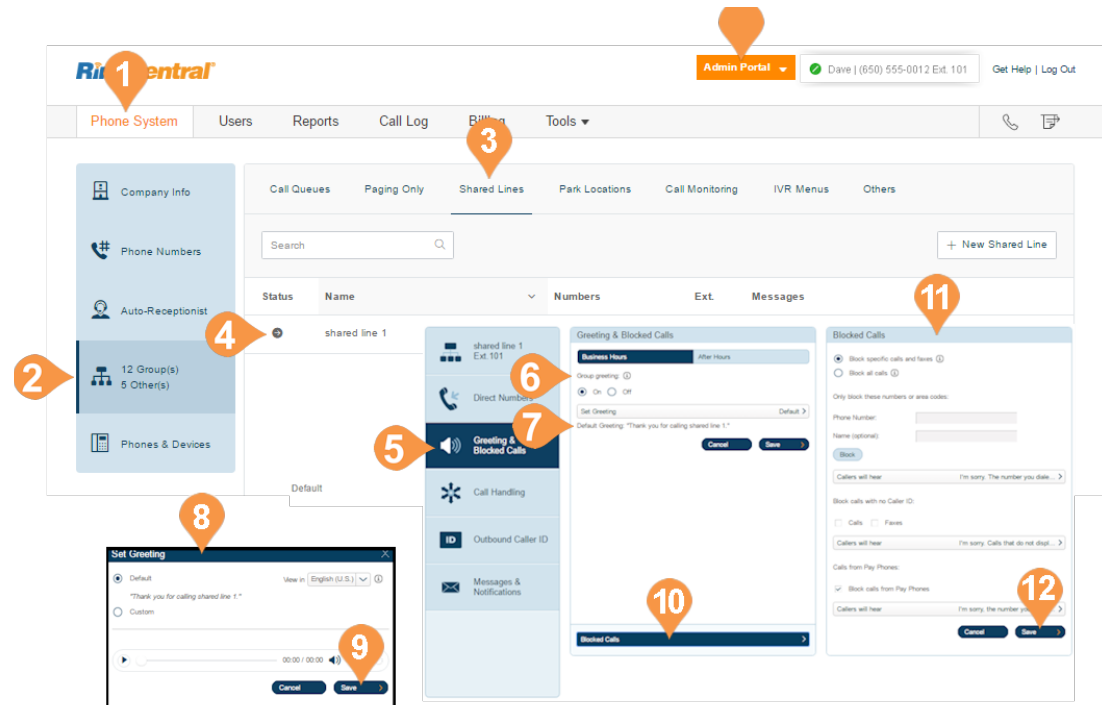
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Follow these instructions to select the type of number:
  - a. **Local**: Select the button next to **Local (Domestic)**. Provide the State/Province and Area Code and Select Number.
  - b. **Toll-Free Number**: Select the button for **Toll-Free**. 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**.





## Set Custom Music on Hold

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

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

To set up custom Music on Hold:

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

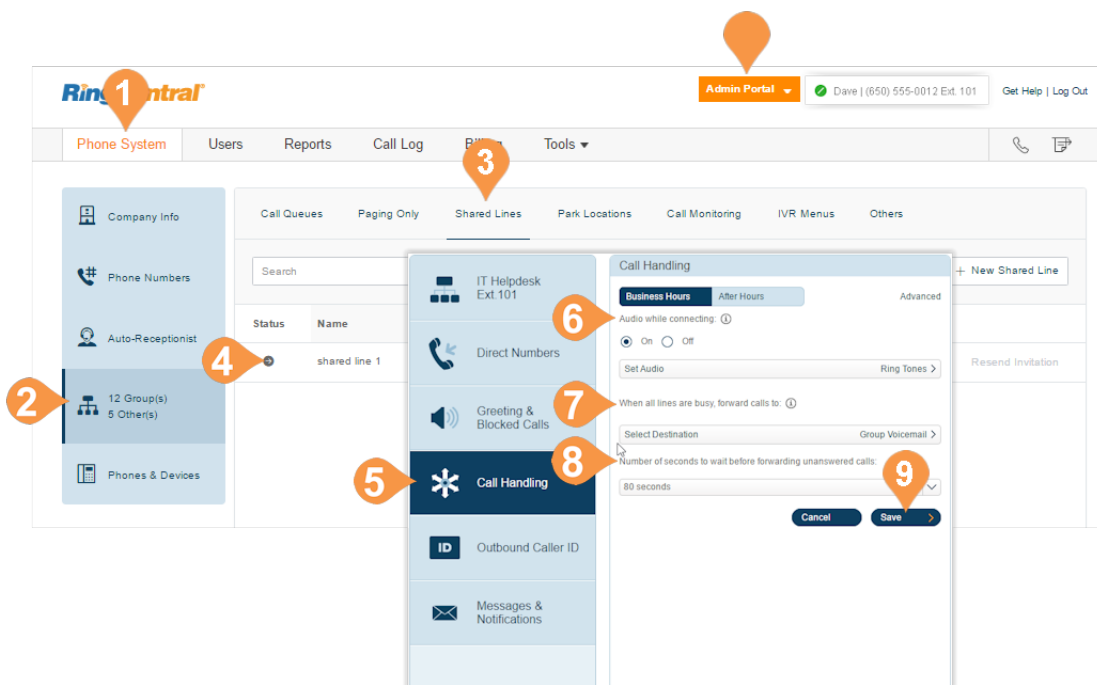
The screenshot illustrates the steps to set custom Music on Hold for a Shared Lines group in the RingCentral Admin Portal. The interface is annotated with numbered callouts (1-10) corresponding to the instructions:

1. Select the **Phone System** tab in the top navigation.
2. Click on **Groups** in the left sidebar.
3. Click on the **Shared Lines** tab in the main content area.
4. Select an existing Shared Lines group (e.g., 'shared line 1').
5. Click on the **Greeting** tab for the selected group.
6. Under the **Hold Music** section, check the **Enable** checkbox.
7. Click the **Edit** button to customize the Music on Hold.
8. In the **Hold Music** dialog box, select the audio type (e.g., **Acoustic**) and choose or upload music.
9. Click the **Done** button in the dialog box.
10. Click the **Save** button at the bottom right of the Greeting configuration page.

## 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**.

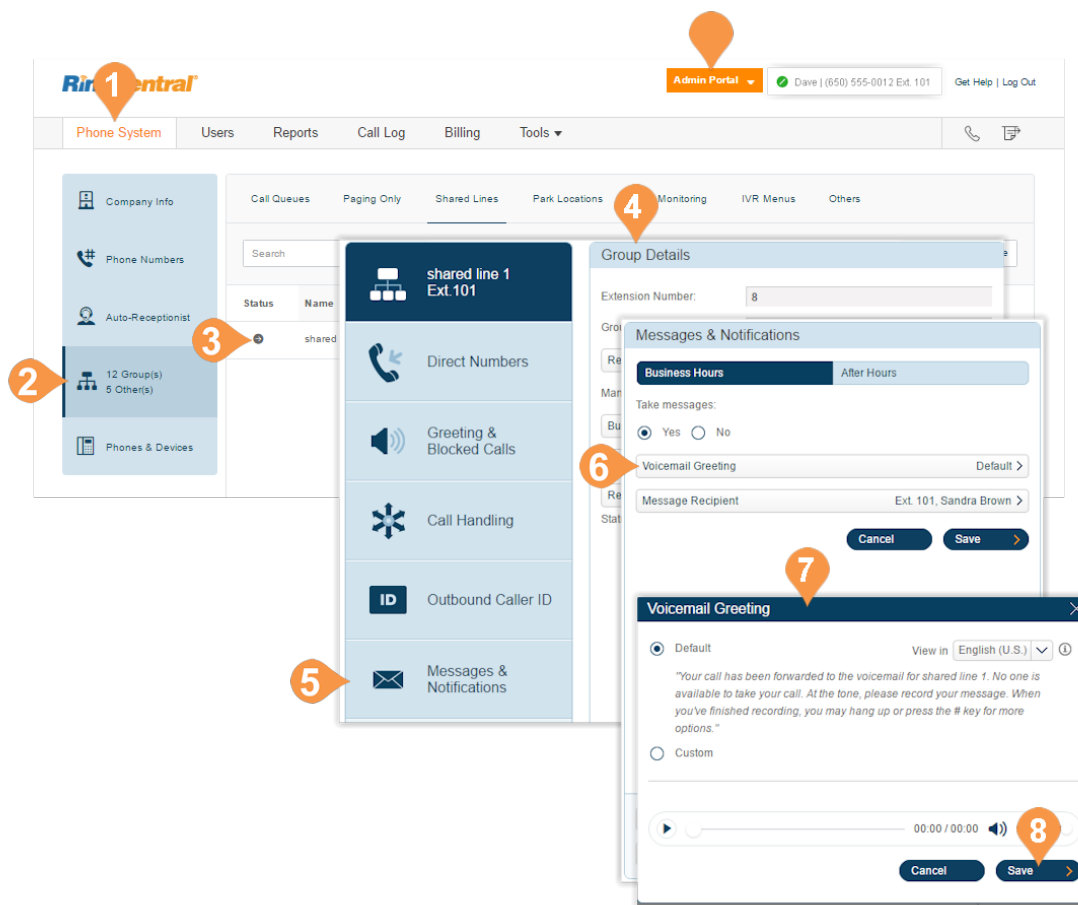
The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible, along with the user name 'Dave | (850) 555-0012 Ext. 101' and 'Get Help | Log Out' links. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and '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 main content area shows a table with one entry: 'shared line 1'. A modal window titled 'Outbound Caller ID' is open, showing options for 'Group' (selected) and 'Individual Lines'. A dropdown menu is open under 'Group', showing '(850) 555-0012 Main Number' and 'Not specified'. The 'Save' button is highlighted. Numbered callouts (1-7) indicate the steps: 1. Admin Portal, 2. Groups, 3. Shared Lines, 4. shared line 1, 5. Outbound Caller ID, 6. Group, and 7. 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 process of setting a message recipient for a Shared Line in the RingCentral Admin Portal. The interface shows the 'Phone System' tab with 'Shared Lines' selected. A sidebar on the left has 'Groups' selected, and a 'Messages & Notifications' pop-up is open. A 'Select Message Recipient' dialog is also shown, displaying a table of 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.

The screenshot illustrates the RingCentral Admin Portal interface with numbered callouts (1-9) indicating the steps to enable Voicemail Preview:

1. The **Admin Portal** dropdown menu is highlighted.
2. The **Phone System** tab is selected in the top navigation bar.
3. The **Shared Lines** sub-tab is selected in the secondary navigation bar.
4. A group of extensions is selected in the left sidebar, with the **Messages & Notifications** option highlighted.
5. The **Messages & Notifications** configuration panel is open, and the **Voicemail Preview** option is selected.
6. The **Voicemail Preview** pop-up dialog is displayed, showing the **On** radio button selected.
7. The **Voicemail Preview** dialog title bar is highlighted.
8. The **On** radio button is highlighted.
9. The **Save** button in the dialog is highlighted.

## Notifications

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

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

The screenshot illustrates the RingCentral Admin Portal interface for configuring notifications. The top navigation bar includes the 'Admin Portal' dropdown, user information (Dave | (650) 555-0012 Ext. 101), and 'Get Help | Log Out'. The main navigation menu has 'Phone System' selected, with sub-tabs for 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' sub-menu is open, showing 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '12 Group(s) 5 Other(s)', and 'Phones & Devices'. The 'Shared Lines' tab is selected, displaying a table with columns for 'Status' and 'Name'. A 'Messages & Notifications' pop-up window is open, showing 'Business Hours' and 'After Hours' tabs, 'Take messages' options (Yes/No), 'Voicemail Greeting', and 'Message Recipient'. A 'Notifications' pop-up window is also open, showing notification settings for 'Voicemail Messages', 'Received Faxes', 'Missed Calls', and 'Received Text Messages'. It includes fields for 'Send notifications to' (Email and Phone number) and 'Advanced Notification Options'. Numbered callouts (1-8) indicate the steps: 1. Admin Portal, 2. Phone System, 3. Shared Lines, 4. Shared Lines group, 5. Messages & Notifications, 6. Notifications, 7. Notification settings, and 8. 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 'Admin Portal' and user information. The main navigation menu shows 'Phone System' selected. The left sidebar contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '14 Group(s) 6 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 'Park Locations' tab is active, showing a search bar and a '+ New Park Location' button. Below the search bar is a table with columns for Status, Name, and Ext. Two entries are listed: 'Park Location 10001' and 'Park Location 10002', both with a status of 'Disable'. A pop-up window titled 'Add Park Location' is open, showing input fields for 'Group Name' and 'Extension Number' (with '10001' entered). The 'Save' button is highlighted.

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

## 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**.

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 includes 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '14 Group(s) 6 Other(s)', and 'Phones & Devices'. The main content area shows a 'Park Locations' tab selected, with a search bar and a table of Park Locations. A pop-up window titled 'Info' is open, showing fields for 'Extension Number' (10002), 'Park Location Name' (Park Location 10002), and 'Status' (Enabled). The 'Save' button is highlighted with a callout.

## Add Users to a Park Location

To add or remove users from a Park Location:

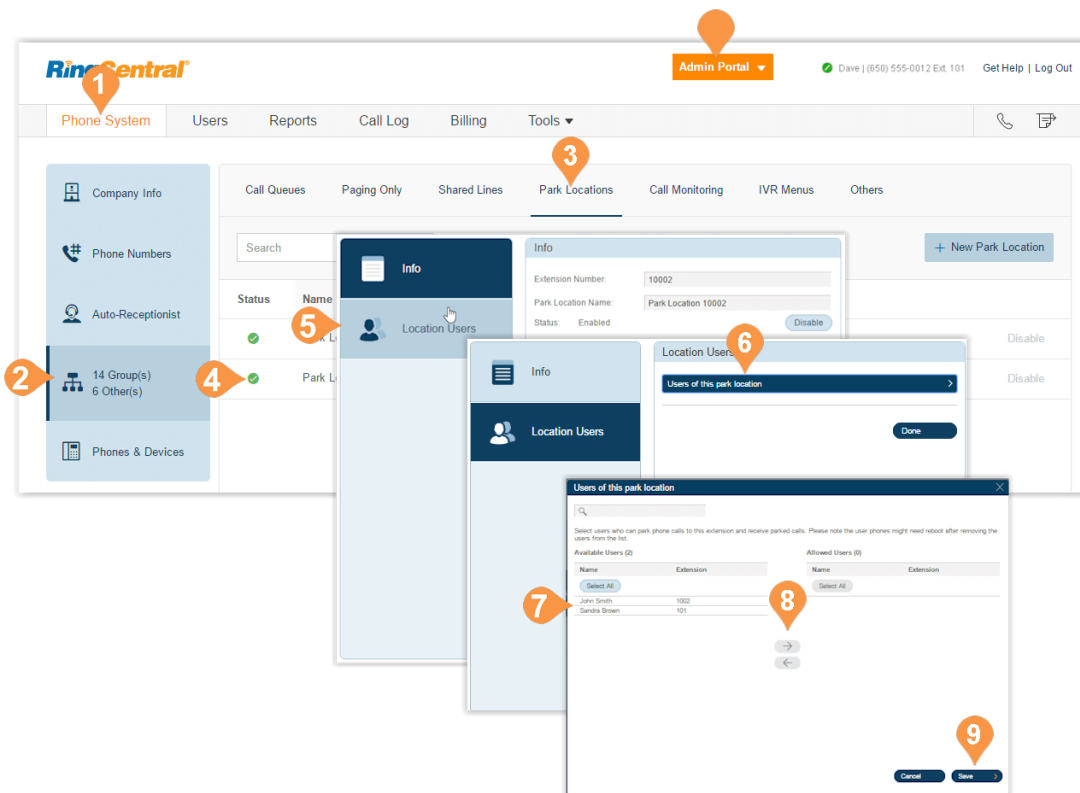
1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Park Location** tab.
4. Select an existing **Park Location**.
5. Click **Location Users**.
6. Click **Users of this park location**.
7. Select users you'd like to add to the group from the right column.
8.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

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

## Enable this Park Location

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

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



# Call Monitoring Group

## Call Monitoring Group\*

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

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

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

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

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

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

\*Available for Office Premium and Ultimate users only.

## 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.

The screenshot illustrates the process of creating a Call Monitoring Group in the RingCentral Admin Portal. The interface shows the 'Phone System' tab selected, with the 'Call Monitoring' sub-tab active. A 'New Call Monitoring' button is visible in the top right of the main content area. A pop-up window titled 'Call Monitoring Group' is shown in three stages, each annotated with a numbered orange circle:

- Step 1:** 'Define Group Name'. The 'Group Name' field is populated with 'Call Monitoring Group'.
- Step 2:** 'Select users that can monitor'. A table lists users with checkboxes for selection. The table has columns for Name, Ext., and Type.
- Step 3:** 'Select users that can be monitored'. A table lists users with checkboxes for selection. The table has columns for Name, Ext., and Type.

Buttons for 'Next', 'Back', and 'Save' are visible at the bottom of the pop-up windows.

# 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 displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, the user name 'Dave | (650) 555-0012 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', and 'Tools'. The 'Phone System' tab is selected, and the 'Others' sub-tab is active. A table lists existing extensions, including 'Announcements-Only E...' and 'Add Messages-Only Extension'. A pop-up form titled 'Add Messages-Only Extension' is open, with fields for 'Extension Name', 'Extension Number' (containing '1'), and 'Email'. A 'Save' button is visible at the bottom right of the form.

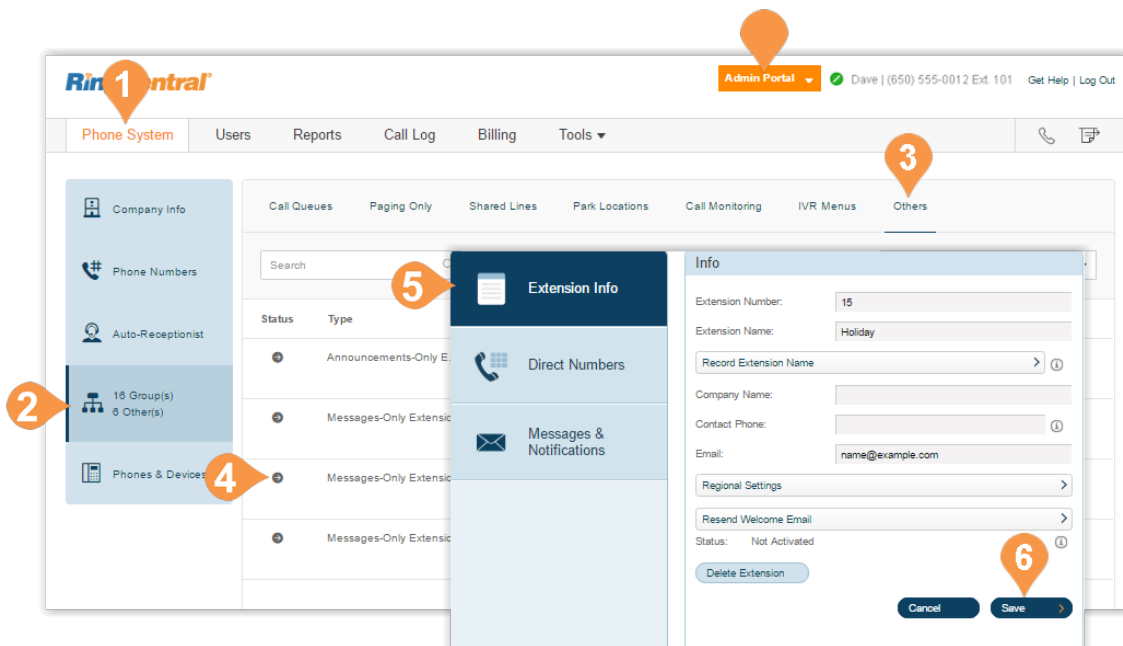
## Configure a Message-Only Extension

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.

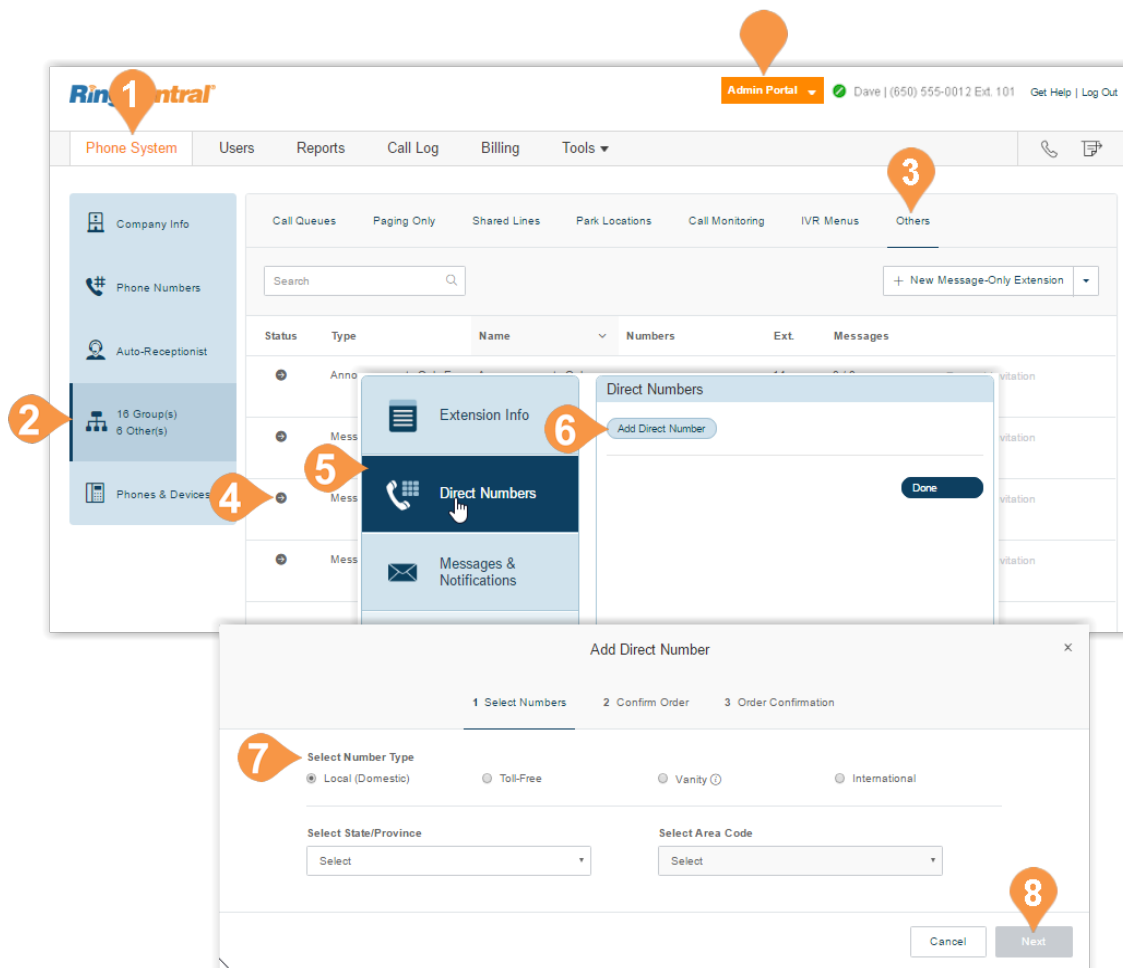
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Extension Info** to edit the following:
  - a. **Extension Number**
  - b. **Extension Name**
  - c. **Record Extension Name**
  - 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 displays the RingCentral Admin Portal interface. The top navigation bar includes the 'Admin Portal' dropdown, user information 'Dave | (650) 555-0012 Ext. 101', and 'Get Help | Log Out'. The main navigation menu has 'Phone System' selected, with other options like 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' sub-menu is open, showing 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '16 Group(s) (6 Other(s))', and 'Phones & Devices'. The '16 Group(s) (6 Other(s))' option is highlighted with a callout '2'. The 'Others' tab is selected in the sub-menu, with a callout '3'. The main content area shows a search bar and a list of extensions. A 'Message-Only Extension' is selected with a callout '4'. The 'Messages & Notifications' option is clicked, with a callout '5'. The 'Message Recipient' option is selected, with a callout '6'. The 'Select Message Recipient' pop-up window is shown, with a callout '7'. The table in the pop-up lists various extensions and users. The 'Done' button is clicked, with a callout '8'. The 'Messages & Notifications' pop-up is shown again, with the 'Save' button clicked, with a callout '9'.

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 checked="" 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**.
7. A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
  - a. **Default**: Select the button next to **Default**.
  - b. **Custom**: Select the button next to **Custom** and select how you'd like to set your custom recording:
    - **Record Over the Phone**  
Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and RingCentral will call you to record your message.
    - **Import**  
Browse for a WAV or MP3 file you want to use. Click **Attach**, then **Save**.
    - **Record Using Computer Microphone**  
Click **Allow** if RingCentral asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your company greeting.
8. Click **Save**.

The screenshot illustrates the RingCentral Admin Portal interface. At the top, the 'Admin Portal' header shows the user 'Dave | (650) 555-0012 Ext. 101' with 'Get Help | Log Out' options. The navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The sidebar on the left contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '10 Group(s) / 8 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'. A table of extensions is visible, with a 'Messages & Notifications' button highlighted. A 'Voicemail Greeting' pop-up window is open, showing the 'Default' greeting: 'Your call has been forwarded to the voicemail for Shared Line - message only. 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.' The pop-up also includes a 'Custom' option, a 'Record Over the Phone' section with a timer and volume control, and 'Cancel' and 'Save' buttons.

## 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.

The screenshot illustrates the steps to set Voicemail Preview in the RingCentral Admin Portal. The interface shows the 'Phone System' tab selected, with the 'Groups' section expanded to show '16 Group(s)' and '8 Other(s)'. The 'Others' tab is selected, and a 'Message-Only Extension' is chosen. The 'Messages & Notifications' section is open, and the 'Voicemail Preview' option is selected. The 'Voicemail Preview' pop-up is shown with the 'On' radio button selected and the 'Save' button highlighted.

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**.

## 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**.
  - 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**.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', user information 'Dave | (650) 555-0012 Ext. 101', and 'Get Help | Log Out'. The main navigation menu has '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) & 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 'Others' tab is selected, displaying a table of Message-Only Extensions. A table with columns 'Status', 'Type', 'Name', 'Numbers', 'Ext.', and 'Messages' is visible. A table row shows 'Announcements-Only E...' with 'Announcements Only' type, '14' numbers, and '0 / 0' messages. A '+ New Message-Only Extension' button is present. A 'Messages & Notifications' pop-up window is open, showing 'Voicemail Greeting' (Default) and 'Message Recipient' (Ext. 17, Shared Line - message...). A 'Notifications' pop-up window is also open, showing notification settings for 'Voicemail Messages', 'Received Faxes', 'Missed Calls', and 'Received Text Messages'. The 'Notifications' window has 'By Email' checked for 'Voicemail Messages' and 'Received Text Messages'. The 'Send notifications to:' section shows an email address 'dave.richards@mycompany.com' and a phone number field with a 'Select Carrier' dropdown. A '7a. Advanced Notification Options' button is visible at the bottom of the 'Notifications' window. A '7' callout points to the 'Messages & Notifications' tab in the sidebar. A '6' callout points to the 'Messages & Notifications' pop-up window. An '8' callout points to the 'Save' button in the 'Notifications' pop-up window.

# 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 displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' header is visible. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar shows 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '16 Group(s) 6 Other(s)', and 'Phones & Devices'. The main content area is under the 'Others' tab, showing a table with columns for 'Status', 'Type', 'Name', 'Numbers', 'Ext.', and 'Message'. A dropdown menu is open, showing options for '+ New Message-Only Extension' and '+ New Announcements-Only Extension'. A pop-up form titled 'Add Announcements-Only Extension' is displayed, with fields for 'Extension Name', 'Extension Number' (containing '1'), and 'Email'. At the bottom of the form 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**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' is selected, and the user is identified as 'Dave | (650) 555-0012 Ext. 101'. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar shows 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '16 Group(s) 8 Other(s)', and 'Phones & Devices'. The main content area features a search bar and a '+ New Message-Only Extension' button. Below is a table of extensions with columns for Status, Type, Name, Numbers, Ext., and Messages. An 'Extension Info' modal is open, showing fields for Extension Number, Extension Name, Company Name, Contact Phone, Email, Regional Settings, and Resend Welcome Email. The modal also includes a 'Delete Extension' button and 'Cancel' and 'Save' buttons at the bottom.

## 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.

The screenshot illustrates the process of adding a direct number to an announcement-only extension in the RingCentral Admin Portal. The interface is divided into several sections:

- Admin Portal Header:** Shows the user's name (Dave) and extension (650) 555-0012 Ext. 101, along with navigation links for Help and Log Out.
- Phone System Tab:** The main navigation menu includes Phone System, Users, Reports, Call Log, Billing, and Tools.
- Left Sidebar:** Contains navigation options for Company Info, Phone Numbers, Auto-Receptionist, and Phones & Devices.
- Main Content Area:**
  - Others Tab:** Selected, showing a search bar and a '+ New Message-Only Extension' button.
  - Table:** Lists existing extensions. The first row, 'Announcements-Only E...', is highlighted with a red circle (2).
  - Direct Numbers Modal:** A pop-up window (5) is open over the selected extension, showing options for 'Extension Info', 'Direct Numbers', and 'Announcement'. The 'Direct Numbers' option is selected with a red circle (6).
  - Add Direct Number Modal:** A second pop-up window (7) is open, showing the 'Add Direct Number' form. It includes radio buttons for 'Local (Domestic)', 'Toll-Free', 'Vanity', and 'International'. Below these are dropdown menus for 'Select State/Province' and 'Select Area Code', and 'Next' and 'Cancel' buttons. A red circle (8) highlights the 'Next' button.

## Set an Announcement

Customize a greeting for an announcement-only extension.

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

The screenshot illustrates the RingCentral Admin Portal interface with numbered callouts (1-8) indicating the steps to set an announcement:

- 1**: The **Admin Portal** dropdown menu is highlighted in the top right corner.
- 2**: The **Phone System** tab is selected in the top navigation bar.
- 3**: The **Others** tab is selected in the sub-navigation bar.
- 4**: A table of extensions is shown, with one extension selected.
- 5**: The **Announcement** option is selected in the left-hand sidebar.
- 6**: The **Greeting** option is selected in the **Announcement Settings** pop-up window.
- 7**: The **Announcement Greeting** pop-up window is shown, with the **Default** option selected.
- 8**: The **Save** button is highlighted in the **Announcement Greeting** pop-up window.

## 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.

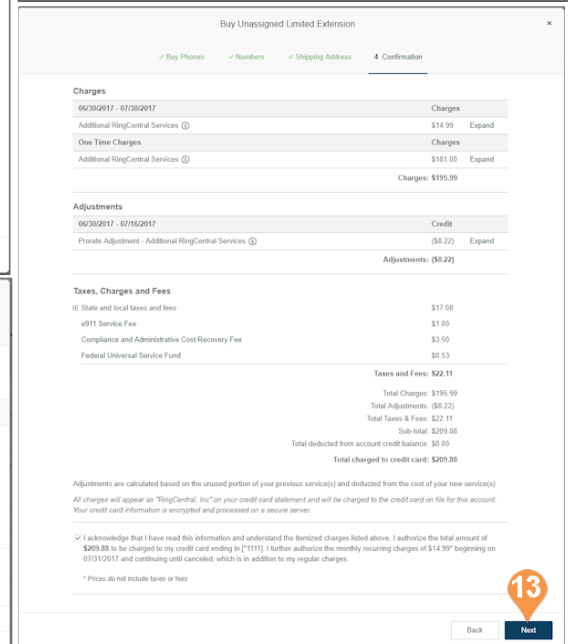
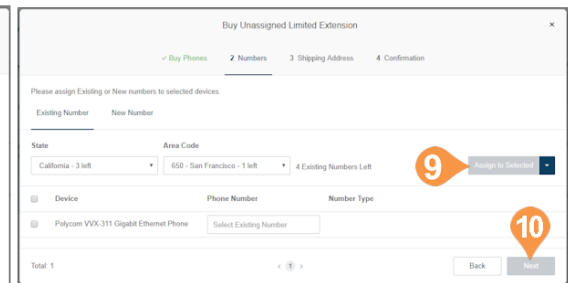
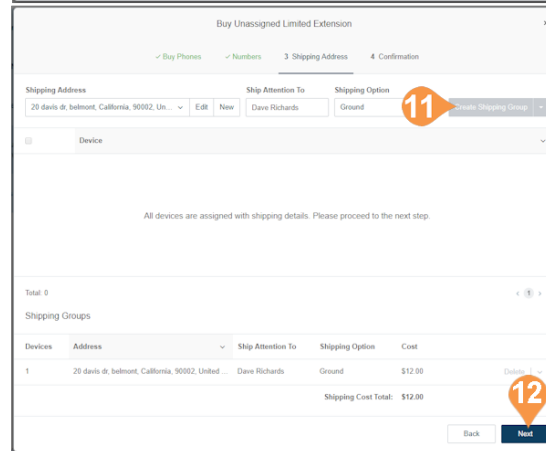
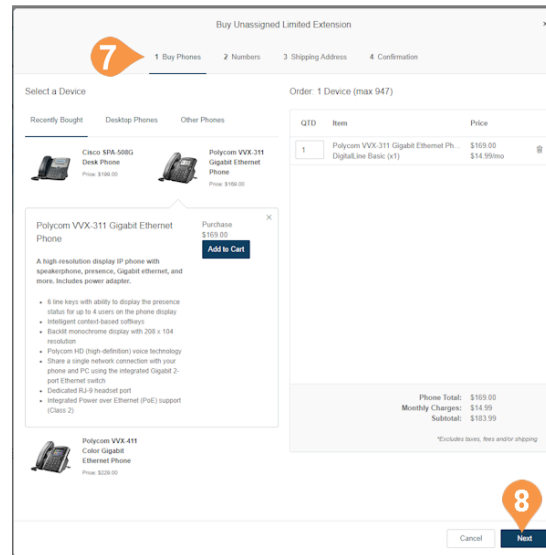
*continued on the next page...*

The screenshot illustrates the RingCentral Admin Portal interface. At the top, the 'Admin Portal' header shows the user's name and contact information. The navigation menu includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Groups' section in the sidebar is highlighted. The main content area shows the 'Others' tab selected, with a '+ New Limited Extension' button. A modal window titled 'Add Group' is open, displaying a list of extension types: Call Queue, Paging Only, Shared Lines, Park Location, Call Monitoring, Add Special Extension, Message-Only Extension, Announcement-Only Extension, and Limited Extension. The 'Limited Extension' option is selected, and the 'Next' button is highlighted.

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

An order summary is displayed.

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



## Assign a Limited Extension

To assign a limited extension and enter extension info:

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

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

RingCentral Admin Portal

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

Call Queues | Paging Only | Shared Lines | Park Locations | Call Monitoring | Others

Search [ ] Extension Type [ ] Status [ ] + New Message-Only Extension [ ]

Status	Type	Assigned Status	Name	Numbers	Ext.	Messages
Unassigned	Limited Extension	Unassigned		(480) 557-2228	0 / 0	Delete
Unassigned	Limited Extension	Unassigned		(480) 557-2229	0 / 0	Delete

RingCentral Admin Portal

Phone System | Users | Reports | Call Log | Billing

< Back Unassigned Limited Extension

Cisco SPA-122 ATA Phone Number: (480) 557-2228 Serial Number: N/A

Extension Info

Extension Number: 102 Extension Email: [ ]

Extension Name: [ ] International Calling:  International Calling allowed

Emergency Address: [ ]

Emergency Address: United States Edit Address

Delete Cancel Save & Enable



## 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 RingCentral Admin Portal interface for editing a Limited Extension. The top navigation bar includes the 'Admin Portal' dropdown, user information 'Dave | (850) 555-0012 Ext. 101', and 'Get Help | Log Out'. The 'Phone System' tab is selected, showing a navigation menu with 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The main content area displays a table of Limited Extensions. A modal window is open for the 'Break Room Ext. 110016' extension, showing the following fields and options:

- Extension Number:** 110016
- Extension Name:** Break Room
- Record Extension Name:** (dropdown menu)
- Company Name:** (text field)
- Contact Phone:** (text field)
- Email:** example@example.com
- International Calling allowed
- Regional Settings:** (dropdown menu)
- Resend Welcome Email:** (dropdown menu)
- Status:** Not Activated
- Buttons:** Delete Extension, Cancel, Save

# Phones and Devices

## Phones and Devices

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

### View and Edit Devices

To view and edit devices on your account:

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

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, user information (John | (650) 530-0164 Ext. 101), and links for 'Get Help' and 'Log Out'. Below this is a secondary navigation bar with tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. A left-hand navigation menu contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', and 'Phones & Devices' (which is highlighted). The main content area shows a 'User Phones' tab selected, with a search bar and filters for 'Status' and 'Device'. A table lists five devices with columns for Status, Device, Assigned, Phone Number, and Serial No. A '+ Add Device' button is located in the top right of the main content area. Numbered callouts indicate: 1. Admin Portal logo; 2. Phones & Devices menu item; 3. User Phones tab; 4. A device row in the 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 >

### Search Devices

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

### Add a Device

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

### Add a User Phone

To add a user phone:

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

Instructions continue on the next page.

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

The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is visible, along with user information 'Dave | (650) 555-0012 Ext. 101'. The 'Phone System' tab is selected in the top navigation bar. On the left sidebar, 'Phones & Devices' is highlighted. The main content area shows the 'User Phones' section with a '+ Add Device' button. Below this is a table of existing user phones. Overlaid on the screen are seven numbered callouts pointing to specific steps in the process:

- 1:** Points to the 'Admin Portal' dropdown.
- 2:** Points to the 'Phones & Devices' option in the left sidebar.
- 3:** Points to the '+ Add Device' button.
- 4:** Points to the 'User Phone' radio button in the 'Select Device Type' dialog.
- 5:** Points to the 'Assign to:' dropdown in the 'Select User and Location' dialog, which is set to 'Ext. 104 - Jen Williams'.
- 6:** Points to the 'Select Phone' dialog showing various desk phone models like 'Cisco SPA-303 Desk Phone'.
- 7:** Points to the 'Add Phone Number' dialog with the question 'Do you need a new phone number for this phone?' and 'Yes' selected.

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

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

**8 Name New Phone**

Selected phone: Cisco SPA-303 Desk Phone  
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://help.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 Softphone. 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

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
<b>One Time Charges</b>	<b>Charges</b>
Additional RingCentral Services	\$137.95 Expand
<b>Charges: \$557.83</b>	

**Adjustments**

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

**Taxes, Charges and Fees**

State and local taxes and fees	\$16.19
e911 Service Fee	\$8.00
Federal Universal Service Fund	\$25.88
Compliance and Administrative Cost Recovery Fee	\$24.00
<b>Taxes and Fees: \$73.84</b>	
<b>Total Charges: \$557.83</b>	
<b>Total Adjustments: (\$149.55)</b>	
<b>Total Taxes &amp; Fees: \$73.84</b>	
<b>Sub-total: \$482.12</b>	
<b>Total deducted from account credit balance: \$0.00</b>	
<b>Total charged to credit card: \$482.12</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 \$482.12 to be charged to my credit card ending in [\*1111]. 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 144. For more information on managing limited extensions and on enabling a limited extension for hot desking, see "Limited Extensions" on page 129.

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

The screenshot illustrates the steps for adding a hot desk phone in the RingCentral Admin Portal. The interface is divided into several sections:

- Admin Portal:** The top navigation bar includes the RingCentral logo, the user's name (Dave | (650) 555-0012 Ext. 101), and a 'Get Help | Log Out' link.
- Phone System Tab:** The 'Phone System' tab is selected, showing a navigation menu with 'Company Info', 'Phone Numbers', 'Auto-Receptionist', and '4 Group(s) 6 Other(s)'. The 'Phones & Devices' option is highlighted.
- Common Area Phones Tab:** The 'Common Area Phones' tab is selected, displaying a search bar, a 'Status' dropdown, a 'Type' dropdown, and a 'Device' dropdown. The 'Add Hot Desk Phone' button is visible.
- Type Dropdown:** The 'Type' dropdown is open, showing options for 'All', 'Hot Desk', and 'Limited Ext + Hot Desk'.
- Table of Devices:** A table lists existing devices with columns for Status, Type, Device, Existing P..., and Serial No.
 

Status	Type	Device	Existing P...	Serial No.
<input type="checkbox"/>	Hot Desk	Polycom VVX411	(240) 200-1009	64167F010BA8
<input type="checkbox"/>	Limited Ext + Hot Desk	Polycom VVX500	(209) 200-0680	0004F28133F3
- Buy Hot Desk Phone Modal:** A modal window titled 'Buy Hot Desk Phone' is open, showing a list of devices and a 'Purchase' button. The 'Next' button is highlighted.
 

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.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' header is visible with a user profile icon and contact information. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Paging Devices' sub-tab is selected. A '+ Add Device' button is highlighted with a red circle and the number 3. Below the navigation, a table lists existing paging devices, with one entry: 'Warehouse Paging Device'. Two modal windows are overlaid on the interface:

**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.*

Buttons: Cancel, Next

**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:

Buttons: Cancel, Next

**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

Button: Done

## 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 right, the user is logged in as 'Dave | (650) 555-0012 Ext. 101' with options 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', '5 Group(s) 3 Other(s)', and 'Phones & Devices'. The 'Shared Lines' tab is selected, showing a search bar for 'Search Shared Lines' and a 'Device' filter dropdown. Below the search bar, a dropdown menu for 'Shared Line' is open, with 'Phones Assigned' selected. The main content area shows a table with columns for 'Lines' and 'Extension', but it currently displays 'No results'. At the bottom, it shows 'Total: 0' and a pagination control set to 'Show: 25'.



## 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 a time. Repeat the process for different countries as needed

The screenshot illustrates the RingCentral Admin Portal interface for adding an unassigned phone. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information. The main navigation menu has tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Phone System' tab is active, and the 'Unassigned' sub-tab is selected. A sidebar on the left contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', and 'Phones & Devices'. The 'Unassigned' section shows a table with columns for 'Status', 'Device', 'Phone Number', and 'Serial No.'. A 'Buy unassigned phone' dialog box is open, showing a progress bar with four steps: 1. Location, 2. Buy phones, 3. Delivery address, and 4. Confirmation. The 'Select a location' step is active, with 'Domestic' selected. The 'Select a device' step shows a list of devices, including a 'Polycom VVX 101 Basic IP Phone' with a price of £79.00. The dialog box also displays a subtotal of £79.00 and a 'Next' button.

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?

**9** Shipping

Ship attention to:

Select Address:

Shipping Address:

City:

State/Province:

Zip 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.

**Confirm Order**

**Charges**

One Time Charges	Charges	
Additional RingCentral Services ⓘ	\$257.95	<input type="button" value="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 and authorize \$280.07 to be deducted from my Account Credit.

## Enabling Video Calls

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

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

### To enable video:

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

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

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

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the user is logged in as 'Dave' with the extension '(210) 555-0120 Ext. 101'. The navigation menu includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The left sidebar shows 'Company Info', 'Phone Numbers', 'Auto-Receptionist', and 'Phones & Devices' (highlighted with a '2').

The main content area shows the 'User Phones' tab. A table lists the phone details:

Status	Device	Assigned	Serial No.
	Dave Richards Polycom VVX-501 Col...	Dave Richards	N/A

The configuration modal for the 'Polycom VVX501' device is open, showing the following settings:

- Device:** Polycom VVX501
- Serial Number:** N/A
- Assigned Type:** User Phone
- Enable video calling**
- Status:** Order in Progress
- Name:** Dave Richards Polycom VVX-501 Color Touchscreen
- Expansion Modules:** 0
- Assigned To:** Dave Richards - Ext. 101
- Default Area Code:** 210
- Bandwidth Settings:** High
- Use HD Voice if possible**
- Emergency Address:** Edit Address

At the bottom right of the modal, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a '5'.

# Hot Desking

## Managing Hot Desking

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

### Types of Hot Desk Phones

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

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

### Phone Support and Setup

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

### Using Hot Desking for Limited Extension

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

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

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

### Managing Hot Desking Devices

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

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

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

## Enabling a Limited Extension Phone for Hot Desking

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

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

**Note:** On the **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](#)

Steve | (650) 458-4680 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. The main navigation menu shows 'Phone System' as the active tab. The left sidebar contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', '5 Group(s) 3 Other(s)', and 'Phones & Devices'. The 'Phones & Devices' section is expanded to show 'Unassigned' phones. A table lists six unassigned Cisco SPA-303 Desk Phones with their respective phone numbers and serial numbers. A 'Convert to Common Phone' button is visible for each phone. Below the table, a detailed view of a selected phone (Polycom VVX311) is shown, including its name, serial number, assigned type, and status. The 'Convert to Common Phone' button is highlighted, and a message indicates that the device has not been setup yet.

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

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 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 active, and the 'Common Area Phones' sub-tab is selected. A search bar and filters are visible. Below the search bar is a 'Logout' button. A table lists phone details with columns for 'Availability', 'Device', 'Name', 'Phone Number', and 'Serial No.'. A single phone entry is shown: 'Polycom VVX410' with phone number '(650) 446-5654'. A 'Check Progress' link is next to the entry. The bottom of the table shows 'Total: 1' and a 'Show: 25' dropdown.



## Set the Hot Desking Session Timeout

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

### No Timeout

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

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

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

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

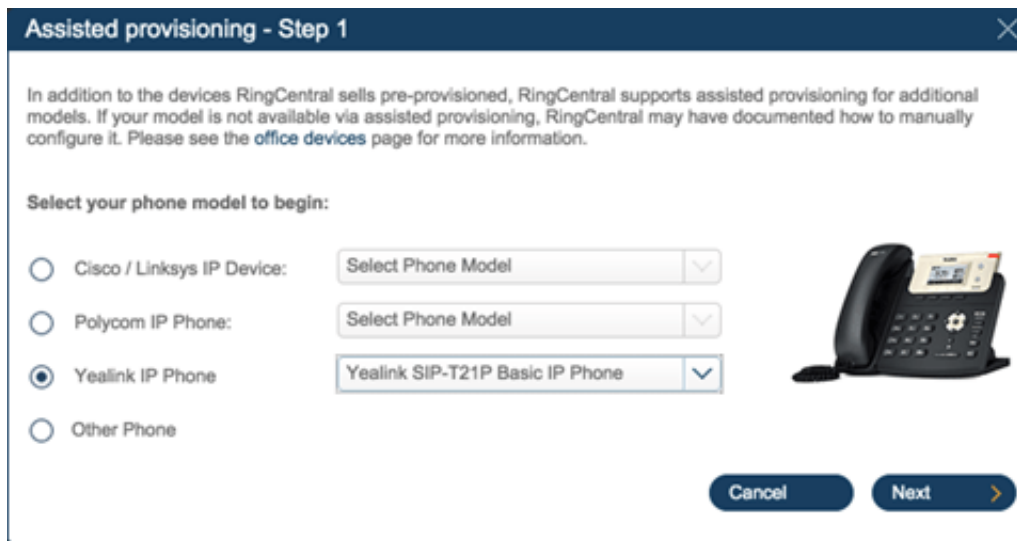
4. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the RingCentral logo is on the left, and navigation tabs for Phone System, Users, Reports, Call Log, Billing, and Tools are on the right. The Tools tab is selected, indicated by a red callout '1'. A dropdown menu is open under Tools, showing various settings options. 'Hot Desk Session Timeout' is highlighted with a red callout '2'. Below the menu, the 'Hot Desk Session Timeout' configuration panel is visible. It has a title bar and a section labeled 'Hot Desk user logout after' with a dropdown menu showing '12 hours', highlighted with a red callout '3'. At the bottom right of this panel is a 'Save' button, highlighted with a red callout '4'.

## 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: Select Phone Model

Polycom IP Phone: Select Phone Model

Yealink IP Phone: Yealink SIP-T21P Basic IP Phone

Other Phone

Cancel Next >

# 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 - Users

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 - Users

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 displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown and user information 'Dave | (650) 254-0170 Ext. 101' are visible. The navigation menu includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Users' tab is active, showing a table of 'Users With Extensions' and 'Unassigned Extensions'. A table lists users with columns for Status, Name, Number, Ext., Roles, and Messages. A 'New' user entry is highlighted with a callout '4' pointing to the 'Domestic' radio button.

A 'Add Users' pop-up window is open, showing a progress bar with steps: 1 Location, 2 Add Users, 3 Shipping Address, 4 Confirmation. The 'Add Users' step is active, and a callout '3' points to the 'Add Users' button. Below the progress bar, there are radio buttons for 'Domestic' (selected) and 'International'. A callout '5' points to the 'Next' button.

The 'Add Users With Phones' section is shown below, with a callout '6' pointing to the 'Add Users With Phones' tab. It includes an 'Account Status' section with details about the user plan and a table for adding users with phone devices. A callout '7' points to the 'Number of Users' input field in the table.

Number of Users	State	Area Code	Device
1	Select	Select	Select a Device... >

Number of Users	Area Code	Device	Phone Charges
2	530 - Quincy	(Edit) Polycom VVX-310 Gigabit Et...	\$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 shows the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', user information 'Dave | (650) 254-0170 Ext. 101', and 'Get Help | Log Out'. The main navigation tabs are 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Users' tab is active, showing a sidebar with 'User list', 'Roles', 'User groups', and 'Templates'. The main content area displays 'Users With Extensions' and 'Unassigned Extensions' sections. A table lists users with columns for Status, Name, Number, Ext., Roles, and Messages. A pop-up window titled 'Add Users' is open, showing a progress bar with steps: 1 Location, 2 Add Users, 3 Shipping Address, 4 Confirmation. The 'Add Users' step is selected, and the 'Add Users Without Phones' tab is active. The 'Account Status' section provides information about the user plan and setup. The 'Add' button is highlighted with a callout.

## 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 shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is highlighted with a red circle and the number '1'. Below it, the 'Users' tab is selected in the navigation menu. The main content area shows a table of users with columns for Status, Name, Number, Ext., Roles, and Messages. A red circle with the number '2' points to the 'Download User List' button in the top right corner of the user list area. Below the portal, a Microsoft Excel spreadsheet is open, displaying the downloaded user data. A red circle with the number '3' points to the Excel window. The spreadsheet has columns for Mailbox ID, First Name, Last Name, Roles, Email, Mobile Phone, Department, and Extension. The data includes users like Bob Miller, Debbie Smith, John Smith, and Sam Smith.

Mailbox ID	First Name	Last Name	Roles	Email	Mobile Phone	Department	Extension
62934108006	Bob	Miller	Manager	dave.richards@exa		Quality Assurance	104
62934108006	Bob	Miller	Manager	dave.richards@exa		Quality Assurance	104
62979221006	Debbie	Smith	User Admin	dave.richards@exa			105
62816311006	John	Smith	Super Admin	dave.richards@exa			150
62816311006	John	Smith	Super Admin	dave.richards@exa			150
62816311006	John	Smith	Super Admin	dave.richards@exa			150
62816311006	John	Smith	Super Admin	dave.richards@exa			150
62914834006	Sam	Smith	Standard (Internat	samsmith@gmail.c		Customer Service	103
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. It shows the 'Users' tab with a table of users and buttons for 'Download' and 'Edit User Information'. A dialog box guides the user through three steps: getting a template, filling it out, and uploading the file. A confirmation dialog asks for confirmation to overwrite current values. A spreadsheet template is also visible in the background.

Status	Name
✓	Donald Harrison
✗	George M...

**Instructions**

9 Allowed file format : xlsx, xls

11 If you do not wish to edit a particular user information, you can either leave the user 'as is' or remove the entire item from the list.

12 Extension numbers can be edited, but must be unique to each user.

**DO NOT**

15 - make changes to any of the columns highlighted grey

16 - change the order of columns

17 - delete any columns

18 - add any new columns

19 - update more than 1000 users at once

22 --- BEGINNING OF DATA ---

Mailbox ID	Extension	First Name	Last Name	RingCentral text to speech name	Contact Phone
DO NOT MODIFY	Required	Required	Required	Optional	Optional
X00000000315632031	101	Dave	Richards	Dave Richards	16505551212



## 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 for converting a virtual extension to a digital line in the RingCentral Admin Portal. It shows the 'Users' tab, a list of users, and the 'Phones & Numbers' section for a selected user. The 'Buy User Phone' wizard is also shown, with steps 6a and 6b highlighted.

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

**Step 2:** Select a user to convert with a direct inward dialing (DID) number but without a digital line.

**Step 3:** Click **Phones & Numbers**.

**Step 4:** Click **Phones**.

**Step 5:** Click **Add Phone**.

**Step 6a:** Select a phone for the user on the **Buy Phones** screen (this phone may be either a softphone or a physical phone).

**Step 6b:** Click **Existing Number** on the **Select Number** screen. Select the DID (number) from the user you are trying to convert.

**Step 6c:** Complete the wizard.

## 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 configuration process in the RingCentral Admin Portal. It shows the 'Users' tab selected, with a 'Call Handling & Forwarding' panel open for a user. The 'Call Forward for Unreachable Phone' pop-up is shown with the 'Call Redirection' slider turned on and the 'Other Number' option selected. The 'Phone Number' field is highlighted, and the 'Save' button is visible at the bottom right of the pop-up.

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

# 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](#).

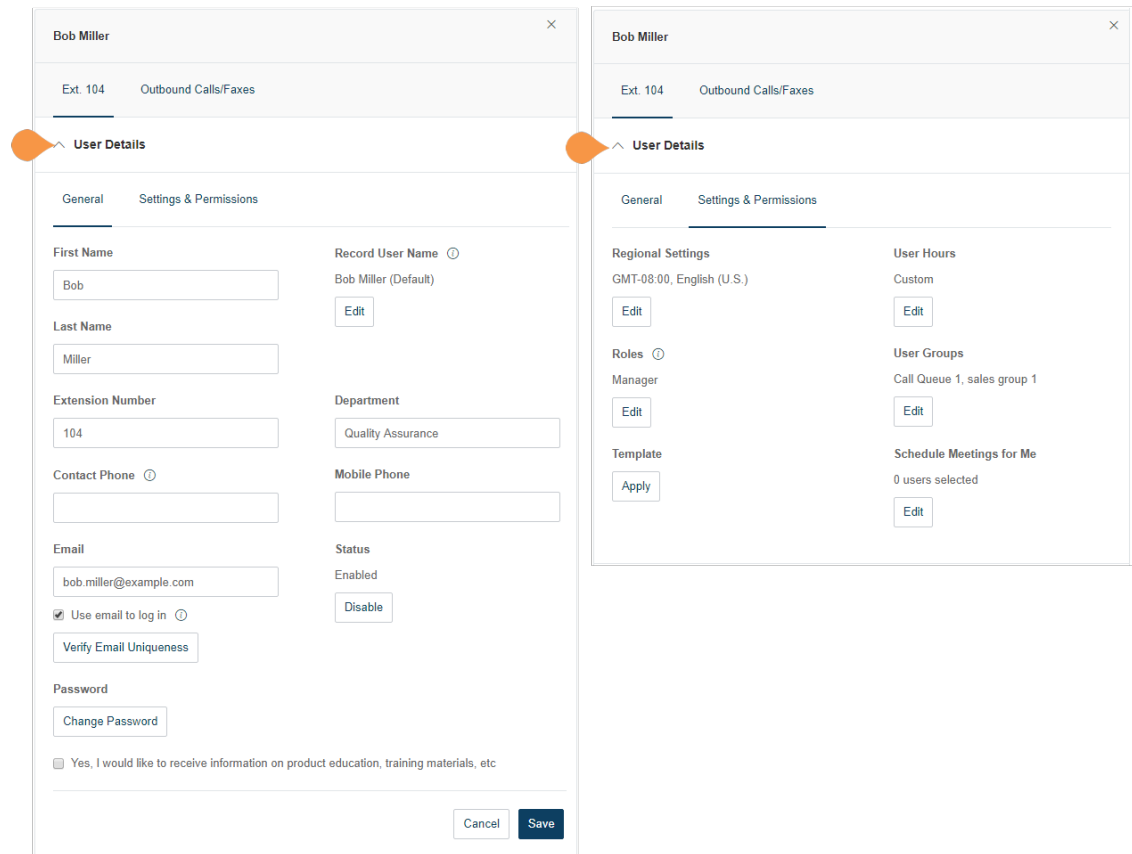
Administrators access and edit settings through the Users panel.

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

The screenshot shows the RingCentral Admin Portal interface. At the top, the RingCentral logo is on the left, and the user's name 'Dave | (650) 555-0012 Ext. 101' and 'Admin Portal' are on the right. Below the header, there are navigation tabs: 'Phone System', 'Users' (highlighted with a '1'), 'Reports', 'Call Log', 'Billing', and 'Tools'. A left sidebar contains 'User list' (highlighted with a '2'), 'Roles', 'User groups', and 'Templates'. The main content area is titled 'Users With Extensions' and 'Unassigned Extensions'. It features a search bar, filters for 'Status' and 'Roles', and a 'Department' dropdown. Below these are buttons for '+ Add User' and 'Download User List'. A table lists users with columns for 'Status' and 'Name'. The user 'Sam Smith' is selected, indicated by a checkmark and a '3'. To the right, a modal window shows the user's settings for 'Ext. 105' under the 'Outbound Calls/Faxes' category. The 'Caller ID' and 'Fax Settings' sections are highlighted with a '4'.

## User Details

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



## Phones & Numbers

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

**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.

The image displays two screenshots of the RingCentral Admin interface, specifically the 'Screening, Greeting & Hold Music' settings for a user. The interface is divided into three tabs: 'User Hours', 'After Hours', and 'Blocked Calls'.

**Left Screenshot (User Hours/After Hours):**

- User Greeting:** Includes an 'Enable' checkbox and a volume control slider.
- Connecting Message:** Includes an 'Enable' checkbox, a 'Custom' text field, and a volume control slider.
- Hold Music:** Includes an 'Enable' checkbox, a 'Music: Acoustic' selection, and a volume control slider.
- Call Screening:** Includes an 'Enable' checkbox and a volume control slider.
- Audio While Connecting:** Includes an 'Enable' checkbox, a 'Music: Acoustic' selection, and a volume control slider.

**Right Screenshot (Blocked Calls):**

- Block option:** A dropdown menu set to 'Specific calls and faxes'.
- Only block these numbers or area codes:** Includes input fields for 'Phone Numbers or Area Codes' and 'Name (Optional)', and an '+ Add' button.
- Callers will hear:** Includes a text message: "I'm sorry. The number you dialed can not be reached from your calling area. Goodbye." and a volume control slider.
- Block calls with no caller ID:** Includes a dropdown menu set to 'None'.
- Block calls from pay phones:** Includes a checked checkbox for 'Enable block calls from pay phones' and a volume control slider.



## Call Handling & Forwarding

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

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

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

## Messages and Notifications

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

### Call Handling & Forwarding

User Hours   After Hours   Advanced   Settings

Incoming Calls Forward in this Order

... Sequentially ⓘ   + Add Call Forwarding Phone ⋮

Create Ring Group   Ungroup

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

### Messages & Notifications

User Hours   After Hours   Settings

Take Messages

Enable

VoiceMail Greeting

Default

Message Recipient

Ext. 104, This extension

00:00 / 00:00

Select Extension

Edit

## 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**

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

**By Feature**

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

**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"/>	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"/>	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**.

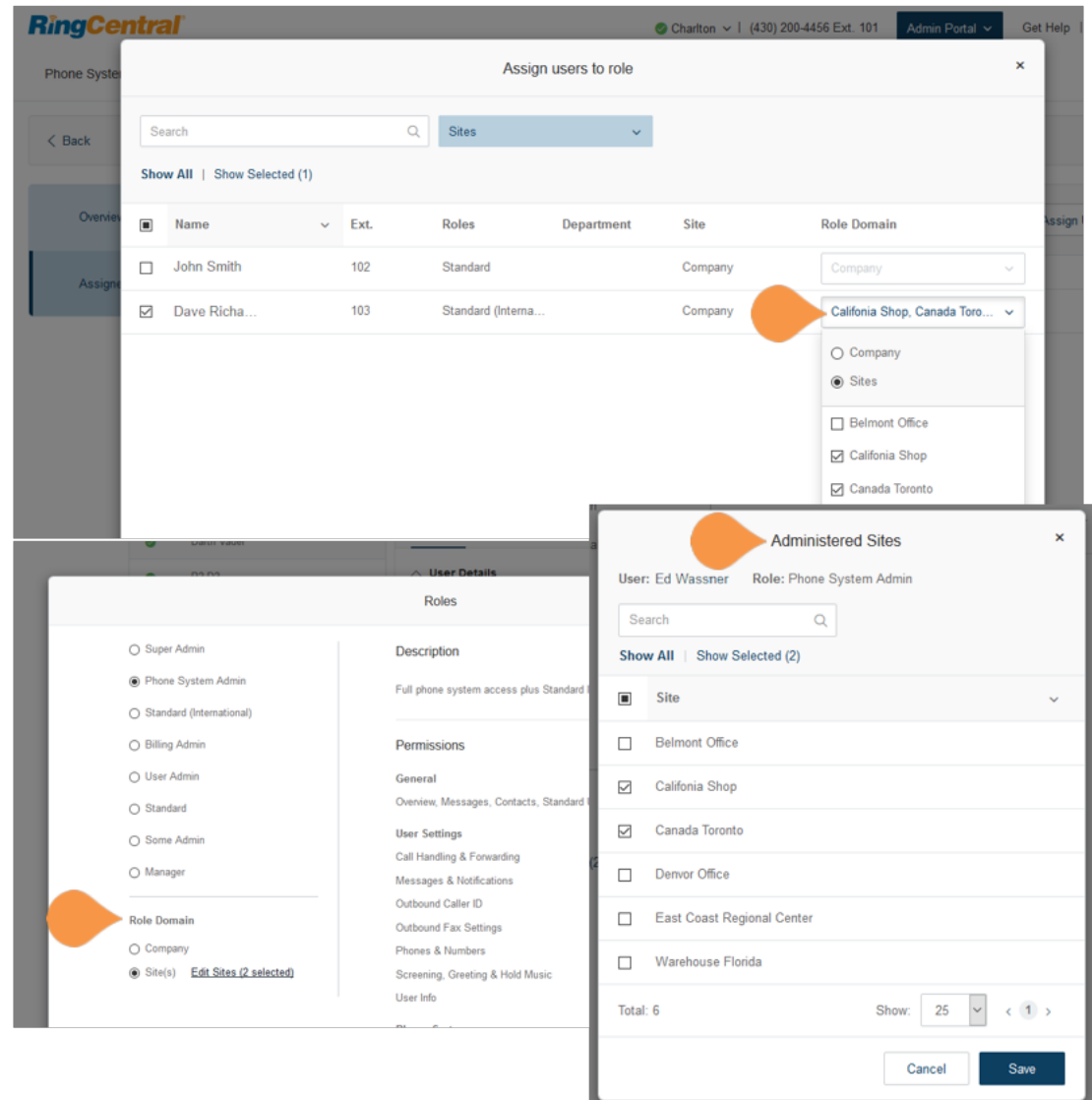
\*This feature is available for Office Premium and Ultimate only.

## 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.



## 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.

Roles give admins the ability to control what users can do within the system. A role is a collection of permissions which could be based on a job function. Standard International is assigned to new users by default.

Search Roles

Role Name	Type of Role	Description
Billing Admin	Predefined	Provide users with all capabilities of Standard (...)
Manager	Predefined	Provide users with all capabilities of Standard (...)
Phone System Admin	Predefined	Phone System Admin provides ability to modify...
Standard	Predefined	Provide users full access to all their settings & ...
Standard (International)	Predefined	Provide users full access to all their settings & ...
Super Admin	Predefined	Super Admin provides system administrator lev...
User Admin	Predefined	Provide users with all capabilities of Standard (...)

< Back Standard

Search  Department

Name	Number	Ext.	Department
Jen Williams		102	Sales

## 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, there is a navigation bar with the RingCentral logo on the left and an 'Admin Portal' dropdown on the right. Below this is a secondary navigation bar with tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Users' tab is selected and highlighted with a red circle '1'. On the left side, there is a sidebar menu with options for 'User list', 'Roles', and 'Templates'. The main content area is titled 'Users With Extensions' and 'Unassigned Extensions'. It features a search bar, a 'Status' dropdown, and a 'Roles' dropdown. Below these are buttons for '+ Add User' and 'Download User List'. A table lists users with columns for Status, Name, Number, Ext., and Roles. The table contains three rows: Bob Johnson, Charlie Wilson, and David Richards (Super Admin). The row for Charlie Wilson is highlighted with a red circle '2'. Below the table, a user details popup is shown for Charlie Wilson (Ext. 103). The popup has a 'Back' button and a title 'Charlie Wilson (Ext. 103)'. It contains a 'User Details' section with a yellow tooltip that says 'User Details: Change name, contact info, user hours, password.' The form fields include First Name (Charlie), Last Name (Wilson), Contact Phone, Mobile Phone, Email, Department (IT), and Roles (Phone System Admin). An 'Edit' button is located at the bottom right of the form, highlighted with a red circle '3'.

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	



## 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.

The screenshot shows the RingCentral Admin Portal interface. At the top, there's a navigation bar with 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Users' tab is selected. Below the navigation bar, there's a sidebar with 'User list', 'Roles', and 'Templates'. The 'Roles' panel is active. The main content area displays a table of roles with columns for 'Role Name', 'Type of Role', and 'Description'. A search bar and a '+ New Role' button are also present. Three orange callout boxes with numbers 1, 2, and 3 highlight the 'Users' tab, the 'Roles' sidebar item, and the '+ New Role' button respectively.

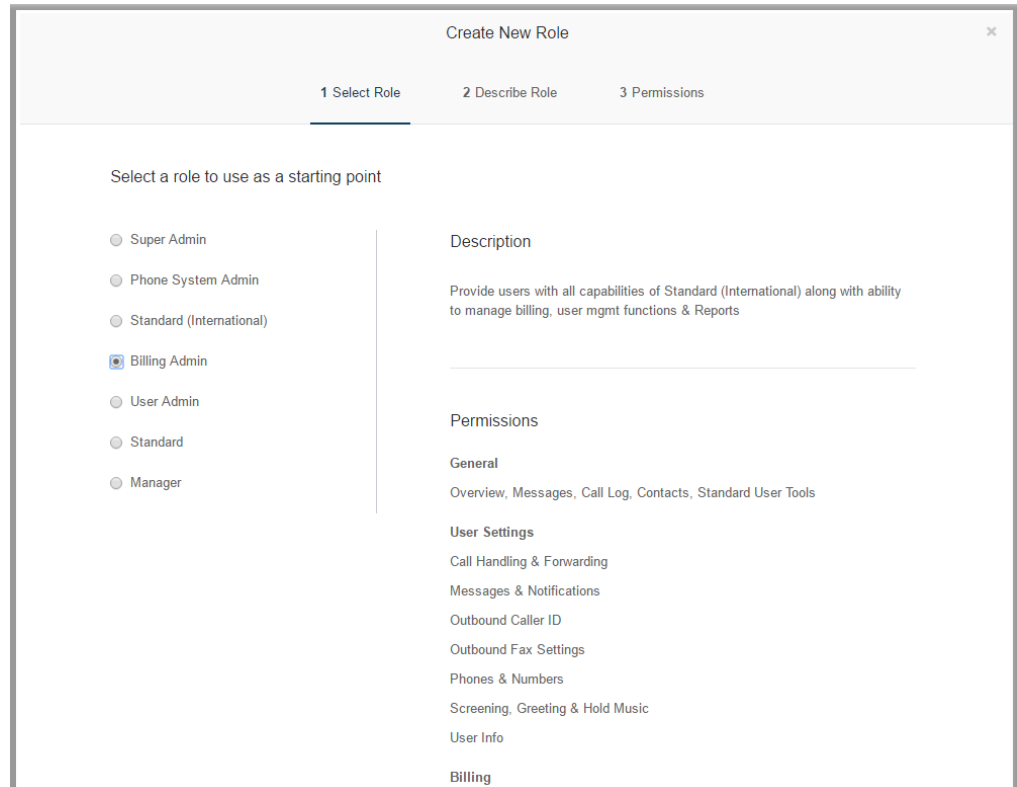
Role Name	Type of Role	Description
Billing Admin	Predefined	Provide users with all capabilities of Standard (...)
Manager	Predefined	Provide users with all capabilities of Standard (...)
Phone System Admin	Predefined	Phone System Admin provides ability to modify...
Standard	Predefined	Provide users full access to all their settings & ...
Standard (International)	Predefined	Provide users full access to all their settings & ...
Super Admin	Predefined	Super Admin provides system administrator lev...
User Admin	Predefined	Provide users with all capabilities of Standard (...)

### Step 1: Select Role

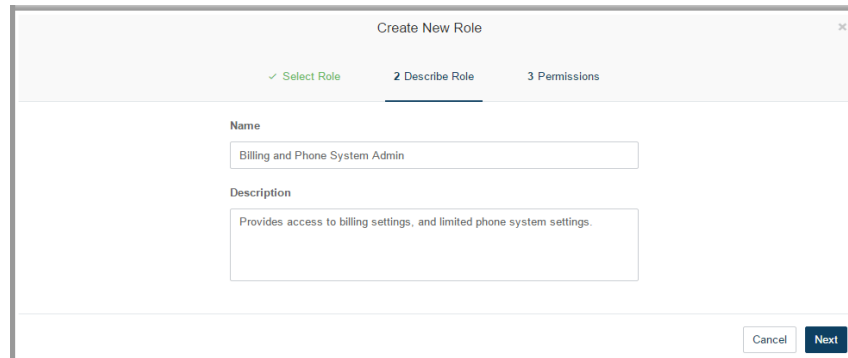
Select a role to use as a starting point. The permissions included in the starting role are displayed.

### Step 2: Describe Role

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



The screenshot shows the 'Create New Role' dialog box with three steps: 1 Select Role, 2 Describe Role, and 3 Permissions. Step 1 is active. On the left, a list of roles is shown with radio buttons: Super Admin, Phone System Admin, Standard (International), Billing Admin (selected), User Admin, Standard, and Manager. On the right, the 'Description' field contains the text: 'Provide users with all capabilities of Standard (International) along with ability to manage billing, user mgmt functions & Reports'. Below the description, the 'Permissions' section is expanded to show '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), and 'Billing'.

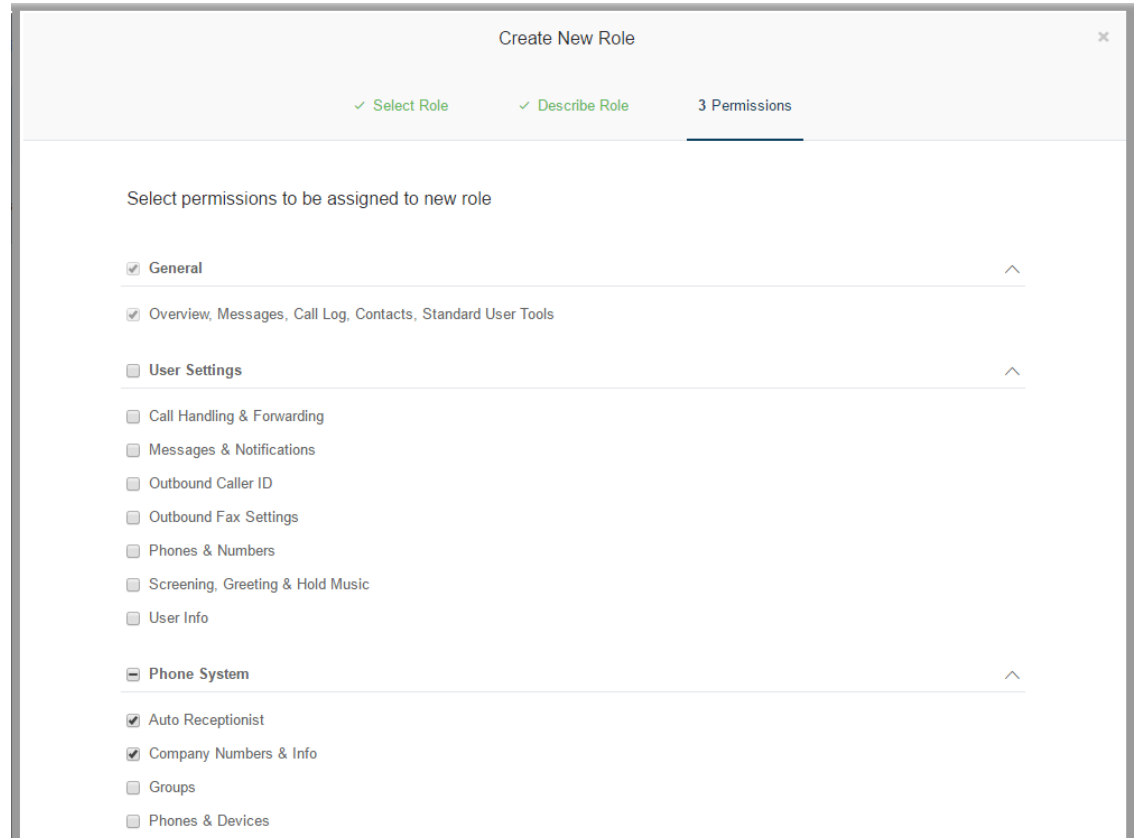


The screenshot shows the 'Create New Role' dialog box with three steps: 1 Select Role, 2 Describe Role, and 3 Permissions. Step 2 is active. The 'Name' field contains 'Billing and Phone System Admin' and the 'Description' field contains 'Provides access to billing settings, and limited phone system settings.' At the bottom right, there are 'Cancel' and 'Next' buttons.

### Step 3: Permissions

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

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



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 172.
2. From the Admin Portal, click **Users**.
3. Click **Roles**.
4. Select the custom role you created.
5. Click the check box, **Set as Default**.

The image consists of two screenshots from the RingCentral Admin Portal. The top screenshot shows the 'Roles' page, and the bottom screenshot shows the 'Company Default Role' configuration page.

**Top Screenshot: Roles Page**

The top screenshot shows the 'Roles' page in the Admin Portal. The left sidebar has a 'Roles' menu item highlighted with a red circle '3'. The main content area shows a table of roles. A red circle '4' points to the 'Company Default Role' row. The table has columns for 'Role Name', 'Type of Role', and 'Description'.

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.

**Bottom Screenshot: Company Default Role Configuration**

The bottom screenshot shows the 'Company Default Role' configuration page. A red circle '5' points to the 'Set as Default' checkbox, which is checked. The page shows the role name 'Company Default Role' and its description 'This custom role is assigned to all newly-created users.' Below this, there are sections for 'Permissions' and 'User Settings', both of which are expanded to show a list of permissions with checkboxes.

**Permissions:**

- 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

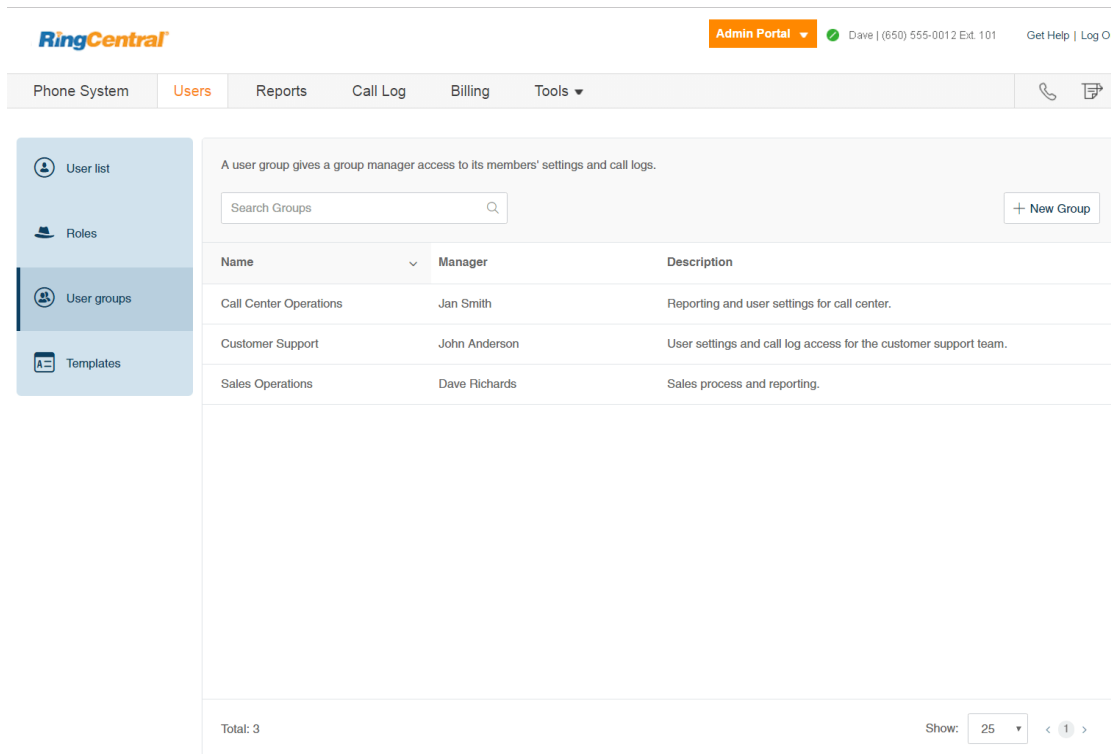
## Manage User Groups\*

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 is a navigation bar with the RingCentral logo, an 'Admin Portal' dropdown, and user information: 'Dave | (650) 555-0012 Ext. 101 | Get Help | Log Out'. Below this is a secondary navigation bar with tabs for 'Phone System', 'Users' (selected), 'Reports', 'Call Log', 'Billing', and 'Tools'. A left sidebar contains menu items: 'User list', 'Roles', 'User groups' (selected), and 'Templates'. The main content area displays a heading: 'A user group gives a group manager access to its members' settings and call logs.' Below this is a search box 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 'Show: 25' with navigation arrows.

## User Group Management Tasks

The tasks involved in managing user groups include:

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

## Create a User Group

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

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

*Instructions continue on the following page.*

The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' tab is selected, and the 'Users' tab is active. The 'User Groups' section is visible, showing a list of existing groups. A 'Create User Group' dialog box is open, with the 'Describe User Group' step selected. The 'Name' field contains 'Sales Operations' and the 'Description' field contains 'Sales process and reporting.' The 'Next' button is highlighted.

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.

6

✓ Describe User Group   **2 Add Members**   3 Select Group Manager

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

8

✓ Describe User Group   ✓ Add Members   **3 Select Group Manager**

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.

The screenshot illustrates the steps to edit a user group in the RingCentral Admin Portal. It is divided into three parts:

- Top Screenshot:** Shows the 'Admin Portal' header with the 'Users' tab selected. The 'User Groups' option in the left sidebar is highlighted with a '2'. A table lists user groups: 'Call Center Operations' (Manager: Jan Smith), 'Customer Support' (Manager: John Anderson), and 'Sales Operations' (Manager: Dave Richards). The 'Sales Operations' group is highlighted with a '3'.
- Middle Screenshot:** Shows the 'Sales Operations' group details page. The 'Edit' button in the top right corner is highlighted with a '4'.
- Bottom Screenshot:** Shows the 'Overview' page for the 'Sales Operations' group. The 'Save' button at the bottom right is highlighted with a '5'.

# 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 first screenshot shows the RingCentral Admin Portal interface. The 'Users' tab is selected, and the 'Templates' option is highlighted in the left sidebar. A red circle with the number '1' is placed over the 'Admin Portal' dropdown menu, and a red circle with the number '2' is placed over the 'Templates' option in the sidebar.

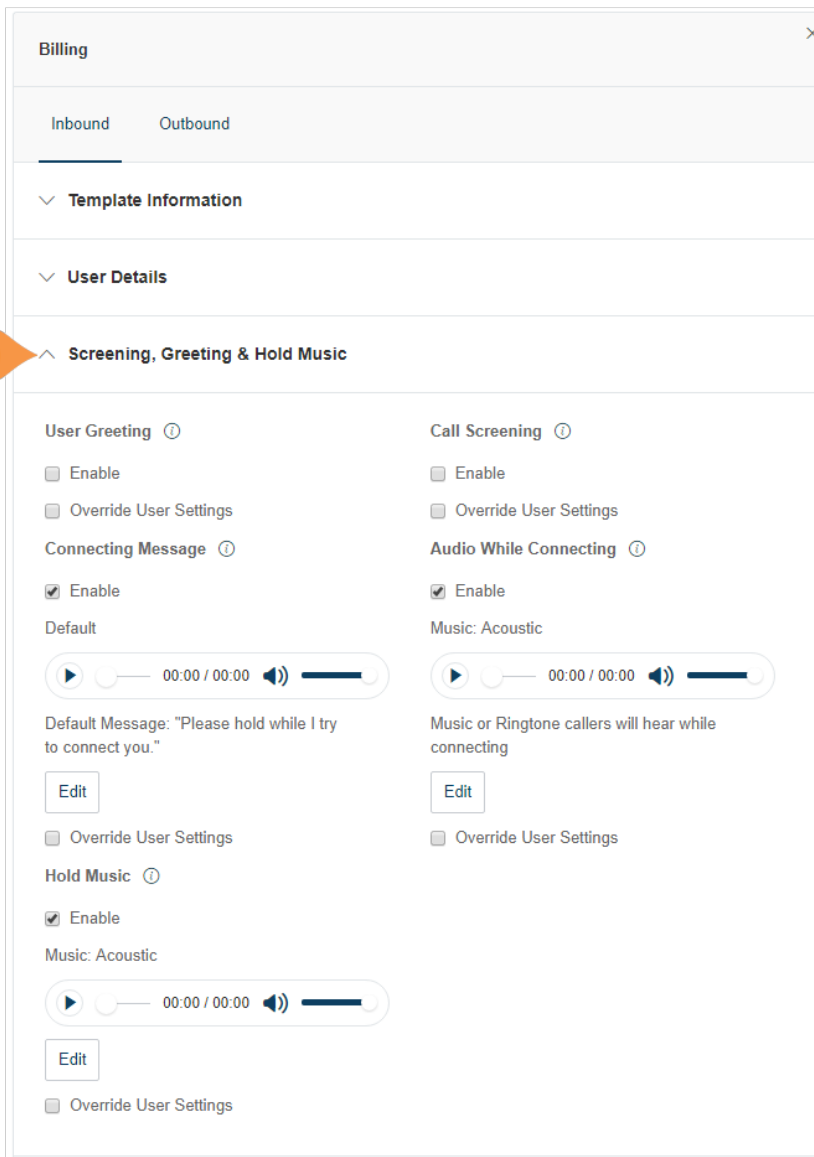
The second screenshot shows the 'Add User Settings Template' dialog box. The 'New Template Name' field is filled with 'Billing'. A red circle with the number '3' is placed over the '+ Add User Settings Template' button, a red circle with the number '4' is placed over the 'New Template Name' field, and a red circle with the number '5' is placed over the 'Save' button.

Name	Type	Last modified	Actions
FLOWERS INC	User Settings	09/26/2017	Copy   Apply   Delete
Halloween	Call Handling	09/22/2017	Copy   Apply   Delete
Lunch Time			
Bastille day			
Columbus Day			
Sample			
Customer Service			
Billing			
Business Dev Rep Template			

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.

The screenshot displays the 'Business Dev Rep Template' configuration interface. At the top, there is a search bar for 'User Templates' and a '+ Add User Settings Template' button. The main content area is divided into two panes. The left pane, labeled '6', shows a list of templates with 'Business Dev Rep Template' selected. The right pane, labeled '7', shows the configuration options for this template, grouped into 'Inbound' and 'Outbound' sections. The 'Template Information' section includes a 'New Template Name' field (containing 'Billing'), 'Last Modified' (09/14/2017 at 22:35 by John Smith), and 'Created' (09/07/2017 at 18:37 by John Smith) fields. The 'User Details' section, labeled '8', includes 'Regional Settings' (GMT-08:00, English (U.S.)), 'User Hours' (24 hours), 'Roles' (Standard (International)), and 'User Groups' (None). Each setting has an 'Edit' button and a checkbox for 'Override User Settings'. A 'Delete Template' button is located at the bottom left of the configuration panel.

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

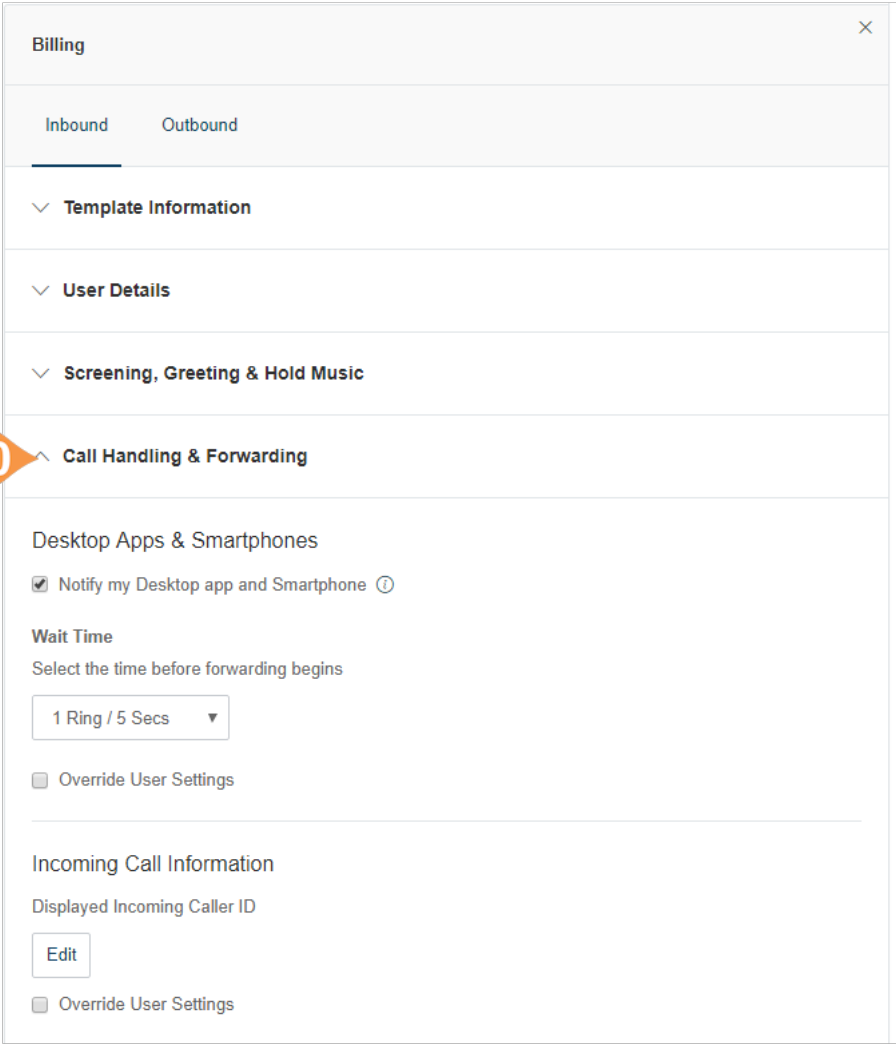
▼ **Template Information**

▼ **User Details**

9 ^ **Screening, Greeting & Hold Music**

<p><b>User Greeting</b> ⓘ</p> <p><input type="checkbox"/> Enable</p> <p><input type="checkbox"/> Override User Settings</p> <p><b>Connecting Message</b> ⓘ</p> <p><input checked="" type="checkbox"/> Enable</p> <p>Default</p> <p><span>▶</span> <span>00:00 / 00:00</span> <span>◀</span></p> <p>Default Message: "Please hold while I try to connect you."</p> <p><input type="button" value="Edit"/></p> <p><input type="checkbox"/> Override User Settings</p>	<p><b>Call Screening</b> ⓘ</p> <p><input type="checkbox"/> Enable</p> <p><input type="checkbox"/> Override User Settings</p> <p><b>Audio While Connecting</b> ⓘ</p> <p><input checked="" type="checkbox"/> Enable</p> <p>Music: Acoustic</p> <p><span>▶</span> <span>00:00 / 00:00</span> <span>◀</span></p> <p>Music or Ringtone callers will hear while connecting</p> <p><input type="button" value="Edit"/></p> <p><input type="checkbox"/> Override User Settings</p>	<p><b>Hold Music</b> ⓘ</p> <p><input checked="" type="checkbox"/> Enable</p> <p>Music: Acoustic</p> <p><span>▶</span> <span>00:00 / 00:00</span> <span>◀</span></p> <p><input type="button" value="Edit"/></p> <p><input type="checkbox"/> Override User Settings</p>
---	--	---

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**.



**Billing** ×

Inbound    Outbound

▼ **Template Information**

▼ **User Details**

▼ **Screening, Greeting & Hold Music**

**10** ▲ **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

---

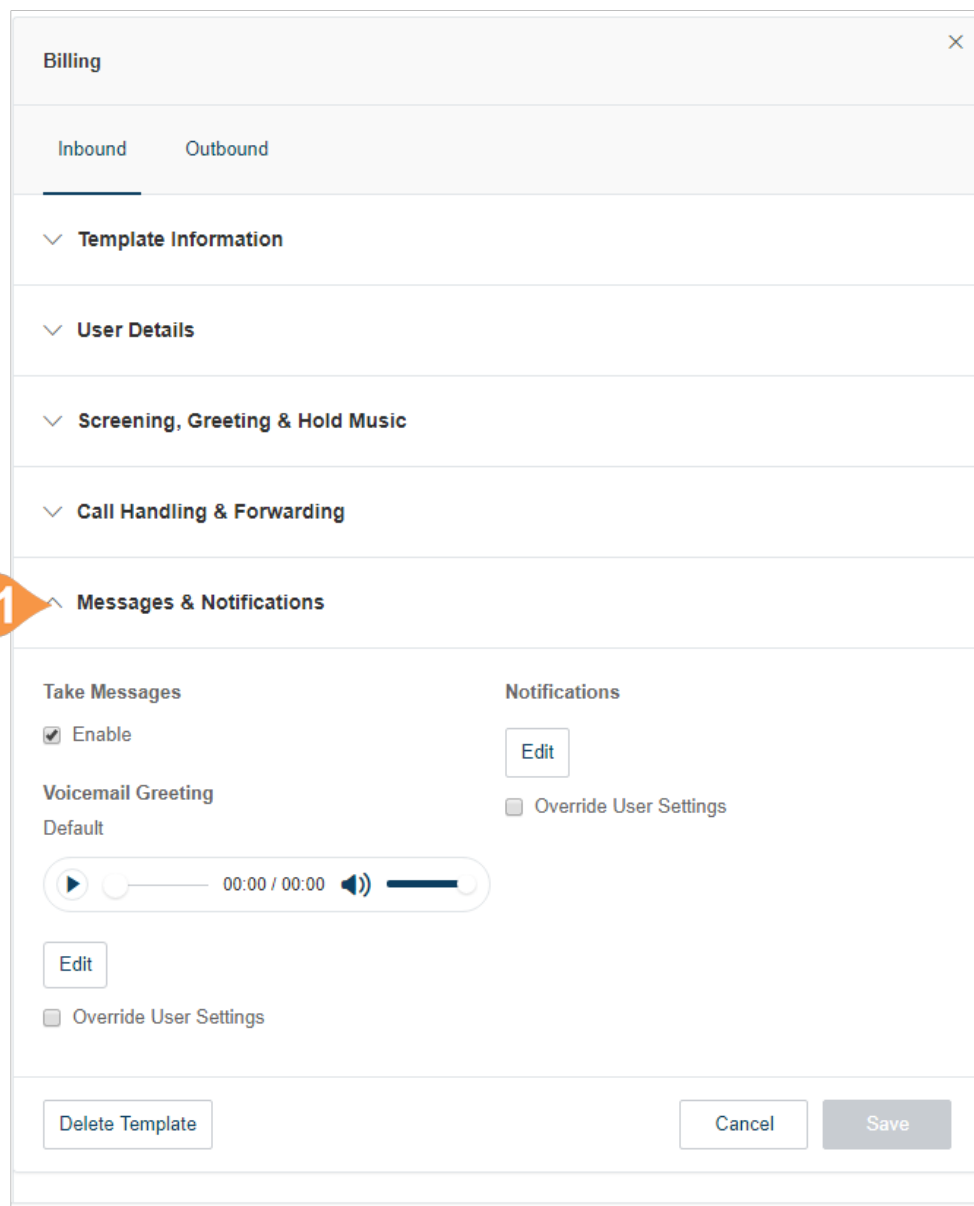
Incoming Call Information

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.



The screenshot shows a 'Billing' settings window with a close button (X) in the top right corner. The window is divided into two tabs: 'Inbound' (selected) and 'Outbound'. Below the tabs are several expandable sections: 'Template Information', 'User Details', 'Screening, Greeting & Hold Music', and 'Call Handling & Forwarding'. The 'Messages & Notifications' section is expanded and highlighted with a red callout bubble containing the number '11'. This section is divided into two columns: 'Take Messages' and 'Notifications'. In the 'Take Messages' column, there is a checked 'Enable' checkbox, a 'Voicemail Greeting' dropdown set to 'Default', a media player showing '00:00 / 00:00', an 'Edit' button, and an unchecked 'Override User Settings' checkbox. In the 'Notifications' column, there is an 'Edit' button and an unchecked 'Override User Settings' checkbox. At the bottom of the window, there are three buttons: 'Delete Template', 'Cancel', and '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	RingMe (Outgoing to Caller) (866) 200-8330 - Main Number
Edit	Edit
Call Flip (866) 200-8330 - Main Number	Fax Number (866) 200-8330 - Main Number
Edit	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

Street Address

Apartment / Suite #

City

State/Province

Zip Code

Fax Number

Cover Page

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 displays the RingCentral Admin Portal interface. At the top, the user is logged in as John with contact information (866) 200-8330 Ext. 150. The navigation menu includes Phone System, Users, Reports, Call Log, Billing, and Tools. The 'Users' tab is active, and the 'Templates' sub-tab is selected in the left sidebar.

The main content area shows a list of user templates. A modal window titled 'Add Call Handling Template' is open, showing the first step: '1 Name Template'. The user has entered 'Weekend schedule' as the 'New Template Name'. The 'Next' button is highlighted.

The second step, '2 Define Conditions', is shown below. The 'Caller ID' and 'Date and/or Time' conditions are both set to 'None'. The 'Next' button is highlighted.

The third step, '3 Define Call Handling', is shown below. The user has selected 'Take Messages Only' as the action. The 'Take Messages' checkbox is checked, and the 'Message Recipient' is set to 'This Extension'. A play button and a progress indicator are visible. The 'Save' button is highlighted.

## 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, user information (John | (866) 200-8330 Ext. 150), and the Admin Portal dropdown. The main navigation menu shows 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Users' tab is selected, and the 'Users With Extensions' section is active. A search bar and filters for 'Status' and 'Roles' are visible. A table lists users with columns for Status, Name, Number, Ext., Roles, Department, and Msg. Two users are listed: Bob Miller and Debbie Smith. The 'Apply Templates' button is highlighted with an orange callout. A modal window titled 'Select Template' is open, showing a search bar and a list of templates. The 'Billing' template is selected, and the 'Apply Template' button is highlighted with an orange callout.

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

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

# Reports

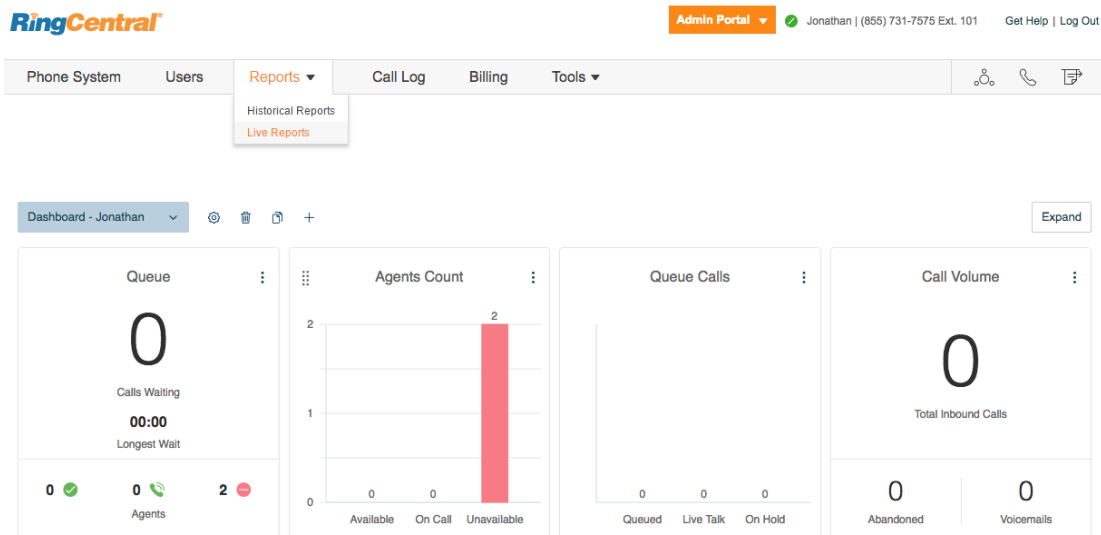
## Live Reports

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

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

For more information on using Live Reports, see:

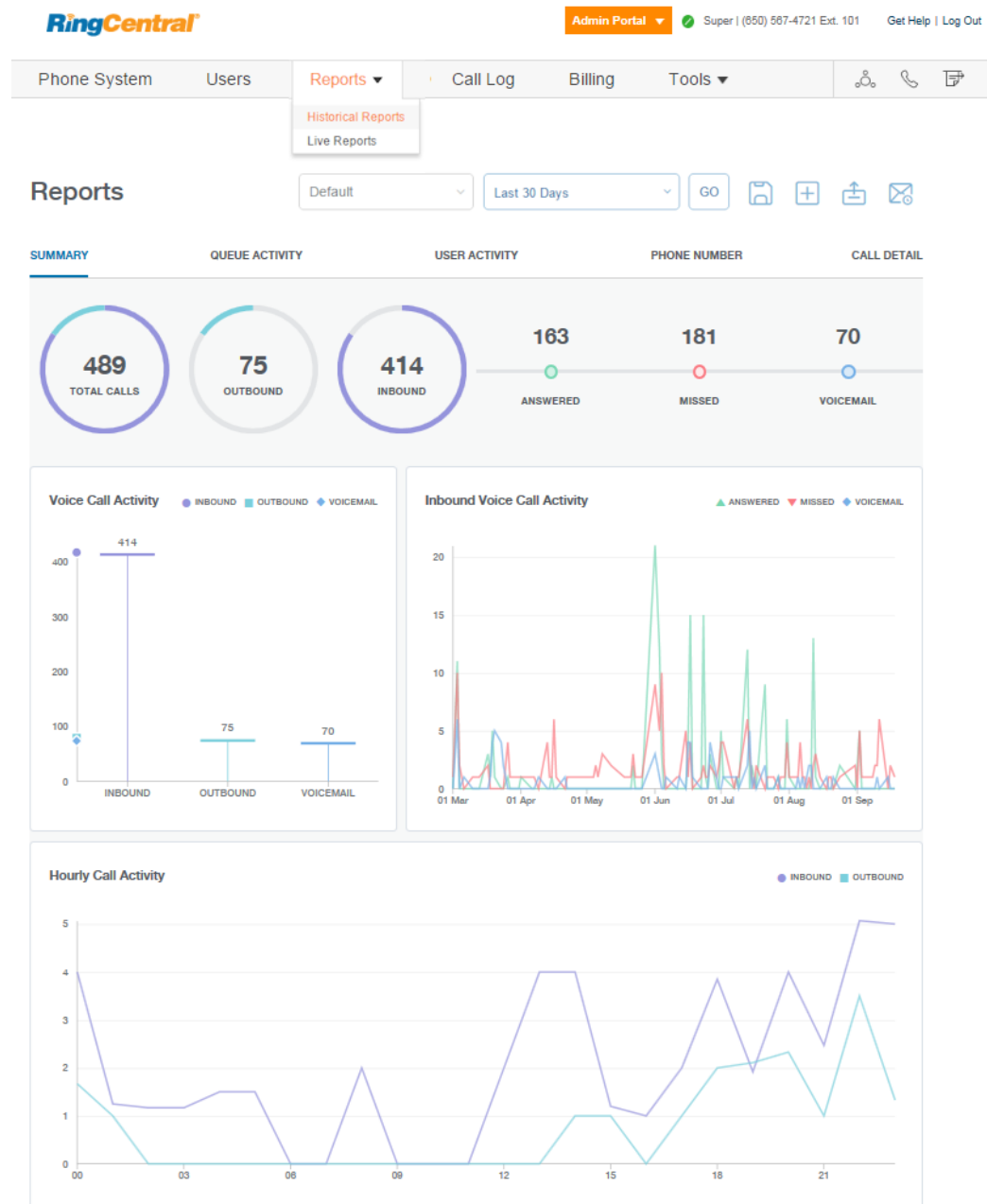
- [Live Reports User Guide](#)
- [RingCentral Live Reports: Overview](#)
- [Live Reports FAQ](#)



## Historical Reports

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

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



## Generate and Export Reports

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

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

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

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

(See more reports on the following page.)

User	Total	Inbound				Total Duration	Outbound		Avg. Calls/Day
		Total	Answered	Voicemail	Missed		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

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

**RingCentral** Admin Portal Super | (855) 567-4721 Ext. 101 Get Help | Log Out

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

Reports Default Last 30 Days GO

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

Filters User: Multiple Call Type: All

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

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

Users 10

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

1 - 2 of 2

**RingCentral** Admin Portal Super | (855) 567-4721 Ext. 101 Get Help | Log Out

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

Reports Default Last 30 Days GO

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

Filters Call Queue: All Dialed Number: 15502788926, 16505674721 Call Type: All Call Length: 12s - 12s

Avg. Time to Answer: 0s Avg. Duration: 0s

1 TOTAL CALLS 0 ANSWERED 1 MISSED 0 VOICEMAIL

Queue Activity 10

Queue Name	Answered	VoiceMail	Avg. Duration	Avg. Time to Answer
Customer Service	0	0	0s	0s

1 - 1 of 1

**RingCentral** Admin Portal Super | (855) 567-4721 Ext. 101 Get Help | Log Out

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

Reports Default Last 30 Days GO

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

Filters Dialed Number: Multiple

Calls details 10

Dialed Number	Total	Answered	Missed	VoiceMail	Avg. Calls/Day	Avg. Call Duration
16505674721	247	141	70	36	30.88	1m 32s
1831705247	5	4	0	1	0.63	20s
13086243934	12	4	8	0	1.5	53s

1 - 3 of 3

**RingCentral** Admin Portal Super | (855) 567-4721 Ext. 101 Get Help | Log Out

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

Reports Default Last 30 Days GO

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

Filters User: Elaine Tia Call Type: All

Call Detail 10

From	To	Call Start Time	Call Direction	Mailbox Name	Queue Name	Dialed Number	Call Duration	Call Result
16788842707	13086243934	06/04/2015 16:05:46	In	Elaine Tia		13086243934	6s	Not connected
14017093451	13086243934	05/04/2015 17:50:45	In	Elaine Tia		13086243934	6s	Not connected
12036600025	13086243934	05/06/2015 20:15:00	In	Elaine Tia		13086243934	6s	Not connected
16466637944	13086243934	08/24/2015 15:27:54	In	Elaine Tia		13086243934	0s	Not connected
16502783633	16502788920	07/02/2015 00:29:19	In	Elaine Tia		16502788920	36s	Voice Mail
14088213191	16505674721	06/04/2015 00:01:26	In	Elaine Tia		16505674721	24s	Not connected
19132259734	16502788920	05/13/2015 17:05:34	In	Elaine Tia		16502788920	0s	Not connected
15108301126	16502788920	04/07/2015 03:55:53	In	Elaine Tia		16502788920	12s	Not connected
14156936174	16502788920	04/13/2015 22:39:26	In	Elaine Tia		16502788920	12s	Not connected
16502823120	16505674721	04/16/2015 22:46:26	In	Elaine Tia		16505674721	36s	Not connected



# Call Log

## Call Log Description

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

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

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

Inbound Call

Outbound Call

Missed Call

Listen to a call recording

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

Click to mark as a bad call

Marked as a bad call

The screenshot shows the RingCentral Admin Portal interface for the Call Log. At the top, there is a navigation menu with 'Call Log' selected. The main content area displays a list of call records in a table format. The table has columns for Type, Phone Number, Name, Date / Time, Recording, Action, Result, and Length. Three call records are visible, all of which are VoIP calls that were connected. The interface also includes search filters for numbers, time period (Last 7 days), call direction, and types of call.

Type	Phone Number	Name	Date / Time	Recording	Action	Result	Length
	To: (650) 444-5567	Add Contact	Today 3:57 PM		VoIP Call	Call connected	0:00:05
	To: (650) 555-6678	Add Contact	Today 3:57 PM		VoIP Call	Call connected	0:00:10
	To: (650) 444-5567	Add Contact	Today 3:57 PM		VoIP Call	Call connected	0:00:10

# Billing

## Billing

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

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

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

### Service Plan

#### View or change your service plan

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

The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is highlighted with a red circle '1'. Below it, the 'Billing' tab is selected in the navigation bar, also marked with a red circle '1'. On the left sidebar, the 'Service Plan' menu item is highlighted with a red circle '2'. The main content area shows the 'Service Plan' details for 'RingCentral Office Enterprise 20 - 99 line'. The 'Change Edition' button is highlighted with a red circle '3'. Below it, the 'Change billing cycle' button is highlighted with a red circle '4'. Two pop-up windows are shown on the right: '3a. Change Edition' with an 'OK' button (circled '3b.') and '4a. Change Billing Cycle' with 'Monthly' selected as the 'Current Plan' and 'One Year Subscription' as the 'Recommended' plan. The 'Next' button is visible at the bottom of the second 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. At the top, the 'Admin Portal' dropdown is highlighted with callout 1. The 'Billing' tab is selected in the navigation bar with callout 2. The 'Service Plan' section is active, with 'Usage Info' highlighted by callout 3. The 'Billing History' section is expanded, showing a table of billing records with callouts 4a, 4b, 4c, and 4d. The 'Auto-Purchase' section is also expanded, showing options for calling credits and cost center codes with callouts 5a and 5b. The 'Cancel Service Plan' option is highlighted with callout 6a. Three pop-up windows are shown: 'Usage Info' (callout 3a), 'Billing History' (callout 4a), and 'Cancel Service Plan' (callout 6a).

**Usage Info (3a):**

- 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
- Additional Bundles:
  - Additional Toll-Free Minute Bundle: None Add
  - International Calling Credit Bundle: \$300.00 of international calling credit @ \$250.00/month, charged annually Change

**Billing History (4a):**

Date	Reference #	Description	Amount	View Statement
05/05/2015	9808149006	Additional Services	\$47.49	View Statement
04/22/2015	9758331006	Upgrade	\$64.48	View Statement
04/20/2015	9757539006	Upgrade	\$90.28	View Statement

**Cancel Service Plan (6a):**

Are you sure you want to cancel your RingCentral Office Enterprise 2 - 19 line Service Plan for (650) 555-0012?

If you cancel your service plan, your RingCentral account will be deleted and the following information will no longer be retrievable:

- All messages and faxes currently stored in your online account
- All Settings (Customized Greetings, Music on Hold, Answering Rules, Extensions, etc.)
- All of your Call Logs
- All of the entries in your RingCentral Contacts

In order to finalize your cancellation, please call (866) 733-0810 or (925) 231-320 outside of the United States for assistance in account verification and termination of your RingCentral service. Thank you for using RingCentral.

## 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 'Admin Portal', user information 'Dave | (650) 555-0012 Ext. 101', and 'Get Help | Log Out'. The main navigation tabs are 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Billing' tab is selected. On the left, a sidebar menu contains 'Service Plan', 'Payment Method', 'International Calling', 'Meetings', 'Device Orders', and 'Cost Center Management'. The 'Service Plan' section is expanded, showing details for 'RingCentral Office Enterprise 2 - 19 line', including billing plan, account credit, and various services. The 'Usage Info' section is highlighted, showing 'Active User Extensions' with a count of 10. Below this, the 'Active Virtual Extensions History' section is open, displaying a table of external calls for the period 03/04/2017 - 04/03/2017. The table lists extensions and the number of external calls. At the bottom, there is a 'Send' button to email the report.

Renewal Period	Extension	Name	Number of External Calls
03/04/2017 - 04/03/2017	Ext. 103	Ada Jarvis	2
	Ext. 14565	Simon Jones	8

Type	Direction	From	To	Extension	Forwarded To	Name	Date	Time	Action	Action Result	Result Description	Duration	Included	Purchased
Voice	Outgoing	(877) 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	-
Outgoing	Outgoing	103 - Ada Jarvis	(777) 777-7777	103 - Ada Jarvis	(555) 555-5555	Ada Jarvis	Mon-03/09/2017	4:34 PM	RingOut Web	Call connected	The call connected to and was accepted by this number.	0:00:45	-	-
Voice	Outgoing	(877) 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.	0:00:31	0	-
Outgoing	Outgoing	103 - Ada Jarvis	(777) 777-7777	103 - Ada Jarvis	(555) 555-5555	Ada Jarvis	Mon-03/09/2017	4:34 PM	RingOut Web	Call connected	The call connected to and was accepted by this number.	0:00:25	-	-
Outgoing	Outgoing	103 - Ada Jarvis	(555) 555-5555	103 - Ada Jarvis	(555) 555-5555	Ada Jarvis	Mon-03/09/2017	4:34 PM	RingOut Web	Call connected	The call connected to and was accepted by this number.	0:00:11	-	-

## 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 RingCentral logo is on the left, and the user's name 'Dave | (650) 555-0012 Ext. 101' and 'Get Help | Log Out' are on the right. Below the header is a navigation bar with tabs for 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing' (highlighted with a red circle 1), and 'Tools'. A left sidebar contains menu items: 'Service Plan', 'Payment Method' (highlighted with a red circle 2), 'International Calling', 'Meetings', 'Device Orders', and 'Cost Center Management'. The main content area shows the 'Payment Method' details for a Visa card, including card number, expiration date, and contact information. A red circle 3 points to the 'Edit Payment Method' button. An inset window shows the 'Edit Payment Method' form with red circle 4 pointing to the form fields. The form includes dropdown menus for Card Type, State/Province, and Country, and input fields for Card Number, Verification Code, Expiration Date, First Name, Last Name, Contact Phone, Contact Email, Address 1, and Address 2. At the bottom of the form are 'Cancel' and 'Save' buttons.

**Payment Method**

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**

**Payment Method**

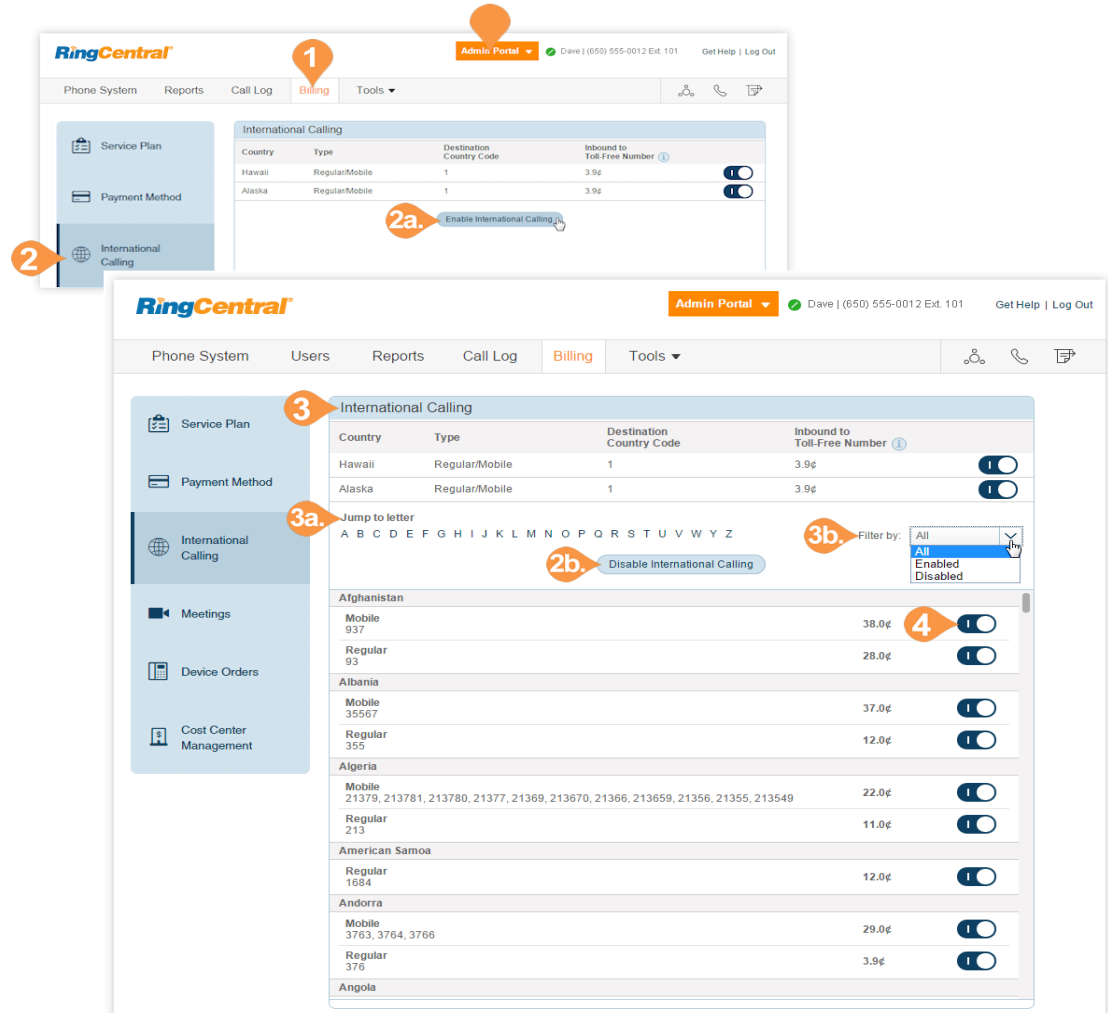
Card Type: Visa  
Card Number:  
Verification Code:  
Expiration Date: January 2017  
First Name: Dave  
Last Name: Richards  
Contact Phone: (650) 555-2009  
Contact Email: dave.richards@mycompany.com  
Address 1: 123 Main Street  
Address 2:  
City: San Mateo  
State/Province: California  
Zip/Postal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

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.





## Professional Services

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

Professional services include:

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

To view or add your professional services licenses:

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

For more information about professional services, see the [RingCentral Professional Services](#) datasheet.

The screenshot shows the RingCentral Admin Portal interface. At the top, the RingCentral logo is on the left, and user information (Chris | (210) 555-0120 Ext. 101) and navigation links (Admin Portal, Get Help, Log Out) are on the right. Below the logo is a navigation bar with tabs: Phone System, Users, Reports, Call Log, Billing (selected), and Tools. A left-hand sidebar contains a menu with items: Service Plan, Payment Method, International Calling, Professional Services (selected), Meetings, and Device Orders. The main content area is titled 'Professional Services' and contains a table with columns 'License Type' and 'Date Added'. The table lists three license types: 'Managed Services', 'Network Monitoring', and 'Extended Enterprise Support - Contact Center'. Each row has an 'Add' button. A modal window is open over the 'Extended Enterprise Support - Contact Center' row. The modal title is 'Add Extended Enterprise Support - Contact Center Licenses' and it has a close button (X). Below the title is a progress bar with three steps: '1 Add License' (active), '2 Confirm Order', and '3 Order Confirmation'. The modal contains a table with columns 'License' and 'Tier'. The 'License' column has the text 'Extended Enterprise Support - Contact Center'. The 'Tier' column has a dropdown menu open with the text 'Select a Tier' and options: Bronze, Silver, Gold, and Platinum. Below the table is a note: '\*Total charges do not include taxes, fees and prorates.' and a price of '\$0.00'. At the bottom of the modal are 'Cancel' and 'Next' buttons.

## Meetings

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

## Add Large Meeting Licenses

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

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

### Add a Large Meeting license

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

To remove licenses, call Customer Support.

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

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', user information 'Dave | (650) 555-0012 Ext. 101', and links for 'Get Help' and 'Log Out'. The main navigation menu has 'Billing' selected. On the left, the 'Meetings' option is highlighted. The main content area shows 'Large Meeting' licenses. A table lists existing licenses with columns for License Type, Assigned To, Ext., and Date Added. An 'Add Licenses' button is visible in the top right of the main content area. Numbered callouts 1 through 4 are placed over the Billing tab, Meetings menu item, Large Meetings sub-menu item, and the Add Licenses button respectively.

The screenshot shows a modal dialog titled 'Add Large Meeting Licenses'. It has a progress indicator with three steps: '1 Add License', '2 Confirm Order', and '3 Order Confirmation'. The main area contains a table with the following data:

License	Price	# of Licenses
Large Meeting 100 License	\$400.00 Annually	0
Large Meeting 200 License	\$900.00 Annually	0
License	Sub-total*	\$0.00

A note at the bottom states: '\*Total charges do not include taxes, fees and prorates.' A 'Next' button is highlighted with a numbered callout 6.

## 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.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', user information, and 'Get Help | Log Out'. The main navigation menu on the left has 'Meetings' selected. The 'RingCentral Webinar' tab is active, displaying a table of existing licenses. A modal window titled 'Add RingCentral Webinar Licenses' is open, showing a table with columns for 'License', 'Price', and '# of Licenses'. The modal includes a 'Sub-total\*' of \$0.00 and 'Cancel' and 'Next' buttons.

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>

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

## Add RingCentral Rooms Licenses

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

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

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

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

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

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

### Add a RingCentral Rooms license

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

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

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

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', user information, and 'Get Help | Log Out'. The main navigation menu has 'Billing' selected. The left sidebar shows 'Meetings' as the active section. The main content area displays a table of existing licenses with columns for License Type, Cost Center Code, and Date Added. A '+ Add Licenses' button is located in the top right corner of the table area.

License Type	Cost Center Code	Date Added
RingCentral Rooms	123456	07/08/2016
RingCentral Rooms	123456	07/08/2016
RingCentral Rooms	123456	07/08/2016
RingCentral Rooms	123456	07/08/2016

The screenshot shows the 'Add RingCentral Rooms Licenses' dialog box. It includes a status section with 'Licenses already added: 1' and 'Licenses number limit: 1000'. Below this is a form with 'Enter Number of Licenses' set to 1 and an 'Update Licenses' button. A summary table shows the recurring charges for 1 license at \$468.00 each.

Recurring Charges	Sub-Total
RingCentral Rooms Licenses 1 x \$468.00	\$468.00

## 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 displays the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, the user name 'Dave | (650) 555-0012 Ext. 101', and links for 'Get Help' and 'Log Out'. The main navigation tabs are 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing' (selected), and 'Tools'. The left sidebar contains a menu with 'Service Plan', 'Payment Method', 'International Calling', 'Meetings' (selected), 'Device Orders', and 'Cost Center Management'. The main content area shows the 'Room Connector' tab selected, displaying a table of existing licenses. A '+ Add Licenses' button is visible in the top right of the table area. The table lists four existing licenses, all of type 'Room Connector' with cost center code '123456' and date added '07/08/2016'. A modal window titled 'Add RingCentral Rooms Licenses' is open, showing the 'RingCentral Rooms Licenses Status' section with 'Licenses already added: 1' and 'Licenses number limit: 1000'. Below this, there is a text input field for 'Enter Number of Licenses' with the value '1' and an 'Update Licenses' button. The 'Recurring Charges' section shows 'RingCentral Rooms Licenses' for '1 x \$468.00' with a 'Sub-total' of '\$468.00'. At the bottom of the modal, there are 'Cancel' and 'Next' buttons.

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

Recurring Charges	Sub-total
RingCentral Rooms Licenses	\$468.00
1 x \$468.00	\$468.00

## 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**.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing' (highlighted with a '1'), and 'Tools'. The user is logged in as 'John | (650) 530-0164 Ext. 101'. The left sidebar contains 'Service Plan', 'Payment Method', 'International Calling', 'Meetings', 'Device Orders' (highlighted with a '2'), and 'Cost Center Management'. The main content area shows a search for orders from 'Past 6 months' and a table of orders. One order is highlighted with a '3' and an 'Edit Order' button. The 'Edit Order: 418008' modal is open, showing a progress bar with steps: '1. Edit Phone', '2. Update Shipping', '3. Review and Submit', and '4. Order Confirmation'. The modal contains a note: 'Please note: Only phone type and shipping can be modified for an existing order. To make any other changes, please call support (888) 896-4591.' It displays 'Original Order' and 'Order Changes' tables. The 'Original Order' table shows 4 Polycom VVX-310 Gigabit Ethernet Phones for \$836.00. The 'Order Changes' table shows 2 Polycom VVX-310 Gigabit Ethernet Phones for a credit of \$418.00 and 2 Yealink W52P with 2 Handsets for \$678.00. A summary table at the bottom shows 'Original Phone Order Charges' with a total paid of \$857.55 and 'Phone Order Charges/Credits' with a new sub-total of \$0.00. A 'Next' button is highlighted with a '6'.

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

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			Phone Order Charges/Credits (1)		
One Time Charges	Quantity	Sub-total*	One Time Charges/Credits	Quantity	Sub-total*
Phones	4	\$836.00	New Phones	2	\$678.00
Shipping Fees		\$21.55	Credits from Original Order	(2)	(\$418.00)
Recurring Charges			Recurring Charges/Credits		
Phone Rental	0	\$0.00	New Phone Rental	0	\$0.00
			Rental Credits from Original Order	(0)	(\$0.00)
<b>Total Paid*:</b>		<b>\$857.55</b>	<b>New Sub-total Charges/Credits*:</b>		<b>\$0.00</b>

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



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

The screenshot displays the 'Update Shipping for Order 418008' window. It features a table of shipping groups with columns for Quantity, Destination, Shipping Method, and actions like 'View', 'Change Shipping', and 'Delete'. Below this is a section for 'Original Phone Order Charges' and 'Phone Order Charges/Credits' with sub-totals. A 'Next' button is highlighted with a red circle 8.

The 'Review and Submit' window shows a summary of charges:
 

One Time Charges	Charges
Additional RingCentral Services	\$598.42
<b>Charges: \$598.42</b>	

One Time Charges	Credit
Credit - Additional RingCentral Services	(\$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>	

 A red circle 10 is next to the acknowledgment checkbox, and a red circle 11 is next to the 'Next' button. A notification box on the right states: '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.' with 'Cancel' and 'OK' buttons. A red circle 12 is next to the notification box.

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 shows the RingCentral Admin Portal interface. The top navigation bar includes 'Admin Portal', 'Test Order | (877) 633-0003 Ext. 101', and 'Get Help | Log Out'. The main navigation menu has 'Phone System', 'User Management', 'Call Log', 'Billing' (highlighted), and 'Tools'. A left sidebar contains 'Service Plan', 'Payment Method', 'International Calling', 'Meetings', and 'Device Orders' (highlighted). The main content area features a search bar for orders from the 'Past 6 months'. Below is a table with the following data:

Order Number	Order Placed	Device Quantity	Status	
418008	01/08/2016 5:28 AM	4	Submitted	<a href="#">View Order</a>

This screenshot shows the 'Order Details' section for package ID 419008. The interface is identical to the previous screenshot, but the 'Order Details' section is expanded. It displays the following information:

- Package ID:** 419008
- Request Number:** -1
- Number of Device:** 2
- Status:** Submitted
- Shipping Speed:** GROUND
- Tracking Number:**
- Shipping Address:** 1400 Fashion Island Blvd, Ste 700, San Mateo, 94404-2073

There is also a link to 'View Device List' for this package.

## 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.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown is highlighted with a callout '1'. The 'Billing' tab is selected in the top navigation bar. In the left sidebar, 'Cost Center Management' is highlighted with a callout '2'. The main content area shows a list of cost center codes: 'Customer Service', 'Sales', 'Shipping', and 'Warehouse'. 'Customer Service' is selected with a callout '3'. A 'Code Info' modal window is open, showing fields for 'Name' (Customer Service), 'Billing Code (optional)' (200), and 'Parent Cost Center Code' (Main). A callout '4' points to the 'Code Info' header. Below the modal, the 'Recurring Billing Items' section is visible. A callout '5' points to the 'Recurring Billing Items' header in a separate modal window, which shows a 'Recurring Total' of '\$0.00 monthly' and tabs for 'Bundled Items' and 'Additional Items'. A callout '6' points to the 'Done' button at the bottom right of this modal. At the bottom of the main content area, there are buttons for 'Update All Billing Items' and 'Add Cost Center Code'.

## 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 illustrates the RingCentral Admin Portal interface for Cost Center Management. The main page shows a list of Cost Center Codes under the heading "You have 5 Cost Center Codes." The list includes Main Company, Main, Secondary, Customer Service, Sales, Shipping, and Warehouse. Two modal windows are open:

- Update Items:** This modal displays a progress indicator for 4 items. It includes a "Download" button to get a template, an "or Email:" field with an "Add one Email address" button and a "Send" button, and an "Upload File" section with a "Browse" button and an "Upload" button. A "Cancel" button is at the bottom right.
- Add New Cost Center Code:** This modal has an "Enter Name:" field with "Training" entered, a "Billing Code (optional):" field with "600" entered, and a "Select Parent Cost Center Code:" dropdown menu. The dropdown is open, showing "Main" selected, with other options like "Customer Service", "Sales", "Shipping", and "Warehouse". A "Save" button is at the bottom right, and a "Cancel" button is at the bottom left.

Numbered callouts (1-5c) indicate the steps described in the text: 1 points to the Admin Portal tab; 2 points to the Cost Center Management link in the left sidebar; 3 points to the Cost Center Management page header; 4a, 4b, and 4c point to the Download, Fill Out Template, and Upload File steps in the Update Items modal; 5a, 5b, and 5c point to the Enter Name, Select Parent Cost Center Code, and Save steps in the Add New Cost Center Code modal.

## 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.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes the RingCentral logo, an 'Admin Portal' dropdown, and user information: 'Dave | (650) 555-0012 Ext. 101 | Get Help | Log Out'. The main navigation tabs are 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Billing' tab is selected. On the left sidebar, the 'CloudConnect' menu item is highlighted. The main content area displays a table titled 'CloudConnect' with the following data:

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

At the bottom of the page, it shows 'Total: 0' and a 'Show: 25' dropdown menu.

## Live Reports

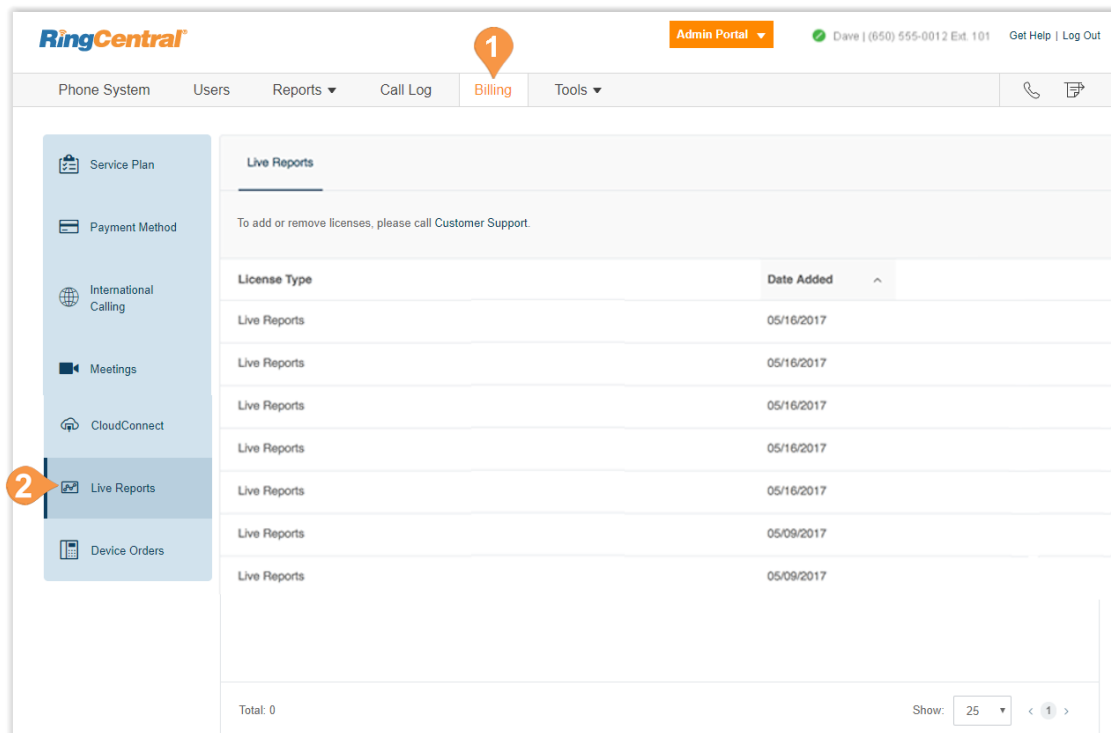
Live Reports provides access for users to build dashboards and reports to show data on inbound and outbound calls in close to real time.

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.



The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing' (highlighted with an orange circle and the number 1), and 'Tools'. The 'Billing' section is expanded, showing a sidebar with options: Service Plan, Payment Method, International Calling, Meetings, CloudConnect, Live Reports (highlighted with an orange circle and the number 2), and Device Orders. The main content area is titled 'Live Reports' and contains a message: 'To add or remove licenses, please call Customer Support.' Below this is a table with columns 'License Type' and 'Date Added'. The table lists several 'Live Reports' licenses added on 05/16/2017 and 05/09/2017. At the bottom, it shows 'Total: 0' and a pagination control 'Show: 25 < 1 >'.

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



# Tools



## Tools

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

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

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

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

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

**Session Timeout** lets you configure a session timeout for all users. To learn more about this, see "[Session Timeout](#)" on page 223

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

1 Not available for one-line accounts.

2 Active Directory available for Office Premium and Ultimate users only

3 Available for US users only

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

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

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

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

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

## Archiver

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

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

### Configure RingCentral Archiver

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

RingCentral Archiver will run the job on an hourly basis and archive to Dropbox or SFTP all of the extensions' call recordings generated within the hour before last Archiver job run.

6. Select the types of **Data to backup**. By default, Call Recordings are backed up for admins and users. Users can select for their own extensions whether to backup Call Recordings, Voice Mails, SMS and/or Fax.

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

The image shows two screenshots of the RingCentral Admin Portal interface. The top screenshot shows the 'Tools' dropdown menu with 'Archiver' selected, indicated by a red circle '2'. The bottom screenshot shows the 'Accounts' tab with 'Dropbox', 'SFTP', and 'Google Drive' listed, each with a 'CONNECT' button. A red circle '3' points to the 'Select Account To Connect' section. The bottom screenshot also shows the 'Sync Options' tab with 'Data to backup' set to 'Call Recordings' (indicated by a red circle '6') and the 'Enable Backup' toggle switch turned on (indicated by a red circle '5').

## 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.

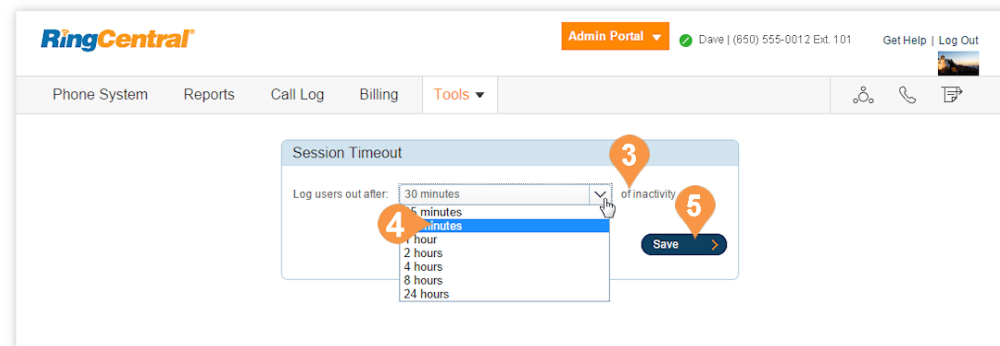
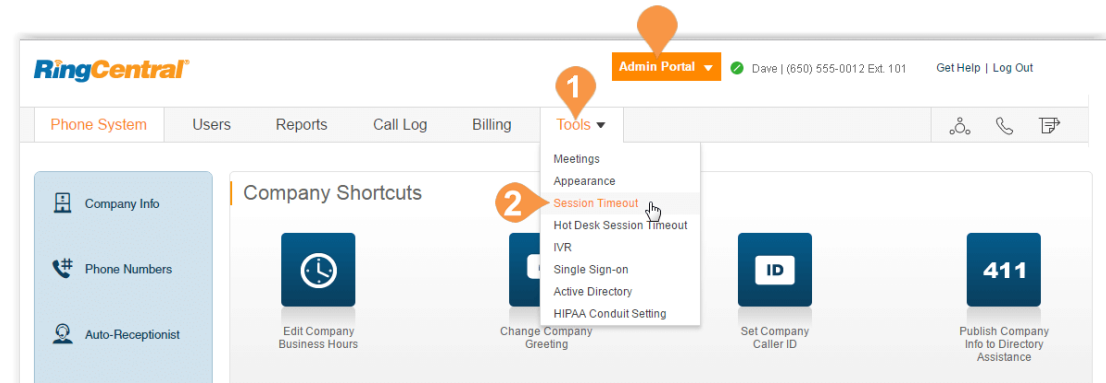
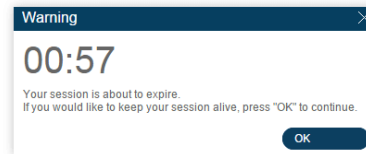
The image displays three sequential screenshots of the RingCentral Admin Portal interface, illustrating the process of adding a company logo and linking it to a website. The interface includes a top navigation bar with the RingCentral logo, user information (Dave | (650) 555-0012 Ext. 101), and links for Get Help and Log Out. A secondary navigation bar contains tabs for Phone System, Users, Reports, Call Log, Billing, and Tools. The Tools dropdown menu is expanded in the first screenshot, highlighting the Appearance option. The second screenshot shows the 'Add a logo to your RingCentral Service Site' form, which includes an 'Upload a logo' section with a 'Browse' button and an 'Attach' button, and a 'Set URL to load when user clicks on logo' section with a text input field for the URL. The final screenshot shows the completed form with the 'Submit' button highlighted.

## 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.

User ID	Company Name	Federated Name	Number	Linked Date	Exts Duplicating with current account
400153147006	RINGCENTRAL	AcctFed01	+12106724724	05/15/2017	No
400162283006	RINGCENTRAL	AcctFed02	+12106724141	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.

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

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

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

\*Available for Premium and Ultimate users only.

The screenshot shows the RingCentral Admin Portal interface. At the top, the user is logged in as Dave | (650) 555-0012 Ext. 101. The 'Tools' menu is open, and 'Single Sign-on' is selected. The main content area is titled 'Single Sign-on (SSO)' and contains the following information:

- RingCentral Single Sign-on (SSO) service lets your company authenticate your RingCentral users through your company-level network login credentials.**
- About RingCentral SSO service.** [Learn More](#)
- For the first time setup, please finish the configuration in order to turn on SSO for your company.
- 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. [Edit](#)
    - 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](#)
- Enable SSO**
  - Enable SSO Service
  - Identity Provider Entity ID**: http://www.okta.com/fgeuigrhTGEfjdn
  - SSO unique ID**: Email
- [Save](#)

## 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
x

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 v

Browse

**SSO General Information**

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

**Enable SSO**

Enable SSO Service

**Identity Provider Entity ID**

http://www.okta.com/fgeuighrTGEfjdn

Allow users to log in with SSO or RingCentral credential

**SSO unique ID**

Email

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.

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

**Contact Customer Support**

Customer support number

1

**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.

**Enable SSO**

Enable SSO Service

**Identity Provider Entity ID** **SSO unique ID**

http://www.okta.com/fgeuighTGEfjdn Email

Allow users to log in with SSO or RingCentral credential

**6**

## Directory Integration

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

### Active Directory

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

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

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

To set up the RingCentral integration service:

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

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' tab is active, showing the user 'Dave | (650) 555-0012 Ext. 101' and options for 'Get Help' and 'Log Out'. The main navigation bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Tools' dropdown menu is open, with 'Directory Integration' highlighted. Below the navigation, the 'Company Shortcuts' section contains several tiles: 'Company Info', 'Phone Numbers', 'Auto-Receptionist', 'Edit Company Business Hours', 'Change Company Greeting', 'Set Company Caller ID', and 'Publish Company Info to Directory Assistance'. The 'Directory Integration' tile is highlighted with a red circle and the number '2'. Below this, the 'Select Directory Provider' section shows 'Active Directory' selected with a red circle and the number '3'. The 'Okta Setup' section contains the following steps:

- 4** Enable Active Directory
- 5** Become Okta Member
- 6** 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.
- 7** Review Provisioning 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.

## HIPAA Conduit Setting\*

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

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

\*Available for US users only.

The image consists of two screenshots from the RingCentral Admin Portal, illustrating the steps to activate the HIPAA Conduit Setting.

**Top Screenshot:** Shows the Admin Portal interface. The 'Tools' tab is selected in the top navigation bar. A dropdown menu is open under 'Tools', and 'HIPAA Conduit Setting' is highlighted. A red circle with the number '1' points to the 'Admin Portal' dropdown, and a red circle with the number '2' points to the 'HIPAA Conduit Setting' option in the dropdown menu.

**Bottom Screenshot:** Shows the 'Activate HIPAA Conduit Setting' dialog box. A red circle with the number '3' points to the checkbox labeled 'Activate HIPAA Conduit Setting', which is checked. Below the checkbox is a text area containing the following text:

By clicking above and activating the HIPAA Conduit Setting, you are indicating the following:

- You understand, acknowledge, and agree that activation of the HIPAA Conduit setting will result in automatic and permanent deletion from your account of voicemail, facsimile/email, and text messages and voice recordings that are 30 or more days old.
- You understand, acknowledge, and agree that if any voicemail, facsimile/email, or text messages or voice recordings that are 30 or more days old are currently stored in your account, they will be permanently deleted from your account, and such deletion may occur as soon as immediately after activation of the HIPAA Conduit setting.
- You understand, acknowledge, and agree that the deletion functions described above permanently delete messages and recordings such that they are not retained by RingCentral in any form (including on any back up or disaster recovery).
- You represent that you have backed up (by saving on your own systems or media) any voicemail, facsimile/email, or text messages or voice recordings that you wish to retain.
- You understand, acknowledge, and agree that the HIPAA Conduit setting will disable texting through your account and attachment of voicemail and facsimile/email messages to message notification emails sent by RingCentral to you.
- You wish for all of the foregoing to occur.
- You accept responsibility for fully informing your user base of the operation and consequences of the HIPAA Conduit setting, including without limitation the deletion and disablement functions described above.

At the bottom of the dialog box, a red circle with the number '4' points to the 'Accept & Save' button.

## 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.

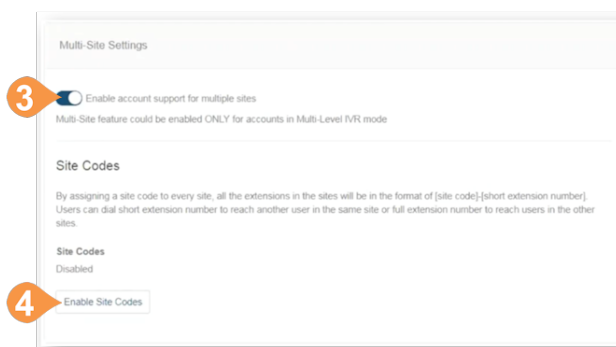
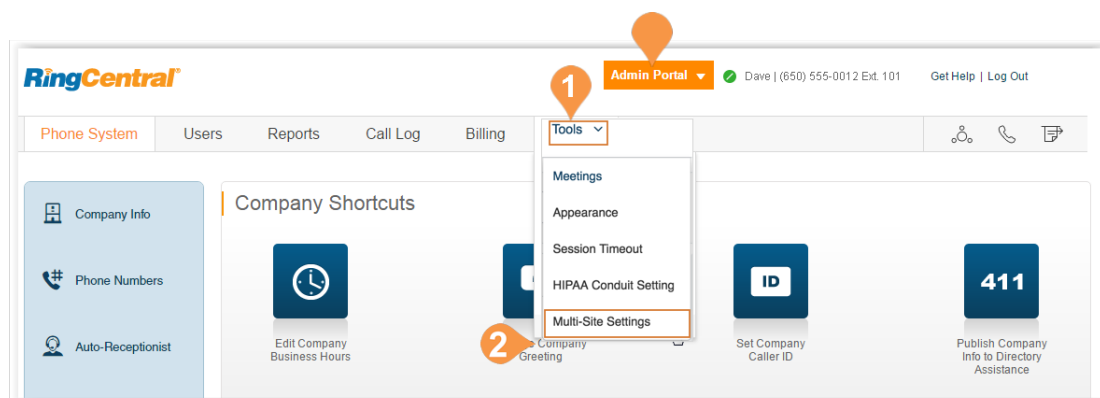
To enable your account to support multiple sites:

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 screenshot illustrates the 'New Site' creation process in the RingCentral Admin Portal. The interface is divided into several steps: 1. Site Info, 2. Site Settings, 3. Number(s), 4. Caller ID Name, 5. IVR Menu, 6. Cost Center Code, and 7. Summary. The 'New Site' dialog is open, showing the 'Site Info' step. The 'General Info' section includes fields for Site Name, Site Address (with a dropdown menu), and Site Extension (with a text input field). The 'Address' section includes a dropdown for 'Please select' and a 'New' button. The 'Copy Settings from' section includes a dropdown for 'Select Site' and a 'Select Site' button. The 'Site Settings' step is also visible, showing regional settings like Time Zone, Home Country Code, Greetings Language, and Business Hours. The 'Number(s)' step is also visible, showing a table of existing and new numbers.

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 Stoecker	104	Direct
(240) 317-2654	United States, Berwyn, MD	Auto-Receptionist		Direct
(619) 220-2356	United States, Bonita, CA	TestQ	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 ID Name **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
<input type="radio"/> Belmont Main 1010		1010	English (U.S.)
<input type="radio"/> Chicago IVR		1009	English (U.S.)
<input type="radio"/> Denver IVR		1002	English (U.S.)
<input type="radio"/> IVR Menu 1006		1006	English (U.S.)
<input type="radio"/> IVR Menu 1007		1007	English (U.S.)
<input type="radio"/> IVR Menu 1008		1008	English (U.S.)
<input type="radio"/> IVR Menu 1012 TB		1012	English (U.S.)
<input type="radio"/> IVR Menu 1015		1015	English (U.S.)
<input type="radio"/> Magic_Land_IVR 1004		1004	English (U.S.)
<input type="radio"/> Main IVR		1001	English (U.S.)

Total: 15 < 1 2 >

Back Next

New Site

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

Cost Center Code [Learn More](#)

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' configuration window at the 'Extension Number Length' step. It displays 'Max Extension Length: 5' and 'Please adjust the length to be 5 or smaller or increase maximum extension length'. The 'Site Code Length' is set to 2 and the 'Short Extension Number Length' is set to 4. 'Cancel' and 'Next' buttons are at the bottom.

The second screenshot shows the 'Site Codes' configuration window at the 'Provision Site Codes' step. It displays a table with columns: Site Name, Site Code, Short Site Ext. Number, and Full Site Ext. Number. The table contains two rows: 'Company' with Site Code 11 and 'Local Office' with Site Code 33. A red warning message states: 'Extension number is reserved for special functions' next to the '911' short extension number for the Local Office. 'Back' and 'Next' buttons are at the bottom.

The third screenshot shows the 'Site Codes' configuration window at the 'Adjust Extension Numbers' step. It displays a table with columns: Ext. Name, Target Site, Site Code, Ext. number with Site Code, Type of Conflict, New Short Ext. Number, and New Full Ext. Number. The table contains two rows: 'TopIVR' (Company, Site Code 11, Ext. number 11001, Conflict: 'Extension number is too long', New Short Ext. Number 1, New Full Ext. Number 11001) and 'IVR Menu 1002' (Local Office, Site Code 33, Ext. number 331002, Conflict: 'Extension number is too long', New Short Ext. Number 2, New Full Ext. Number 33002). 'Back' and 'Next' buttons are at the bottom.

The fourth screenshot shows the 'Users With Extensions' view. It displays a table with columns: Status, Name, Number, Ext., Roles, Department, Site, and Msg. The table contains three rows: 'Admin User' (13103, Super Admin, BKG, 0 / 0, Disable), 'Simple User' (33108, Standard 0, Local Office, 0 / 0, Disable), and 'User' (11102, Super Admin, Company, 1 / 1). A red circle highlights the 'Number' column for the 'Simple User' row.

## 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 process of moving users across sites in the RingCentral Admin Portal. It is divided into three numbered steps:

- Step 1:** The 'Users' tab is selected in the top navigation bar.
- Step 2:** In the 'Users With Extensions' table, three users are selected with checkboxes. The 'Change Site' button is highlighted.
- Step 3:** The 'Select Site' modal dialog is open, showing a list of sites. 'New Site 1' is selected, and the 'Change Site' button is highlighted. A checkbox for 'Adjust time and regional settings to the settings of the new site?' is also visible.

Status	Name	Number	Ext.	Roles	Department	Site	Meg.	
<input type="checkbox"/>	9dot4 Prod...	(650) 437-5...	101	Super Admin	Company		5 / 5	
<input checked="" type="checkbox"/>	Andrew White	(913) 228-1...	8072	Standard (L...	IT	MagicLand	0 / 0	Resend Invite Delete
<input checked="" type="checkbox"/>	Brian Bolan...	(323) 388-4...	8057	Super Admin	Solutions E...	SoCal (Dont...	2 / 2	Delete
<input checked="" type="checkbox"/>	Charlene Lin		8071	Standard (L...		New Land	0 / 0	Resend Invite Delete



## 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 displays the RingCentral Admin Portal interface for managing IVR menus. The left sidebar shows the navigation menu with 'Auto-Receptionist' selected (indicated by a red circle '1'). The main content area has the 'IVR Menus' tab active, showing a table of IVR menus. The 'Change Site' button for the selected menu is highlighted with a red circle '2'. A 'Select Site' modal dialog is open, showing a list of available sites. The 'New Site 1' option is selected (indicated by a red circle '3').

**Phone System** | **Users**

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

Create your own Auto-Receptionist for your Phone System. Customize your options for effective call management. [Learn More](#)

General Settings | **IVR Menus** | IVR Editor | Prompts Library

Search [ ] Language [ ] [ Validate Menus ] [ + New IVR Menu ]

Sites [ ]

Before you can switch your company call handling to Multi-Level IVR, you must first add and set up your IVR Menu. [Learn More](#)

**Change Site**

Name	Numbers	Ext.	Language	Site	
<input checked="" type="checkbox"/> Belmont Main 1010		1010	English (U.S.)	Company	<a href="#">Add Number</a> <a href="#">Delete</a>

Select Site [X]

Search [ ]

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 steps to move a call queue between sites in the RingCentral Admin Portal. The interface is divided into a left sidebar and a main content area.

**Step 1:** The 'Phone System' tab is selected in the sidebar, and the 'Groups' option is highlighted. A callout '1' points to this area.

**Step 2:** In the main content area, the 'Call Queues' tab is active. A table lists call queues, with 'Denver Test Queue' selected. A 'Change Site' button is visible. A callout '2' points to this button.

**Step 3:** A 'Select Site' modal is open, showing a list of sites. 'New Site 1' is selected. A checkbox labeled 'Adjust time and regional settings to the settings of the new site?' is checked. A 'Change Site' button is at the bottom right. A callout '3' points to this button.

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

## Audit Trail

## Audit Trail

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

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

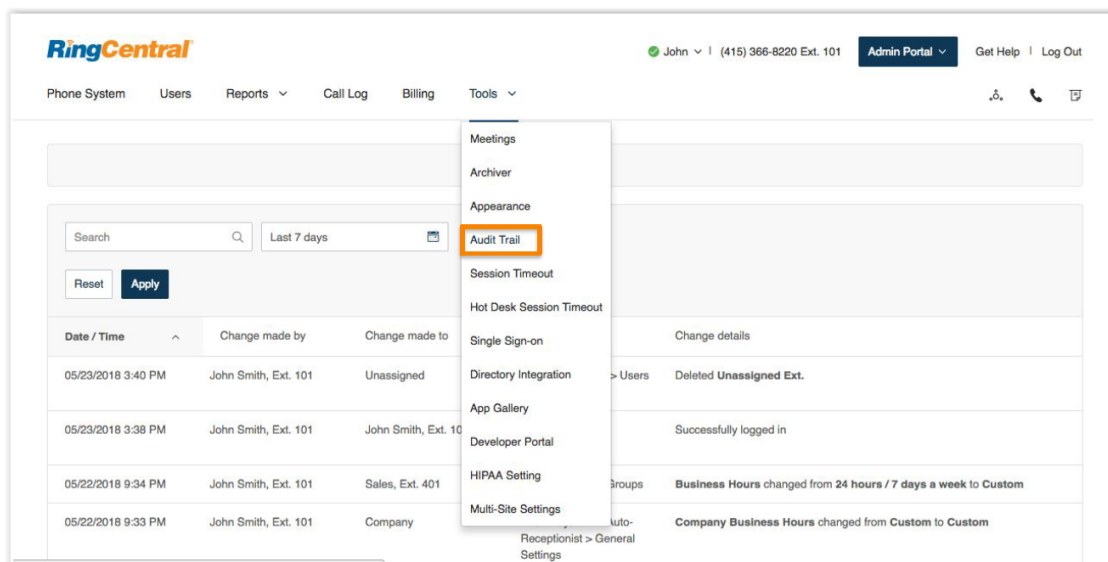
This feature provides the admin with an efficient way to control systems. It is enabled for all customers automatically. To disable, you must contact support.

### Access Audit Trail

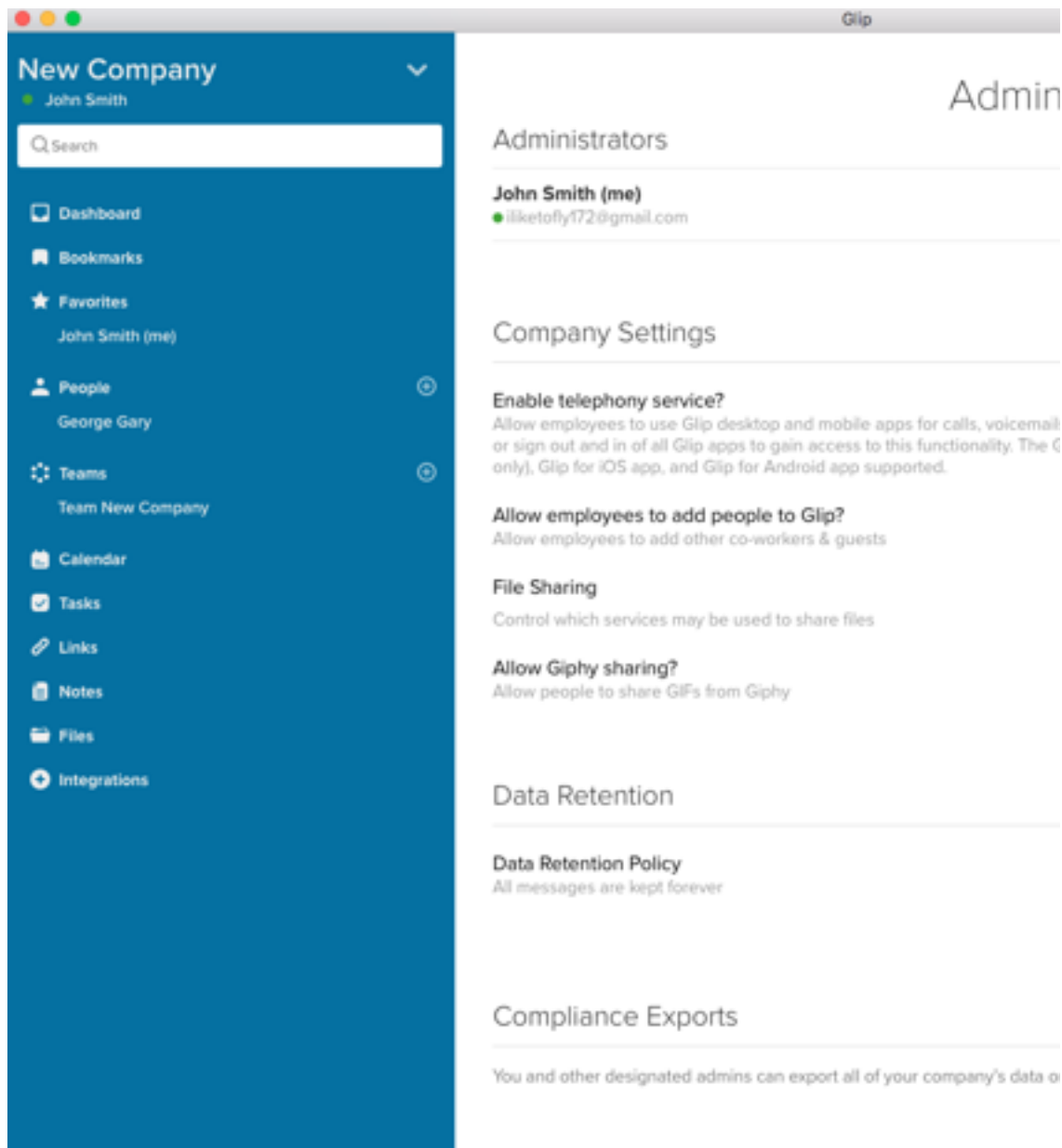
1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Tools > Audit Trail**.

Audit Trail captures changes to the following events:

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



- Unified Application Admin Settings**  
**Administrators:** administrators added or removed (First Last, Ext.)  
**Company settings:** Enable telephone service; Allow employees to add people (on/off); File sharing (service, on/off) for example *Google Drive on/off, Evernote on/off, etc.*; Allow Giphy sharing (max rating) for example, *Max rating of PG-13*  
**Data Retention:** Policy set to N days  
**Compliance exports:** Exports (on/off); Request/download export enabled/disabled for *UserName*; Download requested by Name/email



### Audit Trail Report Details

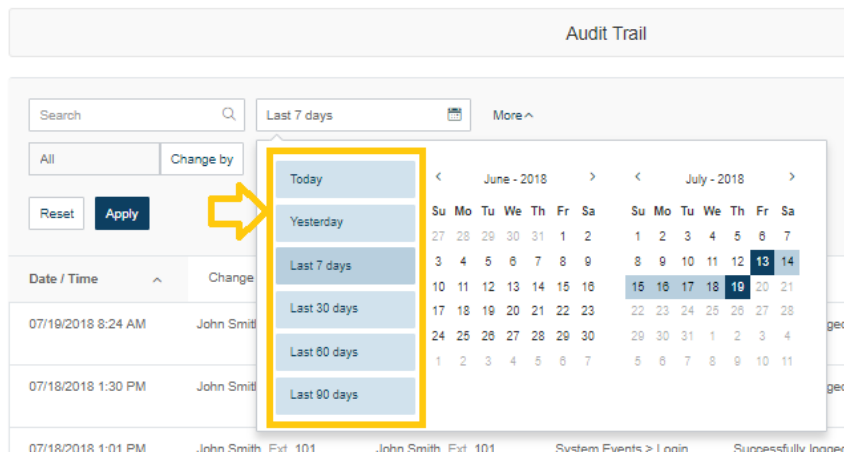
When a particular event is captured, these details are provided in the report:

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

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

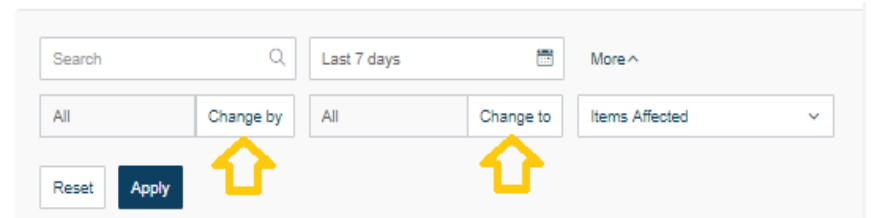
### Search Capability

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



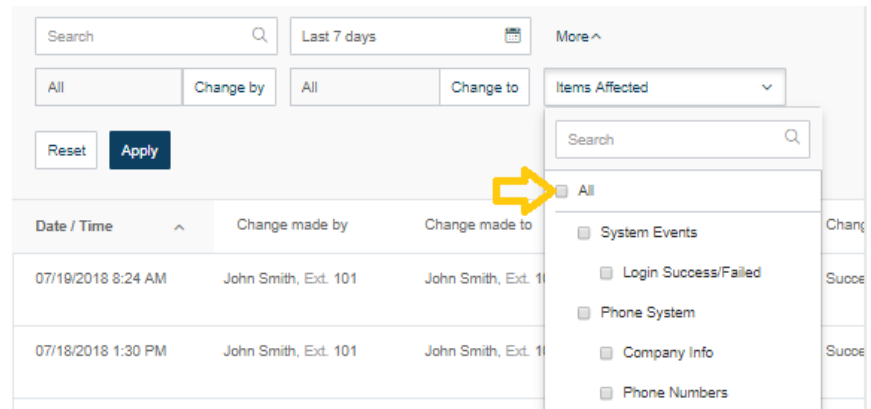
### Search by Change

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



### Search by Items Affected

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

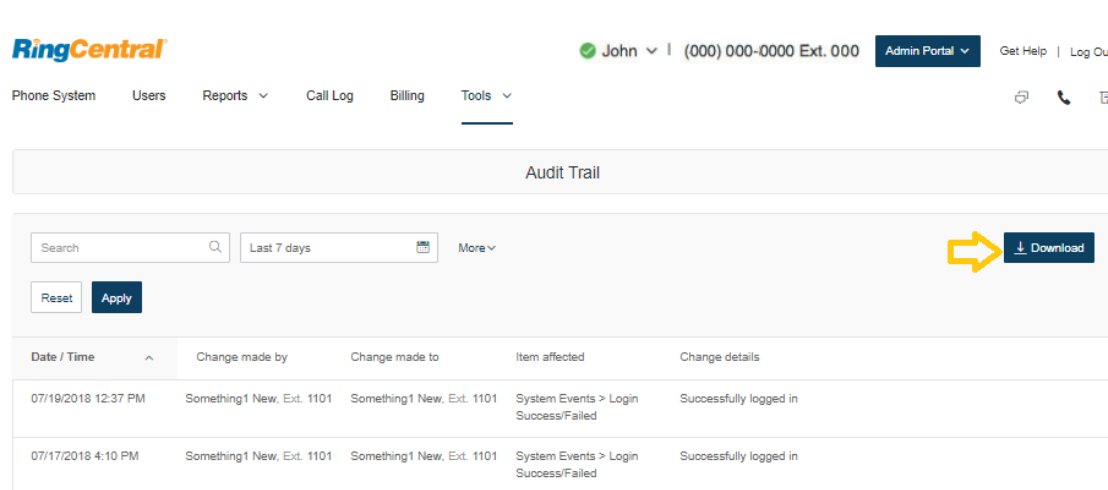


## Downloading an Audit Trail Report

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

From the Admin Portal,

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



The screenshot displays the RingCentral Admin Portal interface. At the top, the RingCentral logo is on the left, and user information (John, (000) 000-0000 Ext. 000) and navigation links (Admin Portal, Get Help, Log Out) are on the right. Below this is a navigation menu with tabs for Phone System, Users, Reports, Call Log, Billing, and Tools. The Tools tab is selected, and the Audit Trail page is open. The page features a search bar with a magnifying glass icon, a date filter set to 'Last 7 days', and a 'More' dropdown menu. A yellow arrow points to a 'Download' button with a download icon. Below the search bar are 'Reset' and 'Apply' buttons. The main content area is a table with the following columns: Date / Time, Change made by, Change made to, Item affected, and Change details. Two rows of data are shown, both indicating 'Successfully logged in' events.

Date / Time	Change made by	Change made to	Item affected	Change details
07/19/2018 12:37 PM	Something1 New, Ext. 1101	Something1 New, Ext. 1101	System Events > Login Success/Failed	Successfully logged in
07/17/2018 4:10 PM	Something1 New, Ext. 1101	Something1 New, Ext. 1101	System Events > Login Success/Failed	Successfully logged in

# 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<sup>®</sup> and iPad<sup>®</sup> controller.

- Windows, or Mac with Mac OS<sup>®</sup> 10.9 or later
  - For single monitor: Intel<sup>®</sup> 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<sup>®</sup> 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. At the top right, the user is logged in as Alex | (650) 446-5659 Ext. 101. The navigation menu 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 Downloads section is highlighted, showing options for RingCentral Rooms, Webinar Settings, and Meetings Reports. The iPad Controller section for RingCentral Rooms is shown, with a button to Download on the App Store. The RingCentral Rooms section for Conference Room is shown, with buttons to Download for Mac and Download for Windows. Numbered callouts 1 through 5 indicate the steps described in the text.

## 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.

The screenshots show the 'Add RingCentral Rooms With' dialog box in the RingCentral Admin Portal. The left sidebar shows the navigation menu with 'RingCentral Rooms' selected. The main content area displays three different integration options:

- Add RingCentral Rooms With Google Service Account:** This form includes fields for 'Room Resource Delegate Account' (with a dropdown), 'Google Service Account' (with a text input), 'Service Account Private Key (.p12)' (with an 'Upload' button), 'Room Name', 'App Lock Code', and 'Country' (with a dropdown set to 'United States'). It has 'Cancel', 'Verify', and 'Add' buttons at the bottom.
- Add RingCentral Rooms With Exchange/Office 365:** This form includes fields for 'Room Resource Delegate Account' (with a dropdown), 'Room Resource Delegate Password' (with a text input), 'EWS URL' (with a text input starting with 'https://'), 'Domain' (with a text input), 'Room Name', 'Room Resource Account in Exchange/Office 365' (with a text input), 'App Lock Code', and 'Country' (with a dropdown set to 'United States'). It has 'Cancel' and 'Add' buttons at the bottom.
- Add RingCentral Rooms With No Calendar Integration:** This form includes fields for 'Room Name', 'App Lock Code', and 'Country' (with a dropdown set to 'United States'). It has 'Cancel' and 'Add' buttons at the bottom.

At the top right of the dialog, there is a '+ Add RingCentral Rooms With' button and a dropdown menu showing the selected integration type: 'Google Service Account Exchange/Office 365 No Calendar Integration'. Below this, there is a table listing existing rooms with columns for 'Room Name', 'App Lock Code', and 'Country', and 'Edit' and 'Delete' buttons for each row.

## 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

- From the **Admin Portal**, select the **Tools** tab.
- Click **Meetings**.
- Click **RingCentral Rooms**.
- 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**.
- 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 'Admin Portal' and user information 'Dave | (650) 555-0012 Ext. 101'. Below this is a secondary navigation bar with tabs: 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools' (which is selected). Under 'Tools', there are sub-tabs: 'Downloads', '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'. A search bar is present with the text 'Search by Room name' and a 'Search' button. 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

There are 'Add RingCentral Rooms With' buttons above and below the table.

## 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.

1. Admin Portal

2. Tools

3. RingCentral Rooms

4. General Settings

5. Enter email to get following event notifications:

- Controller (iPad) disconnected
- Selected mic, speaker or camera has disconnected
- Low bandwidth network is detected
- RingCentral room is offline
- Controller (iPad) battery is low
- High CPU usage is detected

Email recipients:

simon.tumansky@ringcentral.com

Use semicolon to separate multiple email addresses.

6. Advanced settings:

- Upcoming meeting alert
- Start AirPlay service manually
- Weekly system restart
- Display meeting list on TV
- Automatic direct sharing using ultrasonic proximity signal
- Display end-of-meeting experience feedback survey

Support contact of your IT team:

Support Email

Support Phone

7. Background image for RingCentral Rooms (Max. 1920 x 1080, 5 MB)

Upload

8. Save

## Manage RingCentral Rooms Display Settings

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

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

To set display settings for RingCentral Rooms:

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Tools' tab is selected, and the 'Meetings' sub-tab is active. The 'RingCentral Rooms' menu item is highlighted in the left sidebar. The 'Display Settings' sub-tab is selected under the 'Rooms' section. The main content area shows a configuration for '1 participant' with a 'Me' participant view and a 'Shared Content' view. Below this, there are sections for '2 participants' and '3 or more participants', each with an 'Other' participant view and a 'Shared Content' view. The '1 Display' button is selected under the '1 participant' section. The 'Save Changes' button is visible at the bottom right of the configuration area.

## Configure Webinar Settings

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

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

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

You can edit settings for RingCentral Webinar:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Meetings**.
3. Click **Webinar Settings**.
4. Edit the settings as follows:
  - **Banner:** upload or delete a banner image for all webinars. The banner is displayed at the top of your registration page and email header.
  - **Logo:** upload or delete a logo for all Webinars to be displayed on the right side of the Webinar topic on your invitation page, registration page, and in the email invitation to the webinar.
  - **Registration Settings:** customize settings for how registrants register for and join webinars.

The screenshot shows the RingCentral Admin Portal interface. At the top, there's a navigation bar with 'Admin Portal' and user information. Below that, a menu bar includes 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Tools' dropdown is open, showing 'Meetings' selected. In the left sidebar, 'Webinar Settings' is highlighted. The main content area is titled 'Webinar Settings' and contains three sections: 'Branding', 'Registration Settings', and 'Email Settings'. The 'Branding' section has 'Banner' and 'Logo' upload options with detailed 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 options with 'Edit' links.

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

### Registration Settings

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

### Approval

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

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

## 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 customized questions that are either short answer or multiple choice.

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

**Registration** [x]

Registration Questions Custom Questions

Add Registration Fields

First Name, Last Name and Email Address required.

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

Cancel Save All

**Registration** [x]

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

Answer

Add another answer

Create Cancel

Cancel Save All

## View Meetings Reports

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

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

Click **Export** to export a report.

The screenshot shows the RingCentral Admin Portal interface. At the top, there's a navigation bar with 'Admin Portal' and user information 'Dave | (650) 555-0012 Ext. 101'. Below this is a menu with 'Phone System', 'Users', 'Reports', 'Call Log', 'Billing', and 'Tools'. The 'Reports' section is active, showing a sidebar with 'Downloads', 'RingCentral Rooms', 'Webinar Settings', and 'Meetings Reports'. The main content area lists four report types: 'Daily Report', 'Usage Report', 'Inactive Users', and 'Webinar Report'. Below this, two report views are shown. The first is the 'Usage Report' for the period 07/08/2016 to 07/09/2016, displaying a table with columns for Name, Meetings, Participants, and Meeting Minutes. The second is the 'Inactive Users' report for the same period, displaying a table with columns for Name, Client Version, and Last Login.

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

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	Setting	Status
In Meeting (Basic)	Chat	On
	Feedback to RingCentral	On
	Allow host to put attendee on hold	On
	Private chat	On
In Meeting (Advanced)	Closed caption	On
	Only show default email when sending email invites	On
	Local recording	Off
	Breakout room	Off
	Virtual background	On
	Peer to Peer connection while only 2 people in a meeting	On
	Listening ports range (11127 - 11140)	On
	Allow users to select only signed-in users can join meetings in their client settings	On
Email Notification	When attendees join meeting before host	On
	When a meeting is deleted	Off
Audio Options	Allow users to select stereo audio in their client settings	On
	Allow users to select original sound in their client settings	On
	3rd party audio conference	Off
Integration	Google calendar	On
	Dropbox	On
	Microsoft (One Drive)	On
	Google drive	On
HTML Email Template	Use HTML format email for Outlook plugin	On
	Box	On

## 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](#).

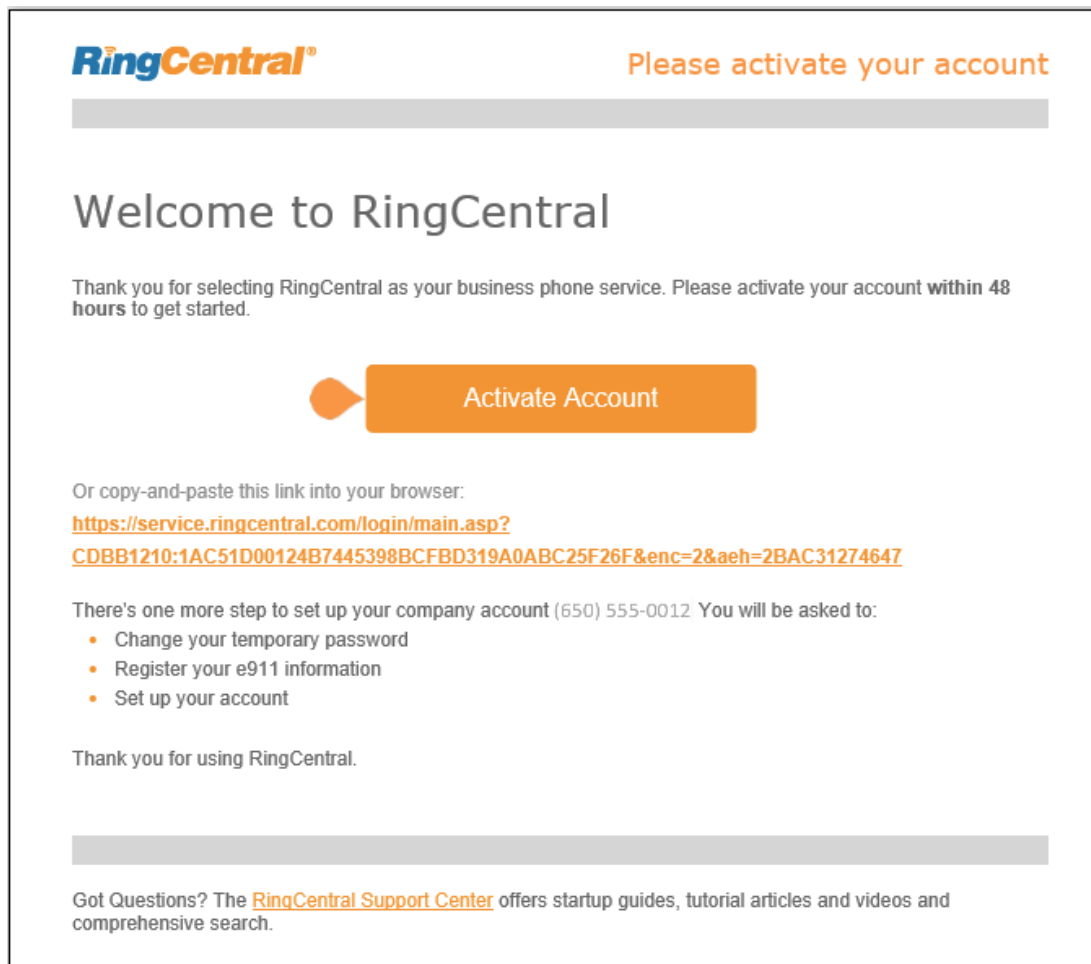
### Activate Your Account

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.*




The screenshot shows an email from RingCentral with the following content:

**RingCentral** 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>

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.

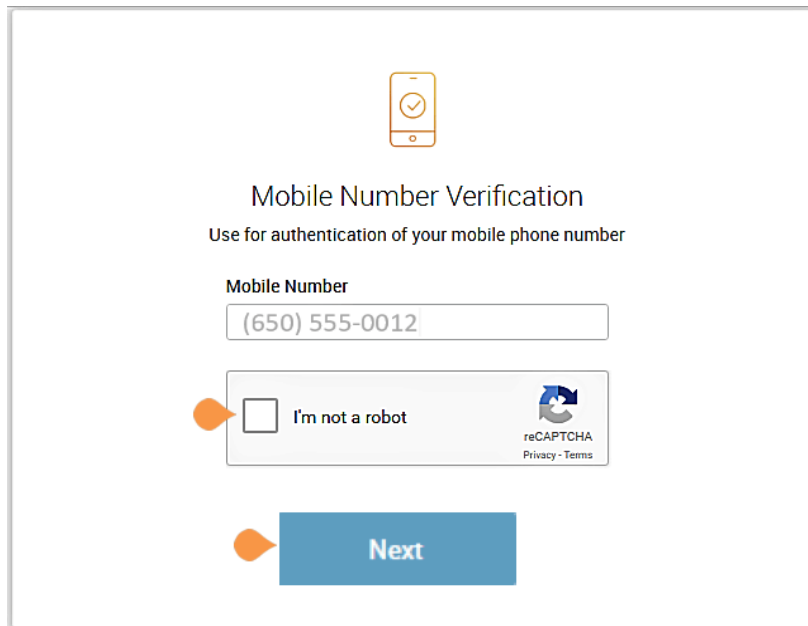
## Your Account Security

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**.

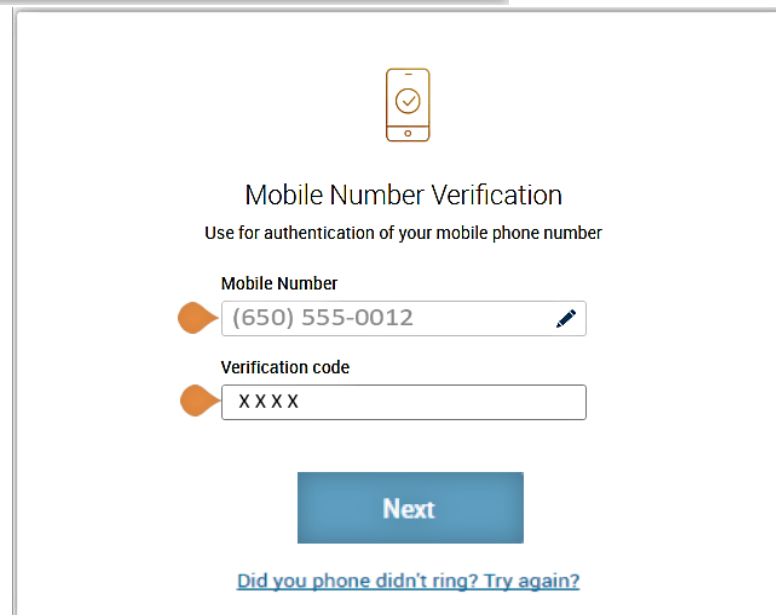


Mobile Number Verification  
Use for authentication of your mobile phone number


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

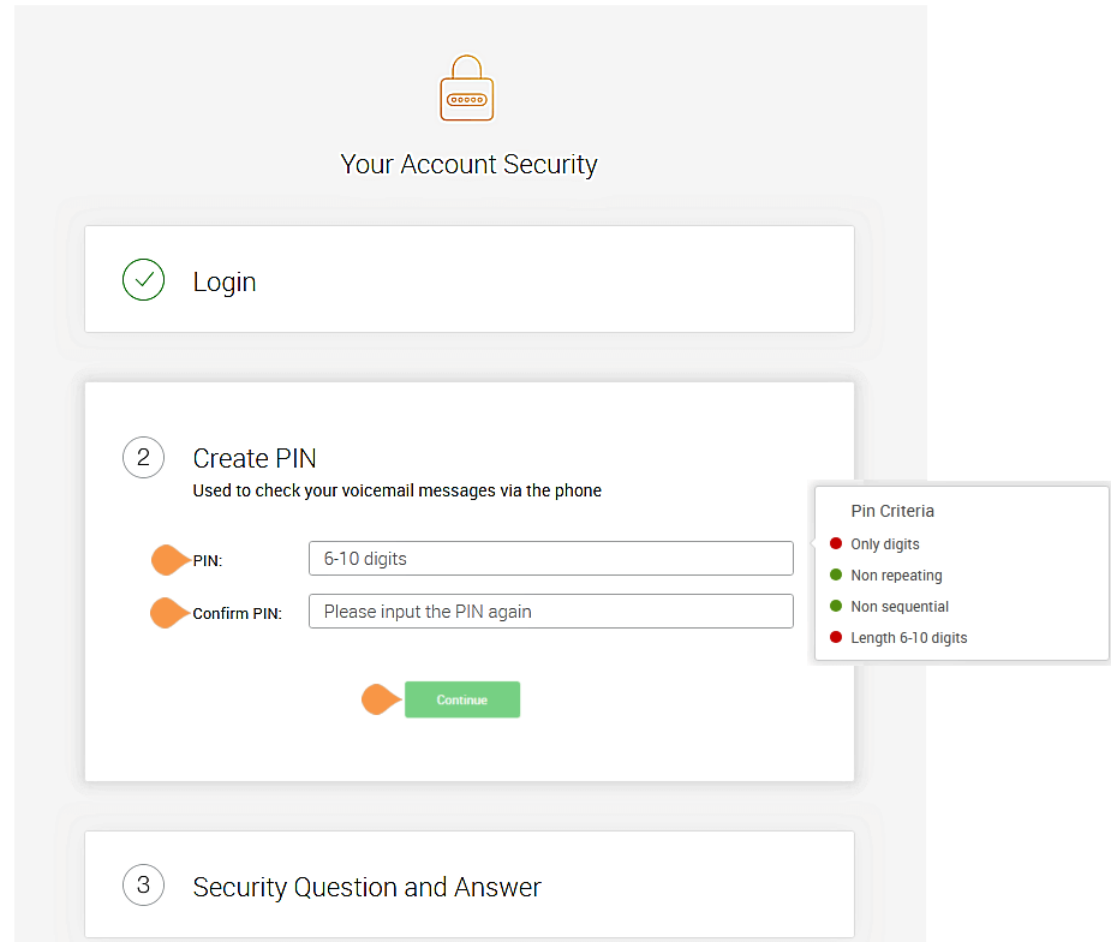
The next step in **Your Account Security** is to set your PIN.


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**.





 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

3  Security Question and Answer

**Pin Criteria**

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

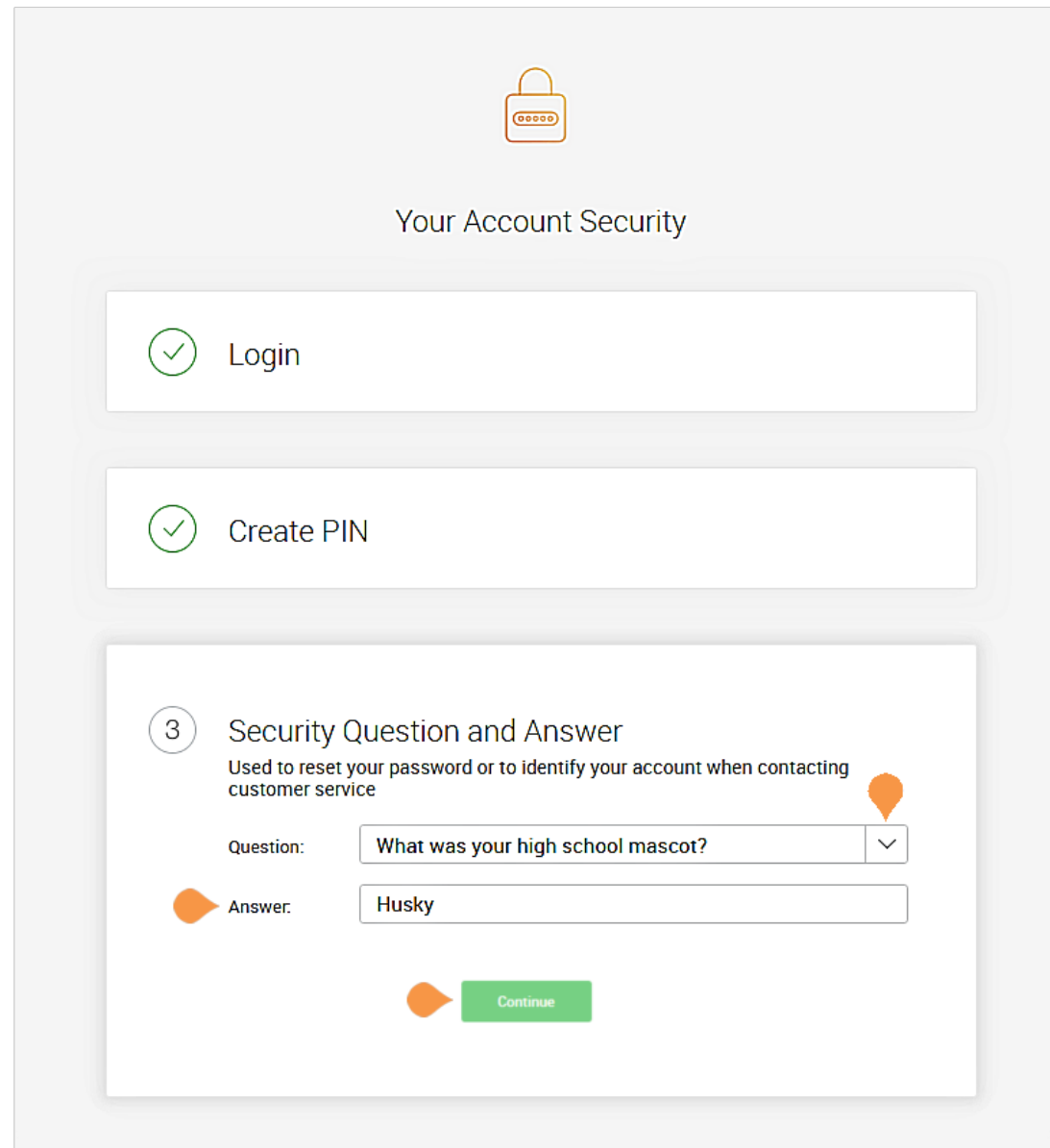
## Set Your Security Question and Answer


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:

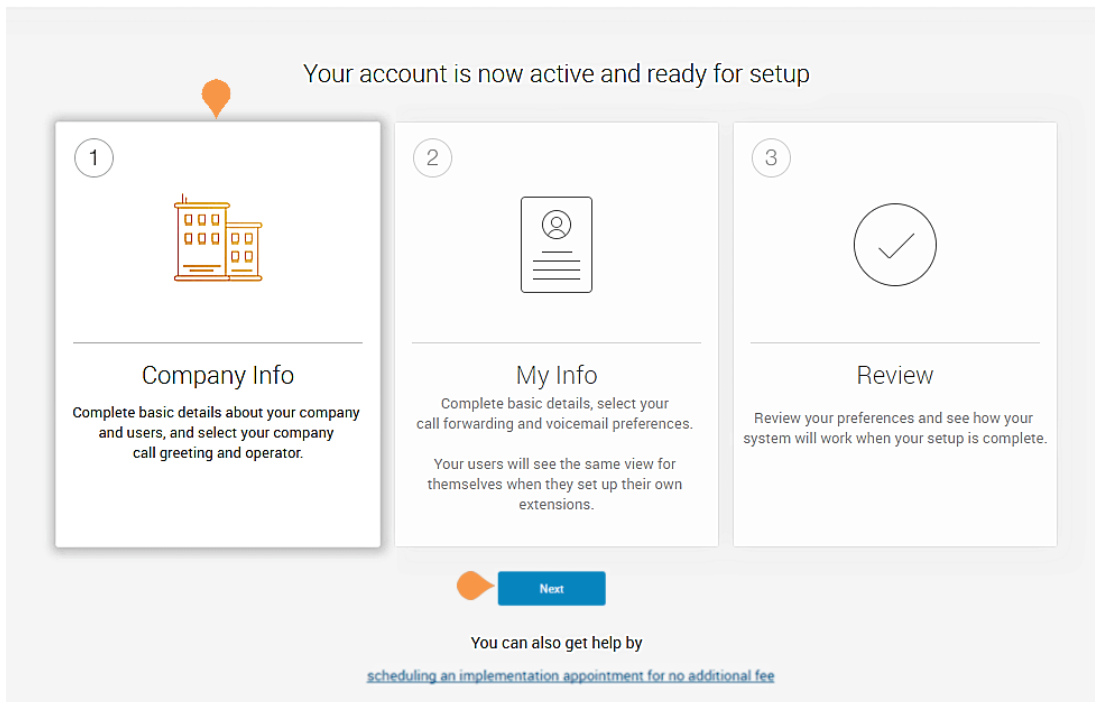


## Your Company Account is now ready for setup




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 268.

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

13. Click **Set Up Now**.

The screenshot shows the 'Users' step in the RingCentral Express Setup process. At the top, there are three navigation tabs: 'Company Info' (selected), 'My Info', and 'Review'. Below these are three sub-tabs: 'Users', 'Company Greeting', and 'Operator'. The main content area features an icon of three stylized human figures representing users, with the word 'Users' centered below it. Underneath, the text reads '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 icon 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 a blue 'Set Up Now' button with an orange speech bubble icon to its left, and a link labeled 'Skip This Step' below it.

## 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)

---

1

First Name:

Last Name:

Email:

Use email to log in

Contact Number:

Extension:

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 customize it.

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

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

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

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

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

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

The screenshot shows the 'Company Greeting' setup screen in the RingCentral Admin interface. At the top, there are three navigation tabs: 'Company Info' (selected), 'My Info', and 'Review'. Below these are three sub-tabs: 'Users', 'Company Greeting' (selected), and 'Operator'. The main content area features a megaphone icon and the title 'Company Greeting'. Below the title is the question: 'Which greeting would you like callers to hear when they dial your company number?'. A playback control bar shows a play button, a progress slider at 00:00 / 00:00, and a volume icon. The default greeting text is: '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**.' At the bottom, there are two buttons: 'Customize' and 'Keep Default' (highlighted in blue). Below the buttons is a link that says 'Skip This Step'.

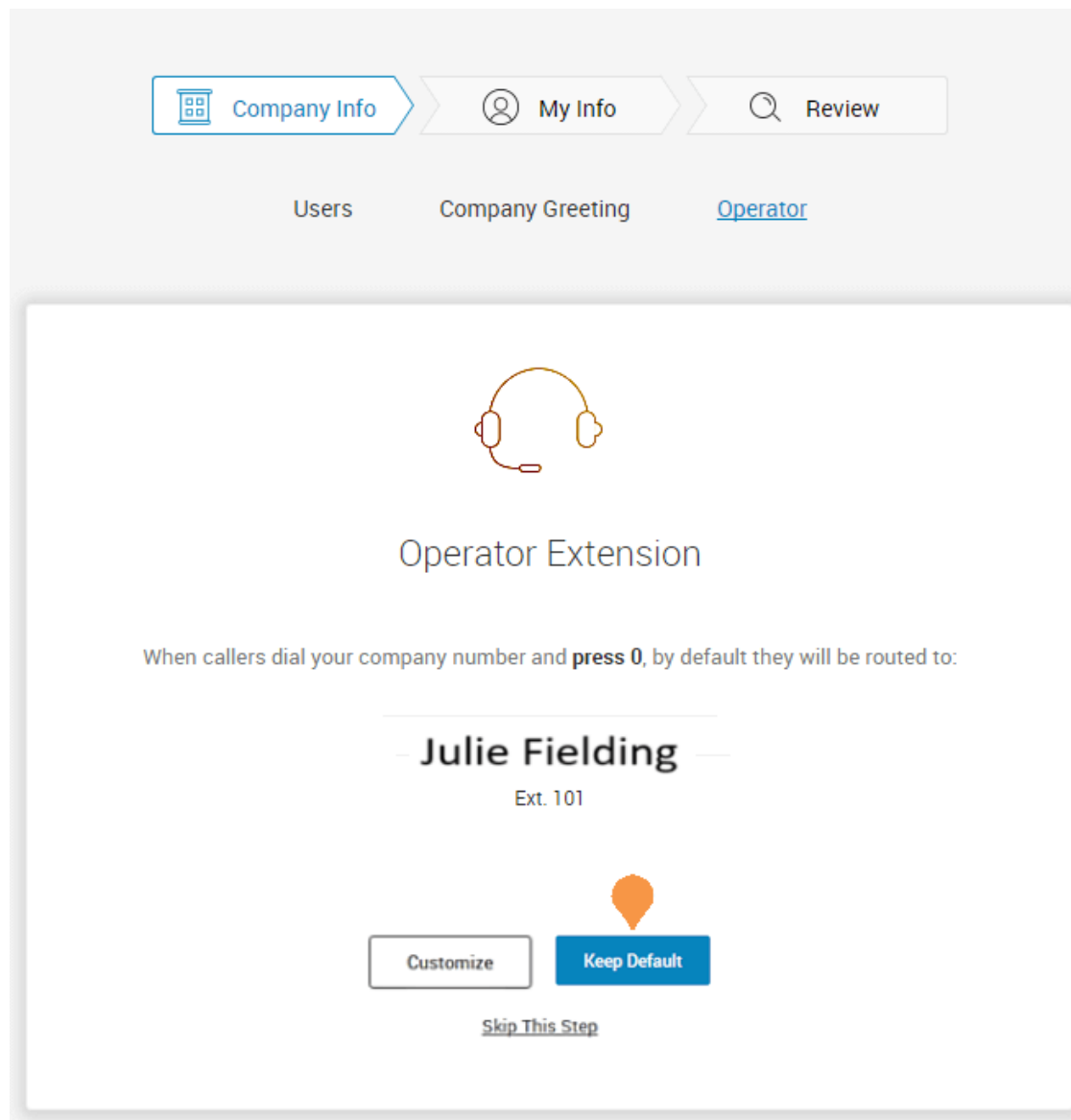
## Set the Operator Extension

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



The screenshot displays the RingCentral Admin Guide interface for setting the Operator Extension. At the top, there are three navigation tabs: "Company Info" (selected), "My Info", and "Review". Below these tabs are three sub-sections: "Users", "Company Greeting", and "Operator" (selected). The main content area features a headset icon and the heading "Operator Extension". Below the heading, 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 name "Julie Fielding" in a large font, with "Ext. 101" below it. At the bottom, there are two buttons: "Customize" and "Keep Default" (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="checkbox"/> 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**.



### 3 Emergency Calling - Registered Location

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


 Name

United States  

Street Address

Apartment/Suite

City


Alabama  

Zip code

**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](#).

 **Agree and Continue**

## My Info > Call Forwarding

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

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

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

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

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

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

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**.

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 277.

### Record or Import a Voicemail Custom Greeting

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

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

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

32. Click **Save**.

Company Info My Info Review

My Info Call Forwarding Voicemail Greeting

### 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**

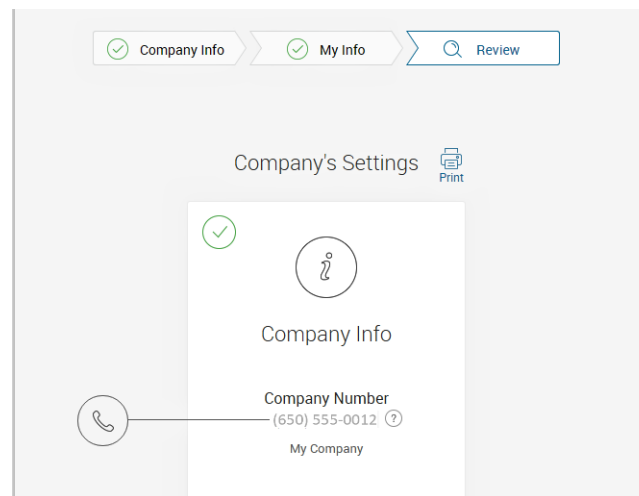
[Skip This Step](#)

## Review Your Company Settings

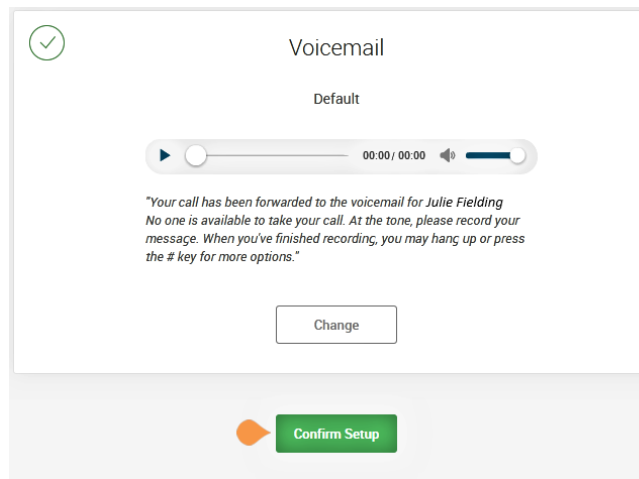
In this step, you'll review the settings set up. Check that these are correct. Continue scrolling to check or adjust all of the settings:

- 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**.

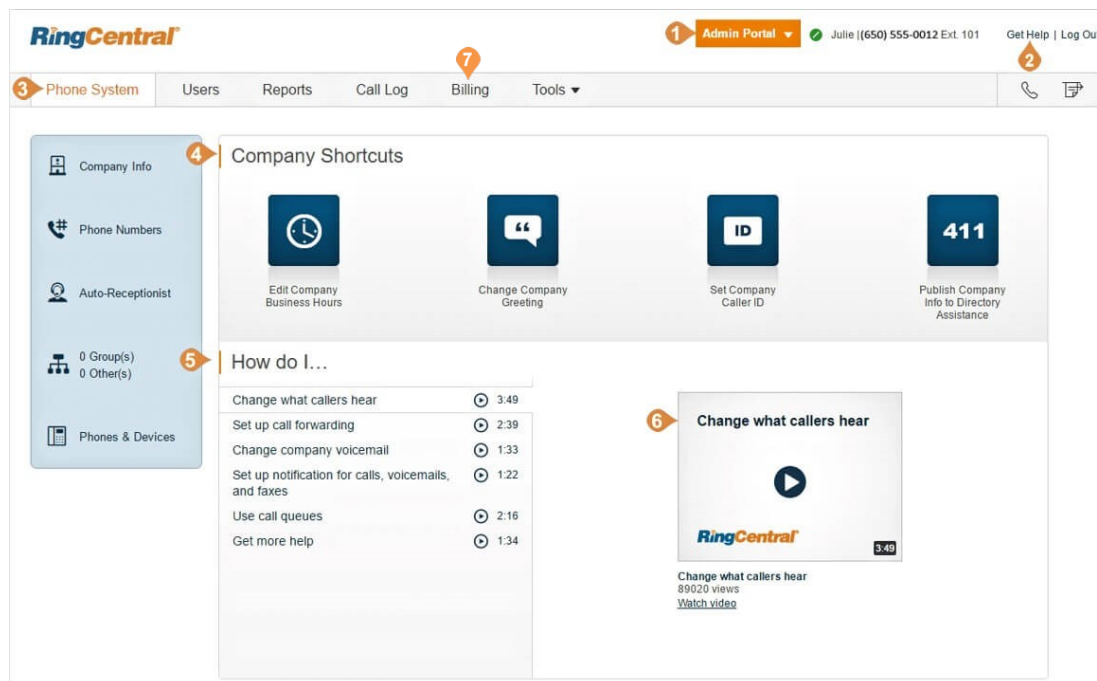
*In the following pages, you'll log in to your RingCentral account.*

The screenshot shows a 'Congratulations!' message in a light gray box. Below the title, it says 'You've just completed the initial setup for your RingCentral phone.' followed by a rocket ship icon. The text continues: '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.' There are two blue buttons with orange arrowheads: 'Schedule Now' and 'Go to My Account'. Below the second button, it says 'View additional settings, configuration options, and access your full account to the RingCentral website.'

## The Admin Portal

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

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



### To Find Information About

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

### Knowledgebase Articles

For further instructions on these subjects:

- [Sign in](#)
- [Changing your password](#)
- [Call Handling](#)
- [Emergency Calling - Registered Location](#)
- [Voicemail Greetings](#)

Continue to the following page.

## While You are Using RingCentral Products

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

### [Attend a Training Webinar](#)

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

### [Post in the RingCentral Community](#)

Share your ideas and feedback, get your problems solved, and give back by helping others! See [RingCentral Community](#).

### [Download Applications](#)

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

## Appendix B: Bulk Purchase and Upload

## Introduction

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

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

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

### Bulk Purchase of Users

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

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

*continued on the next page...*



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

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

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

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

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

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

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

Contact your sales representative if you're having trouble.

**Add Users and Phones**
✕

**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:

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.

One Time Charges	Quantity	Sub-total*
Phones	3	\$357.00
Recurring Charges		Sub-total*
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.

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

## Bulk Upload of Users

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

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

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

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

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


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

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

### Enable Users

**You have 18 Users to enable.**  
If you already have a filled out template please proceed to Step 3.

**Step 1: Get Template**

Download:  or Email:

**Step 2: Fill Out Template**



**Step 3: Upload File**

## 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.

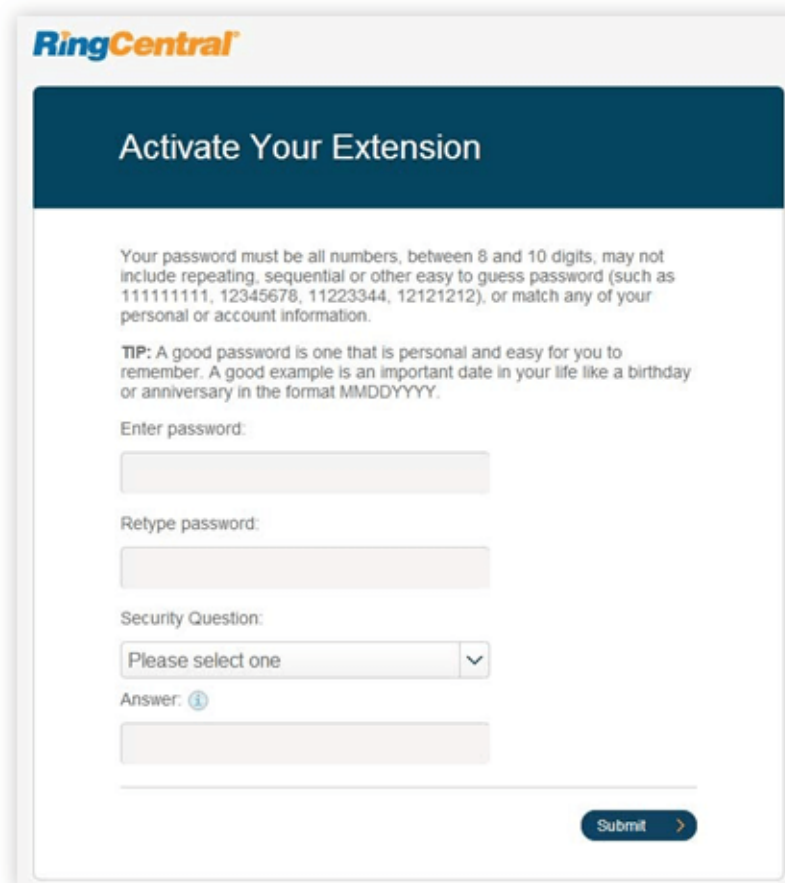
Common errors include:

- 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 screenshot shows a web form titled "Activate Your Extension" with the RingCentral logo at the top left. The form contains the following elements:

- Header:** "Activate Your Extension" in white text on a dark blue background.
- Instructions:** "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."
- TIP:** "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."
- Fields:**
  - "Enter password:" followed by a text input field.
  - "Retype password:" followed by a text input field.
  - "Security Question:" followed by a dropdown menu with "Please select one" and a downward arrow.
  - "Answer:" followed by a text input field and a small information icon (i).
- Submit Button:** A dark blue button with the text "Submit" and a right-pointing 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:

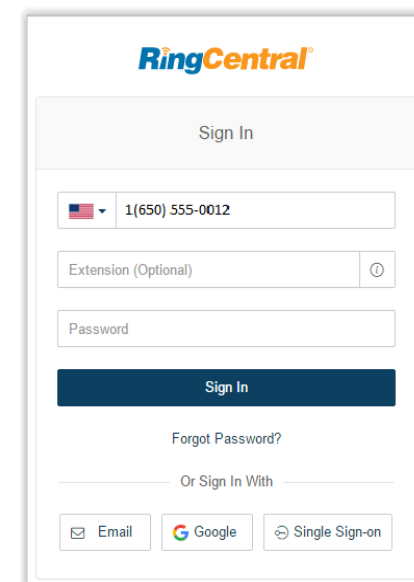
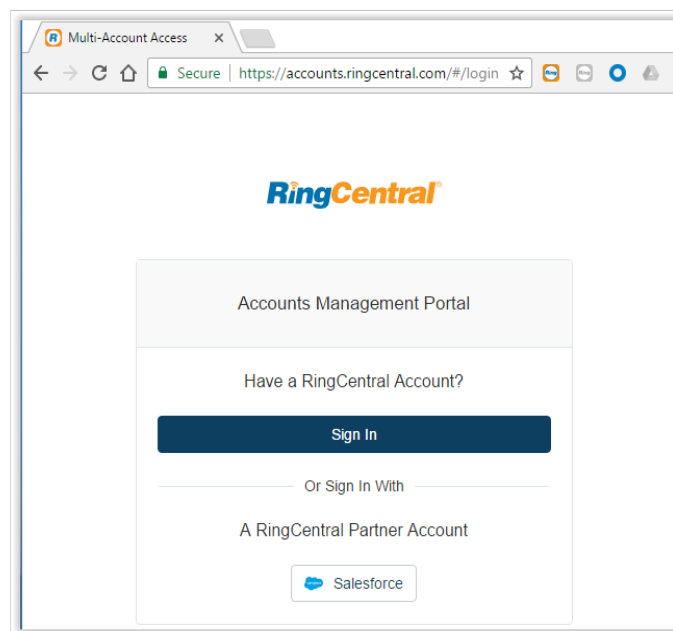
- Centralizes access for customers with multiple RingCentral accounts
- Allows them to link all of their accounts in the Accounts Management portal.
- Allows company admins to access their RingCentral accounts from a single log in.
- Allows administrators to view services for all accounts from a single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

To access the management portal:

1. Go to [accounts.ringcentral.com](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.

The screenshot displays the 'Manage Linked Accounts' interface. At the top, there is a search bar and a 'Link Account' button. Below this is a table of linked accounts. The table has columns for 'Account Name', 'Main Number', 'Owner', 'Ext.', and 'Service Status'. A 'Unlink' button is located above the table. A dropdown menu is open for the 'New York' account, showing various service status options with green checkmarks. The bottom of the page shows a total count of 1998 accounts and pagination controls.

Account Name	Main Number	Owner	Ext.	Service Status
<input type="checkbox"/> New York	(888) 846-0010	John Smith	102	<input checked="" type="checkbox"/>
<input type="checkbox"/> Chicago	(866) 410-0001	Rachel Richards	101	<input checked="" type="checkbox"/>
<input type="checkbox"/> London	+44 (118) 250-0001	Michael Huffman	301	<input checked="" type="checkbox"/>
<input type="checkbox"/> Canada	(587) 404-0140	Charlie Lee	101	<input checked="" type="checkbox"/>
<input type="checkbox"/> San Francisco	(866) 410-0004	Abby Brown	101	<input checked="" type="checkbox"/>
<input type="checkbox"/> Leek	+44 (118) 762-0008	Jennifer Albertson	301	<input checked="" type="checkbox"/>
<input type="checkbox"/> Austin	(888) 846-0010	Francisco Mendoza	101	<input checked="" type="checkbox"/>

## 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
- Inbound SMS
- Outbound SMS

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



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

-  **Green:** The service is available.
-  **Yellow:** There is an error related to the service.
-  **Red:** The service is unavailable.
-  **Grey:** Service status has not been reported.

