RingCentral Office®

User Guide

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

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

RingCentral

Welcome to RingCentral

Welcome to the RingCentral business phone system! If this is your first time logging in, you'll need to activate your RingCentral account.

It will take about 15 minutes to set up your account. You will be asked to verify your extension details, set your password, select a security question & answer, set or import your voicemail greeting, and confirm your emergency location.

Note: *If you leave the Express Setup without finishing, the changes you have made may not be saved.*

You can learn more about user features through Knowledgebase articles and the *RingCentral Office User Guide*.

Activate Your Account

You will see this Welcome Email after your administrator has enabled your account for setup. In this email, you will receive your company phone number and extension (if applicable). The email also indicates whether your account is enabled for login using your Google credentials (if any).

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.

RingCentral®   Welcome

Dear Matt Smith,

Welcome to RingCentral, the Enterprise Cloud Communications Solution built for G Suite and recommended by Google.

- Your company number is: (650) 555-0012
- Your extension number is: 102
- Your email address for login is: mattsmith@example.com

Here's how you can get up and running in a few minutes:

STEP 1	STEP 2	STEP 3	STEP 4
Quickly run through Express Setup	Install Ringcentral for Google Chrome Extension	Log in to RingCentral Chrome Extension using Google	Check out our Guide to learn how we can help you collaborate better with G Suite

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**, a window opens for you to enter three account security settings:

- Your password
- Your pin
- Your security question & answer

Passwords and Security Questions on your online account maintain your account's confidentiality and privacy. The PIN is used to verify your identity when checking voicemail or is requested by the automated attendant 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 by your administrator, your Express Setup will have different setup options.

3. 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.

4. 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

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

5. Create your **PIN**.

   Follow the requirements listed next to the **PIN** fields. A green check mark indicates when you have met a requirement.

   You'll need this PIN when contacting Customer Care or when checking voicemail.

6. Press **Continue**.

Your Account Security

Login

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

PIN: 6-10 digits

Confirm PIN: Please input the PIN again

Continue
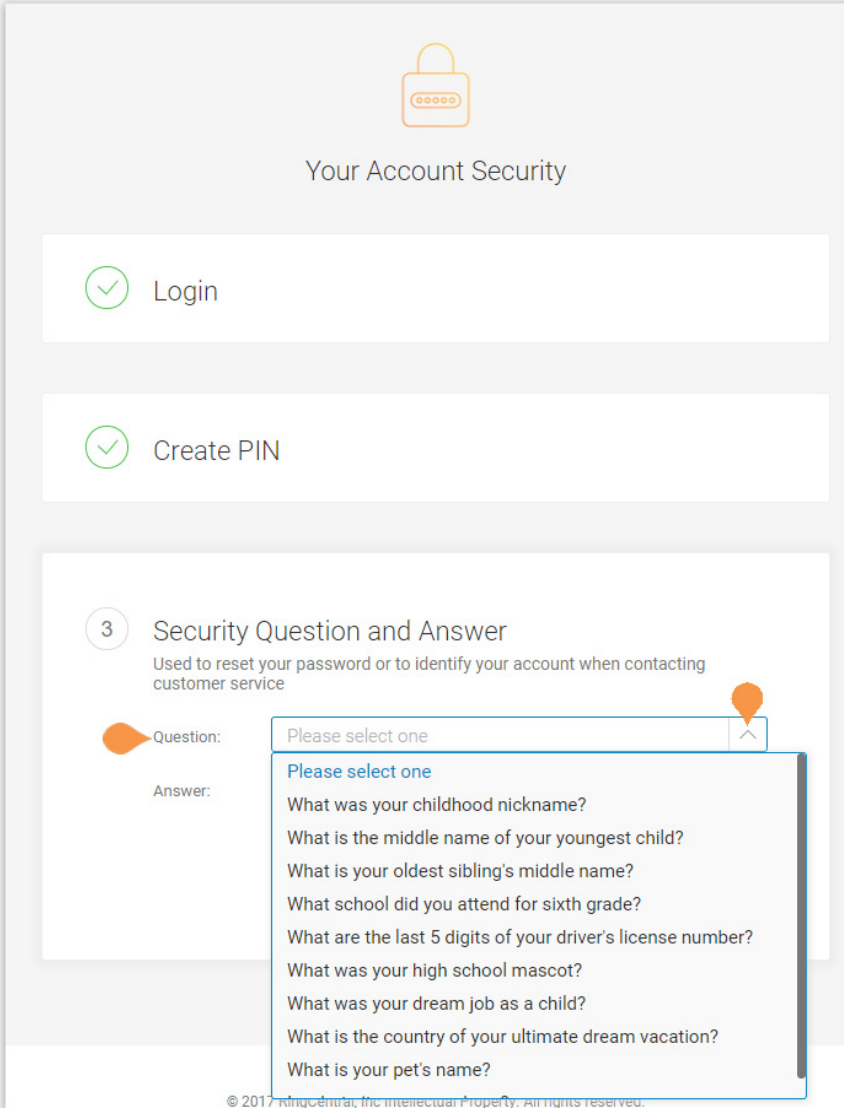
Pin Criteria
- Only digits
- Non repeating
- Non sequential
- Length 6-10 digits

3 Security Question and Answer

RingCentral®

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 Support. Keep a record of the question and answer for future reference.*

7. Select one of the questions listed in the **Security Question and Answer** menu.

8. Enter your answer to the security **Question** in the **Answer** field.
    Note: Your answer must be at least 4 letters.

9. Press **Continue**.

Your Account Security

✓ Login

✓ Create PIN

3 Security Question and Answer
Used to reset your password or to identify your account when contacting customer service

Question: Please select one ⌄

Answer:

Please select one
What was your childhood nickname?
What is the middle name of your youngest child?
What is your oldest sibling's middle name?
What school did you attend for sixth grade?
What are the last 5 digits of your driver's license number?
What was your high school mascot?
What was your dream job as a child?
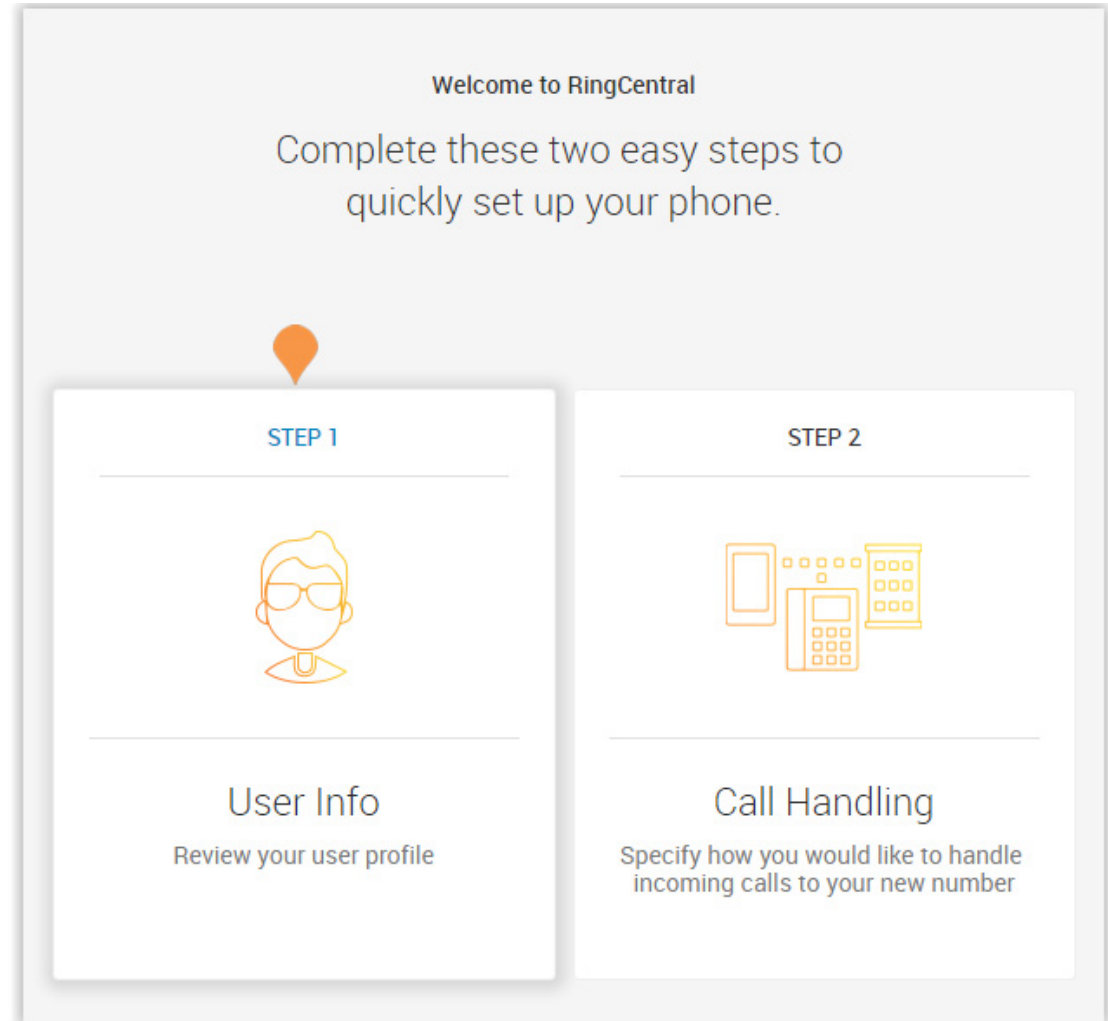What is the country of your ultimate dream vacation?
What is your pet's name?

Quickly Get Up and Running

The next two steps include reviewing your **User Info** and specifying **Call Handling** for incoming calls to your new number.
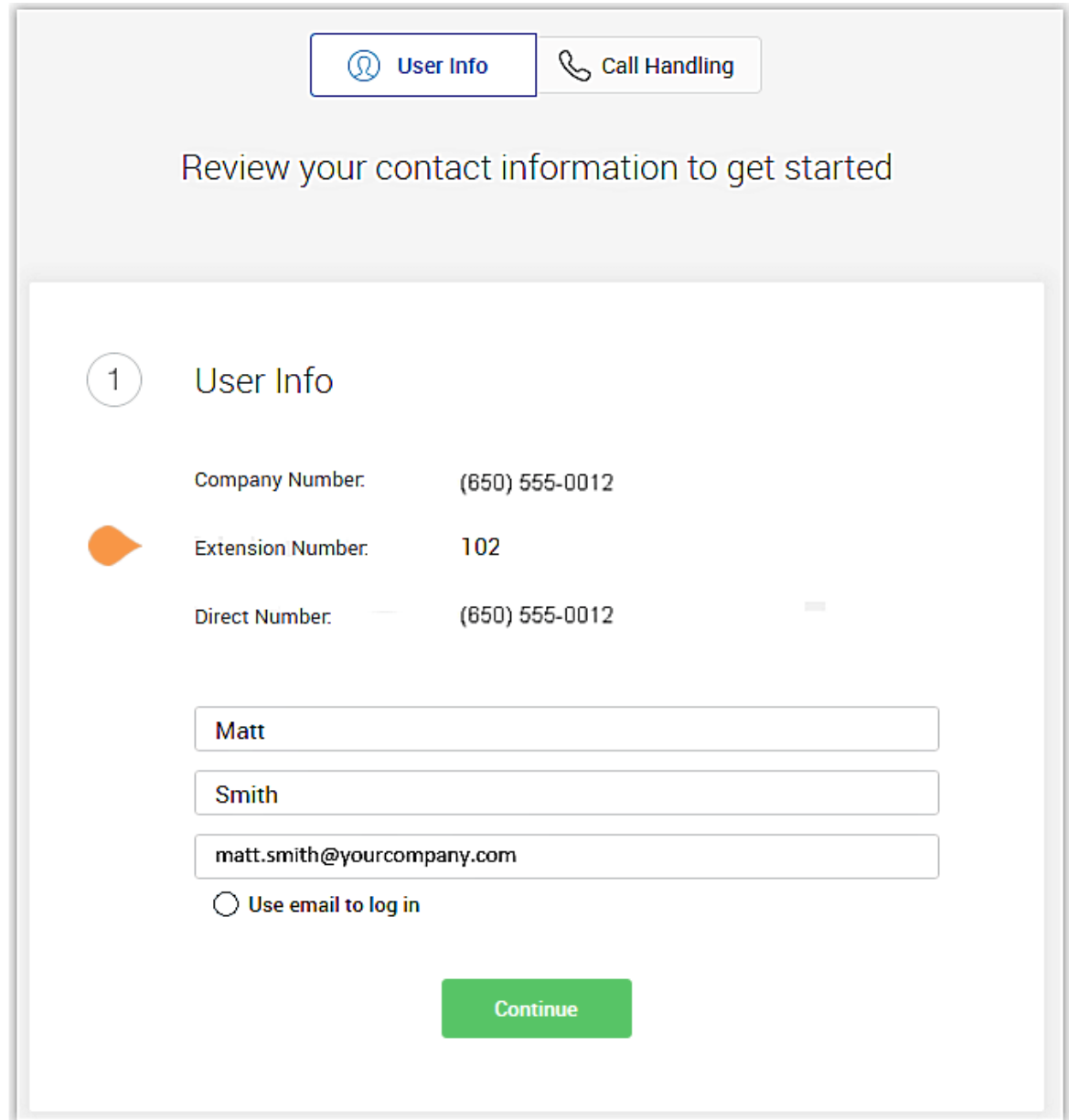
Review Your User Profile

1. Click **STEP 1**.
   Review your user profile.

Your **User Info** appears in a separate window.

2. Verify that your information is correct. If not, update your name or corporate email address.

- The name shown in your **User Info** will appear in your corporate directory for others in your company to contact you

- Select **Use email to log in** to enable login to your account using a unique corporate email address.

- Email functions only if your email address is unique in all RingCentral accounts.

3. Click **Continue**.

User Info	Call Handling

Review your contact information to get started

① User Info

Company Number:	(650) 555-0012
Extension Number:	102
Direct Number:	(650) 555-0012

Matt

Smith

matt.smith@yourcompany.com

○ Use email to log in

Continue

RingCentral®

Now check or reset your **Regional Settings.**

1. Verify **Regional Settings** specified for your account. These are: **Country**, **Time Format**, and **Time Zone**.

2. Click **Continue**.

User Info   Call Handling

Review your contact information to get started

User Info

2   Regional Settings

Country: United States (1)

Time Format: ● 12h (AM/PM)   ○ 24h

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

Continue

RingCentral®

Now check or reset your **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.

Important: You must provide a proper address or you will not be able to place calls using this number. Verify that your administrator updates this address every time you move your phone to a different physical location. If your administrator does not update this, emergency calls may not be routed to the appropriate responder for your current location.

1. Set the **Emergency Calling** - **Registered Location** for your account.
   - Enter your name
   - Enter your country
   - Enter your address
   - Enter your state
   - Enter your postal zip code
2. Read the agreement describing Emergency Calling - Registered Location.
3. Click **Agree and Continue**.

③ Emergency Calling - Registered Location 🖨 Print

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

Matt Smith

United States ⌄

7013 Fairway Drive

Apartment/Suite

Santa Rosa

California ⌄

94059

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

Call Handling

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.

1. You can either skip this step or set your phone to route your calls to another phone. To omit this step, click **Skip**. Then go to "Voicemail Setup" on page 16.

   - To add a device for call forwarding, click **Add Phones**.

- To add desk phones to which you can forward calls, click **Add Devices**.

Select additional devices (if any) you would like to ring when you receive an incoming call to your business number.

2. Select the type of phone to which the forwarded call will be sent.

3. Enter the number of the selected phone. Continue adding phones, as needed.

4. Click **Next**.

The setup instructions continue on the following page.

5. 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.

6. Click **Save**.

RingCentral

Voicemail Setup

Now, set up the message your callers will hear when RingCentral forwards your calls to Voicemail.

You can choose the default voicemail greeting "**Keep Defaults**" or you can select "**Customize**" to record or import your greeting. See the default greeting text shown below the playback button.

Changing the Voicemail Greeting

The next two pages explain how to keep the default voicemail greeting, or create a custom greeting by recording over the phone or importing a file.

To keep the default greeting, follow these steps:

7. Click **Keep Default**.

16

To keep the default, follow these steps:

8. Click **Save** and skip to **"Click Finish Setup"** page 18.
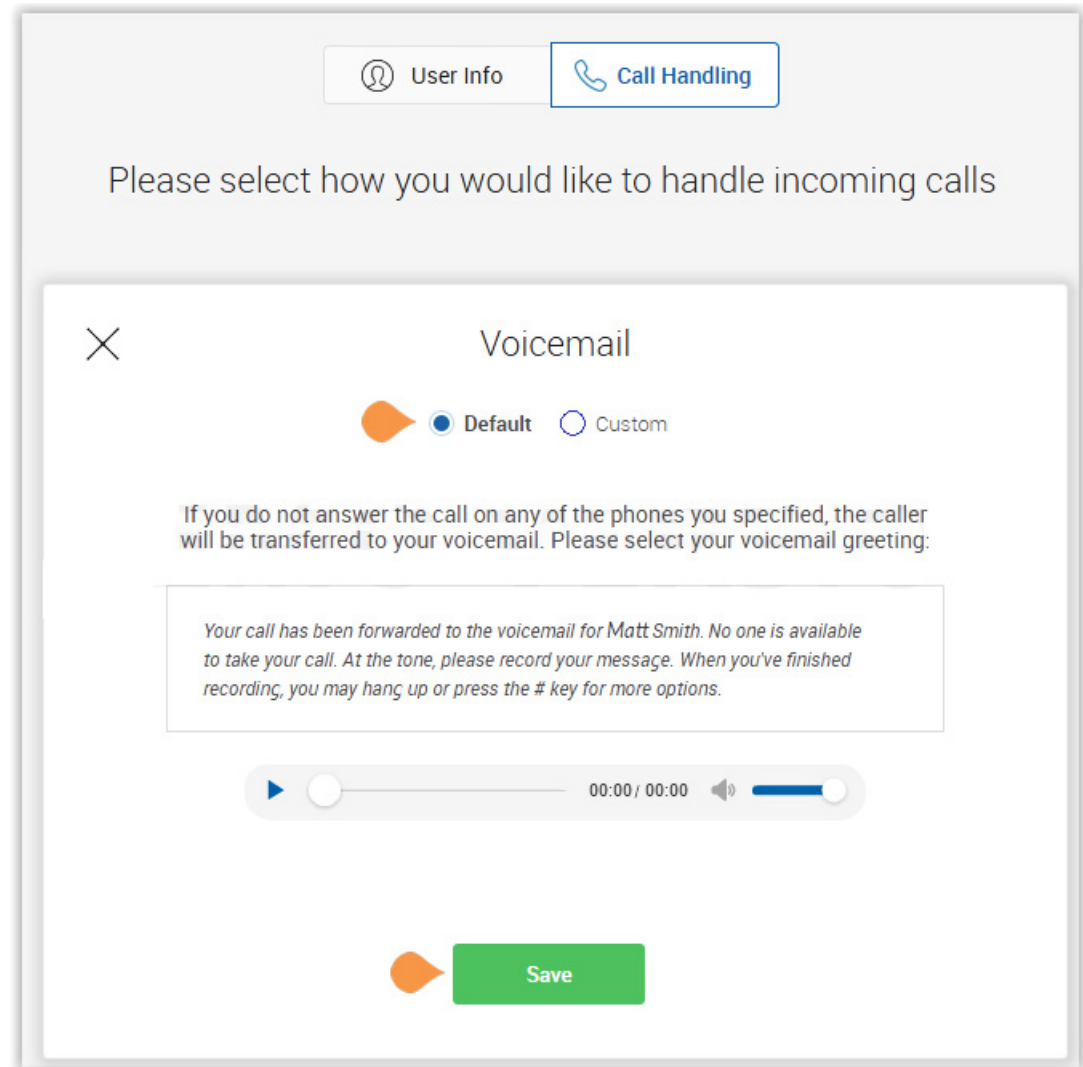
To RECORD OVER THE PHONE or Import a Custom Greeting

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

    You can record your greeting over the phone, or you can 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.)

10. Click **Save**.

You're almost done! The next steps are on the following pages.

11. Click **Finish Setup**.

User Info

✓

Name: Pamela Smith
Company: (650) 555-0012
Ext: 103
Direct: (650) 555-0012

Change

Call Forwarding
Sequentially

✓

Polycom VVX311
(650) 555-0012

Home
(650) 555-0012

Change

Voicemail
Custom

✓

[Custom Recording]

Change

Finish Setup

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 the RingCentral applications.
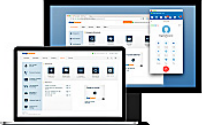
- For more information about apps you can use with RingCentral Office, see the *RingCentral Office User Guide*.

- To download apps from the RingCentral website, see Downloads.

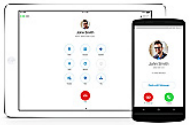12. Click **Finish**.

Continue to the following page.

Congratulations!

You have completed the initial setup of your RingCentral business phone system.

13. Note the phone number shown on the **Congratulations** screen.

14. Click **Go to My Account**.

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

Congratulations!

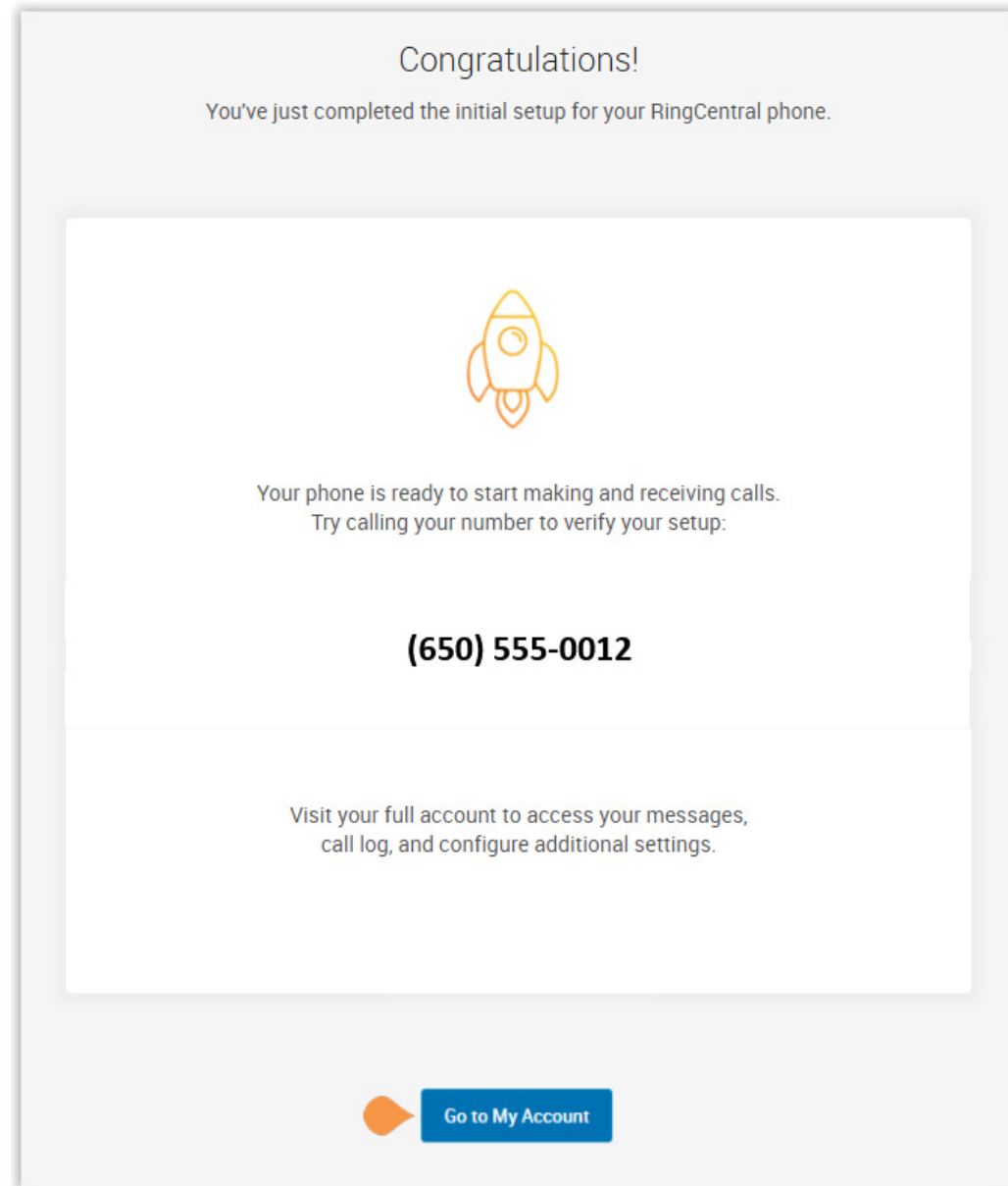You've just completed the initial setup for your RingCentral phone.

Your phone is ready to start making and receiving calls.
Try calling your number to verify your setup:

(650) 555-0012

Visit your full account to access your messages,
call log, and configure additional settings.

Go to My Account

RingCentral®

Overview Page

Your RingCentral Office Overview page opens. Take a short tour of your Overview page.

1. **Overview** page is your dashboard to the RingCentral system.

2. **Recent Messages** and **Recent Calls** lists your recent incoming and outgoing messages and calls.

3. **Shortcuts** are menus to frequently accessed settings.

4. **Announcements** lists messages from RingCentral.

5. **Resources** provides quick access to Community, Blog, and Feedback. Go to Feedback to report an issue with RingCentral Customer Care.

6. **Get Help** lets you find answers to most of your questions, request Support, see service status messages, or toggle on/off feature tips.
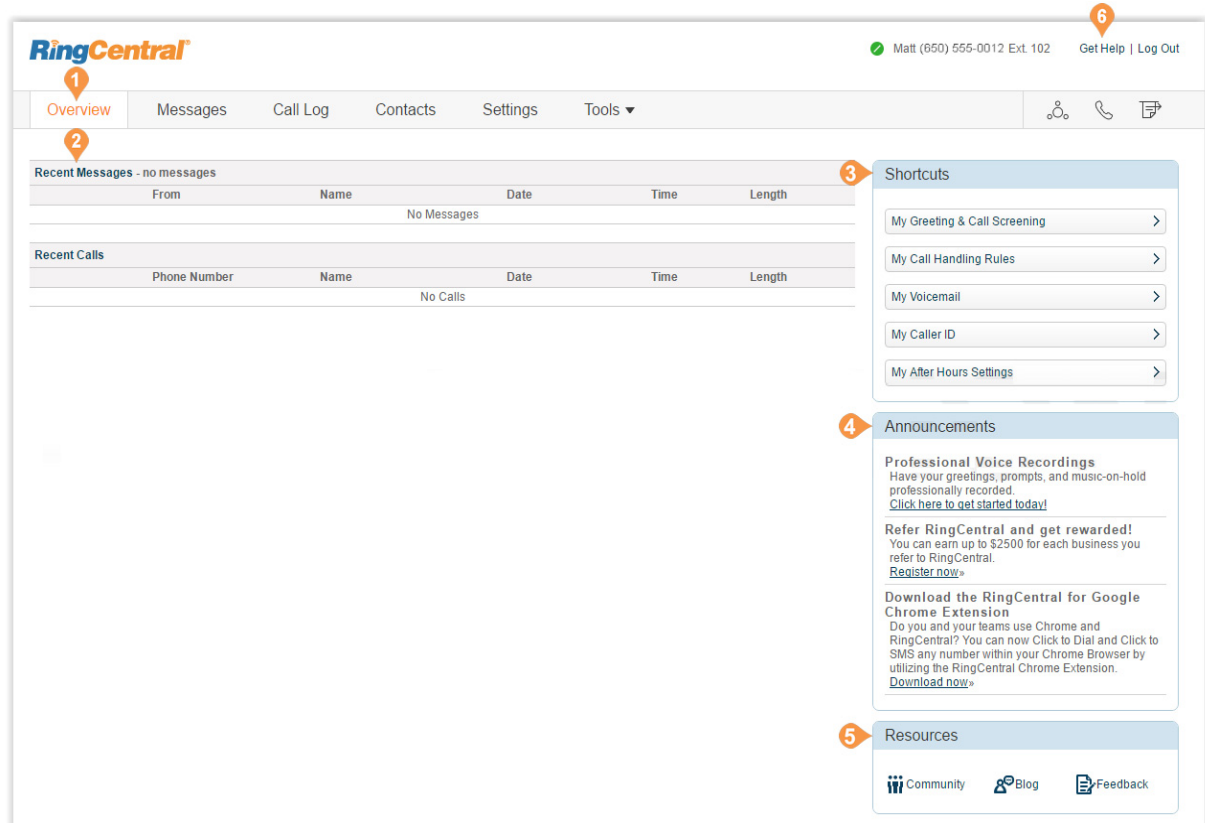
To Find Information About
- Your **User Details**, click the **Settings** tab.
- The *RingCentral Office User Guide*, click here.
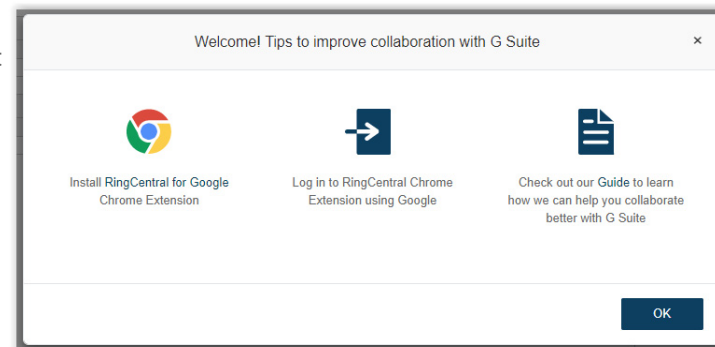- Support **Videos**, click here.

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.

You may also see information about these available applications.

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.

Access Your Account

How to Access 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

If configured by the admin for your account, users can 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 at the bottom of the screen and enter your email address on the following screen, then log in with your corporate credentials.

Account Validation

Account Validation is a security feature that helps protect against fraudulent activity on your account. You will be asked for a security validation code when you log in from a new or unrecognized computer for the first time. Depending on your account settings, you will need to check your phone or email for the security code and enter it in the box before logging in.

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Logging In

You can log in to your RingCentral account by using a corporate email account or by using a Google account.

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, RingCentral Glip, endpoints such as RingCentral Phone, integration applications, and the Multiple Account Access portal. This feature can also be configured during Express Setup of your RingCentral account.

To Log In using Email as User ID
1. In the login screen, enter the unique **Email** address that has been associated with your RingCentral account.
2. Click **Next**.
3. Enter your password.
4. Click **Sign In**.

RingCentral®

Sign in

Email or phone number

Next

Or sign in with

G Google   ⊖ Single Sign-on

New to RingCentral? Sign up here

RingCentral®

Sign in

dave.richards@example.com

Password

☐ Stay signed in

Back   Sign in

Forgotten password?

New to RingCentral? Sign up here

RingCentral®

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.
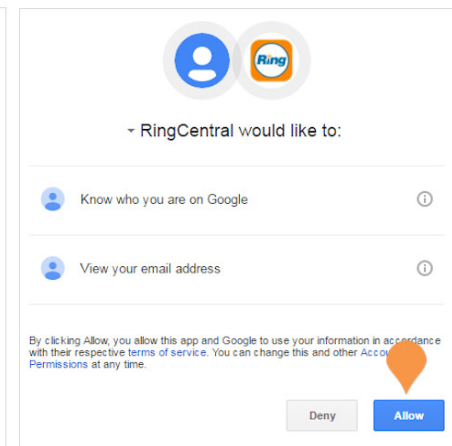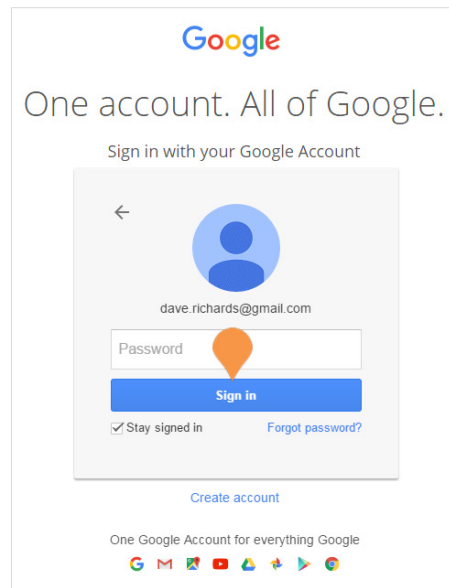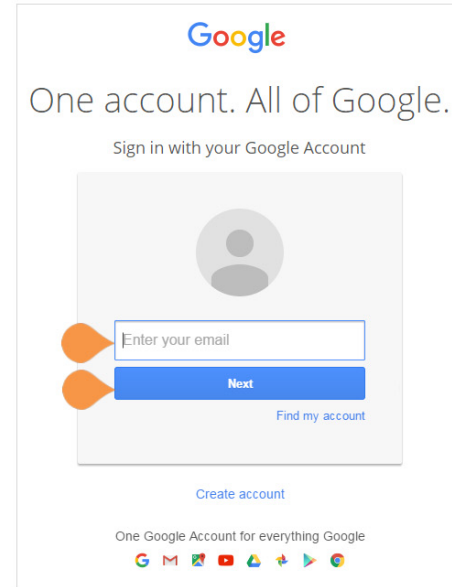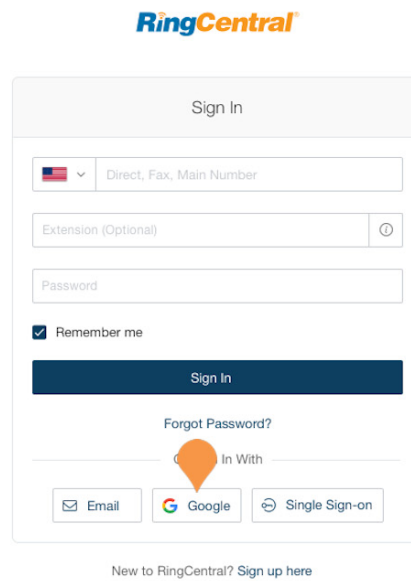
RingCentral for Google Chrome Extension

Increase your productivity by handling everything without leaving Google. With the RingCentral for Google Chrome Extension™, make RingCentral calls directly from Gmail™, Google Calendar™, or your Chrome browser. RingCentral for Google Chrome Extension is available to all RingCentral Office customers.

Use the RingCentral dial pad to manually dial a number or click any phone number in your contacts, emails, G Suite applications, and Chrome browser. RingCentral RingOut® will connect the call. Schedule online meetings and audio conferences, and they'll appear on your Google Calendar. Create Hangouts with up to 1,000 audio participants—all without leaving the Chrome browser.

Requirements
- Windows® XP (or later) or Mac OS X® 10.8 Mountain Lion (or later) operating systems are required.
- Google Chrome™ 30 (or later) is required.
- To utilize Google Login, your Google email must be associated with your RingCentral account.

Install the RingCentral for Google Chrome Extension
1. Install the extension from the Chrome store.
2. Ensure the extension is enabled in Chrome browser.

Use your RingCentral dial pad to click to dial or click to call numbers within your G Suite applications.

As a RingCentral customer, you can click to dial or click to SMS phone numbers displayed in your Chrome browser.

Dial numbers manually with the dial pad, or click to dial any number in your contacts or email messages.

Create a RingCentral meeting, and the details will appear in your Google Calendar automatically.

Transform Hangouts into a hub for up to 1,000 audio participants.

Using Your Account

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 users set up and access the following RingCentral features:

- Messaging
- Call Log
- Contacts
- Integrations
- RingCentral Phone
- RingCentral Meetings
- Audio conferencing
- RingOut
- FaxOut
- Presence
- Intercom
- User Greetings
- Audio and Hold Music
- Call Handling and Forwarding
- Call Flip
- Hot Desking
- Notifications
- Outbound Caller ID
- Corporate email as user ID
- Gmail (or G Suite) email as user ID
- RingCentral for Google Chrome Extension

Overview Page

The Overview Page is your account homepage. It shows your recent voicemail, faxes, and inbound and outbound calls. Let's take a look at the navigation bar across the top of this page and see how to use it. Some features are described in more detail later in this document.

Note: The pages discussed in this section of the guide can be found under My Extension. Admin users will see the tabs at the top for My Extension and Admin Portal. Users will only see My Extension and will not have the option to switch to an Admin Portal.

Messages

Your voicemail and fax messages are stored here. Under Messages, you can:

- Review inbound and outbound callers
- Listen to voicemail
- View faxes
- Save voicemail and received faxes to your computer
- Forward messages and faxes by email
- Click on a caller's number to call them back
- Delete and undelete items
- Block caller

Under the Open column, you will see symbols for the following types .of messages:

Voicemail: Hover over the Voicemail and Play symbols to hear the message

Fax: Hover over the Fax and Eye symbols to view a preview of the fax cover page.
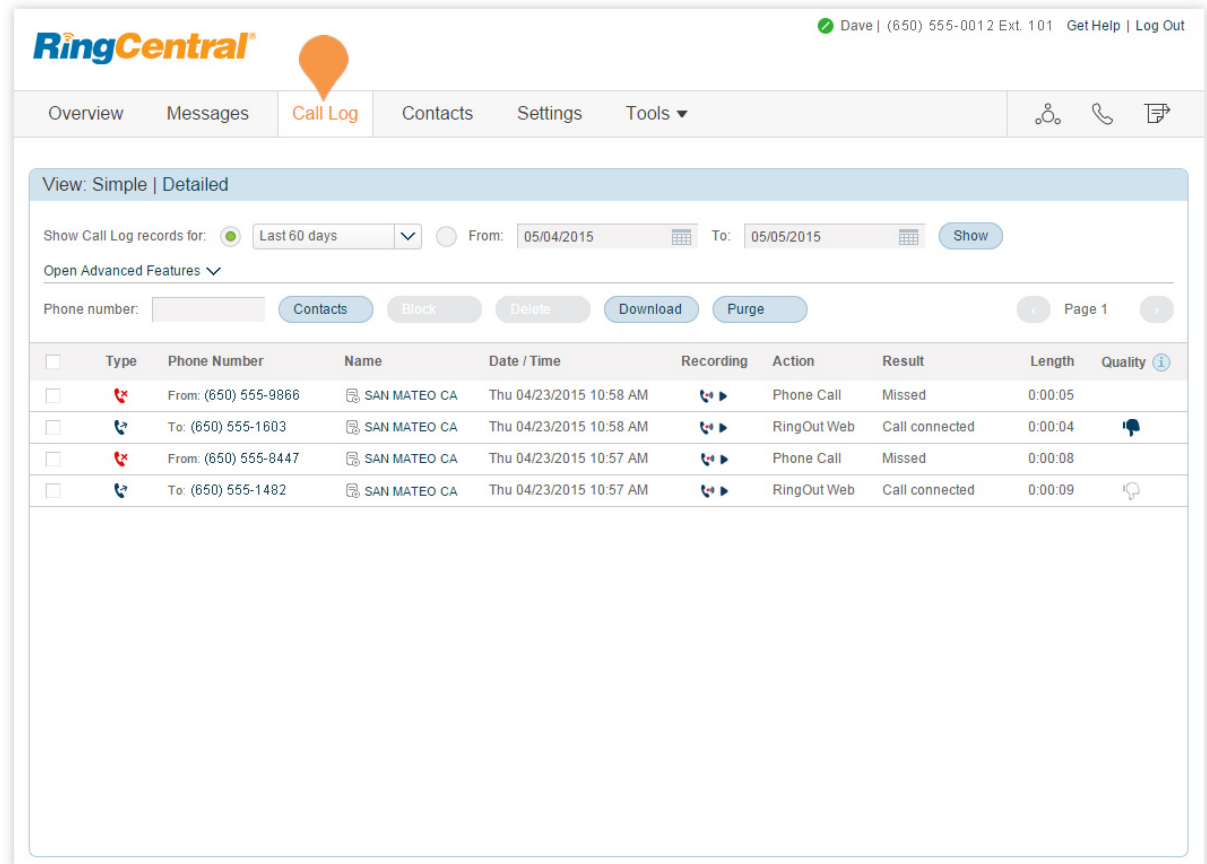
Call Log

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

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

    Inbound Call

    Outbound Call

    Missed Call

If your administrator has enabled it on your account, you will have a Quality column in your Call Log. By default, the feature is disabled. If this feature is enabled, and you were not satisfied with the call quality of a connected call, you can mark the thumbs down icon in the Quality column in your Call Log.

    Click to mark as a bad call.

    Marked as a bad call.

Contacts

Contacts include Company contacts, which are all the users in your RingCentral system. It also includes your Personal contacts, which you can add manually or import from a comma-separated variable (CSV) text data file or from Microsoft Outlook®.

User Settings

Click the Settings tab at the top of the homepage to access your Settings page. On the Settings page, you will see options for your user extension: Phones & Numbers; Screening; Greeting & Hold Music; Call Handling & Forwarding; Messages & Notifications; and settings for outbound calls or faxes: Outbound Caller ID, and Outbound Fax Settings.
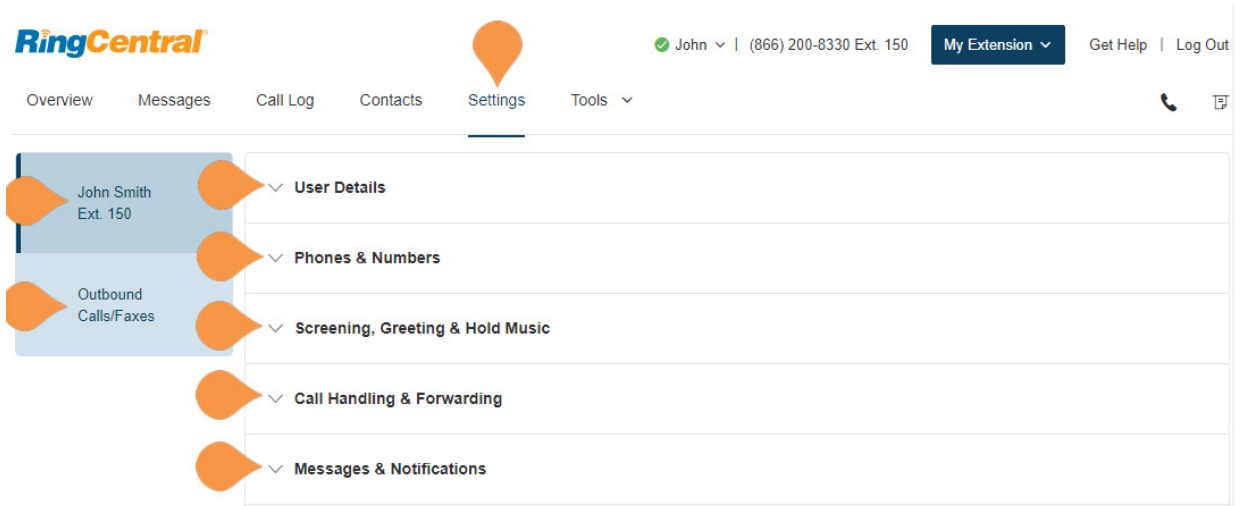
Tools

This section allows you to obtain the latest tools to enhance your productivity and customize your service to suit the way you work.
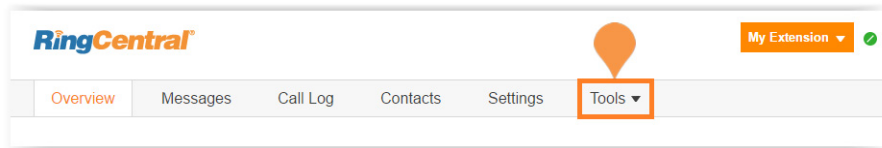
What's New

Check out the latest updates and features in your RingCentral phone system.

Mobile Apps

Download the RingCentral Phone app for iPhone®, Android™, or iPad® to take your RingCentral service on the go.

Desktop Apps

Use RingCentral Phone to control your calls from your PC or Mac. Send and receive text messages, faxes, and answer or screen incoming calls, send to voicemail, transfer, disconnect, or monitor voice messages as they are being left and pick up the ones you want to talk to.

Meetings

RingCentral Meetings is an online meeting solution. Share documents, websites, and files from cloud storage; annotate, chat, and even record your meetings. Collaborate with up to 200 people (including the host) to share and contribute anywhere, anytime, from any device. View reports of meeting usage to optimize your use of RingCentral Meetings.

Archiver

RingCentral Archiver lets you securely save your messages and recorded calls automatically. RingCentral Archiver integrates with SFTP or Dropbox to allow you to easily search the stored data at any time from within your SFTP or Dropbox cloud storage account to quickly retrieve the records.

App for Salesforce

RingCentral for Salesforce enhances your Customer Relationship Management (CRM) experience with integrated business communications. This app is available only for RingCentral Office Premium and Ultimate customers. This app requires that your company's administrator enable users from Salesforce.

App for Zendesk

RingCentral for Zendesk provides seamless integration of your Zendesk application and your RingCentral services to enabled improved customer retention, greater agent productivity, and advanced business processes. This app is available only for RingCentral Premium and Ultimate customers. This app requires that your company's administrator enable users from Zendesk.

Authorized Apps

Allows you to track what RingCentral apps are connected to your account. Easily manage a wide range of apps' authorization, including Glip, RingCentral Phone, RingCentral Meetings, RingCentral integration apps, and apps from the RingCentral App Gallery.

Tell a Friend

Refer a friend to RingCentral using this simple form and receive referral rewards.

RingMe

The RingMe button gives your customers the ability to call you by clicking on the button on your website or email signature.

RingCentral®

What's New

Check out the latest updates and features in your RingCentral phone system.

RingCentral®

February Feature Release

Now here! Take a look at our latest release of useful new features and upgrades for you and your workforce, available with your RingCentral account.

RingCentral Live Reports

RingCentral Live Reports provides insights into how you are treating your customers and how your agents are performing. Live Reports provides a widget-based dashboard of real-time and historic data to help smaller teams manage their customer experiences and drive agent performance. Learn more about RingCentral Live Reports.

Contact your RingCentral account manager for how you can get Live Reports.

RingCentral for Desktop Updates

Update your RingCentral for Desktop app

To ensure optimal service, please ensure that all users update their RingCentral for Desktop applications to the latest version by February 28, 2017. **Note that versions older than 8.3.6** will be retired and will no longer work after this date. Download for Windows or Mac.

Enable users to install and update RingCentral Desktop app without admin help

Now you can grant your users permission to install and update the RingCentral Desktop app on their Windows PC without requiring administrator credentials. System administrators can turn this feature on in the Administrative web portal. Learn more.

New Ways to Stay Organized

Active Directory integration

RingCentral®

Mobile Apps

With the RingCentral Phone app, you have the convenience and power of your entire business phone solution in the palm of your hand. Easily navigate the interface to take calls, check messages, send business texts, adjust settings, and more—from virtually anywhere.

To download the RingCentral Phone app, visit the iTunes App Store for iOS or Google Play Store for Android.

See the RingCentral Phone App Guide for more details.

RingCentral Phone

RingCentral Phone turns your PC or Mac computer into an all-in-one communication hub completely synced to your office network so you can collaborate with your colleagues and clients anywhere you have a broadband connection and a headset. With RingCentral Phone, you're ready to communicate as soon as you log in to your computer, no matter where you are.

RingCentral Phone combines the call handling power you expect from your desk phone with the collaboration tools you rely on most—like texting, conferencing, and faxing—so you can stay productive with fewer devices to worry about.

RingCentral Phone is easy to install and even easier to use.
1. From the **Tools** tab, select **Desktop Apps**.
2. Click **Download for Mac** or **Download for PC**. The file will download in your browser.
3. Follow the prompts in the **RingCentral Setup Wizard**.

See the RingCentral Phone Quick Reference Guide and the RingCentral Phone User Guide for more details.

RingCentral Meetings.

RingCentral Meetings* is a downloadable app for video conferencing and web sharing of the desktops and application displays of conference participants. The app is available in desktop and mobile versions. A plugin for use with Microsoft Outlook is also available.

Participants are invited to join a meeting by email or SMS; they don't have to be RingCentral customers but can download and run the RingCentral Meetings app for free and join your meetings without needing to create an account or log in. You can access Meetings Reports for usage data.

To download the RingCentral Meetings app for your desktop:

1. From the **Tools** tab, select **Meetings**.
2. Click **Meetings for Desktop**.
3. Click **Download for Mac** or **Download for PC**. The file will download in your browser.
4. Follow the prompts in the **RingCentral Meetings Setup Wizard**.

To download the RingCentral Meetings app for mobile:

1. Download on the **App Store** or **Google Play**.
2. Follow the instructions for installation through the iTunes App Store for iOS or Google Play Store for Android to download the Meetings app for your mobile devices.

To download the RingCentral Meeting Plugin for Outlook:

- Under **Meetings Outlook Plugin**, click **Download for Mac** or **Download for PC**.

See the RingCentral Meetings Quickstart Guide and the RingCentral Meetings User Guide for more details.
*Available only with select Office plans.

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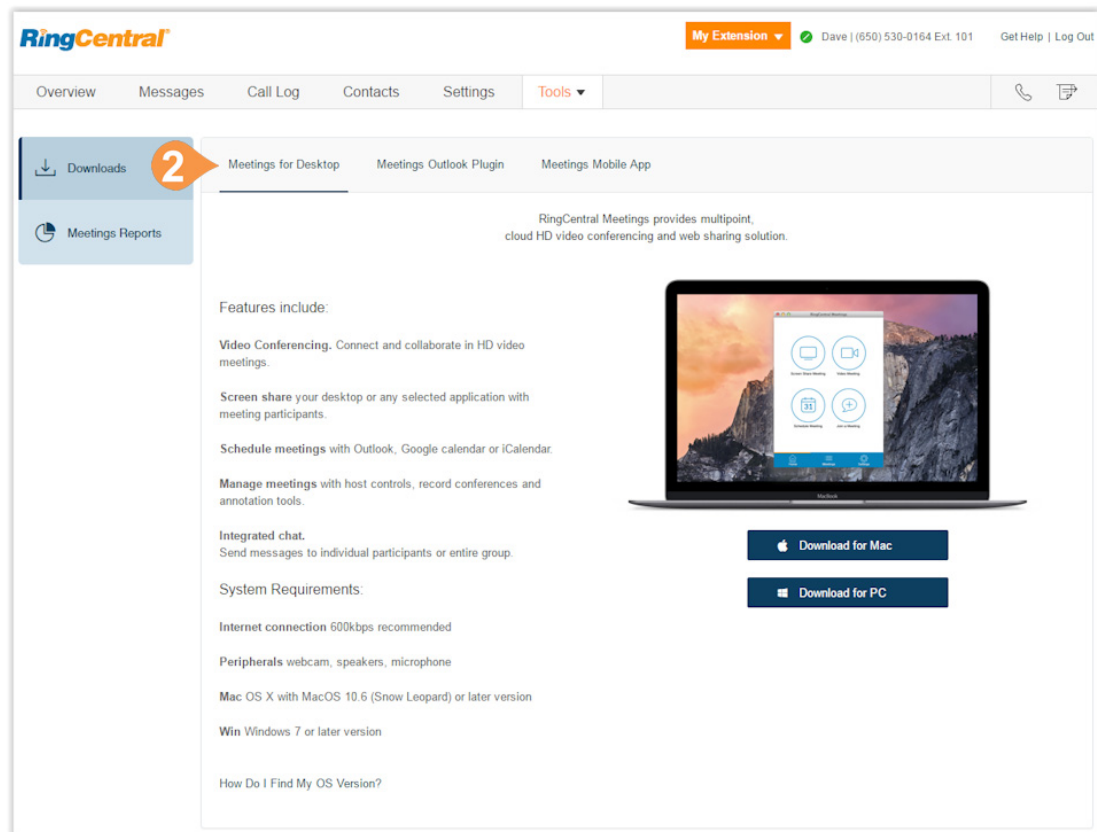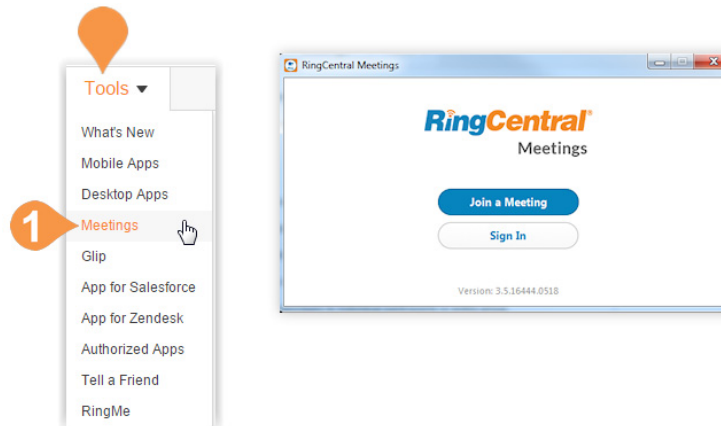
Archiver

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 **My Extension**, 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

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RingCentral for Salesforce*

RingCentral for Salesforce enhances your CRM experience with integrated business communications. With RingCentral for Salesforce you can place calls from within Salesforce by simply clicking on contact or account records. Your incoming calls trigger a pop-up window with the caller's account information. You can attach call notes to specific contact records. Your RingCentral administrator will need to configure this app for your account, and this app requires that your company's administrator enable users from Salesforce.

See the RingCentral for Salesforce User Guide and the RingCentral for Salesforce Admin Guide for more details.

RingCentral for Zendesk*

RingCentral for Zendesk seamlessly combines the features of the Zendesk application and your RingCentral services. With the RingCentral for Zendesk, you can enhance your Zendesk experience with one-click dialing through your RingCentral phone system, screen-pop features, multiple browser tabs for multiple interactions, and more. Your RingCentral administrator will need to configure this app for your account, and this app requires that your company's administrator enable users from Zendesk.

See the RingCentral for Zendesk User Guide and the RingCentral for Zendesk Admin Guide for more details.

Integration Solutions

RingCentral also offers other integration solutions with Google, Microsoft, Desk.com, and more. Visit our website at ringcentral.com/office/integrations/overview.html for more details.

*Available with RingCentral Office Premium and Ultimate editions.

Authorized Apps

The Authorized Apps Manager allows you to track what RingCentral apps are connected to your account. You can easily manage a wide range of apps' authorization, including Glip, RingCentral Phone, RingCentral Meetings, integration apps (such as Office 365, Google, SalesForce), and apps from the RingCentral App Gallery. It provides better security management to reset authorization, if necessary.

Access the Authorized Apps manager:
1. Select My Extension.
2. From the **Tools** tab, select **Authorized Apps**.
   A list and description of your available apps is displayed.
3. Remove the authorization from the selected apps.

RingMe

RingMe is a click-to-call feature designed to help drive traffic from your website or email to your telephone sales team and thereby increase lead opportunities. Whether you are using a local or a toll-free number, you can provide your visitors a way to call you with a simple click of the mouse.

1. From the **Tools** tab, select **RingMe**.
2. Next to **Callers will be routed to**, select your preference from the drop-down menu.
3. Under **RingMe Style**, select whether you'd like a hyperlink or a button. If choosing a button, click **> Change Button Style** to see other color options.
4. Under **Security**, check the boxes if you'd like to **Use SSL mode** and **Require callers to enter security image confirmation code**.
5. Under **Generate Code**, choose the type of code you'd like from the drop-down menu.
6. Click **Copy Code** to copy your code to your computer's clipboard. Then paste the code wherever you'd like to add your RingMe button.

Do Not Disturb

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

Click the icon to toggle between statuses:

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

Audio Conference

RingCentral customers can set up, host, and join conference calls anytime, anywhere. Click the Conference icon in the upper right corner of your online account to invite participants. 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 whenever you want.

Each conference call can include up to 1,000 attendees, enabling you to hold large meetings and broadcasts.

You also have the option to add the international dial-in number in the invitation. Check the "I have international participants" option and select the needed countries in the list.

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

Launch the Conference Application

1. Click the **Conference icon**.
2. A pop-up will appear with conference numbers and settings.
   a. View **Dial-in numbers**.
   b. View **Host** and **Participant** codes.
   c. If you have international participants, check the box next to **I have international participants**. 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 prepopulated conference details—enter participant emails and send.
   f. Click **Conference Commands** to view Conference Commands.*
3. Click **Close**.
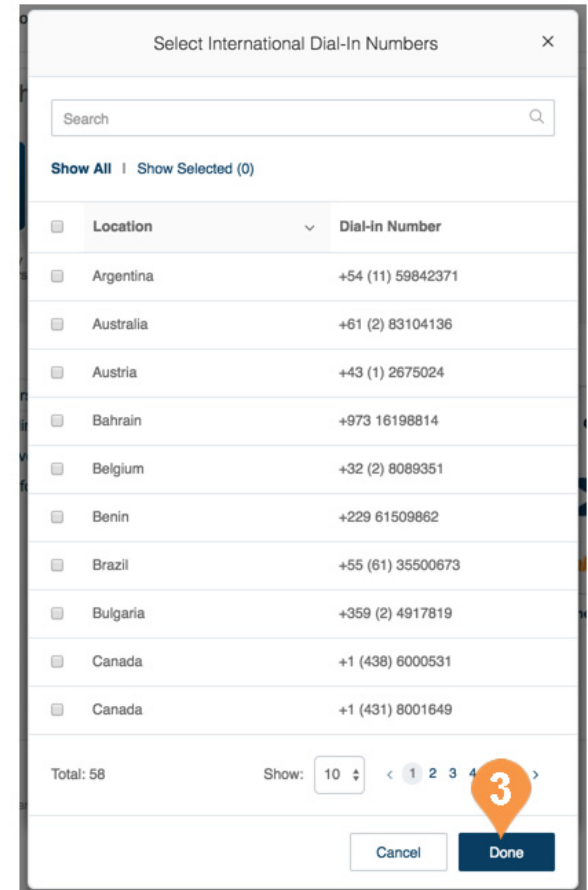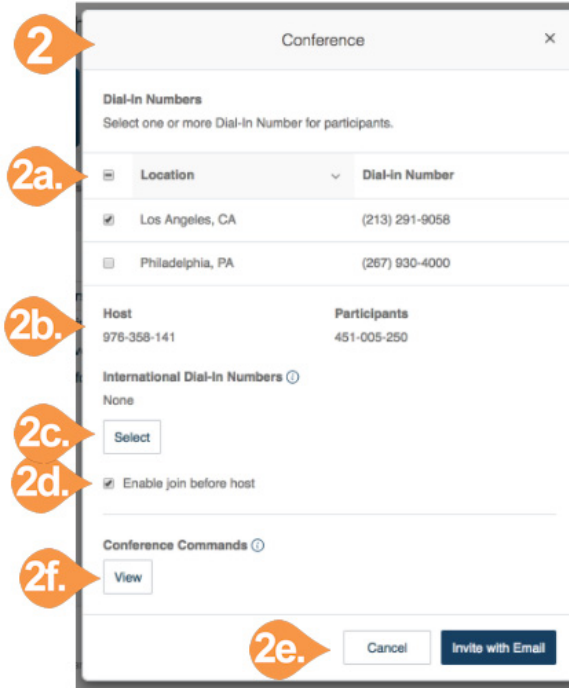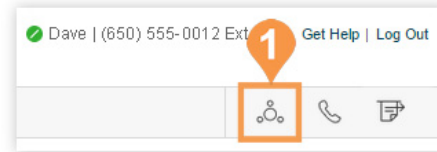
Conference Commands

The Host has the full call control and can access all features through the conference commands in the table to the right.

Participants, on the other hand, have limited control of the conference commands, but can join the conference without a host.

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

Conference

Dial-In Number:	+1 (760) 569-7171	
Host:	324-642-603	
Participants:	162-321-301	

☑ I have international participants ⓘ

☑ Enable join before host

Select International Dial-In Numbers

🔍

☐ Argentina	+54 3814085011
☐ Australia	+61 386720111
☐ Austria	+43 12650505
☐ Bahrain	+973 16568305
☐ Belgium	+1 (323) 294-1165
☐ Brazil	+55 2123914719
☐ Brazil	+55 2123911541
☐ Bulgaria	+359 (2) 437-2638
☐ Canada	+1 (647) 499-8281

Invite with Email

Conference Commands ❯ ⓘ

Use this command...	To do this...
* # 2	**Caller Count:** Keep track of how many people are on the call
* # 3	**Leave Conference:** Lets the host hang up and end the call
* # 4	**Menu:** Listen to the list of touchtone commands
* # 5	**Set Listening Modes** • 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	**Mute Host Line** • Press once to MUTE • Press again to UNMUTE
* # 7	**Secure the Call** • Press once to BLOCK all callers • Press again to OPEN the call
* # 8	**Hear sound when people Enter or Exit call** • 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	**Record your conference** • Press once to START recording • Press again to STOP recording

Close

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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. 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 protects you in case you mistyped your own number, or if your voicemail picks up too quickly.
7. Click the **Call** icon. The system first calls you. When you answer (and press 1 as instructed if you've selected this option), it then calls the other number and connects you.

FaxOut

From any page on your RingCentral 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.

A wide variety of standard document types, including word processing and spreadsheet and PDF documents, are recognized by FaxOut.

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 and add a cover page message.
3. **Attach files** from Dropbox, Box, Google Drive, or your computer and authorize RingCentral to access your files (you have to do this only once).
4. Click **Send Now**.

Placing Video Calls

Your admin can enable video on internal point-to-point calls in your RingCentral Office account. Supported devices include the Polycom 501/500 and VVX 601/600. Some devices support detachable cameras for video calling.

You can control video-enabled phones through a softkey. The softkey displays "Audio Mode" in the idle state when the video feature is enabled on your RingCentral Office service. You can use the softkey to toggle between 'Audio Mode' (to make an audio-only call) and 'Video Mode'.

Hot Desking

Hot desking enables you to log in to a shared phone that adopts your phone settings. Hot desking allows employees who travel from different offices to share the same common phone and desk while keeping their own extension profiles and voicemail access.

Hot desking is only available for extensions with digital lines. Host phones will not support any inbound or outbound calling without a guest user logged in (except emergency calls).

Log in to a Hot Desk Phone
1. Press the **Login** soft key (or dial *90) on a hot desk phone.
2. At the prompt, enter the extension number and a pin (used at set up).
3. You are logged in to the hot desk phone.

Log out from a Hot Desk Phone
1. Press the **Logout** soft key on the phone (or dial *90) to log out.
2. You are logged out from the hot desk phone.

My Extension Settings

My Extension Settings

As a user, you may be able to change your contact info, voicemail greeting, call handling, user hours, password, and more, but not the extension number that was assigned to you by the system administrator.

Your administrator may use the Roles and Permissions feature to control which settings users can access or edit. A role is a set of permissions that is assigned to a user. If some settings described here are not available to you, your administrator may not have granted you a role with permissions that can access or edit those particular settings

Setting User Details

1. From the **Settings** tab, select your name and extension at the top of the list of settings on the left.
2. Under **User Details,** select and change the information you want to change on the **General** tab.
   a. **First Name**.
   b. **Last Name**.
   c. **Record User Name**: Use RingCentral text-to-speech name to create a phonetic spelling of the user/extension name so the system can pronounce it correctly. Or click **Edit** to speak or import the correct pronunciation. See "Set a Custom Name Recording." on page 59.
   d. **Contact Phone**.
   e. **Mobile Phone**.
   f. **Email**: Use this address for RingCentral communications. If your RingCentral account is enabled for Google G Suite, enter a valid Google email address.
   g. **Use email to log in**: Enables your admin to enable you to log into your RingCentral account

using your corporate email address and password.

h.   **Department**: Add your department title.

i.   **Status**: Indicates if your account is enabled.

j.   **Password**: Set and reset password, PIN, and Security Question.

3.   Select and change the information you want to change on the **Settings & Permissions** tab.

a.   **Regional Setting**: Time zone, time format, country code.

b.   **User Hours**: Set your working hours.

c.   **Roles**: Lists the role assigned to you by your admin that controls what you can do within the system. A role is a collection of permissions that could be based on a job function.

d.   **User Groups**: Specifies any user groups where you are a member. The user group manager can modify your settings and view your call log.

e.   **Template**: Click to **Apply** an existing template (group configurations) for call handling.

f.   **Schedule Meetings for Me**: Grant permission to other users in RingCentral Meetings to schedule a meeting on your behalf.

Schedule Meetings for Me

Schedule Meetings for Me simplifies the process of scheduling RingCentral meetings without the need to log into different accounts to host meetings for others. For example, a manager can assign his/her executive assistant to schedule meetings for them.

1. From the **Settings** tab, select your name and extension at the top of the list of settings on the left.
2. Click the **Settings & Permissions** tab.
3. Click **Schedule Meetings for Me**.
4. Select the boxes of the users you want to grant permission to schedule meetings for you.
5. Click **Save**.

When scheduling a meeting in RingCentral Meetings, the host can select your name from the **Schedule for** field in the **Schedule a Meeting** window. See the RingCentral Meetings Guide for information on scheduling meetings.

RingCentral®

Use Text-to-Speech Name

1. From the **Settings** tab, select your name and extension at the top of the list of settings on the left.
2. Select **User Details**.
3. Click **Edit** under **Record User Name**. A pop-up will appear with options for your recorded name.
4. Select **RingCentral text-to-speech name** from the menu.
5. Enter your name in the **Greeting Name** field.
6. Click **Save**.

RingCentral®

● John ∨ | (866) 200-8330 Ext. 150 My Extension ∨ Get Help | Log Out

Overview   Messages   Call Log   Contacts   Settings   Tools ∨

1   John Smith
     Ext. 150

2   ∧ User Details

     General   Settings & Permissions

First Name   **Record User Name** ⓘ
John   John Smith (Default)

                                        3   Edit

Last Name
Smith
                                        Record User Name   ×

Department   **Record by**
                                    4   RingCentral text-to-speech   ▼

Mobile Phone   **Greeting Name**
                                    5   John Smith
                                                                    6
                                                    Cancel   Save

Outbound
Calls/Faxes

Status   **Password**
Enabled   Change Password

☑ Yes, I would like to receive information on product education, training materials, etc

                                                            Cancel   Save

RingCentral

Set a Custom Name Recording.

1. From the **Settings** tab, select your name and extension at the top of the list of settings on the left.
2. Select **User Details**.
3. Click **Edit** under **Record User Name**. A pop-up will appear with options for your recorded name.
4. Select **Record my name** from the menu.
5. Select how you'd like to set your custom recording:
   a. Record Over the **Phone**
      Next to **Call me at**, enter a phone number in the text field. Click the Call Now button, and RingCentral will call you to record your message.
   b. 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 through your computer microphone. Stop the recording and listen to the playback.
   c. **Import**
      Browse for a WAV or MP3 file you want to use. Click **Attach**. Click the play button to listen to your greeting.
6. Click **Save**.

Phones and Numbers

Phones and Numbers

In the Phones & Numbers section, you can view your phones and numbers, edit your presence and intercom settings as well as view your conference numbers and invite people to a conference call via email.

Setting Phone Details

1. From the **Settings** tab, select **Phones & Numbers**.
2. Click the **Phones** tab.
3. Click **Edit** to see the phone details of a phone. You can view your **Device**, **Serial Number**, **Assignee Type**, and **Status**, edit your phone **name**, your **Default area code**, your **Bandwidth Settings** and enable **HD Voice***, and edit your **Emergency Address**.
4. Click **Save**.

*Available for Office Premium and Ultimate users only.

Set Your Presence

Presence-capable phones have status indicator lights that let you see who is available, busy, or on hold. You can turn on Presence and decide who gets monitored and how you want to handle the calls.

1. From the **Settings** tab, select **Phones & Numbers**.
2. Click the **Phones** tab.
3. Click **Presence**. A pop-up will appear with a list of users who are currently able to see your **Presence**.
4. On the **Appearance** tab, check the box next to **Ring my phone when any user I am monitoring rings** if you'd like to use this feature**.**
5. Check the box next to **Enable me to pick up a monitored line on hold** if you'd like to use this feature.
6. Click **Select a User**.
7. Select a user to add from the list to your Presence-capable phone.
8. Click **Done**.
9. Click **Save**.

NOTE: If you use RingCentral Phone, the list of users under Appearance will automatically sync with the head-up display (HUD) list, used for managing incoming calls on your desktop. Any changes you make to the HUD list on your desktop will also automatically sync with the Appearance list in your online account.

10. Click the **Permissions** tab.
11. Next to **Allow other users to see my presence**, select the radio button next to **On** or **Off**.
12. Select the users who you'd like to allow to see your **Presence**.
13. Click **Save**.

Enabling Intercom

Intercom allows hands-free peer-to-peer conversations between users on desk phones and the RingCentral Phone. With Intercom, you can call another extension in your company using the Intercom softkey on the phone. Press the Intercom softkey and dial an extension. The extension phone beeps to notify the user of an incoming intercom call, and the user's speakerphone is activated and answers the call in speakerphone mode. This feature is useful for announcing parked calls, notifying of visitors, and engaging in hands-free communications with colleagues.

Call routing and forwarding is supported, so if users are on intercom calls on their desk phones, incoming regular phone calls can forward automatically to another device. Just set your forwarding rules to send calls to your mobile phone or RingCentral Phone if your desk phone is busy.

The Polycom 6000 conference phone does not have softkeys; use the touch-tone command *85 to initiate an Intercom session. RingCentral Phone cannot make, but can receive, intercom calls. The RingCentral Phone app cannot make intercom calls; incoming intercom calls convert into regular inbound calls.

RingCentral®

Enable Intercom Calls

1. From the **Settings** tab, select **Phones & Numbers**.
2. Click the **Phones** tab.
3. Click **Intercom**.
4. On the **Phones** tab, enable intercom calling by choosing a phone to accept intercom calls. Click **Disabled** (if Intercom is currently disabled) or the current Intercom-enabled phone to change the settings.
5. Select the button next to the phone you'd like to accept intercom calls.
6. Click **Save**.
7. On the **Users** tab, select users who you'd like to be able to make intercom calls to you.
8. Click **Save**.

RingCentral®

Screening, Greeting, and Hold Music

RingCentral®

Set Screening, Greeting and Hold Music

In this section, you can set your preferences for your different greetings, hold music, and blocked calls.

Set a User Greeting

Your RingCentral system comes with a default personal greeting, such as "Thank you for calling (user name)." You can easily change this greeting to your own custom greeting. Follow the steps on this page to record a custom greeting over the phone or import a prerecorded greeting from your computer.

1. Under the **Settings** tab, select **Screening, Greeting & Hold Music**.
2. Click **Edit** under **User Greeting**. A pop-up will appear with the current greeting.
3. Choose your preferred type of greeting.
   a. **Default**: Select **Default** from the menu
   b. **Custom**: Select **Custom** from the menu 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 company 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**. Click the play button to listen to your greeting.
4. Click **Done**.
5. Click **Save**.

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Set up Call Screening

Turn on this option when you want callers to announce their names before continuing to connect the call. This option lets you identify the caller so you can pick up the call immediately.

1. Under the **Settings** tab, click **Screening, Greeting & Hold Music**.
2. Under **Call Screening**, click **Enable**.
3. Click **Edit** to set call screening options. Under **Ask callers to say their names before connecting**, select the button next to your preferred condition.
4. Click **Done**.
5. Click **Save**.

RingCentral®

Connecting Message

Set the recorded message you want callers to hear to let them know the call will now be transferred to your line.

1. From the **Settings** tab, select **Screening, Greeting & Hold Music**.
2. Under **Connecting Message,** click **Enable**.
3. Click **Edit**. A pop-up appears with the current connecting message.
   Choose your preferred type of message.
   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 company 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**. Click the play button to listen to your greeting.
4. Click **Done**.
5. Click **Save**.

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RingCentral®

Audio While Connecting

Set the music you'd like callers to hear while waiting to be connected. Please note that the "Audio while connecting" setting is applied on a rule basis, the "Hold music" setting is applied for all calls.

1. From the **Settings** tab, select **Screening, Greeting & Hold Music**.
2. Under **Audio While Connecting**, click **Enable**.
3. Click **Edit**. A pop-up appears with the current audio.
4. Select the radio button next to your preferred choice of audio:
   a. **Ring Tones**.
   b. **Music**: Select audio from the drop-down menu.
   c. **Custom**: Upload a WAV or MP3 file.
   Press the **Play** button to listen to your greeting, press **Record** to re-record your custom greeting or select a different type of audio.
5. Click **Done**.
6. Click **Save**.

Set Hold Music

Set the music you'd like callers to hear while on hold. The hold music will be applied to all calls.

1. Under the **Settings** tab, select **Screening, Greeting & Hold Music**.
2. Under **Hold Music**, click **Enable**.
3. Click **Edit**. A pop-up appears with the current music.
4. Select the radio button next to your preferred choice of music:
   a. **Ring Tones**.
   b. **Music**: Select your choice of music from the drop-down menu. You have standard music options as well as options that are optimized for mobile devices at the bottom of the list.
   c. **Custom**: Upload a WAV or MP3 file.

   Press the **Play** button to listen to your greeting, press **Record** to re-record your custom greeting or select a different type of audio.
5. Click **Done**.
6. Click **Save**.

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Blocked Calls

Choose specific phone numbers and fax numbers that you'd like to block and prevent from calling or faxing your number. You can also choose what message they will hear when they attempt to call.

1. Under the **Settings** tab, select **Screening, Greeting & Hold Music**.
2. Click the **Blocked Calls** tab for call blocking options. If you are the administrator, you will see a message notifying you that calls blocked for this extension will apply to any calls to the company as well as your own extension.
3. Under **Block Option** select whether you'd like to block specific calls and faxes or all calls.
4. **Only Block these numbers or area codes**:
   a. Enter **phone numbers** (and names) of specific numbers you'd like to block.
   b. Click **Block**.
   c. Click **Callers will hear** to set the message you'd like them to hear.
5. Under **Callers will hear** you can click **Edit** to set the message you'd like these callers to hear.
6. **Block calls with no caller ID**:
   a. Select **Faxes**, **Call and Faxes**, or **None**.
   b. Check the box next to **Enable block calls from pay phones** if you'd like this option.
7. **Block calls from pay phones**:
   a. Select **Faxes**, **Call and Faxes**, or **None**.
   b. Edit **Callers will hear** to set the message you'd like these callers to hear, then click **Save**.
8. Click **Save**.

Call Handling and Forwarding

Set Call Handling and Forwarding

This section explains how to set call handling and call forwarding options.

Call Forwarding

As a user, you can set up different call forwarding rules for your extension(s). Add up to 10 forwarding numbers for each extension assigned to you, and set calls to ring at these numbers sequentially or simultaneously.

An additional setting is available only to administrators to configure the rerouting of inbound calls when an Internet outage occurs. For more information, see the topic "Call Forwarding for an Unreachable Phone" in the RingCentral Office Admin Guide.

1. From the **Settings** tab, select **Call Handling & Forwarding**.
2. Set **Incoming calls forward in this order** as follows:
   a. **Sequentially**: Use the up and down arrows next to each phone in the Move column to set the order in which your phones will ring.
   b. **Simultaneously**: All phones listed will ring at the same time.
3. **Create Ring Group**: Use this feature to group numbers and allow them to ring at the same time. Check the box beside the numbers you want to select and click **Create Ring Group**. Click **Ungroup** to ungroup the numbers.
4. **Add Call Forwarding Phone:** click this button to add another phone number up to 10 forwarding numbers for each phone extension.
5. **Forward to Other's Phones:** Click the kebab button beside **Add Call Forwarding Phone** to open this option and select from a list of other user's numbers.
6. Click **Save**.

Incoming Call Handling

You can choose settings in Incoming Call Information so when you receive a call, either at your office or forwarded to another of your phones, you will hear a recorded prompt that announces the name of the extension the caller dialed. For example, it may say, "John, you have a call." Or "Sales, you have a call."

This feature helps users who are members of more than one department, or who use phones that are both business and personal, answer the call appropriately.

1. From the **Settings** tab, click **Call Handling & Forwarding**.
2. Click the **Settings** tab.
3. Click **Edit** under **Incoming Call Information**.
4. On **Display Number**, you can select Incoming Caller ID or Called Number under **Incoming Number Displayed to Me**. This setting is useful if you are using a non-RingCentral phone as a forwarding number, so you would know how to identify a RingCentral call.
   a. **Incoming Caller ID**: displays the phone number of the person calling.
   b. **Called Number**: displays the phone number the person dialed. If you use your business phone for personal use as well, it allows you to identify business calls and answer them appropriately.

Instructions continue on next page.

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5. Click **Play Announcement**, to configure how you want the announcement to play before connecting.

6. **Direct Calls**: this setting allows you to hear an announcement when your extension or phone is called directly. This is helpful for identifying how you should answer the phone, especially if you use the phone for both business and personal use. You can select the following options under this setting:

   a. **For non-RingCentral phones only**: Plays the announcement when forwarding a call to your home or mobile phone (to help you distinguish between personal and business calls) but not when forwarding to your RingCentral phone.

   b. **Always**: All calls will be announced before being forwarded to any of your phones.

   a. **Never**: All calls will be connected without an announcement (unless they are from blocked numbers)

7. **Call Queue Calls**: This setting applies if you are a member of a call queue. This is helpful for identifying how you should answer the phone, especially if you are a member of multiple call queues.

   a. **For non-RingCentral phones only**: Plays the announcement when forwarding a call to your home or mobile phone (to help you distinguish between personal and business calls) but not when forwarding to your RingCentral phone. You will still be prompted to press 1 to accept department (Call Queue) calls on you non-RingCentral phones.

   b. **Always**: All calls will be announced before being forwarded to any of your phones.

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Overview   Messages   Call Log   Contacts   **Settings**   Tools ⌄

John Smith
Ext. 150

Outbound
Calls/Faxes

⌄ User Details

⌄ Phones & Numbers

⌄ Screening, Greeting & Hold Music

⌃ Call Handling & Forwarding

User Hours   After Hours   Advanced   **Settings**   **6**

Incoming Call Information

Displayed Incoming Caller ID

Edit

⌄ Messages & Notifications

Incoming Call Information   ✕

Display Number   **Play Announcement**   **5**

Play announcement before connecting

Direct Calls ⓘ   **6**

[For non-RingCentral phones only ▾]

Call Queue Calls ⓘ   **7**

[For non-RingCentral phones only ▾]

8   ☑ Include mailbox name in announcement

9   ☐ Require my pin to answer ⓘ   **10**

Cancel   Save

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8. Check **Include mailbox name in announcement** if you'd like the mailbox name to be included in the announcement. If this option is unchecked and you get a department (Call Queue) call, the prompt will say "Queue Call, to accept this call, press 1". If you are supposed to accept calls from the Sales and Technical Departments for example, checking this option will let you know if the call you are getting is for Sales or Technical Department.

9. Check **Require my pin to answer**: this option requires the RingCentral PIN be entered before accepting a call. This is a helpful security feature if you do not want other people to accept your calls, such as when you are at home or at another location.

10. Click **Save**.

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Call Flip

RingCentral Call Flip lets you transfer conversations from one device to another quickly and easily. Flip a call to your mobile phone on your way out of the office. Or flip a mobile call to your home phone once you've finished your commute.

Manage Your Call Flip Numbers

1. From the **Settings** tab, select the **Call Handling & Forwarding**.
2. Click the **Settings** tab.
3. Under **Call Flip** click **Edit**. A pop-up will appear with a list of numbers/ devices assigned to that user with a Flip number beside each.
4. Hold your mouse on the row, drag and drop the row to change the Flip Number assigned to the phone number. You may skip or leave any number unassigned.
5. Click **Save**.

Using Call Flip

When you are on a phone call, press the asterisk key (*) and a number corresponding to the device to which it is assigned. The call is transferred immediately to that device. For example, if you have the number 2 assigned to your home phone, clicking *2 while you are on a call will instantly transfer the call to your home phone.

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Outbound
Calls/Faxes

∨ User Details

∨ Phones & Numbers

∨ Screening, Greeting & Hold Music

∧ Call Handling & Forwarding

User Hours | After Hours | Advanced | Settings

Incoming Call Information   Call Flip
Displayed Incoming Caller ID   Edit
Edit

∨ Messages & Notifications

Call Flip ✕

Call Flip lets you transfer a live call from phone to phone without any interruption to the call. Hold your mouse on the row, drag and drop the row to change the Flip Number assigned to the phone number. When you are on a call, press ∗ and the Flip Number to transfer the call to another phone number below.

Flip Number	Phone Name	Number	
press ∗1	Polycom VVX-311 Gigabit Ethernet Phone	(650) 682-0533	Unlink
press ∗2	Existing Phone	(205) 538-0301	Unlink
press ∗3	Home	+63 (947) 5195319	Unlink
press ∗4	Mobile	+63 (947) 5195320	Unlink
press ∗5	Work	+63 (947) 5195311	Unlink
press ∗6	Mobile	+63 (947) 5195314	Unlink
press ∗7	Bob Miller VVX-311	(205) 538-0122	Unlink
press ∗8	Sam Smith Cisco SPA-122 ATA	(650) 682-1372	Unlink

Cancel | Save

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Messages and Notifications

Messages and Notifications

This section explains how to set your options for messages and notifications.

Setting Messages

In the messages section, decide whether or not you'd like to take messages, set your voicemail greeting, and choose how you'd like to be notified for different interactions.

Set a Voicemail Greeting
1. From the **Settings** tab, select **Messages & Notifications**.
2. Under **Take Messages**, click the button next to **Yes**.
3. Under **Voicemail Greeting** click **Edit**.
4. 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 company 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**. Click the play button to listen to your greeting.
5. Click **Save**.

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Set Another Extension to Receive Your Voicemail Messages

By default, you receive your own voicemail messages. To configure another user/extension to receive your voicemail messages (for example, when you are out of the office),

1. From the **Settings** tab, select **Messages & Notifications**.
2. Under **Message Recipient** click **Select Extension**.
3. Select the user who should receive the voicemail messages.
4. Click **Done**.
5. Click **Save**.

Notifications

Set your settings for email alerts or text messages when you receive a voicemail message, fax, missed call or for the status of their fax transmission results.

1. From the **Settings** tab, select **Messages & Notifications**.
2. Click the **Settings** tab.
3. Click **Notifications**. 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.
4. 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**.
   c. Click **Back to Basic Notification Settings**.
5. Click **Save**.

Voicemail to Text*

Voicemail to text provides a text version of your voicemail that allows you to get the gist of the message. This feature may take a few minutes to deliver the text version of your voicemail to your RingCentral mobile or desktop application or via email.

1. From the **Settings** tab, select **Messages & Notifications**.
2. Click the **Settings** tab.
3. Under **Voicemail to Text** select **On** or **Off**.

NOTE: The result of text transcription varies depending on the clarity of the caller's voice and background noise.

*Voicemail to Text is available for Ultimate users only.

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John Smith
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Outbound
Calls/Faxes

∨ **User Details**

∨ **Phones & Numbers**

∨ **Screening, Greeting & Hold Music**

∨ **Call Handling & Forwarding**

① ∧ **Messages & Notifications**

User Hours   After Hours   ② Settings

Notifications   ③ Voicemail to Text ⓘ

Edit   ◯ Off

Outbound Caller ID

Setting an Outbound Caller ID

This option allows a user to display or block the caller ID of their phone numbers during outbound calls. As a default, your outbound caller ID is not blocked. Follow the steps below to change it.

1. From the **Settings** tab, select **Outbound Calls/Faxes** at the top of the list of settings on the left.
2. Select the **Caller ID** tab.
3. You have the option to choose different numbers to display:
   a. **By Phone**: Choose a number to display for your softphone, mobile phone, or desk phone.
   b. **By Feature**: Choose a number to display for RingOut from Web, RingMe, Call Flip, Fax Number, and Additional Softphone.
4. Click **Edit** next to a phone number to select a phone number you want to display as your called ID number for that phone or feature type. Click **Done**.
5. Check the box next to **Display my extension number for internal calls** if you want to display your extension as your Caller ID when making internal calls. All RingCentral and IP phones will see the extension. Calls forwarded to external phones, like a mobile phone, will still show your complete direct phone number.
6. Click **Save**.

Note: The default outbound caller ID name is the company name. For RingCentral Canada accounts, you may optionally configure the Use user's name in Outbound Caller ID instead of the default of company name. This feature can also be bulk enabled through the Template feature. This parameter is not supported for RingCentral US accounts.

Outbound Fax Settings

Outbound Fax Settings

Set your outbound fax settings using these instructions.

Changing the Fax Cover Sheet

1. From the **Settings** tab, select **Outbound Calls/Faxes** at the top of the list of settings on the left.
2. Select the **Fax Settings** tab.
3. Edit your **Cover page info**. Enter your **Company name**, **Address**, **City**, **State/Province**, **Zip/Postal Code**, and **Country**.
4. Under **Cover Page** click **Select**.
5. Select and preview the **Default Cover Page**. A default cover sheet is attached to each fax you send through RingCentral. The variable information on the cover page will be filled in during the fax-sending process.
6. Click **Done**.
7. Click **Save**.

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Adding Emails That Can Send Faxes

When a user sends a fax via RingCentral, the system checks the email address of the sender, and sends the fax if it is on the approved list. Emails might include alternate company accounts or personal accounts. You can have up to five approved email addresses.

1. From the **Settings** tab, select **Outbound Calls/Faxes** at the top of the list of settings on the left.
2. Select the **Fax Settings** tab.
3. Under **Omit cover page when email subject line is blank**, select the button next to **On** or **Off** depending on your preference. If this option is selected, when you send a fax via email with a subject line, the cover page will be used. If you send it without a subject line, a cover page will not be used.
4. Enter the email address you wish to add.
5. Click **Add** (repeat for up to 25 additional addresses).
6. Click **Save**.

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John Smith
Ext. 150

Outbound
Calls/Faxes

⌄ Caller ID

∧ Fax Settings
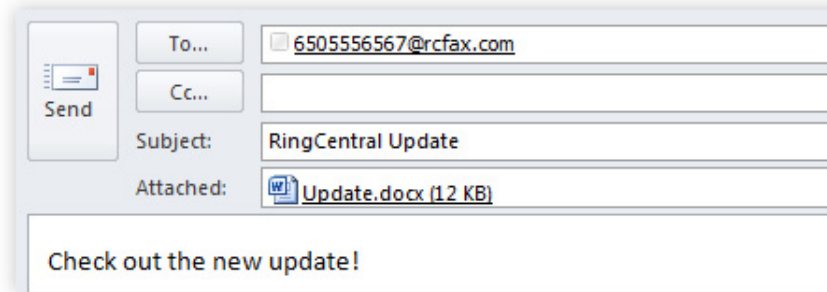
Cover Page Info

This information will be printed on your fax cover page

Company

RingCentral / DINS

Country

United States ▾

Street Address

e.g. 120 1st St SW

Apartment / Suite #

e.g. App. 25

City

e.g. Alabaster

State/Province

Select State/Province ▾

Zip Code

e.g. 35007

Fax Number

(866) 200-8330 - Main Number

Edit

Cover Page

Contempo

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

user@mycompany.com   Add

Cancel   Save

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Faxing via Email

Send faxes by emailing them as attachments from any email address you have added to the "Faxes Sent via Email" menu described previously..

1. Enter the recipient's 10-digit fax number@rcfax.com in the To: field. For example, to send a document to the fax number 1-650-555-6567, you would use this email address: 6505556567@rcfax.com.
2. Enter a subject in your email to use as your fax subject. Depending on your settings for Faxes Sent via Email, adding a subject may determine whether or not a cover page is sent with your fax. See instructions for Adding Emails that Can Send Faxes for more information.
3. Attach the document you wish to fax.
4. Type your message in the body of the email.
5. Click **Send**.

Send	To...	☐ 6505556567@rcfax.com
	Cc...	
	Subject:	RingCentral Update
	Attached:	Update.docx (12 KB)
Check out the new update!		