



# Enhanced Onboarding

Getting started is easier than ever with our enhanced onboarding process for 20+ digital lines

Welcome to RingCentral! We're so glad you've chosen to work with us for your company's communication needs. It's our top priority that you have an excellent experience, so we've compiled this packet of resources with everything you need to get started as the account admin.

## The onboarding process:



### 1. Account activation

First things first, we've got to set up your account! You'll receive an email with instructions to activate your account, which includes adding users, confirming billing details, creating a password, and more.



### 2. Welcome emails

To get you familiar with the RingCentral app, we'll send you a series of emails with tips and tricks, how-to guides and video tutorials, and other helpful resources that are perfect to bookmark and share with your team.



### 3. Pre-implementation workbook

Next, you'll fill out the [Pre-implementation workbook](#), which helps understand more about your business, so we can work with you to successfully migrate you over to your new cloud phone system.



### 4. Implementation training

For your implementation training, you can either contact our team at 866-309-2827 to get started with your onboarding sessions, or one of our specialists will reach out to you after you activate your account to start your first session.



### 5. Implementation sessions

Once we get all your migration information, we can schedule your implementation sessions. The first session will have your specialist identify and recommend account setup and features/add-ons that fit your business.

The second session will be a longer, more in-depth look at your company's needs and any other advanced topics.



### 6. Transition to account manager

After your implementation sessions are completed, your new phone system will be all set up and working properly. From here, your account manager is just a call away should you have any questions or need extra help.

## People and resources

Sales

Enhanced Implementation advisors

Account manager/Support

Activation

Tutorials

Getting started videos

Online porting

Reference guides

### Post-training 45 days support:

Still have questions after your implementation session? We offer 45 days of complimentary support with our Implementation advisor to help with anything related to setting up your new phone system.



## [RingCentral University](#)

You also have access to a centralized resource center with online training, how-to videos to manage your system, and reference guides for both administrators and users.



### [Online number porting](#)

Easily switch over your business' current phone number(s) with our online porting system and ensure a smooth transition.



### [Instructional videos](#)

Get a deeper understanding of RingCentral and its features with instructional videos to help navigate your questions and needs.



### [Administrator and user training](#)

Discover more ways to get things done with weekly webinars that highlight seamless transitions from desktop to mobile, message, phone, and video productivity, and more.



### [Reference guides](#)

Get support to successfully transfer your current service over to your new RingCentral phone system with implementation guides.

## Implementation training topics

A RingCentral Express Advisor will work with you to identify and recommend account setup and features that can be covered during your implementation sessions.

### Foundational topics:

Offers an enhanced basic instruction and configuration. RingCentral app (Messaging, Video, Phone)

- ✓ Brief overview of the user interface
- ✓ Basic and advanced call handling and forwarding
- ✓ Screening, greeting, and hold music
- ✓ Messages and notifications
- ✓ Outbound caller ID and caller name
- ✓ eFax
- ✓ User roles and permissions
- ✓ Email integration and open API
- ✓ Phone setup (provisioning)
- ✓ Number transfer walkthrough
- ✓ Enabling international calling
- ✓ Self-help options: [RingCentral University](#) and [support site](#)

### Advanced topics:

Offers an enhanced comprehensive instruction and customized configuration.

- ✓ Live Reports and analytics
- ✓ Billing
- ✓ Call queues
- ✓ Multi-level interactive voice response (IVR)
- ✓ Multi-site location
- ✓ RingCentral Video
- ✓ RingCentral Webinar
- ✓ RingCentral Rooms
- ✓ User bulk upload
- ✓ RingCentral app gallery integration
- ✓ RingCentral deskphone features and functionality
- ✓ On-demand and automatic call recordings
- ✓ RingCentral recommended headsets and routers

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For more information, please contact a sales representative. Visit [ringcentral.com](#) or call 855-774-2510.

RingCentral, Inc. (NYSE: RNG) is a leading provider of business cloud communications and contact center solutions based on its powerful Message Video Phone™ (MVP™) global platform. More flexible and cost effective than legacy on-premises PBX and video conferencing systems that it replaces, RingCentral empowers modern mobile and distributed workforces to communicate, collaborate, and connect via any mode, any device, and any location. RingCentral offers three key products in its portfolio including RingCentral MVP™, a unified communications as a service (UCaaS) platform including team messaging, video meetings, and a cloud phone system; RingCentral Video®, the company's video meetings solution with team messaging that enables Smart Video Meetings™; and RingCentral cloud Contact Center solutions. RingCentral's open platform integrates with leading third-party business applications and enables customers to easily customize business workflows. RingCentral is headquartered in Belmont, California, and has offices around the world.



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