

Welcome to RingCentral

Welcome to the RingCentral business phone system! Once you have purchased the system, you'll receive an email to activate it.

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](#) and the [RingCentral Office Admin Guide](#).

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.

 [Activate Account](#)

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

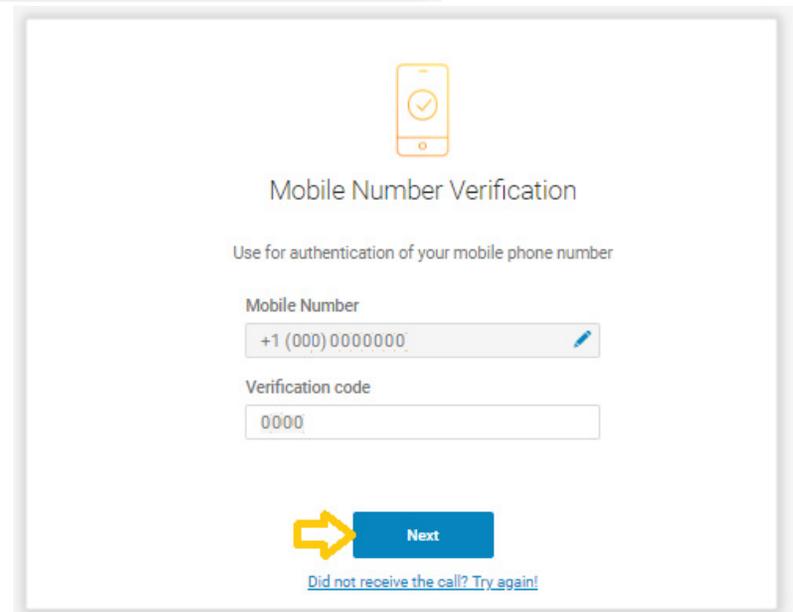
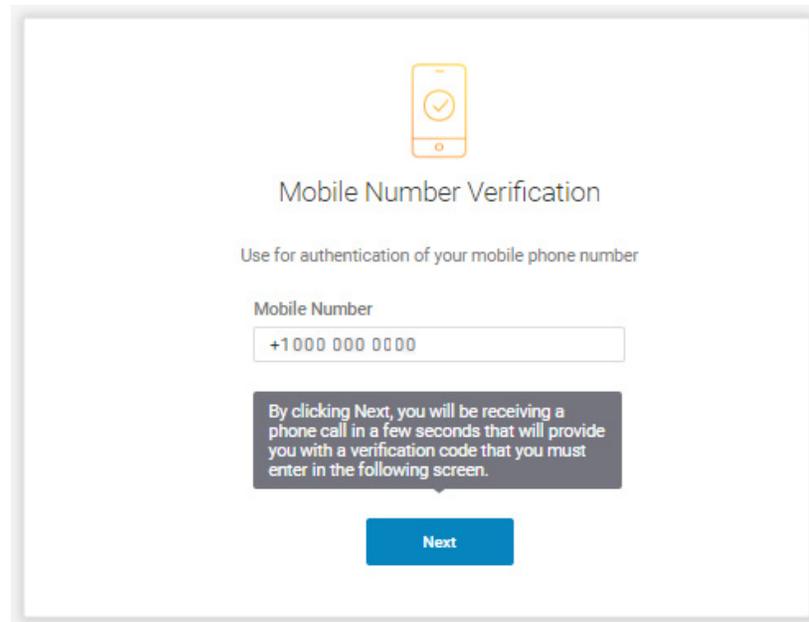
Thank you for using RingCentral.

Got Questions? The [Customer Care 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**.



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. When these requirements are met, the Continue button becomes active.

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 that appear next to the **Password** field.

Activate Your Account

Create Password
Use to login to your account

Password:

Confirm Password:

Create PIN
Used to check your voicemail messages via the phone

PIN:

Confirm PIN:

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

Question:

Answer:

Continue

Set Your PIN

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

5. Create your **PIN**.

Follow the requirements that appear next to the **PIN** field. All requirements must be met before the PIN is accepted.

You'll need this PIN when checking voice-mail.


Activate Your Account

Create Password
Use to login to your account

Password: Confirm Password:

Create PIN
Used to check your voicemail messages via the phone

PIN: Confirm PIN:

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

Question: Answer:

Set Your Security Question and Answer

The last step in **Your Account Security** is to select a **Security Question and Answer**.

Note: You will be asked for your **Security Question and Answer** each time you contact RingCentral Global Customer Care. Keep a record of the question and answer for future reference.

6. Select one of the questions listed in the **Security Question and Answer** menu.
7. Enter your answer to the security **Question** in the **Answer** field.
Note: Your answer must be at least five characters.
8. 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.”



Activate Your Account

Create Password

Use to login to your account

Password:

Confirm Password:

Create PIN

Used to check your voicemail messages via the phone

PIN:

Confirm 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.

Using the link at the bottom of the page, you can optionally schedule an appointment with an implementation advisor. You can also schedule an appointment just before, "Click Go to My Account." on page 20.

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
9. Before you click **Set Up Now**, have information ready, such as: first and last names, email addresses, and contact numbers for each user.
- Note:** If you click **Skip This Step**, the setup continues to [“Company Greeting” on page 10](#).
10. Click **Set Up Now**.

The screenshot shows the 'Users' setup screen in the RingCentral admin console. At the top, there are three navigation tabs: 'Company Info' (selected), 'My Info', and 'Review'. Below these are three sub-sections: 'Users', 'Company Greeting', and 'Operator'. The main content area features an icon of three stylized human figures and the heading 'Users'. Below the heading, it says 'Complete these fields for your users so that:' followed by four bullet points with icons: a telephone for 'You can assign an extension for them', a person with a gear for 'They can setup their own extension settings', a person 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 large yellow arrow pointing to a blue 'Set Up Now' button, and a link for '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 only 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**.

11. When you are finished, scroll down and click **Next**.

User Details

All Users
Assigned (1)
Unassigned (2)

1

First Name:

Last Name:

Email:

Contact Number:

Extension:

Phone Assigned: Polycom VVX101

Phone Number:

2

First Name:

Last Name:

9

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.

12. To skip this step now and record it later, click **Keep Default** and go to "Set the Operator Extension" on page 11.

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**.

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.

13. 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.
14. Click **Keep Default**.

The screenshot shows the 'Operator Extension' configuration page in the RingCentral Admin Setup. 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' (selected). The main content area features a headset icon and the title 'Operator Extension'. Below the title, it states: 'When callers dial your company number and **press 0**, by default they will be routed to:'. The name 'Julie Fielding' is displayed in a large font, with 'Ext. 101' underneath. At the bottom, there are two buttons: 'Customize' and 'Keep Default' (highlighted with a yellow arrow). A 'Skip This Step' link is located below the buttons.

Verify My Info Profile

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

15. 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 log in only 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.
16. 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

Use email to log in

Contact Number: +1 (000) 000-0000

Extension Number: 101

Company Number: (000) 000-0000

Direct Number: (000) 000-0000

Check or Reset your **Regional Settings**

- 17. Verify **Regional Settings** specified for your account. These are: **Country**, **Time Format**, and **Time Zone**.
- 18. 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."](#)

19. 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
20. Read the agreement describing **Emergency Calling – Registered Location**.
21. 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?

United States▼

Please select▼

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 <https://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. *(Phone device image may vary.)*

- To omit this step, click **Ring only my primary phone**. Then go to “My Info > Voicemail” on page 17.
- To add desk phones or a home phone (not mobile phone, see note) to which you can forward calls, click **Yes, add phones**.

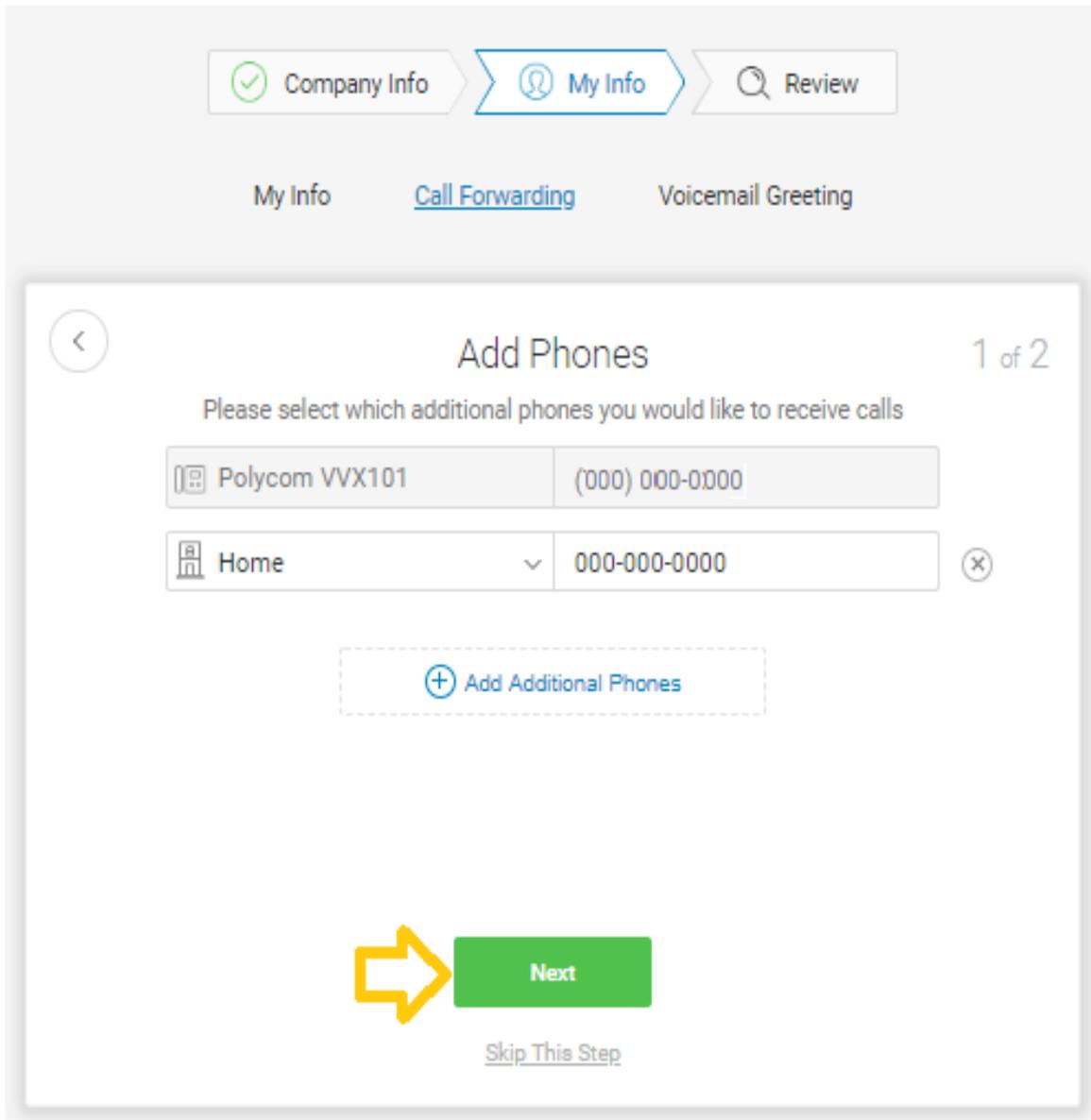
22. Click **Yes, add phones**.

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

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.

- 23. Select the phone to which the forwarded call will be sent.
- 24. Enter the number of the selected phone. Continue adding phones, by clicking **Add Additional Phones** as needed.
- 25. Click **Next**.

The setup instructions continue on the following page.



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. The default greeting text is shown below the playback button.

To keep the default, follow these steps:

- Select **Default**.
- Click **Save** and skip to “Review Your Company Settings” on page 18.

Record or Import a Voicemail Custom Greeting

26. 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.)

27. Click **Save**.

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

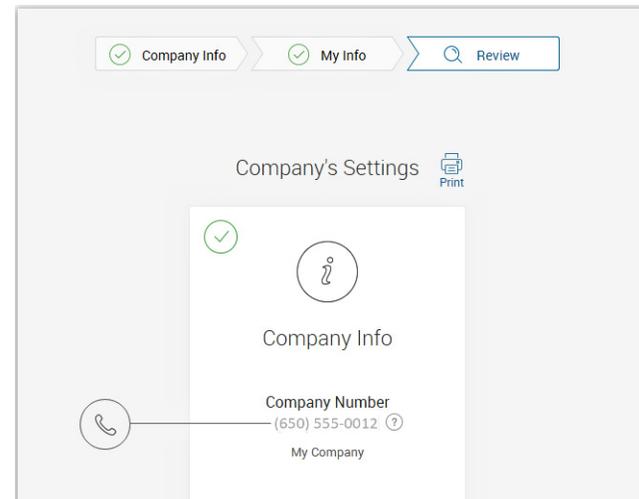
Select whether the forwarded phones ring **Simultaneously** or **Sequentially**.

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.

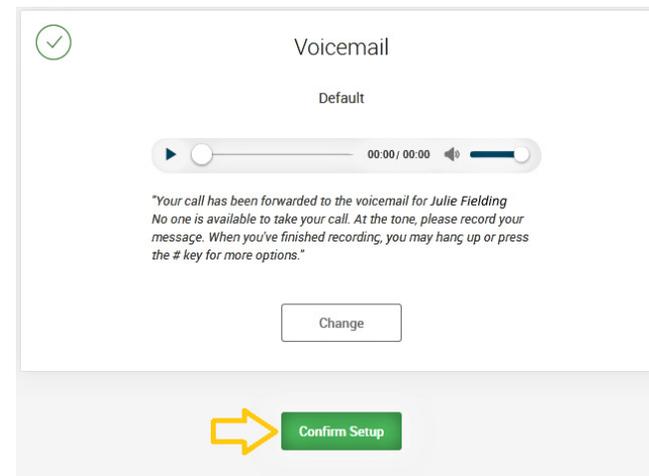
Select **Sequentially** if you prefer the call to ring on forwarded phones in a sequential order. Arrange the forwarding order by dragging up or down.

- 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](#).
- For more information about apps you can use with RingCentral Office, see the [RingCentral Office Admin Guide](#).

28. Click **Finish**.

Continue to the following page.

The screenshot shows the 'Use RingCentral Anywhere' page during the RingCentral Express Setup process. At the top left is the RingCentral logo and 'Express Setup'. At the top right is the user's account information: 'My account: (000)000-0000 Ext. 101' and a language selector 'EN'. The main content area is titled 'Use RingCentral Anywhere' with the subtitle 'Collaborate with coworkers and manage your phone system from any device'. It features three columns of desktop application download options: 'RingCentral Phone' (For international languages), 'RingCentral' (Team collaboration and communication), and 'RingCentral Meetings' (Online video and screen sharing). Below each desktop app is a 'Download' button. Underneath these is a section for 'Mobile Apps' with three columns for mobile app downloads: 'RingCentral Phone', 'RingCentral', and 'RingCentral Meetings'. Each mobile app column has buttons for 'App for iOS' and 'App for Android'. At the bottom of the page, there is a link: 'Or get apps for Chrome, Office 365 and more on the [app gallery](#)'. A yellow arrow points to a blue 'Finish' button.

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.

29. Click **Go to My Account**.

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

The Admin Portal

Your RingCentral Office opens. Switch to the Admin Portal page and take a tour:

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

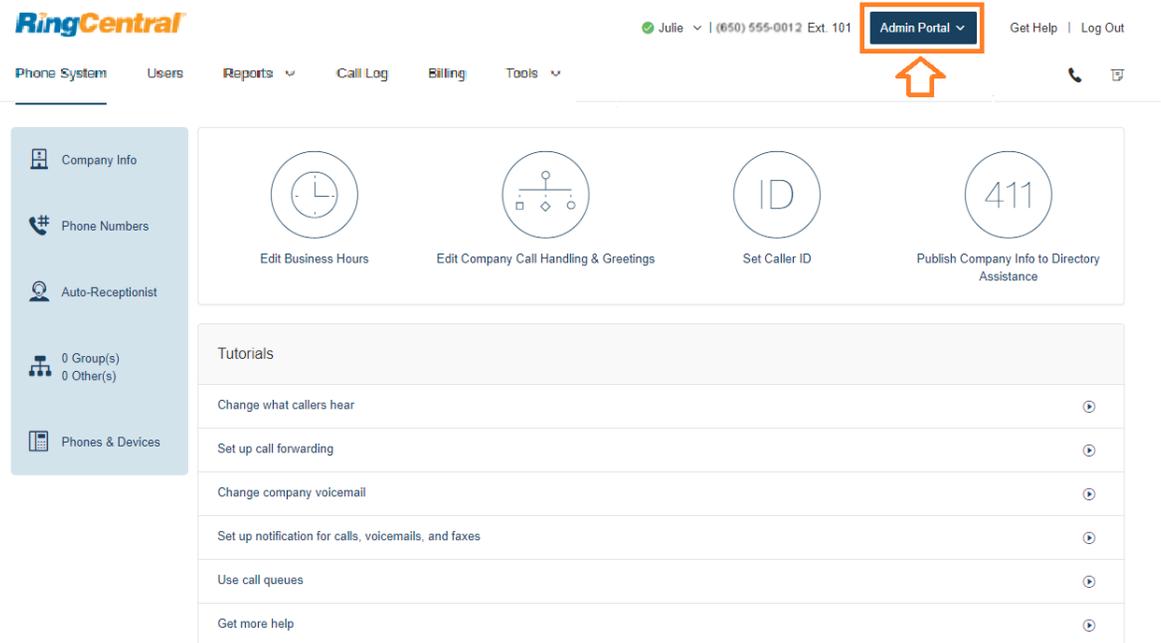
- The *RingCentral Office Admin Guide*, click [here](#).
- Support **Videos**, click [here](#).

Knowledgebase Articles

For further instructions on these subjects:

- [Sign in](#)
- [Changing your password](#)
- [Setting User Roles and Permissions](#)
- [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](#).