

RingCentral MVP™

Admin Guide

V22.1



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Overview

Introduction

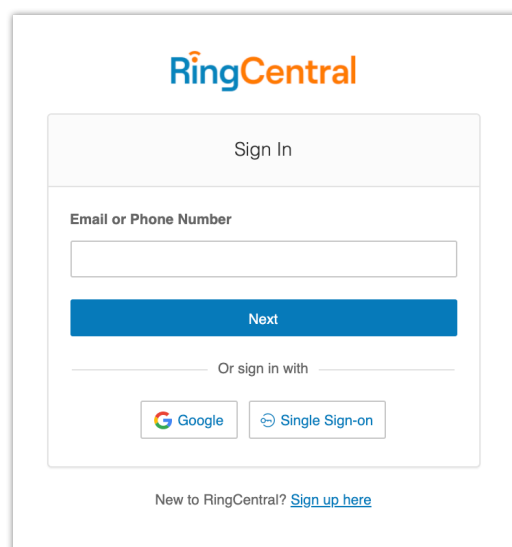
RingCentral is a cloud communications system that delivers unified team messaging, collaboration, and video meetings, coupled with unified voice, fax, and text for businesses of all sizes.

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

Accessing your account

To log in to your online account, follow these steps:

1. Navigate to [RingCentral Admin Portal](#).
2. Enter your email or RingCentral phone number.
3. Click **Next**.
4. If you entered your phone number, select your country from the dropdown menu and enter your extension number (optional) and password.
5. If you entered your email, enter your password.
6. Click **Sign in**.

The image shows a screenshot of the RingCentral 'Sign In' page. At the top is the RingCentral logo. Below it is a header 'Sign In'. The main form area has a label 'Email or Phone Number' above a text input field. Below the input field is a blue button labeled 'Next'. Underneath the 'Next' button is a link 'Or sign in with'. Below this link are two buttons: 'Google' with the Google logo and 'Single Sign-on' with a circular arrow icon. At the bottom of the form is a link 'New to RingCentral? Sign up here'.

Unified Login

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

Email or Google as user ID

You may optionally configure users to log in with a unique corporate email address or Google (Gmail or G Suite) account.

The Google login feature provides 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.

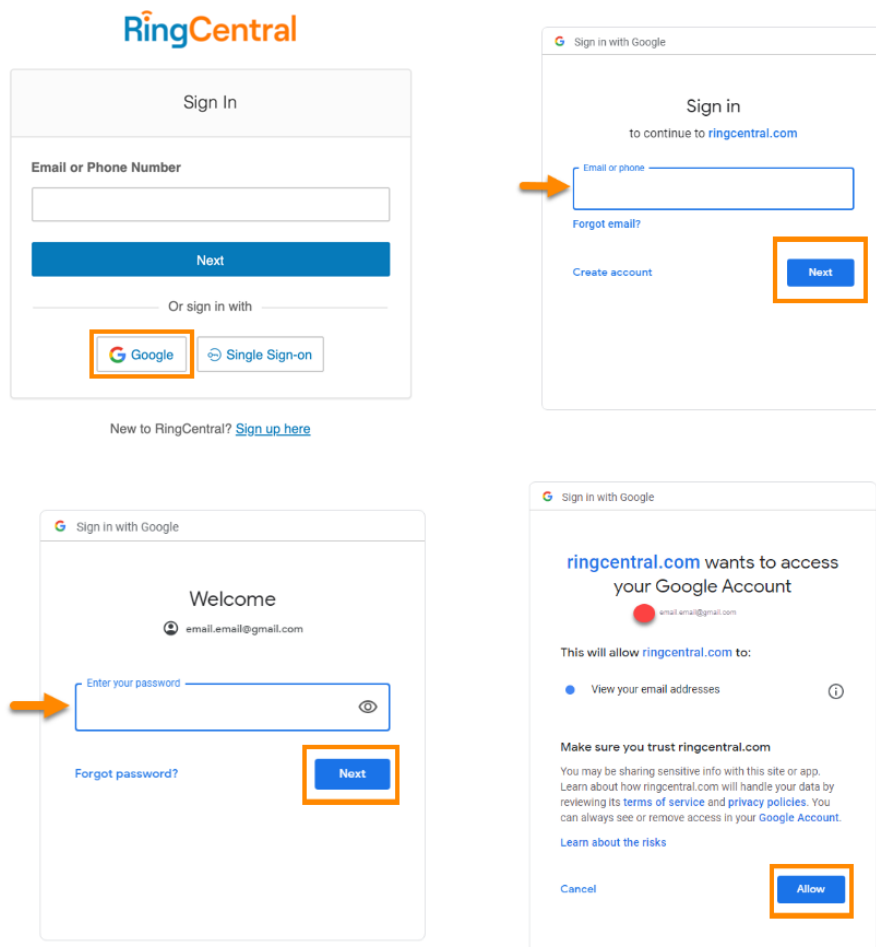
This feature applies to accessing your RingCentral online account through endpoints such as RingCentral app, integration plug-ins for Chrome, and the Multiple Account Access portal. You can configure Google Email addresses during the Express Setup of your RingCentral account.

If not already configured, set a Google email address using the following steps:

1. Navigate to [RingCentral Admin Portal](#).
2. Log in using your RingCentral credentials.
3. Select **Users > User List > Users with Extensions**.
4. Select a user from the list.
5. On **User Details > General** tab, enter the Google email in the Email field.
6. Click **Verify email uniqueness**. Resolve duplicates.
7. Click **Save**.

To log in using Google, follow these steps:

1. Navigate to [RingCentral Admin Portal](#).
2. Click **Google**.
3. If you have logged in before using your Google credentials, select your Google account from the login page to log in automatically.
OR
If this is your first time logging in, click **Use another account** on the **Sign in with Google** window.
4. Enter your Google email address or phone number.
5. Click **Next**.
6. Enter your password.
7. Click **Next** to navigate to a page requesting access to your Google account.
8. Click **Allow** to finish logging in to your online account.



Single sign-on

Single Sign-on allows employees in a company to access multiple applications with one set of credentials. You can work with RingCentral Customer Support to set up Single Sign-on for your RingCentral services, or you can set it up by yourself.

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

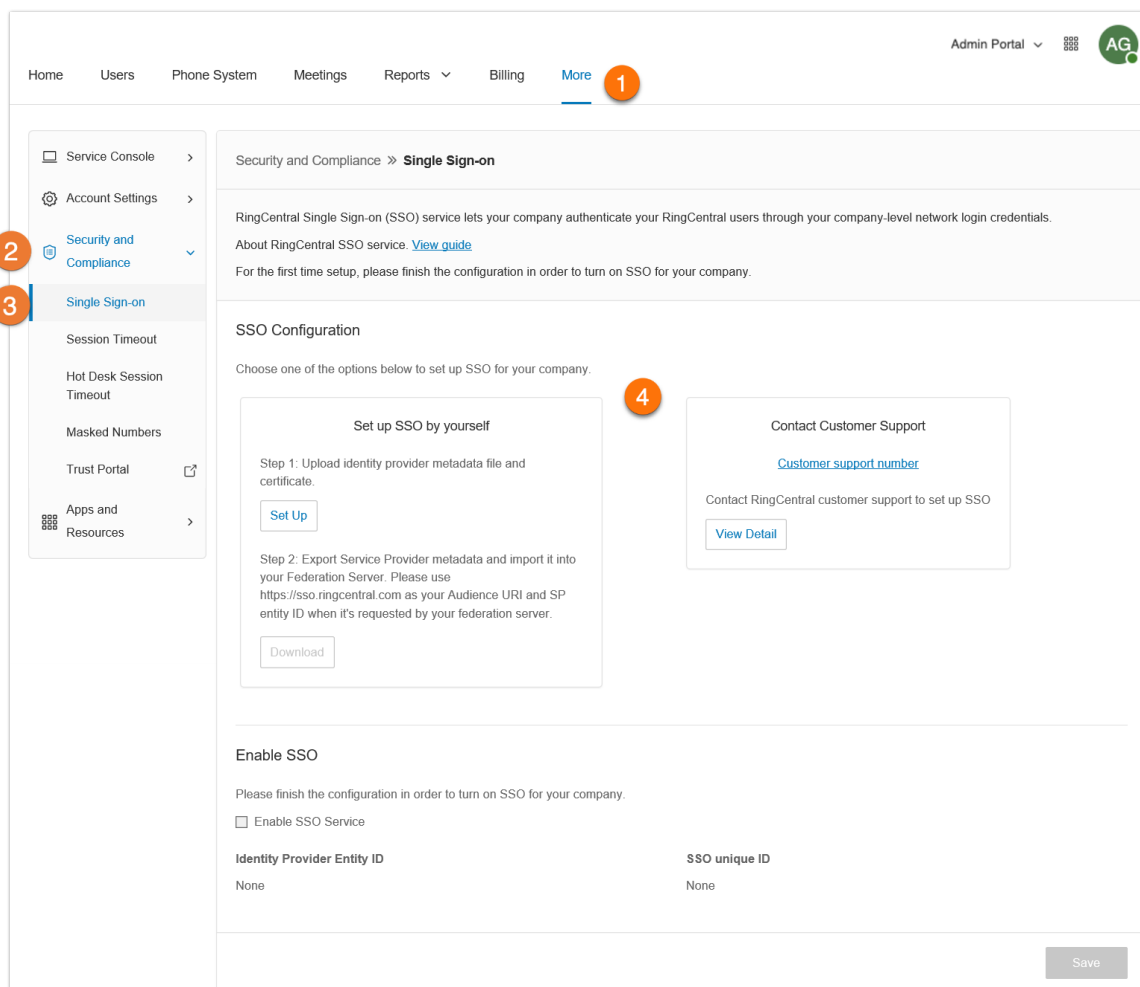
RingCentral also integrates with Google SSO, which allows G Suite customers to use the Google SSO service (offered as part of G Suite IDaaS) to sign in to RingCentral. Google lists RingCentral as an approved SSO app in their SAML apps catalog. As described here, you can configure RingCentral for SSO in the G Suite Admin Console and configure the RingCentral SSO.

To log in using single sign-on, follow these steps:

1. Click the **More** tab from the **Admin Portal**.
2. On the left-hand side, click **Security and Compliance**.

3. Click **Single Sign-on**.
4. Choose an option to set up SSO:
 - a. **Set up SSO by yourself:** Use the self-service UI to configure the Service Provider (SP) settings. Perform the steps in Set up Single Sign-On by Yourself.
 - b. **Contact Customer Support:** Use RingCentral Customer Support to configure the Service Provider (SP) settings. Click the **View Detail** link, and perform the steps in Contact Support to Enable SSO.

Note: Available for RingCentral Premium and Ultimate users only.



Account Validation

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

Admin homepage

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

Admin Portal

From the **Admin Portal**, admins can see admin-only tools:

- The **Home** tab contains shortcuts for commonly used functions. You can also access several tutorial videos from this page. Additionally, you can click on a link to access the App Gallery and Developer Portal, with quick links to integrate Google, Office 365, and Salesforce.
- The **Users** tab allows you to view and manage users, and edit user permissions.
- The **Phone System** tab houses all of the main settings for the entire phone system. Here, you have *Company Info*, *Phone Numbers*, *Auto-Receptionist*, *Groups*, *Phones & Devices*, and *Emergency Calling*.
- The **Meetings** tab is where you can see information and configure settings related to your meetings. Here, you have *Recording Management*, *Rooms*, *Webinar Settings*, *Meetings Settings*, *H.323/SIP Room Connector*, *Downloads*, and *Video Service*.
- The **Reports** tab contains the *Call Log*, *Meetings Reports*, and *Analytics*.
- The **Billing** tab displays information about your account, including *Service Plan*, *Licenses & Inventory*, *Usage*, *Calling Rates*, *Purchase*, *Meetings*, and *Device Orders*.
- The **More** tab has more setup options, including *Service Console*, *Account Settings*, *Security and Compliance*, and *Apps and Resources*.
- In addition, you can see shortcuts to edit settings for *Company*, *Users*, *Phone Numbers*, *Phones & Devices*, *Groups*, and *Billing*.

The screenshot displays the RingCentral Admin Portal interface. At the top right, there is a header with "Admin Portal" and a dropdown arrow, followed by a grid icon and a green circular logo with "AG". Below this is a navigation bar with tabs: "Home", "Users", "Phone System", "Meetings", "Reports" (with a dropdown arrow), "Billing", and "More". The "Home" tab is highlighted with an orange border.

The main content area is divided into several sections:

- Quick Access:** A grid of six categories, each with a circular icon and a list of sub-items:
 - Company** (blue icon): Business Hours, Caller ID Name, Company Greetings & Call Handling, Directory Assistance.
 - Users** (orange icon): Add User, Add User Settings Template, Manage Users, Manage User Groups.
 - Phone Numbers** (blue icon): Add Number, Reserve Numbers, Transfer Numbers, Manage Numbers.
 - Phones & Devices** (green icon): Add User Phone, Add Unassigned Phone, Manage Devices.
 - Groups** (purple icon): Add Call Queue, Add Message-Only Extension, Manage Groups.
 - Billing** (pink icon): [Icon], [Icon], Licenses & Inventory.
- Apps:** A section titled "App Gallery" with the text "Communicate Together. Integrate RingCentral communications solutions with the business apps of today and tomorrow." Below this are icons for Google, Office 365, and Salesforce, followed by a "Developer Portal" link.
- Resources:** A section with links to "Community", "Blog", "Open a Web Case", "RingCentral University", "Service Status", and "What's New".
- Tutorials:** A section with a list of tutorial steps, each preceded by a right-pointing arrow:
 - Set up call forwarding
 - Change company voicemail
 - Set up notification for calls, voicemails, and faxes
 - Use call queues
 - Change what callers hear
 - Setup and Provision devices
 - Set Up Automatic Call Recording

My Extension

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

The screenshot displays the 'My Extension' page in the RingCentral Admin Portal. The top navigation bar includes 'Overview', 'Messages', 'Call Log', 'Contacts', 'Settings', and 'More'. The 'Overview' section features five icons: 'Greeting & Call Screening', 'Call Handling Rules', 'Voicemail', 'Caller ID', and 'After Hours Settings'. Below this is a 'Recent Messages' table with columns for 'Pri...', 'From', 'Message', 'Received', and 'Actions'. The right sidebar contains 'Announcements' and 'Resources'.

Pri...	From	Message	Received	Actions
	(281) 584-4208 STAR PIPE	0:55	Yesterday 9:07	
	(409) 240-2563 RingCentral	0:24	Tue 03/02/2021 9:47	
	(630) 359-6142 ELMHURST IL	0:38	Mon 03/01/2021 13:07	
	(630) 359-6142 ELMHURST IL	0:25	Fri 02/12/2021 12:08	
	(800) 219-5357 LAWRENCE TWP NJ	0:02	Fri 02/05/2021 12:49	

Enterprise Portal

Federated accounts management is done with Enterprise Portal, which allows administrators to provision, manage, and search across multiple Ringcentral accounts configured with Federation. This feature makes administration easier for very large accounts and companies with multiple accounts by consolidating management into a single view.

Enabling Enterprise Portal

The Enterprise Portal is not enabled by default in an existing federation. One of the users in federation has to become the first Enterprise Super Admin, so that this user can go to the Enterprise Portal and share access to other Enterprise admins.

To enable the Enterprise Portal and assign the first admin:

1. From the **Admin Portal**, click the **Accounts** tab at the top left.
2. Click the **Enable** button next to Enterprise Portal.
3. Browse or search, then select the user.
4. Click **Save**.

Accessing Enterprise Portal

The Enterprise Portal is accessible via [RingCentral Admin Portal](#). If you have access to Enterprise Portal, it will be the default landing page after login. To access accounts quickly, click **Enterprise Portal** at the top right and click the name of the account.

Searching for accounts

The Federation name is at the top left of the page. To search for an account:

1. Select of the following categories:
 - Users
 - Numbers
 - Groups
 - IVRs
 - Sites
2. Type in the name, phone number, extension number, email, etc., in the search field.
3. Click the search icon.

The search results appear at the bottom of the page and you can further refine your search by choosing an option from the dropdown menus.

Adding admins to federated accounts

1. Click the **Admins** tab at the top left.
2. Click the + **Add** button. The **Add Admin** window appears.
3. Browse or search, then select the user(s) you'd like to add as admin(s). Click **Next**.
4. Under **Copy Access From**, select a user to copy their existing admin access.
OR
Select an option under **Enterprise Portal Role** to assign this role to the new admin/s.
5. Assign the account you'd like them to have access to.
6. Click **Add**

Managing Enterprise admins

You can modify an admin's access to the Enterprise Portal or remove their access to it.

1. Click the **Admins** tab at the top left.
2. Click the three-dot **More** icon under **Actions**.
3. Select *Edit access* or *Remove*.

Product help

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

- **Tooltip:** Icons that display in-product help text to help you successfully configure the feature.
- **Learn More:** Links that navigate to relevant Knowledge Base articles on the [RingCentral support portal](#) for more detailed feature information.

The image shows a two-part interface. The top part is the RingCentral Admin Portal, specifically the 'Auto-Receptionist > General Settings' page. On the left is a sidebar with navigation options: Company Info, Phone Numbers, Auto-Receptionist (selected), IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling. The main content area has a search bar and a table with columns 'Ext.' and 'Name/Type'. The table contains one entry: '40000' with a link 'Main Site'. To the right of the table are sections for 'Main Site', 'Company Hours' (set to 'Custom'), and 'IVR Settings'. Under 'IVR Settings', there are 'Top Level IVR Menu' options for 'Company Hours Top Menu' and 'After Hours Top Menu', each with a 'Text to speech' field and a 'Select IVR Menu' or 'Select Extension' button. Below these is the 'Custom Answering Rules' section, which includes a 'Learn More' link and a 'Custom Rule' button. An orange arrow points from the 'Learn More' link to the bottom part of the image.

The bottom part is a Knowledge Base article titled 'Set up Company Custom Answering Rules'. It includes metadata: 'Updated: 27 May 2020', 'Author: Liezette Cabasis C.', 'Updated By: Mike Joseph I.', 'KB ID: 3387', and 'Page Views: 132,949'. The article text states: 'Multi-condition advanced call handling or custom answering rules offer powerful call management capabilities using conditions based on time of day, date range, incoming caller ID and called number. Custom Call Handling Rules are applied before the Business Hours and After Hours rules.' Below the text is a video player with the title 'Adding a Custom Answering Rule to Your Auto-Receptionist' and a duration of 03:52. The video is from 'RingCentral University'. Below the video, it says 'For more videos like this, visit RingCentral University.' The article concludes with a list of steps to configure custom Advanced Call Handling Rules:

1. Log in as an Administrator to your RingCentral Online Account.
2. On the Admin Portal page, click Phone System.
3. Go to Auto-Receptionist > General Settings > IVR Settings.
4. Under Custom Answering Rules, click Custom Rule.
5. Click Add Rule.

Audio conference

RingCentral customers can set up, host, and join conference calls anytime, anywhere. Click the circles Conference icon in the upper right-hand side of your online account to get started.

Each customer receives a conference bridge number, and each user on the phone system gets his or her own host and participant access code so that you and your team can hold independent conferences at any time.

You can also add an international dial-in number to the invitation. Click the Select button, and then check the countries to be included from the list.

Each conference call can include up to 1000 attendees, enabling you to hold large meetings and broadcasts.

Launching the conferencing app

To launch the conferencing app, click the circles Conference icon to view and set the following:

1. Click the circles Conference icon within the **App launcher**.
2. A window will appear with conference numbers and settings.
 - a. View the Dial-in number
 - b. View Host and Participant codes
 - c. If you have international participants, click on *Select* under **International Dial-In Numbers**. Select international dial-in numbers. Click **Done**
 - d. Check the box next to **Enable join before host** to allow participants to start a conference call without a host.
 - e. Click **View** under **Conference Commands** to view the touch-tone dial pad keys you can use during your conference call.
 - f. Click **Invite with Email** to open an email with pre-populated conference details. Enter participant details and send.

Conference commands

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

- The Host has full call control and can access the conference commands shown.
- Participants have limited control of the conference commands.

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

Conference Commands

×

Use your touch-tone dialpad keys to mute or block participants, record the call, and more.

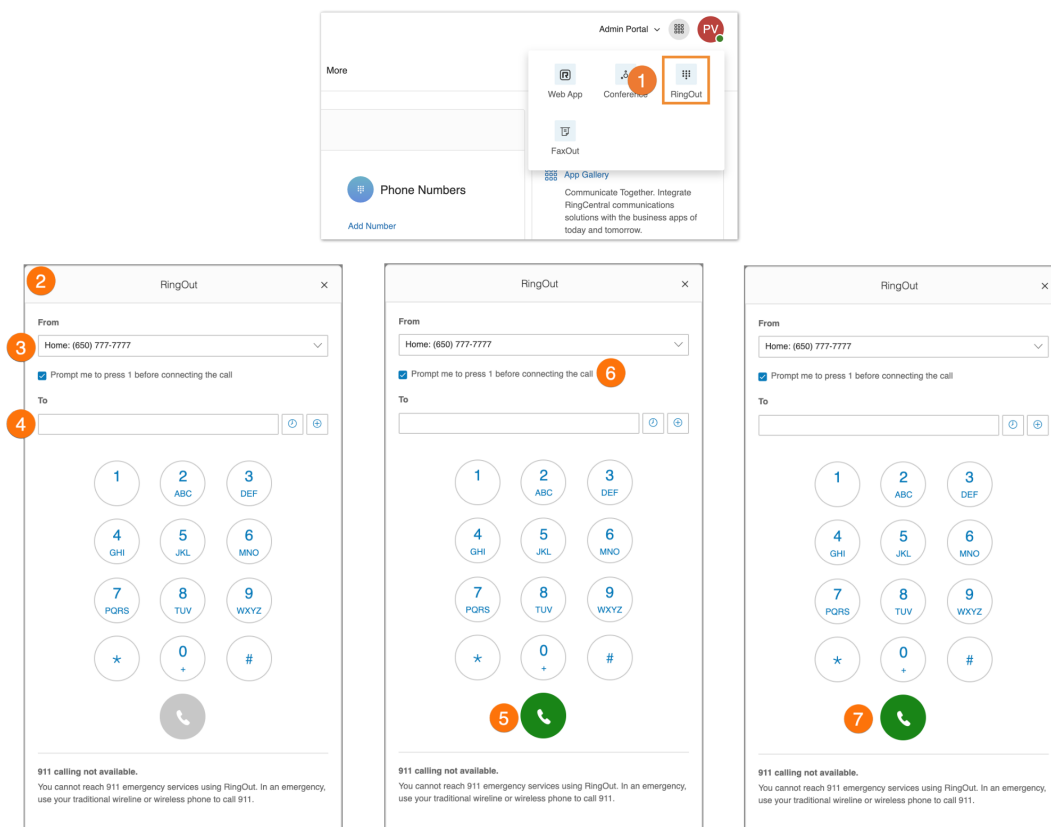
Command	Action
<div>★ # 2</div>	Caller Count Keep track of how many people are on the call
<div>★ # 3</div>	Leave Conference Lets the host hang up and end the call
<div>★ # 4</div>	Menu Listen to the list of touchtone commands
<div>★ # 5</div>	Set Listening Modes Press 1x: Mute callers - Callers can unmute with * # 6 Press 2x: Mute callers - Listen only. No unmuting option Press 3x: Unmute callers - Opens the line again
<div>★ # 6</div>	Mute Host Line Press once to MUTE Press again to UNMUTE
<div>★ # 7</div>	Secure the Call Press once to BLOCK all callers Press again to OPEN the call
<div>★ # 8</div>	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
<div>★ 9</div>	Record your conference Press once to START recording Press again to STOP recording

Done

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 **App launcher** in the upper right of every online account page.

1. Click the **App launcher** next to your profile icon in the upper right-hand side and select **RingOut**.
2. The **RingOut dialer** window will appear.
3. In the **From** field, enter the phone number of your current location (for example, your mobile number).
4. In the **To** field, enter the number you want to call. Click the **Clock** button to choose from among your recent calls, or the **Add** button to choose from your contact list.
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'd like to make the call before you are connected. When the system calls you, you will hear "Hello. To connect this call, press one." This message protects you in case you mistyped your own number, or if your voicemail picks up too quickly.
7. Click the **Call** icon. The system first calls you. When you answer (and press 1 as instructed if you've selected this option), it then calls the other number and connects you.



FaxOut

To quickly send a fax from your online account, click the **FaxOut** icon located in the upper right corner. Fill in the form with the recipient's fax number and cover page information, and attach a document.

FaxOut recognizes a wide variety of standard document types, including word processing and spreadsheet and PDF documents. Send files from Dropbox, Box, or Google Drive with just a few clicks.

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

The image shows two screenshots from the RingCentral Admin Portal. The top screenshot shows the 'App launcher' menu in the upper right corner, with the 'FaxOut' icon highlighted by an orange box and a red circle with the number 1. The bottom screenshot shows the 'Send a Fax' form, with numbered steps 2 through 6 indicating the required fields and actions:

- 2. To field (recipient's name and number)
- 3. Cover Page (checkbox to Enable)
- 4. Attach Files (dropdown menu showing 'My Computer' and a 'Browse' button)
- 5. Schedule (checkbox to Enable and a 'Send on' date/time field)
- 6. Schedule button (bottom right)

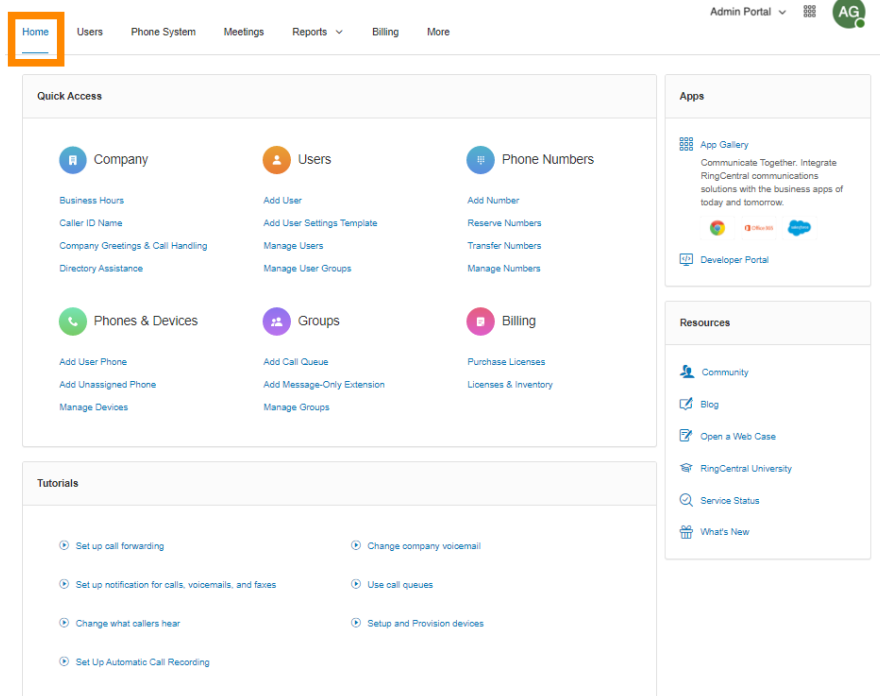
The 'Send a Fax' form includes the following fields and sections:

- To:** Field for recipient name and number (e.g., "Jack Manning" ((857) 333-3333)).
- Cover Page:** Section with an 'Enable' checkbox.
- Attach Files:** Section with a dropdown menu (currently showing 'My Computer') and a 'Browse' button.
- Attachment Table:** Table with columns 'Attachment', 'size', and 'Actions'. It contains one row: 'certificate-of-employment.pdf', '221.7K', and a 'Delete' link.
- Schedule:** Section with an 'Enable' checkbox and a 'Send on' date/time field (e.g., '07/25/2020 11:00 PM').
- Buttons:** 'Cancel' and 'Schedule' buttons at the bottom right.

Home tab

The **Home** tab contains shortcuts for quick access to commonly used functions. Here, you will find links to the following:

- Company
- Users
- Phone Numbers
- Phones & Devices
- Groups
- Billing



Click **Support** at the top right to access the [RingCentral support site](#).

In the **Tutorials** section of the Home page, you can watch short helpful videos if you need help setting up your phone system.

The **Apps** section on the upper right-hand side contains a link to the [App Gallery](#), where you can view the available apps you can integrate with your RingCentral phone system.

In the **Resources** section on the lower right-hand side, you can find external links to the following sites relevant to your RingCentral account:

- [Community](#)
- [Blog](#)
- [Open a Web Case](#)
- [RingCentral University](#)
- [Service Status](#)
- [What's New](#)

Managing users

This section describes user setting actions that can be performed by administrators such as viewing extensions, adding users, and editing user information. Let's take a closer look at these admin functions

Viewing users with extensions

1. From the **Admin Portal**, click the **Users** tab.
2. Click **Users with Extensions** under **User List**.
3. Select a user.
4. View or edit the settings for the selected user.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users' (highlighted with a red circle 1), 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Admin Portal' dropdown and 'AG' logo are on the right. The left sidebar shows 'User List' (highlighted with a red circle 2) and 'Users with Extensions'. The main content area shows a table of users with extensions, including 'Buck Strick (Super Admin)', 'Dulcinea Dunn' (highlighted with a red circle 3), 'Joe Hall', and 'Matt Smith'. A right-hand panel displays the settings for 'Dulcinea Dunn' (highlighted with a red circle 4), including 'Ext. 11103', 'Outbound Calls/Faxes', 'Meetings', 'Notifications', and expandable sections for 'User Details', 'Phones & Numbers', 'Screening, Greeting & Hold Music', 'Call Handling & Forwarding', and 'Messages'.

Customizing columns in Users with Extensions list

1. From the **Admin Portal**, click the **Users** tab.
2. On the **Users with Extensions** page, click the three-dot **More** menu at the far right, then click *Customize Columns*.
3. Check or uncheck the boxes for columns that you want to show or hide.
4. Click **Save**.

The following columns are available:

- **Status:** User status. This column is always shown by default.
- **Name:** User name. This column is always shown by default.
- **Number:** User phone numbers.
- **Ext.:** User extension.
- **Roles:** User role with role scope.
- **Department:** Department where User belongs to.
- **Email:** User email.
- **Msg.:** Number of User messages.

You can use the search function to easily find users. You can search by using first and/or last name, phone number, extension, or email address. Click the filter icon to find users via their **Status**, **Roles**, or **Department**.

Note: If the Email column is hidden, you can still perform a search using your email address, or a partial A email string. For example, if the email is user@ringcentral.com, you can search using user, user@, user@ring, etc. However, searching for the email domain will not yield any results as you can't perform a search based on keywords belonging to the email address.

Viewing unassigned extensions

View unassigned extensions, assign an extension to a user, or delete an unused extension.

1. From the **Admin Portal**, select the **Users** tab.
2. Under **User List**, click **Unassigned Extensions**.
3. To assign the extension:
 - a. Select an extension.
 - b. Select a **Setup Option**, which includes *Send invite*, *Activate by assigning credentials*, and *Activate later*. Enter information about the user that the extension will be assigned to.
 - c. Click **Save** or **Save and Enable** to add the user to your phone system.
4. To delete an unassigned extension:
 - a. Under **Actions**, click the three dot **More** icon at far right of the extension.
 - b. Click **Delete** to delete the extension.

The user interface shown is for accounts with two or more users. Accounts with one user will see a different interface.

The screenshot displays the RingCentral Admin Portal interface for managing users. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Users' link is highlighted with an orange circle labeled '1'. The left sidebar contains a 'Users' menu with sub-items: User List, Users with Extensions, Unassigned Extensions (highlighted with an orange circle labeled '2'), Roles, User Groups, and Templates. The main content area is titled 'User List » Unassigned Extensions'. It features a search bar, a 'Sites' dropdown, and buttons for '+ Add User' and 'Enable All'. Below this is a table of unassigned extensions with columns: Name, Serial No., Number, Site, and Actions. The table lists several extensions, including those with existing phones, no device assigned, and Polycom devices. An orange circle labeled '3' highlights the first row of the table. A bottom right button labeled 'Ask RingCentral' is also visible.

<input type="checkbox"/>	Name	Serial No.	Number	Site	Actions
<input type="checkbox"/>	Ext. with Existing Phone		(916) 555-1234	Company	⋮
<input type="checkbox"/>	Ext. with Existing Phone		(205) 555-1234	Company	⋮
<input type="checkbox"/>	Ext. with no device assigned		+44 (20) 8037...	Company	⋮
<input type="checkbox"/>	Ext. with no device assigned			Company	⋮
<input type="checkbox"/>	Ext. with no device assigned			Company	⋮
<input type="checkbox"/>	Ext. with no device assigned			Company	⋮
<input type="checkbox"/>	Ext. with Polycom Trio 8800 Conferenc...		(205) 555-1234	Company	⋮
<input type="checkbox"/>	Ext. with Polycom VVX 201		(205) 555-1234	Company	⋮
<input type="checkbox"/>	Ext. with Polycom VVX 201		(205) 555-1234	Company	⋮
<input type="checkbox"/>	Ext. with Polycom VVX411		(857) 555-1234	Company	⋮

Adding users with devices

1. From the **Admin Portal**, navigate to **Users > User List > Users with Extensions**.
2. Click **Add User**. The **Add Users** window appears.
3. Select a **Location** from the dropdown list in **Office User** type, then click **Select**. By default, location is based on the home country of the account.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Users' section is expanded, showing 'User List' and 'Users with Extensions'. The 'Add Users' window is open, displaying the 'Choose User Type' step. The 'Office User' option is selected, and the 'Location' dropdown is set to 'United States'. The 'Mobile User' option is also visible. The 'Add Users' window has a progress bar at the bottom with three steps: 1. Choose User Type, 2. Add User Info, and 3. Setup Options. The 'Add Users' window is titled 'Add Users' and has a close button (X) in the top right corner.

What type of users do you want to add?

Office User
Message, Video, Phone [Learn More](#)

Location **3**
United States
Select

Mobile User
Message, Video, Limited Phone [Learn More](#)

FREE
Select

Cancel

4. Fill in the basic information about the user. **Require unique email IDs** is checked by default. You can uncheck it if you don't want this option. Note that if this is unchecked, users cannot be invited by email.
5. If you'd like to add more users, enter the number on the field provided, then click **Add**. You can add up to 24 more users (25 users at a time). You may also click the duplicate icon at the far right to

create a new row to add a user and retain the selection details, except for first name, last name, and email.

6. Make a selection under **Phone**. Options include *Inventory phone*, *Purchase phone*, and *Bring your own device*.
7. If you selected *Inventory phone*, choose the desk phone that you'd like to assign to the user. If you selected *Purchase phone*, choose the device you'd like to purchase. Use the search bar or set filters to narrow down devices based on your specific requirements.

Add Users

✓ Choose User Type **2 Add User Info** 3 Setup Options

Office user licenses available: 946 ⓘ

4 Email: rcuser123@gmail.com First Name: RC Last Name: User Cost Center: John Smith Ext.: 11102 **6** Phone: RingCentral Phone... Number: Select

5 1 + Add

Require unique email IDs

Back Next

Select from Phone Inventory

Search

Status	Phone Name	Serial No.
<input type="radio"/>	Bob Smith Existing Phone	1234567890
<input checked="" type="radio"/>	Cisco SPA-122 ATA	N/A
<input type="radio"/>	Jack Manning Existing Phone	6416789012
<input type="radio"/>	John qqq Cisco SPA-303 Desk Phone	N/A
<input type="radio"/>	John Smith Cisco SPA-122 ATA	1234567890
<input type="radio"/>	Jack Manning Existing Phone	N/A
<input type="radio"/>	Polycom Trio 8880 Conference Phone	N/A
<input type="radio"/>	Dobbie Smith Cisco SPA-500G Desk Phone	N/A
<input type="radio"/>	Allen Test Existing device	N/A
<input type="radio"/>	ana smith Existing Phone	N/A

Total: 13 Show: 10 < 1 2 >

Cancel Done

Purchase Phone

Search

Recently Bought **All Phones**

Sort by: Device Name

Categories: ☒ All ☐ Analog Adapter ☐ Conference Phone ☐ Cordless Phone ☐ Desk Phone

Brands: ☐ Cisco ☐ Polycom ☐ Unity ☐ Yealink

Supported features: ☐ Shared Lines ☐ Common Lines

Connectivity: >

Space: >

Price: >

<p>Cisco 7941 Gigabit Business Phone</p> <p>\$209.00</p>	<p>Cisco 8961 Gigabit Color Business Phone</p> <p>\$329.00</p>	<p>Cisco CP8821 Business IP Phone</p> <p>\$99.00</p>
<p>Cisco CP8851 Gigabit Color Business Phone</p> <p>\$249.00</p>	<p>Cisco CP8851 Gigabit Color Business Phone with 1 Expansion Module</p> <p>\$449.00</p>	<p>Cisco CP8851 Gigabit Color Business Phone with 2 Expansion Modules</p> <p>\$649.00</p>

8. Click **Select** under **Number**. Select a number from the **Number Inventory** tab, which has the numbers reserved for your account. Click **Numbers** to assign a new number. Select the State, Area Code, and a number. Click **Done**. If you're an admin with purchasing permissions, you can add new users and see the charges. If you don't have purchasing permissions, you'll be blocked and will need to contact your billing admin for adding more licenses.
9. Select, edit, or add shipping address if you've selected *Purchase Phone* under **Phone**. You can ship purchased devices to a single or multiple addresses.
10. Click **Next**.

8

Select Number

Number Inventory

New Numbers

Search

Locations

Number	Name	Location
<input type="radio"/> (916) 459-2340		United States, Fair Oaks, CA
<input type="radio"/> (520) 246-5625		United States, Casa Grande, AZ
<input type="radio"/> (520) 246-5704		United States, Casa Grande, AZ
<input type="radio"/> (520) 246-5736		United States, Casa Grande, AZ

Total: 4

Show: 25 < 1 >

CancelDone

Add Users

✓ Choose User Type

2 Add User Info

3 Setup Options

Office user licenses available: 946 ⓘ

☒ Require unique email IDs

Email	First Name	Last Name	Cost Center	Site	Ext.	Phone	Number
abcdef.ghijkl222@gmai	Abcdef	Ghijkl	John Smit...	Company	11102	Cisco 8861 G...	(520) 246-5625(In... >

1 + Add

Shipping Info [Ship to multiple addresses](#)

9

Select Shipping Address

Unit 1 Minden St., Jamaica Plain, MA, 02130, United States Edit New

Attention to

Something New

Select Shipping Method

Ground

Select Cost Center

John Smith Company

Order Summary

One-time Charges	Qty	Subtotal*
Phones	1	\$329.00

Today's Estimated Total* \$329.00

*This price does not include calculations for prorated amounts, taxes, fees, and/or shipping.

10

BackNext

Setting up users

After the final step in [Adding users with devices](#), you will see the following **Setup options** to onboard the User:

- **Send invite**: Set up a user by sending a welcome email with an activation link.
- **Activate by assigning credentials**: Set up and activate a user by assigning credentials. No welcome email will be sent.
- **Activate later**: Set up a user now but activate at a later time. No welcome email or notifications will be sent.

Sending invite to a user

1. Select *Send Invite* under **Setup options**.
2. Click on **Edit Role** under **Assigned Role** if you want to change the permissions of the user. By default, a user is set to have **Standard User (International)**.
3. Click **Next**. The **Add Users - Confirm** window appears.
4. Review the charges and check the acknowledgment box at the bottom.
5. Click **Next**.

Activating by assigning credentials to a user

1. Select *Activate by assigning credentials* under **Setup Option**.
2. Fill in the info under **Credential**.
 - a. Password
 - b. Reenter Password
 - c. PIN
 - d. Reenter PIN
 - e. Security Question
 - f. Answer

Note that these are all required fields.

3. Check the box for **Temporary Password** to prompt users to reset the password when they sign in for the first time (optional).
4. Under **Emergency Address**, click **Add** beside the name of users with devices.
5. Fill in the info for the emergency address.
6. Read and understand the important notes about emergency calling service, check the box to acknowledge, then click **I Accept**.
7. Click on **Edit Role** under **Assigned Role** if you want to change the permissions of the user. By default, a user is set to have **Standard User (International)**.
8. Click **Next**. If you click **Next** without doing Steps 4-6, there will be a prompt for **Missing Emergency Address**. You may click **Back to Add Emergency Address** or **Yes** to continue without an emergency address. If you don't add an emergency address at this point, user(s) will be required to add their emergency address when they log in to their RingCentral online account or RingCentral app.

9. Review the charges and check the acknowledgment box at the bottom.
10. Click **Next**.

Activating user at a later time

1. Select *Activate later* under **Setup Option**.
2. Click on **Edit Role** under **Assigned Role** if you want to change the permissions of the user. By default, a user is set to have **Standard User (International)**.
3. Click **Next**. The **Add Users - Confirm** window appears.
4. Review the charges and check the acknowledgement box at the bottom.
5. Click **Next**.

Adding free users (without a device and a number)

1. From the **Admin Portal**, navigate to **Users > User List > Users with Extensions**.
2. Click **Add User**. The **Add Users** window appears.
3. Click **Select** in **Mobile User** type.

RingCentral

Admin Portal

Home Users Phone System Meetings Reports Billing More

1 User List

Users with Extensions

Unassigned Extensions

Roles

User Groups

Templates

User List » Users with Extensions

Search

+ Add User Download User List

Delete Enable Disable Send Invite Set Credentials Apply Templates Change Site

	Status	Name	Number	Ext.	Roles	Department	Site	Msg.	Actions
<input type="checkbox"/>	✓	Aaron Lee	(217) 339-6413	11070	Marketing QA		Company	13 / 18	⋮
<input type="checkbox"/>	✓	Ada Smith	(205) 319-4800	11101	Marketing QA		Company	25 / 35	⋮

Add Users

1 Choose User Type 2 Add User Info 3 Setup Options

What type of users do you want to add?

Office User
Message, Video, Phone [Learn More](#)

Location
United States

Select

Mobile User
Message, Video, Limited Phone [Learn More](#)

3 FREE

Select

Cancel

- Fill in the basic information about the user. **Require unique email IDs** is checked by default. You can uncheck it if you don't want this option. Note that if this is unchecked, users cannot be invited by email.
- If you'd like to add more users, enter the number on the field provided, then click **Add**. You can add up to 24 more users (25 users at a time). You may also click the duplicate icon at the far right to create a new row to add a user. Click **Next**.

Add Users

✓ Choose User Type 2 Add User Info 3 Setup Options

☒ Require unique email IDs

4 Email: mnopqrs.tuvwxyz444@gmail.c First Name: Mnopqrs Last Name: Tuvwxyz Cost Center: John Smith Comp... Site: Company Ext.: 11102

5 1 + Add

Back Next

Setting up free users

After the final step in Adding users without devices, you will see the following setup options to onboard the User:

- Send invite: Set up a user by sending a welcome email with an activation link.
- Activate by assigning credentials: Set up and activate a user by assigning credentials. No welcome email will be sent.
- Activate later: Set up a user now but activate at a later time. No welcome email or notifications will be sent.

Sending invite to a user

1. Select *Send Invite* under **Setup Option**.
2. Click on **Edit Role** under **Assigned Role** if you want to change the permissions of the user. By default, a user is set to have *Standard User (International)*.
3. Click **Submit**.

Activating by assigning credentials to a user

1. Select *Activate by assigning credentials* under **Setup Option**.
2. Fill in the info under **Credential**.
 - Password
 - Reenter Password
 - PIN
 - Reenter PIN
 - Security Question
 - Answer

Note that these are all required fields.

3. Check the box for **Temporary Password** to prompt users to reset the password when they sign in for the first time (optional).
4. Click on **Edit Role** under **Assigned Role** if you want to change the permissions of the user. By default, a user is set to have *Standard User (International)*.
5. Click **Submit**.

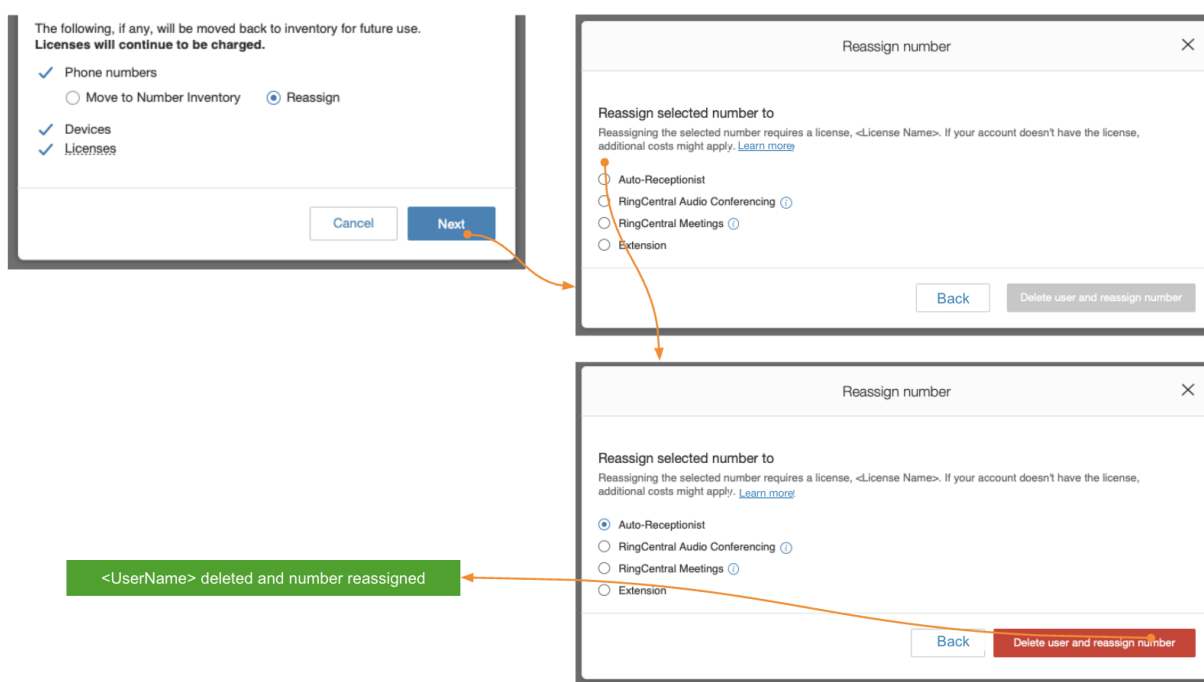
Activating user at a later time

1. Select *Activate later* under **Setup Option**.
2. Click on **Edit Role** under **Assigned Role** if you want to change the permissions of the user. By default, a user is set to have **Standard User (International)**.
3. Click **Submit**.

Deleting users and reassigning phone numbers

When deleting a user or extension assigned with a phone number, you specify whether to return the number to your number inventory or reassign the number. When reassigning a number you can choose to reassign to an extension, or to auto-receptionist, audio conferencing, or RingCentral Meetings. Reassigning a number may require a license. If your account does not have a license, additional costs may apply.

1. Click the **Users** tab from the **Admin Portal**.
2. Choose **User List > Users With Extensions**.
3. Click **Delete** opposite the disabled user extension. The **Delete user** window will appear.
4. In **Phone Numbers**, select *Move to number inventory* or *Reassign*.
5. In the **Reassign number** window, choose where to reassign the number.
6. Click **Delete user and reassign number**. You receive a message confirming the action.



When deleting multiple users, some numbers may not be reassigned to the number inventory. For example, BYOC gateway numbers, forwarded numbers, and AU13 numbers may not be reassigned to the number inventory and will be assigned by default to the auto-receptionist.

Resetting and assigning a user

You can use the **Reset and Assign** feature to reset a former user's settings and assign the extension to a new user for quicker onboarding. Only disabled extensions have the option to be reset.

1. Click the **Users** tab from the **Admin Portal**. **Users with Extensions** is the default selection under **User List**.
2. Click on the three-dot More icon at the far right of any entry with a red **Disabled** marker in the **Status** column. Only disabled extensions have the option to be reset to a new user.
3. Select **Reset and Assign**. The **Reset and Assign** window will appear.
4. Check the boxes to the left of each entry that you want to activate for the user you are reassigning.
5. Click **Next** to access the **Assign New User** page.
6. Choose setup options, and enter the name and any other profile details you want to change for the new user being assigned to the extension.
7. Click **Reset and Assign**.

A green notification banner confirms successful reassignment, along with a confirmation email to the admin. You can also confirm results in [Audit Trail](#).

The screenshot shows the RingCentral Admin Portal interface. At the top, there's a navigation bar with 'Admin Portal' and 'AG' icons. Below it, a sidebar on the left lists 'User List' with 'Users with Extensions' selected. The main content area displays a table titled 'User List » Users with Extensions'. The table has columns: Status, Name, Number, Ext., Roles, Department, Site, Msg., and Actions. The first row is 'Buck Strick (Super Admin)' with status 'Enabled'. The second row is 'Dulcinea Dunn' with status 'Enabled'. The third row is 'Joe Hall' with status 'Enabled'. The fourth row is 'Matt Smith' with status 'Disabled' (indicated by a red dot). A dropdown menu is open for 'Matt Smith', showing options: 'Enable', 'Reset and Assign' (highlighted with a red circle), 'Copy and Assign', and 'Delete' (highlighted with a red circle). Other users listed include 'Buck Strick (Super Admin)', 'Dulcinea Dunn', and 'Joe Hall'.

Status	Name	Number	Ext.	Roles	Department	Site	Msg.	Actions
Enabled	Buck Strick (Super Admin)	(409) 200-2364	11101	Super Admin	Company		4 / 49	⋮ ▾
Enabled	Dulcinea Dunn	(409) 240-2768	11103	Standard (l...	Company		0 / 2	⋮
Enabled	Joe Hall	(409) 209-0429	11102	Standard (l...	Company		5 / 5	⋮ ▾
Disabled	Matt Smith	(409) 240-2967	11104	Standard (l...	Company		0 / 0	⋮

Reset and Assign

1 Reset Settings

2 Assign New User

Reset settings for new user

All personal settings for this extension will reset to default. [View personal settings](#)
Select the settings below to reset. Other settings not mentioned will remain the same.

4

☒ User Settings

☒ Screening, Greeting & Hold Music
☒ Call Handling & Forwarding
☒ Message Settings
☒ Outbound Caller IDs
☒ Outbound Fax Settings

☐ Phone Settings
☐ Presence
☐ Delegates
☐ Intercom

☐ Groups
☐ Call Queue: None
☐ Paging Only: None
☐ Shared Lines: None
☐ Park Locations: None
☐ Call Monitoring: None
☐ User Groups: None

5

Cancel

Next

Reset and Assign

✓ Reset Settings

2 Assign New User

6

Setup Option

☒ Send invite ⓘ
☐ Activate by assigning credentials ⓘ
☐ Activate later ⓘ

New User Info

First Name *

Last Name *

Email Address *

Short Extension Number
104
Full Extension Number: 11104

☒ Users require unique email IDs
Verify Email Uniqueness

Contact Phone

Mobile Phone

Job Title

Department

Site
Company

Assigned Role ⓘ
Standard (International)
Edit Role

Settings

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

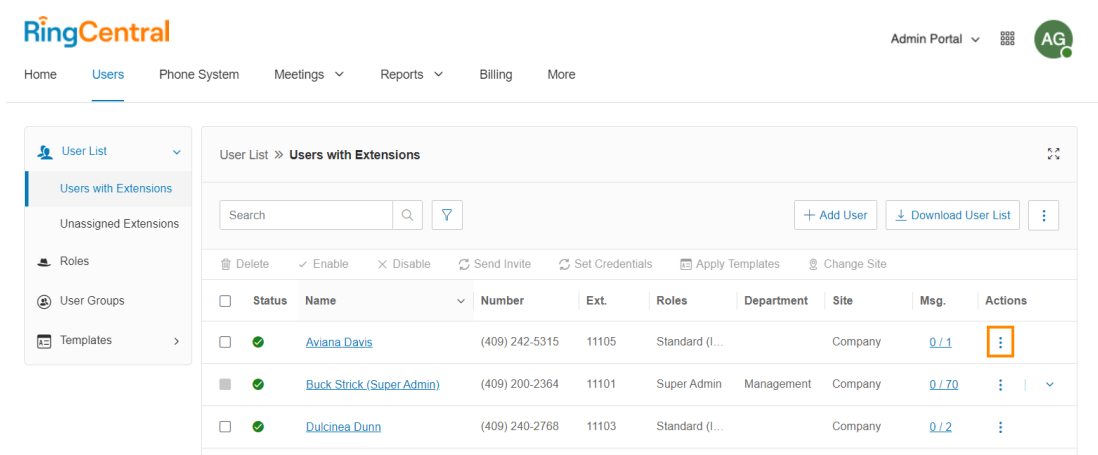
7

Back

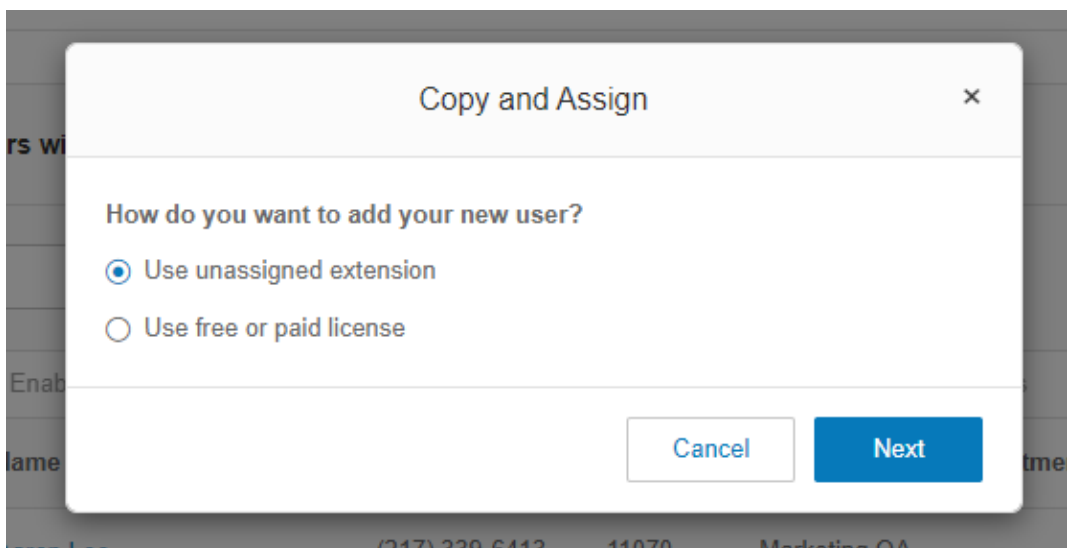
Reset and Assign

Copying and assigning existing user settings using an unassigned extension

1. From the **Admin Portal**, navigate to **Users > User List > Users with Extensions**.
2. Select the user you want to copy and click the **More** button under the **Actions** column at the far right.



3. Select **Copy and Assign**.
4. On the **Copy and Assign** window, choose **Use unassigned extension**. Click **Next**.



5. Select one of the following tabs:
 - **Users with Devices:** Select this option if you want to assign a device or a DigitalLine to the new user. Select the device, then click **Next**.
 - **Users without Devices:** Select this option if you don't want to assign a device or a DigitalLine to the new user. Select the extension, then click **Next**.

Copy and Assign

1 Select Unassigned Extension 2 Copy Settings 3 Assign New User

Users with Devices Users without Devices

Search Cost Center

Select	Name	Serial No.	Number	Cost Center
<input type="radio"/>	Ext. with Polycom VVX 201 IP Phone		+12345	John Smith Company
<input type="radio"/>	Ext. with Polycom VVX 201 IP Phone		+12345	John Smith Company

6. Select the settings you want to be copied. Any settings not selected will be set to default. Click **Next**.
7. Choose a **Setup Option**. Options include Send invite, Activate by assigning credentials, and *Activate later*.

Copy and Assign

✓ Select Unassigned Extension ✓ Copy Settings 3 Assign New User

Setup Option

☒ Send invite ☐ Activate by assigning credentials ☐ Activate later

8. Click **Copy and Assign**.

Exporting a user list

Exporting a User List

You can export a list of users and extensions in Microsoft Excel file format. You can use this feature to create a company directory or to perform an audit of users.

1. Click the **Users** tab from the **Admin Portal**.
2. Click **Download User List** to download a list of users and extensions for audit.
3. View the file in Microsoft Excel.

The screenshot illustrates the process of exporting a user list from the RingCentral Admin Portal to Microsoft Excel. The Admin Portal interface shows the 'Users' tab selected, with a 'Download User List' button highlighted. The resulting Excel file contains the following data:

Mailbox ID	First Name	Last Name	Extension	Email	Mobile Phone	Depart
62409920012	Buck	Strick	11101	stricklandpropane13		
62409920012	Buck	Strick	11101	stricklandpropane13		
62522245012	Dulcinea	Dunn	11103	dulcinea.dunn@gmail.com		
62409922012	Joe	Hall	11102	rchu4241@gmail.com		
62409922012	Joe	Hall	11102	rchu4241@gmail.com		
62409927012	Matt	Smith	11104	mattymatthewsmith@gmail.com		

Editing user information in bulk

You can efficiently make changes for multiple users in a single action. You export a template and add your user information into the template for import to RingCentral. This feature is available for accounts with two or more users and is not available to accounts that are using Active Directory.

To edit user information in bulk:

1. Click the **Users** tab from the **Admin Portal**.
2. Click the three-dot **More** icon on the right-hand side and click *Edit User Information*.
3. Click **Download** or enter an email address and click **Send**.
4. Fill out the template with the user information.
5. Click **Browse** and upload the user file.
6. Confirm that you will overwrite all the user data.

Converting a virtual extension to a digital line

To convert a virtual extension to a digital line:

1. Click the **Users** tab from the **Admin Portal**.
2. Select a user to convert with a direct inward dialing (DID) number but without a digital line.
3. Click **Phones & Numbers**.
4. Click **Phones**.
5. Click **Add Phone**.
6. In the **Add User Phones** window:
 - a. Select **Domestic** or **International** as the location.
 - b. Select a phone for the user on the **Select Devices** screen (this phone may be either a softphone or a physical phone).
 - c. Click **Existing Number** on the **Select Number** screen. Select the DID (number) from the user you are trying to convert.
 - d. Select your emergency address on the **Add Emergency Address** screen.
 - e. Complete the wizard.

Note: On the checkout screen, you will see a charge for the digital line and a credit for the DID. You will not see a credit for virtual extensions that are Active User Extensions, as those are post-billed.

Managing User Settings

Admins can edit the following user settings:

- User Details
- Phones & Numbers
- Screening, Greeting & Hold Music
- Call Handling & Forwarding
- Messages
- Outbound Caller ID
- Outbound Fax Settings
- Notifications

Administrators access and edit settings through the Users panel.

1. From the **Admin Portal**, select the **Users** tab
2. Click the name of the user
3. On the user settings pane
 - Select a category to edit (for example, **Outbound Calls/Faxes**)

Under **Outbound Calls/Faxes**, click the category to edit (**Caller ID** or **Fax Settings**)

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users' (highlighted with a red circle 1), 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Users' sidebar on the left contains 'User List' (with a red circle 1), 'Users with Extensions', 'Unassigned Extensions', 'Roles', 'User Groups', and 'Templates'. The main content area is titled 'User List > Users with Extensions' and features a search bar, '+ Add User', and 'Download User List' button. Below this is a table of users with columns for 'Status' and 'Name'. The user 'Jack Manning' is highlighted with a red circle 2. To the right of the table, a settings pane for 'Jack Manning' is open, showing categories like 'User Details', 'Phones & Numbers', 'Screening, Greeting & Hold Music', 'Call Handling & Forwarding', and 'Messages'. The 'Outbound Calls/Faxes' category is selected (highlighted with a red circle 3), and the 'Outbound Calls/Faxes' sub-category is further highlighted with a red circle 4.

Status	Name
<input type="checkbox"/>	Aaron Lee
<input type="checkbox"/>	Ada Smith
<input type="checkbox"/>	Allen Test
<input type="checkbox"/>	Anne Smith
<input type="checkbox"/>	Billing_qwerty
<input type="checkbox"/>	Bob Smith
<input type="checkbox"/>	EA Phone
<input type="checkbox"/>	Executive Jones
<input type="checkbox"/>	Executive Smith
<input checked="" type="checkbox"/>	Jack Manning
<input type="checkbox"/>	John Smith (Super Admin)
<input type="checkbox"/>	John Smith

Jack Manning
Ext. 11108 Outbound Calls/Faxes
User Details
Phones & Numbers
Screening, Greeting & Hold Music
Call Handling & Forwarding
Messages
Outbound Calls/Faxes

User details

Click on **User Details** to view and edit the selected user's information. From this menu, you can edit the role assigned to a user, as well as a user's extension, name, recording, phone numbers, email address, job title, department, hours, password, and regional settings. You can also manage the single sign-on policy for your users here.

The image displays two screenshots of the 'User Details' form in RingCentral, showing the 'General' and 'Settings & Permissions' tabs.

General Tab:

- First Name:** Buck
- Last Name:** Strick
- Job Title:**
- Short Extension Number:** 101
- Full Extension Number:** 11101
- Mobile Phone:**
- Status:** Enabled
- Record User Name:** Hank Hillis
- Department:**
- Contact Phone:** (303) 908-9766
- Email:** stricklandpropane135logatosrd@gmail.com
- Password:** Change Password
- Verify Email Uniqueness:**
- Yes, I would like to receive information on product education, training materials, etc.** (checked)
- Send an email when a phone is added** (checked)
- Buttons:** Copy and Assign, Cancel, Save

Settings & Permissions Tab:

- Regional Settings:** GMT-08:00, English (U.S.)
- User Hours:** Custom
- Roles:** Super Admin
- User Groups:** Test
- Template:** Apply
- Site:** Company
- Confirmation Message:** 3 seconds
- Single Sign-on:** ☐ Enforce SSO
- Buttons:** Edit

Managing single sign-on policy

Admins can manage the single sign-on (SSO) policy at the user level. When SSO is enabled on the account, it controls the SSO login for all users on the account.

When **Enforce SSO** is enabled on the account, a user-level setting will be available to provide exceptions for users that admins would want to allow to use their RingCentral credentials for authentication. The user extension setting for SSO option is turned on by default when **Enforce SSO** is enabled on the account level.

Admins can also enforce SSO at a later time for these users that have already set their RingCentral credentials during onboarding.

Before you can change the SSO policy at the user extension level, ensure first that you have configured the SSO settings and have enabled the SSO service on your account. For more information, navigate to [Single sign-on](#).

To manage SSO policy at the user extension level:

1. Click the **Users** tab from the **Admin Portal**.
2. Click **User List**.
3. Search the name of the user or browser through the list of **Users with Extensions**. You can also use the filter and search by **Status**, **Roles**, **Department**, and **Sites**. Click the name of the user.
4. Click **User Details**.
5. Click **Settings & Permissions**.
6. Check the box next to **Enforce SSO** under **Single Sign-on**.

Admins can also manage the SSO policy via templates. To learn more, navigate to [Managing templates](#).

The screenshot displays the RingCentral Admin Portal interface with several steps highlighted by numbered orange circles:

- 1**: The **Users** tab is selected in the top navigation bar.
- 2**: The **User List** dropdown menu is open in the left sidebar.
- 3**: The **Users with Extensions** section is selected in the sidebar, and the corresponding table is displayed. The table lists users with their status, name, and extension number.
- 4**: The **User Details** view is selected for the user **Buck Strick (Super Admin)**.
- 5**: The **Settings & Permissions** tab is selected within the user details view.
- 6**: The **Single Sign-on** section is visible, showing the **Enforce SSO** checkbox.

The **Users with Extensions** table contains the following data:

Status	Name	Ext.	Outbound Calls/Faxes	Meetings	Notifications
✓	Buck Strick (Super Admin)	102			
✓	Dulcinea Dunn				
✓	Joe Hall				
✗	Matt Smith				

Phones & Numbers

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

^ Phones & Numbers

Numbers

Phones

Conference

+ Add Direct Number

Number	Type	Name	Actions
(623) 555-5555	Direct		Edit
(719) 555-5555	Direct		Edit

^ Phones & Numbers

Numbers

Phones

Conference

+ Add Phone

Presence

Delegates

Intercom

Phone Nickname	Phone Type	Number	Actions
Appointments Specialist ...	RingCentral Ph...	(205) 555-5555	Edit
Existing Phone	Existing Phone	(650) 555-5555	Edit
Jack Manning Cisco SPA-...	Cisco SPA-122...	(213) 555-5555	Edit
Jack Manning Polycom R...	Polycom Trio 8...	(650) 555-5555	Edit
RingCentral Phone app	RingCentral Ph...	(205) 555-5555	Edit
SoftPhone	RingCentral Ph...		Edit

Primary Number

Admins and users can set a direct number as a user's primary number displayed across different endpoints, namely Admin Portal, RingCentral desktop app, and RingCentral mobile app.

An admin with user management permissions would be able to set this on behalf of other users. A user would be able to set this on their profile.

To set a user's primary number:

1. Click the **Users** tab from the **Admin Portal**.
2. Click the name of the user whose primary number you want to set to under **Users with Extensions**.
3. Click **Phones & Numbers**.
4. Click **Edit** under **Primary Number**.
5. Select the number you want to set as a primary number.
6. Click **Apply**.

The screenshot illustrates the process of setting a user's primary number in the RingCentral Admin Portal. The interface is divided into a top navigation bar, a left sidebar, and a main content area. The top navigation bar includes links for Home, Users (highlighted with a red circle 1), Phone System, Meetings, Reports, Billing, and More. The left sidebar contains a 'User List' dropdown menu with options for Users with Extensions, Unassigned Extensions, Roles, User Groups, and Templates. The main content area displays a table of users under the heading 'User List > Users with Extensions'. The table has columns for Status, Name, and a list of users: Buck Strick (Super Admin), Dulcinea Dunn, Joe Hall, and Matt Smith. A red circle 2 highlights the name 'Buck Strick'. To the right of the table, there is a 'Buck Strick' user card. The card has tabs for 'Ext. 11101', 'Outbound Calls/Faxes', 'Meetings', and 'Notifications'. Below the tabs, there is a 'User Details' section and a 'Phones & Numbers' section. The 'Phones & Numbers' section shows the 'Primary Number' as 'Direct - +44 (20) 45325308'. A red circle 3 highlights the 'Edit' button next to the primary number. A red circle 4 highlights the 'Edit' button in the 'Primary Number' section. A modal window titled 'Edit Primary Number' is open, showing a search bar and a table of available numbers. The table has columns for Select, Number, Name, and Type. The first row is selected, showing the number '(408) 200-2384' with the name 'Desk Phone'. A red circle 5 highlights the 'Select' radio button for this number. The second row shows the number '+44 (20) 45325308' with the name 'Direct Number'. A red circle 6 highlights the 'Apply' button at the bottom right of the modal. The modal also shows a 'Total: 2' and 'Cancel' and 'Apply' buttons.

Screening, Greeting & Hold Music

Click **Screening, Greeting & Hold Music** to view and edit the selected user's greeting, call screening options, connecting message, audio while connecting, hold music, and blocked call settings.

Screening, Greeting & Hold Music

User HoursAfter HoursBlocked Calls

User Greeting

☒ Enable

Default

00:00 / 00:00

Default Greeting: "Thank you for calling Jack Manning"

Edit

Call Screening

☒ Enable

If Caller ID not present, ask callers to say their name before connecting.

Edit

Connecting Message

☒ Enable

Default

00:00 / 00:00

Default Message: "Please hold while I try to connect you."

Edit

Audio While Connecting

☒ Enable

Music: Acoustic

00:00 / 00:00

Music or Ringtone callers will hear while connecting

Edit

Hold Music

☒ Enable

Music: Acoustic

00:00 / 00:00

Edit

CancelSave

Screening, Greeting & Hold Music

User HoursAfter HoursBlocked Calls

Block option

Specific calls and faxes

Only block these numbers or area codes

Phone Numbers or Area CodesName (Optional)+ Add

Number	Name	Actions
(857) 222-2222	RingCentral	Delete

Callers will hear

I'm sorry. The number you dialed can not be reached from your calling area. Goodbye.

00:00 / 00:00

Edit

Robocalls

Block option

Ring devices and apps

Trusted numbers

Phone NumberName (Optional)+ Add

Block calls with no caller ID

Block option

None

Block calls from pay phones

☒ Enable block calls from pay phones

Callers will hear

I'm sorry, the number you dialed cannot accept calls from payphones at this time. Please try your call again later. Goodbye.

00:00 / 00:00

Edit

CancelSave

Call Forwarding and Voicemail

Click **Call Forwarding and Voicemail** to view and edit the selected user's call handling, call forwarding, ring group, additional phones, ring pattern, incoming call, and call flip settings.

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

- If the call forward is configured on the phone hardware, the forwarding will not be indicated in the RingCentral system.
- The Call Forward selection on the phone setup between multiple devices is restricted to run only three times.
- If a user receives an E911 callback, and Call Forward is enabled on the user's phone, the configured destination will receive the E911 call.

^ Call Forwarding and Voicemail

Work Hours

After Hours

Custom Rules

Settings

Incoming Calls

Set how you'd like to answer calls during work hours. [Learn More](#)

🔔 Ring all at once

Create Ring Group

Ungroup

Delete

<input type="checkbox"/>	Order	Active	Ring For	Name	Number
⋮ <input type="checkbox"/>	1	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Promotion	(650) 295-123
⋮ <input type="checkbox"/>	1	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Phone 1	(530) 503-2222
⋮ <input type="checkbox"/>	1	<input checked="" type="checkbox"/>	Always Ring	Desktop & Mobile...	

+ Add number or coworker

Missed Calls:

Set how you'd like your missed calls to be handled during work hours.

📞 Send to voicemail

Voicemail Greeting

Default

▶ 00:00 / 00:00 🔊

Edit

Select voicemail box

☒ This Extension (Ext. 101)

☐ Specific Extension

Cancel

Save

Outbound Calls/Faxes

In the user settings pane, click the **Outbound Calls/ Faxes** tab to configure settings for caller ID and fax.

Outbound Caller ID

Click **Caller ID** to view and edit the selected user's outbound caller ID numbers.

^

Caller ID

Decide which phone number will display as Caller ID for outgoing calls. ⓘ

By Phone

John Smith Cisco SPA-303 Desk Phone

(857) 777-7777 - Main Company Number

Edit

By Feature

RingOut from Web

(857) 777-7777 - Main Company Number

Edit

Call Flip

(857) 777-7777 - Main Company Number

Edit

Mobile App

Not-specified

Edit

Common Phone

(857) 777-7777 - Main Company Number

Edit

Alternate Caller ID

Not-specified

Edit

RingMe (Outgoing to Caller)

(857) 777-7777 - Main Company Number

Edit

Fax Number

(857) 777-7777 - Main Company Number

Edit

Additional Desktop App

(857) 777-7777 - Main Company Number

Edit

Delegated Caller ID

(857) 777-7777 - Main Company Number

Edit

Internal Calls

☒ Display my extension number for internal calls. ⓘ

Cancel

Save

Outbound Fax settings

Click **Fax Settings** to view and edit the selected user's fax cover page settings and fax via email settings.

^ Fax Settings

Cover Page Info

This information will be printed on your fax cover page

Company

e.g. John Doe

Country

United States

Street Address

e.g. 120 1st St SW

Additional address (Optional)

e.g. Suite 500 or Building A, Floor 3

City

e.g. Alabaster

State/Province

Select State/Province

Zip Code

e.g. 35007

Phone Number

(857) 777-7777 - Main Company Number

Edit

Cover Page

Contempo

Select

Fax Number

(857) 777-7777 - Main Company Number

Edit

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

Email@example.com

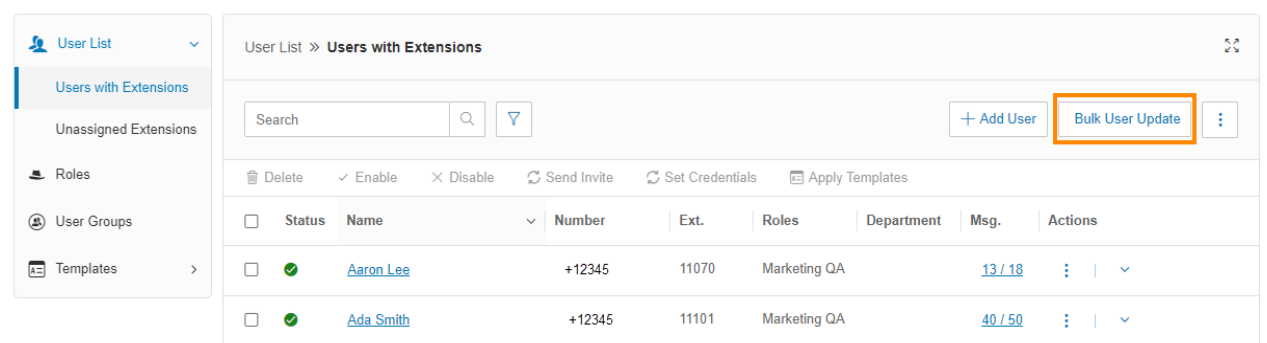
Add

Cancel

Save

Bulk adding or editing users

1. Log in as an administrator to the RingCentral online account.
2. From the **Admin Portal**, navigate to **Users > User List > Users with Extensions**.
3. Click **Bulk User Update**. This will open the **Assign Users** window.



4. Choose a **Setup Option**. Options include *Send invite*, *Activate by assigning credentials*, and *Activate later*.
5. The option for **Users require unique email IDs** is checked by default. If you've selected *Send invite* under **Setup Option**, you are unable to uncheck this box. If you've selected either *Activate by assigning credentials* or *Activate later*, you can uncheck the **Users require unique email IDs** if you don't want this option.

Note: If this is unchecked, users cannot be invited by email and you have to select another setup option.

6. Select a **File Format**. Options include *Excel Workbook (.xls)* and *Excel Workbook (.xlsx)*.
7. Enter your email address in the **Send Email** to field, and click **Send**.
8. Click **OK** on the **Alert** window that says the template file is sent.
9. Check your email and download the template. Read the instructions carefully and fill out the template with your users' information. Save the file once you're done.
10. Click **Browse** under **Upload File**. Locate the Excel file containing your users' info, click **Open**, and then click **Upload**.

Setting up users

After the final step in adding a user extension, you will see the following setup options to onboard the user.

- *Send invite*: Set up a user by sending a welcome email with an activation link.
- *Activate by assigning credentials*: Set up and activate a user by assigning credentials. No welcome email will be sent.

- *Activate later*: Set up a user now, but activate at a later time. No welcome email or notifications will be sent.

Activating by assigning credentials to a user

1. Select *Activate by assigning credentials* under **Setup Option**.
2. Fill in the info under **Credential**:
 - Password
 - Reenter Password
 - PIN
 - Reenter PIN
 - Security Question
 - Answer

Note that these are all required fields.

3. Check the box for **Temporary Password** to prompt users to reset the password when they sign in for the first time (optional).

Managing roles and permissions

Roles and permissions enforce your company security policy by providing flexible, role-based access to your RingCentral phone system. You can delegate access to certain areas without giving full admin access, or by retaining control over certain areas. You can use templates and bulk upload options to efficiently apply roles among users across an organization.

Predefined roles

You can grant access privileges by assigning users one of the seven predefined roles:

- **Super Admin:** Complete system administrator-level access.
- **Phone System Admin:** Phone System settings access plus full access to user-level settings.
- **Billing Admin:** Full access to billing functions, user-level settings, international dialing, and some analytics features.
- **User Admin:** Full access to user administration (self and others), international dialing, and system features/apps.
- **Manager:** Provide users with all capabilities of Standard (International) along with access to key functions such as Reports and Company Call Log.
- **Standard (International):** User level access with international dialing access.
- **Standard:** User level access without international dialing access.

Note: Predefined roles cannot be modified.

Custom roles

You can create custom roles to meet your business needs. When creating a custom role you select an existing role as a starting point, and select permissions to be assigned to the role. To create a custom role, click **New Role**.

Note: This feature is available only to RingCentral MVP Premium and Ultimate with two or more users in the US, Canada, and UK.

Assigning users to a role

To assign users to a role: From the **Admin Portal**, select the **Users** tab.

1. Click **Roles**.
2. Select one of the roles to assign users.
3. Click the **Assigned Users** tab to view the users currently assigned to the selected role.
4. Click **Assign User**. A list of users and their currently assigned roles is displayed.
5. Select the users to assign to the role.
6. Click **Assign**.

The users' roles are assigned and displayed in the Users list assignments are displayed in the **Users** list.

Note: The **New Role** option is available for MVP Premium and Ultimate users only.

The first screenshot shows the 'Roles' page in the RingCentral Admin Guide. The 'Roles' section is highlighted in the left sidebar. The 'Roles' table lists the following roles:

Role Name	Type of Role	Description
Admin - User and Roles	Custom	User and Role Manager
Analytics Portal Manager	Custom	
Billing Admin	Predefined	Billing functions plus Standard International and Manager functions.
CU Test - Meetings	Custom	
Manager	Predefined	Company reporting functionality plus Standard International.
Marketing QA	Custom	
Marketing QA 2	Custom	

The second screenshot shows the 'Manager' page. The 'Assigned Users' section is highlighted in the left sidebar. The 'Assigned Users' table lists the following users:

Name	Number	Ext.	Department	Site	Role Domain	Actions
Aaron Lee	11113		Marketing QA	Company	Select Site	
Ada Smith	100		Marketing QA	Company	Select Site: Company	
Allen Test	11138		Marketing QA	Company	Select Site	
Mik Ilagane	11123		Standard (International)	Company	Select Site	
Mike Tan	11102		Super Admin	KB	Company	Select Site
Marni Babi	11136		Standard (International)	Self-Service	Company	Select Site
Reileen Kovacs	11119		Standard (International)	Company	Select Site	
Sandra Brown	11110		Standard (International)	Company	Select Site	

The third screenshot shows the 'Assign users to role' dialog box. The 'Assign users to role' table lists the following users to be assigned:

Name	Ext.	Roles	Department	Site	Role Domain
Aaron Lee	11113	Marketing QA		Company	Select Site
Ada Smith	100	Marketing QA		Company	Select Site: Company
Allen Test	11138	Marketing QA		Company	Select Site
Mik Ilagane	11123	Standard (International)		Company	Select Site
Mike Tan	11102	Super Admin	KB	Company	Select Site
Marni Babi	11136	Standard (International)	Self-Service	Company	Select Site
Reileen Kovacs	11119	Standard (International)		Company	Select Site
Sandra Brown	11110	Standard (International)		Company	Select Site

Modifying a user's role

You can modify a user's role by editing the user's page.

1. Click the **Users** tab from the **Admin Portal**.
2. Click the user whose role you will modify.
3. Click **User Details**.
4. Click **Settings & Permissions**.
5. Click the **Edit** button under **Roles**.
6. Select the role.
7. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Users' tab is selected in the navigation bar (1). The left sidebar shows 'Users with Extensions' as the active section. The main content area displays a list of users (2). The user 'Jack Manning' is selected, and a modal window for 'Jack Manning' is open. In the modal, the 'User Details' tab is active (3), and the 'Settings & Permissions' sub-tab is selected (4). Under the 'Roles' section, the current role is 'Standard', and an 'Edit' button is visible (5).

Status	Name
<input type="checkbox"/>	Aaron Lee
<input type="checkbox"/>	Ada Smith
<input type="checkbox"/>	Allen Test
<input type="checkbox"/>	Anne Smith
<input type="checkbox"/>	Billing_qwerty
<input type="checkbox"/>	Bob Smith
<input type="checkbox"/>	EA Phone
<input type="checkbox"/>	Executive Jones
<input type="checkbox"/>	Executive Smith
<input type="checkbox"/>	Jack Manning
<input type="checkbox"/>	John Smith (Super Admin)

Jack Manning

Ext. 11108 Outbound Calls/Faxes Meetings Notifications

User Details

General **Settings & Permissions**

Regional Settings
GMT+08:00, English (U.S.)
[Edit](#)

Roles
Standard
[Edit](#)

Template
[Apply](#)

User Hours
Custom
[Edit](#)

User Groups
None
[Edit](#)

Site
Company
[Edit](#)

Creating a new role

To create a new, custom role:

1. Click the **Users** tab from the **Admin Portal**.
2. Click the **Roles** panel.
3. Click **New Role**.
4. Select a role to use as a template, or starting point, then click Next. The **Create New Role** window appears.
5. Enter the **Name** and **Description** for the new role, then click **Next**.
6. Set the permissions for the new role.
7. Click **Create Role**.

Note: This option is available for MVP Premium and Ultimate only.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Home', 'Users' (1), 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Users' tab is active. The left sidebar contains 'User List', 'Roles' (2), 'User Groups', and 'Templates'. The main content area is titled 'Roles' and includes a description: 'Roles give admins the ability to control what users can do within the system. A role is a collection of permissions which could be based on a job function. Marketing QA is assigned to new users by default.' Below this is a 'Search Roles' input field and a '+ New Role' button (3). A table lists existing roles:

Role Name	Type of Role	Description
Admin - User and Roles	Custom	User and Role Manager
Analytics Portal Manager	Custom	
Billing Admin	Predefined	Billing functions plus Standard International and Manager functions.
CU Test - Meetings	Custom	
Manager	Predefined	Company reporting functionality plus Standard International.

Setting a default role

For ease of use, you can create a custom role and then set that role as the default role assigned to all newly-created users.

If you do not set a default role, all newly-created users are automatically set to the Standard (International) role.

1. [Create your custom role.](#)
2. Click **Users** from the **Admin Portal**.
3. Click **Roles**.
4. Select the custom role you created.
5. Click **Edit**.
6. Click the checkbox **Set as Default**.
7. Click **Save**.

Note: You can also select one of the predefined roles to be the default role.

The first screenshot shows the 'Roles' page in the Admin Portal. The 'Users' tab is selected in the top navigation bar (1). In the left sidebar, the 'Roles' link is highlighted (2). The main content area shows a list of roles with columns for Role Name, Type of Role, and Description (3). The roles listed are: Admin - User and Roles (Custom), Analytics Portal Manager (Custom), Billing_Admin (Predefined), CU Test - Meetings (Custom), and Manager (Predefined). A '+ New Role' button is visible in the top right of the roles list.

The second screenshot shows the 'Edit' page for the 'Analytics Portal Manager' role (4). The 'Overview' tab is selected in the left sidebar. The role details show the Name as 'Analytics Portal Manager' and the Type of Role as 'Custom' (5). There is a checkbox labeled 'Set as Default' which is currently unchecked.

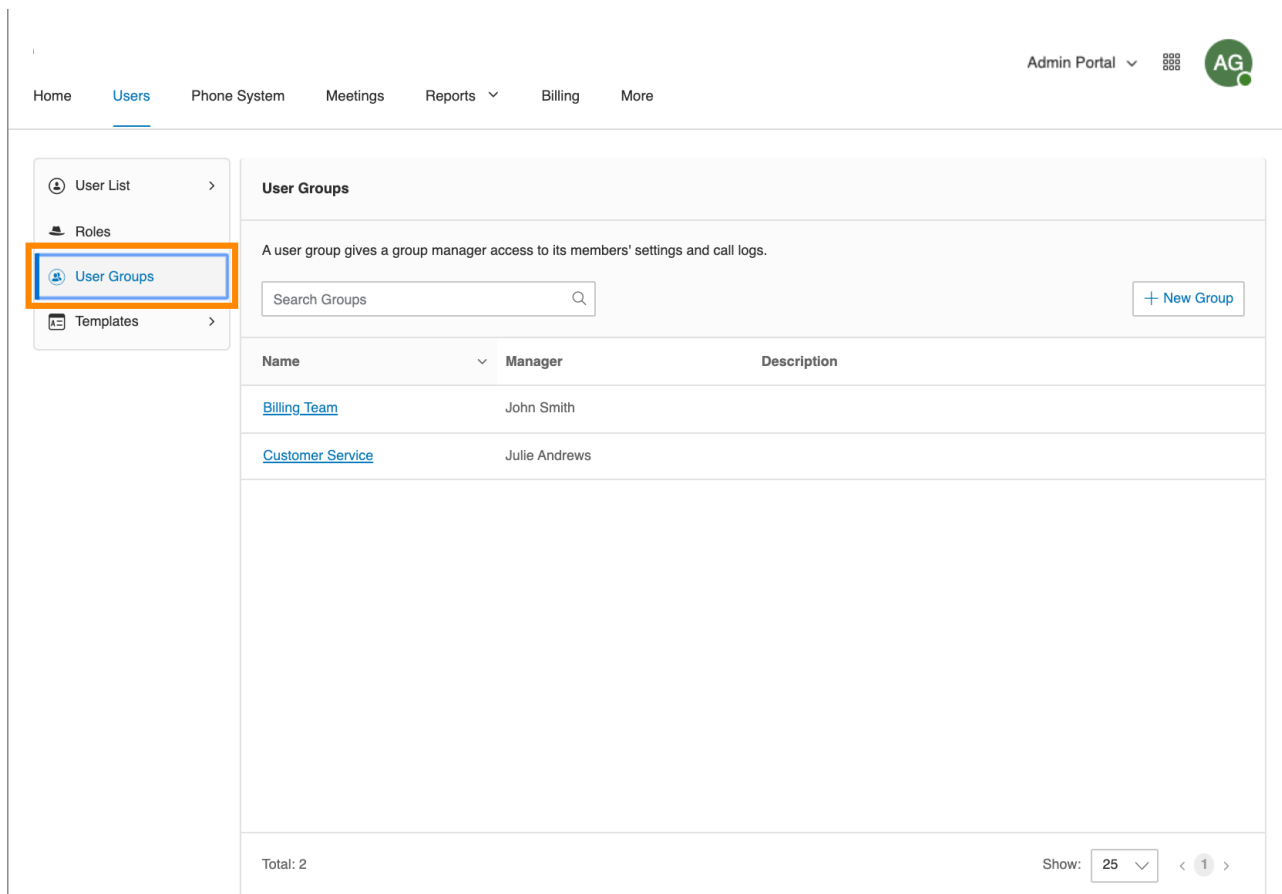
Managing user groups

A RingCentral User Group associates users based on organization hierarchy. A group is managed by a user group manager who accesses and modifies group members' settings and views their call logs. The account administrator controls who gets access to view or create user groups.

The account administrator creates multiple groups as required for your organization. A flat, non-nested group structure is supported. Users may belong to multiple groups. For example, for a director with two team managers (and their team members), you might create three user groups: one group for each of the team managers, and an overall group for the director that includes all reporting members.

When a user is assigned to be a user group manager, the user automatically inherits certain permissions. These permissions work in conjunction with the role assigned to the user in the Roles section of user administration. You must ensure that the primary role has the correct permissions so that user access is controlled when the user is given user group manager access.

Note: This feature is available for RingCentral MVP Premium and Ultimate only.



The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Users' link is currently selected. On the right side of the header, there is an 'Admin Portal' dropdown, a grid icon, and a profile icon labeled 'AG'.

The left sidebar contains a menu with the following items: 'User List', 'Roles', 'User Groups' (highlighted with an orange box), and 'Templates'. The 'User Groups' item is the active selection.

The main content area is titled 'User Groups'. Below the title, there is a descriptive text: 'A user group gives a group manager access to its members' settings and call logs.' Below this text is a search bar labeled 'Search Groups' and a '+ New Group' button.

The main content area also features a table with the following columns: 'Name', 'Manager', and 'Description'. The table contains two rows of data:

Name	Manager	Description
Billing Team	John Smith	
Customer Service	Julie Andrews	

At the bottom of the table, there is a 'Total: 2' label. On the right side of the bottom, there is a 'Show: 25' dropdown menu and a pagination control showing '< 1 >'.

The tasks involved in managing user groups include:

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

Creating a user group

When you create a user group, you organize a group of users by adding members to the group and assigning a group manager who can modify members' settings and view their call logs. The manager must at minimum have User Admin role and permission to access the group manager interface.

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

The screenshot illustrates the process of creating a user group in the RingCentral Admin Portal. It is divided into two parts: the main portal interface and a modal window.

Main Portal Interface:

- Top Navigation:** Includes 'Home', 'Users' (highlighted with a red circle 1), 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Admin Portal' dropdown and a user profile icon 'AG' are on the right.
- Left Sidebar:** Contains 'User List', 'Roles', 'User Groups' (highlighted with a red circle 2), and 'Templates'.
- User Groups Section:**
 - Header: 'User Groups' with a description: 'A user group gives a group manager access to its members' settings and call logs.'
 - Search: A 'Search Groups' input field.
 - Buttons: A '+ New Group' button (highlighted with a red circle 3).
 - Table:

Name	Manager	Description
Billing Team	John Smith	
Customer Service	Julie Andrews	

Create User Group Modal:

- Title:** Create User Group
- Progress:** 1 Describe User Group (active), 2 Add Members, 3 Select Group Manager.
- Form Fields:**
 - Name:** A text input field (highlighted with a red circle 4).
 - Description:** A text area with placeholder text: 'Add a brief description for your group. You may consider including details about the permissions or types of users in this group.'
- Buttons:** 'Cancel' and 'Next' (highlighted with a red circle 5).

6. Add members to the user group. Search by department or all departments, and check to select the users.
7. Click **Next**.
8. Select a member of the user group to be the user group manager. (The manager must be a member of the user group).
9. Click **Done**.

The user group is created, and a confirmation message is displayed. The user group's name and manager are displayed in the User Groups view.

Create User Group

✓ Describe User Group

2 Add Members

3 Select Group Manager

Search

Department: All

Sites

Show All | Show Selected (2)

	Name	Ext.	Roles	Department
<input type="checkbox"/>	Aaron Lee	11113	Marketing QA	
<input type="checkbox"/>	Ada Smith	100	Marketing QA	
<input type="checkbox"/>	Allen Test	11138	Marketing QA	
<input type="checkbox"/>	Anne Smith	11129	Standard (International)	
<input type="checkbox"/>	Billing qwerty	11127	Standard (International)	
<input checked="" type="checkbox"/>	Bob Smith	11107	Billing Admin	
<input type="checkbox"/>	EA Phone	11106	Standard (International)	
<input type="checkbox"/>	Executive Jones	11120	Standard (International)	
<input type="checkbox"/>	Executive Smith	11125	Standard (International)	q
<input checked="" type="checkbox"/>	Jack Manning	11108	Standard	KB

Total: 29

< 1 2 3 >

Back

Next

Create User Group

✓ Describe User Group

✓ Add Members

3 Select Group Manager

The group manager will have access to the settings and call logs of the group members.

Search

Department: All

Sites

Select	Name	Site	Ext.	Roles	Department
<input type="radio"/>	Bob Smith	Company	11107	Billing Admin	
<input checked="" type="radio"/>	Jack Manning	Company	11108	Standard	KB

Total: 2

< 1 >

Back

Done

Editing or deleting a user group

To edit an existing user group:

1. Click the **Users** tab from the **Admin Portal**.
2. Click **User Groups**.
3. Select an existing group from the list.
4. On the **Overview** page, click **Edit** to change the name or description of the user group. To change the manager of the user group, click **Change**, select a new manager, and click **Done**.
5. Click **Save** to save the group's changes.
6. On the **Members** page, add or remove members from the group as needed. To add a member click **Add Member**, select members to be added, and click **Add**.

To delete a user group, click **Delete** and confirm the deletion. Deleting a group will result in members being removed from the group and the group manager losing some privileges.

The top screenshot shows the 'User Groups' page in the Admin Portal. The 'Users' tab is selected (1). The 'User Groups' link in the left sidebar is highlighted (2). The 'Customer Service' group is selected in the list (3). The bottom screenshot shows the 'Overview' page for the 'Customer Service' group. The 'Overview' link in the left sidebar is highlighted (4). The 'Members' link is also visible (5). The 'Edit' button in the top right corner is highlighted (6). The 'Name' field contains 'Customer Service' and the 'Group Manager' is 'Julie Andrews | Ext 11105'. The 'Description' field is empty. The 'Change' button is highlighted. The 'Delete', 'Cancel', and 'Save' buttons are at the bottom.

Admin Portal

Home Users Phone System Meetings Reports Billing More

User Groups

A user group gives a group manager access to its members' settings and call logs.

Search Groups

+ New Group

Name	Manager	Description
Billing Team	John Smith	
Customer Service	Julie Andrews	

Admin Portal

Home Users Phone System Meetings Reports Billing More

< Back Customer Service Edit

Overview Members

Name: Customer Service

Description:

Group Manager: Julie Andrews | Ext 11105

Change

Note: The group manager is entitled to access settings and call logs of all group members

Delete Cancel Save

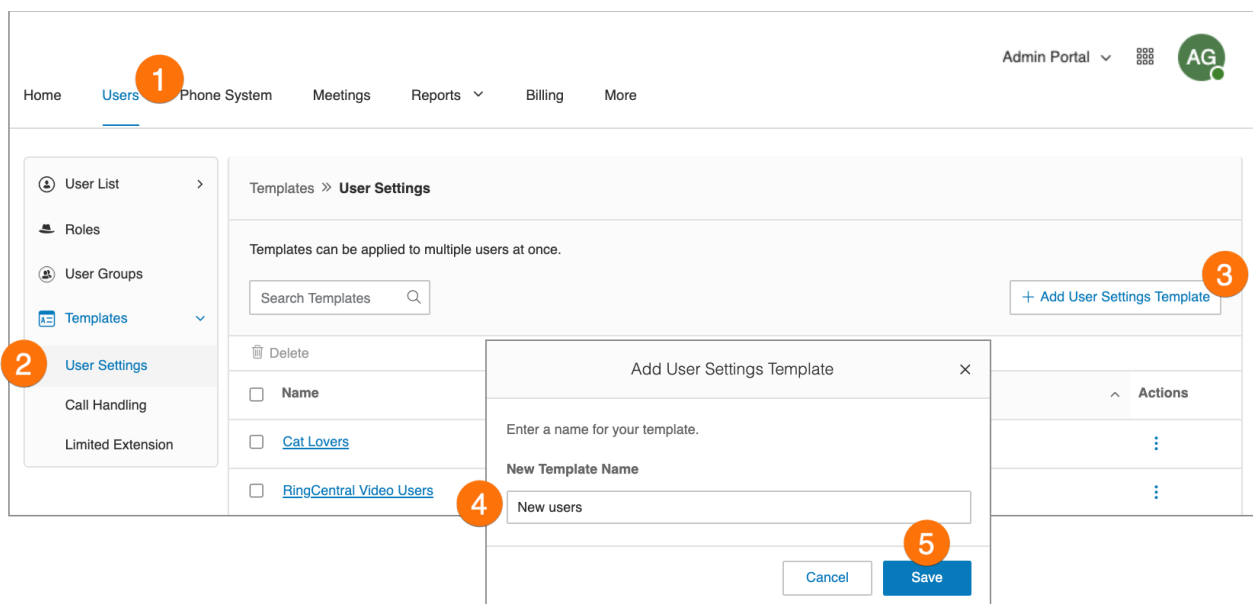
Managing templates

RingCentral Templates will save you time and repetitive manual effort by streamlining your administrative routine. There are two types of templates, one for user settings and another for specifying call handling rules. Create a template and apply it to users as you need.

Creating a template for user settings

To create a template for user settings, follow these steps:

1. Click the **Users** tab from the **Admin Portal**.
2. Click **Templates > User Settings**.
3. Click **Add User Settings Template**.
4. Enter a **New Template Name**.
5. Click **Save**.



6. Select a template from the left pane. You see options you can set for this template in the right panel, grouped into categories of settings for **Inbound** and **Outbound** calling and **Notifications**. For each group of settings, you can specify whether the settings override each users' settings by checking **Override User Settings**.
7. Configure **Template Information** settings. Under **New Template Name**, edit the name of your template and see the last time it was modified and when it was created.
8. Configure **User Details** settings:
 - a. **Regional Settings**: Select regional settings for users such as time zone and time format.
 - b. **User Hours**: Set user hours to 24 hours or specify hours.
 - c. **Roles**: Select the role to be applied to the users. Roles give admins the ability to control what users can do within the system. A role is a collection of permissions that could be based on a job function.
 - d. **User Groups**: Select the user groups where the user is to have a membership.
 - e. **Site**: Select site (applicable to multi-site accounts).
 - f. **Confirmation Message**: Specify how long the confirmation message will appear after a successful operation is finished. You have the option to disable this feature.
 - g. **Job Title**: Specify the job title.
 - h. **Single-Sign on**: Enforce SSO for users on the account.
 - i. **Video Service**: Select the meetings service you want to use in your web portal, RingCentral app, and integrations.
 - j. **Receive Communications from RingCentral**: Select if users receive voicemail messages from RingCentral on product education.

Templates » **User Settings**

Templates can be applied to multiple users at once.

Search Templates [+ Add User Settings Template](#)

Delete

6 ☐ Name

☐ [New users](#)

☐ [Cat Lovers](#)

☐ [RingCentral Video Users](#)

☐ [Support](#)

☐ [Call Queue Manager](#)

☐ [Zfa](#)

☐ [HD](#)

☐ [da](#)

☐ [Technical Support](#)

☐ [Customer Service](#)

☐ [asdasd](#)

☐ [1](#)

< 1 >

7 **New users**

[Inbound](#) [Outbound](#) [Notifications](#)

Template Information

New users

[Inbound](#) [Outbound](#) [Notifications](#)

Template Information

Template Name

Last Modified 07/24/2020 at 3:07 pm by John Smith Created 07/24/2020 at 3:07 pm by John Smith

8 **New users**

[Inbound](#) [Outbound](#) [Notifications](#)

Template Information

User Details

Settings & Permissions

Regional Settings

GMT-08:00, English (U.S.)

[Edit](#)

☐ Override User Settings

Roles

Marketing QA

[Edit](#)

☐ Override User Settings

Site

Company

[Edit](#)

☐ Override User Settings

Job Title

☐ Override User Settings

User Hours

24 hours

[Edit](#)

☐ Override User Settings

User Groups

None

[Edit](#)

☐ Override User Settings

Confirmation Message

3 seconds

[Edit](#)

☐ Override User Settings

Video Service

RingCentral Video

[Edit](#)

☐ Override User Settings

9. Configure **Phones** settings.

- a. **Appearance:** Select extensions to display on desk phones and softphones.
- b. **Permissions:** Select users permitted to answer calls of the other extensions.
- c. **Emergency Address:** Provide a physical address for first responders.
- d. **Bandwidth Settings:** To improve the quality of your calls, you can set how much network bandwidth to use for calls:
 - *High Bandwidth* - gives you better sound quality but calls can become choppy when it's not available.
 - *Low Bandwidth* - gives you lower sound quality but ensures no interruptions during your conversation.

New users [Close]

Inbound Outbound Notifications

Template Information

User Details

9 Phones

Presence Settings

Appearance

User's phone will be rebooted to reflect the presence changes made. If a call is in progress, the phone will reboot after it completes.

[Edit]

☐ Override User Settings

Permissions

[Edit]

☐ Override User Settings

Emergency Address

Select a country for Emergency Address provisioning.

US/Canada/Puerto Rico [v]

You will overwrite the currently provisioned Emergency Address. This operation is not recommended for addresses outside the user's home country.

Address

None

[Edit]

☐ Override User Settings

Bandwidth Settings ⓘ

Data Usage

High [v]

☒ Use HD Voice if possible

☐ Override User Settings

10. Configure **Screen, Greeting, and Hold Music** settings.

- a. **User Greeting:** Turn on this option when you want the system to answer the call with a recorded welcome message, so callers know they've reached the right person. This is not a personal voicemail announcement.
- b. **Call Screening:** Turn on this option when you want callers to announce their name before continuing to connect the call. This option lets you identify the caller so you can pick up the call immediately. After turning on this option, go to **Call Forwarding and Voicemail > Settings > Incoming Call Information** to set your preferences.
- c. **Connecting Message:** Set a recorded message you want callers to hear to let them know the call will now be transferred to your line.
- d. **Audio While Connecting:** Incoming callers will hear the music selection that is configured with this setting. The music selection callers will hear when they are placed on hold can be set in the Hold music selection. Note that the **Audio While Connecting** setting is applied on a rule basis, whereas the **Hold Music** setting is applied for all calls.
- e. **Hold Music:** Turn on this option when you want callers to hear music whenever you put a call on hold.

New users

InboundOutboundNotifications

Template Information

User Details

Phones

Screening, Greeting & Hold Music

User Greeting ⓘ
☐ Enable
☐ Override User Settings
Connecting Message ⓘ
☒ Enable
Default
00:00 / 00:00
Default Message: "Please hold while I try to connect you."
Edit
☐ Override User Settings
Hold Music ⓘ
☒ Enable
Music: Acoustic
00:00 / 00:00
Edit
☐ Override User Settings

Call Screening ⓘ
☐ Enable
☐ Override User Settings
Audio While Connecting ⓘ
☒ Enable
Music: Acoustic
00:00 / 00:00
Music or Ringtone callers will hear while connecting
Edit
☐ Override User Settings

11. Configure **Call Forwarding and Voicemail** settings. Under **Desktop & Mobile Apps**, specify whether to notify your Desktop and apps before forwarding the incoming call to your desk phones and forwarding numbers, and specify a wait time.

New users

Inbound

Outbound

Notifications

Template Information

User Details

Phones

Screening, Greeting & Hold Music

11 ^ Call Handling & Forwarding

User Hours

After Hours

Settings

Desktop & Mobile Apps

☒ Notify my Desktop & Mobile Apps ⓘ

Wait Time

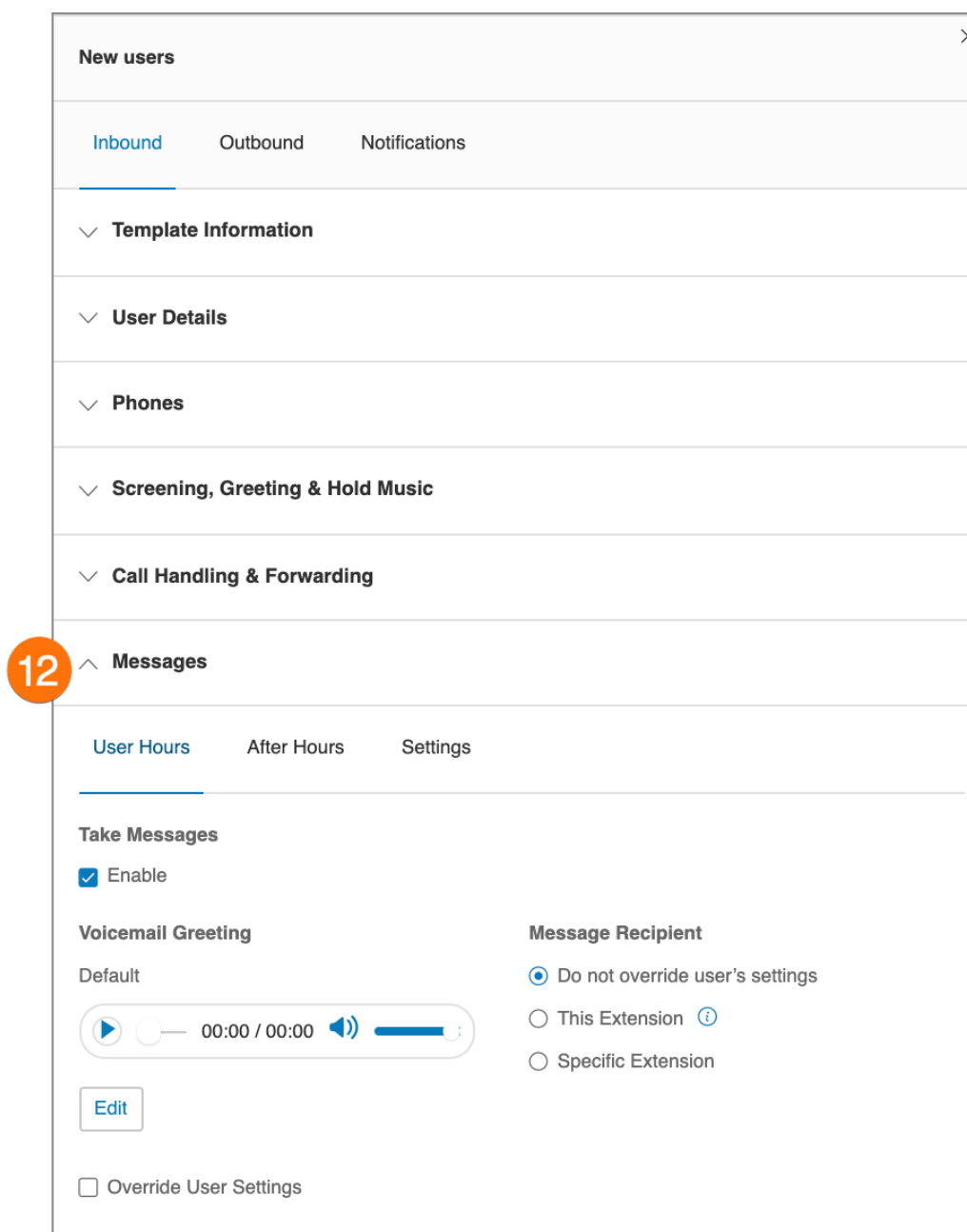
Select the time before forwarding begins

1 Ring / 5 Secs ▾

☐ Override User Settings

12. Configure **Messages** settings.

- a. **Take Messages:** Allow or deny users to take voicemail messages; specify a default or custom voicemail greeting.
- b. **Voicemail Greeting:** Specify a default voicemail greeting.
- c. **Message Recipient:** Select the recipient of voicemail messages.
- d. **This extension:** Select users to be included as message recipients when applying a template.
- e. **Specific extension:** Select an extension to be the recipient of voicemail messages.



New users ×

[Inbound](#) [Outbound](#) [Notifications](#)

✓ **Template Information**

✓ **User Details**

✓ **Phones**

✓ **Screening, Greeting & Hold Music**

✓ **Call Handling & Forwarding**

12 ^ **Messages**

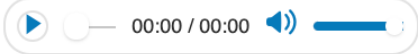
[User Hours](#) [After Hours](#) [Settings](#)

Take Messages

☒ Enable

Voicemail Greeting

Default



[Edit](#)

☐ Override User Settings

Message Recipient

☒ Do not override user's settings

☐ This Extension ⓘ

☐ Specific Extension

14. Click the **Notifications** tab to configure the notifications settings. Select each of the following if you want to be notified by email.

- a. **Voicemail Messages**
- b. **Received Faxes**
- c. **Missed Calls**
- d. **Fax Transmission Results**
- e. **Received Text Messages**

15. Click **Save**.

New users ×

Inbound Outbound **Notifications** 14

Voicemail Messages

- ☒ Notify by Email
- ☐ Include attachment with email
- ☐ Mark message as read once emailed

Received Faxes

- ☒ Notify by Email
- ☐ Include attachment with email
- ☐ Mark message as read once emailed

Missed Calls

- ☐ Notify by Email

Fax Transmission Results

- ☒ Notify by Email

Received Text Messages

- ☒ Notify by Email

☐ Override User Settings

Delete Template Cancel Save

Creating a template for Call Handling settings

1. Click the **Users** tab from the **Admin Portal**.
2. Click **Templates**.
3. Click **Call Handling**.
4. Click **Add Call Handling Template**.
5. Enter a **New Template Name**.
6. Click **Next**.
7. Specify the caller ID or date conditions that will trigger the application of this template.
8. Click **Next**.
9. Specify the action to take when incoming calls match this rule.
10. Click **Save**.

The screenshots illustrate the process of creating a Call Handling Template:

- Screenshot 1:** Shows the **Users** tab selected in the Admin Portal. The **Templates** link is highlighted in the left sidebar.
- Screenshot 2:** Shows the **Call Handling** section under Templates. The **+ Add Call Handling Template** button is highlighted.
- Screenshot 3:** Shows the **Add Call Handling Template** dialog box. The **New Template Name** field is highlighted.
- Screenshot 4:** Shows the **Add Call Handling Template** dialog box. The **Next** button is highlighted.
- Screenshot 5:** Shows the **Add Call Handling Template** dialog box. The **Caller ID** section is highlighted.
- Screenshot 6:** Shows the **Add Call Handling Template** dialog box. The **Next** button is highlighted.
- Screenshot 7:** Shows the **Add Call Handling Template** dialog box. The **Next** button is highlighted.
- Screenshot 8:** Shows the **Add Call Handling Template** dialog box. The **Next** button is highlighted.
- Screenshot 9:** Shows the **Add Call Handling Template** dialog box. The **Next** button is highlighted.
- Screenshot 10:** Shows the **Add Call Handling Template** dialog box. The **Next** button is highlighted.

Applying a template to users

There are several ways to apply a template to users.

Applying a template via Users List

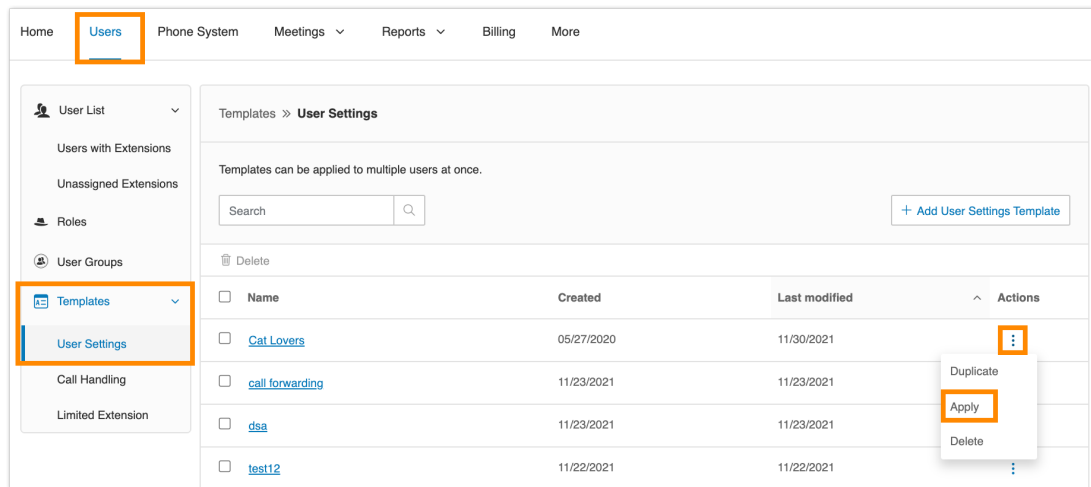
1. Click the **Users** tab from the **Admin Portal**.
2. Select the number of users.
3. Click **Apply Templates**.
4. Select a template to apply.
5. Click **Apply Template**.
6. Click **Continue** to confirm that you are about to make settings changes for all the selected user(s).
This will overwrite any configuration the user might have done previously.
7. An email will be sent to you when it's completed. You may choose to notify active users of the change by email and also add more recipients. Click **Apply Template**.

The screenshot illustrates the process of applying a template to users in the RingCentral Admin Portal. The interface is divided into several sections:

- Top Navigation Bar:** Includes links for Home, Users (highlighted with a red circle 1), Phone System, Meetings, Reports, Billing, and More. The Admin Portal dropdown and user profile are also visible.
- Left Sidebar:** Contains navigation options like User List, Users with Extensions (highlighted with a red circle 2), Unassigned Extensions, Roles, User Groups, and Templates.
- Main Content Area:** Displays the 'Users List' for 'Users with Extensions'. It includes a search bar, a 'More' dropdown, and buttons for '+ Add User', 'Download User List', and 'Apply Templates' (highlighted with a red circle 3). Below this is a table of users with columns for Status, Name, Number, Ext., Roles, Department, Site, Msg., and Actions. Three users are listed: Aaron Lee, Ada Smith, and Allen Test.
- Select Template Modal:** A window titled 'Select Template' with a search bar and a dropdown menu. It lists various templates such as 'User Settings', 'RingCentral Video Users', and 'Unconditional Forwarding'. The 'New users' template is selected (highlighted with a red circle 4).
- Apply Template Confirmation Modal:** A window titled 'Apply Template Confirmation' with a message: 'You are about to make setting changes for the selected user(s). This overwrites any configurations previously made. Are you sure you want to continue?'. It includes 'Cancel' and 'Continue' buttons (highlighted with a red circle 7).
- Bottom of Select Template Modal:** Shows a 'Total: 13' count, a 'Show: 25' dropdown, and a 'Page 1' indicator. The 'Apply Template' button is highlighted with a red circle 5.

Applying a template via User Settings under Templates

1. Go to **Users > Templates > User Settings**.
2. Click the more icon opposite the Template that needs to be applied to User/s and select **Apply**.



3. Select the Users who should be assigned to the selected template on the Apply Template pop-up window.
4. Click **Apply**.
5. Click **Continue** on the prompt to confirm that the template will be applied to the selected Users.
6. An email will be sent when the template application is complete. You can tick on the box to notify only active users. You can also enter additional recipients in the box. Click **Apply Template** when done.

Applying a template via User Details

1. Go to **Users > User with Extensions**.
2. Select a user to whom you want to apply a template.
3. Go to **User Details > Settings & Permissions**.
4. Click **Apply** under **Template**.

5. Select a Template from the popup window.
6. Click **Apply Template**.

Managing the Phone System

The **Phone System** tab houses all of the main settings for your entire phone system. Here you will find settings for:

- Company Info
- Phone Numbers
- Auto-Receptionist
- Multi-Level Auto-Receptionist
- Groups
- Phones & Devices
- Emergency Calling
- Automatic Location Updates

[Home](#)
[Users](#)
[Phone System](#)
[Meetings](#)
[Reports](#)
[Billing](#)
[More](#)

Admin Portal

Company Info

Phone Numbers >

Auto-Receptionist >

Groups >

Phones & Devices >

Emergency Calling >

Ext.	Name/Type	Address	Site Code	Actions
	Main Site		11	
12005	Something New	234 MAIN ST, STE A, CHARLESTOWN, MA, 02129, United States	12	

Company Info

Your account may be a single-site account or may contain multiple sites when you have enabled RingCentral Multi-Site Support. With a single-site account, the Company Info page displays the settings for your account, including Company Address, Caller ID Name, and Directory Assistance. Select the appropriate tab to access each section.

Managing Sites with Multi-Site Support

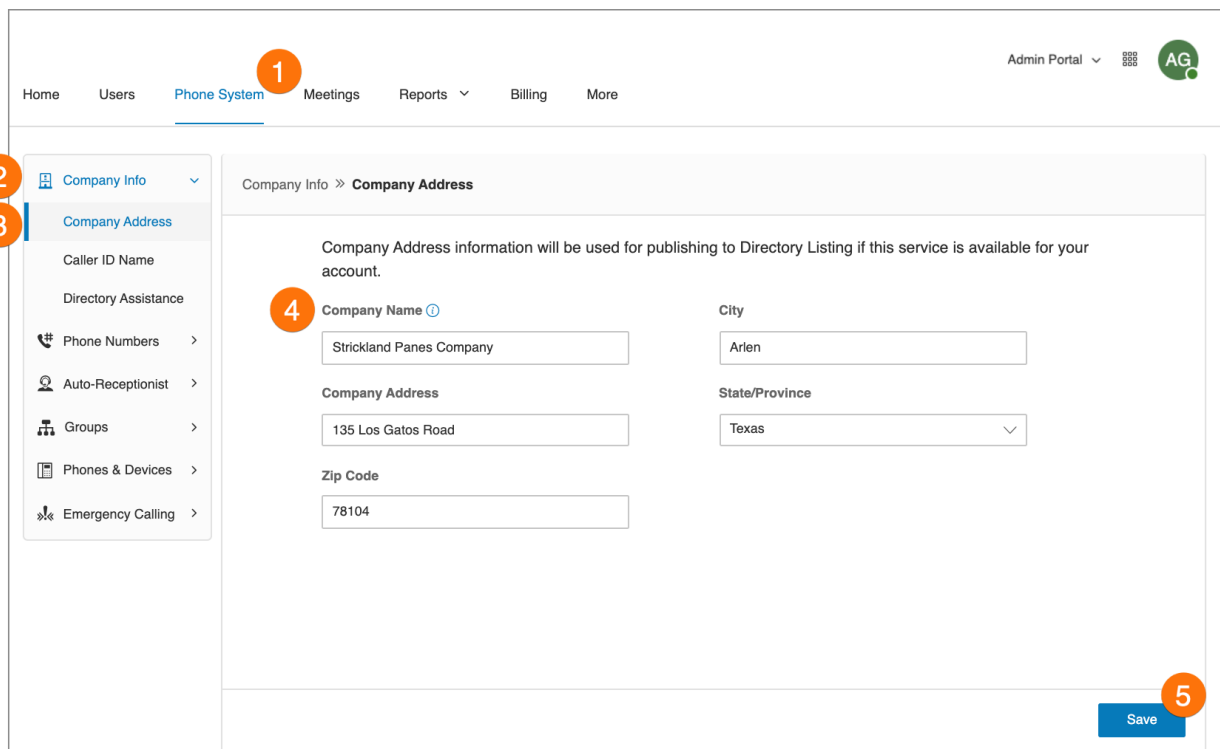
When you have enabled RingCentral Multi-Site Support, the user interface displays each of the configured sites in your account and allows you to create a new site (by selecting **New Site** or **Bulk Site Create**) or edit the information for any of your existing sites (by selecting the site from the list). Site filter controls are also available from pages that contain site assets.

The screenshot displays the RingCentral Admin Portal interface. At the top, there is a navigation bar with links: Home, Users, Phone System (highlighted), Meetings, Reports, Billing, and More. On the right of the navigation bar, there is an 'Admin Portal' dropdown, a grid icon, and a user profile icon labeled 'AG'. Below the navigation bar, a sidebar menu is visible with the following items: Company Info (highlighted with an orange box), Company Address, Caller ID Name, Directory Assistance, Phone Numbers, Auto-Receptionist, Groups, Phones & Devices, and Emergency Calling. The main content area shows the 'Company Info' page with the 'Company Address' tab selected. The page title is 'Company Info » Company Address'. A note states: 'Company Address information will be used for publishing to Directory Listing if this service is available for your account.' Below this, there are input fields for 'Company Name' (containing 'Strickland Pane Company'), 'City', 'Company Address', 'State/Province' (a dropdown menu with 'Select' chosen), and 'Zip Code'. A 'Save' button is located at the bottom right of the form.

Company address

Set your Company Address information for the default company name and your company address for a Directory Listing (if available for your account).

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Company Info**.
3. Click **Company Address**.
4. Enter your **Company Name** and **Company Address** with **City**, **State**, and **Zip Code**.
5. Click **Save**.



The screenshot displays the RingCentral Admin Portal interface for configuring the company address. The top navigation bar includes 'Home', 'Users', 'Phone System' (1), 'Meetings', 'Reports', 'Billing', and 'More'. The left sidebar shows 'Company Info' (2) and 'Company Address' (3). The main content area is titled 'Company Info » Company Address'. It contains a note: 'Company Address information will be used for publishing to Directory Listing if this service is available for your account.' Below this, there are input fields for 'Company Name' (4), 'City', 'Company Address', 'State/Province', and 'Zip Code'. The 'Save' button is located at the bottom right (5).

Field	Value
Company Name	Strickland Panes Company
City	Arlen
Company Address	135 Los Gatos Road
State/Province	Texas
Zip Code	78104

Caller ID Name

Set your Company Caller ID to your company's name so that your customers will know who is calling them. This name, along with the phone number, is displayed to the called party whenever an outbound call is made using the local number as the caller ID.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Company Info**.
3. Click **Caller ID Name**.
4. Enter your company name exactly the way you want it to appear on Caller ID displays, for local calls made from your main company phone number. You can enter up to 15 characters.
5. Click **Save**.

Note: Outbound Caller ID cannot be set for an individual number or digital line. It is only available for local numbers and not toll-free numbers.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with an orange circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. On the right, there is an 'Admin Portal' dropdown and a user profile icon labeled 'AG'. A left-hand sidebar contains a 'Company Info' section (highlighted with an orange circle 2) which includes 'Company Address', 'Caller ID Name' (highlighted with an orange circle 3), 'Directory Assistance', 'Phone Numbers', 'Auto-Receptionist', 'Groups', 'Phones & Devices', and 'Emergency Calling'. The main content area is titled 'Company Info » Caller ID Name'. It contains a descriptive text block (highlighted with an orange circle 4) stating: 'This name along with the phone number will be displayed to the called party whenever an outbound call is made using the local number as the caller ID. Max 15 characters. Note: Does not apply to toll-free numbers.' Below this text is a text input field containing the value 'RINGCENTRAL'. At the bottom right of the main content area, there is a blue 'Save' button (highlighted with an orange circle 5).

Directory Assistance

Directory Assistance is a free and convenient way to publish your business name, address, main number, and main fax number to increase your company's visibility in local directory assistance listings. For more information about Directory Listing, see Directory Listing Frequently Asked Questions. To publish your information:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Company Info**.
3. Click **Directory Assistance**.
4. Enter your listing information.
5. Click **Next**.
6. Check the box next to **I agree to the terms of service**.
7. Click **Publish**.

Note: Allow five business days for your listing to appear. Edit or delete your listing any time by following these same steps.

The following information will be submitted to Directory Assistance:

Main Number: (409) 240-1234

Company Name: Strickland Panes Company

City: Belmont

Company Address: 20 Davis Dr

State/Province: California

Zip Code: 94002

Email:

Status: Unpublished

Note: If you change the details on this screen, the information will also be updated in the Company Address.

List your business phone number and address in Directory Assistance:

Features:

- Publish your Company Name, Number and Address
- Enable potential customers to readily find your business

[Directory listing overview >](#)

Next

The following information will be submitted to Directory Assistance:

Main Number: (409) 240-1234

Company Name: Strickland Panes Company

City: Belmont

Company Address: 20 Davis Dr

State/Province: California

Zip Code: 94002

Email:

The terms of service for Directory Assistance can be found in the RingCentral End User License Agreement and Terms of Service, available at: <https://www.ringcentral.com/legal/updates.html>.

Please confirm that you agree to these terms by checking the box:

☒ I agree to the terms of service.

List your business phone number and address in Directory Assistance:

Features:

- Publish your Site Name, Number and Address
- Enable potential customers to readily find your business

[Directory listing overview >](#)

Back Publish

Phone Numbers

The Phone Numbers tab allows you to view your numbers by category of number, and add additional numbers to your account.

The tabs contain these types of numbers:

- **All Numbers:** Includes all numbers in your account.
- **Numbers in Use:** Numbers currently assigned to an extension or a device.
- **Number Inventory:** Numbers that are not assigned to a user extension or device.
- **Transferred and Vanity:** Existing numbers that have been transferred, and vanity numbers to help customers remember your business phone number.

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info

Phone Numbers

- All Numbers
- Numbers in Use
- Number Inventory
- Transferred and Vanity

Auto-Receptionist

Groups

Phones & Devices

Emergency Calling

Phone Numbers » All Numbers

This list includes all numbers in your account. [Learn More](#)

Company Main: [\(409\) 240-2563](#) Company Fax: [Add](#)

Search [] [] []

+ Add Number []

Assign to Move to Inventory Delete

	Number	Name	Assigned to	Ext.	Site	Location	Type	Actions
<input type="checkbox"/>	(214) 884-3108				Company	United States, D...	Inventory	[]
<input type="checkbox"/>	+44 (800) 3688...		Joe Hall	11102	Company	United Kingdom...	Direct Number	[]
<input checked="" type="checkbox"/>	(409) 200-2364		Buck Strick	11101	Company	United States, B...	Desk Phone	

Adding company numbers

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

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **All Numbers**.
4. Click **Add Number**.
5. Select a **Location** and follow these instructions for the **Number Type** you choose:
 - **Local Number**: Provide the **State** and **Area Code**. Select one or more numbers and click **Add Numbers**.
 - **Toll-Free Number**: Select a toll-free prefix. Note that there is a \$30 one-time setup fee per number if you select 800 as your toll-free prefix. Select one or more numbers and click **Add Numbers**.
 - **Vanity Number**: Enter a number that helps customers remember your business phone number. Click **Search** to check availability. Select a number and click **Add Numbers**.
6. Click **Next**.
7. Select **Auto-Receptionist** to assign the number as a company number.
8. Click **Next**.
9. Review any changes to your number plan. Check the acknowledgment box.
10. Click **Next**.

The screenshot displays the RingCentral Admin Portal interface for adding a company number. The process is guided by numbered steps 1 through 10. Step 1 involves selecting a location and number type. Step 2 involves assigning the number to an extension. Step 3 involves confirming the order. Step 4 involves reviewing the charges and credits. The interface includes a sidebar with navigation options and a main content area with the 'Add Numbers' modal. The modal shows a list of available numbers for selection, with filters for Location and Number Type. The 'Assign to Ext.' modal shows the selection of 'Auto-Receptionist' as the assignment method. The 'Confirm Order' modal shows a summary of the charges and credits, including a table for 'Charges and credits' and a table for 'Taxes'. The 'Order Confirmation' modal shows a final summary of the charges and credits, including a table for 'Charges and credits' and a table for 'Taxes'.

Adding assigned numbers

Under Numbers in Use, you will see all of the numbers assigned to a user that has been set for your phone system. From here, you can add a number.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **Numbers in Use**.
4. Click **Add Number**.
5. Select a **Location** and follow these instructions for the **Number Type** you choose:
 - *Local Number*: Provide the **State** and **Area Code**. Select one or more numbers and click **Add Numbers**.
 - *Toll-Free Number*: Select a toll-free prefix. Note that there is a \$30 one-time setup fee per number if you select 800 as your toll-free prefix. Select one or more numbers and click **Add Numbers**.
 - *Vanity Number*: Enter a number that helps customers remember your business phone number. Click **Search** to check availability. Select a number and click **Add Numbers**.
6. Click **Next**.
7. Select **Extension** to assign the number, and then select the extension you want to assign it to.
8. Click **Next**.
9. Review any changes to your number plan. Check the acknowledgment box.
10. Click **Next**.

Forwarding a number

You can maintain your phone number with your current provider and forward calls automatically to your RingCentral account.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **All Numbers**.
4. Click the more three-dot icon beside **Add Number**.
5. Select *Forward Number*.
6. Enter your existing phone number and click **Next**.
7. Select where you would want to forward the calls to. The options are **Auto-Receptionist** and **Extension**. If you selected **Extension**, select an extension.
8. Click **Next**.
9. Review the information about ordering **Busy Call Handling** and **No Answer Call Handling** from your local telephone company, and the local telephone company charges.
10. Click **Done**.

1 Admin Portal

Home Users **Phone System** Meetings Reports Billing More

2 Company Info
3 Phone Numbers
All Numbers
Numbers in Use
Number Inventory
Transferred and Vanity
Auto-Receptionist
Groups
Phones & Devices
Emergency Calling

Phone Numbers > All Numbers

This list includes all numbers in your account. [Learn More](#)

Company Main: (409) 240-2563 Company Fax: Add

Search [] []

Assign to Move to Inventory Delete

+ Add Number Forward Number Download All Numbers

6 Forward My Calls to RingCentral

1 Enter Existing Numbers 2 Assign to Ext. 3 Confirmation

To maintain your phone number with your current provider, and forward calls automatically to your RingCentral account.

Existing Phone Number
8505551234

Cancel Next

7 Forward My Calls to RingCentral

✓ Enter Existing Numbers 2 Assign to Ext. 3 Confirmation

Your phone number will be added to RingCentral account as forwarding number.

Inbound Calls → (850) 367-1234 If my line is BUSY or I DO NOT ANSWER → RingCentral Auto-Receptionist

Forward calls from (850) 367-1234 to:

☒ Auto-Receptionist
☐ Extension

Back Next

9 Forward My Calls to RingCentral

✓ Enter Existing Numbers ✓ Assign to Ext. 3 Confirmation

Your RingCentral phone system is now configured to accept calls from your (850) 367-1234 number.

In order for RingCentral to answer your existing home or home office telephone line, you will need to order Busy Call Handling and No Answer Call Handling* from your local telephone company. Please print this screen for easy reference.

Ordering Call Handling

1. Contact your local telephone company's Customer Service department and request that the telephone features Busy Call Handling and No Answer Call Handling* be installed on your telephone line.
2. Be sure to indicate that you would like **Fixed** call handling, and not variable or basic.
3. Your telephone company will ask you to which number you would like your calls forwarded. This number is (409) 240-2563.
4. The telephone company must enter this forwarding number exactly as listed, including the "1" before the 409 number. In order for RingCentral to work. Ask the Customer Service Representative to repeat the number back to you to verify that it was entered into their system correctly.
5. When ordering No Answer Call Handling, you must choose how many rings you would like to hear before your calls are forwarded to RingCentral. You may choose as many or as little as you like, however we recommend that you set it to four (4) rings.

* If the Customer Service Representative says these features are not available, ask to speak to a supervisor. These features are available almost everywhere in the US.

Telephone Company Charges

Your local phone company may charge you a small activation fee and an ongoing monthly fee for these call handling services. Please check with your phone company for details on these charges.

Print Done

10

Naming phone numbers

Admins can assign phone numbers with “nicknames” for reference or organization purposes. This allows them to efficiently search by their name in the Phone Numbers tab.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **Numbers in Use**.
4. Click the number that you want to assign a name to.
5. Enter a name on the **Name** field.
6. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Phone System' tab is selected, indicated by a red circle 1. The left sidebar shows the 'Phone Numbers' menu, with 'Numbers in Use' highlighted by a red circle 2. Below this, the 'Number Inventory' section is visible, with a red circle 3 highlighting the 'Numbers in Use' link. The main content area shows a table of 'Numbers in Use'. A red circle 4 highlights the row for the number (409) 200-2364, which is assigned to 'Buck Strick' at 'Company'. Below the table, a red circle 5 highlights the 'Name' field in the details section, which contains the text 'Buck desk phone'. At the bottom right, a red circle 6 highlights the 'Save' button.

Phone Numbers » Numbers in Use

This list includes only those numbers currently assigned to an extension or a device.

Company Main: (409) 240-2563 Company Fax: Add

Search [] [] [] + Add Number []

Assign to Move to Inventory Delete

Number	Name	Assigned to	Ext.	Site	Location	Type	Actions
+44 (800) 3888...		Joe Hall	11102	Company	United Kingdom...	Direct Number	
(409) 200-2364	Buck Strick	11101	Company	United States, B...		Desk Phone	
(409) 200-0429	Joe Hall	11102	Company	United States, K...		Desk Phone	
(409) 240-2117	Ext. with RingC...		Company	United States, B...		Unassigned Ext...	

Home Users Phone System Meetings Reports Billing More

Direct Number: (409) 200-2364

Phone Number: (409) 200-2364 Location: United States, Belmont, CA

Name: Buck desk phone

Site: Company

This phone number is assigned to the desk phone. Please go to phone properties to change settings and assignment.

Number Type: Voice and Fax

Assigned to: Other phone

Phone Properties

Cancel Save

Viewing unassigned numbers

Under Number Inventory, you will see all the numbers that are not assigned to a user extension or a device.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **Number Inventory**.
4. Filter the numbers by **Locations** and **Sites**.
5. Click a number to see more information.

You can view phone properties in the [Phones & Devices](#) tab.

The screenshot shows the RingCentral Admin Portal interface. At the top, the navigation bar includes links for Home, Users, Phone System (highlighted with a blue underline and a red circle with the number 1), Meetings, Reports, Billing, and More. On the right side of the navigation bar, there is an 'Admin Portal' dropdown menu (highlighted with a red rectangle) and a user profile icon labeled 'AG'.

On the left side, a sidebar menu contains the following items: Company Info, Phone Numbers (highlighted with a red circle with the number 2), All Numbers, Numbers in Use, Number Inventory (highlighted with a red circle with the number 3), Transferred and Vanity, Auto-Receptionist, Groups, Phones & Devices, and Emergency Calling.

The main content area is titled 'Phone Numbers > Number Inventory' (with a red circle with the number 4 next to 'Number Inventory'). Below the title, a message states: 'This Number Inventory includes all numbers which are not assigned to a user extension or device.' There is a search bar with a magnifying glass icon and a filter icon. A '+ Reserve Numbers' button is located on the right. Below the search bar, there are two dropdown menus: 'Locations' (highlighted with a red circle with the number 4) and 'Sites'.

A table of phone numbers is displayed below the filters. The table has columns for 'Number', 'Name', 'Site', 'Location', and 'Actions'. The first row is highlighted with a red circle with the number 5. The table contains three rows of data:

Number	Name	Site	Location	Actions
(214) 884-3108		Company	United States, Dallas, TX	⋮
(650) 422-3759		Company	United States, Atherton, Palo Alto, CA	⋮
+44 (1224) 012...		Company	United Kingdom, Aberdeen, ABD	⋮

You can see unassigned numbers that have a device under All Numbers and Numbers in Use by filtering them.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **All Number** or **Numbers in Use**.
4. Click the filter icon beside the search bar.
5. Click **Types**.
6. Select *Unassigned Extension*.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The right side of the top bar shows the Admin Portal dropdown and the AG logo. The left sidebar contains a list of navigation options: Company Info, Phone Numbers (highlighted with a red circle 2), All Numbers (highlighted with a red circle 3), Numbers in Use, Number Inventory, Transferred and Vanity, Auto-Receptionist, Groups, Phones & Devices, and Emergency Calling. The main content area is titled 'Phone Numbers >> All Numbers'. It includes a search bar and a filter icon (highlighted with a red circle 4). Below the search bar, there are dropdown menus for Locations (highlighted with a red circle 5) and Types. The Types dropdown menu is open, showing a list of options: All, Company Number, Desk Phone, Direct Number, Forwarded, Inventory, Shared Line, Softphone, and Unassigned Extension (highlighted with a red circle 6). The main content area also displays a table of phone numbers with columns for Number, Name, Ext., Site, Location, Type, and Actions. The table lists several numbers, including (236) 260-1084, (409) 200-2364, (409) 209-0429, +44 (20) 45325..., +44 (800) 3688..., (650) 650-1234, and (214) 884-3108.

Viewing transferred and vanity numbers

Under Transferred and Vanity, you will see the numbers that you have transferred, as well as vanity numbers.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **Transferred and Vanity**. Select **Transfer Orders**, **International Number Orders**, or **Pending Vanity Numbers**. Click a number to see more details.
4. To transfer a number to RingCentral, select **Transfer Numbers** under **Transfer Orders**. Select **US or US territory Local Number**, **US or US territory Toll-Free Number**, **Canadian Number**, or **International Number**. Complete the process.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with a red circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. On the right, there is an 'Admin Portal' dropdown and a user profile icon labeled 'AG'.

The left sidebar contains a list of menu items: 'Company Info', 'Phone Numbers' (highlighted with a red circle 2), 'All Numbers', 'Numbers in Use', 'Number Inventory', 'Transferred and Vanity' (highlighted with a red circle 3), 'Auto-Receptionist', 'Groups', 'Phones & Devices', and 'Emergency Calling'.

The main content area is titled 'Phone Numbers » Transferred and Vanity'. It includes a descriptive paragraph about transferred numbers and a link to 'Learn how to transfer your number'. Below this is a section for 'Transfer Orders' (highlighted with a red circle 4), which contains a search bar, a '# Transfer Numbers' button, and a table with columns: 'Status', 'Order Number', 'Date Created', and 'Date Completed'. The table currently shows 'No results'. At the bottom of the table, it indicates 'Total: 0' and a 'Show: 25' dropdown menu.

Below the 'Transfer Orders' section, there are two expandable sections: 'International Number Orders' and 'Pending Vanity Numbers'.

Auto-Receptionist

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

Note: The auto-receptionist defaults to IVR Mode: single level. You can change the IVR mode to multi-level for a more intricate IVR menu. Once the settings are changed to multi-level IVR mode, options are slightly different.

When you have enabled RingCentral Multi-Site Support, the user interface displays the auto-receptionist for each of the sites' auto-receptionist with individual business hours, custom rules, IVR settings, and regional settings.

The top screenshot displays the 'Auto-Receptionist > General Settings' page. The left sidebar menu has 'Auto-Receptionist' highlighted. The main content area includes a 'Create your own Auto-Receptionist' instruction with a 'Learn More' link and a 'Single Level' dropdown. The settings are organized into sections: Company Hours (24 hours), IVR Settings (Operator Ext.: Hank Hill, Ext. 101), Dial-by-Name Directory (On), Call Recording (On-demand: On, Automatic: Off), Block robocalls on toll-free numbers (Off), and Regional Settings (Time Zone: (GMT-08:00) Pacific Time (US & Canada)).

The bottom screenshot shows the 'Auto-Receptionist > General Settings' page for a multi-level configuration. The 'Multi-level' dropdown is selected. A 'Search sites...' input field is present. A table lists the sites:

Ext.	Name/Type
	Main Site
40000	site 2

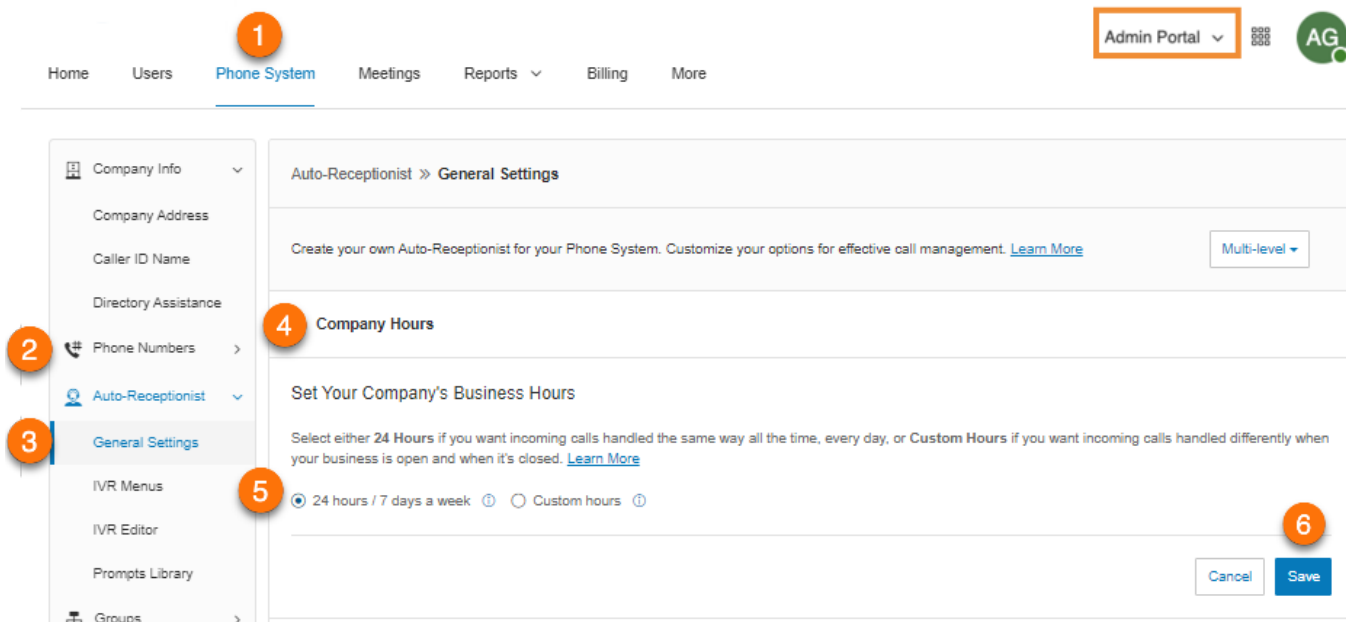
Below the table is a pagination control showing '< 1 >'. The right-hand settings sections (Company Hours, IVR Settings, Dial-by-Name Directory, Call Recording, Block robocalls on toll-free numbers, and Regional Settings) are identical to the top screenshot.

Company business hours

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

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

Note: If you have global companies, select first which level to which the site you're configuring should belong to by selecting from the Multi-level dropdown menu in the upper right.



Company call handling

Company Call Handling provides call handling options for single-level IVR accounts. This controls what callers hear when they dial your company number/s during business or after hours. You can configure separate settings for business hours and after hours.

There is also an option for accounts with a single-level IVR setting to forward all company calls when needed, such as during holidays, manual closures, or emergencies. Incoming calls can be forwarded to a company greeting, announcement, voicemail, coworker, call queue, or shared line. You can set the time period when the incoming calls should be forwarded.

1. From the **Admin Portal**, navigate to **Phone System > Auto-Receptionist > General Settings**.
2. Click **IVR Settings**. **Company Call Handling** appears.
3. Select **Forward all company calls** if you want this option, and specify
 - a. Where calls should be forwarded.
 - b. Start and end times for forwarding.
 - c. Review the company greeting and click **Save**.
4. Under **Business Hours** and **After Hours**, select one of the following:
 - **Company Greeting**: Sends the call to company greeting. Callers may hear options where they want to be connected to.
 - **User Extension**: Sends the call to a User extension.
 - **Call Queue Group**: Sends the call to a Call Queue Group.
 - **Shared Line**: Sends the call to a Shared Line.
 - **Voicemail**: Sends the call to a Message-only Extension.
 - **Announcement**: Sends the call to an Announcement-only Extension.
 - **Limited Extension**: Sends the call to a Limited Extension.

Company greeting

1. From the **Admin Portal**, navigate to **Phone System > Auto-Receptionist > General Settings**.
2. Click **IVR Settings**. **Company Call Handling** appears.
3. Under **Business Hours** and **After Hours**, select **Company Greeting**.
4. Click **Edit** under **Play company greeting**. The **Company Hours Greeting** window will appear.

RingCentral 1

Admin Portal AG

Home Users Phone System Meetings Reports Billing More

Company Info

Company Address

Caller ID Name

Directory Assistance

Phone Numbers

Auto-Receptionist

General Settings

IVR Menus

IVR Editor

Prompts Library

Groups

Phones & Devices

Emergency Calling

Auto-Receptionist >> General Settings

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

Company Hours

Custom

IVR Settings

Company Call Handling

Control what callers hear when they dial your company number during business or after hours. [Learn More](#)

Business Hours After Hours

Incoming calls will be routed to

Company Greeting

User Extension

Call Queue Group

Shared Line

Voicemail

Announcement

Limited Extension

Play company greeting

00:00 / 00:00

If caller enters no action: Connect to operator

Edit

5. For **Set Greeting**, select:

- **Default:** Plays system default greeting.
- **Custom:** Plays your custom recording. Select one of the following to record your greeting:
 - **Phone:** Choose a phone number from the dropdown menu if you have saved numbers or select *Enter a new number* and type the phone number in the **Call me at** field. Click the **Call Now** button and RingCentral will call you to record your greeting.
 - **Computer Microphone:** Click **Allow** if RingCentral asks to use your microphone. The **Microphone Test and Record** settings will appear. When ready, click the red record button to record your greeting through your computer microphone. Stop the recording and listen to the playback. Click the arrow up to upload your recording.
 - **Importing:** Browse for a WAV or MP3 file you want to use. Click **Open**.

6. Under **If Caller Enters no Action**, select *Connect to operator* or *Disconnect*.

7. Click **Done**.

8. Click **Save**.

Company Hours Greeting

Set Greeting

Default

Default

Custom

English (U.S.)

"Thank you for calling John Smith Company. If you know your party's extension you may dial it at any time. For the Operator press 0 or stay on the line. For the Dial-By-Name directory press 9."

00:00 / 00:00

If Caller Enters no Action

Connect to operator

Disconnect

Company Call Flow

Play Company Greeting

Caller dial 0 Route to Extension EA Phone, Ext. 11055

Caller dial 9 Route to Company Directory

Caller dial extension Route to Extension

No action Connect to Operator John Smith, Ext. 11053

Cancel

Done

Business Hours

After Hours

Incoming calls will be routed to

Company Greeting

User Extension

Call Queue Group

Shared Line

Voicemail

Announcement

Limited Extension

Play company greeting

00:00 / 00:00

If caller enters no action: Connect to operator

Edit

Custom Answering Rules

You can create custom rules for special routing during holidays, specific time of the day (e.g. lunch break) or for special callers. [Learn More](#)

Add Custom Rule

General IVR Settings

Operator Extension (0)

John Smith, Ext. 11053

Select Extension

Zero Dialing

When listening to User or Group Extension greeting, press 0 will do as per the selected option below.

Connect to Company Greeting

Do nothing

Connect to Extension

Cancel

Save

Regional Settings

Set your timezone in **Regional Settings**. Typically, your timezone is linked to the area code of your main company number. For example, for area code 650 (California), the time zone defaults to Pacific Time. If you are not physically located in your area code, you may want to change your timezone. You can also set the following Regional Settings:

- Time Zone
- Time Format
- Home Country Code
- User Language
- Greetings Language
- Regional Format

To configure regional settings:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **General Settings**.
4. Click **Regional Settings**.
5. Under **Regional Settings**, select options:
 - Select your **Time Zone**.
 - Select **Time Format** as 12hr or 24hr.
 - Select your **Home Country Code**.
 - Select your **User Language** as the default language used for all accounts and notifications.
 - Select the **Greetings Language** as the default language you want to use for phone greetings.
 - Select **Regional Format** as the format used to show date, time, currency, and other numbers.
6. Click **Save**.

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info >

Phone Numbers >

Auto-Receptionist >

General Settings

IVR Menus

IVR Editor

Prompts Library

Groups >

Phones & Devices >

Emergency Calling >

Auto-Receptionist » **General Settings**

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

Company Hours

24 hours

IVR Settings

Operator Ext.: Hank Hill, Ext. 101

Dial-by-Name Directory

On

Call Recording

On-demand: On

Automatic: Off

Block robocalls on toll-free numbers

Off

Regional Settings

This is where administrators can set the account's time zone and time format. [Learn More](#)

Time Zone

(GMT-08:00) Pacific Time (US & Canada)

Time Format

☒ 12 h (AM/PM) ☐ 24 h

Home Country Code

United States (1)

User Language

English (U.S.)

Greetings Language

English (U.S.)

Regional Format

United States

Cancel Save

Dial-by-name directory

The Dial-by-Name section allows you to enable callers to search your phone system by users' first or last names using their dial pad keys. To Configure the Dial-By-Name Directory:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **General Settings**.
4. Click **Dial-by-Name Directory**.
5. Under **Dial-by-Name Directory**, set the slider button to **On**. Select options for dialing by name:
 - By default, all extensions are included in the directory.
 - To limit included extensions, under **Extensions in Directory**, click **Edit**. Then select the extensions you want to include in the Dial-by-Name Directory.
6. Click **Done**.

The screenshot shows the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with a blue underline and a red circle with '1'), 'Meetings', 'Reports', 'Billing', and 'More'. On the right, there's an 'Admin Portal' dropdown and a user profile icon labeled 'AG'.

The left sidebar contains a menu with items: 'Company Info', 'Phone Numbers', 'Auto-Receptionist' (highlighted with a red circle with '2'), 'General Settings' (highlighted with a red circle with '3'), 'IVR Menus', 'IVR Editor', 'Prompts Library', 'Groups', 'Phones & Devices' (highlighted with a red circle with '4'), and 'Emergency Calling' (highlighted with a red circle with '5').

The main content area is titled 'Auto-Receptionist > General Settings'. It includes a 'Single Level' dropdown menu. Below this, there are sections for 'Company Hours' (set to '24 hours') and 'IVR Settings' (Operator Ext.: 'Hank Hill, Ext. 101').

The 'Dial-by-Name Directory' section is expanded, showing a toggle switch labeled 'Enable Dial-by-Name Directory' which is turned 'On' (highlighted with a red circle with '5'). Below the toggle, there's a table titled 'Extensions in Directory' with columns 'Searchable Extensions' and 'Directory Extension'. The first row shows '1' in the 'Searchable Extensions' column and '9' in the 'Directory Extension' column. An 'Edit' button is located below the first row.

At the bottom, there's a 'Search Criteria' section with a 'Search by' dropdown menu. Two radio buttons are present: 'First name' and 'Last name' (selected, highlighted with a red circle with '6'). At the bottom right, there are 'Cancel' and 'Save' buttons.

Operator extension

Select the extension to use for the operator, which receives all calls and messages by default. The operator extension is 101 by default.

Note: Use caution when changing this setting, as the operator is the default call recipient when no other extension is dialed.

To reset the Operator Extension:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **General Settings**.
4. Click **IVR Settings**.
5. Under **General IVR Settings**, click **Select Extension**. The **Operator Extension** window appears.
6. Select the extension for the operator.
7. Click **Done**.
8. Click **Save**.

The assigned Operator Extension will now appear under **IVR Settings** heading.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with a red circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. The sidebar on the left contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist' (highlighted with a red circle 2), 'General Settings' (highlighted with a red circle 3), 'IVR Menus', 'IVR Editor', 'Prompts Library', 'Groups', 'Phones & Devices', and 'Emergency Calling'. The main content area shows 'Auto-Receptionist > General Settings'. Under 'Company Hours', it indicates '24 hours'. Under 'IVR Settings', there are sections for 'Company Greeting', 'Company Hours Greeting', and 'After Hours Greeting'. A 'Custom Answering Rules' section is also visible. A modal window titled 'Operator Extension (0)' is open, showing a table with columns 'Select', 'Name', 'Ext.', 'Type', and 'Department'. The table lists 'Hank Hill' with extension '101' and type 'User' (highlighted with a red circle 6). The modal includes a 'Select Extension' button (highlighted with a red circle 5) and 'Cancel' and 'Done' buttons (highlighted with a red circle 7). At the bottom of the main content area, there are 'Cancel' and 'Save' buttons (highlighted with a red circle 8).

Zero dialing

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

To set zero dialing:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **General Settings**.
4. Click **IVR Settings**.
5. Scroll down and click **Zero Dialing**.
6. Select one of three options:
 - **Connect to Company Greeting.**
 - **Do Nothing:** the system ignores any '0' dialed by the caller and continues uninterrupted. This applies regardless of the number of times the caller dials '0'.
 - **Connect to Extension:** choose from **Operator** or **Specific Extension**.
7. For multi-site accounts, you may configure different or multiple operators on a per-location basis.
8. Click **Save**.

Note: When deleting an extension, a warning shows that if the extension is selected for zero dialing connection, deleting the extension will result in zero dialings by callers to be connected to Company Greeting.

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info >
Phone Numbers >
Auto-Receptionist >
General Settings
IVR Menus
IVR Editor
Prompts Library
Groups >
Phones & Devices >
Emergency Calling >

Auto-Receptionist > General Settings

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

Company Hours
24 hours

IVR Settings

Company Greeting
How to handle incoming calls during business hours. [Learn More](#)

Company Hours Greeting
Play company greeting
00:00 / 00:00
If caller enters no action: Disconnect
[Edit](#)

After Hours Greeting
After Hours call handling go into effect when your business is closed. The Business Hours is currently set to 24 hours a day. To change business hours, go to Auto-Receptionist > Company Hours.

Custom Answering Rules
You can create custom rules for special routing during holidays, specific time of the day (e.g. lunch break) or for special callers. [Learn More](#)
[Custom Rule](#)

General IVR Settings
Operator Extension (0) [?](#)
Hank Hill, Ext. 101
[Select Extension](#)

Zero Dialing [?](#)
When listening to User or Group Extension greeting, press 0 will do as per the selected option below.

☐ Connect to Company Greeting
☐ Do nothing
☒ Connect to Extension
 ☒ Operator
 ☐ Specific Extension

[Cancel](#) [Save](#)

Name or label definitions

You can label phone numbers in a meaningful way to help identify locations or users in your system*. Larger businesses with multiple locations and advanced call handling rules might involve selecting from lists of numbers. Many numbers may appear similar unless they are renamed. An admin can assign an alternative name to a particular number using the following steps:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **Company**.
4. Click the phone number to which you want to apply a label.
5. Enter the label text in the **Name** field. You can designate the kind of number by using **Number Type**.
6. Click **Save**.

Note: This option is available for RingCentral Ultimate users.

The screenshot illustrates the process of renaming a phone number in the RingCentral Admin Portal. It is divided into two parts: a top section showing the navigation path and a bottom section showing the edit form.

Top Section: Navigation and Number List

- Step 1:** The **Phone System** tab is selected in the top navigation bar.
- Step 2:** The **Phone Numbers** option is selected in the left sidebar.
- Step 3:** The **Company** option is selected under the Phone Numbers section.
- Table:** A table lists phone numbers. The number **(720) 555-5555** is highlighted with a blue selection bar.
- Step 4:** The selected number is clicked to open its edit form.

Bottom Section: Edit Form for (720) 555-5555

- Step 5:** The **Name** field is focused, and a label is being entered.
- Number Type:** A dropdown menu is set to **Voice and Fax**.
- Call Routing:** Under "Calls to this number will be connected to:", the **RingCentral Audio Conferencing** option is selected.
- Step 6:** The **Save** button is clicked to apply the changes.

On-demand call recording

On-demand Call Recording makes it easy for RingCentral users to record calls they make or receive. When you enable **On-demand Call Recording**, users can activate it by pressing *9 on their phone's dial pad.

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

Choosing an on-demand call recording announcement

This explains how to select a particular recording announcement once On-demand call recording is enabled.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Select **Auto-Receptionist**.
3. Click **General Settings**.
4. Click **Call Recording**. Slide the button on for **On-demand Call Recording**.
5. Click **Edit** to change:
 - a. **Announcement on Start**
 - Click **Set Greeting** and choose **Default** or **Custom**.
 - Click **View In**, choose the language for viewing the message text.
 - b. **Announcement on Stop**
 - Click **Set Greeting** and choose **Default** or **Custom**.
 - Click **View in**, choose the language for viewing the message text.
6. Click **Done**.
7. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface for configuring the Auto-Receptionist. The top navigation bar includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The left sidebar contains a list of settings categories: Company Info, Phone Numbers, Auto-Receptionist (highlighted with a red circle 2), General Settings (highlighted with a red circle 3), IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling. The main content area is titled "Auto-Receptionist > General Settings". It includes a "Single Level" dropdown menu and a "Learn More" link. The settings are organized into sections: "Company Hours" (set to 24 hours), "IVR Settings" (Operator Ext.: Hank Hill, Ext. 101), and "Dial-by-Name Directory" (set to On). The "Call Recording" section is highlighted with a red circle 4 and contains the following options: "On-demand Call Recording" (enabled), "Enable On-demand Call Recording" (checkbox), and "Announcement on Start" and "Announcement on Stop" (both with play buttons and duration sliders). Two modal windows are open for editing announcements. The "Announcement on Start" modal (highlighted with a red circle 5) shows "Set Greeting" (Default), "View In" (English (U.S.)), and a duration slider. The "Announcement on Stop" modal (highlighted with a red circle 5) shows "Set Greeting" (Default), "View In" (English (U.S.)), and a duration slider. Both modals have "Cancel" and "Done" buttons. A "Save" button is located at the bottom right of the main content area (highlighted with a red circle 7).

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info >

Phone Numbers >

Auto-Receptionist >

General Settings

IVR Menus

IVR Editor

Prompts Library

Groups >

Phones & Devices >

Emergency Calling >

Auto-Receptionist > **General Settings**

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

Company Hours

24 hours

IVR Settings

Operator Ext.: Hank Hill, Ext. 101

Dial-by-Name Directory

On

Call Recording

On-demand Call Recording

☒ Enable On-demand Call Recording

Enable your users to record calls at any time by pressing (*) (9) on a phone dial pad. [Learn More](#)

Announcement on Start

Announcement on Stop

Announcement on Start

Set Greeting: Default

View In: English (U.S.)

"This call is being recorded. If you do not wish to be recorded, please disconnect at this time."

Announcement on Stop

Set Greeting: Default

View In: English (U.S.)

"This call has been recorded."

Cancel Done

Cancel Save

Enabling on-demand call recording announcement

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **General Settings**.
4. Click **Call Recording**.
5. Move the slider button to the right next to, **Enable On-demand Call Recording**.
6. Click **Save**.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The left sidebar contains a menu with items like Company Info, Phone Numbers, Auto-Receptionist (highlighted with a red circle 2), General Settings (highlighted with a red circle 3), IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling. The main content area is titled 'Auto-Receptionist » General Settings'. It includes a 'Single Level' dropdown and a 'Learn More' link. Below this are sections for 'Company Hours' (24 hours), 'IVR Settings' (Operator Ext.: Hank Hill, Ext. 101), and 'Dial-by-Name Directory' (On). The 'Call Recording' section (highlighted with a red circle 4) contains 'On-demand Call Recording' with a toggle switch (highlighted with a red circle 5) set to 'Enable On-demand Call Recording'. Below the toggle are two audio player controls for 'Announcement on Start' and 'Announcement on Stop', each with an 'Edit' button. The 'Automatic Call Recording' section has a toggle switch set to 'Disable Automatic Call Recording'. At the bottom right, there are 'Cancel' and 'Save' buttons (the 'Save' button is highlighted with a red circle 6).

Interactive Voice Response (IVR)

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

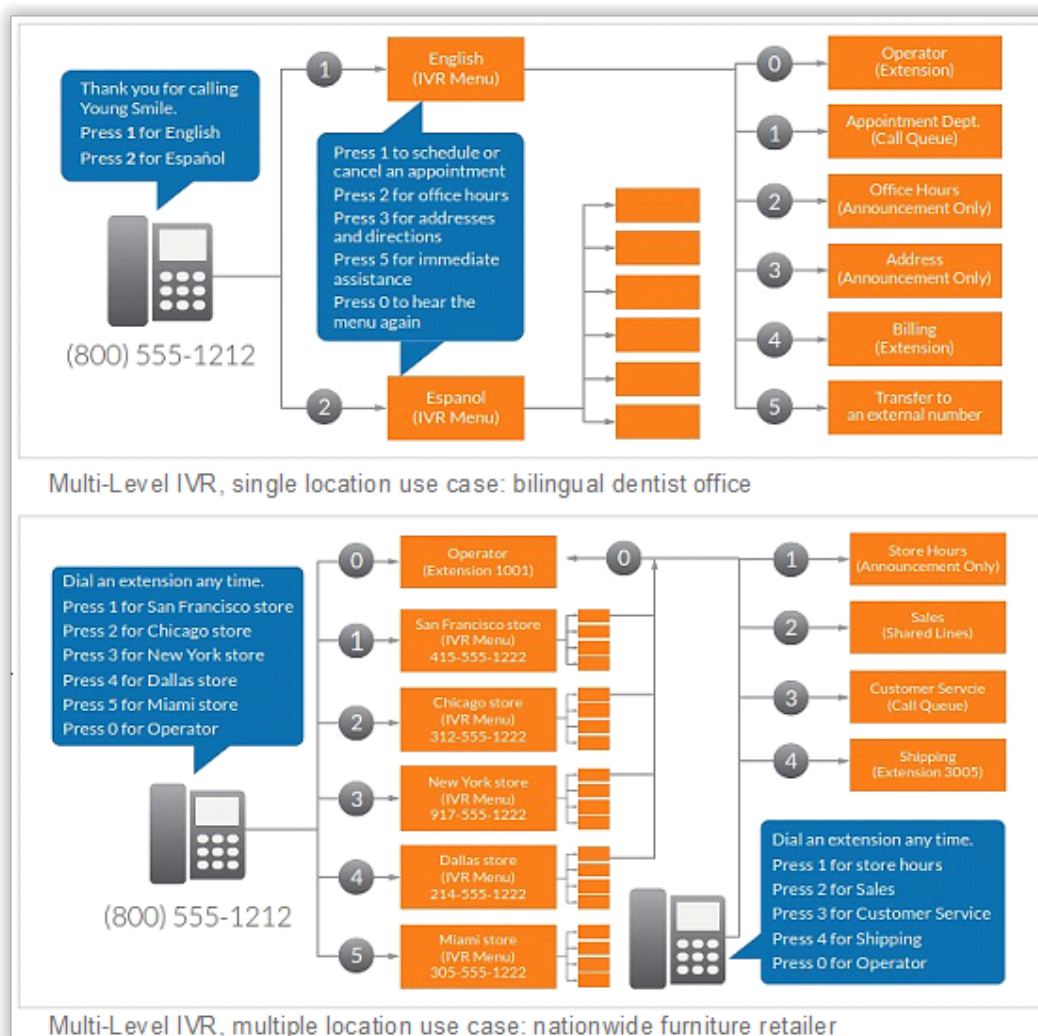
Multi-level IVR options

Single-location IVR example

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

Multiple-location IVR example

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



Switching to multi-level IVR mode

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

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

Because your call handling settings are discarded, you will need to reset them. Your IT department should validate and test the IVR configuration to ensure the routing and prompts in a root menu work well before connecting them to the Auto-Receptionist.

The screenshot illustrates the process of switching to multi-level IVR mode in the RingCentral Admin Portal. The interface is divided into a top navigation bar, a left sidebar, and a main content area.

- Top Navigation Bar:** Includes 'Home', 'Users', 'Phone System' (1), 'Meetings', 'Reports', 'Billing', and 'More'. The 'Admin Portal' dropdown and 'AG' logo are on the right.
- Left Sidebar:** Contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist' (2), 'General Settings' (3), 'IVR Menus', 'IVR Editor', 'Prompts Library', 'Groups', 'Phones & Devices', and 'Emergency Calling'.
- Main Content Area:** Displays 'Auto-Receptionist >> General Settings'. It includes a description, a 'Learn More' link, and sections for 'Company Hours', 'IVR Settings', 'Dial-by-Name Directory', and 'Call Recording'. A 'Single Level' dropdown (4) is visible, with 'Multi-level' selected.
- Switch to Multi-level IVR Modal:** A warning message (5) states: 'Warning: By switching to Multi-level IVR mode, all of your existing company call handling settings will be discarded. Please confirm that you wish to proceed.' It includes 'Cancel' and 'Continue' buttons.
- Switch to Multi-level IVR Table:** A table (6) with columns 'Select', 'Name', and 'Ext.'. It lists 'IVR Menu 1001' with extension '1001'. A search bar is at the top of the table.
- Bottom:** A 'Total: 1' summary, a 'Show: 25' dropdown, and a 'Save' button (7).

Managing general IVR settings

When you have set multi-level IVR mode, you can see **General IVR Settings** from the Auto-Receptionist menu. To set general IVR settings:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **General Settings**.
4. Select **IVR Settings**.
5. Scroll down to **General IVR Settings**.
6. Under **General IVR Settings**, select options:
 - a. Configure the actions for the general navigation keys. When callers press # (hash/ pound) or * (star/asterisk), the following actions are available:
 - **Repeat menu greeting.**
 - **Return to root menu.**
 - **Return to previous menu.**
 - b. If the caller enters no action after the prompt is played three times, the following actions are available:
 - **Disconnect:** The call will be disconnected.
 - **Connect to extension:** The caller is routed to the extension you specify.
7. Click **Save**.

HomeUsersPhone System1MeetingsReportsBillingMore

Admin PortalAG

23

4

5

6

7

Company Info >Phone Numbers >Auto-Receptionist >General SettingsIVR MenusIVR EditorPrompts LibraryGroups >Phones & Devices >Emergency Calling >

Auto-Receptionist > General Settings

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

Company Hours24 hours

IVR Settings

Top Level IVR Menu

Incoming calls to company number will be connected to the following top menus.

Company Hours Top Menu

IVR Menu 1001, Ext. 1001

No prompt defined for the selected IVR Menu.

Select IVR Menu

After Hours Top Menu

After Hours call handling go into effect when your business is closed. The Business Hours is currently set to 24 hours a day. To change business hours, go to Auto-Receptionist > Company Hours.

Custom Answering Rules

You can create custom rules for special routing during holidays, specific time of the day (e.g. lunch break) or for special callers. [Learn More](#)

Custom Rule

General IVR Settings

Specify general navigation keys. All the menus will follow these settings unless you overwrite them on an individual menu level.

Press #

Repeat menu greeting

Press *

Return to previous menu

If caller enters no action after the prompt played 3 times

☒ Disconnect the call☐ Connect to extension

Zero Dialing ⓘ

When listening to User or Group Extension greeting, press 0 will do as per the selected option below.

☒ Connect to Top Level Menu☐ Do nothing☐ Connect to Extension

Company Fax/SMS Recipient

Select the extension below to receive all faxes and Business SMS when connecting incoming calls to company numbers to IVR menu with Multi-level IVR enabled.

Hank Hill, Ext. 101

Select Extension

CancelSave

IVR Editor

RingCentral provides additional IVR tools to help you create and manage your IVR Menus.

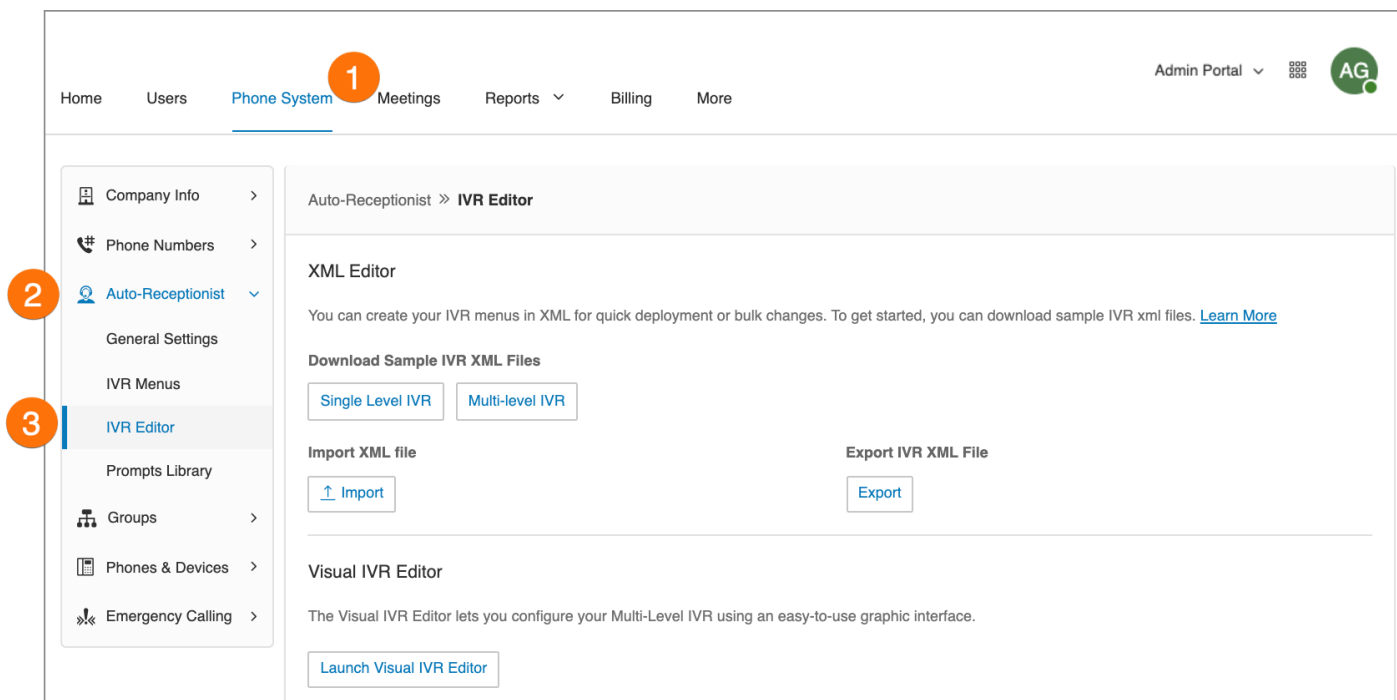
Auto-Receptionist consists of three parts that help you configure your IVR: IVR Menus, IVR Editor, Prompts Library. Use the IVR tool to:

- Configure IVR menus with the Visual IVR Editor
- Import prompt recordings
- Record prompts
- Import and export XML files

Note: Any change on the IVR menu overwrites the imported XML file. It is suggested that you export and save a new XML file after making changes.

Access the IVR Tool by using the following steps:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**.



IVR menus

RingCentral offers various tools to help manage and create IVR (interactive voice response) menus. Administrators can add new IVR menus as shown in the following instructions, use the Visual IVR Editor, or import an XML file.

Adding an IVR menu group

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus**.
4. Click the **New IVR Menu** button. The **Add IVR Menu** window will appear.
5. Enter the **Extension Number** and **Extension Name**.
6. Click **Save**.

The new IVR Menu appears listed under IVR Menus.

Note: Available for MVP Premium and Ultimate users only.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with an orange circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. On the right, there are links for 'Admin Portal' and a user profile icon labeled 'AG'. A left-hand sidebar contains a list of menu items: 'Company Info', 'Phone Numbers', 'Auto-Receptionist' (highlighted with an orange circle 2), 'General Settings', 'IVR Menus' (highlighted with an orange circle 3), 'IVR Editor', 'Prompts Library', 'Groups', 'Phones & Devices', and 'Emergency Calling'. The main content area is titled 'Auto-Receptionist >> IVR Menus'. It features a search bar, a 'Language' dropdown menu, and buttons for 'Validate Menus' and '+ New IVR Menu' (highlighted with an orange circle 4). Below this, a message states: 'Before you can switch your company call handling to Multi-Level IVR, you must first add and set up your IVR Menu. [Learn More](#)'. A table lists existing IVR menus with columns for 'Name', 'Numbers', 'Ext.', 'Language', and 'Actions'. One entry is shown: 'IVR Menu 1001' with extension '1001' and language 'English (U.S.)'. An 'Add IVR Menu' modal window is open in the foreground, containing fields for 'Extension Number' (with '1002' entered, highlighted with an orange circle 5) and 'Extension Name' (with 'IVR Menu 1002' entered). At the bottom of the modal are 'Cancel' and 'Save' buttons (the 'Save' button is highlighted with an orange circle 6).

Configuring an IVR menu

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

Configuring extension info

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

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus**.
4. Select an existing **IVR Menu**.
5. Enter the **Extension Number**, **Extension Name**, and set the **Language**.
 - Click **Add** if you would like to add a **Direct Number**.
 - If you would like to delete this IVR menu, click **Delete IVR Menu**.
6. Click **Save**.

The screenshot illustrates the process of configuring an IVR menu in the RingCentral Admin Portal. The interface is divided into a top navigation bar, a left sidebar, and a main content area.

Top Navigation Bar: Includes links for Home, Users, **Phone System** (step 1), Meetings, Reports, Billing, and More. The Admin Portal logo is in the top right.

Left Sidebar: Contains links for Company Info, Phone Numbers, **Auto-Receptionist** (step 2), and **IVR Menus** (step 3). Under Auto-Receptionist, there are links for General Settings, IVR Editor, and Prompts Library. Under IVR Menus, there are links for Groups, Phones & Devices, and Emergency Calling.

Main Content Area: Displays the 'Auto-Receptionist » IVR Menus' page. It includes a search bar, a language dropdown, and buttons for 'Validate Menus' and '+ New IVR Menu'. A message states: 'Before you can switch your company call handling to Multi-Level IVR, you must first add and set up your IVR Menu. [Learn More](#)'. Below this is a table of IVR menus:

Name	Numbers	Ext.	Language	Actions
IVR Menu 1001		1001	English (U.S.)	
IVR Menu 1002		1002	English (U.S.)	

Below the table, the configuration page for 'IVR Menu 1002 (Ext. 1002)' is shown. It includes a 'Back' link and a sidebar with 'Extension Info' selected (step 5). The main form contains the following fields:

- Extension Number:** 1002
- Menu Name:** IVR Menu 1002
- Language:** English (U.S.)
- Direct Number:** Add

At the bottom of the form, there is a 'Delete IVR Menu' button (step 6) and a 'Save' button.

Adding Key Presses

Before you can switch your company call handling to multi-level IVR, you must first add and set-up your IVR menu. The Auto-Receptionist greets callers with a recorded message when they call your company. Your Auto-Receptionist is initially set to play a default greeting with your company name using text-to-speech technology. You can set a custom greeting by recording through your phone or computer or by uploading a sound file. You can also connect the Auto-Receptionist calls directly to an extension of your choice.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus**. To add a new IVR Menu, click **New IVR Menu**, fill in the fields for **Extension Number** and **Extension Name**, and then click **Save**.
4. Click **Key Presses**.
5. Click **Add Key**. The **Key Press Assignment** window appears.
6. Set the **Key Press**.
7. Select a **Connect to** action:
 - a. *Transfer to voicemail of*
 - b. *Connect to Dial-by-name directory*
 - c. *External transfer*
8. Select to whom the setting will apply:
 - a. All extensions
 - b. Users
 - c. IVR menu
 - d. Others
 - e. Groups
9. Select **Users**.
10. Click **Save**.

The screenshot illustrates the process of configuring an IVR Menu in the RingCentral Admin Portal. The interface is divided into a top navigation bar, a left sidebar, and a main content area.

Top Navigation Bar: Includes links for Home, Users, Phone System (1), Meetings, Reports, Billing, and More. The Admin Portal dropdown and AG logo are on the right.

Left Sidebar: Contains a tree view with options: Company Info, Phone Numbers (2), Auto-Receptionist (3), General Settings, IVR Menu (4), IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling.

Main Content Area:

- Auto-Receptionist > IVR Menu:** The top section of the main content area.
- Search and Language:** A search bar and a Language dropdown menu.
- Buttons:** Validate Menu and + New IVR Menu.
- Message:** "Before you can switch your company call handling to Multi-Level IVR, you must first add and set up your IVR Menu. [Learn More](#)"
- Table:** A table with columns: Name, Numbers, Ext., Language, and Actions. It lists "IVR Menu 1001" with extension 1001 and language English (U.S.).

IVR Menu 1001 (Ext. 1001) Detail View:

- Extension Info:** A sidebar on the left with tabs for Prompt and Key Presses (4).
- Key Presses:** The main section on the right, showing "No key is configured." and an Add Key button (5).
- Generic Key Presses:** Options to Use default settings (selected) or Specify, with a View Defaults button.

Key Press Assignment Modal:

- Header:** Key Press Assignment (X).
- Form:** Fields for Key Press (6), Action (7), and Extensions: All exten... (8).
- Table:** A table with columns: Select, Name, Ext., Type, and Department. It lists "Hank Hill" with extension 101 and type User.
- Footer:** Total: 1, Show 10, and buttons for Cancel and Save (10).

Adding a direct number

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus**.
4. Click an existing **IVR Menu**.
5. Click **Add** under **Direct Number**.
6. Select a **Location** and follow these instructions for the **Number Type** you choose:
 - a. **Local Number**: Provide the State and Area Code. Select one or more numbers.
 - b. **Toll-Free Number**: Select Toll-Free Number and select a Toll-Free prefix. Select one or more numbers.
 - c. **Vanity Number**: Select Vanity. Enter a number that helps customers remember your business phone number. Click Search to check availability. Select a number.
7. Click **Add Numbers**.
8. Click **Next** when finished choosing your number.

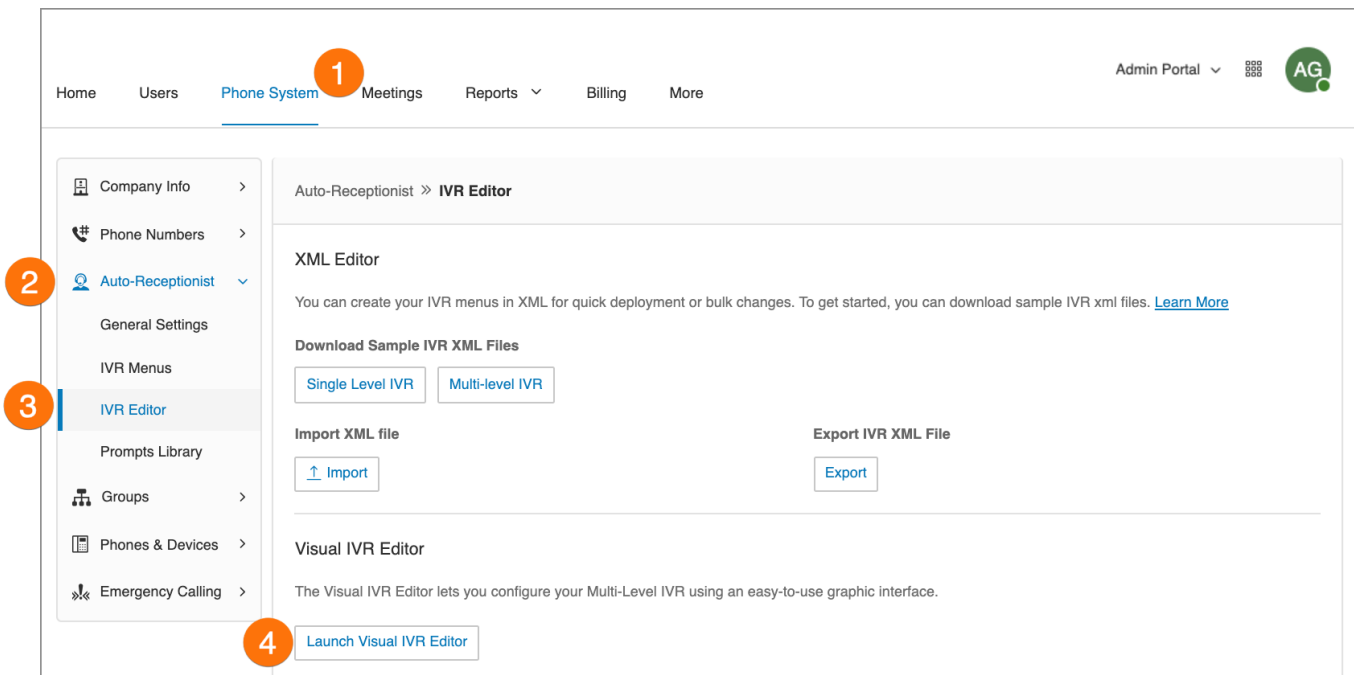
The screenshot illustrates the process of adding a direct number to an IVR menu in the RingCentral Admin Portal. It is divided into three main sections corresponding to the steps in the instructions:

- Step 1-4: Admin Portal Navigation**
 - The top navigation bar shows 'Phone System' selected (Step 1).
 - The left sidebar shows 'Auto-Receptionist' (Step 2) and 'IVR Menus' (Step 3).
 - The main content area shows the 'IVR Menus' list with two entries: 'IVR Menu 1001' and 'IVR Menu 1002' (Step 4).
- Step 5: IVR Menu Configuration**
 - The 'IVR Menu 1002 (Ext. 1002)' configuration page is shown.
 - Fields include 'Extension Number' (1002), 'Menu Name' (IVR Menu 1002), and 'Language' (English (U.S.)).
 - The 'Direct Number' section has an 'Add' button (Step 5).
- Step 6-8: Add Direct Number Modal**
 - The 'Add Direct Number' modal is open, showing a progress bar with '1 Select Numbers' (Step 6), '2 Confirm Order', and '3 Order Confirmation'.
 - The 'Select Numbers' section (Step 6) includes:
 - 'Location' dropdown: Domestic - US/Canada
 - 'Number Type' dropdown: Local Number
 - 'State' dropdown: State
 - 'Area Code' dropdown: Area Code
 - An 'Add Numbers' button is at the bottom left (Step 7).
 - 'Cancel' and 'Next' buttons are at the bottom right (Step 8).

Visual IVR Editor

The Visual IVR Editor lets you configure your Multi-level IVR using an easy-to-use graphical interface. Add menus and assign to extensions with just a few clicks. To launch the visual editor, follow these steps:

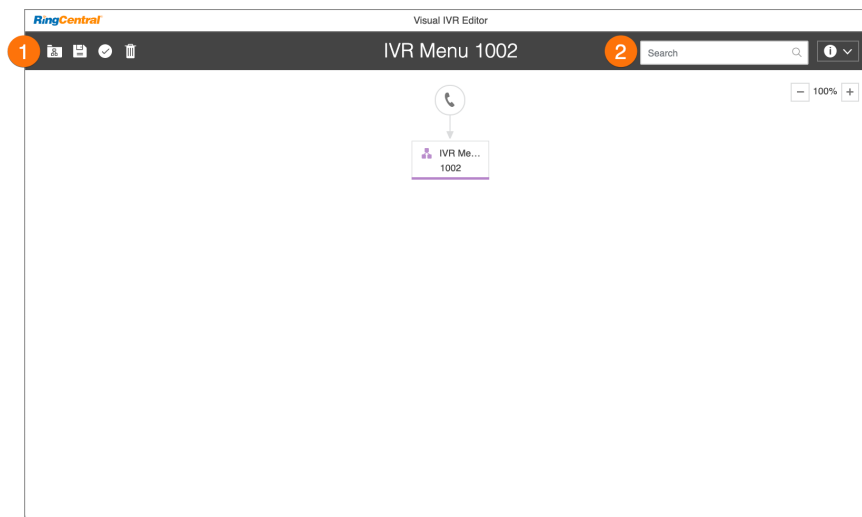
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**.
4. Click **Launch Visual IVR Editor**. The Visual IVR Editor opens in a new browser tab.



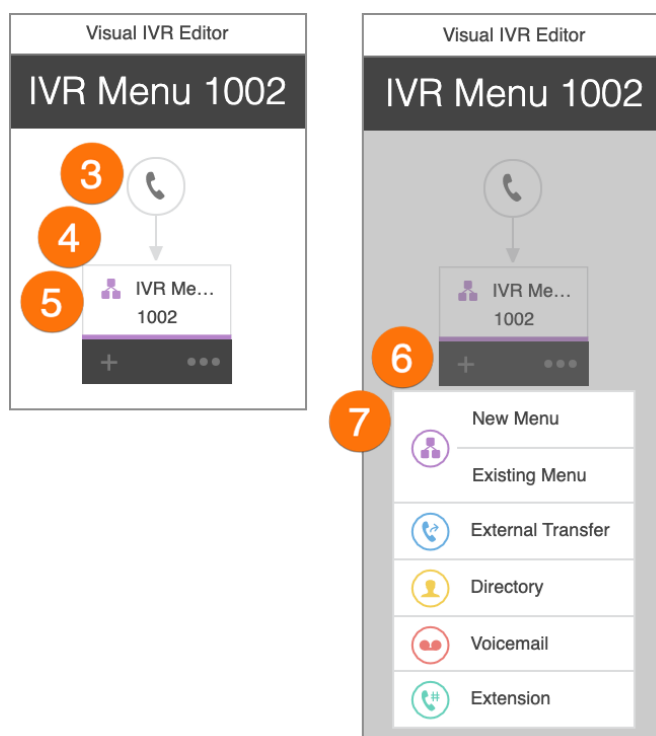
Creating a new IVR menu or open an existing IVR menu

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

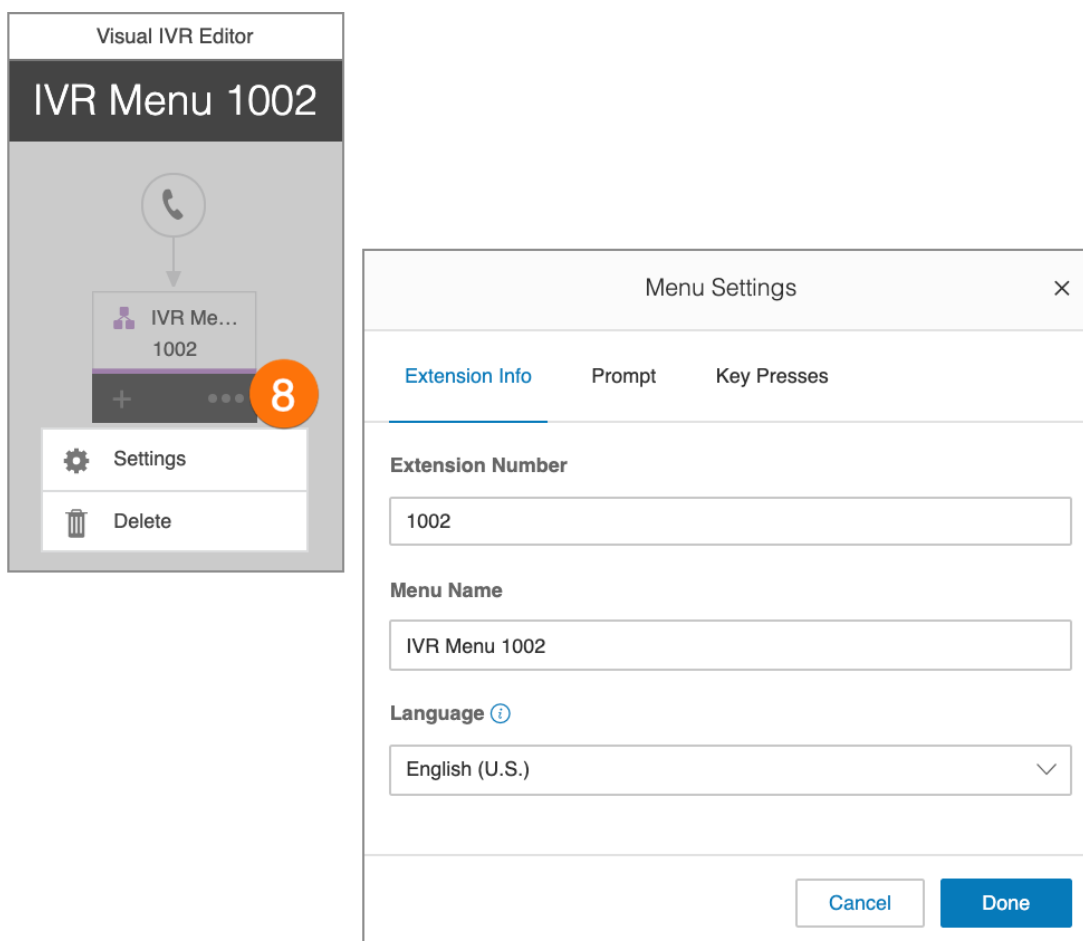
1. In the new tab, you will see your **Visual IVR Editor**. On this page, you will have a **New Tree** waiting to be created. You have the option to create a new IVR from this screen, or open an existing IVR and edit it in the Visual IVR Editor.
 - a. In the upper-left corner of the screen you have icons for **Open Existing Menu**, **Save**, **Validate**, and **Clear Workspace**.
2. In the upper-right corner, you have a search bar, an information dropdown menu with options for **Take a Tour** and **Learn More**, and when you are viewing an IVR menu, you will see zoom in and out buttons.



3. Click the **Phone** icon to start a new tree.
4. Your new tree will be automatically assigned a name and extension number.
5. Click the name or extension number to edit the text field and enter your preferred name and extension. Press enter when you are finished and the title will change automatically.
6. Hover over your new IVR menu to see more options.
7. Click “+” to add sub-items to your tree. Sub-items include:
 - a. **New Menu:** Create a new IVR menu as an option within your tree.
 - b. **Existing Menu:** Choose an existing IVR menu from a different IVR tree.
 - c. **External Transfer:** Include an external number in your tree.
 - d. **Directory:** Attach your company’s dial-by-name directory to your tree.
 - e. **Voicemail:** Give the option to leave a voicemail.
 - f. **Extension:** Add a specific extension to your tree.



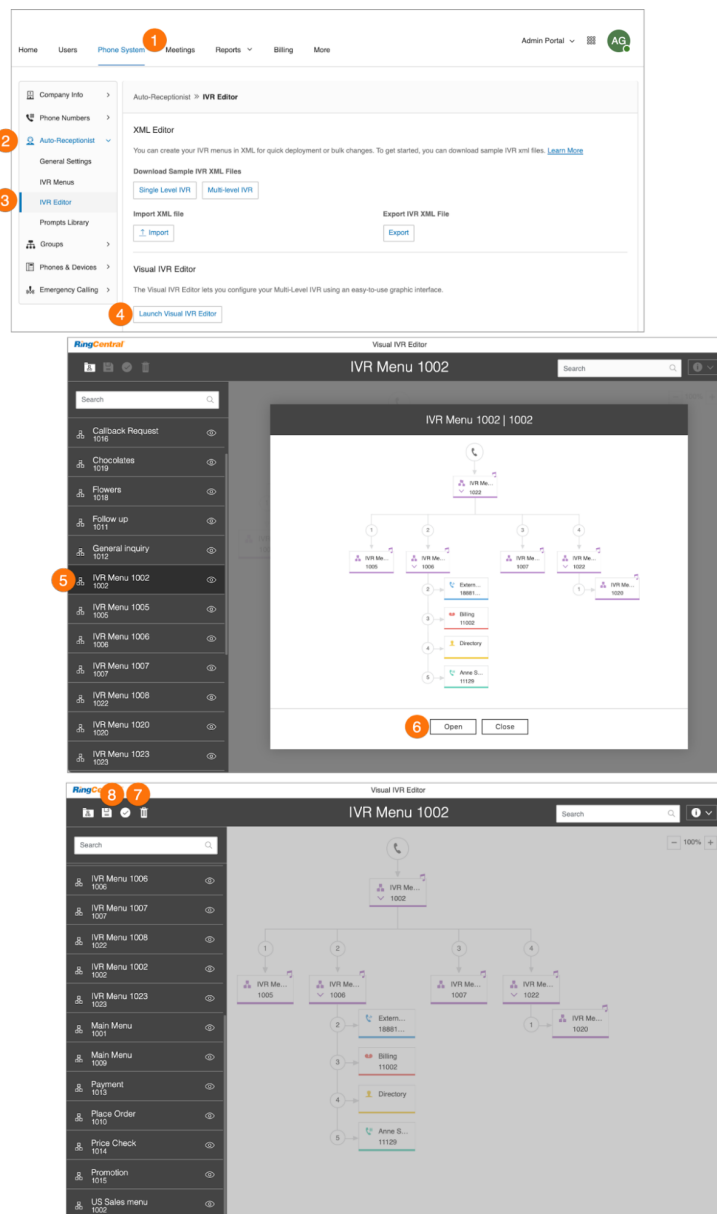
8. As you add sub-items to your tree, they will appear in the Visual IVR Editor. Once you have added your items to your menu, hover over an item to edit it and see more options. For some items you will see a "+" and "..." and other items will only have the trash can icon.
9. Click the IVR name and extension text fields to edit them.
10. Click "+" to add sub-items to your tree.
11. Click "..." to open the menu for **Settings**, **Duplicate**, and **Delete**.
12. Click **Settings** to edit your IVR Menu settings just as you would edit them in the IVR Group settings.
13. Click **Delete** to delete this item.
14. To save the configuration, click **Save** at the top left corner.



The image displays the Visual IVR Editor interface. On the left, a vertical panel titled "Visual IVR Editor" shows a menu tree for "IVR Menu 1002". A phone icon is at the top, followed by a box labeled "IVR Me... 1002". Below this box are three icons: a plus sign, three dots, and a trash can. An orange circle with the number "8" is positioned over the three dots icon. Below the menu tree are two buttons: "Settings" (with a gear icon) and "Delete" (with a trash can icon). On the right, a "Menu Settings" modal is open. It has a close button (X) in the top right corner. The modal contains three tabs: "Extension Info" (selected), "Prompt", and "Key Presses". Under the "Extension Info" tab, there are three fields: "Extension Number" (containing "1002"), "Menu Name" (containing "IVR Menu 1002"), and "Language" (a dropdown menu showing "English (U.S.)" with an information icon to its left). At the bottom right of the modal are two buttons: "Cancel" and "Done".

Editing an existing IVR menu with the visual IVR editor

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**.
4. Launch the Visual Editor, then click the **Open Existing Menu** icon.
5. Click on an existing menu to see a preview of the menu.
6. Click **Open** to be able to edit the menu in the Visual IVR Editor.
7. After editing your menu, click the **Validate** icon.
8. to check your IVR menu.
9. Click the **Save icon** once you are done editing to save your IVR.



Prompt recordings

Prompt recordings guide callers with instructions on keys to press. Prompts can be pre-uploaded and saved to the Prompts Library, which you can then set up as prompts using the IVR Tool.

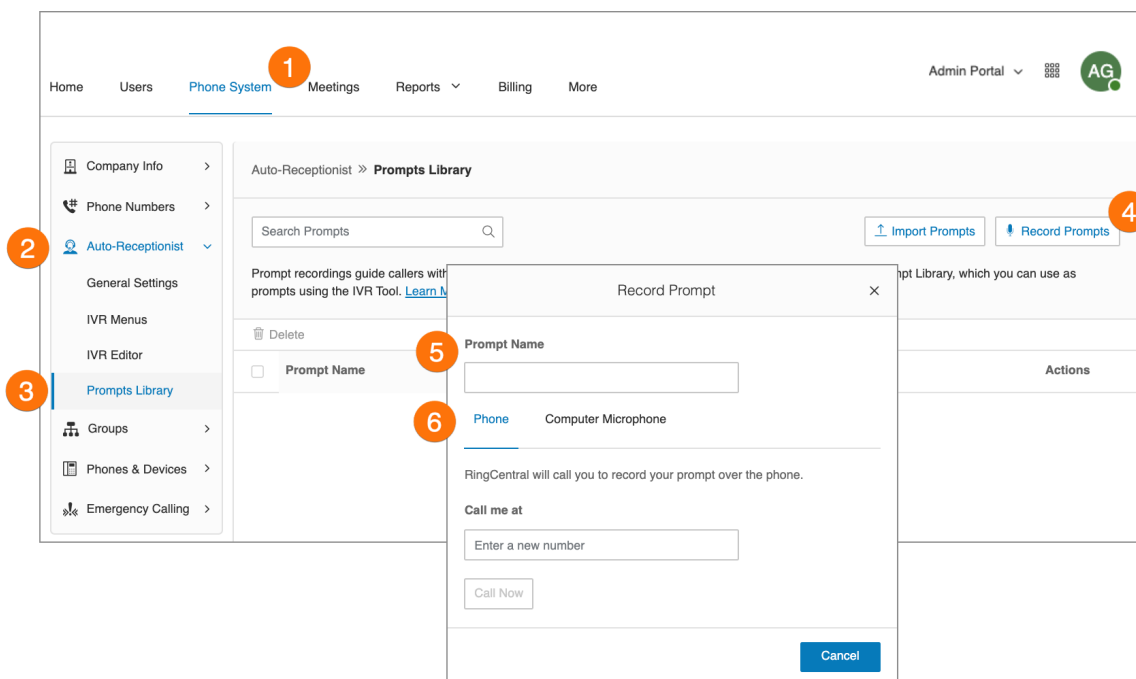
There are two prompt modes: audio and text-to-speech.

- Audio prompts are voice recorded
- Text-to-speech prompts are written by you, then RingCentral's automated system reads the prompt to your callers.

Note: An IVR menu can function independently from the Auto-Receptionist, so it does not have to be set up for an Auto-Receptionist greeting.

Recording an audio prompt

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**. The **Record Prompt** window will appear.
5. Enter a name for your prompt in the **Prompt Name** field.
6. Select one of these prompt methods and follow the on-screen instructions:
 - **Phone**
 - **Computer Microphone**
7. Follow the remaining on-screen instructions to record your prompt.



Selecting audio prompt mode

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus**.
4. Select an existing **IVR Menu**. The **Extension Info** will appear.
5. Click **Prompt**.
6. Under **Prompt mode**, select the button next to **Audio**.
7. Click **Select** under **Select Prompt**. The **Select Prompt** window appears with a list of pre-uploaded prompts.
8. Select the button next to the prompt you'd like to set.
9. Click **Select**.
10. Click **Save**.

You can listen to your new prompt by dialing into the extension.

The screenshot illustrates the process of selecting an audio prompt for an IVR menu in the RingCentral Admin Portal. The interface is divided into two main sections: the top section for IVR Menu management and the bottom section for the specific IVR Menu configuration.

Top Section: IVR Menu Management

- Step 1:** The **Phone System** tab is selected in the top navigation bar.
- Step 2:** The **Auto-Receptionist** option is selected in the left sidebar.
- Step 3:** The **IVR Menu** option is selected in the left sidebar.
- Step 4:** An existing IVR menu, **IVR Menu 1002**, is selected from the list.

Bottom Section: IVR Menu 1002 (Ext. 1002) Configuration

- Step 5:** The **Prompt** tab is selected in the left sidebar.
- Step 6:** Under **Prompt Mode**, the **Audio** radio button is selected.
- Step 7:** The **Select** button under **Select Prompt** is clicked.

Select Prompt Modal Window

- Step 8:** The **Audio prompt** is selected from the list of prompts.
- Step 9:** The **Select** button at the bottom right of the modal is clicked.
- Step 10:** The **Save** button at the bottom right of the main configuration area is clicked.

Selecting text-to-speech prompt mode

RingCentral's text-to-speech utility converts the text greeting you typed into a voice file and saves it to the IVR Prompt Library. Set an IVR prompt using text-to-speech. The text you enter must contain only letters, digits, space, commas, and periods. No special symbols. Use the words “hash” or “pound” or “star” instead of “#” or “*” if needed.

To set up a text-to-speech prompt for an IVR menu:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus**.
4. Select an existing **IVR Menu**. The **Extension Info** will appear.
5. Click **Prompt**.
6. Under **Prompt mode**, select the button next to **Text to speech**.
7. In the box for **Text**, type your desired greeting and connection instructions for your callers.
8. Click **Save**.

The first screenshot shows the Admin Portal navigation menu on the left. The 'Phone System' tab is selected (1). In the left sidebar, 'Auto-Receptionist' is selected (2), and 'IVR Menu' is selected (3). The main content area shows the 'Auto-Receptionist > IVR Menus' page. A table lists existing IVR menus: 'IVR Menu 1001' and 'IVR Menu 1002'. 'IVR Menu 1002' is selected (4).

The second screenshot shows the 'IVR Menu 1002 (Ext. 1002)' configuration page. On the left, the 'Prompt' tab is selected (5). In the 'Prompt Mode' section, the 'Text to speech' radio button is selected (6). In the 'Text' input field, the greeting 'Hi! How can I help you?' is entered (7). The 'Save' button is at the bottom right (8).

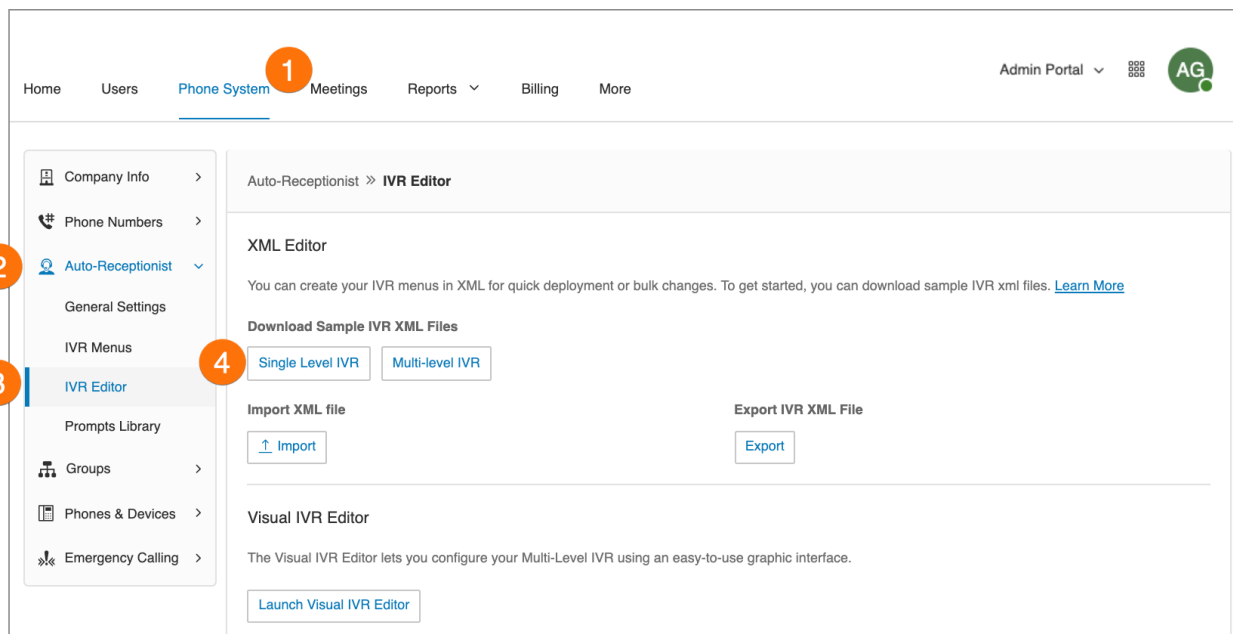
Importing or exporting XML files

In the XML section, you can import and export XML files for your IVR. Your IVR Menus are validated by RingCentral once you import an XML file.

Downloading a sample XML file

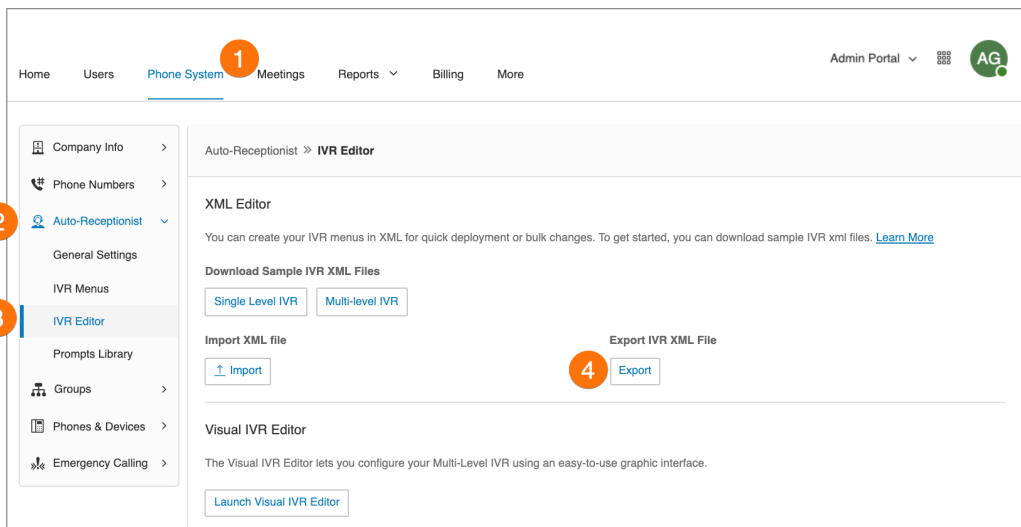
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**. The XML Editor displays.
4. Under **Download Sample IVR XML Files**,
 - Click **Single Level IVR**.
 - OR
 - Click **Multi-level IVR**.

The sample XML file is downloaded to your browser.



Exporting an XML file

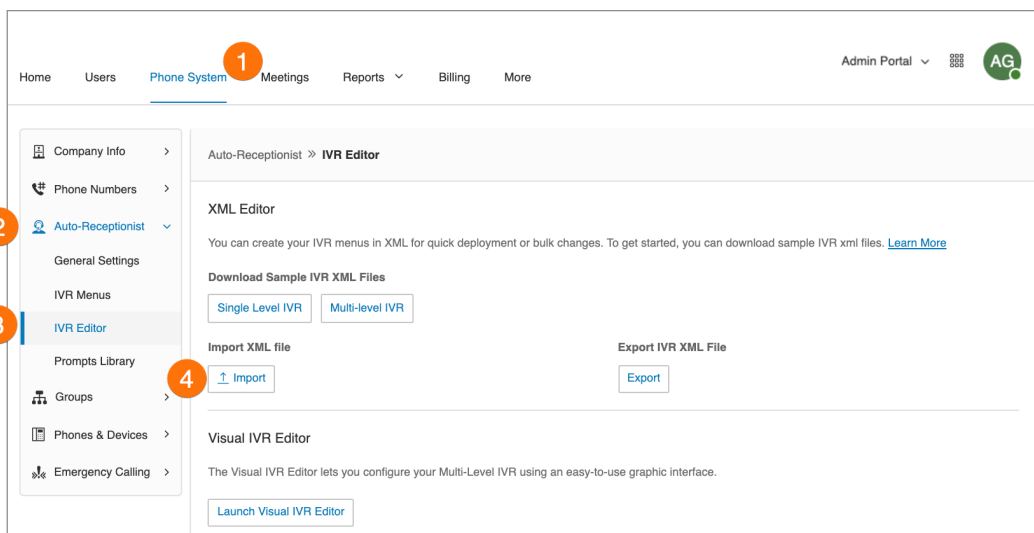
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**. The **XML Editor** displays.
4. Under **Export IVR XML File**, click **Export**. The sample XML file is exported to your browser.



Importing an XML file

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**. The **XML Editor** displays.
4. Under **Import XML file**, click **Import** to browse and locate the XML file. Then click **Import**.

RingCentral detects configuration issues as soon as you click Import. You can manually fix the errors in the XML file and upload it again or you can click Accept and Continue to manually fix the errors using your RingCentral Online account.



Recording greetings and messages

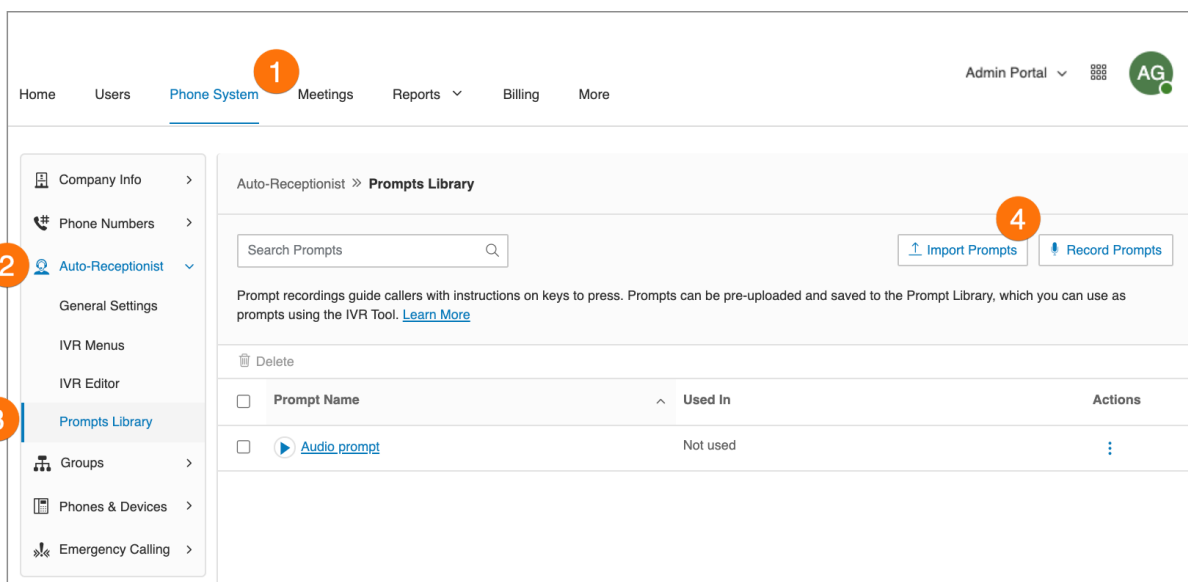
Several tasks require admins to record messages or greetings for your RingCentral system. These steps explain how to do the following:

- Record Over the Phone
- Record Using the Computer Microphone
- Import a WAV or MP3 file

Importing a WAV file for your IVR prompt

In the Prompts section, you can import or record your IVR prompts and edit prompts that have already been imported. To import a WAV file, do the following:

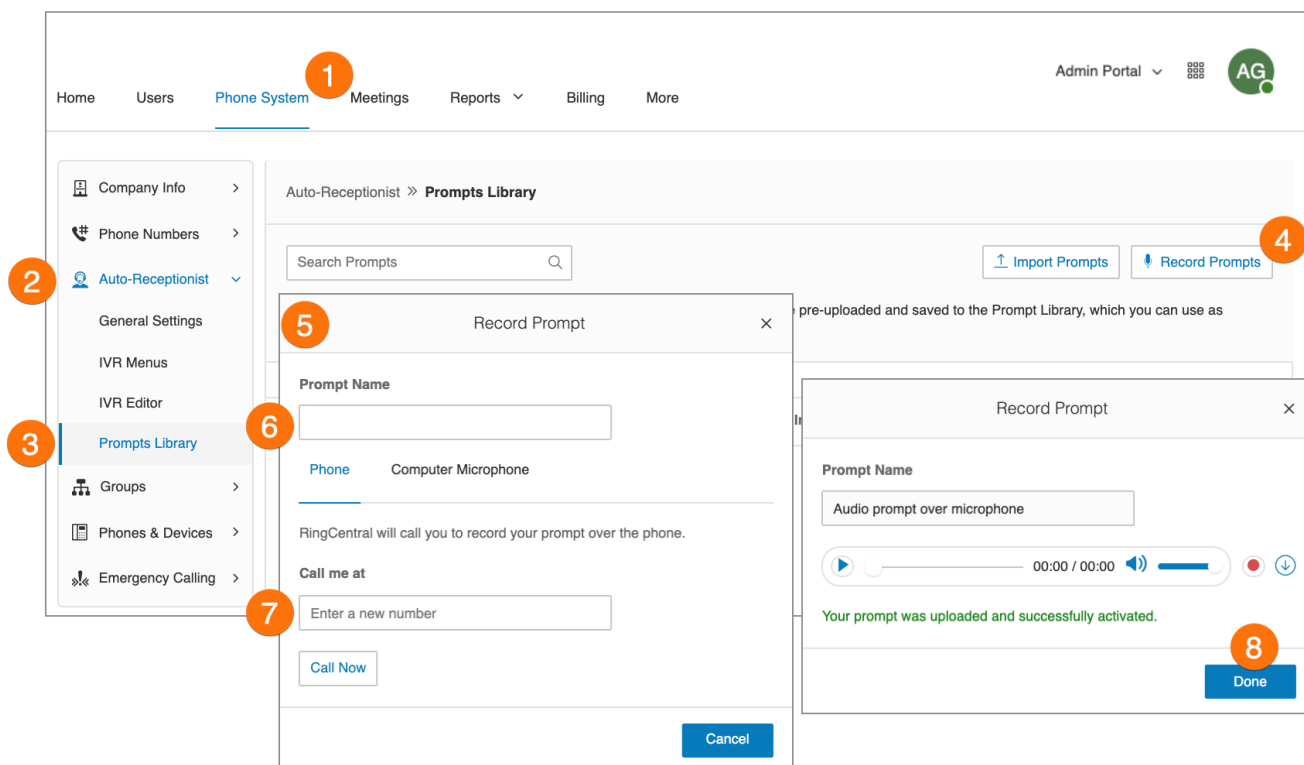
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click the **Import Prompts** button.
5. Navigate to the prompt file location.
6. Select the file and click **Open**.



Recording a prompt over the phone

Account admins and users with permissions can create a custom audio prompt. One way to create this prompt is to record the prompt using your phone.

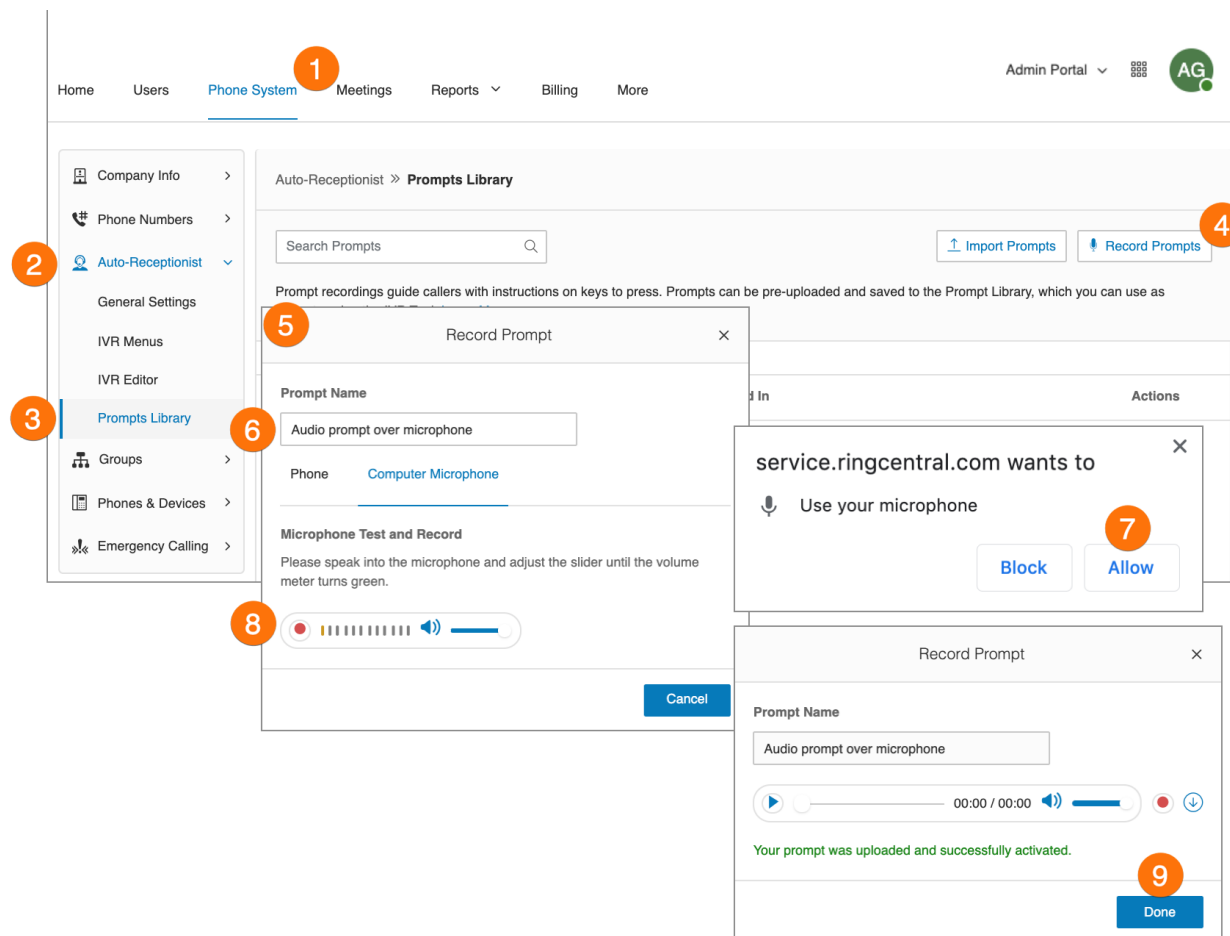
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. The **Record Prompt** window appears.
6. Enter a name in the text field next to **Prompt Name**.
7. Click **Phone**.
 - In the **Call me at** field, 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 your IVR prompt over your phone when prompted.
8. Click **Done**.



Recording a prompt using your computer microphone

Account admins and users with permissions can create a custom audio prompt. One way to create this prompt is to record the prompt using your computer microphone.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. The **Record Prompt** window will appear.
6. Enter a name for your prompt,
7. Click **Computer Microphone**. Click **Allow** if RingCentral asks to record through your computer.
8. The **Record Prompt** window will appear
 - When ready, click the red **Record** button to record or re-record your IVR prompt through your computer microphone.
 - Click the **Play** button to listen to your prompt and then click the **Record** button to re-record your IVR prompt.
 - Click the **Upload** button to save your recording to the Prompts Library.
9. Click **Done**.



Company custom rules

Company custom rules allow you to create different call experiences for incoming callers.

When an incoming call is received that matches any custom rule conditions you have set, for example, Caller ID, Dialed Number, or Date and Time, you can apply different call handling, such as playing the company greeting, ringing a user extension, call queue, or shared line, or send the call to voicemail.

After you create a custom rule, be sure to test the rule to verify that it works as intended.

Creating a custom rule

1. Click the **Phone System** tab from the **Admin Portal**.
2. Navigate to **Auto-Receptionist > General Settings**. Select a site if you have a multi-site account.
3. Click **IVR Settings**.
4. Under **Custom Answering Rules**, click **Add Custom Rule** or **Edit Custom Rule**.
5. Click **Add Rule**.

1 Phone System

Home Users **Phone System** Meetings Reports Billing More

2 Auto-Receptionist

Company Info
Company Address
Caller ID Name
Directory Assistance
Phone Numbers
Auto-Receptionist
General Settings
IVR Menus
IVR Editor
Prompts Library
Groups
Phones & Devices
Emergency Calling

3 IVR Settings

Auto-Receptionist >> General Settings

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

Company Hours
24 hours

Company Call Handling
Control what callers hear when they dial your company number during business or after hours. [Learn More](#)
Business Hours After Hours

Incoming calls will be routed to

☒ Company Greeting [?](#)
☐ User Extension [?](#)
☐ Call Queue Group [?](#)
☐ Shared Line [?](#)
☐ Voicemail [?](#)
☐ Announcement [?](#)

Play company greeting
00:00 / 00:00 [Edit](#)

If caller enters no action: Disconnect

Custom Answering Rules
You can create custom rules for special routing during holidays, specific time of the day (e.g. lunch break) or for special callers. [Learn More](#)

4 Add Custom Rule

Custom Answering Rule

Multi-condition advanced call handling rules offer powerful call management capabilities using conditions based on time of day, date range, incoming caller ID and called number. Please carefully test the call flows based on the rules set to ensure that the calls are being handled as expected.

[Learn more about advanced call handling](#)

5 + Add Rule

6. Enter Your Rule Name, then click Next.
7. [Define the call conditions](#), then click Next.

Continue to the following pages according to the rule condition(s) that you want to apply.

The image displays two sequential steps in the 'Custom Answering Rule' configuration process.

Step 1: Name Rule

- Header: Custom Answering Rule
- Progress: 1 Name Rule (active), 2 Define Conditions, 3 Define Call Handling
- Instruction: Enter a descriptive name for the rule.
- Field: Your Rule Name (6) with input 'My Rule 1'.
- Buttons: Cancel, Next.

Step 2: Define Conditions

- Header: Custom Answering Rule
- Progress: ✓ Name Rule, 2 Define Conditions (active), 3 Define Call Handling
- Conditions:
 - ☐ Caller ID (None)
 - ☐ Called Number (None)
 - ☐ Date and/or Time (None)
- Buttons: Back, Next.

Custom answering rule conditions

Custom rule condition - Caller ID

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

1. Click the checkbox next to **CallerID**.
2. Enter the phone number or contact name and click **Add**.
3. Click **Next**.
4. [Define the call handling action to be performed when the conditions are met](#). Call handling options include Company Greeting, User Extension, Call Queue Group, Shared Line, Voicemail, and Announcement.
5. Click **Save**.

Custom Answering Rule

✓ Name Rule 2 Define Conditions 3 Define Call Handling

1 ☒ **Caller ID**

Caller ID rules apply to calls coming from specific phone numbers. You can create a list of phone numbers to be used for this setting. (Numbers selected must be using Caller ID.)
When I receive calls from callers specified below.

Type Phone Number or Contact Name ⓘ

2 [Add](#)

(850) 555-5555

☐ **Called Number**
None

☐ **Date and/or Time**
None

3 [Back](#) [Next](#)

Custom Answering Rule

✓ Name Rule ✓ Define Conditions 3 Define Call Handling

4 Incoming calls will be routed to

☒ **Company Greeting** ⓘ

☐ User Extension ⓘ

☐ Call Queue Group ⓘ

☐ Shared Line ⓘ

☐ Voicemail ⓘ

☐ Announcement ⓘ

Play company greeting

00:00 / 00:00 [Edit](#)

If caller enters no action: Disconnect

5 [Back](#) [Save](#)

Custom rule condition - Called Number

Called Number applies the rule to the phone number dialed.

1. Click the checkbox next to **Called Number**.
2. Click **Select Number**, then select a number.
3. Click **Done**, and then click **Next**.
4. [Define the call handling action to be performed when the conditions are met](#). Call handling options include Company Greeting, User Extension, Call Queue Group, Shared Line, Voicemail, and Announcement.
5. Click **Save**.

The image consists of three screenshots from the RingCentral Admin Guide, illustrating the steps to configure a Custom Answering Rule.

Screenshot 1: Custom Answering Rule - Define Conditions

- Step 1: Under "When Selected Number(s) is Called:", the checkbox for "Called Number" is selected.
- Step 2: The "Select Number" button is highlighted.

Screenshot 2: Select Number

- Step 3: The "Select Number" dialog shows a list of numbers. The number "(913) 225-0145" is selected.

Screenshot 3: Custom Answering Rule - Define Call Handling

- Step 4: Under "Incoming calls will be routed to:", the radio button for "Company Greeting" is selected.
- Step 5: The "Save" button is highlighted.

Custom rule condition - Date and/or Time

This condition applies rules based on a time of day, week, or date range.

1. Click the checkbox next to **Date and/or Time**.
2. Configure one of the following under **Select When This Rule Should be Active**.
 - **Weekly Schedule:** Select the specific day of the week and a specific time to apply the custom rule.
 - **Specific Date Range:** Designate the dates when the custom rule begins and ends.
3. Click **Next**.

4. [Define the call handling action to be performed when the conditions are met](#). Call handling options include Company Greeting, User Extension, Call Queue Group, Shared Line, Voicemail, and Announcement.
5. Click **Save**.

Custom Answering Rule

✓ Name Rule 2 Define Conditions 3 Define Call Handling

☐ Caller ID
None

☐ Called Number
None

1 ☒ **Date and/or Time**

Date and/or Time rules apply based on a time of the day and week every week, or on a specific date range.

2 Select When This Rule Should be Active: [?](#)

☒ Weekly Schedule ☐ Specific Date Range

☐ Sunday

☒ Monday From: 12:00 PM To: 1:00 PM ☐ 24 hours [Apply to](#)

☒ Tuesday From: 12:00 PM To: 1:00 PM ☐ 24 hours [Apply to](#)

☒ Wednesday From: 12:00 PM To: 1:00 PM ☐ 24 hours [Apply to](#)

☒ Thursday From: 12:00 PM To: 1:00 PM ☐ 24 hours [Apply to](#)

☒ Friday From: 12:00 PM To: 1:00 PM ☐ 24 hours [Apply to](#)

☐ Saturday

3 [Back](#) [Next](#)

Custom Answering Rule

✓ Name Rule ✓ Define Conditions 3 Define Call Handling

4 Incoming calls will be routed to:

☒ Company Greeting [?](#)

☐ User Extension [?](#)

☐ Call Queue Group [?](#)

☐ Shared Line [?](#)

☐ Voicemail [?](#)

☐ Announcement [?](#)

Play company greeting

[▶](#) 00:00 / 00:00 [▶▶](#)

If caller enters no action: Disconnect

[Edit](#)

5 [Back](#) [Save](#)

Custom answering rule call handling actions

- **Company Greeting:** Plays your company greeting. You can customize the company greeting as needed.
- **User Extension:** Routes calls to a user extension.
- **Call Queue Group:** Routes calls to a call queue.
- **Shared Line:** Routes calls to a shared line.
- **Voicemail:** Routes calls to a voicemail box (message-only extension).
- **Announcement:** Routes calls to an announcement-only extension.

Note: Customers with the RingCentral MVP Essentials plan will not see the Shared Line option since they don't get it with their package.

Custom answering rule list

All created custom answering rules are listed when you follow these steps:

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

To add a custom rule, click **Add Rule**. Follow the instructions on the previous pages. To validate the list of created rules click **Validate**. To edit an existing rule, click **Edit**.

Call groups

RingCentral offers different types of groups for your phone system needs. Let's take a closer look at these groups:

- **Call Queues** are different from extensions. Call queues increase the efficiency of your company by directing the calls to the right employees. Call queues can support up to 25 calls waiting in a call queue. Queue overflow can be enabled to extend your call queue.
- **Paging Only** groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices
- **Shared Lines** allow calls made to one phone number to be answered by multiple phones. Answered calls can easily be handed off to other phones sharing the same phone number.

Note: Paging only and Shared lines are not available for on-line accounts.

- **Park Locations** are private locations for your employees to park and pick up calls. Create up to 100 park locations for different groups of users in your phone system.
- **Call Monitoring** allows you to set permissions that allow specific users to monitor the calls of other users.

Note: This feature is only available for MVP Premium and Ultimate users only.

- **Call Pickup Groups** allow group members to answer each other's calls from their own devices..
- **Message-Only Extensions** allow you to create a dedicated extension specifically for receiving voice messages. All calls routed to this extension are automatically directed to the extension's voicemail box.
- **Announcements-Only Extensions** allow you to create a dedicated extension specifically for playing an announcement. All callers that are routed to this extension will only hear a recorded announcement/greeting.
- **Limited Extensions** allow you to create an extension installed in a common area (meeting rooms or in hotel rooms) for anyone who has the need to access basic inbound/outbound calling capabilities.

Call queues

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

Adding a call queue group

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Click the **New Call Queue** button. The **Add Call Queue** window will appear.
5. Enter a **Group Name** and **Extension Number**.
6. Click **Select Call Queue** (optional) if you'd like to copy the settings from an existing call queue.
 - Select the button next to the call queue name.
 - Click **Done**.
7. Click **Next**.
8. Configure the following options:
 - a. If you'd like to have several managers for the call queue, select the button for **Select Managers From User List**.
 - Enter a PIN, then re-enter it on the fields provided.
 - Select managers and specify their permissions.
 - Click **Next**.
 - b. If you'd like to have one manager for the call queue, select **Use Manager's Email**.
 - Enter the email on the **Manager's Email** field.
 - Click **Next**.
9. Select the users you'd like to add to the group from the **Call Queue Members** list.
10. Click **Done**.

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2 3 **Groups** > **Call Queues** > Paging Only > Shared Lines > Park Locations > Call Monitoring > Others > Phones & Devices > Emergency Calling >

Groups » **Call Queues**

Create a call queue when you want a specific group of users to share incoming calls, such as a sales, billing, or customer support department. [Learn more](#)

Search + New Call Queue

1 Add Call Queue

5 Group Name **6** Extension Number

Copy Settings From (Optional) [Select Call Queue](#)

Cancel **7** Next

8 Add Call Queue

✓ Add Call Queue Details **2** Select Managers **3** Select Members

☒ Select Managers From User List ☐ Use Manager's Email

PIN

Reenter PIN

Select Managers

Select desired managers and assign each one a permission type "Full Access" or "Members Only". At least 1 manager must be assigned "Full Access".

Search

Show All | [Show Selected \(1\)](#)

<input checked="" type="checkbox"/>	Name	Ext.	Permission
<input checked="" type="checkbox"/>	Hank Hill	101	Full Access

Total: 1 < 1 > Back Next

9 Add Call Queue

✓ Add Call Queue Details ✓ Select Managers **3** Select Members

Search Department: All

Show All | [Show Selected \(1\)](#)

<input checked="" type="checkbox"/>	Name	Ext.	Department
<input checked="" type="checkbox"/>	Hank Hill	101	

Total: 1 < 1 > Back **10** Done

Configuring a call queue

After you have created a Call Queue, you can configure the Call Queue Info, Direct Numbers, Greeting, Call Handling, and Messages & Notifications.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select an existing **Call Queue**. If you don't have any existing call queues, go to the previous page to learn how to create one.
5. Edit your settings:
 - a. **Call Queue Details**
 - Extension Number
 - Group Name
 - Record Group Name
 - Company Name
 - Contact Phone
 - Manager Email
 - Password
 - Delete Group
 - Regional Settings
 - Business Hours
 - Address
 - Confirmation Message
 - Video Service
 - b. **Direct Numbers**
 - Add Direct Number
 - c. **Greeting & Hold Music**
 - Call Queue Greeting
 - Audio While Connecting
 - Hold Music
 - Interrupt Audio
 - Blocked Calls
 - d. **Call Handling & Members**
 - Business Hours
 - After Hours
 - Wait Settings
 - Display Settings
 - Overflow
 - Custom Rules
 - Call Queue Members
 - e. **Messages & Notifications**

- Voicemail Greeting
- Message Recipient
- Notification Settings

6. Click **Save**.

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Admin Portal AG

Groups » **Call Queues**

Create a call queue when you want a specific group of users to share incoming calls, such as a sales, billing, or customer support department. [Learn More](#)

Search + New Call Queue

Stat...	Name	Numbers	Ext.	Msg.	Members Availability	Actions
Stat...	Name	Call Queue Test (Ext. 1)				
✓	Call Queue Test					

Call Queue Test (Ext. 1)

Call Queue Details

Direct Numbers

Greeting & Hold Music

Call Handling & Members

Messages & Notifications

Business Hours After Hours Settings

Voicemail Greeting: Default

Message Recipient: Ext. 1, This call queue

Select Extension

Edit

Cancel Save

Configuring call queue-to-queue overflow

Call queue-to-queue overflow allows scalable management of inbound calls during heavier-than-usual or peak-season inbound call activity. You can append existing queues to the original queue, so if all lines are busy in the original queue, calls overflow to additional queues.

Call handling follows the call queue policy. Call queue overflow is supported for the Rotating and In Fixed Order sequence protocols. The Simultaneous protocol is not supported.

The **Overflow Call Queues** section lets you enable, create, and manage your overflow queues.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select an existing call queue group. The call queue group must be configured with either a *Rotating* or *Sequential* call handling protocol.
5. Click **Call Handling & Members**.
6. Click the arrow down additional options icon and click **Overflow**.
7. Click the toggle on to enable the Overflow Queue feature. Select a maximum of three groups from the call queue list.
8. Click **Save**.

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info >

Phone Numbers >

Auto-Receptionist >

Groups >

Call Queues

Paging Only

Shared Lines

Park Locations

Call Monitoring

Others

Phones & Devices >

Emergency Calling >

Groups » **Call Queues**

Create a call queue when you want a specific group of users to share incoming calls, such as a sales, billing, or customer support department. [Learn More](#)

Search

+ New Call Queue

Stat...	Name
✓	Call Queue Test
✓	Call Queues Test Two

Call Queue Test (Ext. 1)

Call Queue Details

Direct Numbers

Greeting & Hold Music

Call Handling & Members

Business Hours After Hours Wait Settings Display Settings

Decide How Calls Get Transferred to Group Members

Rotating

Overflow

Custom Rules

Greeting & Hold Music

Call Handling & Members

Business Hours After Hours Wait Settings Display Settings

7 ☒ Enable Send Calls to Overflow Queue

Select call queues (3 maximum)

Search

Select	Order	Status	Name	Ext.
<input type="checkbox"/>	N/A	✓	Call Queues Test Two	2

Cancel **8** Save

Adding a direct number

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select an existing **Call Queue**.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Select a **Location** and follow these instructions for the **Number Type** you choose.
 - a. **Local Number**: Select **Local Number**. Provide the State and Area Code and select number.
 - b. **Toll-Free**: Select **Toll-Free Number**. Select a Toll-Free prefix and select a number from the list of available numbers.
 - c. **Vanity**: Select **Vanity**. Choose a number that helps customers remember your business phone number. Click **Search** to see if it is available.
8. Click **Next** when finished choosing your number.

The screenshot illustrates the process of adding a direct number to a call queue in the RingCentral Admin Portal. The interface is divided into a top navigation bar, a left sidebar, and a main content area. The top navigation bar includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The left sidebar contains a list of options: Company Info, Phone Numbers, Auto-Receptionist, Groups (highlighted with a red circle 2), Call Queues (highlighted with a red circle 3), Paging Only, Shared Lines, Park Locations, Call Monitoring, Others, and Phones & Devices. The main content area shows the 'Groups > Call Queues' section. It includes a search bar, a '+ New Call Queue' button, and a table of existing call queues. The table has columns for 'Stat...' and 'Name'. Two call queues are listed: 'Call Queue Test' and 'Call Queues Test Two', both with a green status icon. The 'Call Queue Test' row is selected (highlighted with a red circle 4). To the right of the table, there is a 'Call Queue Test (Ext. 1)' panel with a 'Call Queue Details' section and a 'Direct Numbers' section (highlighted with a red circle 5). The 'Direct Numbers' section has an '+ Add Direct Number' button (highlighted with a red circle 6). Below the main content area, there is a modal window titled 'Add Direct Number' (highlighted with a red circle 7). The modal has three tabs: '1 Select Numbers' (active), '2 Confirm Order', and '3 Order Confirmation'. The 'Select Numbers' tab contains a 'Select Numbers' section with two columns: 'Location' and 'Number Type'. The 'Location' column has a dropdown menu with 'Domestic - US/Canada' selected. The 'Number Type' column has a dropdown menu with 'Local Number' selected. Below these, there are 'State' and 'Area Code' dropdown menus. At the bottom of the modal, there are 'Add Numbers', 'Cancel', and 'Next' buttons. The 'Next' button is highlighted with a red circle 8.

Setting call queue greeting and hold music

If you would like your callers to hear a recorded greeting before being connected to a call group, turn on the Call Queue greeting. In this section, you can also set the audio while connecting, hold music, and if you want to interrupt audio.

Note: If you have set custom call queue hours, follow these steps for both the Call Queue Hours and After Hours tabs.

To set call queue greeting and hold music, follow the steps below:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select an existing **Call Queue**.
5. Click **Greeting & Hold Music**.
6. Tick the checkbox for each of the following to enable the settings and click **Edit**:
 - **Call Queue Greeting:** Choose your preferred type of greeting:
 - **Default:** Select **Default** if you want to use a system-default call queue greeting
 - **Custom:** Select **Custom** and select how you'd like to set your custom recording:
 - **Phone:** Next to **Call me at**, choose a phone number from the dropdown 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
 - **Computer Microphone:** Click **Allow** if RingCentral asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your greeting through your computer microphone. Stop the recording and listen to the playback
 - **Importing:** Browse for a WAV or MP3 file you want to use. Click **Open**
 - **Audio While Connecting:** Set the audio to the following:
 - **Ring Tones:** Select **Ring Tones** if you want your callers to hear ring tones while the call is being connected
 - **Music:** Select **Music** if you want callers to hear music
 - **Custom:** Select **Custom** if you want to upload your own audio file. Click **Browse** and select your audio.
 - **Hold Music:** Set what you want callers to hear when you put a call on hold
 - **Ring Tones:** Select **Ring Tones** if you want your callers to hear ring tones while the call is being connected
 - **Music:** Select **Music** if you want callers to hear music
 - **Custom:** Select **Custom** if you want to upload your own audio file. Click **Browse** and select your audio.

- **Interrupt Audio:** Set this if you want callers to hear an audio prompt playing in specific intervals while waiting for a call queue member to answer the call. Select from the dropdown list how often the audio will be interrupted by the prompt and set your **Interrupt Prompt:**
 - **Default:** Select **Default** if you want to use a system-default recording and select your preferred audio from the options provided.
 - **Custom:** Select **Custom** if you want to utilize a fully customized audio recording using the available options.

7. Click **Done**.

8. Click **Save**.

Incoming call handling

Choose how you'd like each call queue to handle incoming calls. Set the order in which the calls will be transferred to the members of the call queue.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Click the name of the **Call Queue** you'd like to configure.
5. Select **Call Handling & Members > Business Hours** to edit your call handling settings.
6. Select the order in which calls are transferred to department members:
 - a. **Rotating:** Regularly changes the order that you ring available members to evenly distribute the calls.
 - b. **Simultaneous:** Routes an incoming call to all available members at the same time.
 - c. **Sequential:** Ring available members one at a time in the order you set.
7. Click **Save**.

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info > Phone Numbers > Auto-Receptionist > **Groups** > **Call Queues** > Paging Only > Shared Lines > Park Locations > Call Monitoring > Others > Phones & Devices > Emergency Calling >

Groups » **Call Queues**

Create a call queue when you want a specific group of users to share incoming calls, such as a sales, billing, or customer support department. [Learn More](#)

Search + New Call Queue

Stat...	Name
✓	Call Queue Test
✓	Call Queues Test Two

Call Queue Test (Ext. 1)

Call Queue Details

Direct Numbers

Greeting & Hold Music

Call Handling & Members

Business Hours After Hours Wait Settings Display Settings

Decide How Calls Get Transferred to Group Members [?](#)

Rotating + Add Call Queue Member

Name	Ext.	Actions
Hank Hill	101	

Cancel Save

Messages and notifications

In this section, set your message recipient, voicemail greeting, and notifications. RingCentral allows each Call Queue a separate voicemail message to greet unanswered calls, as well as allowing you to set a recipient for these voicemails.

Setting a voicemail greeting

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select a **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Edit** under **Voicemail Greeting**.
7. A window will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting
 - **Default**: Select **Default** if you want to use a system-default voicemail greeting.
 - **Custom**: Select **Custom** and select how you'd like to set your custom recording.
 - **Phone**: Next to **Call me at**, choose a phone number from the dropdown list 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
 - **Computer Microphone**: Click **Allow** if RingCentral asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your greeting through your computer microphone. Stop the recording and listen to the playback
 - **Import**: Browse for a WAV or MP3 file you want to use. Click **Open**.
8. Click **Done**.
9. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface for managing Call Queues. The top navigation bar includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The left sidebar contains a menu with options like Company Info, Phone Numbers, Auto-Receptionist, Groups, Call Queues (highlighted with a red circle 2), Paging Only, Shared Lines, Park Locations, Call Monitoring, Others, Phones & Devices, and Emergency Calling. The main content area is titled 'Groups > Call Queues' and includes a search bar, a '+ New Call Queue' button, and a table of existing queues. The table has columns for Status, Name, and a link to edit. Two queues are listed: 'Call Queue Test' and 'Call Queues Test Two', both with a green status icon. A red circle 3 points to the 'Call Queues' menu item, and a red circle 4 points to the 'Call Queue Test' link. A red circle 5 points to the 'Messages & Notifications' section in the right-hand panel. A red circle 6 points to the 'Edit' button at the bottom of the table. A red circle 7 points to the 'Voicemail Greeting' modal window, which is open and shows options for setting a greeting (Custom, Phone, Computer Microphone, Importing) and a 'Call me at' number. A red circle 8 points to the 'Done' button in the modal, and a red circle 9 points to the 'Save' button at the bottom right of the page.

1

2

3

4

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6

7

8

9

Setting message recipients

After you have set your Voicemail Greeting, you can set which users or call queues to receive messages. To do this, follow the steps below:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select a **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Select Extension** under **Message Recipient**.
7. A window will appear with a list of members to receive messages left for this call queue.
8. Select the button next to the recipient.
9. Click **Done**.
10. Click **Save**.

The screenshot illustrates the steps to set message recipients for a call queue in the RingCentral Admin Portal. The interface is divided into a sidebar, a main content area, and a modal window.

Step 1: The **Phone System** tab is selected in the top navigation bar.

Step 2: The **Groups** option is selected in the sidebar.

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

Step 4: A call queue is selected from the list. The selected queue is **Call Queue Test**.

Step 5: The **Messages & Notifications** section is expanded.

Step 6: The **Select Extension** button is clicked under the **Message Recipient** section.

Step 7: The **Select Message Recipient** modal window appears, showing a list of members to receive messages.

Step 8: The button next to the recipient **Hank Hill** is selected.

Step 9: The **Done** button is clicked.

Step 10: The **Save** button is clicked.

The modal window displays the following table:

Select	Name	Ext.	Type	Department
<input checked="" type="radio"/>	Hank Hill	101	User	
<input type="radio"/>	This call queue	1	Call Queue	

The modal window also includes a search bar, a dropdown menu for **Extens...**, a **Show** dropdown set to **10**, and **Cancel** and **Done** buttons.

Setting voicemail-to-text transcription

The voicemail-to-text transcription provides a text version of your voicemail that allows you to get the gist of the message. The voicemail transcription is delivered to your RingCentral mobile or desktop application or via email.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select an existing **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Settings**.
7. Click the toggle switch to enable or disable **Voicemail-to-Text**

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with a red circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. The left sidebar contains a menu with 'Company Info', 'Phone Numbers', 'Auto-Receptionist', 'Groups' (highlighted with a red circle 2), 'Call Queues' (highlighted with a red circle 3), 'Paging Only', 'Shared Lines', 'Park Locations', 'Call Monitoring', 'Others', 'Phones & Devices', and 'Emergency Calling'. The main content area is titled 'Groups » Call Queues' (highlighted with a red circle 4). It features a search bar, a '+ New Call Queue' button, and a table of call queues. The table has columns 'Stat...' and 'Name', with two entries: 'Call Queue Test' and 'Call Queues Test Two', both marked with green checkmarks. A red circle 5 highlights the 'Messages & Notifications' section on the right. Within this section, the 'Settings' tab is selected (highlighted with a red circle 6). The 'Voicemail to Text' toggle switch is shown in the 'On' position (highlighted with a red circle 7).

Setting notifications

As an administrator, you can set up notifications to be sent to your phone or email when voicemails, faxes, missed calls, and text messages are received for each call queue. To do this, follow the steps below:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select a **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Settings**.
7. Click **Edit** under **Notifications**.
8. A pop-up will appear with notification options. Set your notifications by checking the boxes and filling in email and phone numbers.
 - a. Click **Basic Settings** > **Advanced Settings** to see more detailed notification settings.
 - b. Set your **Advanced Settings**. Here, you can customize your notifications for voicemail messages, received faxes, and received text messages. You can choose different email addresses and phone numbers for your notifications, and select options for email attachments.
9. Click **Save**.

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info > Phone Numbers > Auto-Receptionist > **Groups** > **Call Queues** > Paging Only > Shared Lines > Park Locations > Call Monitoring > Others > Phones & Devices > Emergency Calling >

Groups » **Call Queues**

Create a call queue when you want a specific group of users to share incoming calls, such as a sales, billing, or customer support department. [Learn More](#)

Search [+ New Call Queue](#)

Stat...	Name
✓	Call Queue Test
✓	Call Queues Test Two

Call Queue Test (Ext. 1)

Call Queue Details

Direct Numbers

Greeting & Hold Music

Call Handling & Members

Messages & Notifications

Business Hours After Hours **Settings**

Notifications [Edit](#) Voicemail to Text ☒ On

Notifications

	By Email	By SMS
Voicemail Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Received Faxes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Missed Calls	<input type="checkbox"/>	<input type="checkbox"/>
Received Text Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Send Notifications to

Manager Name Emails

Hank Hill stricklandpropane135losgatosrd@gmail.com

Email

Email@example.com

Select Carrier Phone Number

Select Carrier + Add

My carrier is not listed

[Cancel](#) [Save](#)

Paging only groups

Paging Only groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices. Paging Only groups are great for a variety of locations such as warehouse/shipping centers, retail stores, schools, and hospitals, among others.

You can page using a special phone with a paging soft- key, or by dialing *84 from your digital desk phone or from your VoIP calling-enabled mobile phone. In each case, you need to set up the Group number or the number representing a group of extensions receiving a paged message prior to the page.

Adding a paging only group

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Select **Paging Only**.
4. Select **New Paging Only** button in the upper right.
5. Enter the **Group Name** and **Extension Number**.
6. Click **Save**.

Note: This feature is available for accounts with two or more users.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with a red circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. The left sidebar contains a list of options: 'Company Info', 'Phone Numbers', 'Auto-Receptionist', 'Groups' (highlighted with a red circle 2), 'Call Queues', 'Paging Only' (highlighted with a red circle 3), 'Shared Lines', 'Park Locations', 'Call Monitoring', 'Others', 'Phones & Devices', and 'Emergency Calling'. The main content area is titled 'Groups » Paging Only'. It includes a descriptive text about paging groups, a search bar, and a '+ New Paging Only' button (highlighted with a red circle 4). Below this is a table with columns 'Stat...', 'Name', 'Ext.', and 'Actions'. An 'Add Paging Group' modal window is open, showing fields for 'Group Name' (containing 'Page Group Test', highlighted with a red circle 5) and 'Extension Number' (containing '3'). At the bottom of the modal are 'Cancel' and 'Save' buttons (the 'Save' button is highlighted with a red circle 6).

Configuring a paging only group

After you set up a paging group, select the devices to receive pages from the list of paging devices and user phones that have this capability.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Select **Paging Only**.
4. Select a **Paging Only** group.
5. In the **Paging Only Details** tab, edit your extension number, group name, disable the extension, or delete the group.
6. Click **Save**.
7. Click the **Paging** tab.
8. Click **Devices to Receive Page**: Select the **User Phones** or **Paging Devices** to receive pages.
9. Click **Users Allowed to Page this Group**: Select the users who are to be allowed to page.
10. Click **Save**.

The screenshot illustrates the 'Paging Only' configuration process in the RingCentral Admin Portal. The interface is divided into a sidebar, a main content area, and two modal windows.

Sidebar (Left): Contains navigation options: Company Info, Phone Numbers, Auto-Receptionist, Groups, Call Queues, Shared Lines, Park Locations, Call Monitoring, Others, Phones & Devices, and Emergency Calling. The 'Groups' option is highlighted with a red circle 2, and the 'Paging Only' option is highlighted with a red circle 3.

Main Content Area: Displays the 'Paging Only' configuration page. The top navigation bar includes Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Phone System' tab is selected with a red circle 1. The main content area shows a 'Paging Only' group configuration page. The 'Groups' section is highlighted with a red circle 4. The 'Paging Only' group is listed with a red circle 5. The 'Paging Only Details' section is highlighted with a red circle 6. The 'Paging Only' group is highlighted with a red circle 7.

Modal Windows:

- Paging - Customer Service (Ext. 1):** This modal window is used to configure the 'Paging Only' group. It includes fields for 'Extension Number' (1), 'Group Name' (Paging - Customer Service), and 'Status' (Enabled). A 'Disable' button is also present. The 'Save' button is highlighted with a red circle 6.
- Paging:** This modal window is used to select devices and users for the 'Paging Only' group. It includes a search bar, a 'Phone Type' dropdown (Paging De...), and a 'Sites' dropdown. The 'Show All' button is highlighted with a red circle 8. The 'Paging' modal window is highlighted with a red circle 7.
- Paging - Customer Service (Ext. 1):** This modal window is used to select users for the 'Paging Only' group. It includes a search bar, a 'Department' dropdown (All), and a 'Sites' dropdown. The 'Show All' button is highlighted with a red circle 9. The 'Paging - Customer Service (Ext. 1)' modal window is highlighted with a red circle 10.

Tables:

Table 1: Paging - Customer Service (Ext. 1)

Name	Ext.	Department	Site
Aaron Lee	11113		Company
Ada Smith	100		Company
Allen Test	11138		Company
Anne Smith	11129		Company
Billing qwerty	11127		Company
Bob Smith	11107		Company
EA Phone	11106		Company
Executive Jones	11120		Company
Executive Smith	11125	q	Company
Jack Manning	11108	KB	Company

Table 2: Paging - Customer Service (Ext. 1)

Phone Type	Phone Name	Ext.
Paging Device	Paging Device	-
Paging Device	Test Page	-
Paging Device	Warehouse Paging Device	-

Shared line groups

The Shared Lines feature allows calls made to one phone number to be answered by up to 16 phones as a designated group. Multiple groups of shared lines can be set up. Answered calls can easily be handed off to other phones sharing the same phone number.

Adding a shared line group

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Click **New Shared Line**. The **Add Shared Line** window will appear.
5. Select a location: **Domestic** or **International**.
6. Enter the **Group Name**, **Manager's Email**, and **Extension Number**.
7. Click **Next**.
8. Follow the prompts to add phone lines, the order of phone number, and devices.
9. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with a red circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. The 'Admin Portal' dropdown and a user profile icon are on the right. A left sidebar contains a menu with 'Company Info', 'Phone Numbers', 'Auto-Receptionist', 'Groups' (highlighted with a red circle 2), 'Call Queues', 'Paging Only', 'Shared Lines' (highlighted with a red circle 3), 'Park Locations', 'Call Monitoring', 'Others', 'Phones & Devices', and 'Emergency Calling'. The main content area shows 'Groups > Shared Lines'. A descriptive text states: 'The Shared Lines feature allows calls made to one phone number to be answered by up to 16 phones within a designated group. [Learn More](#)'. Below this is a search bar, a 'Sites' dropdown, and a '+ New Shared Line' button (highlighted with a red circle 4). An 'Add Shared Line' modal window is open, showing a progress bar with steps: 1 Setup, 2 Add Lines, 3 Add Phones, 4 Add Emergency Address, 5 Add Shipping Info, and 6 Confirm. The 'Setup' step is active. It is divided into two sections: 'Select a Location' (highlighted with a red circle 5) with radio buttons for 'Domestic' (selected) and 'International', and 'Group Details' (highlighted with a red circle 6) with input fields for 'Site' (dropdown), 'Group Name' (text), 'Manager's Email' (text), and 'Short Extension Number' (text). The 'Full Extension Number' is displayed as '11006'. At the bottom right of the modal, there are 'Cancel' and 'Next' buttons (highlighted with a red circle 7).

Configuring a shared line group

Configure the Shared Lines group's name, password, business hours, and regional settings. You can also apply a template to the group. Edit your extension number, name, or delete your menu.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select a shared line from the list.
5. Click **Shared Line Details**.
6. Edit the details under the following:
 - a. **General**
 - Extension Number
 - Group Name
 - Manager Email
 - Password
 - Status
 - Record Group Name
 - b. **Settings**
 - Regional Settings
 - Site
 - Confirmation Message
 - Business Hours
 - Shared Lines Devices
 - Automatic Call Recording
7. Click **Save**.

Adding a direct number

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

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Select a **Location** and follow these instructions for the **Number Type** you choose:
 - a. **Local Number**: Provide the State and Area Code. Select one or more numbers and click **Add Numbers**.
 - b. **Toll-Free Number**: Select **Toll-Free Number** and a toll-free prefix. Select one or more numbers and click **Add Numbers**.

- c. **Vanity Number:** Select **Vanity**. Choose a number that helps customers remember your business phone number. Click **Search** to see if it is available. Select a number and click **Add Numbers**.
8. Click **Next** after choosing your number. Follow the prompts to purchase your new number.

Setting a greeting

Set a greeting and keep the default, or record a custom group greeting.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Click **Greeting** and then click Business Hours.
6. Tick the checkbox below the following to enable the feature:
 - a. **Shared Line Greeting**
 - b. **Audio While Connecting**
 - c. **Hold Music**
7. Choose your preferred type of greeting:
 - a. **Default:** To use the provided greeting, click **Default**.
 - b. **Custom:** Select **Custom** and select how you'd like to set your custom recording:
 - **Phone:** Next to Call me at, choose a phone number from the dropdown list 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.
 - **Computer Microphone:** Click **Allow** if RingCentral asks to record through your computer. The **Microphone Test and Record** settings appear. When ready, click the red **Record** button to record your greeting through your computer microphone. Stop the recording and listen to the playback.
 - **Importing:** Browse for a WAV or MP3 file you want to use. Click **Open**.
8. Click **Save**.

Managing blocked calls

Select Blocked Calls tab to block specific calls or all calls for this call group. Then, set up the message blocked callers will hear.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Click **Greeting** and then click Blocked Calls.
6. Click **Edit** under **Callers will hear** section. The **Callers will Hear** window will appear.

7. Click dropdown list under **View In** and select language.
8. Tick to select a default greeting under **Callers will hear**. Click the play button to listen to the preview.
9. Click **Done**.
10. Click **Save**.

Setting custom music on hold

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

- Ring Tones
- Music: Acoustic, Beautiful, Classical, Corporate, Country, Holiday, Latin, Modern Jazz, Nature, Reggae, World
- Upload custom file in WAV or MP3 format

To set up custom Music on hold:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Select **Greeting** and select **Business Hours**.
6. Under **Hold Music**, check **Enable**.
7. Click **Edit** under **Hold Music**.
8. Click the dropdown under **Set Audio** and select **Custom**.
9. Click **Browse**.
10. Select your audio.
11. Click **Done**.
12. Click **Save**.

Managing call handling

Review or change each option for handling incoming calls for both business hours and after hours.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Select **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Click **Call Handling**.
6. Configure the following under **Business Hours**:
 - a. **When all lines are busy, forward calls to:**

- Click **Edit**.
 - Select **Group Voicemail** or an extension.
 - Click **Done**.
 - b. Select an option on the dropdown menu under **Number of seconds to wait before forwarding unanswered calls**.
7. Click **After Hours**.
- a. The **Confirmation** window will appear if the business hours for the group is set to 24 hours a day. Click **Yes** and then change the business hours.
 - b. Click **Save**.
 - c. Click the dropdown menu under **How to handle calls during after hours**.
 - d. Click your selection.
 - e. If you selected unconditional forwarding, enter the number where calls should be forwarded under **Forward Calls**.
8. Click **Save**.

Managing outbound caller ID

Set up an outbound caller ID for the group, or use individual numbers as caller IDs for each line.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Click **Outbound Caller ID**.
6. Click the dropdown under **Outgoing Call Displayed as**.
7. Select *Group or Individual Lines*.
8. If you selected *Group*, click **Edit** below the dropdown box.
9. Select a phone number you want to display as your caller ID number for the outgoing call. Click **Done**.
10. Click **Edit** below **Alternate Caller ID**. Select a phone number you want to display as your Caller ID number for Alternate Caller ID. Click **Done**.
11. Click **Save**.

Messages and notifications

Set up a group voicemail and notification options.

Setting up voicemail greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Shared Lines**.

4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.
6. **Take Messages** feature is enabled by default. To disable the group from taking messages during business hours, uncheck **Enable**.
7. Click the **Play** button to listen to the default voicemail greeting. To customize, click **Edit** below **Voicemail Greeting**.
8. Click the drop-down box under **Set Greeting**, then select **Custom**.
9. Click the tab corresponding to how you prefer to customize the greeting:
 - **Phone:** Next to **Call me at**, choose a phone number from the dropdown list 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.
 - **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.
 - **Importing:** Browse for a WAV or MP3 file you want to use. Click **Open**.
10. Click **Done**.
11. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface for configuring Shared Lines. The top navigation bar shows the 'Phone System' tab selected. The left sidebar contains a 'Groups' menu with 'Shared Lines' highlighted. The main content area shows the 'Shared Lines' configuration page for 'Group 1 (Ext. 11006)'. The 'Messages & Notifications' section is expanded, showing the 'Take Messages' settings. The 'Voicemail Greeting' modal is open, showing the 'Set Greeting' dropdown set to 'Custom' and the 'Message Recipient' section with 'This Extension (Ext. 11006)' selected. The 'Call me at' section is also visible, showing a field for 'Enter a new number' and a 'Call Now' button.

Setting a message recipient

Set a message recipient for a Shared Line.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.

6. Ensure that the checkbox for **Take Messages** is ticked.
7. Below **Message Recipient**, click **Select Extension**.
8. Select the extension.
9. Click **Done**.
10. Click **Save**.

Setting voicemail-to-text

The voicemail-to-text transcription provides a text version of your voicemail that allows you to get the gist of the message. The voicemail transcription is delivered to your RingCentral mobile or desktop application or via email.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.
6. Click **Settings**.
7. Click the toggle switch to enable or disable **Voicemail-to-text**.

Setting notifications

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

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.
6. Click **Settings**.
7. A pop-up will appear with notification options. Set your notifications by checking the boxes and filling in email and phone numbers.
8. Click **Basic Settings** > **Advanced Settings** to see more detailed notification settings.
9. Set your **Advanced Settings**. Here, you can customize your notifications for voicemail messages, received faxes, and received text messages. You can choose different email addresses and phone numbers for your notifications, and select options for email attachments.
10. Click **Save**.

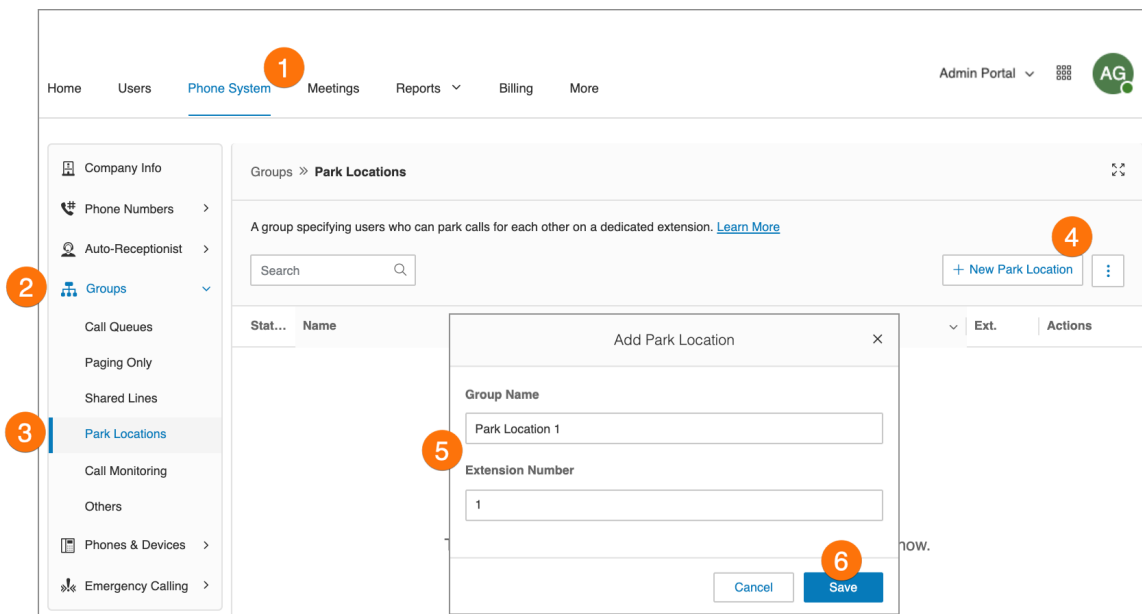
Park location groups

Use Park Location groups to create a private location in which specific users can park and pick up calls. Once users have been added to the group, the park location can be added to the user's Presence on a desk phone or HUD in the RingCentral app. You can have up to 100 park locations in your phone system.

Adding a park location

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Park Locations**.
4. Click **New Park Location**. The **Add Park** window will appear.
5. Enter the **Group Name** and **Extension Number**.
6. Click **Save**.

Note: Only one call can be parked in each location at a time.



Configuring a park location

After you have created a Park Location, you can edit its information and the users in the group.

To edit your Park Location's Extension Number and Name:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Park Locations**.
4. Select an existing **Park Location**.
5. Click **Park Location Details**.
6. Edit the **Extension Number** and **Park Location**.
7. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface with several steps highlighted by orange circles:

- Step 1:** The **Phone System** tab is selected in the top navigation bar.
- Step 2:** The **Groups** option is selected in the left sidebar.
- Step 3:** The **Park Locations** option is selected in the left sidebar.
- Step 4:** A table lists existing Park Locations. The first entry, **Park Location 1**, is selected.
- Step 5:** The **Park Location Details** modal is open, showing the details for **Park Location 1 (Ext. 1)**.
- Step 6:** The **Extension Number** field is set to **1**, and the **Group Name** field is set to **Park Location 1**.
- Step 7:** The **Save** button is highlighted in the bottom right corner of the modal.

The modal also shows a **Status** section with **Enabled** selected and a **Disable** button. At the bottom, there is a **Location Members** section with a list of members.

Adding members to a park location

To add or remove users from a Park Location:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Park Location**.
4. Select an existing **Park Location**.
5. Click **Location Members**.
6. Select the names of the Users that should be added to the list.
7. Click **Save**. If the added user/s belong to a ring group, all members of the ring group must be added to the Users of the park location.
8. An Alert window appears as a reminder to set up the User's Presence. Click **OK**.
9. Set up Presence Appearance on the online account.

The screenshot illustrates the steps to add members to a Park Location in the RingCentral Admin Portal. The interface is divided into a sidebar on the left and a main content area on the right. The sidebar contains navigation options: Home, Users, **Phone System** (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The main content area shows the 'Groups > Park Locations' section. A search bar and a '+ New Park Location' button are at the top. Below, a table lists existing Park Locations, with 'Park Location 1' selected (highlighted with a red circle 4). The 'Park Location 1 (Ext. 1)' details are shown, including a 'Location Members' section (highlighted with a red circle 5). This section contains a search bar, filters for Department and Sites, and a table of users. The user 'Hank Hill' is selected (highlighted with a red circle 6). At the bottom, an 'Alert' dialog box (highlighted with a red circle 8) appears, reminding the user to set up the User's Presence. The dialog has 'Cancel' and 'Save' buttons (highlighted with a red circle 7) and an 'OK' button (highlighted with a red circle 8).

Setting up presence appearance

1. Click the **Users** tab from the **Admin Portal**.
2. Click the name of the user that was added to the park location.
3. Select **Phones & Numbers**.
4. Select **Phones**.
5. Select **Presence**.
6. Click **Select a User**.
7. Select the **Park Location extension** from the list.
8. Click **Done**.

Call monitoring groups

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

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

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

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

Polycom	<ul style="list-style-type: none">• Polycom IP650• Polycom VVX 310• Polycom VVX400• Polycom VVX410• Polycom VVX411• Polycom VVX500• Polycom VVX501• Polycom VVX600• Polycom VVX601• Polycom VVX150• Polycom VVX250• Polycom VVX350• Polycom VVX450• Polycom CCX 400• Polycom CCX 500• Polycom CCX 600• Polycom CCX 700
Cisco	<ul style="list-style-type: none">• Cisco SPA525G• Cisco CP8851• Cisco SPA504G• Cisco SPA509G• Cisco CP7841• Cisco 7841• Cisco 8861

Adding and configuring a call monitoring group

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Monitoring**.
4. Select **New Call Monitoring**.
5. Enter a **Group Name**.
6. Click **Next**.
7. Select the users that can monitor this group.
8. Click **Next**.
9. Select the users that can be monitored by this group.
10. Click **Save**.

Note: The users who will be monitoring (for example, supervisors) can add the users who are monitored (for example, agents) in their desk phone Presence appearance. The desk phone may need to be rebooted after these settings have been changed.

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info
Phone Numbers
Auto-Receptionist
Groups
Call Queues
Paging Only
Shared Lines
Park Locations
Call Monitoring
Others
Phones & Devices
Emergency Calling

Groups » **Call Monitoring**

A group that defines a set of permissions allowing users to monitor the calls of other users. [Learn More](#)

Search [+ New Call Monitoring](#)

Call Monitoring Group

1 Define Group Name 2 Select users that can monitor 3 Select users that can be monitored

Group Name
Call Monitoring Group 1

Cancel Next

Call Monitoring Group

✓ Define Group Name 2 Select users that can monitor 3 Select users that can be monitored

Select users that can monitor this group.

Search Sites

Show All | Show Selected (1)

Name	Ext.	Type	Site
<input checked="" type="checkbox"/> Hank Hill	11101	User	Company
<input type="checkbox"/> Joe Hall	11102	User	Company

Total: 2 Show 10 < 1 >

Back Next

Call Monitoring Group

✓ Define Group Name ✓ Select users that can monitor 3 Select users that can be monitored

Select users that can be monitored.

Search Sites

Show All | Show Selected (1)

Name	Ext.	Type	Site
<input type="checkbox"/> Hank Hill	11101	User	Company
<input checked="" type="checkbox"/> Joe Hall	11102	User	Company

Total: 2 Show 10 < 1 >

Back Save

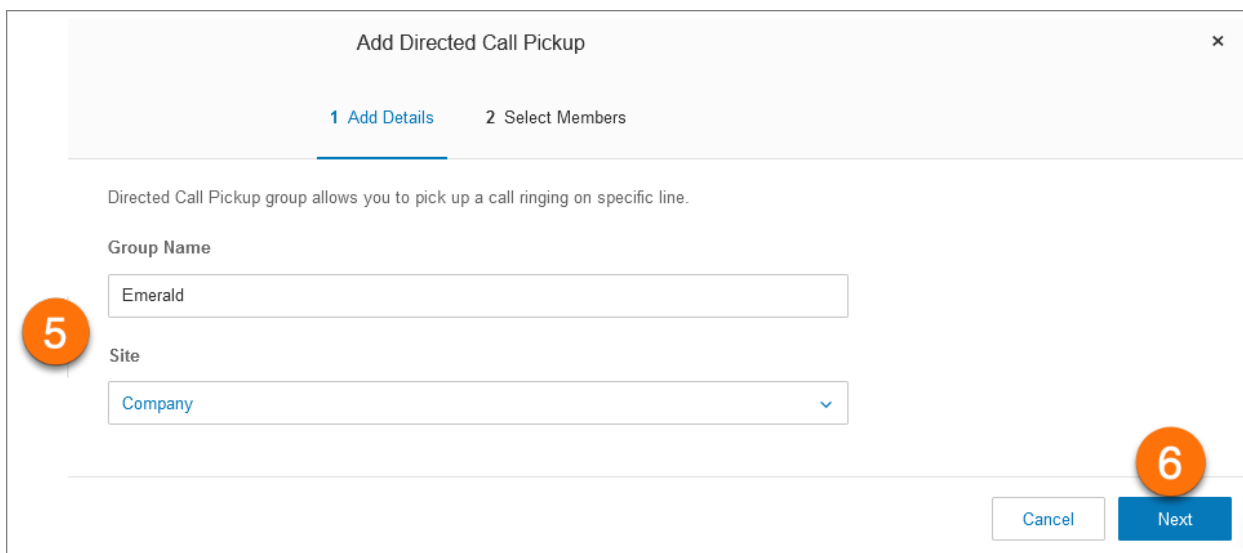
Directed call pickup

Administrators can set and manage call pickup permissions for multiple users together. Pickup group Users can answer each other's calls from their own device by dialing *58 followed by the ringing extension's number. Administrators can set and manage call pickup permissions for multiple users at once.

Adding a call pickup group

To add a new call pickup group:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Pickup**.
4. Click **+ New Directed Call Pickup**. The **Add Directed Call Pickup** window will appear.
5. In the **Add Details** tab, enter the group name and choose a site from the drop down menu.
6. Click **Next**.



The screenshot shows the 'Add Directed Call Pickup' window with two tabs: '1 Add Details' (active) and '2 Select Members'. Below the tabs, a description states: 'Directed Call Pickup group allows you to pick up a call ringing on specific line.' The 'Group Name' field contains 'Emerald'. The 'Site' dropdown menu is open, showing 'Company' as the selected option. A large orange circle with the number '5' is positioned to the left of the 'Site' dropdown. At the bottom right, there are 'Cancel' and 'Next' buttons. A large orange circle with the number '6' is positioned above the 'Next' button.

Choose group members in the **Select Members** tab, where you can filter by using the **Search** field and by dropdown lists for **Department** and **Site**.

7. From the Name list, check the box to the left of any entry to include them in the group.
8. Click **Save**.

[Add Details](#) [2 Select Members](#)

Directed call pickup doesn't require a physical phone key. Calls can be picked up by dialing *58 followed by the ringing extension number.

[Show All](#) | [Show Selected \(3\)](#)

<input type="checkbox"/>	Name	Ext.	Department	Site
<input type="checkbox"/>	Dave Brown	11101	Coporate	Company
<input checked="" type="checkbox"/>	David Black	12103		Something New
<input checked="" type="checkbox"/>	Genevieve Rhyder	11104		Company
<input checked="" type="checkbox"/>	Harmony Jeffries	11106	Economics	Company

Total: 8

Show < >

Message-only extensions

Create an extension dedicated to receiving messages. All calls routed to this extension are automatically directed to the extension's voicemail box.

Adding a message-only extension

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Message-Only Extensions**.
4. Click **New Message-Only Extension**. The **Add Message-Only Extension** window appears.
5. Enter the **Extension Name**, **Short Extension Number**, and **Email**.
6. Click **Save**.

The screenshot illustrates the process of adding a message-only extension in the RingCentral Admin Portal. The interface includes a top navigation bar with tabs like Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Phone System' tab is selected, and the 'Admin Portal' dropdown is visible. On the left, a sidebar menu shows 'Groups' expanded, with 'Message-Only Extensions' selected. The main content area displays the 'Message-Only Extensions' page, which includes a search bar, a 'Sites' dropdown, and a '+ New Message-Only Extension' button. A table lists existing extensions, with one entry 'Message-only Ext' shown. A modal window titled 'Add Message-Only Extension' is open, containing fields for 'Site' (a dropdown), 'Extension Name', 'Short Extension Number', 'Full Extension Number' (with a '-' placeholder), and 'Email'. At the bottom of the modal are 'Cancel' and 'Save' buttons. The page also shows a 'Total: 1' count and a 'Show: 25' dropdown.

1. Click the **Phone System** tab from the **Admin Portal**.

2. Click **Groups**.

3. Click **Message-Only Extensions**.

4. Click **New Message-Only Extension**. The **Add Message-Only Extension** window appears.

5. Enter the **Extension Name**, **Short Extension Number**, and **Email**.

6. Click **Save**.

Configuring a message-only extension

After you've created a Message-Only Extension, configure the Extension Details, Direct Numbers, and Messages & Notifications.

Managing extension details

Edit your extension number, name, or delete your extension.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Message-Only Extensions**.
4. Select an existing message-only extension.
5. Click **Message-Only Extension Details** to edit the following:
 - **Short Extension Number**
 - **Record Extension Name**
 - **Extension Name**
 - **Record Extension Name**
 - **Company Name**
 - **Contact Phone**
 - **Email**
 - **Status**
 - **Delete Group**
6. Click **Save**.
7. Click **Settings** to edit the following:
 - **Regional Settings**
 - **Site**
 - **Confirmation Message**

1

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

2

3

4

5

6

7

Groups » Message-Only Extensions

Message-Only Extension allows you to route all calls received to its voicemail box. [Learn More](#)

Search Sites + New Message-Only Extension

Change Site

Status	Name
<input type="checkbox"/>	Message-only Ext

Message-only Ext (Ext. 11011)

Message-Only Extension Details

General Settings

Short Extension Number
11
Full Extension Number: 11011

Record Extension Name
Message-only Ext (Default)
Edit

Extension Name
Message-only Ext

Company Name

Contact Phone

Email
stricklandpropane135lososgato@gmail

Status
Not Activated
Send Invite

Delete Group Cancel Save

Message-only Ext (Ext. 11011)

Message-Only Extension Details

General Settings

Regional Settings
GMT-08:00, English (U.S.)
Edit

Site
Company
Edit

Confirmation Message
3 seconds
Edit

Recording an extension name

You can use this option to ensure the extension name is pronounced correctly by the system operator. You can spell out the name the way it sounds to help the operator, or you can record the name in your own voice and use it for announcements instead.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Message-Only Extensions**.
4. Select an existing message-only extension.
5. Click **Message-Only Extension Details**.
6. Click **Edit** under **Record Extension Name**.
7. Select an option under **Record by**.
 - a. *RingCentral text-to-speech*
 - b. *Record extension name:*
 - **Phone:** Choose a phone number from the dropdown list if you have saved numbers or select *Enter a new number* and type a phone number in the field for **Call me at**. Click the **Call Now** button, and RingCentral will call you to record your extension name. Click **Save**.
 - **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 voicemail greeting. Click **Save**.
 - **Importing:** Click **Browse** and select the WAV or MP3 file you want to use. Click **Open**. Click **Save**.
8. Edit the **Greeting Name** (optional).
9. Click **Save**.

1 Home Users **Phone System** Meetings Reports Billing More Admin Portal AG

2 Company Info Phone Numbers Auto-Receptionist **Groups** Call Queues Paging Only Shared Lines Park Locations Call Monitoring Call Pickup **Message-Only Extensions** Announcement-Only Extensions Phones & Devices Emergency Calling

3 **4** **5** **6** **7** **8** **9**

Groups » **Message-Only Extensions**

Message-Only Extension allows you to route all calls received to its voicemail box. [Learn More](#)

Search Sites + New Message-Only Extension

Change Site

Status	Name
<input type="checkbox"/>	Message-only Ext

Message-only Ext (Ext. 11011)

Message-Only Extension Details

General Settings

Short Extension Number: 11 Record Extension Name: Message-only Ext (Default) **Edit**

Full Extension Number: 11011

Extension Name: Message-only Ext

Company Name: Contact Phone:

Email: stricklandpropane135losgatosrd@gmail.com Status: Not Activated **Send Invite**

Record Extension Name

Record by: RingCentral text-to-speech

✓ RingCentral text-to-speech

Record extension name

Greeting Name: Message-only Ext

Save

Adding a direct number

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Message-Only Extensions**.
4. Select an existing message-only extension.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**. The **Add Direct Number** window will appear.
7. Select a **Location** and follow these instructions for the **Number Type** you choose:
 - **Local Number**: Provide the **State** and **Area Code**. Select one or more numbers and click **Add Numbers**.
 - **Toll-Free Number**: Select a toll-free prefix. Note that there is a \$30 one-time set up fee per number if you select 800 as your toll-free prefix. Select one or more numbers and click **Add Numbers**.
 - **Vanity Number**: Enter a number that helps customers remember your business phone number. Click **Search** to check availability. Select a number and click **Add Numbers**.
8. Click **Next**.
9. Review the charges (if any) and click the acknowledge box.
10. Click **Next**.

The screenshot illustrates the process of adding a direct number in the RingCentral Admin Portal. The main interface shows the 'Phone System' tab, 'Groups' > 'Message-Only Extensions', and the 'Direct Numbers' section. Two inset windows show the 'Add Direct Number' process: selecting numbers and reviewing charges.

Step 7: Add Direct Number (Select Numbers)

Location: **Domestic - US/Canada** | Number Type: **Local Number**

Number Information

License: Additional Local Numbers - Domestic
Availability: 2
If the quantity of numbers exceeds the available amount, you will be charged \$50.00 per year each.

State: **Alabama** | Area Code: **205 - Alabama**

Numbers Available in your Number Inventory (0) | 0 Selected | Clear Selection

Numbers Available from RingCentral | 1 Selected | Clear Selection

Show: 20 | 50 | 100 | Select: View 20 | Change Set

☒ (205) 716-1558
☐ (205) 716-1559
☐ (205) 716-1560
☐ (205) 716-1561
☐ (205) 716-1562
☐ (205) 716-1563
☐ (205) 716-1564
☐ (205) 716-1565
☐ (205) 716-1566
☐ (205) 716-1567
☐ (205) 716-1568
☐ (205) 716-1569
☐ (205) 716-1570
☐ (205) 716-1571
☐ (205) 716-1572
☐ (205) 716-1573
☐ (205) 716-1574
☐ (205) 716-1575
☐ (205) 716-1576
☐ (205) 716-1577
☐ (205) 716-1578
☐ (205) 716-1579
☐ (205) 716-1580
☐ (205) 716-1581
☐ (205) 716-1582
☐ (205) 716-1583
☐ (205) 716-1584
☐ (205) 716-1585
☐ (205) 716-1586
☐ (205) 716-1587
☐ (205) 716-1588
☐ (205) 716-1589
☐ (205) 716-1590
☐ (205) 716-1591
☐ (205) 716-1592
☐ (205) 716-1593
☐ (205) 716-1594
☐ (205) 716-1595
☐ (205) 716-1596
☐ (205) 716-1597
☐ (205) 716-1598
☐ (205) 716-1599
☐ (205) 716-1600

[Add Numbers](#) | Selected quantity of 1 exceeds the available numbers by 1. A charge of \$50.00 each per year will be incurred. Subtotal: \$50.00 | [What's the charge for?](#)

Step 9: Add Direct Number (Charges and Credits)

Period	Charges and credits	Unit Price	Quantity	Amount
02/28/2021 - 02/27/2022	Additional Local Number (new purchase)	\$50.00	1	\$50.00
02/28/2021 - 02/27/2022	Additional Local Number - Prorate Adjustment	(\$1.64)	1	(\$1.64)
Charges after Discounts and Prorates:				\$50.24
Taxes				Amount
State and local taxes and fees				\$1.58
FED. TAX				\$8.72
Taxes after Discounts and Prorates:				\$10.30
Total charges after discounts and prorates:				\$50.54
Total Taxes and Fees:				\$10.30
Sub-total:				\$60.84
Total Charged to Credit Card:				\$60.84

All charges will appear as "RingCentral, Inc." on your credit card statement and will be charged to the credit card on file for this account. Your credit card information is encrypted and processed on a secure server.

I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of \$60.84 to be charged to my credit card ending in ****1111. I further authorize the monthly recurring charges of \$60.84 beginning on 02/28/2022 and continuing until canceled, which is in addition to my regular charges.

* Prices do not include taxes, fees or discounts.

Designating a message recipient

Choose an extension to receive and save messages.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Message-Only Extensions**.
4. Select an existing message-only extension.
5. Click **Messages & Notifications**.
6. Click **Select Extension** under **Message Recipient**. The **Select Message Recipient** window will appear.
7. Select the user.
8. Click **Done**.
9. Click **Save**.

The screenshot illustrates the process of designating a message recipient for a message-only extension in the RingCentral Admin Portal. The interface is divided into a left sidebar, a main content area, and a bottom modal window.

Step 1: The **Phone System** tab is selected in the top navigation bar.

Step 2: The **Groups** menu item is selected in the left sidebar.

Step 3: The **Message-Only Extensions** menu item is selected in the left sidebar.

Step 4: A message-only extension, **Message-only Ext**, is selected from the list.

Step 5: The **Messages & Notifications** tab is selected for the chosen extension.

Step 6: The **Select Extension** button is clicked under the **Message Recipient** section.

Step 7: The **Select Message Recipient** modal window is displayed, showing a list of extensions. The user **Dulcinea Dunn** is selected.

Step 8: The **Done** button is clicked in the modal window.

Step 9: The **Save** button is clicked in the main configuration window.

Table Data (from Step 7):

Select	Name	Site	Ext.	Type	Department
<input type="radio"/>	Buck Strick	Company	11101	User	
<input checked="" type="radio"/>	Dulcinea Dunn	Company	11103	User	
<input type="radio"/>	Group 1	Company	11006	Shared Line	
<input type="radio"/>	Joe Hall	Company	11102	User	
<input type="radio"/>	Matt Smith	Company	11104	User	

Setting a voicemail greeting

Set the voicemail greeting you would like to use for your Message-Only Extension.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Message-Only Extensions**.
4. Select an existing message-only extension.
5. Click **Messages & Notifications**.
6. Click **Edit** below **Voicemail Greeting**. The **Voicemail Greeting** window will appear.
7. Choose your preferred type of greeting under **Set Greeting**:
 - a. *Default*: Select *Default* to set the system-default voicemail greeting. Select the language to display the default greeting text under **View In**. Your selection here affects only your current view of the greeting text, it will not change the greetings language setting.
 - b. *Custom*: Select *Custom* and select how you'd like to set your custom recording:
 - **Phone**: Choose a phone number from the dropdown list if you have saved numbers or select *Enter a new number* and type a phone number in the field for **Call me at**. Click the **Call Now** button, and RingCentral will call you to record your extension name.
 - **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 voicemail greeting. Click the up arrow to upload your recorded message.
 - **Importing**: Click **Browse** and select the WAV or MP3 file you want to use. Click **Open**.
8. Click **Done**.
9. Click **Save**.

1 Admin Portal

Home Users **Phone System** Meetings Reports Billing More

2 Groups

3 Message-Only Extensions

Groups » **Message-Only Extensions**

Message-Only Extension allows you to route all calls received to its voicemail box. [Learn More](#)

Search [] Sites [] + New Message-Only Extension []

Change Site

Status	Name
<input type="checkbox"/>	Message-only Ext

4

5 Message-only Ext (Ext. 11011)

Message-Only Extension Details

Direct Numbers

Messages & Notifications

General Settings

Vicemail Greeting: Default [] [] 00:00 / 00:00 []

Message Recipient: ☐ This Extension (Ext. 11011) ☒ Specific Extension (Ext. 11102, Joe Hall) []

6 Edit **9** Select Extension Cancel Save

7 Voicemail Greeting

Set Greeting: Default []

View In: English (U.S.) []

"Your call has been forwarded to the voicemail for Message-only Ext. No one is available to take your call. At the tone, please record your message. When you've finished recording, you may hang up or press the # key for more options."

[] 00:00 / 00:00 [] **8**

Cancel Done

Setting voicemail-to-text

The voicemail-to-text transcription provides a text version of your voicemail that allows you to get the gist of the message. The voicemail transcription is delivered to your RingCentral mobile or desktop application or via email.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Message-Only Extensions**.
4. Select an existing message-only extension.
5. Click **Messages & Notifications**.
6. Click **Settings**.
7. Click the toggle switch on to enable or disable **Voicemail to Text**.

The screenshot displays the RingCentral Admin Portal interface with several steps highlighted by orange circles with numbers:

- Step 1:** The **Phone System** tab is selected in the top navigation bar.
- Step 2:** The **Groups** menu item is selected in the left sidebar.
- Step 3:** The **Message-Only Extensions** menu item is selected in the left sidebar.
- Step 4:** A message-only extension named **Message-only Ext** is selected in the list.
- Step 5:** The **Messages & Notifications** section is expanded on the right-hand details panel.
- Step 6:** The **Settings** tab is selected within the Messages & Notifications section.
- Step 7:** The **Voicemail to Text** toggle switch is turned **On**.

The interface includes a top navigation bar with links like Home, Users, Phone System, Meetings, Reports, Billing, and More. The left sidebar contains various system management options. The main content area shows the configuration for the selected message-only extension, including details, direct numbers, and the Messages & Notifications settings.

Setting notifications

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

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Message-Only Extensions**.
4. Select an existing message-only extension.
5. Click **Messages & Notifications**.
6. Click **Settings**.
7. Click **Edit** under **Notifications**. The **Notifications** window will appear. Set your notifications by checking the boxes and filling in email and phone numbers.
8. Click **Basic Settings > Advanced Settings** to see more detailed notification settings. Set your **Advanced Settings**. Here, you can customize your notifications for voicemail messages, received faxes, and received text messages. You can choose different email addresses and phone numbers for your notifications, and select options for email attachments.
9. Click **Save**.

1 Phone System

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

2 Groups

Company Info
Phone Numbers
Auto-Receptionist
Groups
Call Queues
Paging Only
Shared Lines
Park Locations
Call Monitoring
Call Pickup
Message-Only Extensions
Announcement-Only Extensions
Phones & Devices
Emergency Calling

Groups » **Message-Only Extensions**

Message-Only Extension allows you to route all calls received to its voicemail box. [Learn More](#)

Search Sites + New Message-Only Extension

Change Site

Status	Name
<input type="checkbox"/>	Message-only Ext

4 Message-only Ext

5 Message-Only Extension Details

Direct Numbers

Messages & Notifications

General Settings **6**

Notifications Edit **7**

Voicemail to Text On

8 Notifications

Basic Settings

	By Email	By SMS
Voicemail Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Received Faxes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Received Text Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Send Notifications to

Email
stricklandpropane135osgatosrd@gmail.com

Select Carrier Phone Number
Select Carrier + Add

My carrier is not listed

Cancel Save **9**

Announcement-only extensions

Create an extension that only plays an announcement for your callers. All callers routed to this extension will hear a recorded announcement, such as a holiday closure announcement.

Adding an announcement-only extension

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Announcement-Only Extensions**.
4. Click **New Announcement-Only Extension**. The **Add Announcement-Only Extension** window appears.
5. Enter the **Extension Name**, **Short Extension Number**, and **Email**.
6. Click **Save**.

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

- Top Navigation Bar:** Includes links for Home, Users, **Phone System** (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The Admin Portal dropdown and user profile are also visible.
- Left Sidebar:** Contains a list of navigation items. **Groups** (highlighted with a red circle 2) and **Announcement-Only Extensions** (highlighted with a red circle 3) are the relevant items for this task.
- Main Content Area:** Displays the 'Groups > Announcement-Only Extensions' page. It includes a search bar, a 'Sites' dropdown, and a '+ New Announcement-Only Extension' button (highlighted with a red circle 4). Below this is a table with columns for Status, Name, Site, Numbers, Ext., Msg., and Actions. A single entry, 'Announcement Only Extension', is listed with site 'Company' and extension number '11012'.
- Add Announcement-Only Extension Modal:** A dialog box (highlighted with a red circle 5) that appears when the '+ New' button is clicked. It contains the following fields:
 - Site:** A dropdown menu with 'Select Site' as the placeholder.
 - Extension Name:** A text input field.
 - Short Extension Number:** A text input field.
 - Full Extension Number:** A text input field with a placeholder '- '.
 - Email:** A text input field.
 At the bottom of the modal are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted with a red circle 6.

Editing announcement-only extension details

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Announcement-Only Extensions**.
4. Select an existing announcement-only extension.
5. Click **Announcement-Only Extension Details**.
6. Edit the info for the extension under **General**:
 - **Short Extension Number**
 - **Extension Name**
 - **Company Name**
 - **Contact Phone**
 - **Email**
 - **Status**
 - **Delete Group**
7. Click **Save**.
8. Click **Settings** to edit the following:
 - **Regional Settings**
 - **Site**
 - **Confirmation Message**

The screenshot displays the RingCentral Admin Portal interface for configuring 'Announcement-Only Extensions'. The top navigation bar includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The right side shows the Admin Portal dropdown and a user profile icon.

The left sidebar contains a list of navigation options: Company Info, Phone Numbers, Auto-Receptionist, Groups (highlighted with a red circle 2), Call Queues, Paging Only, Shared Lines, Park Locations, Call Monitoring, Call Pickup, Message-Only Extensions, Announcement-Only Extensions (highlighted with a red circle 3), Phones & Devices, and Emergency Calling.

The main content area is titled 'Groups » Announcement-Only Extensions'. It includes a description: 'Announcement-Only Extension allows you to play an announcement for your callers. [Learn More](#)'. Below this is a search bar and a 'Sites' dropdown menu. A '+ New Announcement-Only Extension' button is also present.

A table lists the extensions. The first entry is 'Announcement Only Extension (Ext. 11012)' (highlighted with a red circle 4). The table has columns for Status and Name.

The 'Announcement Only Extension (Ext. 11012)' modal is open, showing the 'Announcement-Only Extension Details' configuration. The modal has tabs for 'General' and 'Settings'. The 'General' tab is active, showing fields for Short Extension Number (12), Full Extension Number (11012), Extension Name (Announcement Only Extension), Company Name (Panes Company), Contact Phone, Email (stricklandpropane135@sgatosrd@gmail), and Status (Not Activated). A 'Send Invite' button is also visible. A 'Delete Group' button is at the bottom left. A 'Save' button is at the bottom right (highlighted with a red circle 7).

The 'Settings' tab is also shown, containing 'Regional Settings' (GMT-08:00, English (U.S.)) and 'Site' (Company). Both have 'Edit' buttons. The 'Confirmation Message' is set to '3 seconds' and also has an 'Edit' button (highlighted with a red circle 8).

Adding a direct number

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Announcement-Only Extensions**.
4. Select an existing announcement-only extension.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Select a **Location** and follow these instructions for the **Number Type** you choose:
 - **Local Number**: Provide the **State** and **Area Code**. Select one or more numbers and click **Add Numbers**.
 - **Toll-Free Number**: Select a toll-free prefix. Select one or more numbers and click **Add Numbers**. Note that there's a \$30 one-time setup fee for each number if you select 800 as your toll-free prefix.
 - **Vanity**: Enter a number that helps customers remember your business phone number. Click **Search** to check availability. Select a number and click **Add Numbers**. Note that there's a one-time setup fee for each vanity number you select.
8. Click **Next**.
9. Review the charges (if any) and click the acknowledge box.
10. Click **Next**.

The screenshot illustrates the process of adding a direct number in the RingCentral Admin Portal. The main interface shows the 'Announcement-Only Extensions' page. A sidebar on the left contains navigation links: Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Phone System' tab is selected, and the 'Groups' link is highlighted. The 'Announcement-Only Extensions' link is also highlighted. The main content area shows the 'Announcement-Only Extensions' page with a search bar and a '+ New Announcement-Only Extension' button. A modal window titled 'Add Direct Number' is open, showing a list of available numbers. The modal has two tabs: 'Select Numbers' and 'Confirm Order'. The 'Select Numbers' tab is active, showing a list of numbers with checkboxes. The 'Confirm Order' tab is also visible, showing a table of charges and credits. The table lists the period, charges and credits, unit price, quantity, and amount. The total amount is \$65.54. The modal also includes a section for 'Taxes' and a 'Total Charged to Credit Card' section. The modal is numbered 7 through 10, corresponding to the steps in the list above.

Charges and credits table:

Period	Charges and credits	Unit Price	Quantity	Amount
02/28/2021 - 03/27/2022	Additional Local Number (new purchase)	\$50.00	1	\$50.00
02/28/2021 - 03/28/2021	Additional Local Number - Prorate Adjustment	(\$1.94)	1	(\$1.94)
	Charges after Discounts and Promotes:			\$50.24
	Taxes			
	State and local taxes and fees			\$1.58
	FUSE Net®			\$0.72
	Taxes after Discounts and Promotes:			\$10.30
	Total charges after discounts and promotes:			\$60.24
	Total Taxes and Fees:			\$10.30
	Subtotal:			\$65.54
	Total Charged to Credit Card:			\$65.54

Setting an announcement

Customize a greeting for an announcement-only extension.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Announcement-Only Extensions**.
4. Select an existing announcement-only extension.
5. Click **Announcement**.
6. Click **Edit** under **Announcement Greeting**. The **Announcement Greeting** window will appear.
7. Choose your preferred type of announcement under **Set Greeting**:
 - a. *Default*: Select *Default* to use a system-default announcement. Select the language to display the default greeting text under **View In**. Your selection here affects only your current view of the greeting text, it will not change the greetings language setting.
 - b. *Custom*: Select *Custom* and select how you'd like to set your custom recording:
 - **Phone**: Choose a phone number from the dropdown list if you have saved numbers or select *Enter a new number* and type a phone number in the field for **Call me at**. Click the **Call Now** button, and RingCentral will call you to record your extension name.
 - **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 voicemail greeting. Click the up arrow to upload your recorded message.
 - **Importing**: Click **Browse** and select the WAV or MP3 file you want to use. Click **Open**.
8. Click **Done**.
9. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface for configuring 'Announcement-Only Extensions'. The interface includes a top navigation bar with links to Home, Users, Phone System, Meetings, Reports, Billing, and More. A sidebar on the left contains a list of navigation items: Company Info, Phone Numbers, Auto-Receptionist, Groups, Call Queues, Paging Only, Shared Lines, Park Locations, Call Monitoring, Call Pickup, Message-Only Extensions, Announcement-Only Extensions (highlighted), Phones & Devices, and Emergency Calling. The main content area is titled 'Groups » Announcement-Only Extensions' and includes a search bar, a 'Sites' dropdown, and a '+ New Announcement-Only Extension' button. A table lists existing extensions, with one entry 'Announcement Only Extension (Ext. 11012)' selected. To the right of the table, a detailed configuration panel for the selected extension is visible, showing sections for 'Announcement-Only Extension Details', 'Direct Numbers', and 'Announcement'. The 'Announcement' section includes a 'Default' greeting with a play button and a duration of 00:00 / 00:00. An 'Edit' button is located below the greeting. A modal window titled 'Announcement Greeting' is open, showing options to 'Set Greeting' (Default), 'View In' (English (U.S.)), and a text area for the greeting: 'No one is available to take your call. Thank you for calling. Goodbye!'. A play button and a duration of 00:00 / 00:00 are also present in the modal. The modal has 'Cancel' and 'Done' buttons. Numbered callouts (1-9) highlight specific UI elements: 1 points to the 'Phone System' tab; 2 points to the 'Groups' sidebar item; 3 points to the 'Announcement-Only Extensions' sidebar item; 4 points to the selected extension in the table; 5 points to the 'Announcement' section header; 6 points to the 'Edit' button; 7 points to the 'Announcement Greeting' modal title; 8 points to the 'Done' button in the modal; and 9 points to the 'Save' button in the main configuration panel.

1

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info
Phone Numbers
Auto-Receptionist
Groups
Call Queues
Paging Only
Shared Lines
Park Locations
Call Monitoring
Call Pickup
Message-Only Extensions
Announcement-Only Extensions
Phones & Devices
Emergency Calling

Groups » **Announcement-Only Extensions**

Announcement-Only Extension allows you to play an announcement for your callers. [Learn More](#)

Search Sites + New Announcement-Only Extension

Change Site

Status	Name
<input type="checkbox"/>	Announcement Only Extension (Ext. 11012)

Announcement Only Extension (Ext. 11012)

Announcement-Only Extension Details

Direct Numbers

Announcement

Announcement Greeting

Default

00:00 / 00:00

Default Greeting: "No one is available to take your call. Thank you for calling. Goodbye!"

Edit

Cancel Save

Announcement Greeting

Set Greeting

Default

View In

English (U.S.)

"No one is available to take your call. Thank you for calling. Goodbye!"

00:00 / 00:00

Cancel Done

Limited extensions

Create limited extensions for installation in a common area (meeting room or hotel room) for anyone who has the need to access basic inbound/outbound calling capabilities.

RingCentral provides the ability to separately purchase limited extensions as unassigned extensions, then later set up and activate those extensions by assigning them. Bulk purchases of up to 1,000 extensions are also supported.

A limited extension is an extension with limited features offered at a lower price. Unlike a user extension, a limited extension is not tied to a specific user. For more information, visit [RingCentral Limited Extension Overview](#).

Note: This feature is available on an on-demand basis. Contact RingCentral Support to discuss the requirements for enabling this feature for your account.

Adding a limited extension

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Click **New Limited Extension**.
5. Select a location and click **Next**.
6. Enter the quantity, and select the following:
 - a. **Cost Center**
 - b. **State**
 - c. **Area Code**
 - d. **Number Option**
 - e. **Site** (if you have a multi-site account)
 - f. Device for use as limited extension
7. Click **Add**.
8. Click **Next**.
9. Select your shipping preferences.
10. Click **Next**.
11. Confirm the order. An order summary is displayed.

1

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

2

Company Info

Company Address

Caller ID Name

Directory Assistance

Phone Numbers

Auto-Receptionist

3

Groups

Call Queues

Paging Only

Shared Lines

Park Locations

Call Monitoring

Call Pickup

Message-Only Extensions

Announcement-Only Extensions

4

Groups > Limited Extensions

Limited Extension gives admins the ability to purchase an extension with a limited feature set that is not tied to a user. [Learn More](#)

Search Status + New Limited Extension

5

Add Limited Extensions

1 Select Location 2 Add Limited Extensions 3 Add Shipping Info 4 Confirm

Select a Location

Domestic International

Cancel Next

6

7

Add Limited Extensions

✓ Select Location 2 Add Limited Extensions 3 Add Shipping Info 4 Confirm

Limited Extension - Domestic DigitalLine Basic available: 0

If the quantity of licenses added exceeds the available amount, you will be charged for the extra licenses to the selected Cost Center.

Qty	Cost Center	State	Area Code	Number Option	Device	
1	John Smith Company	Alabama	205 - Alabaster	New numbers	Existing Phone	Add

	Qty	Selected from Account	Additional Purchase	Subtotal
Limited Extension - Domestic Digit...	1	-	1 X \$14.99/month	\$14.99/month
Existing Phone - New	1	-	1 X \$0.00	-

Can't find the area code you're looking for?

Back Next

8

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

Once assigned, a limited extension can be unassigned or reassigned as needed.

Assigning a limited extension

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Click a limited extension with **Unassigned** status.
5. Fill out the required fields:
 - **Extension Number**
 - **Extension Name**
 - **Site**
 - **Emergency Address**
 - **Extension Email**
 - **International Calling**
6. Click **Save & Enable**. The status for the extension becomes **Assigned**.

1 Click the **Phone System** tab from the **Admin Portal**.

2 Click **Groups**.

3 Click **Limited Extensions**.

4 Select an existing **Limited Extension** with **Assigned** status.

5 Click **Limited Extension Details**.

6 Edit the following under **General**:

- **Extension Number**
- **Extension Name**
- **Record Extension Name**
- **Company Name**
- **Contact Phone**

Editing limited extension info

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Select an existing **Limited Extension** with **Assigned** status.
5. Click **Limited Extension Details**.
6. Edit the following under **General**:

- **Extension Number**
- **Extension Name**
- **Record Extension Name**
- **Company Name**
- **Contact Phone**

- **Email**
- **International Calling allowed**
- **Status**

7. Click **Save**.

8. Edit the following under **Settings**:

- **Regional Settings**
- **Template**
- **Site** (if you have a multi-site account)
- **Confirmation Message**

1

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

2

3

Company Info >

Phone Numbers >

Auto-Receptionist >

4 Groups >

Call Queues

Paging Only

Shared Lines

Park Locations

Call Monitoring

Call Pickup

Message-Only Extensions

Announcement-Only Extensions

5 Limited Extensions

6 Phones & Devices >

7 Emergency Calling >

Groups » **Limited Extensions**

Limited Extension gives admins the ability to purchase an extension with a limited feature set that is not tied to a user. [Learn More](#)

Search Status + New Limited Extension

Status	Name
4	test LE
5	Unassigned Limited Extension
6	Unassigned Limited Extension
	Unassigned Limited Extension
	Unassigned Limited Extension
	Unassigned Limited Extension

test LE (Ext. 5)

5 Limited Extension Details

6 General Settings

Extension Number

5

Extension Name

test LE

Company Name

Email

testLE@test.com

Status

Not Activated

Send Invite

Record Extension Name

test LE (Default)

Edit

Contact Phone

International Calling allowed

☐ Enable

7

Delete Group Cancel Save

8

General Settings

Regional Settings

GMT-08:00, English (U.S.)

Edit

Template

Apply

Confirmation Message

3 seconds

Edit

Phone & Numbers

Announcement & Hold Music

Outbound Caller ID

Recording an extension name

You can use this option to ensure the extension name is pronounced correctly by the system operator. You can spell out the name the way it sounds to help the operator, or you can record the name in your own voice and use it for announcements instead.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Select an existing limited extension.
5. Click **Limited Extension Details**.
6. Click **Edit** under **Record Extension Name**.
7. Select an option under **Record by**.
 - a. *RingCentral text-to-speech*
 - b. *Record extension name:*
 - **Phone:** Choose a phone number from the dropdown list if you have saved numbers or select *Enter a new number* and type a phone number in the field for **Call me at**. Click the **Call Now** button, and RingCentral will call you to record your extension name. Click **Save**.
 - **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 voicemail greeting. Click **Save**.
 - **Importing:** Click **Browse** and select the WAV or MP3 file you want to use. Click **Open**. Click **Save**.
8. Enter a **Greeting Name** (optional).
9. Click **Save**.

1

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

2

Company Info >
Phone Numbers >
Auto-Receptionist >
Groups >
Call Queues
Paging Only
Shared Lines
Park Locations
Call Monitoring
Call Pickup
Message-Only Extensions
Announcement-Only Extensions
3 **Limited Extensions**
Phones & Devices >
Emergency Calling >

Groups » **Limited Extensions**

Limited Extension gives admins the ability to purchase an extension with a limited feature set that is not tied to a user. [Learn More](#)

Search Status

+ New Limited Extension

Status	Name
4	test LE
5	Unassigned Limited Extension
	Unassigned Limited Extension
	Unassigned Limited Extension
	Unassigned Limited Extension
	Unassigned Limited Extension

test LE (Ext. 5)

5 ^ Limited Extension Details

General Settings

Extension Number

Record Extension Name 6 Edit

Extension Name

Company Name

Email

7

Record Extension Name

Record by 7

Greeting Name 8

9

Cancel Save

Adding a direct number

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Select an existing limited extension.
5. Click **Phones & Numbers**.
6. Click **Add Direct Number**. The **Add Direct Number** window will appear.
7. Select a Location and follow these instructions for the **Number Type** you choose:
 - *Local Number*: Provide the **State** and **Area Code**. Select a **Cost Center** if you have more than one. Otherwise, it will be preselected. Select one or more numbers and click **Add Numbers**.
 - *Toll-Free Number*: Select a toll-free prefix. Note that there is a \$30 one-time set up fee per number if you select 800 as your toll-free prefix. Select a **Cost Center** if you have more than one. Otherwise, it will be preselected. Select one or more numbers and click **Add Numbers**.
 - *Vanity Number*: Select a **Cost Center** if you have more than one. Otherwise, it will be preselected. Enter a number that helps customers remember your business phone number. Click **Search** to check availability. Select a number and click **Add Numbers**.
8. Click **Next**.
9. Follow the prompts to purchase your new number.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with a red circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. The 'Admin Portal' dropdown and a user profile icon 'AG' are on the right.

The left sidebar contains a menu with items: 'Company Info', 'Phone Numbers', 'Auto-Receptionist', 'Groups' (highlighted with a red circle 2), 'Call Queues', 'Paging Only', 'Shared Lines', 'Park Locations', 'Call Monitoring', 'Call Pickup', 'Message-Only Extensions', 'Announcement-Only Extensions', 'Limited Extensions' (highlighted with a red circle 3), 'Phones & Devices', and 'Emergency Calling'.

The main content area is titled 'Groups » Limited Extensions'. It includes a search bar, a 'Status' dropdown, and a '+ New Limited Extension' button. Below this is a table with columns 'Status' and 'Name'. The first row is 'test LE' (highlighted with a red circle 4), and the subsequent five rows are 'Unassigned Limited Extension' (highlighted with a red circle 5). To the right of the table is a panel for 'test LE (Ext. 5)' with sections for 'Limited Extension Details' and 'Phone & Numbers' (highlighted with a red circle 6). The 'Phone & Numbers' section has a '+ Add Direct Number' button (highlighted with a red circle 6).

An 'Add Direct Number' modal is open, showing a three-step process: '1 Select Numbers', '2 Confirm Order', and '3 Order Confirmation'. The 'Select Numbers' step is active. It contains dropdowns for 'Location' (Domestic - US/Canada), 'Number Type' (Local Number), and 'Cost Center' (John Smith Company). Below these are 'Number Information' details: 'License: Additional Local Numbers - Domestic', 'Availability: 0', and 'Cost Center: John Smith Company'. A note states: 'If the quantity of numbers exceeds the available amount, you will be charged \$4.99/month each.' There are dropdowns for 'State' and 'Area Code', and an 'Add Numbers' button. At the bottom right of the modal are 'Cancel' and 'Next' buttons (highlighted with a red circle 8).

Setting an announcement and enabling hold music

Customize a greeting for an announcement-only extension.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Select an existing limited extension.
5. Click **Announcement & Hold Music** and then click **Edit** under **Unavailable Greeting**. The **Unavailable Greeting** window will appear.
6. Choose your preferred type of announcement under **Set Greeting**:
 - a. *Default*: Select *Default* to use a system-default announcement. Select the language to display the default greeting text under **View In**. Your selection here affects only your current view of the greeting text, it will not change the greetings language setting. Click **Done**.
 - b. *Custom*: Select *Custom* and select how you'd like to set your custom recording:
 - **Phone**: Choose a phone number from the dropdown list if you have saved numbers or select *Enter a new number* and type a phone number in the field for **Call me at**. Click the **Call Now** button, and RingCentral will call you to record your extension name. Click **Done**.
 - **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 voicemail greeting. Click the up arrow to upload your recorded message. Click **Done**.
 - **Importing**: Click **Browse** and select the WAV or MP3 file you want to use. Click **Open**. Click **Done**.
7. Ensure there is a check for **Enable** under **Hold Music** if you want callers to hear music whenever you put the call on hold. If hold music is enabled, click **Edit** to set your hold music. The **Hold Music** window will appear.
8. Choose your preferred type of audio under **Set Audio**:
 - a. *Ring Tones*: Select *Ring Tones* if you want your callers to hear ring tones while the call is being connected.
 - b. *Music*: Select *Music* if you want callers to hear music. Select the type of music under **Select Music**.
 - c. *Custom*: Select *Custom* to upload your own audio file. Click **Browse** and select the WAV or MP3 file you want to use. Click **Open**.
9. Click **Done**.
10. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface for configuring Limited Extensions. The top navigation bar includes links for Home, Users, Phone System (highlighted with callout 1), Meetings, Reports, Billing, and More. The right side of the header shows the Admin Portal dropdown and a user profile icon (AG).

The left sidebar contains a list of navigation items: Company Info, Phone Numbers, Auto-Receptionist, Groups (highlighted with callout 2), Call Queues, Paging Only, Shared Lines, Park Locations, Call Monitoring, Call Pickup, Message-Only Extensions, Announcement-Only Extensions, Limited Extensions (highlighted with callout 3), Phones & Devices, and Emergency Calling.

The main content area is titled "Groups » Limited Extensions". It includes a description: "Limited Extension gives admins the ability to purchase an extension with a limited feature set that is not tied to a user. [Learn More](#)". Below this is a search bar and a status dropdown menu. A "+ New Limited Extension" button is also present.

A table lists existing Limited Extensions. The first entry, "test LE", is highlighted with callout 4. The other entries are "Unassigned Limited Extension".

The "test LE (Ext. 5)" configuration panel is shown on the right, with callout 5 pointing to the "Announcement & Hold Music" section. This panel includes sections for "Limited Extension Details", "Phone & Numbers", and "Announcement & Hold Music".

The "Announcement & Hold Music" section contains two sub-sections: "Unavailable Greeting" and "Hold Music". The "Unavailable Greeting" section has a "Default" greeting and a "Custom" greeting option. The "Hold Music" section has an "Enable" checkbox and a "Music" dropdown menu.

Two modal windows are shown. The "Unavailable Greeting" modal (callout 6) allows setting a greeting (Default, Custom) and a language (English (U.S.)). The "Hold Music" modal (callout 8) allows setting audio (Music, Acoustic) and selecting music (Acoustic). Both modals include a volume slider and a duration timer.

Callout 7 points to the "Hold Music" section in the main configuration panel. Callout 9 points to the "Select Music" dropdown in the "Hold Music" modal. Callout 10 points to the "Save" button in the "Announcement & Hold Music" section.

Setting outbound caller ID

Select the phone number you want to display as caller ID for outgoing calls.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Select an existing limited extension.
5. Click **Outbound Caller ID**.
6. Click **Edit** under **Existing Phone**. The **Select Number** window will appear.
7. Select the number you want to use as your outbound caller ID. Click **Done**.
8. Click **Edit** under **Alternate Caller ID** if you prefer to set this option. The **Select Number** window will appear.
9. Select the number you want to use as your alternate caller ID. Click **Done**.
10. Check the box for **Display my extension number for internal calls** if you want to display your extension as your caller ID when making internal calls.
11. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System (highlighted), Meetings, Reports, Billing, and More. The 'Admin Portal' dropdown and a user profile icon are also visible.

The left sidebar contains the following navigation items:

- Company Info
- Phone Numbers
- Auto-Receptionist
- Groups (highlighted)
- Call Queues
- Paging Only
- Shared Lines
- Park Locations
- Call Monitoring
- Call Pickup
- Message-Only Extensions
- Announcement-Only Extensions
- Limited Extensions (highlighted)
- Phones & Devices
- Emergency Calling

The main content area is titled 'Groups » Limited Extensions'. It includes a search bar, a status dropdown, and a '+ New Limited Extension' button. Below this is a table of extensions:

Status	Name
test LE	test LE
Unassigned Limited Extension	Unassigned Limited Extension
Unassigned Limited Extension	Unassigned Limited Extension
Unassigned Limited Extension	Unassigned Limited Extension
Unassigned Limited Extension	Unassigned Limited Extension
Unassigned Limited Extension	Unassigned Limited Extension

The right sidebar for the 'test LE (Ext. 5)' extension includes sections for 'Limited Extension Details', 'Phone & Numbers', 'Announcement & Hold Music', and 'Outbound Caller ID'. The 'Outbound Caller ID' section allows selecting a phone number to display as the caller ID for outgoing calls. It includes fields for 'Existing Phone' (857) 203-7722 - Main Company Number and 'Alternate Caller ID' (Not-specified). Buttons for 'Edit' are provided for both.

The 'Internal Calls' section includes a checkbox for 'Display my extension number for internal calls'.

Two modal windows are shown at the bottom:

Modal 7: Select Number
Select a phone number you want to display as your Caller ID number for Existing Phone.

Select	Number	Name	Type
<input type="radio"/>	Blocked		Others
<input type="radio"/>	+64 (3) 5680495		Company Number
<input type="radio"/>	+61 (2) 90531098		Company Number
<input type="radio"/>	+44 (20) 38808134		Company Number
<input type="radio"/>	(888) 219-5286	Front desk	Company Number
<input type="radio"/>	(888) 971-5468		Company Number
<input checked="" type="radio"/>	(857) 203-7722		Main Company Number
<input type="radio"/>	(855) 458-4457		Company Number
<input type="radio"/>	(844) 884-2263		Company Number

Modal 9: Select Number
Select a phone number you want to display as your Caller ID number for Alternate Caller ID.

Select	Number	Name	Type
<input checked="" type="radio"/>	Not-specified		Others
<input type="radio"/>	+64 (3) 5680495		Company Number
<input type="radio"/>	+61 (2) 90531098		Company Number
<input type="radio"/>	+44 (20) 38808134		Company Number
<input type="radio"/>	(857) 203-7722		Main Company Number
<input type="radio"/>	(475) 400-0618		Company Number
<input type="radio"/>	(256) 278-3366		Direct Number
<input type="radio"/>	(251) 328-4799		Company Number
<input type="radio"/>	(213) 291-2609		Company Number
<input type="radio"/>	(205) 419-8274		Company Number

Total: 10 Show: 25 < 1 > Cancel Done

Phones and Devices

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

Viewing and editing devices

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click on the following tabs to see the following:
 - a. **User Phones**
 - b. **Common Area Phones**
 - c. **Paging Devices**
 - d. **Shared Lines**
 - e. **Unassigned**
4. Click on a device to view and edit details.

The screenshot shows the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (annotated with a red circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. On the right, there is an 'Admin Portal' dropdown and a user profile icon labeled 'AG'.

On the left sidebar, the 'Phones & Devices' section is expanded (annotated with a red circle 2), and the 'User Phones' tab is selected (annotated with a red circle 3). The main content area is titled 'Phones & Devices » User Phones'.

Below the title, there is a search bar labeled 'Search User Phones' and a '+ Add Device' button. A table lists the user phones with columns: 'Stat...', 'Device', 'Site', 'Assigned', 'Phone Number', 'Serial No.', and 'Actions'.

The table contains two entries:

- Device: [Existing Phone](#), Site: Company, Assigned: Hank Hillios, Phone Number: (409) 200-2364, Serial No.: N/A.
- Device: [Joe Hall RingCentral Phone desktop app](#), Site: Company, Assigned: Joe Hall, Phone Number: (409) 209-0429, Serial No.: N/A.

 The first entry is annotated with a red circle 4.

Searching devices

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

Adding a device

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

Adding a user phone

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **User Phones**.
4. Click **Add Device**.
5. Select a **Location**.
 - Domestic
 - International
6. Click **Next**.
7. Select a user to assign the phone to.
8. Select a device to buy.

Note: You can only add devices for one country at a time. Repeat the process for different countries as needed.

Home Users **Phone System** Meetings Reports Billing More Admin Portal AG

Phones & Devices > **User Phones**

Search User Phones More + Add Device

2 **3** **1** **4** **5** **6**

1 Select Location **2** Select User **3** Select Devices **4** Select Numbers **5** Add Emergency Address **6** Add Shipping Info **7** Confirm

Select a Location

Domestic International

Cancel Next

7

2 Select User

Search Department: All Sites

Select	Name	Site	Ext.	Department
<input checked="" type="radio"/>	Hank Hillis	Company	11101	
<input type="radio"/>	Joe Hall	Company	11102	

Total: 2 < 1 > Back Next

8

3 Select Devices

Recently Bought Desktop Phones Other Phones

Avaya IX IP Phone J139
Price: \$114.00
Available in your site:
New - 0

Avaya IX IP Phone J139

A 2.8 inch diagonal color display IP phone with speakerphone, presence, Gigabit Ethernet and more. Includes power adapter.

- 2.8" diagonal color display
- Simplifies call control on the display using softkeys for everyday functions
- Share a single network connection with your phone and PC using the integrated Gigabit 2-port Ethernet switch
- Integrated Power over Ethernet (PoE) support (Class 1)

[Download Datasheet](#)

Additional Purchase
\$114.00

0 + Add

Devices Added: 1 Device (max 50)

Qty	Device Name	Device Option
1	Avaya IX IP Phone J139	New

Avaya IX IP Phone J139

Qty 1

Selected from account 0

Sub-total \$114.00

Order Summary

One-time Charges	Qty	Subtotal*
Phones	1	\$114.00

Recurring Charges - annual	Qty	Subtotal*
DigitalLine Unlimited	1 x \$419.88	\$419.88

Today's Estimated Total* **\$533.88**

*This price does not include calculations for prorated amounts, taxes, fees, and/or shipping.

Back Next

9. Assign an existing or a new number to the device and click **Next**.
10. Add an emergency address and click **Next**.
11. Select your shipping preferences and click **Next**.
12. Confirm your order by checking the acknowledgment box. Click **Next**.

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

Select Location

Select User

Select Devices

9 Select Numbers

Add Emergency Address

Add Shipping Info

Confirm

Please assign Existing or New numbers to selected devices.

Existing Number

New Number

State

Area Code

Colorado

720 - Denver

Assign to Selected

☐ Device

Phone Number

Number Type

Actions

☐ Avaya IX IP Phone J139

(720) 738-9907

New

Unassign Number

Total: 1

Back

Next

Select Location

Select User

Select Devices

Select Numbers

10 Add Emergency Address

Add Shipping Info

Confirm

Select Emergency Address

Customer Name

135 Los Gatos Road, Arlen, TX, 78104, United States

New

Office

Assign to Selected

☐ Device

Phone Number

Add Emergency Address

☐ Avaya IX IP Phone J139

(720) 738-9907

135 Los Gatos Road, Arlen, TX, 78104, United States

Total: 1

Back

Next

Select Location

Select User

Select Devices

Select Numbers

Add Emergency Address

11 Add Shipping Info

Confirm

Auto-assign the shipping address based on file address. Attention to and Ground Shipping will be the default.

Select Shipping Address

Attention to

Select Shipping Method

20 Davis Dr, Belmont, CA, 94002-3002, United States

Edit

New

Something New

Ground

Assign to Selected

Add Shipping Info to Items (0)

☐ Product Name

Phone Number

Qty

Actions

All items have shipping info added.

Shipping Groups

Add Shipping Info

Attention to

Shipping Method

Device Qty

Actions

20 Davis Dr, Belmont, CA, 94002-3002, United States

Something New

Ground

1

Remove

Back

Next

Select Location

Select User

Select Devices

Select Numbers

Add Emergency Address

Add Shipping Info

12 Confirm

Period	Charges and credits	Unit Price	Quantity	Amount
02/28/2020 - 02/27/2021	DigitalLine Unlimited (new purchase) - (720) 738-9907	\$419.88	1	\$419.88
02/28/2020 - 08/03/2020	DigitalLine Unlimited - Prorate Adjustment	(\$181.26)	1	(\$181.26)
(One time charge)	Avaya IX IP Phone J139	\$114.00	1	\$114.00
(One time charge)	Shipping & Handling Fees: US - Ground	\$13.20	1	\$13.20
Charges after Discounts and Prorates:				\$365.82
Taxes				Amount
State and local taxes and fees				\$17.66
Compliance and Administrative Cost Recovery Fee				\$48.00
Compliance and Administrative Cost Recovery Fee - Prorate Adjustment				(\$20.72)
911 Service Fee				\$12.00
911 Service Fee - Prorate Adjustment				(\$5.16)
FISC (VoIP)				\$11.32
Taxes after Discounts and Prorates:				\$63.08
Total charges after discounts and prorates:				\$365.82
Total Taxes and Fees:				\$63.08
Sub-total:				\$428.90
Total Charged to Credit Card:				\$428.90

All charges will appear as "RingCentral, Inc" on your credit card statement and will be charged to the credit card on file for this account. Your credit card information is encrypted and processed on a secure server.

☒ I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of \$428.90 to be charged to my credit card ending in [****]. I further authorize the monthly recurring charges of \$419.88* beginning on 02/28/2021 and continuing until canceled, which is in addition to my regular charges.

* Prices do not include taxes, fees or discounts

Back

Next

Adding a common area phone

A common area or hot desk phone provides hot desking, and enables any employee to log in to a shared phone that adopts the user's phone settings

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Common Area Phones**.
4. Click **Add Device**.
5. On the **Add Hot Desk Phones** window, enter the quantity and select a device. Click **Add**, and then **Next**.
6. Add an emergency address. Click **Next**.
7. Select your shipping preferences and click **Next**.
8. Confirm your order by checking the acknowledgment box. Click **Next**.

The following steps illustrate the process of adding a common area phone:

- Step 1:** Click the **Phone System** tab from the **Admin Portal**.
- Step 2:** Click **Phones & Devices**.
- Step 3:** Click **Common Area Phones**.
- Step 4:** Click **Add Device**.
- Step 5:** On the **Add Hot Desk Phones** window, enter the quantity and select a device. Click **Add**, and then **Next**.
- Step 6:** Add an emergency address. Click **Next**.
- Step 7:** Select your shipping preferences and click **Next**.
- Step 8:** Confirm your order by checking the acknowledgment box. Click **Next**.

The final confirmation window displays the following charges and totals:

Period	Charges and credits	Unit Price	Quantity	Amount
09/09/2020 - 09/07/2021	Common Phone (new purchase)	\$0.00	1	\$0.00
	One time charge	\$114.00	1	\$114.00
	Shipping & Handling Fee: US - Ground	\$13.20	1	\$13.20
	Charges after Discounts and Promotes:			\$127.20
	Taxes			
	State and local taxes and fees			\$11.34
	Compliance and Administrative Cost Recovery Fee			\$48.00
	Compliance and Administrative Cost Recovery Fee - Private Adjustment			(\$51.98)
	eS11 Service Fee			\$10.00
	eS11 Service Fee - Private Adjustment			(\$6.25)
	PULSE (P&P)			\$4.58
	Taxes after Discounts and Promotes:			\$50.29
	Total charges after discounts and promotes:			\$127.20
	Total Taxes and Fees:			\$50.29
	Sub-total:			\$177.49
	Total Charged to Credit Card:			\$177.49

All charges will appear as "RingCentral, Inc" on your credit card statement and will be charged to the credit card on file for this account. Your credit card information is encrypted and processed on a secure server.

I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of \$177.49 to be charged to my credit card ending in 71111.

Adding a paging device

A paging device is a wall-mounted speaker or amplifier that enables overhead paging. Follow the steps below to add a paging device:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Paging Devices**.
4. Click **Add Device**.
5. Enter a name for the paging device.
6. Click **Next**.
7. View the provisioning information for the device.
8. Click **Done** to add the paging device to your system.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, **Phone System** (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The left sidebar contains a list of navigation items: Company Info, Phone Numbers, Auto-Receptionist, Groups, **Phones & Devices** (highlighted with a red circle 2), User Phones, Common Area Phones, **Paging Devices** (highlighted with a red circle 3), Shared Lines, Unassigned, and Emergency Calling. The main content area displays the 'Phones & Devices > Paging Devices' section. It includes a search bar, a 'Status' dropdown, and a '+ Add Device' button (highlighted with a red circle 4). Below this is a modal window titled 'Add Paging Device' with two tabs: '1 Device Nickname' and '2 Provisioning Info'. The '1 Device Nickname' tab is active, showing a list of supported paging devices and a text input field for 'Paging Device Nickname' (highlighted with a red circle 5) containing 'Paging Device 1'. At the bottom of this modal are 'Cancel' and 'Next' buttons (highlighted with a red circle 6). The '2 Provisioning Info' tab is also shown, displaying provisioning information for CyberData paging devices, including three steps (Step 1: Open a web browser session, Step 2: Navigate to the Networking page, Step 3: Navigate to the SIP Configuration page) and a table of configuration fields and values. At the bottom of this modal is a 'Done' button (highlighted with a red circle 8).

1 Phone System

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info

Phone Numbers

Auto-Receptionist

Groups

2 Phones & Devices

User Phones

Common Area Phones

3 Paging Devices

Shared Lines

Unassigned

Emergency Calling

Phones & Devices > **Paging Devices**

Search Paging Devices Status

4 + Add Device

Add Paging Device

1 Device Nickname 2 Provisioning Info

The following paging devices are supported by RingCentral:

- CyberData SIP-enabled IP V2 Paging Speaker
- CyberData SIP-enabled IP V2 Paging Amplifier

Paging Device Nickname

5 Paging Device 1

Cancel **6** Next

Add Paging Device

7 Device Nickname 2 Provisioning Info

Provisioning information for CyberData paging devices

CyberData paging devices need to be programmed with the information given below to make them fully functional when assigned to paging group.

Step 1
Open a web browser session to the CyberData device. Please consult the vendor documentation for details on how to determine the IP address of your device and how to enter the relevant login credentials.

Step 2
Navigate to the Networking page and confirm that the device is configured for DHCP operation.

Step 3
Navigate to the SIP Configuration page and enter the following settings in the appropriate fields and Click "Save". The device may reboot.

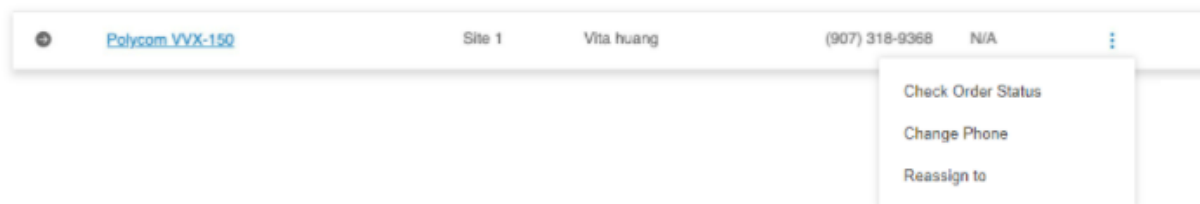
Field	Value
SIP Domain	sip.ringcentral.com
Remote SIP port	5060
Local SIP port	5060
Outbound Proxy	sip10.ringcentral.com
Outbound Proxy Port	5090
User Name	14092402563*803932523012
Authorization ID	803932523012
Password	pt6Ez

8 Done

Changing a phone

To change the phone of a user:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Locate the phone that you want to replace.
4. Click **Change Phone** from the more menu.



5. Select from the following options:
 - a. *Order a new phone from RingCentral:* We will ship you a new desktop IP desk phone if you select this option. These phones are pre-configured and should be automatically provisioned once connected to the internet.
 - b. *Existing RingCentral phone:* Select this option if you already have a desktop IP phone purchased from RingCentral but not currently in use. You can also swap phones with another user. A reboot is needed if you exchange phones with another user. Provisioning is required if you select a phone not presently in use. For more information, visit [Intro to deskphones provisioning](#).
 - c. *Phone not purchased from RingCentral:* Select this option if you own a SIP phone not purchased from RingCentral. Provisioning is required after assigning these phones to a user. For more information, visit [Intro to deskphones provisioning](#).
 - d. *RingCentral Phone app:* Select this option if you prefer to use RingCentral's desktop application for taking your calls. You can download the RingCentral app from the [RingCentral Downloads page](#).

Reassigning a phone

To reassign a phone to another user:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Locate the phone that you want to replace.
4. Click **Reassign to** from the more menu.
5. Select the user where you want to reassign the phone, then click **Next**.
6. You will be prompted with a warning message, click **Yes** to proceed.

Viewing shared lines

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Shared Lines**. The group assigned to a particular **Shared Line** and the **Phones Assigned** to that shared line are listed.
4. Filter numbers by search term or device.
5. The **Shared Line** and **Phones Assigned** are shown here. If you have made any changes, click **Apply**.

Home Users **Phone System** Meetings Reports Billing More

Admin Portal AG

Company Info
Phone Numbers
Auto-Receptionist
Groups
Phones & Devices
User Phones
Common Area Phones
Paging Devices
Shared Lines
Unassigned
Emergency Calling

Phones & Devices >> **Shared Lines**

Search Shared Lines More

Shared Line	Phones Assigned	Site	Lines	Ext.
Group 1	Avaya IX IP Phone J139	Company	1	11006

Adding an unassigned phone

An unassigned phone is an IP phone in your account that is not yet activated or assigned to a user. Use the following steps:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Unassigned**.
4. Click **Add Device**.
5. Select a **Location**.
 - a. Domestic
 - b. International
6. Click **Next**.
7. Select a device.
8. Click **Next**.

1 Home Users **Phone System** Meetings Reports Billing More Admin Portal AG

2 Company Info Phone Numbers Auto-Receptionist Groups **Phones & Devices** User Phones Common Area Phones Paging Devices Shared Lines **Unassigned** Emergency Calling

3 Phones & Devices » **Unassigned**

4 Search Unassigned More + Add Device

5 Buy Unassigned Phone

1 Select Location 2 Select Devices 3 Sites 4 Add Shipping Info 5 Confirm

Select a Location

☒ Domestic ☐ International

6 Cancel Next

7 Buy Unassigned Phone

✓ Select Location 2 Select Devices 3 Sites 4 Add Shipping Info 5 Confirm

Select Devices

Recently Bought Desktop Phones

Avaya IX IP Phone J139 Price: \$114.00

Avaya IX IP Phone J139

A 2.8 inch diagonal color display IP phone with speakerphone, presence, Gigabit Ethernet and more. Includes power adapter.

- 2.8" diagonal color display
- Simplifies call control on the display using softkeys for everyday functions
- Share a single network connection with your phone and PC using the integrated Gigabit 2-port Ethernet switch
- Integrated Power over Ethernet (PoE) support (Class 1)

[Download Datasheet](#)

\$114.00 - 0 + Add

Devices Added: 1 Device

Qty	Device Name	Device Option
1	Avaya IX IP Phone J139	New

Avaya IX IP Phone J139

Qty 1

Selected from account 0

Sub-total \$114.00

Order Summary

One-time Charges	Qty	Subtotal*
Phones	1	\$114.00

Today's Estimated Total* \$114.00

*This price does not include calculations for prorated amounts, taxes, fees, and/or shipping.

8 Back Next

9. Select your shipping preferences and click **Next**.
10. Confirm your order by checking the acknowledgment box and click **Next**.

Buy Unassigned Phone

✓ Select Location

✓ Select Devices

3 Sites

4 Add Shipping Info

5 Confirm

Select Site

Company

Assign to Selected

Assign Site to Items (0)

Product Name	Site	Qty	Actions
All items have Sites assigned			

Assigned Sites (1)

Product Name	Site	Qty	Actions
Avaya IX IP Phone J139 New - United States	Company	1	Unassign

Back

Next

Buy Unassigned Phone

✓ Select Location

✓ Select Devices

✓ Sites

4 Add Shipping Info

5 Confirm

Auto Assign

Select Shipping Address

20 Davis Dr, Belmont, CA, 94002-3002, United States

Edit

New

Attention to

Something New

Select Shipping Method

Ground

Assign to Selected

Add Shipping Info to Items (0)

Product Name	Qty	Actions
All items have shipping info added.		

Shipping Groups

Add Shipping Info	Attention to	Shipping Method	Device Qty	Actions
20 Davis Dr, Belmont, CA, 94002-3002, United States	Something New	Ground	1	Remove

Back

Next

Buy Unassigned Phone

✓ Select Location

✓ Select Devices

✓ Sites

✓ Add Shipping Info

11 Confirm

Period	Charges and credits	Unit Price	Quantity	Amount
(One time charge)	Avaya IX IP Phone J139	\$114.00	1	\$114.00
(One time charge)	Shipping & Handling Fees: US - Ground	\$13.20	1	\$13.20
Charges after Discounts and Prorates:				\$127.20
Taxes				Amount
> State and local taxes and fees				\$11.12
Taxes after Discounts and Prorates:				\$11.12
Total charges after discounts and prorates:				\$127.20
Total Taxes and Fees:				\$11.12
Sub-total:				\$138.32
Total Charged to Credit Card:				\$138.32

All charges will appear as "RingCentral, Inc" on your credit card statement and will be charged to the credit card on file for this account. Your credit card information is encrypted and processed on a secure server.

☒ I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of \$138.32 to be charged to my credit card ending in ["1111"].

Back

Next

Enabling video calls

You can enable video on internal point-to-point calls in your RingCentral MVP account. Supported devices include the Polycom VVX 501/500 and 601/600 (supporting detachable cameras for video calling).

Phones with video support include video codecs with audio for all outbound calls. No new firmware is required for the Polycom phones to enable video.

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

To enable video:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**, then click **User Phones**.
3. Select a supported phone.
4. Check the box next to **Enable Video Calling**.
5. Click **Save**.

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

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

Common area phones

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

Types of hot desk phones

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

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

Phone support and setup

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

Using hot desking for limited extension

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

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

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

Note: This option is available for MVP Premium and Ultimate only.

Enabling a limited extension phone for hot desking

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

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

Note: On the **Phone & Devices** page, the device type is now identified as **Limited Ext + Hot Desk**.

A login softkey is provisioned on the device. Once a guest user is logged in, the device details page displays the guest user name.

Converting an unassigned phone to a hot desk phone

Converting an unassigned phone to a hot desk phone makes that phone only available for use in hot desking. No minutes are included for any type of calls.

To convert an unassigned phone to a hot desk phone:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Unassigned**. Select an unassigned phone.
4. Under Phone Details, select **Convert to Common Phone**.
5. Follow the instructions to complete the conversion.

Unassigning a hot desk phone

You can unassign a hot desk phone to remove it from hot desking use, and return it to the list of unassigned devices. To unassign a hot desk phone:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Common Area Phones**.
4. Select a hot desk phone.
5. Under Phone Details, select **Unassign Phone** The phone is returned to Unassigned phones.

Logging out a hot desk phone

You can log out the currently logged in user from the hot desk phone. To log out a hot desk phone:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Common Area Phones**.
4. Select one or more hot desk phones.
5. Click **Logout**.

The currently logged in users are logged out from the selected phones.

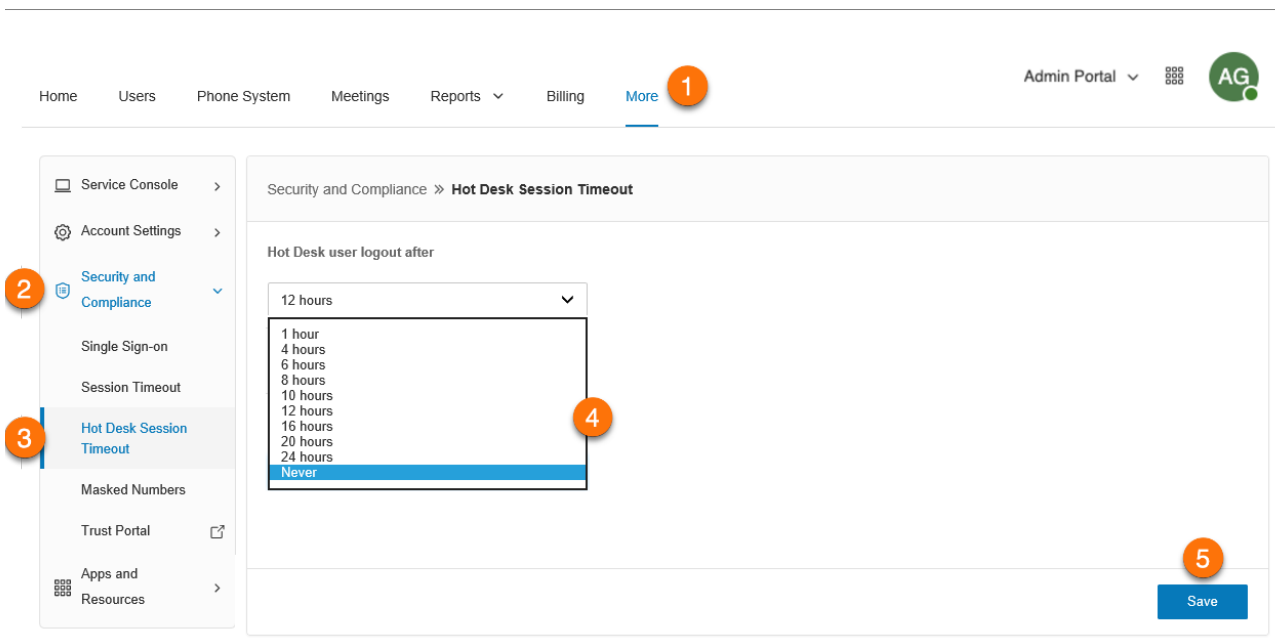
Setting the hot desking session timeout

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

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

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

1. Click the **More** tab from the **Admin Portal**.
2. Select **Security and Compliance**.
3. Select **Hot Desk Session Timeout**.
4. Select the duration from the list provided. To configure no timeouts, select the **Never** value.
5. Click **Save**.



The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More' (1). The 'More' tab is active. On the left sidebar, 'Security and Compliance' (2) is expanded, and 'Hot Desk Session Timeout' (3) is selected. The main content area is titled 'Security and Compliance » Hot Desk Session Timeout'. It features a section 'Hot Desk user logout after' with a dropdown menu (4) showing a list of options: 1 hour, 4 hours, 6 hours, 8 hours, 10 hours, 12 hours, 16 hours, 20 hours, 24 hours, and Never. The 'Never' option is highlighted. At the bottom right of the main content area, there is a 'Save' button (5).

Assisted provisioning

You can provision supported third-party devices with your service. Follow these steps:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **User Phones**.
4. Select the device that needs to be provisioned.
5. Click **Setup and Provision**.
6. Select your phone model. If you have selected:
 - **Avaya IP Phone:** Select the phone model, provide the phone's MAC Address and click **Next**. Proceed with the steps described in the wizard.
 - **Cisco/Linksys IP Devices:** Select the phone model from the menu. Provide the phone's IP address and click **Next**. Proceed with the steps described in the wizard.
 - **Polycom IP Phones:** Select the phone model from the menu. Provide the phone's MAC address and click **Next**. Proceed with the steps described in the wizard.
 - **Yealink IP Phone:** Select the phone model from the menu. Provide the phone's MAC address and click **Next**. Proceed with the steps described in the wizard.
 - **Other Phones:** Click **Select**. The next window displays the SIP Configuration or information needed for manual provisioning. Contact your manufacturer to know how to configure your phone using these configurations.

Setup & Provisioning

1 Select Device

2 Provisioning

3 Finish

In addition to the devices RingCentral sells pre-provisioned, RingCentral supports assisted provisioning for additional models. If your model is not available via assisted provisioning, RingCentral may have documented how to manually configure it. Please see the [office devices](#) page for more information.

Select your phone model to begin:


Avaya IP Phones

Cisco / Linksys IP Devices

Polycom IP Phones


Yealink IP Phones

Other Phones




Avaya B199

Select




Avaya J139

Select




Avaya J159

Select



Avaya J169

Select



Avaya J179

Select

Cancel

Automatic Location Updates

RingCentral MVP supports automatic location detection of certain devices and apps. This allows the most current location to be made available when a user dials 911 from these endpoints. Location detection is based on the application or device's interaction with network infrastructure elements with known locations, such as WiFi access points, IP address ranges, and/or Ethernet switch MAC addresses.

Note: This feature is currently in controlled release. Contact your RingCentral account manager to have this feature enabled for your account.

Current support covers the following endpoints:

- RingCentral app for desktop
- Polycom VVX x50 hard phones

Setting up emergency response location

Emergency Response locations (ERLs) represent the business locations where end users will be using their RingCentral service to make phone calls. The scope of an ERL depends on physical/geographic coverage needs. It should be defined to assist emergency responders in locating a 911 caller in a reasonable amount of time.

Typical examples include:

- SOHO customer : Single ERL referring to a single address.
 - SMB customer : Single ERL referring to a single address and possible a suite # in an office building.
 - Enterprise customer: Multiple ERLs referring to buildings on a campus, buildings in different geographic locations, possibly one ERL per floor in a multi-story office park.
1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Emergency Response Locations**.
 2. Toggle the **Enable Emergency Response Locations** switch on to enable the feature.
Important note: This enables the use of emergency response location for your account. This action is not reversible.
 3. Click **+ Add Emergency Response Location**.
 4. Enter a **Nickname** for the emergency response location.
 5. Click **Edit** under **Emergency Address**.
 6. Fill up the address information, then click **Done**.
 7. Click **Add**.

Note: You can also check **Private Location** to make the private emergency response location visible only to the selected owner.

Automatic location updates for RingCentral app for desktop

The location detection for the RingCentral app for desktop is based on the app's interaction with network infrastructure elements with known locations, such as [WiFi access points](#) and/or [IP address ranges](#).

The RingCentral app for desktop dynamically detects and reports changes in WiFi BSSID or IP address. It looks up the location and then updates the emergency location for the app.

Note that only the desktop version of the RingCentral app supports Nomadic 911. The web version doesn't support it.

Automatic location updates for compatible desk phones

Prerequisites:

- Polycom VVX x50 Desk Phone/s (VVX 150, 250, 350, or 450)
- Hardwired ethernet connection (WiFi connected Desk Phones are not supported)
- Managed ethernet switch/es (LLDP enabled)

RingCentral account admin defines a network map in the Admin Portal to specify on-net locations by IP Address ranges with corresponding physical address/es or Chassis IDs of ethernet switches with corresponding physical address/es. If location lookup is successful, the emergency address is automatically updated upon restart.

Note: If location lookup is unsuccessful, the phone is deemed as Off-Net and a notification is sent to the admin allowing them to deal with the situation. Phones in Off-Net status will enter a restricted calling state: No PSTN calling, only calls within account.

Before enabling the Automatic Location Updates, you must add your [ethernet switches to the Switch Map](#) or [add your IP addresses to the IP Address Range Map](#).

Enabling automatic location updates of compatible desk phones

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Status > Automatic Location Updates for Compatible Desk Phones**.
3. Turn on the toggle switch for **Enable Automatic Location Updates for Compatible Desk Phones**.
4. Tick the checkbox for **Accept legal disclaimers**, then click **Confirm**.

Setting up the network infrastructure with known locations

Location detection is based on the application or device's interaction with network infrastructure elements with known locations, such as WiFi access points, IP address ranges, and/or Ethernet switch MAC addresses.

Adding wireless access point to the wireless access point map

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Wireless Access Point Map**.
3. Click **+ Access Point**.
4. Enter the **BSSID** (Mac address of the wireless access point) and **Nickname** of the Wireless Access Point.
Note: BSSID is not the same as the SSID of the access point.
5. Select an **Emergency Response Location**, then click **Save**.

Adding an IP address range to the IP address range map

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **IP Address Range Map**.
3. Click **+ Add Network**.
4. Enter the **Network Name** and select the **Site** (for multi-site accounts).
5. Click **+ Add** in the **Public IP Address(es)** section.
6. Select **Single** or **Range**, then enter the IP address or IP address range, and then click **Save**.
7. Click **+ Add** in the **Private IP Addresses** section.
8. Select **Single** or **Range**, then enter the IP address or IP address range.
9. Enter a **Nickname** and select an **Emergency Response Location**, then click **Save**.
10. Click **Save**.

Note: IP address ranges need to be specified as the combination of public IP address and all private IP ranges. For example: your devices are in the following private network range : 192.169.10.0 - 192.168.10.255. You also have two IP addresses from your Internet Service Provider. To define this network you would add the network, add two single IP addresses as public IP addresses as well as one private IP address range using the steps described above.

Adding an ethernet switch to switch map

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Switch Map**.
3. Click **+ Add Switch**.

4. Enter the **Chassis ID** and **Nickname** of the ethernet switch. In many cases, the Chassis ID will be the MAC address of the switch.
5. Select an **Emergency Response Location**, then click **Save**.

Selecting a User extension to be treated as nomadic

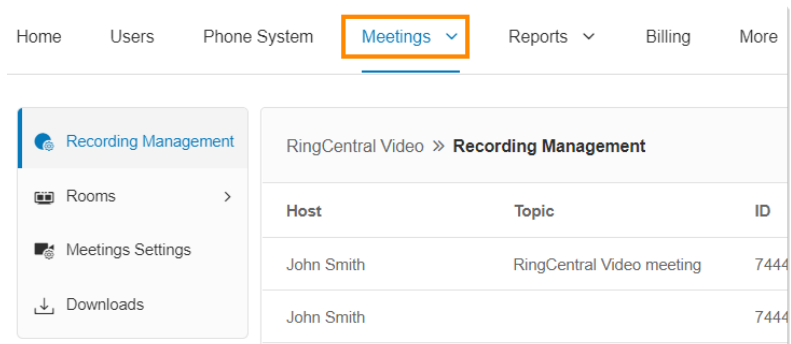
After enabling the Automatic Location Updates, you can select a User Extension to be treated as nomadic.

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Extensions**.
3. Select the User extension to be treated as nomadic by clicking **Activate** at the top of the **Status** column. To remove a User Extension, select the extension, then click **Deactivate** at the top of the **Name** column.

Meetings

The **Meetings** tab is where you can see information and configure the settings related to your meetings. Here, you can see the following tabs:

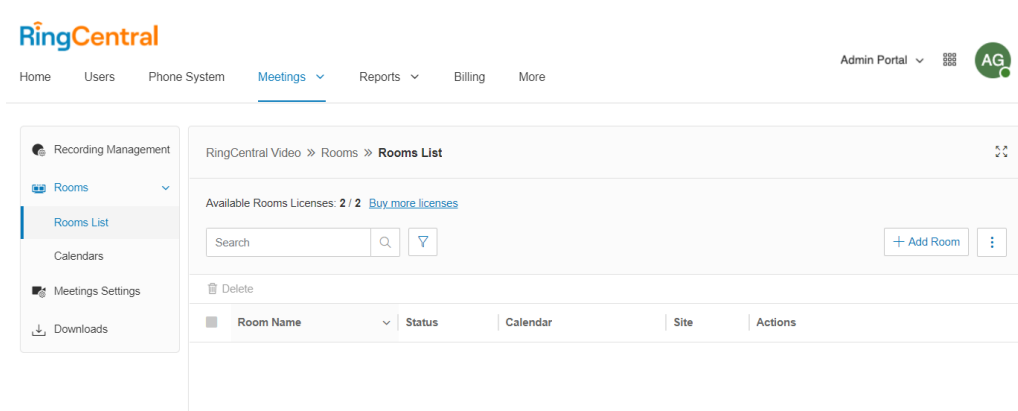
- Recording Management
- Rooms
- Meetings Settings
- Downloads



Accessing and managing Rooms

When you have purchased a RingCentral Rooms License and set up the hardware for your RingCentral Rooms system, you can access and manage it on your online account.

1. Click the **Meetings** tab from the **Admin Portal**.
2. Click **Rooms**. You can view the following tabs:
 - **Rooms List**: This menu lets you view the list of all Devices and Rooms in the account. It also allows you to modify the Global Settings, add or edit Locations and Rooms, upgrade all Devices, and export rooms.
 - **Calendars**: This tab allows you to add Calendar Services (Google Calendar, Office 365, Exchange) that can be integrated with RingCentral Rooms. It also lets you authorize or deauthorize, sync, and delete calendars.



Managing Meetings settings

RingCentral Video allows admins and users to conveniently control the features with a user-friendly settings interface that is available on the RingCentral online account. Account admins have the capability to enable and disable RingCentral Video features that will be applied for all RingCentral Video users on the account.

1. Click the **Meetings** tab from the **Admin Portal**.
2. Click **Meetings Settings**.
3. Admins can enable and disable RingCentral Video features on their account. The following sections are available:
 - a. **Security**
 - b. **Basic**
 - c. **Recordings**
 - d. **Email Notifications**

The screenshot displays the RingCentral Admin Portal interface. At the top, a navigation bar includes links for Home, Users, Phone System, Meetings (selected), Reports, Billing, and More. A left-hand sidebar contains a menu with Recording Management, Rooms (with a dropdown arrow), Rooms List, Calendars, Meetings Settings (highlighted with a blue bar), and Downloads. The main content area is titled 'Meetings' and is divided into four sections: Security, Basic, Recordings, and Email Notifications. Each section contains a list of settings with toggle switches and lock icons.

Section	Setting	Toggle	Lock Icon
Security	Enable meeting password for scheduled meetings	On	Yes
	Allow only authenticated users to join meetings	Off	Yes
	Require participants to enter a waiting room before joining the meeting	Off	Yes
	Participants can only join after the host	On	Yes
	Restrict screen sharing to hosts & moderators	Off	Yes
Basic	Play sound when participants join or leave	Off	Yes
Recordings	Allow meetings to be recorded	On	No
Email Notifications	Send email notification when meeting recording is ready	On	Yes
	Send email notification when meeting recording is deleted	On	No
	Send email notification when meeting recording is shared	On	No
	Send email notification when meeting has ended	Off	No

Call log reports

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

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

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

To access the call log:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Call Log**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Reports' tab is selected, and a dropdown menu is open, showing 'Call Log' as the first option. Below the navigation bar, the 'Call Log' report is displayed in 'Simple' view. It features a search bar, a date range selector set to 'Last 7 days', and buttons for 'Reset', 'Apply', 'Download', and 'Delivery Settings'. The main content area is a table with the following columns: Type, Phone Number, Name, Date / Time, Recording, Action, Result, and Length. Two missed calls are listed:

Type	Phone Number	Name	Date / Time	Recording	Action	Result	Length
☐	From: (310) 555-1212	WIRELESS CA...	08/03/2020 3:58 PM	-	Phone Call	Missed	0:00:27
☐	From: (310) 555-1212	WILLIAM HUB...	08/03/2020 11:14 AM	-	Phone Call	Missed	0:00:18

Downloading call log and recorded calls

You can download the Call Log in .csv format and the recorded calls in mp3 format from the Call Log page. The downloaded file will only contain the details of the filter you have selected.

Downloading the Call Log and recorded calls may take some time and may possibly time out. The Background Call Log feature makes it possible to avoid your downloads from timing out and lets you work in the background or switch to another page on your RingCentral Online account. Contact Support or your Account Manager to have the Background Call Log feature enabled.

To download your call log and recorded calls:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Call log**.
3. Click the Type of View: **Simple** or **Detailed**.
4. Filter the information that you wish to include in the Call Log Report.
5. Click **More** to select other information filters.
6. Click **Apply**.
7. Click **Download**.
8. **Call Log (csv)** is selected by default. Select what needs to be downloaded: **Call Log** or **Recorded Calls** or **both**. If you select **Recorded Calls (mp3)**, all call recordings will be downloaded. Click **Download** to save the file on your computer.

Note: If the Background Call Log feature is disabled, you will not be able to exit from the current window until the download gets completed. If the Backlog Call Log feature is enabled, a pop-up window will advise that your download has started and may take a while depending on the size of the file and internet connection. Click **OK** to close it.

The screenshot shows the RingCentral Admin Portal interface for the Meetings section. The top navigation bar includes Home, Users, Phone System, Meetings, Reports (highlighted with a dropdown), Billing, and More. The Reports dropdown menu is open, showing options for Call Log, Meetings Reports, and Analytics. The main content area is titled 'Simple' and 'Detailed'. Below this, there are filters for 'Search Numbers', 'Last 7 days', 'Call Direction', 'Types of Call', and 'All'. A 'Select Ext' button is also present. A 'Reset' button and an 'Apply' button (highlighted with a callout) are at the bottom of the filter section. A table of call logs is displayed with columns for Type, Phone Number, Name, Date / Time, and Recording. A 'Download Call Log' modal is open on the right, showing options to download the 'Call Log (csv)' or 'Recorded Calls (mp3)'. The modal includes a 'Cancel' button and a 'Download' button.

1. Reports

2. Call Log

3. Simple

4. Search Numbers

5. More

6. Apply

7. Download

8. Download Call Log

Download Call Log

Only the current filtered view of the call log will be downloaded.

Download:

☒ Call Log (csv)

☐ Recorded Calls (mp3)

Cancel Download

Analytics

The Analytics Portal lets you access reports such as Adoption & Usage, Performance, Company Numbers, Device Status, Live Reports, Meetings Dashboard, and Quality of Service. It also lets you view existing Historical Reports under the Subscriptions tab.

To access the Analytics Portal:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. If it is your first time logging in, you will be asked to authorize the Analytics Portal to sign in with your RingCentral credentials. Click **Authorize**.
4. The Analytics Portal contains the follow tabs:
 - Adoption & Usage
 - Company Numbers
 - Meetings Dashboard
 - Performance Reports
 - Quality of Service
 - Rooms & Devices
 - Alerts
 - Subscriptions

Adoptions and usage

Adoption & Usage (A&U) Analytics gives visibility into usage and adoption patterns of the RingCentral products across your organization. You can gain intelligent insights on the following:

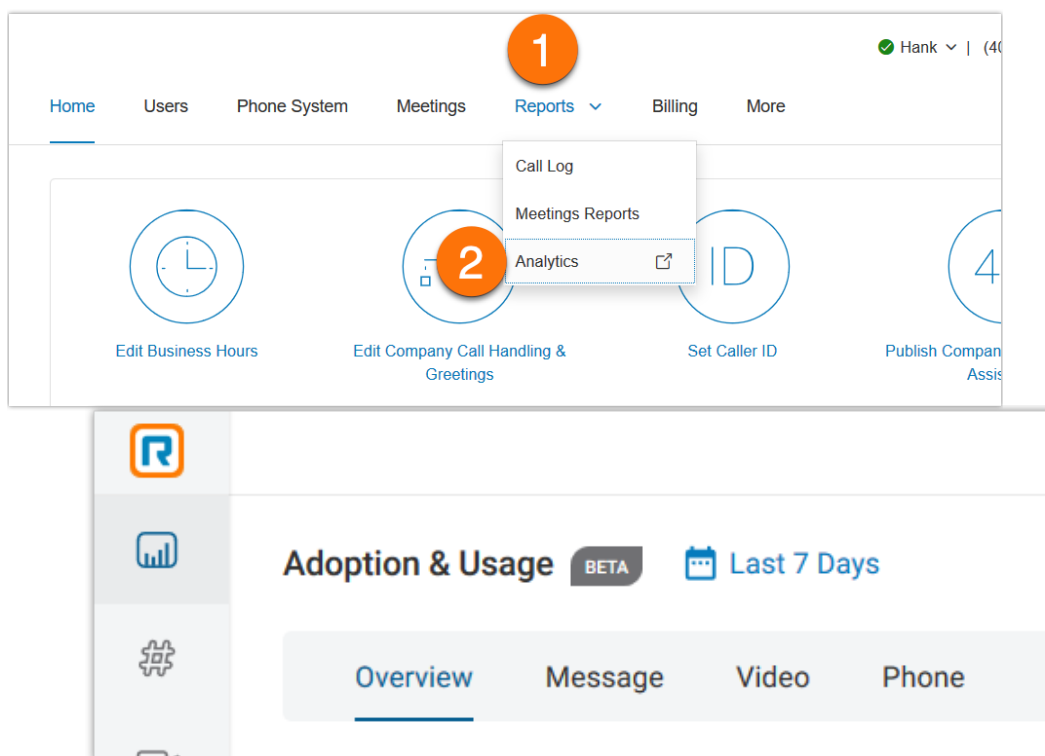
- if, and how, RingCentral products are being used (at the organizational level or across sites and departments)
- determining the power users
- trends and patterns of usage
- who are the low users/non-users
- which locations/departments could benefit from a training session
- user preferences such as preferred devices
- most used endpoints, etc.

To access:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics** to open the Analytics portal on another page.
3. The **Adoption & Usage** tab is the landing page of the Analytics Portal.

From the Adoption & Usage tab, you can select to view the following tabs:

- **Overview:** Dashboard showing all Message, Video, and Phone metrics
- **Message:** RingCentral app
- **Video:** RingCentral Video analytics
- **Phone:** RingCentral Telephony/PBX



Company numbers reports

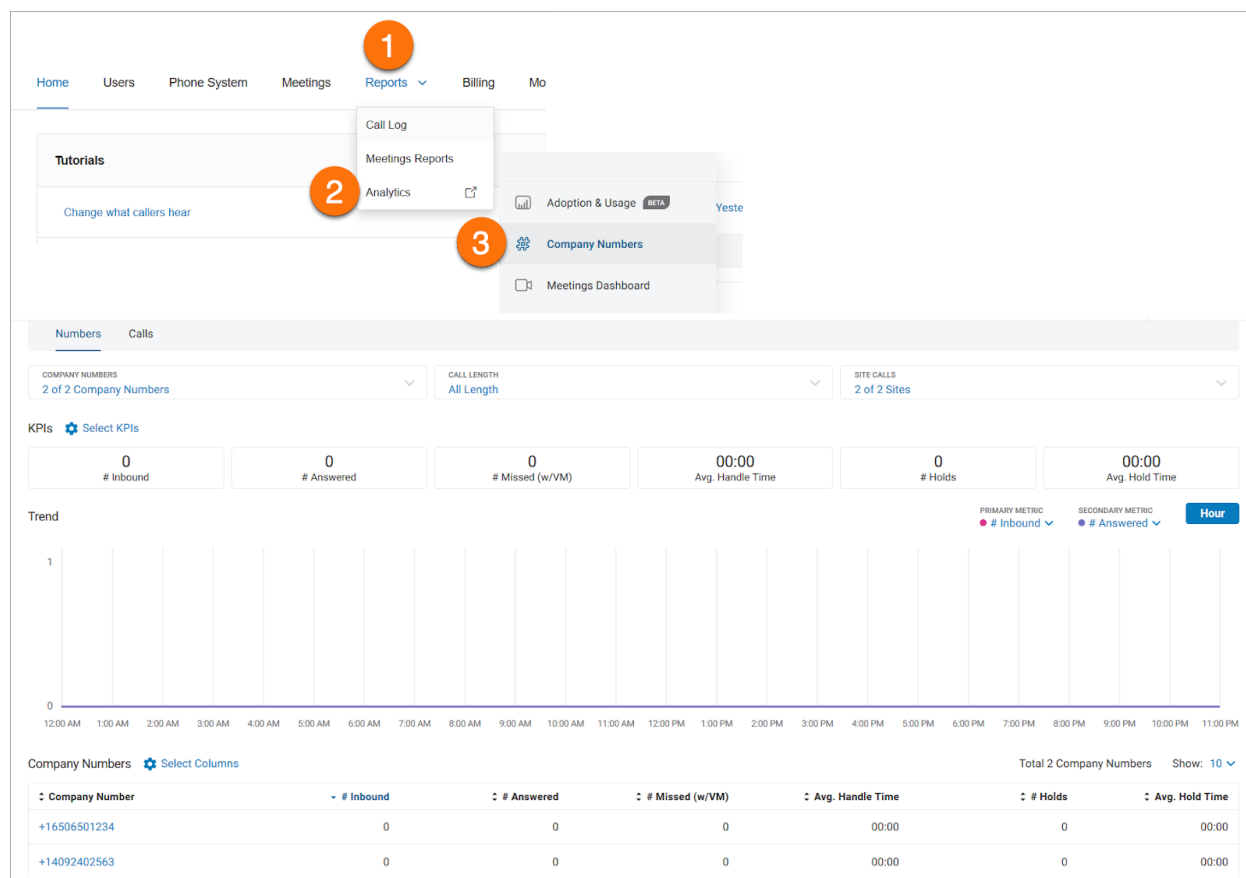
The Analytics Portal can generate a report using Company Numbers. There are also a number of Key Performance Indicators (KPIs) available for this report.

Company Numbers KPIs include the following:

- The number or percentage of all inbound calls answered on a company number
- The number or percentage of all calls to a company number in which a Voicemail was left
- The number or percentage of all calls that were missed (includes voicemail)
- The total amount of handle time the user spent on the calls on a company number. Handle time is all live talk time and all hold time
- The average duration of a company number call, from answered until terminated. This includes live talking plus time on hold
- The number of calls placed on hold for the numbers selected, the average hold time, or the number of abandoned calls put on hold
- The number of calls transferred, parked (or answered from park), total park time and the number of calls abandoned while the caller was put on park

To access Company Numbers:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click the **Company Numbers** tab.



Performance reports

The RingCentral Performance Reports tab is an additional tool that enables you to research call records to determine your business unit performance. By using Key Performance Indicators (KPI) as well as targeted filters, Performance Reports assists you in combining user, queue, and call activity to evaluate performance.

Performance Reports offer the following features and benefits:

- Dozens of available KPIs for a deeper understanding of performance
- New modern interface, with extremely fast performance
- Targeted filters available for all reports providing better investigation
- Highly customizable reports to individualize reporting experience
- Enhanced capabilities to better match customer behaviors

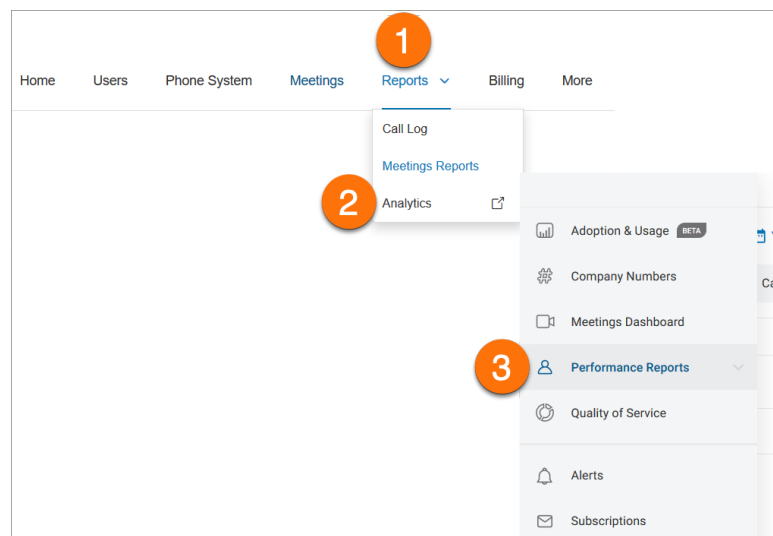
The Performance Reports page contains the follow tabs:

- **Queues:** Call queue performance for the call segment that is relevant to each queue

- **Users:** User performance in the context of inbound and outbound calls for the call segment that is relevant to each user. If User Groups are in use (Ultimate and Premium plans), only users from queues and defined user groups are available for monitoring
- **Calls:** Lists the breakdown of the call records with basic metadata

To access Performance Reports:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics Portal**.
3. Click **Performance Reports**.



Quality of Service reports

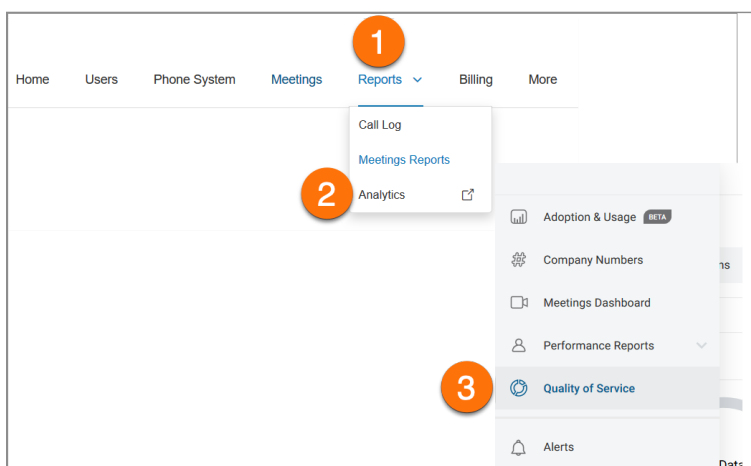
The Quality of Service reports provide near real-time information on the global health of the account and RingCentral Video and allows for proactive monitoring and reactive troubleshooting of potential issues. It gives you the ability to anticipate and diagnose call quality issues impacting your users globally before they escalate to critical problems.

To access Quality of Service reports:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Quality of Service**.

The Quality of Service page contains the following tabs:

- **Overview:** This tab enables you to:
 - Monitor overall account level quality proactively.
 - Monitor audio stream quality on top Geo locations.
 - Monitor patterns of audio quality for top ISPs and Endpoints.
 - Understand the impact of meeting stream volume on quality.
 - Filter quality information with different dimensions.
- **Extensions:** The Extensions tab features QoS analysis by user name or extension. It displays the aggregate data for an individual user, allowing for a much deeper analysis of the call and RingCentral Video meeting quality by leveraging user-specific graphs and trends.
- **Calls:** The Calls tab lets you view call quality data at a per call level so that you can identify specific quality issues.
- **MOS Performance:** The Mean Opinion Score (MOS) Performance dashboard provides an overview of call quality levels based on the minimum and target MOS thresholds for the previous month.
- **Meetings:** This enables you to:
 - Reactively troubleshoot when their employees report issues with their meetings.
 - List down a record of all meetings held within the selected timeframe.
 - Filter by various dimensions to be able to narrow down the list of records.



Rooms and Devices reports

The Rooms & Devices report provides admins the ability to proactively monitor the global health of the company's RingCentral Rooms and hard-phone infrastructure. The report can be used to identify issues impacting users regarding service availability of Rooms and hard-phones.

The rooms part of this report provides an overview of the rooms' conditions over time, providing the trends and patterns of the devices. It provides data about the rooms' location, health, and status. It also gives information about the Host and Controller's model, operating system, app version, and status.

The Rooms & Devices page contains the following tabs:

- **Overview:** Provides the admins with visibility into the current state of RingCentral Rooms and hard-phones globally.
- **Rooms:** Lets you filter data by name, location, date range, room health, room status, ISP, Host's app version, and Controller's app version. This section is divided into 2 parts, Health Trend and Rooms list.
- **Devices:** Provides a list of offline devices with detailed information now and in relation to a historic (within the last 7 days) time period, to allow users to see the offline devices overtime
- **Unprovisioned Devices:** Devices that were recorded in the RingCentral system, but have never been set up.

To access Rooms & Devices:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Rooms & Devices**.

Creating analytics alerts

The RingCentral Analytics Portal allows you to create alerts based on your analytics data.

To create an alert, follow these steps:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Alerts**.
4. Click **Alerts List**, then click **Create New**. For first time setup, click **Create New** in the middle.
5. Configure the parameters of your alert.
 - a. **General Information:** Enter the Alert Name and Alert Severity.
 - b. **Alert Trigger:** You can set your Target, Target Value, Trigger, Condition, Threshold, Monitoring Timeframe, and Alert Frequency.

- c. **Advanced Options:** Monitor your specific endpoints, day of the week, time of the day, or over a minimum call leg volume.
- d. **Delivery Channel:** You have a choice to receive your alert notifications via email or RingCentral app.
- e. **Edit Settings:** Alert owner can restrict access to an alert to View only (locked alert) or Edit (unlocked alert).

6. Click **Create Alert**.

The screenshot shows the RingCentral Admin interface. The top navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. A dropdown menu is open under 'Reports', showing 'Call Log', 'Meetings Reports', and 'Analytics'. The 'Alerts' section is highlighted in the left sidebar. The 'Create New Alert' form is displayed on the right, with fields for 'Alert Name', 'Alert Severity', 'Alert Trigger' (Target, Target Value, Trigger, Condition, Threshold), 'Monitoring Timeframe', 'Alert Frequency', 'Advanced Options' (Endpoints for Monitoring, Monitoring Hours, Minimum Leg Volume), 'Delivery Channel' (Delivery Channel, Recipients), and 'Editing Settings' (Only Owner can edit this alert). The 'Create Alert' button is at the bottom.

Creating report subscriptions

Subscriptions provide a way for you to automatically generate reports and send them via email to recipients. For example, if you would like a report generated that shows the number of calls that were abandoned while the caller was put on hold, you can do so with a subscription setting for a Queue Report.

To make use of the Subscription feature, you must first save a generated report. After that, you can use the Subscription page to send the report via email.

To save a report for the example given above:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Performance Reports**, then select **Queues**.
4. Click **Select KPIs**.
5. Tick the box for **# Abandon (Hold)**
6. Click **Done**.
7. Click **Save** in the upper right.
8. Enter a report name.
9. Click **Save**.

To create a subscription:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Subscriptions**.
4. Click **Create Subscription**.
5. Under **General Information**, enter the subscription name. Click the dropdown menu for **Report Type** and select (from the example above) **Performance Report**. Click the dropdown for **Report** and select the name of the report you saved. Note that only reports you have generated are available to you in this list.
6. Select the tabs.
7. Select the **Email Delivery Schedule**.
8. Select the **File Type** to be generated.
9. Enter the email address for the recipient of the report in the **Email the report to** field. You can specify more than one email address by clicking the plus sign (+) and adding other email addresses.
10. Click **Create Subscription**.

Subscriptions should be created on reports that have preset date-time windows such as yesterday, last week, last month, etc., in Performance Reports. Saving a report with a custom date range with specific dates will result in the recipient receiving the same report repeatedly. The user who created the Subscription

Report has exclusive permissions to see, edit, and delete the subscription. No other user will have access to the subscription.

The screenshot illustrates the process of creating a new subscription report in the RingCentral Admin Guide. The steps are numbered 1 through 10:

1. Click on the **Reports** menu item in the top navigation bar.
2. Click on the **Analytics** option in the dropdown menu.
3. Click on the **Subscriptions** option in the left sidebar.
4. Click on the **Create New Subscription** button.
5. Enter the **SUBSCRIPTION NAME** in the text field.
6. Select the **REPORT TYPE** (e.g., Performance Report) and the **REPORT** (e.g., Abandon Rate).
7. Select the **FREQUENCY** (e.g., EVERYDAY) and the **TIME** (e.g., HOUR, AM/PM).
8. Select the **FILE TYPE** (e.g., Excel).
9. Enter the **EMAIL** address in the text field.
10. Click on the **Create Subscription** button.

Billing

The Billing tab leads to menus for managing your Usage, Calling Rates, Meetings (including licenses), and Device Orders. View and edit your service plan, payment information, international calling plans, and cost center codes here.

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

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

Overview page

The Overview page of the Billing tab contains information about your service plan, additional services, and payment information. This is the landing page of the Billing tab.

The screenshot displays the RingCentral Billing Overview page. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing (selected), and More. The left sidebar lists various billing-related options: Overview (selected), Service Billing Detail, Billing History, Payment Method, Licenses & Inventory, Usage, Calling Rates, Purchase, Meetings, and Device Orders.

The main content area is titled "Billing » Overview" and contains several sections:

- Your Plan:** RingCentral Premium. Status: Active. Billing Cycle: 11/28/2020 - 12/27/2020. Billing Plan: Monthly. Links: Change, Cancel.
- General Usage:** Current Plan Usage: 10 minutes / Unlimited. Paid SMS Usage: View Log. Mobile Users: View History. Link: View All Usage Detail.
- Credits:** Available Account Credits: \$0.00. Pending Credit: \$0.00. Free Service Credit: \$0.00.
- Services:** View Details. Monthly Charges: \$723.87/month. Next Billing Date: 12/28/2020.
- Upcoming Charges:** \$723.87 (Fees and Taxes excluded). Billing Date: 12/28/2020.
- Auto-Purchase:** Calling Credit Package: \$20.00 (equivalent to 513 Plan minutes at 4¢ or 6,667 API credits at 0.3¢). Link: Change.
- Payment Method:** Payment Type: Credit Card. Card Number: XXXX-XXXX-XXXX-1111. Card Type: Visa. Expiration Date: 12/2032. Link: View Detail.
- Billing History:** A table showing recent billing events.

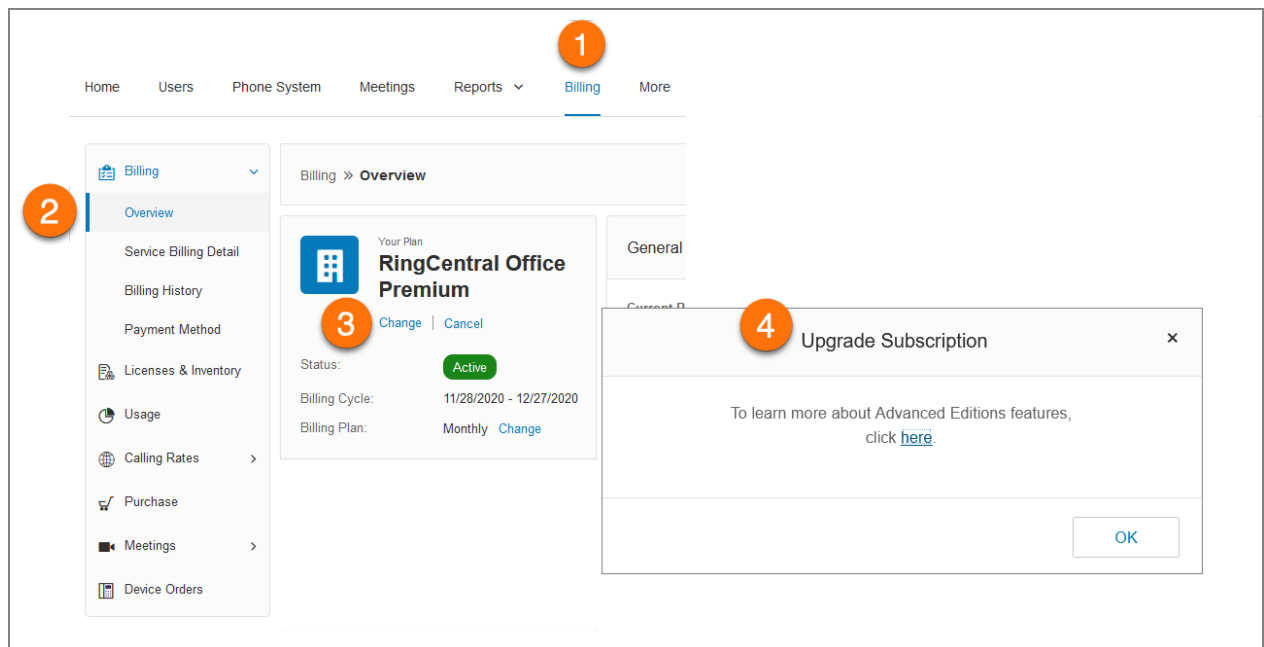
Date	Reference #	Description	Amount	Status
11/28/2020	2583543002	Recurring State...	\$894.40	Paid in Full
11/25/2020	2550470002	Change Order	\$0.74	Paid in Full
10/28/2020	1758189001	Recurring State...	\$888.87	Paid in Full

Link: View Full Billing History

Managing your service plan

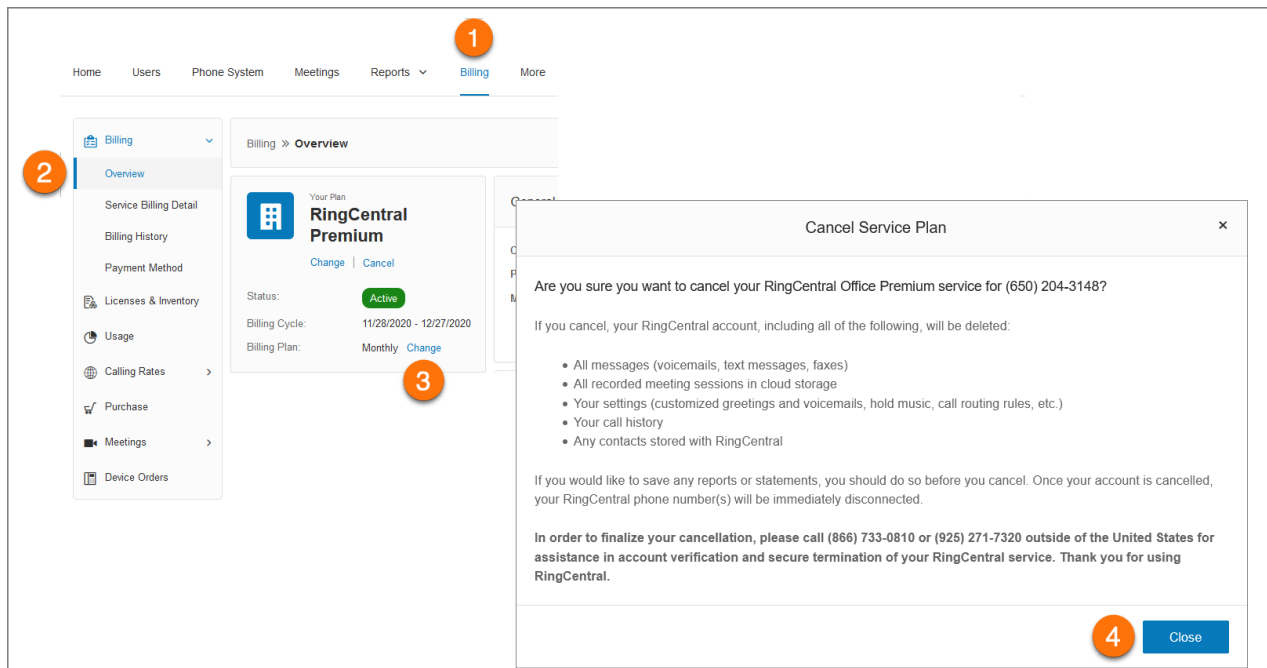
Viewing/changing service plan

1. Click the **Billing** tab from the **Admin Portal**.
2. On the Overview tab, the service plan is under **Your Plan**.
3. Click **Change** to open the **Upgrade Subscription** window.
4. Click **here** to open the [RingCentral Plans and pricing](#) page. To proceed with changing your Service Plan, contact RingCentral Support.



Canceling your service plan

1. Click the **Billing** tab from the **Admin Portal**.
2. Under Your Plan, click **Cancel**.
3. Follow the instructions on the **Cancel Service Plan** window.
4. Click **Close**.



Using auto purchase

The Auto Purchase feature ensures you will never run out of calling credits. The selected package will be automatically purchased when you are running low on calling credits, which prevents any potential interruption of service. Purchased funds will roll over month-to-month for up to 12 months.

To view and select options for auto-purchase:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Change** under **Auto-Purchase**.
3. Select the **Calling Credits Package** you wish to purchase.
4. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes links for Home, Users, Phone System, Meetings, Reports, and Billing (highlighted with a red circle '1'). The left sidebar shows the Billing menu with options like Overview, Service Billing Detail, Billing History, Payment Method, Usage, Calling Rates, Meetings, and Device Orders. The main content area is titled 'Billing > Overview' and shows details for the 'RingCentral Premium' plan, including status (Active), billing cycle, and annual charges of \$8,817.48. The 'Auto-Purchase' section (highlighted with a red circle '2') shows a 'Calling Credit Package' of \$20.00. A modal window (highlighted with a red circle '3') is open, titled 'Auto-Purchase', and contains the text: 'Auto Purchase feature ensures you will never run out of calling credits. The selected package will be automatically purchased when you are running low on calling credits, which prevents any potential interruption of service. Purchased funds will roll over month-to-month for up to 12 months.' Below this text, there are two radio button options for the 'Calling Credits Package': '\$20.00 (equivalent to 513 Plan minutes at 4¢)' (selected) and '\$100.00 (equivalent to 2,565 Plan minutes at 4¢)'. At the bottom right of the modal, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red circle '4'.

Viewing your Service Billing Detail

The Service Billing Detail tab contains information about your next billing date, service name, discounts, and charges.

1. Click the **Billing** tab from the **Admin Portal**.
2. Select **Service Billing Detail**.

1

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Calling Rates » Outbound Rates

Outbound long distance rates apply when calling international destinations from your RingCentral phone lines or when using the Call Me feature. You may disable international calling to specific destinations to avoid long distance charges.

International Calling International SMS

Search Status

✓ Enable ✕ Disable

	Status	Calls to*	Type	Prefix	Call Rate**	SMS Rate**	Actions
<input type="checkbox"/>	✓	Afghanistan	Mobile	937	38¢	15¢	⋮
<input type="checkbox"/>	✓	Afghanistan	Regular	93	28¢	15¢	⋮

Viewing your Billing History

Billing History contains a list of your billing transactions and billing statements.

To view your billing history:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Billing History**.

Click **View** at the far right to view and print your billing statement for the specified month

The screenshot displays the RingCentral Admin Portal interface. At the top, a navigation bar includes links for Home, Users, Phone System, Meetings, Reports, **Billing** (highlighted with a callout '1'), and More. On the right of the navigation bar are 'Admin Portal' and a user profile icon labeled 'AG'. A left-hand sidebar contains a 'Billing' dropdown menu (callout '2') with options: Overview, Service Billing Detail, **Billing History** (selected), Payment Method, Usage, Calling Rates, Meetings, and Device Orders. The main content area is titled 'Billing » Billing History'. It features a search bar, a 'Status' dropdown, and a 'Print' button. Below this is a table of billing transactions:

Date	Reference #	Description	Amount	Payment Method	Status	File
07/31/2020	950788001	Change Order	\$394.21	Visa [1111]	Paid in Full	3 View
07/29/2020	1840491002	Change Order	\$298.90	Visa [1111]	Paid in Full	View
07/26/2020	1804542002	Change Order	\$41.17	Visa [1111]	Paid in Full	View
02/28/2020	410615001	Recurring State...	\$10,278.96	Visa [1111]	Paid in Full	View

Viewing your payment method information

The Payment Method contains the credit card information attached to the RingCentral account.

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Payment Method**.
3. View your **Payment Information** and **Billing Address**.
4. Click **Edit**.
5. Edit your card details and billing address.
6. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface. At the top, a navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing (highlighted with a blue underline and a '1' callout), and More. On the right of the navigation bar, there is an 'Admin Portal' dropdown, a QR code icon, and a user profile icon labeled 'AG'. A left-hand sidebar menu is open, showing options like Overview, Service Billing Detail, Billing History, Payment Method (highlighted with a blue bar and a '2' callout), Usage, Calling Rates, Meetings, and Device Orders. The main content area is titled 'Billing » Payment Method' and includes a '+ Add Backup Credit Card' button. It is divided into two sections: 'Payment Information' (marked with a '3' callout) and 'Billing Address'. The 'Payment Information' section shows 'Card Number' (XXXX-XXXX-XXXX-1111 Visa) and 'Expiration Date' (03/2030). The 'Billing Address' section contains fields for First Name, Last Name, Contact Phone, Contact Email, Country (United States), Street Address (20 Davis Dr), Additional address (Optional), City (Belmont), State/Province (California), and Zip Code (94002-3002). An 'Edit' button with a pencil icon is located to the right of the 'Payment Information' section (marked with a '4' callout).

Licenses & Inventory

The Licenses & Inventory tab provides an overview of licenses and devices on your account in one place. You can filter by product category, cost center, and site.

To access Licences & Inventory:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Licenses & Inventory** to display a list that shows Product Name, Total, In-Use, Available, and Actions.
3. In the **Actions** column, click the dropdown arrow to show additional details.

Below is a list of licenses and devices you have on your account. You can filter them by product category, cost center and site to check inventory

Note: Licenses can be used across sites, full-paid devices can be used across cost centers.

Search

Product Name	Total	In-Use	Available	Actions
Office Licenses	9	9	0	
Domestic DigitalLine Unlimited	9	9	0	
Additional Local Numbers	4	4	0	
Domestic	4	4	0	
Desktop Phones	17	16	1	
Cisco 7841 Gigabit Business Phone <i>Purchased</i>	2	2	0	
Cisco 8861 Gigabit Color Business Phone with 1 Expansion Module <i>Purchased</i>	1	1	0	
Cisco 8861 Gigabit Color Business Phone <i>Purchased</i>	1	1	0	
Common Lines	9	9	0	
Rooms	1	0	1	
International Calling Credits Bundles \$300	1*			

Managing licenses

You can view, upgrade, and downgrade licenses and devices of users in your company's RingCentral account.

To view your users' active licenses:

1. Click the **Users** tab from the **Admin Portal**.
2. Click **Users with Extensions**.
3. Hover on the user you want to manage then select the license under the Licenses column.
4. This will open the license details, including the License name and quantity.

To update your users' licenses:

1. Click the **Users** tab from the **Admin Portal**.
2. Click **Users with Extensions**.
3. Hover on the user you want to manage, then click the more button at far right.
4. Click **Edit licenses** and select the license you want for the user. You can also select Add-on licenses if applicable to the license you are selecting.
Note: You can only upgrade a user to an available license in your inventory. If you don't have available licenses, you will need to purchase a new license.
5. Click **Update**.

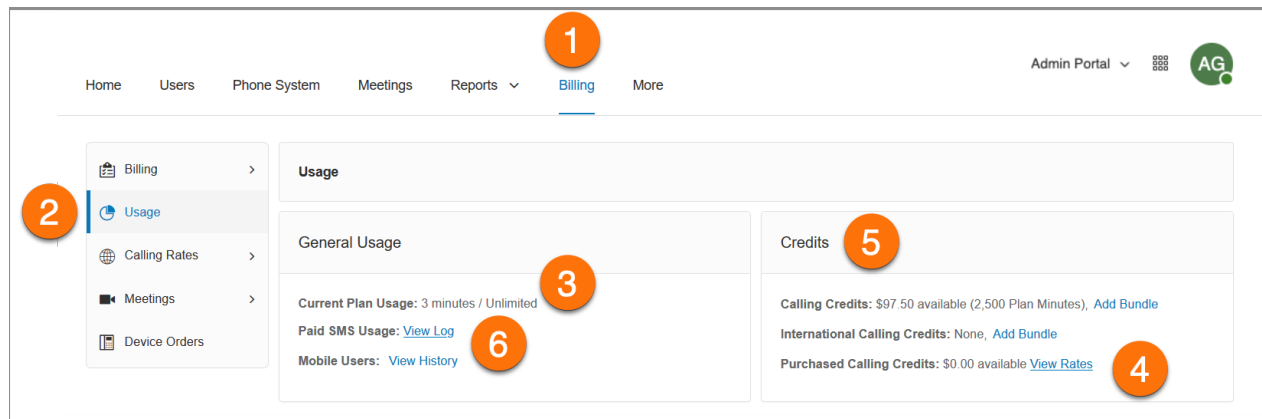
Note: The license of a downgraded user will be placed in the license inventory for future use.

Viewing your usage

The Usage tab includes your total used plan minutes for the current billing cycle, SMS log, mobile users, available included credits for your account, international calling credits, and purchased calling credits.

To view your Usage:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Usage**.
3. Under **General Usage**, the **Current Plan Usage** shows how many minutes you have used on your account's Unlimited Usage.
4. Click **View Log** for **Paid SMS Usage** to filter and display the SMS logs of the account.
5. **Calling Credits** shows the remaining minutes on your account. The number of minutes depends on the type of plan you have.
6. Click **View Rates** on **Purchased Calling Credits** to show the available purchased calling credits on your account.



Viewing mobile user history

A virtual extension is a user extension without an assigned digital line. Virtual extensions forward incoming calls to mobile phones, extensions, or other external numbers and allow for limited outbound dialing. It becomes a Mobile User extension if it makes or receives ten or more calls in a given month (billing cycle).

To view the mobile users in your account:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Usage**.
3. Click **View History** on **Mobile Users**.
4. Review the page for the number of mobile users.
5. Filter your view and click **Apply**.
6. View the **Renewal Period**, **Name**, **Extension**, and **Number of External Calls**.
7. Click **Done**.

The screenshot displays the RingCentral Admin Guide interface for the Billing section. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing (highlighted), and More. A sidebar on the left contains links for Billing, Usage (highlighted), Calling Rates, Meetings, and Device Orders. The main content area shows the Usage section with a sub-section for General Usage. The Mobile Users History table is displayed with columns for Renewal Period, Name, Extension, and Number of External Calls. The table is currently empty, showing a total of 0 records. A filter section at the top of the table allows filtering by Billing period (Current) and Select Ext. A pagination bar shows 25 records per page and 1 page total. A 'Send' button is located at the bottom right of the table, and a 'Done' button is at the bottom right of the page.

1

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Billing Usage Calling Rates Meetings Device Orders

3

Usage

General Usage

Current Plan Usage: 3 minutes / Unlimited

Paid SMS Usage: [View Log](#)

Mobile Users: [View History](#)

5

Mobile Users History

Filter by: Billing period Billing period: Current All Select Ext

Reset Apply 5

6

Renewal Period	Name	Extension	Number of External Calls
----------------	------	-----------	--------------------------

Total: 0 Show: 25 < 1 >

Send a report with detailed information to email.

Email

Send

7

Done

Adding calling credits bundles

The Credits section in the Usage tab contains your calling credits bundle and international calling credit bundle.

To add Additional Bundles:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Usage**.
3. To add a toll-free minute bundle:
 - a. Click **Add Bundle** on **Calling Credits**.
 - b. Select toll-free minutes bundle from the dropdown list.
 - c. Click **Next**.
 - d. Confirm your purchase.
4. To add an international calling credit bundle:
 - a. Click **Add Bundle** on **International Calling Credits**.
 - b. Select the international calling credit bundle from the dropdown list.
 - c. Click **Next**.
 - d. Confirm your purchase.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Billing' tab is selected in the navigation bar (1). The left sidebar shows the 'Usage' section selected (2). The main content area is divided into 'General Usage' and 'Credits' sections. The 'Credits' section contains 'Calling Credits' and 'International Calling Credits' with 'Add Bundle' links. Two modal windows are shown: 'Select Toll-Free Minutes Bundle' (3) and 'Select international bundle' (4). The 'Select Toll-Free Minutes Bundle' modal shows a dropdown menu with 'None (Free)' selected and a 'Next' button. The 'Select international bundle' modal shows a dropdown menu with 'None (Free)' selected and a 'Next' button. Both modals include a 'Note' about additional international calling usage being billed at standard international rates.

Managing Calling Rates

The Calling Rates tab under Billing contains international calling rates and premium domestic rates.

Enabling international calling and SMS

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Calling Rates**.
3. Click **Outbound Rates**.
4. Toggle on the switches for **International Calling** and **International SMS**.
5. You can search for the country to view the call rate and SMS rate.
6. To disable a specific country, do one of the following:
 - a. Tick the box beside the country, click **Disable**, and click Yes on the **Confirmation** window.
 - b. Click the **More** kebab icon at the far right of the country under **Actions**, click **Disable**, and click **Yes** on the **Confirmation** window.

Home Users Phone System Meetings Reports **Billing** More

Admin Portal AG

2 **3** **1** **4** **5** **6**

Billing > Usage > **Calling Rates** > Outbound Rates > Inbound Rates > Premium Rates > Meetings > Device Orders

Calling Rates >> **Outbound Rates**

Outbound long distance rates apply when calling international destinations from your RingCentral phone lines or when using the Call Me feature. You may disable international calling to specific destinations to avoid long distance charges.

☒ International Calling ⓘ ☐ International SMS ⓘ

Search Status

✓ Enable ✕ Disable

<input type="checkbox"/>	Status	Calls to*	Type	Prefix	Call Rate**	SMS Rate**	Actions
<input type="checkbox"/>	✓	Afghanistan	Mobile	937	38¢	15¢	⋮
<input type="checkbox"/>	✓	Afghanistan	Regular	93	28¢	15¢	⋮

Viewing inbound rates

The Inbound Rates tab shows the rates when you receive calls to your RingCentral local or toll-free number from specific countries.

To view the Inbound Rates:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Calling Rates**.
3. Click **Inbound Rates**.

Home Users Phone System Meetings Reports **Billing** More

Admin Portal AG

Calling Rates » **Inbound Rates**

The following inbound rates are applied when you receive calls to your RingCentral local or toll free number in countries listed below. Adding international local or toll free numbers allows you to have an easy to reach local presence in many different countries without having to set up local phone plans. International local and toll free numbers can also be used for premium conferencing numbers.

Search

Calls from	Type	Country Code	Call Rate*
Algeria	Local	213	12.4¢
Angola	Local	244	9¢

Viewing premium rates

The Premium Rates tab shows the premium domestic rates.

To view the Premium Rates:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Calling Rates**.
3. Click **Premium Rates**.

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Admin Portal AG

Calling Rates » **Premium Rates**

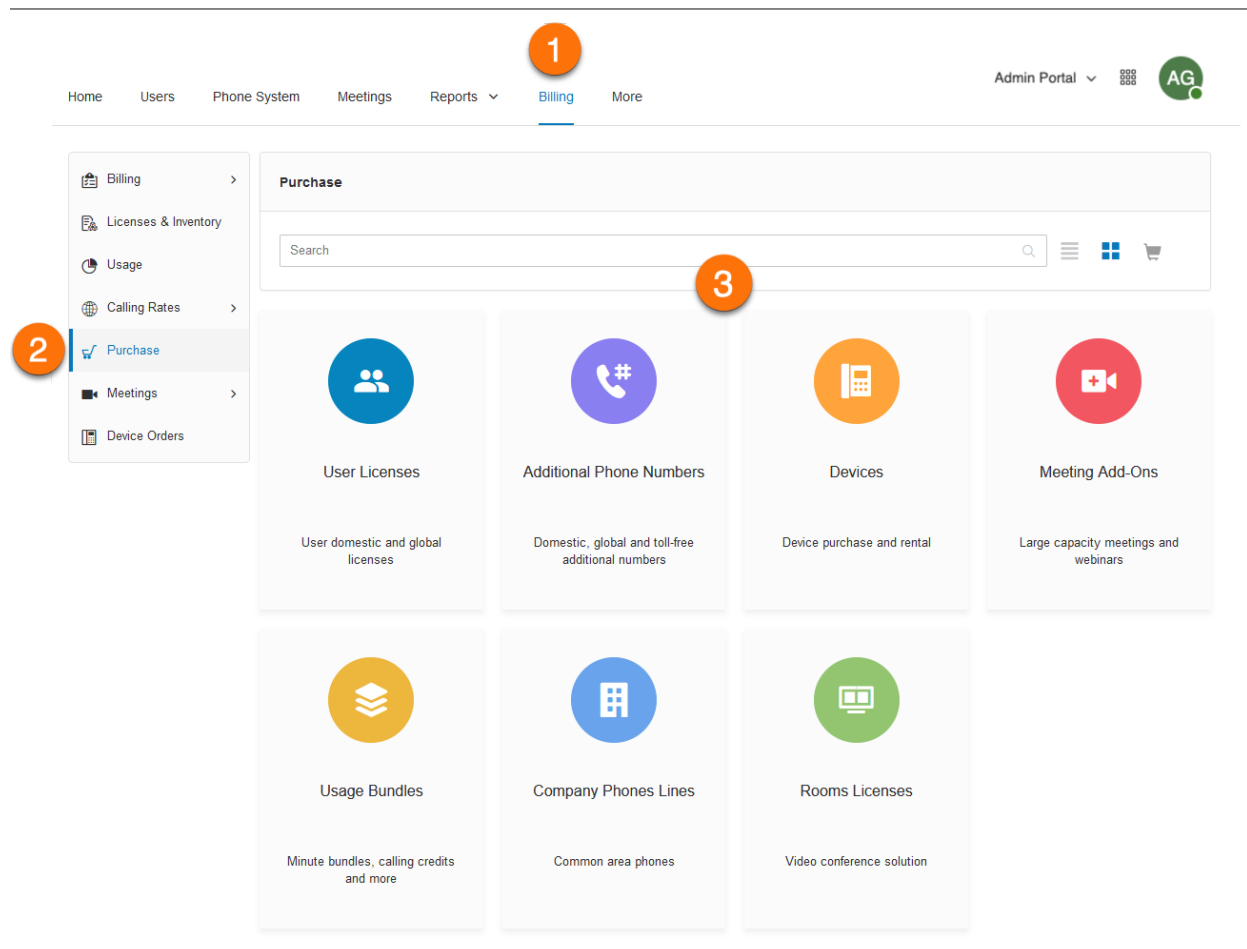
In the US / Canada, premium domestic rates apply when you receive an incoming call from Alaska or Hawaii to your toll free number. You may disable inbound calls from Alaska and Hawaii to your toll free numbers to avoid incurring premium charges.

Status	Calls from	Type	Country Code	Inbound Calls to Toll Free Num...	Actions
✓	Hawaii	Regular/Mobile	1	3.9¢	⋮
✓	Alaska	Regular/Mobile	1	3.9¢	⋮

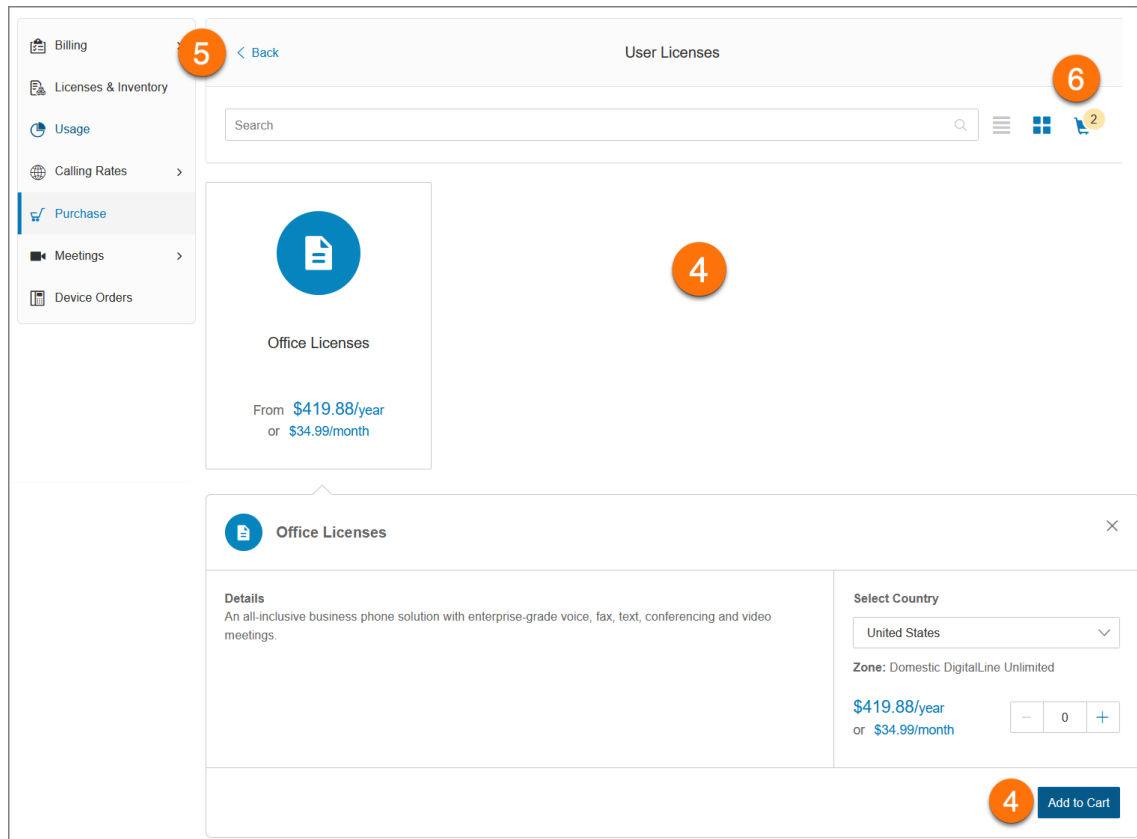
Managing Purchases in the Billing tab

The Purchases tab gives you a catalog of purchase options in one convenient place.

1. Click the **Billing** tab from the **Admin Portal**.
2. Click on **Purchase** for an overview of purchase options.
3. Click on any tile to see relevant purchase options, or use the Search field to type in your search criteria.



4. Click Add to Cart in the lower right corner to add your selection to your shopping cart.
5. To buy additional products, click **Back** in the upper left corner of the pane to return to the Purchase overview page and continue shopping.
6. Or, click on the shopping cart icon at the upper right corner to access your shopping cart.



Using the Shopping cart to check out




When you're finished shopping and are ready to check out, click on the shopping cart icon in the upper right corner. A **Review Items and Checkout** window displays to lead you through completing the process. The screen may vary depending on your selections.

Review Items

Review your purchases, change quantities or delete items.

Review Items and Checkout

1 Review Items
2 Assign Site
3 Add Shipping Info
4 Review Order
5 View Statement

Product Name	Price per Item	Qty	Total Price	Actions
Recurring Items (2)				
 Office Licenses Domestic DigitalLine Unlimited - United States	\$419.88/year \$34.99/month	- 1 +	\$419.88/year \$34.99/month	Delete
 Webinars Webinar 100	\$400.00/year \$33.33/month	- 1 +	\$400.00/year \$33.33/month	Delete
One-time Purchase Items (5)				
 Cisco CP6821 Business IP Phone New Phone, United States	\$99.00	- 5 +	\$495.00	Delete
<div> Recurring \$819.88/year ⓘ One-time Purchase \$495.00 </div> <div> Today's Estimated Total** \$1,314.68 </div> <div> **This price does not include calculations for prorated amounts, taxes, fees, and/or shipping. </div>				

Back
Next

Assign Site


In this pane, you can choose a site to which you want the new assets assigned. Use the **Select Site** dropdown field in the upper right, or use the dropdown in the **Site** column. Assign all assets to the same site, or choose **Split** in the **Actions** column to allocate resources to different sites. Click **Assign to Selected**, then click **Next**.

Review Items and Checkout

✓ Review Items
2 Assign Site
3 Add Shipping Info
4 Review Order
5 View Statement

Assign Site to Items (5)

Select Site
Select Site
Assign to Selected

<input type="checkbox"/>	Product Name	Site	Qty	Actions
<input type="checkbox"/>	 Cisco CP6821 Business IP Phone New - United States	Select Site	5	Split

Back
Next

Add Shipping Info

Choose a ship-to address from the **Select Shipping Address** dropdown. Choose **Edit** to modify an existing address or **New** to add a new address. In the **Attention to** field, add a recipient name. Choose a shipping method from the **Select Shipping Method** dropdown. Check the box to the left of the entry you want to assign. Choose **Split** in the **Actions** column to allocate purchases to more than one recipient. Click **Next**.

Add Shipping Info



✓ Review Items
✓ Assign Site
3 Add Shipping Info
4 Review Order
5 View Statement

Auto-assign the shipping address based on Site address. Attention to and Ground Shipping will be the default.
Auto Assign

Select Shipping Address
Attention to
Select Shipping Method

20 Davis Dr, Belmont, CA, 94002-3002, United States
Edit
New
Something New
Ground
Assign to Selected

Add Shipping Info to Items (5)

<input type="checkbox"/>	Product Name	Qty	Actions
<input checked="" type="checkbox"/>	 Cisco CP6821 Business IP Phone New - United States	4	Split
<input type="checkbox"/>	 Cisco CP6821 Business IP Phone New - United States	<input type="text" value="1"/>	Remove Split

Shipping Groups

Add Shipping Info	Attention to	Shipping Method	Device Qty	Actions
No shipping groups has been created yet.				

Back
Next

Review Order

The **Review Order** pane shows an itemized list of purchases for the current order and their cost breakdown. Click the checkbox next to the acknowledgement at the bottom of the pane, then click **Next**.

Review Items and Checkout

✓ Review Items

✓ Assign Site

✓ Add Shipping Info

4 Review Order

5 View Statement

Period	Charges and credits	Unit Price	Quantity	Amount
02/28/2020 - 02/27/2021	DigitalLine Unlimited (new purchase)	\$419.88	1	\$419.88
02/28/2020 - 12/16/2020	DigitalLine Unlimited - Prorate Adjustment	(\$336.13)	1	(\$336.13)
02/28/2020 - 02/27/2021	RingCentral Webinar 100 (new purchase)	\$400.00	1	\$400.00
02/28/2020 - 12/16/2020	RingCentral Webinar 100 - Prorate Adjustment	(\$320.22)	1	(\$320.22)
(One time charge)	Cisco CP6821 Business IP Phone	\$99.00	5	\$495.00
(One time charge)	Shipping & Handling Fees: US - Ground	\$6.05	5	\$30.25
Charges after Discounts and Prorates:				\$688.78
Taxes				Amount
> State and local taxes and fees				\$53.04
Compliance and Administrative Cost Recovery Fee				\$48.00
Compliance and Administrative Cost Recovery Fee - Prorate Adjustment				(\$38.43)
e911 Service Fee				\$12.00
e911 Service Fee - Prorate Adjustment				(\$9.61)
EUSF (VoIP)				\$4.09
Taxes after Discounts and Prorates:				\$69.09
Total charges after discounts and prorates:				\$688.78
Total Taxes and Fees:				\$69.09
Sub-total:				\$757.87
Total Charged to Credit Card:				\$757.87

All charges will appear as "RingCentral, Inc" on your credit card statement and will be charged to the credit card on file for this account. Your credit card information is encrypted and processed on a secure server.

☒ I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of **\$757.87** to be charged to my credit card ending in [*1111]. I further authorize the monthly recurring charges of \$819.88* beginning on 02/27/2021 and continuing until canceled, which is in addition to my regular charges.

* Prices do not include taxes, fees or discounts

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Next

View Statement

The View Statement pane shows a summary of all purchase and account details for your order. Click Print to keep a hard copy for your records. Click Done to complete the transaction.

Review Items and Checkout

[✓ Review Items](#)
[✓ Assign Site](#)
[✓ Add Shipping Info](#)
[✓ Review Order](#)
[5 View Statement](#)

Account Number:

(409) 240-2563

Billed To

RingCentral
Something New
20 Davis Dr
Belmont, CA 94002-3002
USA

Pay To

RingCentral, Inc.
20 Davis Dr
Belmont, CA 94002
USA

Service Plan:

RingCentral Office Premium

Statement Date:

12/16/2020

Paid By:

Visa[1111]

Reference#:

2444893002

Print
Done

Managing meetings in the Billing tab

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

RingCentral Rooms licenses

RingCentral Rooms offers a convenient way to start, join, and control RingCentral Video meetings in a conference room from an iPad or Poly controller. Use RingCentral Rooms to start or join RingCentral Video meetings which are initiated from different endpoints. RingCentral Rooms supports up to 200 participants in a single meeting.

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

Adding a Rooms license

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Meetings**.
3. Click **Rooms**.
4. Click **Add Licenses**.
5. Enter the number of licenses.
6. Click **Next**.
7. Review the charges. Tick the acknowledge checkbox to confirm your order.
8. Click **Next**.

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

Managing device orders

The Device Orders management feature allows you to view past orders and edit those device orders that are in *pending* status to change the devices ordered, or the shipping address.

An authorized agent can extend the deadline up to 9 hours from Admin Web after your initial order placement. You can edit those orders during this hold period. An order can only be modified a single time. After which, it is submitted immediately to the distributor for processing.

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Device Orders**.
3. Click **Edit Order** on a pending order.
4. Click the pencil icon to make changes. Select the items that you want to change and change the devices (one or many) to the desired device.
5. Once completed, new charges (or credits) are displayed under **Phone Order Charges/Credit**.
6. Click **Next**.

Device Orders

Search Order Time Period: Past 6 months

Order Number	Order Placed	Device Quantity	Status	Actions
162009027	09/11/2020 10:01 AM	4	Pending	Edit Order

Edit Order: 162009027

Please note: Only phone type and shipping can be modified for an existing order. To make any other changes, please call support (888) 898-4591.

Original Order

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

Order Changes

Quantity	Area Code	Phone	New Charges/Credits*
(2)	(415)	Polycom VVX-310 Gigabit Ethernet Phone	(\$418.00) (2 x \$209.00) - one time
2	(415)	Yealink W52P with 2 Handsets	\$678.00 (2 x \$339.00) - one time

Original Phone Order Charges

One Time Charges	Quantity	Sub-total*
Phones	4	\$836.00
Shipping Fees		\$21.55
Recurring Charges		Sub-total*
Phone Rental	0	\$0.00
Total Paid*		\$857.55

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

Phone Order Charges/Credits

One Time Charges/Credits	Quantity	Sub-total*
New Phones	2	\$678.00
Credits from Original Order	(2)	(\$418.00)
Recurring Charges/Credits		Sub-total*
New Phone Rental	0	\$0.00
Rental Credits from Original Order	(0)	(\$0.00)
New Sub-total Charges/Credits*		\$260.00

Cancel Next

7. Update the Shipping Address if needed. The shipping charge will be adjusted and will reflect on **New Shipping Fees**.
8. You will see a pre-statement and statement with Adjustments for the credits and charges for new phones.
9. Click **Next**.
10. Click **OK** to confirm that once submitted, you can no longer update the order.

Update Shipping for Order 162009027

Shipping Groups ⓘ

Quantity	Destination	Shipping Method			
2	1400 Faxon Island Blvd, Ste 700, San Mateo, CA,...	GROUND	View ▾	Change Shipping	Delete
2	20 Davis Dr, Belmont, CA, 94002-3002	GROUND	View ▾	Change Shipping	Delete

Select shipping for the phones below:

Add to Shipping Group

<input type="checkbox"/>	Phone	Phone Number	Assigned To	Ext.
All phones assigned to shipping groups				

Original Phone Order Charges

One Time Charges	Quantity	Sub-total*
Phones	4	\$836.00
Shipping Fees		\$21.55
Recurring Charges		Sub-total*
Phone Rental	0	\$0.00
Total Paid*:		\$857.55

Phone Order Charges/Credits ⓘ

One Time Charges/Credits	Quantity	Sub-total*
New Phones	2	\$678.00
Credits from Original Order	(2)	(\$418.00)
New Shipping Fees		\$28.42
Shipping Fees from Original Order		(\$21.55)
Recurring Charges/Credits		Sub-total*
New Phone Rental	0	\$0.00
Rental Credits from Original Order	(0)	(\$0.00)
New Sub-total Charges/Credits*:		\$266.87

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

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Review and Submit

Charges

One Time Charges	Charges	
Additional RingCentral Services ⓘ	\$586.42	Expand
Charges: \$586.42		

Adjustments

One Time Charges	Credit	
Credit - Additional RingCentral Services ⓘ	(\$390.83)	Expand
Adjustments: (\$390.83)		

Taxes, Charges and Fees

State and local taxes and fees	\$51.64
Taxes and Fees: \$51.64	
Total Charges: \$586.42	
Total Adjustments: (\$390.83)	
Total Taxes & Fees: \$51.64	
Sub-total: \$247.23	
Total deducted from account credit balance: \$0.00	
Total charged to credit card: \$247.23	

Adjustments are calculated based on the unused portion of your previous service(s) and deducted from the cost of your new service(s).

All charges will appear as "RingCentral, Inc." on your credit card statement and will be charged to the credit card on file for this account. Your credit card information is encrypted and processed on a secure server.

☒ I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of **\$247.23** to be charged to my credit card ending in ****1111.

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Notification

You are about to make changes to your original order. Each order can only be changed once. When you submit these changes, your order will be processed immediately and will no longer be eligible for future changes.

Cancel OK 10

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[Reports](#)
[Billing](#)
[More](#)

Admin Portal

AG

Billing

Usage

Calling Rates

Meetings

Device Orders

Device Orders

Order Number	Order Placed	Device Quantity	Status	Actions
162009027	09/11/2020 10:01 AM	4	Submitted	<input type="button" value="↑"/>

[Home](#)
[Users](#)
[Phone System](#)
[Meetings](#)
[Reports](#)
[Billing](#)
[More](#)

Admin Portal

AG

Billing

Usage

Calling Rates

Meetings

Device Orders

Device Orders

Order Number	Order Placed	Device Quantity	Status	Actions
162009027	09/11/2020 10:01 AM	4	Submitted	<input type="button" value="^"/>

Order Details

Package ID: 419008

Request Number: -1

Number of Device: 2

View Device List

Status: Submitted

Shipping Speed: GROUND

Tracking Number:

Shipping Address:

1400 Fashion Island Blvd, Ste 700, San Mateo, 94404-2073

Package ID: 420008

Request Number: -1

Number of Device: 2

View Device List

Status: Submitted

Shipping Speed: GROUND

Tracking Number:

Shipping Address:

20 Davis Dr, Belmont, 94002-3002

Using the Cost Center Management feature

The Cost Center Management feature allows you to manage and monitor expenses for groups or individuals. Administrators can assign purchases of RingCentral services to a department or an individual with cost center codes. Each transaction can be assigned to a specific cost center code that you have created. You can create cost center codes while you are in process or upload predefined codes.

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Cost Center Management**.
3. Click **Cost Centers**.
4. Select an existing **Cost Center Code**. If you do not have any cost center codes, see the next page on how to create one.
5. You will see the Cost Center's summary, which includes:
 - a. Number of users assigned to the Cost Center.
 - b. The Cost Center's total recurring charges per month.
 - c. Billing Items - Assigned: queue/user extensions and DigitalLines.
 - d. Billing Items - Unassigned and Shared: company numbers.
6. Click **See details** for the complete list of Billing Items.

Note: To enable the Cost Center Management feature, contact your RingCentral account manager.

The screenshot displays the RingCentral Admin Portal interface for Cost Center Management. The top navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing' (1), and 'More'. The left sidebar contains 'Billing', 'Usage', 'Calling Rates', 'Meetings', 'Device Orders', 'Cost Center Management' (2), 'Cost Centers' (3), and 'Billing Items'. The main content area is titled 'Cost Center Management » Cost Centers'. It features a dropdown menu for 'Cost Center: Customer Service' (4), a 'Sorting: Most Recent' dropdown, and a '+ Add Cost Center' button. Below this is a table listing cost centers for 'John Smith Company', including 'Customer Service' (5). To the right of the table is a 'See details' button (6). The 'Customer Service' row shows 'Users: 58' and 'Total Recurring Charges: \$1,851.80 / Month'. Below the table, the 'Billing Items' section shows 'Assigned (94): \$1,137.22 / Month' and 'Unassigned and Shared (148): \$714.58 / Month'.

Adding Cost Center codes

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Cost Center Management**.
3. Click **Add Cost Center**.
4. Enter your preferred **Name** and **Billing Code** (optional).
5. Click **Save**.

Note: Administrators can also add a Cost Center Code while processing a transaction. When the administrator is asked to assign a purchase to a Cost Center Code, there will be a button to **Add New Code** the administrator can click.

More

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

- **Audit Trail** lets you find and capture changes made by users that affect system events, configuration, and user accounts.
- **Service Status** allows Users and Administrators to view any high level service impacting issues on the RingCentral platform with or without logging in.
- **Appearance** lets you add your company logo to your RingCentral online account. You can also link your company logo to your company's website for smoother navigation.
- **Directory Integration** allows you to automatically provision users from your Active Directory or G Suite corporate directory into RingCentral.
- **Multi-Site Settings** allows you to configure and manage your different office locations under one account.
- **Single Sign-On (SSO)** lets employees in a company access multiple applications with one set of credentials. RingCentral SSO supports the Kerberos network authentication service (on Windows), as well as integrates with Google SSO.
- **Session Timeout** lets you configure a session timeout for all users.
- **Hot Desk Session Timeout** specifies the time period when guest users will be logged out from phone endpoints, or allows you to configure no timeout.
- **Masked Numbers** setting hides certain information from Administrators for a subset of users in order to meet country-specific compliance requirements.
- **Trust Portal** allows customers to access RingCentral's security and compliance documents. It provides audit reports and compliance documentation to assist customers with their compliance, regulatory, and data protection diligence.
- **Archiver** lets you securely save your messages and recorded calls automatically and easily search the stored data at any time from within your SFTP or Dropbox cloud storage account to quickly retrieve the records.
- **App Gallery** is where you can discover application integrations that are commercially available, and where developers can showcase their integrations.
- **Developer Portal** is a place where you request access to the RingCentral Connect Platform.

Service console

Using the Audit Trail feature

The Audit Trail feature allows the Super Admin or a User assigned with a Billing Admin role to:

- Track the changes on the RingCentral account which can be used for auditing and/or troubleshooting.
- Generate the report with filter options.
- See changes made by other Administrators (applicable to organizations with multiple administrators who need a changelog in order to provide coordinated support).
- Detect failed logins and locked accounts.

Audit Trail captures changes to the following events:

Admin Level Changes:

- **System events:** Successful logins (Service Web only) and Failed login & Locked accounts due to bad passwords (all clients, plus integrations).
- **Phone System**
 - **Company Info:** Company Address, Directory Assistance, Caller ID Name.
 - **Phone numbers:** Company and assigned.
 - **Auto-Receptionist:** General settings.
 - **Phones & Devices:** User Phones, Common area phones, Paging devices, shared lines.
- **Users:**
 - **User list:** Users with extensions and unassigned extensions.
 - **Roles.**
- **Billing:** License purchases, license deletes, upgrades/downgrades.
- **Tools:**
 - **Account Settings:** Custom Fields and Outbound Call Prefix.

User/Extension level changes

- **Settings**
 - **User Name/Ext:** User Details (partial); Phones & Numbers (partial, add/delete number only); Screening, Greeting, & Hold Music; Call Handling & Forwarding, Messages.
 - **Outbound Calls/Faxes:** CallerID and Fax Settings.
 - **Notifications:** Messaging Notifications.

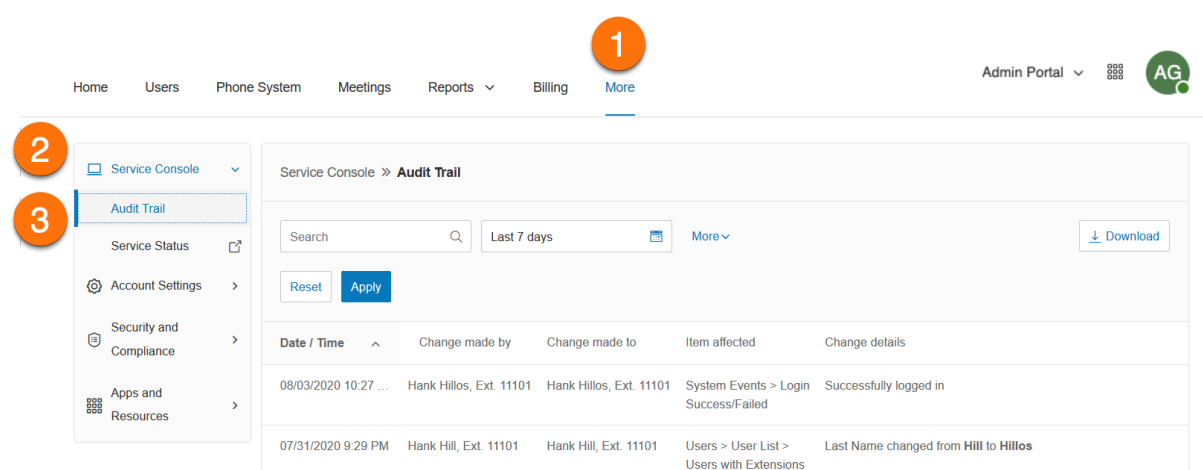
RingCentral app admin settings

- **Administrators:** Administrators added or removed (First Last, Ext.).

- **Company settings:** Enable phone features (on/off); Allow employees to add people (on/off); File sharing (service, on/off), for example Google Drive on/off, Evernote on/off, etc.; Allow Giphy sharing (max rating), for example, Max rating of PG-13.
- **Data Retention:** Policy set to N days.
- **Compliance exports:** Exports (on/off); Request/ download export enabled/disabled for UserName; Download requested by Name/ email.

Accessing the Audit Trail feature

1. Click the **More** tab from the **Admin Portal**.
2. Under **Service Console**, click **Audit Trail**.



Audit Trail report details

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

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

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

Search Capability

You can search records that provide report details by time periods: Today, Yesterday, Last 7 days, Last 30 days, Last 60 days, Last 90 days, and Last 180 days.

The screenshot shows the 'Service Console >> Audit Trail' interface. It features a search bar, a 'Last 30 days' filter, and a 'More ^' dropdown. Below these are buttons for 'All', 'Change by', 'Reset', and 'Apply'. A list of audit trail entries is visible, including dates and times. A calendar overlay is shown, displaying July and August 2020. The calendar has buttons for 'Today', 'Yesterday', 'Last 7 days', 'Last 30 days', 'Last 60 days', 'Last 90 days', and 'Last 180 days'. The calendar grid shows dates from Sunday to Saturday, with some dates highlighted in blue.

Searching by Change

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

The screenshot shows the 'Service Console Audit Trail' interface with filters for 'Change by' and 'Change to'. It includes a search bar, a 'Last 30 days' filter, and a 'More ^' dropdown. Below these are buttons for 'All', 'Change by', 'Change to', and 'Items Affected'. There are also 'Reset' and 'Apply' buttons. The 'Change by' and 'Change to' filters are currently set to 'All'.

Searching by Items Affected

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

Downloading an Audit Trail report

Once you have searched and found information in Audit Trail, you can download an Audit Trail report in .csv format. To download, follow the steps below:

1. Click the **More** tab from the **Admin Portal**.
2. Under **Service Console**, click **Audit Trail**.

3. Do an Audit Trail search.
4. When you would like to generate a CSV file containing the Audit Trail result, click the **Download** button.
5. Click **Download** on the **Confirmation** window.

Note: Audit Trail is available to all tiers of RingCentral MVP accounts and is enabled by default. To disable the feature, [Contact RingCentral Support](#).

The screenshot shows the RingCentral Admin Portal interface. At the top, a navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and **More** (callout 1). The **More** menu is open, showing a list of options: Service Console, Audit Trail (callout 2), Service Status, Account Settings, Security and Compliance, and Apps and Resources. The **Audit Trail** section is active, displaying a search bar, a date range selector set to 'Last 30 days' (callout 3), and a 'More' dropdown. Below these are filters for 'All' items, a 'Change by' dropdown, and a 'Change to' dropdown. A 'Download' button (callout 4) is located in the top right corner of the Audit Trail section. The main content area shows a table with columns: Date / Time, Change made by, Change made to, Item affected, and Change details. The first row of data shows a login event for 'Hank Hillos, Ext. 11101' on '08/03/2020 10:27 ...', with the item affected being 'System Events > Login' and the details being 'Successfully logged in'.

Date / Time	Change made by	Change made to	Item affected	Change details
08/03/2020 10:27 ...	Hank Hillos, Ext. 11101	Hank Hillos, Ext. 11101	System Events > Login	Successfully logged in

Service Status

The RingCentral Service Status site allows admins and users to view any high level service impacting issues on the RingCentral platform with or without logging in. This site allows customers to see by feature and region what is being impacted. It also notifies the admin and users for service impacting issues via email and SMS.

To log in to the Service Status page from the RingCentral online account:

1. Click the **More** tab from the **Admin Portal**.
2. Under **Service Console**, click **Service Status**.

The [Service Status page](#) opens on another window.

RingCentral

Login

Service Status

Core Services

Contact Center

AMERICAS

A portion of RingCentral Contact Center customers may be experiencing intermittent playback issues with Engage QM.

STATUS UPDATE

JULY 21, 2021 22:50:58 GMT-8

RingCentral Contact Center customers may be experiencing screen recording playback issues. Contact Center teams continue to work with a third-party vendor to resolve this issue. The next update for this issue will take place in the morning of 7/23, or sooner if a significant change in status occurs. If you are experiencing this issue, please reach out to RingCentral customer support.

	AMERICAS	EMEA	APAC
⊕ Calling	✓	✓	✓
⊕ Phones	✓	✓	✓
⊕ Meetings	✓	✓	✓
Contact Center	⚠	✓	✓
Messaging	✓	✓	✓
⊕ SMS	✓	✓	✓
⊕ Fax	✓	✓	✓
Connect Platform	✓	✓	✓
Service Portal	✓	✓	✓
Developer Sandbox	✓	✓	✓
⊕ Engage	✓	See more	See more

Account settings

Account linking

Account Linking is a solution that provides a set of features to support customers who are split across different accounts, and allows account users to find one another across accounts on all endpoints. Large customers may have this split because of a limit of number of users per account, or business needs for having different accounts or billing.

Accounts are linked into a federation that includes:

- The ability to create accounts in multiple tiers, allowing for a mix-and-match of certain feature sets
- A consolidated company directory
- Non-metered extension-to-extension and direct number dialing support in the federation

Before setting up Account Federation:

1. Contact RingCentral support to request access to the Account Federation feature. RingCentral support will help evaluate if your account qualifies for the feature.
2. The RingCentral support agent enables the Account Federation feature and adds your linked accounts within your online account.
3. Unique extensions in the federation are preferred. If extensions are not unique, the support agent may be able to update the extension numbers of the linked account for you by applying a template.
4. When the Account Federation setup is complete, all account users can find one another across accounts on all endpoints.

Note: Feature not available for all accounts. Contact RingCentral support to evaluate if your account qualifies for this feature.

Navigating the Appearance tab

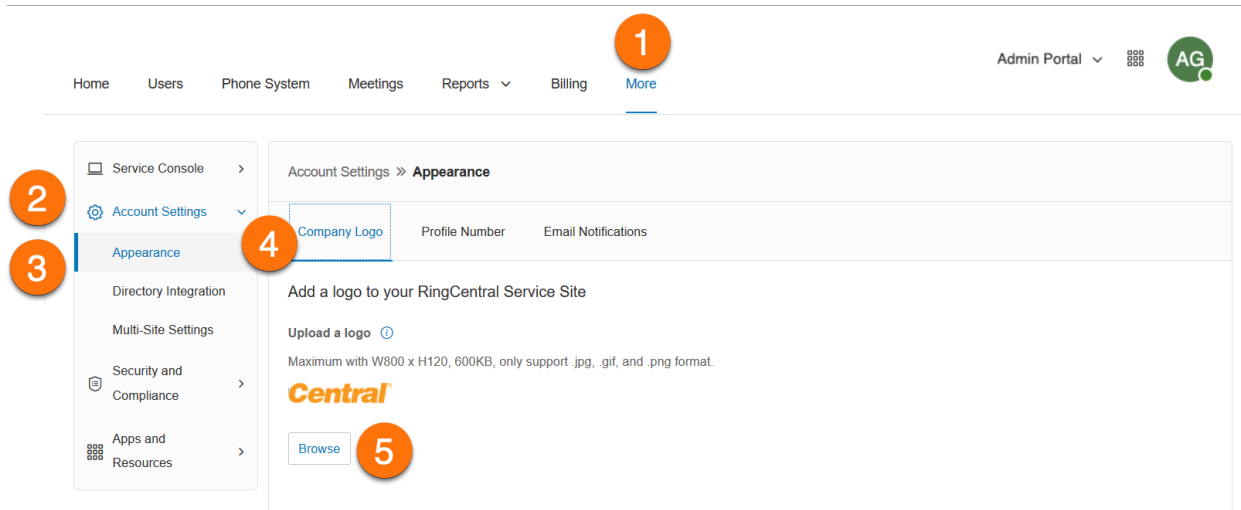
The Appearance tab allows you to add a company logo to your RingCentral account, change the phone numbers the users see in their online account profile, and customize the email notifications that you receive.

Company logo

The company logo will appear at the top-right corner of your online account once you log in. To upload and link an image:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Appearance**.
4. Click **Company Logo**.

5. Click **Browse** to browse your computer for an image to upload and select the file you want to use.
6. Click **Open**.
7. Enter the URL that will be opened when a user clicks on your image.
8. Click **Save**.
9. View your logo in the top-right corner of your online account and test the URL by clicking on the image.



Profile number

In the profile tab, administrators have the option to choose which numbers are displayed on their user's account page.

The number format may differ depending on the country code. If a user does not have a direct number, the main number and extension will be displayed. If a user has multiple numbers, the user can click on the drop-down arrow to view these numbers.

To select the numbers that users will see in their profile:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Appearance**.
4. Click **Profile Number**.
5. Select from the following options:
 - a. **Direct Number and Extension.**
 - b. **Direct Number.**
 - c. **Main Number and Extension.**
 - d. **Direct Number, Main Number, and Extension.**
6. Click **Save**.

Home Users Phone System Meetings Reports Billing **More** Admin Portal AG

Service Console > Account Settings > **Appearance** > Directory Integration > Multi-Site Settings > Security and Compliance > Apps and Resources >

Account Settings >> **Appearance**

Company Logo **Profile Number** Email Notifications

Select the numbers that users will see in their profile

☒ Direct Number and Extension (Current)

☐ Direct Number

☐ Main Number and Extension

☐ Direct Number, Main Number and Extension

Note: Number format may differ depending on the country code. If a user does not have a direct number, the main number and extension will be displayed.

Cancel Save

Customizing welcome email

Whenever an admin creates a user extension, the user receives a welcome email to set up their account. You can customize the email that the user receives and add your information.

To customize the welcome email sent to your new users:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Appearance**.
4. Click **Email Notifications**.
5. You may add the following optional information to your welcome email:
 - a. **Custom Logo**: Enter an image URL to customize the logo that appears in your email headers.
 - b. **Message**: Enter up to 750 characters.
 - c. **Contact Email**: Add your contact email.
 - d. **Support Contact Phone Number**: Add your company support contact phone number.
 - e. **Support Website**: Add your company website.
6. Tick the following checkboxes to add the info to your welcome email:
 - a. Include main company number.
 - b. Include direct number.
 - c. Include RingCentral Support Center information.
7. Click **Update Preview** to see your email preview.
8. Click **Save**.

Note: To set the welcome email back to default, click **Reset to Default**.

1

Home Users Phone System Meetings Reports Billing More

Admin Portal AG

2

3

4

5

6

7

Service Console >

Account Settings >

Appearance

Directory Integration

Multi-Site Settings

Security and Compliance >

Apps and Resources >

Account Settings > Appearance

Company Logo Profile Number Email Notifications

Email Preview

Welcome

Dear new user:

Hank Hill has added you as a user to the RingCentral business phone system.

- Your company number is: (888) 555-1212
- Your extension number is: XXX
- Your direct line is: (XXX) XXX-XXX
- Your email address for login is: XXX.XXX@XXX.XX

You can set up your account online in just a matter of minutes.

[Set Up Account](#)

Or copy-and-paste this link into your browser:

<https://service.ringcentral.com/login/main.asp?FECW1320:C06F19000ED73CC40538B3E8327C04ED7A7FBB84&activation>

Logging in to RingCentral.

From the RingCentral login page, skip everything and click the **Single Sign-on** link. Then log in with your standard company credentials.

Thank you for using RingCentral.

Got Questions? The [RingCentral Support Center](#) offers startup guides, tutorial articles and videos and comprehensive search.

By subscribing to and/or using RingCentral, you acknowledge agreement to our [Terms of Use](#).

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Customize Email Notifications

Custom Logo (optional, max 350px x 60px)

Enter an image URL to customize the logo that appears in your email headers.

Message (optional, max 750 chars)

0/750 characters remaining.

Contact Email (optional)

Support Contact Phone Number (optional)

Support Website (optional)

Customize Welcome Email

☒ Include main company number (409) 240-2563

☒ Include direct number

☒ Include RingCentral Support Center information

[Reset to Default](#) [Cancel](#) [Update Preview](#) [Save](#)

Archiver Settings

Archiver settings let admins and users control archiving independently. Super Admins and managers automatically have Archiver access, and Super Admins can turn on this feature for any user. When a user's Archiver option is turned on, they can archive the data of their own user extension.

Enabling Archiver for Admins

Super Admins and Managers are predefined roles that have admin archiver access by default. Super Admins can create a new custom role with admin-level archiving permissions. They can turn Archiver on for Admins in **Roles** if already available or create a new custom role with Admin level archiving permissions.

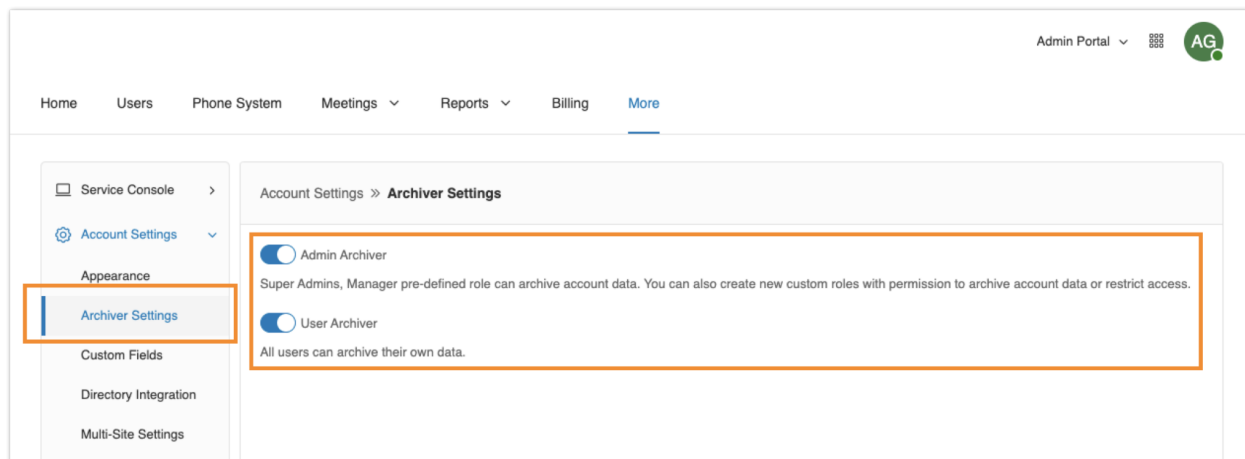
1. Log into your RingCentral account as an admin.
2. Navigate to **Users** via the top bar.
3. Click on **Roles** in the side navigation bar.
4. Click on an existing role or create a new one.
5. Scroll down to the **Features** section and check the box next to **Archiver for Admins**.
6. Click **Save**.

The screenshot shows the 'Create New Role' dialog box with the 'Permissions' tab selected. The dialog has three steps: 'Select Role' (completed), 'Describe Role' (completed), and 'Permissions' (current step). The 'Permissions' section is titled 'Select permissions to be assigned to new role'. It lists several categories with expandable arrows: General, Policies, User Settings, Company Settings, Multi-Sites, Phone System, User Management, Analytics, Billing, and Features. The 'Features' section is expanded, showing a list of features. The 'Archiver For Admins' checkbox is checked and highlighted with an orange box. Other features listed include Audit Trail, Business SMS, and Configure Delegates.

Enabling access for users

Super Admins and Managers can archive data for all; or enable users to archive their own data.

1. Log into your RingCentral account.
2. From the Admin portal (or My Extension for managers), go to **More** from the top navigation tabs.
3. Click on **Archiver Settings** in the left navigation bar.
4. Use the slider to enable archiver.



Directory integration

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

Active Directory

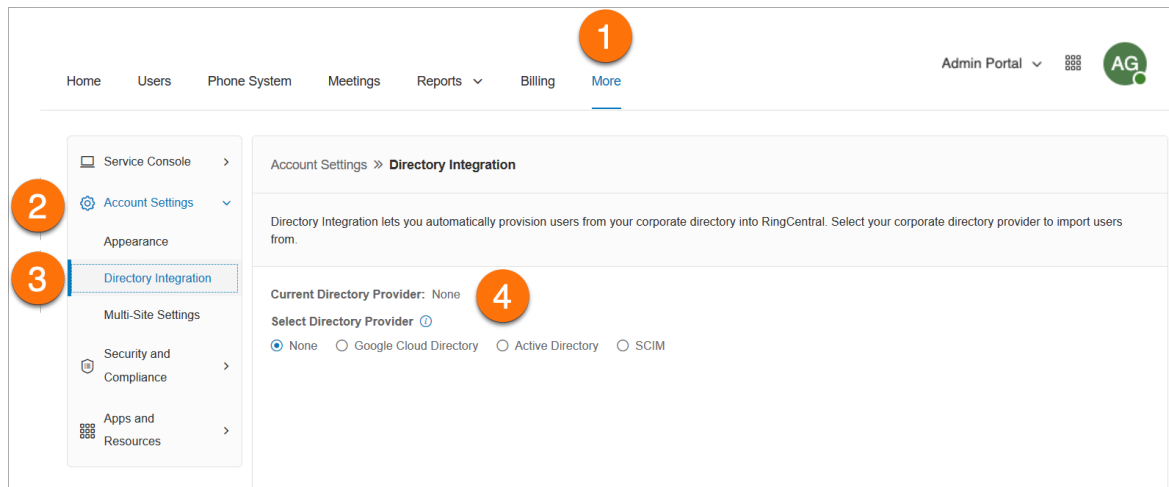
RingCentral integrates with Microsoft Active Directory to let you automatically provision users from Active Directory to RingCentral.

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

To set up the RingCentral directory integration service, follow these steps:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Directory Integration**.
4. Select from the following Directory Provider:

- None
 - Google Cloud Directory
 - Active Directory
 - SCIM
5. Enable your selected directory by following the steps provided.
 6. If required, edit the extensions of provisioned users in User Management in the Admin Portal.



Multi-site settings

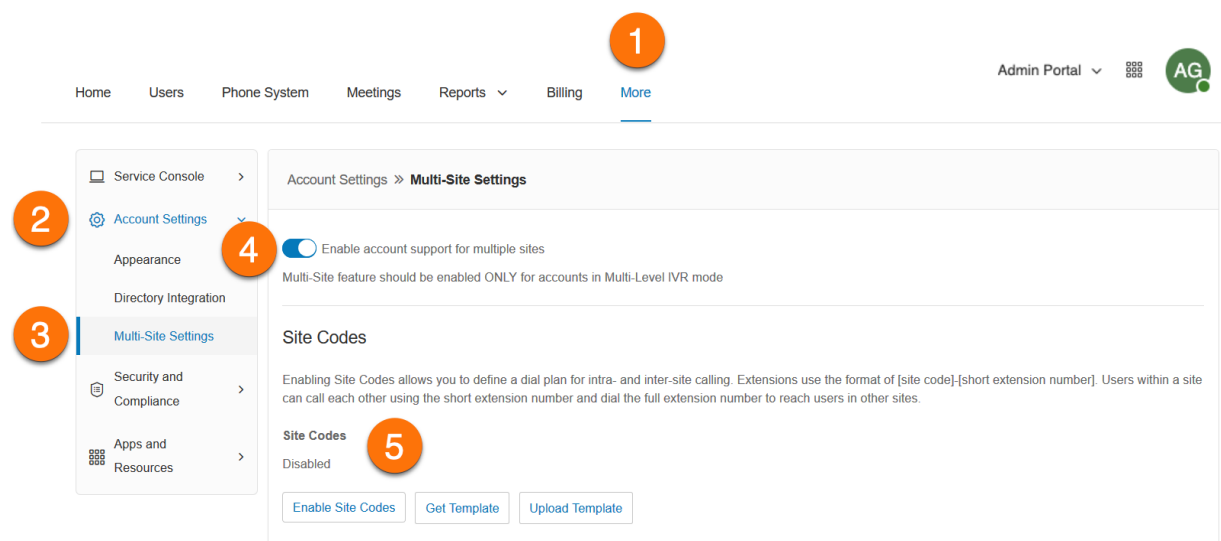
Multi-Site Support provides a management solution for customers with multiple branch locations. Multi-Site Support is available for RingCentral MVP Premium and Ultimate users with Multi-Level IVR enabled. Accounts configured with multi-site support can enable the Site Code feature to define a dial plan for intra-site and inter-site calling. This feature allows the administrator to allocate account user or group extensions for defined sites.

To enable Multi-Level IVR mode, configure the dial-by- name directory, create at least one IVR menu and enable the feature in Auto-Receptionist.

To enable your account to support multiple sites:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Multi-Site Settings**.
4. Toggle the switch on to **Enable account support for multiple sites**.
5. Configure site codes, if required for your dialing plan.

Your online account can now create and configure multiple sites. Site filters are available on pages with site assets to allow you to view the list of assets by sites.



Creating a new site

RingCentral Multi-Site support allows you to provision independent account configurations for your individual sites, to enable you to uniquely register and manage each site from your account. Once Multi-Site Support is enabled, you can create additional sites as needed.

To create a site, follow the steps below:

1. Click the **Phone System** tab from the **Admin Portal**.
2. On the **Company Info** page, click **New Site**.
3. On the **Site Info** page, enter the **Site Name**, **Site Address**, and **Site Extension**. Or, you may click **Select Site** under **Copy Settings from** to copy settings from another site. Click **Next**.
4. Configure the Regional Settings and Business hours. Click **Next**.
5. Assign Numbers to the Site. You may assign existing numbers or add (and purchase) new direct numbers. Click **Next**.
6. On the Caller ID Name page, enter the **Outbound Caller ID Name**.
7. On the IVR Menu page, select an **Existing IVR** or a **New IVR**.

On the Summary page, you will be notified that the site is created successfully. Click **Done**. You can view or edit site information within **Phone System > Company Info**.

The image displays three overlapping screenshots of the 'New Site' configuration wizard in RingCentral, illustrating steps 6, 7, and 8 of the process.

Step 6: Caller ID Name

This screen shows the 'New Site' header with a progress bar indicating steps 1 through 6. The current step is '4 Caller ID Name'. The instructions state: 'This name along with the phone number will be displayed to the called party whenever an outbound call is made using the local number as the caller ID. Max 15 characters. Note: Does not apply to toll-free numbers. Enter the name you want the caller ID to be displayed for this site. If skipped, site's caller ID name will be set to be the same as company's caller ID name.' A text input field labeled 'Outbound Caller ID Name' is provided.

Step 7: IVR Menu

This screen shows the 'New Site' header with a progress bar indicating steps 1 through 7. The current step is '5 IVR Menu'. The instructions state: 'Please assign Existing or New IVR'. There are two tabs: 'Existing IVR' (selected) and 'New IVR'. A search bar is present. Below is a table of existing IVR menus:

Select	Name	Numbers	Ext.	Language
<input type="radio"/>	IVR Menu 1001		1001	English (U.S.)
<input type="radio"/>	IVR Menu 1002		1002	English (U.S.)
<input type="radio"/>	IVR Menu 1003		1003	English (U.S.)

The total count at the bottom left is 'Total: 3'.

Step 8: Summary

This screen shows the 'New Site' header with a progress bar indicating steps 1 through 8. The current step is '6 Summary'. The message states: 'The new site is created successfully. You can now create or assign users, phone numbers and devices to the site. Site information can be viewed and edited later within Phone System > Company'. A 'Done' button is located at the bottom right.

Setting up site codes

Accounts configured with multi-site support can enable the Site Code feature to define a dial plan for intra-site and inter-site calling. This allows users within a site to call each other using a short extension number, and users between sites to use a full extension number, consisting of a site code plus the short extension.

To set up your site codes:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Multi-Site Settings**.
3. Verify that Multi-Site support is enabled.
4. Under **Site Codes**, click **Enable Site Codes**.
5. In the **Extension Number Length** window, select an appropriate digit length for the short extension and the site code. The values must fall within the limits of the full extension number length, per the maximum extension length of five digits.* Click **Next**.
6. In the **Provision Site Codes** window, the system will suggest site codes for all sites, per selected lengths for site code and short extension. Click **Next**.
7. In the **Adjust Extension Numbers** window, Existing extensions that have more digits than enabled with site code need to be adjusted or use system suggestions. Click **Confirm**.

Extensions in the **Users with Extensions** view display a site code plus a short extension. For example: Site Code: 11, Short Ext. #: 001, and Full-Ext #: 11001.

Note: A maximum extension length of six to eight digits is available on-demand for certain international cases.

The screenshot illustrates the process of enabling Multi-Site Settings and configuring Site Codes in the RingCentral Admin Portal. The steps are numbered 1 through 7.

Step 1: The Admin Portal navigation bar is shown with the 'More' link highlighted.

Step 2: The 'Account Settings' menu is expanded, and 'Multi-Site Settings' is selected.

Step 3: The 'Multi-Site Settings' page is shown. The 'Enable account support for multiple sites' toggle is turned on. Below it, the 'Site Codes' section is visible, indicating that Site Codes are currently disabled.

Step 4: The 'Enable Site Codes' button is clicked.

Step 5: The 'Site Codes' configuration modal is shown. The 'Extension Number Length' is set to 5. The 'Site Code Length' is set to 2. The 'Short Extension Number Length' is set to 3. The 'Next' button is clicked.

Step 6: The 'Site Codes' configuration modal is shown. The 'Provision Site Codes' step is active. A table lists the sites and their associated Site Codes and extension numbers.

Site Name	Site Code	Short Site Ext. Number	Full Site Ext. Number
Company	11		
Office	12	0	12000

Step 7: The 'Site Codes' configuration modal is shown. The 'Adjust Extension Numbers' step is active. A table lists the extensions and their associated Site Codes and extension numbers.

Ext. Name	Target Site	Site Code	Ext. Number with Site ...	Type of Conflict	New Short Ext. ...	New Full Ext. ...
IVR Menu 1001	Company	11	111001		3	11003
IVR Menu 1002	Company	11	111002		4	11004
IVR Menu 1003	Company	11	111003		5	11005

Moving assets across sites

The Change Site function of Multi-Site Support allows you to move selected Users, IVR Menus, and Call Queues to another site. This feature allows for individual or bulk movement of Users, IVR Menus, and Call Queues between sites.

Moving users across sites

1. Click the **Users** tab from the **Admin Portal**.
2. On the **Users with Extensions** tab, check the box of the users you want to assign to a different site, and click **Change Site**.
3. Select the site.
4. You may check the option to **Adjust time and regional settings to the settings of the new site?** to apply it to the moved users.
5. Click **Change Site**.

The screenshot displays the RingCentral Admin Portal interface. The sidebar on the left has the **Users** tab selected, indicated by a red circle with the number 1. The main content area shows the **Users with Extensions** tab. A table lists users with columns for Status, Name, Number, Ext., Roles, Department, Site, Msg., and Actions. The user **Joe Hall** is selected, indicated by a red circle with the number 2. The **Change Site** button in the Actions column is highlighted. A modal dialog titled **Select Site** is open, showing a search bar and a list of sites: **Company** (selected) and **Office**. A red circle with the number 3 highlights the **Company** selection. Below the site list, there is a checkbox labeled **Adjust time and regional settings to the settings of the new site?**, which is checked, highlighted by a red circle with the number 4. The **Change Site** button at the bottom right of the modal is highlighted with a red circle with the number 5. The modal also shows a total of 2 users and a 'Show' dropdown set to 25.

Moving IVR menus across sites

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto Receptionist**.
3. Click **IVR Menus**.
4. Select from the list of IVR Menus.
5. Click **Change Site**.
6. Select the site.
7. Click **Change Site**.

The screenshot illustrates the process of moving an IVR menu across sites in the RingCentral Admin Portal. The interface is divided into a left sidebar and a main content area.

Step 1: The **Phone System** tab is selected in the top navigation bar.

Step 2: The **Auto-Receptionist** option is selected in the left sidebar.

Step 3: The **IVR Menus** option is selected in the left sidebar.

Step 4: The **Change Site** button is clicked for the selected IVR menu.

Step 5: The **Select Site** dialog box is displayed, showing a list of available sites. The **Company** site is selected.

Step 6: The **Change Site** button is clicked in the dialog box.

Step 7: The **Change Site** button is clicked in the main content area.

The main content area displays a table of IVR Menus with columns: Name, Numbers, Ext., Language, Site, and Actions. The table lists three IVR Menus: **IVR Menu 1001**, **IVR Menu 1002**, and **IVR Menu 1003**. The **IVR Menu 1003** is selected.

The **Select Site** dialog box includes a search bar, a list of sites (Company, Office), and a **Change Site** button.

Moving call queues across sites

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select the Call Queues that you want to move.
5. Click **Change Site**.
6. You may check the option to **Adjust time and regional settings to the settings of the new site?** to apply it to the moved Call Queue.
7. Click **Change Site**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (selected), 'Meetings', 'Reports', 'Billing', and 'More'. The right side shows 'Admin Portal' and a user profile 'AG'. The left sidebar contains 'Company Info', 'Phone Numbers', 'Auto-Receptionist', 'Groups' (selected), 'Call Queues' (selected), 'Paging Only', 'Shared Lines', and 'Park Locations'. The main content area is titled 'Groups > Call Queues' and includes a description, a search bar, a 'Sites' dropdown, and a '+ New Call Queue' button. Below this is a 'Change Site' link and a table of call queues.

	Status	Name	Site	Numbers	Ext.	Msg.	Members Availability	Actions
<input checked="" type="checkbox"/>	✓	Call Queue Test	Company		11001	0 / 0	1 / 0	Change Site More
<input type="checkbox"/>	✓	Call Queues Test Two	Company		11002	0 / 0	1 / 0	Change Site More

Security and compliance

Single sign-on

Single Sign-on allows employees in a company to access multiple applications with one set of credentials. You can work with RingCentral Customer Support to set up Single Sign-on for your RingCentral services, or you can set it up by yourself.

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

RingCentral also integrates with Google SSO, which allows G Suite customers to use the Google SSO service (offered as part of G Suite IDaaS) to sign into RingCentral. Google lists RingCentral as an approved SSO app in their SAML apps catalog. You configure RingCentral for SSO in the G Suite Admin Console and configure the RingCentral SSO as described here.

Configuring SSO

1. Click the **More** tab from the **Admin Portal**.
2. On the left-hand side, click **Security and Compliance**.
3. Click **Single Sign-on**.
4. Choose an option to set up SSO:
 - **Set up SSO by yourself:** Use the self-service UI to configure the Service Provider (SP) settings. Perform the steps in Set up Single Sign-On by Yourself .
 - **Contact Customer Support:** Use RingCentral Customer Support to configure the Service Provider (SP) settings. Click the **View Detail** link, and contact RingCentral support.
5. After configuring the SSO, you can turn on the SSO service for your company. To do so, check the box next to **Enable SSO Service**.

Home Users Phone System Meetings Reports Billing More

Admin Portal AG

Service Console

Audit Trail

Service Status

Account Settings

Security and Compliance

Single Sign-on

Session Timeout

Hot Desk Session Timeout

Masked Numbers

Trust Portal

Apps and Resources

Security and Compliance >> Single Sign-on

RingCentral Single Sign-on (SSO) service lets your company authenticate your RingCentral users through your company-level network login credentials.

About RingCentral SSO service. [View guide](#)

For the first time setup, please finish the configuration in order to turn on SSO for your company.

SSO Configuration

Choose one of the options below to set up SSO for your company.

Set up SSO by yourself

Step 1: Upload identity provider metadata file and certificate.

[Set Up](#)

Step 2: Export Service Provider metadata and import it into your Federation Server. Please use <https://sso.ringcentral.com> as your Audience URI and SP entity ID when it's requested by your federation server.

[Download](#)

Contact Customer Support

[Customer support number](#)

Contact RingCentral customer support to set up SSO

[View Detail](#)

Enable SSO

Please finish the configuration in order to turn on SSO for your company.

☐ Enable SSO Service

Identity Provider Entity ID

SSO unique ID

None

None

Save

Setting up single sign-on by yourself

To set up SSO by yourself, upload your Identity Provider (IDP) SAML metadata, make sure the attribute is mapped correctly, and download the metadata for importing it into your Federation Server:

1. In the Set up SSO by yourself box, click **Set Up** to set up SSO for the first time, or **Edit** to change your configuration.
2. Under Upload IDP metadata, click drop down and select either Upload with file or URL. To upload with a file, click **Browse**, select a file, and click **Open**. To upload with a URL, paste the URL and click **Import**.
3. Select email attributes you want to use within your metadata from the drop down list under **Map Email Attribute to**. If the email attribute is not recognized, type out the name of the attribute by clicking Custom in dropdown.
4. Under **Certificate Management**, click **Upload** to upload a certificate and set the primary one. Click **Save**.
5. Download the Service Provider metadata and import it into your IDP server to complete the configuration on your IDP side.
6. Tick **Enable SSO Service** checkbox.
7. Click **Save**.

SSO Configuration

Choose one of the options below to set up SSO for your company.

Set up SSO by yourself

Step 1: Upload identity provider metadata file and certificate.

1 Set Up

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

5 Download

2

Upload IDP metadata

Please upload a valid SAML metadata file.

Upload Metadata by

Upload with file

Browse

SSO General Information

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

3

Attribute Mapping

Please make sure the email attribute is mapped to the correct value in the metadata.

Map Email Attribute to

None

4

Certificate Management

Please upload certificate and set the primary one.

Upload

Order	Subject DN	Signature Algorithm	Expires
No result. Please upload metadata file first.			

Cancel Save

6

Enable SSO

☒ Enable SSO Service

Identity Provider Entity ID

http://www.okta.com/tgeuighTGEfjd

☐ Allow users to log in with SSO or RingCentral credential

SSO unique ID

Email

7

Save

Contacting support to enable SSO

This section describes how to prepare the request, and contact RingCentral Customer Support to configure the Service Provider (SP) settings required to enable SSO on your IDP server:

1. In the Contact Customer Support box click the **View Detail** link, and perform the steps as described.
2. Get your SAML 2.0 metadata details from your Identity Provider (IDP), such as PingFederate, Okta, or a homegrown IDP.
3. Contact [RingCentral Customer Support](#) to request Single Sign-on setup assistance. A support member will ask for your SAML 2.0 metadata file and answer your Single Sign-On questions.
4. You will receive an email from RingCentral containing your SAML 2.0 SP metadata. Import the metadata into your IDP server to complete the configuration on your IDP.
5. Check **Enable SSO Service**.
6. Click **Save**.

SSO Configuration

Choose one of the options below to set up SSO for your company.

Set up SSO by yourself

Step 1: Upload identity provider metadata file and certificate.

[Set Up](#)

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

[Download](#)

Contact Customer Support

Customer support number

Contacting RingCentral customer support to set up SSO

[View Detail](#)

Contact Support to Enable SSO

Please follow the steps below for the request.

2 Step 1. Prepare IDP SAML 2.0 metadata

To set up SSO, we need your SAML 2.0 metadata details from an Identity Provider (IDP), like PingFederate, Okta, or a homegrown IDP.

SAML 2.0 Reference

Sample SAML 2.0 metadata

3 Step 2. Call RingCentral Customer Support

Call RingCentral Customer Support and request Single Sign-on setup assistance.

A Support member will ask for your SAML 2.0 metadata file and answer your Single Sign-on questions.

Find your RingCentral customer support number

4 Step 3. Import SAML 2.0 Service Provider (SP) metadata

You will receive an email from RingCentral Customer Support containing SAML 2.0 SP metadata. You need to import this data into your Federation Server.

[OK](#)

Enable SSO

☒ Enable SSO Service

Identity Provider Entity ID

<http://www.okta.com/fgeuighrTGEfjdn>

SSO unique ID

Email

☐ Allow users to log in with SSO or RingCentral credential

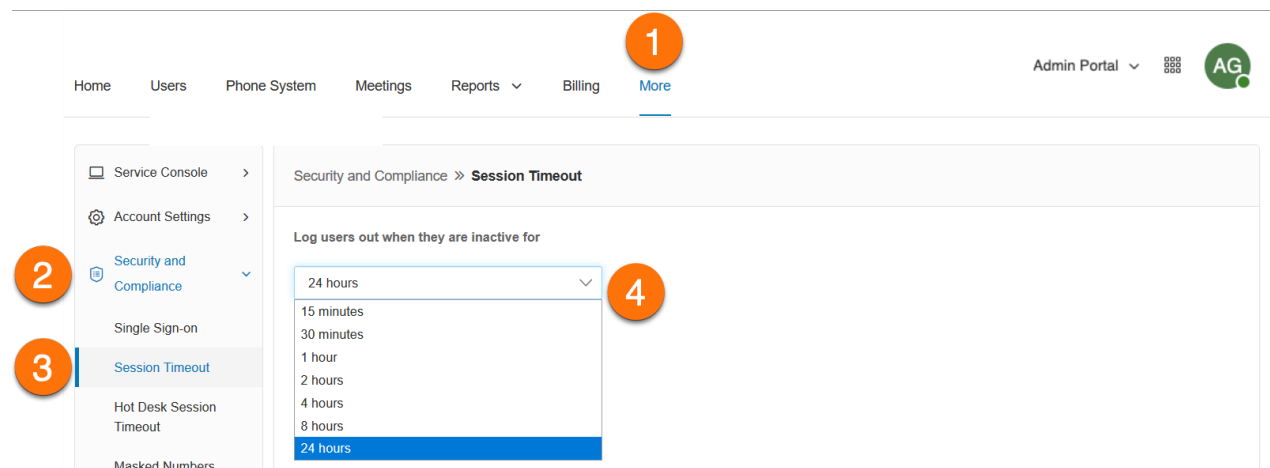
[Save](#)

Configuring session timeout

Configure a session timeout for all users on your account. If a user is inactive for a certain period of time, a warning message will appear notifying the user that the session is about to expire. The user can click **OK** to keep the session alive. However, if a user does not click **OK** before the time runs out, the user is logged out of the system and is asked to log in again.

To set a time interval for your phone system's session timeout:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Security and Compliance**.
3. Click **Session Timeout**.
4. Click the drop-down to view a list of time intervals.
5. Select the time interval you would like to use.
6. Click **Save**.

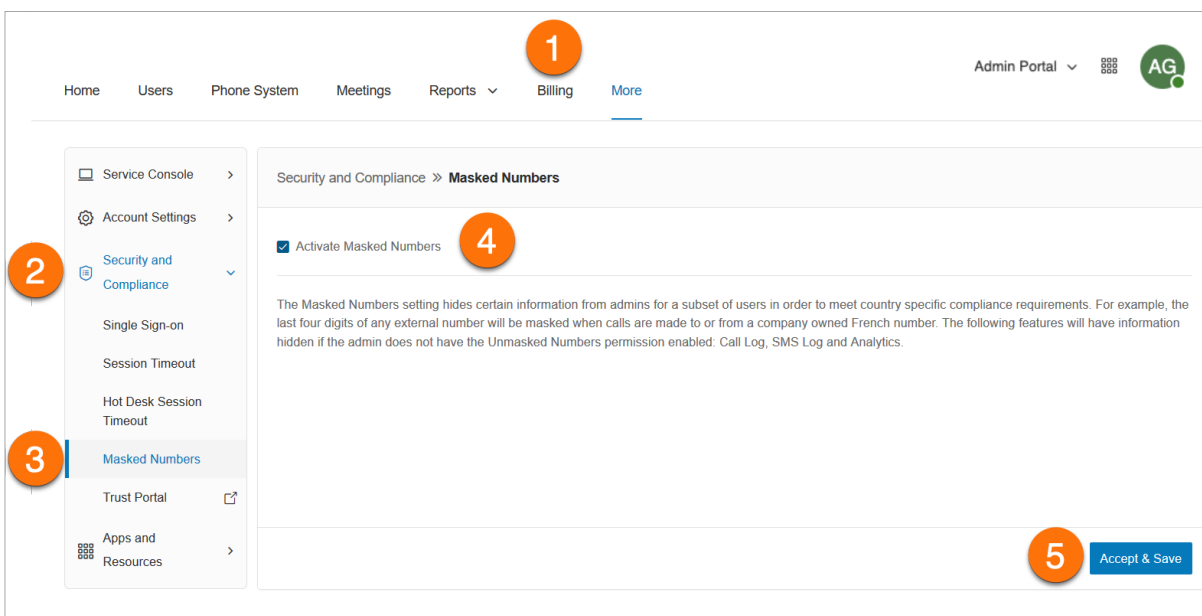


Enabling masked numbers

The Masked Numbers setting hides certain information from Administrators for a subset of users in order to meet country-specific compliance requirements. This feature needs to be activated first before the Unmasked Numbers permission can be accessed in Roles. Administrators with the Super Admin role will automatically have the Unmasked Numbers permission enabled.

To enable Masked Numbers:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Security and Compliance**.
3. Click **Masked Numbers**.
4. Check **Activate Masked Numbers**.
5. Click **Accept & Save**.
6. Click **OK** on the **Alert** dialog.
7. At this point, you can either create a role with the Unmasked Numbers permission enabled, or you can enable the Unmasked Numbers for a role.

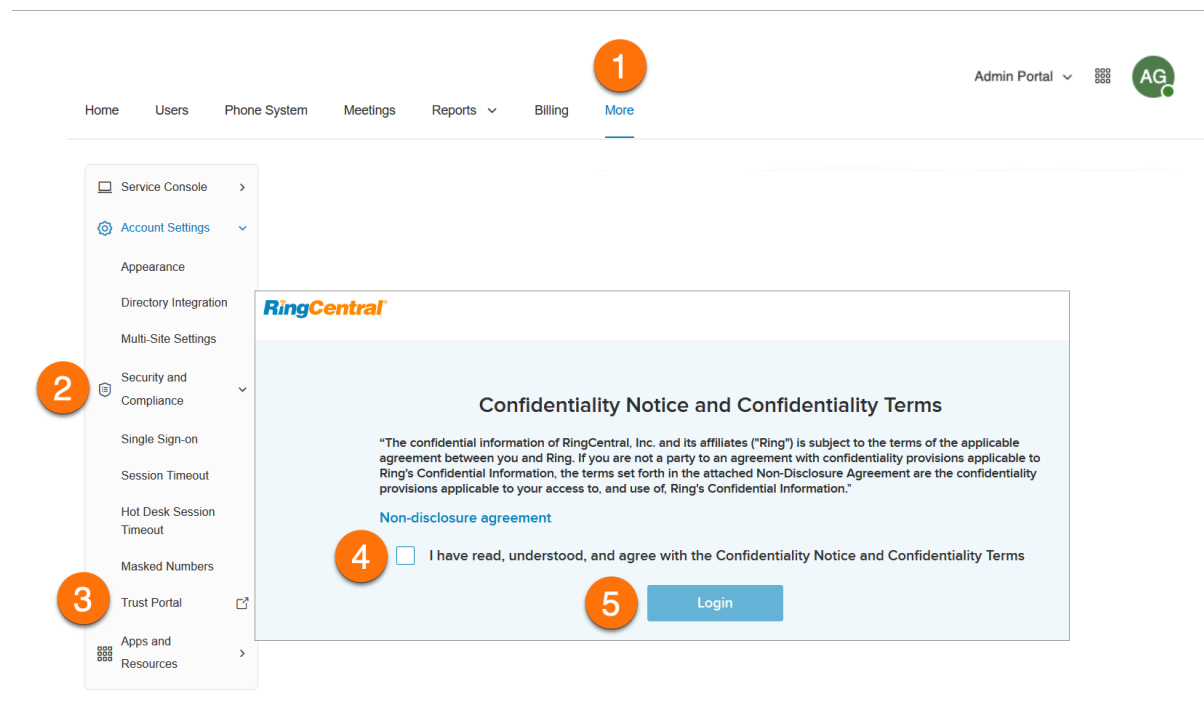


Accessing the Trust Portal

All current RingCentral MVP, RingCentral Contact Center, and data center compliance and security documentation will be accessible via the portal. For questions, please contact your Account Manager or Sales Representative.

To access the Trust Portal:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Security and Compliance**.
3. Click **Trust Portal**.
4. Accept the terms, then click **Login**.
5. Click the report name to view or download the PDF.



Apps and resources

Archiver

The RingCentral Archiver allows you to backup RingCentral data via Dropbox, SFTP, Google Drive, and Box integration. This provides an automatic backup solution, as well as a convenient way of storing and retrieving phone data.

To configure Archiver:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Apps and Resources**.
3. Click **Archiver Beta**.
4. Connect RingCentral Archiver to one of the following:
 - a. Dropbox
 - b. SFTP
 - c. Google Drive
 - d. Box
 - e. Smarsh

Note: You can only connect to one storage per instance. For example, one cannot use Dropbox and Google Drive at the same time

5. Click **Sync Options**.
6. When connected to the archiver account, you can enable or disable data backup by selecting **Enable Backup**.
7. 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.

Note: Archiver is available to RingCentral MVP Premium and Ultimate customers. It is also available to RingCentral customers in Canada, UK, and Europe.

The screenshot displays the RingCentral Admin Portal interface. At the top, a navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More (1). The 'More' link is highlighted. In the top right corner, there is an 'Admin Portal' dropdown and a user profile icon labeled 'AG'.

A left-hand sidebar (2) contains a list of navigation items: Service Console, Account Settings, Security and Compliance, Apps and Resources (3), Archiver Beta, App Gallery, and Developer Portal. The 'Apps and Resources' item is expanded, and 'Archiver Beta' is selected.

The main content area is titled 'Apps and Resources » Archiver Beta' (4). It features three tabs: 'Accounts', 'Sync Options', and 'Phone'. The 'Accounts' tab is active, showing a 'Select Account To Connect' section with a list of services: Dropbox, SFTP, Google Drive, and Box. Each service is marked as 'Not connected' and has a 'Connect' button.

Below the 'Accounts' tab, the 'Sync Options' tab (5) is active, showing a 'Data to backup' section (6). This section includes a list of backup options: Call Recordings, Voice Mails, SMS, and FAX, each with a checked checkbox. A '7' callout points to the 'SMS' checkbox. To the right of this list is a toggle switch labeled 'Enable Backup'.

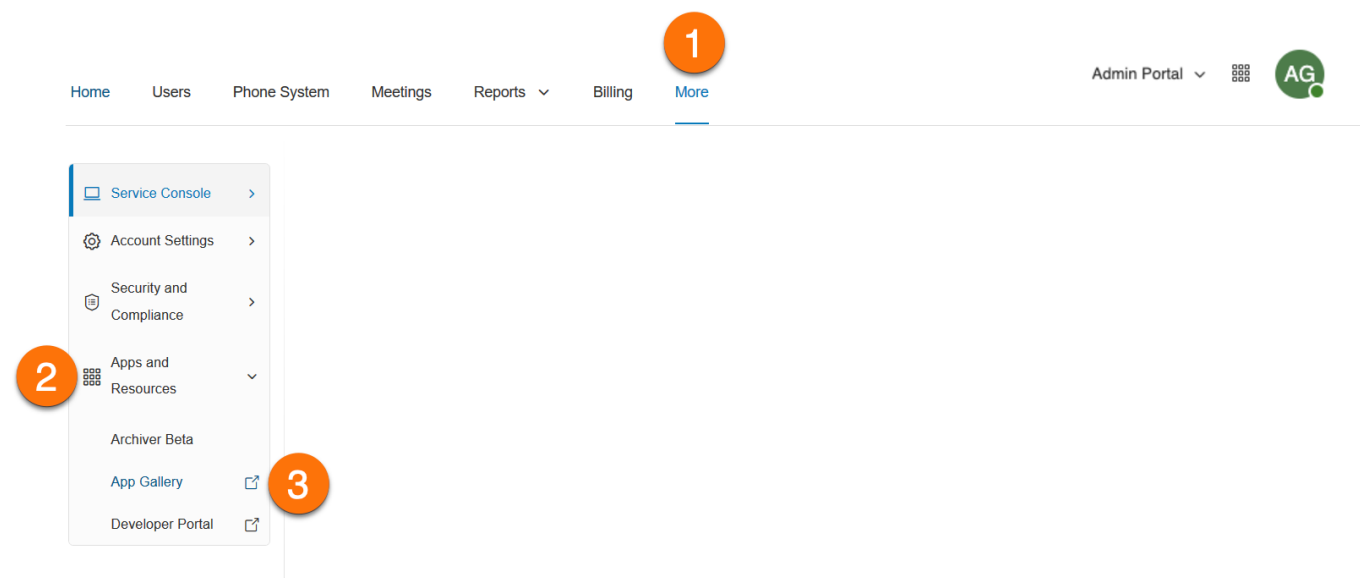
App Gallery

The App Gallery is a destination where you can discover application integrations that are commercially available, and where developers can showcase their integrations.

To access the App Gallery via the online account:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Apps and Resources**.
3. Click **App Gallery**.

A new window will open to the [RingCentral App Gallery](#) website.



Developer Portal

The RingCentral Developer Portal offers a set of tools and services to build, deploy, and manage custom integrations using RingCentral APIs. With this, developers can build out-of-the-box integrations with RingCentral to add powerful communication capabilities to business applications.

To access the Developer Portal via the RingCentral online account:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Apps and Resources**.
3. Click **Developer Portal**.
4. A new window will open to the [Developer Portal](#).

SMS and MMS

There are two types of SMS:

- **Person-to-Person (P2P) or standard SMS:** Communication of two or more people over text messaging. Sending text messages from your phone to another person's phone is an example of P2P.
- **Application-to-Person (A2P) or High Volume SMS:** A text message that a person receives from an application. This includes, but not limited to, marketing messages, appointment reminders, chat bots, virtual assistants, notifications, and one-time passwords (OTPs), or PIN codes.

Wireless carriers treat P2P and A2P differently in terms of the type and volume of traffic allowed.

Standard SMS and MMS

RingCentral MVP enables you to send SMS and MMS messages a few different ways.

Business SMS and MMS

The RingCentral Business SMS and MMS feature allows you to send and receive text messages and multimedia files with your business number. This feature is available for customers in the US and Canada (SMS only in Canada) and automatically activated for RingCentral MVP users.

RingCentral also supports toll-free number SMS activation for US and Canada. [Contact Support](#) to process this request.

You can use your RingCentral phone numbers for sending and receiving text messages via the RingCentral app.

Group SMS

You can send a text message to several people (up to 10) at once via the RingCentral app. This will create a text conversation with all parties.

RingCentral app currently supports group text messaging only to numbers from the US, Canada, and Puerto Rico.

Sending a group SMS

1. Click on the **New actions** plus button at the top right.
2. Select **Send new text** from the dropdown menu.

3. If you have several Direct Numbers or Digital Lines, click inside the **Text from** field and select your preferred outbound caller ID.
4. Enter the names (from your contact list) or phone numbers of the people you'd like to text in the **To** field (you can enter up to 10). Separate the numbers by a comma or semicolon.
5. Ensure the **Create group text** box is checked.
6. Click the **Next** button to navigate to the text message conversation.
7. Draft a message in the message field at the bottom of the app.
8. Send the text message by pressing Enter or Return on your keyboard.

Bulk SMS

You can send the same message in bulk (up to 100 recipients) via the RingCentral app. Different from a group message, sending a text message in bulk means sending the same message to multiple people in separate messages.

Sending a bulk SMS

1. Click on the **New actions** plus button at top right.
2. Select *Send new text* from the dropdown menu.
3. If you have several Direct Numbers or Digital Lines, click inside the **Text from** field and select the outbound Caller ID from which you'd like the text to come.
4. Enter a list of the names or phone numbers of the people you'd like to text in the **To** field.
5. Uncheck the **Create group text** box, so you can add more than 10 numbers/names (you can enter up to 100).
6. Enter your message in the resulting text field. Attach files and insert emojis using the **Attach file** and **Emoji** buttons (respectively).
7. Click the **Send** button to send the text message to all contacts provided.

High Volume SMS

Send targeted or bulk SMS campaigns using our [programmatic API](#) or [ready-to-use app](#) with a full communications platform, deep insights, and the ability to ensure regulatory compliance.

With High Volume SMS, customers can send SMS at higher rates, send mass promotions, send automated messages, appointment reminders, notifications, and more without having their messages blocked by the carriers as long as they don't contain shortened URLs or spam content.

High Volume SMS features

Whether you're sending promos for e-commerce, healthcare appointments, reminders in education, chatbots in hospitality or anything in between, High Volume SMS provides functionality for all industries and businesses of any size.

- up to 250,000 text messages per day
- automated message queuing
- opt-out/opt-in handling
- detailed reporting and error codes

API vs High Volume SMS app

The High Volume SMS API is configured for customers who require more sophisticated functionality and want to build more customized workflows for their organizations. Our developers can review code samples and start building your custom SMS app. To learn more, visit our [API Reference Guide](#).

Availability and pricing

RingCentral MVP Standard with \$50 MRR+ (Monthly Recurring Revenue), Premium, or Ultimate plans can take advantage of High Volume SMS. Local (10-DLC) and toll-free numbers are supported in the United States. Only Toll-free numbers are currently supported in Canada. High Volume SMS is priced at \$0.007 per message sent or received with no additional carrier fees, all on your RingCentral bill.

Getting Started

You must first enable your RingCentral number to send High Volume SMS. To do so, submit a request via the enrollment form.

Note: If you use an existing RingCentral number, you can no longer use it for SMS across other products, including the RingCentral app. Visit the RingCentral Service Desk or contact your RingCentral account manager if you'd like to add another number to your account.