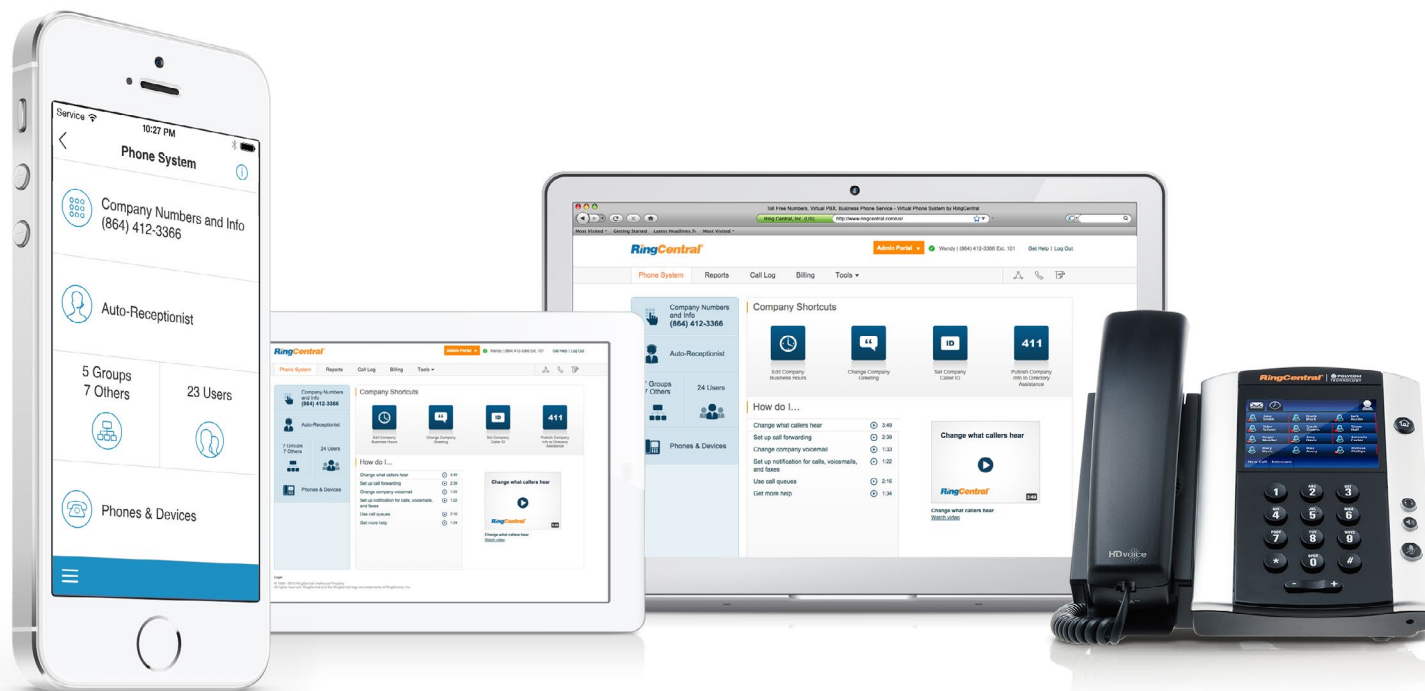# Customer Onboarding Guide

How to successfully set up your service
100+ users

Overview

Welcome

Thank you for choosing RingCentral as your phone system provider. This guide is designed to give you the information and tools you need to get started, and set your expectations of what's to come in the setup process.

Onboarding Process

| NETWORK READINESS | IMPLEMENTATION | NUMBER TRANSFER | PRODUCT FEATURES | ADDITIONAL RESOURCES | VOICE OF THE CUSTOMER |

- **Network Readiness**

  Learn about network readiness and system requirements.

- **Implementation Process**

  View a checklist of steps in the implementation process.

- **Number Transfer Process**

  Transfer an existing number to your RingCentral service.

- **Product Features**

  Learn about powerful features in your account and how to use them.

- **Additional Resources**

  Learn about Customer Support, RingCentral Community, and more.

- **Voice of the Customer Program**

  Tell us about your RingCentral experience.

3 Tips to Prevent Implementation Roadblocks & Delays:

1. **Ensure someone is available to accept your FedEx shipment of phone orders.**
   Your phones should arrive in 1–5 business days.

2. **Make sure your network is ready.** Review the Network Readiness Steps to Success. Verify that your network meets the minimum recommended requirements prior to your implementation date.

3. **Ensure that you (and any other points of contact) are available for your implementation appointments.**

RingCentral®

Network Readiness
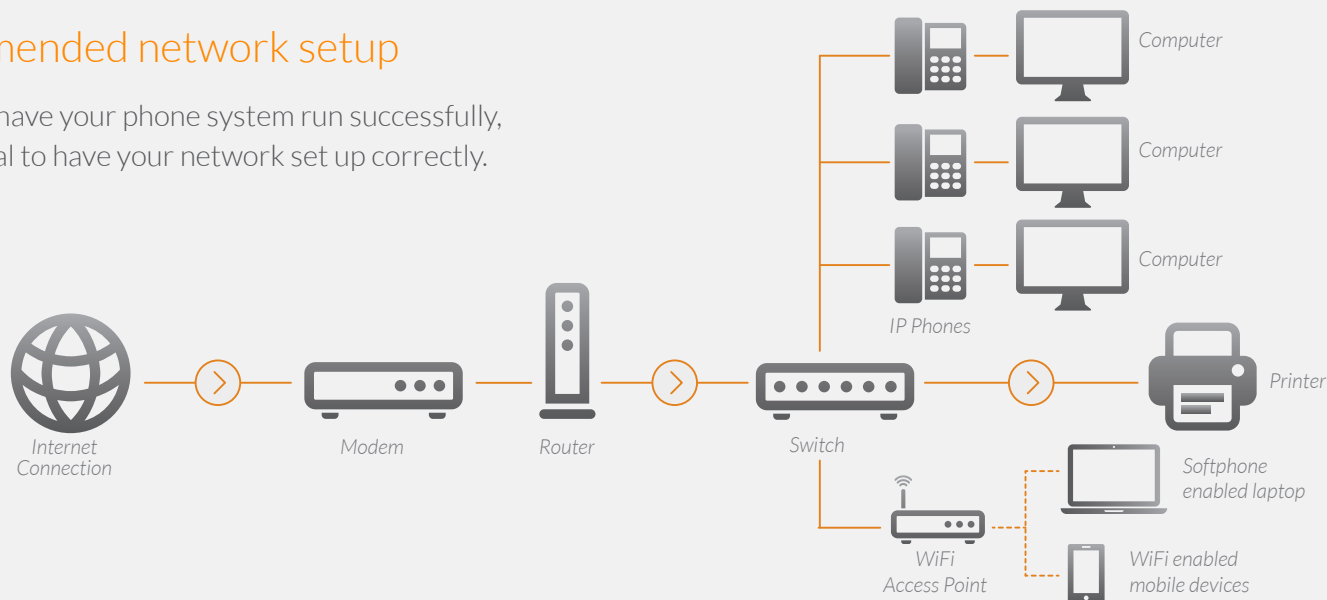
Get your network RingCentral ready!

Go from zero to voice quickly and easily. Learn the basics of how VoIP-ready networks are set up and follow the steps to get yours ready for great calls.

Introduction to networking for VoIP

• RingCentral provides reliable, high-quality voice service. Your local network plays a big part in your call quality.

• Since RingCentral is a cloud phone system, there is relatively little that you need on site. The pieces are: high-speed internet access, proper configuration of your network components, and good cabling to your phones.

Recommended network setup

In order to have your phone system run successfully, it is essential to have your network set up correctly.

Computer

Computer

Computer

IP Phones

Internet Connection

Modem

Router

Switch

Printer

WiFi Access Point

Softphone enabled laptop

WiFi enabled mobile devices

Your network components

Internet connectivity: Test your internet connection bandwidth

If you are switching to VoIP you will likely need additional bandwidth to handle the data flow for voice. To handle voice you will need roughly 84 KB for each concurrent call.

Rule of thumb: To determine concurrent calls for typical installations is to use half the total number of phones on your local network. For example, if you have 20 phones, you should plan for capacity to support 10 concurrent calls or 10 X 84 KB = 840 KB additional upstream and downstream capacity.

To evaluate your local network, use the following tests to make sure that your Internet has enough capacity to deliver high-quality calls

- Capacity Test
- VoIP Quality Test

Learn more about VoIP QoS here.

Configure your modem

If you are using a cable modem/router combination, verify that it is in IP pass-through or bridge mode. You will also need to add a router to your local network. Note: Contact your service provider for instructions.

Buy and configure router and firewall

You should use a router that supports QoS. (RingCentral provides a list of recommended routers.) The most reliable approach is to find your router on the list and configure it according to the included instructions. (You may have to purchase a router.)

If you are going to use a different router with built-in firewall, make sure that you have turned ALG off, configured it for QoS with VoIP prioritization, and port forwarding.

Firewall: While many routers have firewalls built in, you may have a separate one. If you have a separate firewall, configure it for port triggering as described here. Refer to your firewall documentation for configuration details.

Using switches

VoIP prioritization: Any switches that carry VoIP traffic should be set to prioritize voice. Refer to your switch documentation for configuration instructions.

IPower over Ethernet (PoE): If you plan to run power to the phones over the network cable, make sure that your switch has sufficient power capacity for the number of phones you plan to run on that switch. To do this, check the output power rating on your switch (usually written right on the switch) and add up the power consumption on each of the phones that you want to run from the switch. If the power consumption on the phones is greater than the power output on the switch, you'll need to either add another PoE switch or use power supplies for the phones.

Cabling

For best results, phones should be connected by cat 5 Ethernet cable to your VoIP-configured router or switch. If your local network is more than five years old, or you did not set it up, you should get a cabling or electrical contractor to test it for you to verify that you have cat 5 with good connection from end to end.

Plugging in phones

Connect your phones and workstations: When you have your network set up, connect your phones to the Ethernet and then connect your workstations to the phones. This will ensure that activity on a workstation does not interfere with the voice quality of a phone call.

Wi-fi

If you have people in your office who will make and take calls using the RingCentral for Desktop or mobile application over Wi-fi, you need to configure your wireless access points to prioritize voice and media traffic. Refer to your access point documentation. Bear in mind that Wi-fi can be inconsistent depending on the location of the person with respect to the access point. RingCentral does not recommend use of Wi-fi desk phones.

RingCentral®

Network Readiness

Getting help with network readiness

If you need help configuring or setting up the computer network at your location, we recommend you get local help. Search "**Computer Networking in [Your Town]**."

If you have call quality issues, gather this information to help us help you.

What symptoms are you experiencing?

- Choppy sound
- Dropped calls
- Static
- One way audio or no audio

When did it happen?

- Date and time of the call
- To and from information

You can create a case at http://success.ringcentral.com or talk to your Implementation Advisor.

System requirements

For Windows® 7 (or later):

- 1 GHz (32-bit) or 2 GHz (64-bit) processor
- Minimum of 512 MB of RAM
- 200 MB of hard drive space

For Mac OS X® 10.7 Lion (or later):

- Intel® processor
- Minimum of 512 MB of RAM
- 100 MB of hard drive space

Service status site

Although rare, if you're noticing a service disruption to your account or are simply feeling curious, you can get more information from the site at servicestatus.ringcentral.com.

RingCentral®

Implementation Process

Implementation overview

RingCentral offers implementation services to get your account up and running. We'll walk you through the physical setup of your phones and help you configure the settings for each of your employees. Implementation services are free of charge to RingCentral Office accounts with two or more users.

The process may take up to 30 days depending on your readiness and the complexity of your needs.

Your success team

The following RingCentral contacts are here to assist you throughout the implementation process:

- **Professional Service Advisor:** Your Professional Service Advisor meets with you over the phone to provide training, and helps you successfully set up your account

- **Account Executive:** Your Account Executive provides assistance for product and pricing information.

Implementation process

1 **Welcome call.**
- Discuss project timeline.
- Establish basic expectations for timeframe and responsibilities.
- Discuss network requirements.

2 **Upload user information.**
Your Professional Service Advisor will help you upload all user information to the RingCentral system. Please have a list of the following handy:
- User names, extension numbers, extension names, email addresses, and E911 addresses.

3 **Attend Training Session #1 (1 hour).**
Your first training session covers the following:
- Review Scope of Work.
- Review your account setup, features, and required user information.
- Confirmation of the data provided in your network information sheet.

4 **Attend Training Session #2 & #3 (1 hour per session).**
Your second and third training sessions cover the following:
- Check milestone progress.
- Confirm and review advanced rules, call handling.
- Review the number transfer process.

5 **Attend optional administrative training session.**
This final administrative training session will review any outstanding items or help you with specific needs.

6 **Attend optional end-user training process.**
This optional training to your users can be set up with your Professional Service Advisor.

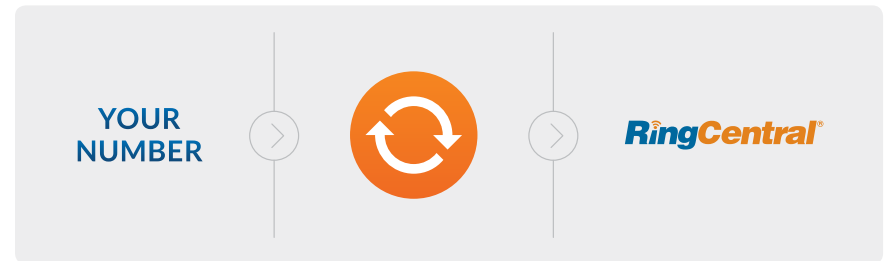# Number Transfer Process

Transfer your existing number

You can transfer your number from your previous provider to your RingCentral account.

Transfer process:

1 Submit a <u>transfer request online</u> from your RingCentral account.*

The information you enter must match exactly what's on record with your current phone service provider.

2 Follow the instructions on the screen in your online account.

3 RingCentral will send your transfer request to your current service provider.

4 Set up your greetings, answering rules, etc. for your RingCentral account.

You can make and receive calls (if part of your service plan) on your temporary RingCentral phone numbers until the transfer is complete.

5 RingCentral will notify you by email when your transfer has been accepted and confirmed.

Please note, if Business SMS texting capabilities are available with your service plan, activation could take up to five additional business days after your number is transferred.

*If you are requesting transfer of 100 or more numbers to RingCentral, please email <u>project.porting@ringcentral.com</u> for additional support.

YOUR NUMBER → ↻ → **RingCentral®**

Number transfer do's and don'ts

DO be exact.

Your information must match exactly what's on record with your current phone service provider. If the information provided does not match, your transfer will be delayed. Refer to your current bill or contact your current service provider.

DO remove special features.

Call your current provider and cancel special features (such as remote call forwarding, distinctive ring) before submitting your transfer request. Cancel special features only, not the entire service.

DO cancel any open pending service orders.

Contact your current provider to cancel any open service orders or confirm they're complete before placing the transfer request.

DON'T cancel your old phone service.

Wait until after your transfer is complete to cancel your old service.

DON'T lose your DSL service.

Call your service provider to get a new phone number for your DSL line before you submit your transfer request. Otherwise, you risk losing your DSL service.

RingCentral®

Number Transfer Process

Number transfer checklist

Here are a few items you'll need to have in order to begin the number transfer process:

A recent phone bill

Must be a current bill less than 30 days old.

Your service address

This is the address where your phone will ring. This may or may not be the same as your billing address.

Company name

The name as it appears with your current service provider.

Your main billing number (BTN)

This number can be found on your phone bill.

Phone numbers

A list of the phone numbers you will be transferring.

Authorized end-user information

This is the person who is authorized to make changes to the account with your current provider.

Your account number and PIN

This is the account number and PIN for your current account.

(Not all accounts require this. Please check with your current service provider.)

If you have any questions, please email ntd@ringcentral.com

Common terms

The following terms come up frequently during the number transfer process:

Letter of Authorization: A document that gives RingCentral permission to transfer your number.

Main billing number: The primary phone number that is used for billing.

Pending service orders: Changes to your phone service that haven't gone through yet. They could be requests to add or remove special features or modify your company name or billing address.

Service address: The address where your phone rings.

Special features: Additional features you can order for your phone service, such as Centrex, remote call forwarding, or distinctive ring.

Hot topics

The links below address common questions that arise during the number transfer process:

- Number Transfer Frequently Asked Questions
- How to Start a Number Transfer Request
- How to Speed Up the Number Transfer Process
- How to Check the Status of a Number Transfer Request

RingCentral®

Product Features

Your RingCentral Office account includes powerful features that make it easy for you to communicate with colleagues and clients. The following chart highlights the features provided with each product.

	Standard Edition	Premium Edition	Enterprise Edition
Mobile Apps Take your business anywhere with the RingCentral mobile app. Download for iPhone, iPad and Android.	✔	✔	✔
RingCentral for Desktop Turn your desktop to a comprehensive communication system. Download for Mac and Windows.	✔	✔	✔
Internet Fax Send faxes from a range of sources and devices.	✔	✔	✔
Business SMS Send and receive texts with your iPhone or Android smartphone, tablet and PC.	✔	✔	✔
Audio Conferencing With RingCentral Conferencing, set up and join conference calls anywhere, anytime.	✔	✔	✔
Glip Work together with team messaging, file sharing, task management, and group calendars.	✔	✔	✔
Available Integrations Bring your RingCentral phone system to the applications you use every day.		✔	✔
Automatic Call Recording Automatically record both incoming and outgoing calls for yourself and your employees.		✔	✔
RingCentral Meetings Cloud-based video conferencing service that unifies HD video conferencing, mobility, and web meetings together.	4 participants	25 participants	50 participants

RingCentral®

Additional Resources

Customer Care Center

The RingCentral Customer Care Center includes search capabilities, a Learning Center with step-by-step videos, how-to articles, and the ability to submit a case. Easily find the answers you need:

- **Powerful search capabilities:**
  Get answers to your questions from our online Knowledge Base with hundreds of articles on key topics.

- **Learning Center:**
  Find step-by-step videos and how-to articles to help you get going.

- **Case submissions:**
  Open a case submission online for real-time support.

Ask the community

Get the answers you need and exchange product knowledge in the RingCentral Online Community, where you have access to the latest support information.

The community is available 7 days a week and contains over 1,000 discussion topics and is growing every day. You can ask questions, answer them, share new ideas, access training material, and learn more about products.
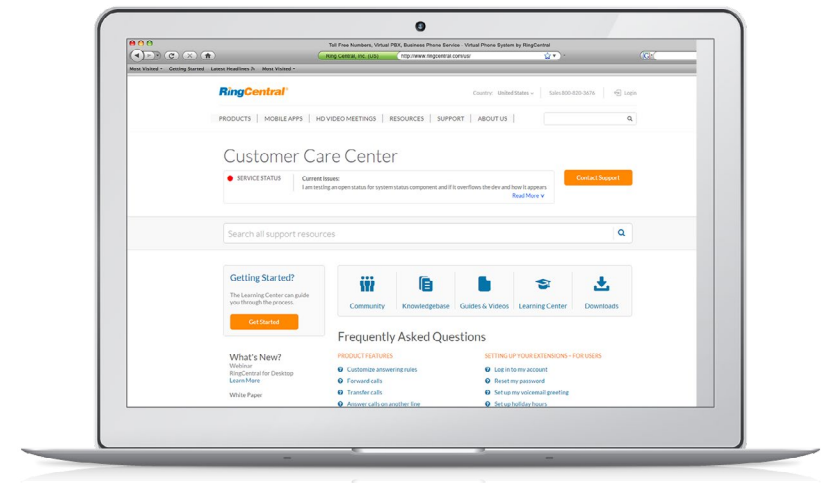
Connect with our developer platform

The RingCentral Connect Platform offers a family of cloud APIs and SDKs that integrates voice, SMS, and fax communications, and provides access to communications data.

Customer success webinars

Attend one of our monthly webinars to learn how to get the most out of RingCentral. Be sure to invite your users too! Register now.

RingCentral®

Voice of the Customer Program

RingCentral is dedicated to delivering a world-class experience to our customers, and your feedback is critical to that end. From time to time, you may receive short surveys to provide feedback about your Sales and Support interactions. We also conduct three-month and bi-yearly customer experience surveys to ensure that we are meeting your expectations.

Your candid response about our products and services are used to ensure we are meeting your business needs. We are committed to investing in improvements that positively impact the customer experience.

Rest assured, your feedback is heard and valued at RingCentral.

KID-2838 11/15