# RingCentral Phone Desktop App™

User Guide





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# Welcome

RingCentral Phone turns your PC or Mac computer into an all-in-one communication hub completely synced to your office network so you can collaborate with your colleagues and clients anywhere you have a broadband connection and a headset.

With RingCentral Phone, you're ready to communicate as soon as you log in to your computer, no matter where you are. RingCentral Phone combines the call handling power you expect from your desk phone with the collaboration tools you rely on most—like texting, conferencing, and faxing—so you can stay productive with fewer devices to worry about. RingCentral Phone is easy to install and even easier to use. We'll show you how.



## What's New

#### International SMS

Enables customers to send international SMS messages. Enables customers to send/receive international SMS from non-international numbers. *For US and Canada only*. Contact your account representative for availability. See "International SMS" on page 31.

#### **New Global Office Countries**

Global Office will extend into two new countries: Hungary and Croatia.

## **System Stability and Performance**

Improvements have been made in this release to provide better stability and performance. These improvements help to prevent a single device failure from affecting the system.

In some circumstances, the user may be warned that a logout in VoIP only mode is undesirable.

## **Delete Specific Call Log Records**

The Call Log edit mode now supports the individual deletion of call log records. This restores previously removed capability. See "View Your Call Activity Records" on page 36.

## **Kerberos Support on Windows**

Computer network authentication using Kerberos in your SSO is now available for Windows platforms.



# **Supported Languages**

The following languages are supported by RingCentral from release 10.0. The user interface in applications and online account reflect the regional settings.

- English (US)
- English (UK)
- English (Australia)
- French
- French (Canada)
- German
- Italian
- Japanese
- Portuguese (Brazilian)
- Spanish

## Set the Language

Select new languages in the Regional Settings menu.

## **Fax Templates**

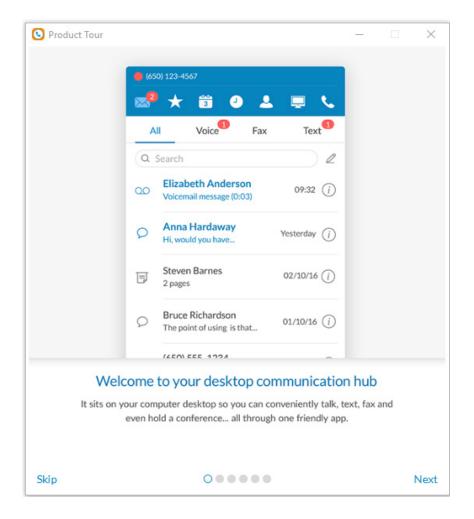
Fax templates for added languages are available.

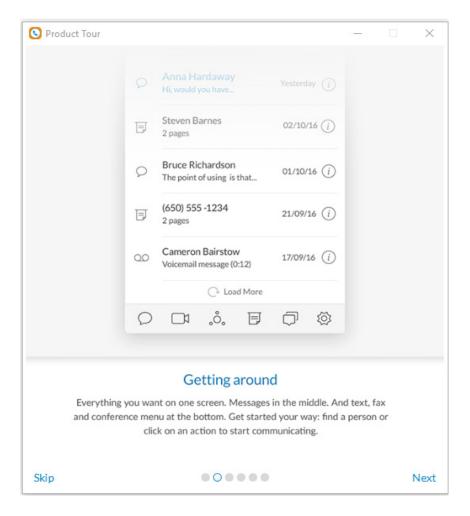
- Fax templates do not support non-ASCII characters.
- Older Cisco and some Polycom (VVX101/VVX201) models may not display non-ASCII characters properly on devices.
- Characters might display improperly when using intercom and page.

Note: Japanese and Brazilian Portuguese have not been integrated into Q365, SFDC, Zendesk, MS Dynamics, Global c2D, or Microsoft Outlook.



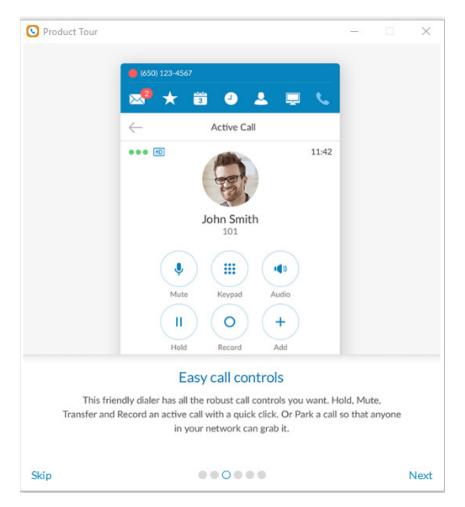
# **Product Tour**

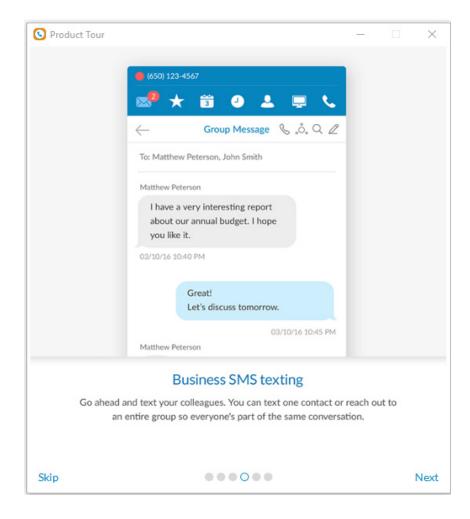






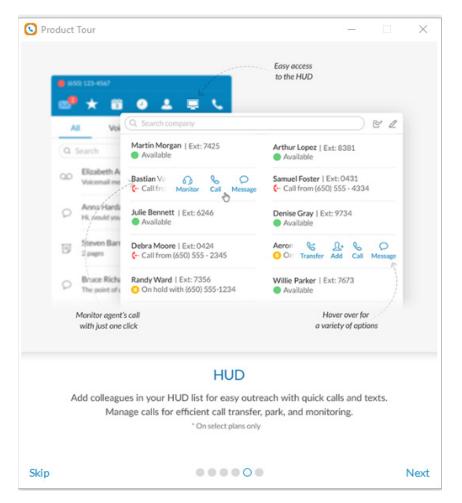
## **Product Tour (continued)**

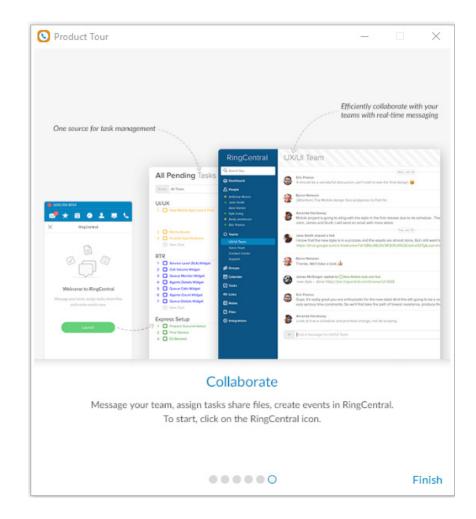






## **Product Tour (continued)**







# Download and Install the App

It's quick and easy to get RingCentral Phone installed on your computer. Before you start, check the system requirements to ensure that your computer can use RingCentral Phone.

To download and install RingCentral Phone:

- 1. Log into your RingCentral online account.
- 2. Go to the Tools menu and select RingCentral Phone.
- 3. Download the version of the app compatible with your computer, either PC or Mac.
- 4. Run the install wizard.

Now you're ready to log into RingCentral Phone.

#### **System Requirements**

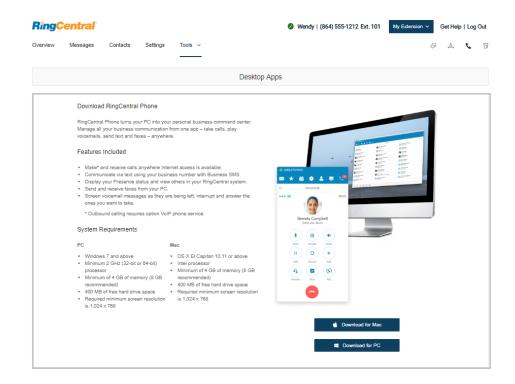
Your computer needs the following minimum requirements to best use RingCentral Phone:

#### PC

- Windows 7 (or later)
- 2 GHz (32-bit or 64-bit) processor
- Minimum 4 GB RAM (8 GB recommended)
- 400 MB free hard drive space
- Required minimum screen resolution is 1,024 x 768

#### Mac

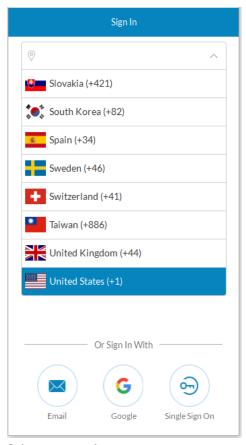
- Mac OS X® 10.11 El Capitan (or later)
- Intel processor
- Minimum 4 GB of memory (8 GB recommended)
- 400 MB hard drive space
- Required minimum screen resolution is 1,024 x 768





# Log in to RingCentral Phone

1. Click on your computer desktop.



Select your region

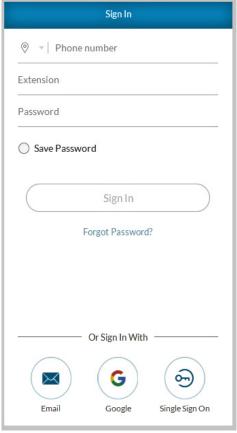
2. Click Log in. Or, click Single Sign On and log in with your credentials to access RingCentral Phone and all of your company applications with a single sign on. Learn more about Single Sign On here Learn about logging in to RingCentral Global Office on page 12.

Sign In

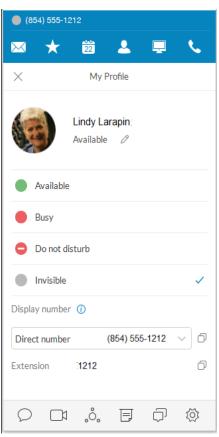
Phone number

O(854) 555-1212

My Profile



Enter phone & password and click Sign In

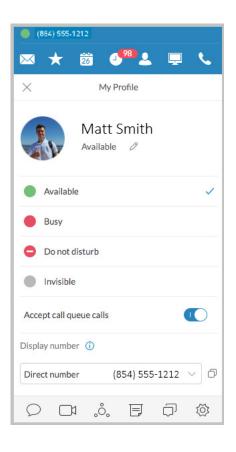


Your profile appears.

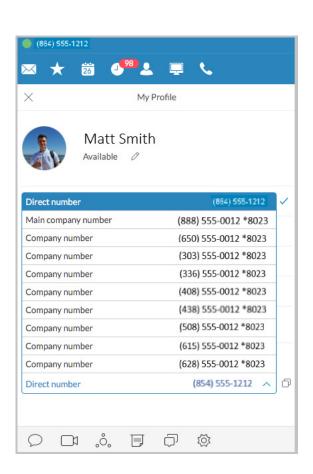


## Set Your Default Number

When you launch RingCentral Phone, the application shows your default phone number. You have the choice of displaying your direct number or company number. Select your direct number or your company number following these steps:



- 1. Click on your phone number at the top to open your profile.
- 2. Click Direct Number.
- 3. Select the number from the menu you would like to display as your direct number.

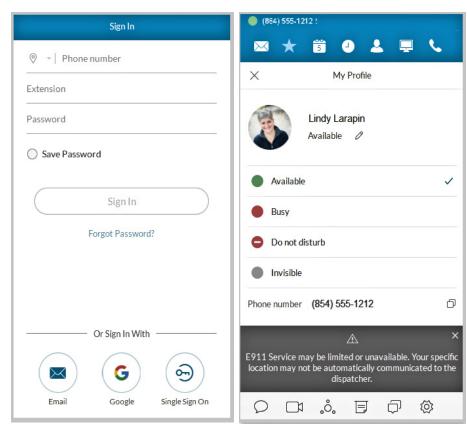




# RingCentral Global Office Support

Global Office Support simplifies and consolidates the management of the phone system across all international branch offices into one account, thereby reducing the cost of IT management and reducing international calling charges. RingCentral Global Office Support is available in Australia, Austria, Belgium, Canada, Czech Republic, Croatia, Denmark, Finland, France, Germany, Hong Kong, Hungary, Ireland, Israel, Italy, Luxembourg, Mexico, Netherlands, Norway, Portugal, Singapore, Spain, Sweden, Switzerland, Taiwan, United Kingdom and United States. International number formatting for each country is supported.

Global Office Support increases the efficiency of office-to-office communications with free extension-to-extension dialing. It provides Instant activation of extensions with international numbers directly from the number pool, and comprehensive billing and service summaries divided by calling zones. Outbound calls with competitive in-region dial plans are supported across all end points, including mobile and desktop apps. Learn more about the benefits of RingCentral Global Office Support here.

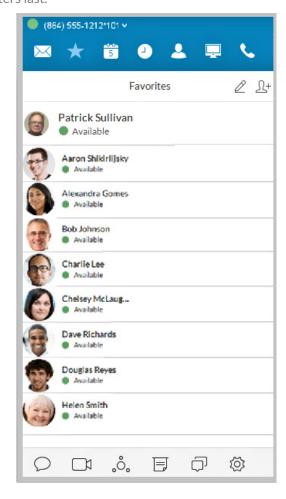




## **Favorites**

RingCentral Phone opens to the Favorites screen the first time you log in, and displays icons linked to everything else you want all on one screen. You can add a favorite from your list of contacts by clicking + and selecting from your All, Company, Personal, or Outlook contacts lists using this filter . You can also choose from OSX or Google contacts. Mouse over a name (for example, Dave Richards) to reveal your contact options—Call or Text. Here's a quick rundown on how to get around RingCentral Phone. Note: Contacts and Favorites are now sorted by letters first, numbers next, and special /Unicode characters last. Unicode characters last.

Office plans.



(864) 555-1212*101 Vour account presence. Set your availability status.				
$\searrow$	Messages. View all your messages in one place. Messages are always current and synced from your other devices.			
$\star$	<b>Favorites.</b> Add colleagues you contact often. See their Presence status and contact them directly from this screen.			
30	Calendar. Google Calendar or Outlook. ICal if you are using a Mac.			
•	Call Log. Review all call activity on your account.			
•	<b>Contacts.</b> Separate Personal and Company contact lists make it easy to quickly find the right person.			
	<b>Head Up Display.</b> Provides a single interface to manage incoming calls from the desktop; views presence status of up to 100 users.			
4	<b>Dial pad.</b> Dial a phone number to make calls from this screen.*			
0	SMS text messaging. Send text messages to one person or a group.**			
	Online Meetings. Launch Online Meetings to collaborate and share screens with remote colleagues or clients.			
°°,	<b>Audio Conference.</b> Hold instant conference calls and easily invite up to seven participants. **			
	<b>Fax.</b> Send faxes, schedule faxes, and select cover pages from this screen.			
	RingCentral App. Collaborate and share files with your team members.			
(Q)	Settings. Set your app preferences.			
* Professional customers require a purchased number for making outbound				
calls from the app.  ** SMS, Online Meetings, and Audio Conference are available on selected				



# Contacts: Add or Update Your Contacts List

The **Contacts** list is your online address book. It stores your Company contacts—everyone in your corporate directory—and your Personal contacts—everyone else outside of the company, such as friends, family, and even vendors. Your personal contact list is clearly separated from your company contact list so there's never any confusion when you're looking for the person you want to contact.

#### **View Your Contacts**

At the top of the screen, click to open your contacts. Click the Filter icon  $\overline{Y}$  to select All, Company, Personal, or Outlook contacts. Click on a contact (Adrian Yang in this example) to see its Presence status.

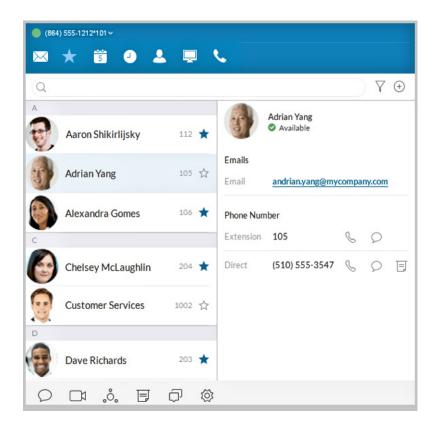
#### **Updating Your Contacts List**

Good news! There's no need to manually update your Company contacts. Your corporate directory is synced to your company's main RingCentral account and continually updated so you always have the latest contact information for your entire company.

# Did you know?

You can call or text your contact directly from your Contacts list. Just click the name of the person you want; then click any one of these icons:

- To call, click
- To text, click





## Favorites: Create a List of Favorite Contacts

The Favorites screen is a shortcut to your most frequently used contacts. You can add up to 100 contacts from your Personal list or Company list. Since it's a shorter list, you can find the person you want faster.

Additionally, when you add a Company contact in your Favorites list, you can see their phone Presence status. This status shows whether the person is available to take calls. Presence status is available only from your Favorites list and available only for Company contacts.

#### **View Your Favorites List**

At the top of the screen click . The Favorites screen opens, showing all of your existing favorite contacts.

#### Make a Contact a Favorite

- 1. At the top of the screen, click or  $\Omega^+$ .
- 2. Click  $\overline{Y}$  and select **Personal** or **Company**.
- 3. Click the name you want to add to your Favorites list.

Click ☆ next to the name. When the open star changes to a filled star ★. Your contact was successfully added to your Favorites list.

# Did you know?

You can call or text your contact directly from your Favorites list. Just click the name of the person you want; then click any one of these icons:

- To call, click
- To text, click

## **Google Contacts Integration**

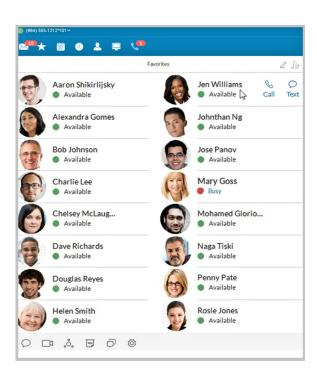
View your Google contacts from inside RingCentral Phone or select and move Google contacts one at a time.

#### Remove a Favorite Contact

- 1. At the top of the screen, click . All your existing Favorites are shown.
- 2. Click \( \text{2} \) at the top right of the screen.
- 3. Find the person you want to remove and click in next to the name.



The contact is removed from the screen, but you can still find them in your Personal or Company list.





#### **View Presence Status of a Favorite Contact**

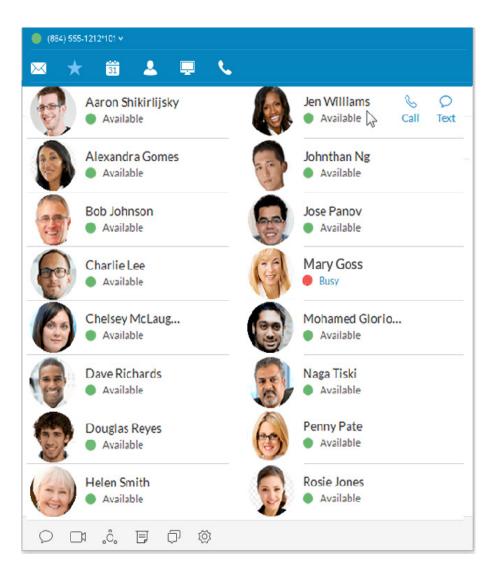
The Presence status lets you know if one of your Company contacts is available to take a call or not. Presence status can only be shown on your Favorites screen so you can't see Presence status from your Company contact list.

#### To view Presence status:

- 1. At the top of the screen, click . All of your existing Favorites are shown.
- 2. Look under the contact: name



- A green dot ( ) means the person is available. Go ahead and give them a call.
- A red dot ( ) means the person is busy, often already on a call.
- A red dot with a white bar ( ) means Do Not Disturb.
- A gray dot ( ) means the person is invisible (off-line).





# Adding a Photo Avatar to any Contact

RingCentral Phone seamlessly integrates with Microsoft Outlook and Mac Address Book so you can easily import contacts into your Desktop contacts. If there are pictures in these contacts, the photos will display in your Contacts list.

When you have a lot of contacts, sometimes it's easier to recognize the contact you want when you have a visual hint to jog your memory. RingCentral Phone lets you upload any photo or graphic to use as an avatar, which displays next to the name of the contact. For example, you can upload a photo of the person or an image file, like a logo or animal, to represent the person to you.

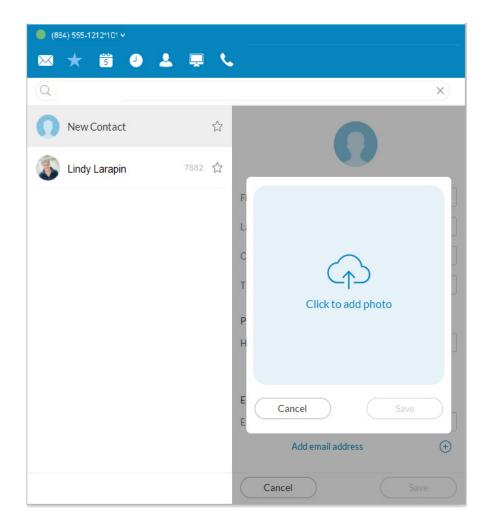
The avatar is visible only to you, while you're using RingCentral Phone. Any image you use won't be seen by the person you've contacted. This is different from a profile image you might have used to display publicly. This avatar is for your personal recognition use only.\*

#### Add an Avatar

- 1. At the top of the screen, click
- 2. Click the filter icon  $\overline{Y}$  and select All, Company, Personal, or Outlook.
- 3. Click the name of the contact which you want to assign an avatar.
- 4. Click next to the name. The Add Photo screen opens.
- 5. Click to add photo. Find the image file you want to use.
- 6. Click Save. You should now see the uploaded image next to the contact name.

Note: Your personal profile image will be synced across RingCentral Cloud, desktop and mobile applications. Your profile image in company contacts will also be synced to the RingCentral Phone application.

However, your newly added photo will not automatically replace the one for you that was manually added earlier by your contacts. Cloud contacts added locally do not affect Favorites from external sources such as MS Outlook and OS X contacts.





# **Updating Your Personal Contacts List**

Your personal contacts may already be synced to your mobile phone or Microsoft Outlook, but you can also manually add, edit, or remove a Personal contact at any time.

#### Add a Contact

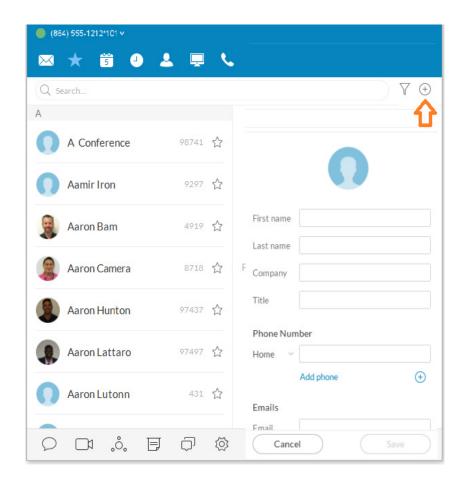
- 1. At the top of the screen, click ...
- 2. Click the filter and select **Personal**.
- 3. Click (+) at the top right corner to open the Add Contact screen.
- 4. Fill in any of the information fields you want, such as name, email address, and a phone number or two. You can always come back and add more details later.
- 5. Click **Save**. The page refreshes and displays a summary of the contact details.
- 6. Click ← to return to the full list of Personal contacts.

#### **Edit a Contact**

- 1. At the top of the screen, click
- Click the Personal tab.
- 3. Click the name you want to edit.
- 4. On the Contact Details screen, click // at the top right of the screen.
- 5. Make the changes you want to any of the contact details.
- 6. Click Save.

#### Delete a Contact

- 1. At the top of the screen, click 4.
- Click the Personal tab.
- 3. Click the name you want to remove.
- On the Contact Details screen, click //.
- 5. Click Delete.
- 6. In the confirmation box, click **Delete** again. The contact is permanently removed from your personal contacts list.





## Make a Call

You can use the dial pad to make a call, either to a person in your Contacts list or by manually dialing a phone number.

#### To make a call:

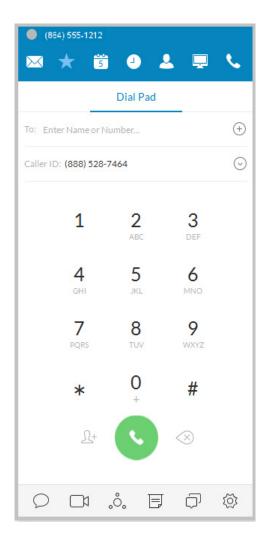
- 1. Click \(\mathbb{\ceil}\) at the top menu to bring up the Dial Pad.
  - In the To field, either click + to select a contact, or click the digits on the dial pad to manually dial a phone number.
  - In the Caller ID field  $\bigcirc$  click the caret to select the phone number you want displayed to the receiver of the call.
- 2. Select the number.
- 3. Click the green call button 🕟 to place the call.
- 4. When the call goes through, the caller's screen will change to Active Call, shown at right, and display either the called phone number or extension number if the call is to an internal number.

TIP: You can always make a call directly from your Contacts screen, too. Just click the name you want to call and your call will connect from the screen.

#### Caller ID

The Outbound Caller ID is set to your company name by default.

In some geographic areas, your ability to use your user name (first name, last name) for the outbound caller ID is enabled. This is not supported in the United States. To use this feature, users must contact RingCentral Support to enable. When enabled, the tick box appears in your software.





#### **HD Voice and Secure Call Indicators**

• HD Voice provides optimum call quality automatically between devices that support high definition.

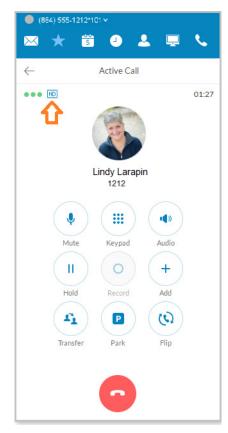
RingCentral employs the Opus codec, which provides greater voice clarity, especially in limited bandwidth and network environments.

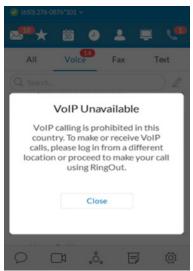
• Secure Voice  $\triangle$  calls are supported between devices capable of that feature.\*

\*Secure Voice can be obtained after contacting your account manager at RingCentral.

#### VoIP Unavailable

A warning shows when VoIP calling is unavailable.



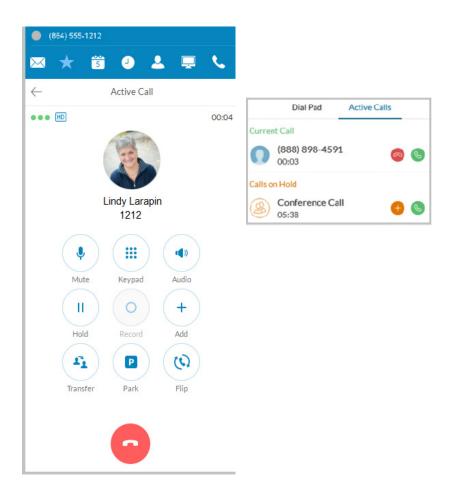




# Call Management

Call Management features display of a Current Call and a Call on Hold. From the screens, these quick actions available:

- Resume or answer a call
- Join a held call to a current call
- Add a call to a conference
- Transfer a call to another extension
- Record a call
- Mute a call
- Activate your speaker
- Place a call on hold
- Park a call in the cloud
- Flip a call to a forwarding number in your extension
- End a call





## Answer a Call

When a call comes in, your RingCentral Phone screen automatically changes to the Incoming Call screen so you know someone is calling you even when you don't have the sound turned up on your computer. The Incoming Call screen shows the phone number (or internal extension) of the person calling, as well as the name and photo of the person, when it's available. A user has the option of answering the call:

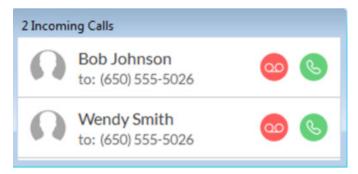
- Forwarding the call to another extension
- Replying with a text message
- Sending it directly to voicemail
- Ignoring the call
   If ignored, it is handled according to the call handling rules set up by
   the extension owner.

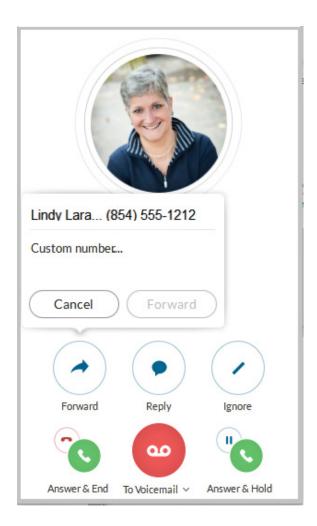
From here, you can decide how you want to answer the call.

### Pick up the call

From the Incoming Call screen, click to pick up the call. The volume on your computer is automatically switched on. If you like, you might want to have your headset handy so you can use it for the call. New Window for Each Incoming Call.

All incoming calls are presented in a separate window when they come in. This window appears when you have more than one incoming call.







## Respond with a Courtesy Message

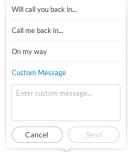
When you can't take the incoming call right away, you can provide a courtesy response. RingCentral Phone has automatic text-to-voice options. You can select a prepared message or type your own custom message, and RingCentral Phone will convert it to voice and relay the message to your caller.

## To respond with a prepared message

- 1. From the Incoming Call screen, click Reply.
- 2. A popup screen opens with three different messages, such as: Call me back in.
- 3. Click the message you want to use. If Call me back in, then enter a time limit.
- 4. Click Send. RingCentral Phone relays the message to your caller.

## To respond with a custom message

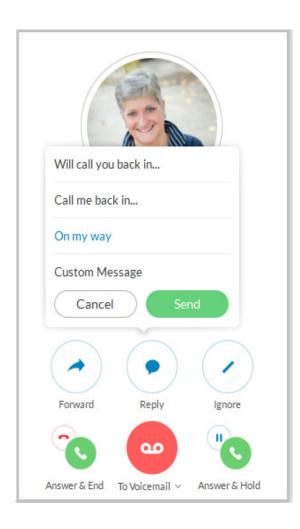
- 1. From the Incoming Call screen, click Reply.
- 2. Click Custom Message. A popup screen opens with message options.



- 3. Enter the response you want to send.
- 4. Click Send. RingCentral Phone relays the message to your caller.

## To respond to an urgent request

When an urgent request is received, and replied to with a custom message, the requester may press 5 on their phone and enter an "urgent" call back number that is instantly received.





#### Screen Voicemail

When you're not sure if you want to pick up the call, you can screen the call. RingCentral Phone allows you to send the caller to voicemail, but you can hear the message the caller is leaving you. At any time while the caller is leaving you the message, you can pick up the call, and talk to the person. Voicemail is automatically stopped and your call becomes live again.

#### Screen the call

- From the Incoming Call screen, click To Voicemail > Screen Voicemail.
- 2. You can hear the caller leaving you a message.
- 3. To answer the call in progress, click Pick Up.
- 4. To stop screening and let the call continue to voicemail, click Stop Listening.

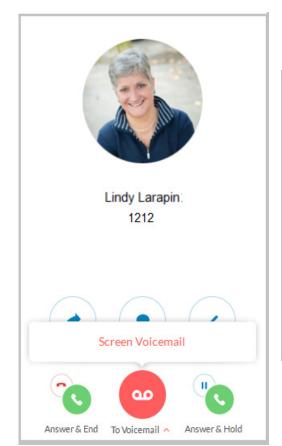
#### Send the Call to Voicemail

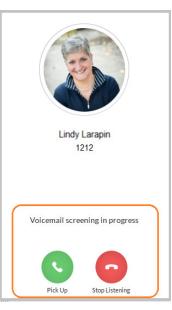
When you can't take a call right away, you can send it to voicemail so the caller can leave you a message. To do so, from the Incoming Call screen, click To Voicemail.

#### Forward the call

When a call comes in and you think someone else might want to take it, you can forward the call. Here's how:

- 1. From the Incoming Call screen, click **Forward**. A popup screen opens with phone number options.
- 2. To Call Forward
  - Click the phone number where you want the call forwarded. or
  - Click Custom and type the phone number you want.
- 3. Click Forward.
  - RingCentral Phone transfers the call to the new phone number.
- 4. Click **Ignore** to stop ringing on your app and allow call forwarding rules to take effect.



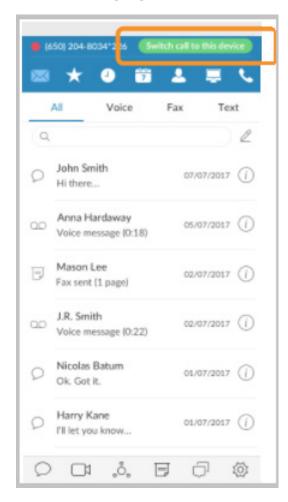


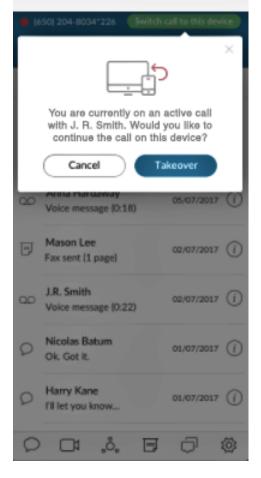


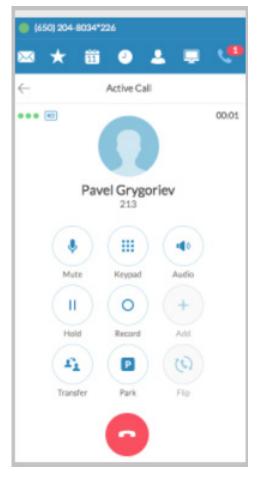
#### Call Switch

If you are finishing an urgent phone call taken on your RingCentral Phone, but you must go into a meeting, you can instantly switch the call from your desktop client to your mobile client and not miss a beat in the ongoing conversation. Any screen of an active RingCentral Phone prompts a 2-click process that enables instant call handover between endpoints. You do not have to wait for the incoming call on your receiving device to pick up. You can engage the receiving endpoint with

2 clicks while still on your call and immediately pick up the conversation. This minimizes interruptions to on-going calls and reduces time needed to switch and pick up a call on a receiving device.



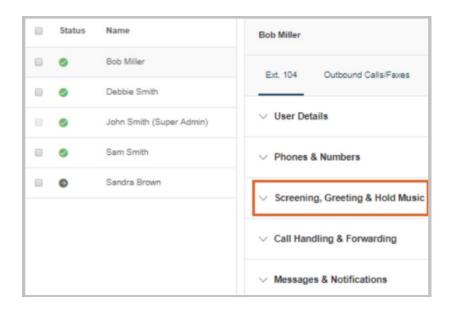


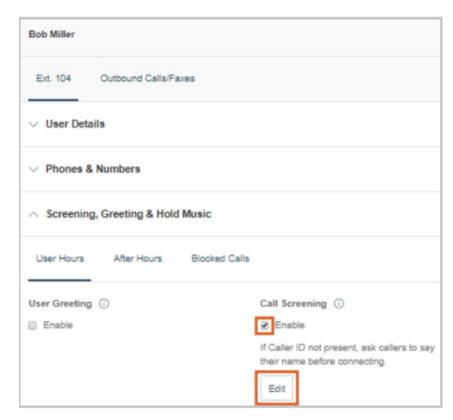




# **Call Screening**

When Call Screening is enabled, users answering a call are able to hear the caller's recorded name an use the IVR prompt to answer the call.







# **Switchboard Support**

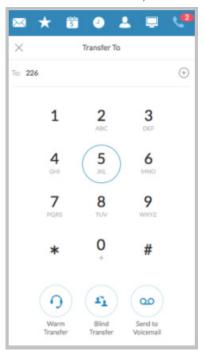
Provides live answer capability to inbound calls. (Additional call information is exposed when in use.)

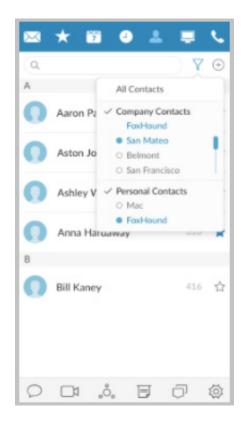
• After live answer to call, attendant can see all destination into which the

- customer is calling and can quickly find the correct person.
- A recent call list contains the top 10 recent numbers used for transfer.
- Search and filter options that allow the user to view contacts from different sites or filter the full list of sites and access contacts at a lower level in the hierarchy.
- The use of this feature depends on multilocation availability for a specific account.
- Filtering available by searching through particular Sites.







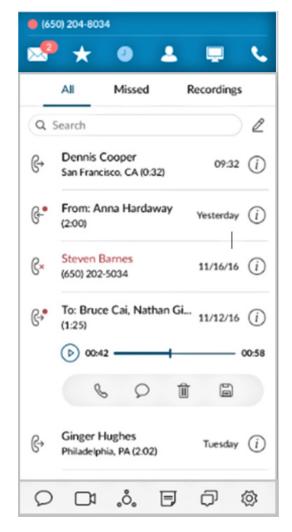


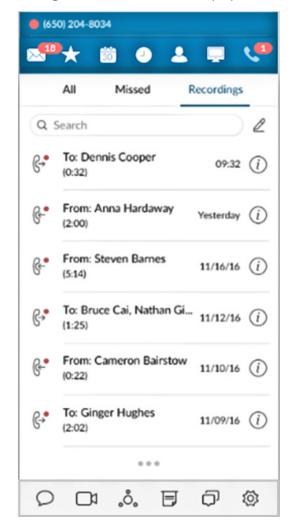


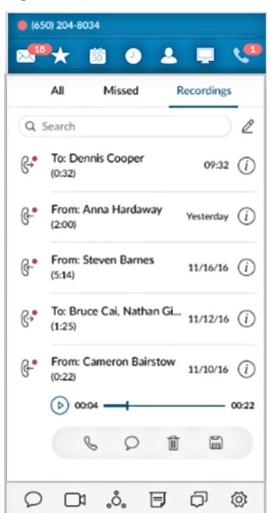


# **Call Recordings**

Call recordings can now be accessed from your RingCentral Phone call log. The small red dot indicates calls that have been recorded. The tiny arrows indicate whether the call is inbound or outbound. Selecting Recordings shows which calls can be played or deleted (images 2 and 3).









# View or Listen to a Message

The Messages screen lists all of your messages in one place so you can prioritize the ones you want to open first. You can see your voicemail, fax, and text messages on this screen. Your messages are automatically synced from your online account and mobile app, so this message list is always current.

By default, you're shown all messages, but you can click on any tab at the top of the screen to narrow your view to only one type of message. The red numbers next to the tabs tell you how many new messages you have.



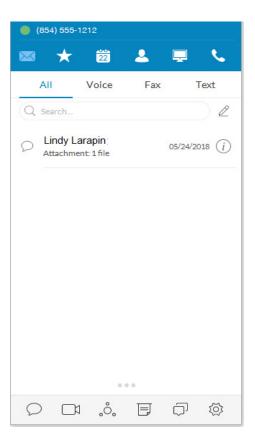
## To View Your Messages

At the top of the screen, click . The Messages screen opens. All of your messages are listed on the screen.

## Voicemail-to-Text Transcription

When enabled, your voicemail messages will be converted to text and displayed. Office Ultimate customers can also enable Voicemail from the Messages and Notifications settings.

Voicemail Preview is limited to the first 60 seconds of the message; short messages of less than 5-6 seconds will not be converted. Accuracy is not 100% and is influenced by the speaker's accent and connection factors.



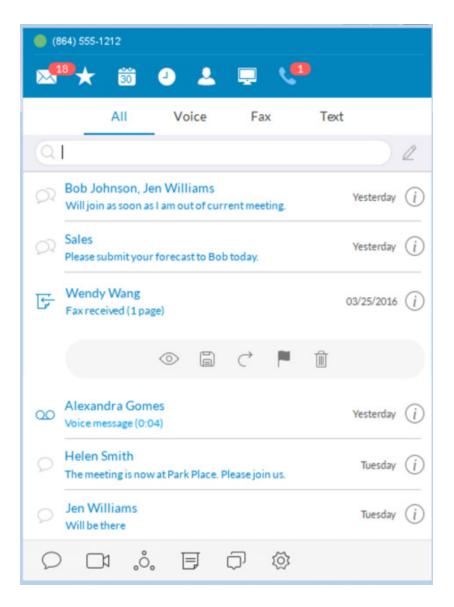


## To Listen to a Voicemail Message

Voicemail messages are shown with this icon: OO. Click the message you want to hear. Then click on the audio bar to start the message.

When you've finished listening to the message, you can:

Click	To do this
E	Call the person back.
Q	Text the person a message.
	Delete the message. It is permanently removed from your account.
	Save the files to the cloud.
P	Flag a message you've already heard.
$\oslash$	Block this number from your account so you no longer receive calls.
(i)	Add this person to your contact list.



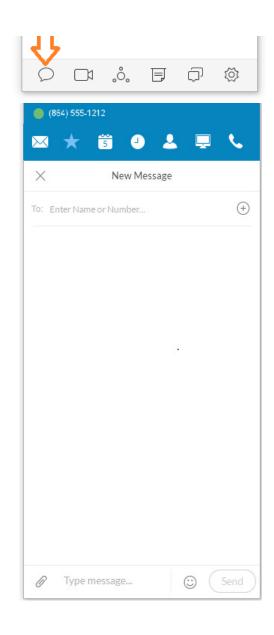


# Send or Receive a Text Message

RingCentral Phone lets you send a text message to anyone you want, even if the person isn't in your company network, so you can communicate easily with clients, friends, and family. You can send a text to one person at a time, multiple people listed together, or an existing group (of people) already set up in your Contacts list. When you're texting multiple people or a group from your company directory, you can see the entire conversation thread from everyone participating in the thread.

To send and receive a text message:

- At the bottom left of the screen, click . The New Message screen opens.
- 2. In the **To** field, either click to search for contacts, or type the phone numbers you want.
- 3. Select the Caller ID.
- 4. In the **Type message** field, enter your message.
- 5. Click **Send**. Your message is sent.
  - Keep the screen open and you'll see any responding text messages. You can send another text and keep the conversation going for as long as you want.
  - If you miss a responding text, the Message screen will keep count of unread texts and save them there so you can read them at your convenience.



## International SMS

Enables customers to send/receive international SMS from non-international numbers. SMS messaging functions both inside and outside the company. For US and Canada only. Contact your account representative for availability.

Your rate information is shown in the Admin Portal under **Billing** > **International Calling**.

An admin can view the usage from **Billing** > **Service Plan** > **Usage Info**.

You cannot enable or disable the International SMS-only feature.

- Business SMS and International calling must both be enabled.
- If you disable international calling, international SMS is also disabled.



# Hold an Audio Conference Call

You can hold an audio conference call at any time directly from RingCentral Phone.
Conference calls can be held immediately, with no need to schedule one ahead of time. Every RingCentral user is assigned a unique conference line so you can have a conference call whenever you need one without worrying about network congestion.

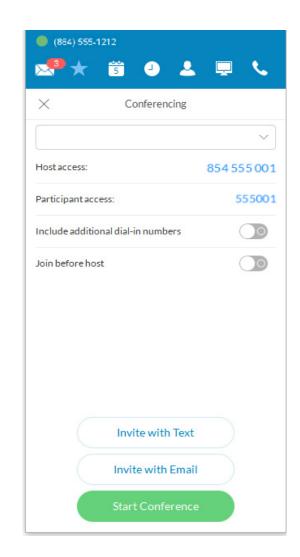
Conference calls are a great way to get multiple people on the same call so you can discuss a topic. This is an audio-only connection. If you want to have a video meeting, use RingCentral Online Meetings instead.

Your Host Access number is the phone number you dial to start the conference call. The Participant Access number is the phone number your guests will dial to join your conference call.

The host of a multi-way conference call can disconnect any party in the call.

## **Premium Conference Numbers**

If an international dial-in number for RingCentral audio conferencing does not offer toll-free access, you can purchase a toll-free or international number for a conference bridge. This is enabled through RingCentral Self-Service or by submitting a ticket.



#### To Hold an Audio Conference Call

- 1. At the bottom of the screen, click oo. The **Conferencing** screen opens, listing your Host Access and Participant Access numbers.
- 2. If you have international participants, turn on Include additional dial-in numbers. This option lets you include local numbers in other countries so your participants won't be charged international fees. Once you turn on this option, you can select the countries you would like to include in the invitation.
- 3. Decide if you want to invite people by text message or by email. Then click either Invite with Text or Invite with Email. The screen will switch to the email form or a text message.
- 4. In the **To** field, find the contacts you want, or type their phone numbers. Notice that an invitation message, complete with dial-in numbers, is automatically created for you. You can tack on a personal message if you like.
- 5. Click **Send**, and your invitations are sent to your participants.
- 6. Now, click Join as Host to start the conference call. The Active Call screen opens so you can manage your conference call as needed. The Mute, Record, and Add+ (persons) options are especially useful during a call.
- When you're finished with your conference call, click End Call to stop the conference call for everyone and hang u



# Launch an Online Meeting

You can hold an online video meeting at any time using RingCentral Online Meetings and start it directly from RingCentral Phone. Online Meetings can be held immediately, with no need to schedule one ahead of time, unless you want to. Every RingCentral user is assigned a unique RingCentral Online Meetings ID and password, so you can hold as many online meetings as you want.

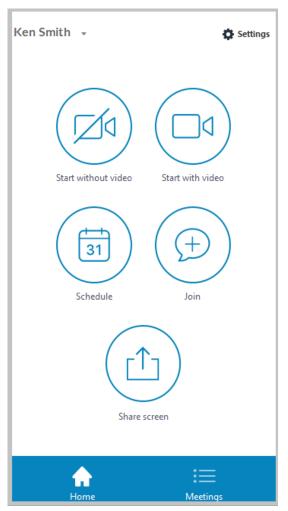
Online meetings are a great way to reach multiple remote people to discuss a topic as if you're all in the same room. You have access to video views from web cameras so you can see people face-to-face, and screen shares, so you can easily share presentations or other documents on your computer with everyone in the online meeting.

To join or schedule RingCentral Online Meetings:

- 1. At the bottom of the screen, click RingCentral Meetings opens in a separate window on your computer.
- 2. Click Join a Meeting if you have been invited to a meeting, or click Sign In if you want to set up an online meeting.
- 3. On the Sign In screen, select your country and enter your credentials.
- 4. Click Schedule Meeting if you want to set up an online meeting.
- 5. Or click Join a meeting if you're connecting to a meeting set up by someone else.

For more information on how to use all the RingCentral Meetings features to make your online meeting more productive, see the RingCentral Meetings User Guide.







## Send or Receive a Fax

You can send and receive online faxes directly in RingCentral Phone so you'll never have to walk to your separate fax machine again. Your phone number is also your fax number, so you only have to remember one number. You can fax to one or more people at the same time.

#### Send a fax:

- 1. At the bottom of the screen, click 🕝 . The Send Fax screen opens.
- 2. In the To field, either click to search all the contacts you want to fax, or type all the fax numbers.
- 3. To add the contact to the fax **To**: field,
  - Click the contact's caller ID or phone number. The contact is automatically added.
  - Begin entering the contact's name in the **To:** field. When it matches a contact in the list, you can click the name that appears.
- 4. Decide if you want to include a cover page. The default is Blank. Click the blue caret > next to Blank to see your cover page options.
- 5. Or click the blue plus icon , then scroll to the bottom to see instructions on how to create your own custom cover page and add it to the list.
- 6. Click ✓ at the top right of the screen to save your selection.
- 7. Back on the **Send Fax** screen, in the **Note** field, add a comment or message, if you want.
- 8. Attach any files you want to send. Click 1 to browse and upload your attachment. Or drag-n-drop files from your desktop onto the dotted field (up to 20 MB).

- 9. You can also click to scan and attach a document from the scanner you have selected in **Settings > Messaging** so long as the scanner is installed, powered on, and connected to your computer.\*
- 10. Click **Send now** to send your fax now, or click **Send later** and set the date and time when the fax will be sent.

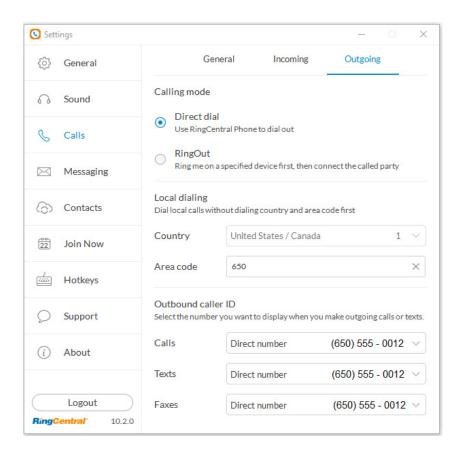
ASCII and non-ASCII characters are supported.



#### Set Caller ID for Faxes

Set the Caller ID for faxes by using these steps:

- 1. Click the **Settings** icon .
- 2. Click Outgoing.
- 3. In Fax **Direct number**, enter the phone number.





## View Your Call Activity Records

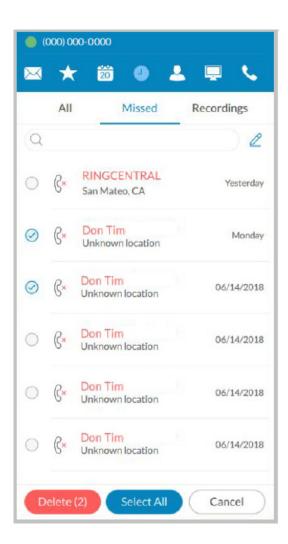
You can easily review your call activity directly from RingCentral Phone. All call transactions (outgoing and incoming/missed) calls to your phone number are listed so you can check them when you want.

To view your call activity records:

- 1. At the top of the screen, click . The call log screen opens, showing all of your incoming and outgoing calls.
- 2. Here's how you can read the log:
  - Means a missed call
  - Heans an outgoing call you made
  - Means the call is selected for deletion.

#### Did you know?

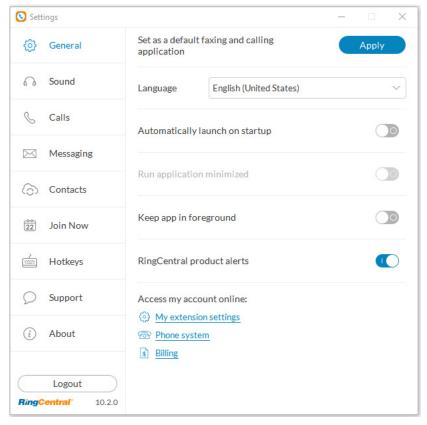
Double-click on any call listed in the log to call the person again. Or click (i) to see more options, such as adding the person to your Contacts list.





# Personalize RingCentral Phone

RingCentral Phone is ready to use as soon as you install it on your computer and log in. But it's nice to personalize the app.



Settings screens are from the Windows app; Mac screens are similar.

Note: RingCentral Phone follows the user's device language when available. Users can set their language of choice in the Language dropdown menu on the **Settings > General** page.

Here's how you can personalize RingCentral Phone.

1. At the bottom of most app screens, click . The **Settings** screen opens in a separate window.

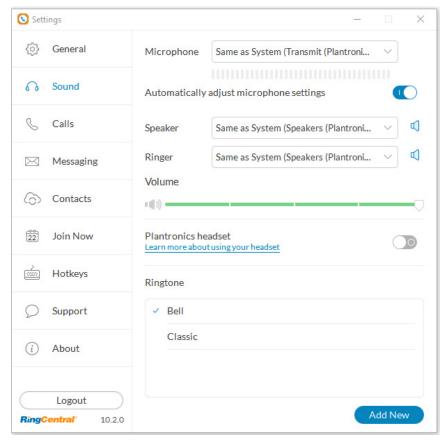
Click	To do this
General	Set as a default faxing and calling application. Clicking the Apply button changes the status to "Currently set as default faxing and calling application" Return to previous setting by:
	Automatically launch this application on startup: ON or OFF
	Run application minimized: ON or OFF.
	Keep application in foreground: ON or OFF. Set this switch to ON to keep the application running on top of all other applications.
	RingCentral product alerts: Informs customers of new features and service offerings.
	Access my account online: Clicking My Extension Settings opens your RingCentral application where you may review your or change your settings. Clicking Phone System opens your RingCentral application where you may review or change your phone settings. Clicking Billing opens your RingCentral application where you may review your service plan and international call settings. Note: Phone System and Billing are accessible only to Administrators.

2. In the left menu, select your preference for any of the following:



#### Sound Menu

Use the **Sound** menu to manage your Microphone, Speaker, and Ringer style and volume. If installed, the Plantronics Headset can be switched **ON** or **OFF** from the Sound menu.

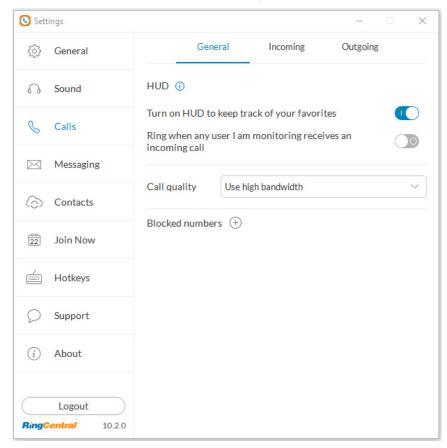


Click	To do this	
Sound	Microphone Use the Sound menu to manage your microphone type and level.	
	Automatically adjust microphone settings. Switch this OFF to manually adjust your microphone.	
	Speaker Use the drop-down to select Speakers/Headphones. If the Plantronics Headset is installed in your system, you can select it here.	
	Ringer Users who prefer the desktop application not to ring during an incoming call can turn off the ringer. This can be configured on the RingCentral Phone App at Settings > Audio > Ringer.	
	<b>Volume</b> Set your speaker or handset volume with the slide bar.	
	Plantronics Headset Switch the Plantronics Headset ON or OFF from the Sound menu. (Headset must be installed.)	
	Ringtone Choose a ringtone you prefer. Click to hear the sound or click Add New to upload a custom ringtone.	



#### Calls Menu - General

The Calls menu allows quick access to many RingCentral Phone settings. See the General menu for HUD, Call Quality, and Blocked numbers.

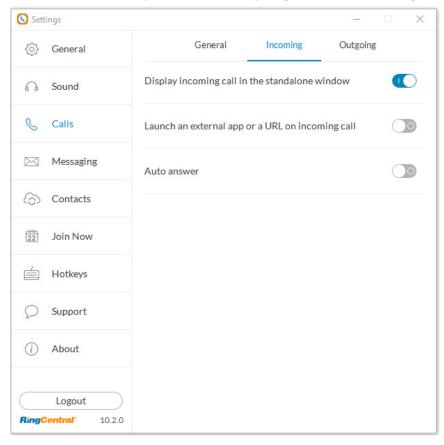


Click	To do this
Calls Menu General	HUD Monitor your contacts, view presence status, and call or text them. Ring when and user I am monitoring receives an incoming call.
	Call Quality Use high bandwidth whenever possible.
	Blocked Numbers Click the + sign to open a field into which you can list phone numbers that you want to block from reaching your extensions.



#### Calls Menu - Incoming

The Calls menu allows quick access to many RingCentral Phone settings.



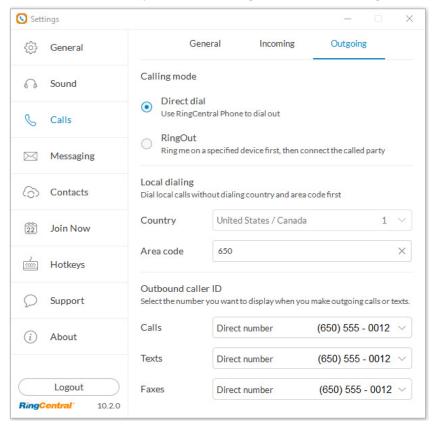
Mac users can choose to automatically pause iTunes when a call comes in.

Click	To do this	
Calls Menu Incoming	Display incoming call in the standalone window.	
	Launch an external application or URL on incoming call.	
	Auto answer Switch ON to select the number of seconds to wait before an incoming call forwards to voicemail or another extension. This can range from 5 to 30 seconds.	



### Calls Menu - Outgoing

The Calls menu allows quick access to RingCentral Phone settings.



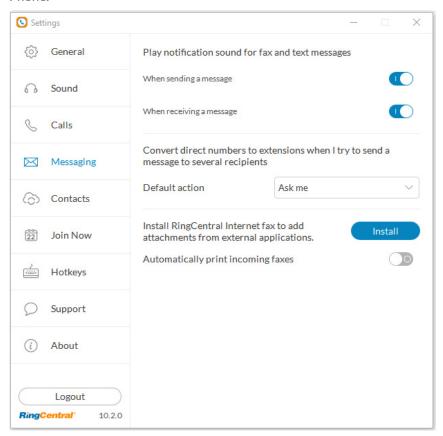
Click	To do this	
Calls Menu- Outgoing	Calling mode / Direct Dial Direct Dial is visible only when a digital line is assigned to the computer where the desktop app is installed.	

Click	To do this	
	Calling mode /RingOut Ring me on a specific device first, then connect the call. Prompt me to dial 1 before connecting the call. Switch OFF for the call come directly to your extension without delay.	
	Default number This is a direct or company number to be displayed on profile screen and application status bar. The default number does not affect the displayed number of a person to whom the user is calling. You select this default number is selected in the user profile.	
	Local Dialing Dial local calls without dialing the country and area code first. Select your Country or Area code from the given menus.	
	Outbound caller ID Select the number you want to display when you make outgoing calls or texts.	
	Calls From the drop-down menu, select a number from which your calls will originate. All numbers on the Service Web are available.	
	Texts From the drop-down menu, select a number from which your texts will originate.	
	Call Quality Use High bandwidth whenever possible.	



### Messaging Menu

Use the Messaging menu to manage incoming calls to the RingCentral Phone.

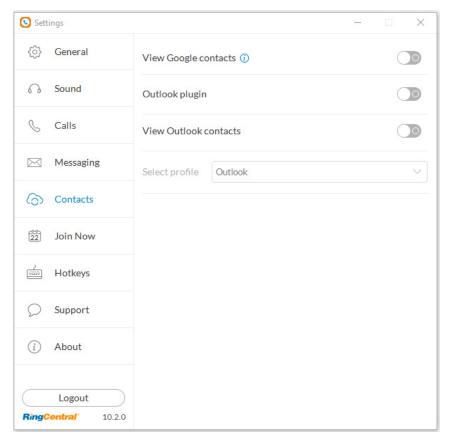


Click	To do this	
Messaging	Play notification sound for fax and text messages	
	Convert direct numbers to extensions when I try to send a message to several recipients  Extensions are sometimes easier to recognize between colleagues. Decide when you'd like to do a conversion like this. Default action: Ask me; or Do not convert; or Convert.	
	Install RingCentral Internet fax to add attachments from external applications Installs RingCentral Internet fax driver to a printer. When you send a document to this printer, it is added to the fax as an attachment.	
	When <b>Automatically print incoming faxes</b> is ON. a list of printers will appear for selection (Windows only). The default setting is OFF	



### Contacts Menu - Integrate with Microsoft Outlook

RingCentral Phone seamlessly integrates with Microsoft Outlook so you can conveniently call, fax, or text all of your contacts while you're in Outlook. Available for Microsoft Windows users only.

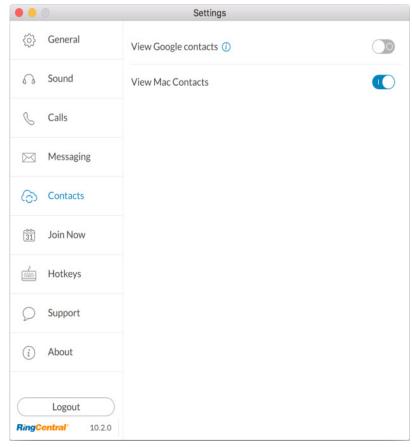


Click	To do this	
Contacts	View Google Contacts Enable to view Google contacts	
	Outlook plugin Enable to download Outlook plugin.	
	View Outlook contacts Enable to select from Outlook folders.	
	Select profile Select from available profiles.	



### Contacts Menu - Integrate with Mac Address Book

RingCentral Phone seamlessly integrates with Mac Address Book so you can conveniently call, fax, or text all of your contacts while you're in your Mac Address Book. *Available for Mac users only*.

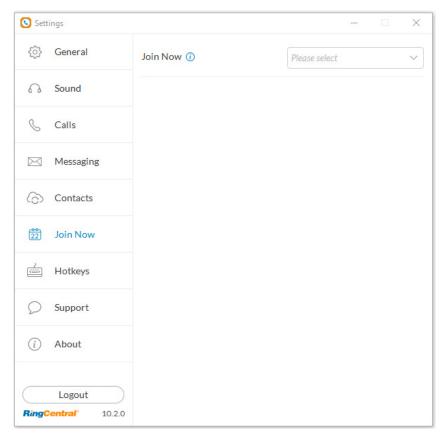


Click	To do this
Contacts	To set up your Mac Address Book to sync with Ring- Central Phone:
	<ol> <li>At the bottom of the app screen, click the Settings icon. The Settings screen opens in a separate window.</li> <li>From the left menu, click Contacts.</li> <li>Set the View Contacts from "Contacts" option to ON.</li> </ol>
	If this is your first time syncing you Mac Address Book with RingCentral Phone, you will be asked to allow RingCentral Phone to access your Mac Address book.

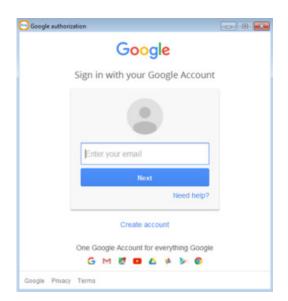


#### Join Now

Join Now integrates with Google, Outlook (Win), and iCal (Mac) calendars, so you can identify and join meetings and conferences, and make calls from calendar events.



Click	To do this
Join Now	<ul> <li>Identify meetings and conferences, and make calls from calendar events.</li> <li>Connect to Google Calendar or Outlook.</li> <li>Configure calendar source and notifications.</li> </ul>

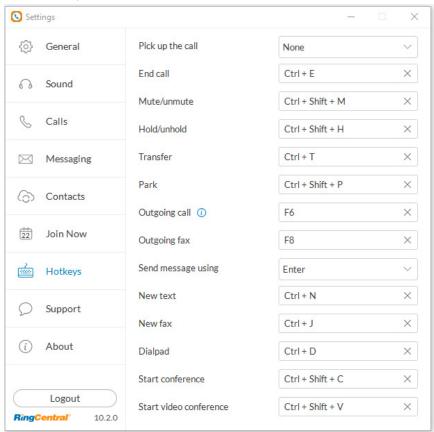






### **Hotkeys for Microsoft Windows**

These hotkeys are available for Microsoft Windows users.



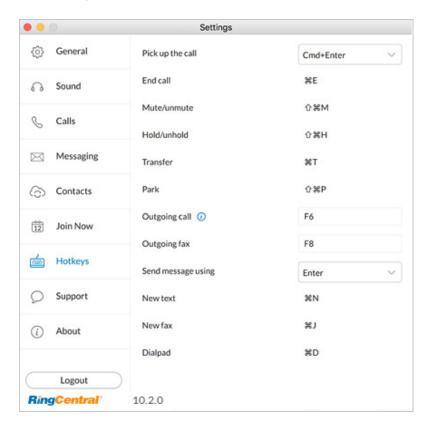
Click	To do thi	s
Hotkeys for Windows	<ul> <li>Hotkeys*</li> <li>Mute/unmute</li> <li>Hold/unhold</li> <li>End call</li> <li>Pick up the call</li> <li>Sending new text</li> <li>Sending new fax</li> </ul>	Shift + Ctrl +M Shift + Ctrl + H Ctrl + E None; Ctrl + Enter; Enter Ctrl + N Ctrl + J
	Advanced Hotkeys*  Outgoing call Outgoing fax Send text message using Enter Park Transfer Dialpad	F6 F8 Ctrl + Enter Shift + Ctrl +P Ctrl +T Ctrl +D
	Access my account online  Extension settings  Phone system  Billing (requires login to your online account)	

\*Hotkeys on your RingCentral Phone will work if the app is minimized, but the app must be active for them to function. This allows you to perform specific actions with just a touch of a key on your Windows PC. You can set hotkeys to pick up a call or to send a text message.



#### Hotkeys for Mac

These hotkeys are available for Mac users.

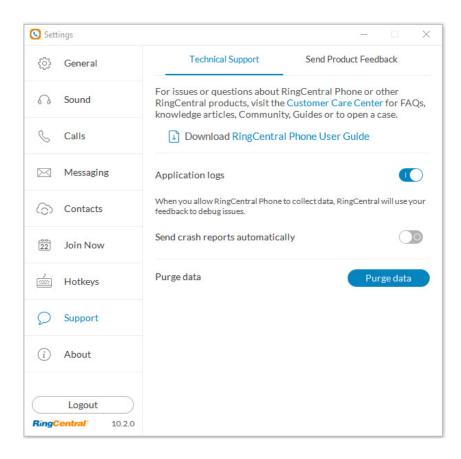


Click		To do this
Hotkeys for Mac	Hotkeys*  Pick up the call  End call  Mute/unmute  Hold/unhold  Transfer  Park	None; Cmd + Enter; Enter Cmd + E Shift + Cmd + M Shift + Cmd + H Cmd + T Shift + Cmd + P
	<ul> <li>Advanced Hotkeys*</li> <li>Outgoing call</li> <li>Outgoing fax</li> <li>Send message using</li> <li>New text message</li> <li>New fax</li> <li>Dialpad</li> </ul>	F6 F8 Enter; Cmd + Enter Cmd + N Cmd +J Ctrl +D
	Access my account online  Extension settings  Phone system  Billing (requires login	to your online account)



# **Technical Support**

For issues or questions about RingCentral Phone or other RingCentral products, visit the Customer Care Center for FAQs, knowledge articles, Community, Guides or to open a case.

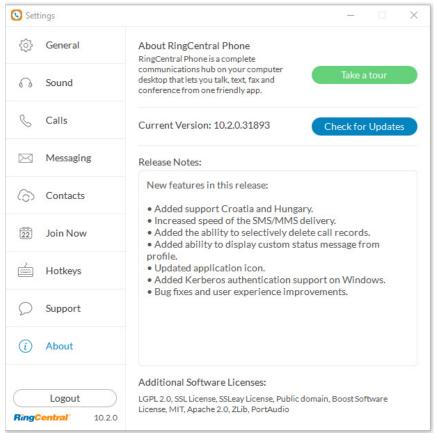




#### **About**

RingCentral Phone is a complete communications hub on your computer desktop that lets you talk, text, fax, and conference from one friendly app.

The message below your **About** screen appears when you click **Check for Updates** if your installed version of RingCentral Phone is up-to-date.



Click	To do this
About	About RingCentral Phone RingCentral Phone is a complete communications hub that lets you talk, text, fax and conference from one convenient app on your computer desktop.
	Take a tour Learn about the latest features in the easy-to-use, friendly desktop application.
	Check for Updates The current version of the RingCentral Phone app installed on your computer system is shown here.  Click Check for Updates to determine if you have the latest version installed.  Use this button to download updates to your desktop application.
	Release Notes Lists the new features in this release.



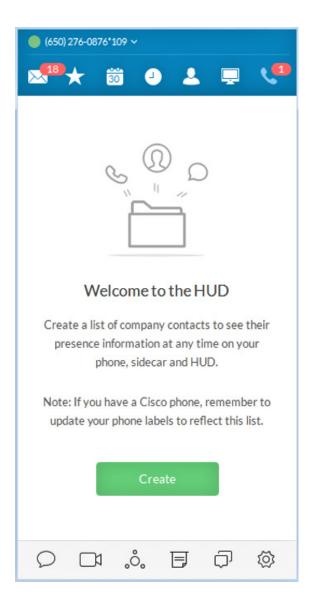
## Head Up Display

**Head Up Display (HUD)** is a call management feature that allows you to monitor and interact with up to 100 user extensions that you can add to a HUD list, which is displayed alphabetically.

With HUD you can view the presence status of each extension on the list in real time. You can also transfer active calls to any extension in your system, and add users to active calls. If you have permission, you can pick up incoming calls on behalf of other extensions.

To enable HUD, follow these steps:

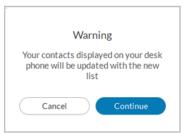
- 1. Click the HUD icon at the top of most app pages.
- Welcome to the HUD will appear if you have not set up your Presence appearance in your online account; otherwise your HUD list will sync automatically to the extensions in your Presence appearance.





#### To add extensions to the HUD, follow these steps:

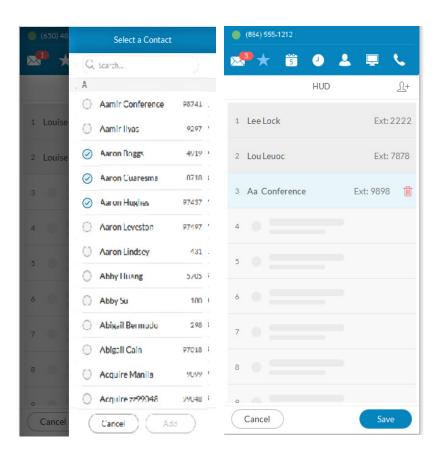
- 1. Click the green Create button (previous page). The Select a Contact screen opens.
- 2. On the Select a Contact screen, place a check mark next to users you want to add to your HUD list, and click Add.
- 3. Click Save. You may see the warning message below. The warning alerts you that you will also change the settings in your online account for Presence appearance if you continue.



- 4. If you click Continue, your HUD list will appear as shown on the screen at right.
- 5. Click Save

Note: If the Presence Appearance is defined in the user's Office account, the HUD list will be set up automatically and synchronized to the user's Contacts list (User > Phones & Numbers > Presence > Appearance).

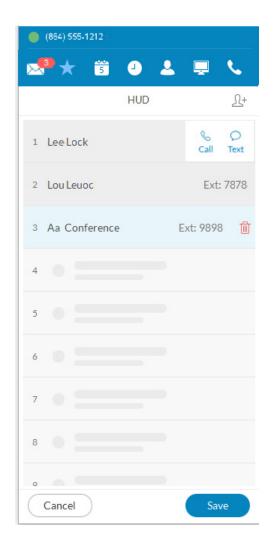
Click the Edit icon  $\mathcal{Q}$ ; then the Add icon  $\mathfrak{L}$ + on the HUD list to add more contacts.





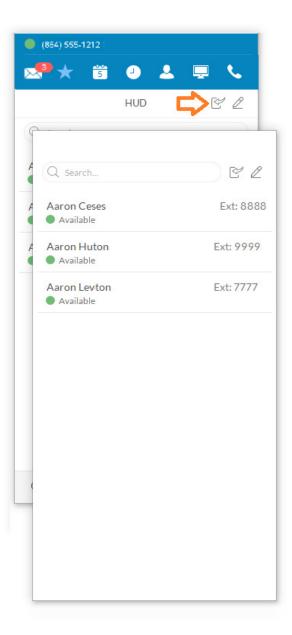
There are many ways you can manage calls with HUD:

1. On the new HUD list, mouse over a name to place a call or send a text message to the extension. Example: Lee Lock, Ext: 2222.





2. Click the **Undock** icon to see the complete HUD list in a separate screen for easy call handling. The HUD list can contain up to 100 extensions.



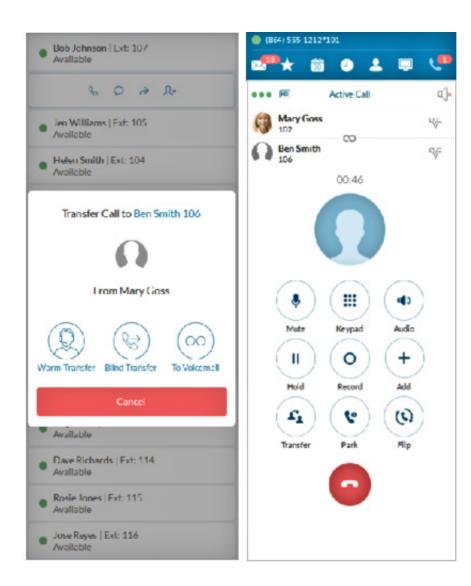


3. During an active call, mouse over the extension (Ben Smith, Ext: 106) to see additional options you can perform with HUD. These are Call, Text, Transfer, and Conference.



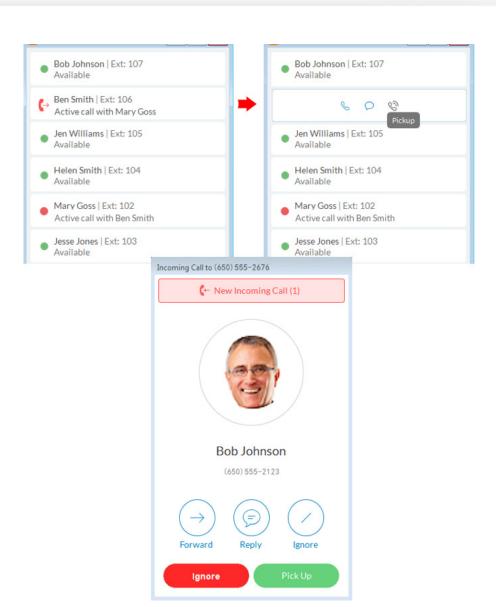
**HUD** options

- 4. You can transfer → your active call to another extension by Warm Transfer, Blind Transfer, or To Voicemail.
- 5. With HUD you can also instantly add 1+ (conference in) users to your active calls; for example, adding Mary Goss to your current call with Ben Smith.





- 6. To pick up an incoming call to an extension you have permission to monitor (example Ben Smith, Ext: 106), mouse over the extension to reveal the Pickup option. Click the **Pickup** icon to handle the call.
- 7. On the pop-up that follows, the person monitoring an extension can Forward the call; Reply to the call with text; Ignore the call; or Pickup the call and answer it on behalf of the extension owner.
  Ignoring the call will cause it to be handled by the call forwarding rules set up by the extension owner, such as going to voicemail, being forwarded to another phone, or forwarded to a colleague.





### **HUD Call Monitoring**

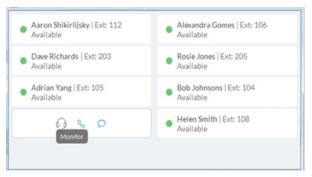
Incoming calls to an extension within the HUD list can be monitored if the extension owner has granted permission to the person who wishes to monitor that extension.

For example, when an agent is on a call, a supervisor in the same monitoring group can mouse over the extension to start monitoring the call.

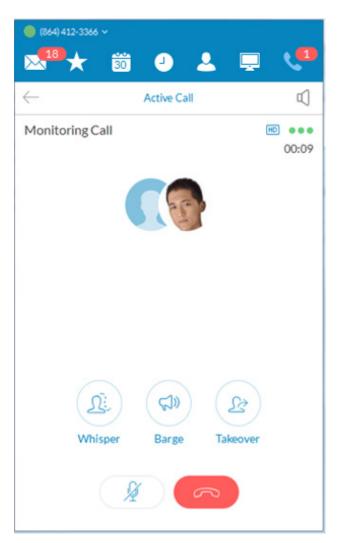
The supervisor can listen in and Whisper only to the agent; Barge in and be heard by both Agent and caller, or Takeover the call.



Agent Charlie Lee takes a call from a client.



Charlie's supervisor mouses over Charlie's extension and clicks **Monitor** to listen in.



Charlie's supervisor has the option to Whisper to Charlie, Barge in, or Takeover the call.



## Active Call Layout

This screen for conference calls provides:

- Improved layout for all local calls in conference
- An updated design that displays all parties in conference
- Improved user interface and structure



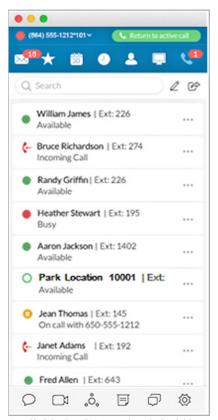


#### Park Locations at HUD

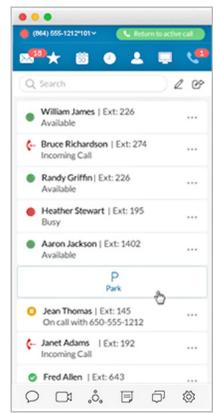
Park Locations is a feature on the Desktop App HUD that allows you to park a call privately that can only be answered by users within the group. This provides increased security as only selected employees can pick up the parked call.

Users within the designated group can pick up a parked call anywhere within RingCentral Phone, even when away from their desk.

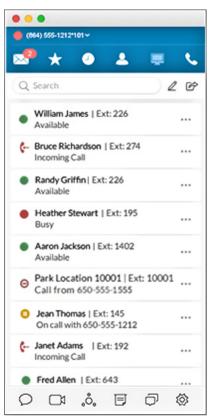
During an active call, click the **Park Location** group on the HUD; then mouse over the location to **Park** the active call. Answer parked calls by mousing over the **Park Location** extension and clicking **Pickup**.



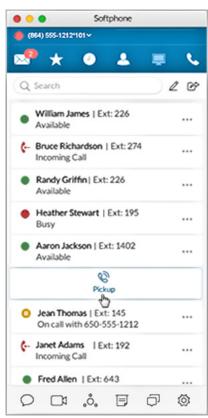
Available **Park Location** is boldface.



Mouse over **Park Location** and click it.



Call from 650-555-1555 is parked.



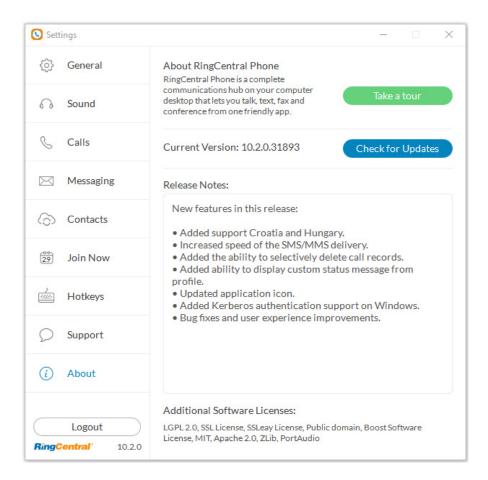
Mouse over parked call and click **Pickup**.



## **Check for Updates**

Click the View Settings icon . Click in near the bottom left of the Settings screen.

Next to Current Version: Click Check for Updates to determine whether you have the latest version of the RingCentral Phone application installed.



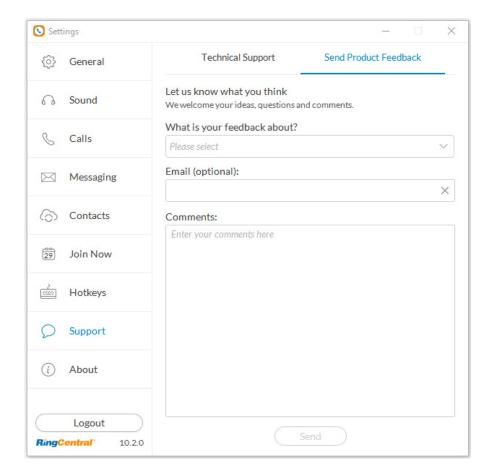


#### Give Us Feedback

We love hearing from you! Your comments help us improve RingCentral Phone, so don't be shy about telling us what's on your mind. We want to hear the good and the bad.

Here's how you can get in touch with us:

- 1. At the bottom of the screen, click . The **Settings** screen opens in a separate window.
- 2. From the left menu, click **Support > Send Product Feedback**.
- 3. In the What is your feedback about field, select the topic of your correspondence.
- 4. In the **Email** field, type your email address if you'd like us to respond to you.
- 5. In the **Comments** field, type your feedback. Go all out. Let us know what's on your mind. We are happy to hear whatever you have to say.
- 6. When you're done having your say, click **Send**.
  - Your feedback is sent around to the teams at RingCentral. While you might not get a response right away, rest assured that we hear you. We review every bit of feedback that comes our way. If you included your email address, we might contact you for more details.
- 7. Please send feedback as often as you like!



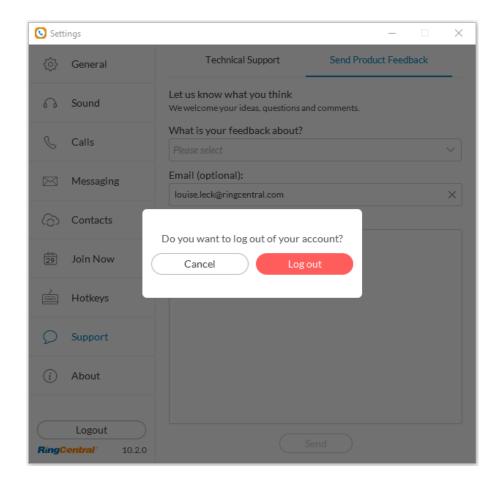


## Log Out of RingCentral Phone

When you're done with work for the day, you can log out of RingCentral Phone. Here's how:

- 1. At the top of the screen, click . The Settings screen opens in a separate window.
- 2. From the left menu, click Log out.
- 3. A confirmation message displays. Click Log out again.

You've now successfully logged out and closed your RingCentral Phone working session. See you tomorrow!



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