RingCentral RingEX™

Admin Guide

V23.1

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Overview

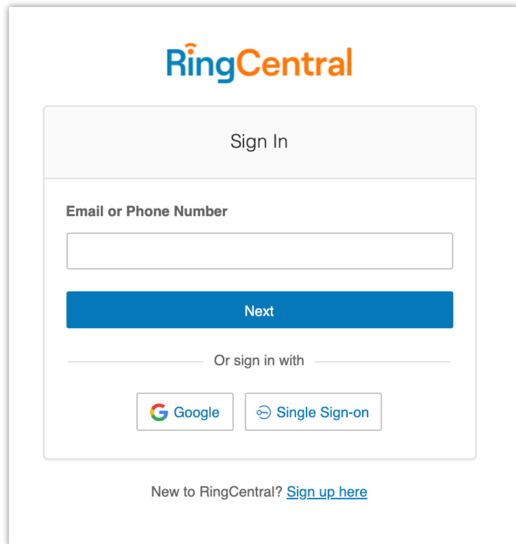
Introduction

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**.



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.

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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.

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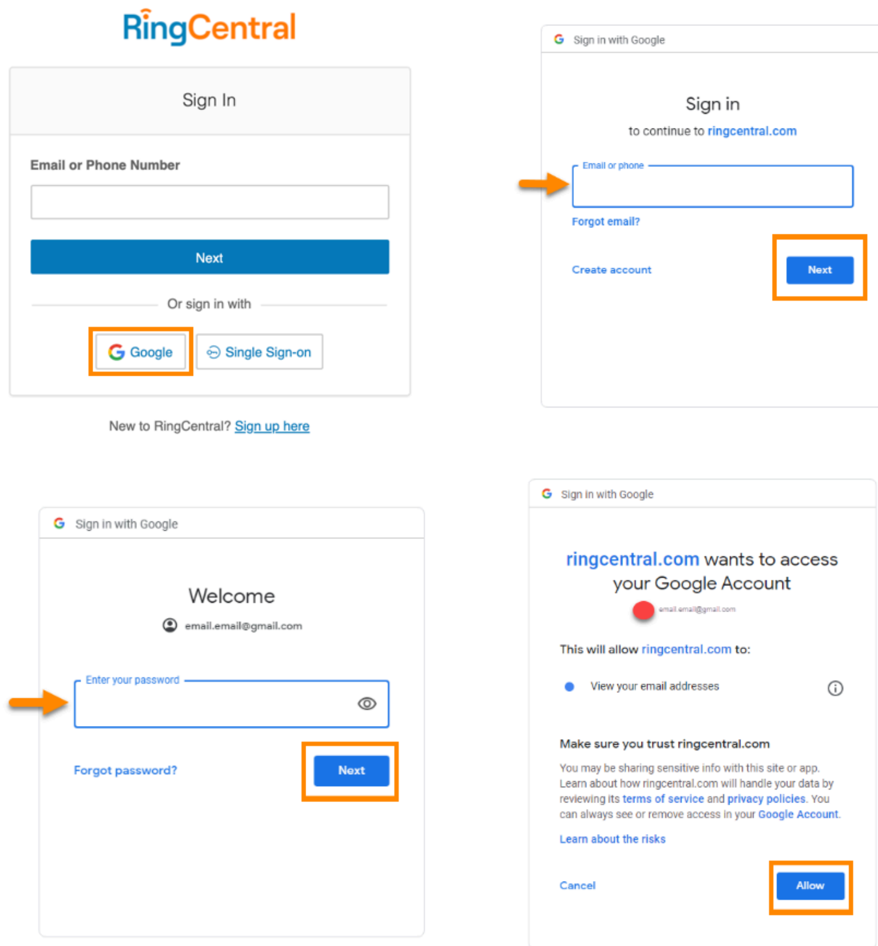

Single sign-on

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**.

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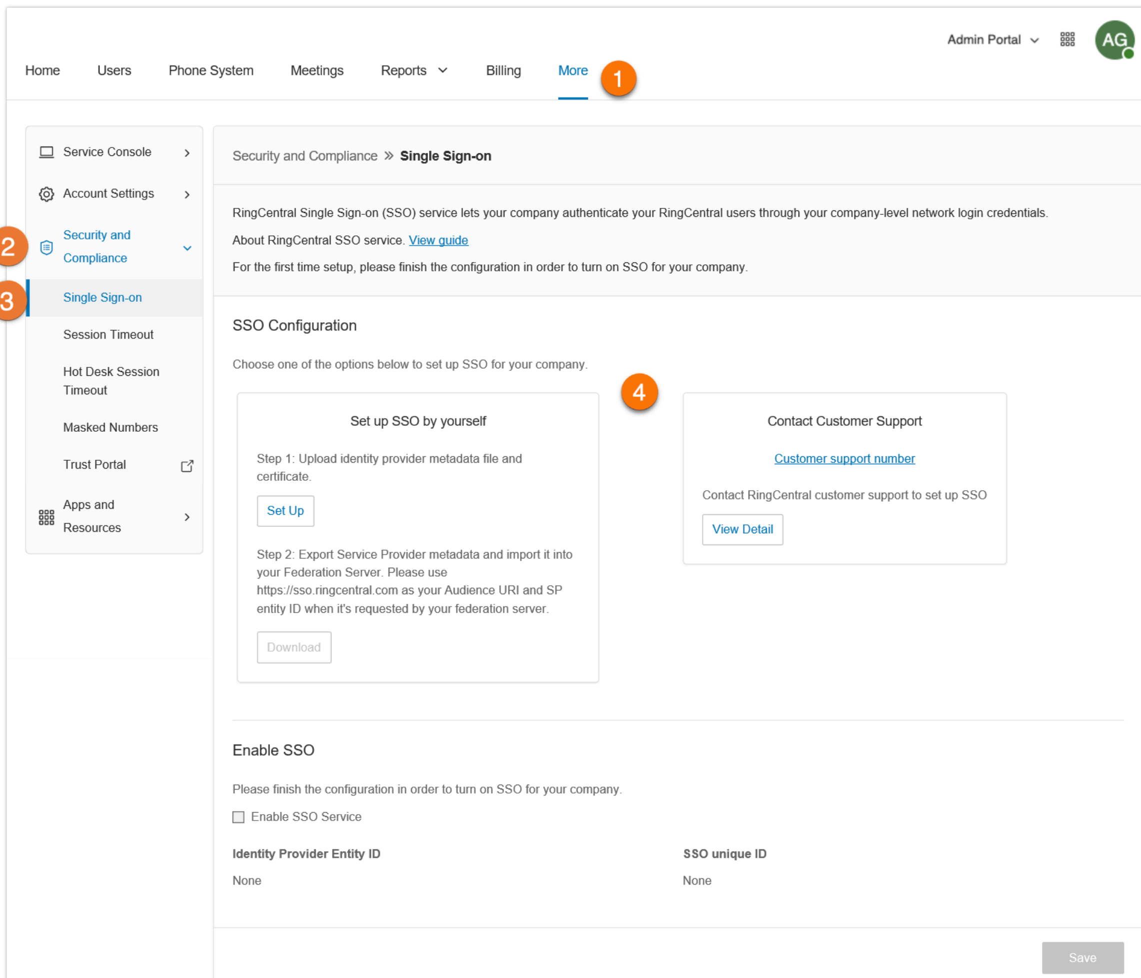
2. On the left-hand side, click **Security and Compliance**.
3. Click **Single Sign-on**.
4. Choose an option to set up SSO:
    a. **Set up SSO by yourself:** Use the self-service UI to configure the Service Provider (SP) settings. Perform the steps in Set up Single Sign-On by Yourself.
    b. **Contact 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.

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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*.

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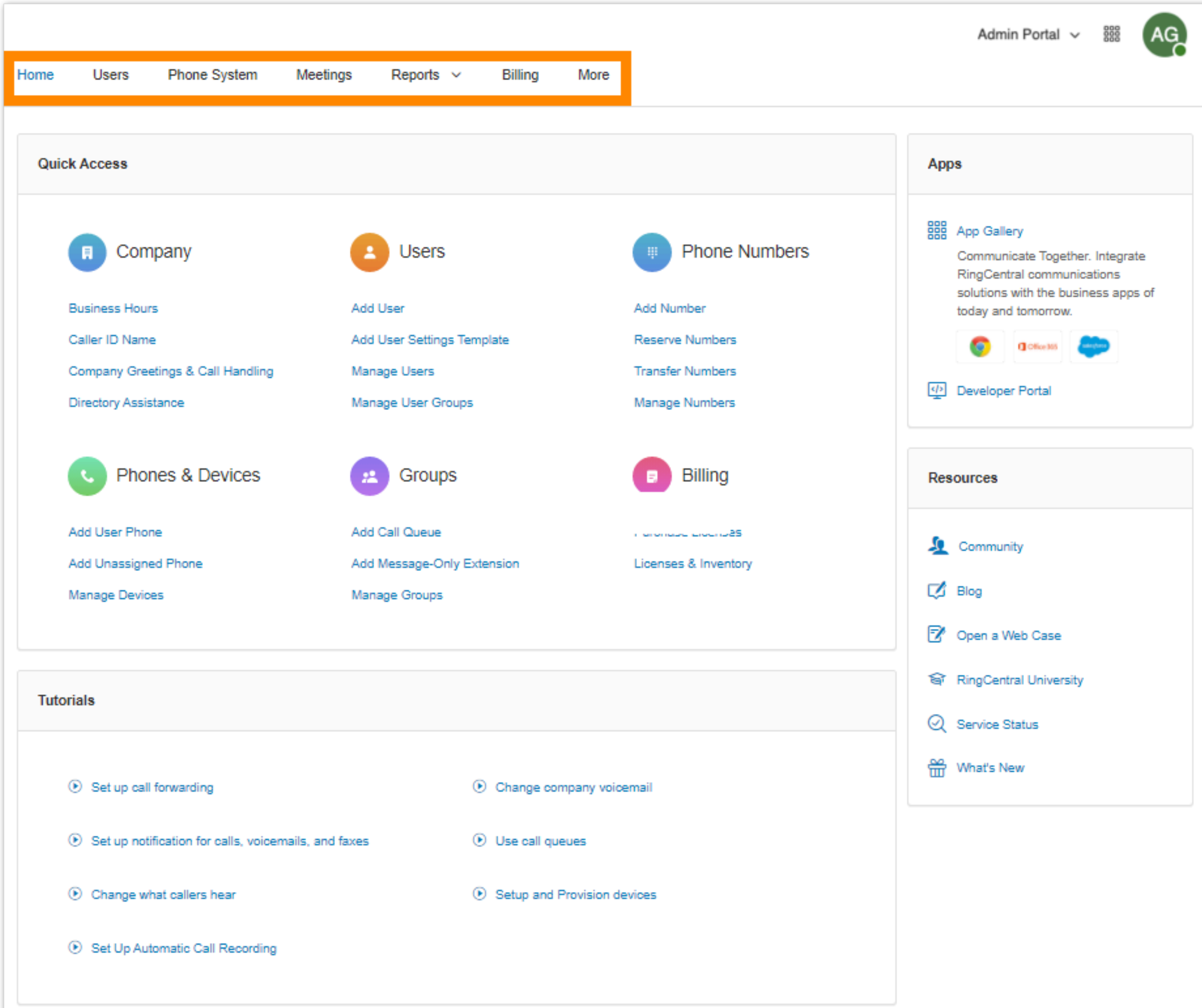
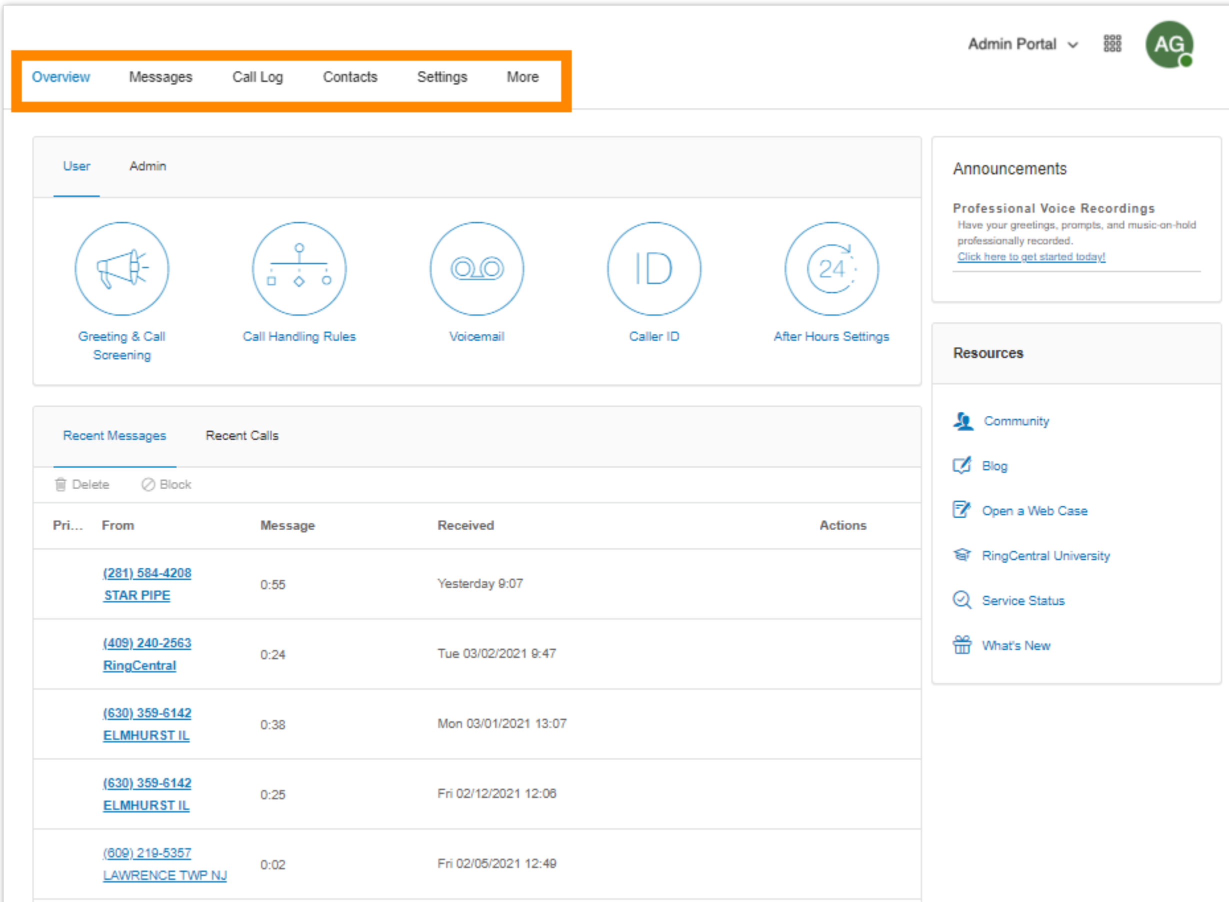

Admin Portal
AG
Home
Users
Phone System
Meetings
Reports
Billing
More
Quick Access
Company
Business Hours
Caller ID Name
Company Greetings & Call Handling
Directory Assistance
Users
Add User
Add User Settings Template
Manage Users
Manage User Groups
Phone Numbers
Add Number
Reserve Numbers
Transfer Numbers
Manage Numbers
Phones & Devices
Add User Phone
Add Unassigned Phone
Manage Devices
Groups
Add Call Queue
Add Message-Only Extension
Manage Groups
Billing
Licenses & Inventory
Apps
App Gallery
Communicate Together. Integrate RingCentral communications solutions with the business apps of today and tomorrow.
Developer Portal
Resources
Community
Blog
Open a Web Case
RingCentral University
Service Status
What's New
Tutorials
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.



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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.

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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*.

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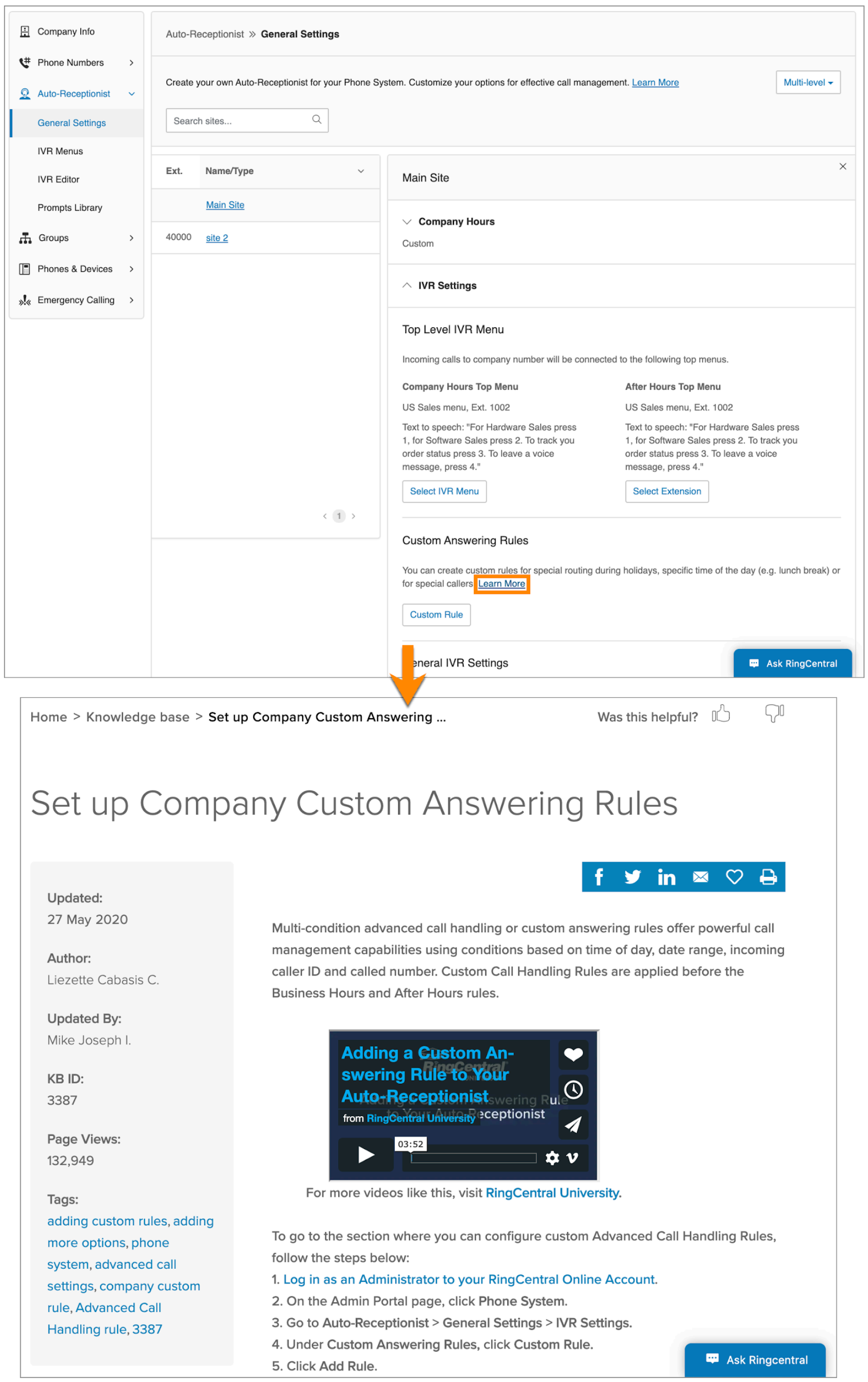
Product help

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.



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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 dialpad 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.

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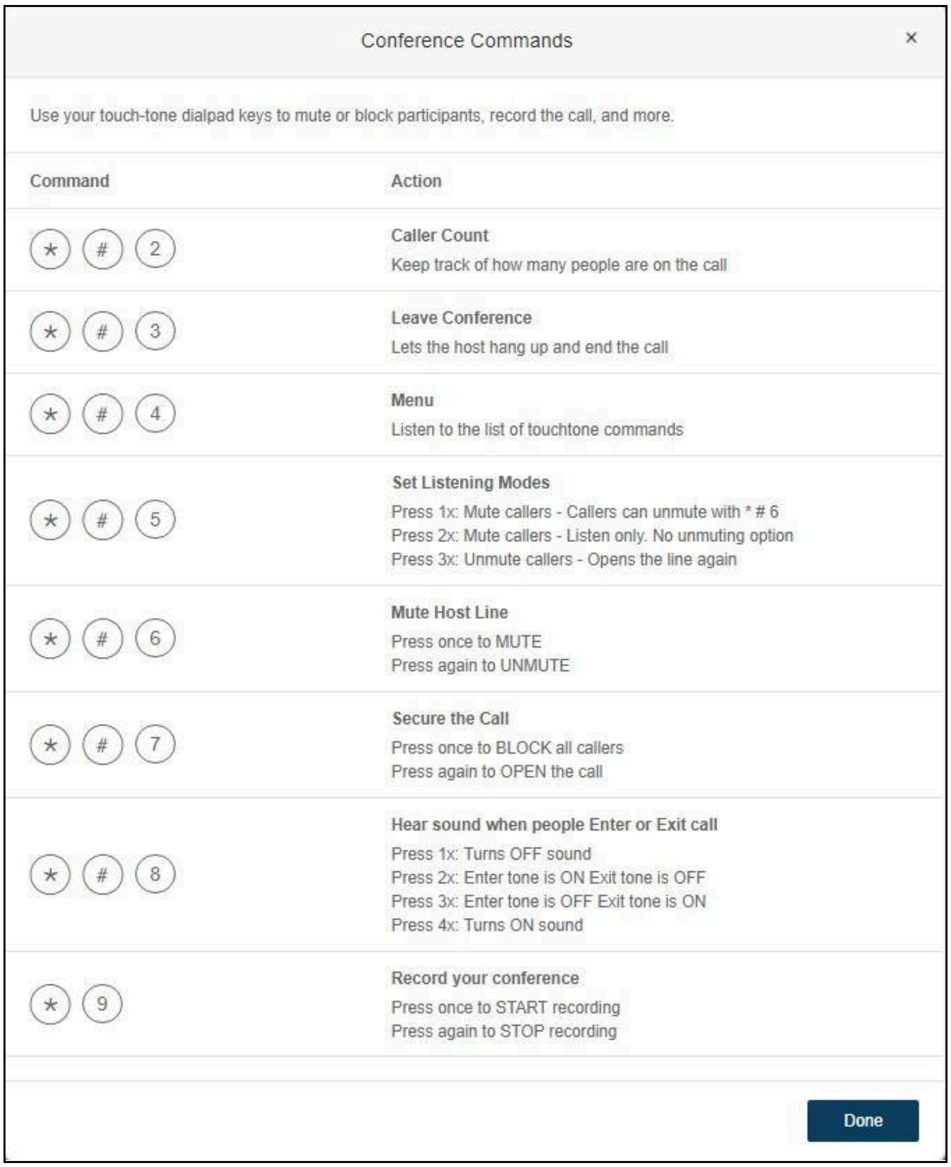
Conference commands

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.



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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.

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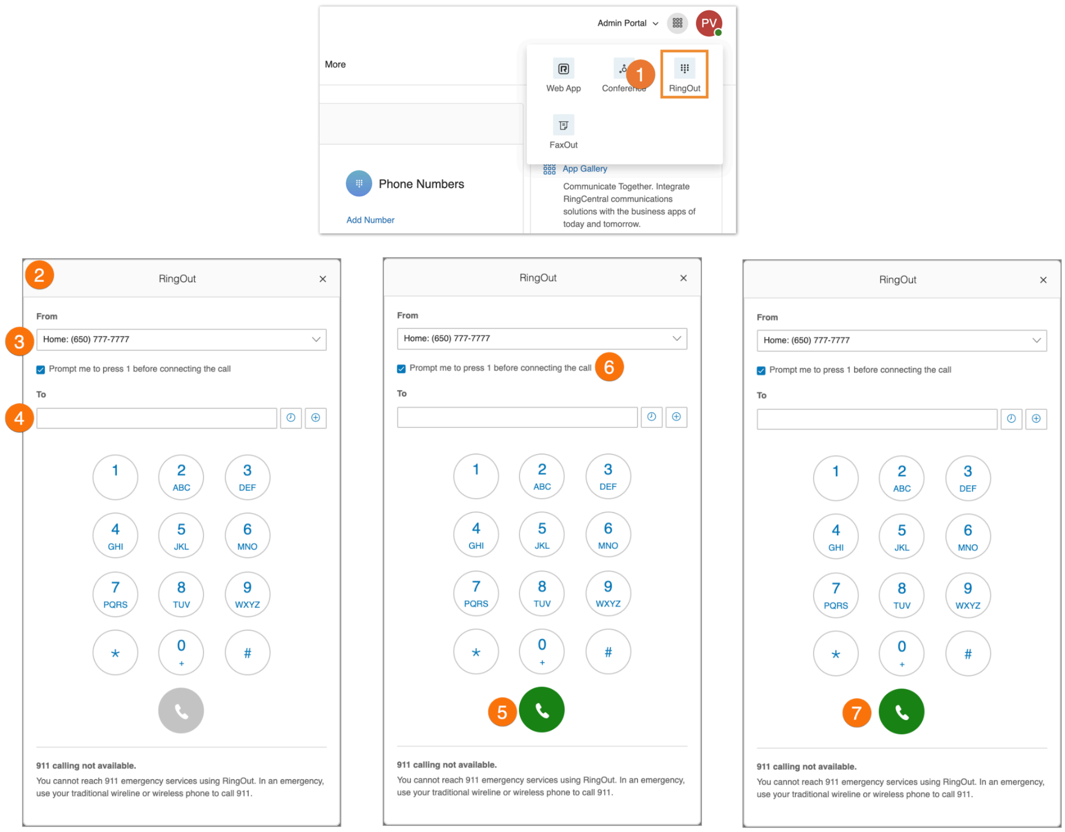

FaxOut

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**.

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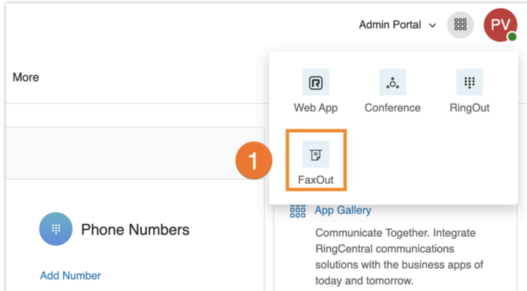

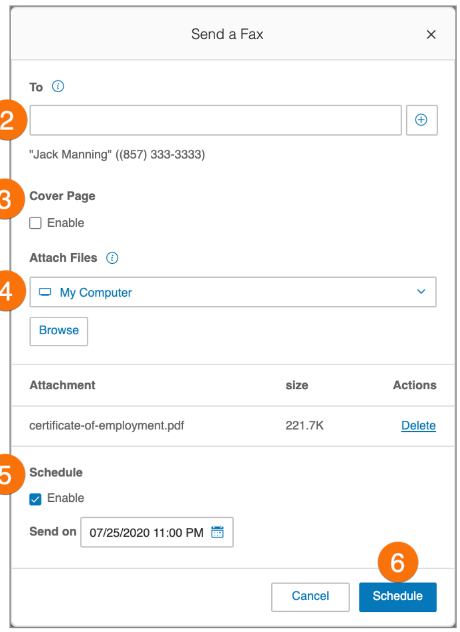

Managing email-to-fax compliance

Customers who do not have the proper security parameters for their email service create the following risk/concerns:

- Email can easily be spoofed, allowing a malicious actor to impersonate customers and send faxes from customers email-to-fax
- E2F are pay per usage and result in large bills or sending to numbers that charge us
- Risk of potential fines from regulatory bodies

Company-level administrators can enable security measures to protect admins and users from using non-compliant email addresses.

1. Go to **More > Account Settings > General Settings**.
2. Toggle the switch on or off next to **Allow this account to send faxes using Email-to-fax**.
3. Tick the box that confirms your email domain **meets required security settings**.
4. Click **Turn on**.

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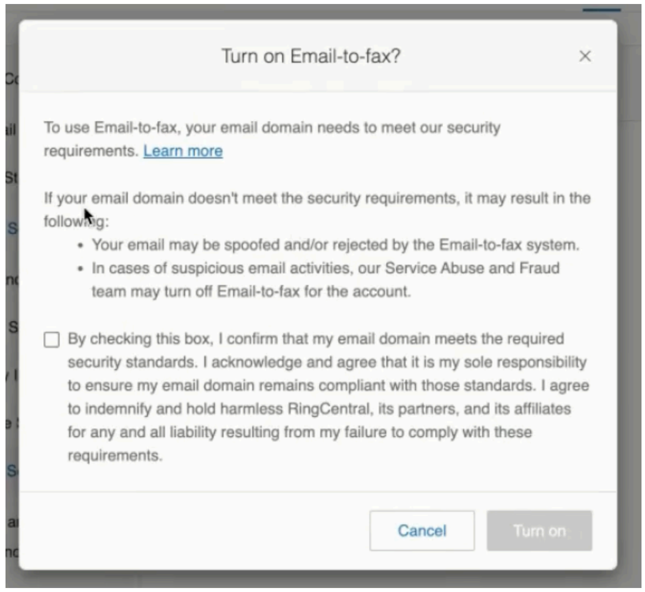
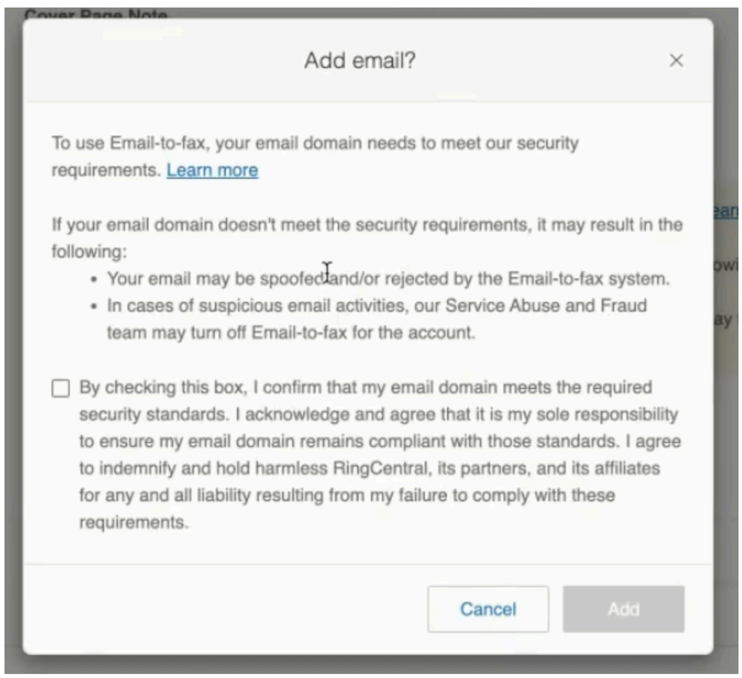


When an administrator or user attempts to add an email address under **Faxes Sent via Email**, they will see a legal disclaimer.



Setting up the Forward all calls feature

The **Forward all calls** feature allows you to easily forward all your incoming calls when you're unable to answer. You can forward incoming calls to a voicemail, coworker, external number, call queue,

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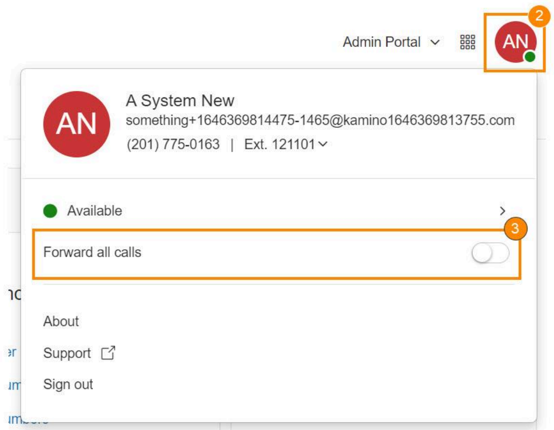
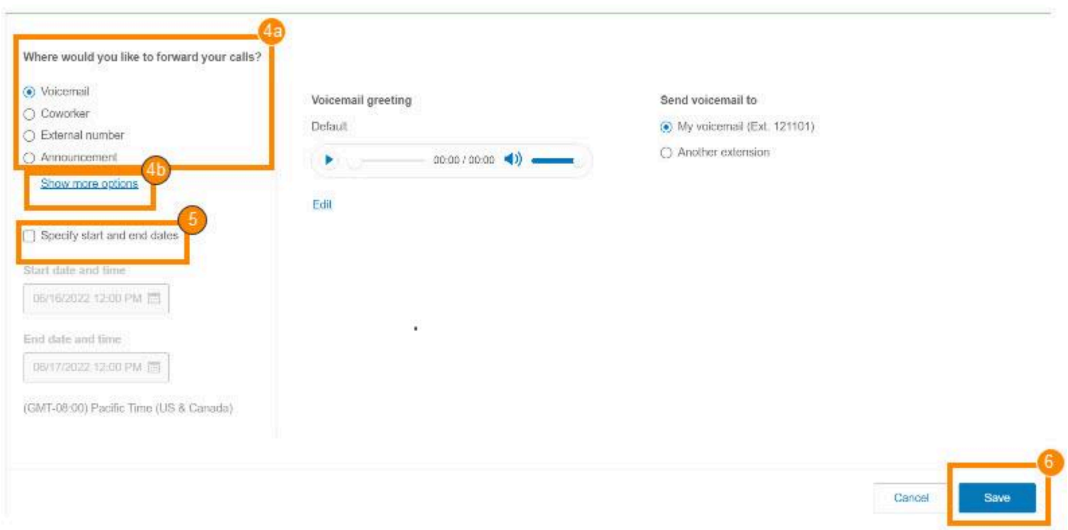
announcement, IVR menu, or other locations. You can also schedule the time period when the incoming calls should be forwarded.

1. Go to the [Admin Portal] and sign in.
2. Click your profile at the top right.
3. Turn on the toggle for **Forward all calls.**



4. Click the button next to one of the options under Where would you like to forward your calls?. Click **Show more** options to see the complete list.
5. Check the box for **Specify start and end dates** to set start and/or end dates or times (optional). This feature is useful for forwarding calls around your break or vacation schedule.
6. Click **Save.**



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A banner will appear at the top of the RingCentral Admin Portal page to remind you when your calls are forwarded. You can click **Edit** in the banner to modify your call forwarding settings or click **Turn off** to stop forwarding your calls.

Where to forward your calls

- **Voicemail:** Forward calls to your voicemail box. You can play and customize your voicemail greeting.
- **Coworker:** Forward calls to a coworker. Type the coworker's name or extension number in the search box, then click on the desired coworker.
- **External number:** Forward calls to an external number, such as an answering service.
- **Announcement:** Play an announcement. You can play and customize the greeting.
- **Call queue:** Forward calls to a call queue. Type the call queue name or extension number in the search box, then click on the desired call queue.
- **Delegated line:** Forward calls to a delegated line. Type the delegated line name or extension number in the search box, then click on the desired delegated line.
- **Shared line:** Forward calls to a shared line. Type the shared line name or extension number in the search box, then click on the desired shared line.
- **Limited extension:** Forward calls to a limited extension. Type the limited extension name or extension number in the search box, then click on the desired limited extension.
- **IVR menu:** Forward calls to an IVR menu. Type the IVR menu name or extension number in the search box, then click on the IVR menu line.

Note:

- To use the **Forward all calls** features, the **User Settings - Call handling** permission is required. If the user doesn't have this required permission, the Forward all calls feature won't be available to them. For more information, go to List of User Permissions.
- When **Forward all calls** and Do Not Disturb (DND) are both turned on, calls will be forwarded according to your **Forward all calls** settings.

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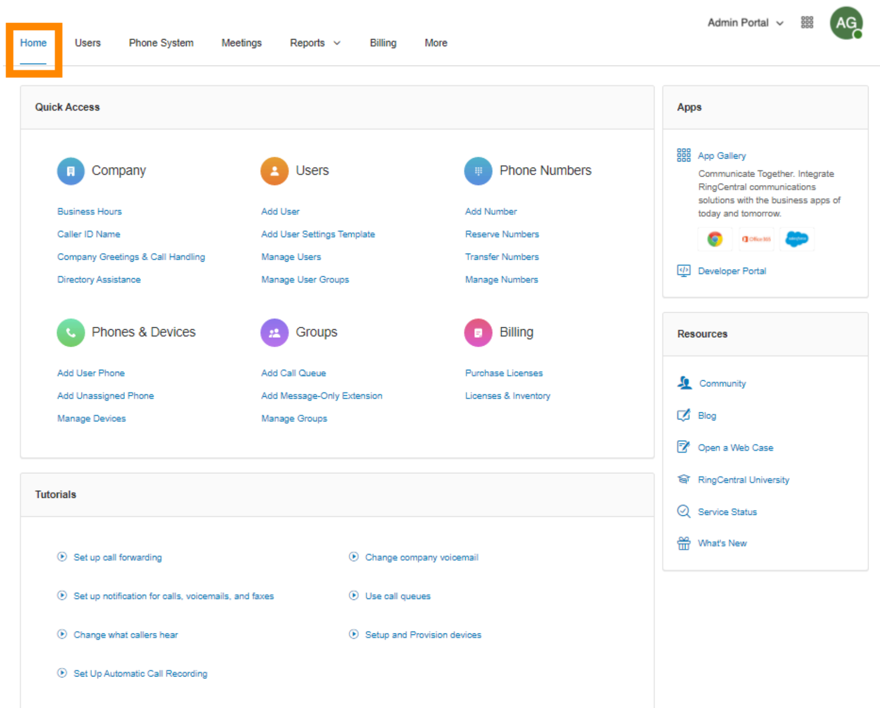
Home tab

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:

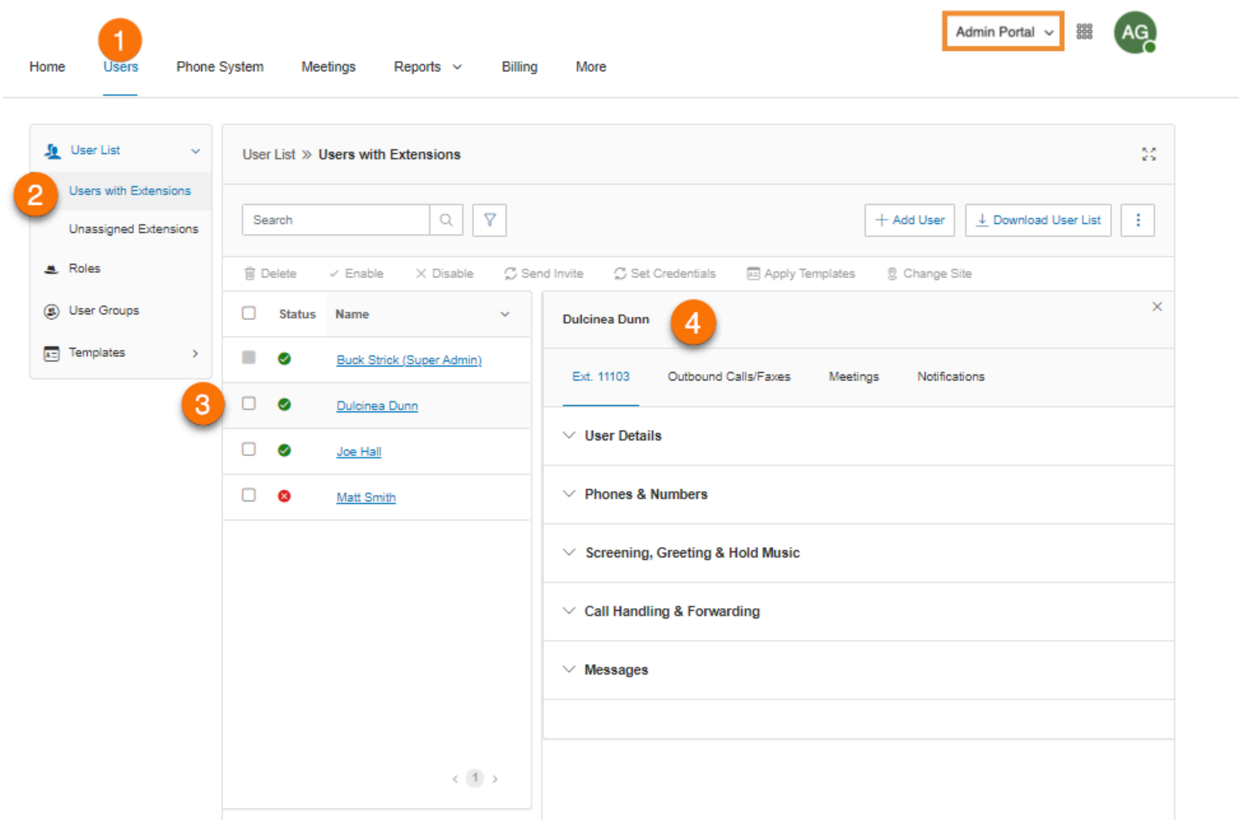
- Community
- Blog
- Open a Web Case
- RingCentral University
- Service Status
- What's New

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.



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 the far right of the extension.
   b. Click **Delete** to delete the extension.

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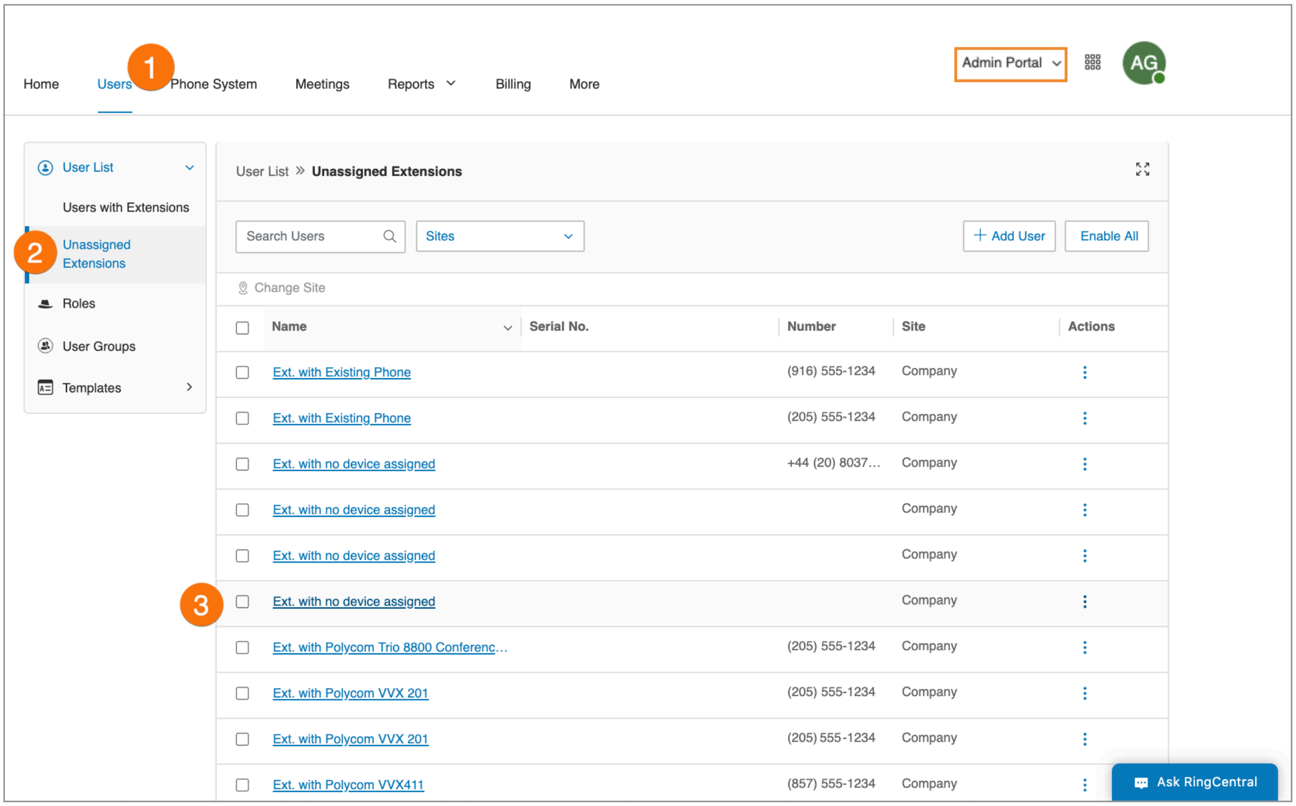
The user interface shown is for accounts with two or more users. Accounts with one user will see a different interface.



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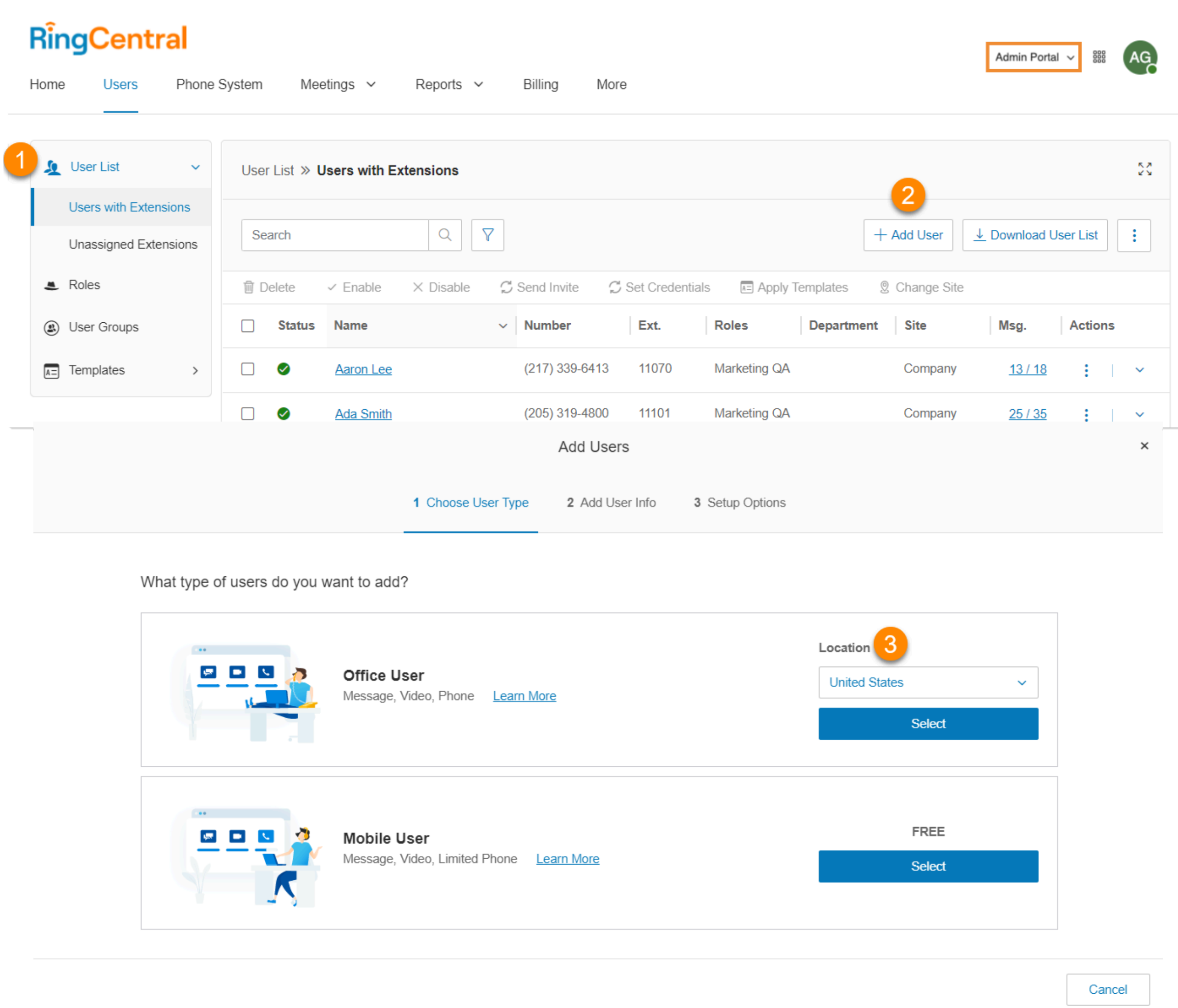
Adding users with devices

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.



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

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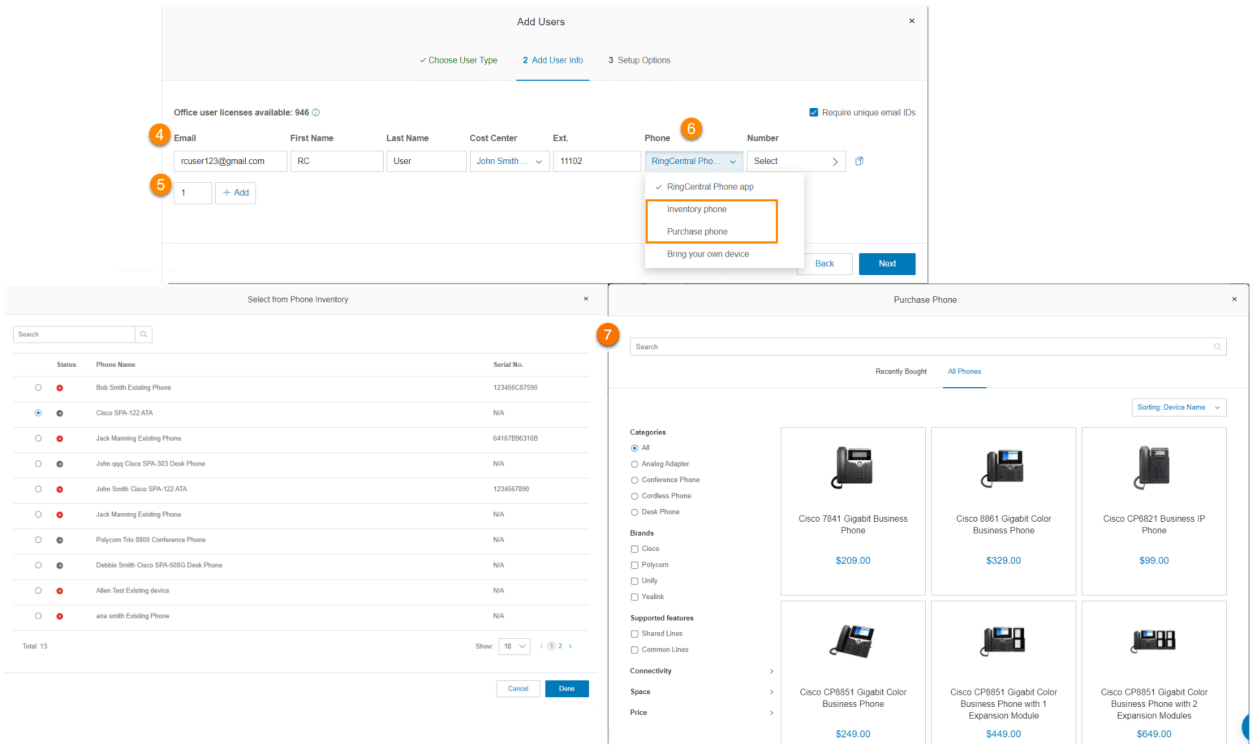
create a new row to add a user and retain the selection details, except for first name, last name, and email.

6. Make a selection under **Phone**. Options include *RingCentral app*, *Inventory phone*, *Purchase phone*, and *Bring your own device*. RingCentral app is selected automatically.

   Note: For older RingCentral accounts, you will have the RingCentral Phone as your softphone device type instead of RingCentral App.

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.



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**.

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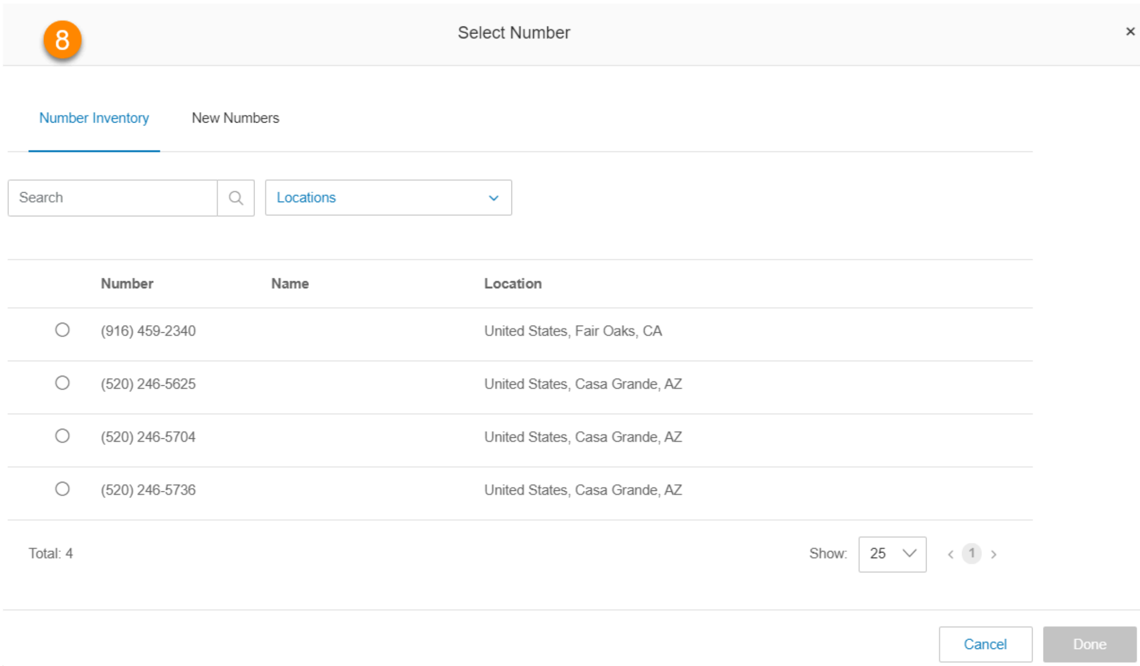

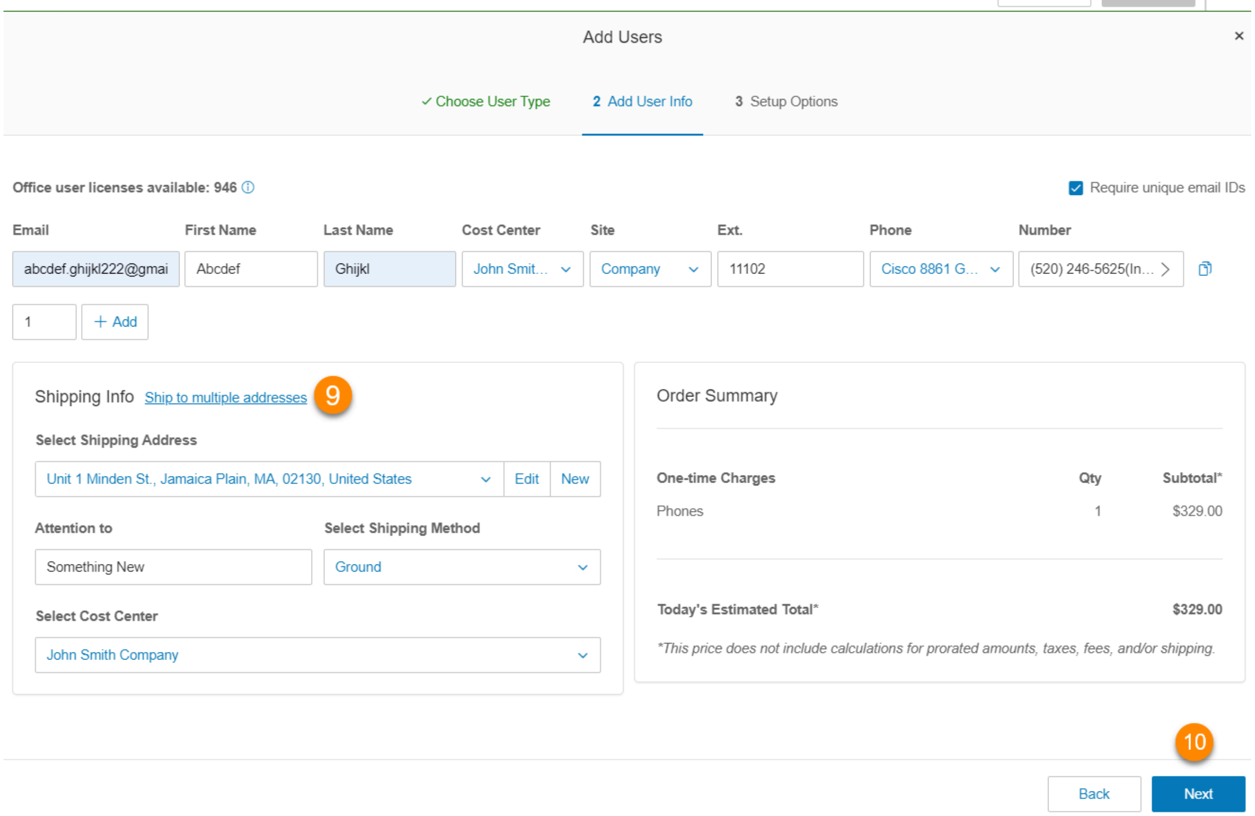

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Setting up users

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

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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.

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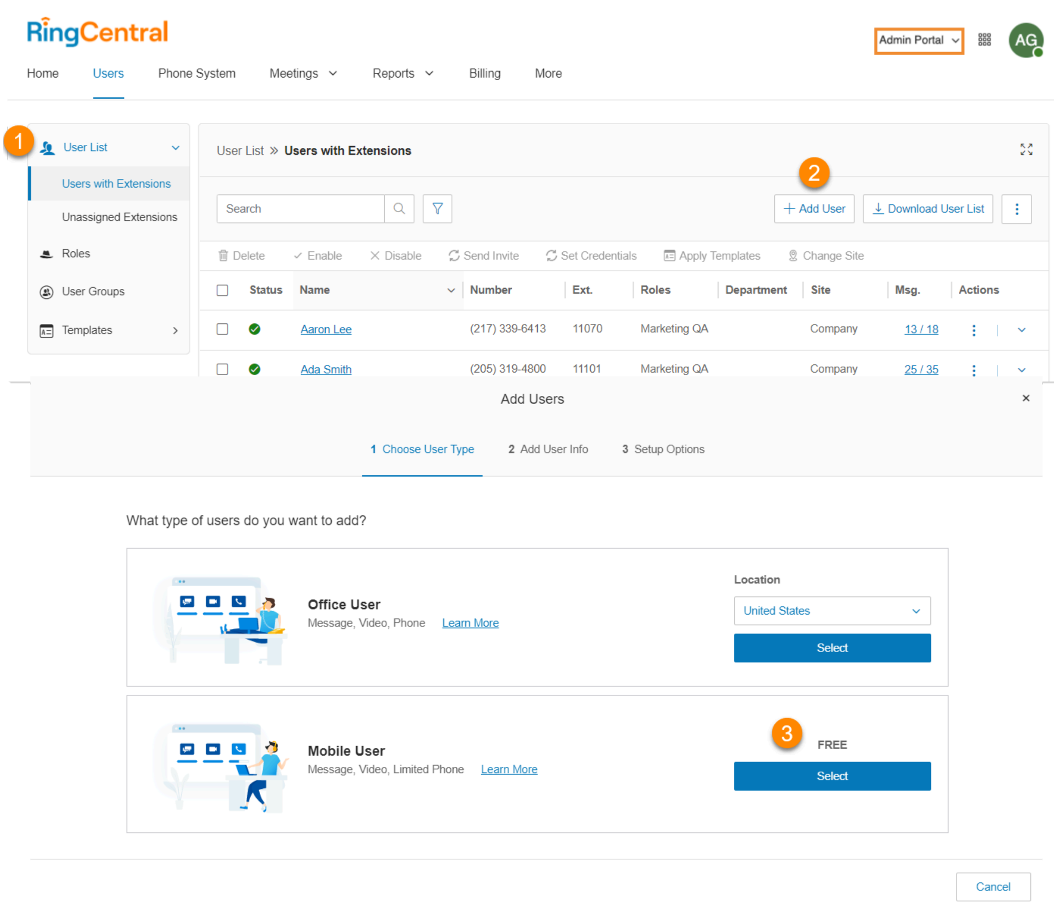

4. Fill in the basic information about the user. **Require unique email IDs** is checked by default. You can uncheck it if you don't want this option. Note that if this is unchecked, users cannot be invited by email.
5. If you'd like to add more users, enter the number on the field provided, then click **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. Click **Next**.

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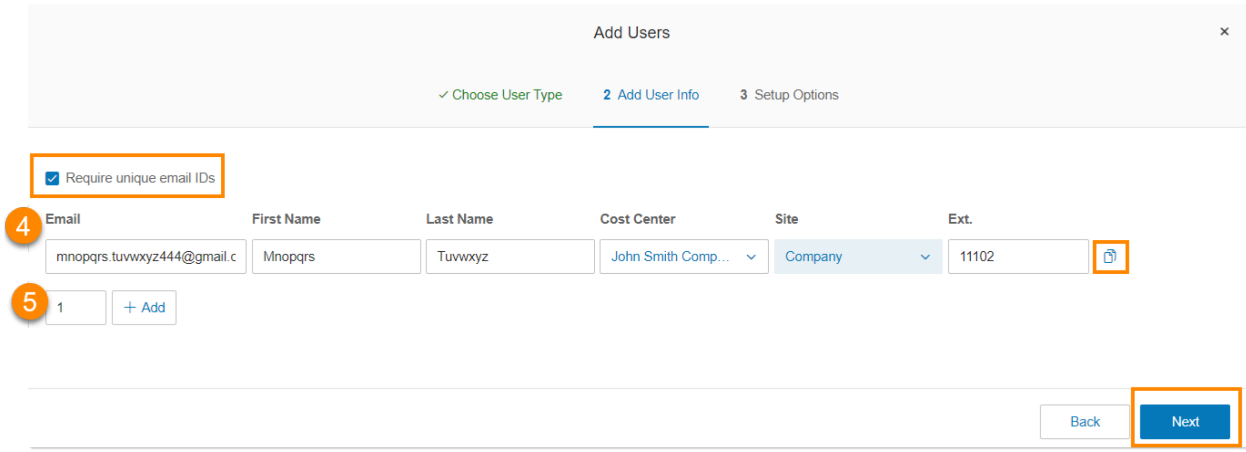

Setting up free users

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

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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**.

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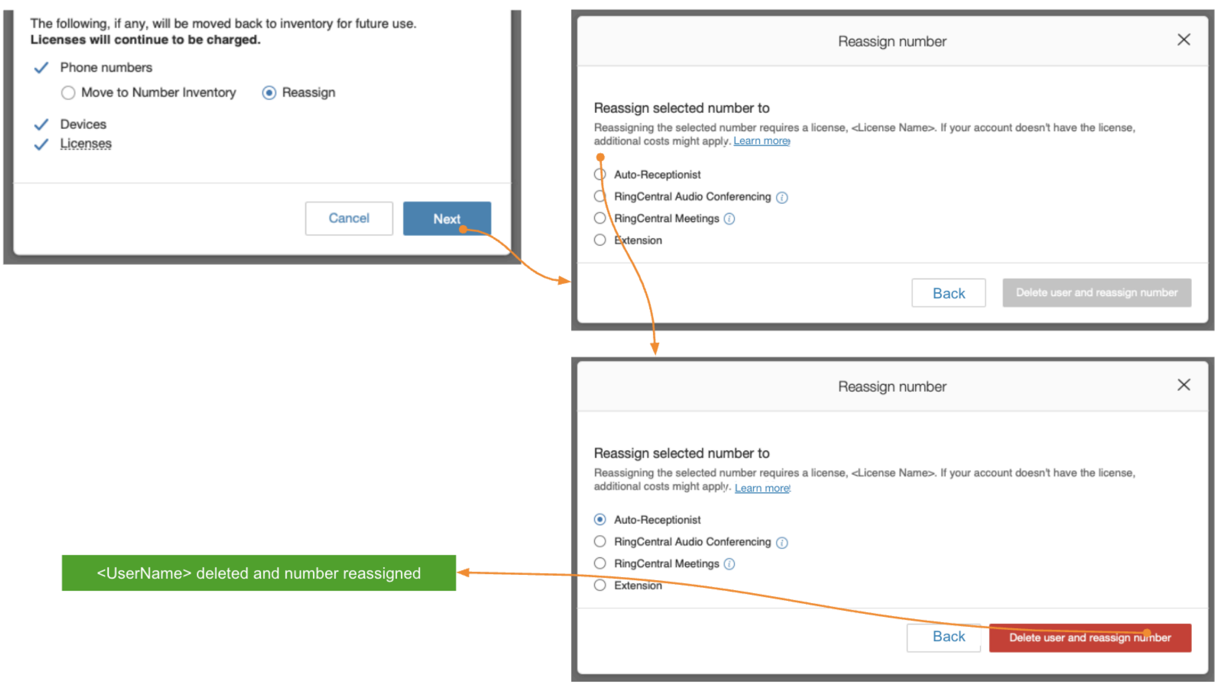
Deleting users and reassigning phone numbers

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.

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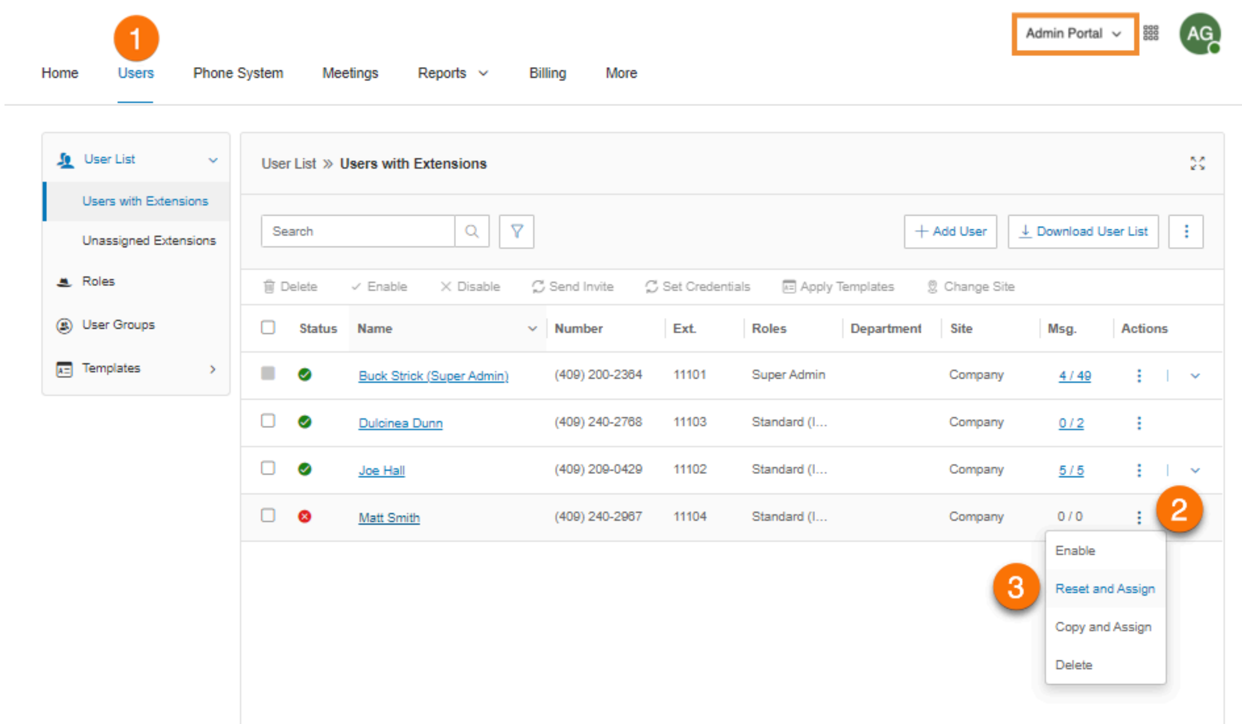
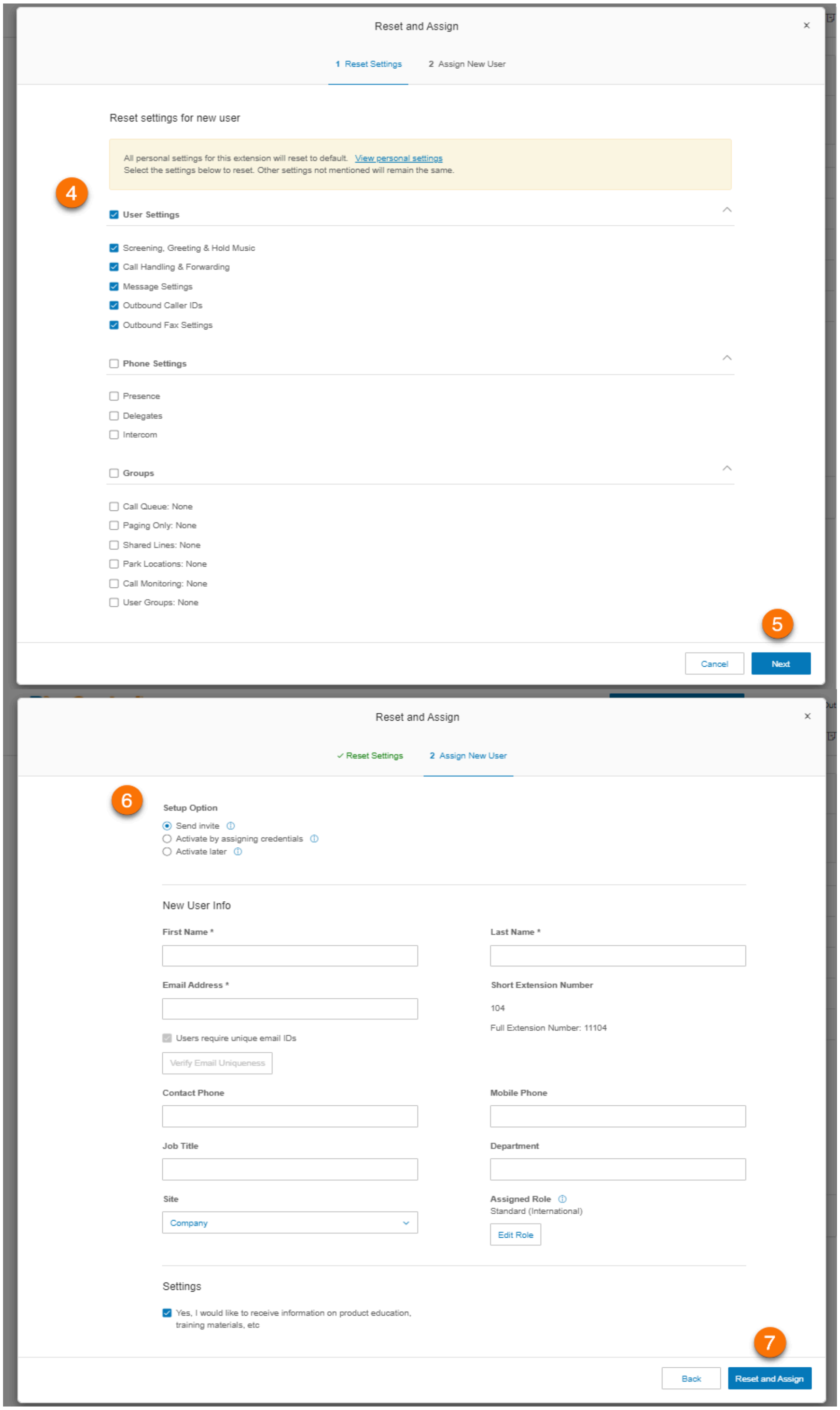
Resetting and assigning a user

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](#).





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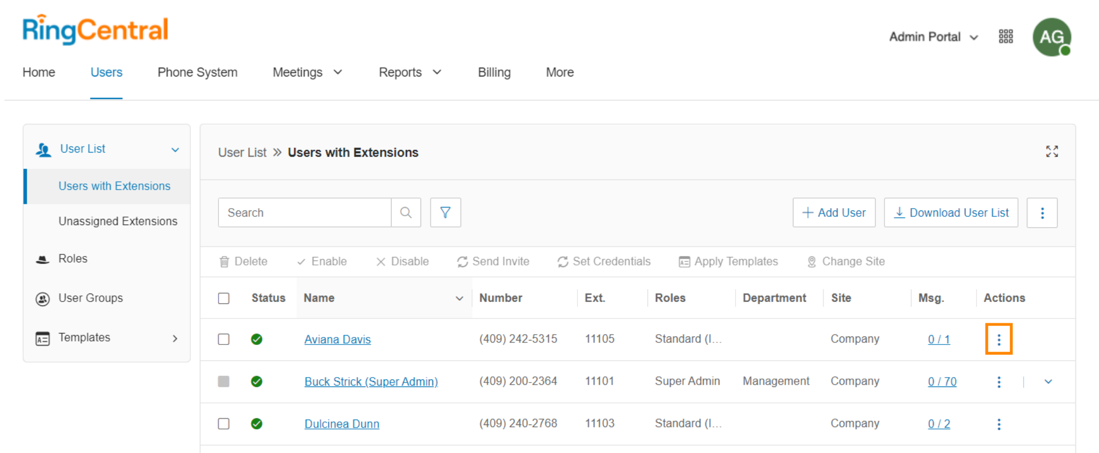
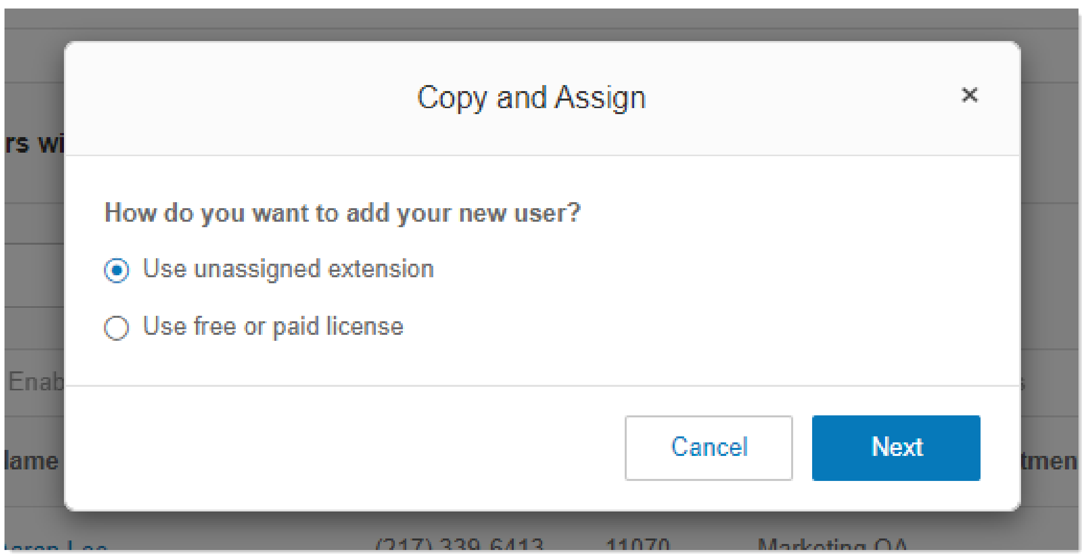
Copying and assigning existing user settings using an unassigned extension

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**.

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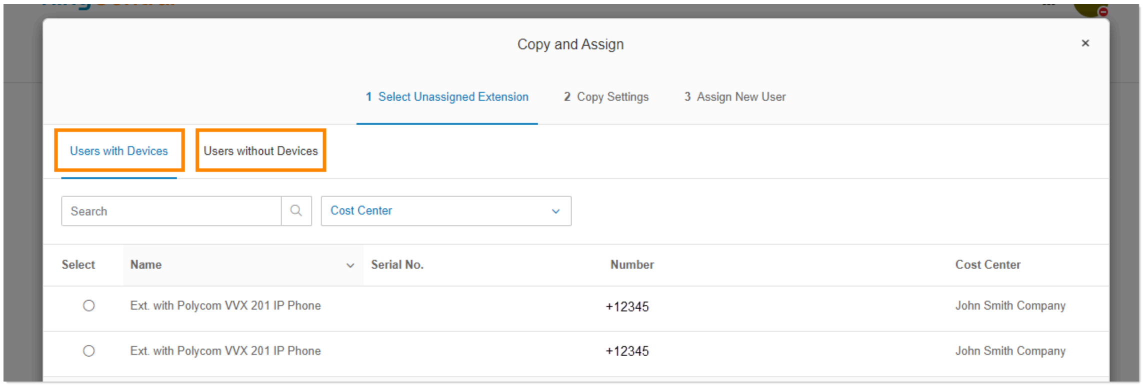
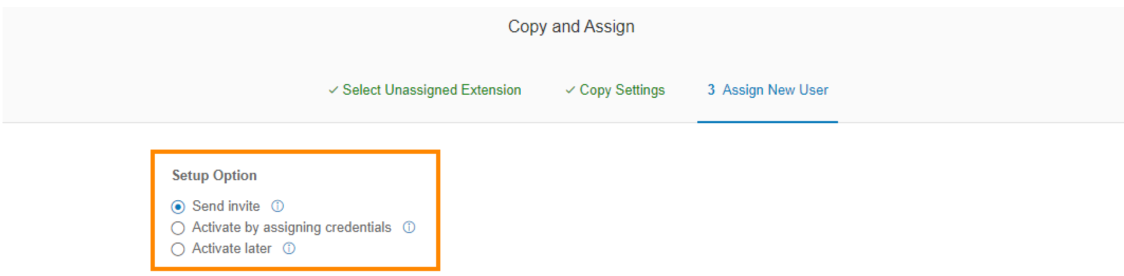


6. Select the settings you want to be copied. Any settings not selected will be set to default. Click **Next**.
7. Choose a **Setup Option**. Options include Send invite, Activate by assigning credentials, and *Activate later*.



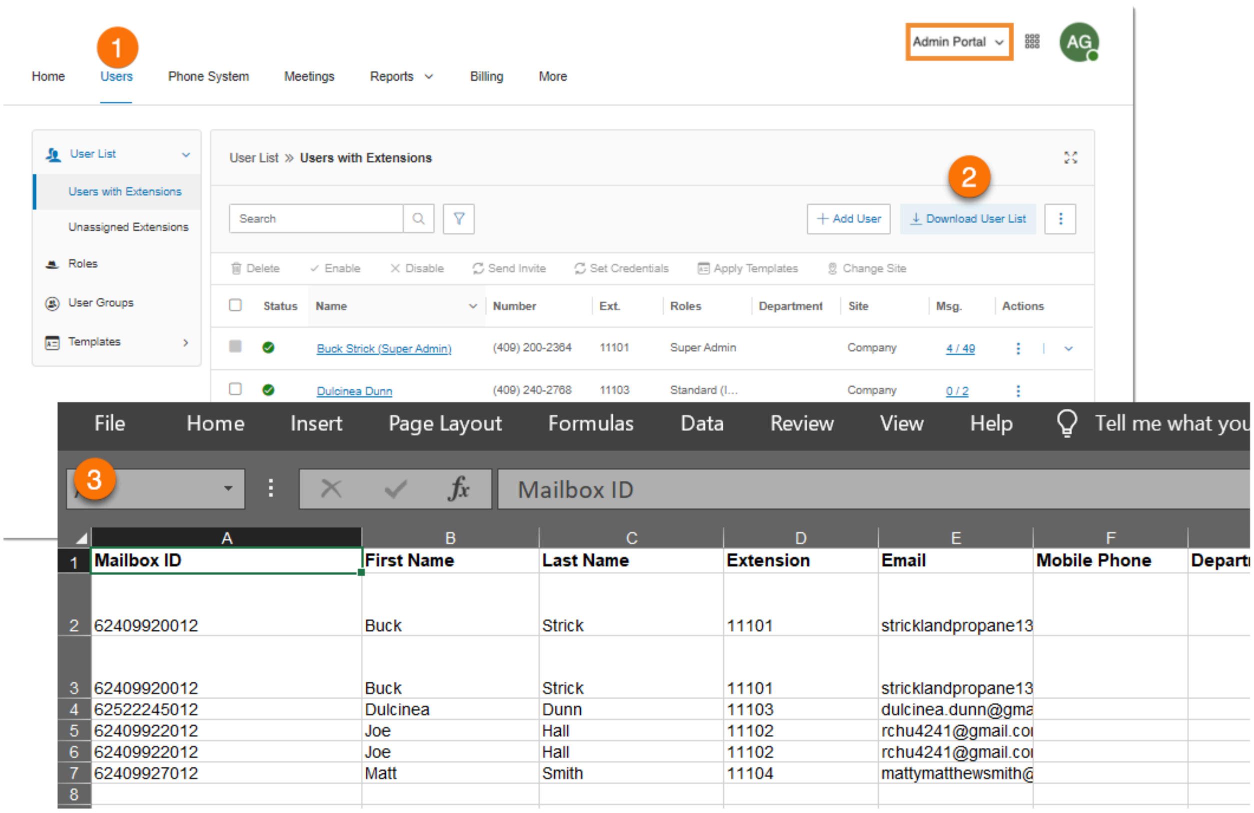
8. Click **Copy and Assign**.

Exporting a user list

Exporting a User List

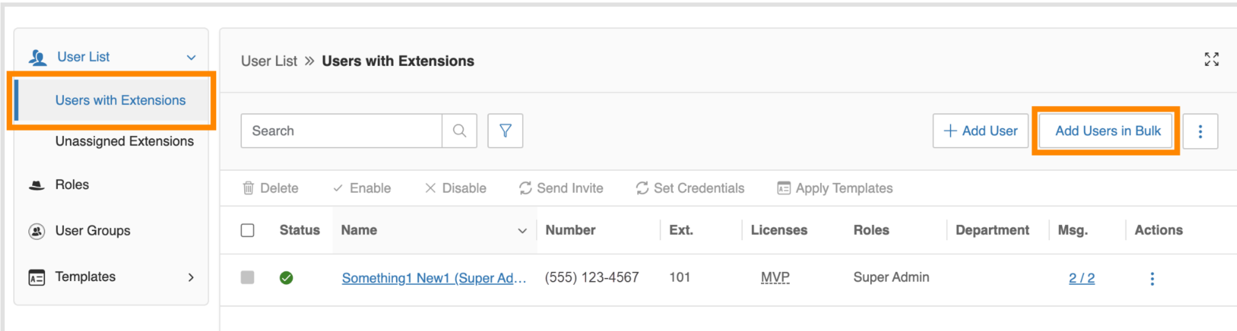
You can export a list of users and extensions in Microsoft Excel file format. You can use this feature to create a company directory or to perform an audit of users.

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.



Bulk adding and editing users

1. Go to the Admin Portal and sign in.
2. Go to **Users > User List > Users with Extensions**.
3. Click **Add Users in Bulk**.



4. Click **Download template**.
5. Choose the values you want to include in the template and select the file format.
6. Enter your email to receive the template, and then click **Download**.

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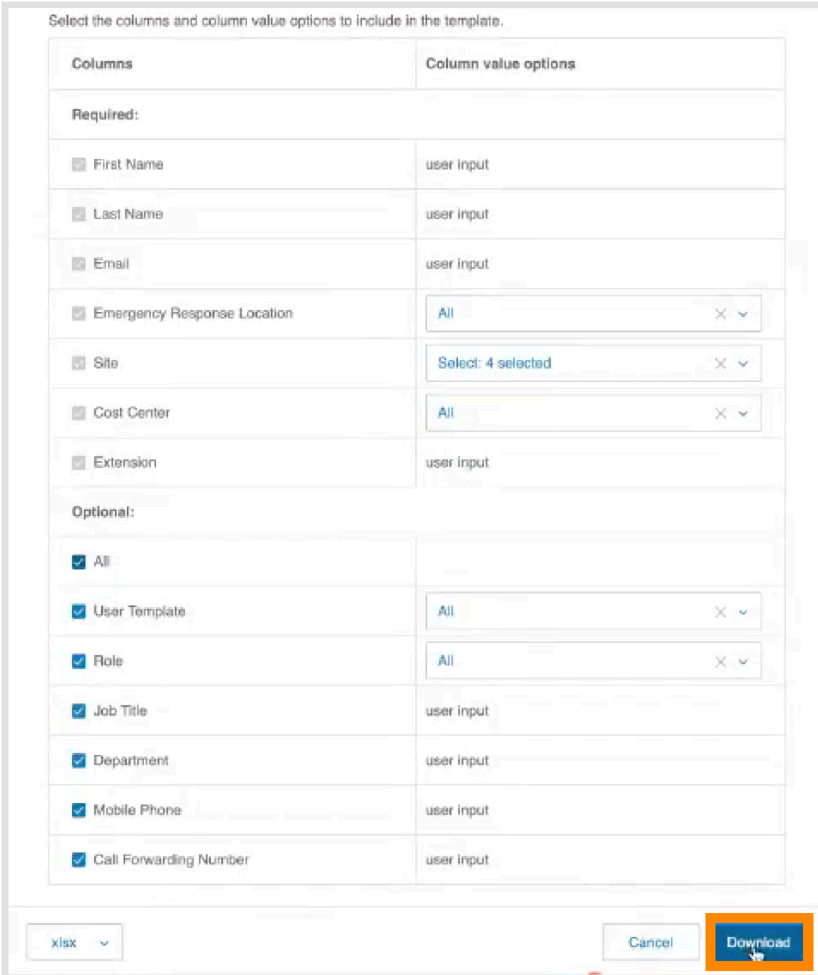

7. Fill out the template with your users' information. Learn more.
8. After entering the required template information, click **Browse** to upload the template file. It may take up to an hour to process the file.
9. Select **Do your users have unique emails?** if you require users to have unique email addresses. This option may be available only when you want to activate users at a later time or by assigning credentials.
10. Select the **Setup Option**. You can select the following options:
    a. **Send invite**: Set up a user by sending a welcome email with an activation link.
    b. Activate by assigning credentials: Set up and activate a user by assigning credentials. No welcome email will be sent.
    c. **Activate later**: Set up a user now but activate at a later time. No welcome email or notifications will be sent.
11. An email will be sent to the Super Admin, and the results will be announced in a few minutes. Enter the email addresses in the field that you want the upload result email to be sent.
12. Click **Save**.

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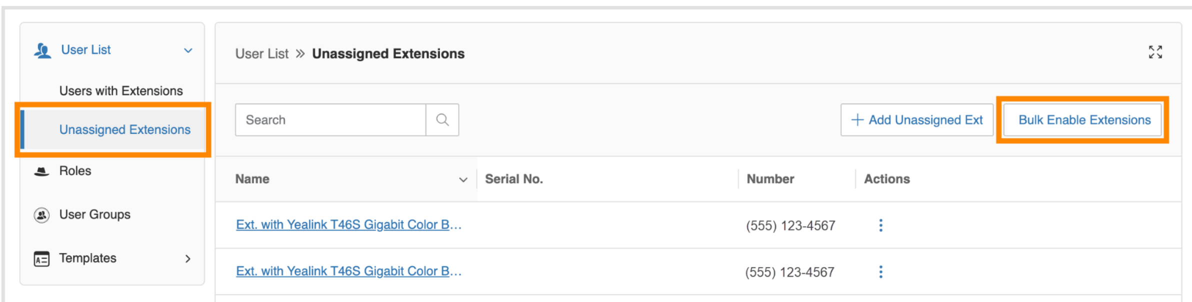
Note: Import will fail if a Contact Name on your list has the following symbols: <, >, /, ". Before importing, avoid using these four symbols in the **First Name** and **Surname** fields from the CSV file. The upload will not be successful when one of these symbols is used. An email notification will be sent to the added email address(es) without the .xls file, which will indicate the reason(s) why it failed.

Bulk enabling unassigned extensions

1. Go to the Admin Portal and sign in.
2. Go to Users > Unassigned Extensions.
3. Click Bulk Enable Extensions.



4. Click **Download template**.
5. Choose the values you want to include in the template and select the file format.
6. Enter your email to receive the template, and then click **Download**.

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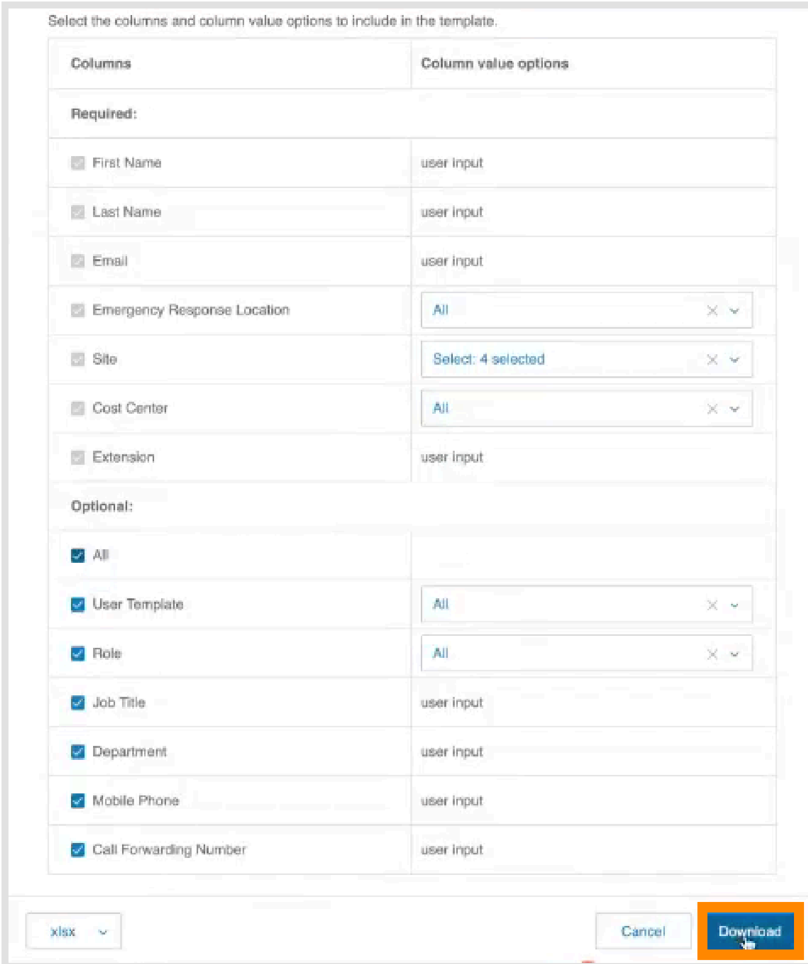

7. Fill out the template. Learn more
8. After entering the required template information, click **Browse** to upload the template file. It may take up to an hour to process the file. Any updates made to license assignments during this time may not be reflected in the file.
9. Select **Do your users have unique emails?** if you require users to have unique email addresses. This option may be available only when you want to activate users at a later time or by assigning credentials.
10. Select the **Setup Option**. You can select the following options:
    a. **Send invite**: Set up a user by sending a welcome email with an activation link.
    b. **Activate by assigning credentials**: Set up and activate a user by assigning credentials. No welcome email will be sent.
    c. **Activate later**: Set up a user now but activate at a later time. No welcome email or notifications will be sent.
11. An email will be sent to the Super Admin, and the results will be announced in a few minutes. Enter the email addresses in the field that you want the upload result email to be sent.

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12. Click **Save**.

Note: Import will fail if a Contact Name on your list has the following symbols: <, >, /, ". Before importing, avoid using these four symbols in the **First Name** and **Surname** fields from the CSV file. The upload will not be successful when one of these symbols is used. An email notification will be sent to the added email address(es) without the .xls file, which will indicate the reason(s) why it failed.

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).

Upgrading user licenses to RingEX in bulk

You can upgrade multiple users from Video Pro licenses to RingEX licenses at the same time:

1. Go to the Admin Portal and sign in.
2. Go to **Users > Users with Extensions**.
3. Click the three-dot **More** icon at the top right and choose **Upgrade to RingEX licenses in bulk** from the dropdown.

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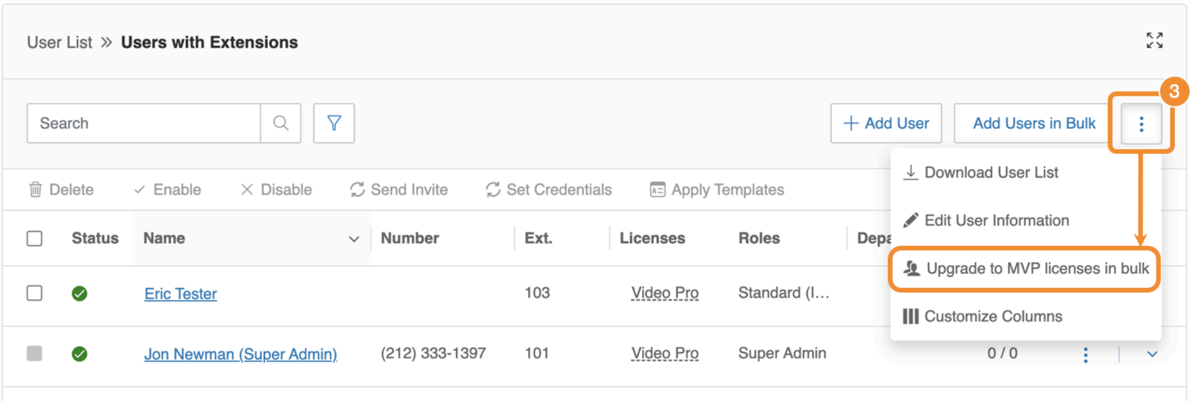
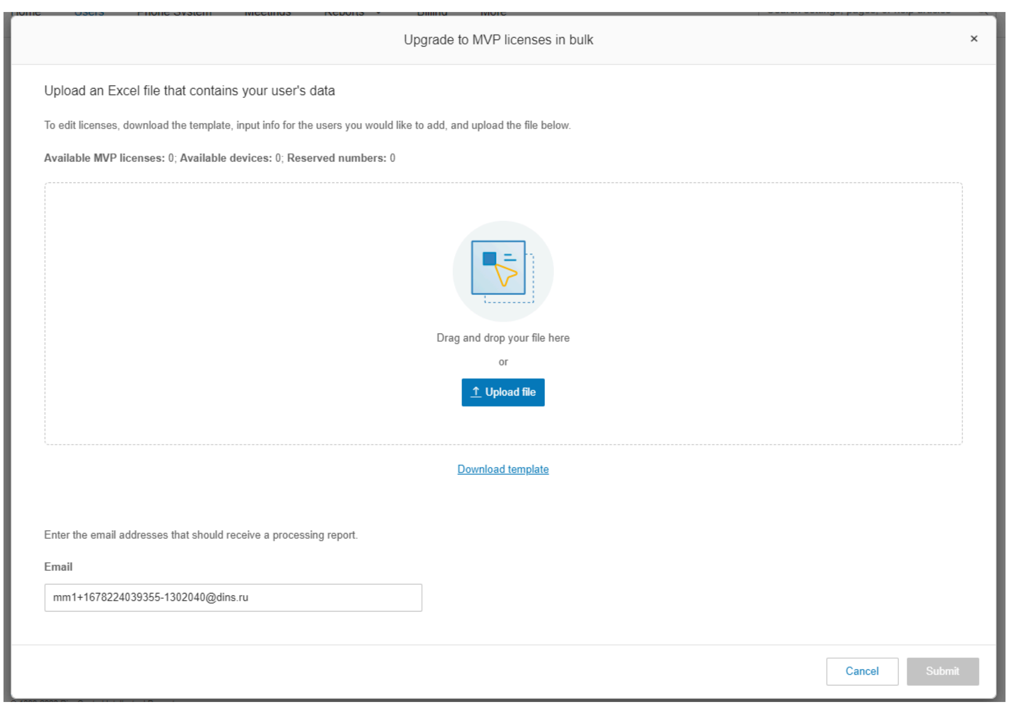


4. Click **Download template**. Open the bulk upgrade template file, enter the required information, and save. To learn more, visit Editing a template to add assigned extensions in bulk.
5. Click **Upload file** to upload the template you've filled out.
6. Enter your email address to receive a processing report when the upload finishes.
7. Click **Submit**.



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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.

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Managing User Settings

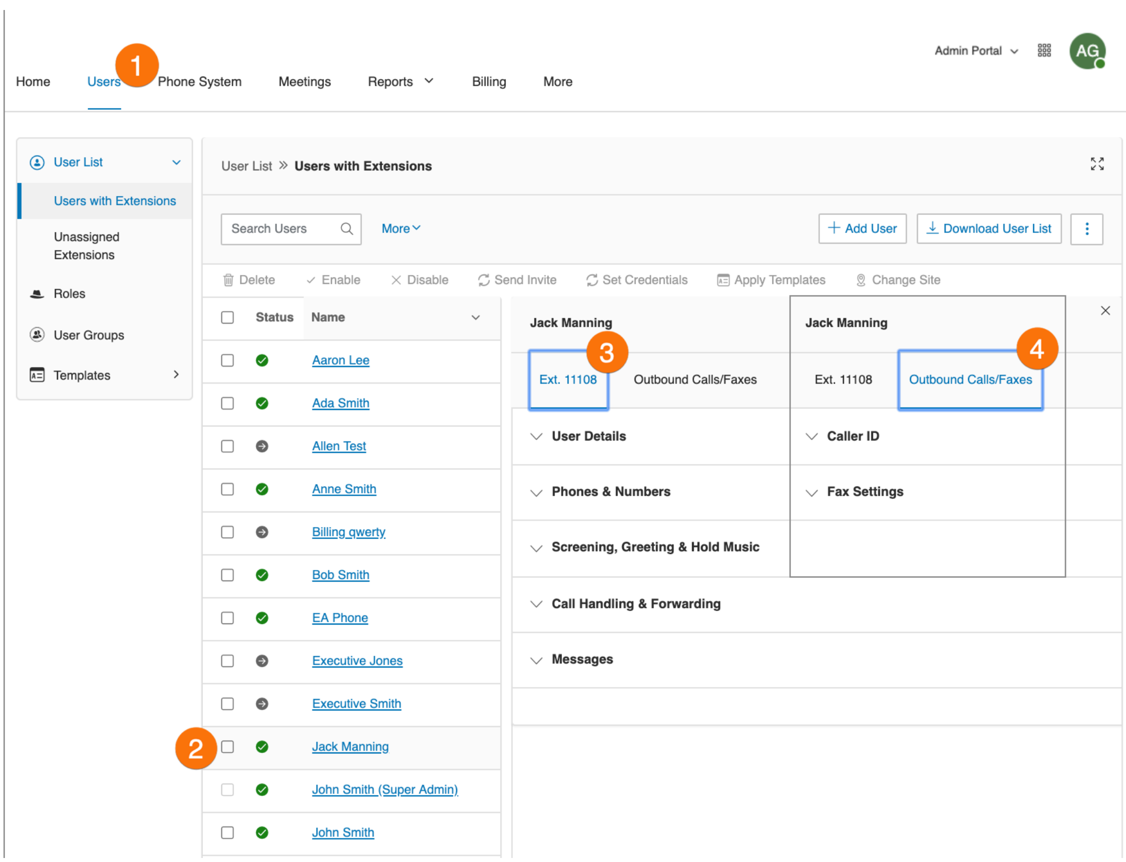
Admins can edit the following user settings:

- 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**)



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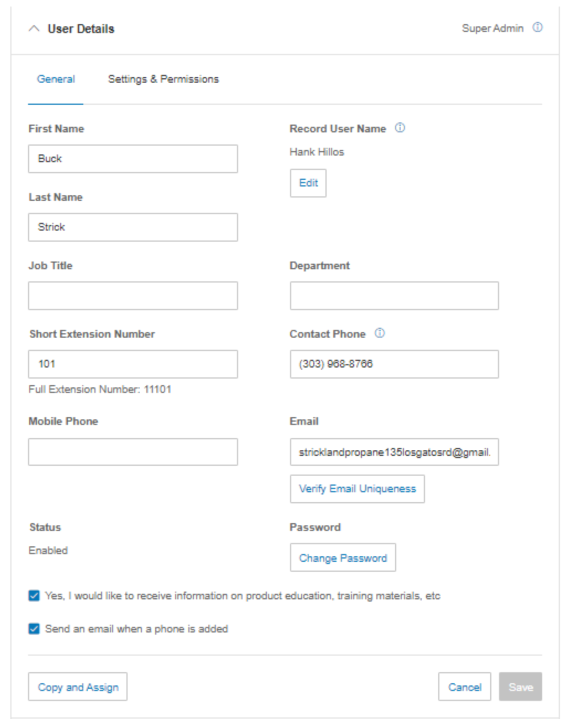
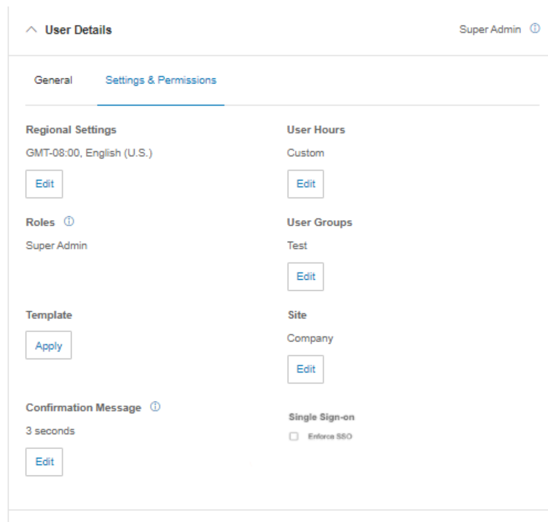
User details

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.





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.

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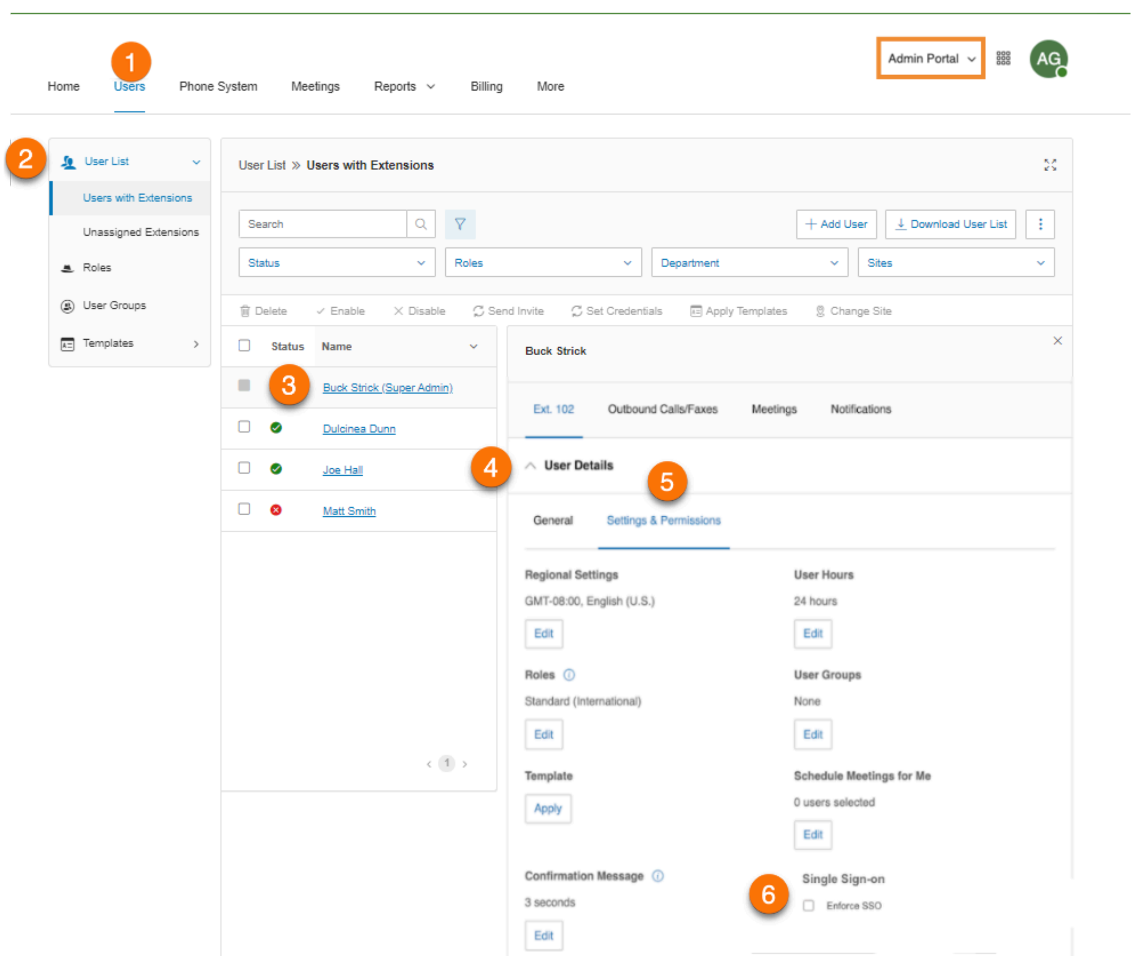
Before you can change the SSO policy at the user extension level, ensure first that you have configured the SSO settings and have enabled the SSO service on your account. For more information, navigate to **Single sign-on**.

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](#).



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Hiding users from your Company Directory

Company Directory Control enables admins to take control of the company contacts shown on employees' clients. Through this feature, you can hide specific contacts in your company directory from being seen in the RingCentral app.

Note: Other users can still contact hidden users by directly dialing the number or by entering the email when creating a new message.

For more information about checking your company contacts, visit Managing your company contacts in the RingCentral app desktop and web.

1. From the Quick Access home page, click **Manage Users** under the **Users** column. Alternatively, you can navigate to **Users > User List > Users with Extensions.**
2. Select the user you want to manage.
3. Click **User Details.**
4. Tick or untick the checkbox for **Include User in Company Directory.**

Once a user is hidden, they cannot be directly contacted through phone, message, or video via the RingCentral app. However, other users can still call a hidden user by directly dialing the number or messaging them by directly typing their email when creating a new message.

Unpublishing user's non-extension numbers

Once the direct number, contact phone, or mobile phone number of a user is unpublished, the hidden number will not be shown in the user's profile in the RingCentral app. The hidden number cannot be searched and contacted through phone.

However, other users can still call the hidden number by directly dialing the exact phone number.

1. From the Quick Access home page, click **Manage Users** under the **Users** column. Alternatively, you can navigate to **Users > User List > Users with Extensions**.
2. Select the user you want to manage.
3. Click **Phones and Devices**.
4. Click **Unpublish** on the non-extension number/s you want to hide.

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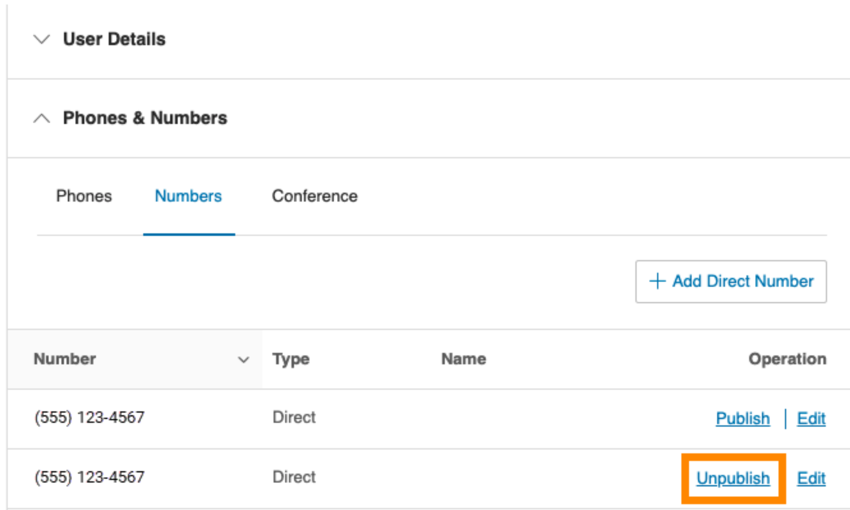
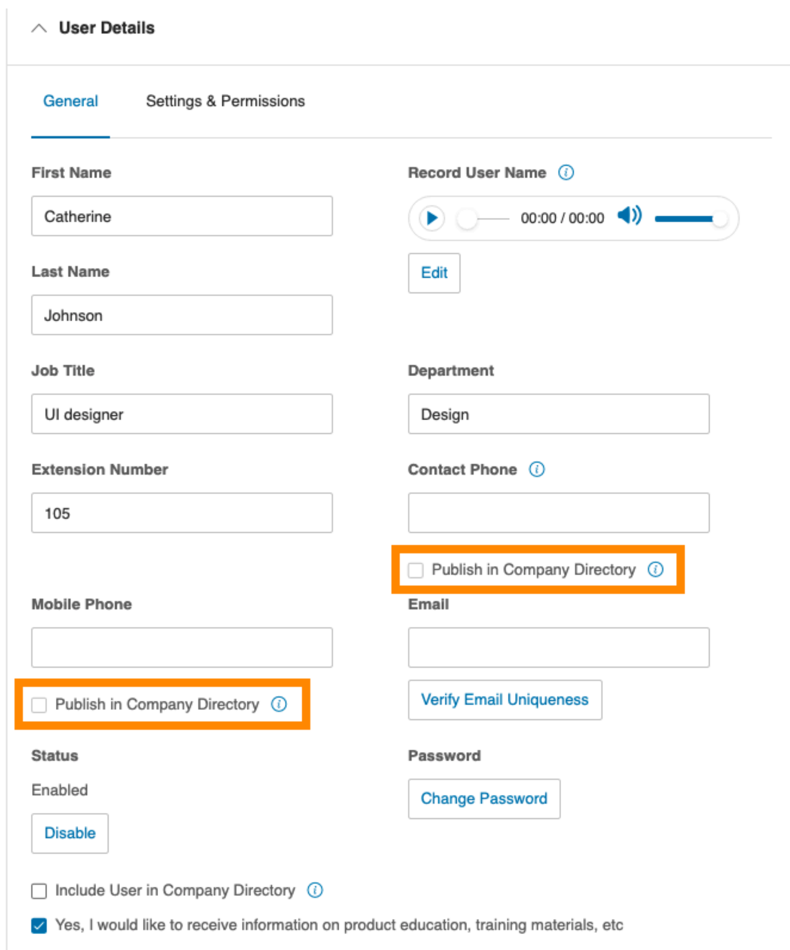
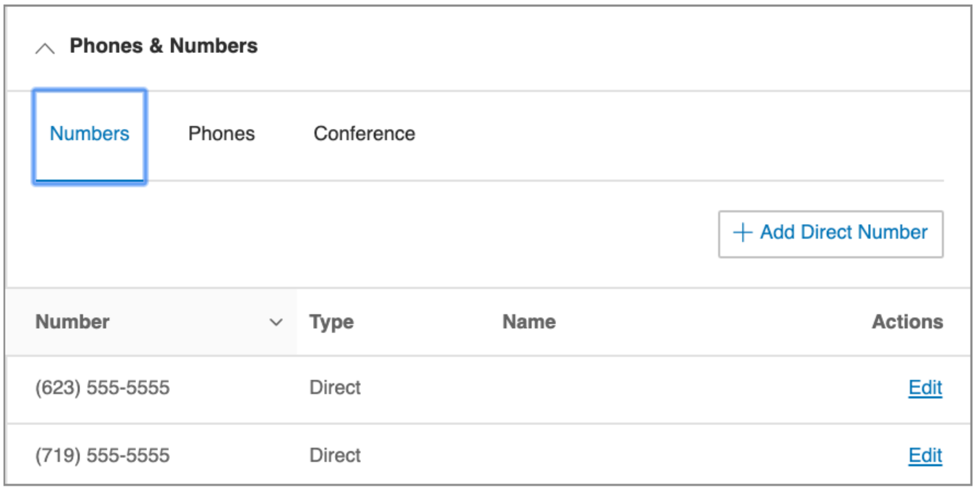


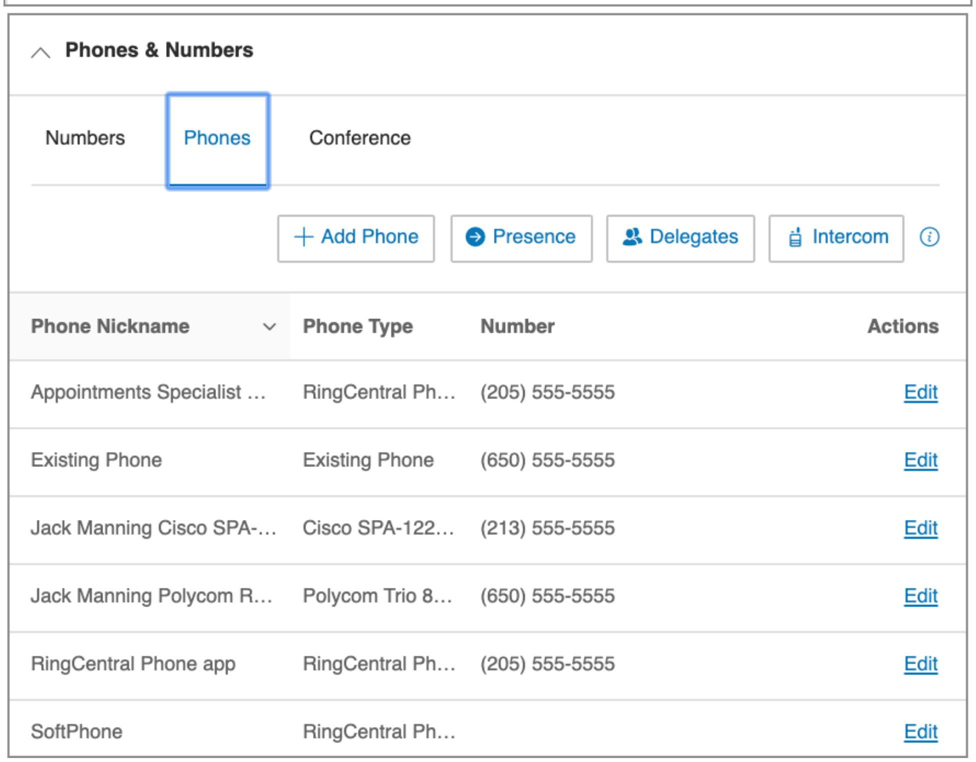
5. Alternatively, you can unpublish contact and mobile phones via **User Details > General**.
6. Untick the checkbox for **Publish in Company Directory** below the number/s you want to hide.



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.





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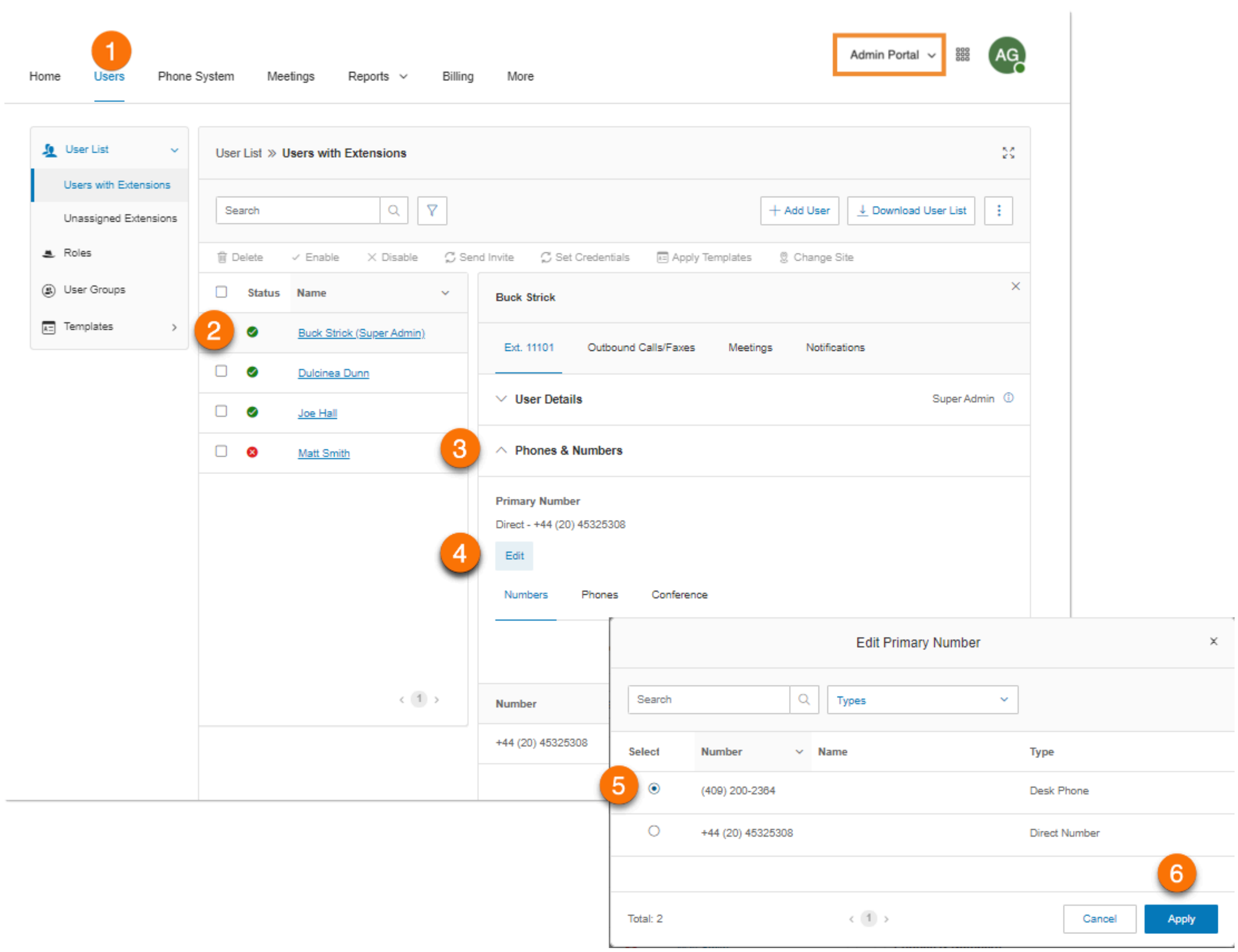
Primary Number

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**.



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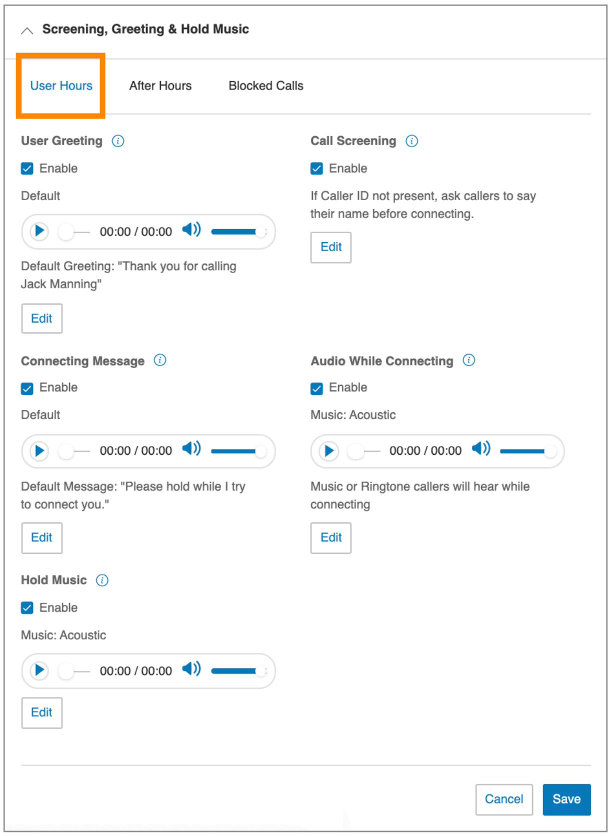
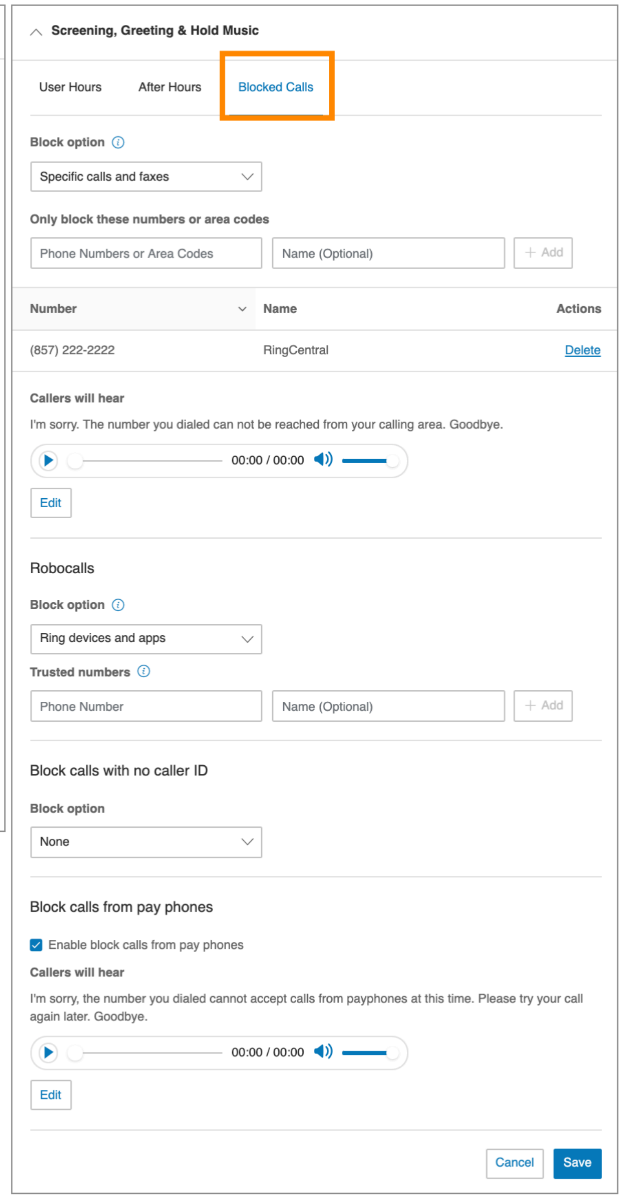
Screening, Greeting & Hold Music

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.





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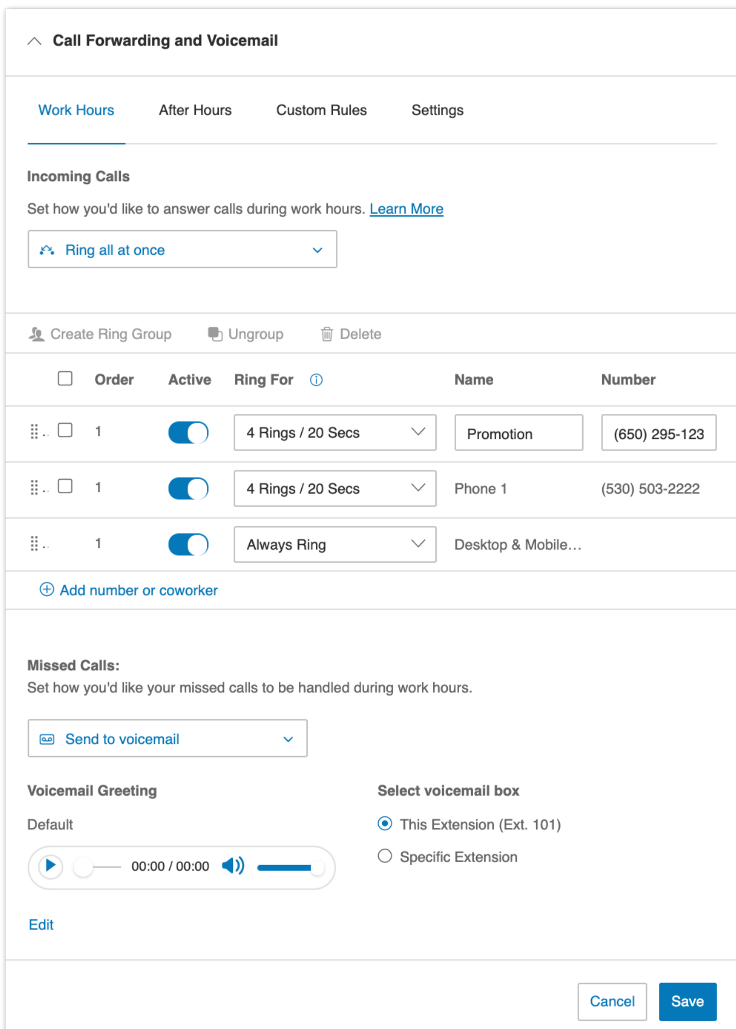
Call Handling and Voicemail

Click **Call Handling 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.



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Learn more about call handling.

Setting a voicemail greeting

Admins can set up the voicemail greeting feature on behalf of another user.

1. Go to the Admin Portal and sign in.
2. Go to **Users > Users with Extensions**.
3. Click on the user's name. (Don't check the box next to the user's name).
4. Select **Call Forwarding and Voicemail**.
5. Under **Work Hours**, scroll down to **Missed Calls** and select *Send to voicemail* from the dropdown.
6. Click **Play to listen** to your current greeting.
7. Click **Edit** if you want to record a custom greeting. Learn how
8. If you want to remove your custom greeting and use the default greeting, click **Edit**, then select *Default*.
9. By default, voicemails are saved in the user's voicemail box. To save their voicemails in a different voicemail box, select **Specific Extension** under **Select voicemail** box and choose from the list of extensions.
10. Click **Save**.

Setting up the Forward all calls feature

The **Forward all calls** feature allows you to easily forward all your incoming calls when you're unable to answer. You can forward incoming calls to a voicemail, coworker, external number, call queue, announcement, IVR menu, or other locations. You can also schedule the time period when the incoming calls should be forwarded.

Admins can set up the **Forward all calls** feature on behalf of another user.

1. Go to the Admin Portal and sign in.
2. Go to **Users > User List > Users with Extensions**, then select the relevant user extension.
3. Click **Call Handling**.
4. Turn on the toggle for **Forward all calls**.

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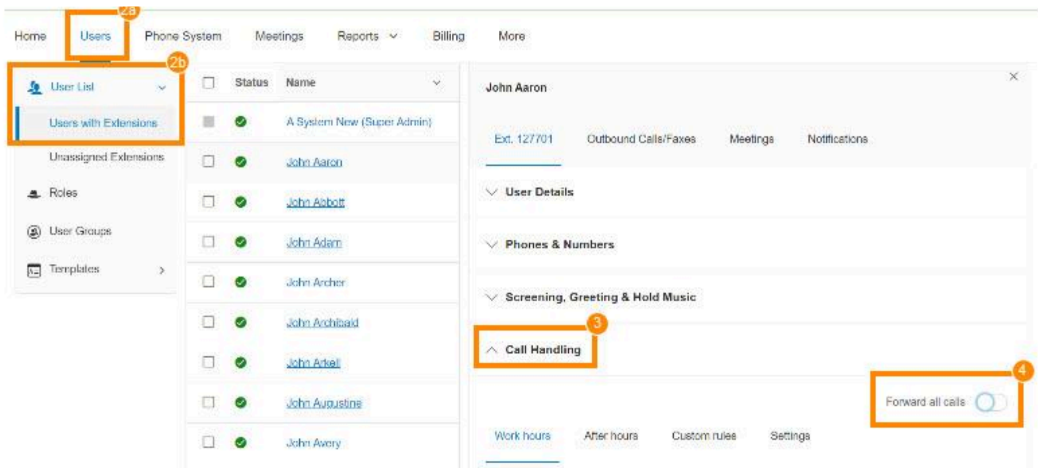
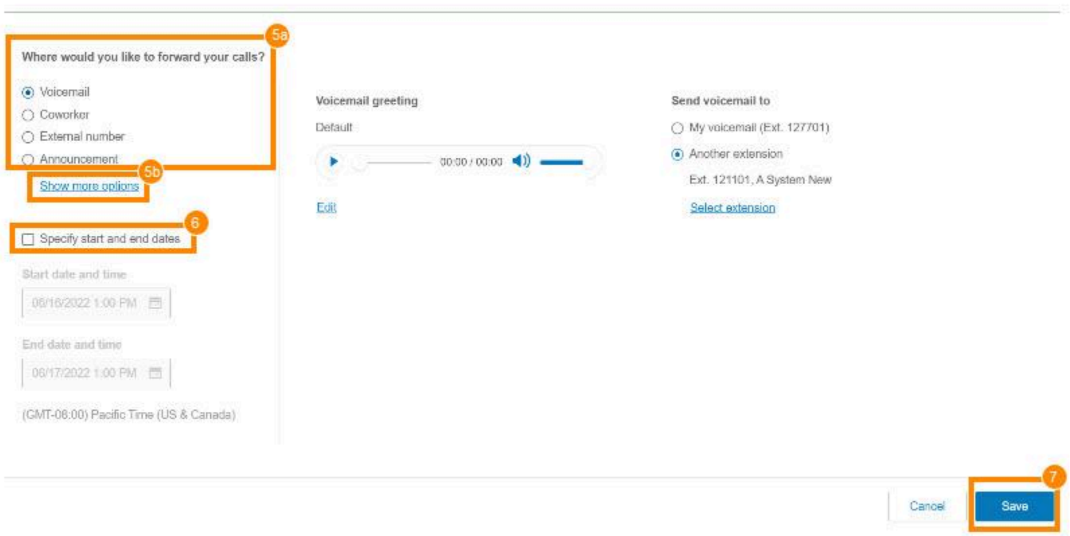


5. Select one of the options under [Where would you like to forward your calls?](). Click **Show more options** to see the complete list.
6. Check the box for **Specify start and end dates** to set a start and/or end date or time (optional). This feature is useful for forwarding calls around a break or vacation schedule.
7. Click **Save**.



Admins will see a banner at the top of the **Call Handling** section for the selected user when the **Forward all calls** feature is turned on.

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Where to forward your calls

- **Voicemail:** Forward calls to your voicemail box. You can play and customize your voicemail greeting.
- **Coworker:** Forward calls to a coworker. Type the coworker's name or extension number in the search box, then click on the desired coworker.
- **External number:** Forward calls to an external number, such as an answering service.
- **Announcement:** Play an announcement. You can play and customize the greeting.
- **Call queue:** Forward calls to a call queue. Type the call queue name or extension number in the search box, then click on the desired call queue.
- **Delegated line:** Forward calls to a delegated line. Type the delegated line name or extension number in the search box, then click on the desired delegated line.
- **Shared line:** Forward calls to a shared line. Type the shared line name or extension number in the search box, then click on the desired shared line.
- **Limited extension:** Forward calls to a limited extension. Type the limited extension name or extension number in the search box, then click on the desired limited extension.
- **IVR menu:** Forward calls to an IVR menu. Type the IVR menu name or extension number in the search box, then click on the IVR menu line.

Note:

- To use the **Forward all calls** features, the **User Settings - Call handling** permission is required. If the user doesn't have this required permission, the Forward all calls feature won't be available to them. For more information, go to List of User Permissions.

When **Forward all calls** and Do Not Disturb (DND) are both turned on, calls will be forwarded according to your **Forward all calls** settings.

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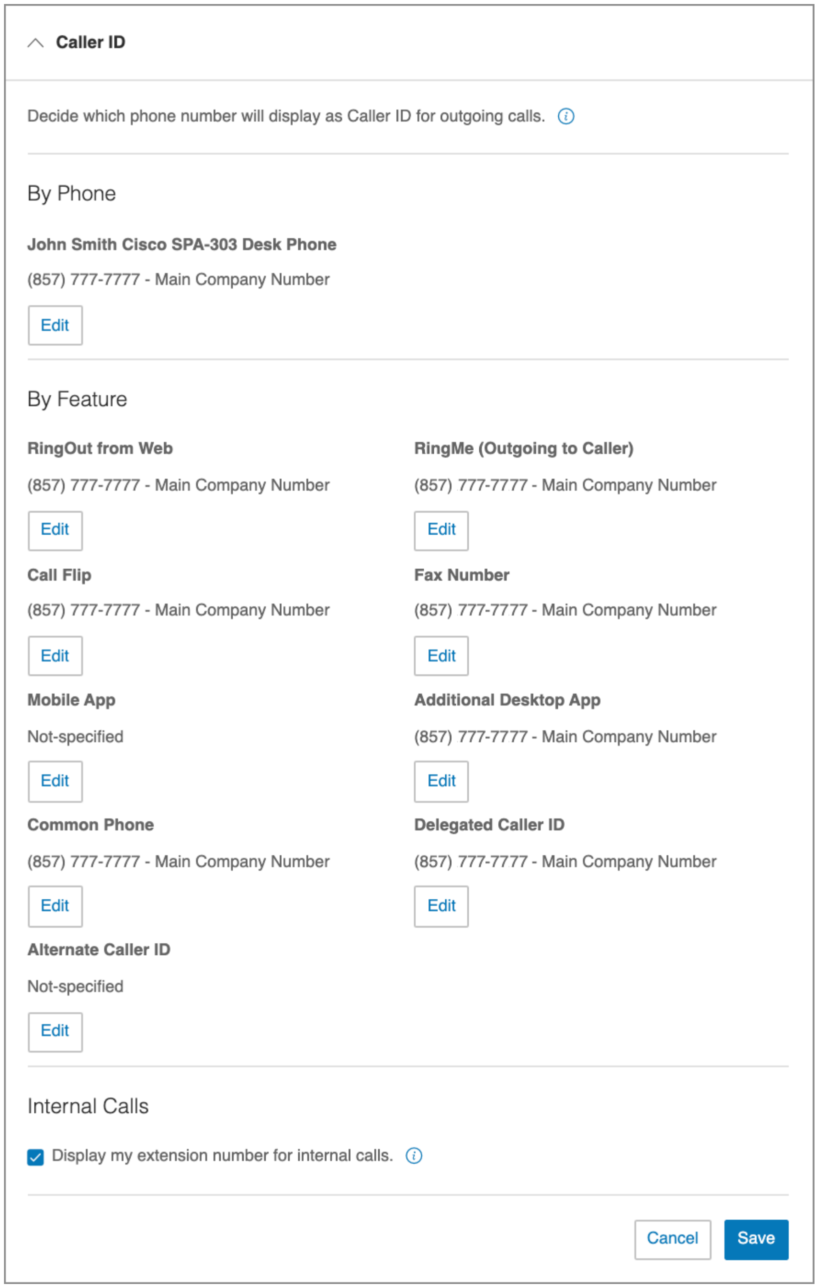
Outbound Calls/Faxes

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.



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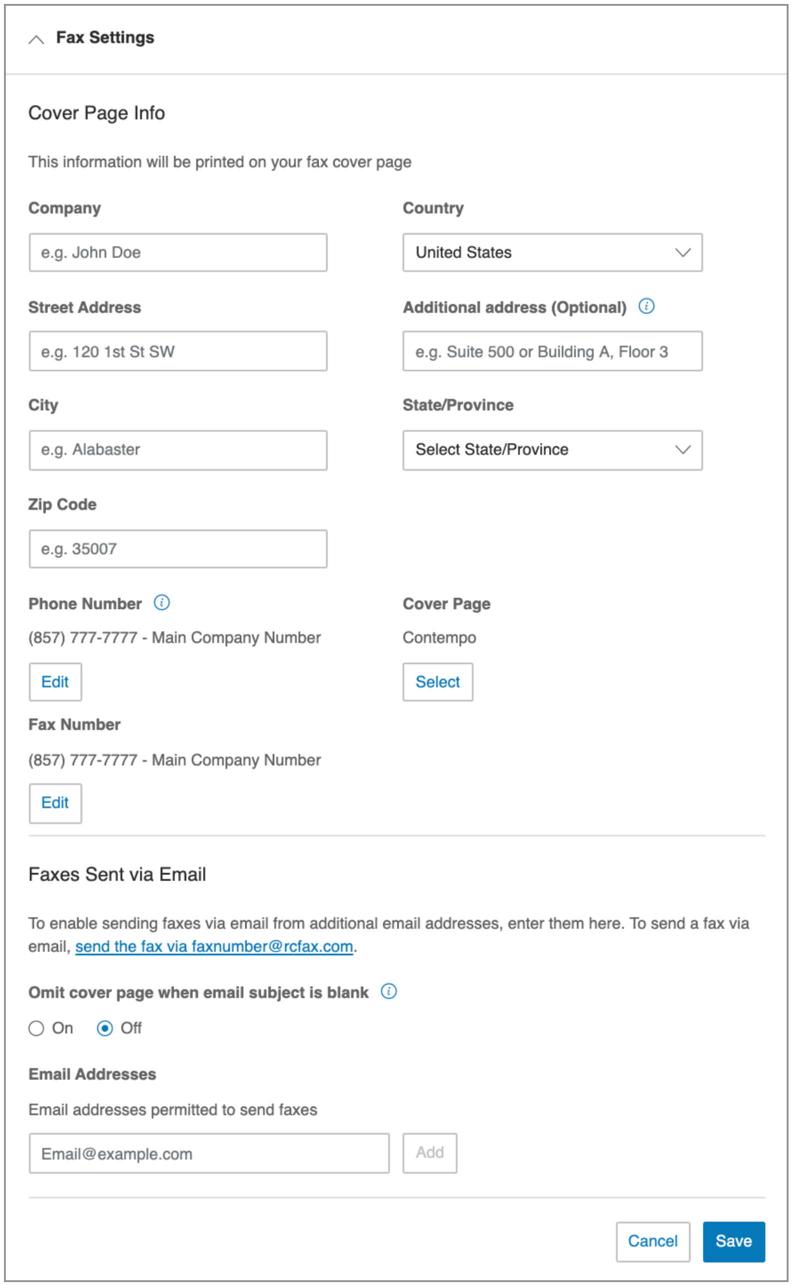
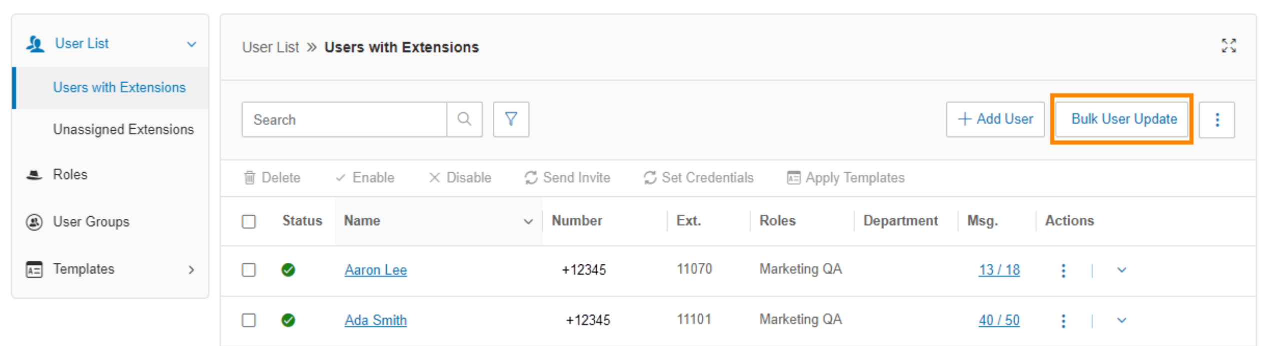
Outbound Fax settings

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



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.

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- *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).

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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 RingEX 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**.

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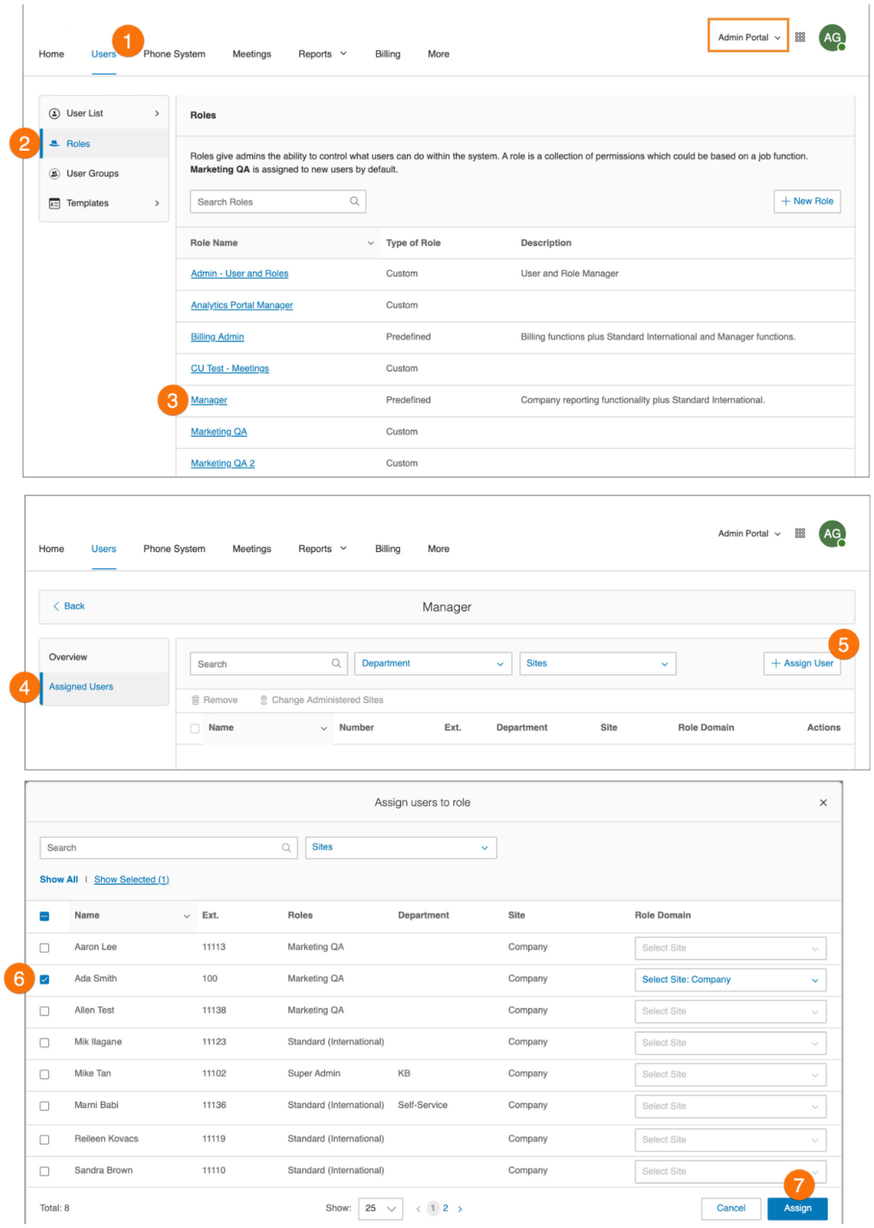
The users' roles are assigned and displayed in the Users list assignments are displayed in the **Users** list.

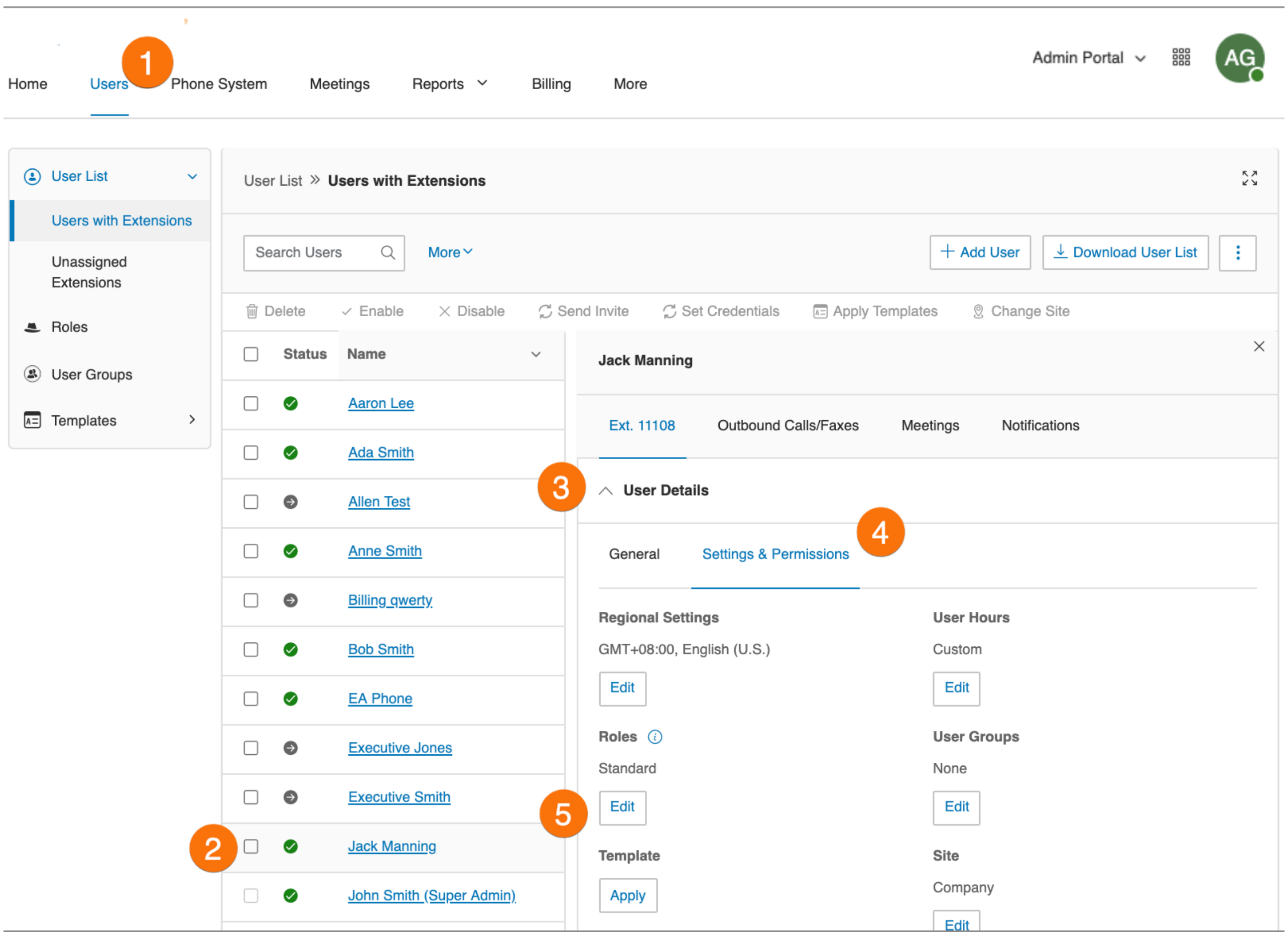
Note: The **New Role** option is available for RingEX Premium and Ultimate users only.



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**.



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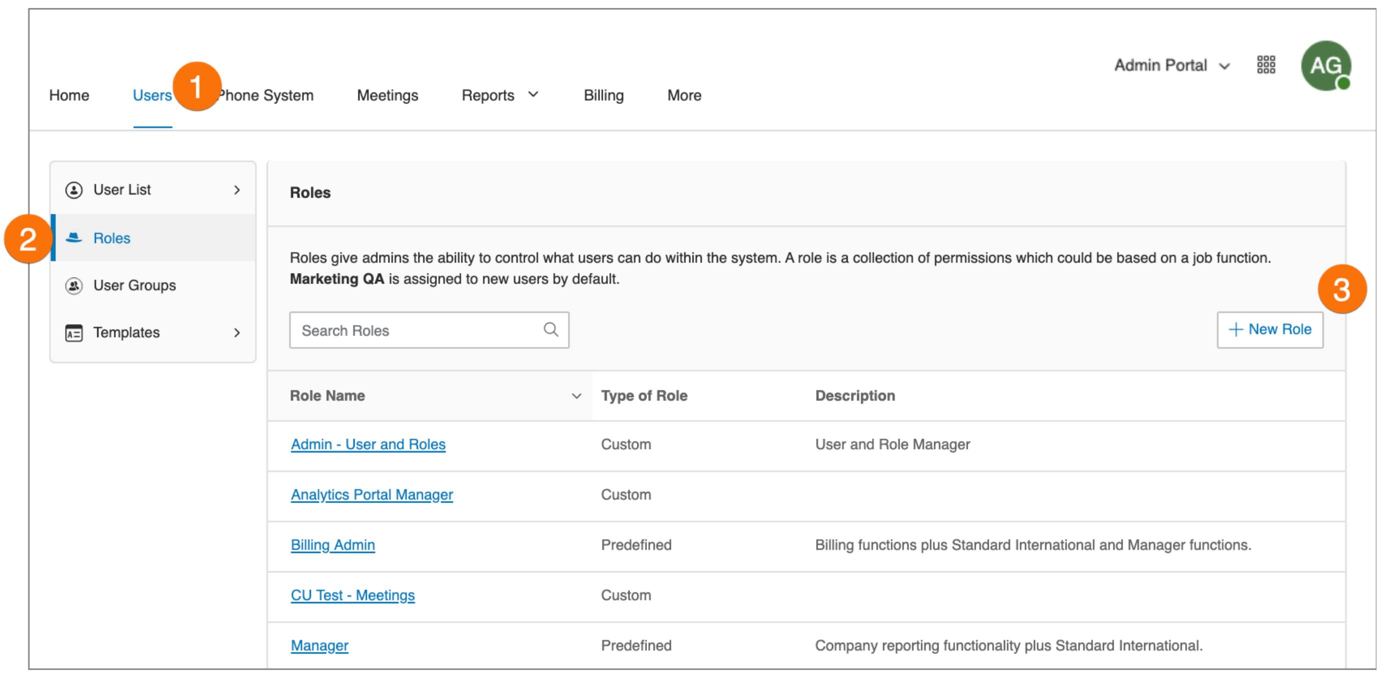
Creating a new role

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 RingEX Premium and Ultimate only.



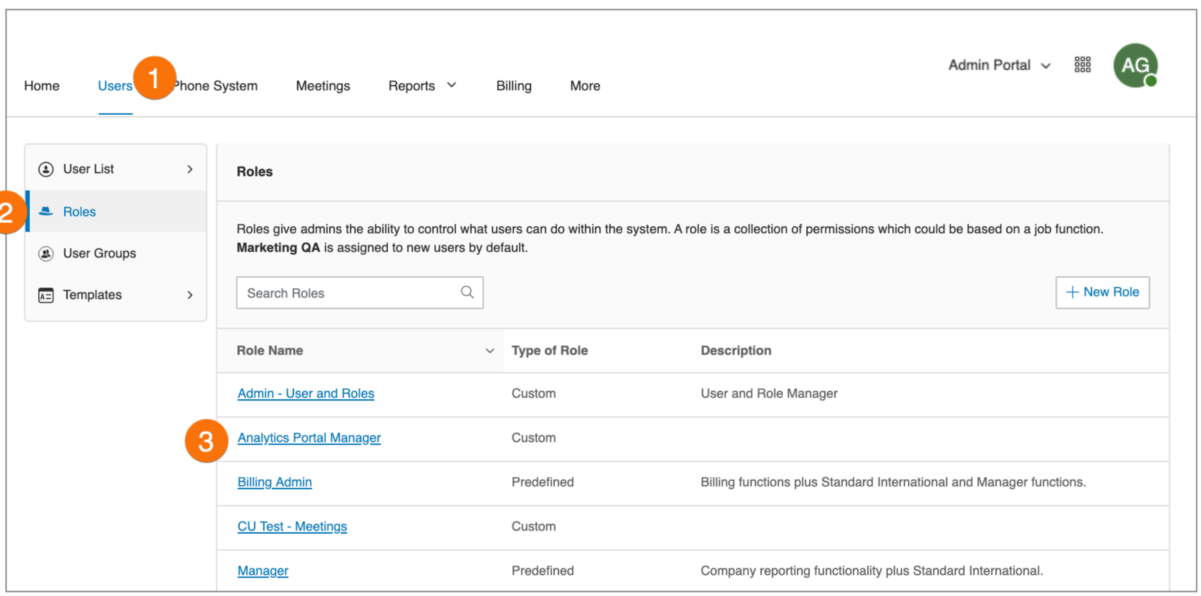
Setting a default role

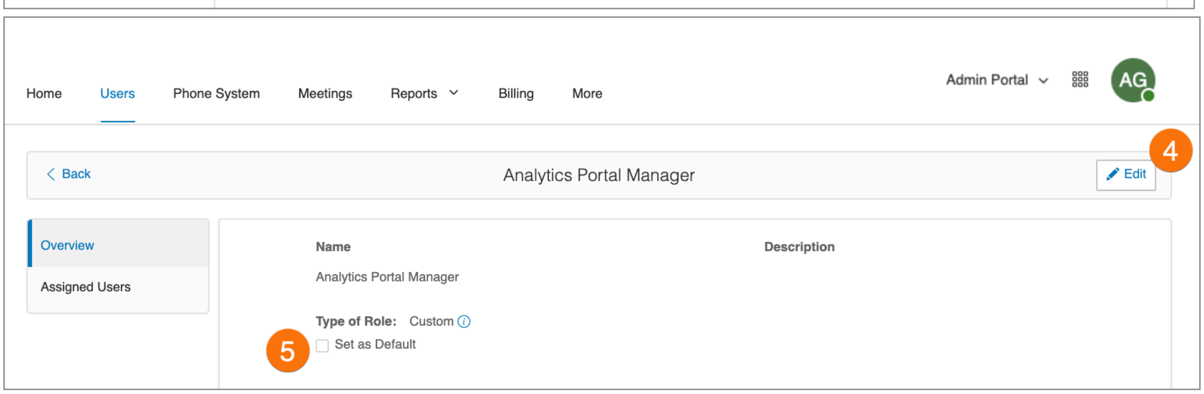
For ease of use, you can create a custom role and then set that role as the default role assigned to all newly-created users.

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.





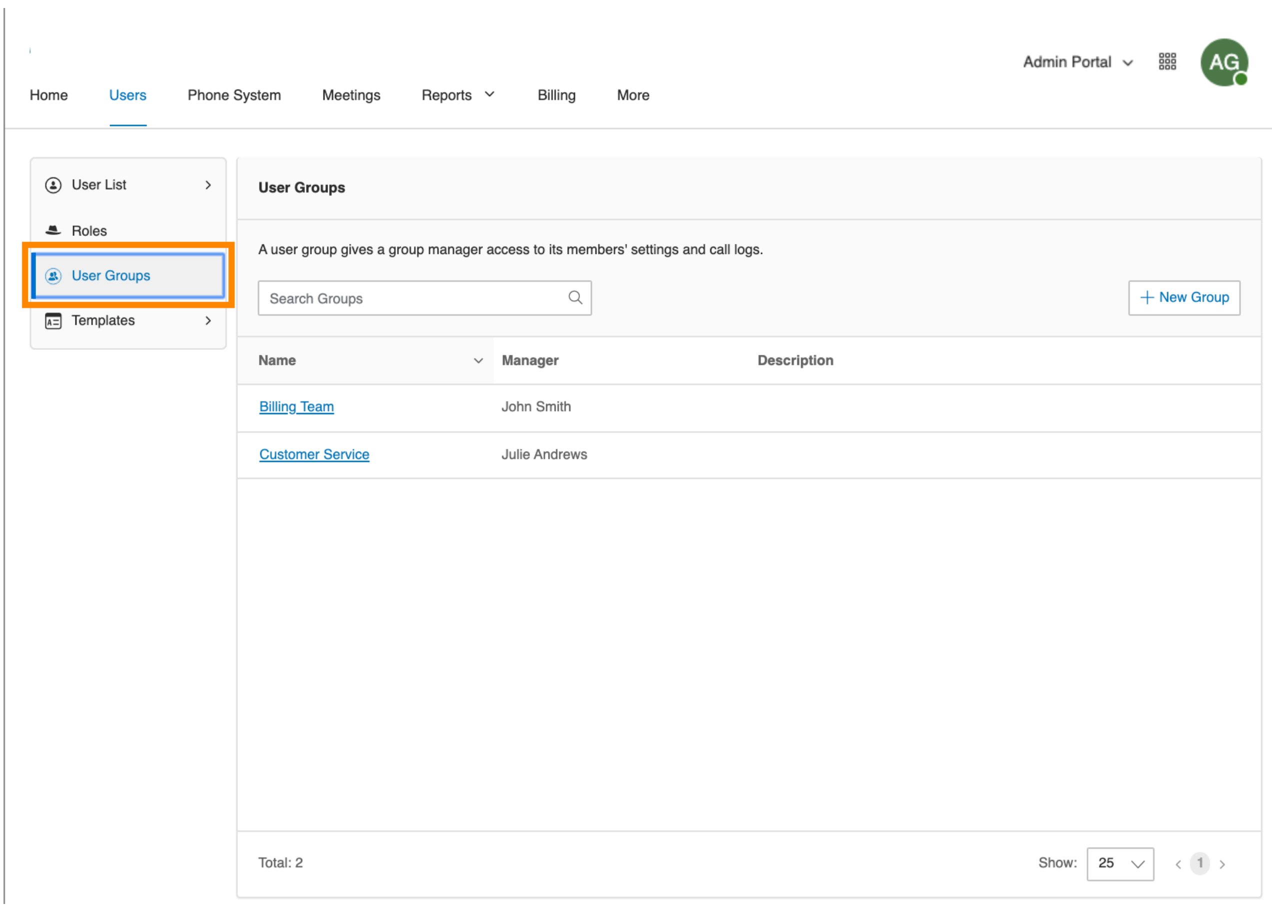
Managing user groups

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 RingEX Premium and Ultimate only.



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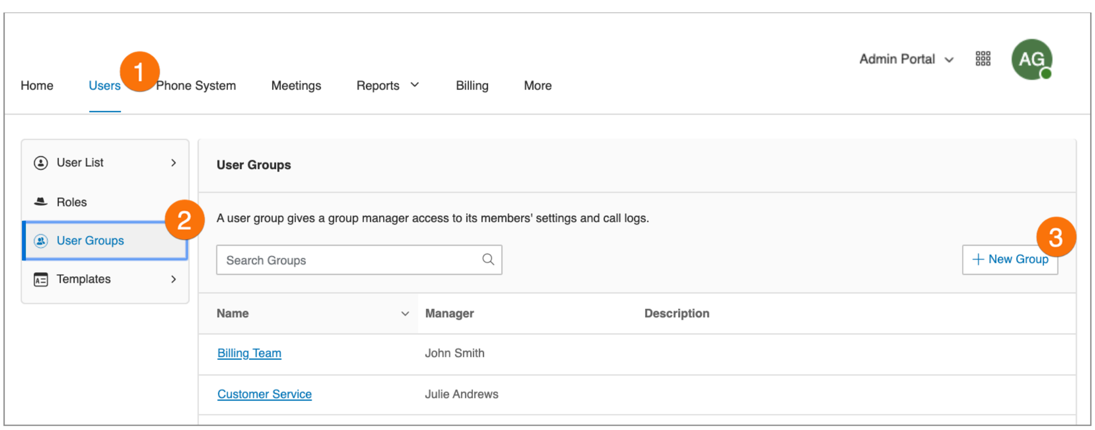
The tasks involved in managing user groups include:

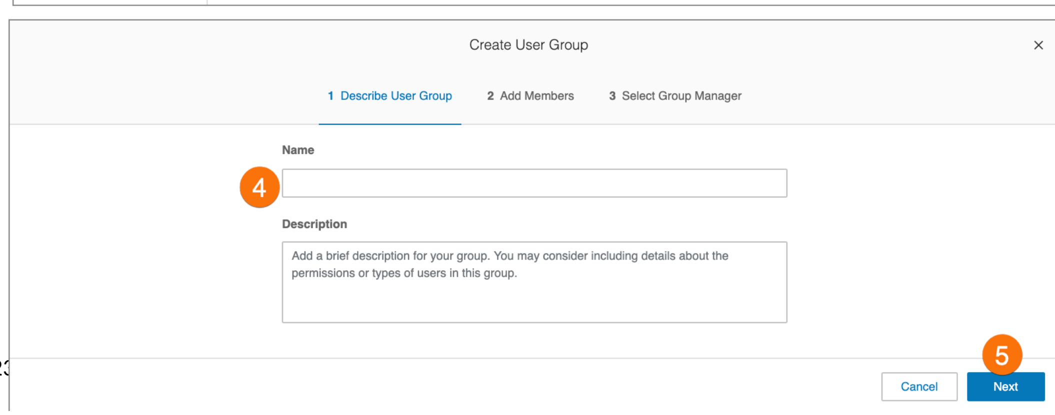
- **Assigning Users to User Groups**: The **Templates** section in user management allows the account administrator to streamline the assignment of users to user groups. This assignment is performed in the User Groups option in Templates.
- **Viewing and modifying User Settings**: The **User Settings** 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.

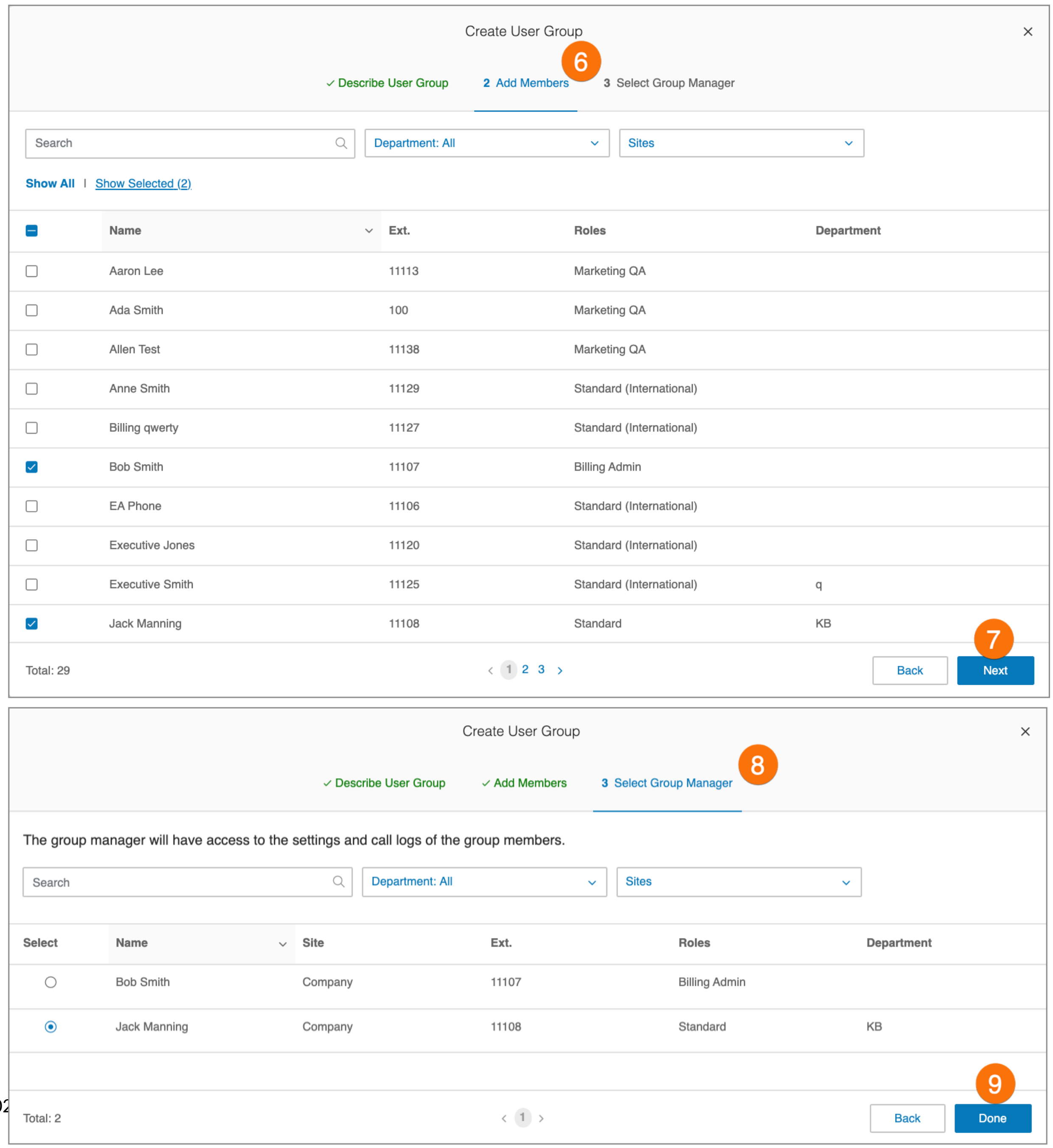
1. Click the **Users** tab from the **Admin Portal**.
2. Click **User Groups**. You will see a list of existing user groups if any.
3. Click **Create** (if no user groups exist), or click **New Group**.
4. Enter a **Name** and **Description** for the user group.
5. Click **Next**.





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.



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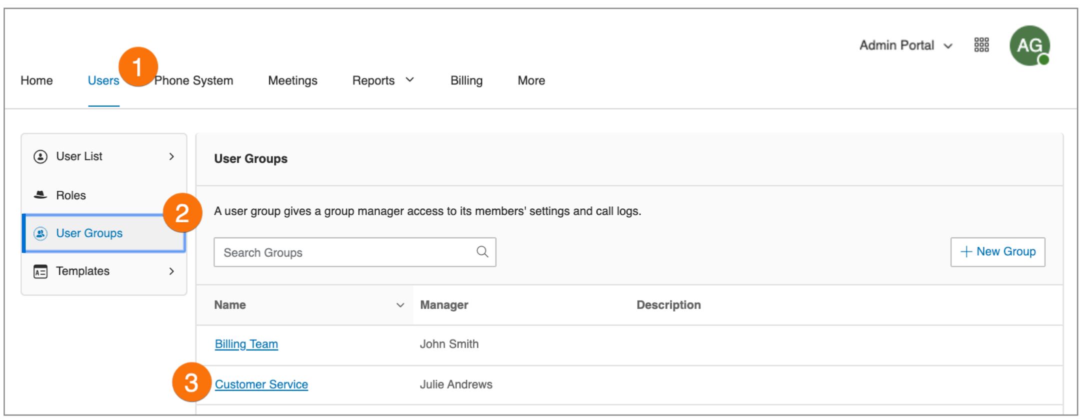
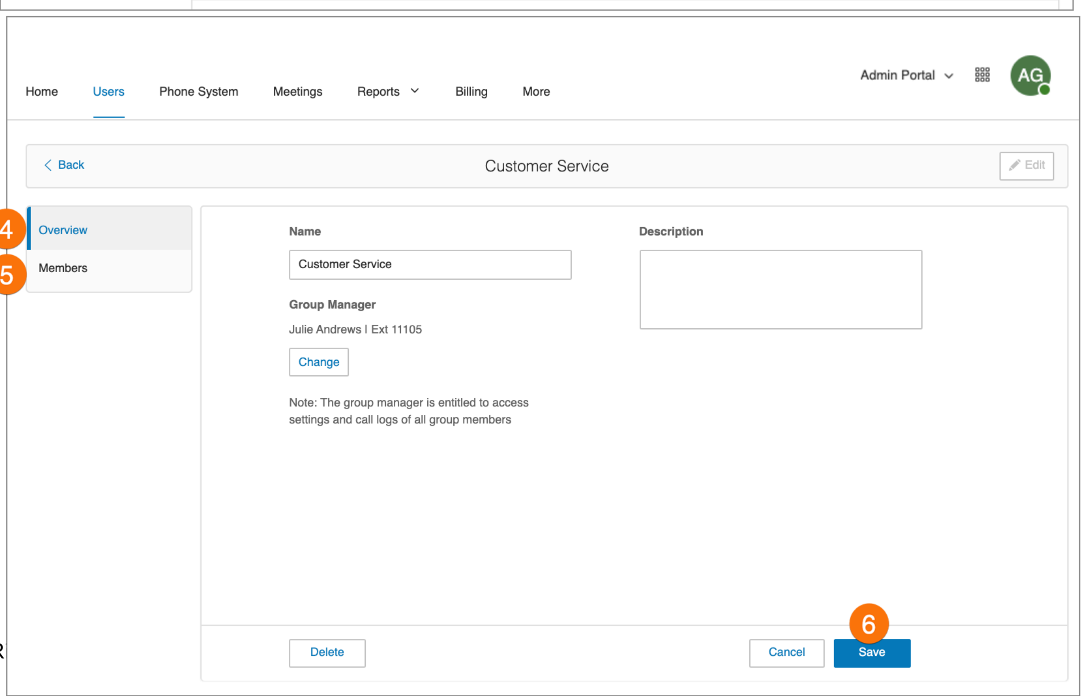
Editing or deleting a user group

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.





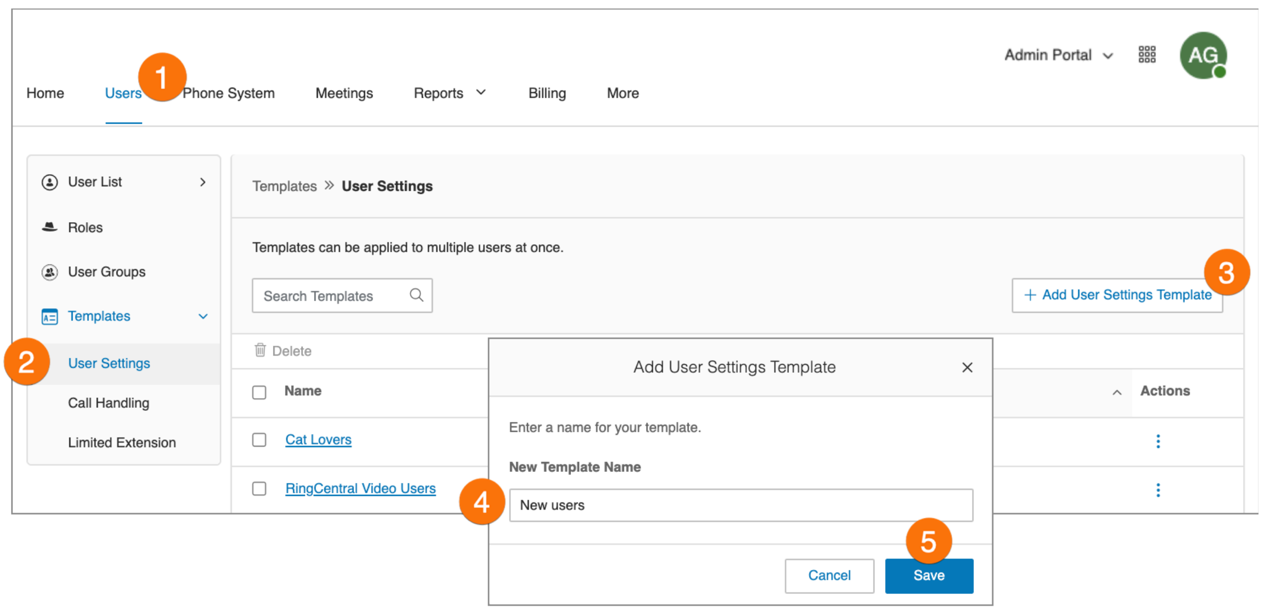
Managing templates

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**.



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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.

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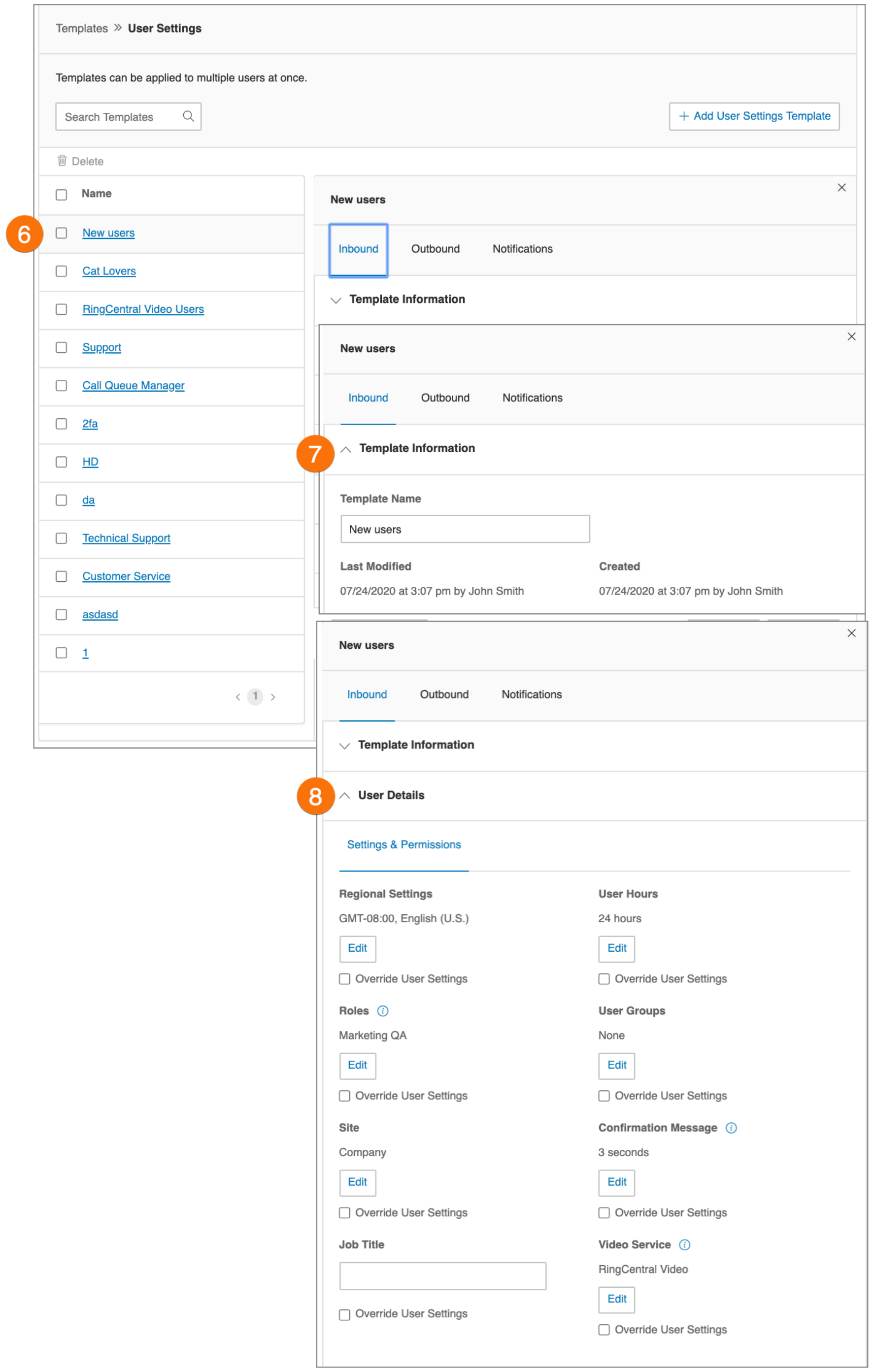

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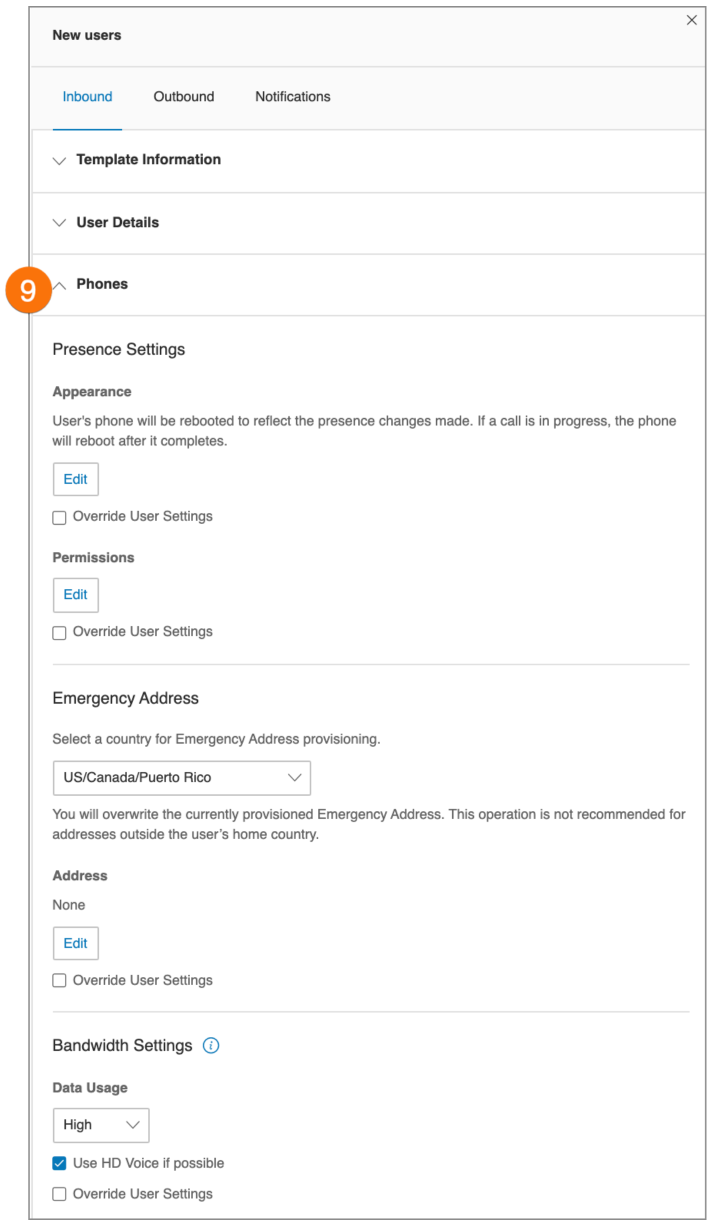
9. Configure **Phones** settings.

    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.



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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.

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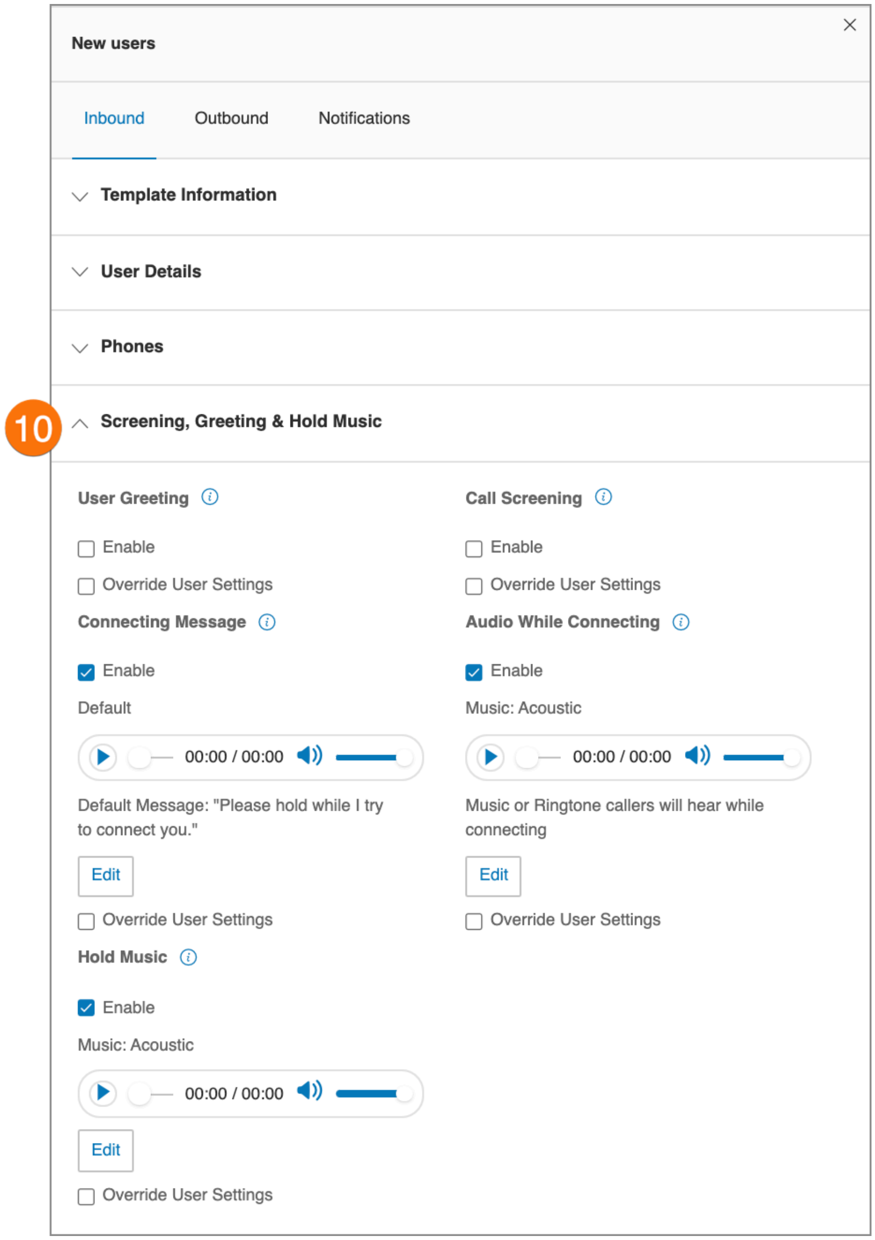

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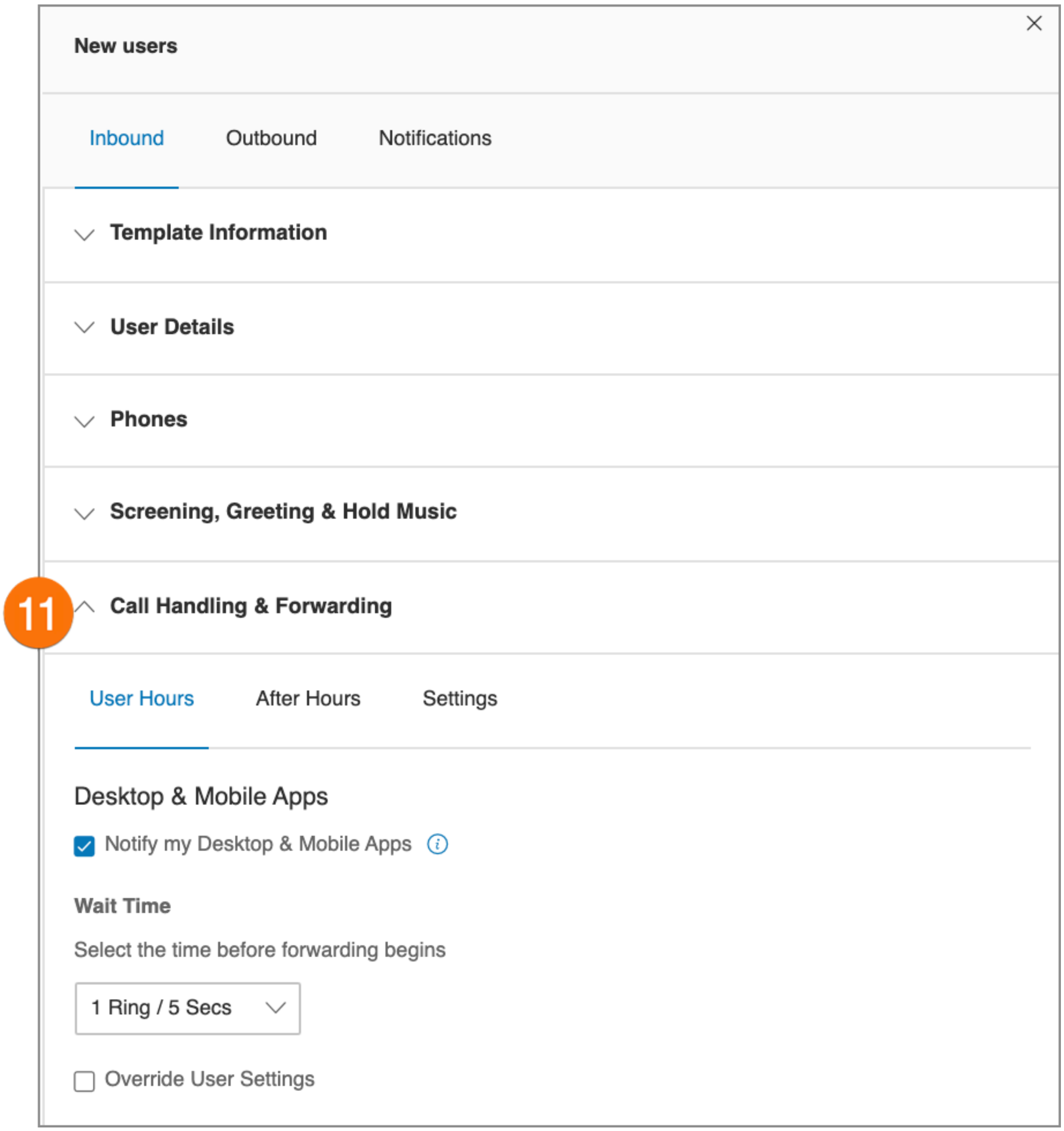
11. Configure **Call Forwarding and Voicemail** settings. Under **Desktop & Mobile Apps**, specify whether to notify your Desktop and apps before forwarding the incoming call to your desk phones and forwarding numbers, and specify a wait time.



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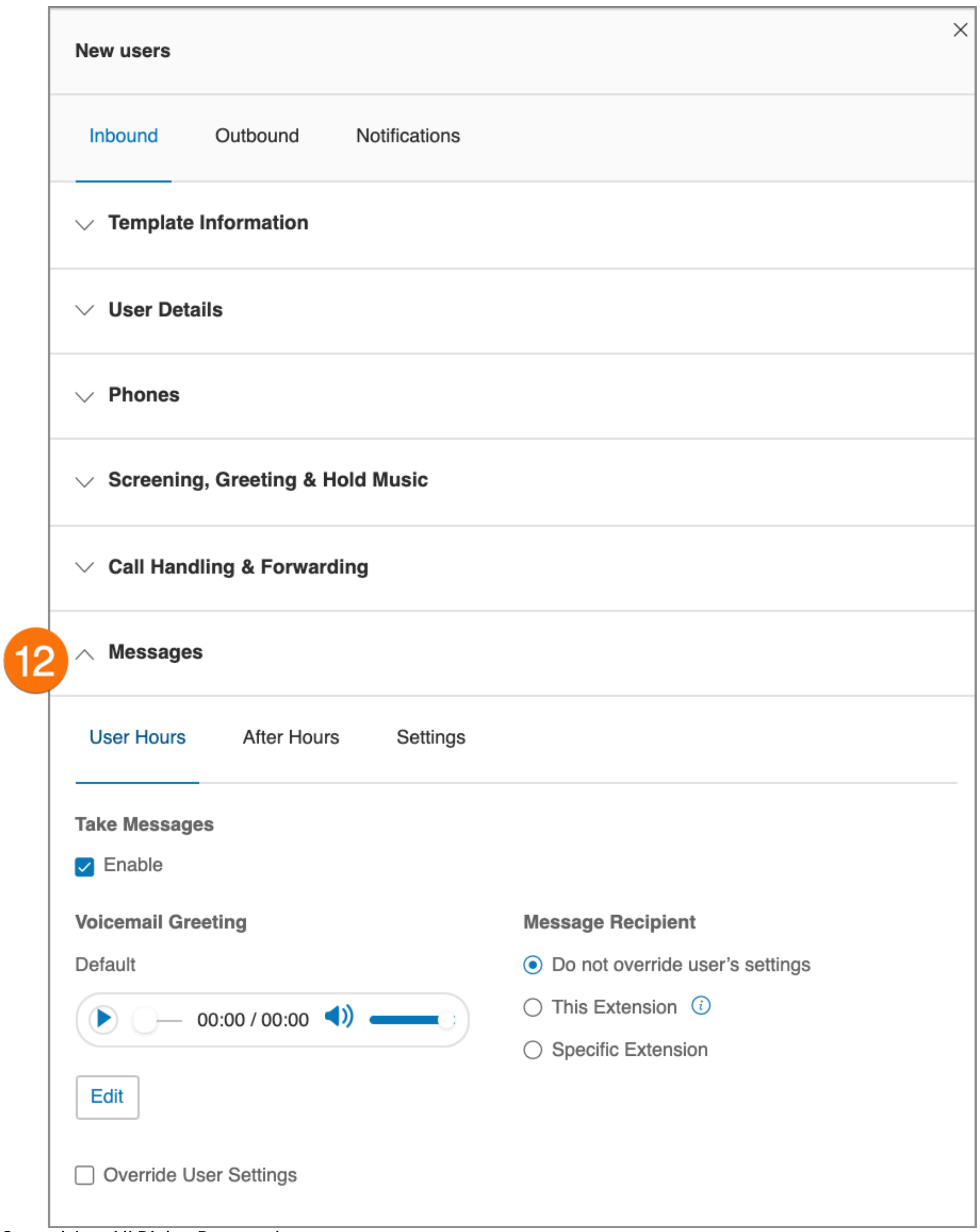
12. Configure **Messages** settings.

    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.



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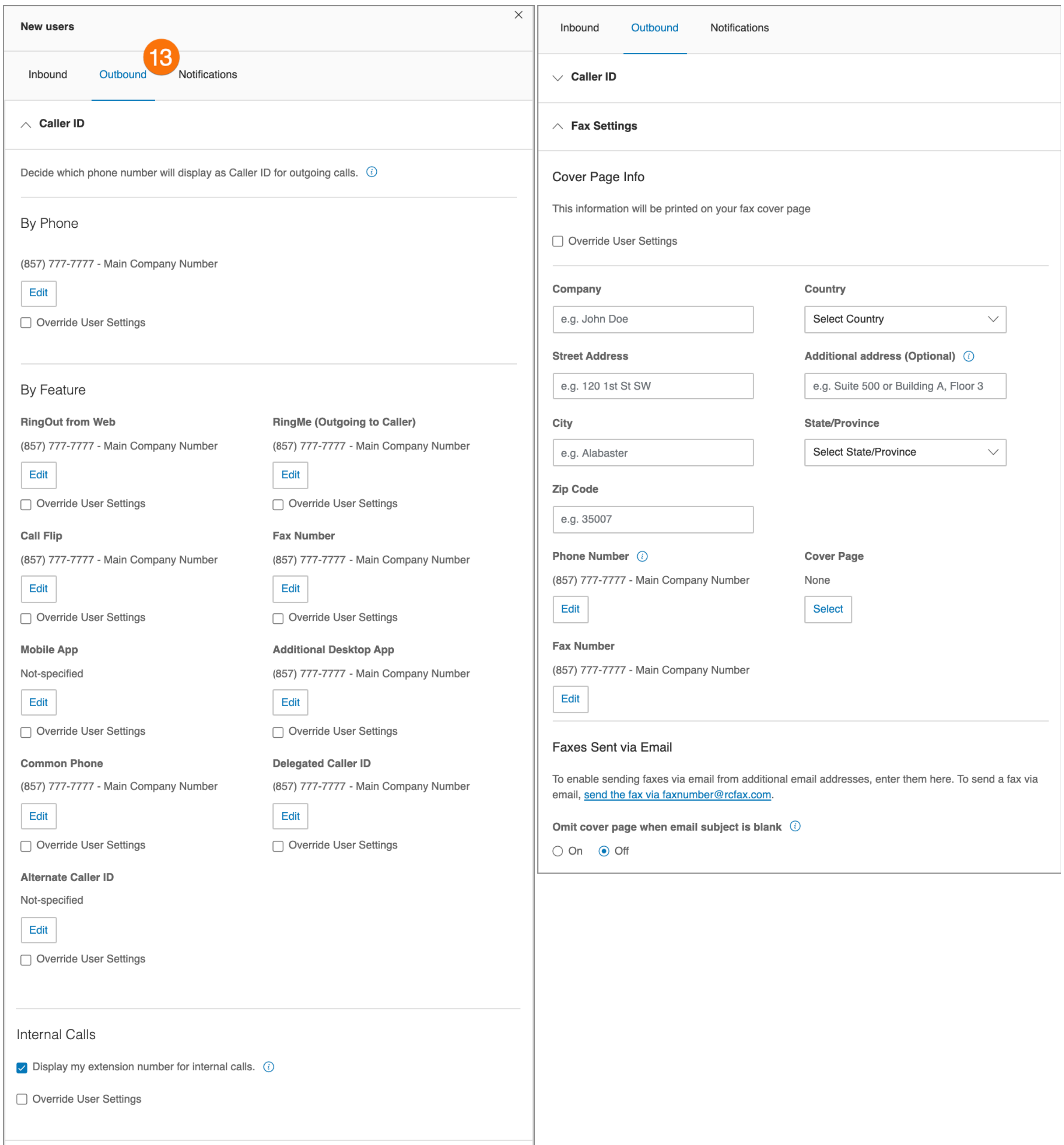
13. Click the **Outbound** tab to configure settings for outbound calls such as caller ID and fax settings.

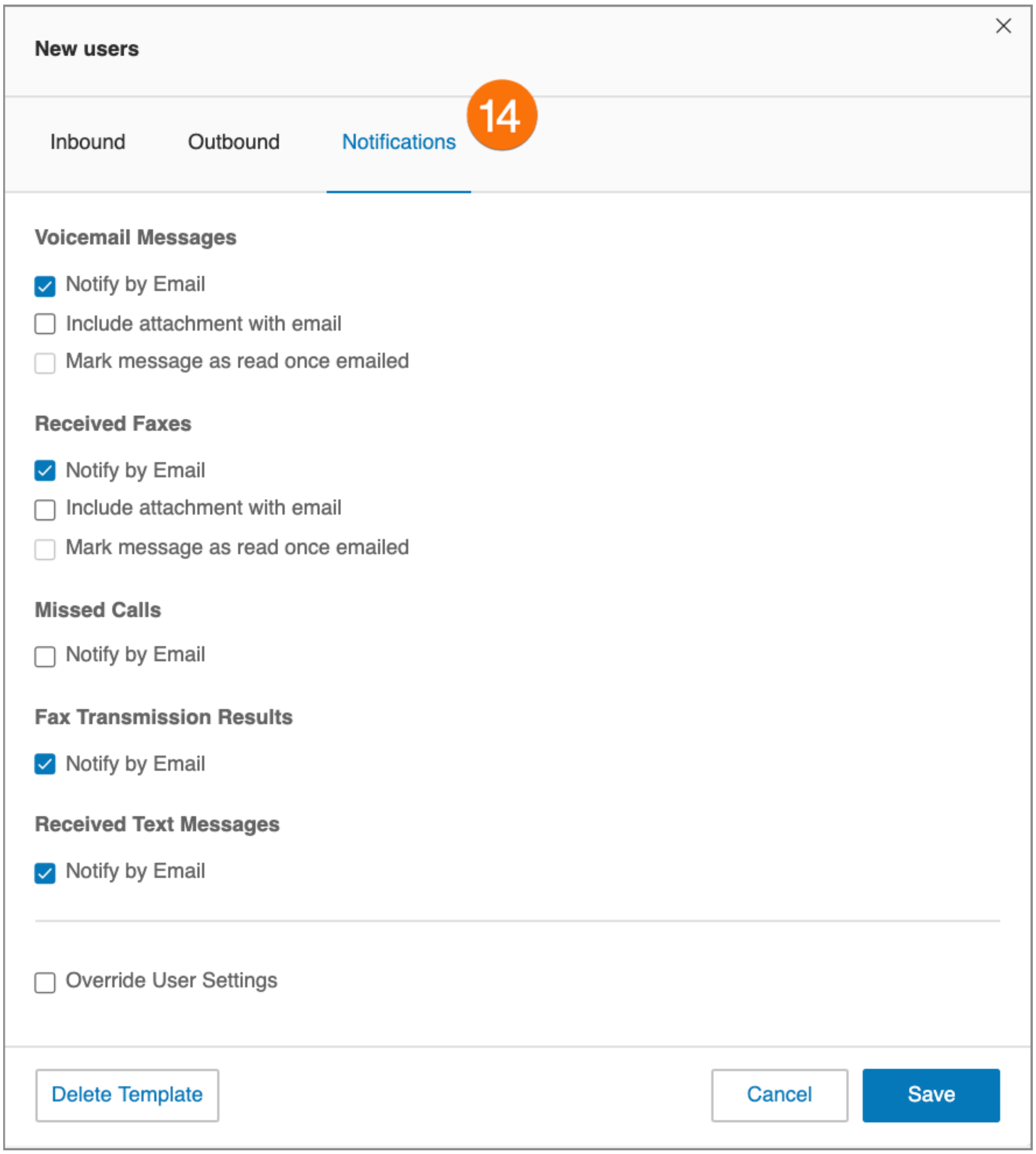
    a. **Caller ID**: Specify caller ID settings by phone or by feature. If you select Toll-Free number or Blocked as your Default Caller ID for any of your endpoints/calling features, you can also select an alternate local number to use in case we detect that your call will not go through.
    b. **Fax Settings**: Specify fax settings including fax cover page information and settings for faxes sent through email.



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**.



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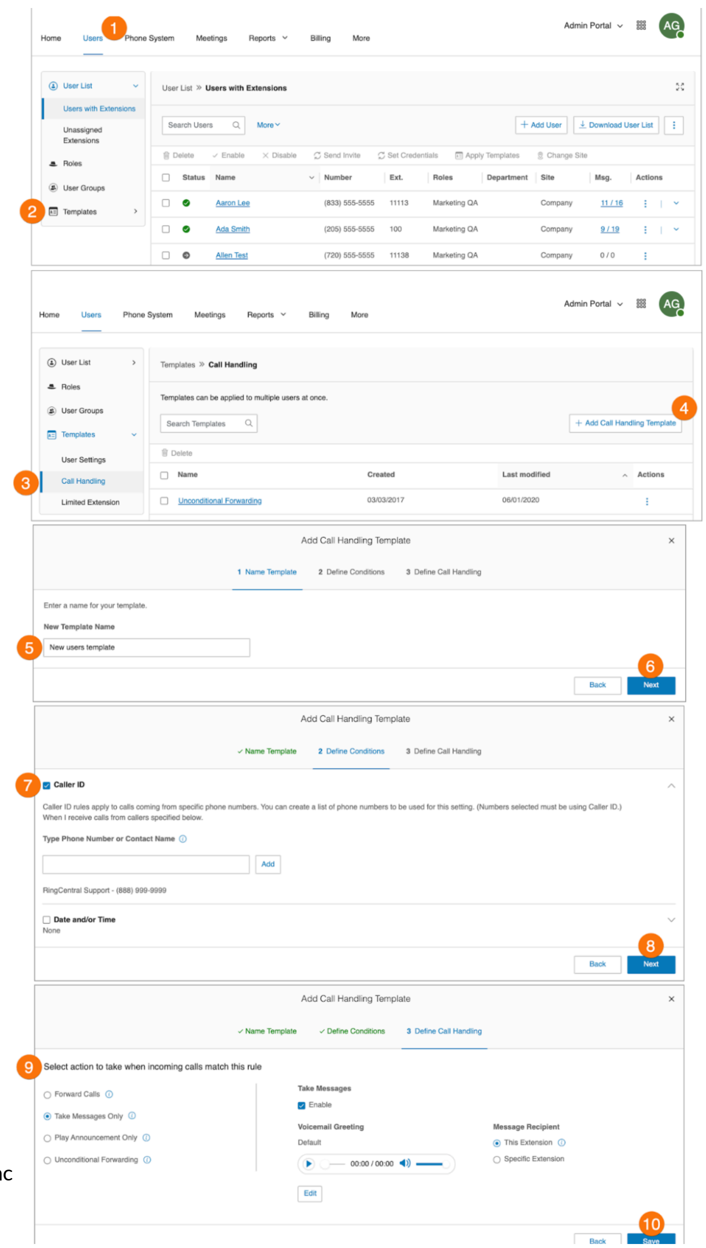
Creating a template for Call Handling settings

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**.



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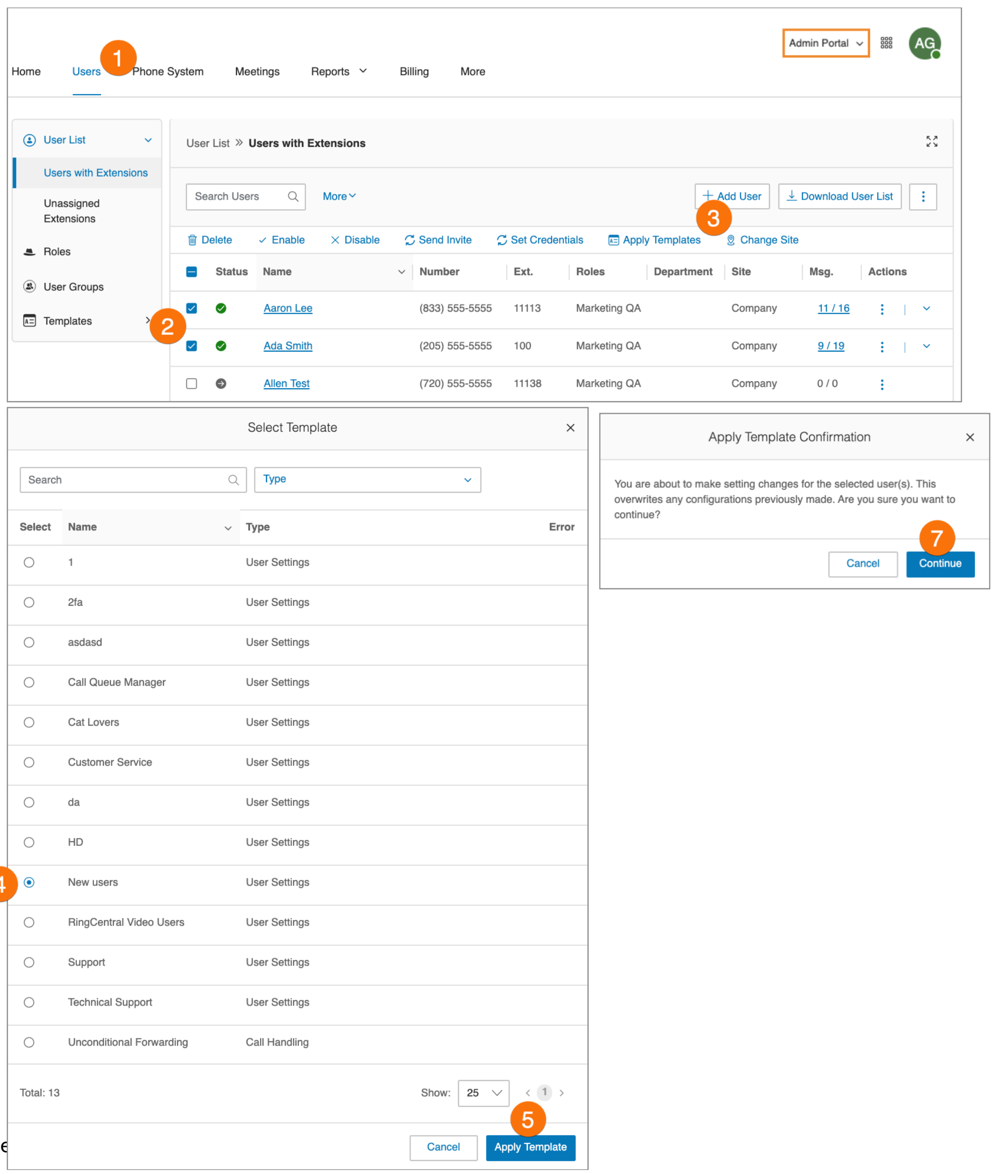
Applying a template to users

There are several ways to apply a template to users.

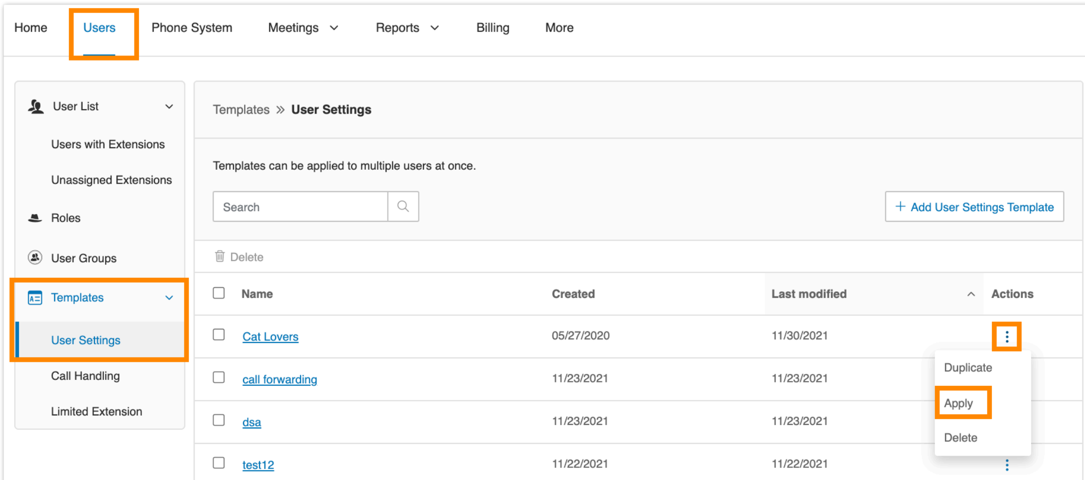
Applying a template via Users List

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**.



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**.

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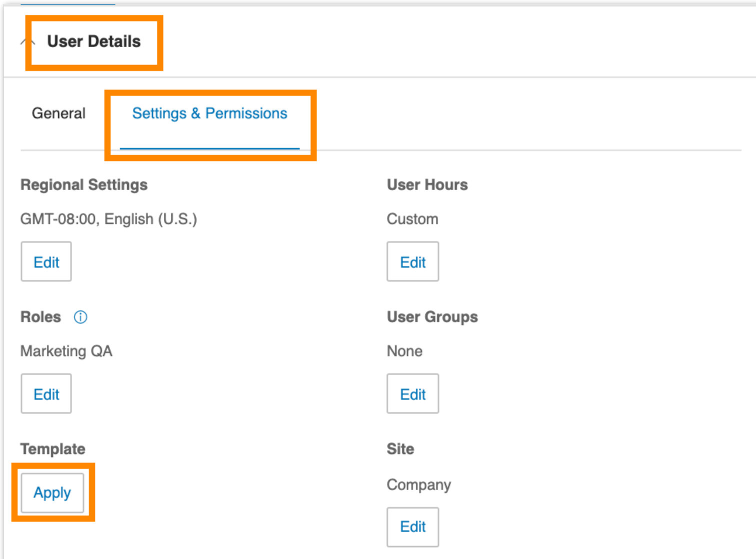
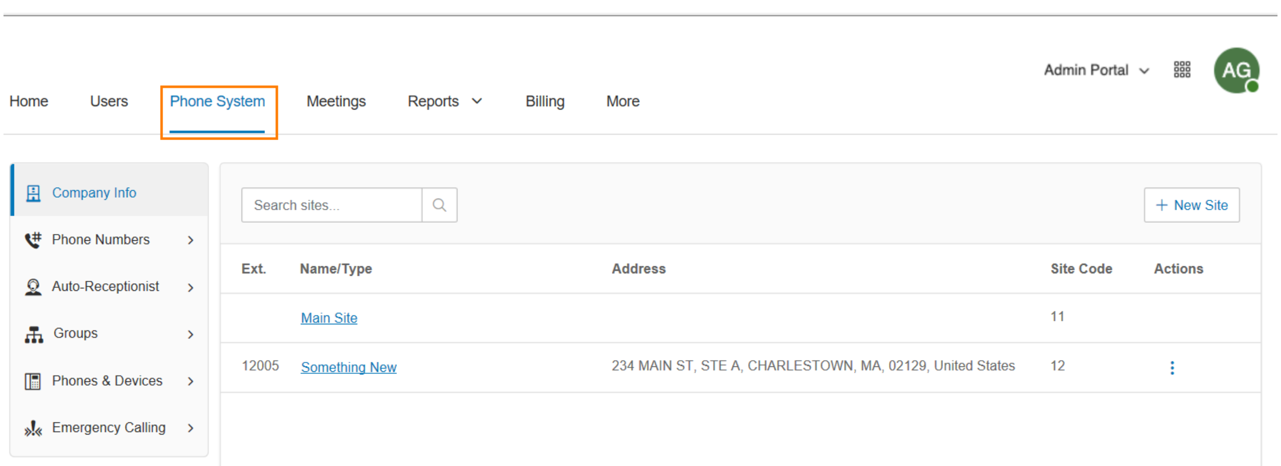


5. Select a Template from the popup window.
6. Click **Apply Template**.

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

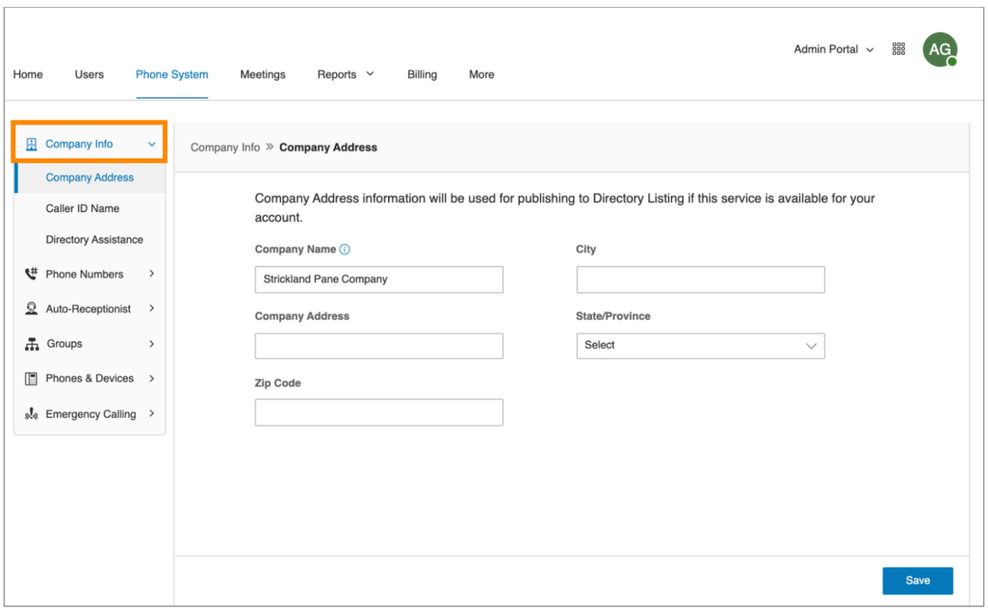


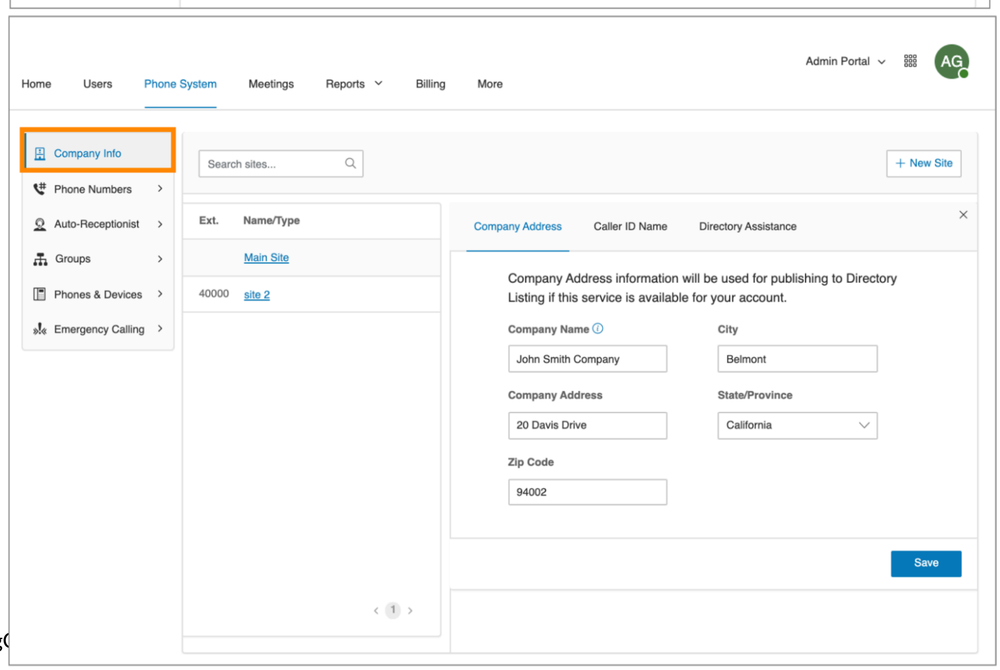
Company Info

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.





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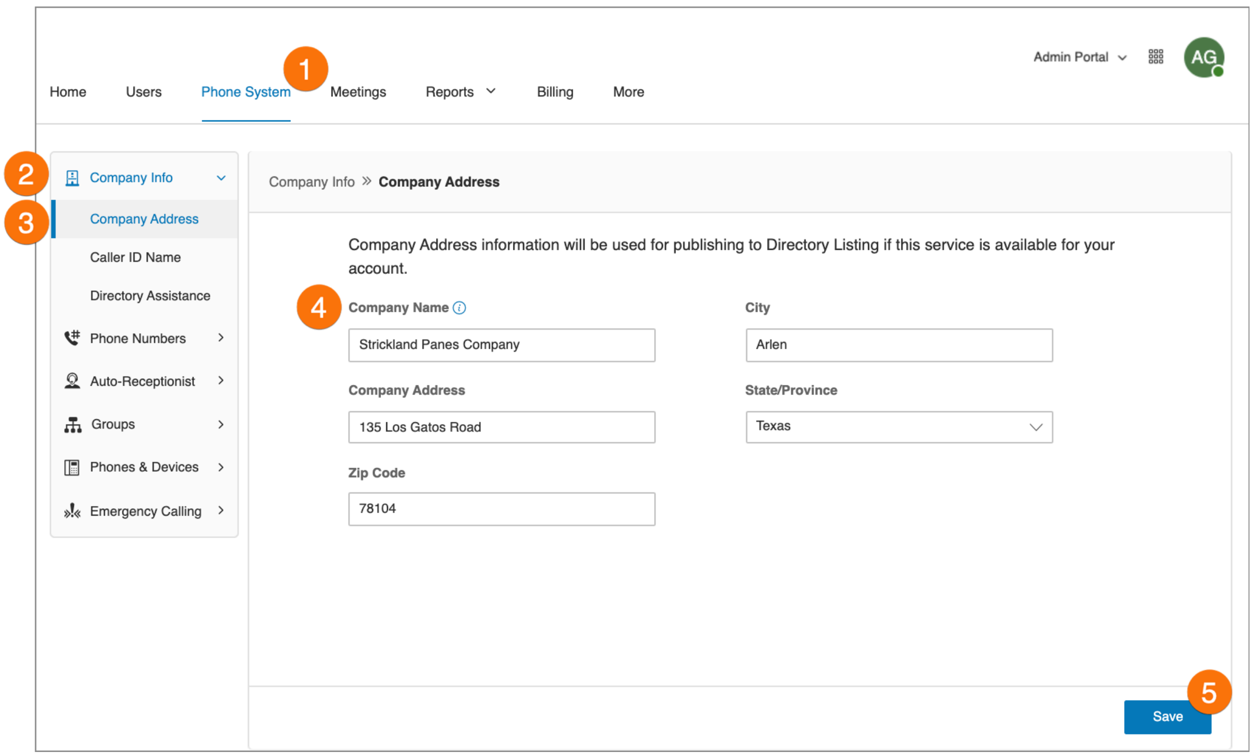
Company address

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**.



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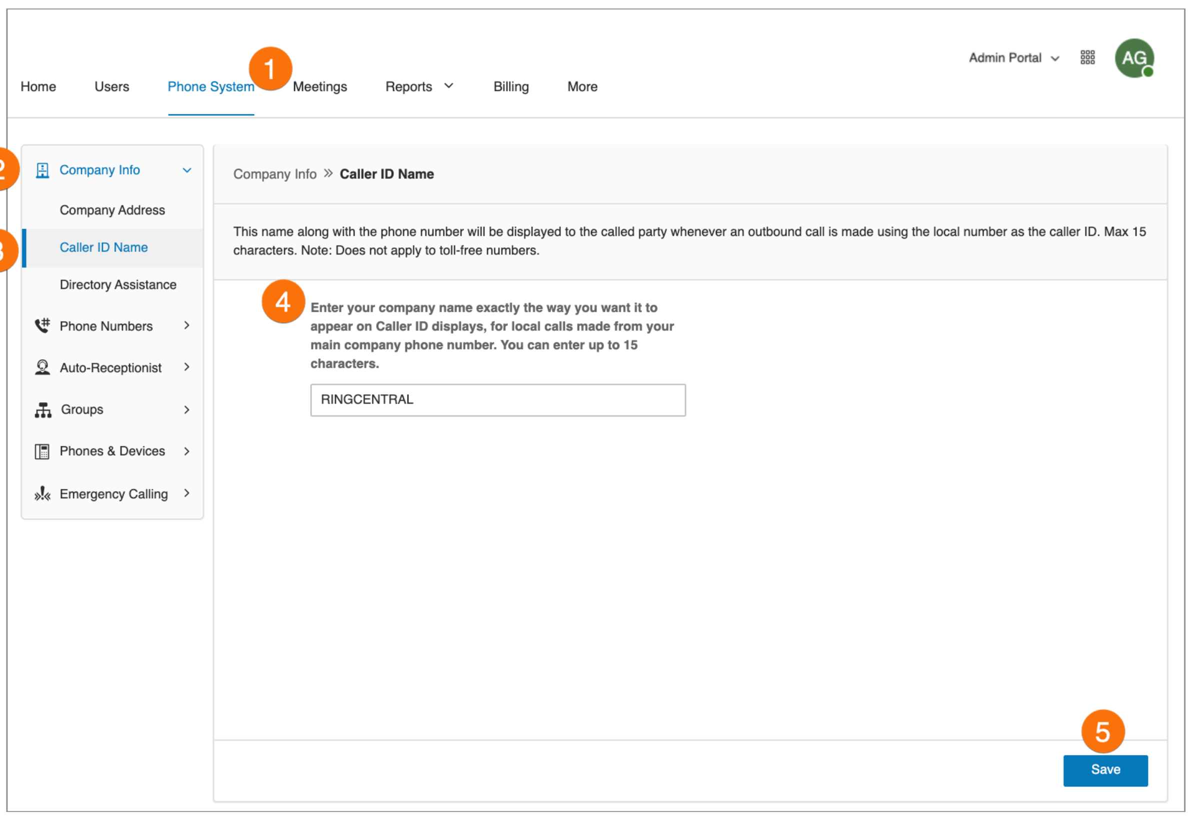
Caller ID Name

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.



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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.

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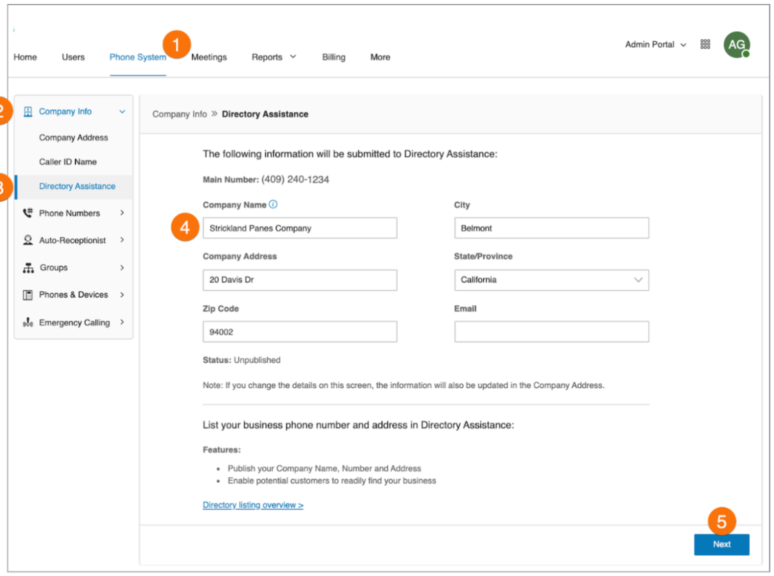
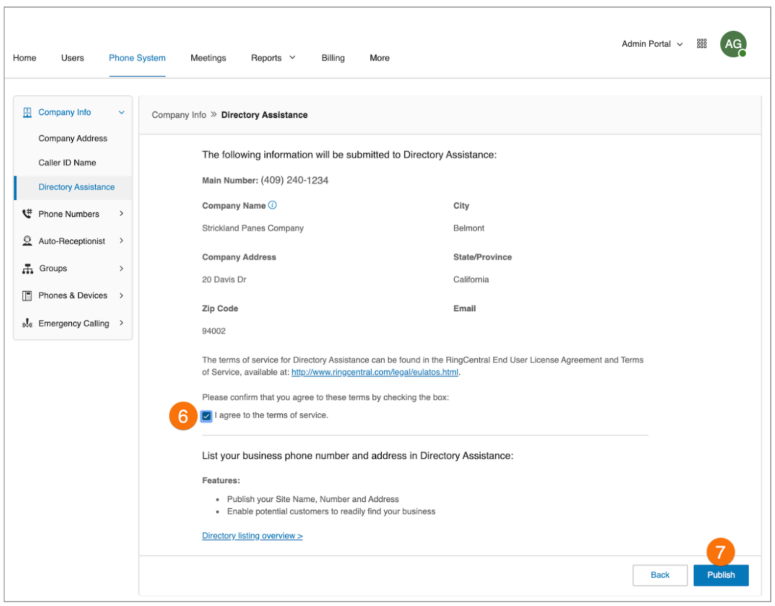

Home
Users
Phone System
1
Meetings
Reports
Billing
More
Admin Portal
AG
2
Company Info
Company Address
Caller ID Name
3
Directory Assistance
Phone Numbers
Auto-Receptionist
Groups
Phones & Devices
Emergency Calling
Company Info » Directory Assistance
The following information will be submitted to Directory Assistance:
Main Number: (409) 240-1234
Company Name
City
4
Strickland Panes Company
Belmont
Company Address
State/Province
20 Davis Dr
California
Zip Code
Email
94002
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 >
5
Next

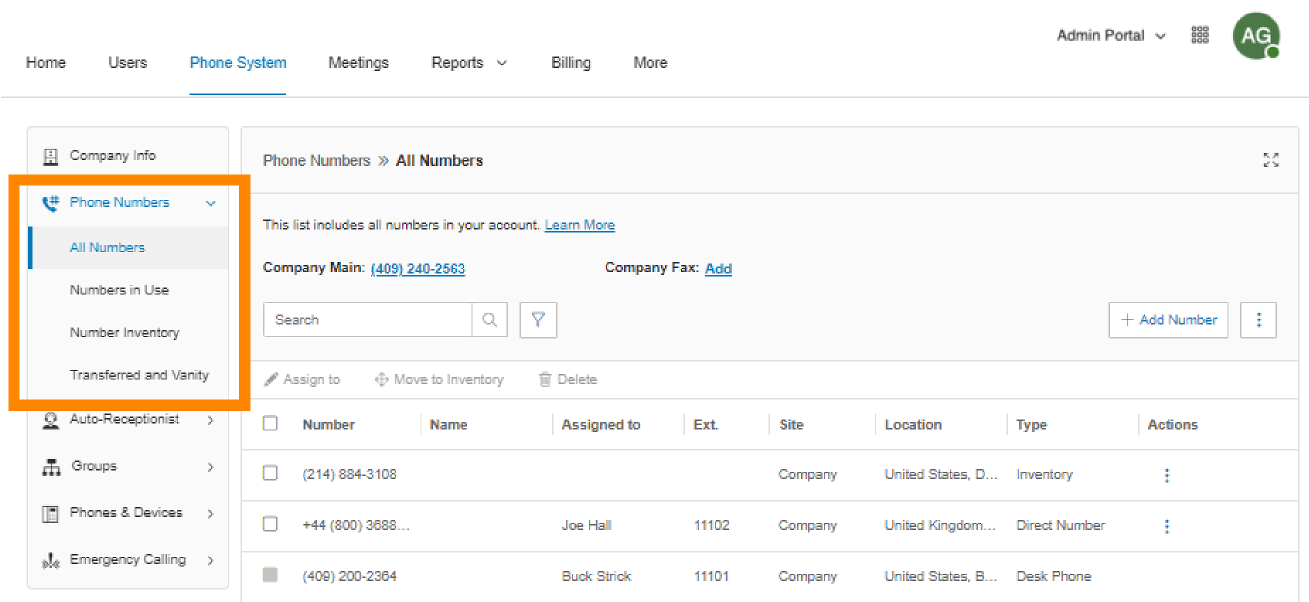

Home
Users
Phone System
Meetings
Reports
Billing
More
Admin Portal
AG
Company Info
Company Address
Caller ID Name
Directory Assistance
Phone Numbers
Auto-Receptionist
Groups
Phones & Devices
Emergency Calling
Company Info » Directory Assistance
The following information will be submitted to Directory Assistance:
Main Number: (409) 240-1234
Company Name
City
Strickland Panes Company
Belmont
Company Address
State/Province
20 Davis Dr
California
Zip Code
Email
94002
The terms of service for Directory Assistance can be found in the RingCentral End User License Agreement and Terms of Service, available at: http://www.ringcentral.com/legal/eulatos.html.
Please confirm that you agree to these terms by checking the box:
6
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 >
7
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:

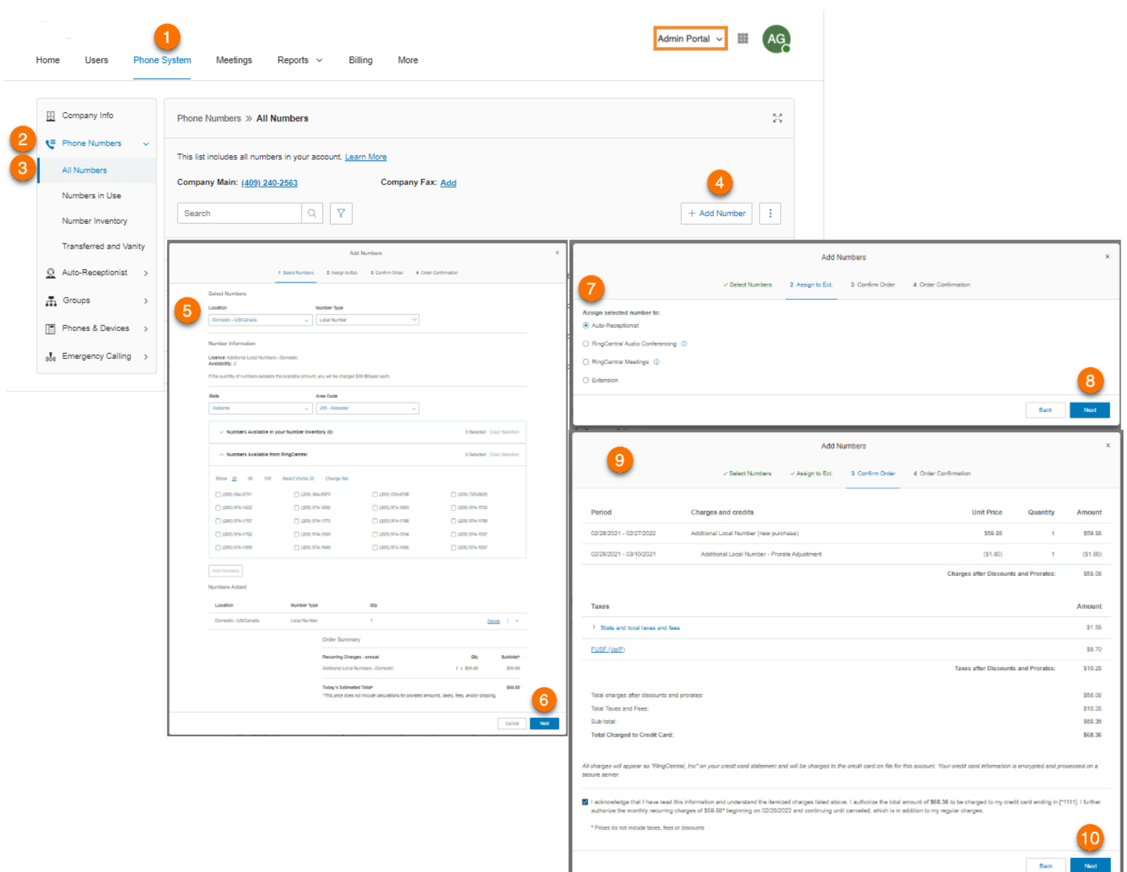
- **All Numbers**: Includes all numbers in your account.
- **Numbers in Use**: Numbers currently assigned to an extension or a device.
- **Number Inventory**: Numbers that are not assigned to a user extension or device.
- **Transferred and Vanity**: Existing numbers that have been transferred, and vanity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



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**.



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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**.

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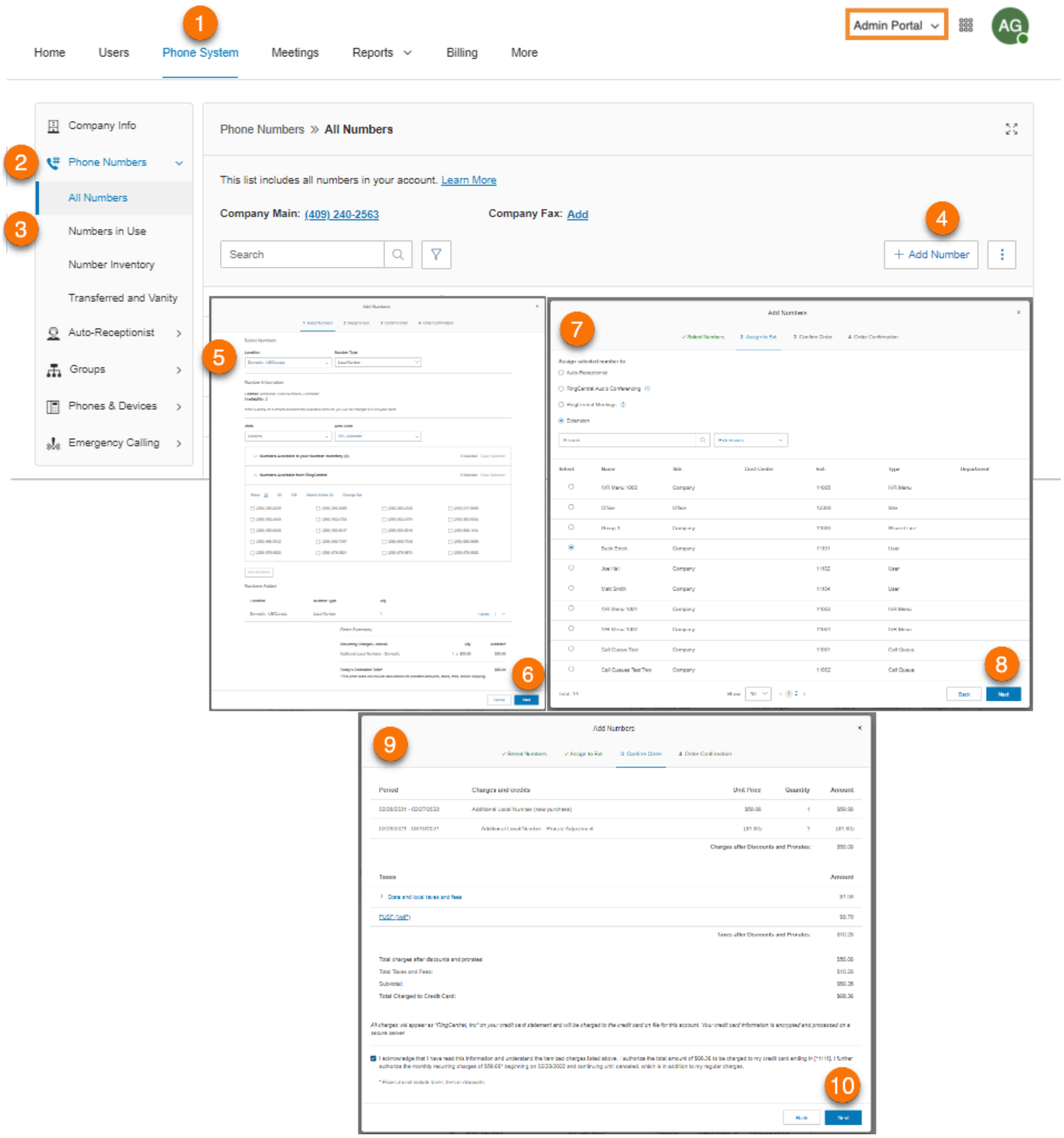
Home
Users
Phone System
Meetings
Reports
Billing
More
Admin Portal
AG
Company Info
Phone Numbers
All Numbers
Numbers in Use
Number Inventory
Transferred and Vanity
Auto-Receptionist
Groups
Phones & Devices
Emergency Calling
Phone Numbers » All Numbers
This list includes all numbers in your account. Learn More
Company Main: (409) 240-2563
Company Fax: Add
Search
+ Add Number
Add Numbers
Add Numbers
Period
Charges and credits
Unit Price
Quantity
Amount
Taxes
Amount
Total Charged to Credit Card:
1
2
3
4
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10

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**.

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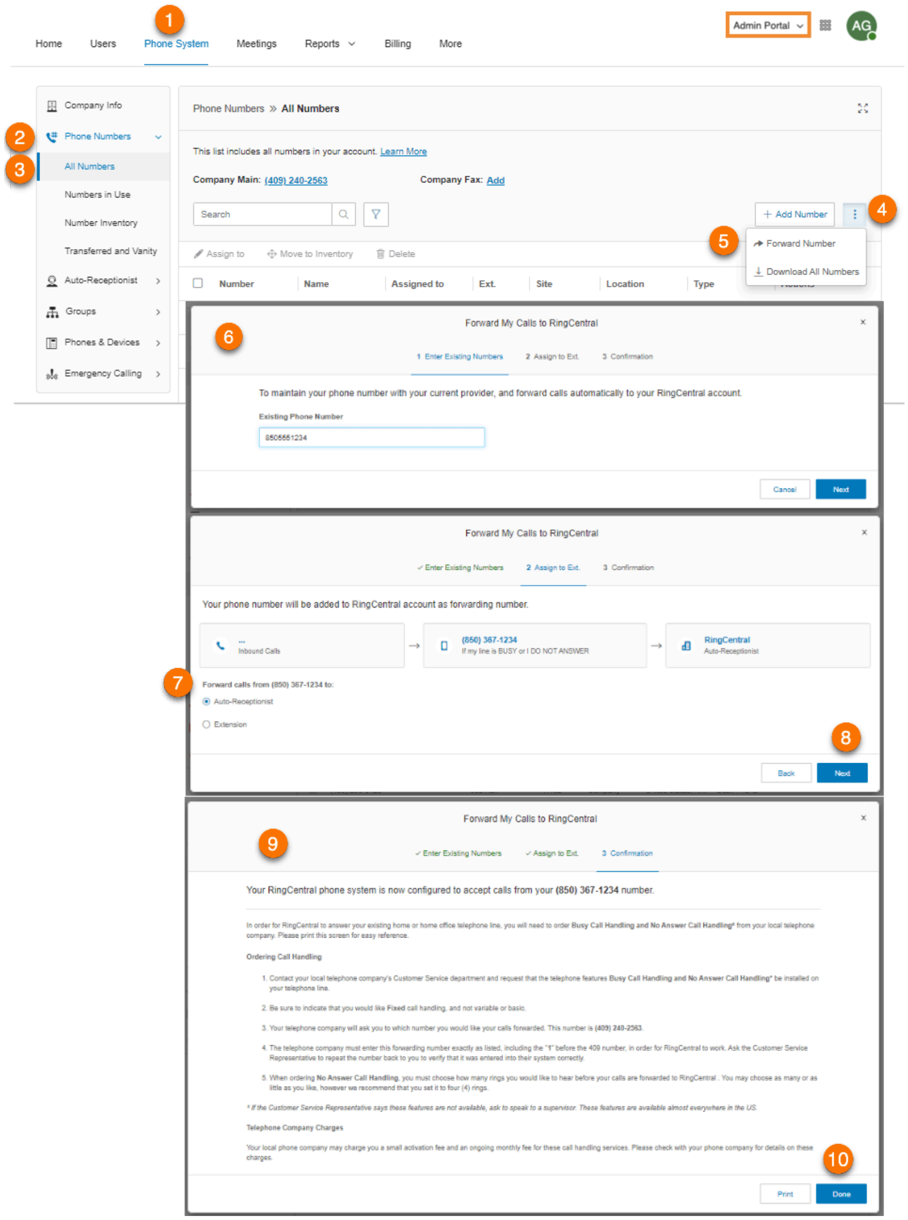

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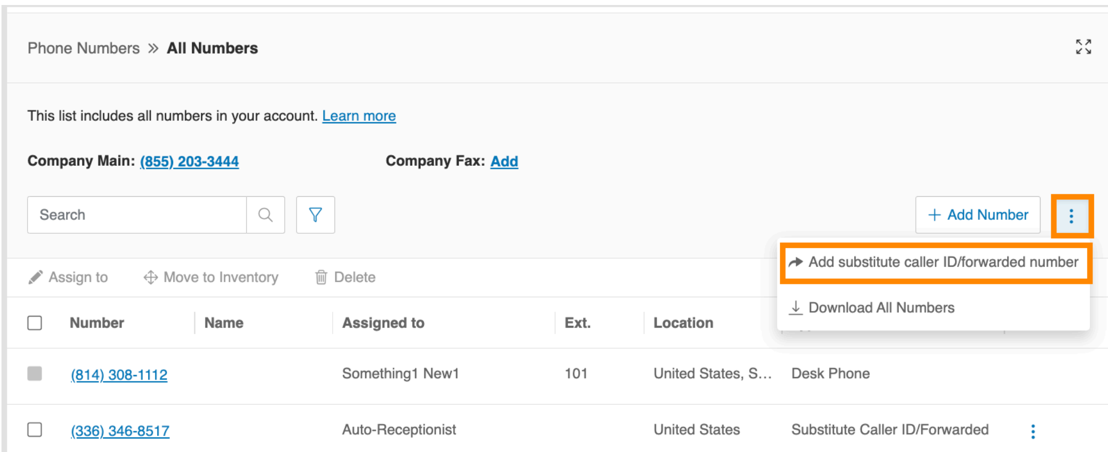
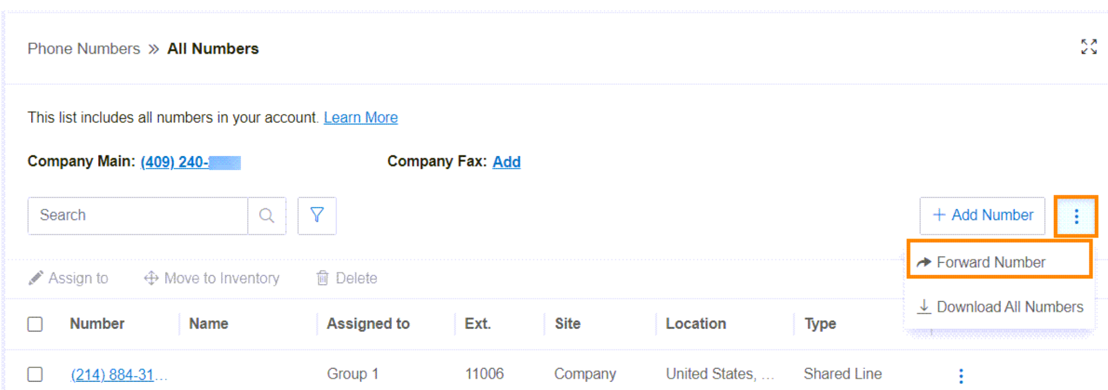
Forwarding calls to your RingCentral number

You can forward calls from a third-party number to your RingCentral number. To use your forwarded number as your outbound caller ID, you'll need to submit certain documents to RingCentral.

1. Go to the Admin Portal and sign in.
2. Click **Phone System > Phone Numbers > All Numbers or Numbers in Use.**
3. Click the three-dot **More** icon at the right, then select **Add substitute caller ID/forwarded number** (for countries that support substitute caller ID) or **Forward Number** (for countries that don't support substitute caller ID).

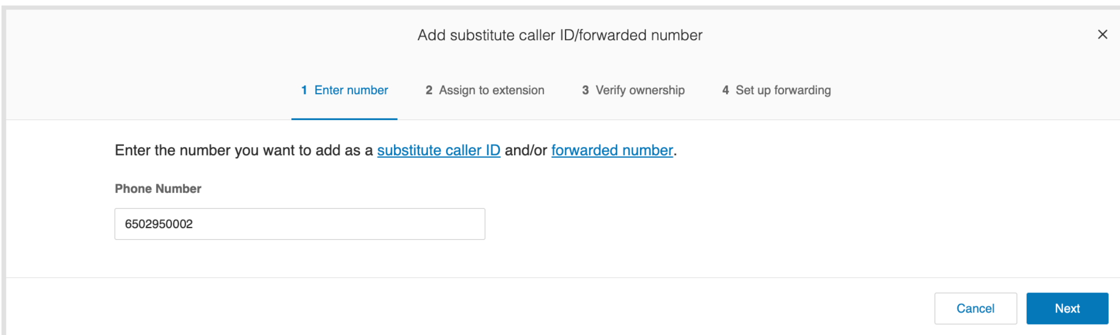




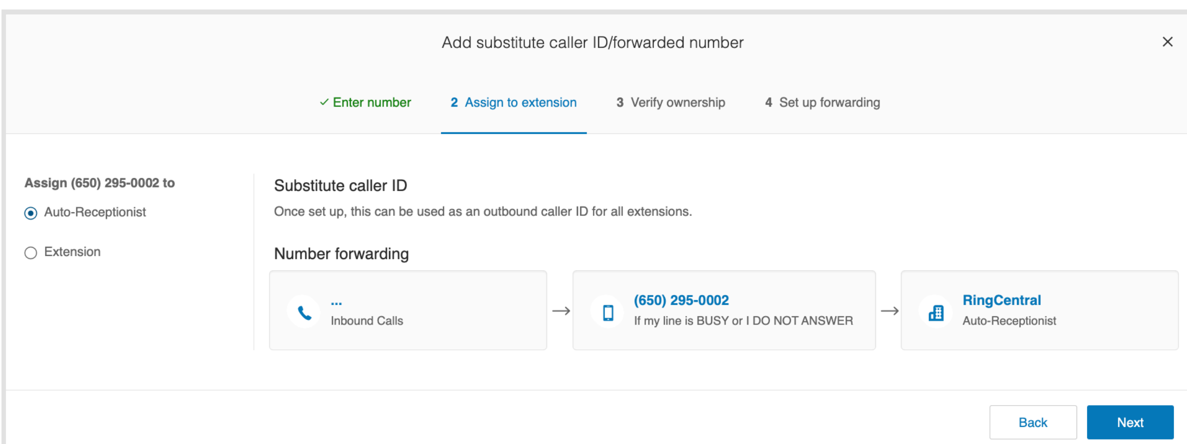
4. In the **Phone Number** field, enter the number you want to add as a substitute caller ID and/or forwarded number, then click **Next**.

   Note: Supported phone numbers include local, mobile, and toll-free numbers. An international number may not be used as a substitute caller ID or forwarded number.

- **Substitute caller ID:** Maintain your phone number with your current provider and use it as your RingCentral account's outbound caller ID.
    - Note: You cannot use mobile numbers as substitute caller IDs when forwarding mobile number calls to RingCentral. Please reach out to support to have the mobile numbers enabled.
- **Forwarded number**: Maintain your phone number with your current provider, and when it's busy or there's no answer, forward calls to your RingCentral account.



5. On the left, choose whether to forward your calls to **Auto-Receptionist** or **Extension**, then click **Next**.



- **Auto-Receptionist**: Can be used as an outbound caller ID for all extensions that will be enabled when you submit the required documents.
- **Extension**: Can be used as an outbound caller ID only for the selected extension when you submit the required documents. If you select **Extension**, click the **Select Extension** button, then select the extension to which you want to forward your calls in the **Select Extension** window. Click **Select** when done. The extension's call handling and forwarding rules will be implemented.

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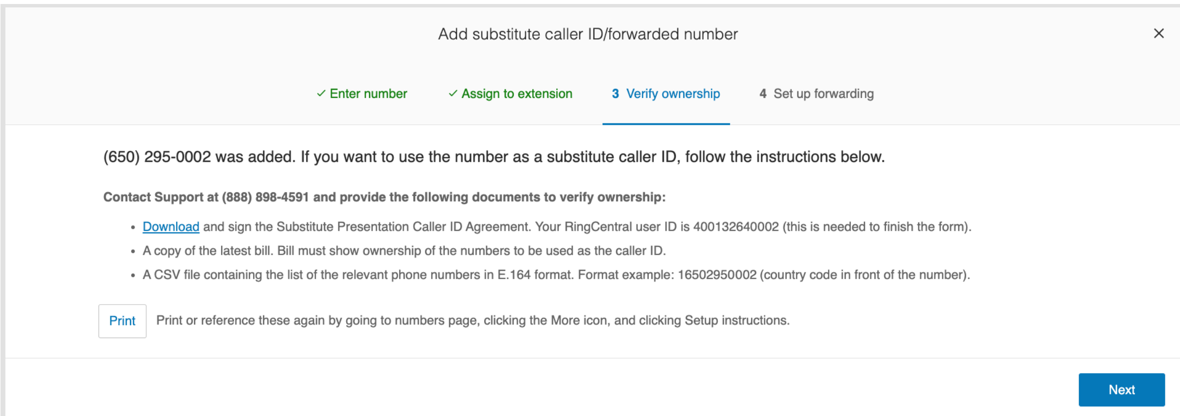
6. Verify the ownership of your substitute caller ID number by contacting RingCentral support to provide the following documents:
    a. The Outbound Caller ID Substitution Agreement for RingCentral RingEX. (Download this agreement as a PDF.) You need your RingCentral user ID to fill out this form.
    b. A copy of the most recent bill that demonstrates ownership of your substitute caller ID number(s).
    c. A CSV file of the list of relevant phone numbers, listed in E.164 format.
    d. Click **Next** when done.



7. Before clicking **Done in the Set up forwarding section, note that you'll need to order Busy Call Handling** and **No Answer Call Handling** from your local telephone company so that RingCentral can answer your existing home or home office telephone line.

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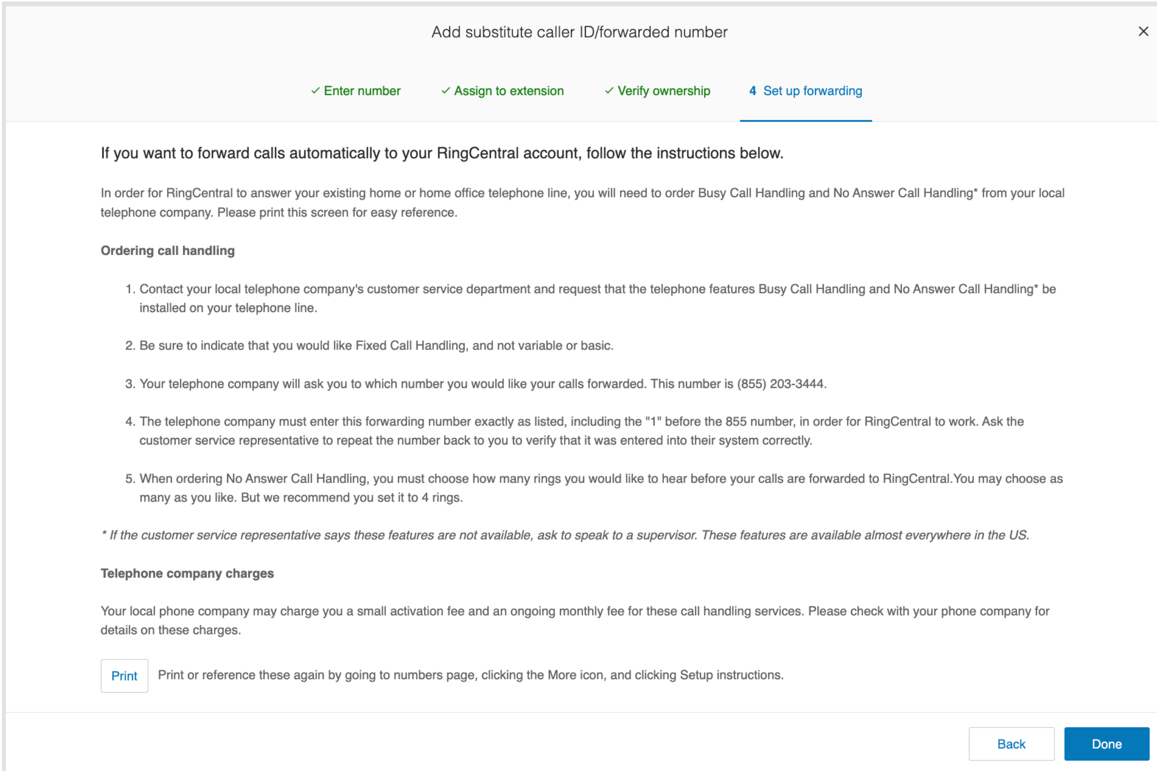

Ordering Call Handling

a. Contact your local telephone company's customer service department and request that **Busy Call Handling** and **No Answer Call Handling*** be installed on your telephone line.
b. Explain that you would like **Fixed call handling**, not variable or basic.
c. Your telephone company will ask you which number you want your calls forwarded to. For the number to work with RingCentral, the telephone company must enter this forwarding number exactly as listed, including the 1 before the area code. Ask the representative to verify the number.
d. When ordering **No Answer Call Handling**, you must choose how many rings you want to hear before your calls are forwarded to RingCentral. You may choose as many or as few as you like. We recommend setting it to four (4) rings.

**If the customer service representative says these features are unavailable, 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 an activation fee and/or an ongoing monthly fee for adding these services. Check with your phone company for details about such charges.

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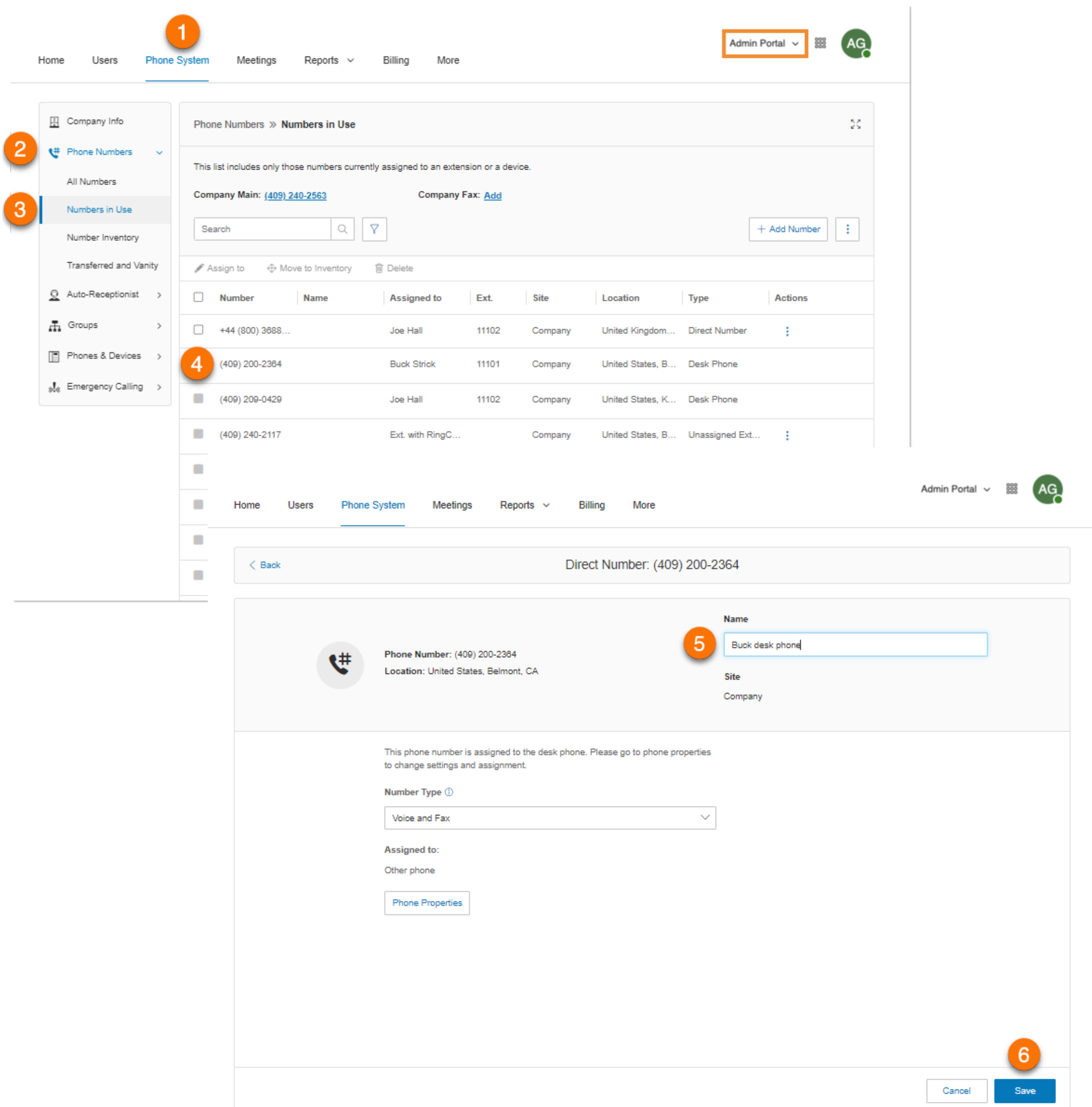
Naming phone numbers

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**.



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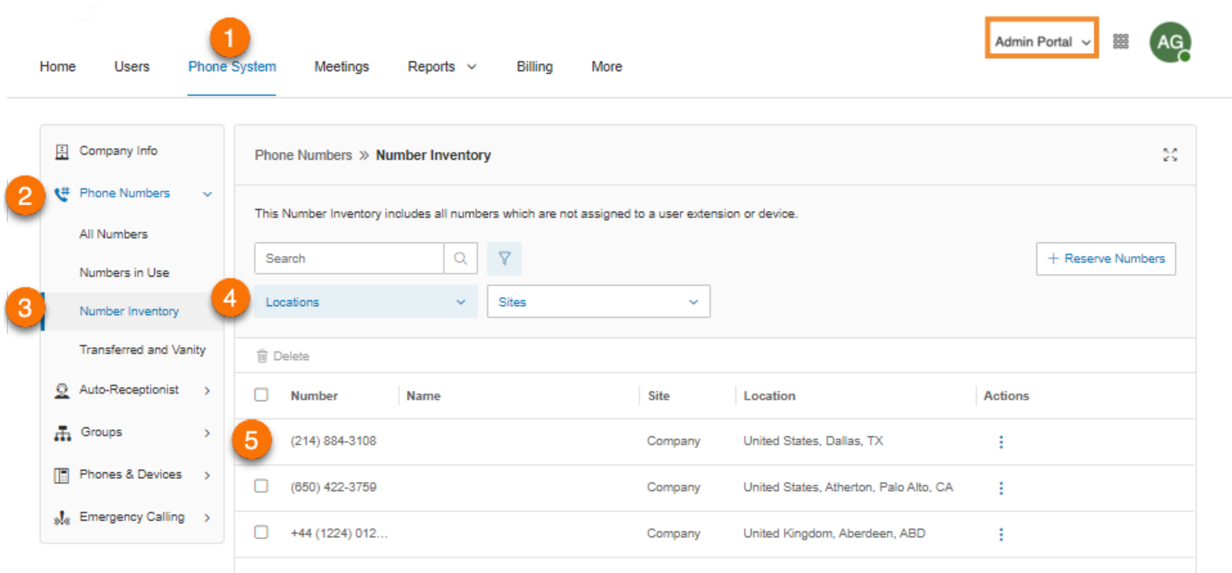
Viewing unassigned numbers

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

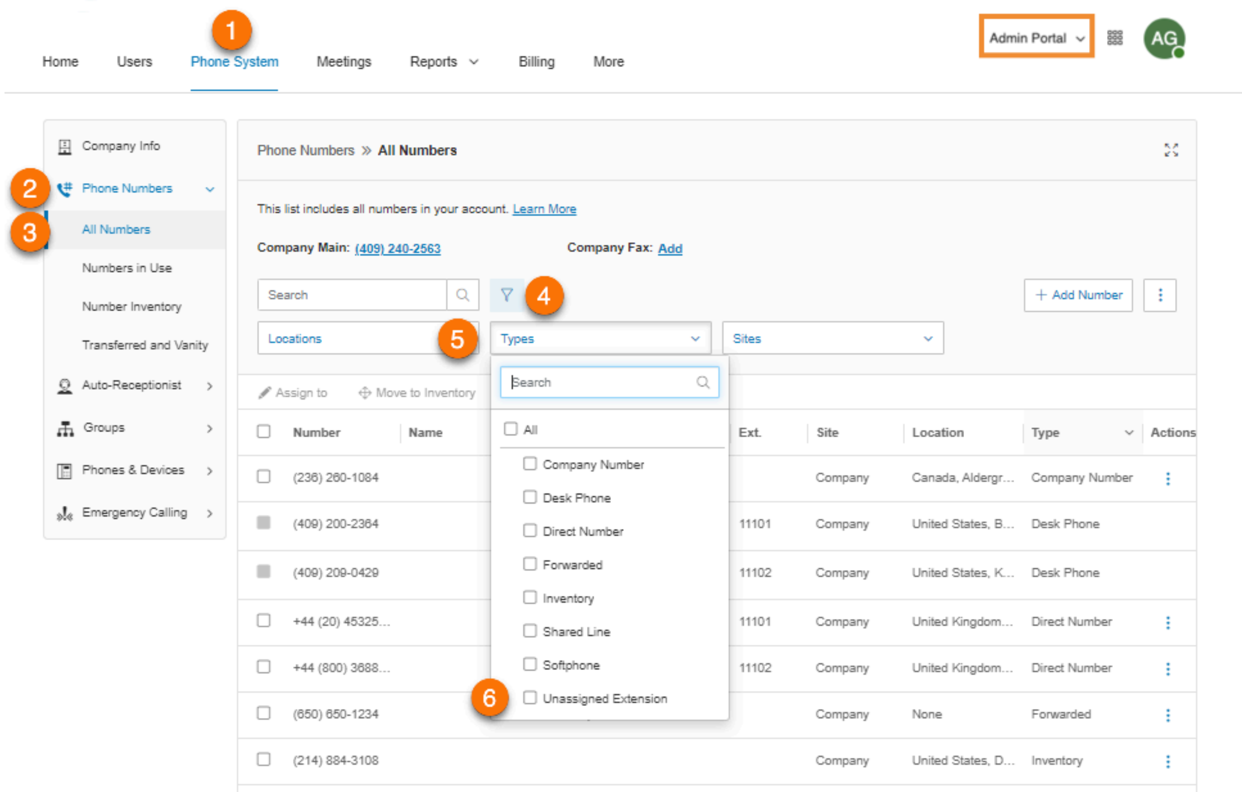
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **Number Inventory**.
4. Filter the numbers by **Locations** and **Sites**.
5. Click a number to see more information.

You can view phone properties in the Phones & Devices tab.



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*.



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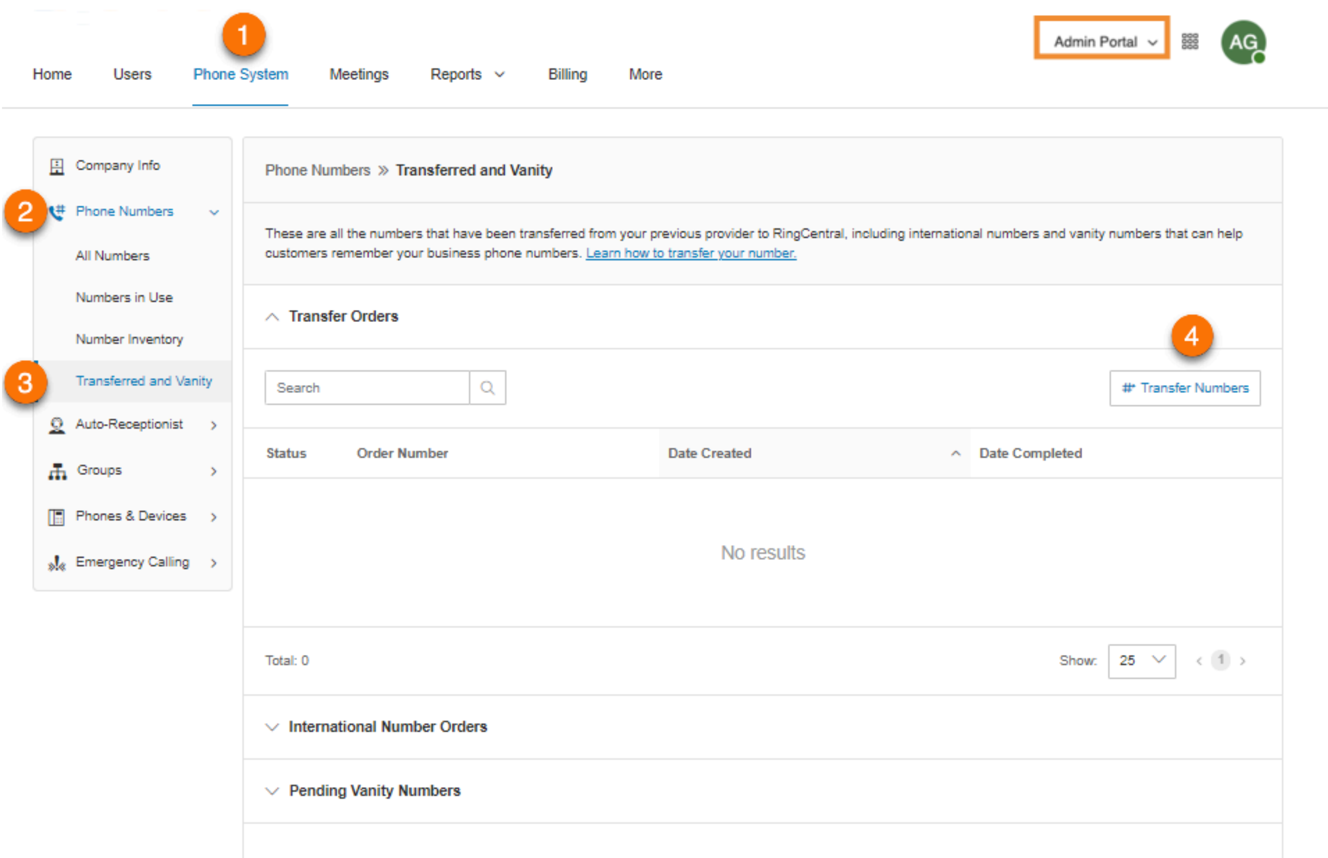
Viewing transferred and vanity numbers

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.



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Viewing number blocks

Many RingCentral customers are based in the EU, UK, and other geographical areas outside of North America. These countries and other geographical areas have regulations and lengthy processes for telephone number acquisition.

Companies acquire additional numbers, more than the current need, to account for their growing business. This results in a need to store the extra numbers not currently in use, especially when they port numbers from other phone providers over to RingCentral. These numbers can be in contiguous sequences (or number blocks), or they can be stragglers.

With this feature, customers can store these "held numbers" on their accounts without having to pay a reserved number fee* and easily assign them to users or lines as that need arises.

**While there isn't a billing license fee for "held numbers" in number blocks storage (not in use), we plan to introduce a nominal license fee in 2023. Number blocks that are in use will follow the current pricing structure."*

Viewing number blocks via filter

1. Go to the Admin Portal and sign in.
2. Go to **Phone System > Phone Numbers**, then select any of these tabs:
    - **All Numbers**
    - **Numbers in Use**
    - **Number Inventory**
3. Click the filter funnel icon.
4. Select a number block on the **Number Block** filter.

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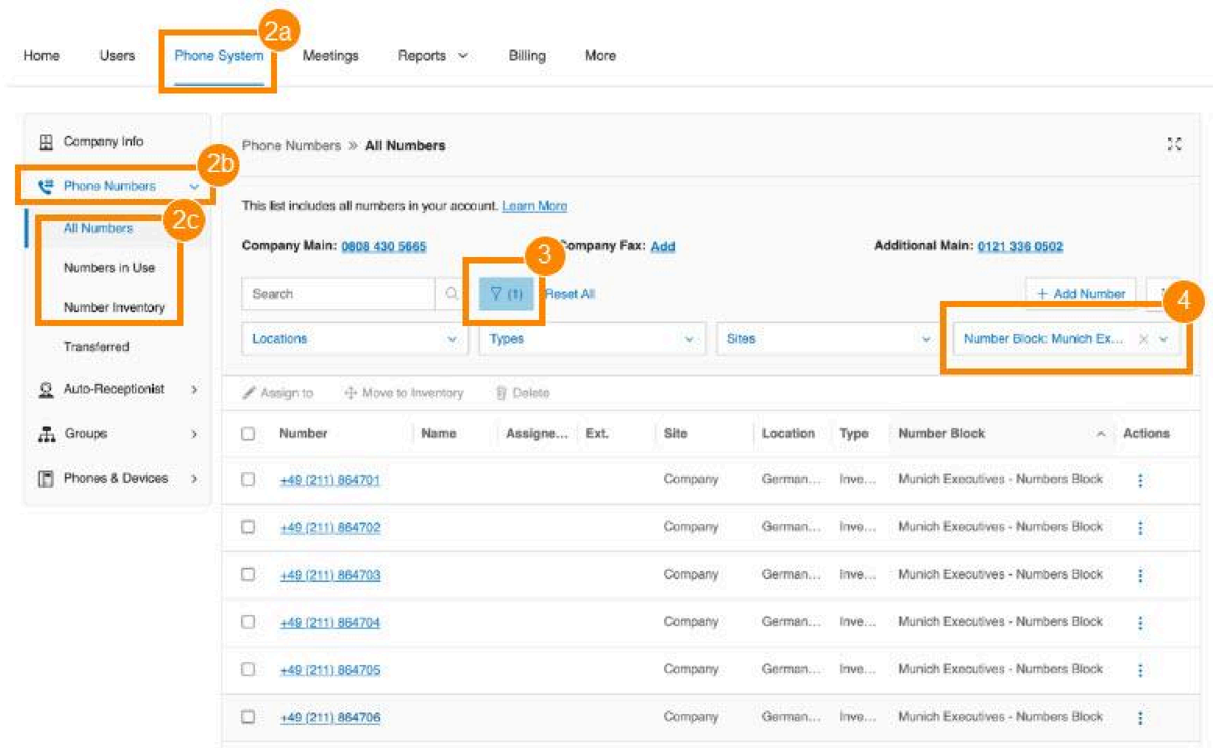

Note:

- The **Number Block** filter and **Number Block** column are only available if the account has a number block.
- The numbers on the **Number Inventory tab** are not assigned to a user extension or device. Numbers in a number block don't have a number license yet. A standard license fee will be charged when they are assigned.

Viewing number blocks via Transferred tab

1. Go to the Admin Portal and sign in.
2. Go to **Phone System > Phone Numbers > Transferred**.
3. Select the **Number Blocks** tab. You'll see a list of the number blocks in your account.

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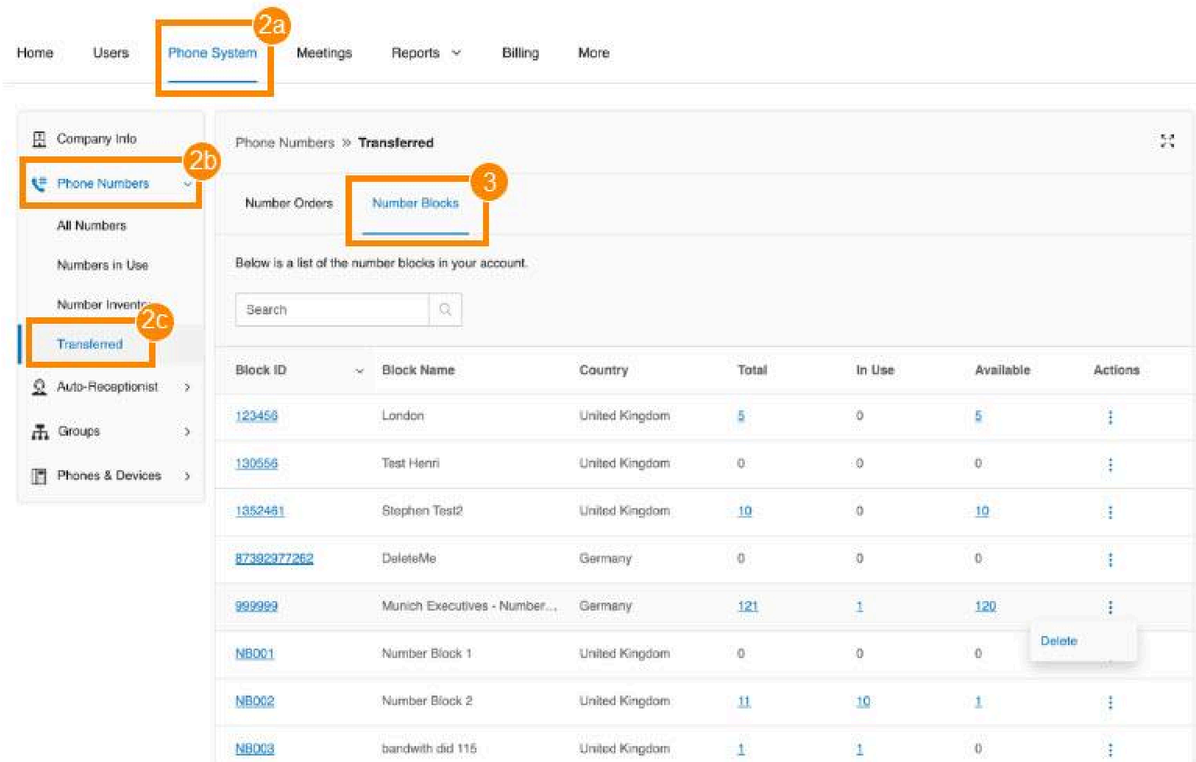

Viewing block details

1. Go to the [Admin Portal]() and sign in.
2. Go to **Phone System > Phone Numbers > Transferred**.
3. Select the **Number Blocks** tab. You'll see a list of the number blocks in your account.
4. Click on a **Block ID** to view all the numbers in this block. You can change the block **Name** on the upper-right side of this page.

Setting up auto number blocks

You can hold numbers with auto block creation without having to pay reserved number fees. Numbers will be easily and readily available for use.

- Auto enabled for new sign-ups
- Disabled by default for existing accounts
- No charge until number is assigned to an extension
- Cannot delete numbers in Admin Portal

Global office customers with US/CAN numbers can place their US numbers in a Block via SCP, with the help of the Porting Team.

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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.

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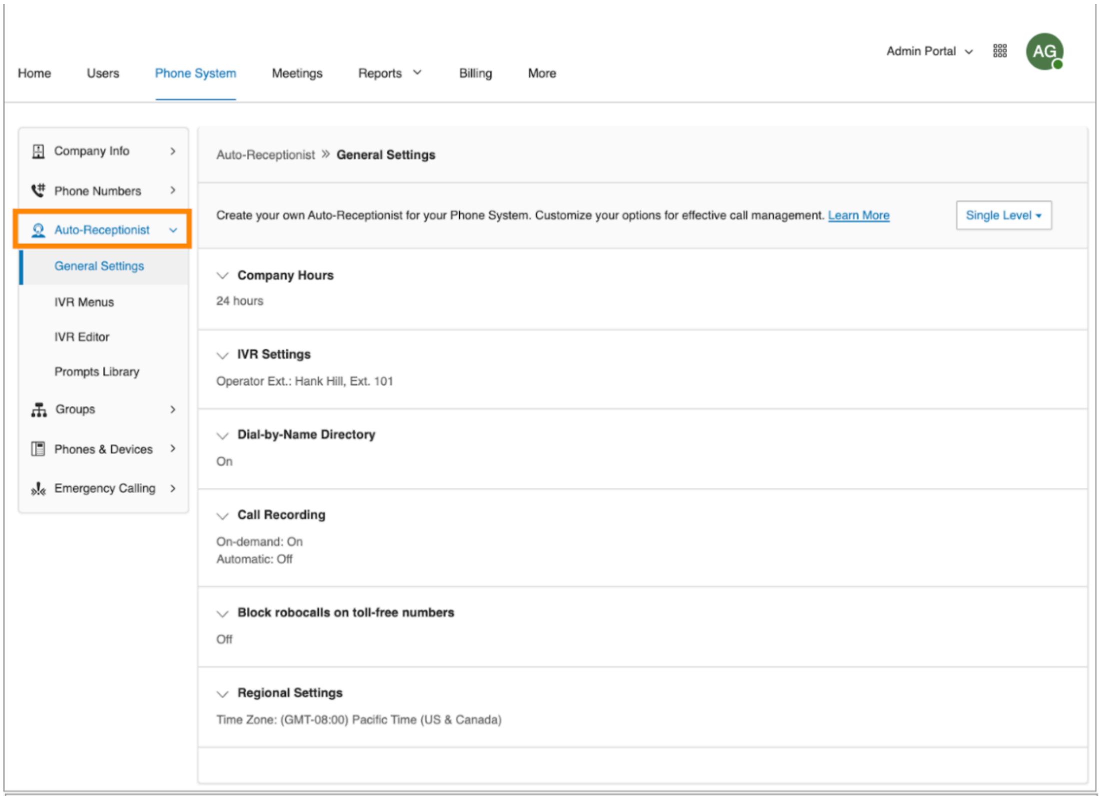

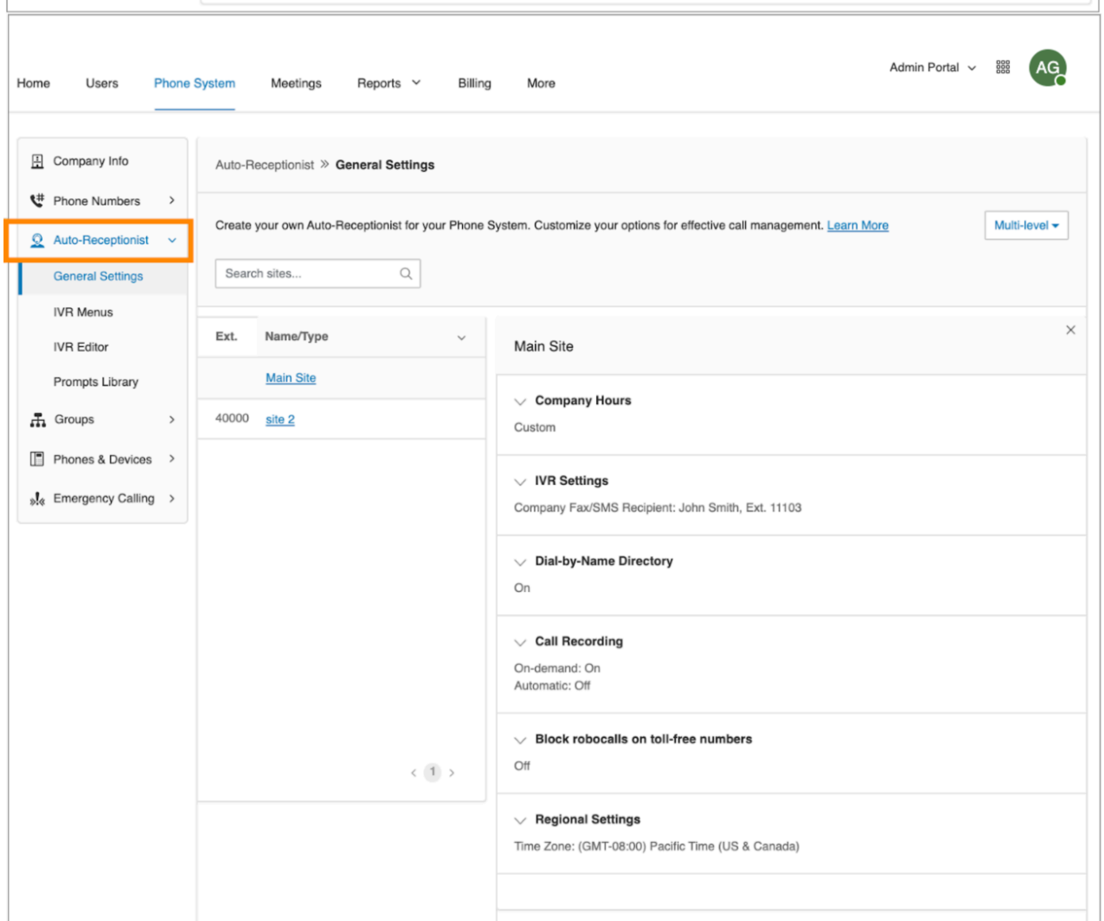

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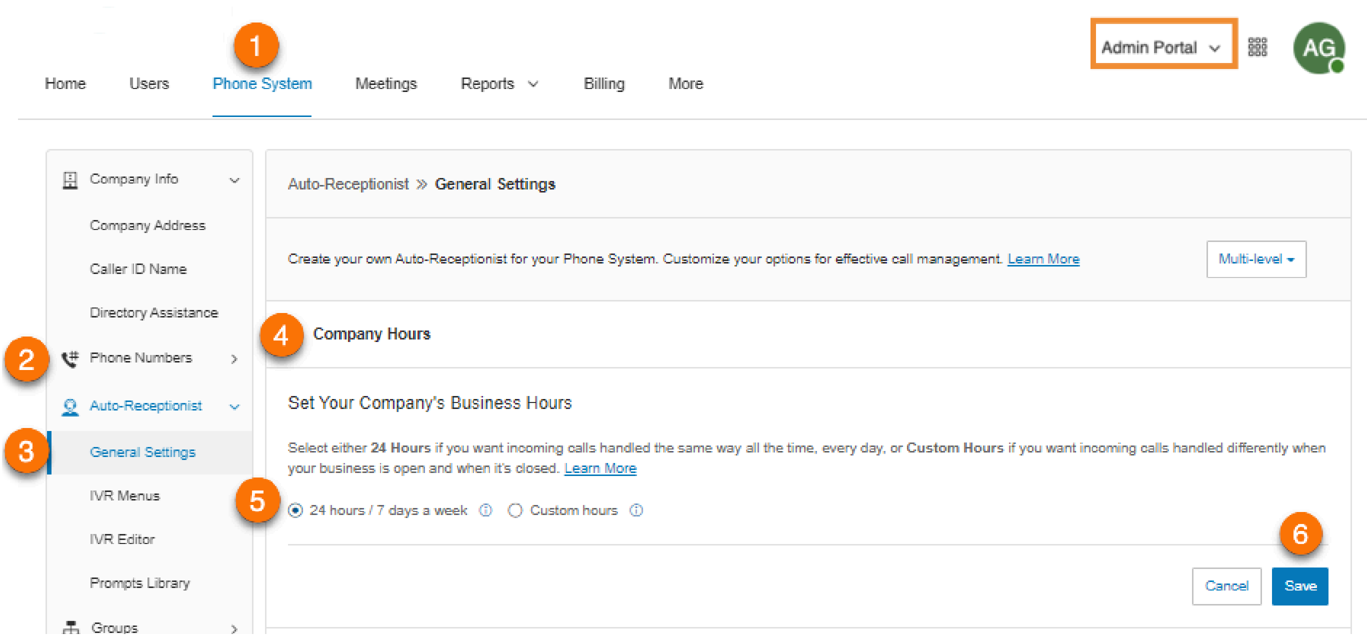
Company business hours

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.



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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.

Learn more about Company call handling.

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.

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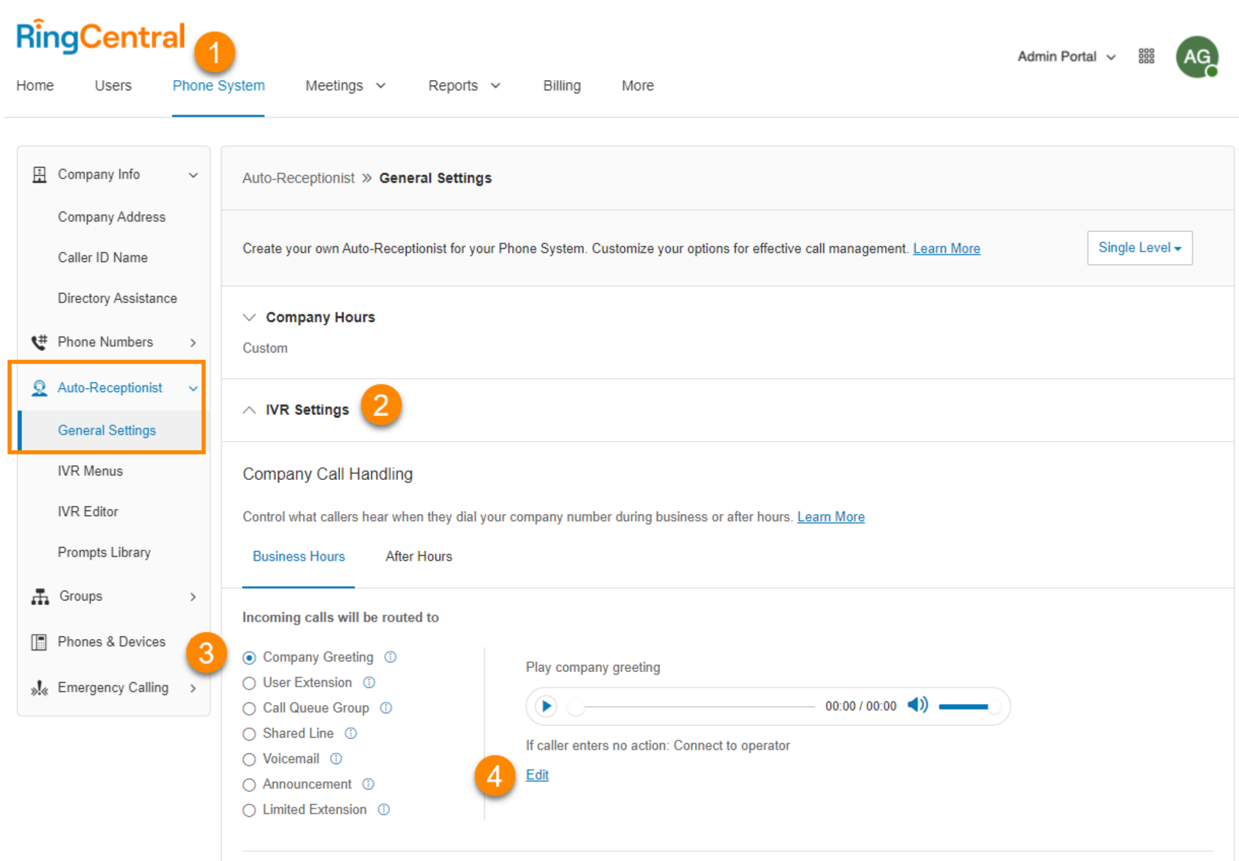

5. For **Set Greeting**, select:
    - *Default*: Plays system default greeting.
    - *Custom*: Plays your custom recording. Select one of the following to record your greeting:
        - **Phone**: Choose a phone number from the dropdown menu if you have saved numbers or select *Enter a new number* 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**.

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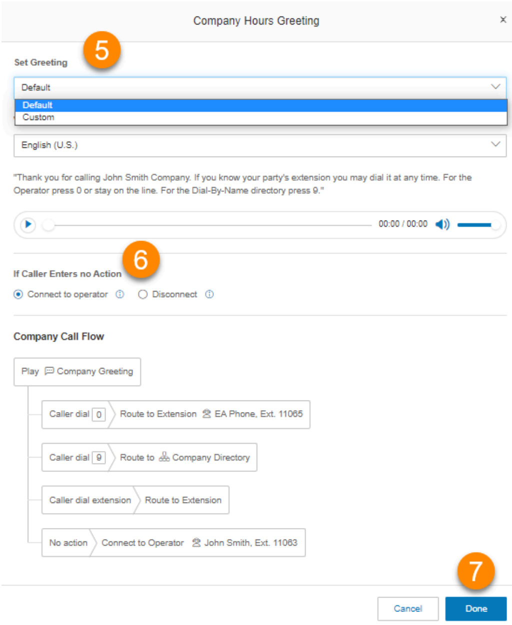
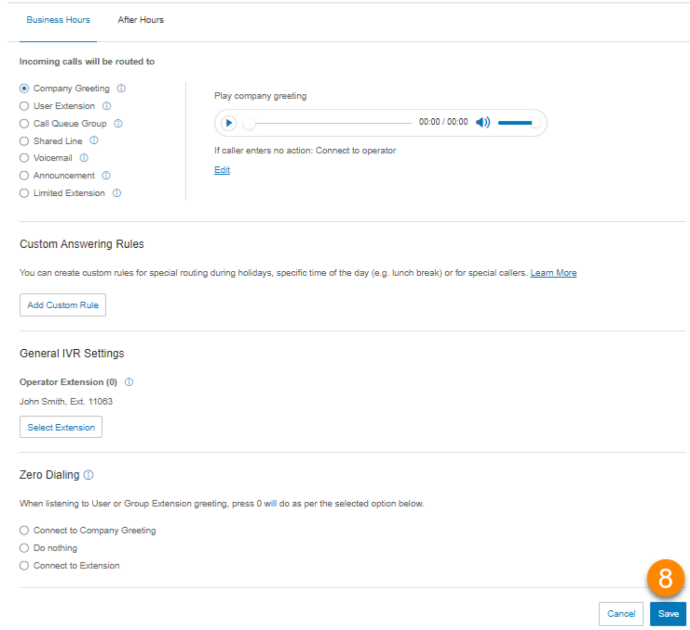

Company Hours Greeting
5
Set Greeting
Default
Default
Custom
English (U.S.)
"Thank you for calling John Smith Company. If you know your party's extension you may dial it at any time. For the Operator press 0 or stay on the line. For the Dial-By-Name directory press 9."
00:00 / 00:00
6
If Caller Enters no Action
Connect to operator
Disconnect
Company Call Flow
Play Company Greeting
Caller dial 0 Route to Extension EA Phone, Ext. 11065
Caller dial 9 Route to Company Directory
Caller dial extension Route to Extension
No action Connect to Operator John Smith, Ext. 11063
7
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. 11063
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
8
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**.

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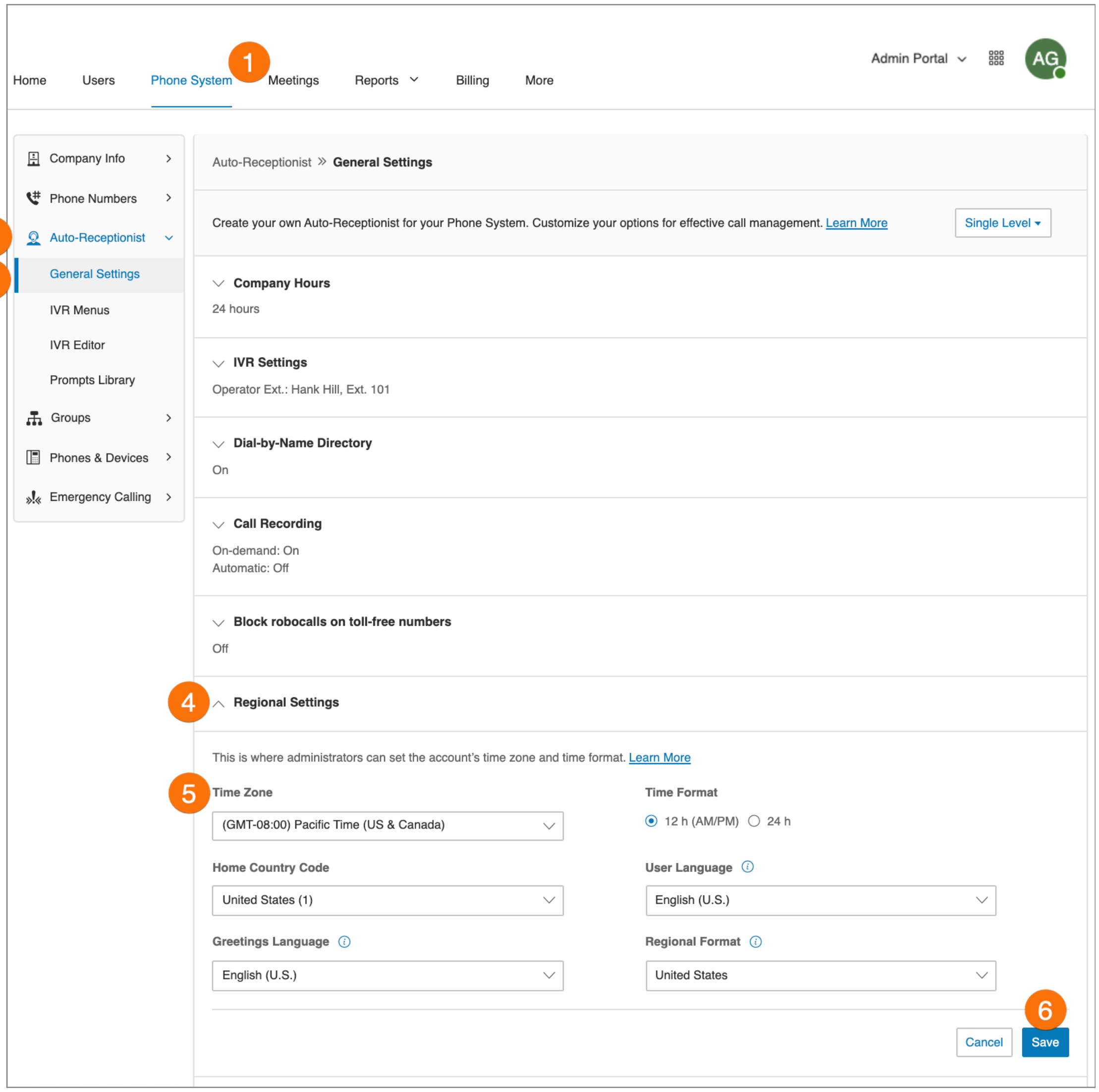
Home
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Phone System
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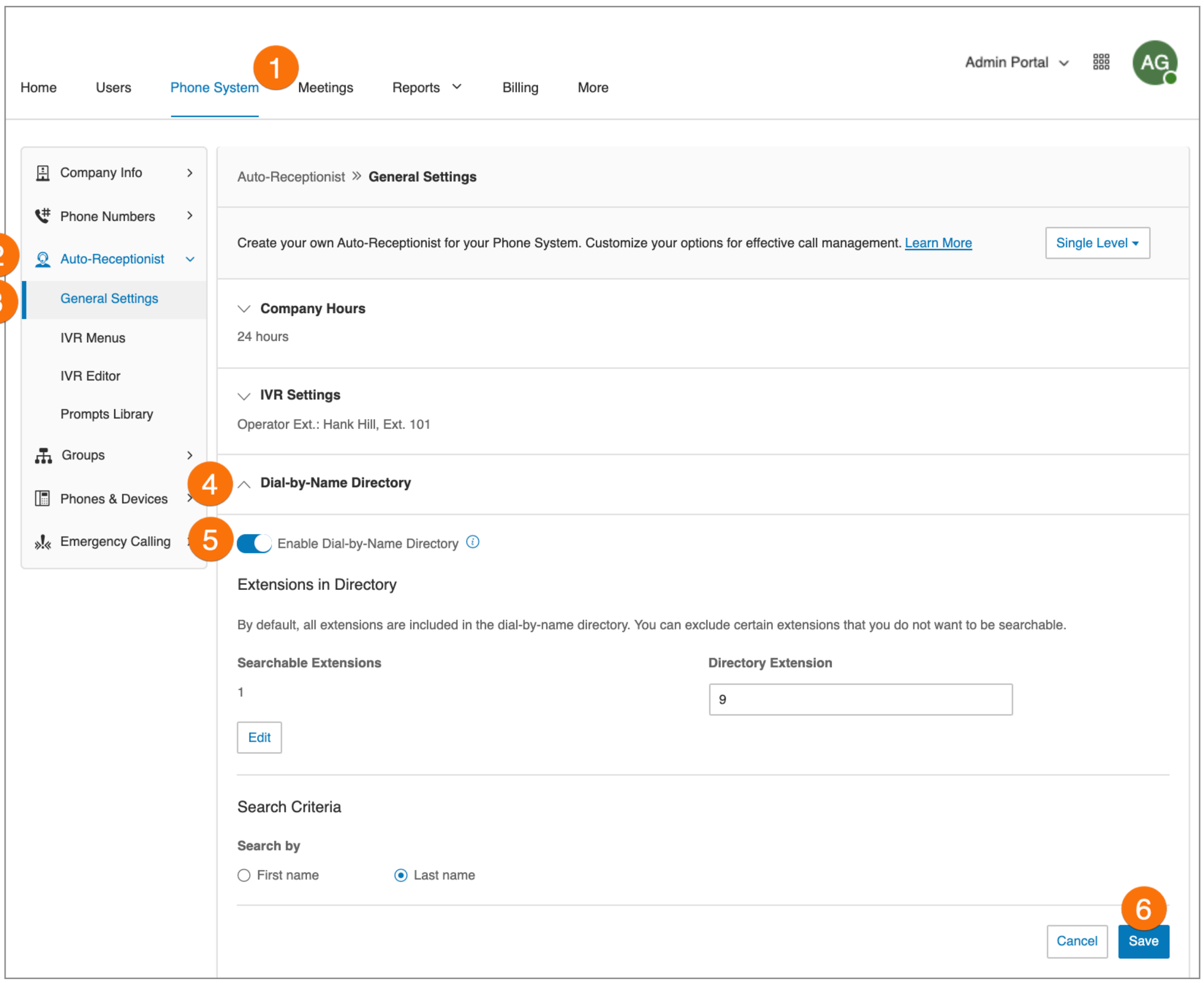
Reports
Billing
More
Admin Portal
AG
Company Info
Phone Numbers
Auto-Receptionist
General Settings
IVR Menus
IVR Editor
Prompts Library
Groups
Phones & Devices
Emergency Calling
Auto-Receptionist » General Settings
Create your own Auto-Receptionist for your Phone System. Customize your options for effective 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
1
2
3
4
5
6

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 dialpad 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**.



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Operator extension

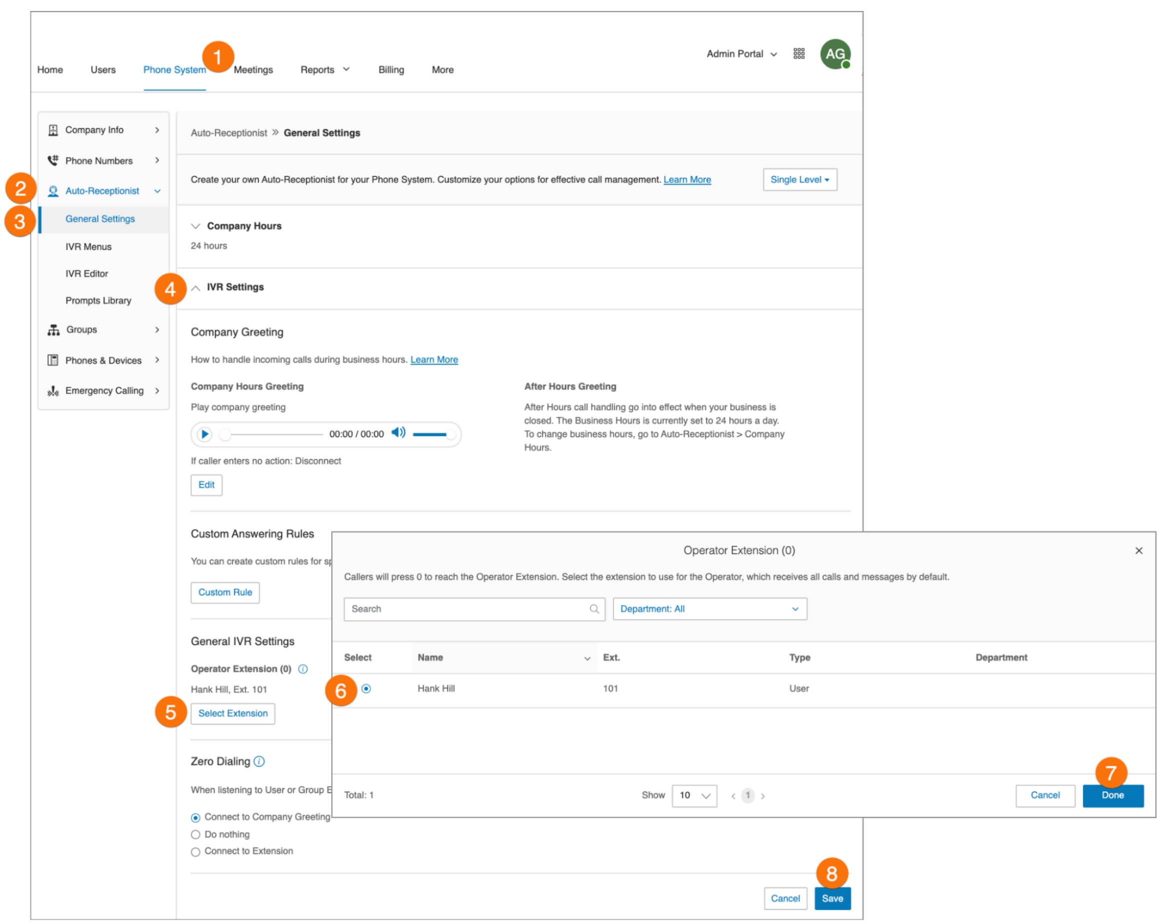
Select the extension to use for the operator, which receives all calls and messages by default. The operator extension is 101 by default.

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.



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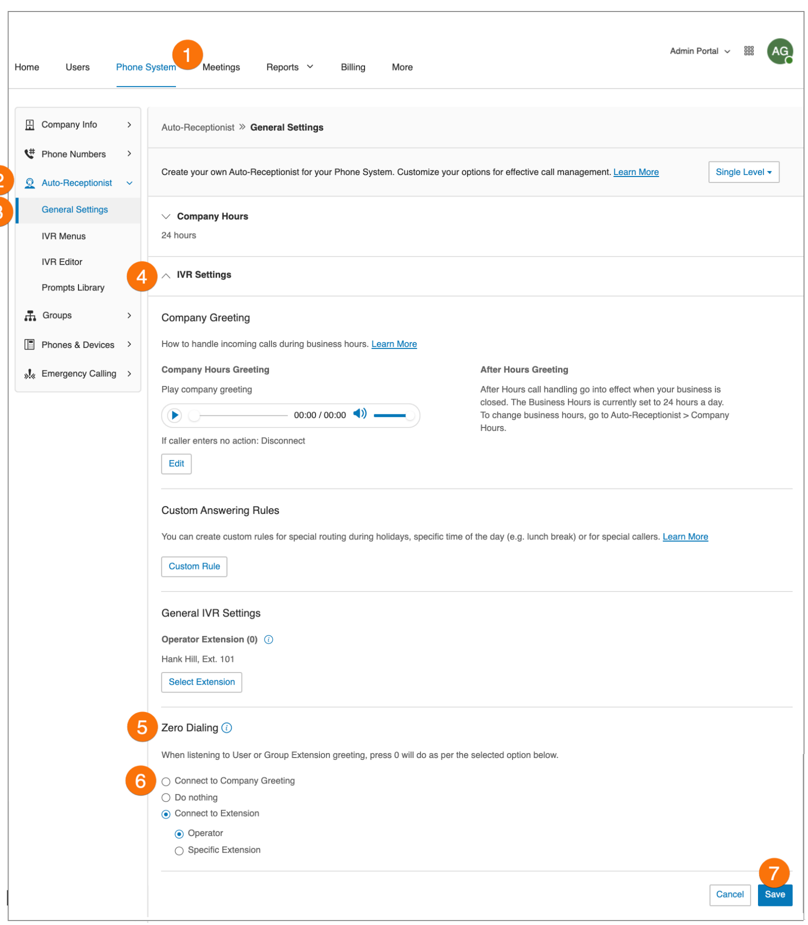
Zero dialing

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.

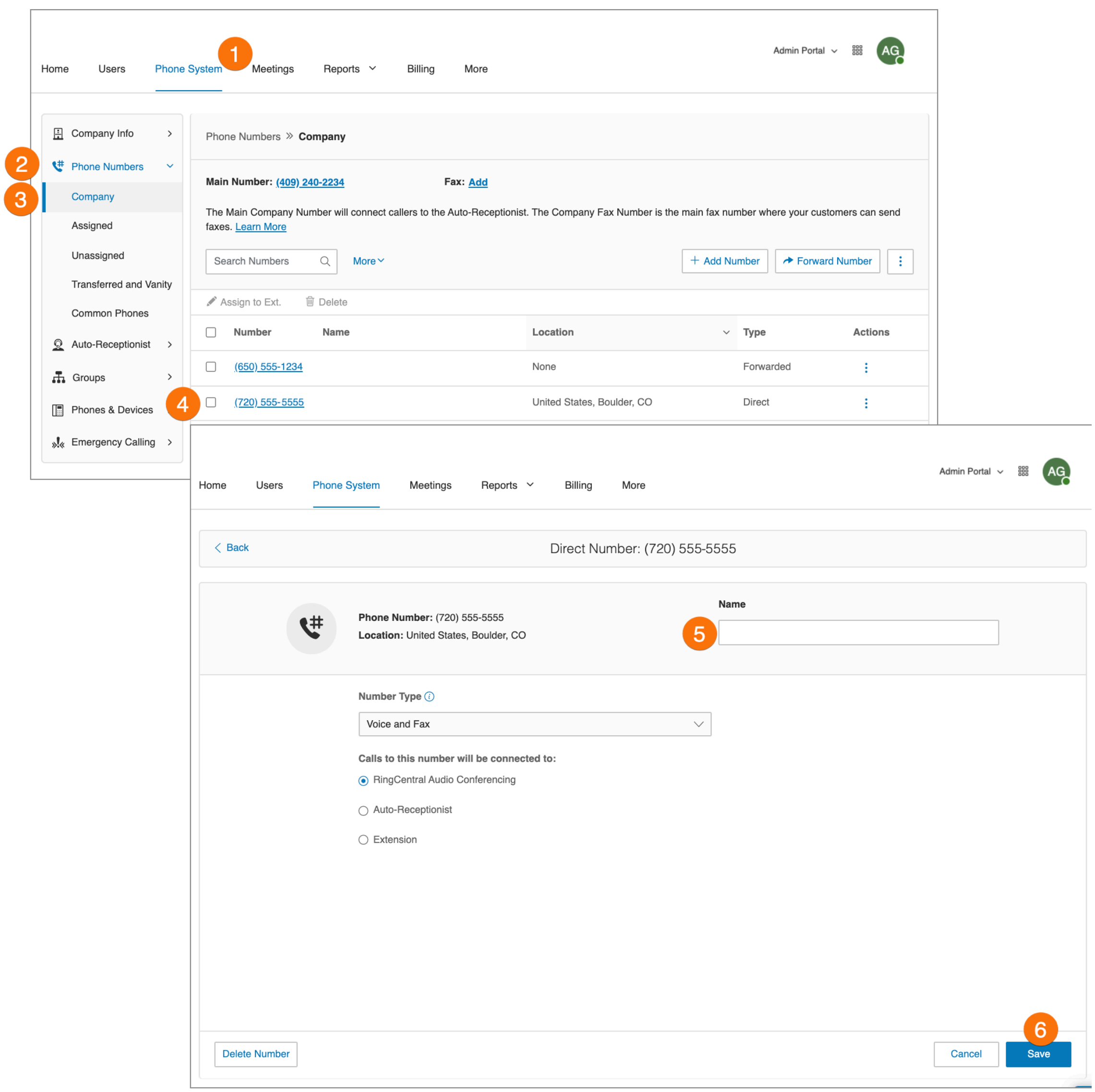


Name or label definitions

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.



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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 dialpad.

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**.

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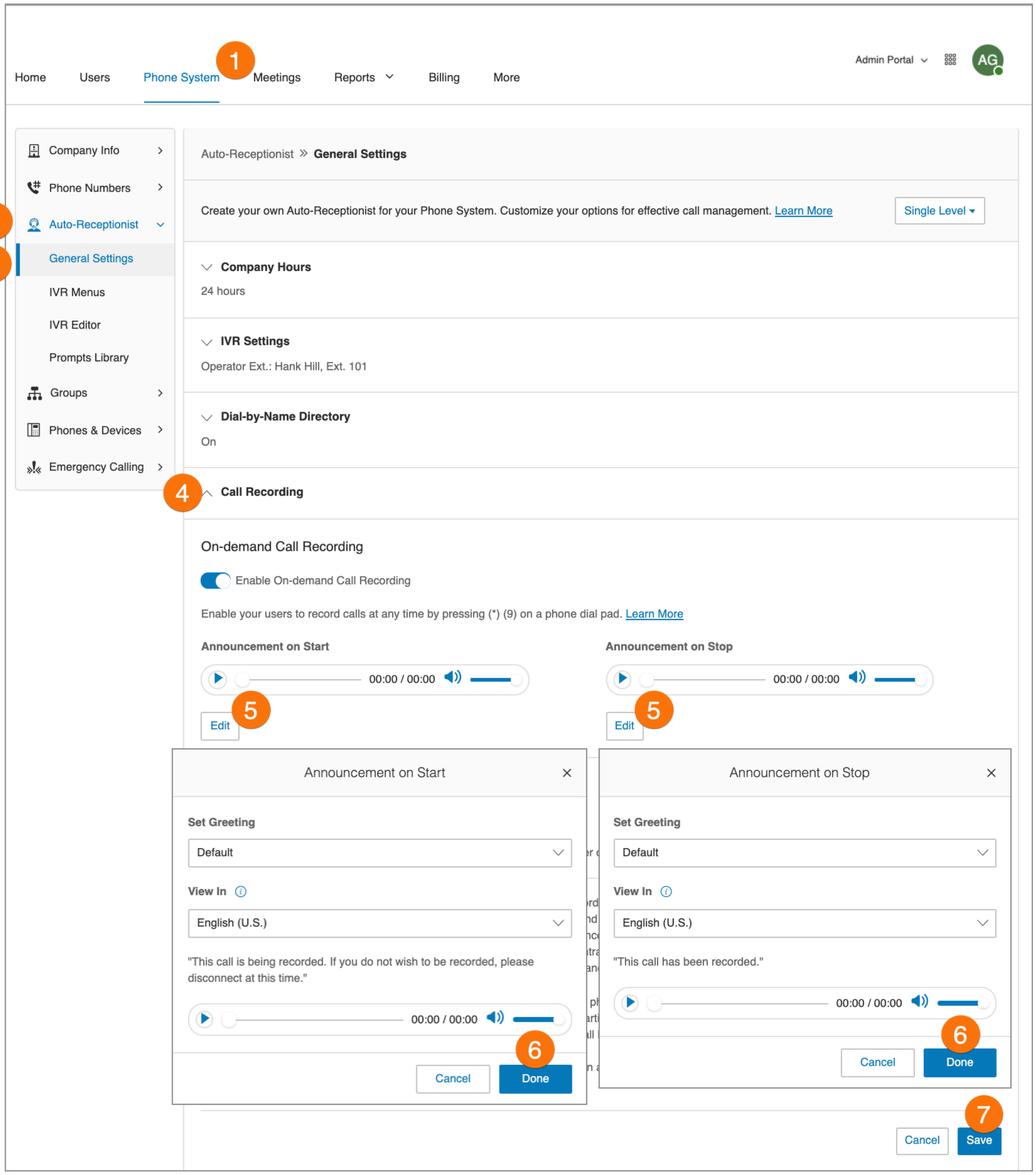
Home
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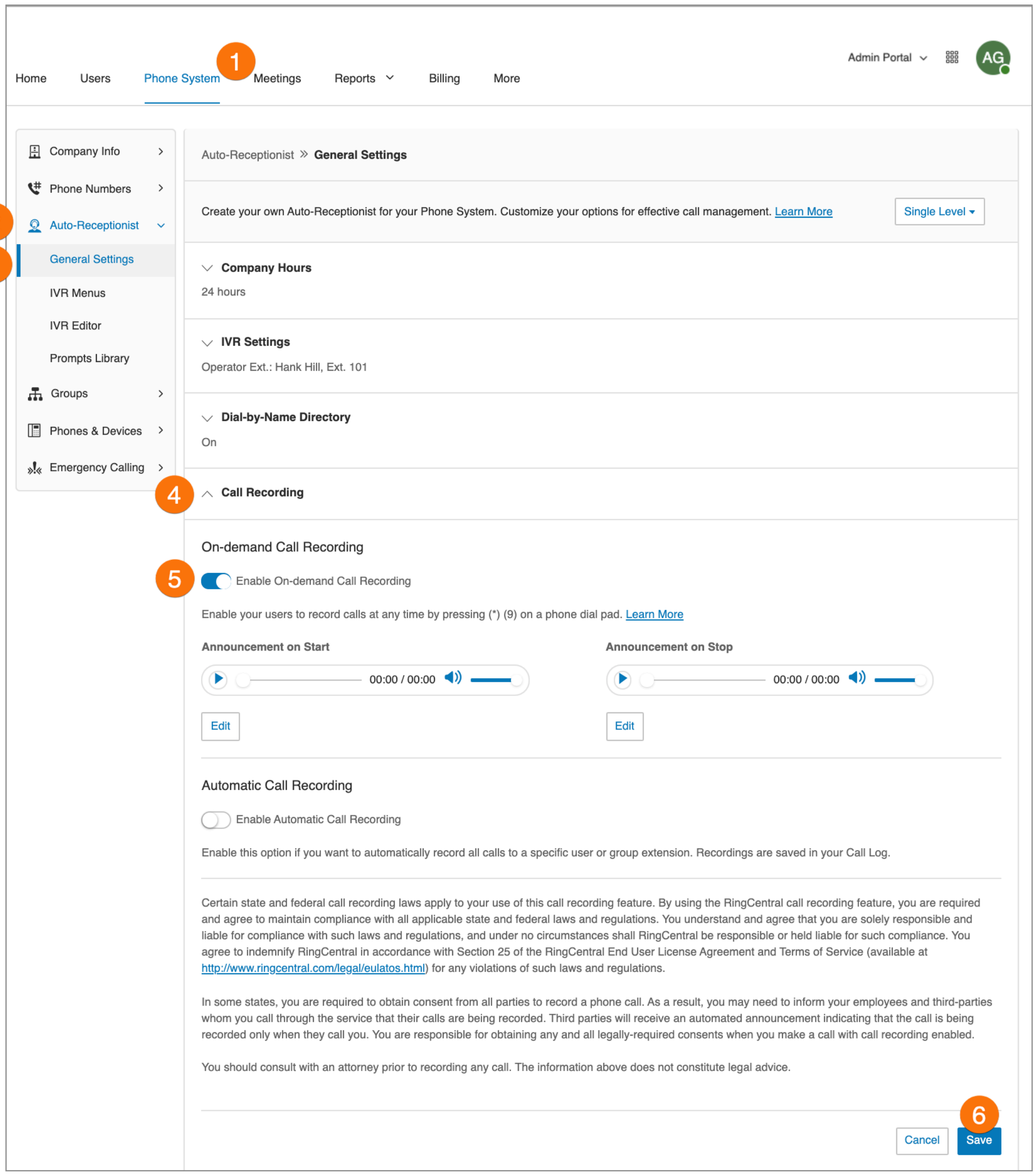
IVR Editor
Prompts Library
Groups
Phones & Devices
Emergency Calling
Auto-Receptionist » General Settings
Create your own Auto-Receptionist for your Phone System. Customize your options for effective call management. Learn More
Single Level
Company Hours
24 hours
IVR Settings
Operator Ext.: Hank Hill, 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
00:00 / 00:00
Edit
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."
Cancel
Done
Announcement on Stop
Set Greeting
Default
View In
English (U.S.)
"This call has been recorded."
Cancel
Done
Cancel
Save
1
2
3
4
5
6
7

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**.



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.

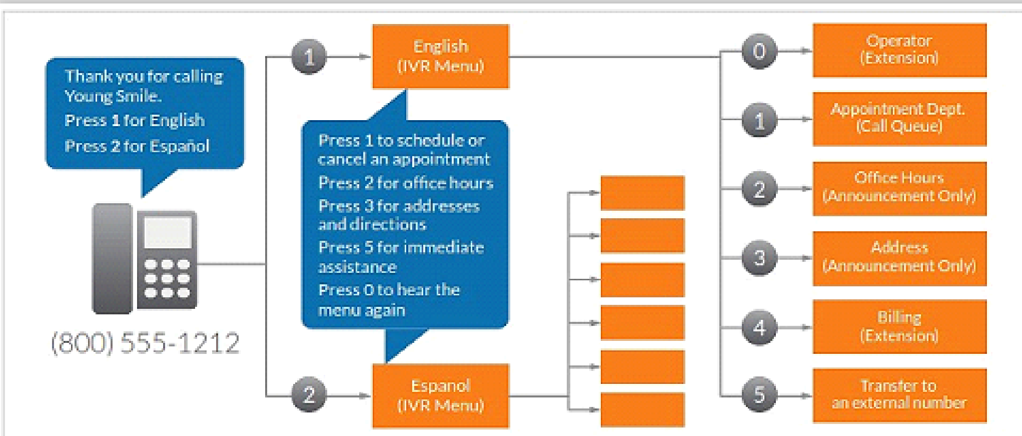
Multi-level IVR options

Single-location IVR example

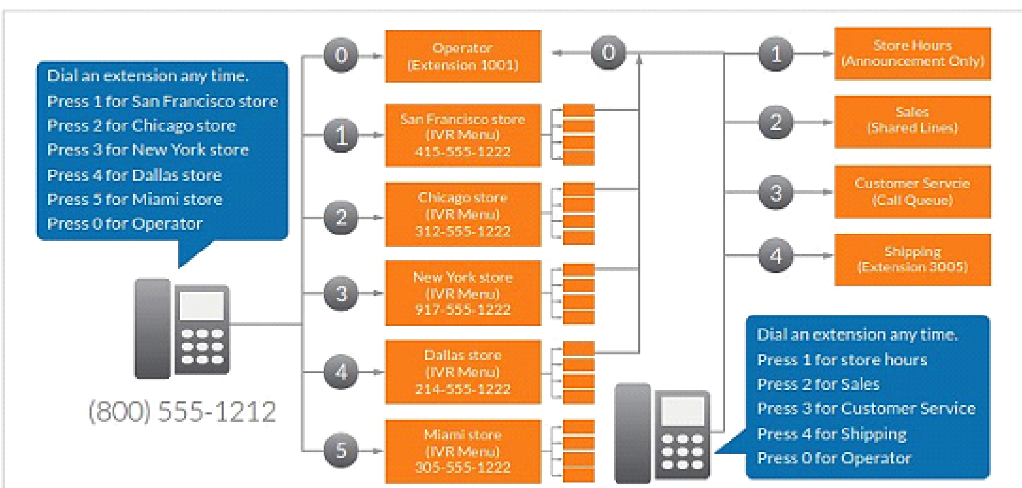
A local dentist office provides services to both English- and Spanish-speaking customers. The dental office IT Manager configures the phone routing system with identical prompts in two languages.

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.



Multi-Level IVR, single location use case: bilingual dentist office



Multi-Level IVR, multiple location use case: nationwide furniture retailer

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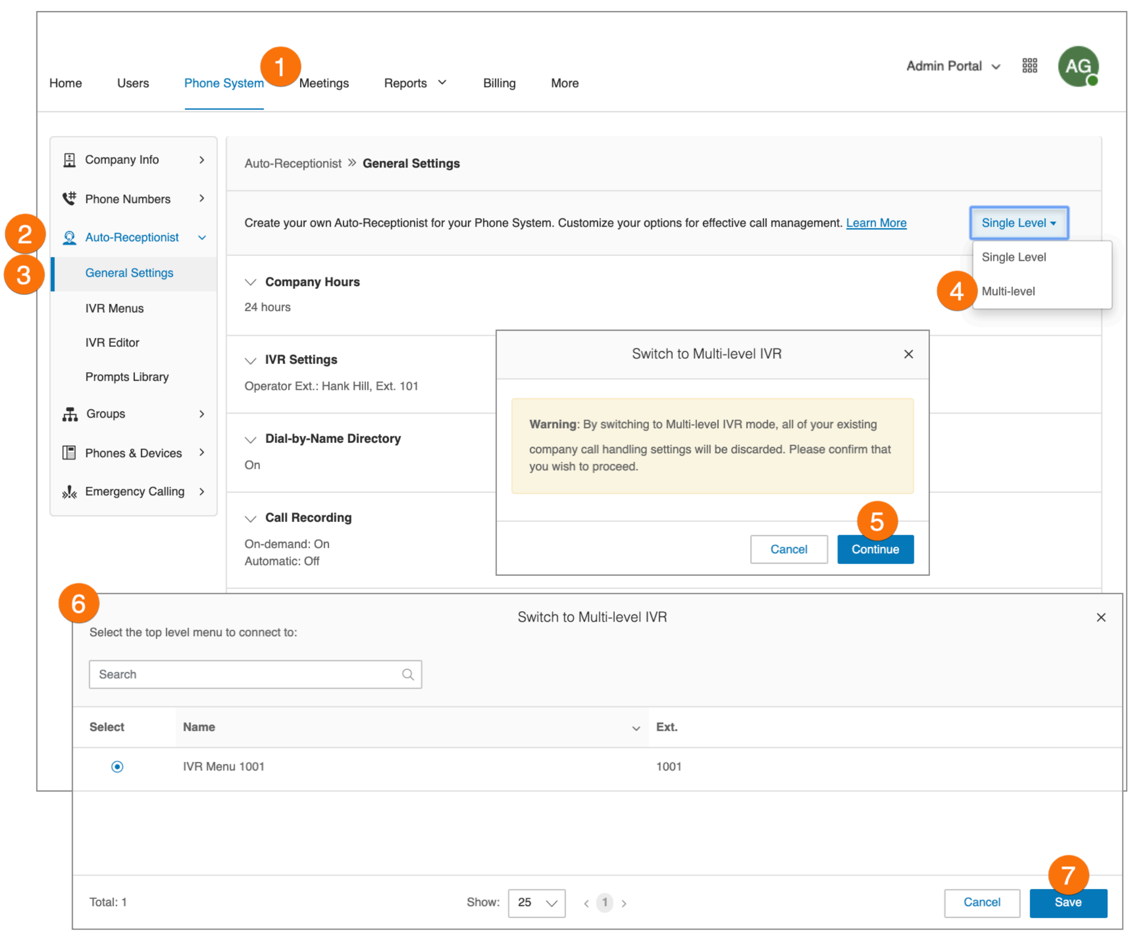
Switching to multi-level IVR mode

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.



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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**.

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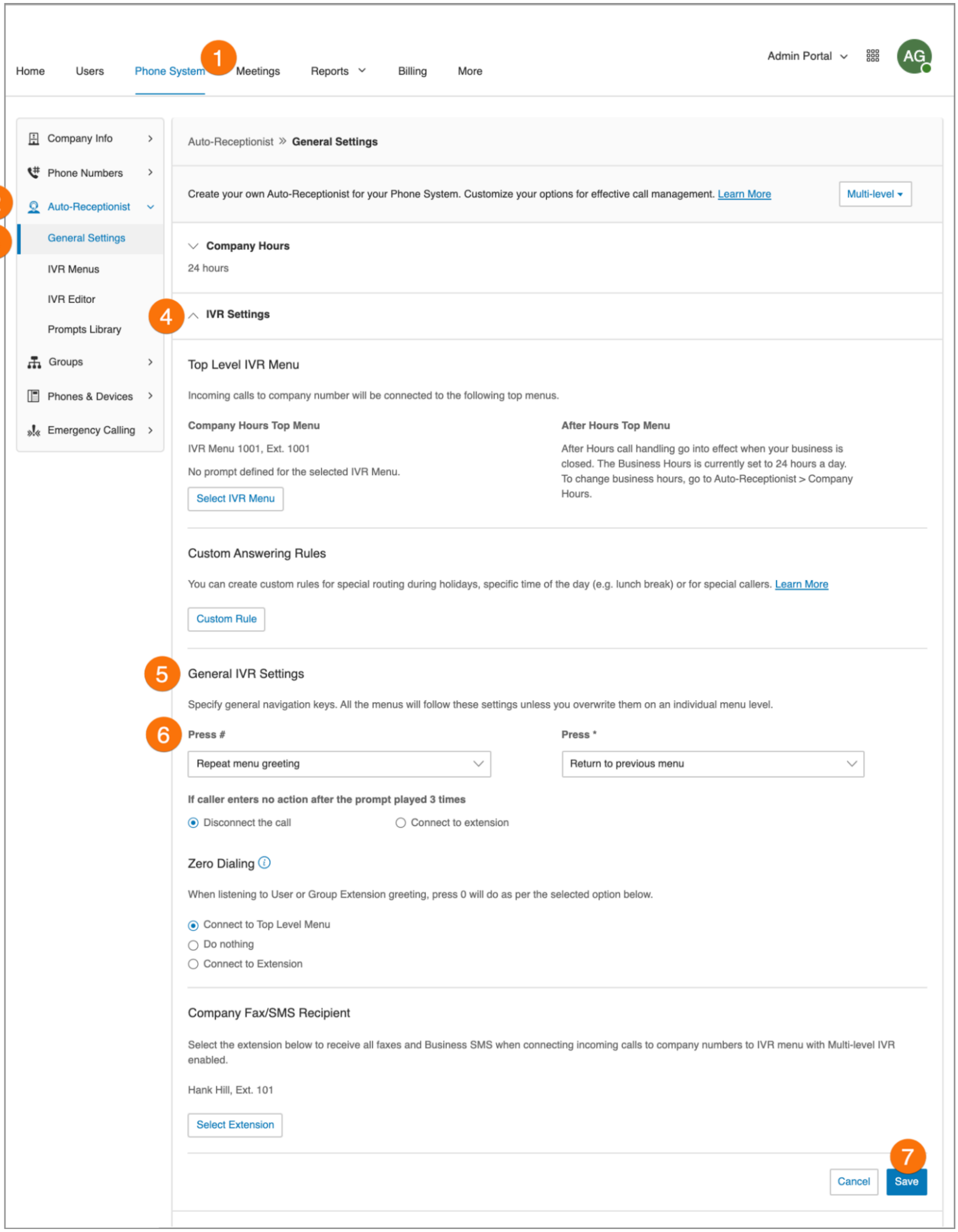

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IVR Editor

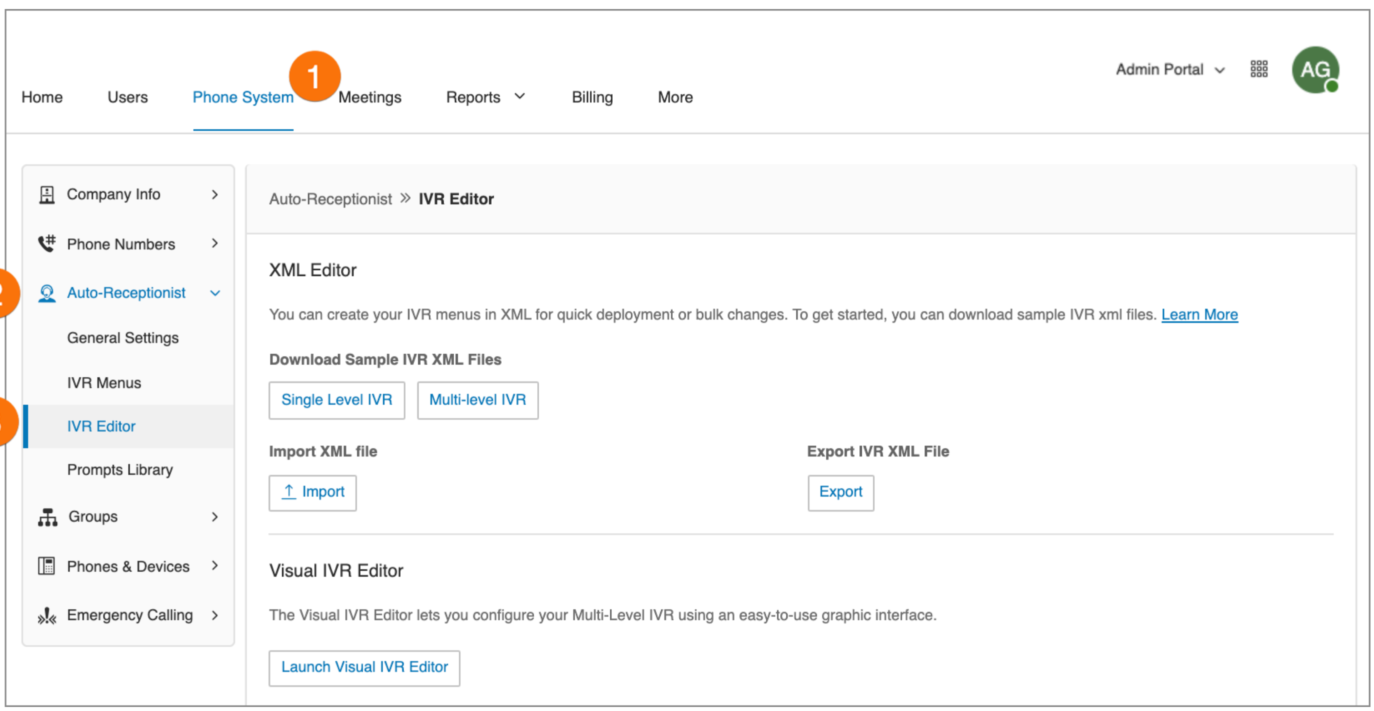
RingCentral provides additional IVR tools to help you create and manage your IVR Menus.
Auto-Receptionist consists of three parts that help you configure your IVR: IVR Menus, IVR Editor, Prompts Library. Use the IVR tool to:

- 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**.



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IVR menus

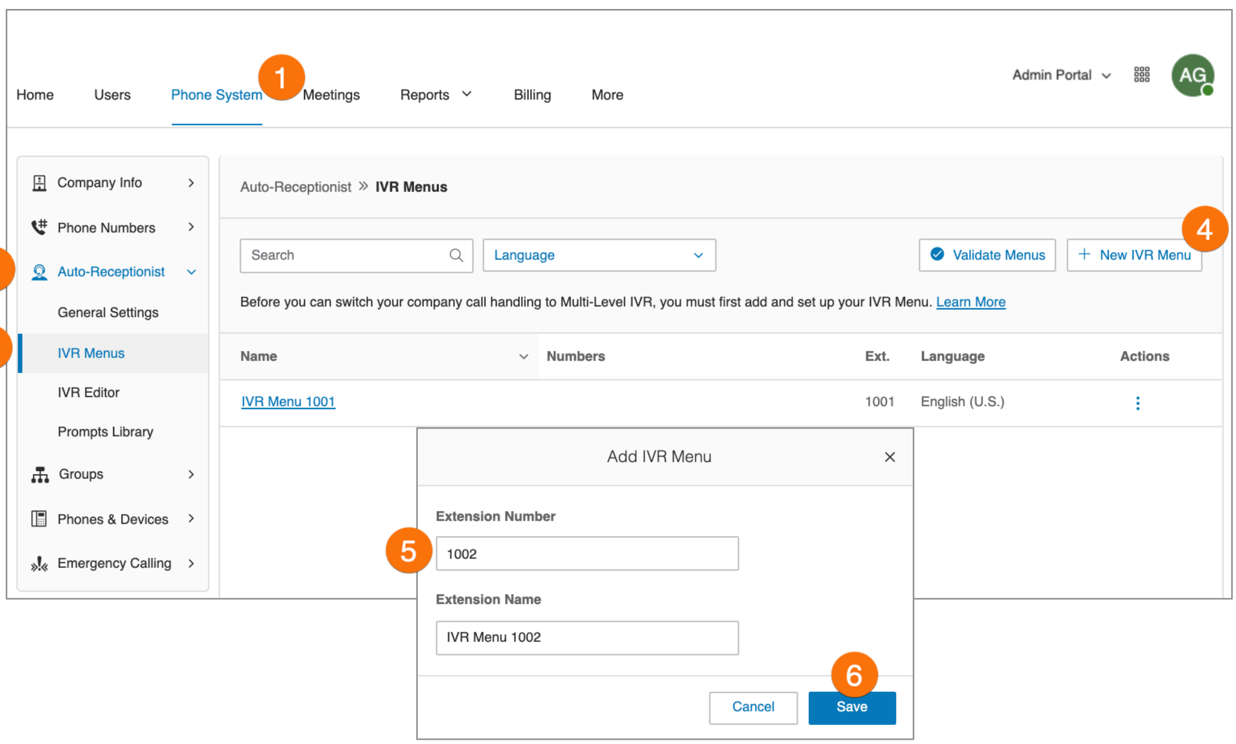
RingCentral offers various tools to help manage and create IVR (interactive voice response) menus. Administrators can add new IVR menus as shown in the following instructions, use the Visual IVR Editor, or import an XML file.

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 RingEX Premium and Ultimate users only.



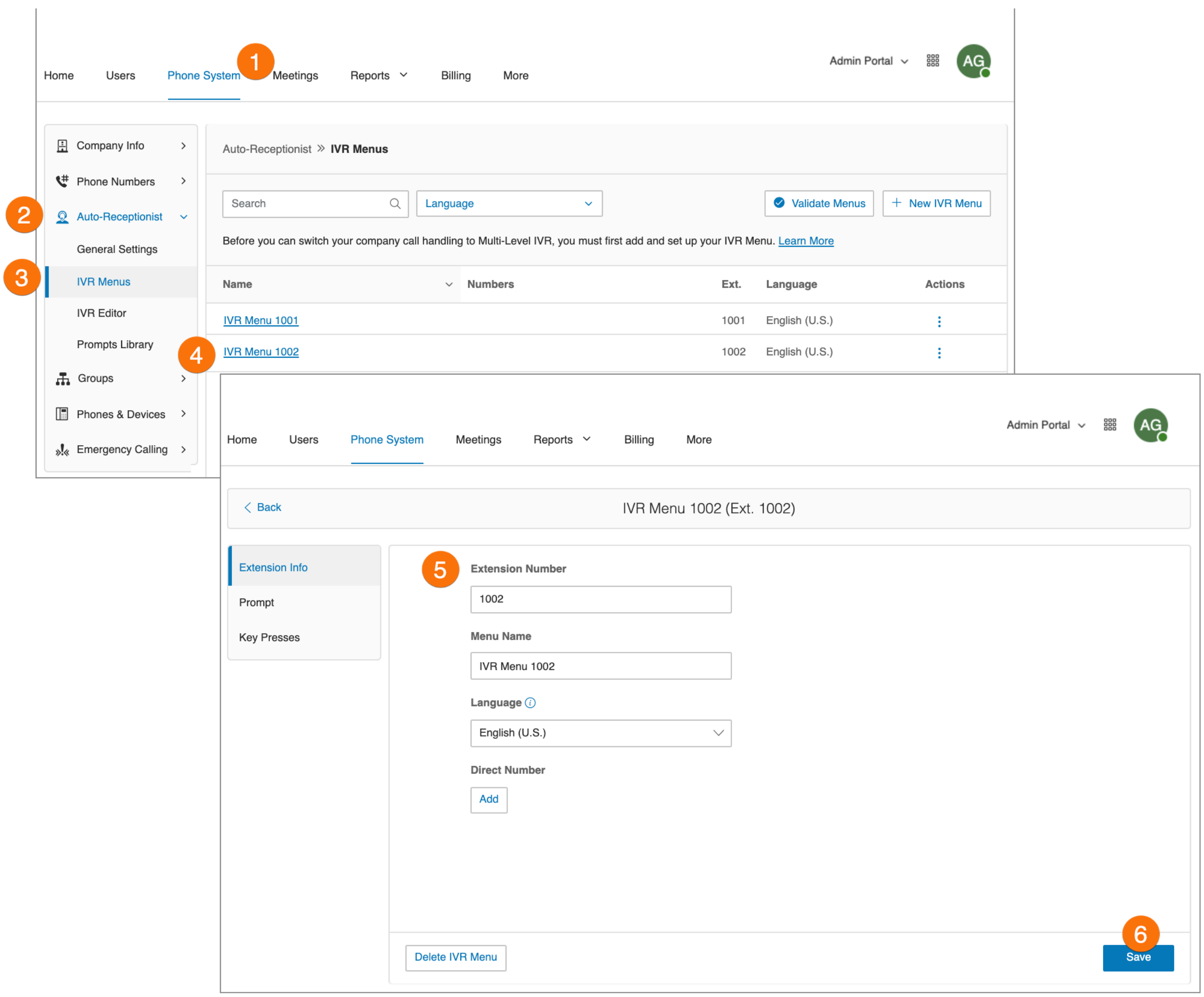
Configuring an IVR menu

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**.



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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**.

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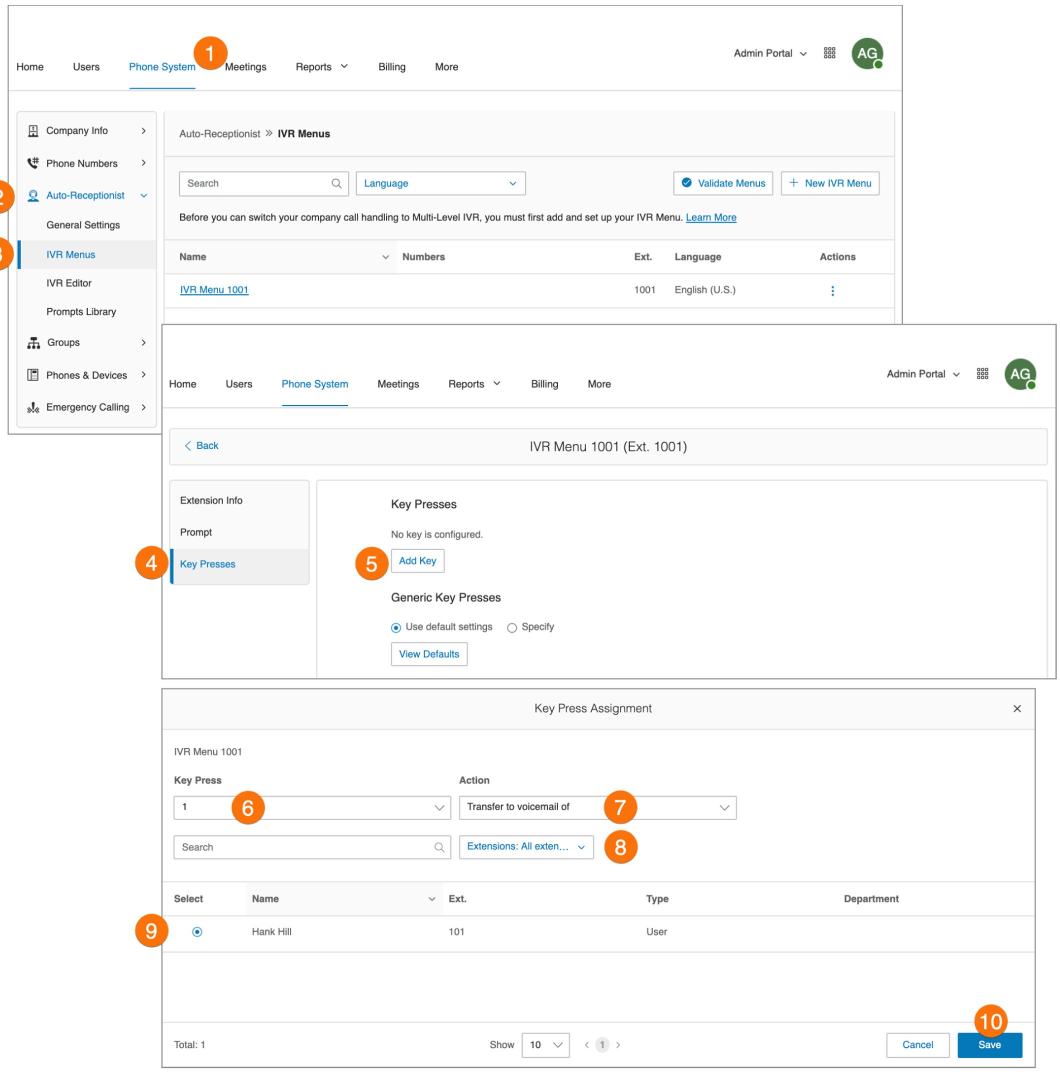
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Groups
Phones & Devices
Emergency Calling
Auto-Receptionist » IVR Menus
Search
Language
Validate Menus
New IVR Menu
Before you can switch your company call handling to Multi-Level IVR, you must first add and set up your IVR Menu. Learn More
Name
Numbers
Ext.
Language
Actions
IVR Menu 1001
1001
English (U.S.)
Back
IVR Menu 1001 (Ext. 1001)
Extension Info
Prompt
Key Presses
Key Presses
No key is configured.
Add Key
Generic Key Presses
Use default settings
Specify
View Defaults
Key Press Assignment
IVR Menu 1001
Key Press
Action
1
Transfer to voicemail of
Search
Extensions: All exten...
Select
Name
Ext.
Type
Department
Hank Hill
101
User
Total: 1
Show
10
Cancel
Save
1
2
3
4
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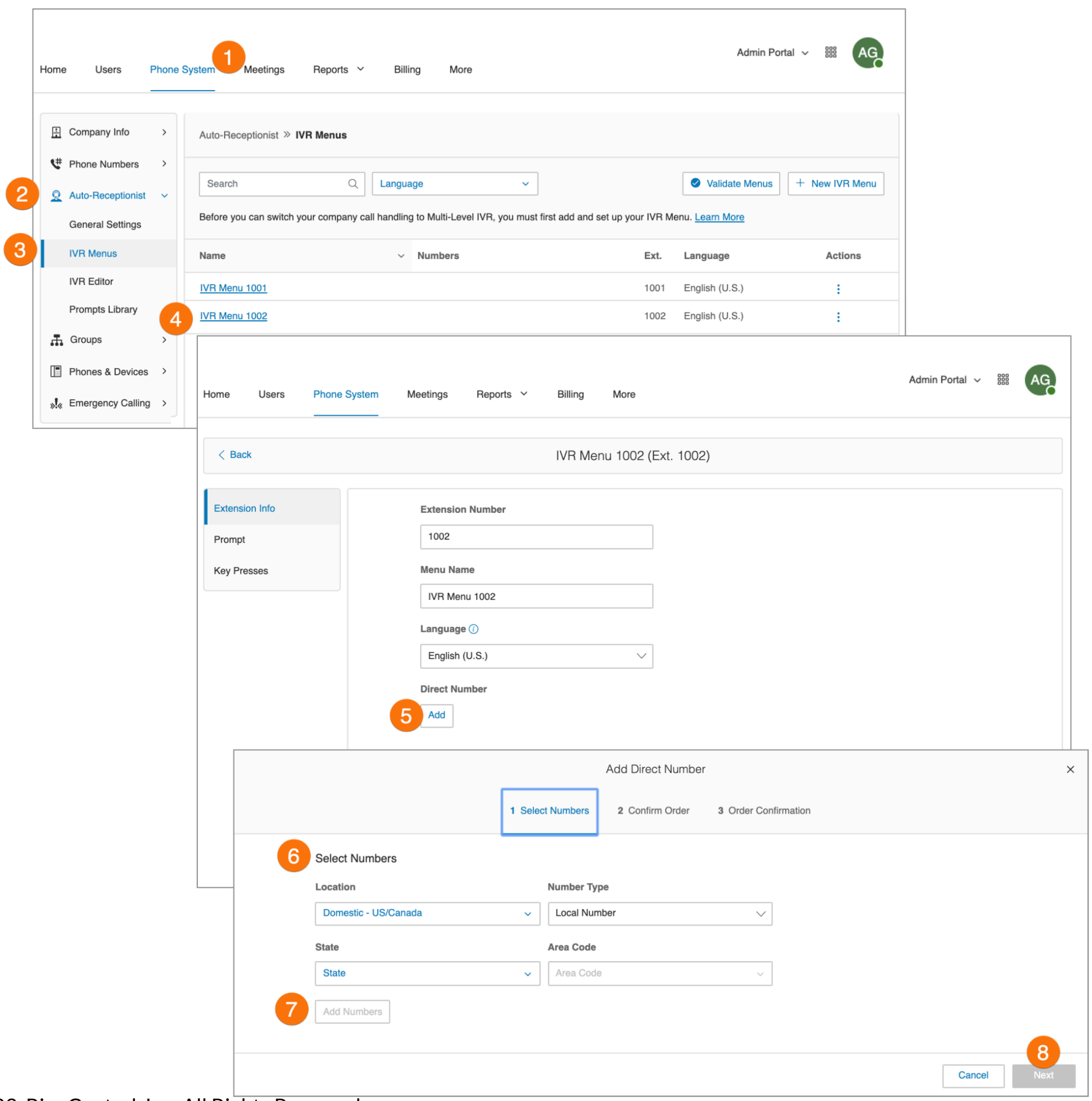
8
9
10

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.



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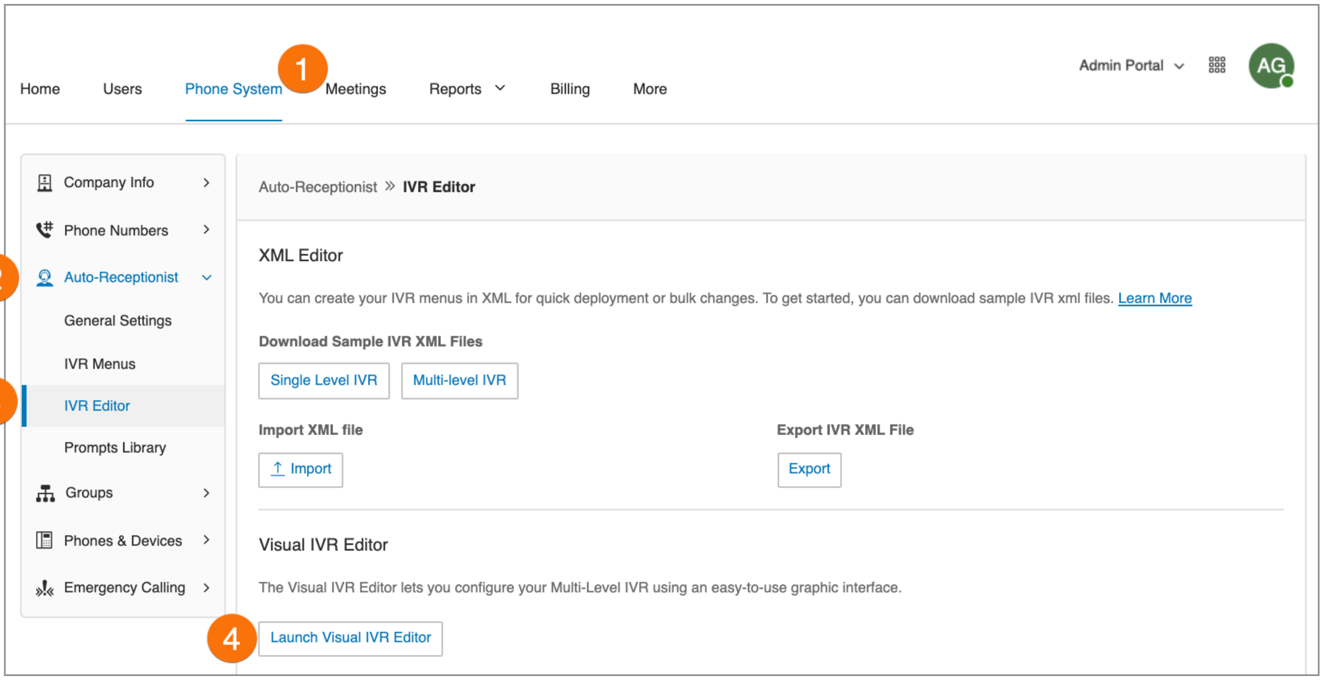
Visual IVR Editor

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.

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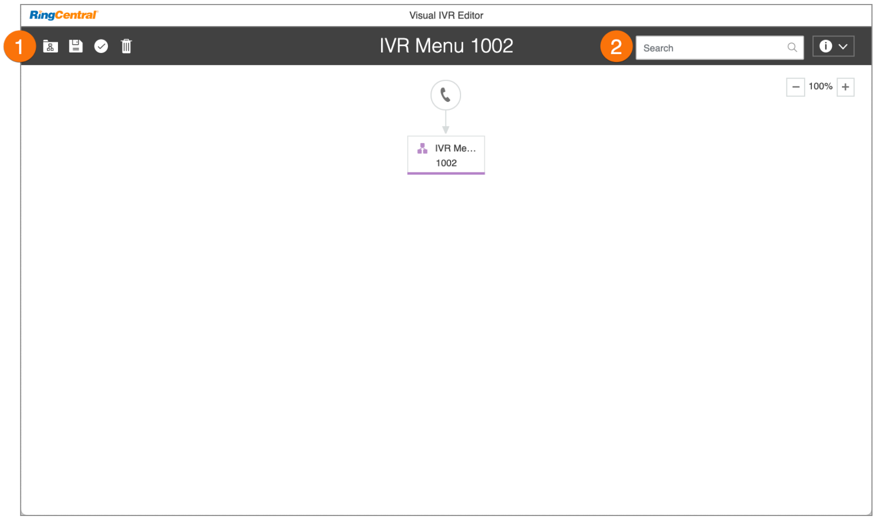
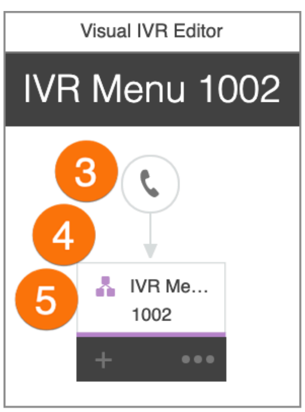
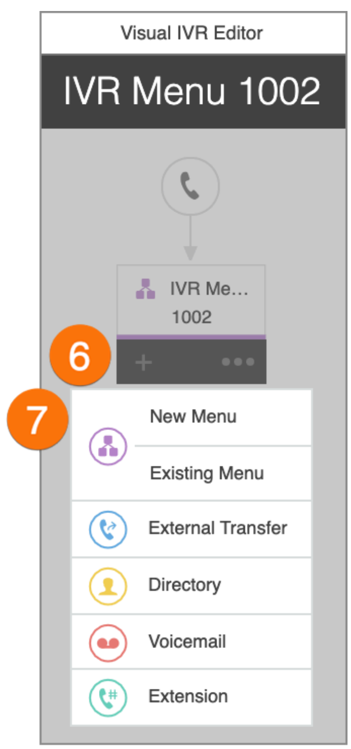


3. Click the **Phone** icon to start a new tree.
4. Your new tree will be automatically assigned a name and extension number.
5. Click the name or extension number to edit the text field and enter your preferred name and extension. Press enter when you are finished and the title will change automatically.
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.





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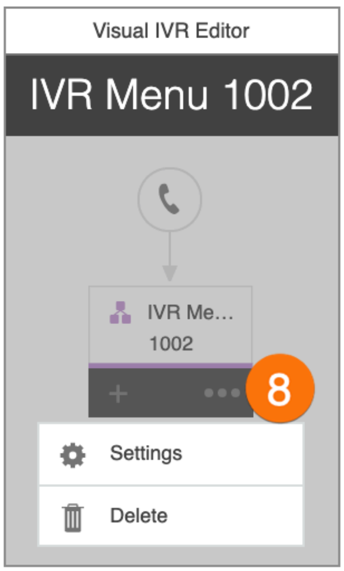
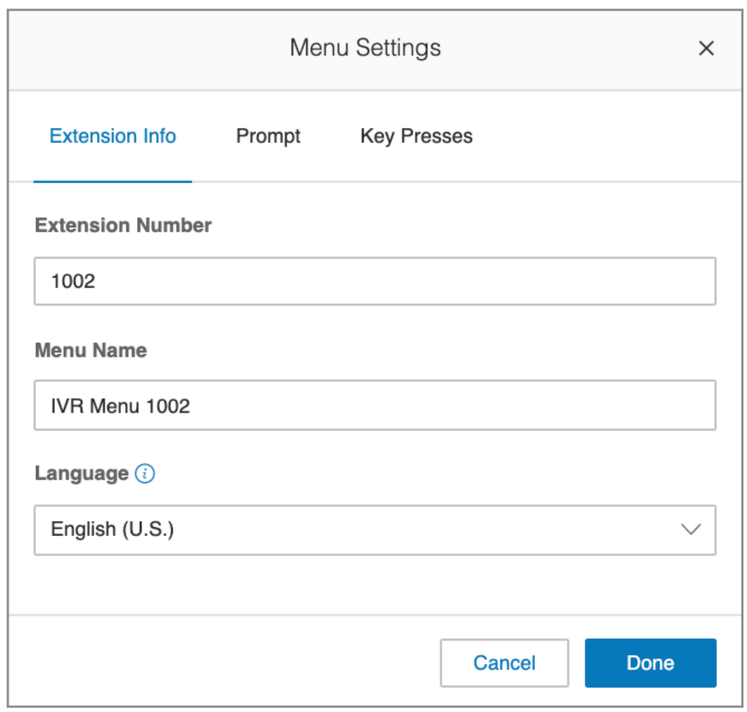
8. As you add sub-items to your tree, they will appear in the Visual IVR Editor. Once you have added your items to your menu, hover over an item to edit it and see more options. For some items you will see a “+” and “…” and other items will only have the trash can icon.
9. Click the IVR name and extension 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.





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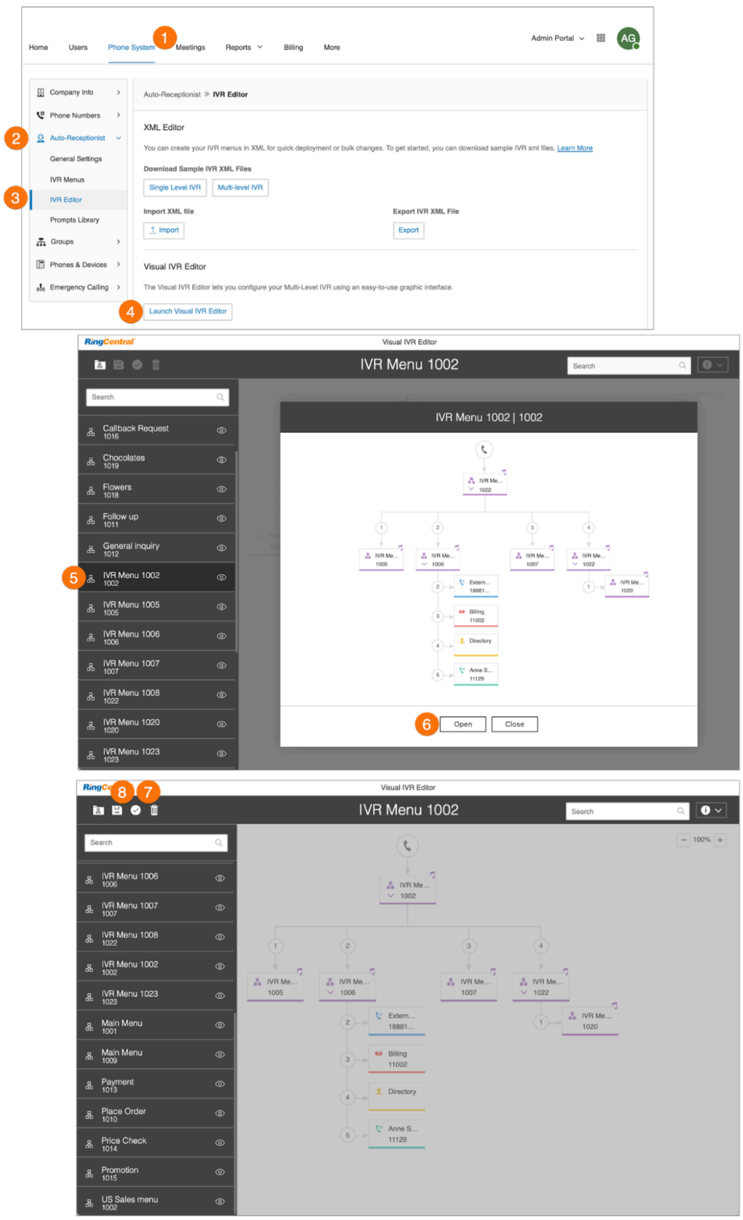
Editing an existing IVR menu with the visual IVR editor

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.



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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.

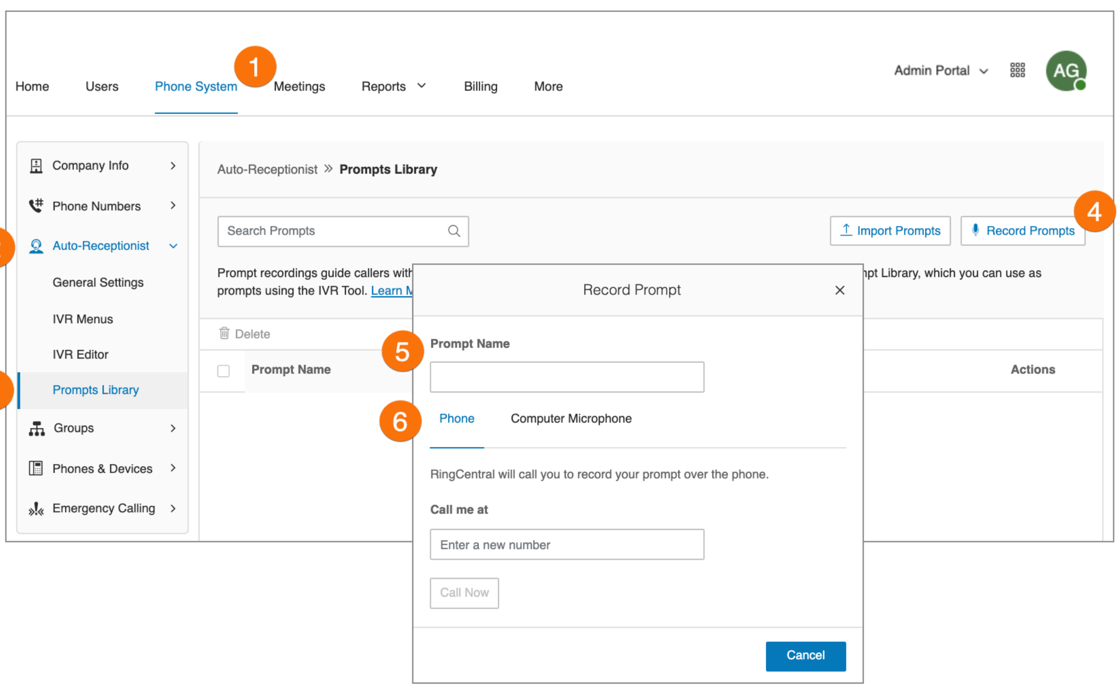
There are two prompt modes: audio and text-to-speech.

- 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

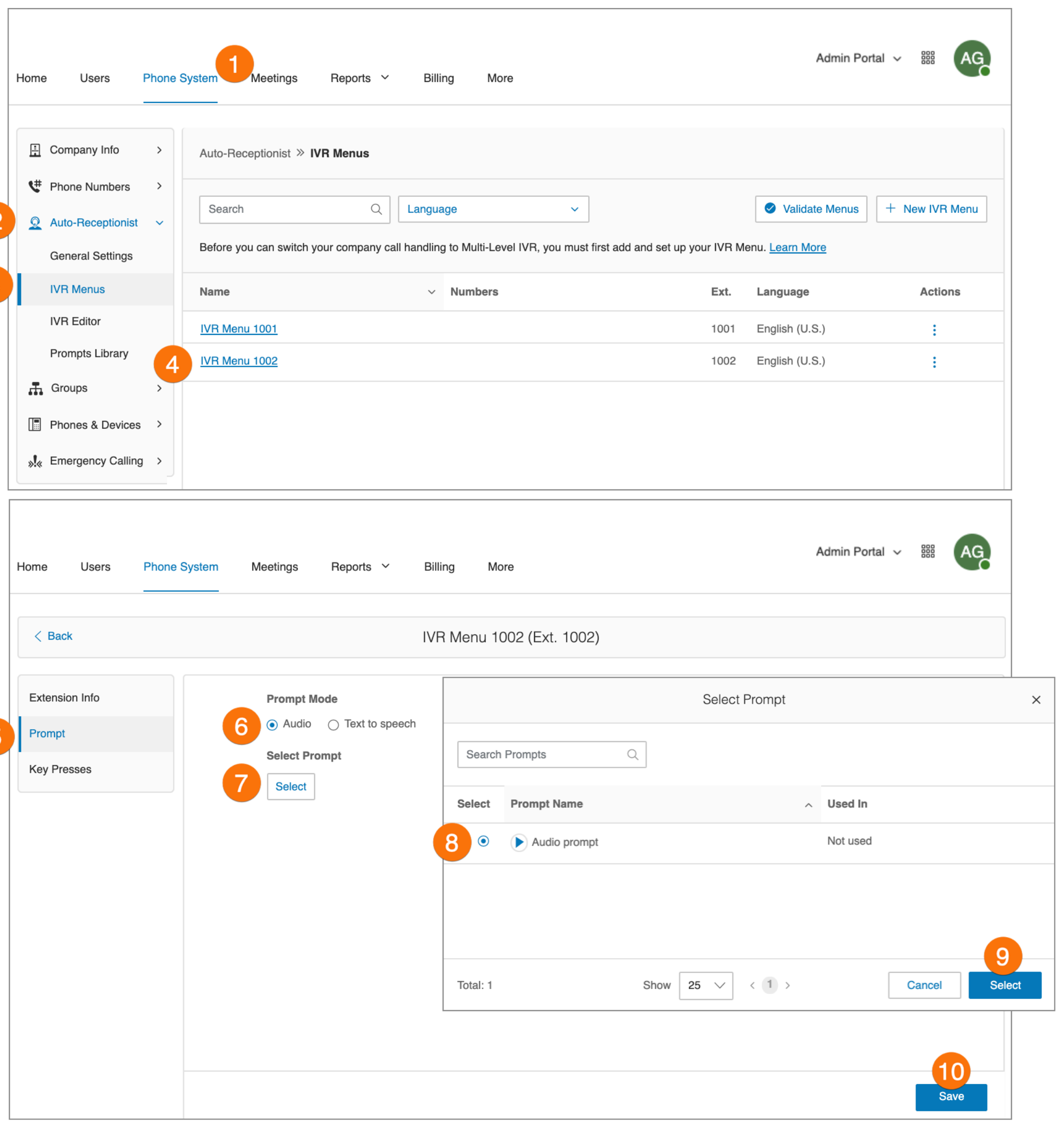
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**. The **Record Prompt** window will appear.
5. Enter a name for your prompt in the **Prompt Name** field.
6. Select one of these prompt methods and follow 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.



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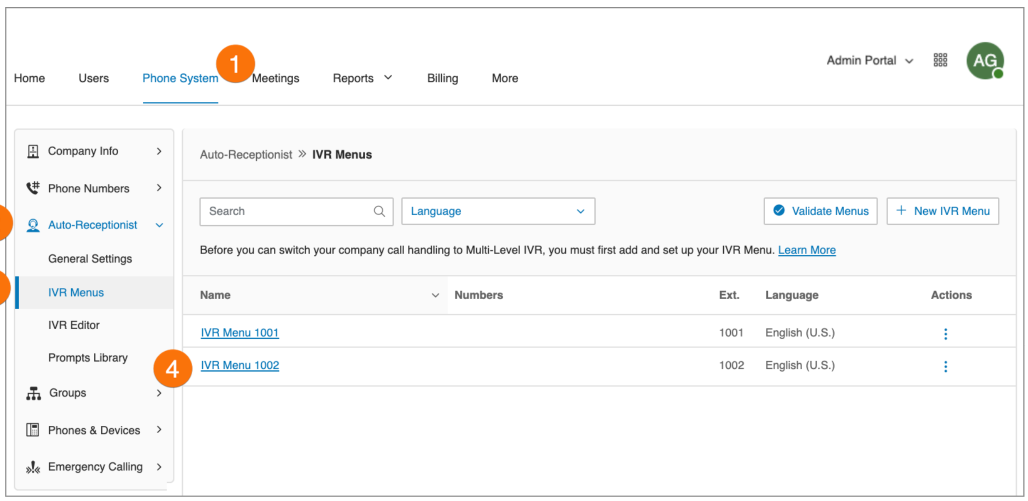
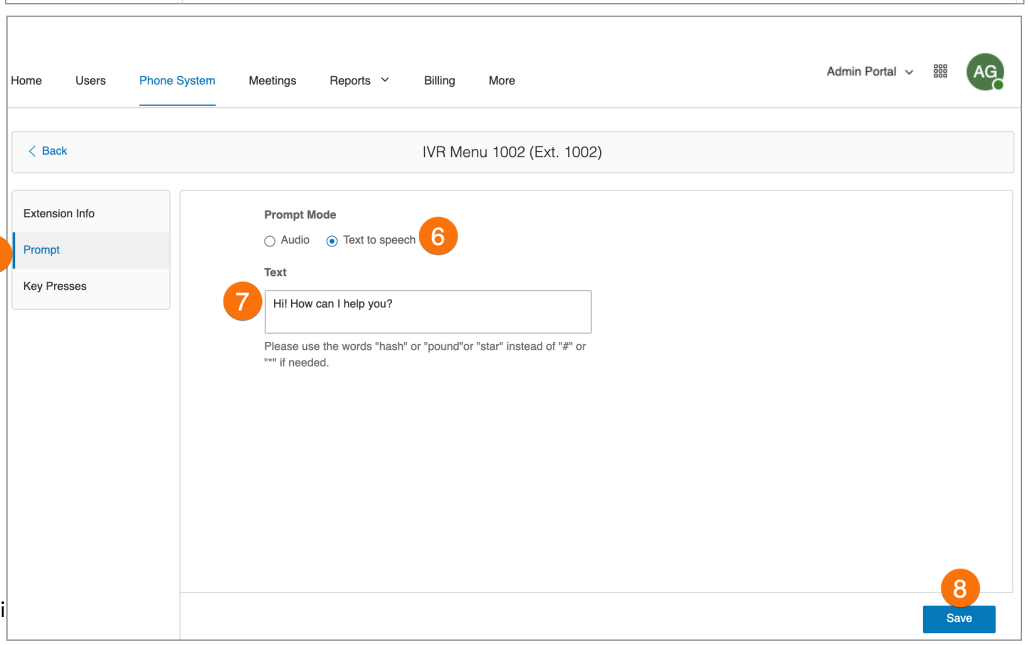
Selecting text-to-speech prompt mode

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**.





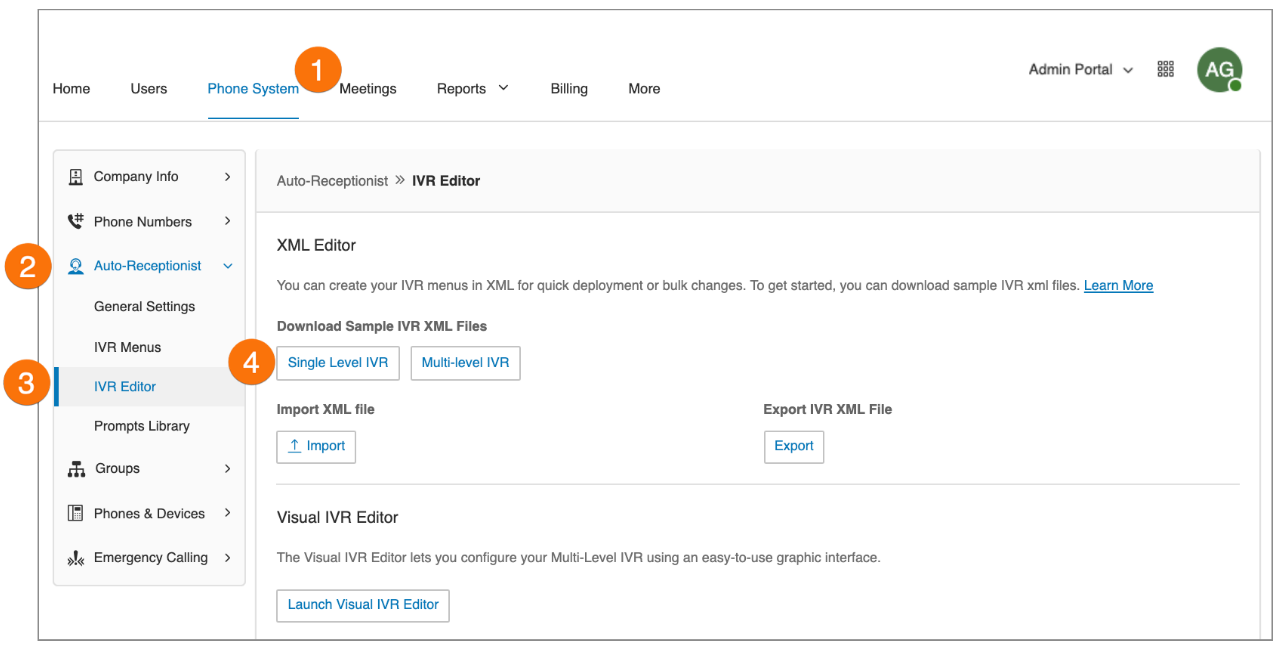
Importing or exporting XML files

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

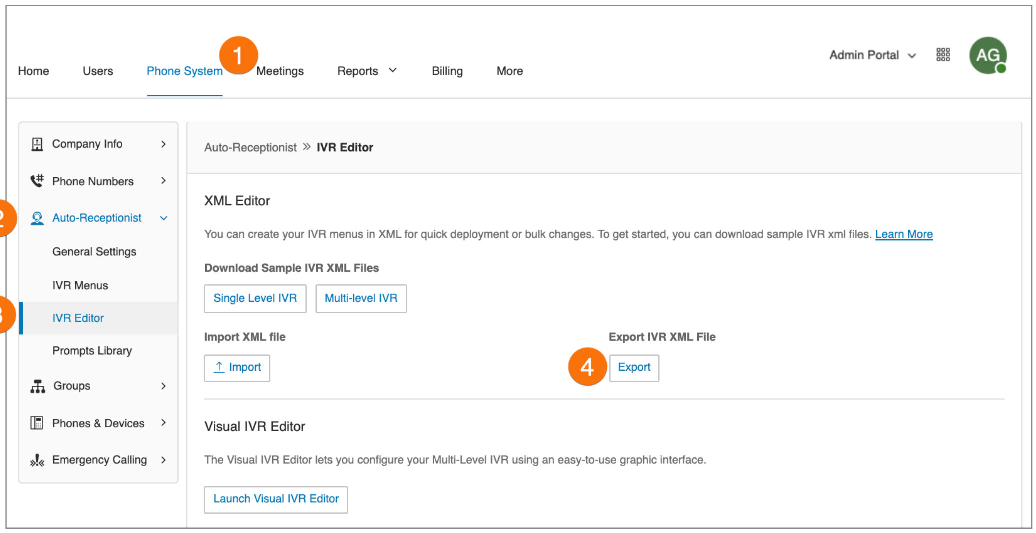
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor.** The XML Editor displays.
4. Under **Download Sample IVR XML Files**,
   - Click **Single Level IVR**.
     OR
   - **Click Multi-level IVR**.

The sample XML file is downloaded to your browser.



Exporting an XML file

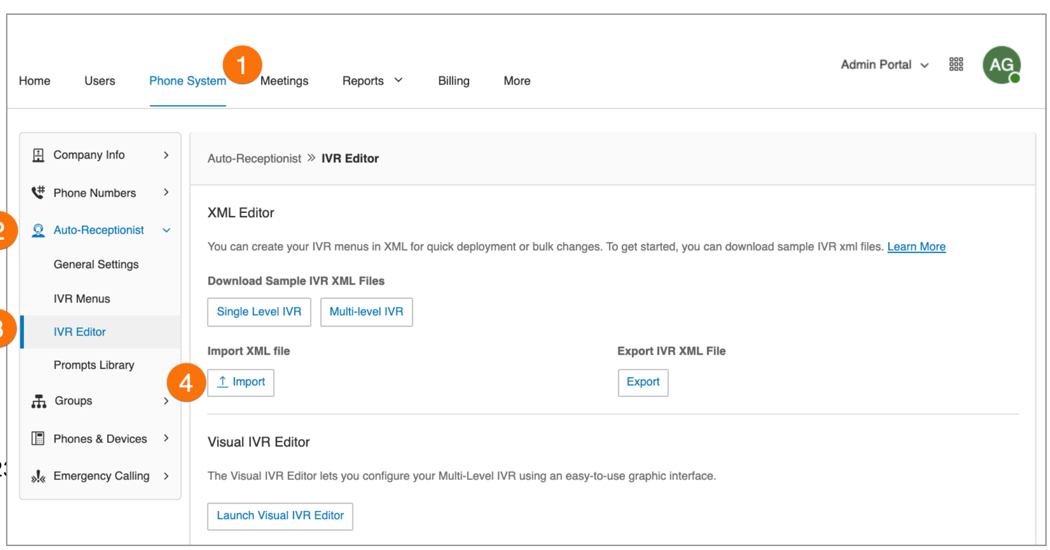
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**. The **XML Editor** displays.
4. Under **Export IVR XML File**, click **Export**. The sample XML file is exported to your browser.



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.



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Recording greetings and messages

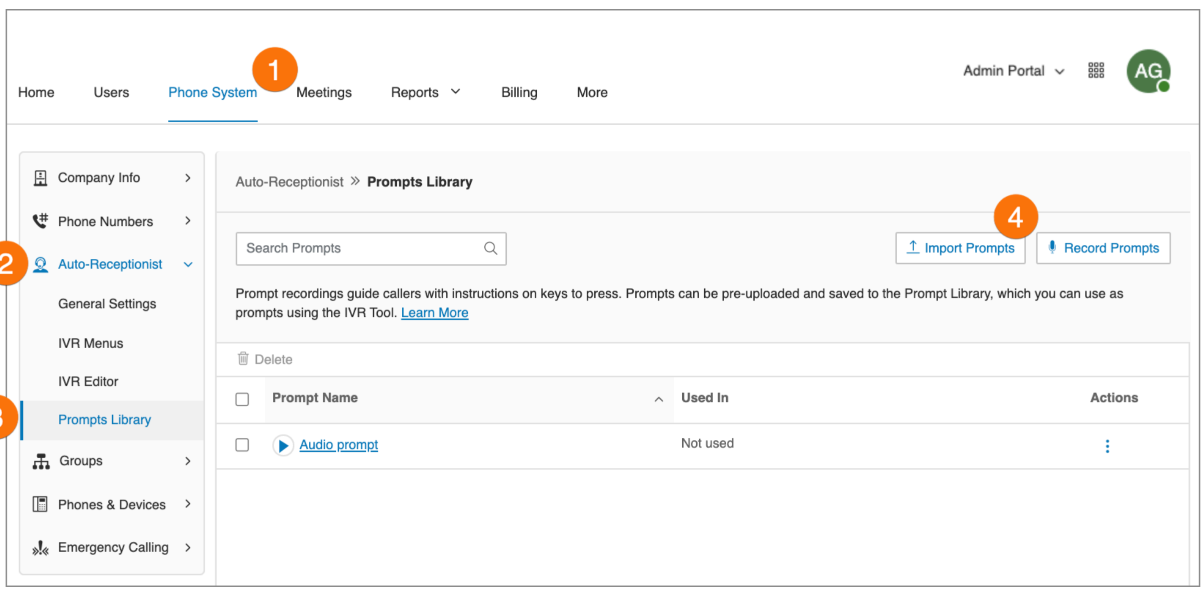
Several tasks require admins to record messages or greetings for your RingCentral system. These steps explain how to do the following:

- 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**.



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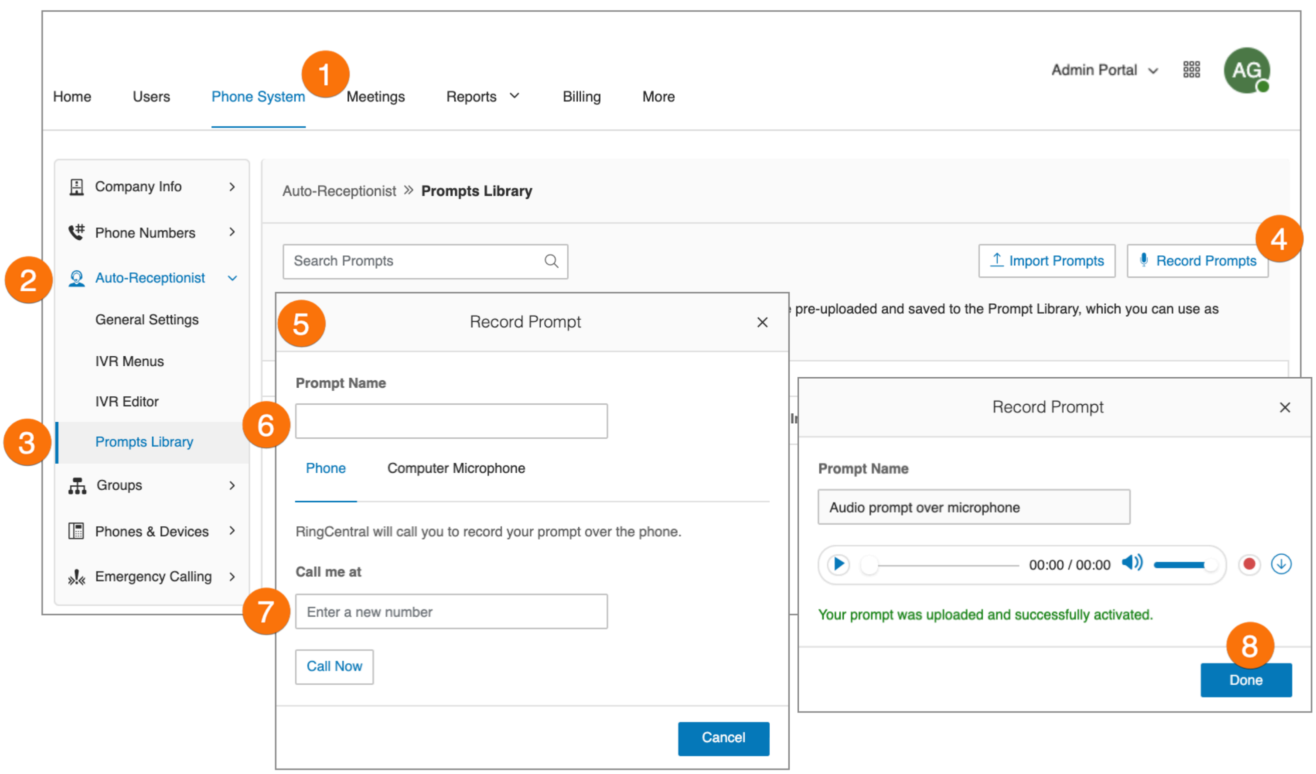
Recording a prompt over the phone

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.

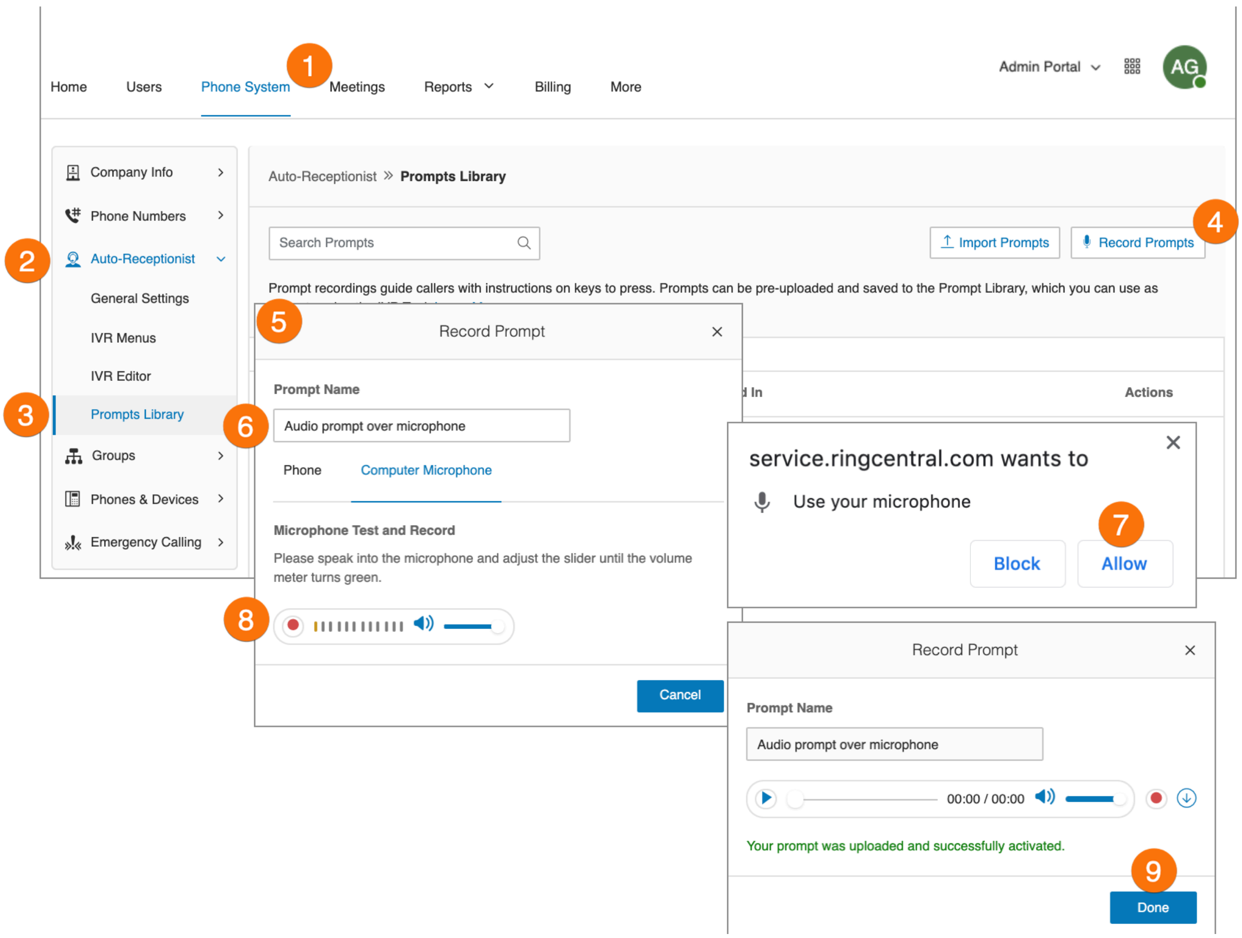
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. The **Record Prompt** window appears.
6. Enter a name in the text field next to **Prompt Name**.
7. Click **Phone**.
    - In the **Call me at** field,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

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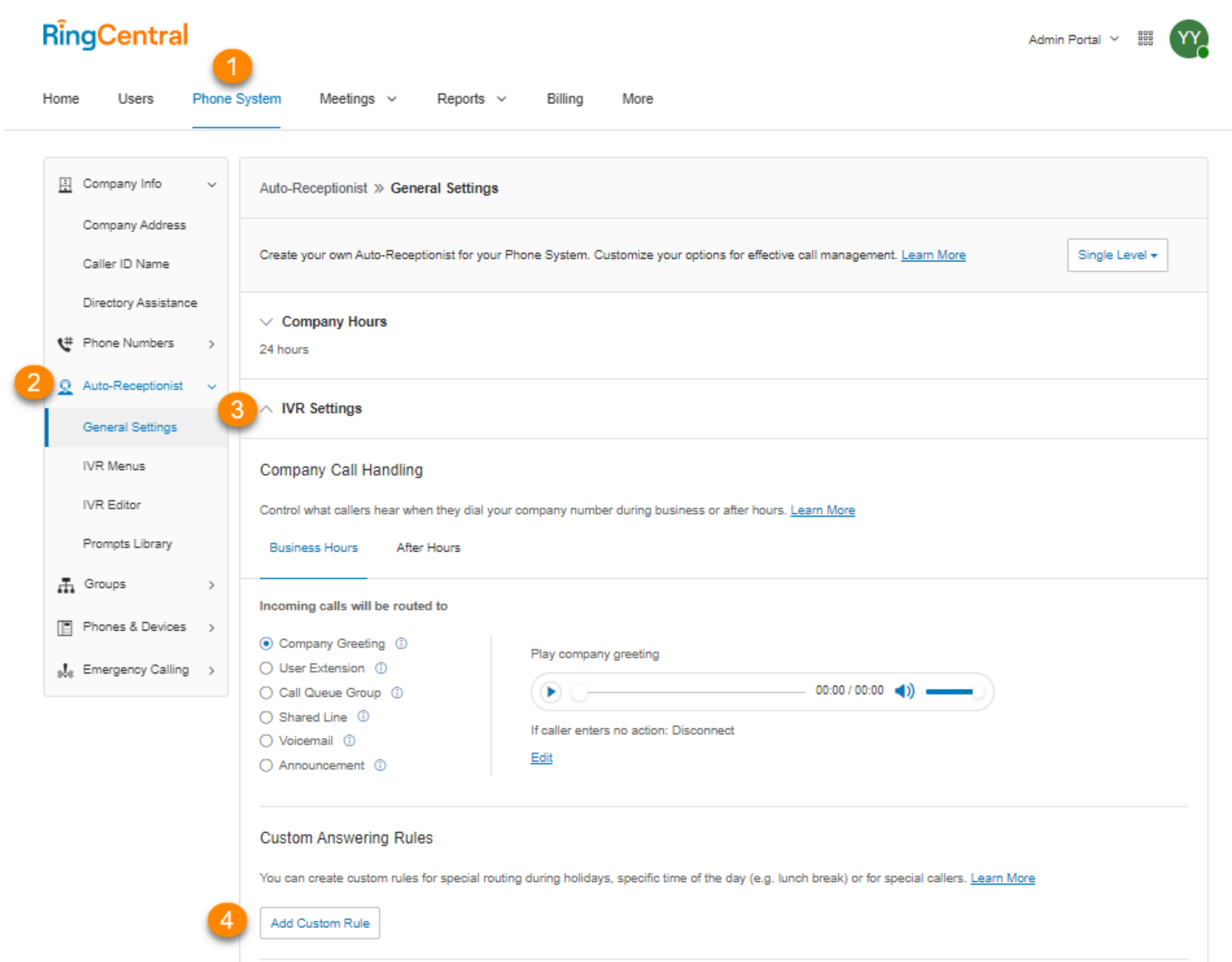

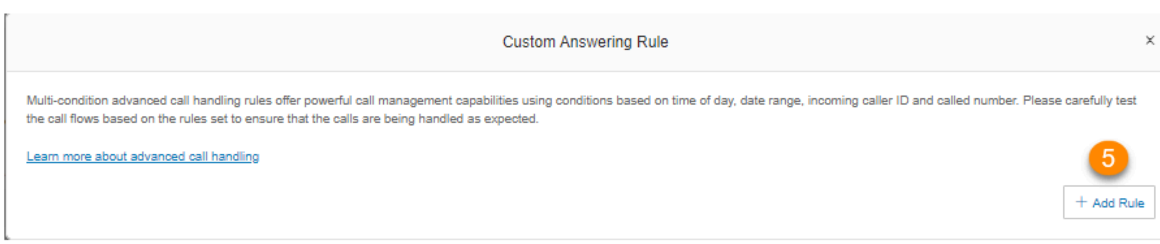

6. Enter Your Rule Name, then click Next.
7. Define the call conditions, then click Next.

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

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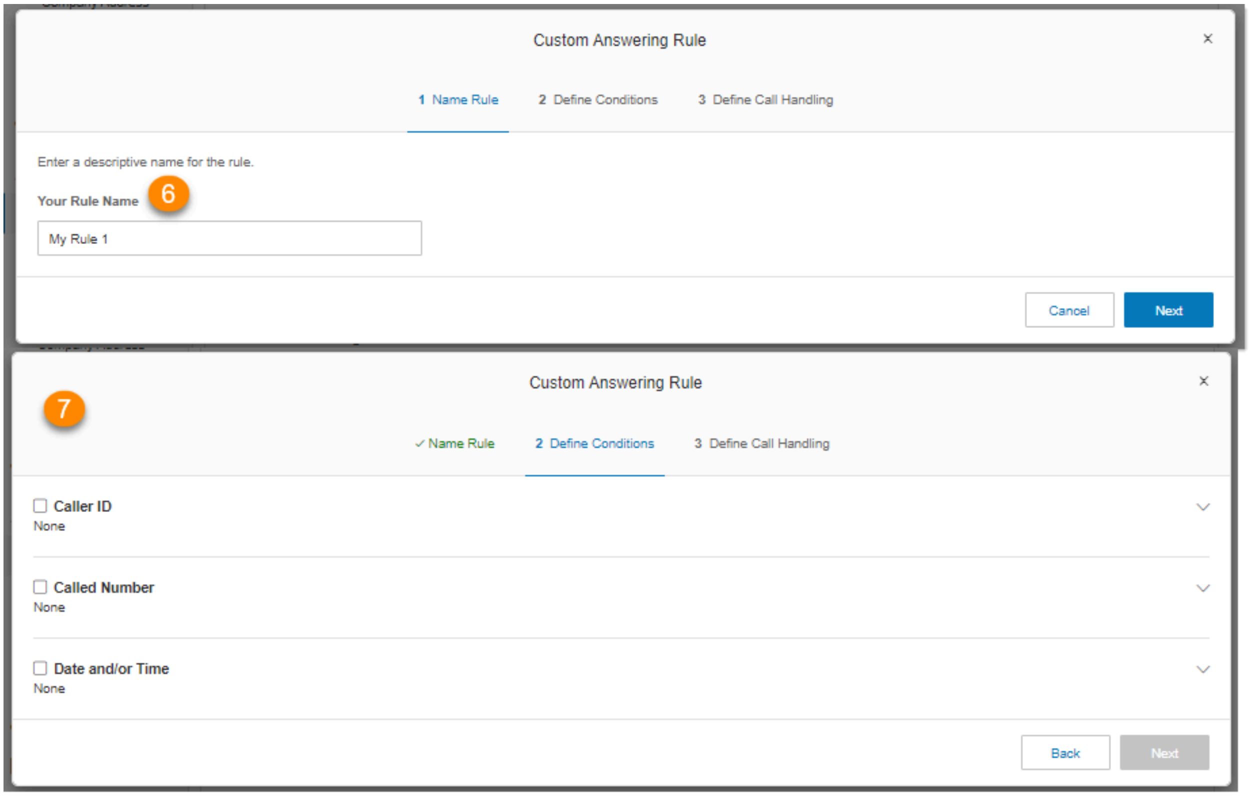

Custom answering rule conditions

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**.

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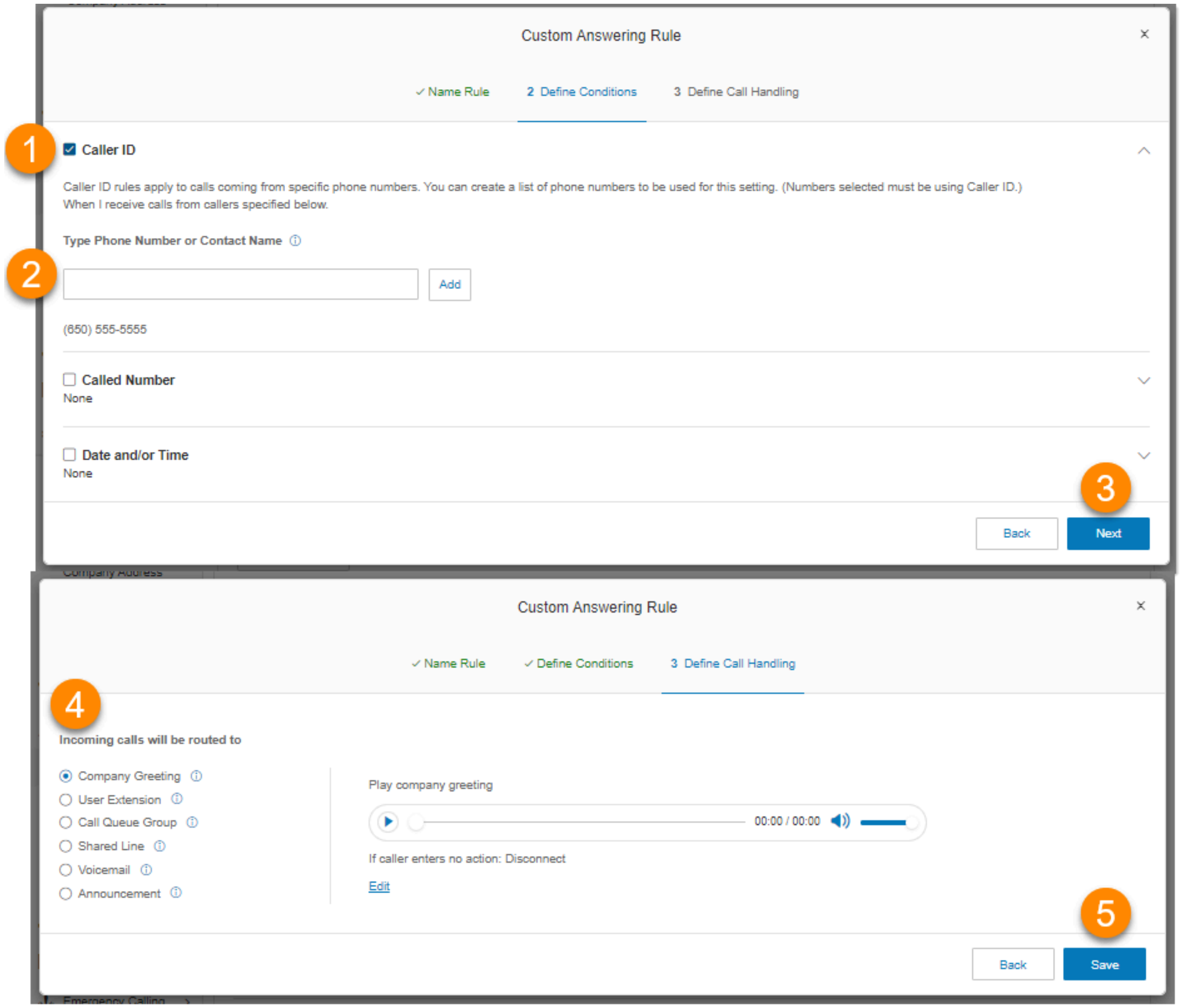

Custom rule condition - Called Number

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.

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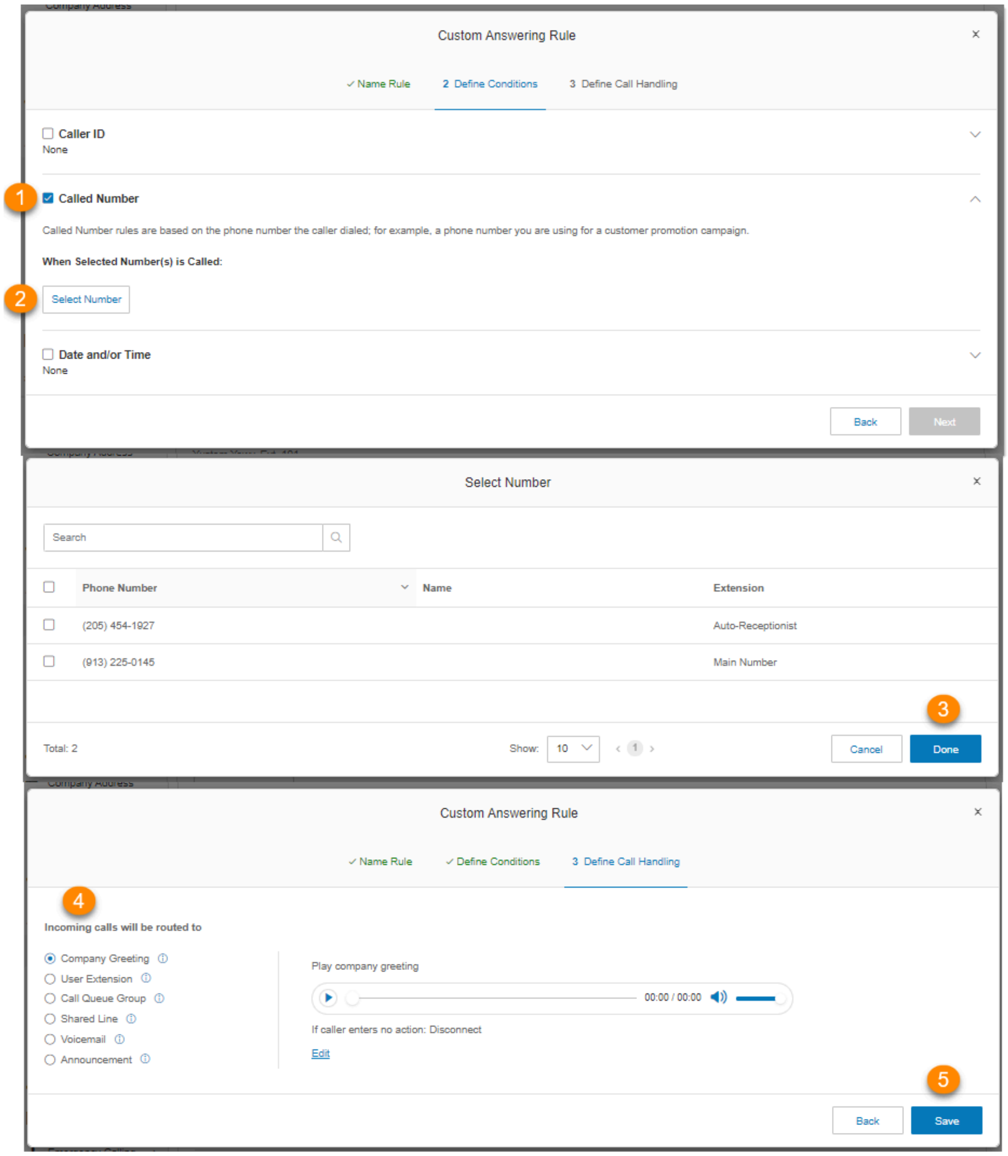
5. Click **Save.**



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.**

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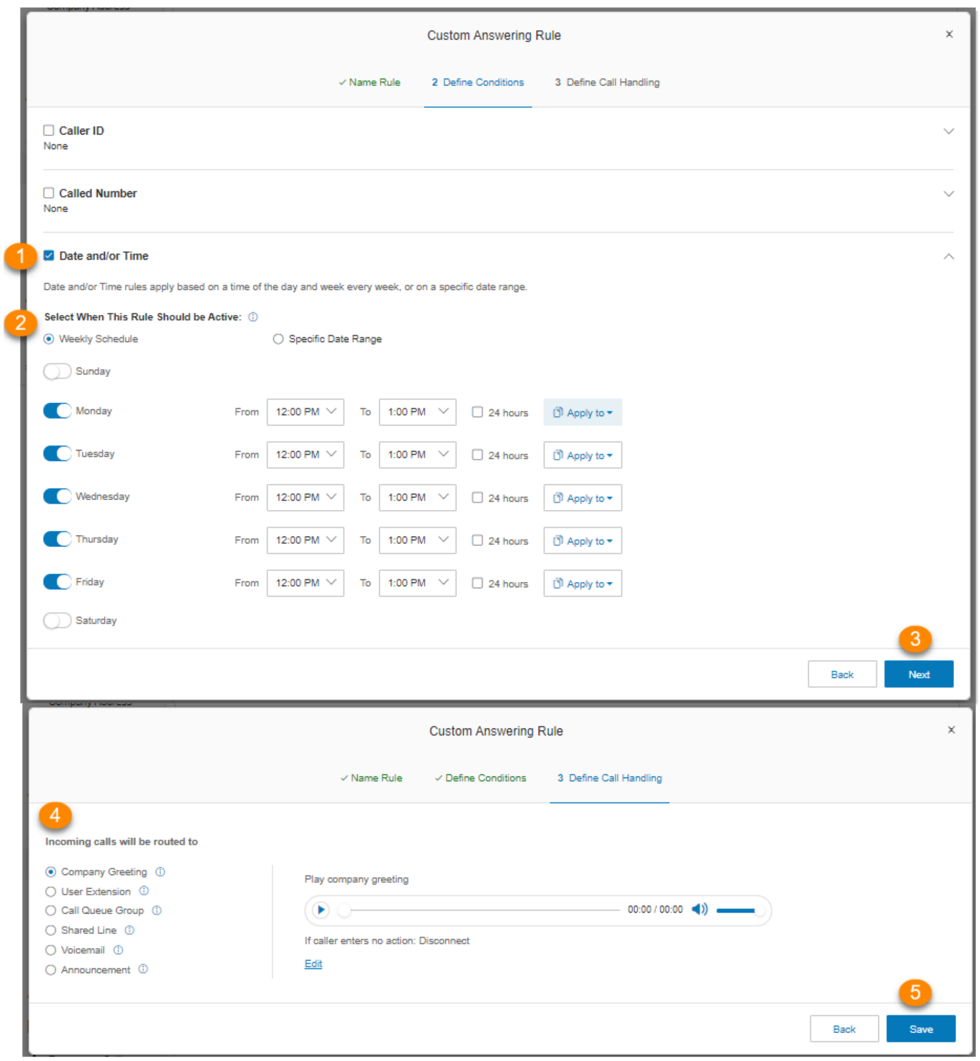
4. Define the call handling action to be performed when the conditions are met. Call handling options include Company Greeting, User Extension, Call Queue Group, Shared Line, Voicemail, and Announcement.
5. Click **Save**.



Custom answering rule 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 RingEX 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**.

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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 RingEX 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.

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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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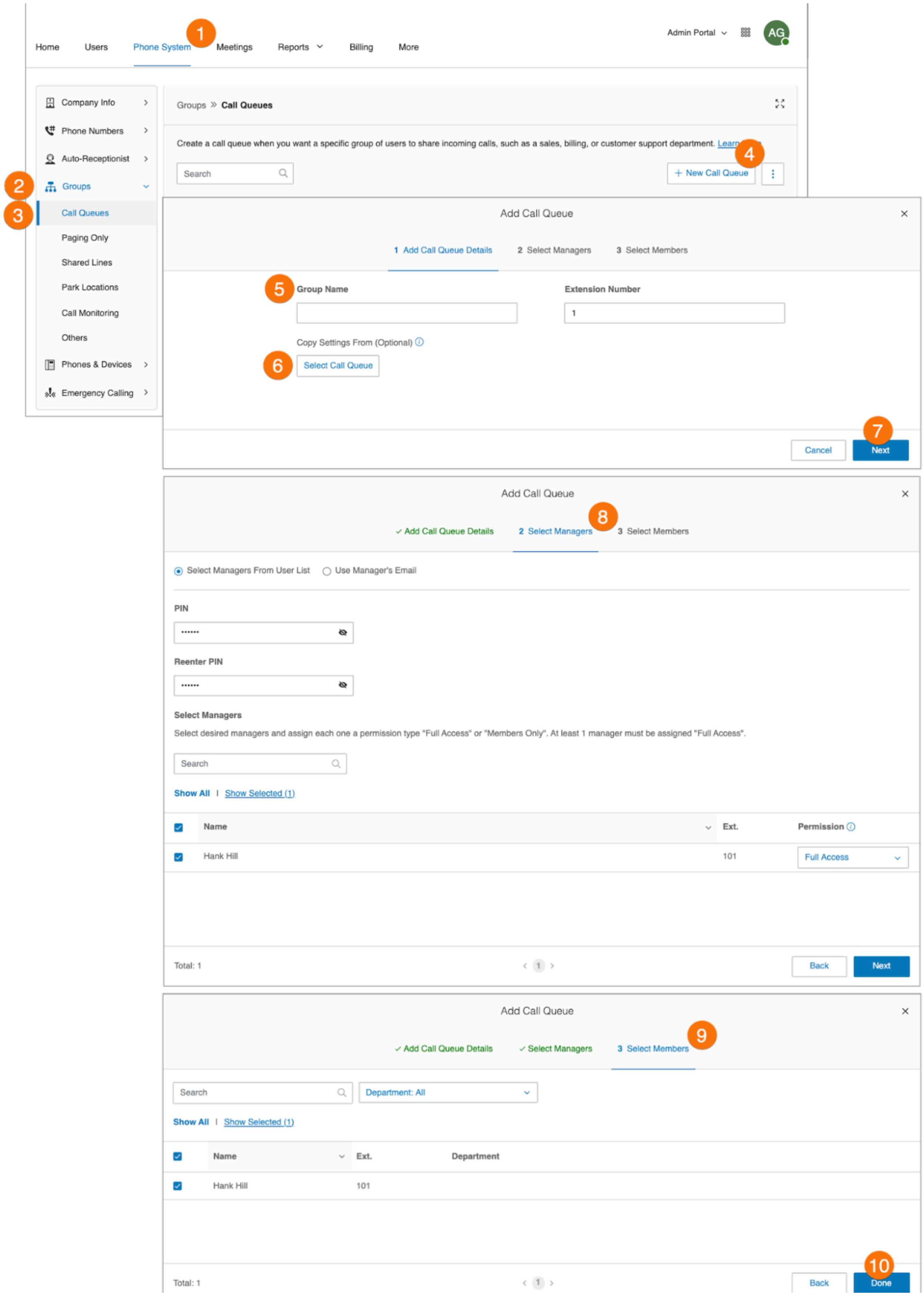

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Configuring a call queue

After you have created a Call Queue, you can configure the Call Queue Details, Direct Numbers, Greeting, Call Handling, Pickup settings, 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

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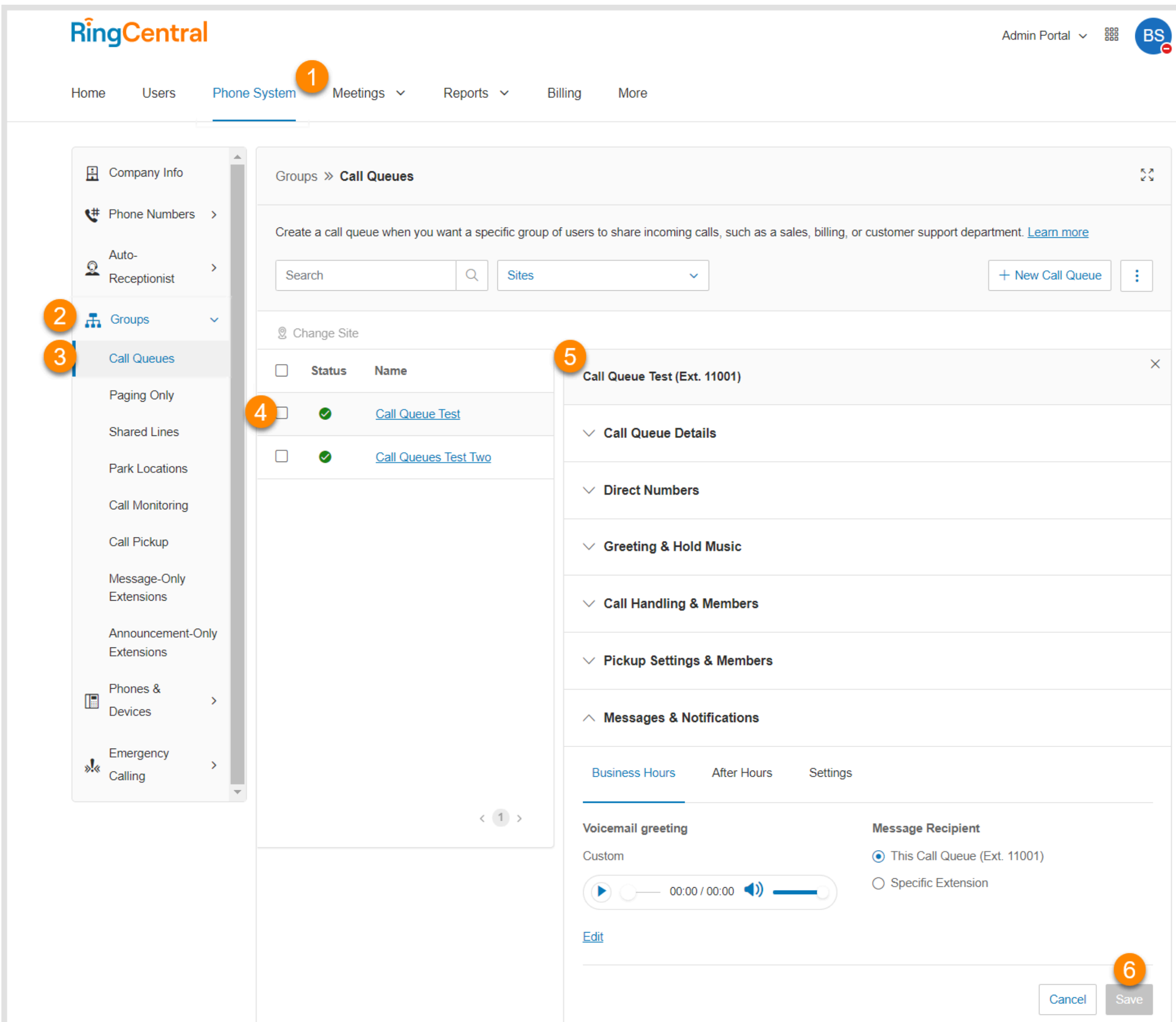
e. **Pickup Settings & Members**
   - Pickup members
   - Alert timer

f. **Messages & Notifications**
   - Voicemail Greeting
   - Message Recipient
   - Notification Settings

6. Click **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**.

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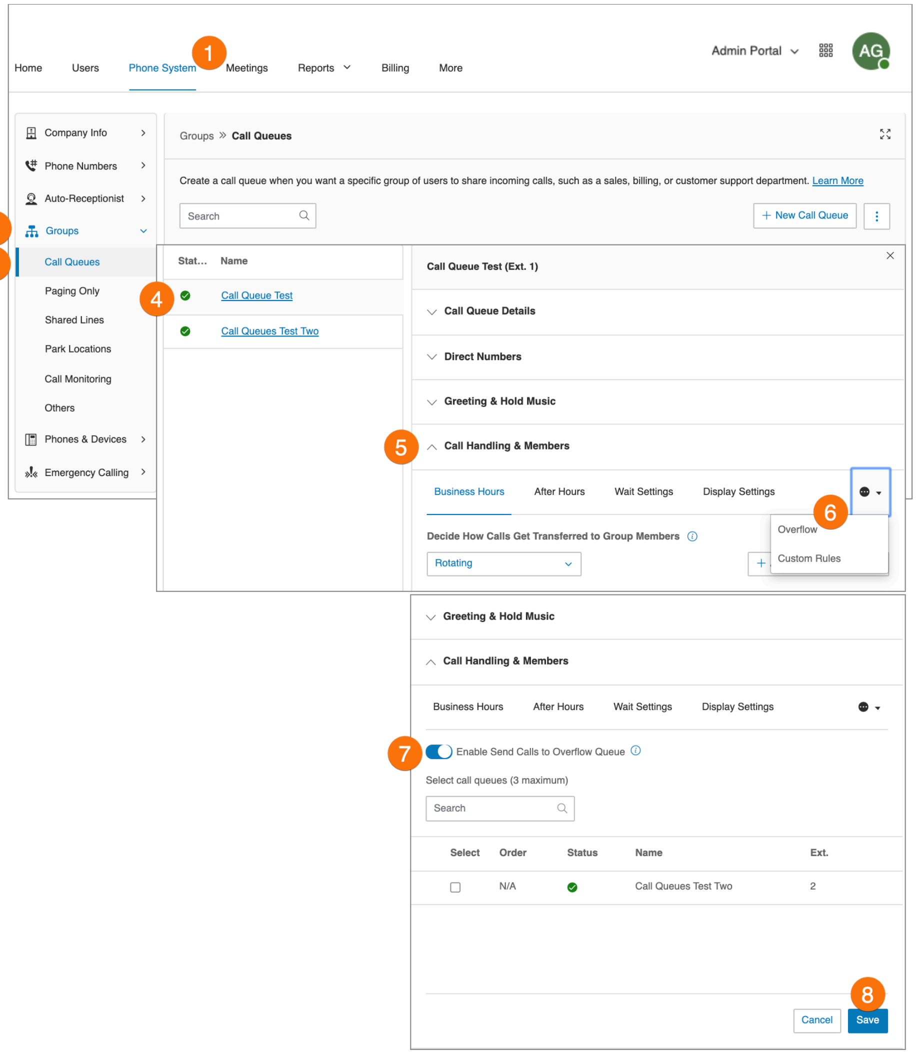

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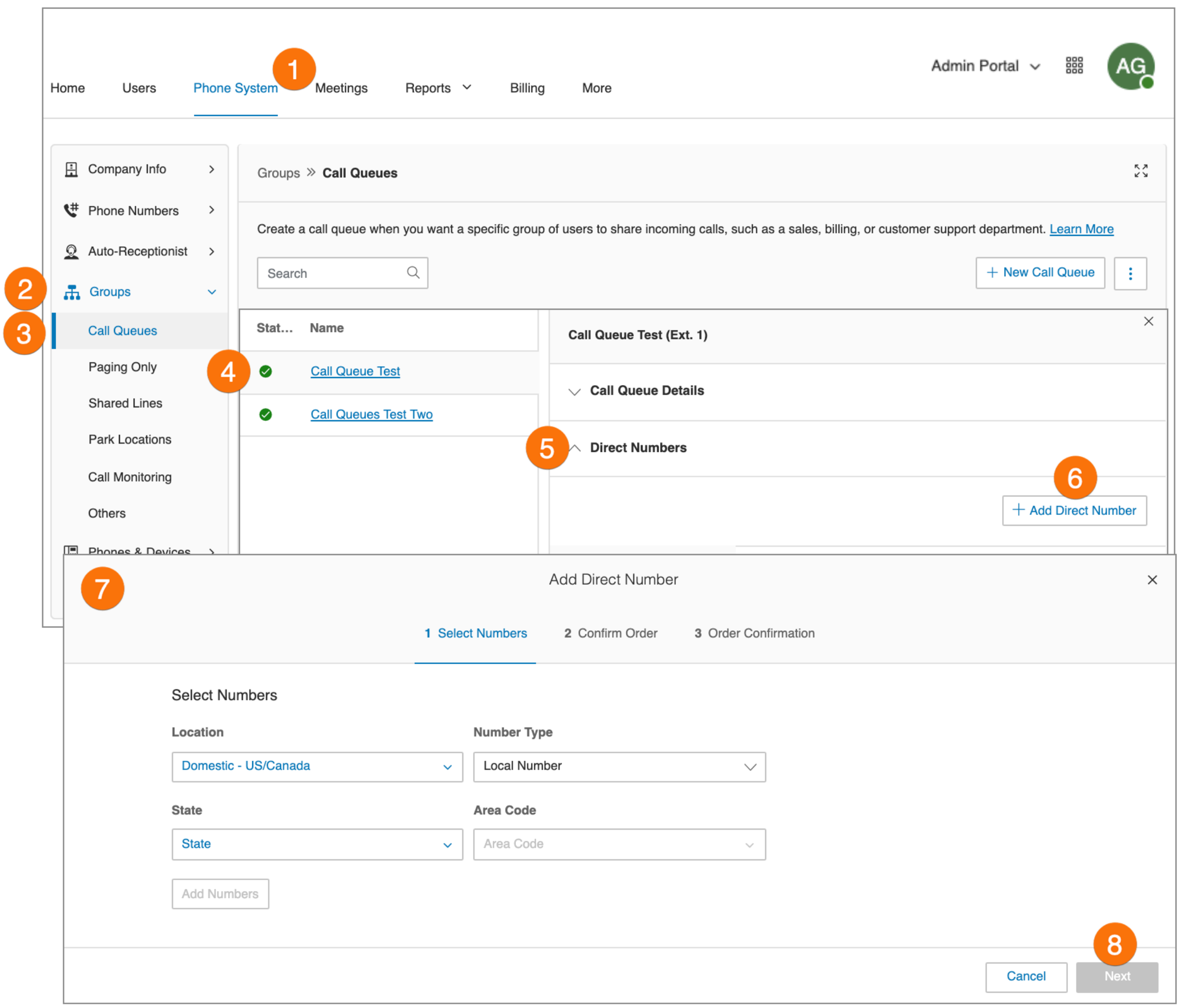
Adding a direct number

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.



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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.

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- **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**.

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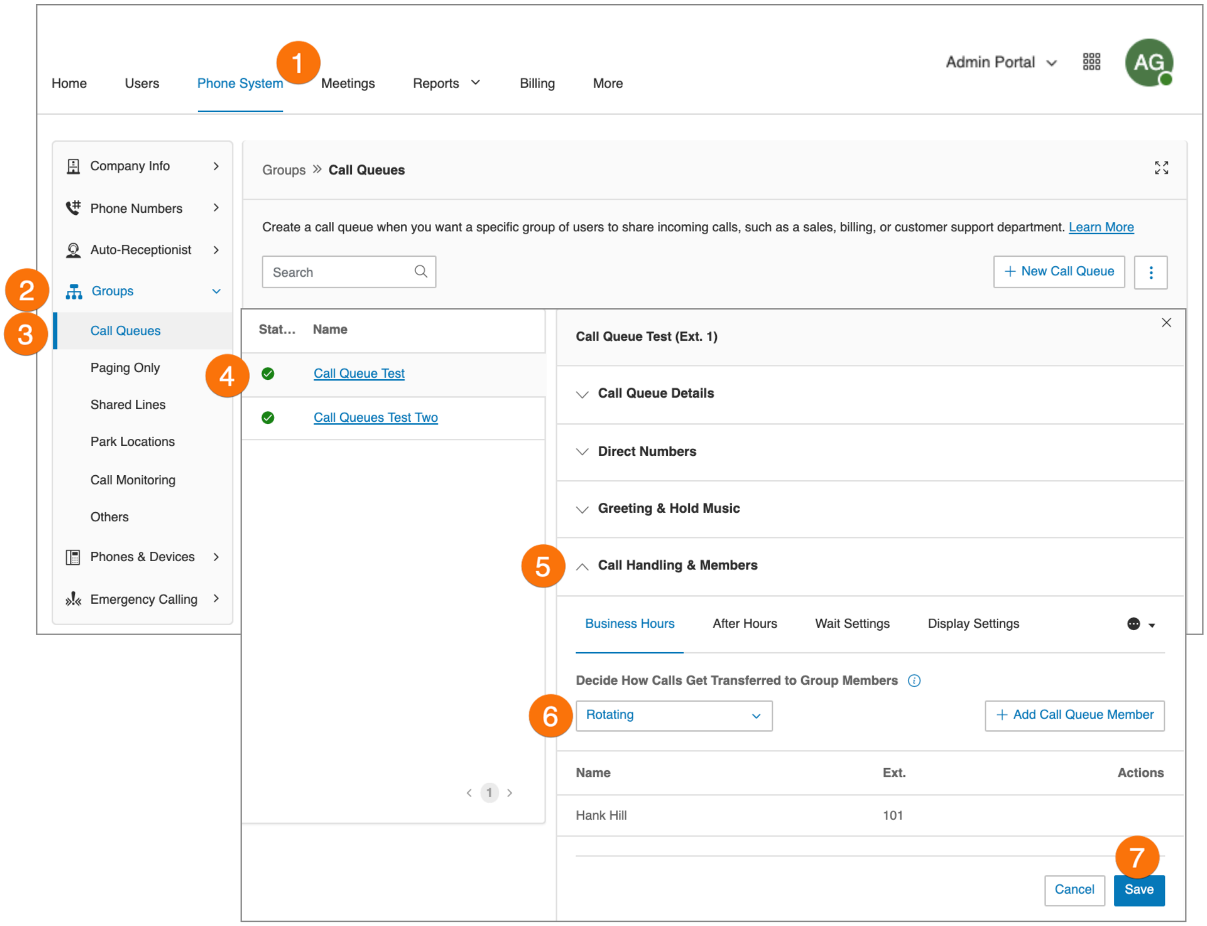
Home
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Auto-Receptionist
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Groups
3
Call Queues
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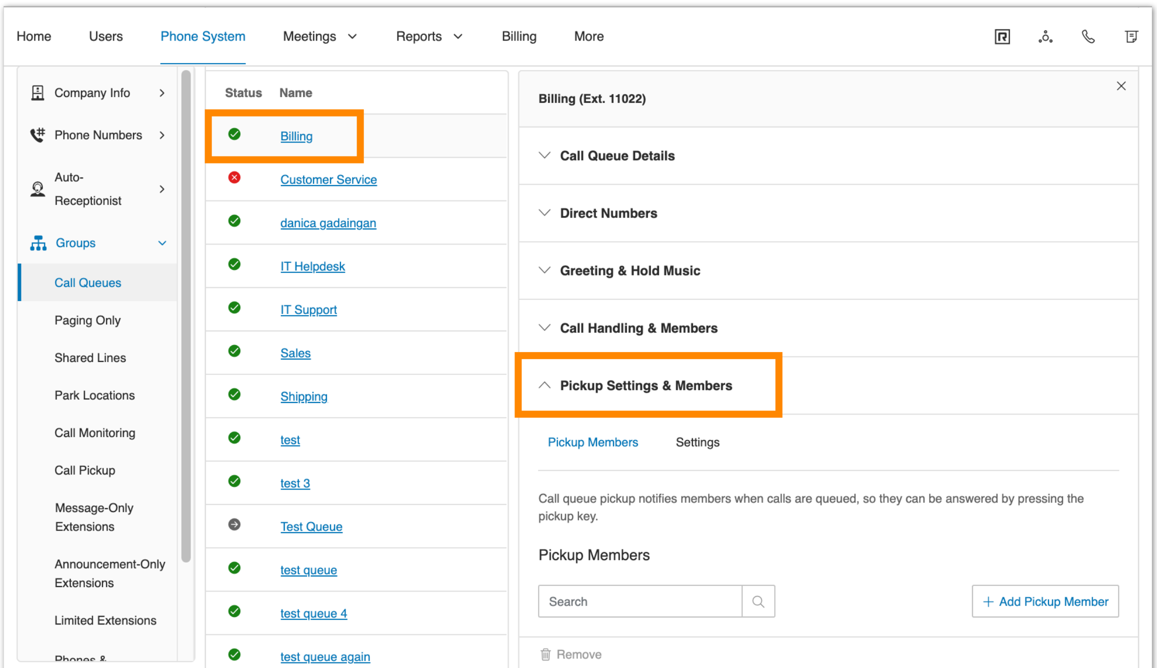
Shared Lines
Park Locations
Call Monitoring
Others
Phones & Devices
Emergency Calling
Groups » Call Queues
Create a call queue when you want a specific group of users to share incoming calls, such as a sales, billing, or customer support department. Learn More
Search
+ New Call Queue
Stat...
Name
4
Call Queue Test
Call Queues Test Two
Call Queue Test (Ext. 1)
Call Queue Details
Direct Numbers
Greeting & Hold Music
5
Call Handling & Members
Business Hours
After Hours
Wait Settings
Display Settings
Decide How Calls Get Transferred to Group Members
6
Rotating
+ Add Call Queue Member
Name
Ext.
Actions
Hank Hill
101
7
Cancel
Save

Pickup Settings & Members

The Call Queue Pickup feature allows administrators to specify an alternate group of users to answer calls when the primary agents of a call queue are unavailable. Pickup group members receive call notifications when callers wait on hold 'in-queue' for more than the configured 'Alert' time. Answer queued calls by pressing the pickup feature key on the phone.

Setting up Call Queue Pickup Groups

1. From the Admin Portal, go to **Phone System > Groups > Call Queues**.
2. Click the desired Call Queue name, then click **Pickup Settings & Members**.
3. On the **Pickup** members tab, select **Add Pickup Member**.



4. Search or browse the names, then add pickup members.
5. Click **Done**. This will prompt a confirmation box.
6. Click **OK**.

Setting up an alert timer

1. From the Admin Portal, go to **Phone System > Groups > Call Queues**.
2. Click the desired Call Queue name, then click **Pickup Settings & Members**.
3. Click **Settings**.

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4. Select an alert time duration. This is the amount of time before pickup group members will be notified there is a call waiting.
5. Click **Save**.

Removing a Pickup member

1. From the Admin Portal, go to **Phone System > Groups > Call Queues**.
2. Click the desired Call Queue name, then click **Pickup Settings & Members**.
3. Click **Remove** at the far right of the member's name you want to remove.

Setting up visual/audible call notifications

1. From the Admin Portal, go to **Users > User List > Users with Extensions**.
2. Click on the user you want to configure.
3. Select **Phones & Numbers**.
4. Click **Presence**.
5. Select **Ring my phone when any user I am monitoring rings**.
6. Click **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

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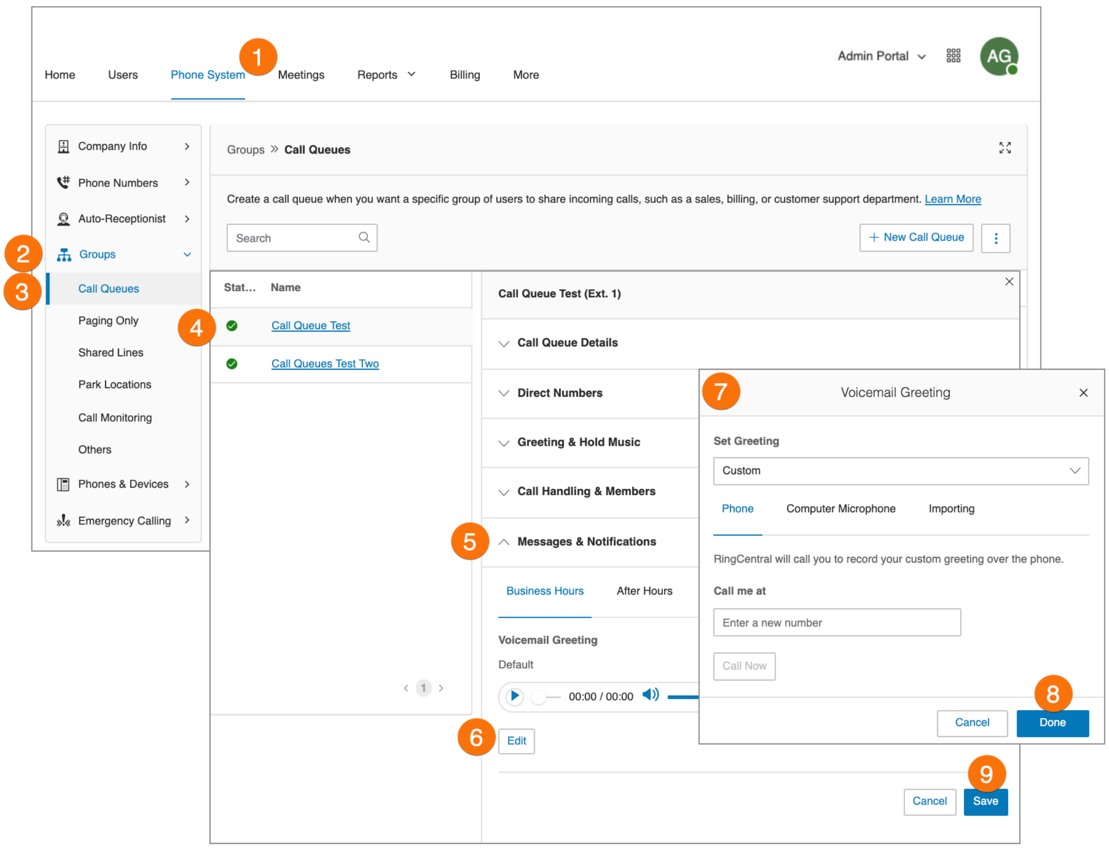
- **Computer Microphone**: Click Allow if RingCentral asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your greeting through your computer microphone. Stop the recording and listen to the playback
- **Import**: Browse for a WAV or MP3 file you want to use. Click **Open**.

8. Click **Done**.
9. Click **Save**.



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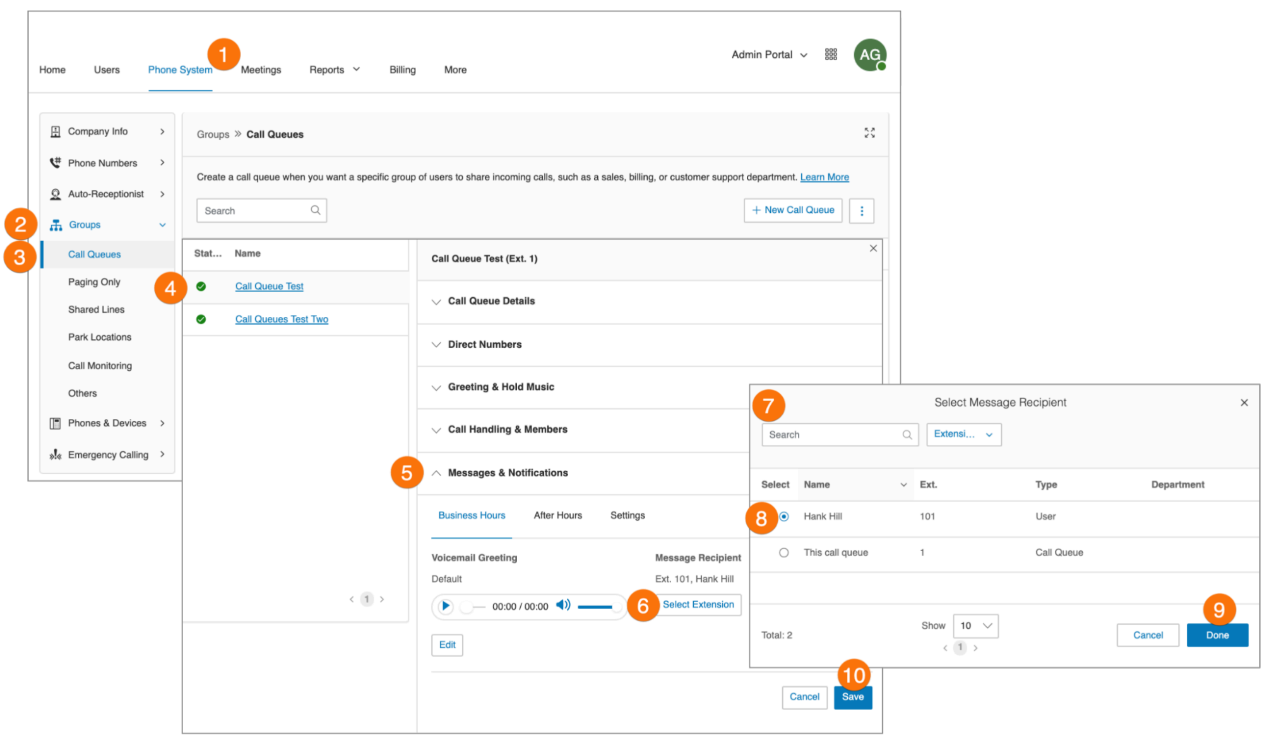
Setting message recipients

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:

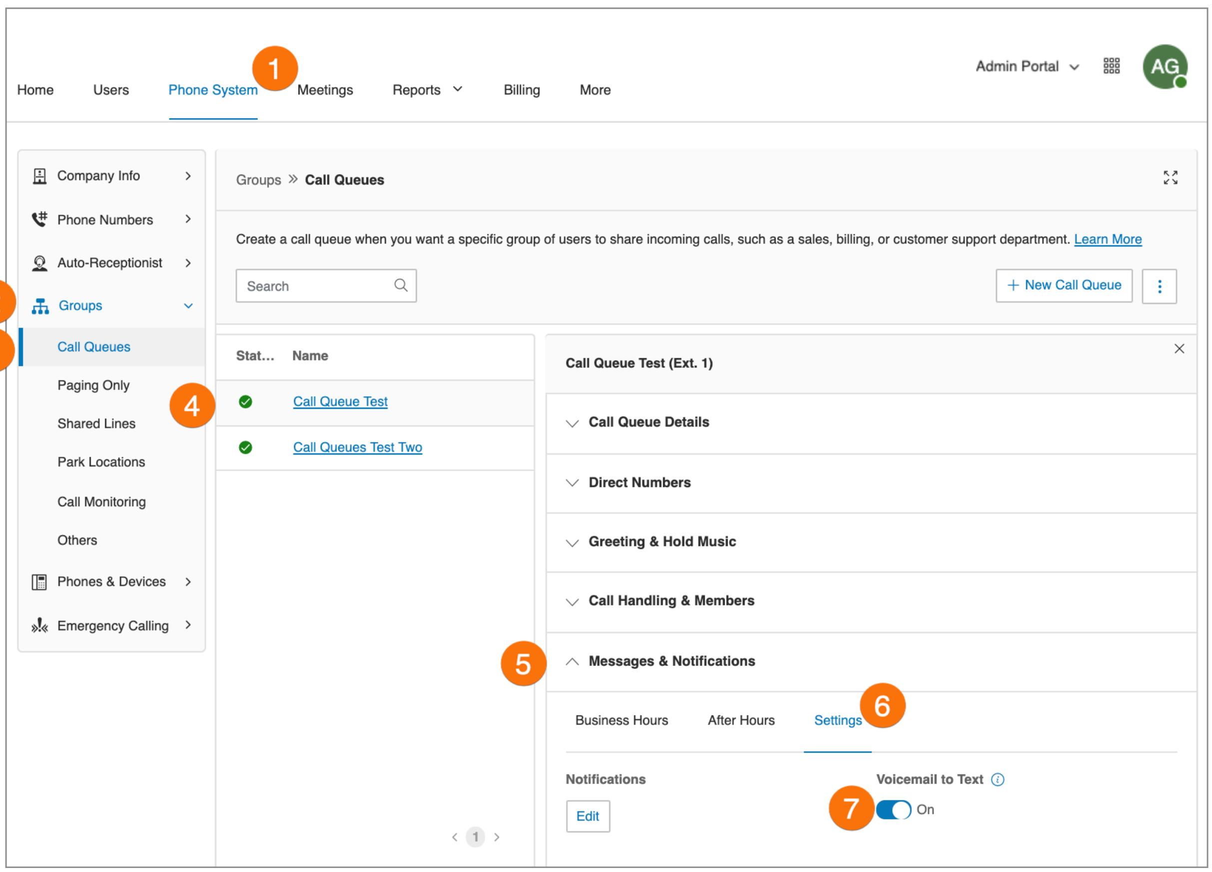
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select a **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Select Extension** under **Message Recipient**.
7. A window will appear with a list of members to receive messages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



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**



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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**.

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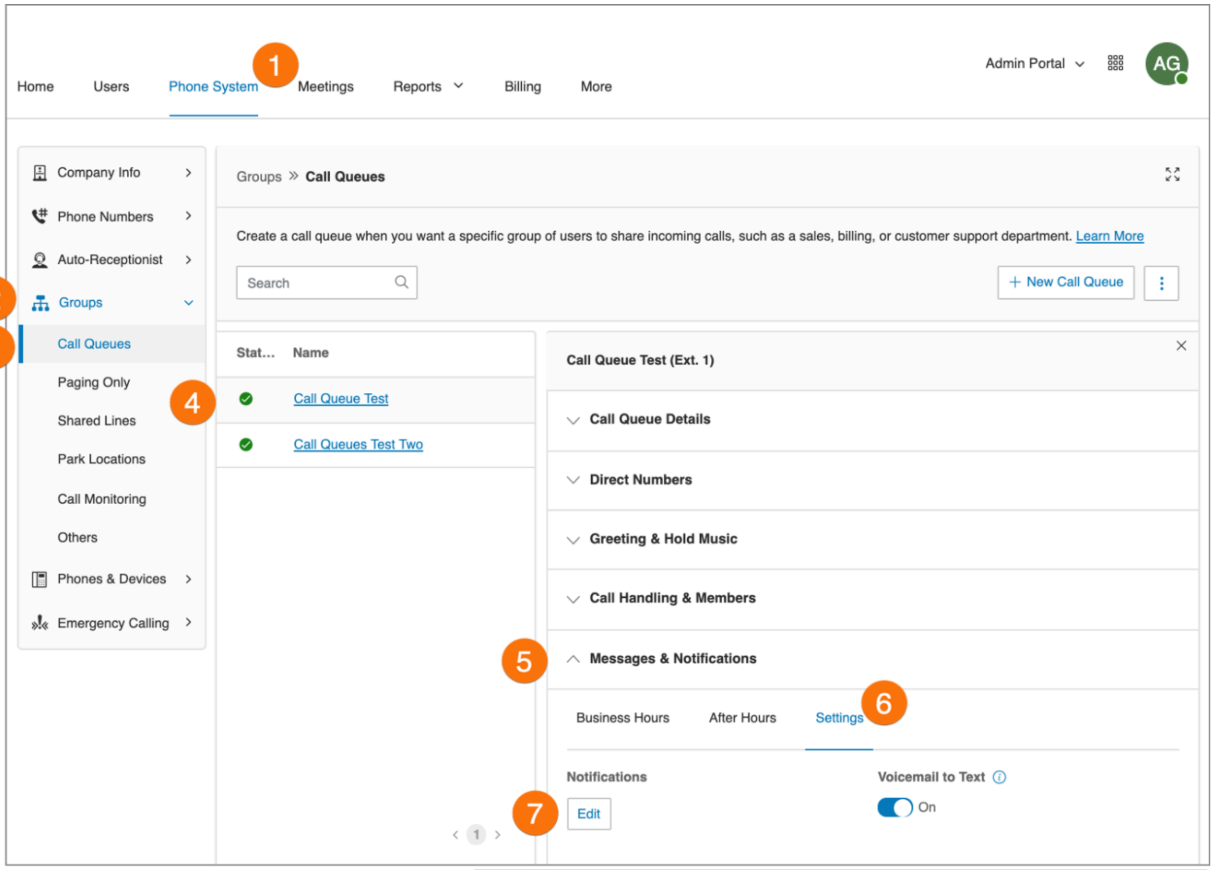
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Call Queues
Paging Only
Shared Lines
Park Locations
Call Monitoring
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Emergency Calling
Groups » Call Queues
Create a call queue when you want a specific group of users to share incoming calls, such as a sales, billing, or customer support department. Learn More
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+ 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
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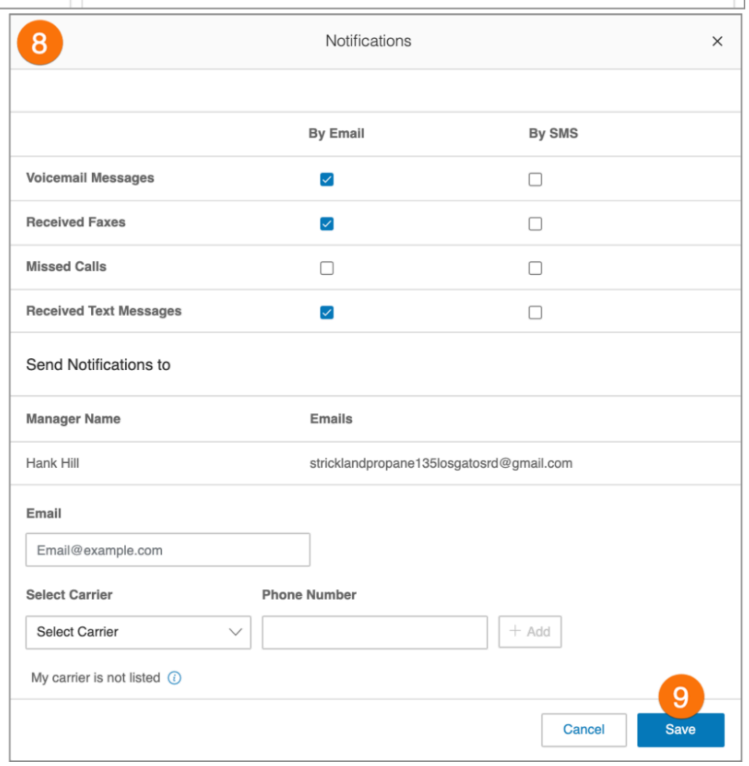

8
Notifications
By Email
By SMS
Voicemail Messages
Received Faxes
Missed Calls
Received Text Messages
Send Notifications to
Manager Name
Emails
Hank Hill
stricklandpropane135losgatosrd@gmail.com
Email
Email@example.com
Select Carrier
Phone Number
Select Carrier
+ Add
My carrier is not listed
Cancel
Save
9

Paging only groups

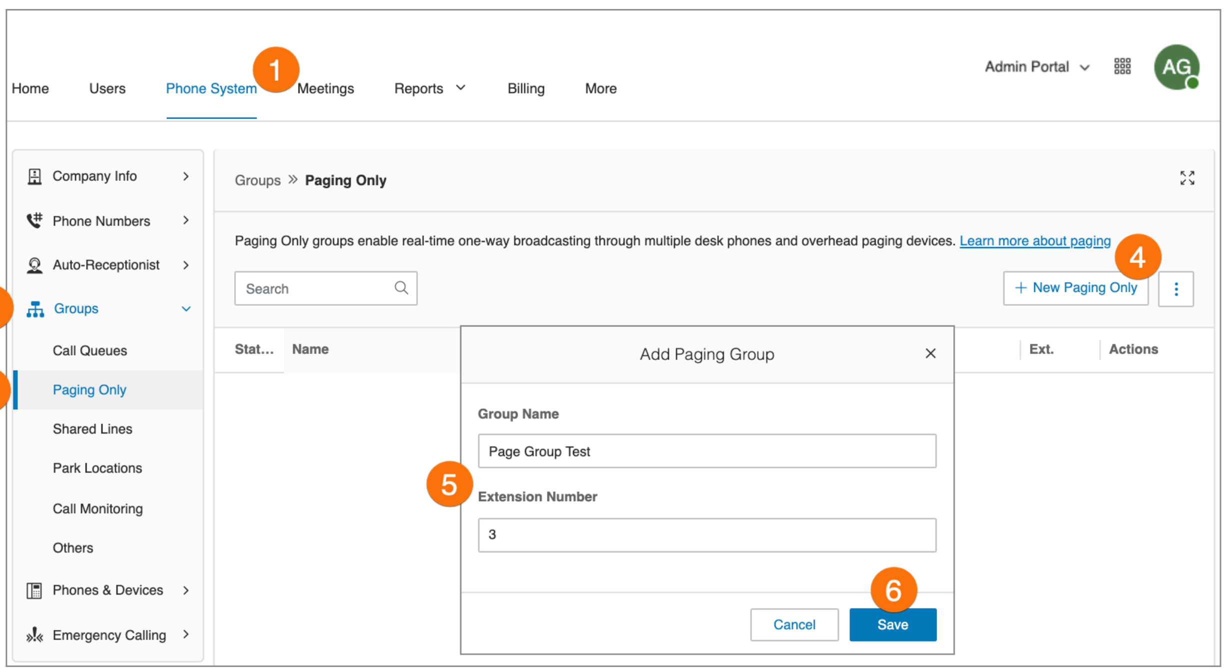
Paging Only groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices. Paging Only groups are great for a variety of locations such as warehouse/shipping centers, retail stores, schools, and hospitals, among others.

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.



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**.

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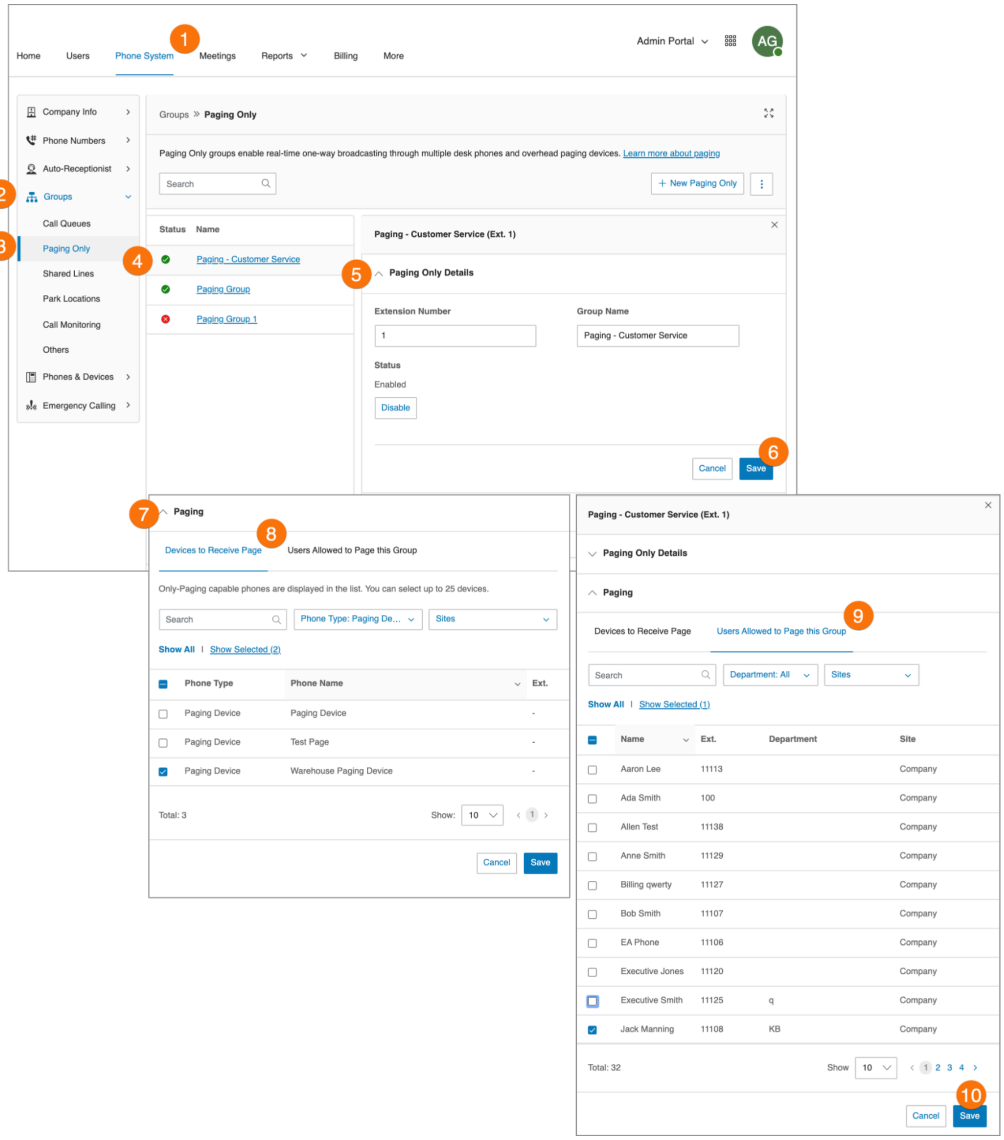

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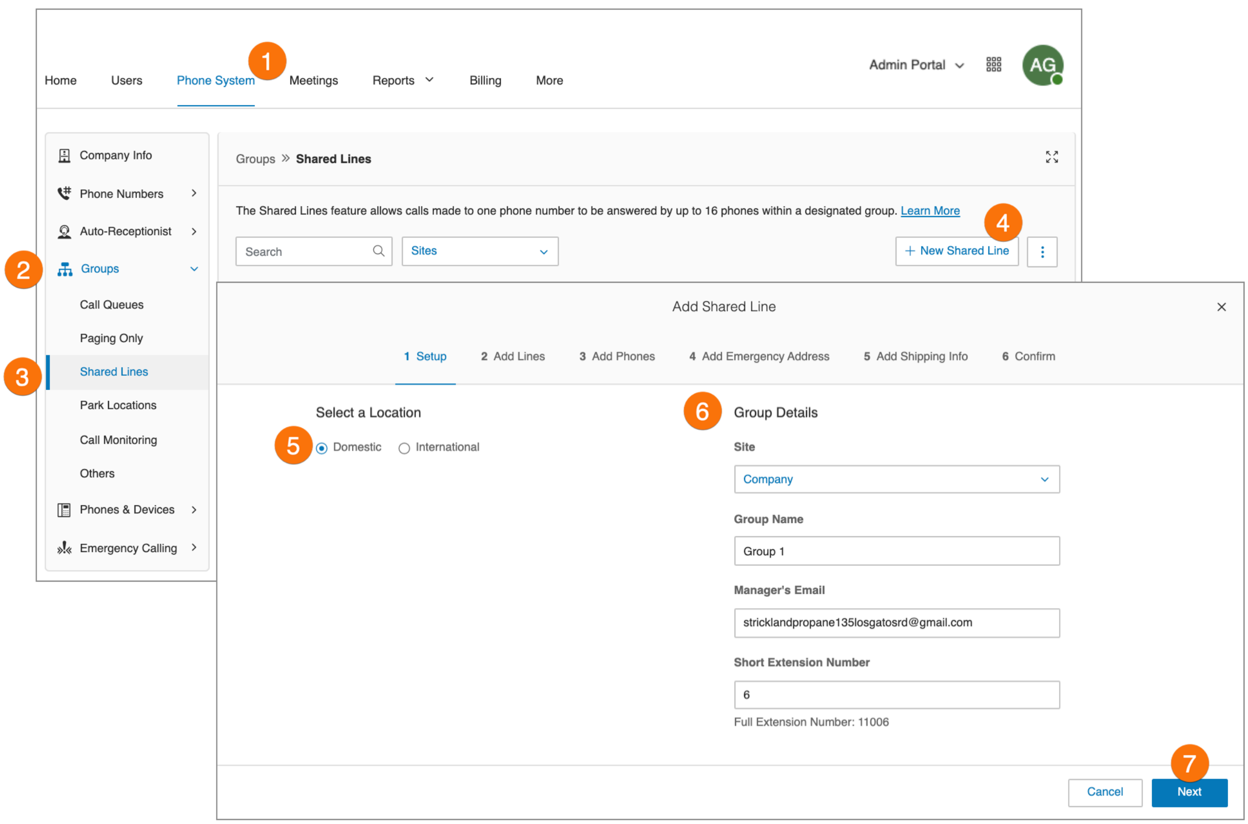
Shared line groups

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**.



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**.

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   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.

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7. Click the 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**:

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        - Click **Edit**.
        - Select **Group Voicemail** or an extension.
        - Click **Done**.
    b. Select an option on the dropdown menu under N**umber 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**.

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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.**

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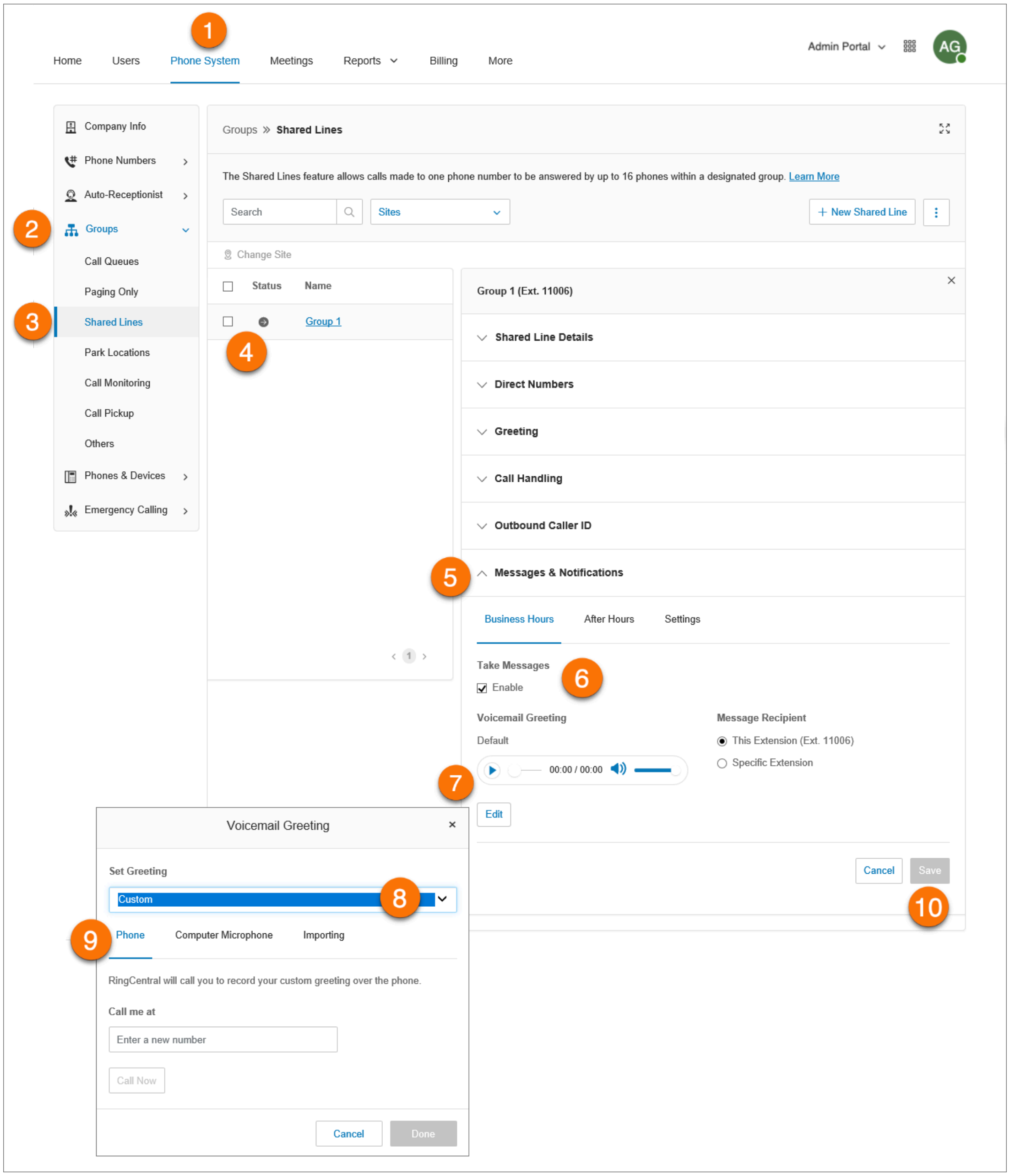

Setting a message recipient

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.

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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**.

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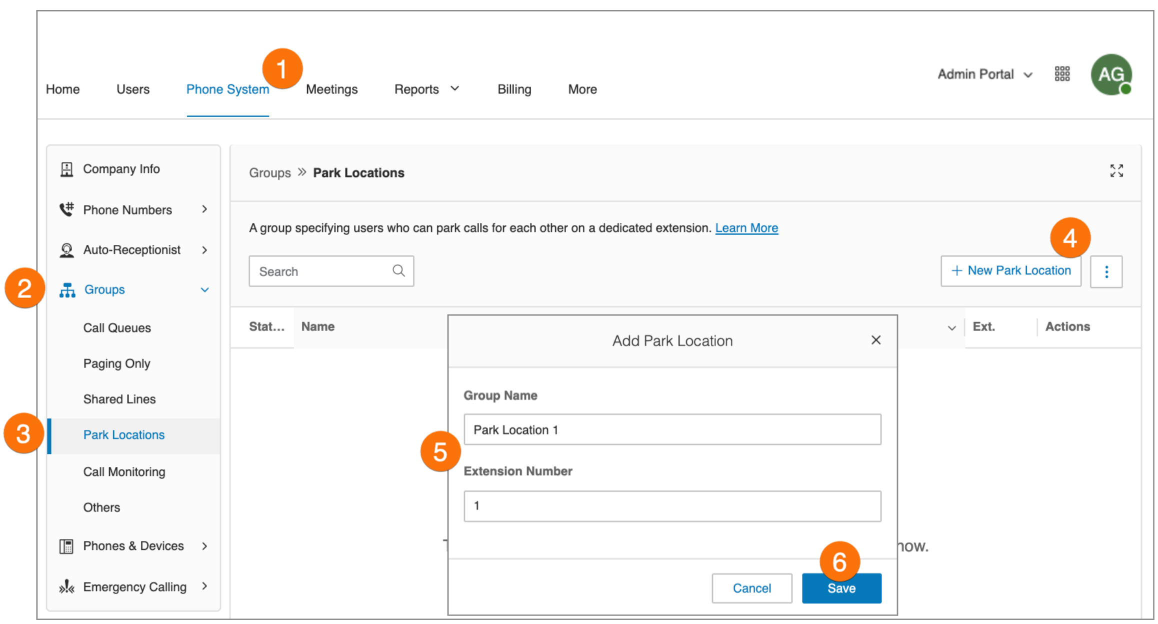
Park location groups

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 **Yes** to add a Phone Key automatically to member phones (optional).
7. Click **Save**.

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



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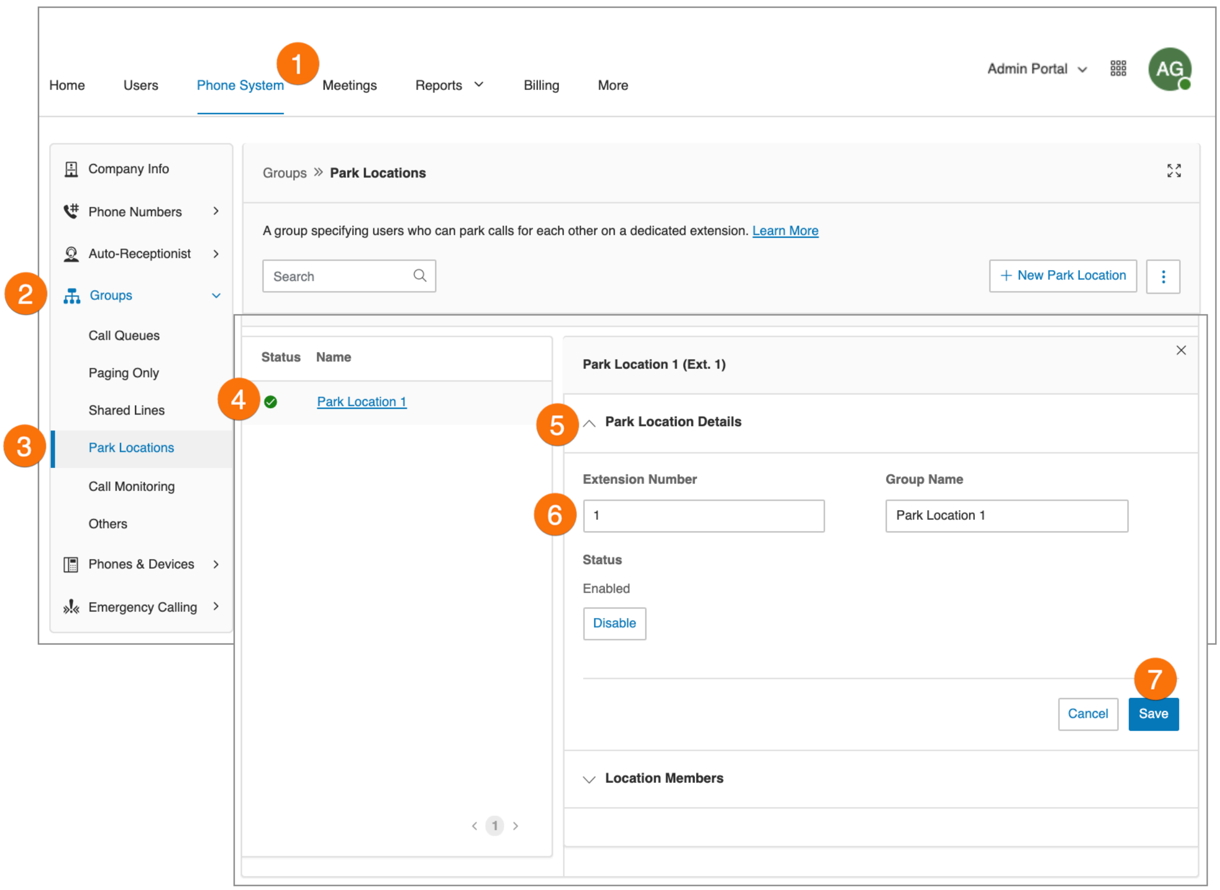
Configuring a park location

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:

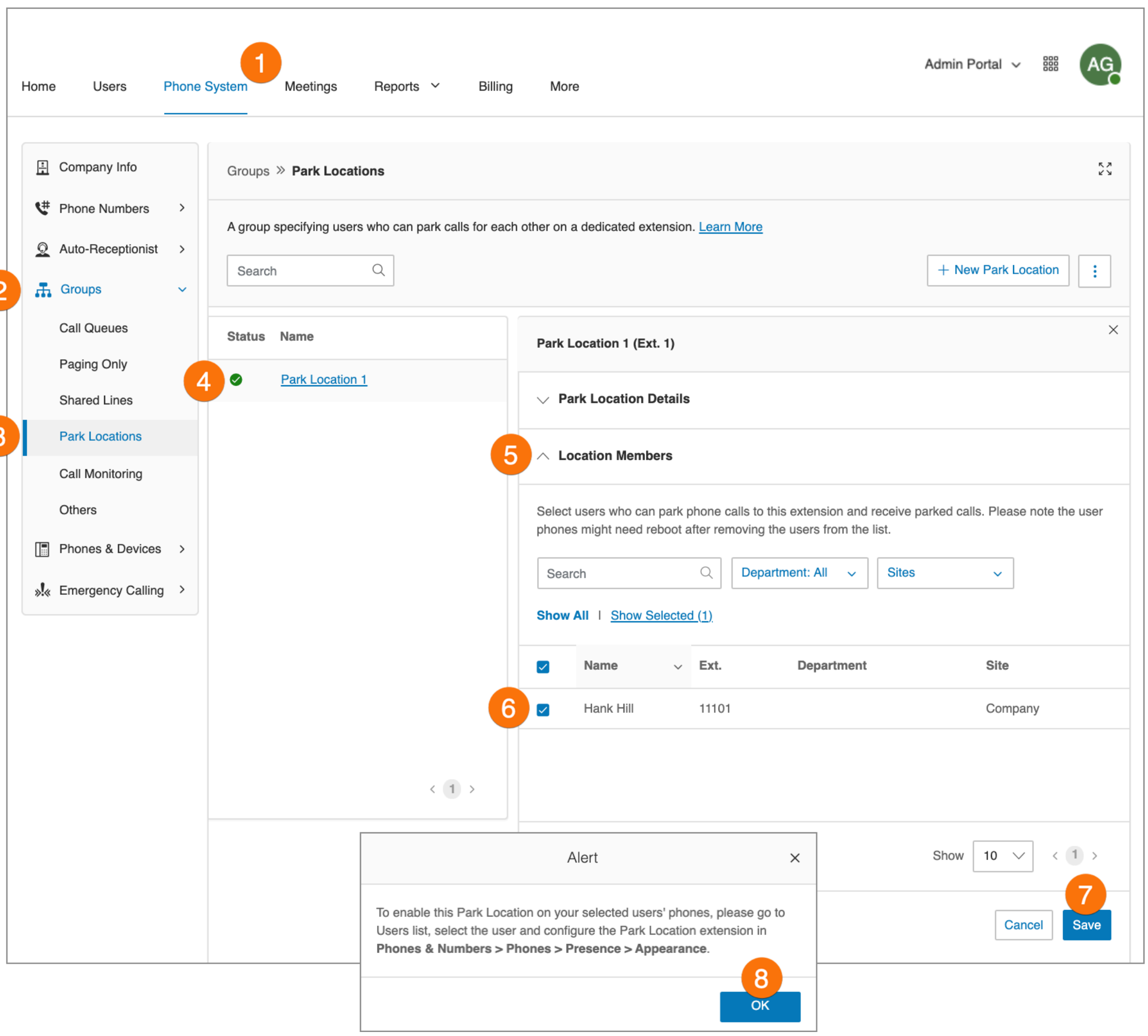
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Park Locations**.
4. Select an existing **Park Location**.
5. Click **Park Location Details**.
6. Edit the **Extension Number** and **Park Location**.
7. Click **Save**.



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.



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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**.

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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	• 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	• Cisco SPA525G • Cisco CP8851 • Cisco SPA504G • Cisco SPA509G • Cisco CP7841 • Cisco 7841 • Cisco 8861

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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.

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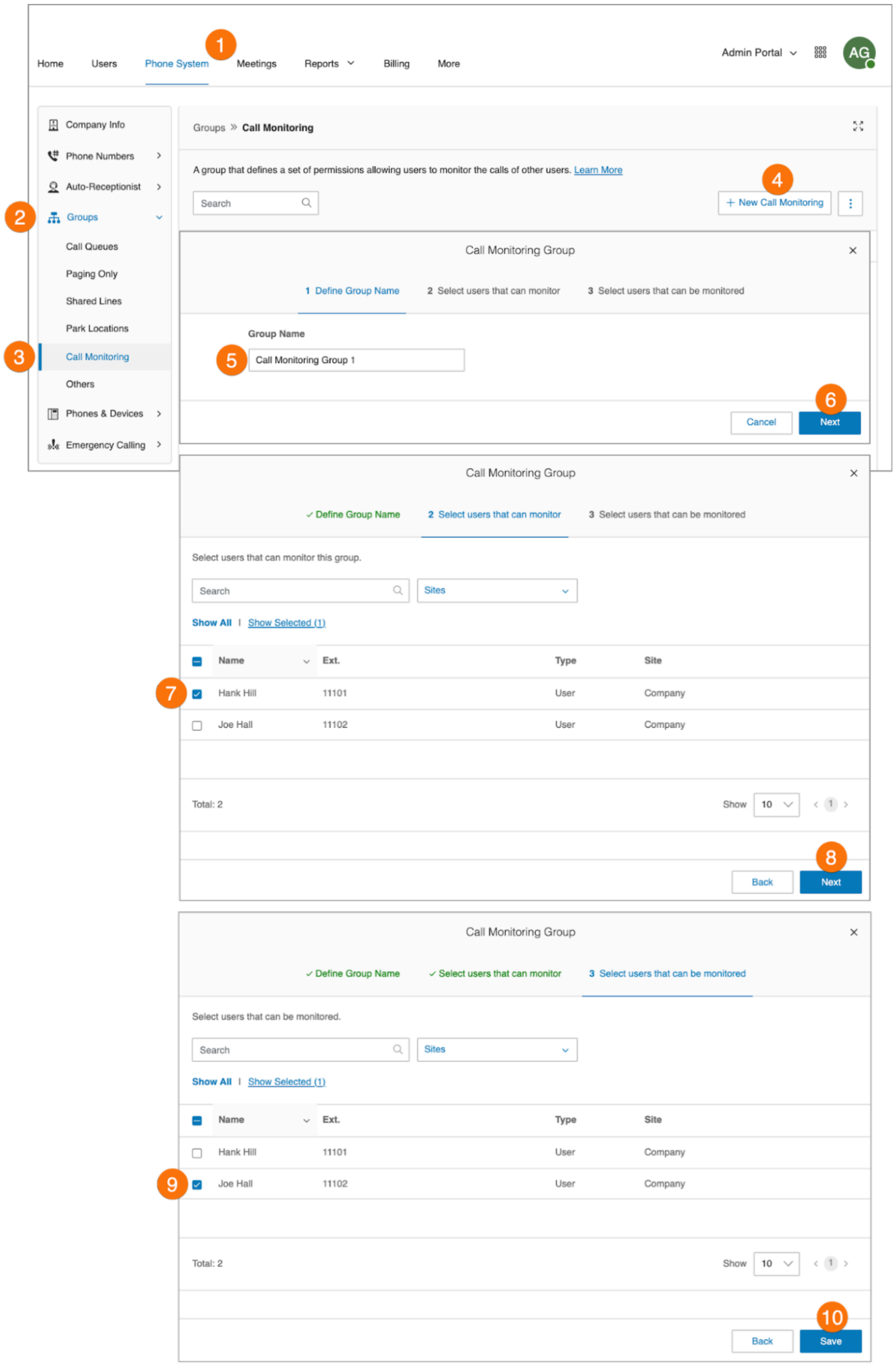

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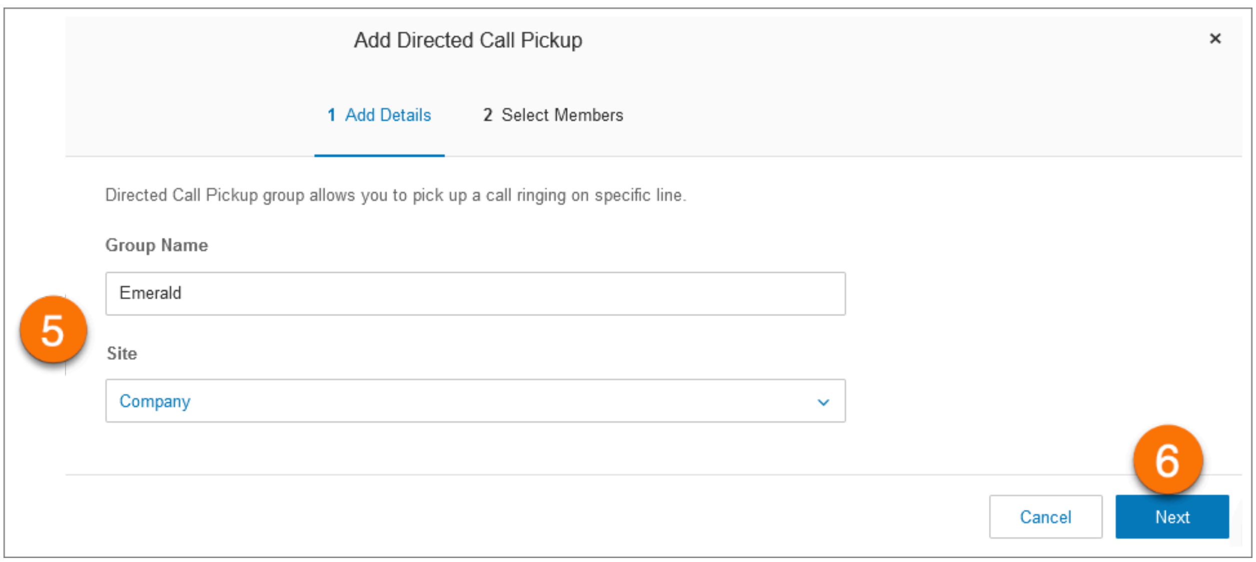
Directed call pickup

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**.



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**.

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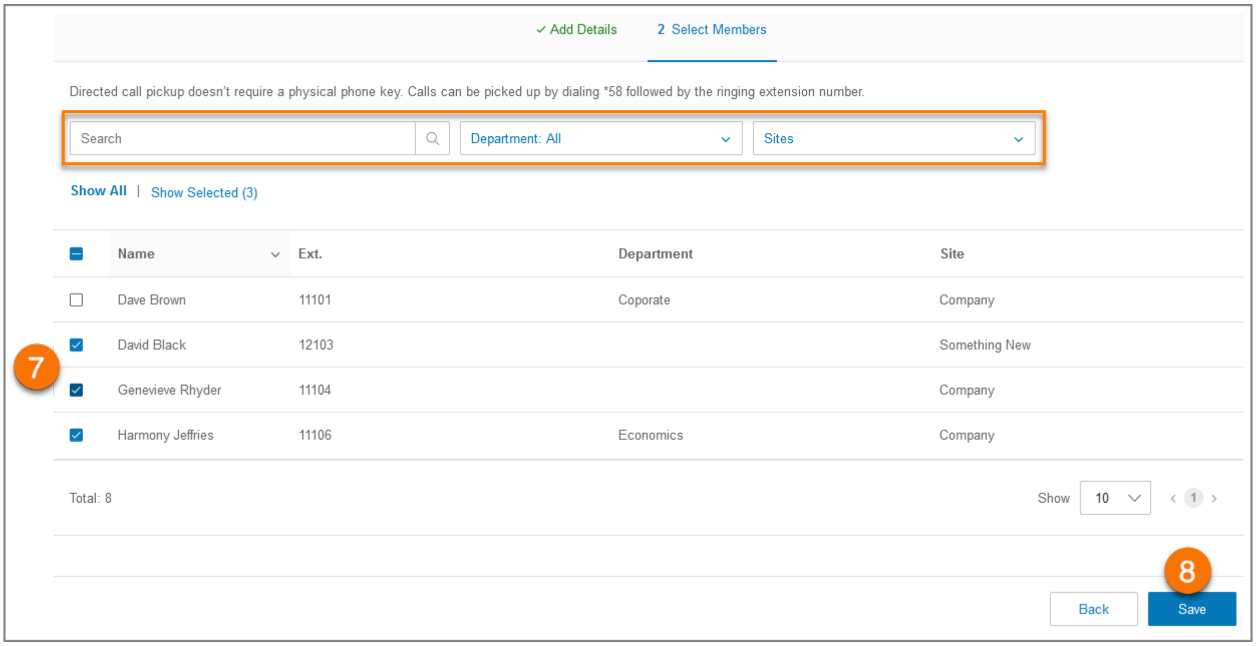
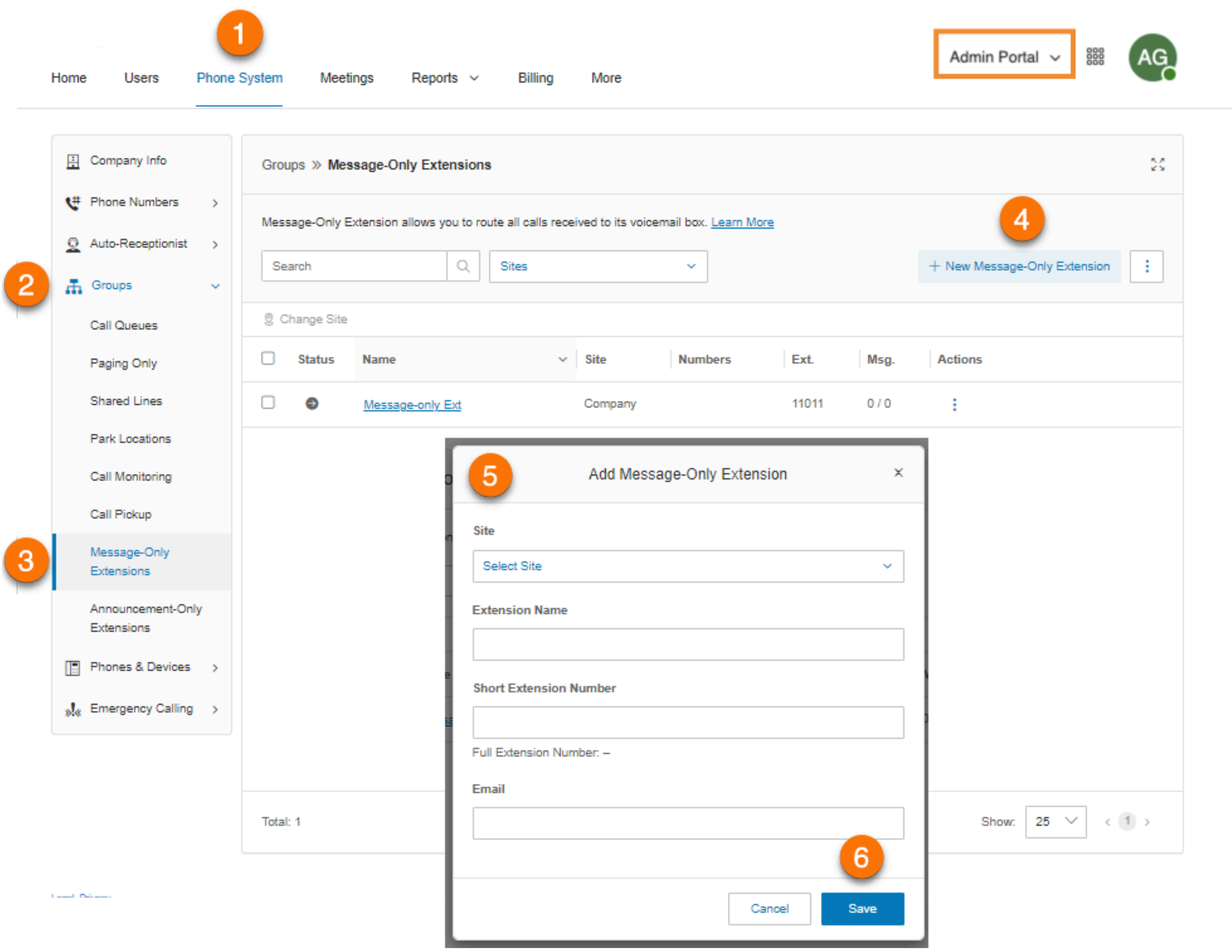

✓ Add Details
2 Select Members
Directed call pickup doesn't require a physical phone key. Calls can be picked up by dialing *58 followed by the ringing extension number.
Search
Department: All
Sites
Show All | Show Selected (3)
Name
Ext.
Department
Site
Dave Brown
11101
Coporate
Company
David Black
12103
Something New
Genevieve Rhyder
11104
Company
Harmony Jeffries
11106
Economics
Company
Total: 8
Show
10
7
8
Back
Save

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**.



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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**

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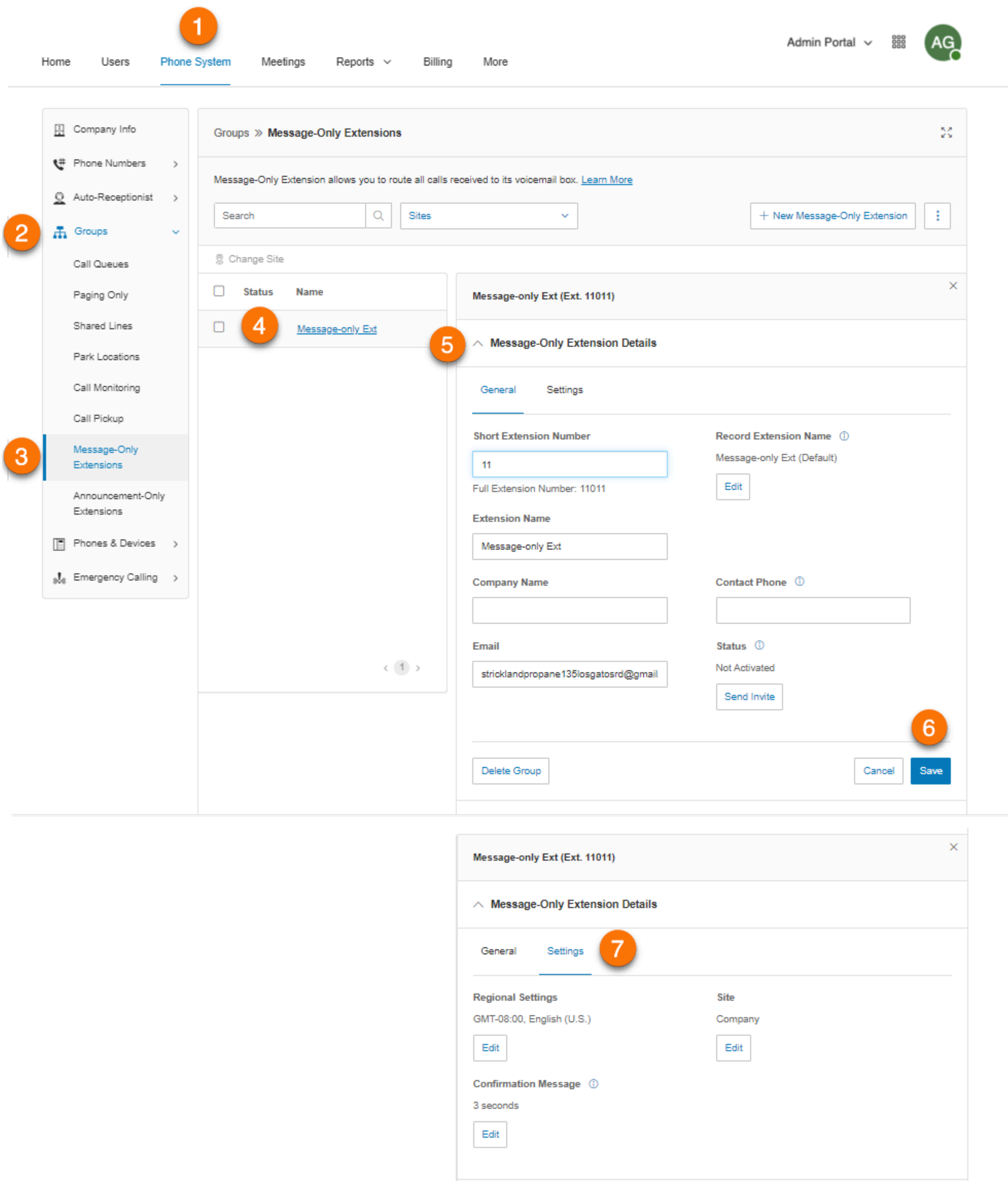

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Recording an extension name

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**.

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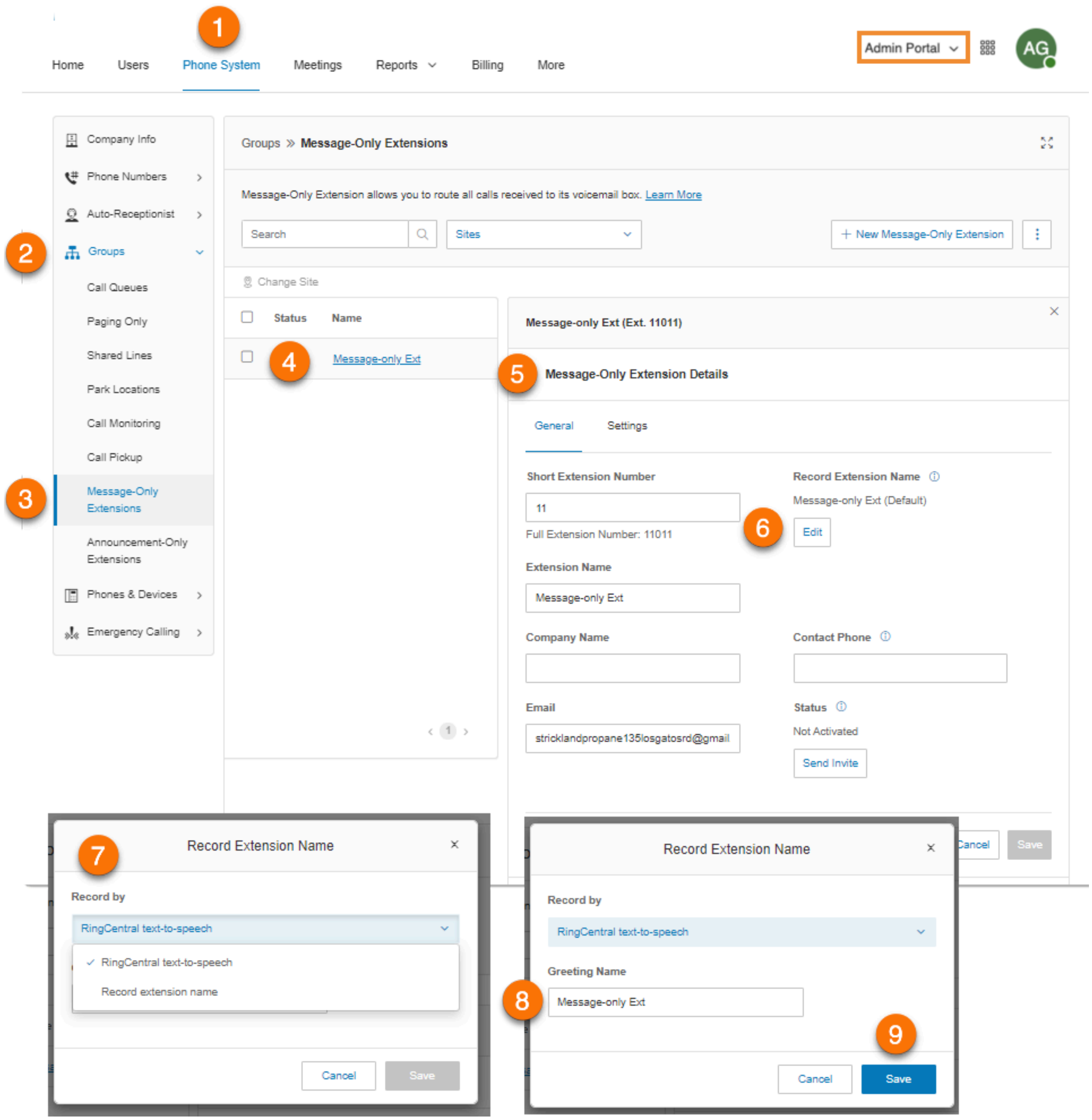
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Message-Only Extension allows you to route all calls received to its voicemail box. Learn More
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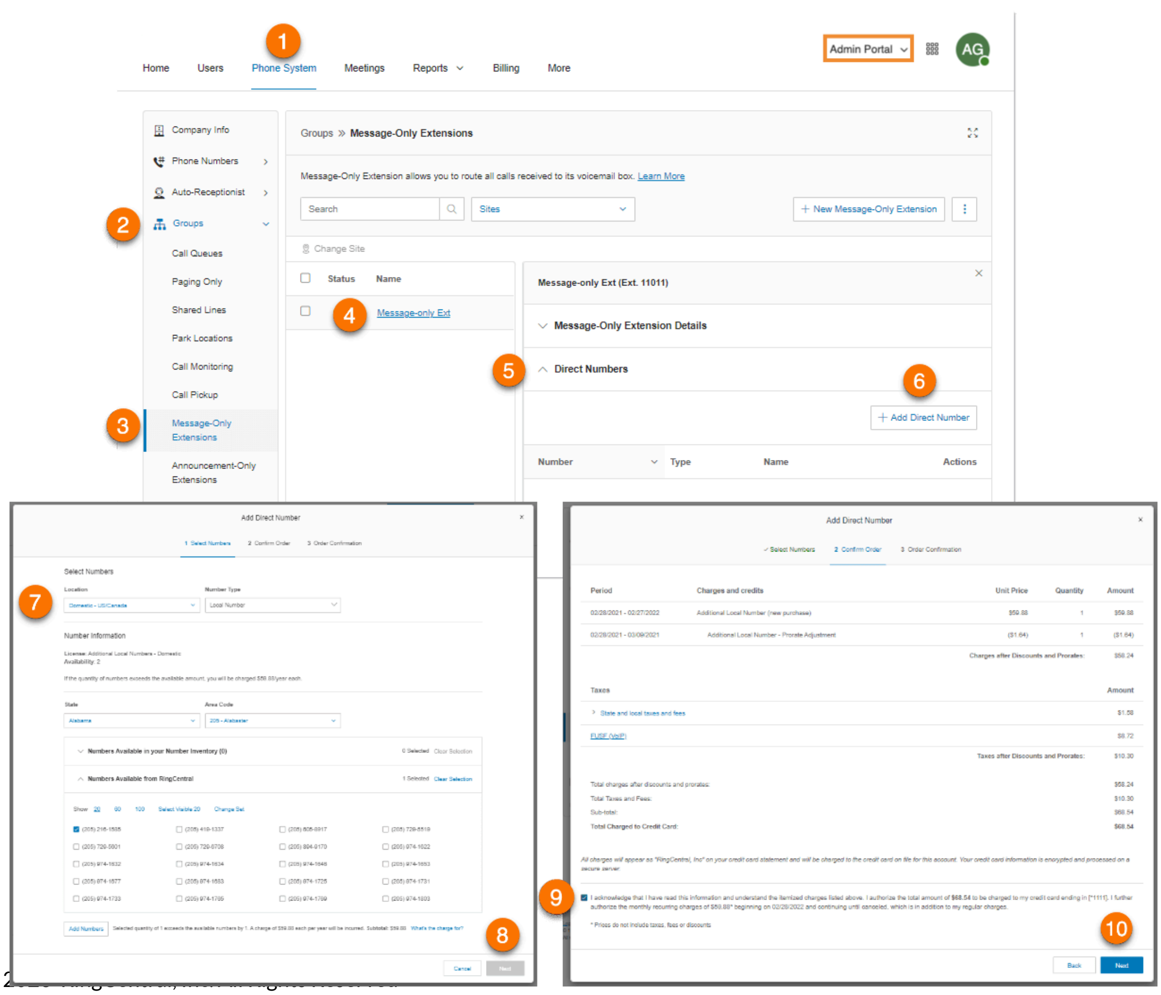
11
Full Extension Number: 11011
Record Extension Name
Message-only Ext (Default)
Edit
Extension Name
Message-only Ext
Company Name
Contact Phone
Email
stricklandpropane135losgatosrd@gmail
Status
Not Activated
Send Invite
Record Extension Name
Record by
RingCentral text-to-speech
RingCentral text-to-speech
Record extension name
Cancel
Save
Record Extension Name
Record by
RingCentral text-to-speech
Greeting Name
Message-only Ext
Cancel
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**.

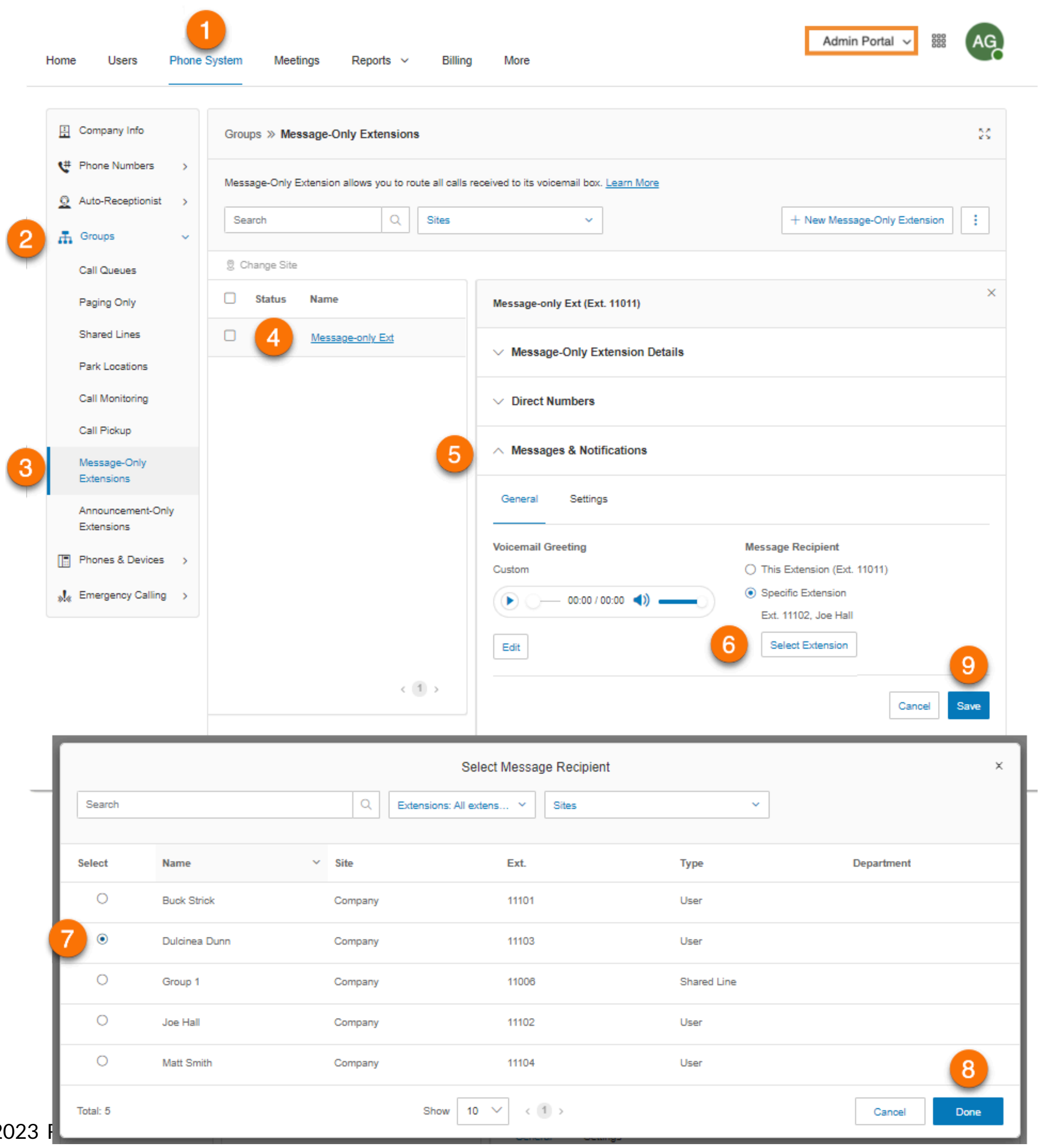


© 2

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**.



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**.

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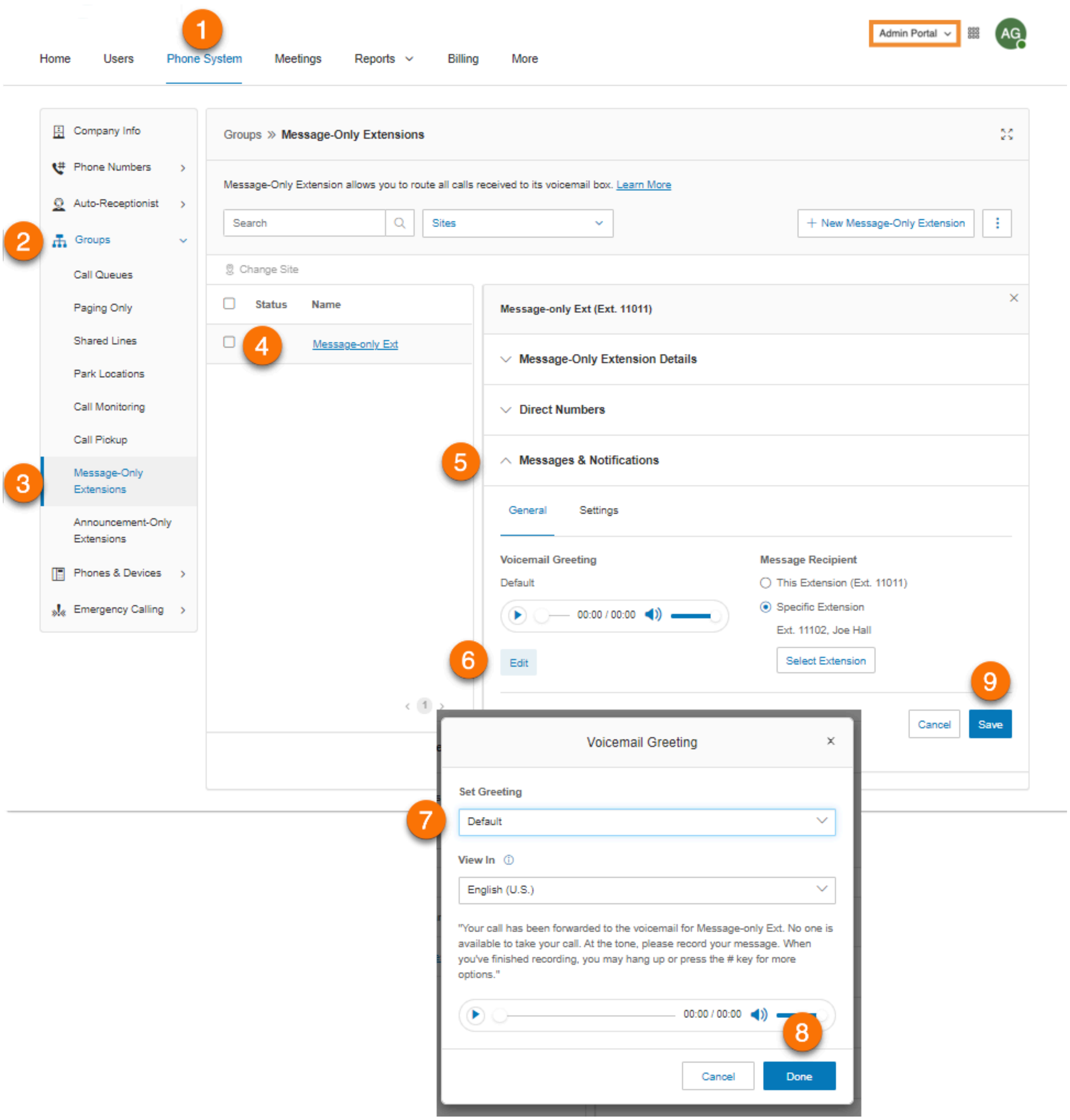

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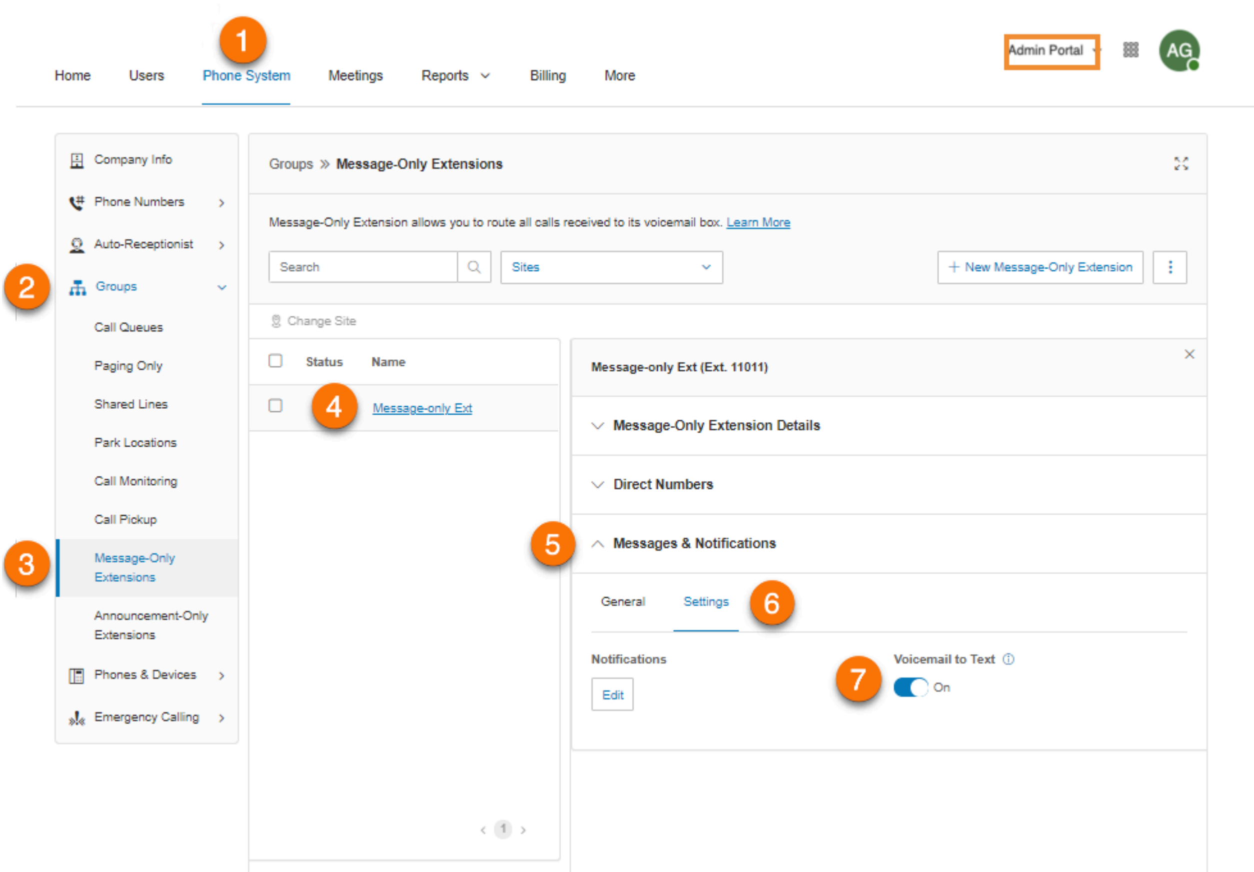
Setting voicemail-to-text

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**.



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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**.

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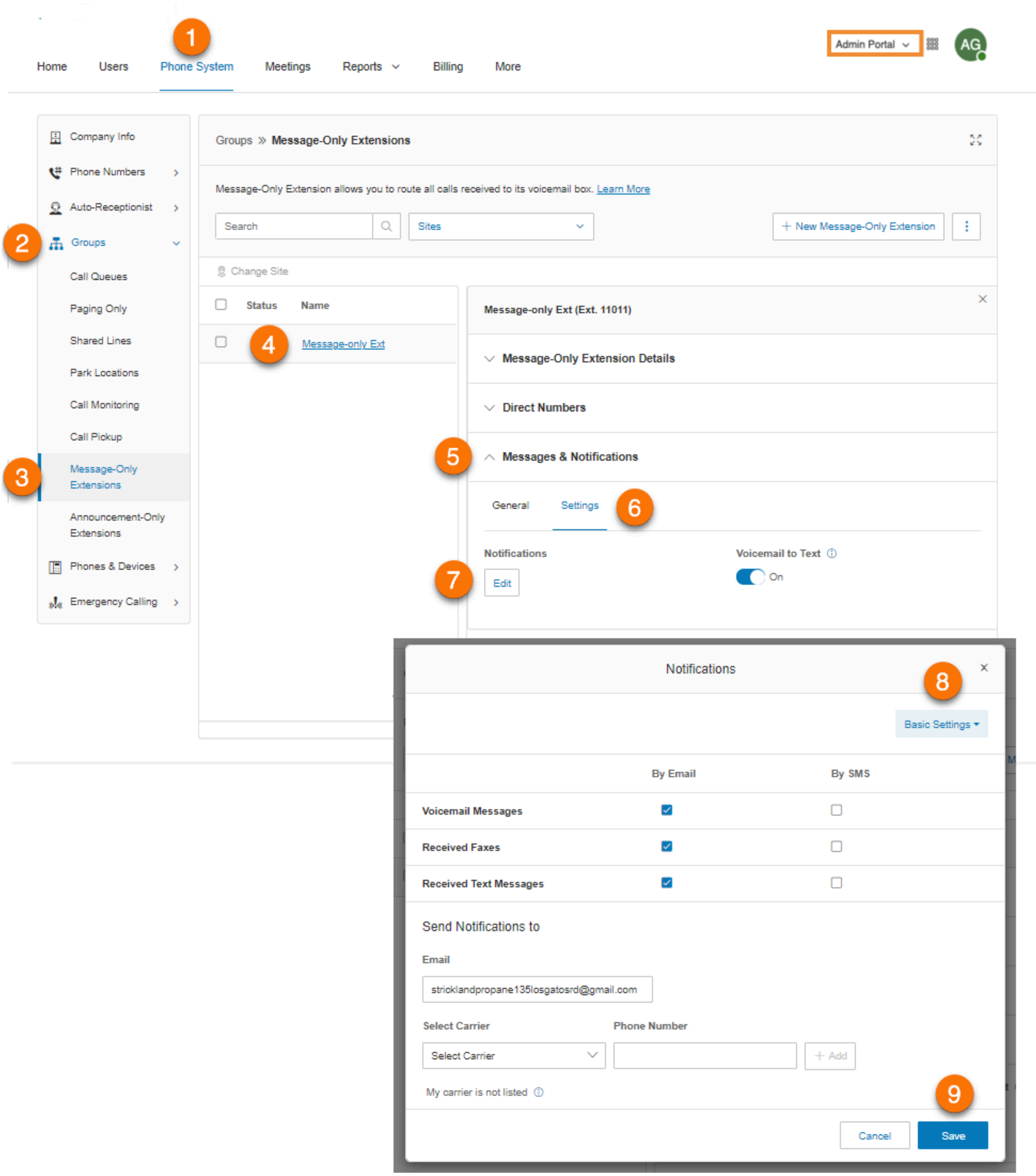
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Announcement-Only Extensions
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Message-Only Extension allows you to route all calls received to its voicemail box. Learn More
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Phone Number
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+ Add
My carrier is not listed
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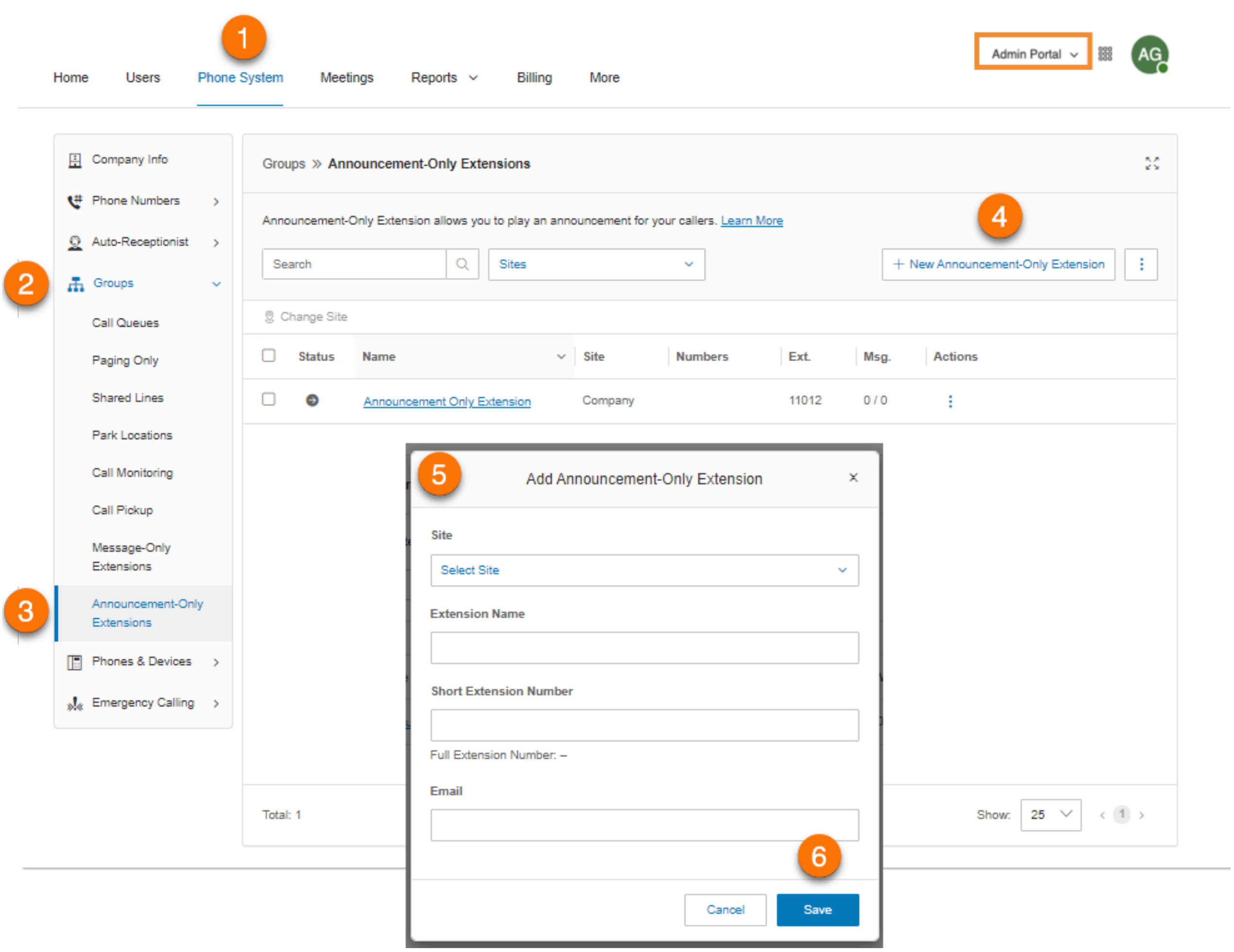
Announcement-only extensions

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**.



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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**

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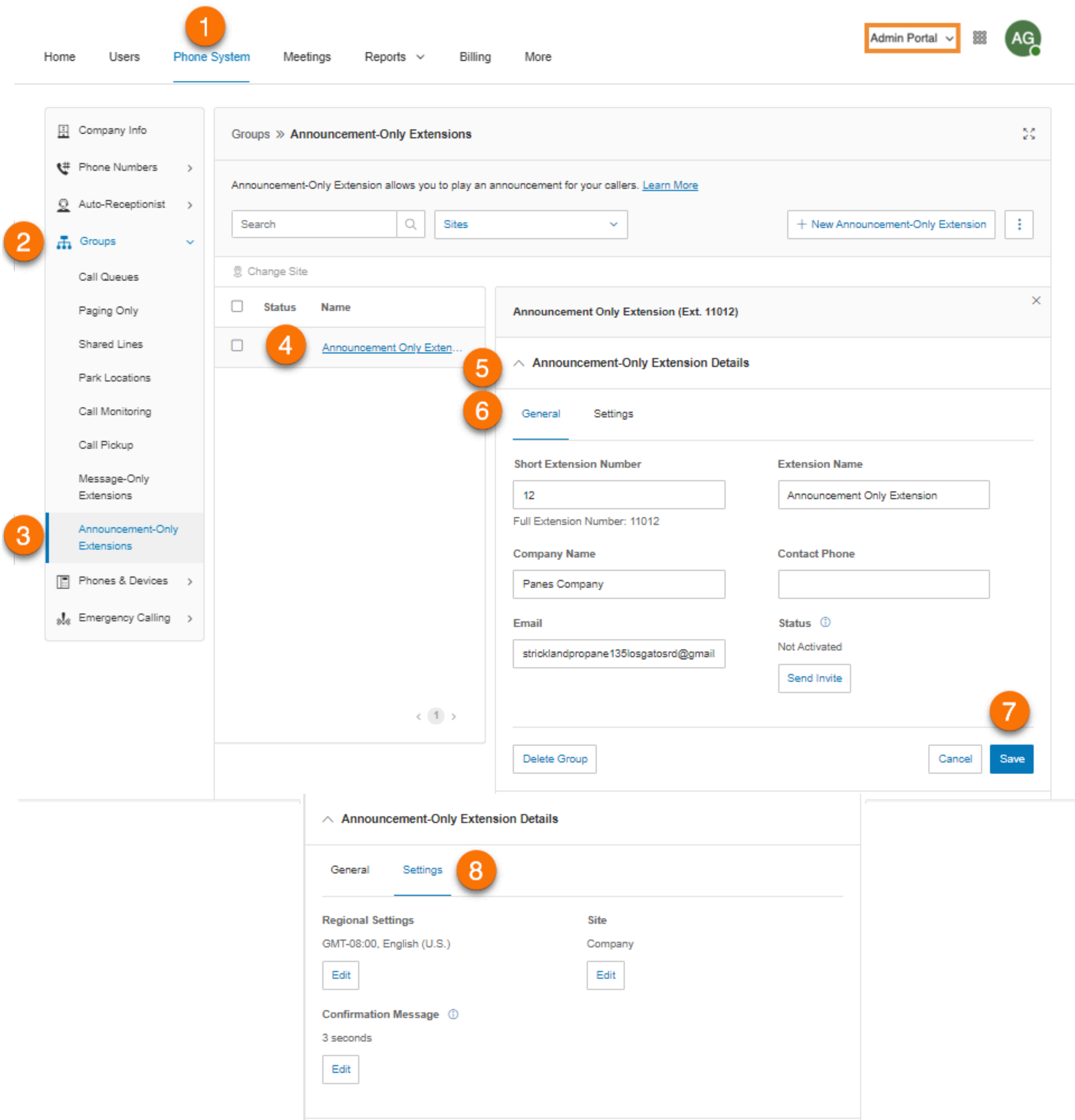
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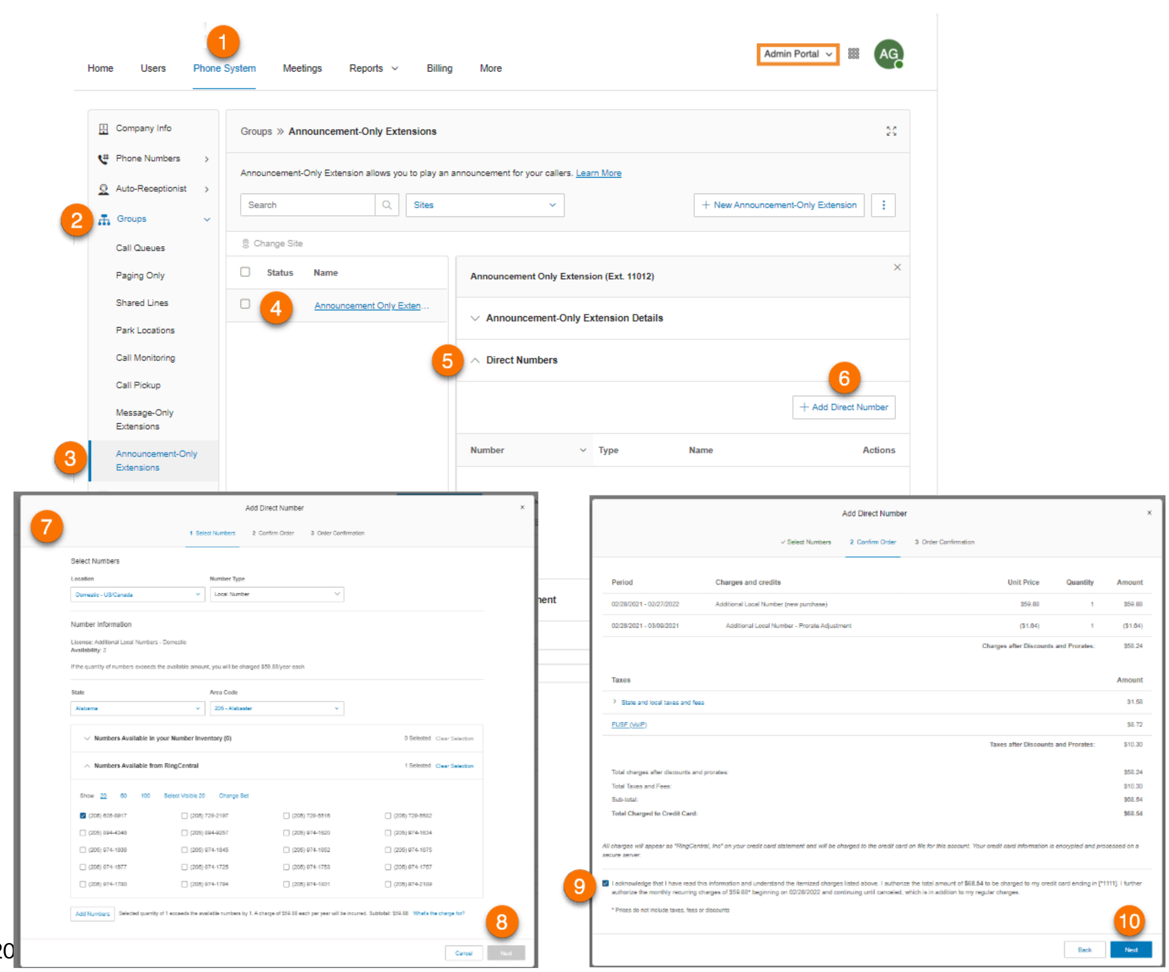
Announcement-Only Extension Details
6
General
Settings
Short Extension Number
12
Full Extension Number: 11012
Extension Name
Announcement Only Extension
Company Name
Panes Company
Contact Phone
Email
stricklandpropane135losgatosrd@gmail
Status
Not Activated
Send Invite
7
Delete Group
Cancel
Save
Announcement-Only Extension Details
General
Settings
8
Regional Settings
GMT-08:00, English (U.S.)
Edit
Site
Company
Edit
Confirmation Message
3 seconds
Edit

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**.



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**.

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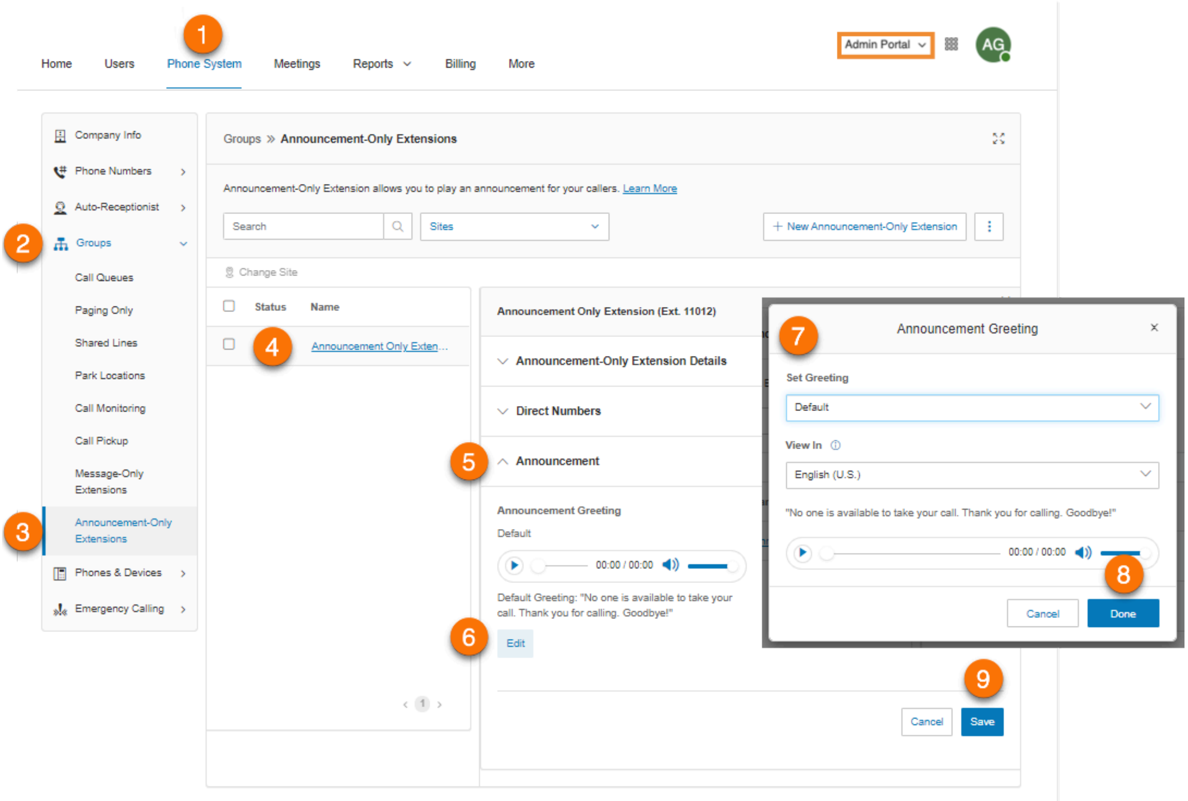

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Limited extensions

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.

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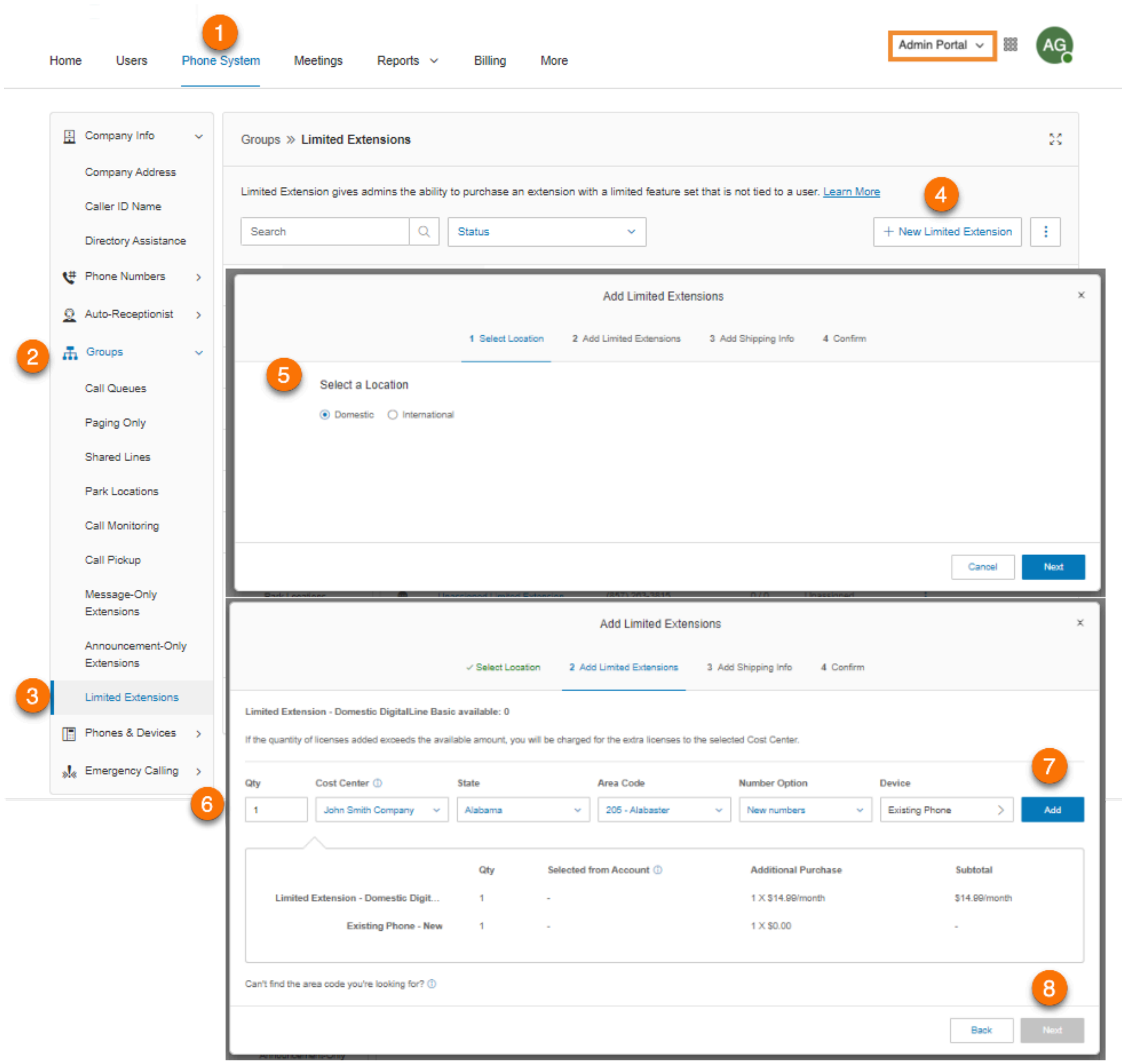

Once the purchase of a limited extension is complete, it will appear in your account with an unassigned status. You can activate unassigned extensions as needed.

Once assigned, a limited extension can be unassigned or reassigned as needed.

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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**.

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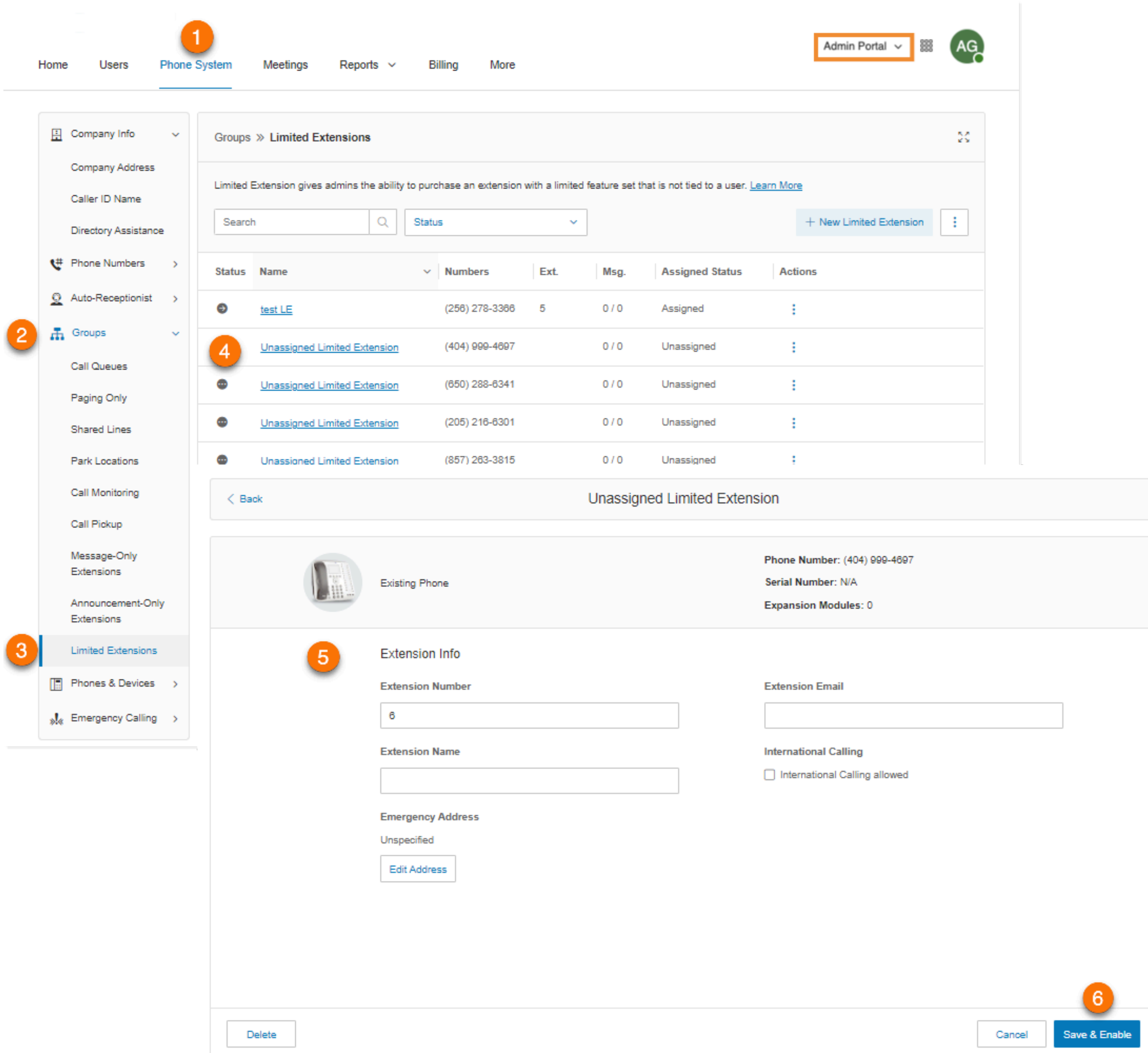

Editing limited extension info

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**

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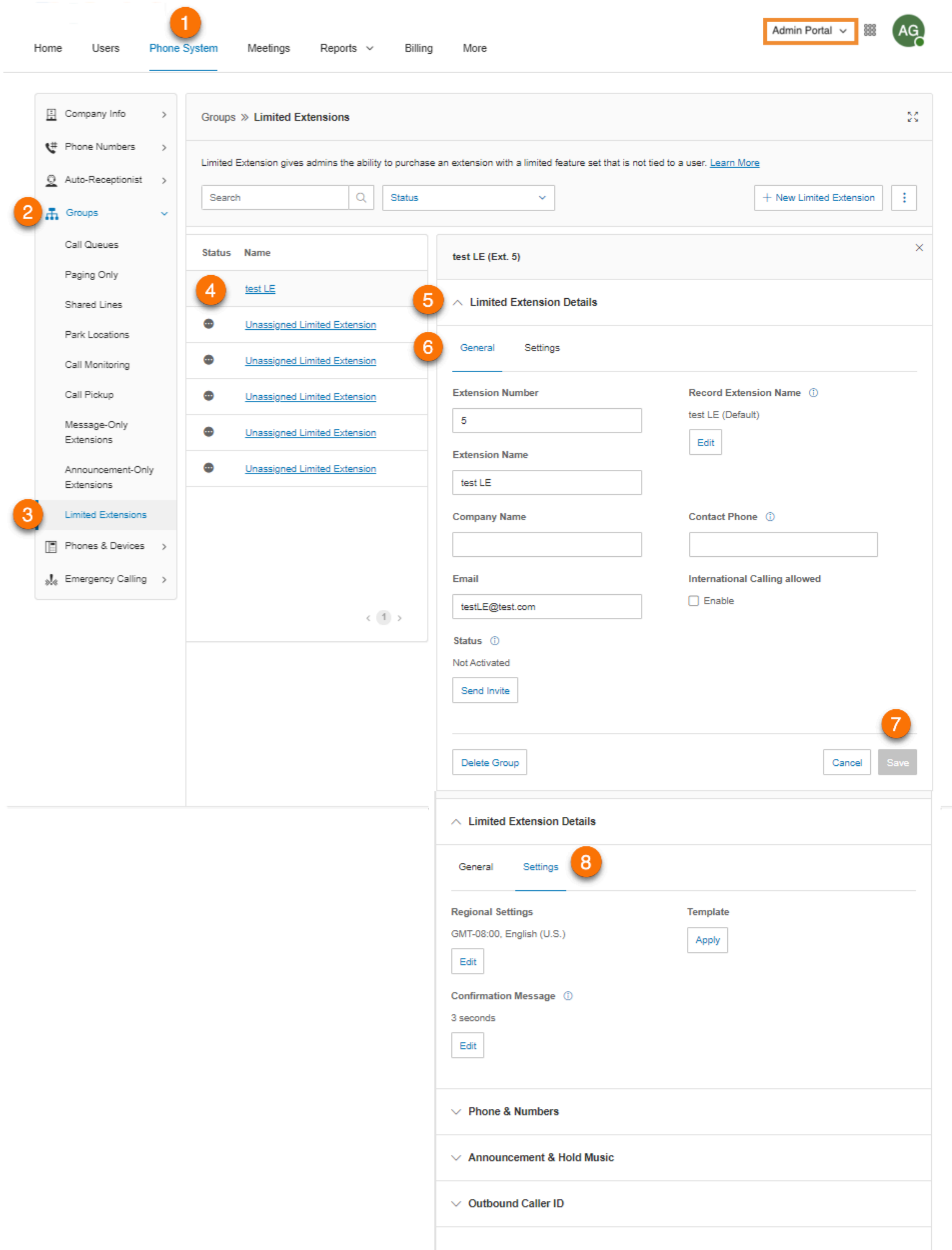
Admin Portal
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Limited Extension gives admins the ability to purchase an extension with a limited feature set that is not tied to a user. Learn More
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test LE
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Unassigned Limited Extension
Unassigned Limited Extension
Unassigned Limited Extension
Unassigned Limited Extension
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test LE (Ext. 5)
Limited Extension Details
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6
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
Limited Extension Details
General
Settings
8
Regional Settings
GMT-08:00, English (U.S.)
Edit
Confirmation Message
3 seconds
Edit
Template
Apply
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**.

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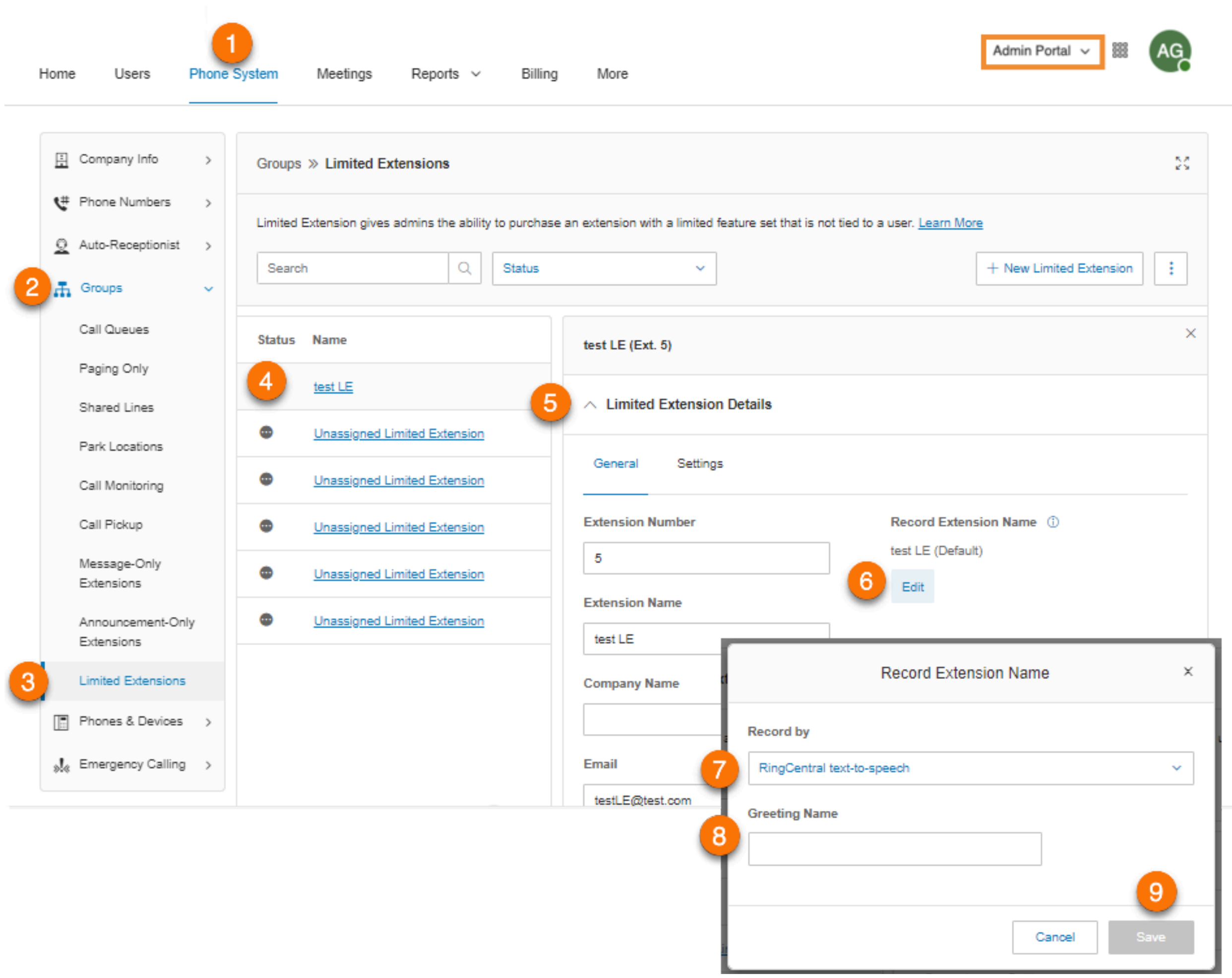
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Unassigned Limited Extension
Unassigned Limited Extension
Unassigned Limited Extension
test LE (Ext. 5)
Limited Extension Details
General
Settings
Extension Number
5
Record Extension Name
test LE (Default)
Edit
Extension Name
test LE
Company Name
Email
testLE@test.com
Record Extension Name
Record by
RingCentral text-to-speech
Greeting Name
Cancel
Save
1
2
3
4
5
6
7
8
9

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.

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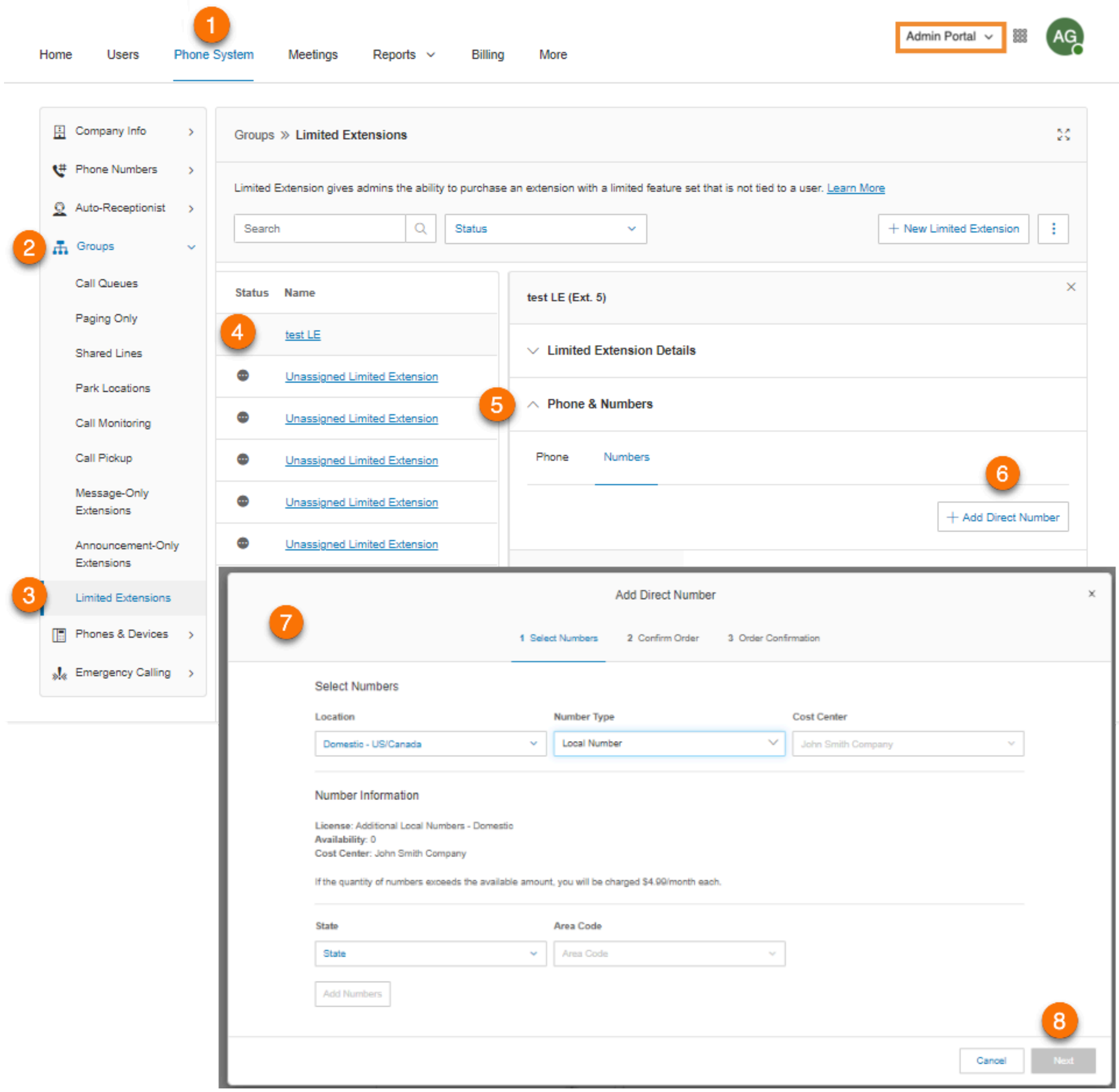
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Phone & Numbers
Phone
Numbers
Add Direct Number
Add Direct Number
1 Select Numbers
2 Confirm Order
3 Order Confirmation
Select Numbers
Location
Number Type
Cost Center
Domestic - US/Canada
Local Number
John Smith Company
Number Information
License: Additional Local Numbers - Domestic
Availability: 0
Cost Center: John Smith Company
If the quantity of numbers exceeds the available amount, you will be charged $4.99/month each.
State
Area Code
State
Area Code
Add Numbers
Cancel
Next
1
2
3
4
5
6
7
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**.

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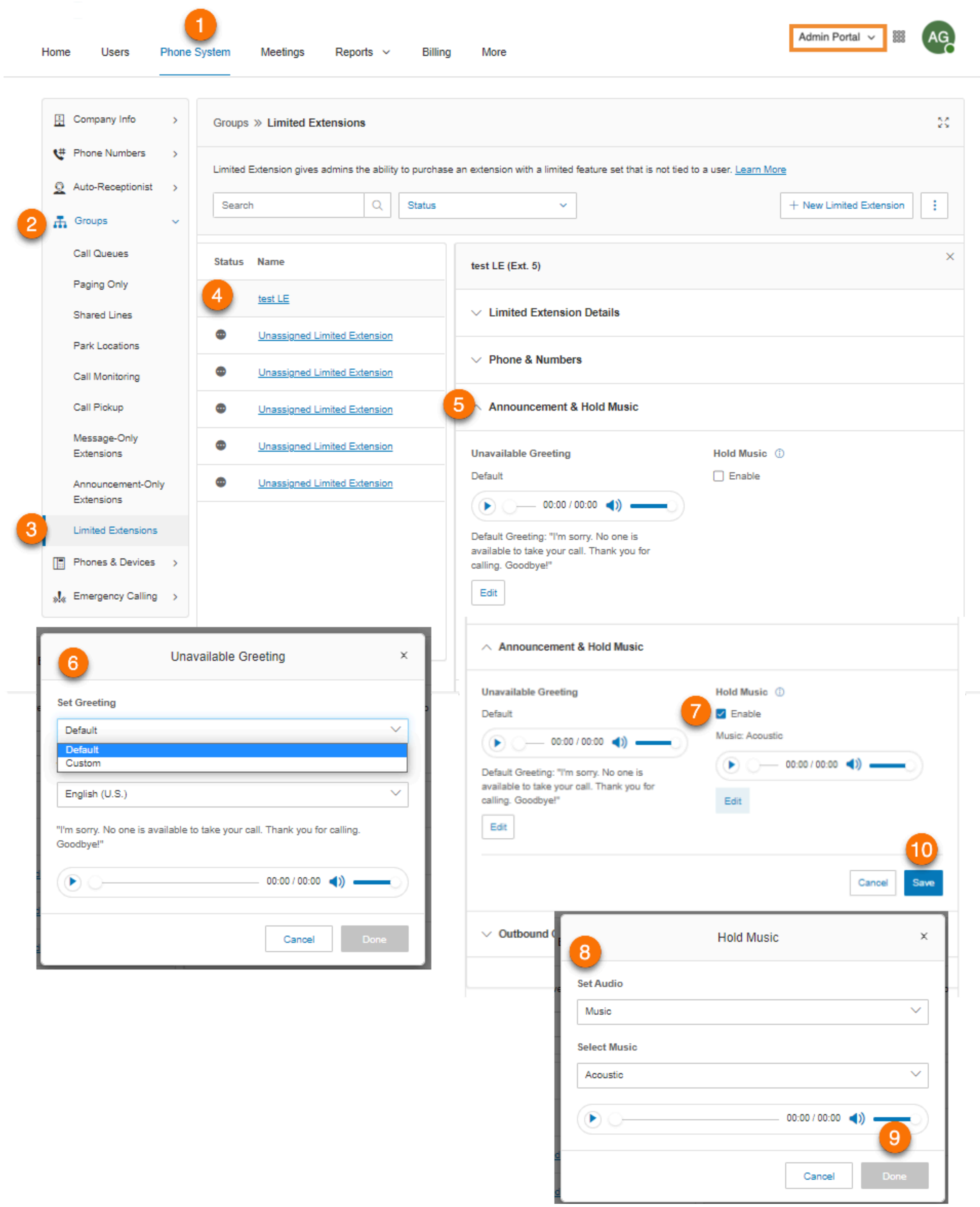

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Setting outbound caller ID

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**.

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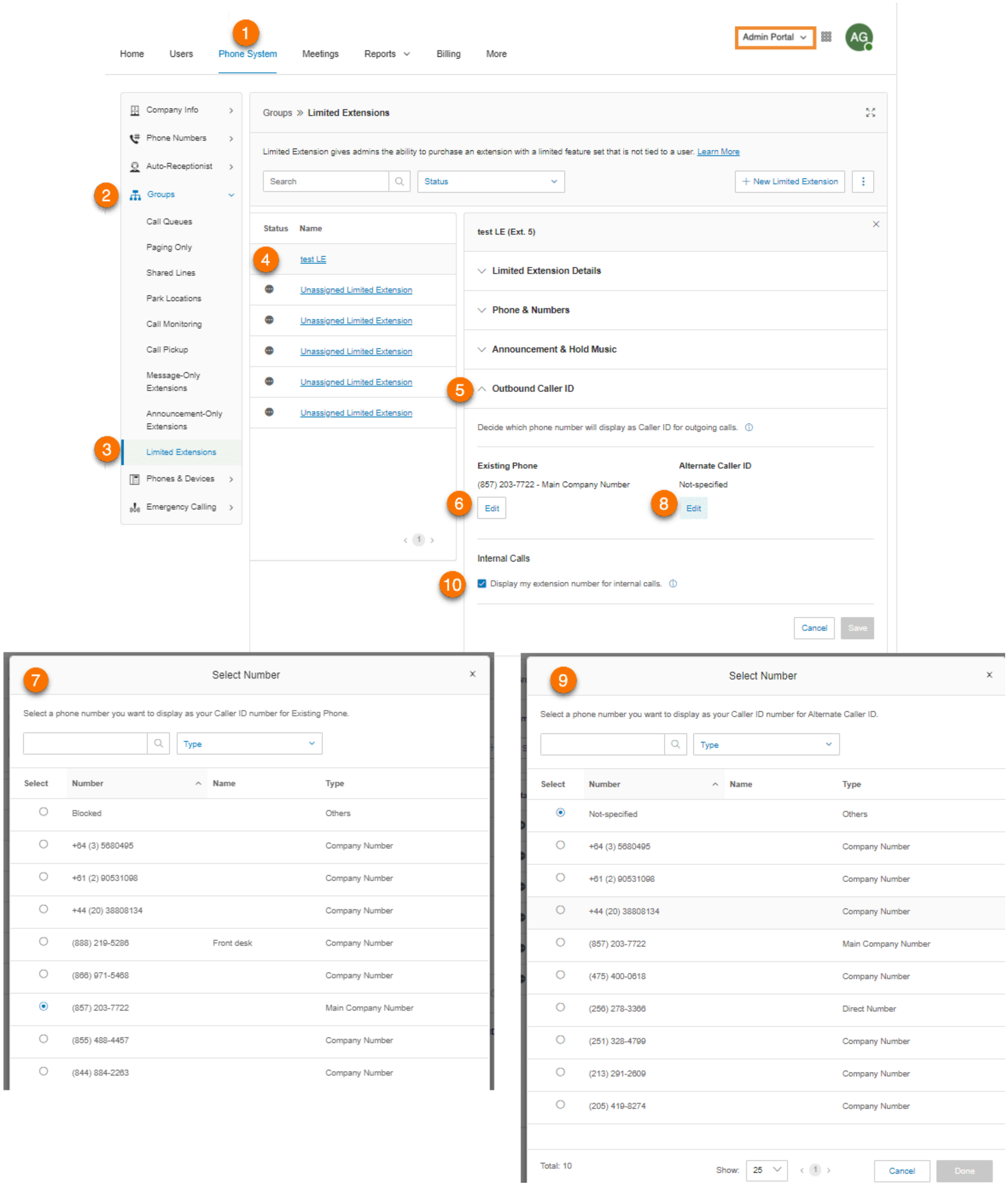
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Limited Extension gives admins the ability to purchase an extension with a limited feature set that is not tied to a user. Learn More
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Unassigned Limited Extension
Unassigned Limited Extension
Unassigned Limited Extension
Unassigned Limited Extension
test LE (Ext. 5)
Limited Extension Details
Phone & Numbers
Announcement & Hold Music
Outbound Caller ID
Decide which phone number will display as Caller ID for outgoing calls.
Existing Phone
(857) 203-7722 - Main Company Number
Edit
Alternate Caller ID
Not-specified
Edit
Internal Calls
Display my extension number for internal calls.
Cancel
Save
Select Number
Select a phone number you want to display as your Caller ID number for Existing Phone.
Type
Select
Number
Name
Type
Blocked
Others
+64 (3) 5680495
Company Number
+61 (2) 90531098
Company Number
+44 (20) 38808134
Company Number
(888) 219-5286
Front desk
Company Number
(866) 971-5468
Company Number
(857) 203-7722
Main Company Number
(855) 488-4457
Company Number
(844) 884-2263
Company Number
Select Number
Select a phone number you want to display as your Caller ID number for Alternate Caller ID.
Type
Select
Number
Name
Type
Not-specified
Others
+64 (3) 5680495
Company Number
+61 (2) 90531098
Company Number
+44 (20) 38808134
Company Number
(857) 203-7722
Main Company Number
(475) 400-0618
Company Number
(256) 278-3366
Direct Number
(251) 328-4799
Company Number
(213) 291-2609
Company Number
(205) 419-8274
Company Number
Total: 10
Show:
25
Cancel
Done
1
2
3
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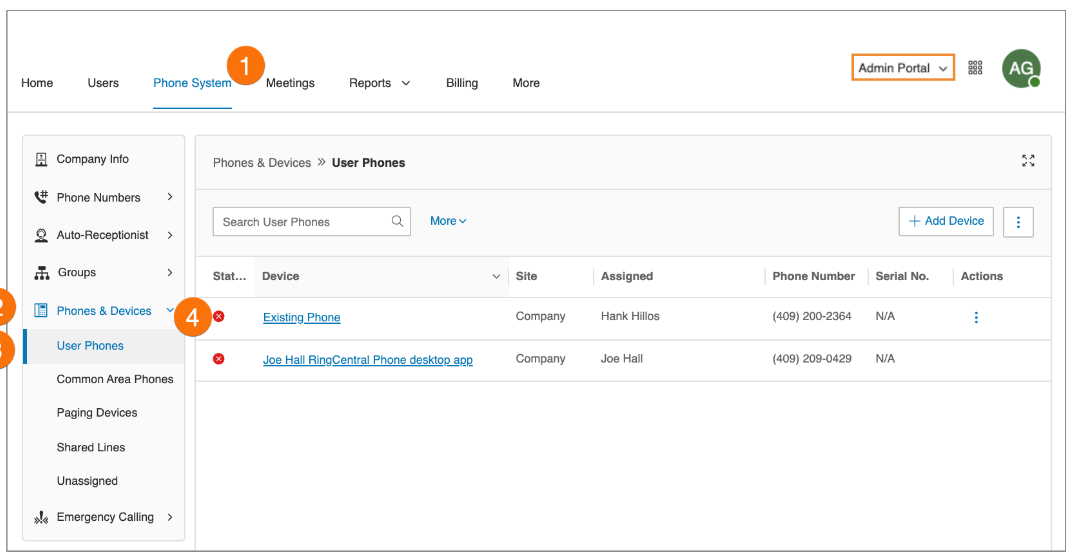
9
10

Phones and Devices

This section provides you a view of all phones that are associated with your RingCentral RingEX 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.



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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.

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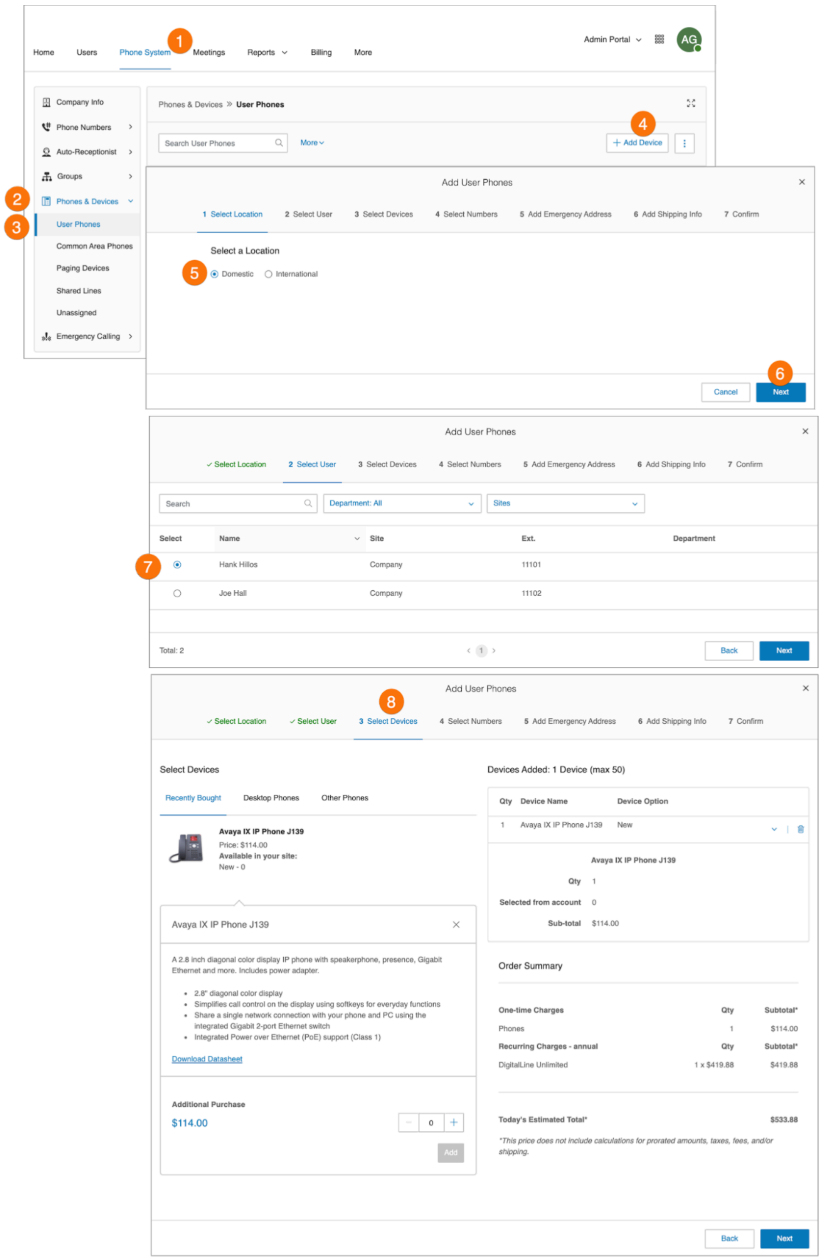
Home
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Groups
Phones & Devices
User Phones
Common Area Phones
Paging Devices
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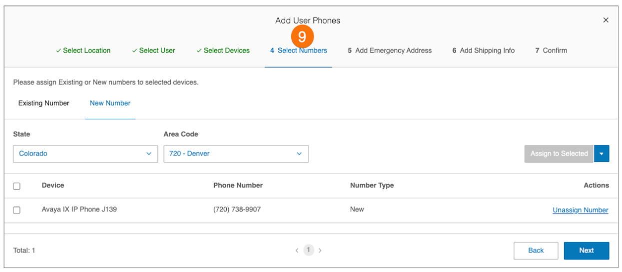
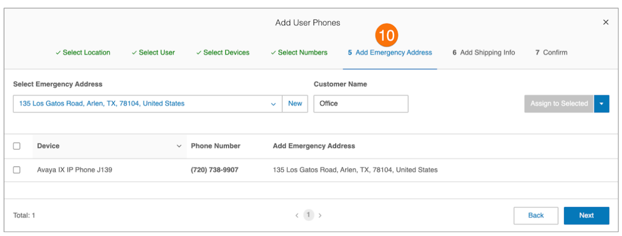
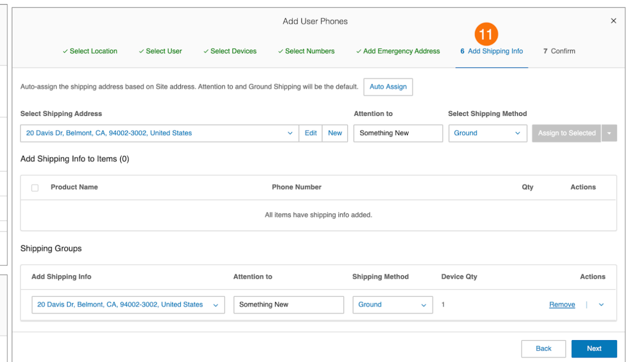
Phones & Devices » User Phones
Search User Phones
More
+ Add Device
Add User Phones
1 Select Location
2 Select User
3 Select Devices
4 Select Numbers
5 Add Emergency Address
6 Add Shipping Info
7 Confirm
Select a Location
Domestic
International
Cancel
Next
Search
Department: All
Sites
Select
Name
Site
Ext.
Department
Hank Hillos
Company
11101
Joe Hall
Company
11102
Total: 2
Back
Next
Select Devices
Recently Bought
Desktop Phones
Other Phones
Avaya IX IP Phone J139
Price: $114.00
Available in your site:
New - 0
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
Add
Devices Added: 1 Device (max 50)
Qty
Device Name
Device Option
Avaya IX IP Phone J139
New
Selected from account
Sub-total
Order Summary
One-time Charges
Subtotal*
Phones
Recurring Charges - annual
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.

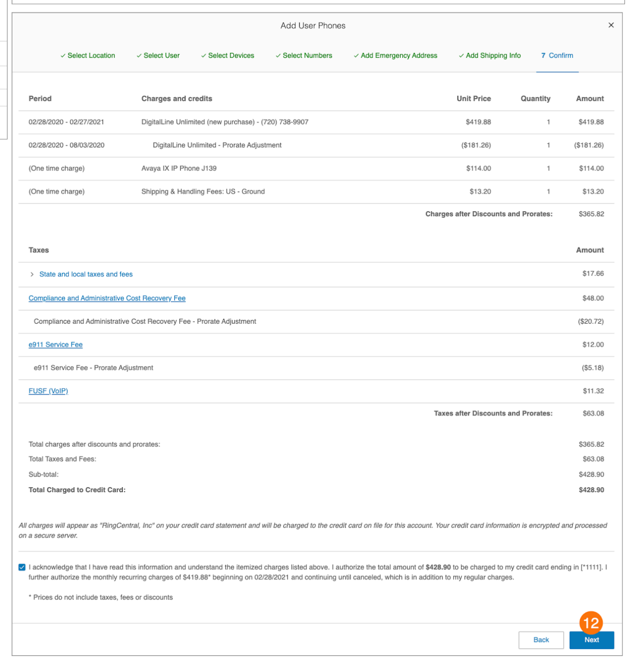
9. Assign an existing or a new number to the device and click **Next**.
10. Add an emergency address and click **Next**.
11. Select your shipping preferences and click **Next**.
12. Confirm your order by checking the acknowledgment box. Click **Next**.

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.





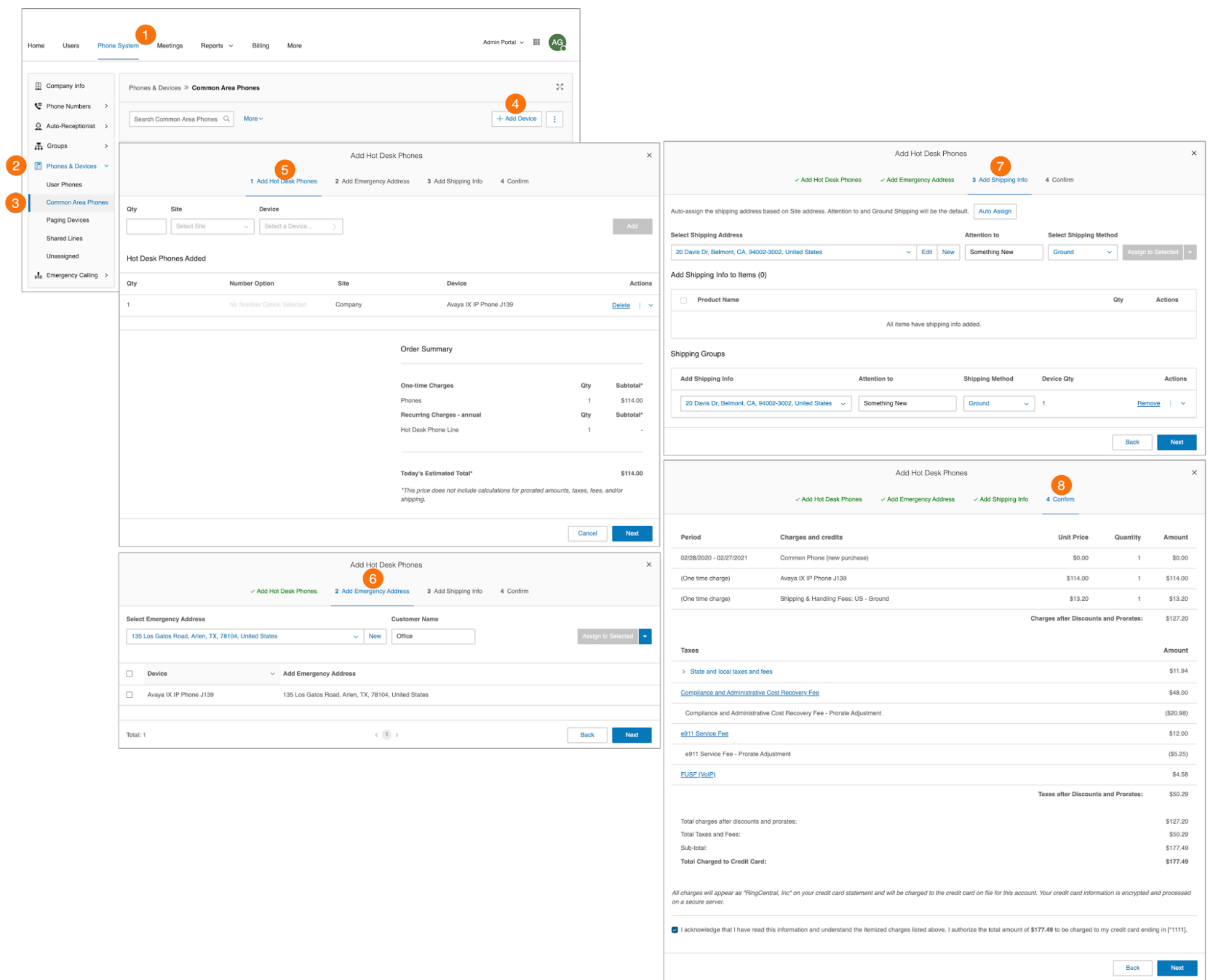




Adding a common area phone

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**.



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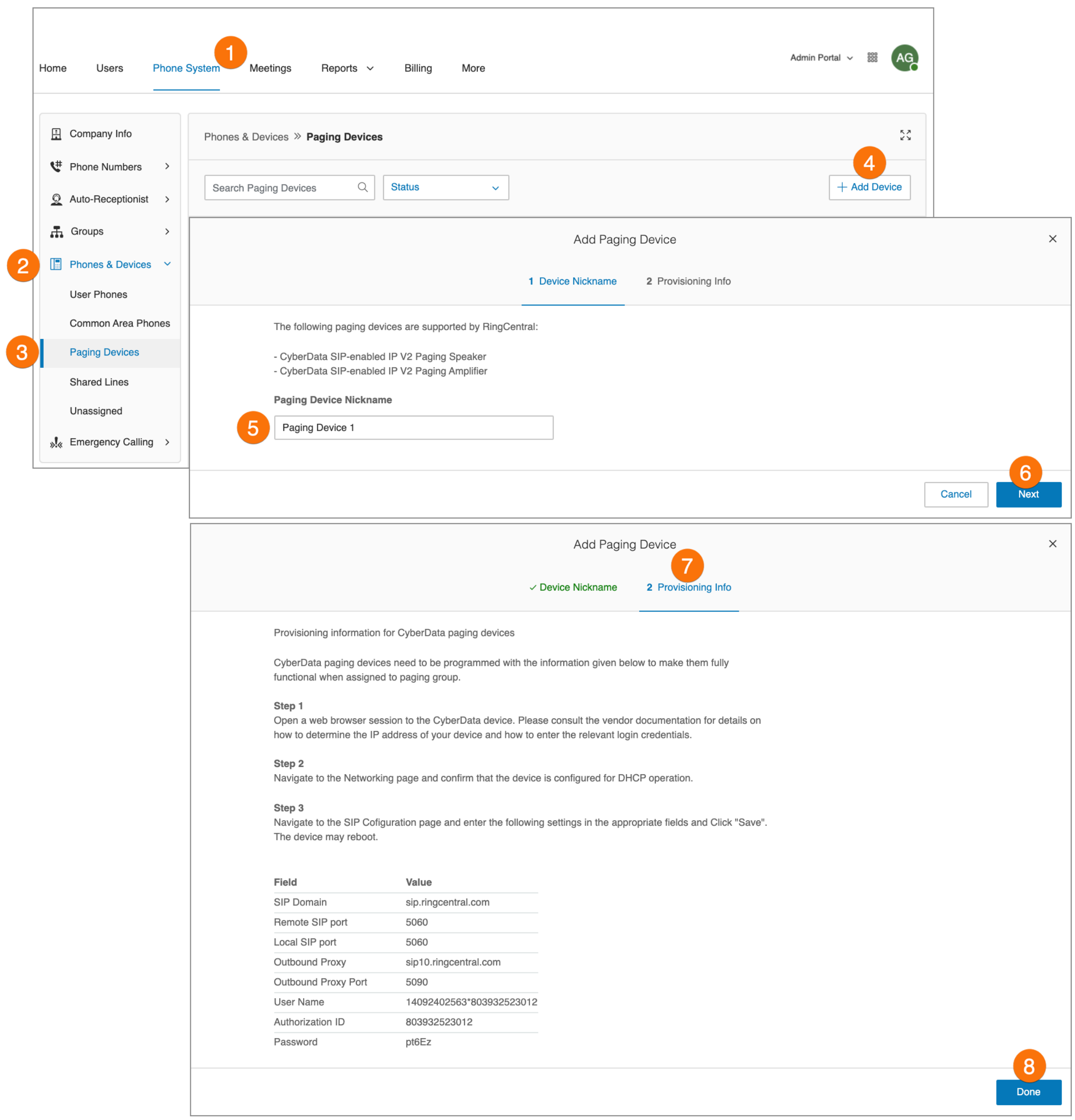
Adding a paging device

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.



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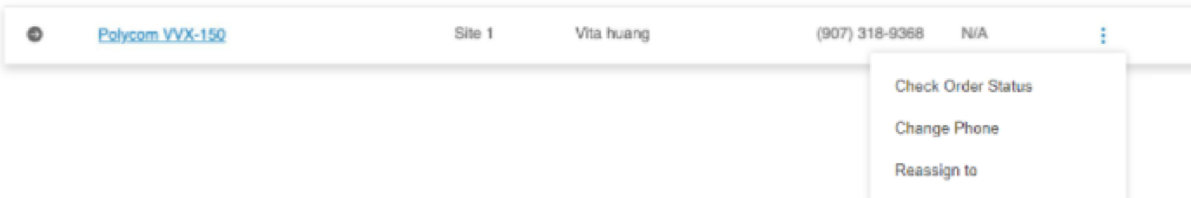
Changing a phone

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.

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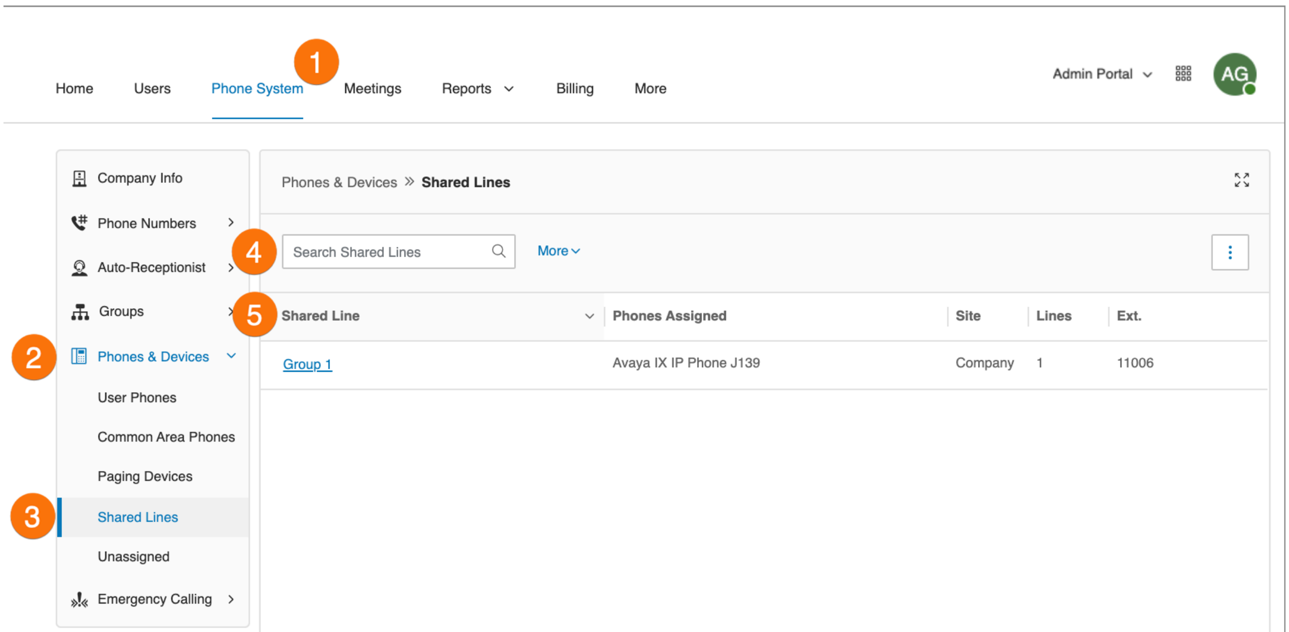
Viewing shared lines

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**.



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**.

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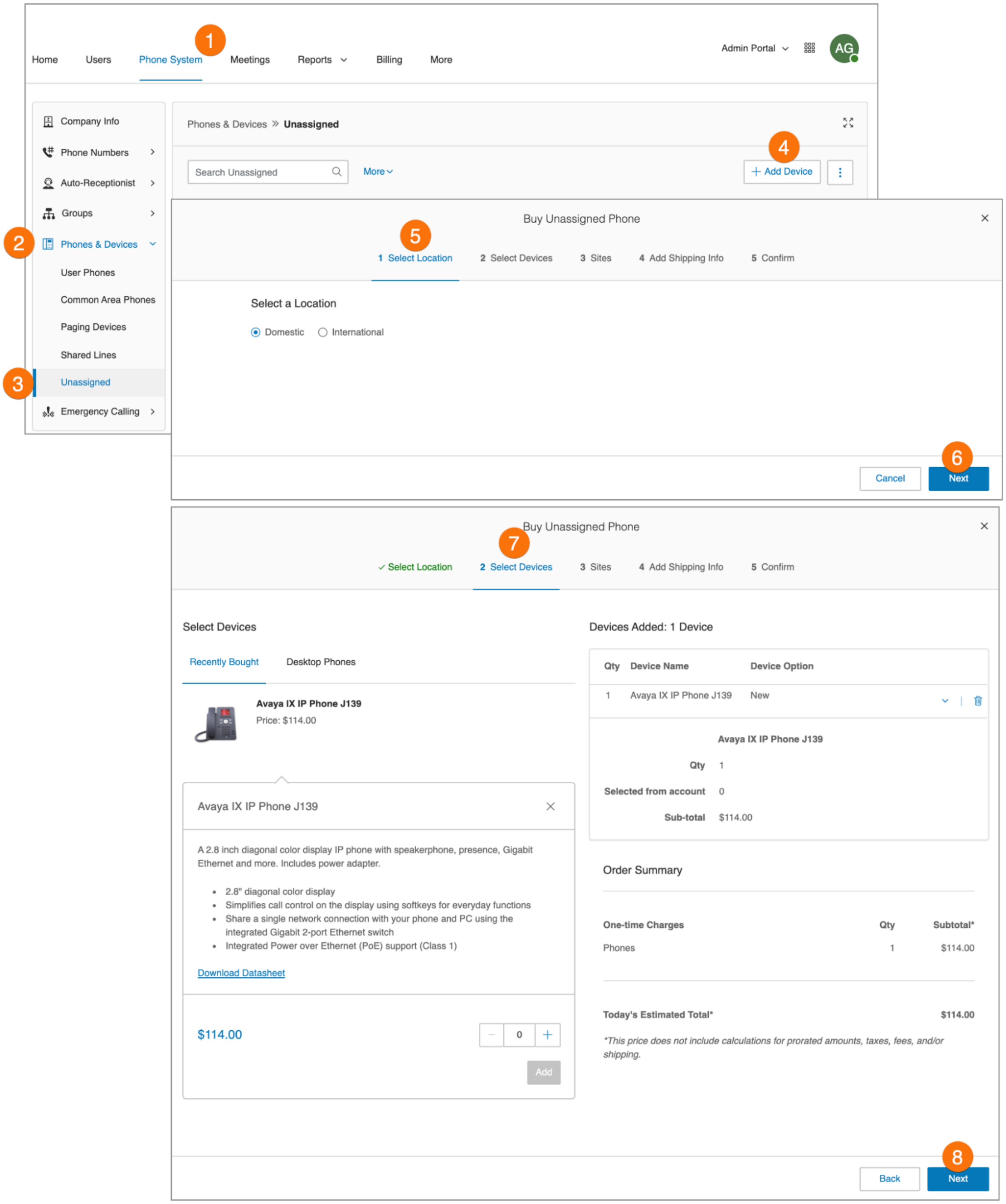

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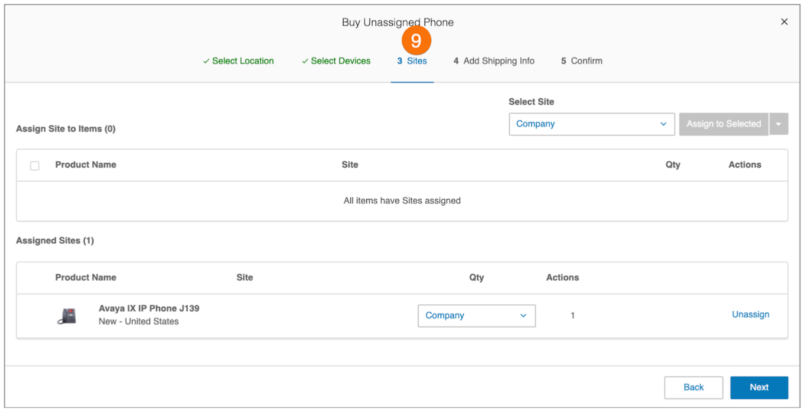
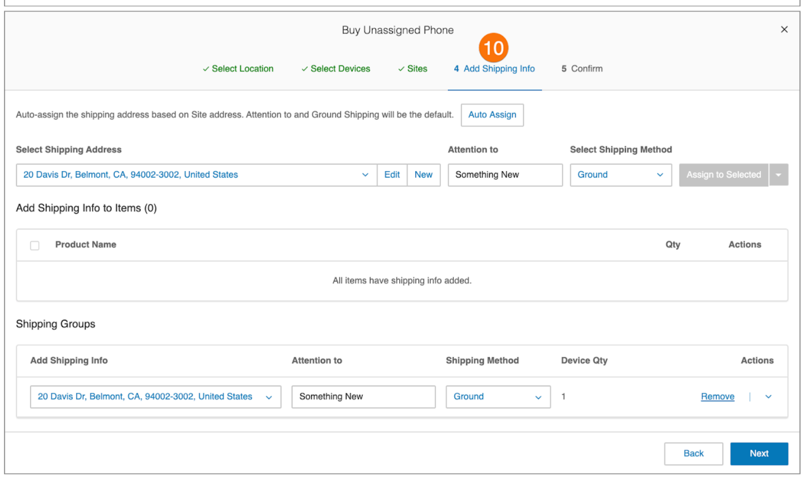
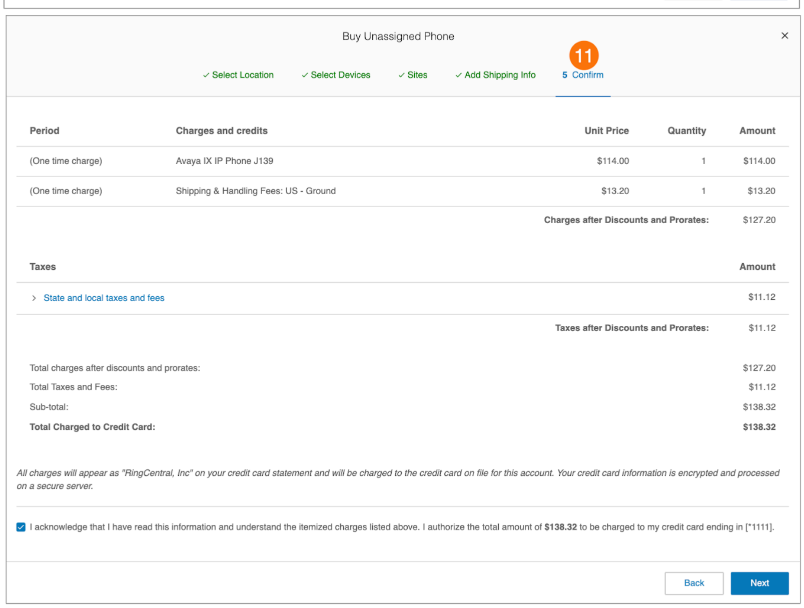
9. Select your shipping preferences and click **Next**.
10. Confirm your order by checking the acknowledgment box and click **Next**.







Enabling video calls

You can enable video on internal point-to-point calls in your RingCentral RingEX 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 RingEX account.

Redundant audio (RED) codec for calls

A codec defines how your voice and video is compressed into packets that are sent over the Internet. There are many types of codecs designed for different environments and network conditions (e.g. wifi vs cellular, good vs weak connection, low vs high packet loss). A RED codec adds duplicate voice and video information to the packets sent over the Internet which helps maintain call quality during poor network conditions.

The Redundant Audio Codec is supported on RC App Desktop & RC App Mobile clients, version 22.4.10 or later.

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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.

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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 RingEX 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.

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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.

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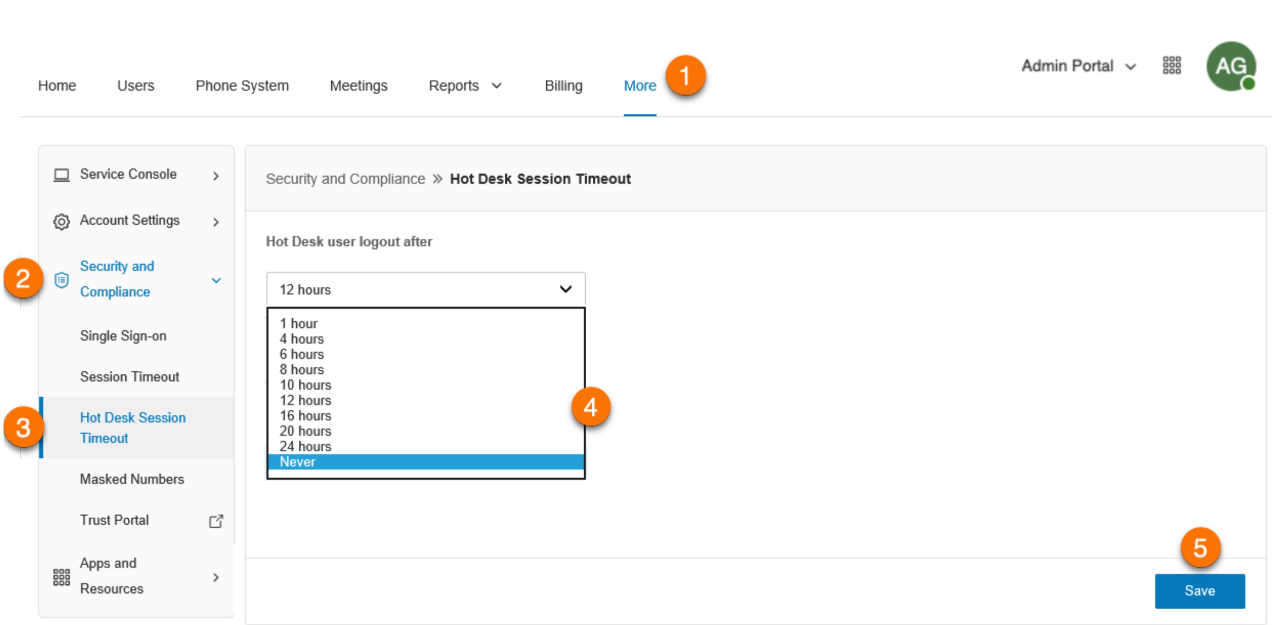
Setting the hot desking session timeout

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**.



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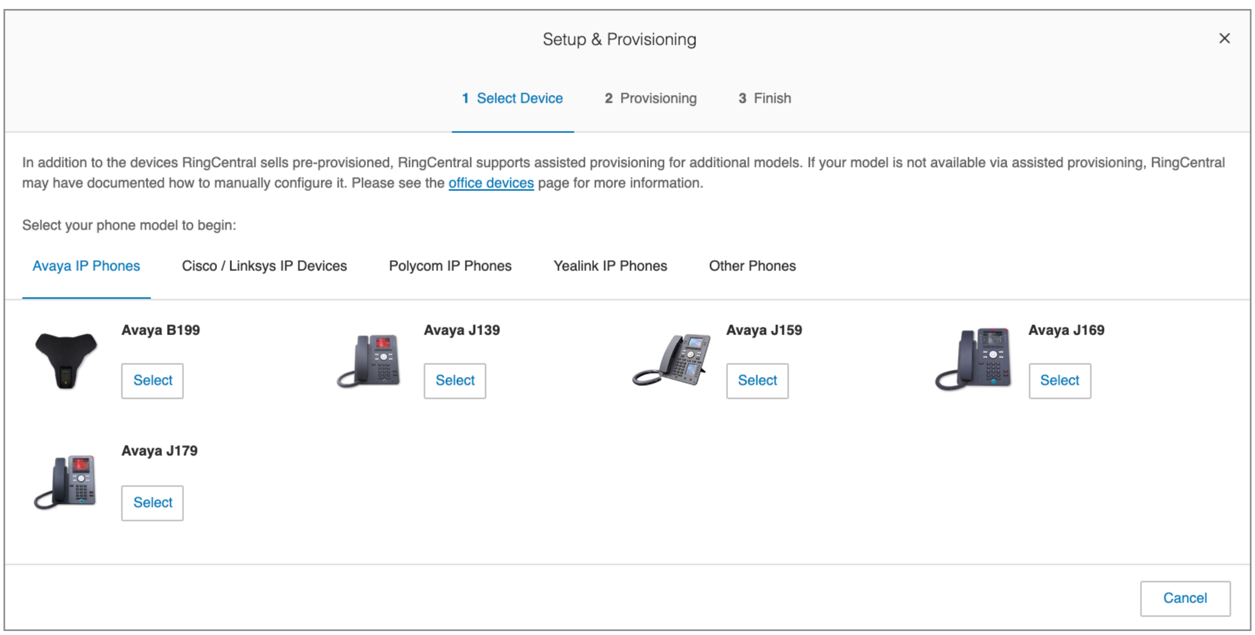
Assisted provisioning

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.



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Automatic Location Updates

RingCentral RingEX 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.

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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**.

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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**.

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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.

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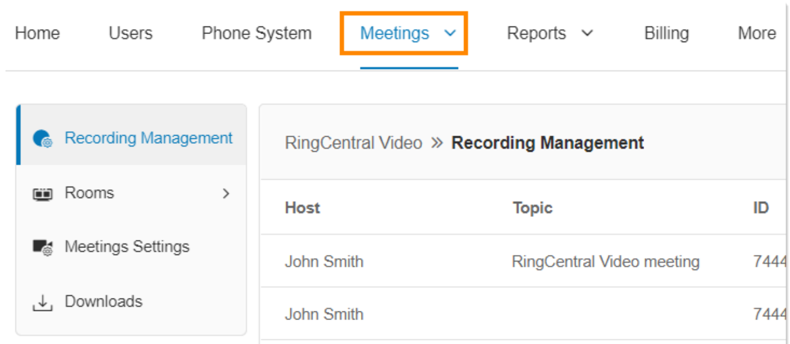
Meetings

The **Meetings** tab is where you can see information and configure the settings related to your meetings. Here, you can see the following tabs:

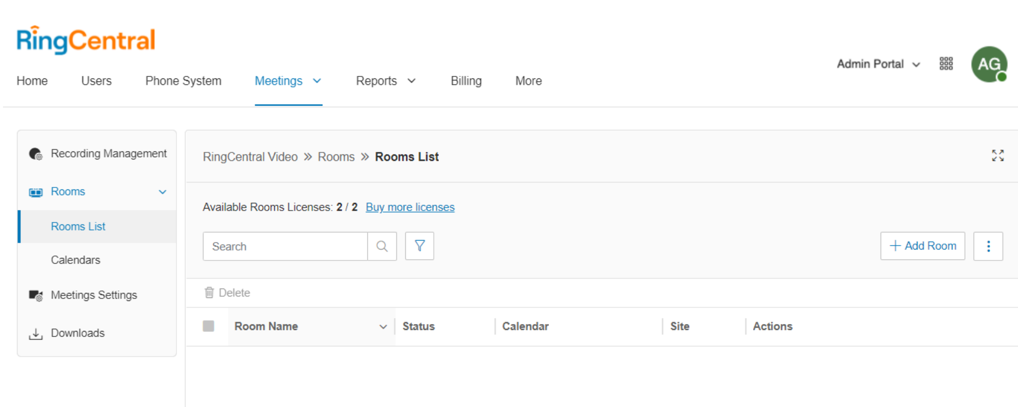
- Recording Management
- Rooms
- Meetings Settings
- Downloads



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.



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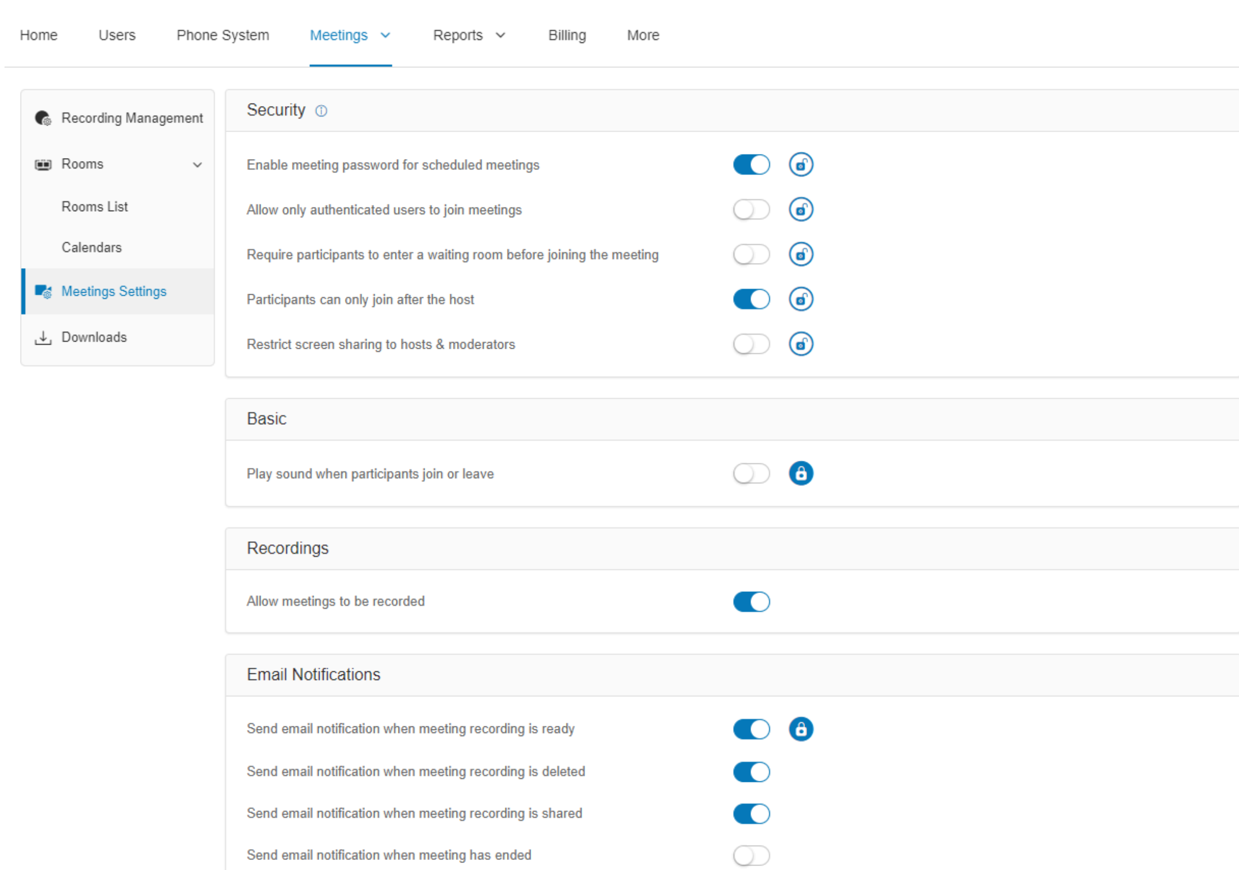
Managing Meetings settings

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**



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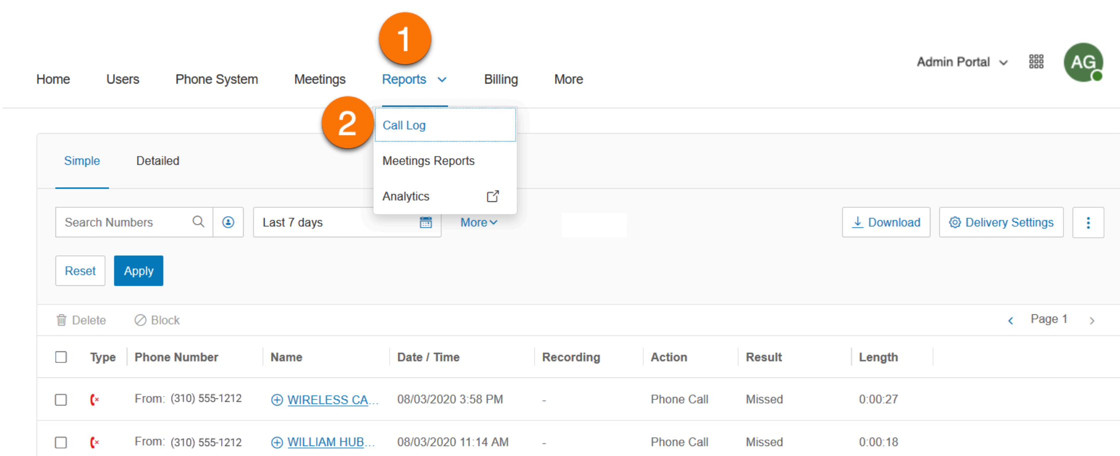
Call log reports

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**.



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.

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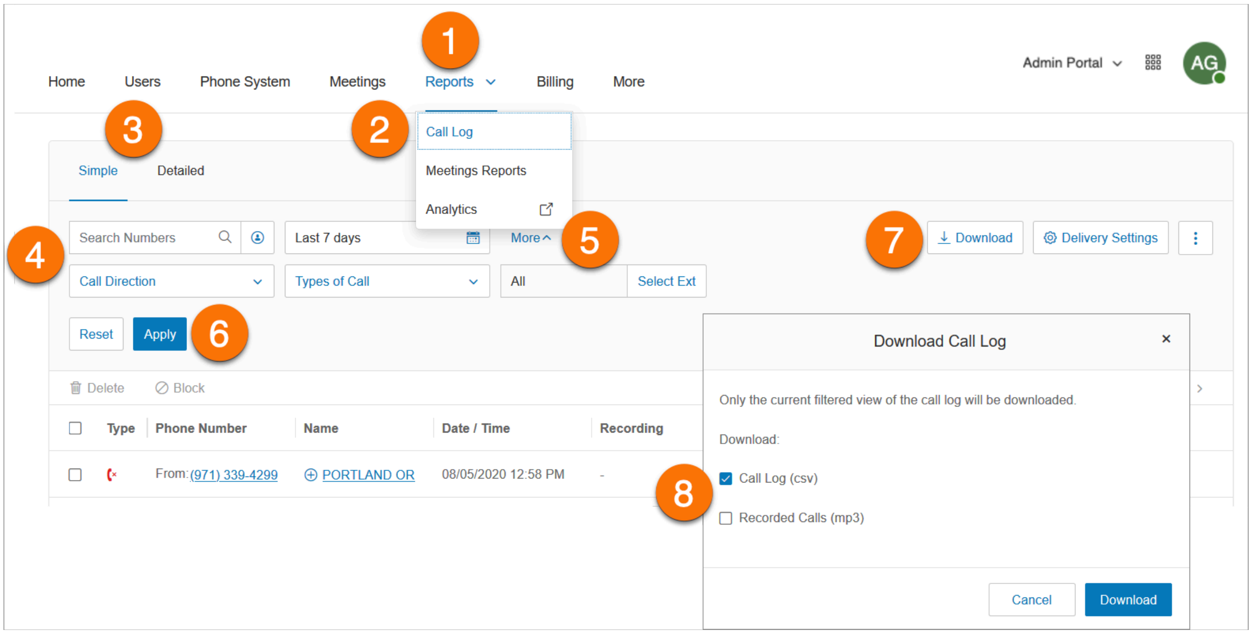
Home
Users
Phone System
Meetings
Reports
Billing
More
Admin Portal
AG
1
2
3
Call Log
Meetings Reports
Analytics
Simple
Detailed
4
Search Numbers
Last 7 days
More
5
7
Download
Delivery Settings
Call Direction
Types of Call
All
Select Ext
Reset
Apply
6
Download Call Log
Delete
Block
Only the current filtered view of the call log will be downloaded.
Type
Phone Number
Name
Date / Time
Recording
Download:
From: (971) 339-4299
PORTLAND OR
08/05/2020 12:58 PM
8
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

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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:

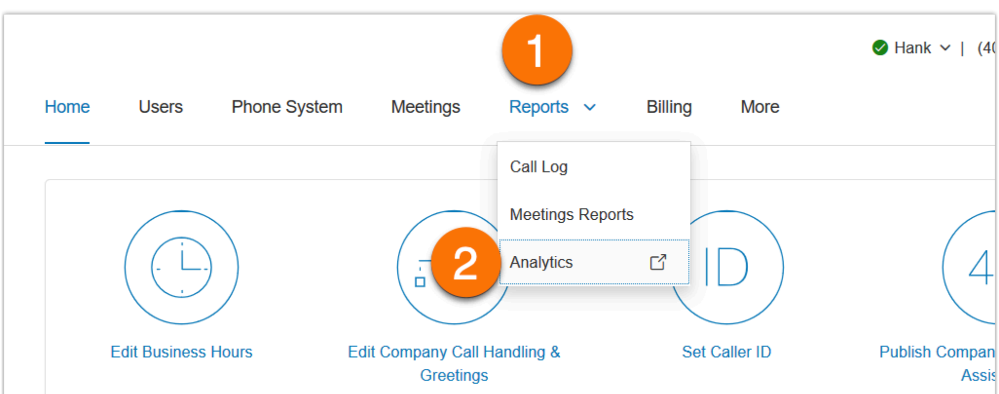
- if, and how, RingCentral products are being used (at the organizational level or across sites and departments)
- determining the power users
- trends and patterns of usage
- who are the low users/non-users
- which locations/departments could benefit from a training session
- user preferences such as preferred devices
- most used endpoints, etc.

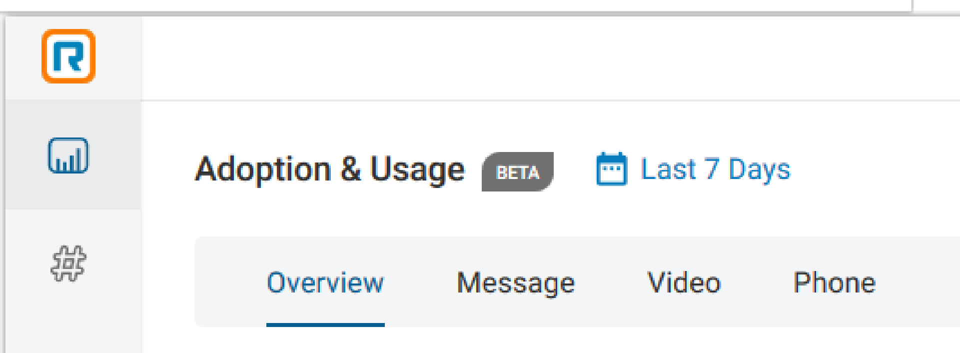
To access:

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





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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.

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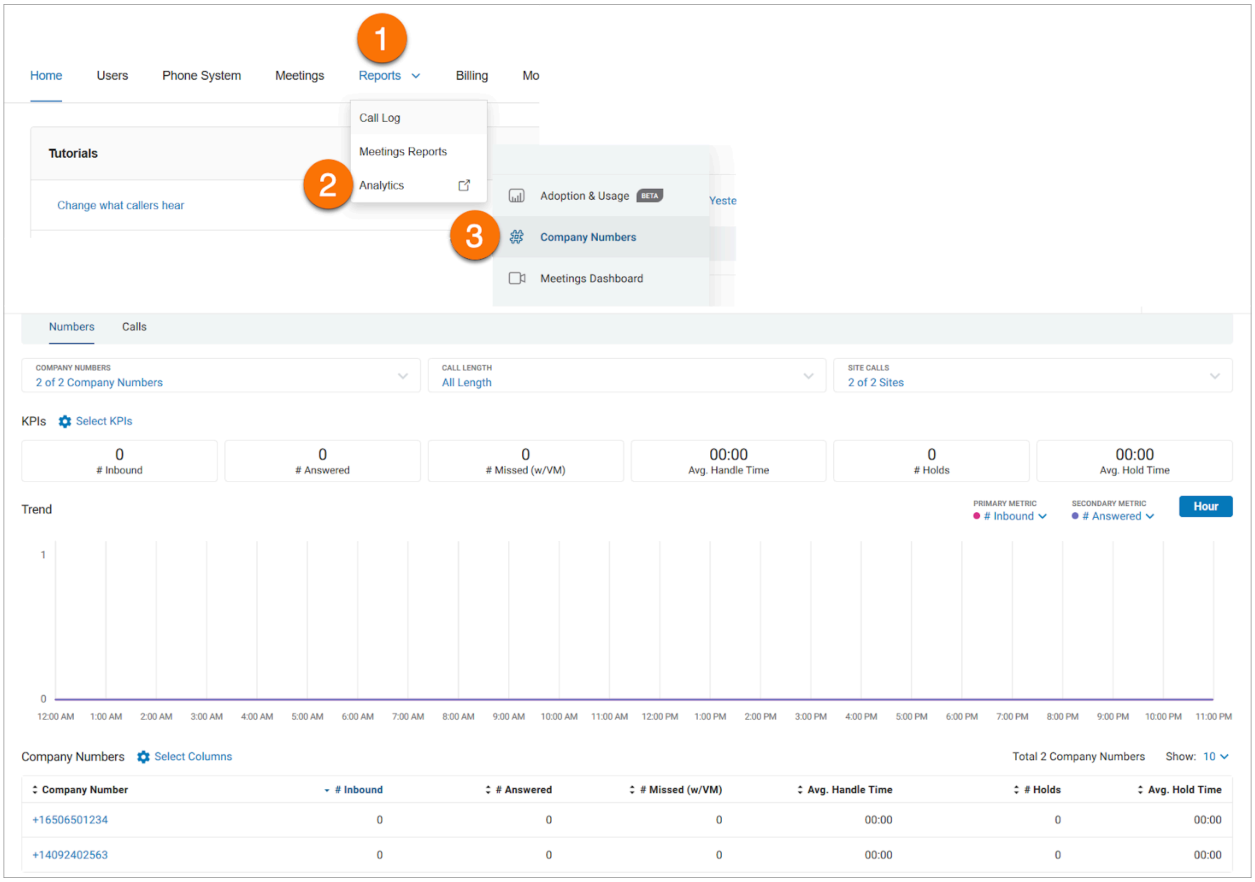

Performance reports

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

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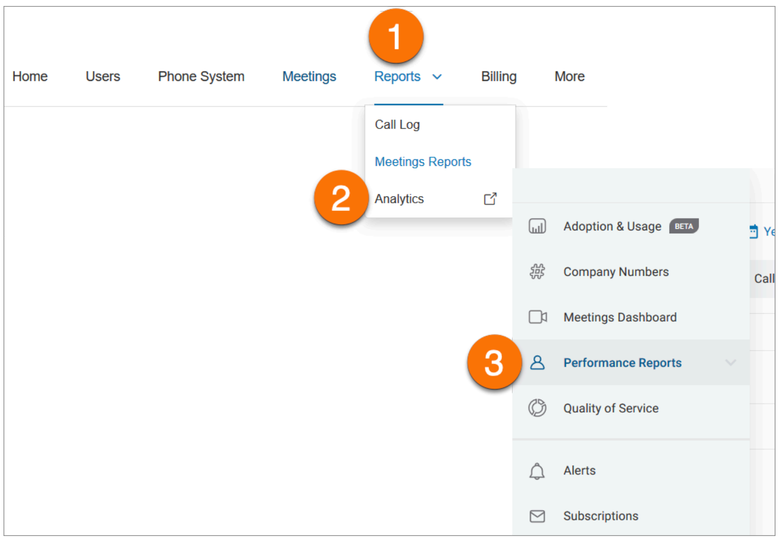
- **Users:** User performance in the context of inbound and outbound calls for the call segment that is relevant to each user. If User Groups are in use (Ultimate and Premium plans), only users from queues and defined user groups are available for monitoring
- **Calls**: Lists the breakdown of the call 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**.



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Quality of Service reports

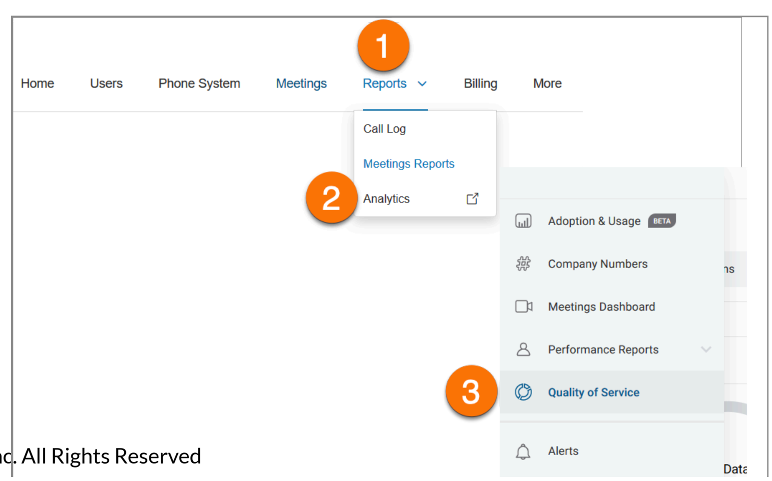
The Quality of Service reports provide near real-time information on the global health of the account and RingCentral Video and allows for proactive monitoring and reactive troubleshooting of potential issues. It gives you the ability to anticipate and diagnose call quality issues impacting your users 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.



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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.

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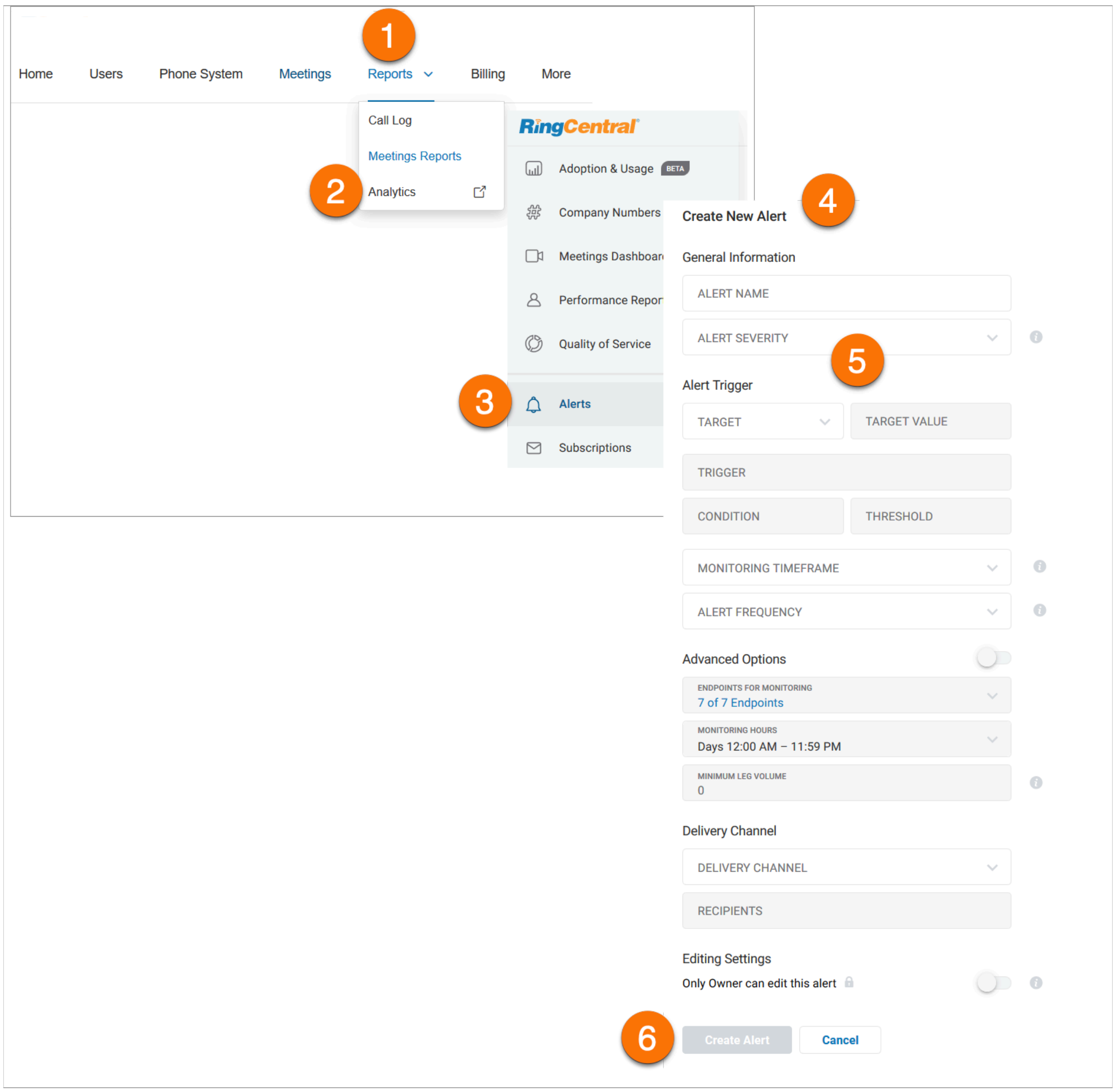
c. **Advanced Options**: Monitor your specific endpoints, day of the week, time of the day, or over a minimum call leg volume.

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**.



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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

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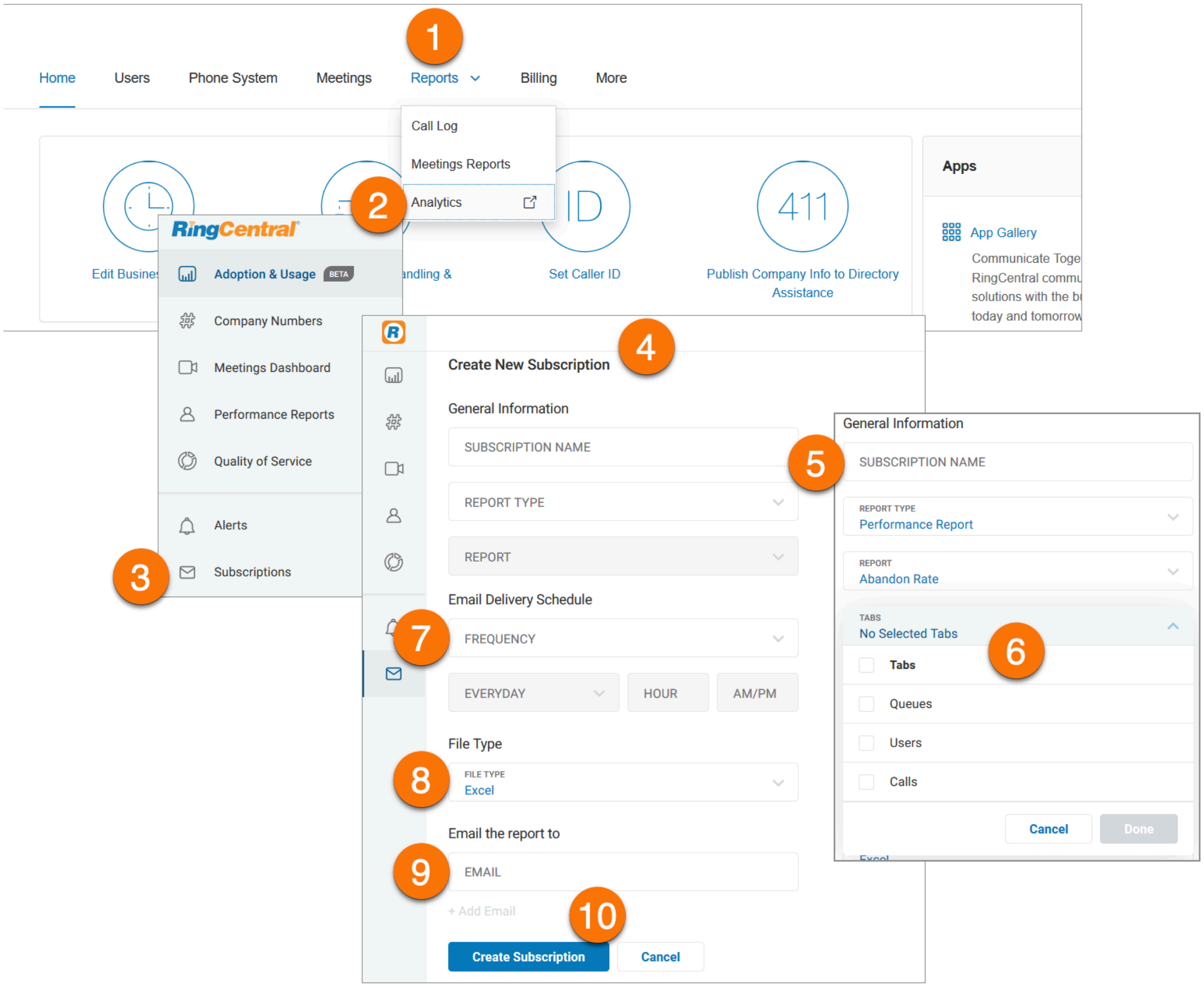
Report has exclusive permissions to see, edit, and delete the subscription. No other user will have access to the subscription.



Billing

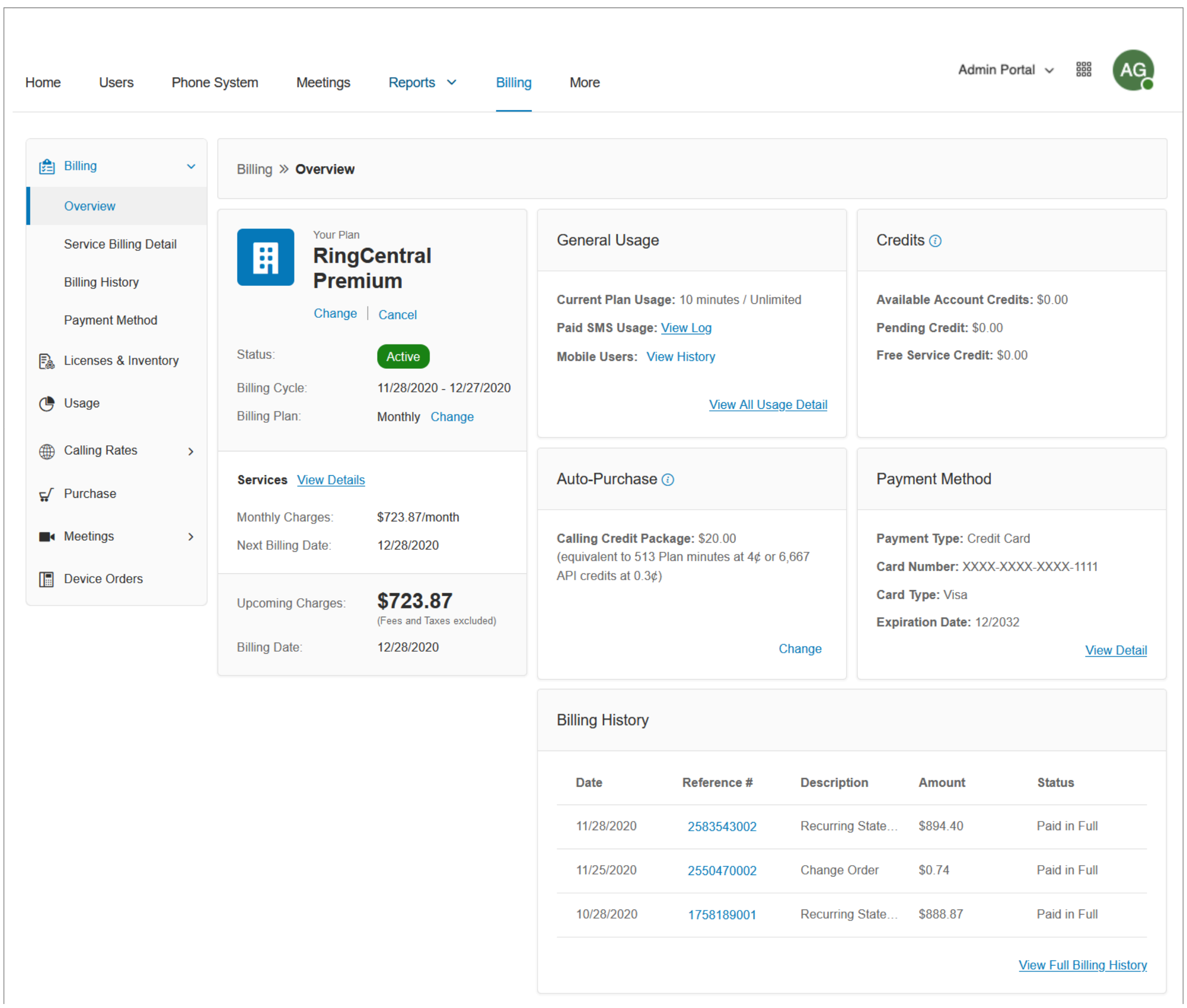
The Billing tab leads to menus for managing your Usage, Calling Rates, Meetings (including licenses), and Device Orders. View and edit your service plan, payment information, international calling plans, and cost center codes here.

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

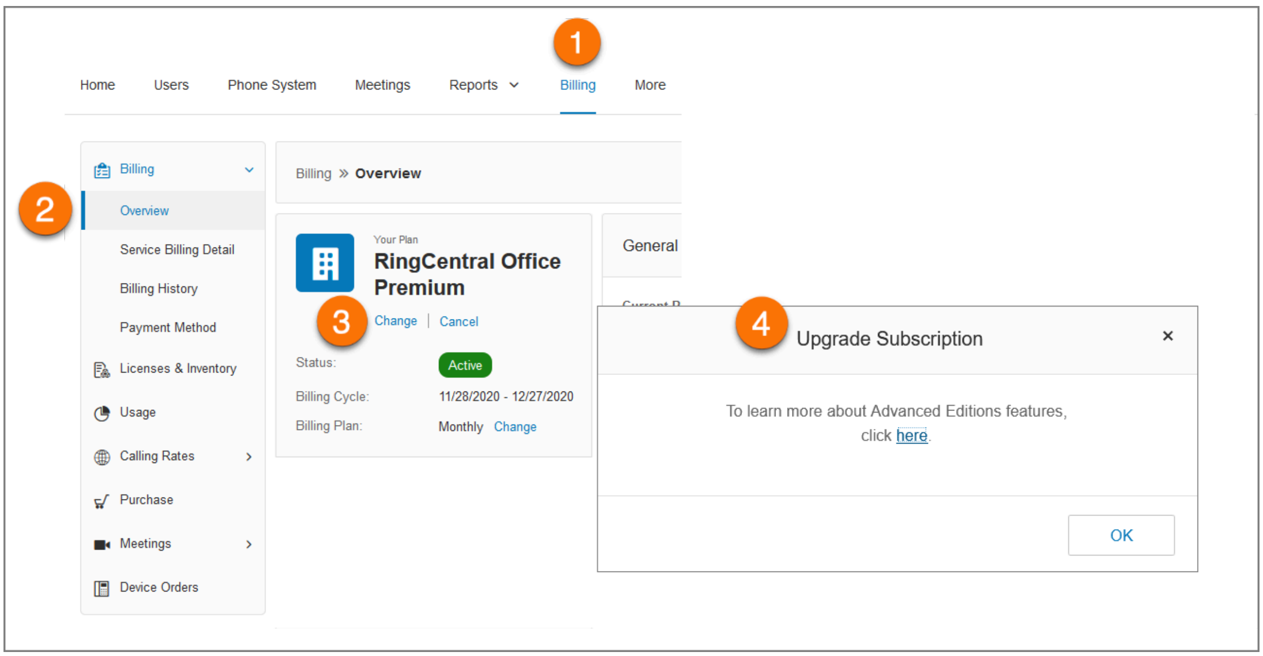
The Overview page of the Billing tab contains information about your service plan, additional services, and payment information. This is the landing page of the Billing tab.



Managing your service plan

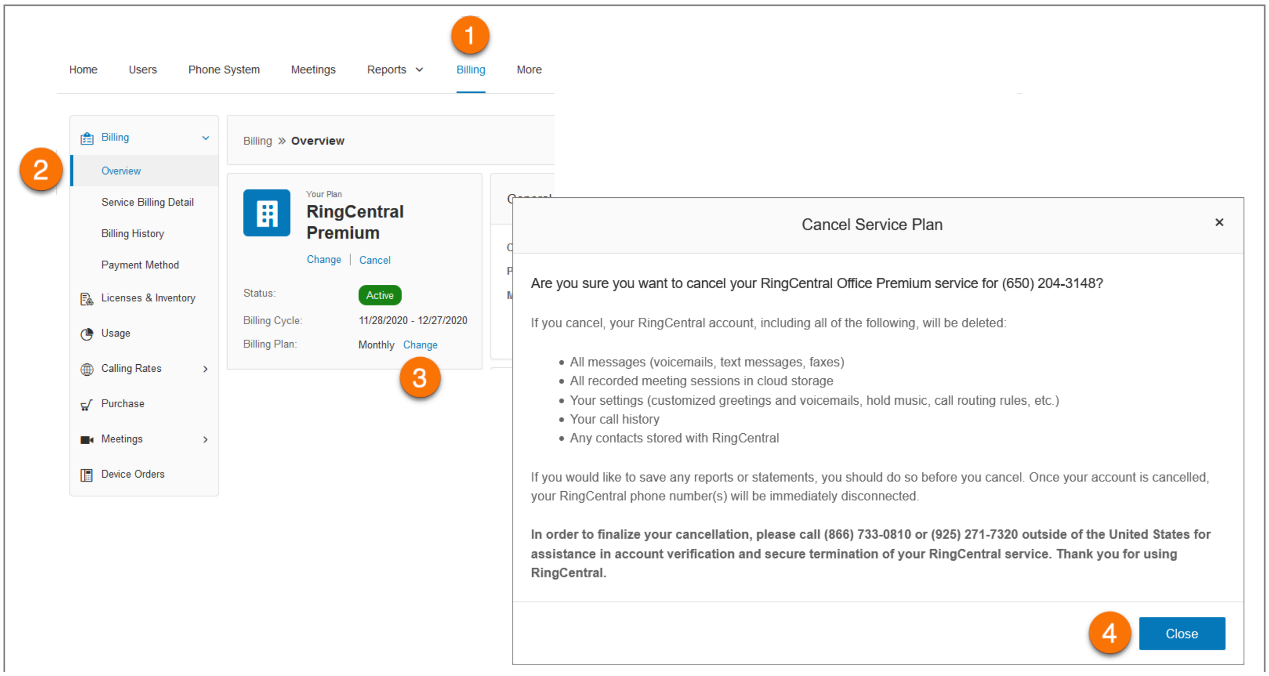
Viewing/changing service plan

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**.



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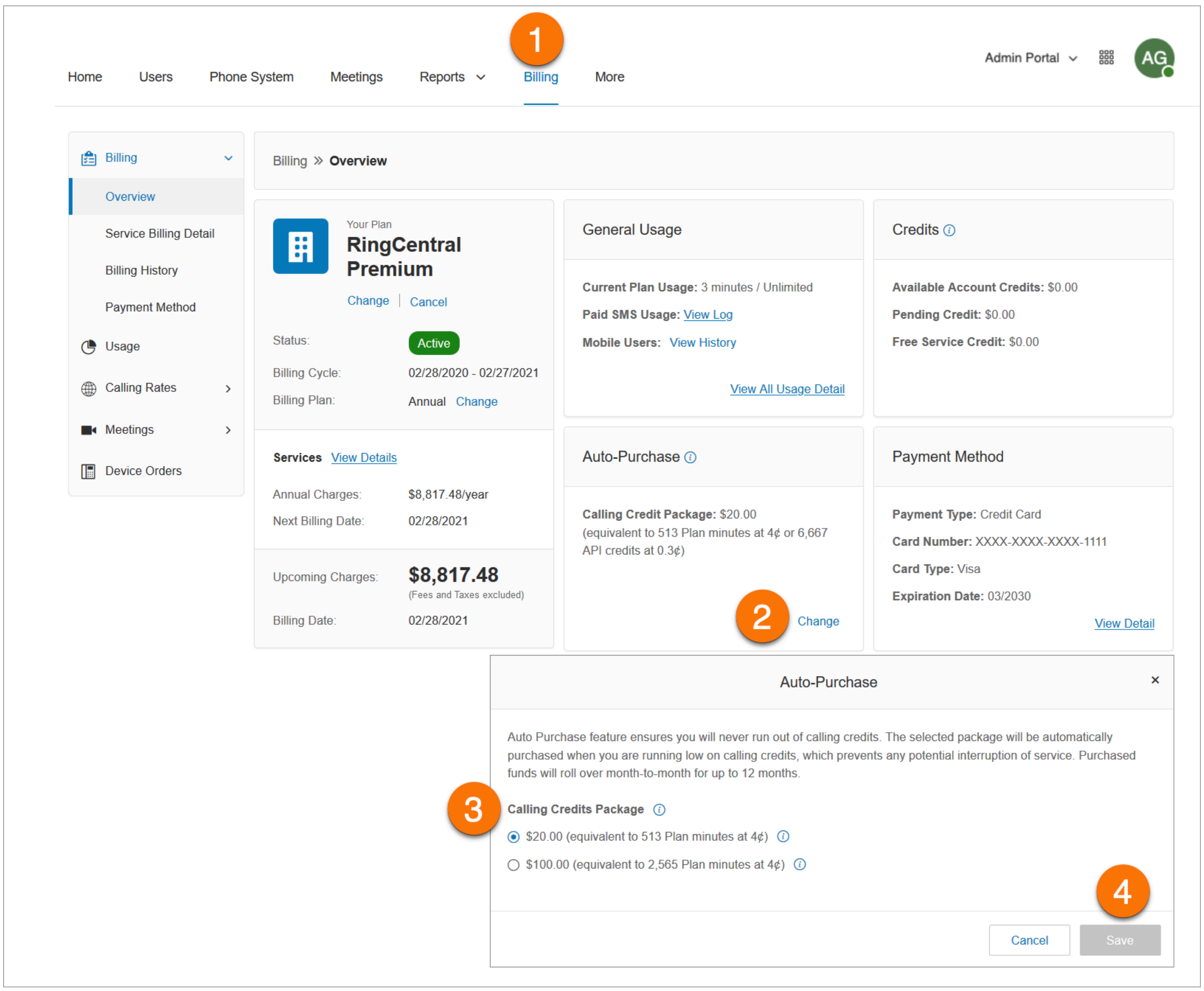
Using auto purchase

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:

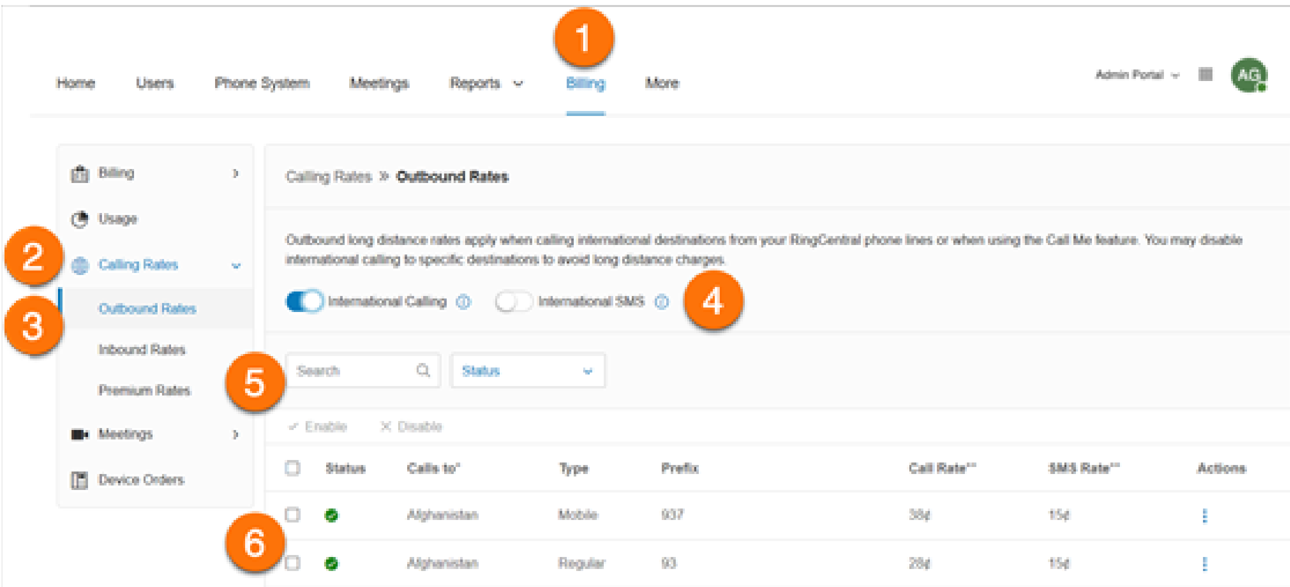
1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Change** under **Auto-Purchase**.
3. Select the **Calling Credits Package** you wish to purchase.
4. Click **Save**.



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**.



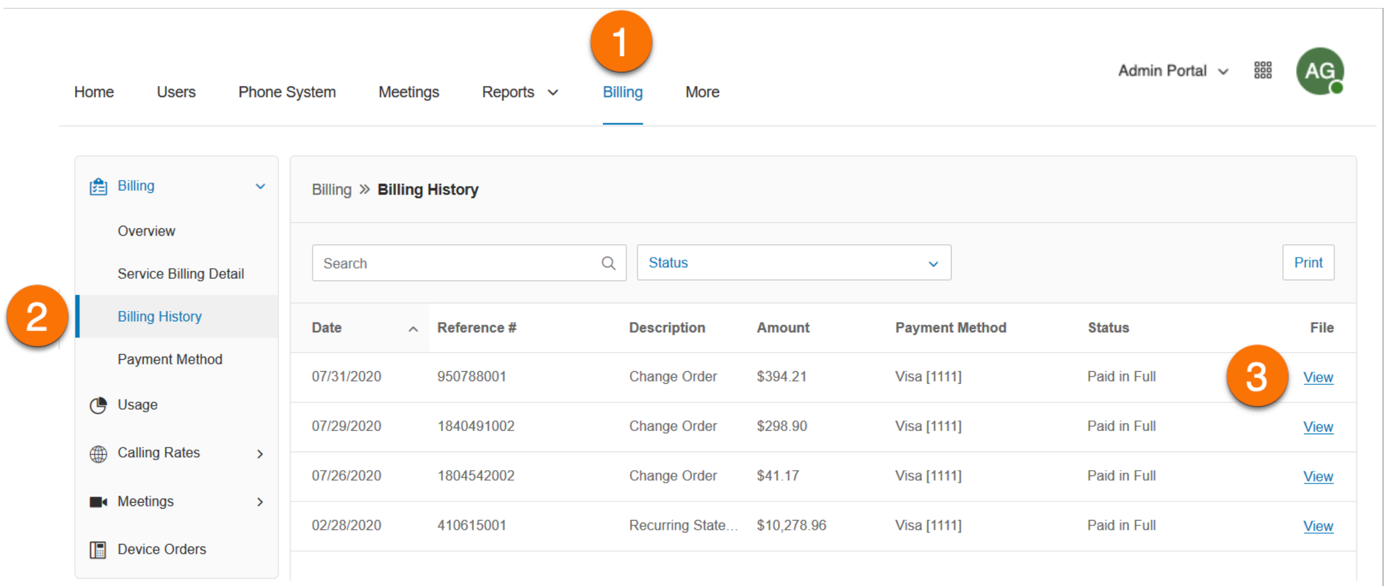
Viewing your Billing History

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



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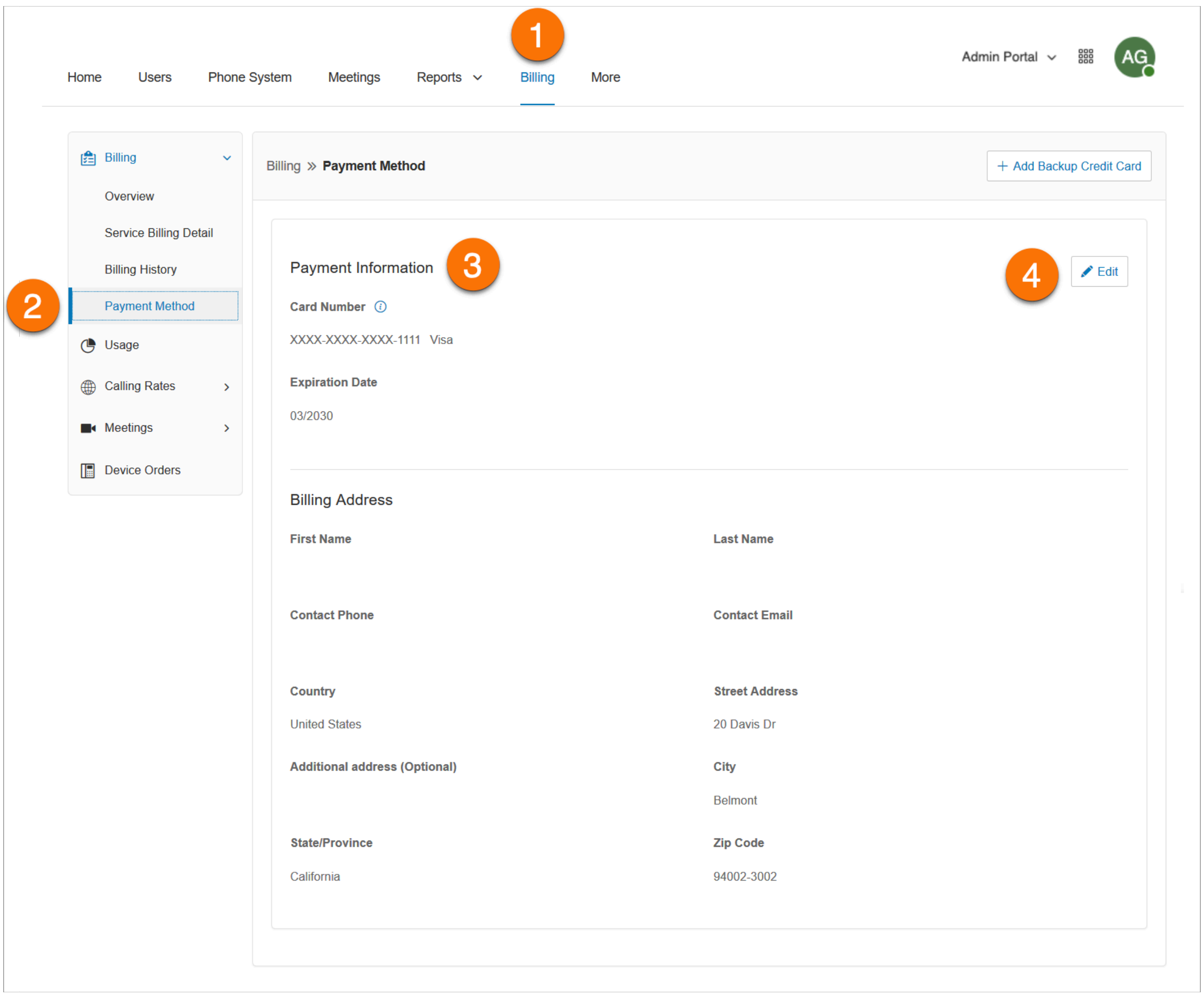
Managing payment methods

The **Payment Method** contains the credit card information attached to the RingCentral account. You can change your organization's credit card information or payment method via your RingCentral online account. You can also add a backup credit card.

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**.



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Updating your credit card information

As an admin, you can update or edit the credit card that's linked to your RingCentral account.

RingCentral accepts the following payment methods: Visa, MasterCard, AmericanExpress, and Discover. In the EU and UK, you can pay with direct debit.

To choose your payment method:

1. Sign in to the Admin Portal.
2. Go to **Billing > Payment Method**.
3. At the top right, click **Update** to edit your card's information.
4. If you have two or more cards linked, select the tab for the card you want to update, then click **Edit**.
5. Enter your card details and billing address.
6. Click **Save**.

Removing a credit card

As an admin, you can delete credit cards that are linked to your RingCentral account. You can only do this if you've linked two or more cards to your account.

1. Sign in to the Admin Portal.
2. Go to **Billing > Payment Method**.
3. Select the tab of the card that you want to delete.
4. Click **Remove**.

Adding a backup credit card

Credit card charges can sometimes be denied because of issues with expiration dates, fraud, or other matters. Setting up a secondary credit card will prevent your account from being suspended in case your primary card is compromised.

1. Sign in to the Admin Portal.
2. Go to **Billing > Payment Method**.
3. At the top right, click **Add Backup Payment Method**.
4. Enter your payment information and billing address.
5. Under **To be used for**, select either **All charges** or **Only recurring and calling credit charges**.
6. Check the box to authorize the charges, then click **Save**.

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Adding an alternate payment method

You can also add an alternate payment method, such as direct debit, to your RingCentral account.

Note: If you'd like to pay with direct debit but don't see that option in your online account, contact RingCentral Support.

1. Sign in to the Admin Portal.
2. Go to **Billing > Payment Method**.
3. At the top right, click **Add Alternate Payment Method.**
4. Select **Direct Debit**.
5. Enter your payment information and billing address.
6. Check the box to authorize the charges, then click **Save**.

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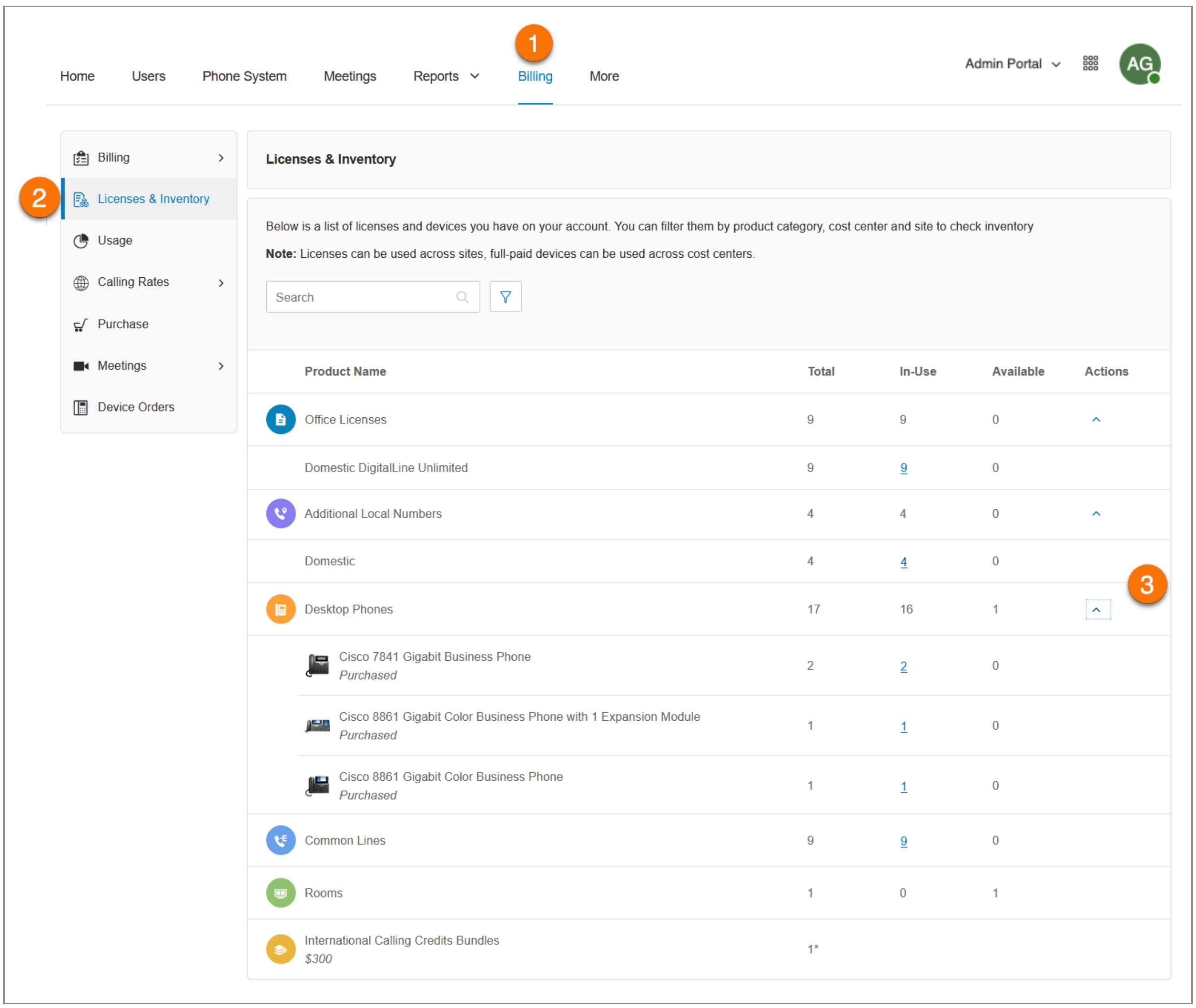
Licenses & Inventory

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 Licenses & 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.



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Managing licenses

You can view, upgrade, downgrade, download, and delete 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.

To download licenses from inventory:

1. Sign in to the RingCentral Admin Portal.
2. Go to **Billing > Licenses & Inventory**.
3. Click **Download Licenses**.

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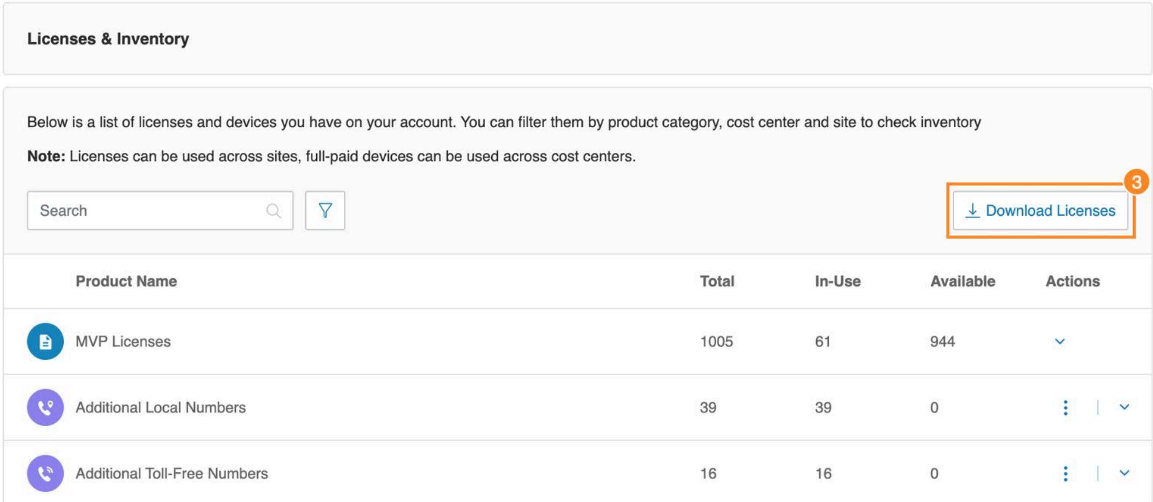
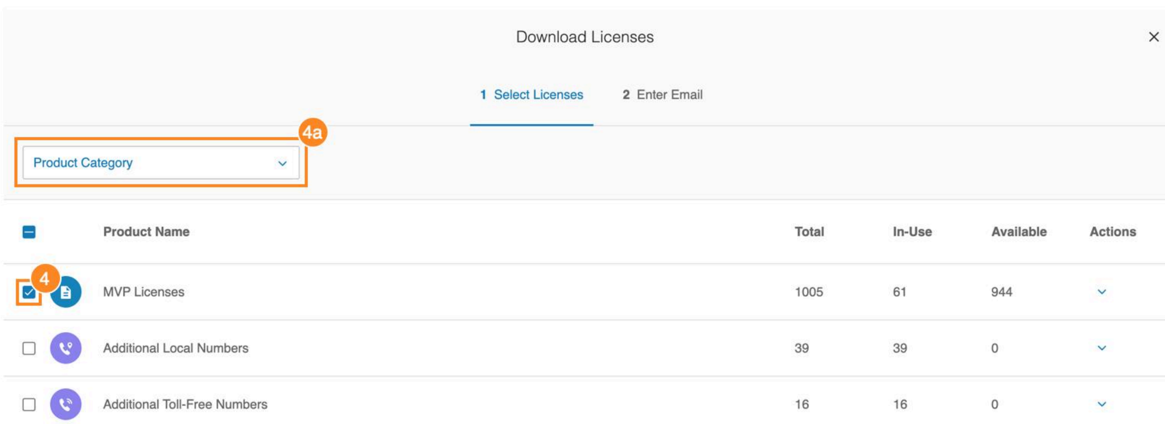


4. Check the box next to the name of the license(s) you want to download.
   a. You can click the Product Category dropdown to select or search for license types.



5. Click **Select**.
6. Enter the email address where you want to send the license.
   Note: The email may take up to 15 minutes to arrive, depending on the size of your account.
7. Click **Send**.

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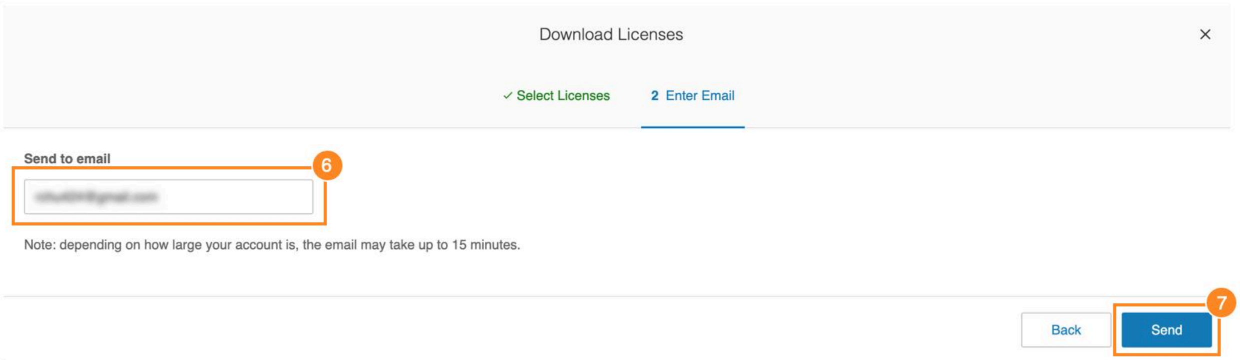

To delete additional local numbers or additional toll-free numbers:

1. Go to **Billing > Service Billing Detail**.
2. Look for **Additional Local Numbers** or **Additional Toll-Free Numbers**, then click the **More** menu icon under **Actions**.
3. Click **Delete**.
4. Select the license that you need to delete, then click **Next**. (Note: Only unassigned licenses can be deleted.)
5. Specify how many licenses you want to delete, then click Next.
6. Review selected licenses, then click **Delete**.
7. If you have reserved numbers in inventory, you may be asked to delete extra numbers (optional).
8. Check if your billing details has changed. (You may be prompted to accept a billing pre-statement if, for example, the removal of one or more licenses causes a credit return on an annual account.)

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.

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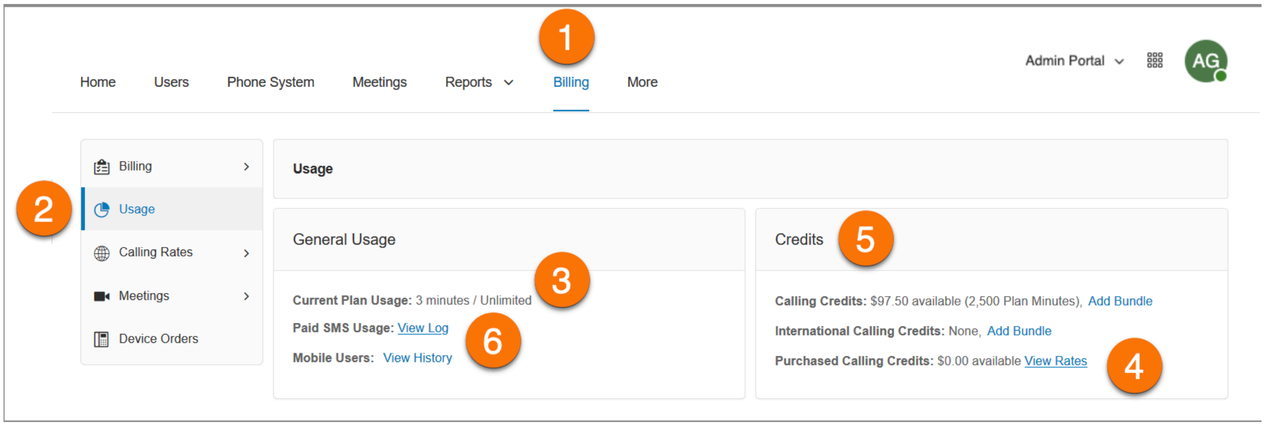
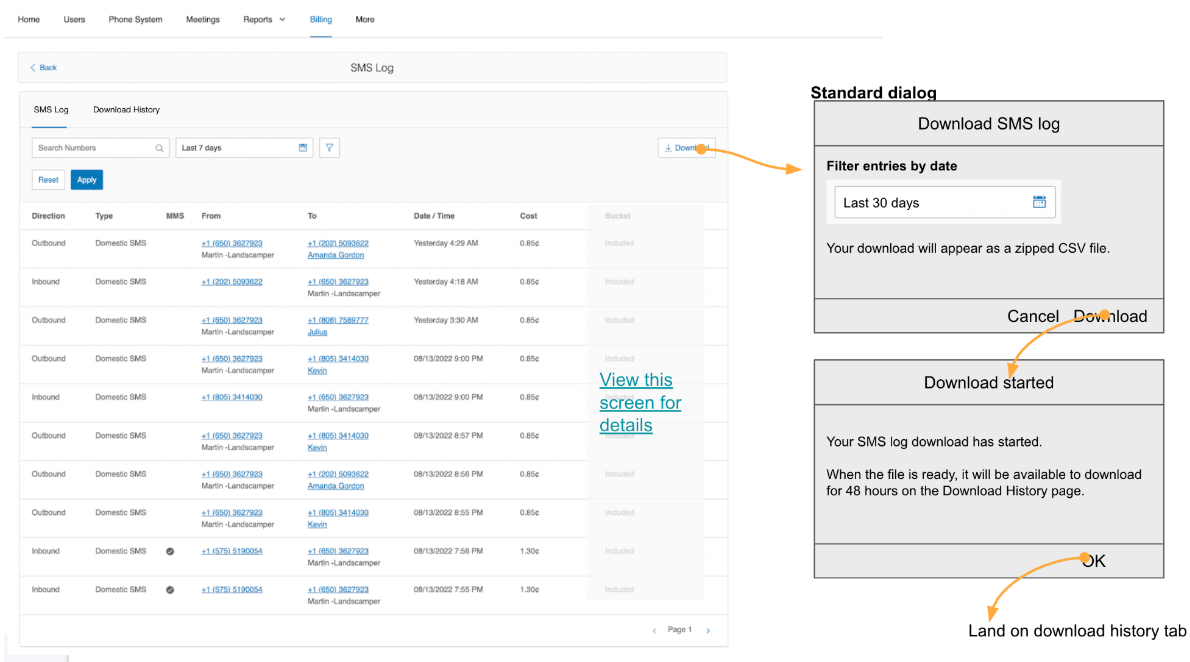


Downloading the SMS log

You can download a SMS log that is complete and accurate to better manage company resources.

1. Go to **Billing** > **Usage**.
2. Select **View Logs** next to **Included SMS Usage**.
3. Click **Download**.
4. Filter entries by your specified date (ex. 30 days).
5. Click **Download**.
6. Click **OK**.



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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**.

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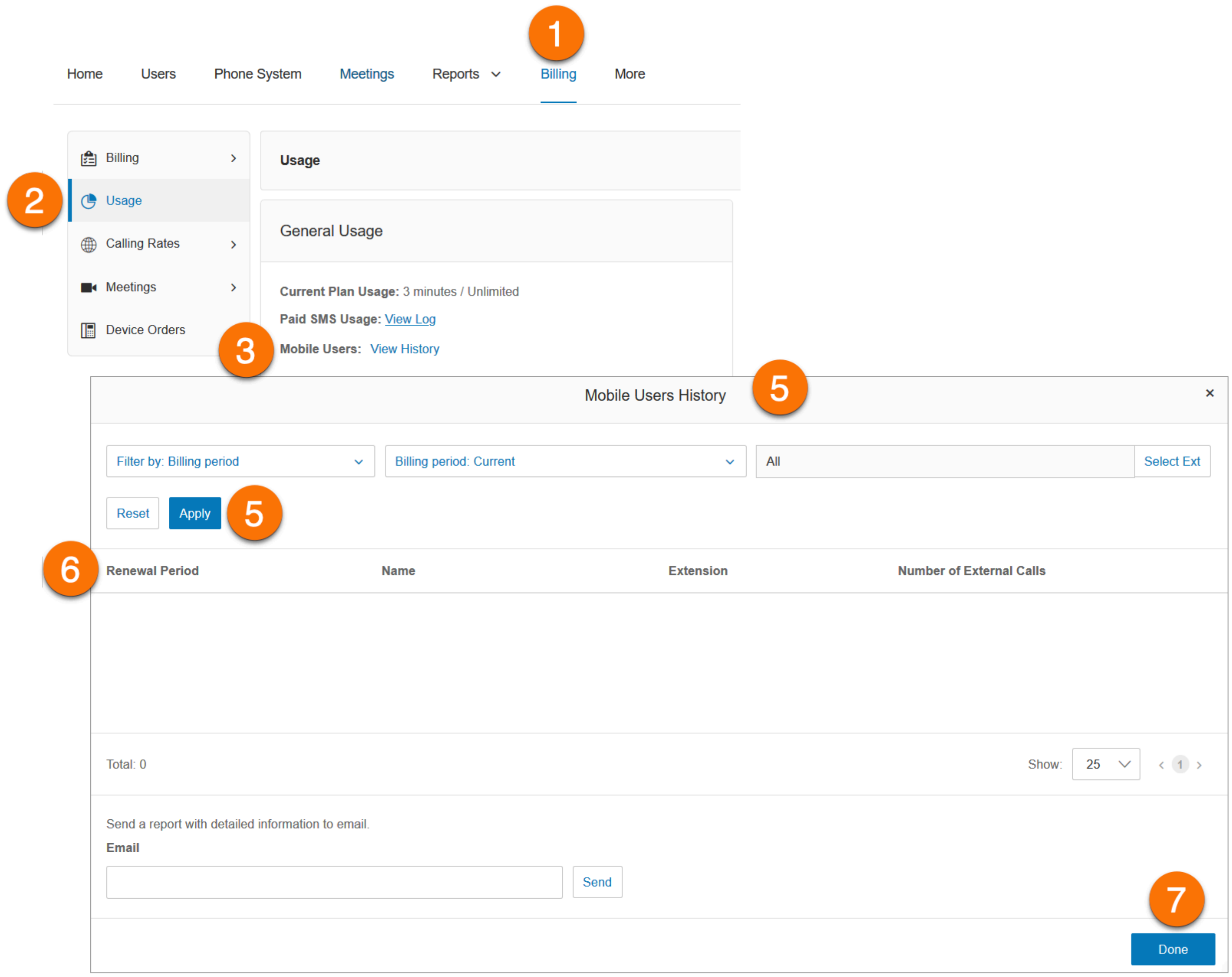
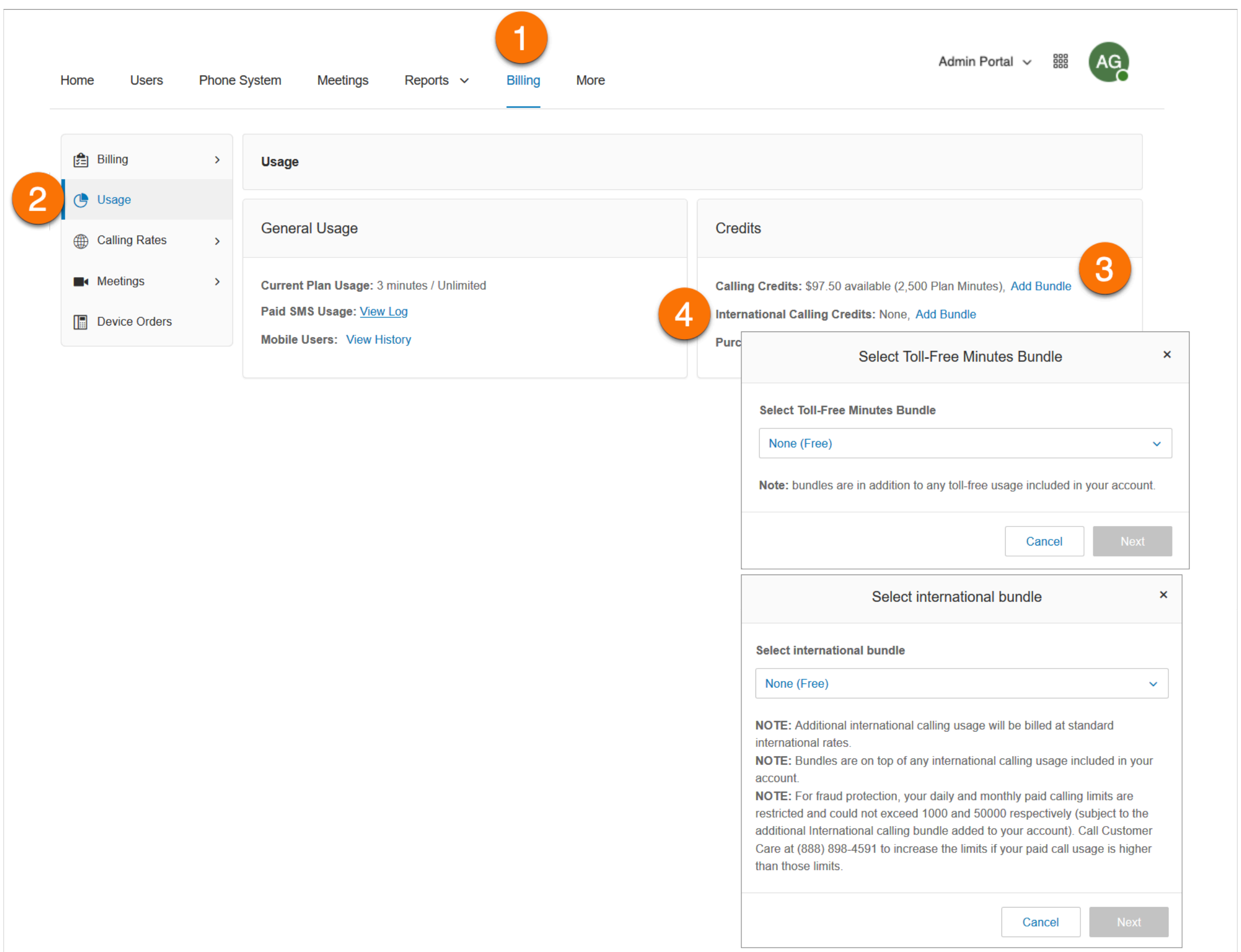

Home
Users
Phone System
Meetings
Reports
Billing
More
1
Billing
Usage
Calling Rates
Meetings
Device Orders
2
Usage
General Usage
Current Plan Usage: 3 minutes / Unlimited
Paid SMS Usage: View Log
Mobile Users: View History
3
Mobile Users History
5
Filter by: Billing period
Billing period: Current
All
Select Ext
Reset
Apply
5
6
Renewal Period
Name
Extension
Number of External Calls
Total: 0
Show: 25
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.



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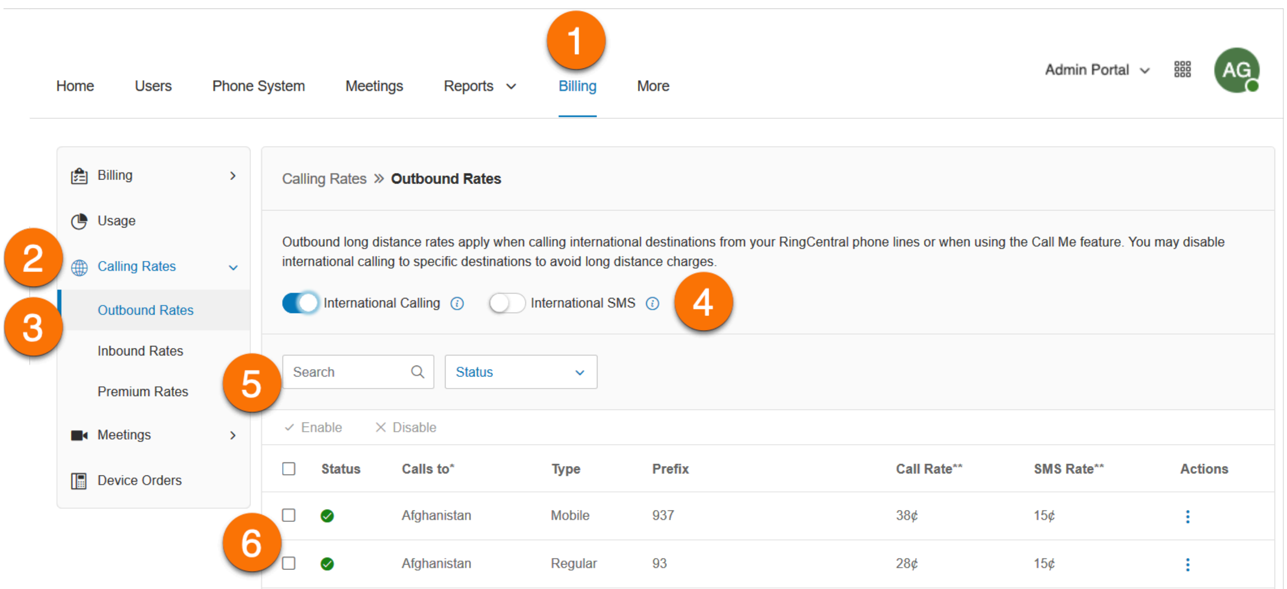
Managing Calling Rates

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.

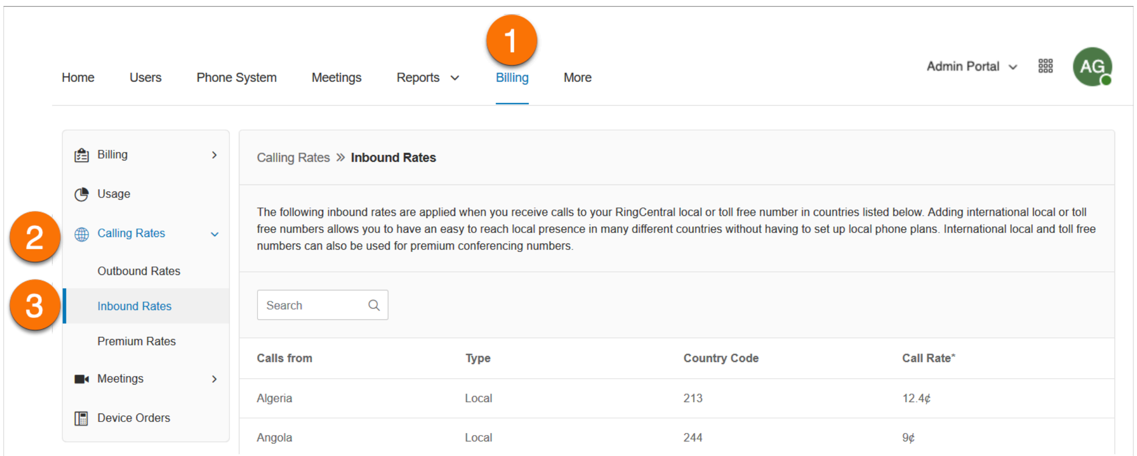


Viewing inbound rates

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**.

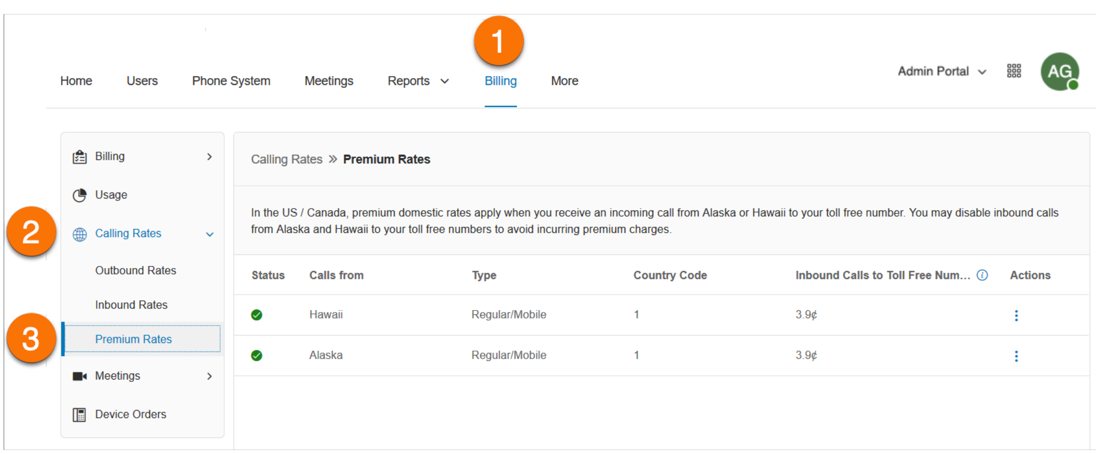


Viewing premium rates

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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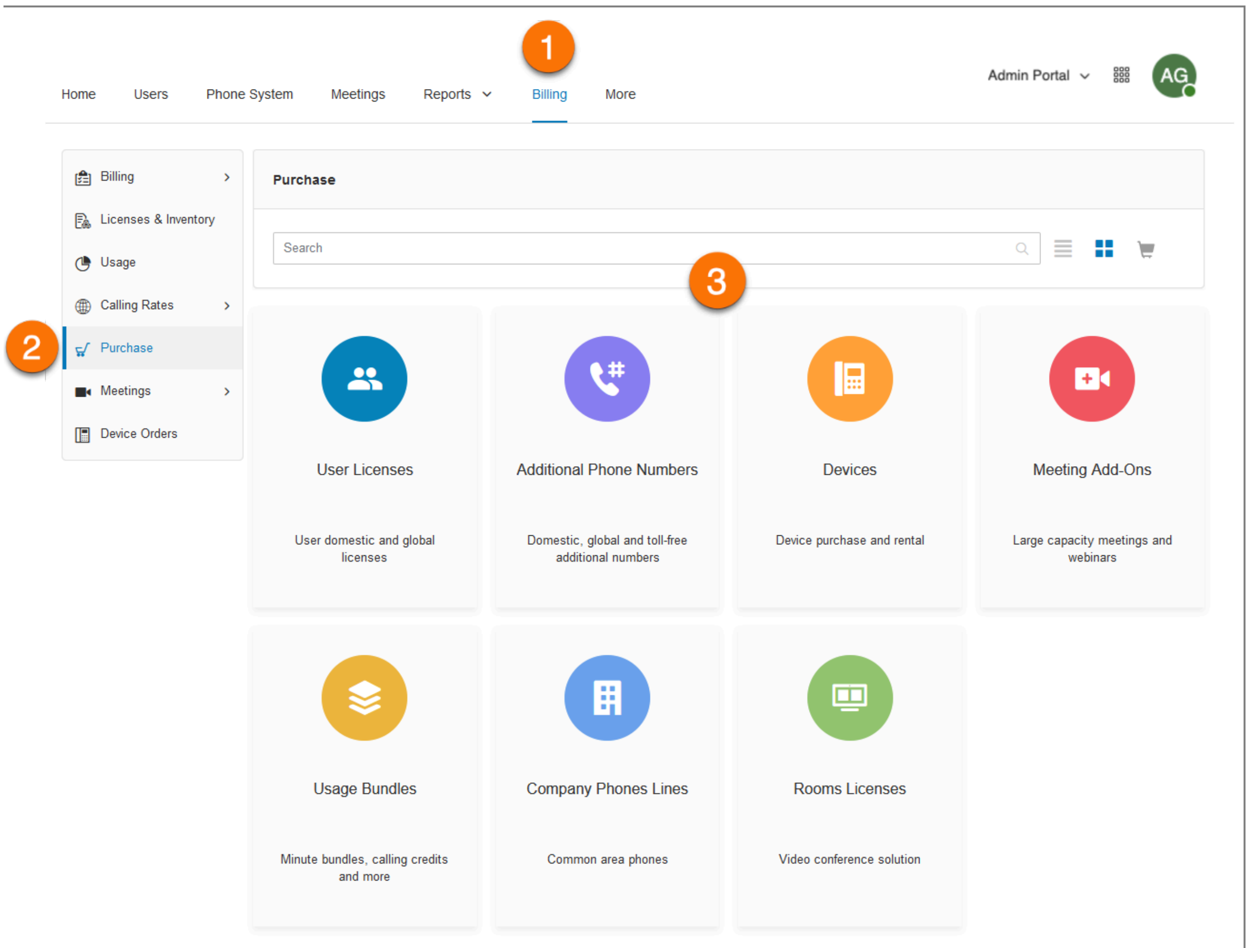
Managing Purchases in the Billing tab

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.



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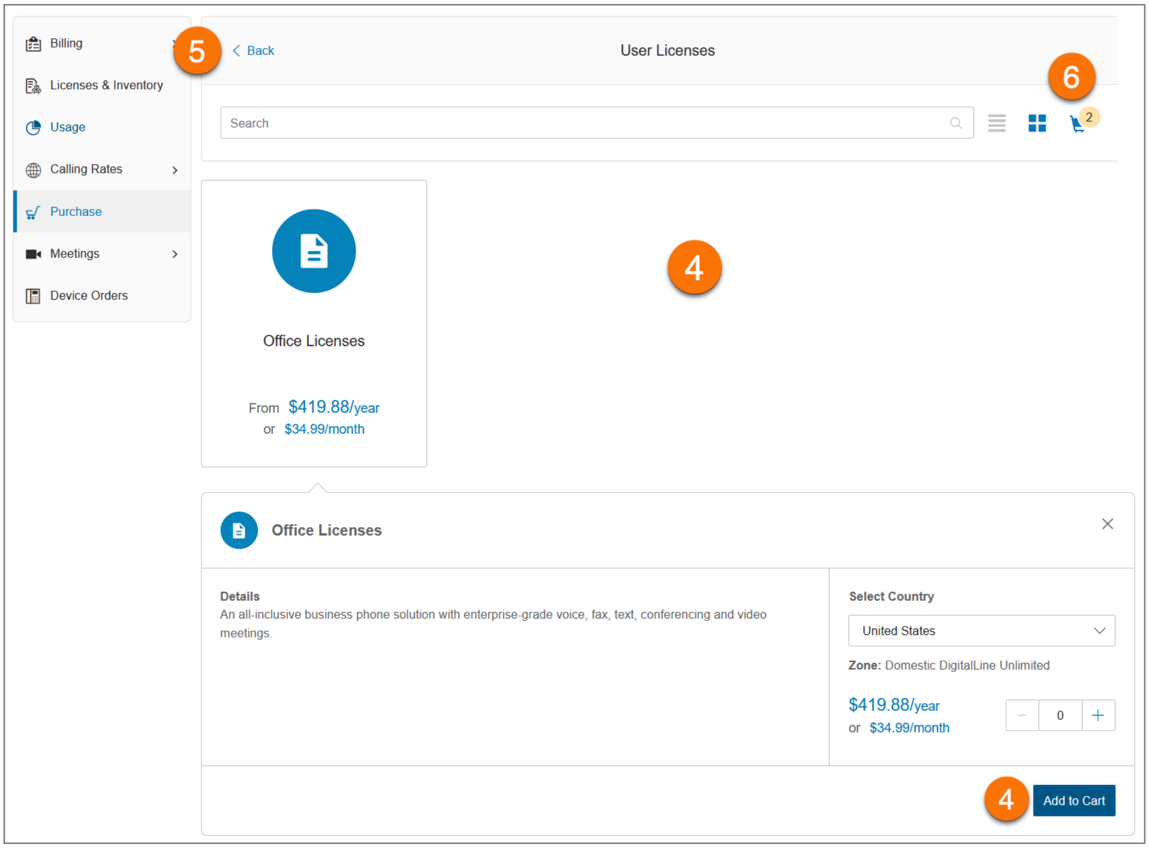
4. Click Add to Cart in the lower right corner to add your selection to your shopping cart.
5. To buy additional products, click **Back** in the upper left corner of the pane to return to the Purchase overview page and continue shopping.
6. Or, click on the shopping cart icon at the upper right corner to access your shopping cart.



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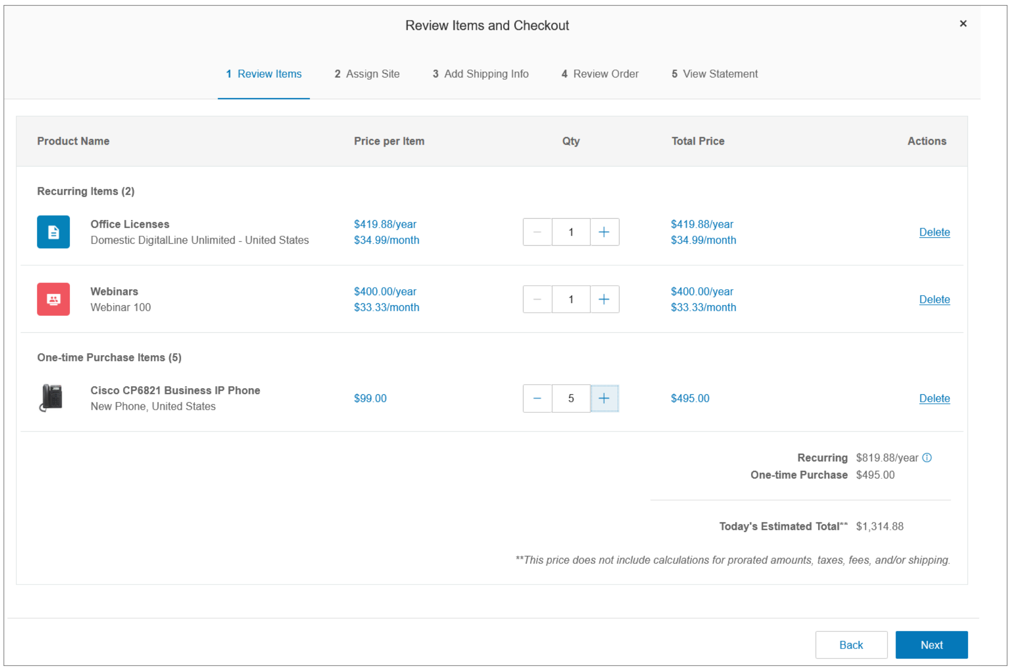
Using the Shopping cart to check out

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.



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**.

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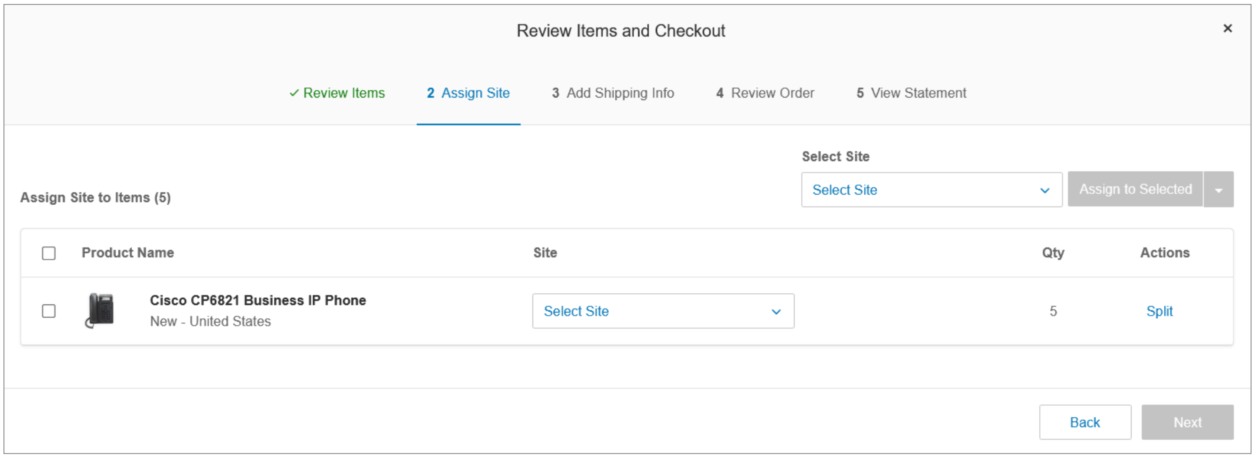
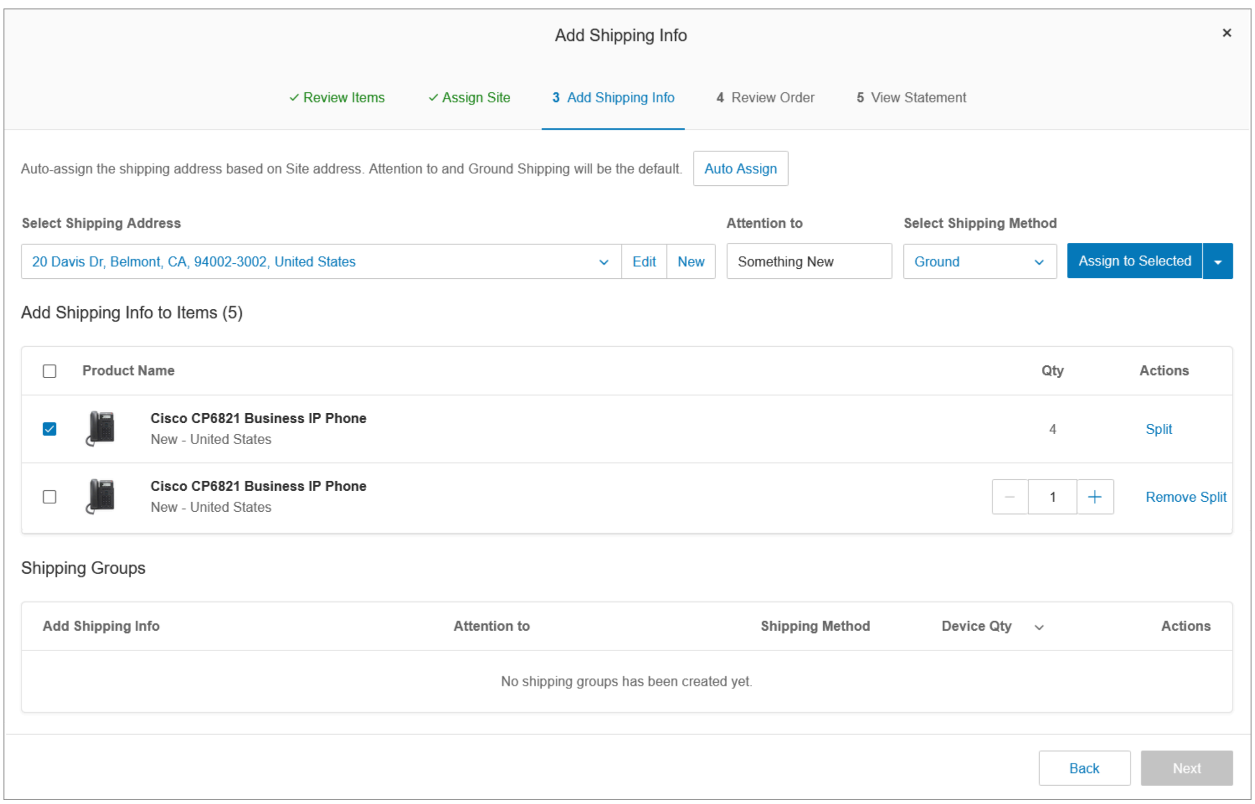


Add Shipping Info

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**.



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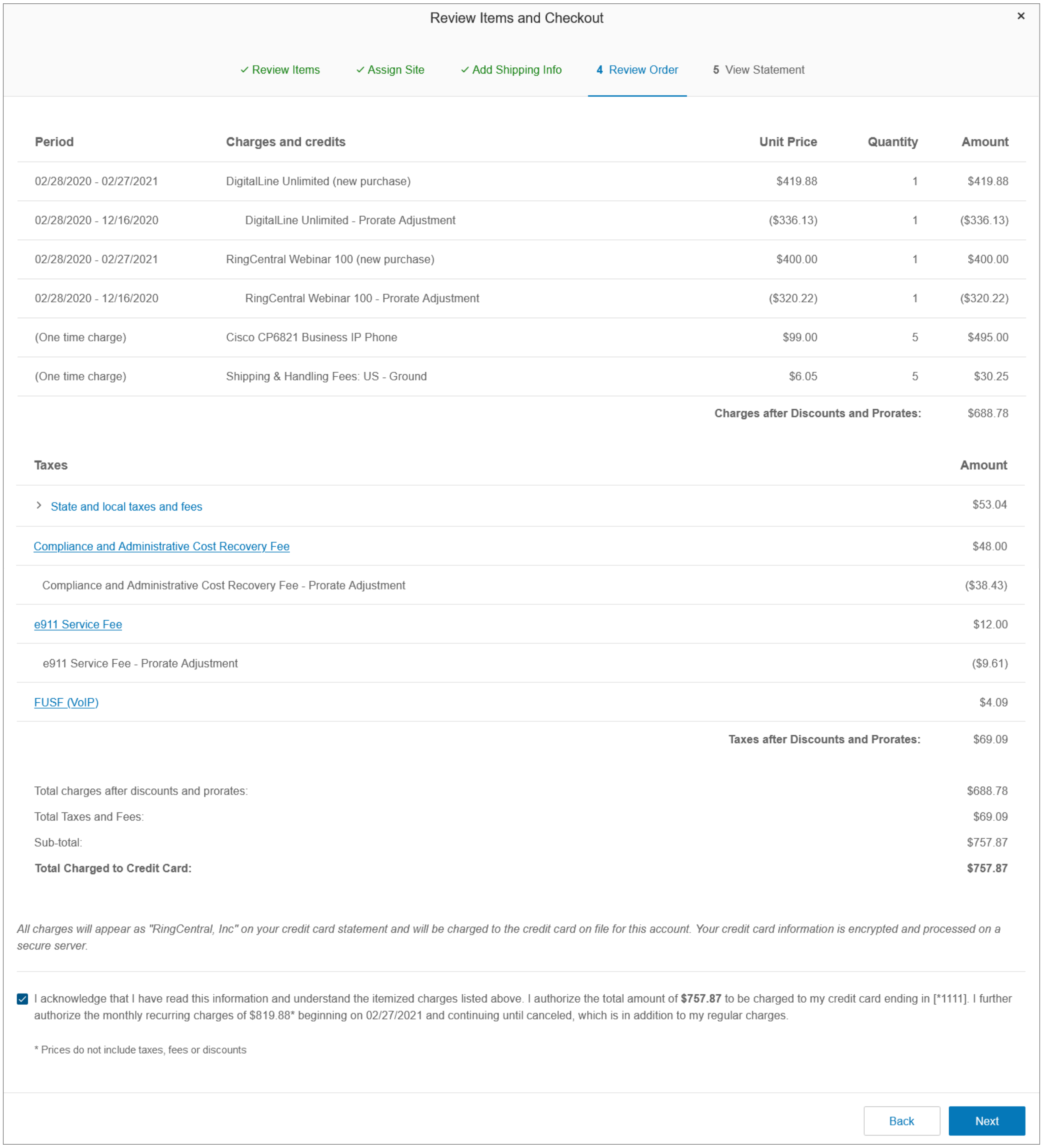
Review Order

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)
FUSF (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

Back Next

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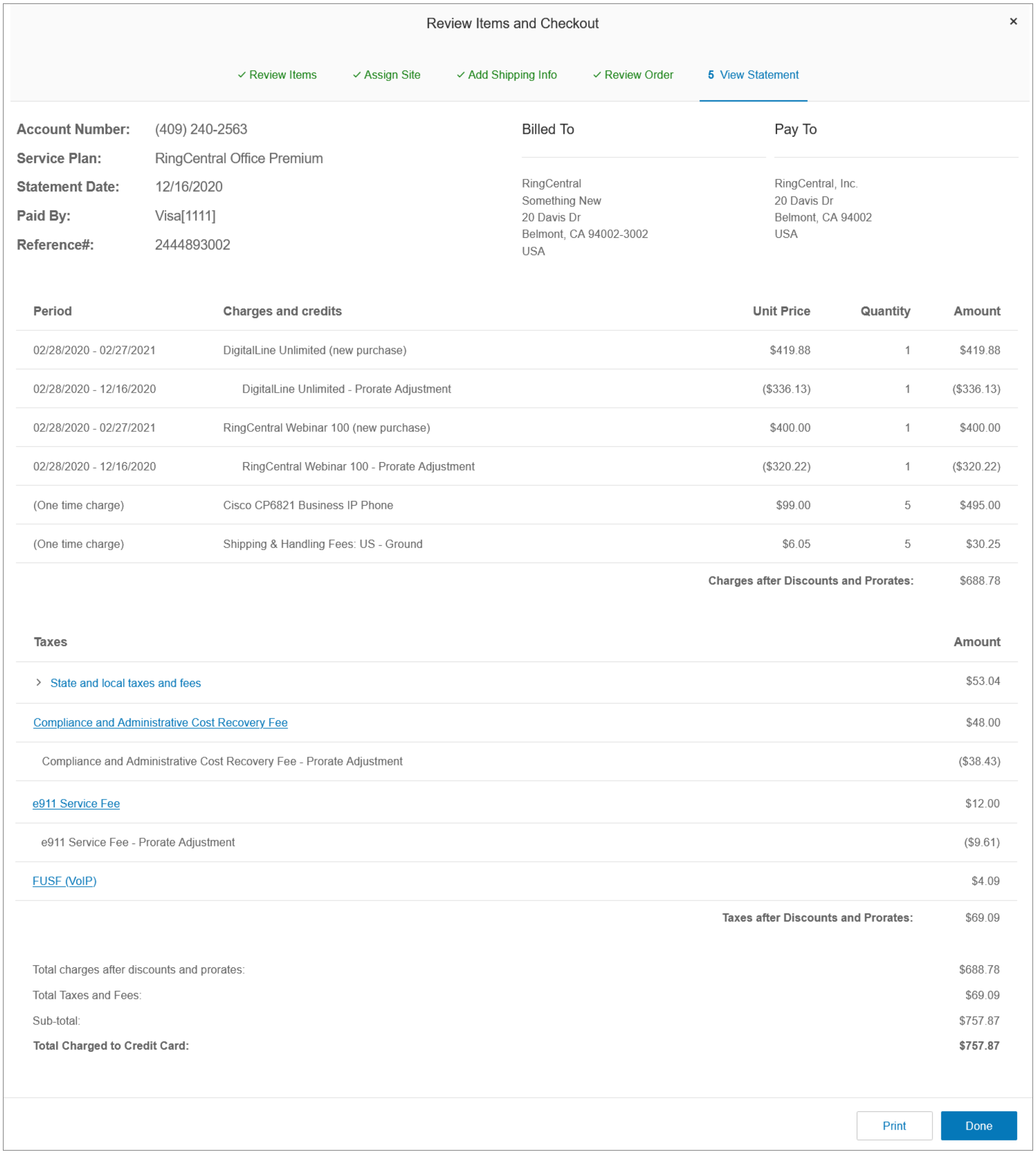
View Statement

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
Service Plan: RingCentral Office Premium
Statement Date: 12/16/2020
Paid By: Visa[1111]
Reference#: 2444893002

Billed To

RingCentral
Something New
20 Davis Dr
Belmont, CA 94002-3002
USA

Pay To

RingCentral, Inc.
20 Davis Dr
Belmont, CA 94002
USA

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)
FUSF (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**

Print Done

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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 RingEX 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.

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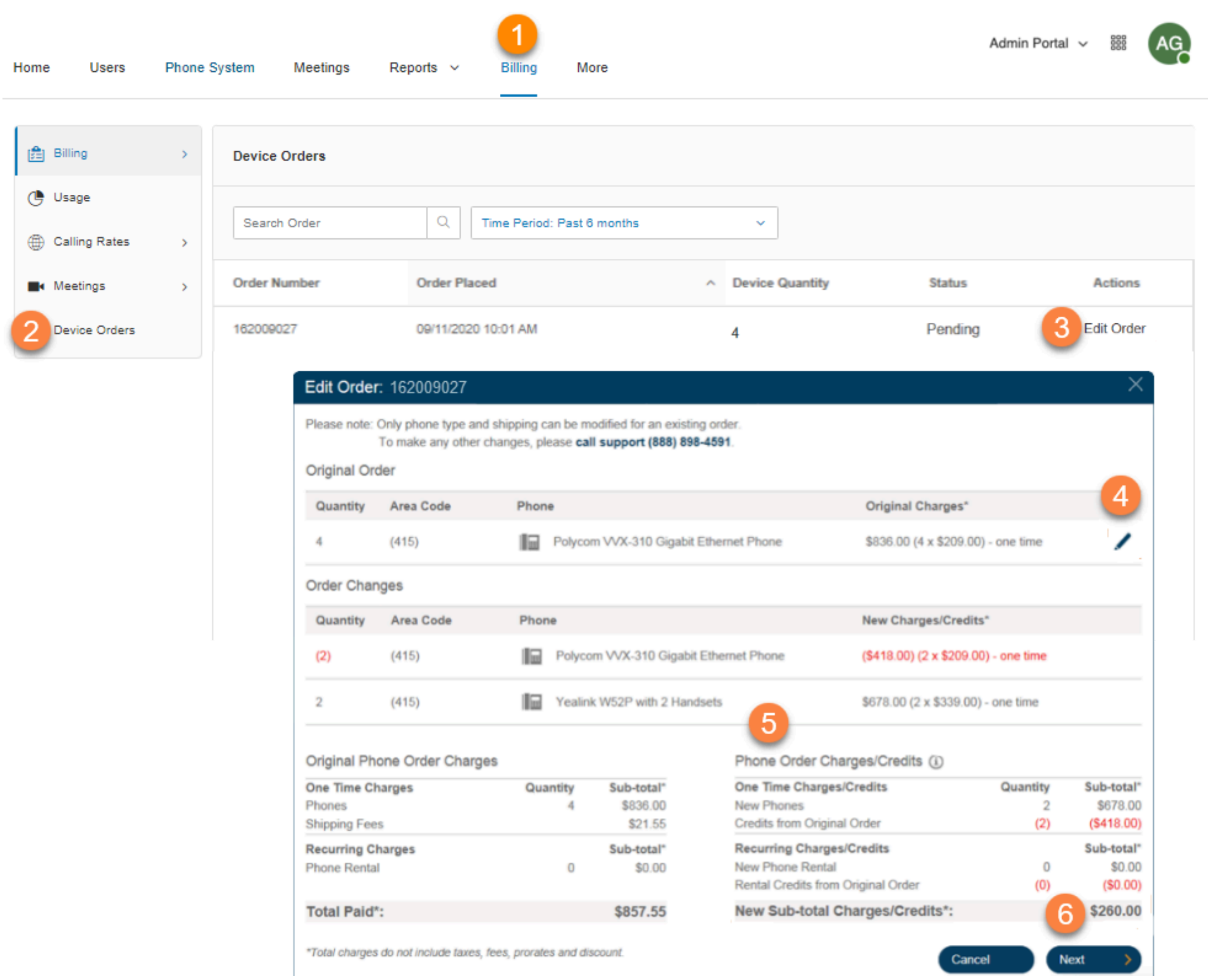
Managing device orders

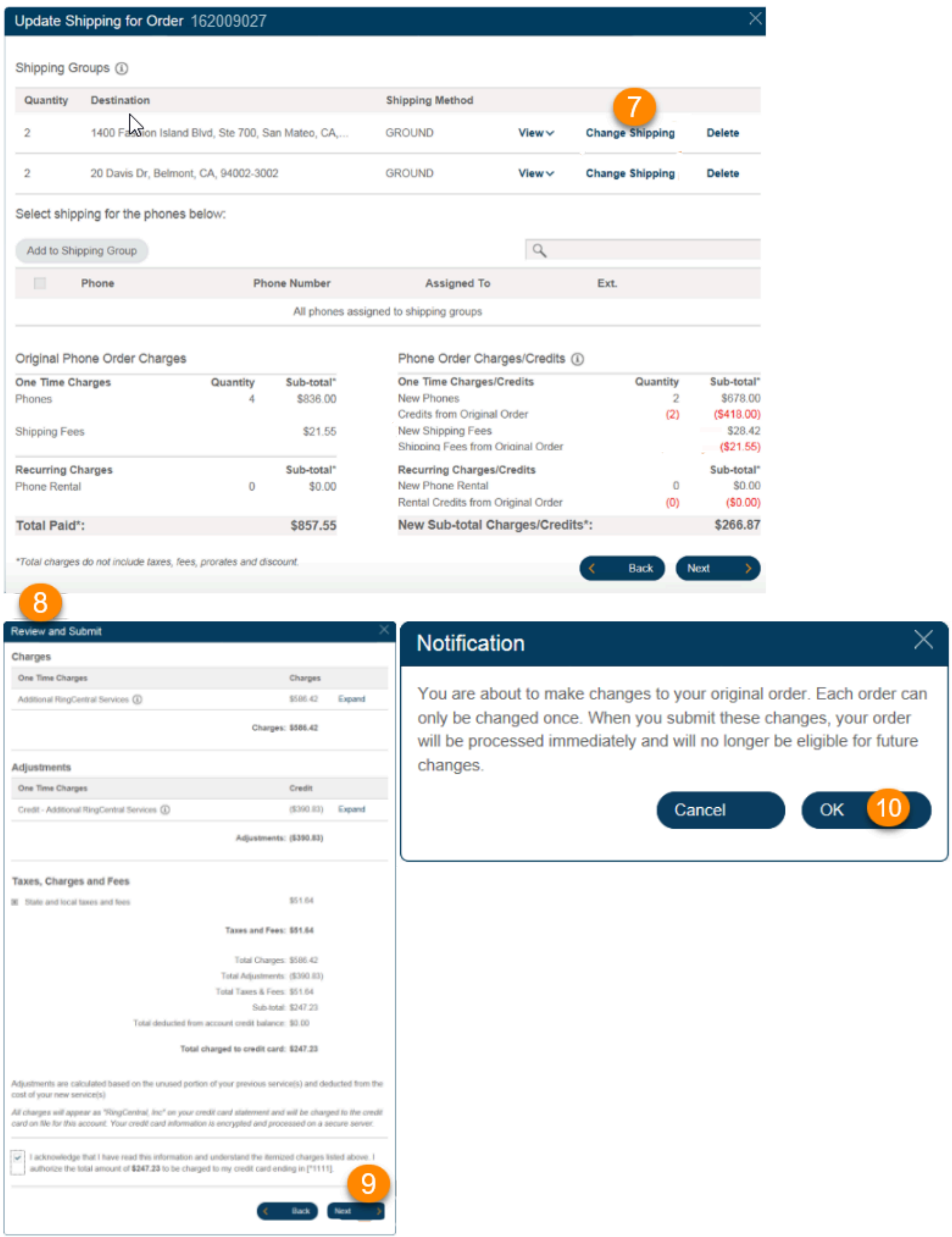
The Device Orders management feature allows you to view past orders and edit those device orders that are in *pending* status to change the devices ordered, or the shipping address.

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.

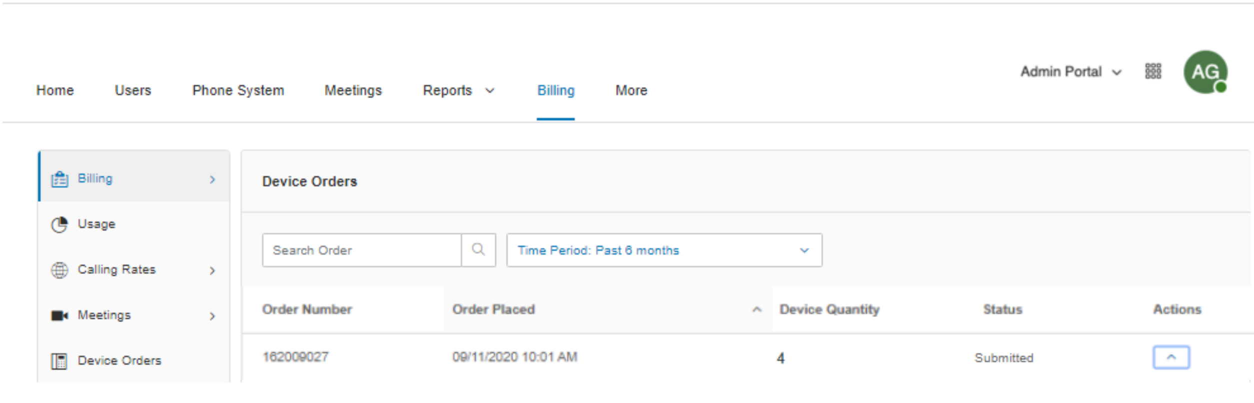
1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Device Orders**.
3. Click **Edit Order** on a pending order.
4. Click the pencil icon to make changes. Select the items that you want to change and change the devices (one or many) to the desired device.
5. Once completed, new charges (or credits) are displayed under **Phone Order Charges/Credit**.
6. Click **Next**.

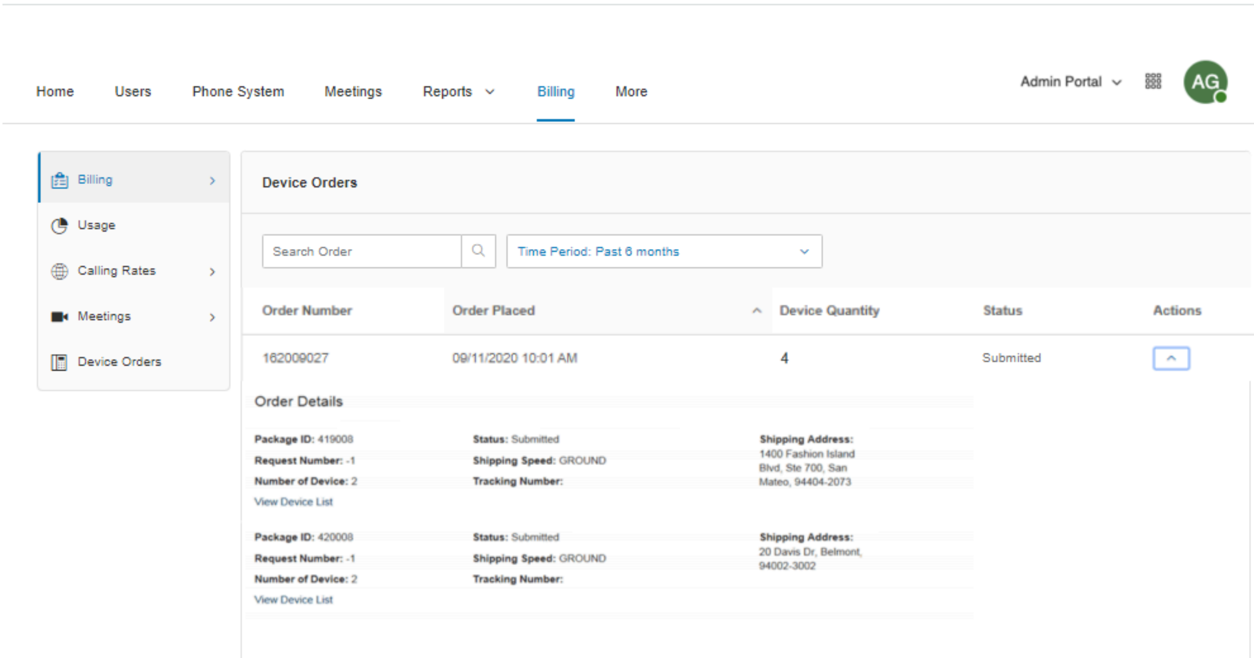


7. Update the Shipping Address if needed. The shipping charge will be adjusted and will reflect on **New Shipping Fees**.
8. You will see a pre-statement and statement with Adjustments for the credits and charges for new phones.
9. Click **Next**.
10. Click **OK** to confirm that once submitted, you can no longer update the order.



The order update is complete, and the order status is changed to **Submitted**. You can click **View Order** to see the final order.



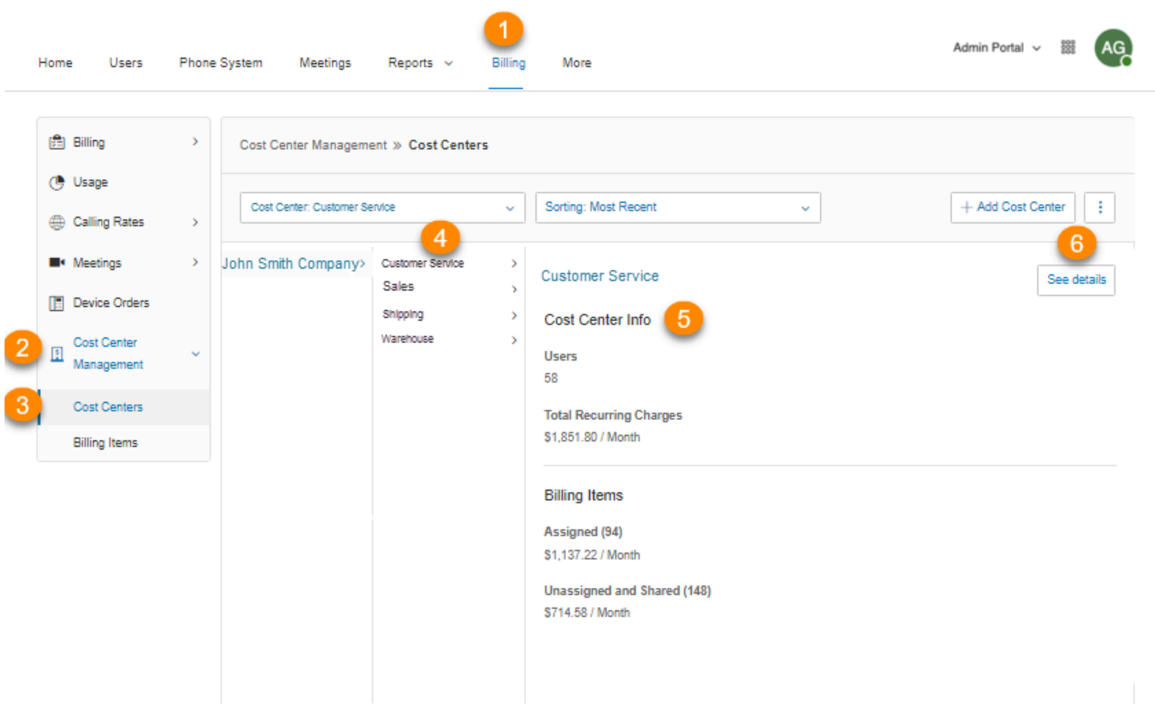


Using the Cost Center Management feature

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.



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.

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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.

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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).
- Detects 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.).

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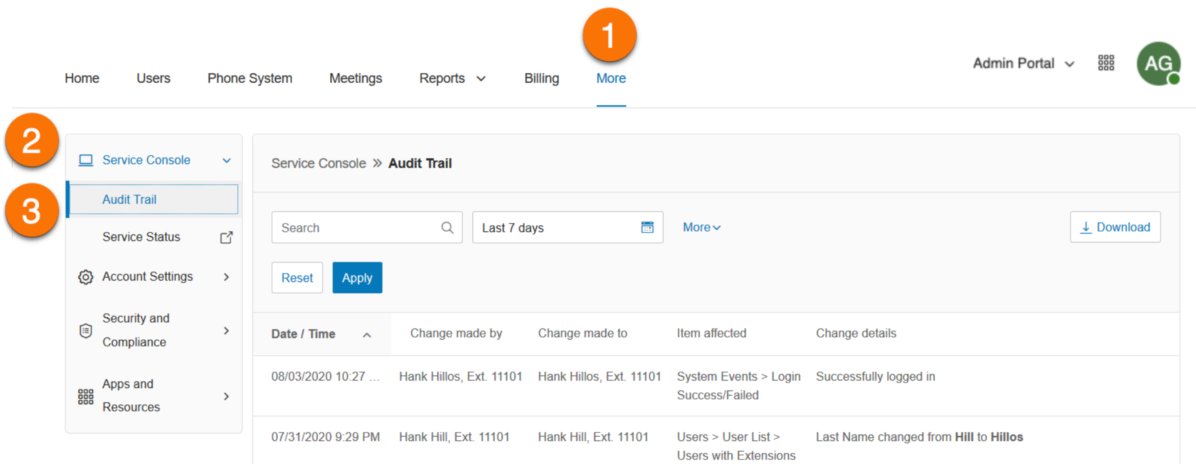
- **Company settings:** Enable phone features (on/off); Allow employees to add people (on/off); File sharing (service, on/off), for example Google Drive on/off, Evernote on/off, etc.; Allow Giphy sharing (max rating), for example, Max rating of PG-13.
- **Data Retention:** Policy set to N days.
- **Compliance 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.

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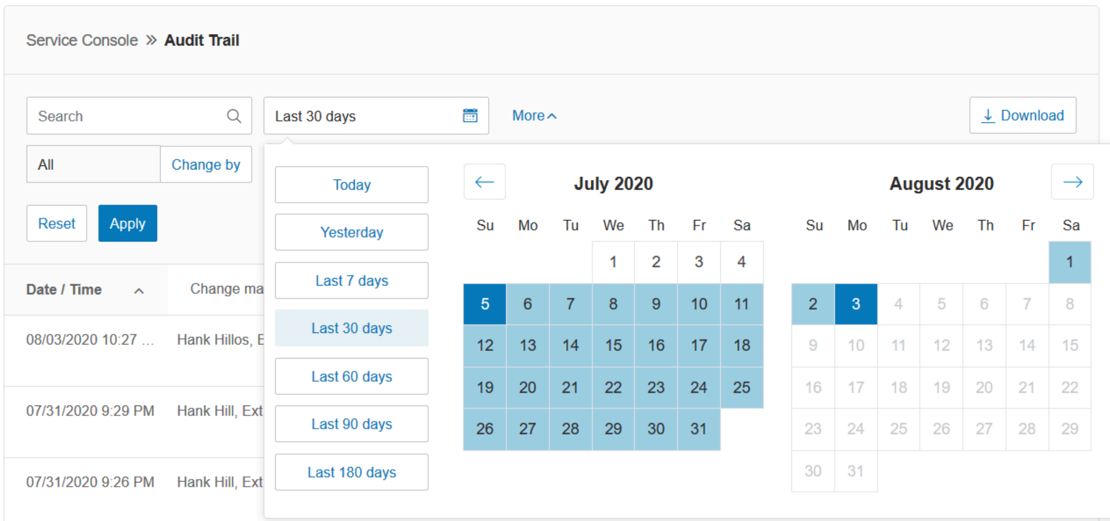
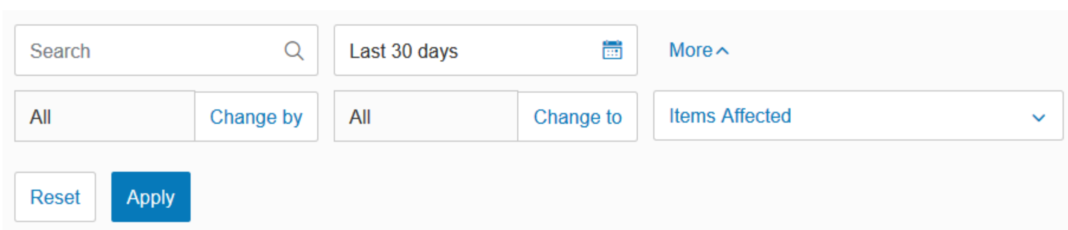
Search Capability

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.



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.



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**.

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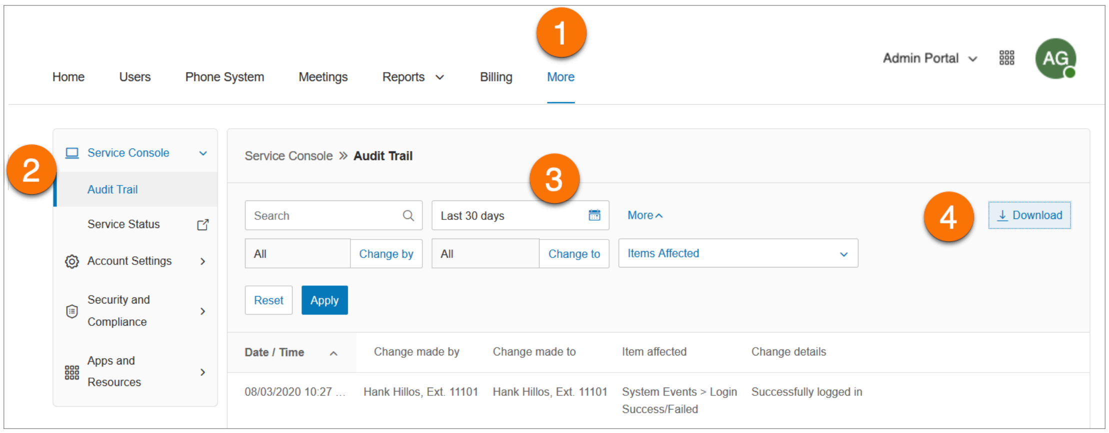
2. Under **Service Console, click Audit Trail**.
3. Do an Audit Trail search.
4. When you would like to generate a CSV file containing the Audit Trail result, click **the Download** button.
5. Click **Download** on the **Confirmation** window.

Note: Audit Trail is available to all tiers of RingCentral RingEX accounts and is enabled by default. To disable the feature, Contact RingCentral Support.



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.

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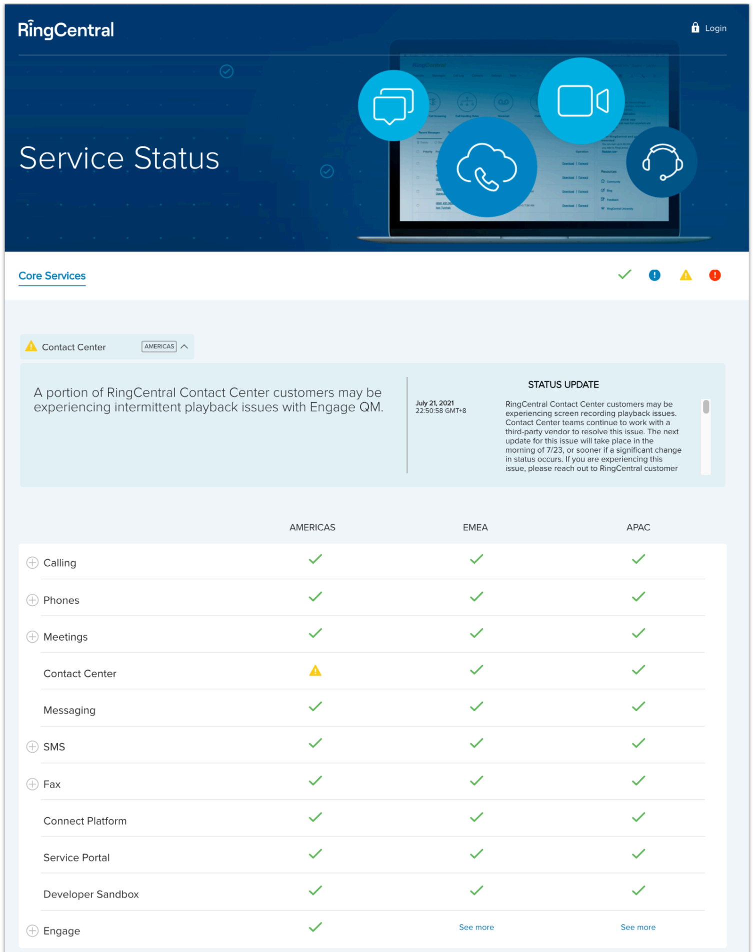

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Account settings

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**.

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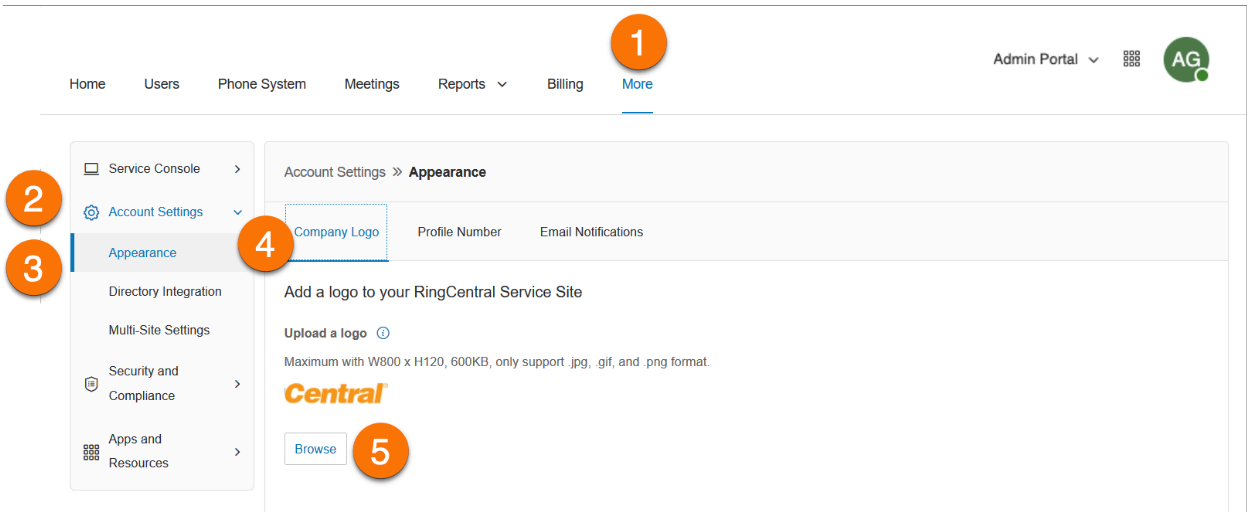
4. Click **Company Logo**.
5. Click **Browse** to browse your computer for an image to upload and select the file you want to use.
6. Click **Open**.
7. Enter the URL that will be opened when a user clicks on your image.
8. Click **Save**.
9. View your logo in the top-right corner of your online account and test the URL by clicking on the image.



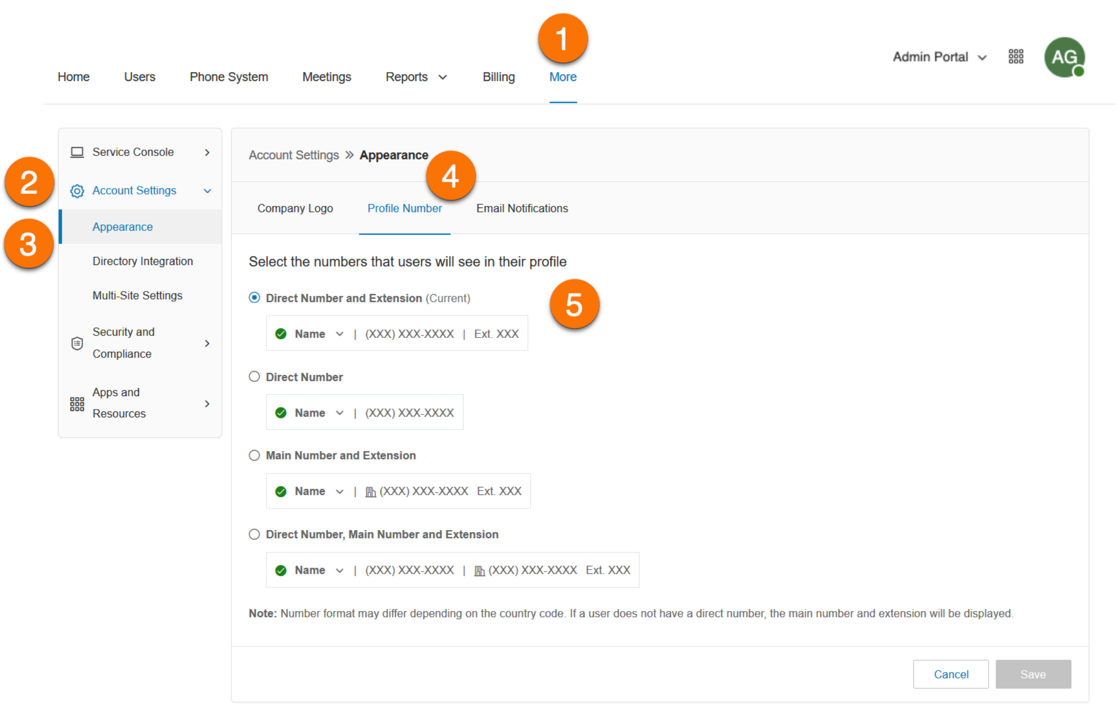
Profile number

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. Administrators can upgrade a direct number or DID (additional local number) of a user to a full RingEX license.

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**.



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 the 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**.

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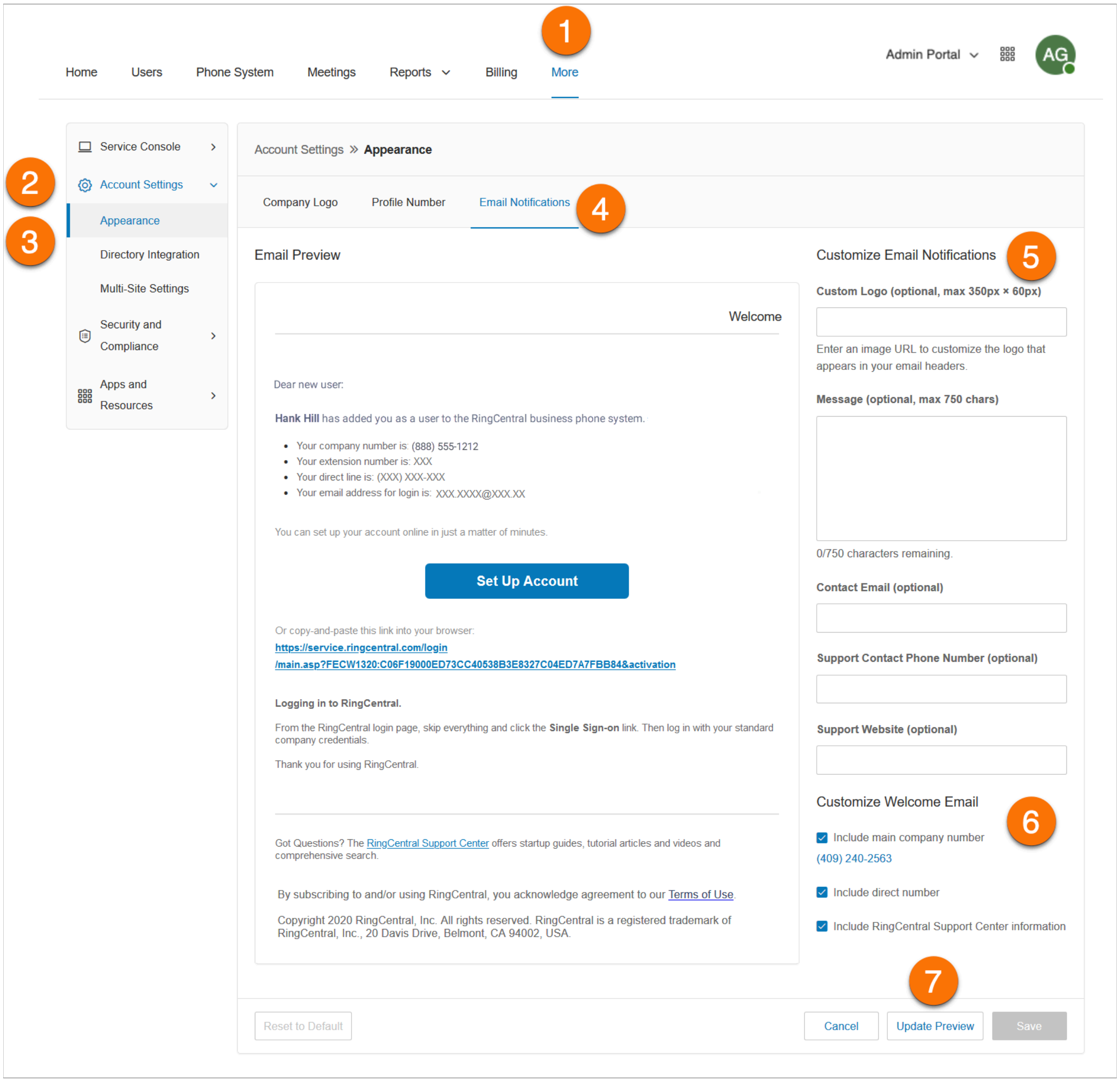

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Archiver Settings

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**.

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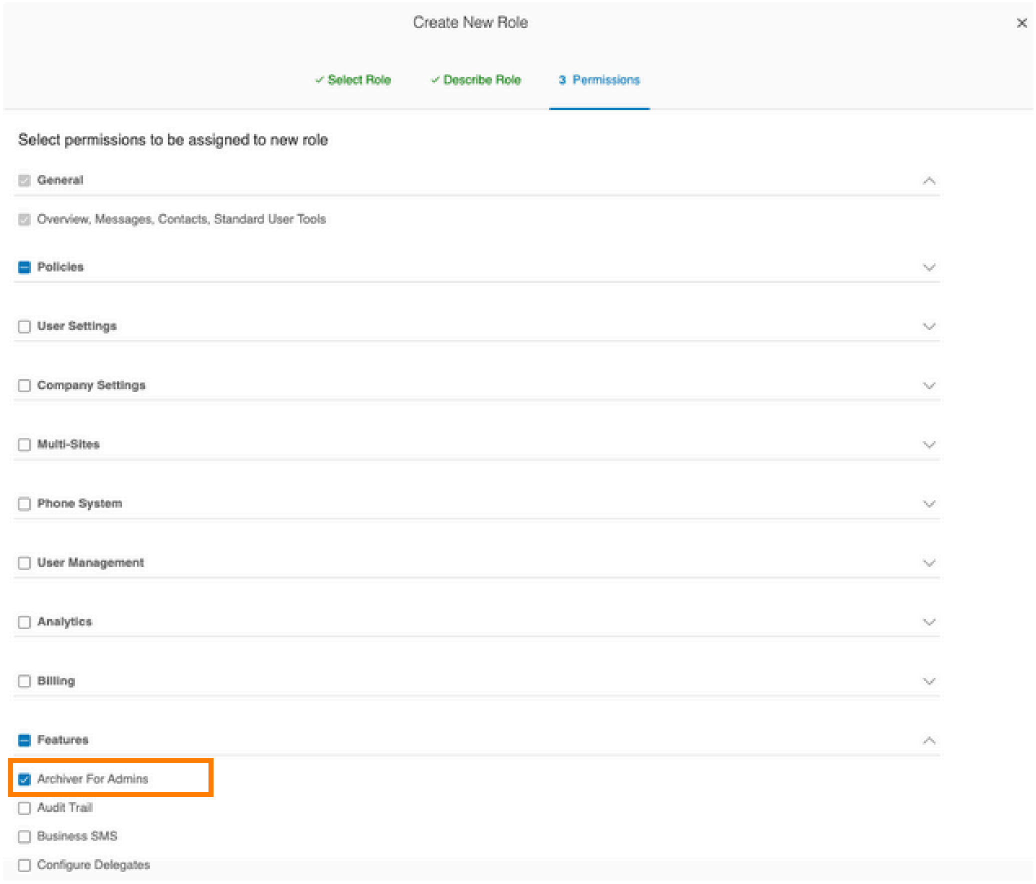

Enabling access for users

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.

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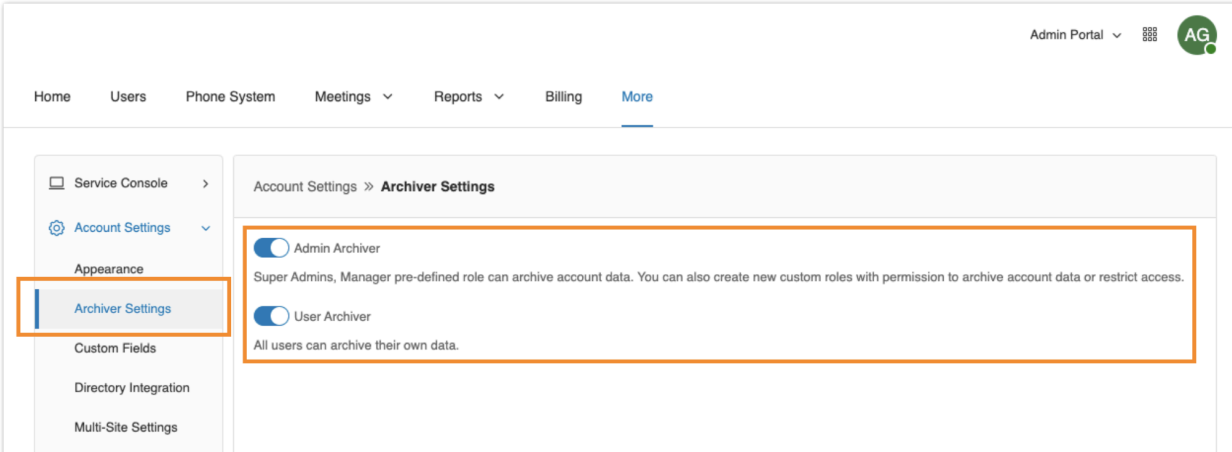


Directory integration

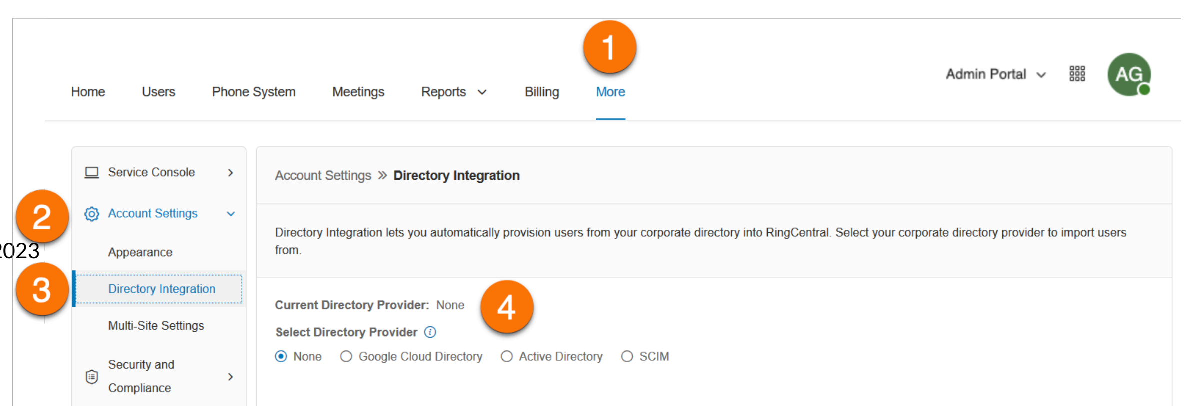
Directory Integration allows you automatically provision users from your corporate directory into RingCentral.

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.



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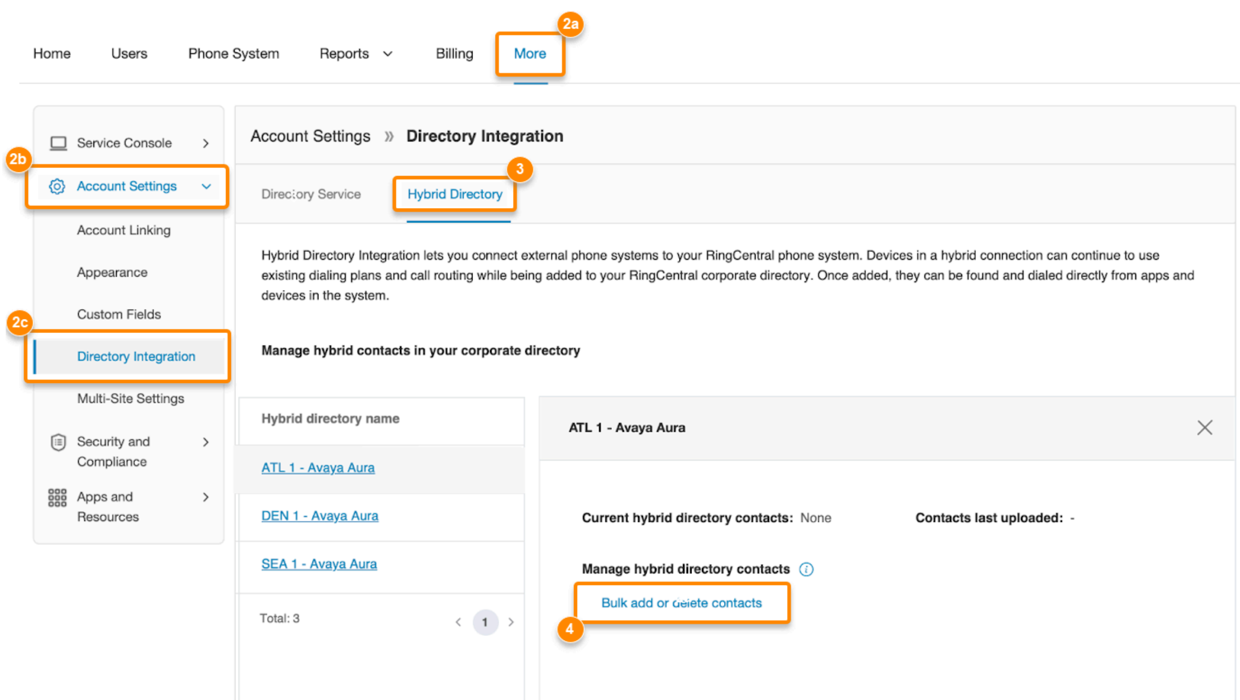
Cloud Connector

Cloud Connector's hybrid directory integration lets you connect external phone systems to your RingCentral phone system. Devices in a hybrid connection can use existing dialing plans and call routing while being added to your RingCentral corporate directory. Once added, they can be located by and dialed from the RingCentral apps and devices.

To enable Cloud Connector in your account, you need to contact RingCentral Support.

To add or delete hybrid directory contacts:

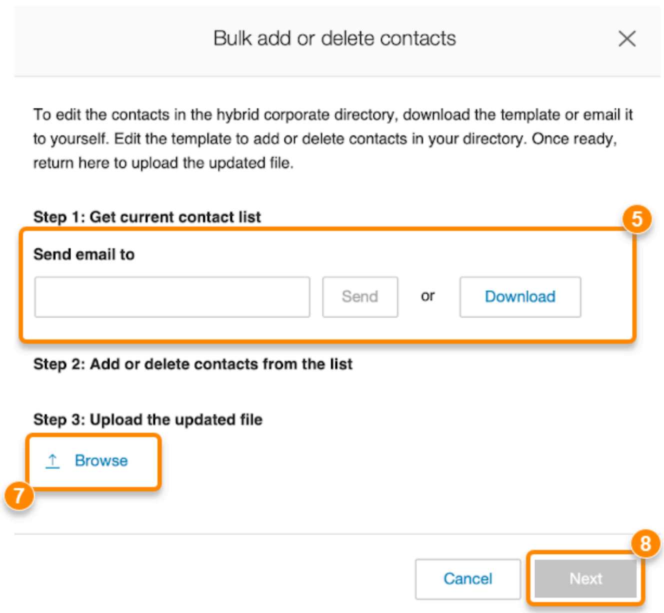
1. Go to the Admin Portal and sign in.
2. In the top menu, click **More**, then go to **Account Settings > Directory Integration**.
3. Under **Directory Integration**, go to *Hybrid Directory* and select the directory you want to modify.
4. Click **Bulk add or delete contacts**.



5. To receive the current contact list, either enter your email address and click **Send** or click the **Download** button. By default, the file is an empty CSV file.
6. Add or delete contacts in the CSV file. Note: Edit the downloaded CSV file in a text editor. If you are using Excel or another similar program, make sure it doesn't change the file format after saving.
    a. Contact names are required.
    b. The *Email* and *DirectNumber* fields are optional. If you fill in the *DirectNumber* field, then the number can be used to call users.

   c. Take care not to alter the format of the template.

7. Once the template is complete, save it and upload the revised file by clicking **Browse**.
8. Click **Next**.



9. A confirmation window will appear after a successful upload, and you'll also receive a confirmation email. If you want to notify others, you can enter additional emails in the **Additional notification recipients** field.
10. In the confirmation window, click **Submit**, then click **Done**.

Multi-site settings

Multi-Site Support provides a management solution for customers with multiple branch locations. Multi-Site Support is available for RingCentral RingEX 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**.

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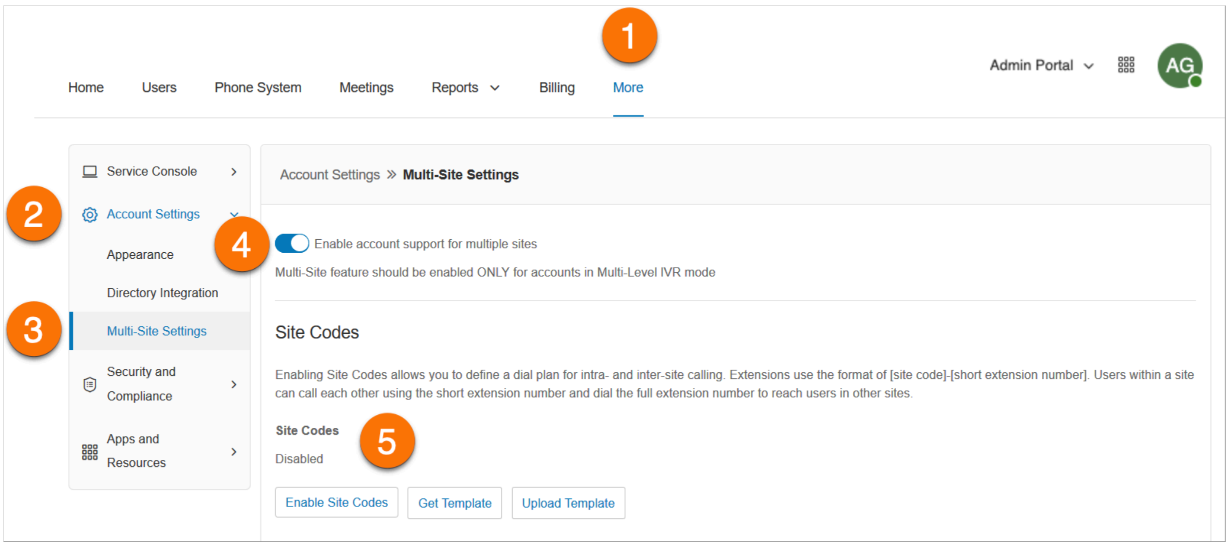
2. Click **Account Settings**.
3. Click **Multi-Site Settings**.
4. Toggle the switch on to **Enable account support for multiple sites**.
5. Configure site codes, if required for your dialing plan.

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.



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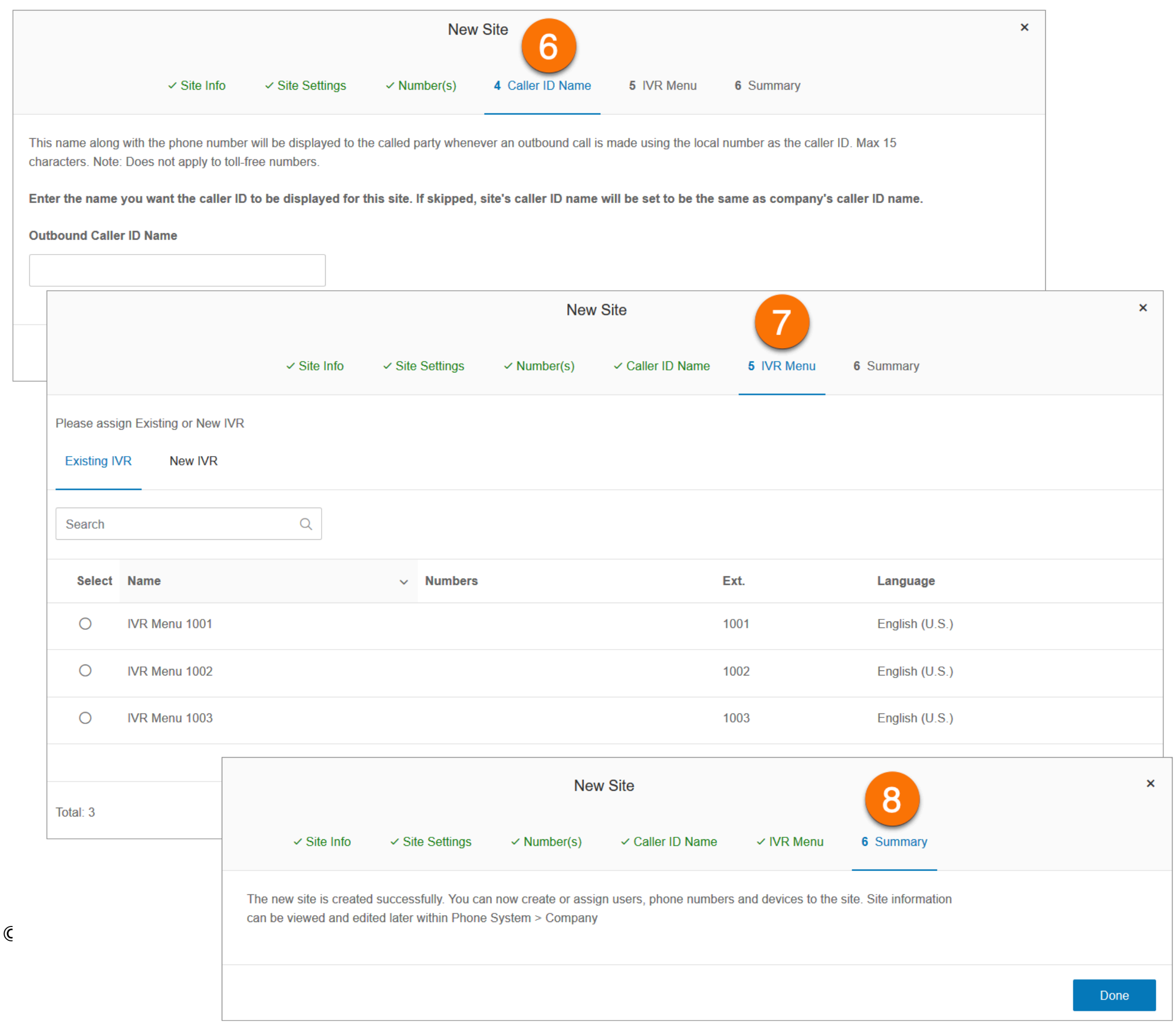
Creating a new site

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**.



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.

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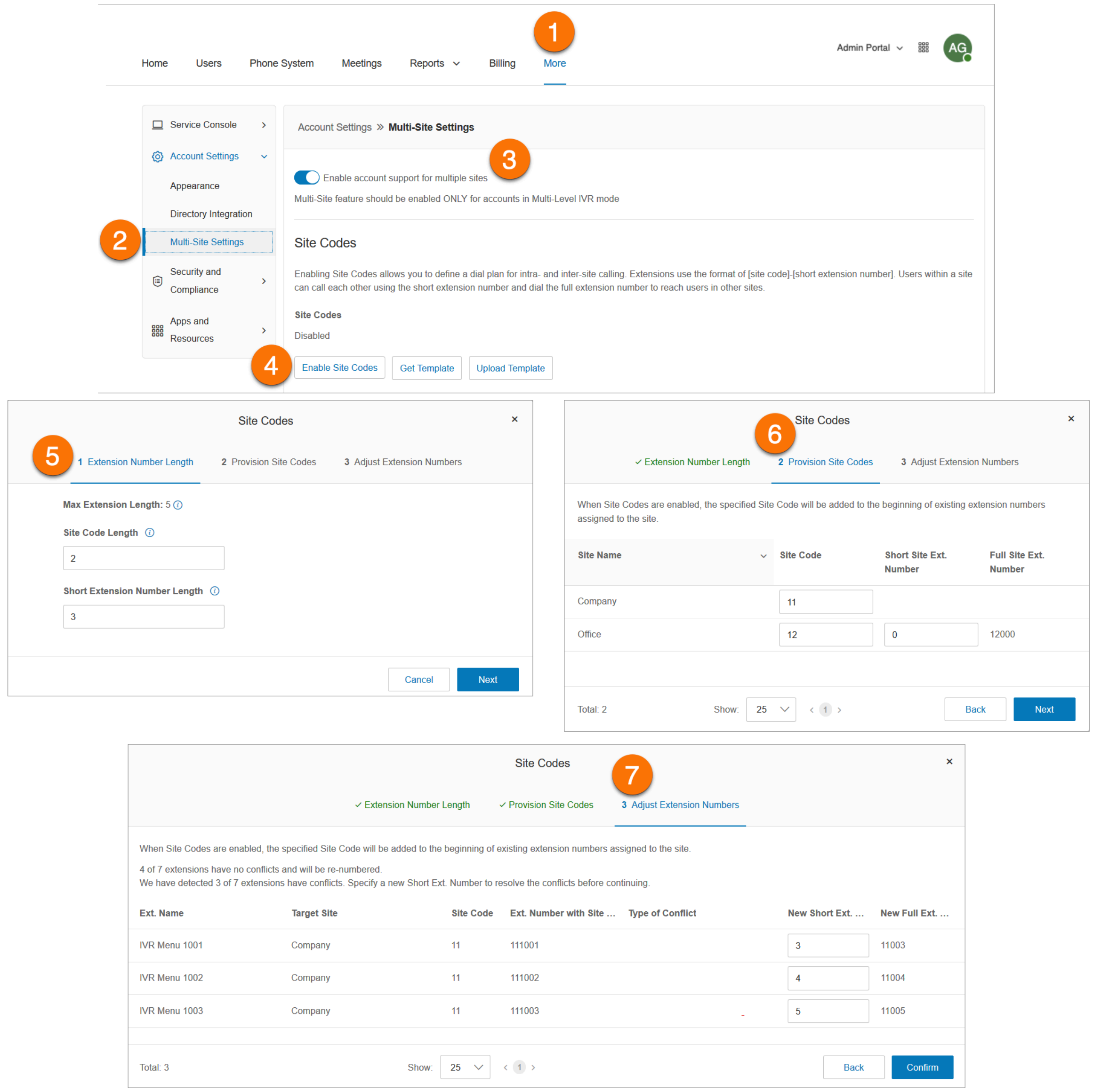

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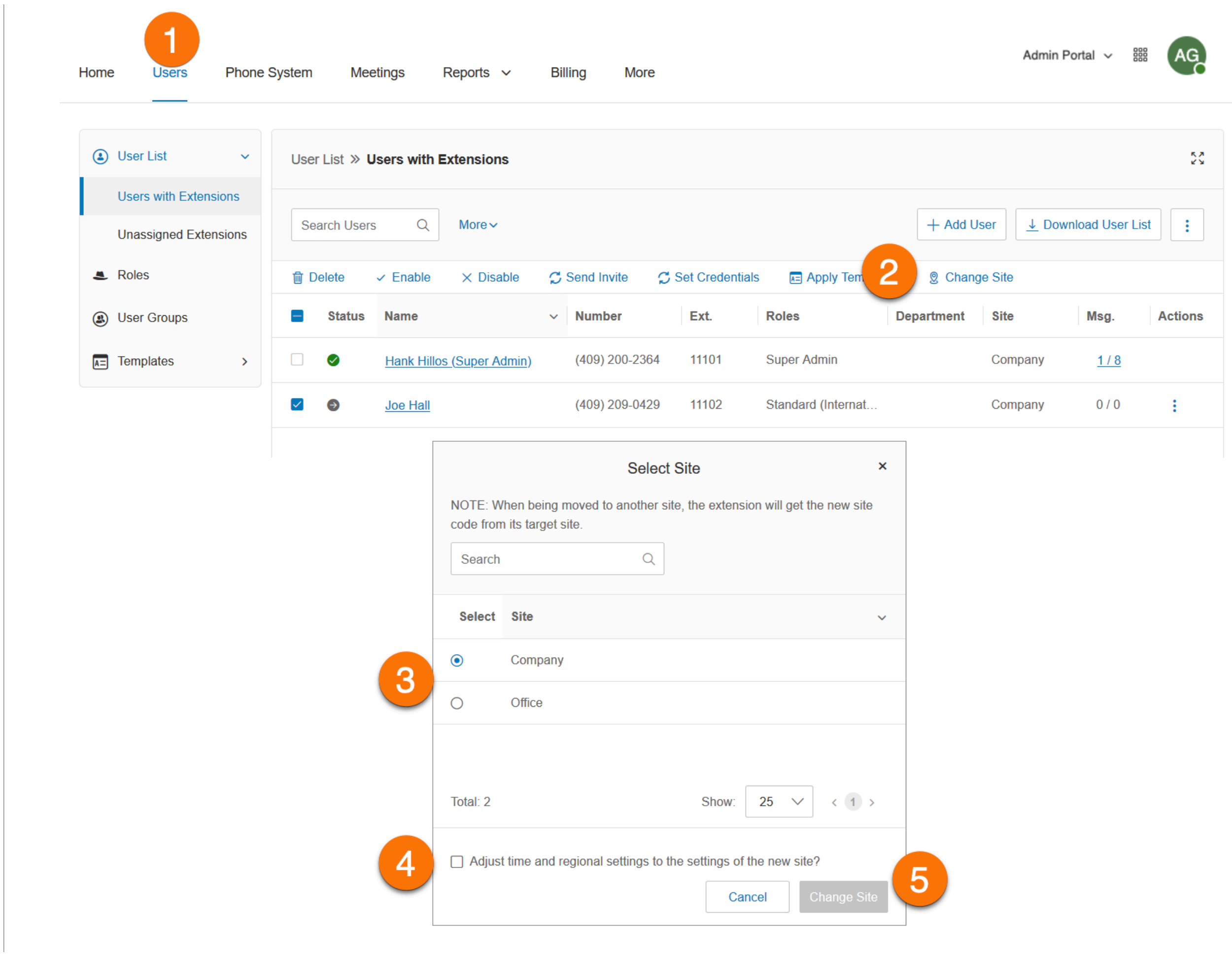
Moving assets across sites

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**.



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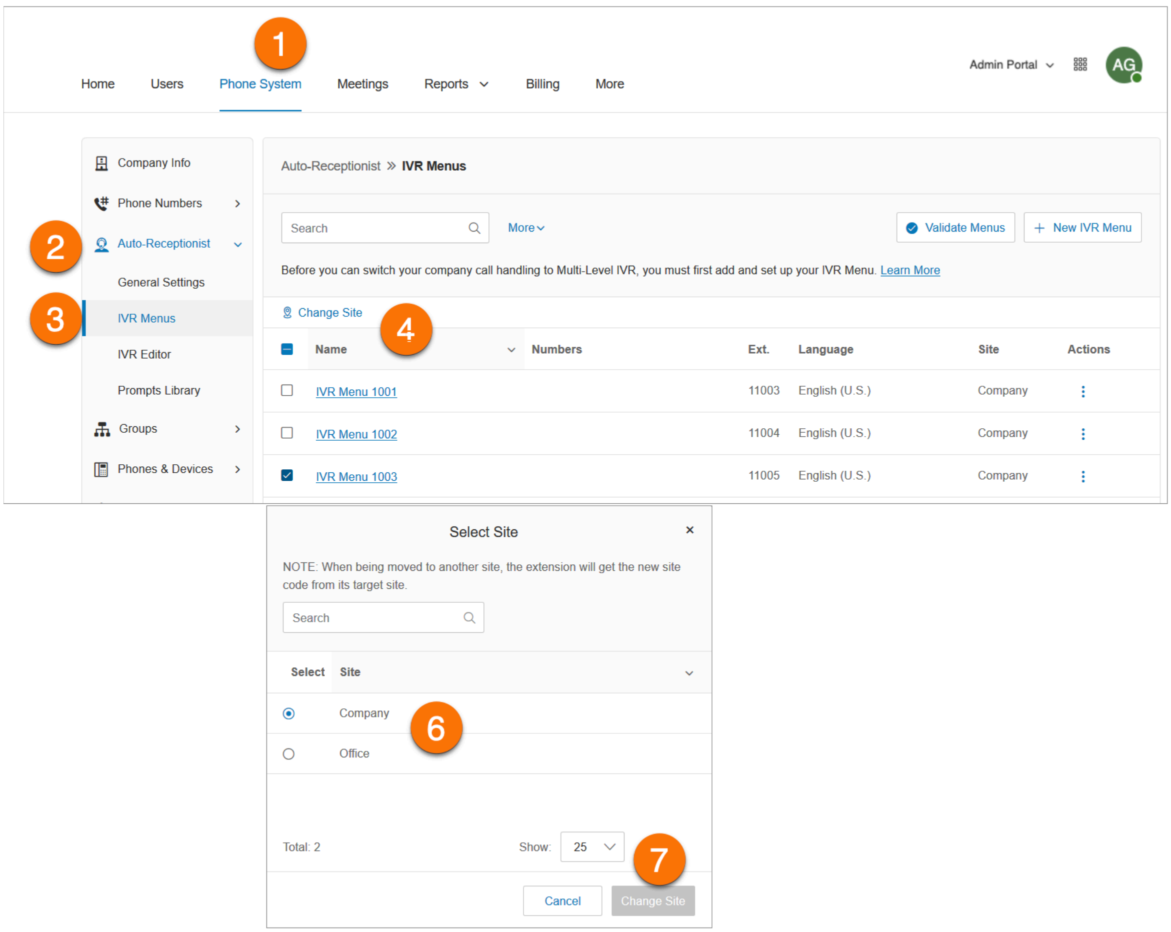
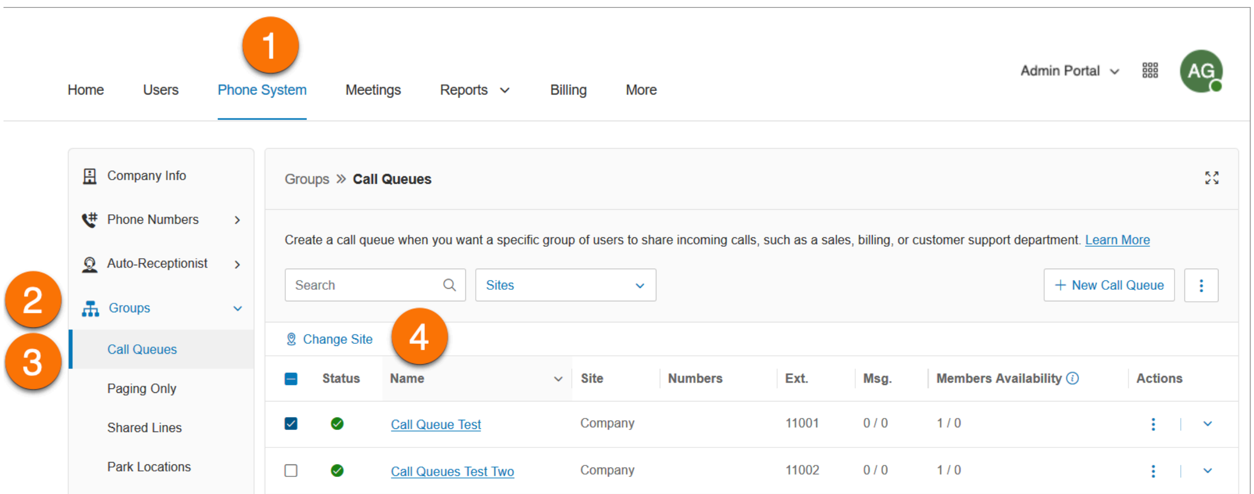
Moving IVR menus across sites

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**.



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**.



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**.

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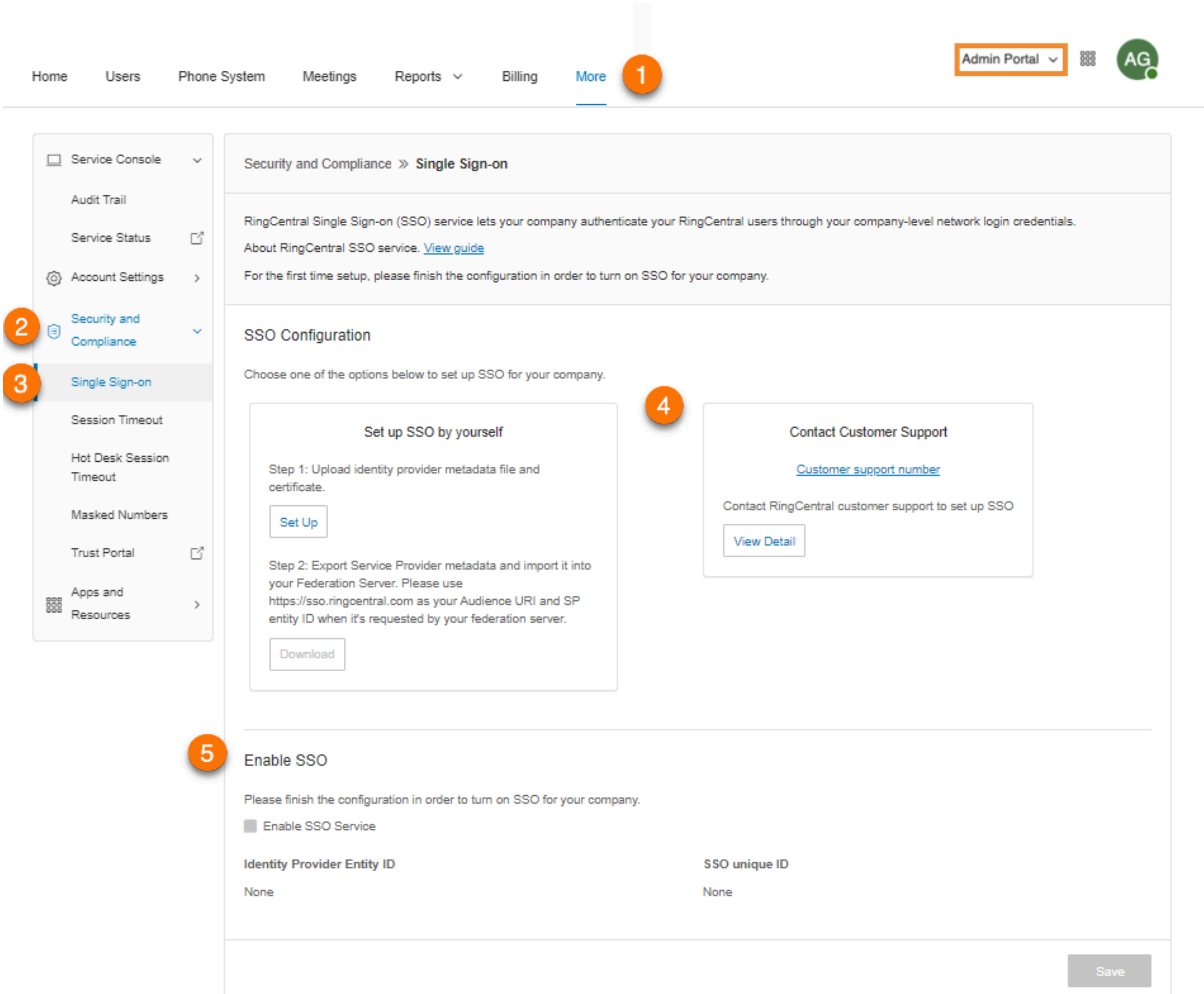
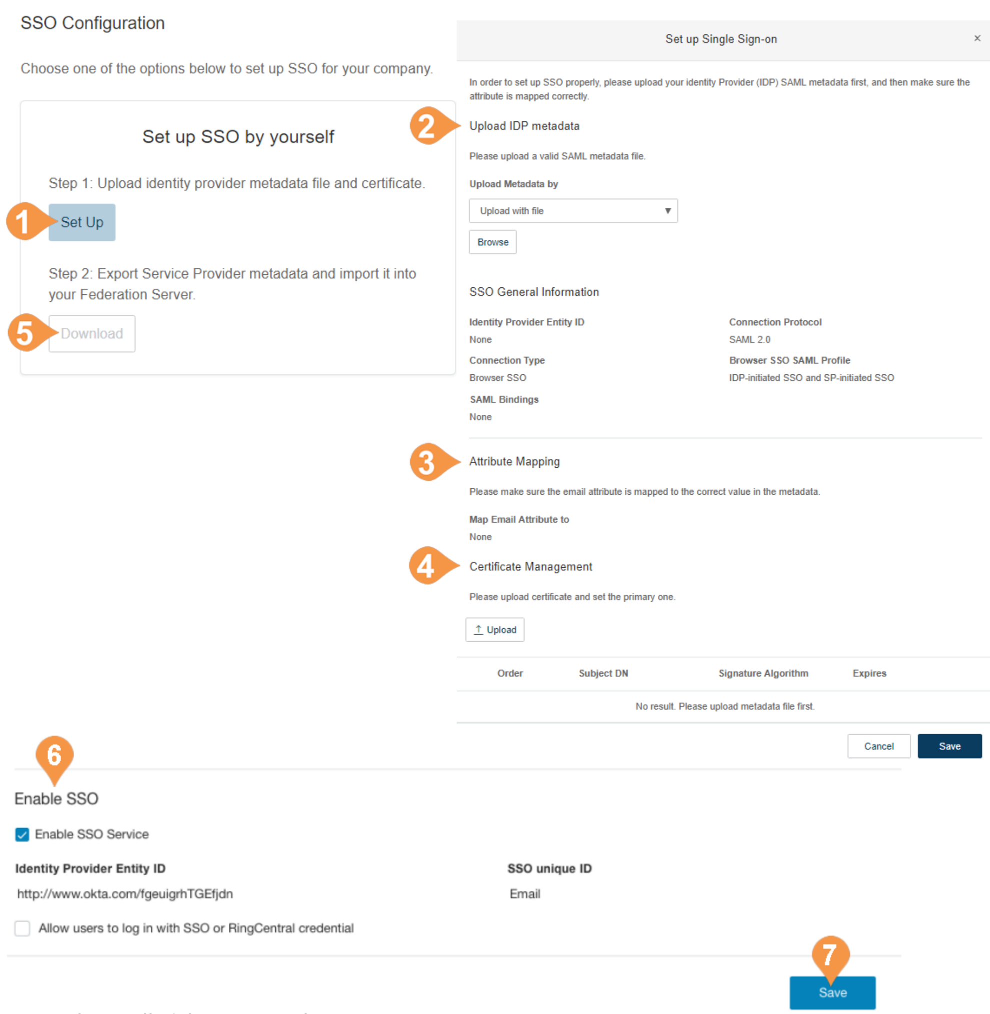

Home
Users
Phone System
Meetings
Reports
Billing
More
1
Admin Portal
AG
Service Console
Audit Trail
Service Status
Account Settings
2
Security and Compliance
3
Single Sign-on
Session Timeout
Hot Desk Session Timeout
Masked Numbers
Trust Portal
Apps and Resources
Security and Compliance » Single Sign-on
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.
4
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
5
Enable SSO
Please finish the configuration in order to turn on SSO for your company.
Enable SSO Service
Identity Provider Entity ID
None
SSO unique ID
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**.



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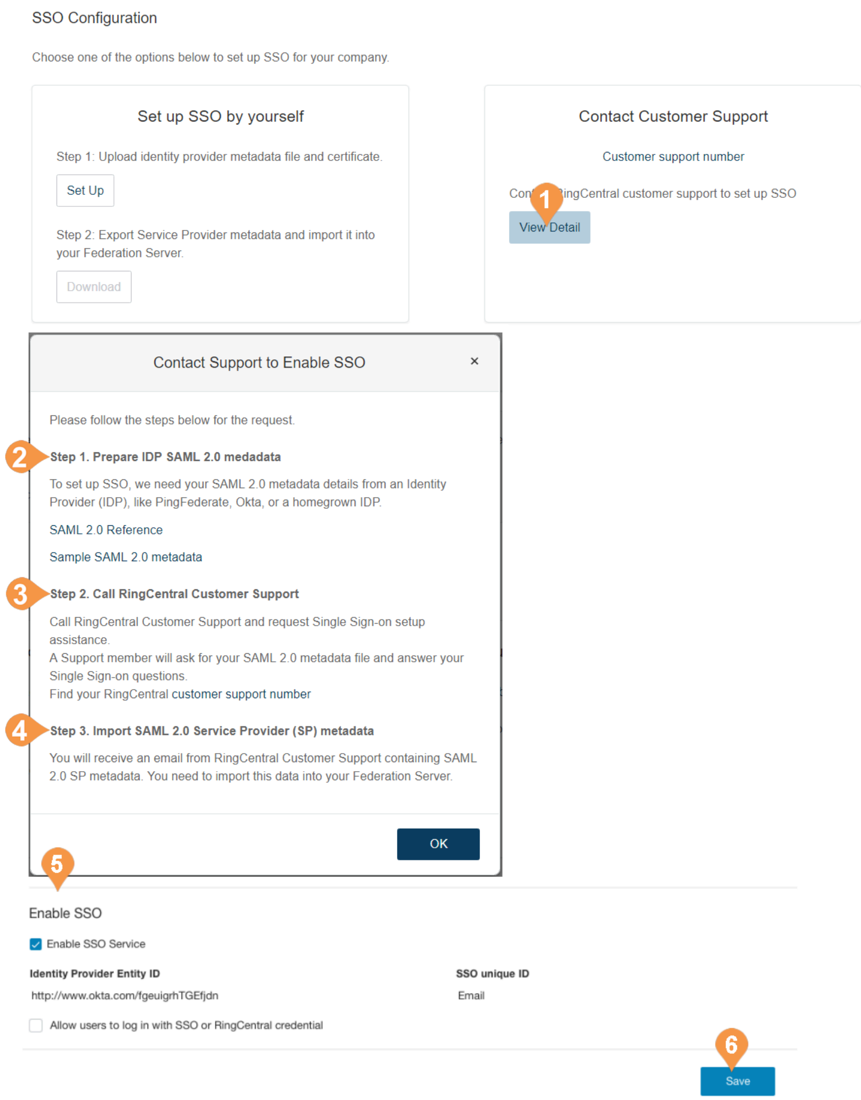
Contacting support to enable SSO

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**.

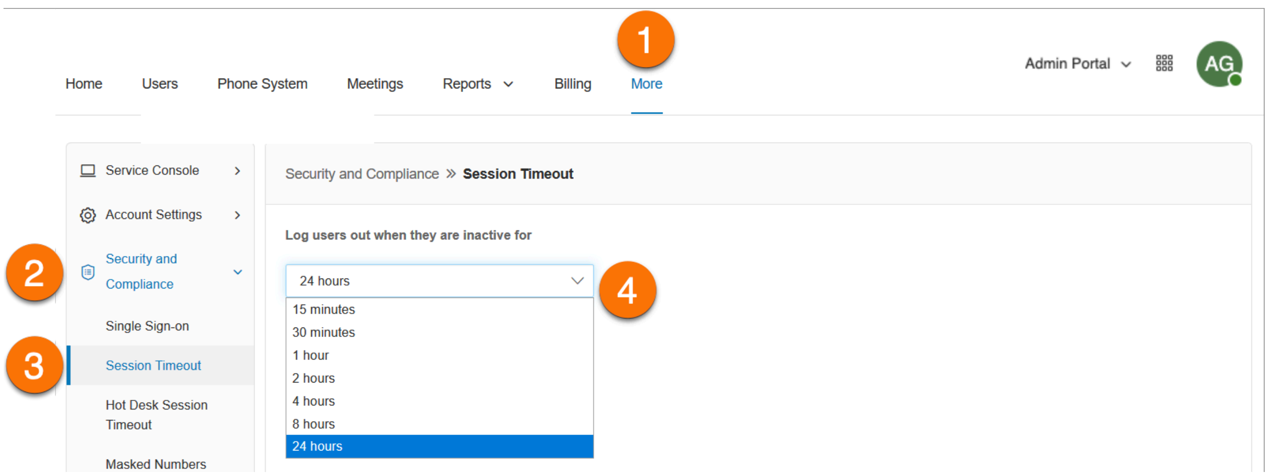


Configuring session timeout

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**.



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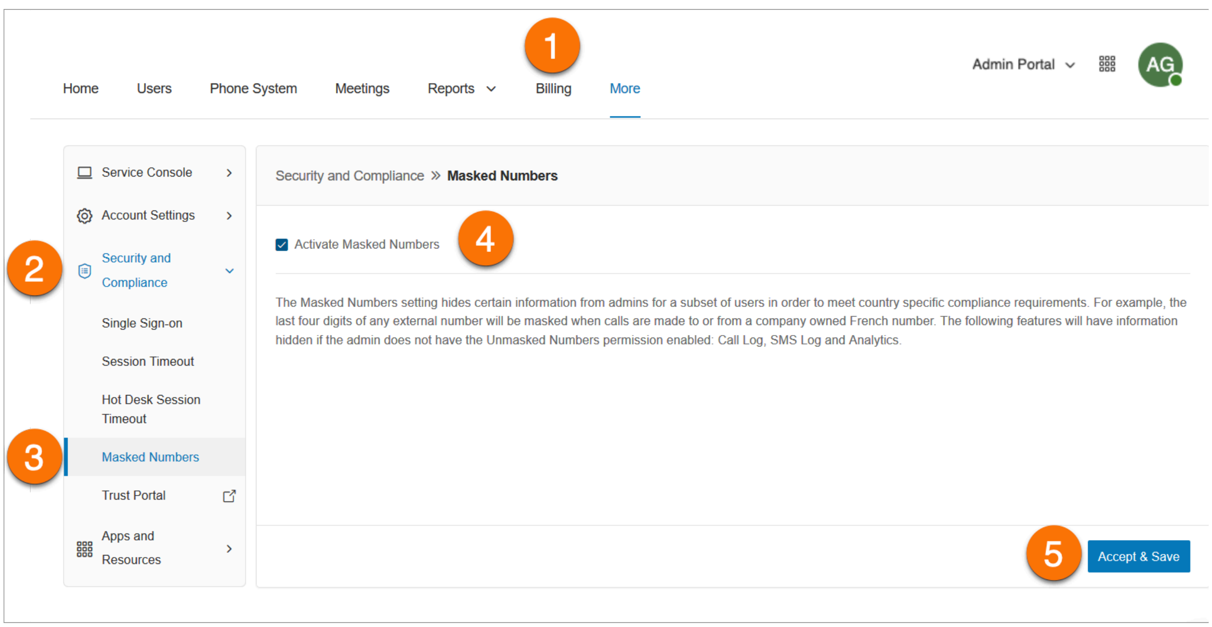
Enabling masked numbers

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.



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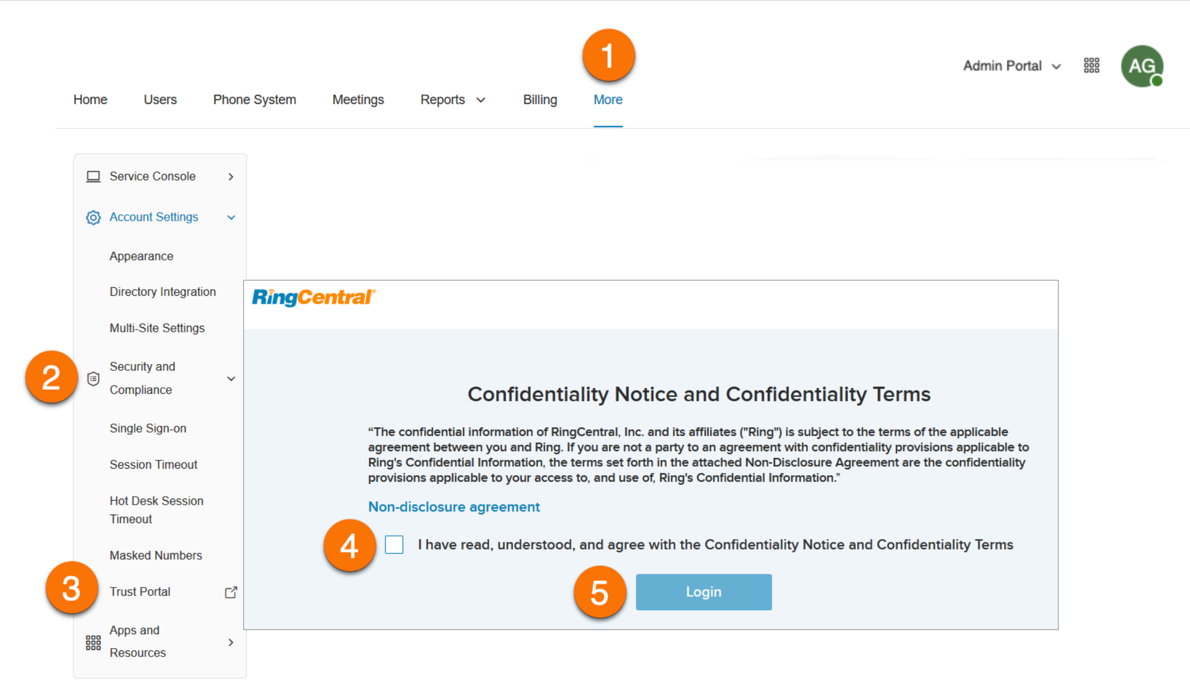
Accessing the Trust Portal

All current RingCentral RingEX, 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.



Mobile app security settings

The **Mobile App Security** section of the RingCentral Online account allows admins to disable third party keyboard on a user's mobile device (iOS only).

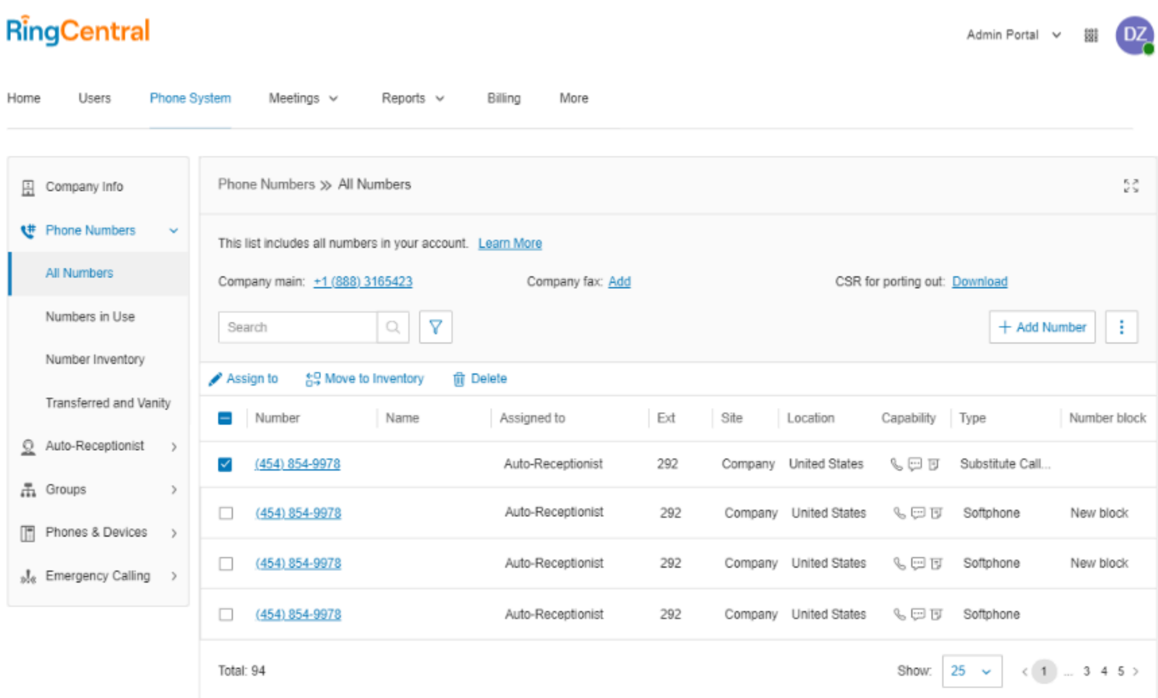
Note: Disabling a third party keyboard prohibits a user from using another keyboard when typing texts which can expose your device to security risks. For iOS and iPadOS 14.5 and later, settings will take effect immediately. For older versions, try restarting or relaunching the app if the settings didn't load.

1. From the Admin Portal, click **More**.
2. Go to **Security and Compliance > Mobile App Security**.
3. Use the checkboxes to turn on or off to allow third party keyboards.

Creating a customer service record for porting numbers

Customers who are in North America and with RC transport can download Customer Service Record (CSR) onthe Admin Portal.

1. Sign in to the Admin Portal.
2. Navigate to **Phone Numbers** > **All Numbers**.
3. Click **Download** next to CSR for porting out.



4. Tick the box next to the site(s) you want to download.

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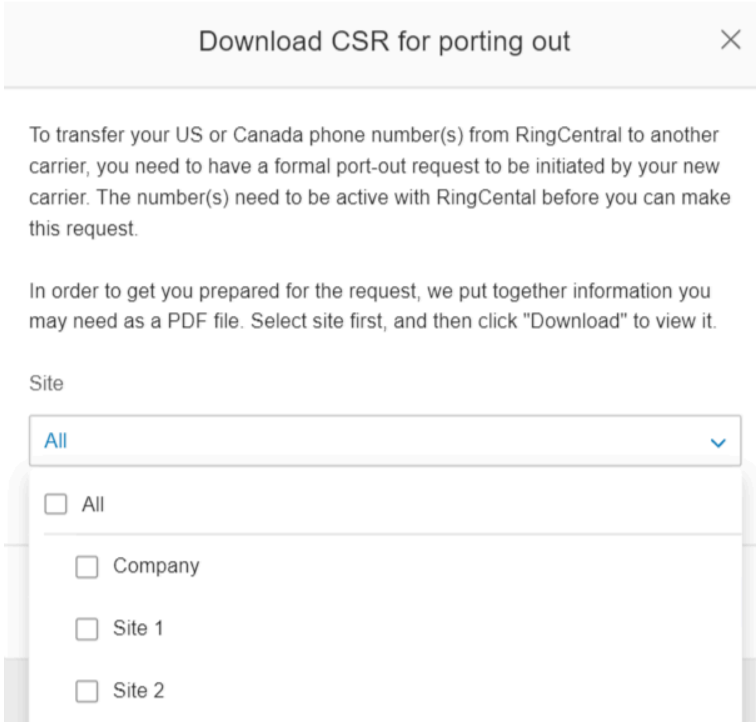

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Apps and resources

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 RingEX Premium and Ultimate customers. It is also available to RingCentral customers in Canada, UK, and Europe.

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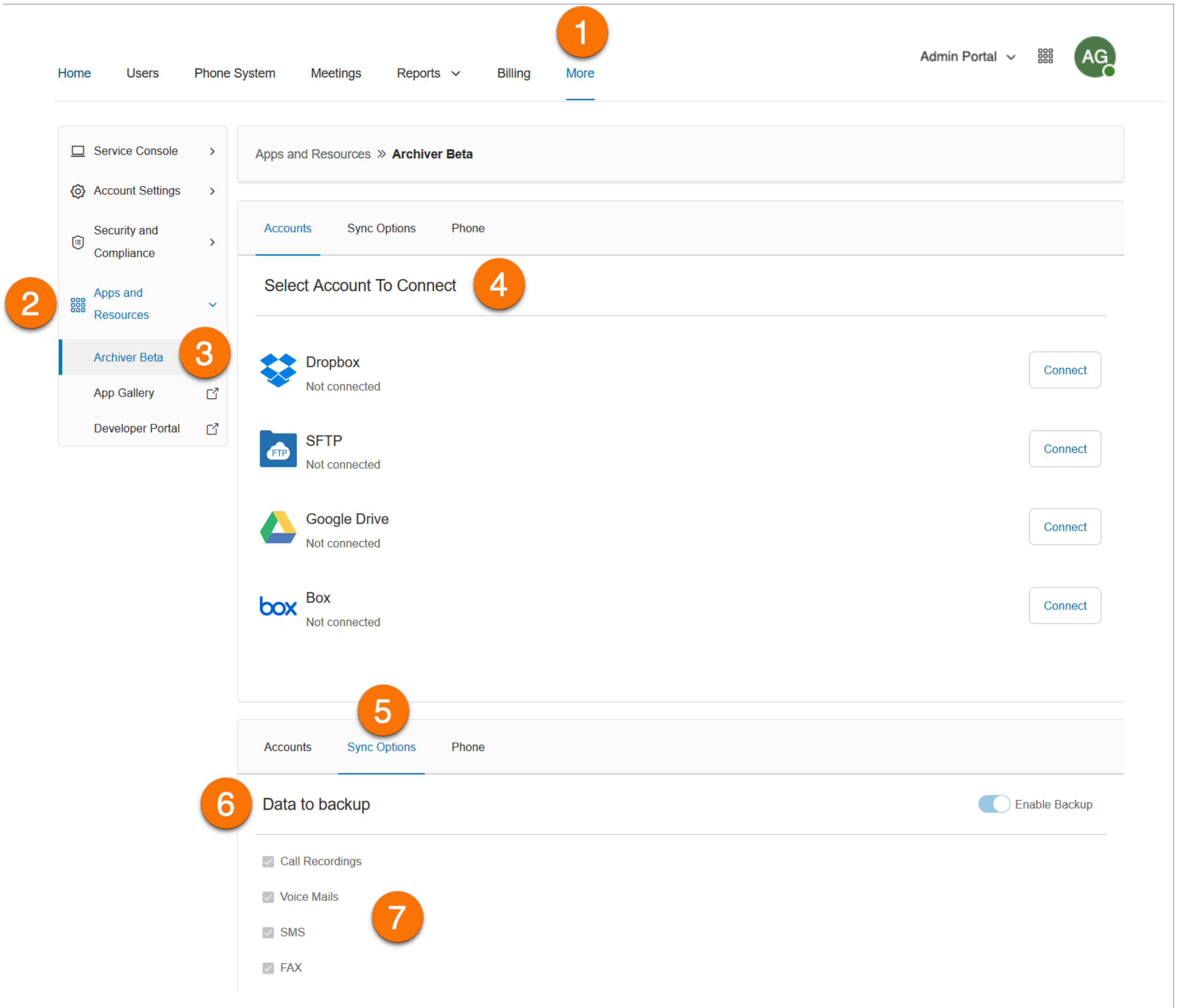

1
Home
Users
Phone System
Meetings
Reports
Billing
More
Admin Portal
AG
Service Console
Account Settings
Security and Compliance
2
Apps and Resources
Archiver Beta
3
App Gallery
Developer Portal
Apps and Resources » Archiver Beta
Accounts
Sync Options
Phone
Select Account To Connect
4
Dropbox
Not connected
Connect
SFTP
Not connected
Connect
Google Drive
Not connected
Connect
Box
Not connected
Connect
5
Accounts
Sync Options
Phone
6
Data to backup
Enable Backup
Call Recordings
Voice Mails
7
SMS
FAX

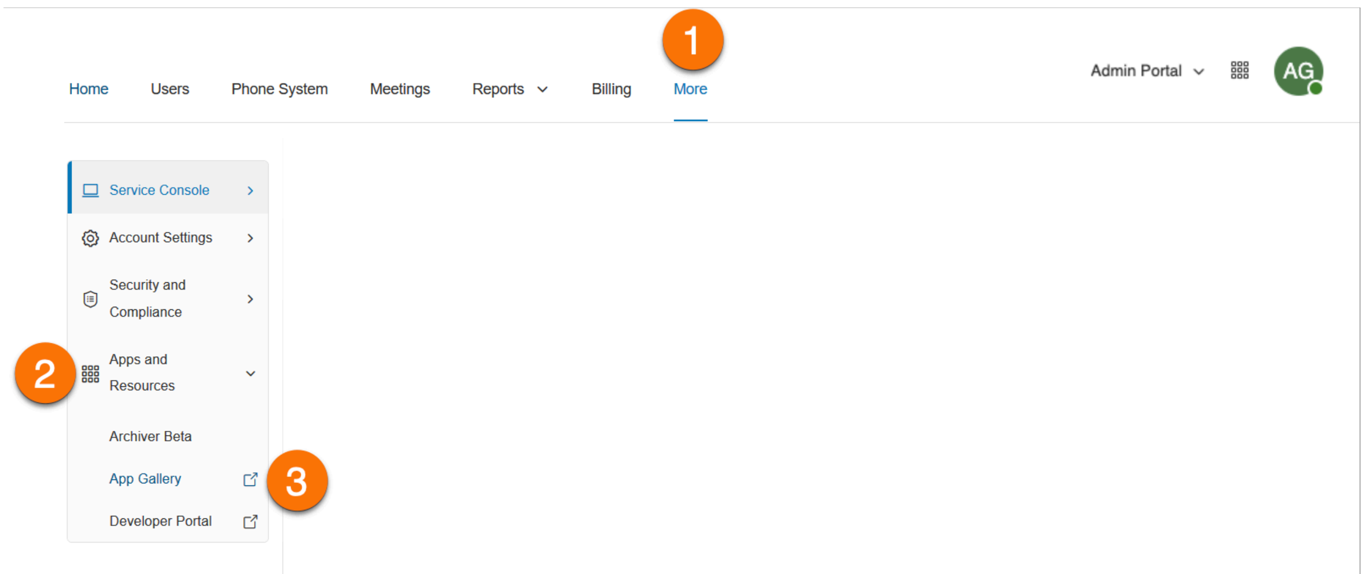
App Gallery

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.

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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 RingEX 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 RingEX 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.

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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.

Registering your numbers with TCR

Mobile carriers implemented a new registration requirement to help verify messaging traffic from business phone numbers, utilizing a third-party service known as The Campaign Registry (TCR). These requirements apply to all RingCentral customers using SMS.

To simplify the process, RingCentral allows you to register with TCR through the Admin Portal. You'll need to register your brand, campaign, and number assignments before enabling SMS. Any numbers not registered with TCR will be disabled for SMS.

Our article, How to enable SMS and campaign registration, explains the details of this requirement.

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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 RingEX 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.

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