

# RingCentral RingEX™

## Admin Guide

V23.1

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# Overview

## Introduction

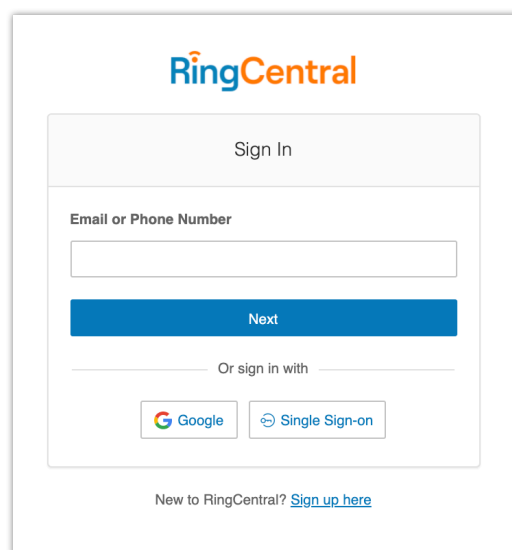
RingCentral is a cloud communications system that delivers unified team messaging, collaboration, and video meetings, coupled with unified voice, fax, and text for businesses of all sizes.

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**.

The image shows a screenshot of the RingCentral 'Sign In' page. At the top is the RingCentral logo. Below it is a light gray box with the title 'Sign In'. Inside this box, there is a label 'Email or Phone Number' above a white input field. Below the input field is a blue button labeled 'Next'. Underneath the 'Next' button is a line of text 'Or sign in with' flanked by two horizontal lines. Below this are two buttons: 'Google' with the Google logo and 'Single Sign-on' with a circular arrow icon. At the bottom of the page, outside the main box, is the text 'New to RingCentral?' followed by a link 'Sign up here'.

## Unified Login

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

## Email or Google as user ID

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

The Google login feature provides users native support for logging in using a Google email address and password. This feature requires a unique Google email address (Gmail or G Suite email). The admin configures a Google email address when assigning an extension, and verifies the uniqueness of the email address. By default, users can log in with their Google email address or other RingCentral credentials.



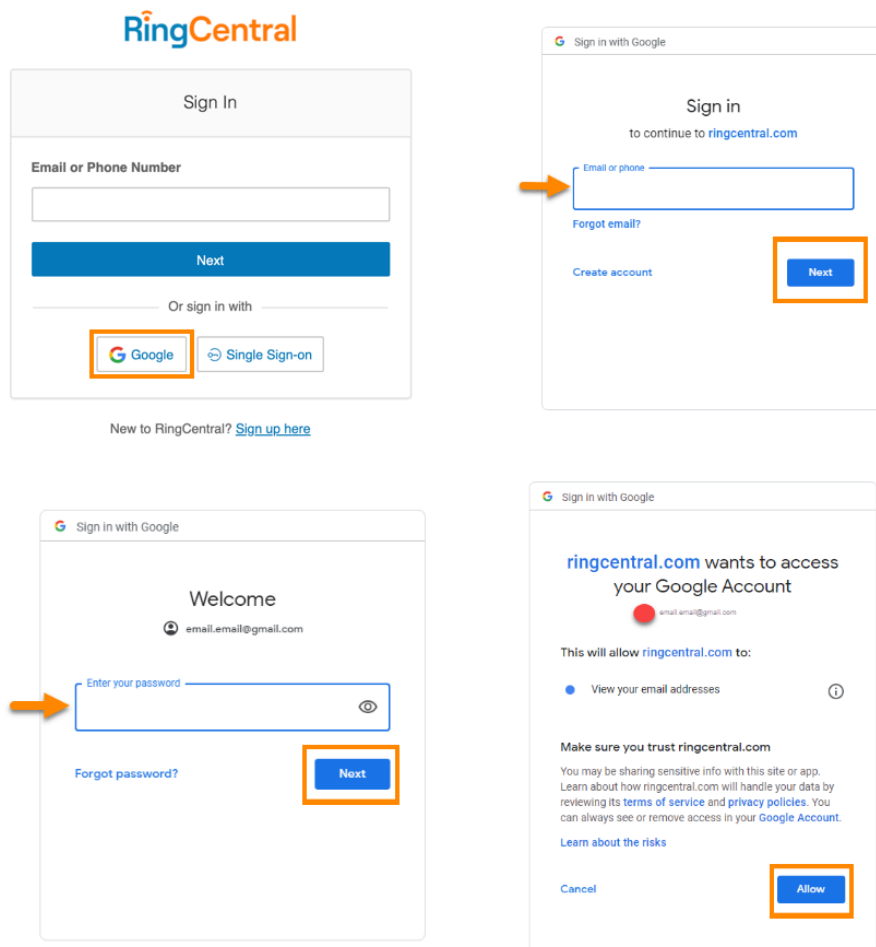
This feature applies to accessing your RingCentral online account through endpoints such as RingCentral app, integration plug-ins for Chrome, and the Multiple Account Access portal. You can configure Google Email addresses during the Express Setup of your RingCentral account.

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

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

To log in using Google, follow these steps:

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



## Single sign-on

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

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

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

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

1. Click the **More** tab from the **Admin Portal**.

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

**Note:** Available for RingCentral Premium and Ultimate users only.

Admin Portal

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

Service Console

Account Settings

**Security and Compliance**

**Single Sign-on**

Session Timeout

Hot Desk Session Timeout

Masked Numbers

Trust Portal

Apps and Resources

Security and Compliance > **Single Sign-on**

RingCentral Single Sign-on (SSO) service lets your company authenticate your RingCentral users through your company-level network login credentials.

About RingCentral SSO service. [View guide](#)

For the first time setup, please finish the configuration in order to turn on SSO for your company.

**SSO Configuration**

Choose one of the options below to set up SSO for your company.

**Set up SSO by yourself**

Step 1: Upload identity provider metadata file and certificate.

[Set Up](#)

Step 2: Export Service Provider metadata and import it into your Federation Server. Please use <https://sso.ringcentral.com> as your Audience URI and SP entity ID when it's requested by your federation server.

[Download](#)

**Contact Customer Support**

[Customer support number](#)

Contact RingCentral customer support to set up SSO

[View Detail](#)

**Enable SSO**

Please finish the configuration in order to turn on SSO for your company.

☐ Enable SSO Service

**Identity Provider Entity ID**

None

**SSO unique ID**

None

[Save](#)

## Account Validation

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

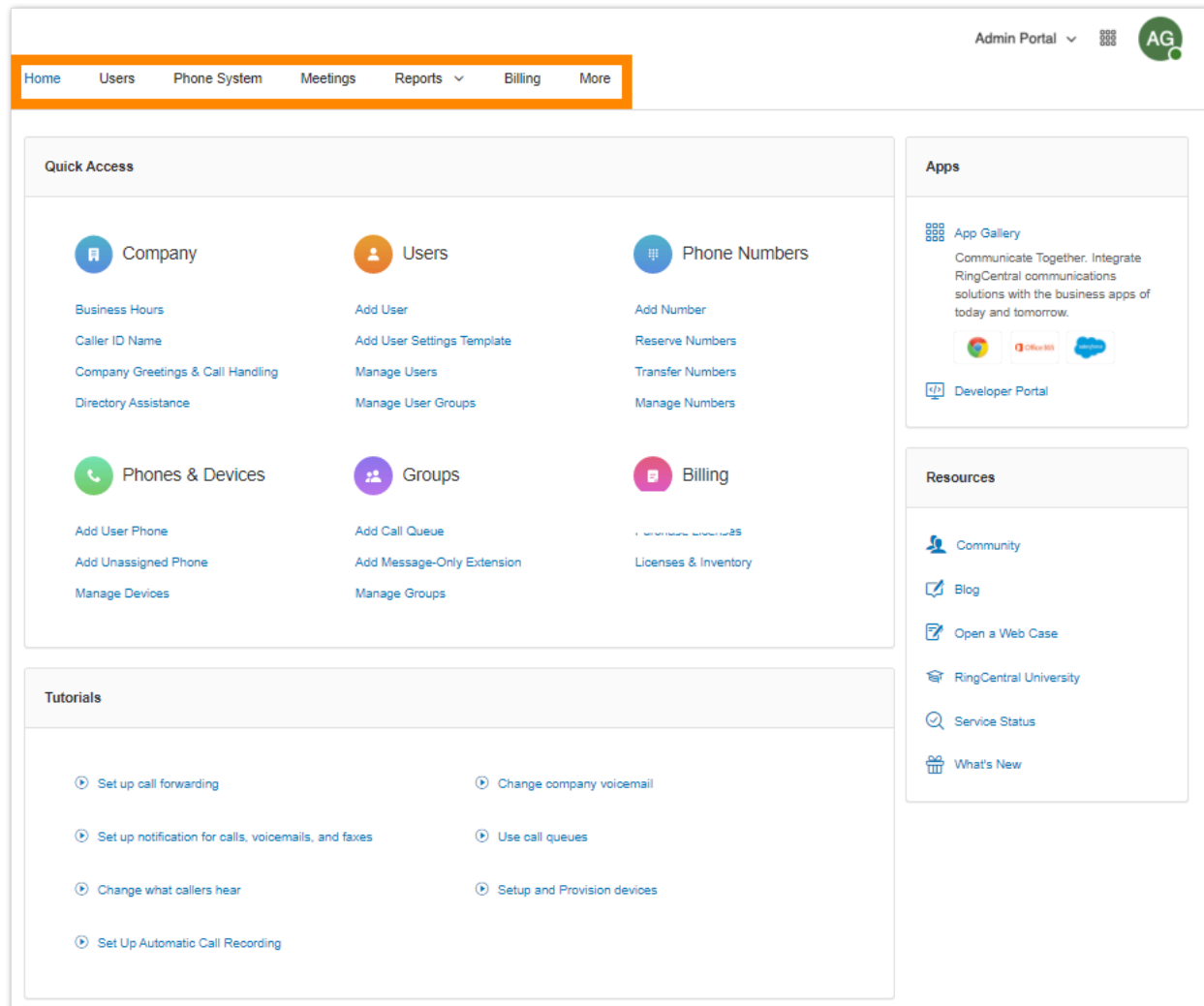
## Admin homepage

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

## Admin Portal

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

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



## My Extension

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

The screenshot displays the 'My Extension' page in the RingCentral Admin Portal. The top navigation bar includes 'Overview', 'Messages', 'Call Log', 'Contacts', 'Settings', and 'More'. The 'Overview' tab is highlighted. Below this, the 'User' tab is selected, showing five settings categories: Greeting & Call Screening, Call Handling Rules, Voicemail, Caller ID, and After Hours Settings. To the right, there are sections for 'Announcements' (Professional Voice Recordings) and 'Resources' (Community, Blog, Open a Web Case, RingCentral University, Service Status, What's New). Below the settings icons, there is a 'Recent Messages' section with a table of messages.

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

## Enterprise Portal

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

### Enabling Enterprise Portal

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

To enable the Enterprise Portal and assign the first admin:

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

### Accessing Enterprise Portal

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

### Searching for accounts

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

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

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



## Adding admins to federated accounts

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

## Managing Enterprise admins

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

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

## Product help

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

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

The image shows a screenshot of the RingCentral Admin Portal interface. On the left is a sidebar with navigation options: Company Info, Phone Numbers, Auto-Receptionist (selected), General Settings (selected), IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling. The main content area is titled 'Auto-Receptionist » General Settings'. It includes a search bar, a table with columns 'Ext.' and 'Name/Type' containing 'Main Site' and '40000 site 2', and sections for 'Company Hours', 'IVR Settings', and 'Custom Answering Rules'. A 'Learn More' link is highlighted in the 'Custom Answering Rules' section. An orange arrow points from this link to a Knowledge Base article titled 'Set up Company Custom Answering Rules'. The article includes metadata (Updated: 27 May 2020, Author: Liezette Cabasis C., Updated By: Mike Joseph I., KB ID: 3387, Page Views: 132,949), a video thumbnail titled 'Adding a Custom Answering Rule to Your Auto-Receptionist', and a list of steps to configure custom rules.

Home > Knowledge base > Set up Company Custom Answering Rules

Was this helpful?

## Set up Company Custom Answering Rules

Updated: 27 May 2020

Author: Liezette Cabasis C.

Updated By: Mike Joseph I.

KB ID: 3387

Page Views: 132,949

Tags: [adding custom rules](#), [adding more options](#), [phone system](#), [advanced call settings](#), [company custom rule](#), [Advanced Call Handling rule](#), [3387](#)

Multi-condition advanced call handling or custom answering rules offer powerful call management capabilities using conditions based on time of day, date range, incoming caller ID and called number. Custom Call Handling Rules are applied before the Business Hours and After Hours rules.

**Adding a Custom Answering Rule to Your Auto-Receptionist**  
from RingCentral University

For more videos like this, visit [RingCentral University](#).

To go to the section where you can configure custom Advanced Call Handling Rules, follow the steps below:

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

Ask RingCentral

## 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.

## Conference commands

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

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

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

Conference Commands

×

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

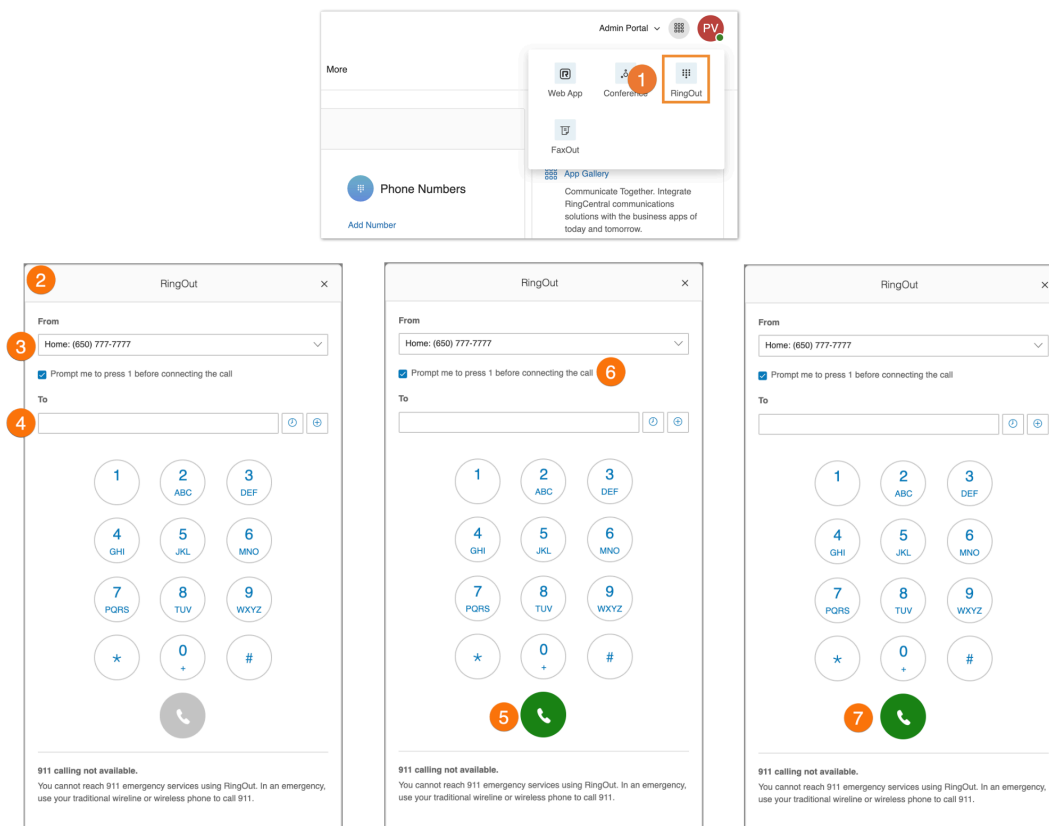
Command	Action
<div> <div>*</div> <div>#</div> <div>2</div> </div>	<b>Caller Count</b> Keep track of how many people are on the call
<div> <div>*</div> <div>#</div> <div>3</div> </div>	<b>Leave Conference</b> Lets the host hang up and end the call
<div> <div>*</div> <div>#</div> <div>4</div> </div>	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

Done

## RingOut

RingOut enables one-touch calling from any phone or internet-enabled computer, allowing you to make calls using your business caller ID from any location, such as a hotel room. The RingOut icon is located in the **App launcher** in the upper right of every online account page.

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

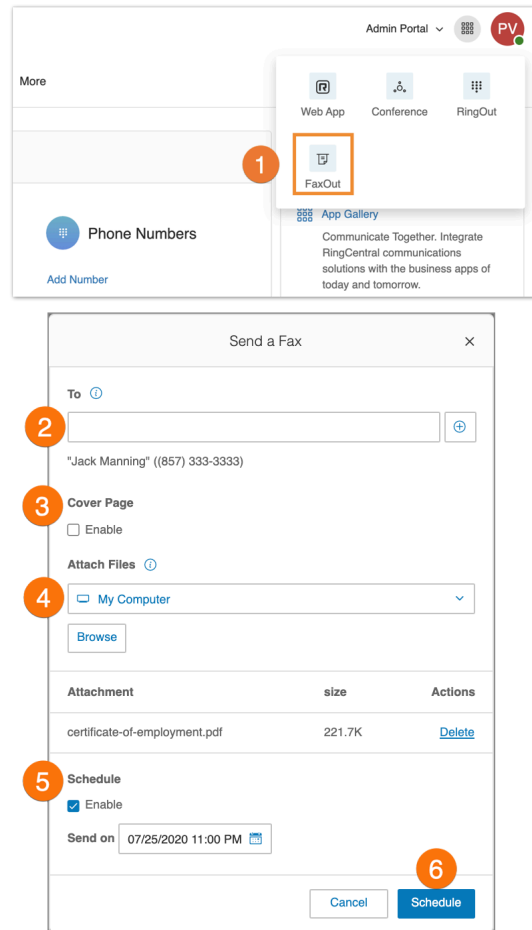


## FaxOut

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

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

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



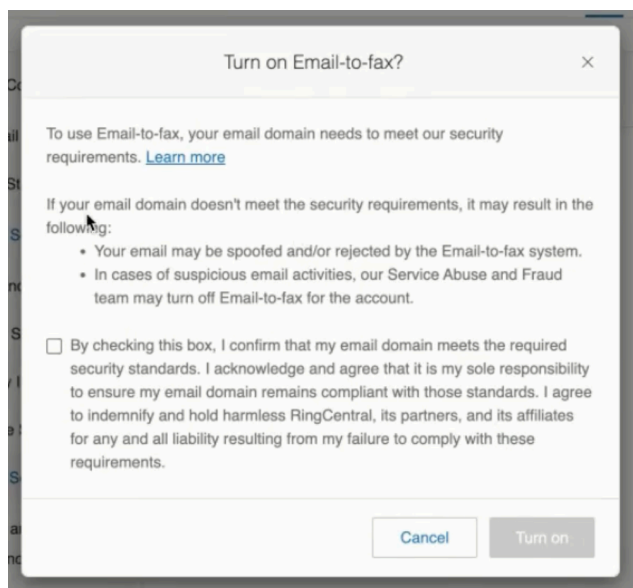
## Managing email-to-fax compliance

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

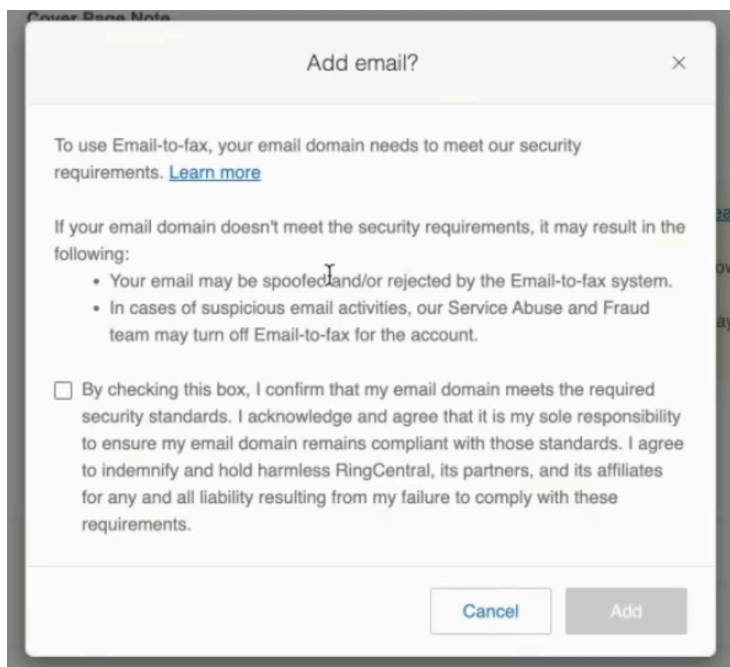
- Email can easily be spoofed, allowing a malicious actor to impersonate customers and send faxes from customers email-to-fax
- E2F are pay per usage and result in large bills or sending to numbers that charge us
- Risk of potential fines from regulatory bodies

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**.



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



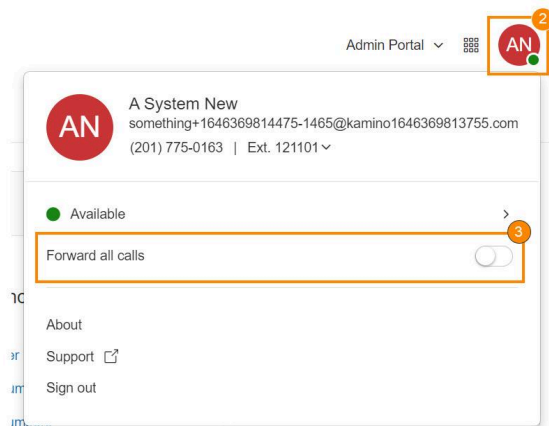
## Setting up the Forward all calls feature

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,

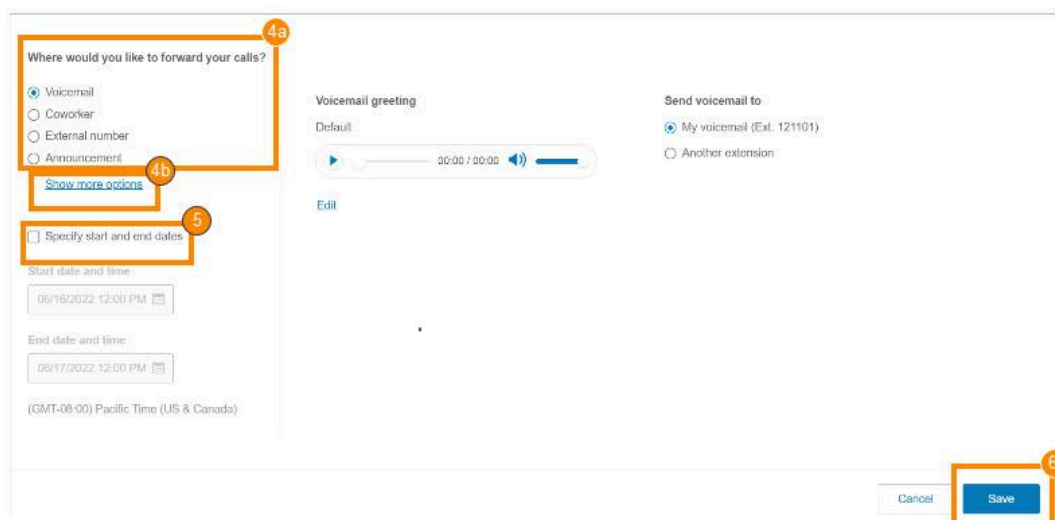


announcement, IVR menu, or other locations. You can also schedule the time period when the incoming calls should be forwarded.

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**.



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.

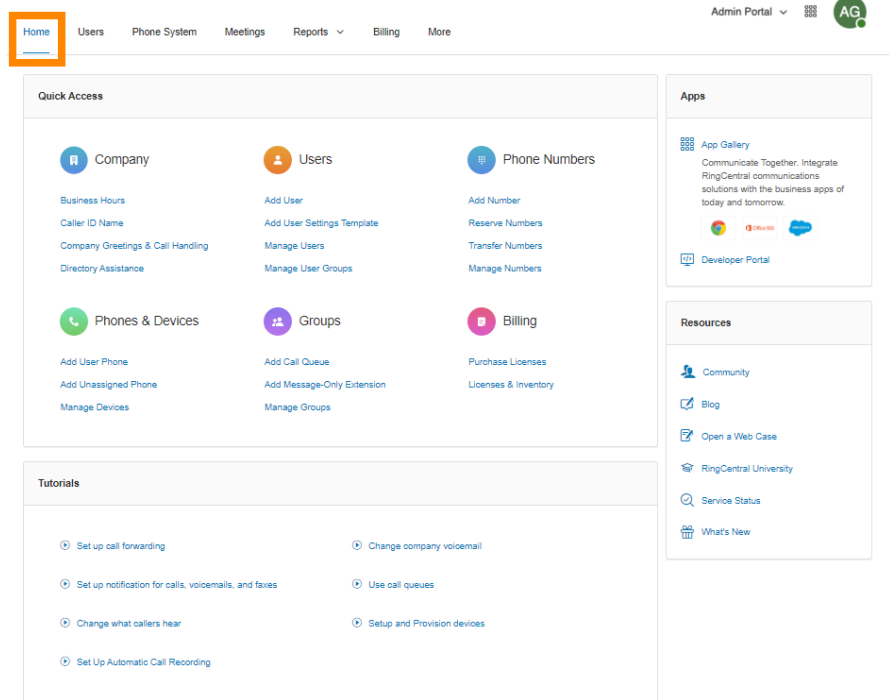
### Note:

- 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.

## Home tab

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

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



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

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

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

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

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

## Managing users

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

### Viewing users with extensions

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Admin Portal' dropdown and 'AG' logo are visible. The navigation bar includes 'Home', 'Users' (highlighted with a red circle 1), 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The left sidebar shows 'User List' (highlighted with a red circle 2) and 'Users with Extensions'. The main content area shows the 'Users with Extensions' table, which lists users with their status and names. The user 'Dulcinea Dunn' is selected (highlighted with a red circle 3). The right panel shows the settings for 'Dulcinea Dunn' (highlighted with a red circle 4), including 'Ext. 11103', 'Outbound Calls/Faxes', 'Meetings', 'Notifications', and sections for 'User Details', 'Phones & Numbers', 'Screening, Greeting & Hold Music', 'Call Handling & Forwarding', and 'Messages'.

## Customizing columns in Users with Extensions list

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

The following columns are available:

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

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

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

## Viewing unassigned extensions

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

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

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

The screenshot displays the RingCentral Admin Portal interface for managing users. The top navigation bar includes links for Home, Users (highlighted with a red circle 1), Phone System, Meetings, Reports, Billing, and More. The right side of the top bar shows the Admin Portal dropdown, a QR code, and the AG logo.

The left sidebar contains a 'User List' dropdown menu with options: Users with Extensions, Unassigned Extensions (highlighted with a red circle 2), Roles, User Groups, and Templates.

The main content area is titled 'User List » Unassigned Extensions'. It features a search bar, a 'Sites' dropdown, and buttons for '+ Add User' and 'Enable All'. Below this is a 'Change Site' section and a table of unassigned extensions.

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

A red circle 3 highlights the first row of the table. At the bottom right, there is a blue button labeled 'Ask RingCentral'.

## Adding users with devices

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

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Users' section is active. The left sidebar shows 'User List' with a dropdown menu containing 'Users with Extensions' and 'Unassigned Extensions'. The 'Users with Extensions' section is selected. The main content area shows a table of users with columns: Status, Name, Number, Ext., Roles, Department, Site, Msg., and Actions. The table lists two users: Aaron Lee and Ada Smith. The 'Add Users' modal is open, showing the 'Add Users' title and a close button. The modal has three steps: 1. Choose User Type, 2. Add User Info, and 3. Setup Options. The 'Office User' option is selected, and the 'Location' dropdown is set to 'United States'. The 'Add Users' modal is also shown over the 'Add Users' button in the 'User List' page.

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

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

- 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.

- 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.

The top screenshot shows the 'Add Users' window with the 'Add User Info' step selected. It displays a table for user details and a dropdown for phone selection.

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

The bottom screenshot shows the 'Select from Phone Inventory' and 'Purchase Phone' options. The 'Select from Phone Inventory' window displays a table of available phones.

Status	Phone Name	Serial No.
<input type="radio"/>	Bob Smith Existing Phone	1234567890
<input checked="" type="radio"/>	Cisco SPA-122 ATA	N/A
<input type="radio"/>	Jack Manning Existing Phone	64167890123
<input type="radio"/>	John qqq Cisco SPA-303 Desk Phone	N/A
<input type="radio"/>	John Smith Cisco SPA-122 ATA	1234567890
<input type="radio"/>	Jack Manning Existing Phone	N/A
<input type="radio"/>	Polycom Trio 8850 Conference Phone	N/A
<input type="radio"/>	Dabbie Smith Cisco SPA-500G Desk Phone	N/A
<input type="radio"/>	Allen Test Existing device	N/A
<input type="radio"/>	ana smith Existing Phone	N/A

The 'Purchase Phone' window displays a grid of available phones with their prices.

Phone Name	Price
Cisco 7941 Gigabit Business Phone	\$209.00
Cisco 8861 Gigabit Color Business Phone	\$329.00
Cisco CP8821 Business IP Phone	\$99.00
Cisco CP8851 Gigabit Color Business Phone	\$249.00
Cisco CP8851 Gigabit Color Business Phone with 1 Expansion Module	\$449.00
Cisco CP8851 Gigabit Color Business Phone with 2 Expansion Modules	\$649.00

- 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.
- 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.
- Click **Next**.



8

Select Number

Number Inventory

New Numbers

Search

Q

Locations

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

Total: 4

Show: 25 < 1 >

Cancel

Done

Add Users

✓ Choose User Type

2 Add User Info

3 Setup Options

Office user licenses available: 946 ⓘ

☒ Require unique email IDs

Email	First Name	Last Name	Cost Center	Site	Ext.	Phone	Number
abcdef.ghijkl222@gmail	Abcdef	Ghijkl	John Smit...	Company	11102	Cisco 8861 G...	(520) 246-5625(In... > ⓘ
1	<div>+ Add</div>						

Shipping Info

[Ship to multiple addresses](#)

9

Select Shipping Address

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

Edit

New

Attention to

Something New

Select Shipping Method

Ground

Select Cost Center

John Smith Company

Order Summary

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

Today's Estimated Total\* \$329.00

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

10

Back

Next

## Setting up users

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

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

### Sending invite to a user

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

### Activating by assigning credentials to a user

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

Note that these are all required fields.

3. Check the box for **Temporary Password** to prompt users to reset the password when they sign in for the first time (optional).
4. Under **Emergency Address**, click **Add** beside the name of users with devices.
5. Fill in the info for the emergency address.
6. Read and understand the important notes about emergency calling service, check the box to acknowledge, then click **I Accept**.
7. Click on **Edit Role** under **Assigned Role** if you want to change the permissions of the user. By default, a user is set to have **Standard User (International)**.
8. Click **Next**. If you click **Next** without doing Steps 4-6, there will be a prompt for **Missing Emergency Address**. You may click **Back to Add Emergency Address** or **Yes** to continue without an emergency

address. If you don't add an emergency address at this point, user(s) will be required to add their emergency address when they log in to their RingCentral online account or RingCentral app.

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

### Activating user at a later time

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

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Users' section is active, and the 'User List' sidebar is open, showing 'Users with Extensions' and 'Unassigned Extensions'. The main area displays a table of users with columns: Status, Name, Number, Ext., Roles, Department, Site, Msg., and Actions. Two users are listed: Aaron Lee and Ada Smith. Below the table, the 'Add Users' modal is open, showing options to add Office Users or Mobile Users. The 'Add Users' modal has a progress bar with three steps: 1. Choose User Type, 2. Add User Info, and 3. Setup Options. The 'Office User' option is selected, and the 'Location' dropdown is set to 'United States'. The 'Mobile User' option is also visible, marked with a '3' and 'FREE' label. A 'Cancel' button is at the bottom right.

1 User List

Users with Extensions

Unassigned Extensions

Roles

User Groups

Templates

User List » Users with Extensions

Search

+ Add User

Download User List

Delete

Enable

Disable

Send Invite

Set Credentials

Apply Templates

Change Site

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

Add Users

1 Choose User Type

2 Add User Info

3 Setup Options

What type of users do you want to add?

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

Location  
United States

Select

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

3 FREE

Select

Cancel

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

## Setting up free users

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

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

### Sending invite to a user

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

### Activating by assigning credentials to a user

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

Note that these are all required fields.

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

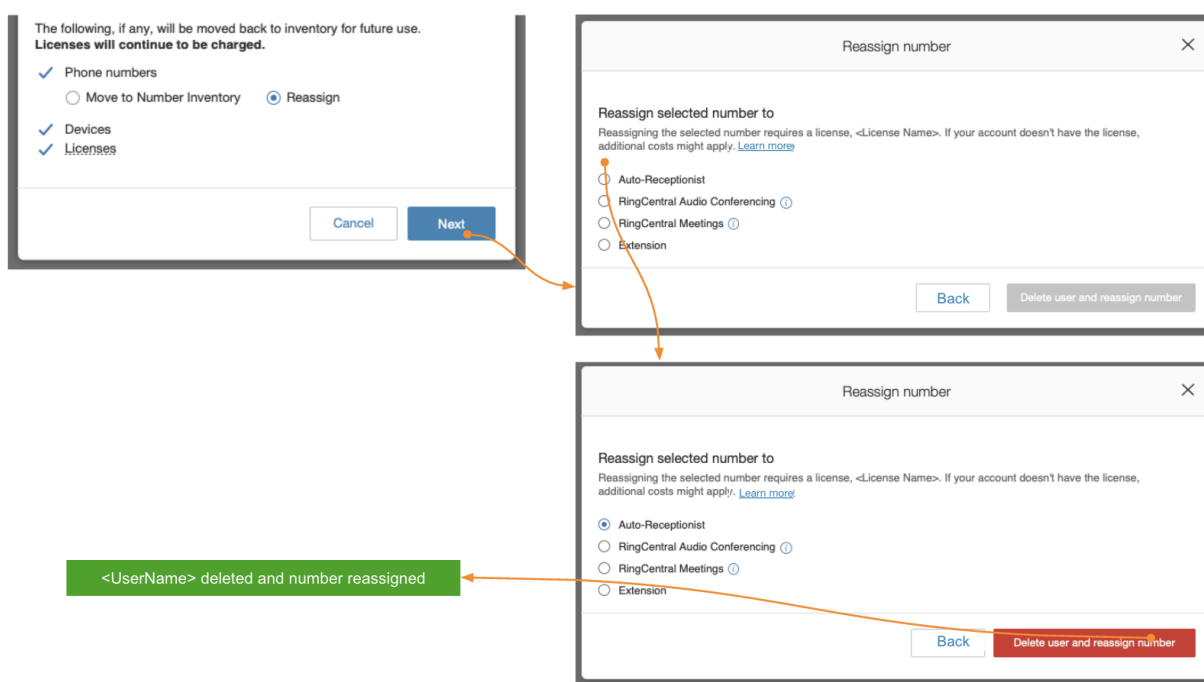
### Activating user at a later time

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

## Deleting users and reassigning phone numbers

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

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



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

## Resetting and assigning a user

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

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

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

The screenshot shows the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users' (selected), 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Admin Portal' dropdown is visible in the top right. The main content area is titled 'User List >> Users with Extensions'. It features a search bar, '+ Add User' button, and 'Download User List' button. Below these are action icons: Delete, Enable, Disable, Send Invite, Set Credentials, Apply Templates, and Change Site. The table lists users with columns: Status, Name, Number, Ext., Roles, Department, Site, Msg., and Actions. The users listed are Buck Strick (Super Admin), Dulcinea Dunn, Joe Hall, and Matt Smith. Matt Smith's status is 'Disabled' (indicated by a red circle). A dropdown menu is open for Matt Smith, showing options: Enable, Reset and Assign (highlighted with a red circle), Copy and Assign, and Delete (highlighted with a red circle). The 'Reset and Assign' option is the third step in the process.

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



Reset and Assign

1 Reset Settings 2 Assign New User

Reset settings for new user

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

4

☒ User Settings

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

☐ Phone Settings  
☐ Presence  
☐ Delegates  
☐ Intercom

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

5

Cancel Next

Reset and Assign

✓ Reset Settings 2 Assign New User

6

Setup Option

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

New User Info

First Name \*

Last Name \*

Email Address \*

Short Extension Number  
104  
Full Extension Number: 11104

☒ Users require unique email IDs  
Verify Email Uniqueness

Mobile Phone

Assigned Role ⓘ  
Standard (International)  
[Edit Role](#)

Contact Phone

Department

Job Title

Site  
Company

Settings

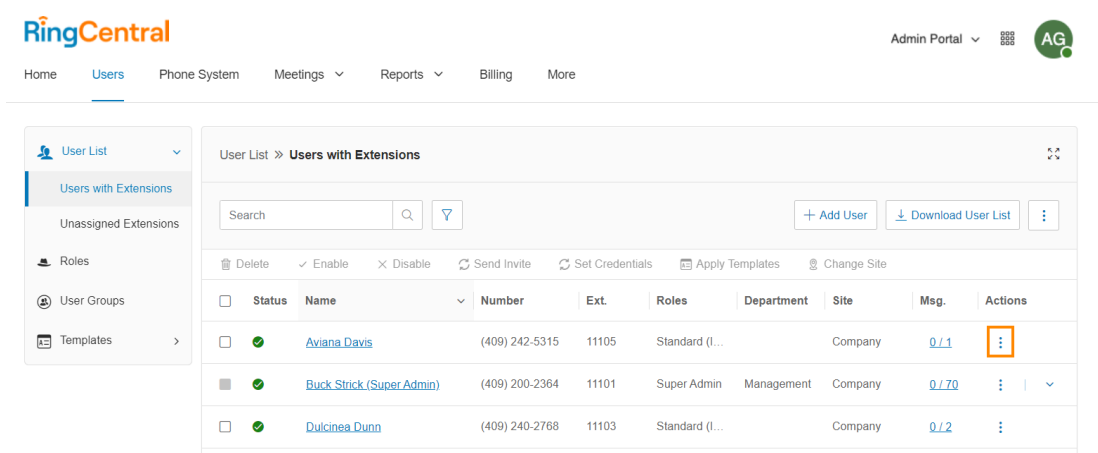
☒ Yes, I would like to receive information on product education, training materials, etc

7

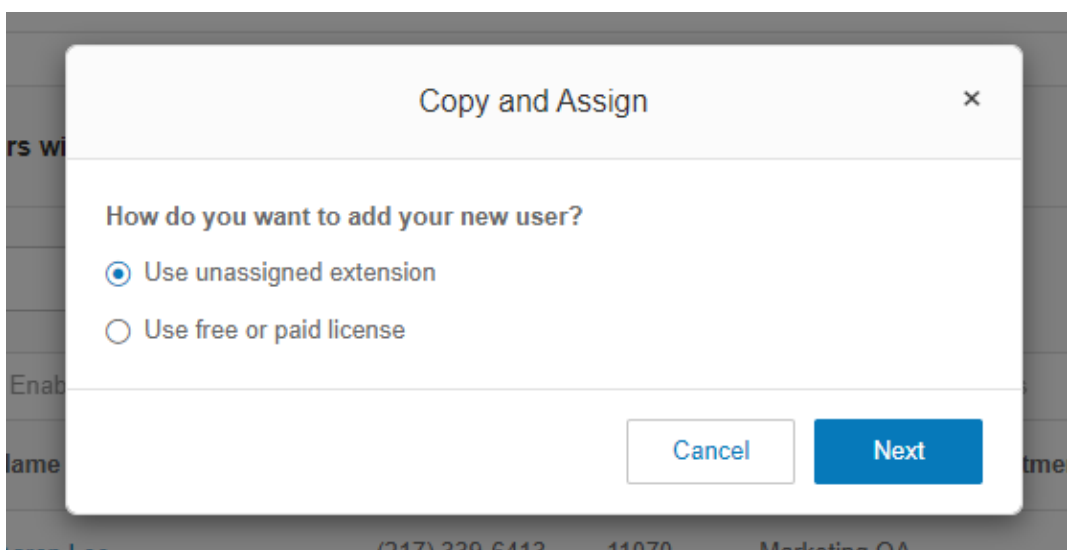
Back Reset and Assign

## Copying and assigning existing user settings using an unassigned extension

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



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



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

Copy and Assign

1 Select Unassigned Extension 2 Copy Settings 3 Assign New User

Users with Devices Users without Devices

Search  Cost Center

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

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

Copy and Assign

✓ Select Unassigned Extension ✓ Copy Settings 3 Assign New User

Setup Option

☒ Send invite ⓘ

☐ Activate by assigning credentials ⓘ

☐ Activate later ⓘ

8. Click **Copy and Assign**.

## Exporting a user list

### Exporting a User List

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

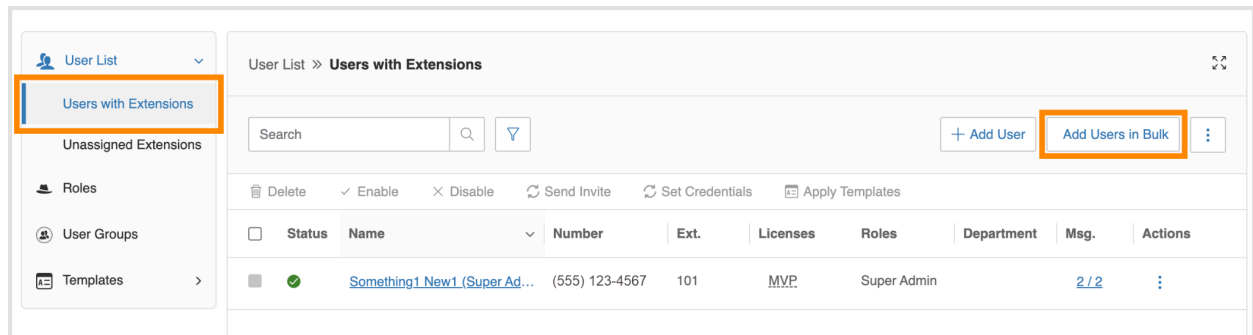
1. Click the **Users** tab from the **Admin Portal**.
2. Click **Download User List** to download a list of users and extensions for audit.
3. View the file in Microsoft Excel.

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

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

## 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**.

Select the columns and column value options to include in the template.

Columns	Column value options
<b>Required:</b>	
<input type="checkbox"/> First Name	user input
<input type="checkbox"/> Last Name	user input
<input type="checkbox"/> Email	user input
<input type="checkbox"/> Emergency Response Location	All <input type="button" value="X"/> <input type="button" value="v"/>
<input type="checkbox"/> Site	Select: 4 selected <input type="button" value="X"/> <input type="button" value="v"/>
<input type="checkbox"/> Cost Center	All <input type="button" value="X"/> <input type="button" value="v"/>
<input type="checkbox"/> Extension	user input
<b>Optional:</b>	
<input checked="" type="checkbox"/> All	
<input checked="" type="checkbox"/> User Template	All <input type="button" value="X"/> <input type="button" value="v"/>
<input checked="" type="checkbox"/> Role	All <input type="button" value="X"/> <input type="button" value="v"/>
<input checked="" type="checkbox"/> Job Title	user input
<input checked="" type="checkbox"/> Department	user input
<input checked="" type="checkbox"/> Mobile Phone	user input
<input checked="" type="checkbox"/> Call Forwarding Number	user input

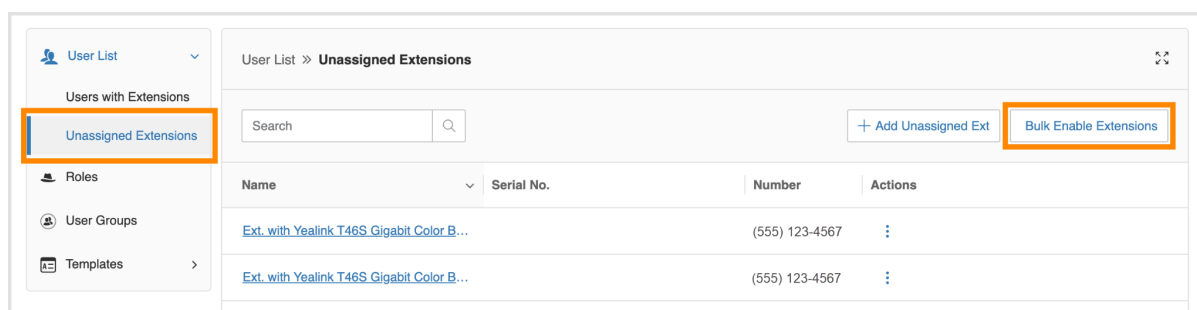
xlsx

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**.

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**.

Select the columns and column value options to include in the template.

Columns	Column value options
<b>Required:</b>	
<input checked="" type="checkbox"/> First Name	user input
<input checked="" type="checkbox"/> Last Name	user input
<input checked="" type="checkbox"/> Email	user input
<input checked="" type="checkbox"/> Emergency Response Location	All
<input checked="" type="checkbox"/> Site	Select: 4 selected
<input checked="" type="checkbox"/> Cost Center	All
<input checked="" type="checkbox"/> Extension	user input
<b>Optional:</b>	
<input checked="" type="checkbox"/> All	
<input checked="" type="checkbox"/> User Template	All
<input checked="" type="checkbox"/> Role	All
<input checked="" type="checkbox"/> Job Title	user input
<input checked="" type="checkbox"/> Department	user input
<input checked="" type="checkbox"/> Mobile Phone	user input
<input checked="" type="checkbox"/> Call Forwarding Number	user input

xlsx

Cancel Download

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.



## 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.

User List » **Users with Extensions**

Search [ ] [ ] [ ]

+ Add User Add Users in Bulk

Delete ✓ Enable ✗ Disable ↻ Send Invite ↻ Set Credentials 📄 Apply Templates

<input type="checkbox"/>	Status	Name	Number	Ext.	Licenses	Roles	Dep
<input type="checkbox"/>	✓	<a href="#">Eric Tester</a>		103	<a href="#">Video Pro</a>	Standard (I...	
<input type="checkbox"/>	✓	<a href="#">Jon Newman (Super Admin)</a>	(212) 333-1397	101	<a href="#">Video Pro</a>	Super Admin	

0 / 0 [ ] [ ]

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**.

Upgrade to MVP licenses in bulk

Upload an Excel file that contains your user's data

To edit licenses, download the template, input info for the users you would like to add, and upload the file below.

Available MVP licenses: 0; Available devices: 0; Reserved numbers: 0

Drag and drop your file here

or

[Upload file](#)

[Download template](#)

Enter the email addresses that should receive a processing report.

Email

[Cancel](#) [Submit](#)

## Converting a virtual extension to a digital line

To convert a virtual extension to a digital line:

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

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

## Managing User Settings

Admins can edit the following user settings:

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

Administrators access and edit settings through the Users panel.

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

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

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

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

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

## User details

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

The image displays two side-by-side screenshots of the 'User Details' form in the RingCentral admin interface. Both screenshots show the 'Super Admin' role and a user named 'Buck Strick'.

**Left Screenshot (General Tab):**

- First Name:** Buck
- Last Name:** Strick
- Job Title:** (Empty field)
- Short Extension Number:** 101
- Full Extension Number:** 11101
- Mobile Phone:** (Empty field)
- Status:** Enabled
- Email:** stricklandpropane135losatosrd@gmail.com
- Record User Name:** Hank Hillos (with an 'Edit' button)
- Department:** (Empty field)
- Contact Phone:** (303) 908-9766
- Verify Email Uniqueness:** (Button)
- Password:** (Empty field with a 'Change Password' button)
- Checkboxes:**
  - ☒ Yes, I would like to receive information on product education, training materials, etc
  - ☒ Send an email when a phone is added
- Buttons:** Copy and Assign, Cancel, Save

**Right Screenshot (Settings & Permissions Tab):**

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

## Managing single sign-on policy

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

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

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

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

To manage SSO policy at the user extension level:

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

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Users' tab is selected in the navigation bar (1). The left sidebar shows the 'User List' menu (2) and the 'Users with Extensions' section (3). The main content area shows a table of users with extensions. The first user, 'Buck Strick (Super Admin)', is selected (3). The 'User Details' panel (4) is open, showing the 'Settings & Permissions' tab (5). Under the 'Single Sign-on' section, the 'Enforce SSO' checkbox is highlighted (6).

## 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.

▼ User Details

^ Phones & Numbers

Phones **Numbers** Conference

+ Add Direct Number

Number	Type	Name	Operation
(555) 123-4567	Direct		<a href="#">Publish</a>   <a href="#">Edit</a>
(555) 123-4567	Direct		<a href="#">Unpublish</a>   <a href="#">Edit</a>

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

^ User Details

**General** Settings & Permissions

First Name  
Catherine

Last Name  
Johnson

Job Title  
UI designer

Extension Number  
105

Mobile Phone

☐ Publish in Company Directory ⓘ

Status  
Enabled  
[Disable](#)

☐ Include User in Company Directory ⓘ  
☒ Yes, I would like to receive information on product education, training materials, etc

Record User Name ⓘ  
00:00 / 00:00

[Edit](#)

Department  
Design

Contact Phone ⓘ

☐ Publish in Company Directory ⓘ

Email  
[Verify Email Uniqueness](#)

Password  
[Change Password](#)



## 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.

<sup>^</sup> **Phones & Numbers**

Numbers

Phones

Conference

+ Add Direct Number

Number	Type	Name	Actions
(623) 555-5555	Direct		<a href="#">Edit</a>
(719) 555-5555	Direct		<a href="#">Edit</a>

<sup>^</sup> **Phones & Numbers**

Numbers

Phones

Conference

+ Add Phone

Presence

Delegates

Intercom

Phone Nickname	Phone Type	Number	Actions
Appointments Specialist ...	RingCentral Ph...	(205) 555-5555	<a href="#">Edit</a>
Existing Phone	Existing Phone	(650) 555-5555	<a href="#">Edit</a>
Jack Manning Cisco SPA-...	Cisco SPA-122...	(213) 555-5555	<a href="#">Edit</a>
Jack Manning Polycom R...	Polycom Trio 8...	(650) 555-5555	<a href="#">Edit</a>
RingCentral Phone app	RingCentral Ph...	(205) 555-5555	<a href="#">Edit</a>
SoftPhone	RingCentral Ph...		<a href="#">Edit</a>

## Primary Number

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

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

To set a user's primary number:

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

The screenshot illustrates the process of setting a user's primary number in the RingCentral Admin Portal. The interface is divided into a top navigation bar, a left sidebar, and a main content area. The 'Users' tab is selected in the top bar. The sidebar shows the 'User List' with 'Users with Extensions' selected. The main content area displays a list of users. The user 'Buck Strick (Super Admin)' is selected, and the 'Phones & Numbers' section is expanded. The 'Primary Number' is currently set to '+44 (20) 45325308'. An 'Edit' button is visible. An 'Edit Primary Number' modal is open, showing a list of numbers to select from. The number '(408) 200-2384' is selected. The modal has 'Cancel' and 'Apply' buttons at the bottom.

## Screening, Greeting & Hold Music

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

### Screening, Greeting & Hold Music

User HoursAfter HoursBlocked Calls

**User Greeting**  
☒ Enable  
Default  
00:00 / 00:00  
Default Greeting: "Thank you for calling Jack Manning"  
Edit

**Call Screening**  
☒ Enable  
If Caller ID not present, ask callers to say their name before connecting.  
Edit

**Connecting Message**  
☒ Enable  
Default  
00:00 / 00:00  
Default Message: "Please hold while I try to connect you."  
Edit

**Audio While Connecting**  
☒ Enable  
Music: Acoustic  
00:00 / 00:00  
Music or Ringtone callers will hear while connecting  
Edit

**Hold Music**  
☒ Enable  
Music: Acoustic  
00:00 / 00:00  
Edit

CancelSave

### Screening, Greeting & Hold Music

User HoursAfter HoursBlocked Calls

**Block option**  
Specific calls and taxes  
Only block these numbers or area codes  
Phone Numbers or Area CodesName (Optional)+ Add

Number	Name	Actions
(857) 222-2222	RingCentral	Delete

**Callers will hear**  
I'm sorry. The number you dialed can not be reached from your calling area. Goodbye.  
00:00 / 00:00  
Edit

**Robocalls**  
**Block option**  
Ring devices and apps  
**Trusted numbers**  
Phone NumberName (Optional)+ Add

**Block calls with no caller ID**  
**Block option**  
None

**Block calls from pay phones**  
☒ Enable block calls from pay phones  
**Callers will hear**  
I'm sorry, the number you dialed cannot accept calls from payphones at this time. Please try your call again later. Goodbye.  
00:00 / 00:00  
Edit

CancelSave



[Learn more about call handling.](#)

## Setting a voicemail greeting

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

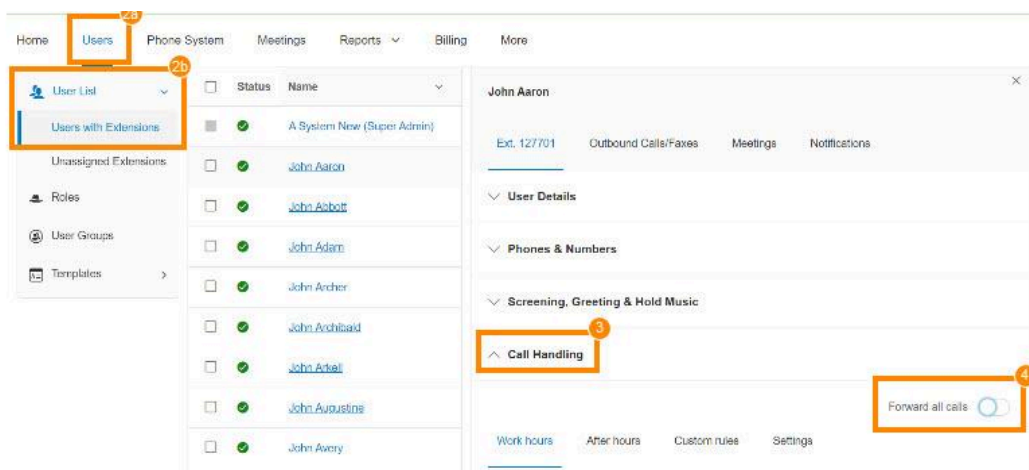
1. Go to the [Admin Portal](#) and sign in.
2. Go to **Users > Users with Extensions**.
3. Click on the user's name. (Don't check the box next to the user's name).
4. Select **Call Forwarding and Voicemail**.
5. Under **Work Hours**, scroll down to **Missed Calls** and select *Send to voicemail* from 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**.



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.

## 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.

## Outbound Calls/Faxes

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

### Outbound Caller ID

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

^ Caller ID

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

By Phone

John Smith Cisco SPA-303 Desk Phone  
(857) 777-7777 - Main Company Number  
Edit

By Feature

RingOut from Web  
(857) 777-7777 - Main Company Number  
Edit

RingMe (Outgoing to Caller)  
(857) 777-7777 - Main Company Number  
Edit

Call Flip  
(857) 777-7777 - Main Company Number  
Edit

Fax Number  
(857) 777-7777 - Main Company Number  
Edit

Mobile App  
Not-specified  
Edit

Additional Desktop App  
(857) 777-7777 - Main Company Number  
Edit

Common Phone  
(857) 777-7777 - Main Company Number  
Edit

Delegated Caller ID  
(857) 777-7777 - Main Company Number  
Edit

Alternate Caller ID  
Not-specified  
Edit

Internal Calls

☒ Display my extension number for internal calls. ⓘ

Cancel Save



## Outbound Fax settings

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

^ Fax Settings

Cover Page Info

This information will be printed on your fax cover page

Company

e.g. John Doe

Country

United States

Street Address

e.g. 120 1st St SW

Additional address (Optional)

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

City

e.g. Alabaster

State/Province

Select State/Province

Zip Code

e.g. 35007

Phone Number

(857) 777-7777 - Main Company Number

Edit

Cover Page

Contempo

Select

Fax Number

(857) 777-7777 - Main Company Number

Edit

Faxes Sent via Email

To enable sending faxes via email from additional email addresses, enter them here. To send a fax via email, [send the fax via faxnumber@rcfax.com](#).

Omit cover page when email subject is blank

On

Off

Email Addresses

Email addresses permitted to send faxes

Email@example.com

Add

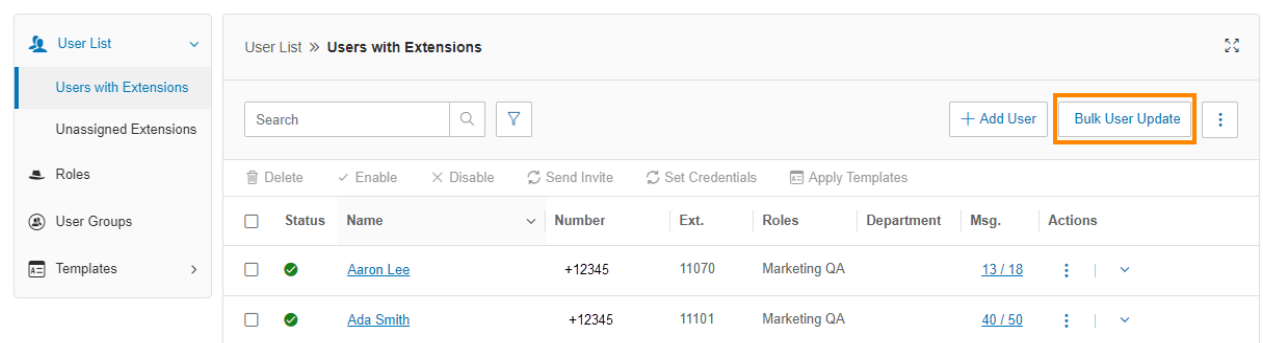
Cancel

Save

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## Bulk adding or editing users

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



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

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

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

## Setting up users

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

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

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

### Activating by assigning credentials to a user

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

Note that these are all required fields.

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

## Managing roles and permissions

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

### Predefined roles

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

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

**Note:** Predefined roles cannot be modified.

### Custom roles

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

**Note:** This feature is available only to RingCentral 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**.

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.

**Roles**

Roles give admins the ability to control what users can do within the system. A role is a collection of permissions which could be based on a job function. **Marketing QA** is assigned to new users by default.

Search Roles [+ New Role](#)

Role Name	Type of Role	Description
<a href="#">Admin - User and Roles</a>	Custom	User and Role Manager
<a href="#">Analytics Portal Manager</a>	Custom	
<a href="#">Billing Admin</a>	Predefined	Billing functions plus Standard International and Manager functions.
<a href="#">CU Test - Meetings</a>	Custom	
<a href="#">Manager</a>	Predefined	Company reporting functionality plus Standard International.
<a href="#">Marketing QA</a>	Custom	
<a href="#">Marketing QA 2</a>	Custom	

**Manager**

[Back](#)

Overview [Assigned Users](#)

Search [+ Assign User](#)

[Remove](#) [Change Administered Sites](#)

Name	Number	Ext.	Department	Site	Role Domain	Actions

**Assign users to role**

Search [Sites](#)

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

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

Total: 8 Show: 25 < 1 2 > [Cancel](#) [Assign](#)

## Modifying a user's role

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

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

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

The left sidebar contains a 'User List' dropdown menu with options: 'Users with Extensions' (selected), 'Unassigned Extensions', 'Roles', 'User Groups', and 'Templates'.

The main content area is titled 'User List » Users with Extensions'. It features a search bar, a 'More' dropdown, and buttons for '+ Add User' and 'Download User List'. Below this is a table of users with columns for 'Status' and 'Name'. The user 'Jack Manning' is highlighted with a red circle 2.

Clicking on 'Jack Manning' leads to the 'User Details' page. The 'User Details' page has tabs for 'General' and 'Settings & Permissions' (highlighted with a red circle 4). Under 'Settings & Permissions', there are sections for 'Regional Settings', 'Roles', and 'Template'. The 'Roles' section shows 'Standard' as the current role, with an 'Edit' button highlighted by a red circle 5.

Other sections visible include 'User Hours' (Custom), 'User Groups' (None), and 'Site' (Company).

## 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.

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

Role Name	Type of Role	Description
<a href="#">Admin - User and Roles</a>	Custom	User and Role Manager
<a href="#">Analytics Portal Manager</a>	Custom	
<a href="#">Billing Admin</a>	Predefined	Billing functions plus Standard International and Manager functions.
<a href="#">CU Test - Meetings</a>	Custom	
<a href="#">Manager</a>	Predefined	Company reporting functionality plus Standard International.

## Setting a default role

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

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

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

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

The first screenshot shows the RingCentral Admin Portal navigation bar with 'Users' highlighted (1). The left sidebar shows 'Roles' selected (2). The main content area displays the 'Roles' page with a search bar and a table of roles. The table has columns for Role Name, Type of Role, and Description. The roles listed are: Admin - User and Roles (Custom), Analytics Portal Manager (Custom), Billing\_Admin (Predefined), CU Test - Meetings (Custom), and Manager (Predefined). The 'Analytics Portal Manager' role is highlighted (3).

Role Name	Type of Role	Description
<a href="#">Admin - User and Roles</a>	Custom	User and Role Manager
<a href="#">Analytics Portal Manager</a>	Custom	
<a href="#">Billing_Admin</a>	Predefined	Billing functions plus Standard International and Manager functions.
<a href="#">CU Test - Meetings</a>	Custom	
<a href="#">Manager</a>	Predefined	Company reporting functionality plus Standard International.

The second screenshot shows the 'Edit' page for the 'Analytics Portal Manager' role (4). The left sidebar shows 'Overview' selected. The main content area shows the role details: Name (Analytics Portal Manager), Type of Role (Custom), and a checkbox for 'Set as Default' (5).



## 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.

The screenshot displays the RingCentral Admin Portal interface for managing user groups. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The left sidebar contains a menu with User List, Roles, User Groups (highlighted with an orange box), and Templates. The main content area is titled 'User Groups' and includes a description: 'A user group gives a group manager access to its members' settings and call logs.' Below this is a search bar labeled 'Search Groups' and a '+ New Group' button. A table lists the existing user groups:

Name	Manager	Description
<a href="#">Billing Team</a>	John Smith	
<a href="#">Customer Service</a>	Julie Andrews	

At the bottom of the page, there is a pagination summary: 'Total: 2', 'Show: 25', and a page indicator '< 1 >'.

The tasks involved in managing user groups include:

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

## Creating a user group

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

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users' (highlighted with a red circle 1), 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Admin Portal' dropdown and a user profile icon 'AG' are on the right. The left sidebar contains 'User List', 'Roles', 'User Groups' (highlighted with a red circle 2), and 'Templates'. The main content area shows the 'User Groups' section with a description: 'A user group gives a group manager access to its members' settings and call logs.' Below this is a search bar and a '+ New Group' button (highlighted with a red circle 3). A table lists existing groups:

Name	Manager	Description
<a href="#">Billing Team</a>	John Smith	
<a href="#">Customer Service</a>	Julie Andrews	

Below the table is a 'Create User Group' modal window. It has three tabs: '1 Describe User Group' (active), '2 Add Members', and '3 Select Group Manager'. The 'Describe User Group' tab contains a 'Name' field (highlighted with a red circle 4) and a 'Description' text area. The 'Description' text area has a placeholder: 'Add a brief description for your group. You may consider including details about the permissions or types of users in this group.' At the bottom right of the modal, there are 'Cancel' and 'Next' buttons, with the 'Next' button highlighted by a red circle 5.

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

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

Create User Group

✓ Describe User Group

2 Add Members

3 Select Group Manager

Search

Department: All

Sites

Show All | Show Selected (2)

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

Total: 29

< 1 2 3 >

Back

Next

Create User Group

✓ Describe User Group

✓ Add Members

3 Select Group Manager

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

Search

Department: All

Sites

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

Total: 2

< 1 >

Back

Done

## Editing or deleting a user group

To edit an existing user group:

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

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

The first screenshot shows the Admin Portal navigation bar with the **Users** tab selected (1). The left sidebar shows the **User Groups** link selected (2). The main content area shows a list of user groups with 'Customer Service' selected (3).

Name	Manager	Description
<a href="#">Billing Team</a>	John Smith	
<a href="#">Customer Service</a>	Julie Andrews	

The second screenshot shows the 'Overview' page for the 'Customer Service' group. The left sidebar shows the **Overview** tab selected (4) and the **Members** tab selected (5). The main content area shows the group details with the **Edit** button highlighted (6).

**Customer Service** [Edit]

**Name**  
Customer Service

**Description**

**Group Manager**  
Julie Andrews | Ext 11105  
[Change](#)

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

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

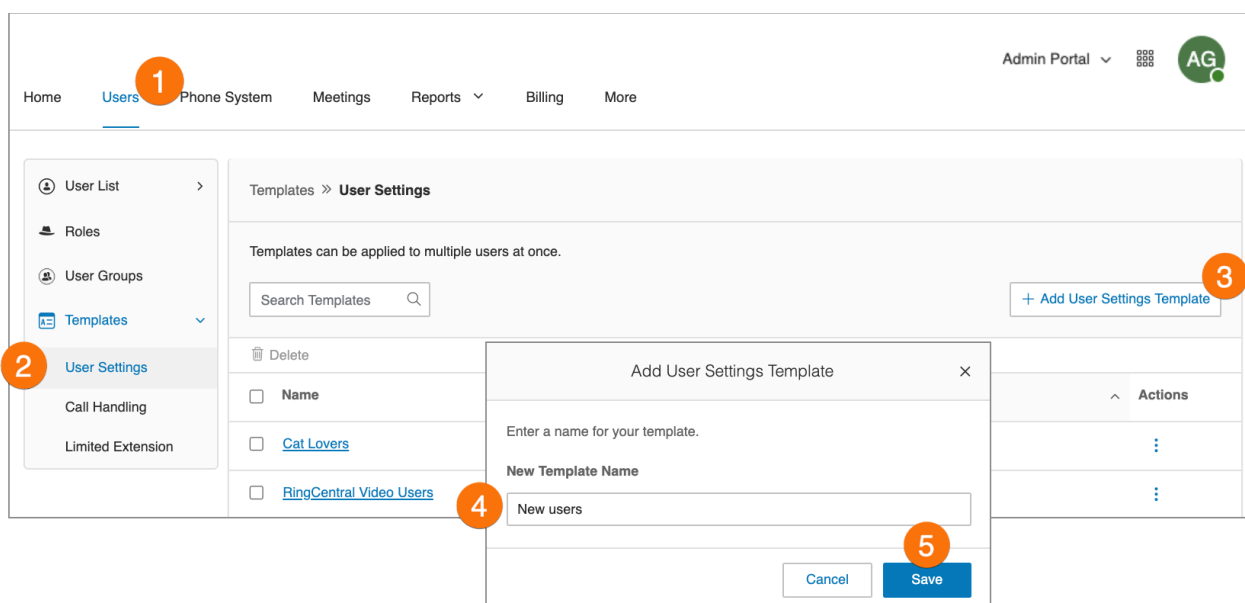
## Managing templates

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

### Creating a template for user settings

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

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



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

Templates » **User Settings**

Templates can be applied to multiple users at once.

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

Delete

**6** ☐ Name

☐ [New users](#)

☐ [Cat Lovers](#)

☐ [RingCentral Video Users](#)

☐ [Support](#)

☐ [Call Queue Manager](#)

☐ [Zfa](#)

☐ [HD](#)

☐ [da](#)

☐ [Technical Support](#)

☐ [Customer Service](#)

☐ [asdasd](#)

☐ [1](#)

< 1 >

**7** **New users**

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

Template Information

**New users**

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

Template Name

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

**8** **New users**

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

Template Information

**User Details**

Settings & Permissions

**Regional Settings**

GMT-08:00, English (U.S.) [Edit](#)

☐ Override User Settings

**Roles** [?](#)

Marketing QA [Edit](#)

☐ Override User Settings

**Site**

Company [Edit](#)

☐ Override User Settings

**Job Title**

☐ Override User Settings

**User Hours**

24 hours [Edit](#)

☐ Override User Settings

**User Groups**

None [Edit](#)

☐ Override User Settings

**Confirmation Message** [?](#)

3 seconds [Edit](#)

☐ Override User Settings

**Video Service** [?](#)

RingCentral Video [Edit](#)

☐ Override User Settings

9. Configure **Phones** settings.

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

**New users** [X]

Inbound Outbound Notifications

Template Information

User Details

**9** Phones

**Presence Settings**

**Appearance**

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

Edit

☐ Override User Settings

**Permissions**

Edit

☐ Override User Settings

**Emergency Address**

Select a country for Emergency Address provisioning.

US/Canada/Puerto Rico

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

**Address**

None

Edit

☐ Override User Settings

**Bandwidth Settings** ⓘ

**Data Usage**

High

☒ Use HD Voice if possible

☐ Override User Settings



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

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

New users

Inbound

Outbound

Notifications

Template Information

User Details

Phones

Screening, Greeting & Hold Music

User Greeting

Enable

Override User Settings

Connecting Message

Enable

Default

00:00 / 00:00

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

Edit

Override User Settings

Call Screening

Enable

Override User Settings

Audio While Connecting

Enable

Music: Acoustic

00:00 / 00:00

Music or Ringtone callers will hear while connecting

Edit

Override User Settings

Hold Music

Enable

Music: Acoustic

00:00 / 00:00

Edit

Override User Settings

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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.

New users

Inbound

Outbound

Notifications

Template Information

User Details

Phones

Screening, Greeting & Hold Music

11 ^ Call Handling & Forwarding

User Hours

After Hours

Settings

Desktop & Mobile Apps

☒ Notify my Desktop & Mobile Apps ⓘ

Wait Time

Select the time before forwarding begins

1 Ring / 5 Secs ▾

☐ Override User Settings

12. Configure **Messages** settings.

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

New users

Inbound

Outbound

Notifications

Template Information

User Details

Phones

Screening, Greeting & Hold Music

Call Handling & Forwarding

12

Messages

User Hours

After Hours

Settings

Take Messages

☒ Enable

Voicemail Greeting

Default

00:00 / 00:00

Edit

☐ Override User Settings

Message Recipient

☒ Do not override user's settings
 ☐ This Extension ⓘ
 ☐ Specific Extension

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.

New users

Inbound

Outbound

Notifications

Caller ID

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

By Phone

(857) 777-7777 - Main Company Number

Edit

☐ Override User Settings

By Feature

RingOut from Web

(857) 777-7777 - Main Company Number

Edit

☐ Override User Settings

RingMe (Outgoing to Caller)

(857) 777-7777 - Main Company Number

Edit

☐ Override User Settings

Call Flip

(857) 777-7777 - Main Company Number

Edit

☐ Override User Settings

Fax Number

(857) 777-7777 - Main Company Number

Edit

☐ Override User Settings

Mobile App

Not-specified

Edit

☐ Override User Settings

Additional Desktop App

(857) 777-7777 - Main Company Number

Edit

☐ Override User Settings

Common Phone

(857) 777-7777 - Main Company Number

Edit

☐ Override User Settings

Delegated Caller ID

(857) 777-7777 - Main Company Number

Edit

☐ Override User Settings

Alternate Caller ID

Not-specified

Edit

☐ Override User Settings

Internal Calls

☒ Display my extension number for internal calls.

☐ Override User Settings

Inbound

Outbound

Notifications

Caller ID

Fax Settings

Cover Page Info

This information will be printed on your fax cover page

☐ Override User Settings

Company

e.g. John Doe

Country

Select Country

Street Address

e.g. 120 1st St SW

Additional address (Optional)

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

City

e.g. Alabaster

State/Province

Select State/Province

Zip Code

e.g. 35007

Phone Number

(857) 777-7777 - Main Company Number

Edit

Fax Number

(857) 777-7777 - Main Company Number

Edit

Cover Page

None

Select

Faxes Sent via Email

To enable sending faxes via email from additional email addresses, enter them here. To send a fax via email, [send the fax via faxnumber@rcfax.com](#).

Omit cover page when email subject is blank

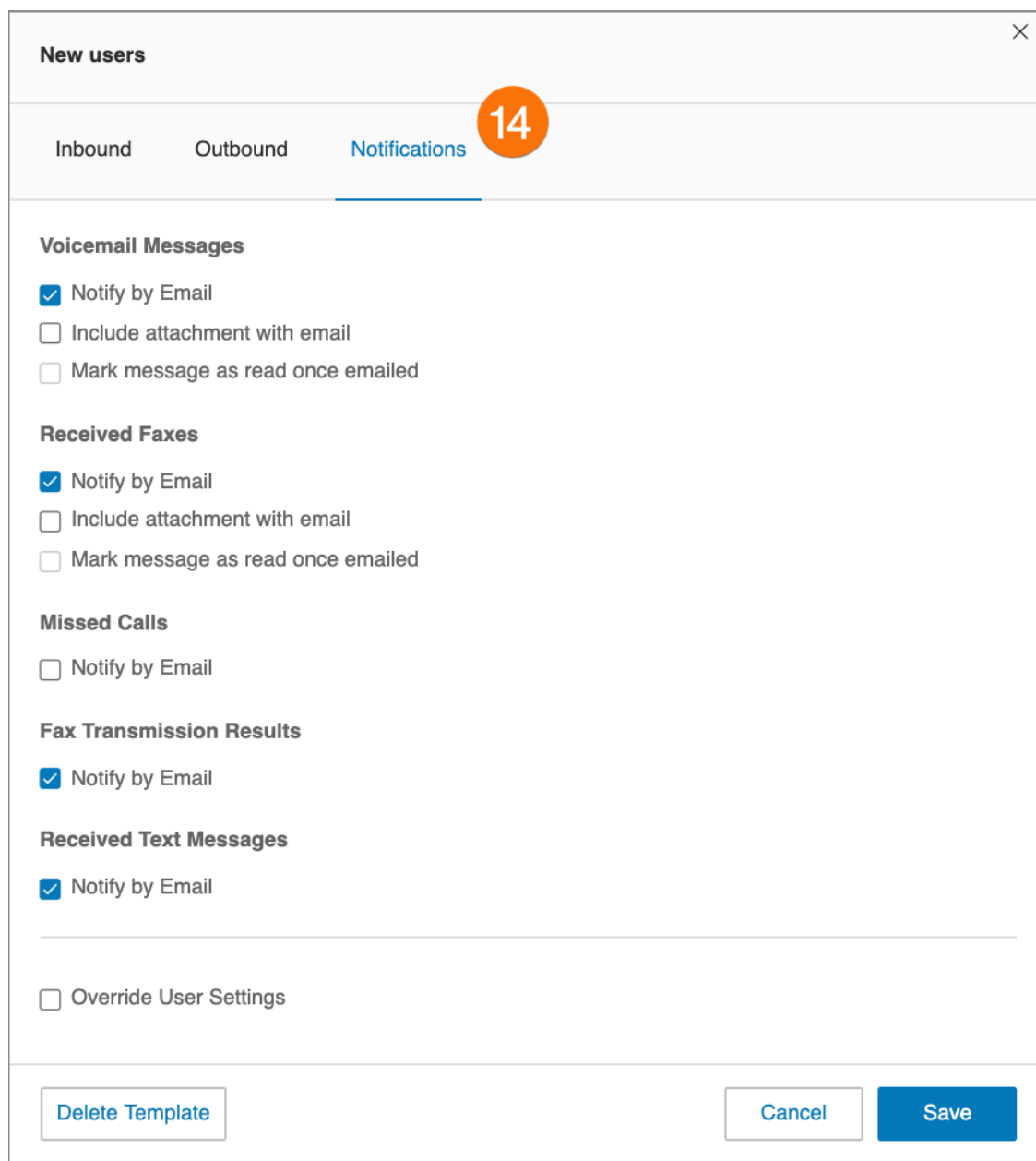
☐ On
☒ Off

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

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

15. Click **Save**.



**New users** ×

Inbound Outbound **Notifications** 14

**Voicemail Messages**

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

**Received Faxes**

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

**Missed Calls**

- ☐ Notify by Email

**Fax Transmission Results**

- ☒ Notify by Email

**Received Text Messages**

- ☒ Notify by Email

☐ Override User Settings

[Delete Template](#) [Cancel](#) [Save](#)

## Creating a template for Call Handling settings

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

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

- Step 1:** The 'Users' tab is selected in the Admin Portal navigation bar.
- Step 2:** The 'Templates' option is selected in the left sidebar.
- Step 3:** The 'Call Handling' option is selected under the 'Templates' section.
- Step 4:** The '+ Add Call Handling Template' button is clicked.
- Step 5:** The 'Add Call Handling Template' form is shown with the 'Name Template' step active. A new template name is entered.
- Step 6:** The 'Next' button is clicked to proceed to the next step.
- Step 7:** The 'Define Conditions' step is active. The 'Caller ID' condition is selected, and a phone number is entered.
- Step 8:** The 'Next' button is clicked to proceed to the final step.
- Step 9:** The 'Define Call Handling' step is active. The 'Take Messages' action is selected, and the 'Message Recipient' is set to 'This Extension'.
- Step 10:** The 'Save' button is clicked to complete the template creation.

## Applying a template to users

There are several ways to apply a template to users.

### Applying a template via Users List

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

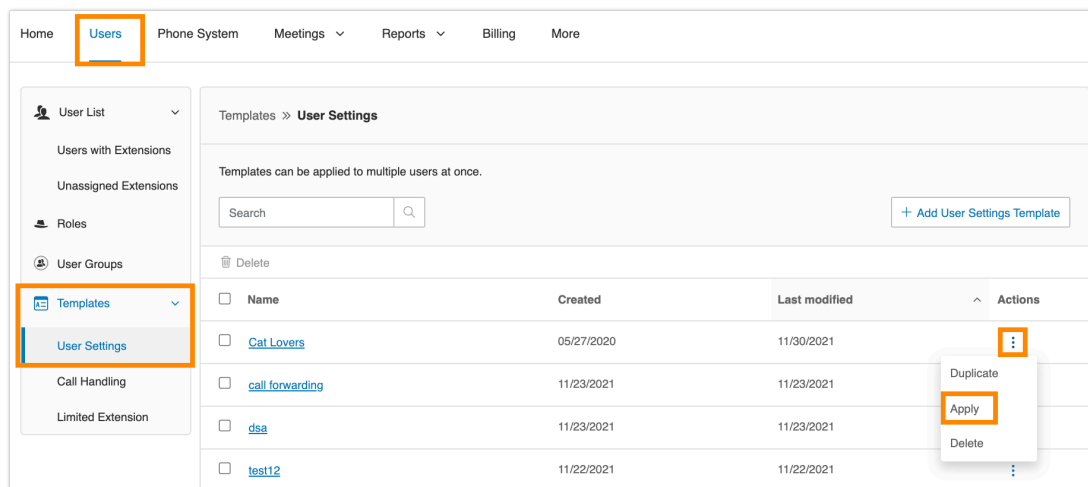
The screenshot illustrates the steps for applying a template to users in the RingCentral Admin Portal. The interface is divided into several sections:

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



## Applying a template via User Settings under Templates

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



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

## Applying a template via User Details

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

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

## Managing the Phone System

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

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

---

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

Admin Portal

Company Info

Phone Numbers >

Auto-Receptionist >

Groups >

Phones & Devices >

Emergency Calling >

Ext.	Name/Type	Address	Site Code	Actions
	<a href="#">Main Site</a>		11	
12005	<a href="#">Something New</a>	234 MAIN ST, STE A, CHARLESTOWN, MA, 02129, United States	12	

## Company Info

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

### Managing Sites with Multi-Site Support

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

The image displays two screenshots of the RingCentral Admin Portal interface, specifically the 'Company Info' page.

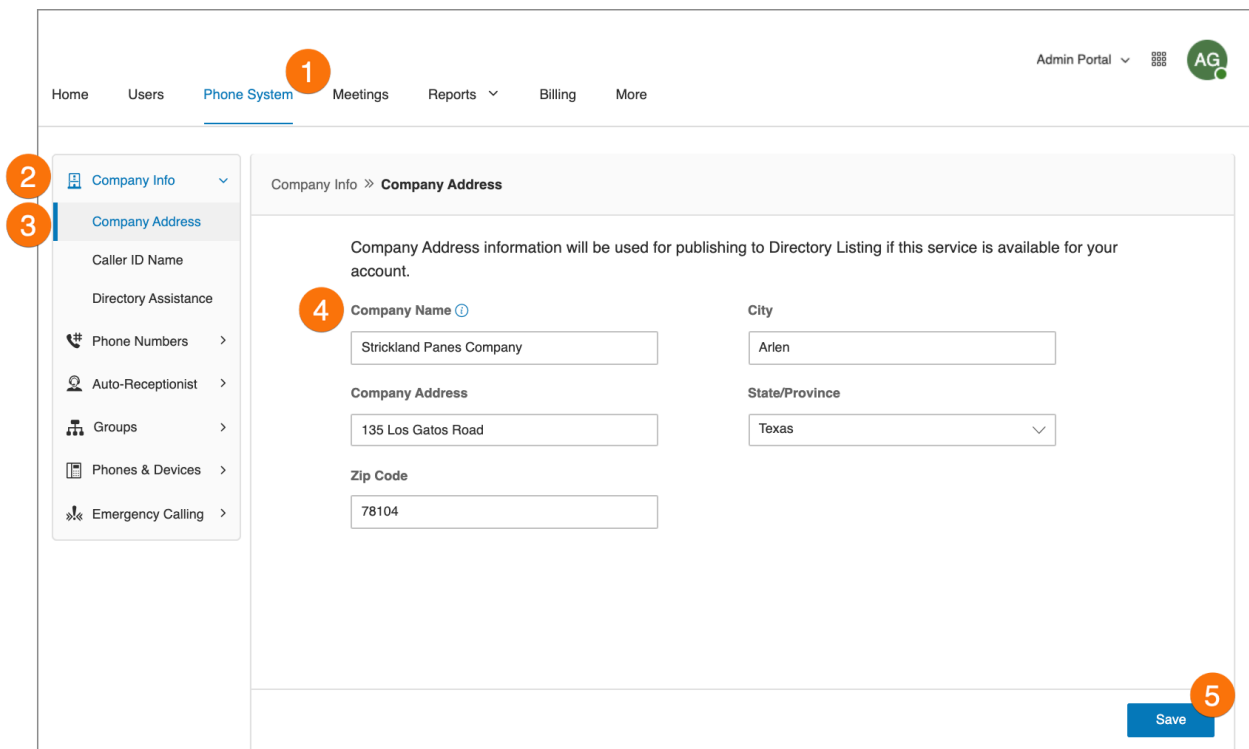
**Top Screenshot (Single-Site Account):** The 'Company Info' tab is selected in the left sidebar. The main content area shows the 'Company Address' tab. The form includes fields for 'Company Name' (Strickland Pane Company), 'City', 'Company Address', 'State/Province' (a dropdown menu), and 'Zip Code'. A 'Save' button is located at the bottom right.

**Bottom Screenshot (Multi-Site Account):** The 'Company Info' tab is selected in the left sidebar. The main content area shows a list of sites on the left and a form for editing a selected site on the right. The list of sites includes columns for 'Ext.' and 'Name/Type', with entries for 'Main Site' and 'site 2'. The form for 'site 2' includes fields for 'Company Name' (John Smith Company), 'City' (Belmont), 'Company Address' (20 Davis Drive), 'State/Province' (California), and 'Zip Code' (94002). A 'Save' button is located at the bottom right.

## Company address

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

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



The screenshot displays the RingCentral Admin Portal interface for setting company address information. The top navigation bar includes 'Home', 'Users', 'Phone System' (1), 'Meetings', 'Reports', 'Billing', and 'More'. The left sidebar shows 'Company Info' (2) expanded, with 'Company Address' (3) selected. The main content area is titled 'Company Info » Company Address'. It contains a note: 'Company Address information will be used for publishing to Directory Listing if this service is available for your account.' Below this are five input fields: 'Company Name' (4) with the value 'Strickland Panes Company', 'City' with 'Arlen', 'Company Address' with '135 Los Gatos Road', 'State/Province' with a dropdown showing 'Texas', and 'Zip Code' with '78104'. A blue 'Save' button (5) is located at the bottom right.

## Caller ID Name

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

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

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

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

## Directory Assistance

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

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

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

The following information will be submitted to Directory Assistance:

Main Number: (409) 240-1234

Company Name: Strickland Panes Company City: Belmont

Company Address: 20 Davis Dr State/Province: California

Zip Code: 94002 Email:

Status: Unpublished

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

List your business phone number and address in Directory Assistance:

Features:

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

[Directory listing overview >](#)

Next

The following information will be submitted to Directory Assistance:

Main Number: (409) 240-1234

Company Name: Strickland Panes Company City: Belmont

Company Address: 20 Davis Dr State/Province: California

Zip Code: 94002 Email:

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

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

☒ I agree to the terms of service.

List your business phone number and address in Directory Assistance:

Features:

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

[Directory listing overview >](#)

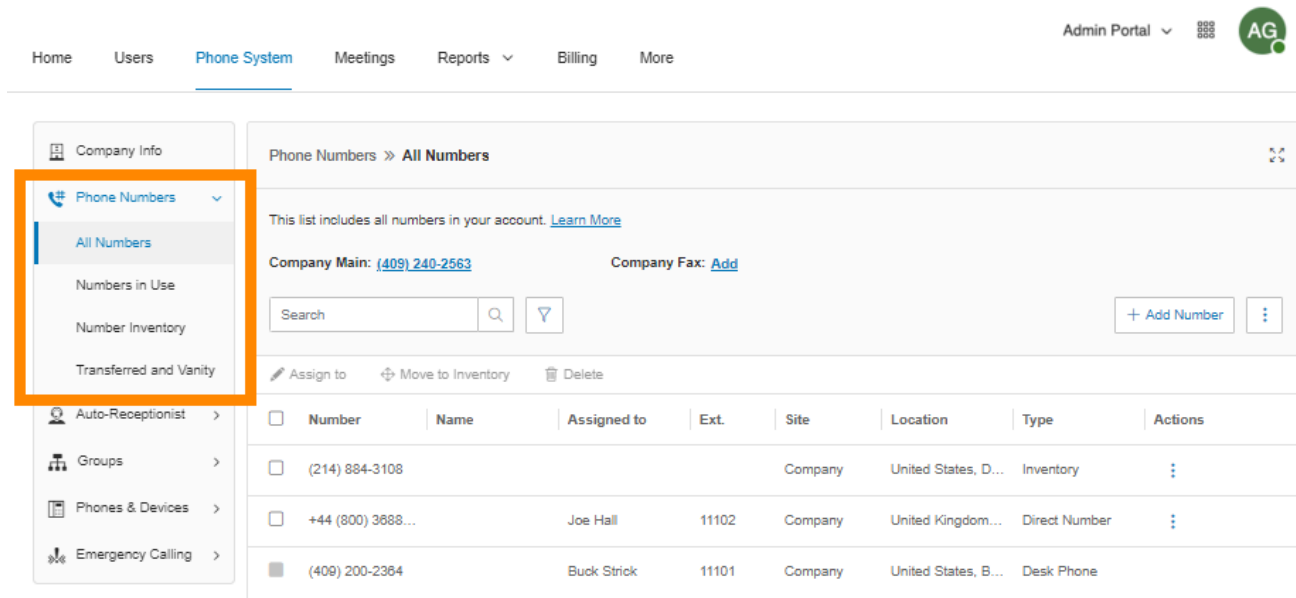
Back Publish

## Phone Numbers

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

The tabs contain these types of numbers:

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



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

Company Info

**Phone Numbers** ▾

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

Auto-Receptionist >

Groups >

Phones & Devices >

Emergency Calling >

Phone Numbers » **All Numbers**

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

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

Search

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



## Adding company numbers

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

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

The screenshot illustrates the process of adding a company number in the RingCentral Admin Portal. It shows the navigation path from the Admin Portal to the Phone System tab, then to Phone Numbers, and finally to All Numbers. The 'Add Number' modal is displayed in three stages, with numbered callouts indicating the steps: 1. Selecting a location and number type, 2. Assigning the number to an Auto-Receptionist, and 3. Reviewing the charges and taxes. The 'Add Number' modal includes a search bar, a list of available numbers, and a table of charges and taxes.

Period	Charges and credits	Unit Price	Quantity	Amount
02/08/2021 - 02/07/2022	Additional Local Number (new purchase)	\$59.99	1	\$59.99
02/08/2021 - 02/07/2022	Additional Local Number - Porting Adjustment	(\$1.00)	1	(\$1.00)
Charges after Discounts and Promotes:				\$58.99
Taxes				
State and local taxes and fees				\$1.56
FED. TAXES				\$6.70
Taxes after Discounts and Promotes:				\$10.26
Total charges after discounts and promotes:				\$69.25
Total Taxes and Fees:				\$10.26
Sub-total:				\$79.51
Total Charged to Credit Card:				\$79.51

## 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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## 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**.

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

Assign to Move to Inventory Delete

Number	Name	Assigned to	Ext.	Site	Location	Type

+ Add Number  
 Forward Number  
 Download All Numbers

**Forward My Calls to RingCentral**

1 Enter Existing Numbers 2 Assign to Ext. 3 Confirmation

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

Existing Phone Number  
 (800) 367-1234

Cancel Next

**Forward My Calls to RingCentral**

✓ Enter Existing Numbers 2 Assign to Ext. 3 Confirmation

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

Inbound Calls → (800) 367-1234 (If my line is BUSY or I DO NOT ANSWER) → RingCentral Auto-Receptionist

Forward calls from (800) 367-1234 to:

☒ Auto-Receptionist  
☐ Extension

Back Next

**Forward My Calls to RingCentral**

✓ Enter Existing Numbers ✓ Assign to Ext. 3 Confirmation

Your RingCentral phone system is now configured to accept calls from your (800) 367-1234 number.

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

Ordering Call Handling

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

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

Telephone Company Charges

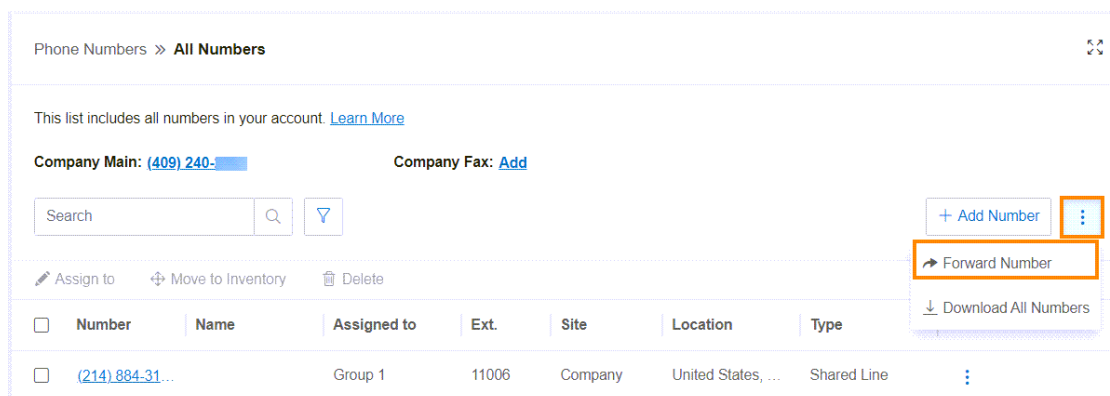
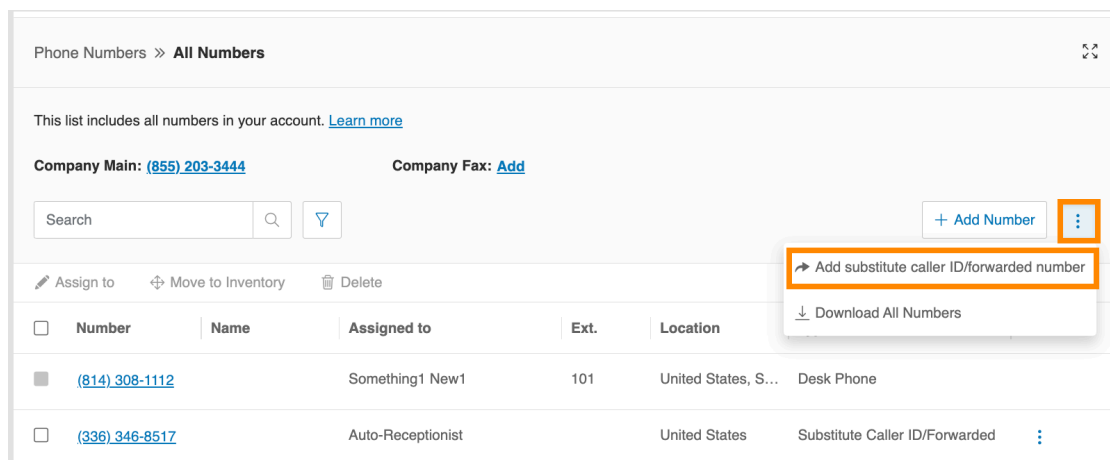
Your local phone company may charge you a small activation fee and an ongoing monthly fee for these call handling services. Please check with your phone company for details on these charges.

Print Done

## 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.

The screenshot shows a dialog box titled "Add substitute caller ID/forwarded number" with a close button (X) in the top right corner. Below the title is a progress bar with four steps: "1 Enter number", "2 Assign to extension", "3 Verify ownership", and "4 Set up forwarding". Step 1 is currently active and underlined. The main content area contains the text "Enter the number you want to add as a [substitute caller ID](#) and/or [forwarded number](#)." Below this is a label "Phone Number" and a text input field containing the number "6502950002". At the bottom right, there are two buttons: "Cancel" and "Next".

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

The screenshot shows the same dialog box, now at Step 2: "Assign to extension". The progress bar shows "1 Enter number" as completed with a checkmark, and "2 Assign to extension" as the current step. On the left, under "Assign (650) 295-0002 to", there are two radio button options: "Auto-Receptionist" (which is selected) and "Extension". On the right, under "Substitute caller ID", there is a text description: "Once set up, this can be used as an outbound caller ID for all extensions." Below this, under "Number forwarding", there is a flow diagram. It starts with a box labeled "Inbound Calls" with a phone icon and three dots. An arrow points to a box labeled "(650) 295-0002" with the text "If my line is BUSY or I DO NOT ANSWER". Another arrow points to a box labeled "RingCentral Auto-Receptionist" with the RingCentral logo. At the bottom right, there are "Back" and "Next" buttons.

- **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.

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.

Add substitute caller ID/forwarded number

✓ Enter number

✓ Assign to extension

3 Verify ownership

4 Set up forwarding

(650) 295-0002 was added. If you want to use the number as a substitute caller ID, follow the instructions below.

Contact Support at (888) 898-4591 and provide the following documents to verify ownership:

- [Download](#) and sign the Substitute Presentation Caller ID Agreement. Your RingCentral user ID is 400132640002 (this is needed to finish the form).
- A copy of the latest bill. Bill must show ownership of the numbers to be used as the caller ID.
- A CSV file containing the list of the relevant phone numbers in E.164 format. Format example: 16502950002 (country code in front of the number).

Print

Print or reference these again by going to numbers page, clicking the More icon, and clicking Setup instructions.

Next

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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Add substitute caller ID/forwarded number ×

✓ Enter number
✓ Assign to extension
✓ Verify ownership
4 Set up forwarding

If you want to forward calls automatically to your RingCentral account, follow the instructions below.

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

**Ordering call handling**

1. Contact your local telephone company's customer service department and request that the telephone features Busy Call Handling and No Answer Call Handling\* be installed on your telephone line.
2. Be sure to indicate that you would like Fixed Call Handling, and not variable or basic.
3. Your telephone company will ask you to which number you would like your calls forwarded. This number is (855) 203-3444.
4. The telephone company must enter this forwarding number exactly as listed, including the "1" before the 855 number, in order for RingCentral to work. Ask the customer service representative to repeat the number back to you to verify that it was entered into their system correctly.
5. When ordering No Answer Call Handling, you must choose how many rings you would like to hear before your calls are forwarded to RingCentral. You may choose as many as you like. But we recommend you set it to 4 rings.

\* If the customer service representative says these features are not available, ask to speak to a supervisor. These features are available almost everywhere in the US.

**Telephone company charges**

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

Print

Print or reference these again by going to numbers page, clicking the More icon, and clicking Setup instructions.

Back

Done

## 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.



## Naming phone numbers

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

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

The screenshot illustrates the process of naming a phone number in the RingCentral Admin Portal. The steps are numbered 1 through 6:

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

The interface shows the 'Numbers in Use' section with a table of phone numbers. The selected number is (409) 200-2364, assigned to Joe Hall. The modal form for this number shows the 'Name' field set to 'Buck desk phone' and the 'Number Type' set to 'Voice and Fax'. The 'Save' button is highlighted.

## Viewing unassigned numbers

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

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

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

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes 'Home', 'Users', 'Phone System' (selected), 'Meetings', 'Reports', 'Billing', and 'More'. The 'Admin Portal' dropdown is visible. The left sidebar contains 'Company Info', 'Phone Numbers' (selected), 'All Numbers', 'Numbers in Use', 'Number Inventory' (selected), 'Transferred and Vanity', 'Auto-Receptionist', 'Groups', 'Phones & Devices', and 'Emergency Calling'. The main content area is titled 'Phone Numbers > Number Inventory'. It includes a search bar, a filter dropdown set to 'Locations', and a 'Sites' dropdown. A table lists unassigned numbers with columns: Number, Name, Site, Location, and Actions. The table contains three entries: (214) 884-3108, (650) 422-3759, and +44 (1224) 012... Each entry has a checkbox and a vertical ellipsis for actions.

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

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

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

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

## Viewing transferred and vanity numbers

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

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with a red circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. On the right, there is an 'Admin Portal' dropdown and a user profile icon labeled 'AG'. The left sidebar contains a menu with 'Company Info', 'Phone Numbers' (highlighted with a red circle 2), 'All Numbers', 'Numbers in Use', 'Number Inventory', 'Transferred and Vanity' (highlighted with a red circle 3), 'Auto-Receptionist', 'Groups', 'Phones & Devices', and 'Emergency Calling'. The main content area is titled 'Phone Numbers » Transferred and Vanity'. It includes a descriptive paragraph about transferred numbers and a link 'Learn how to transfer your number'. Below this is a section for 'Transfer Orders' with a search bar and a red circle 4 next to the '# Transfer Numbers' button. A table with columns 'Status', 'Order Number', 'Date Created', and 'Date Completed' is shown, but it contains 'No results'. At the bottom, there are expandable sections for 'International Number Orders' and 'Pending Vanity Numbers', and a pagination bar showing 'Total: 0' and 'Show: 25'.

## 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.

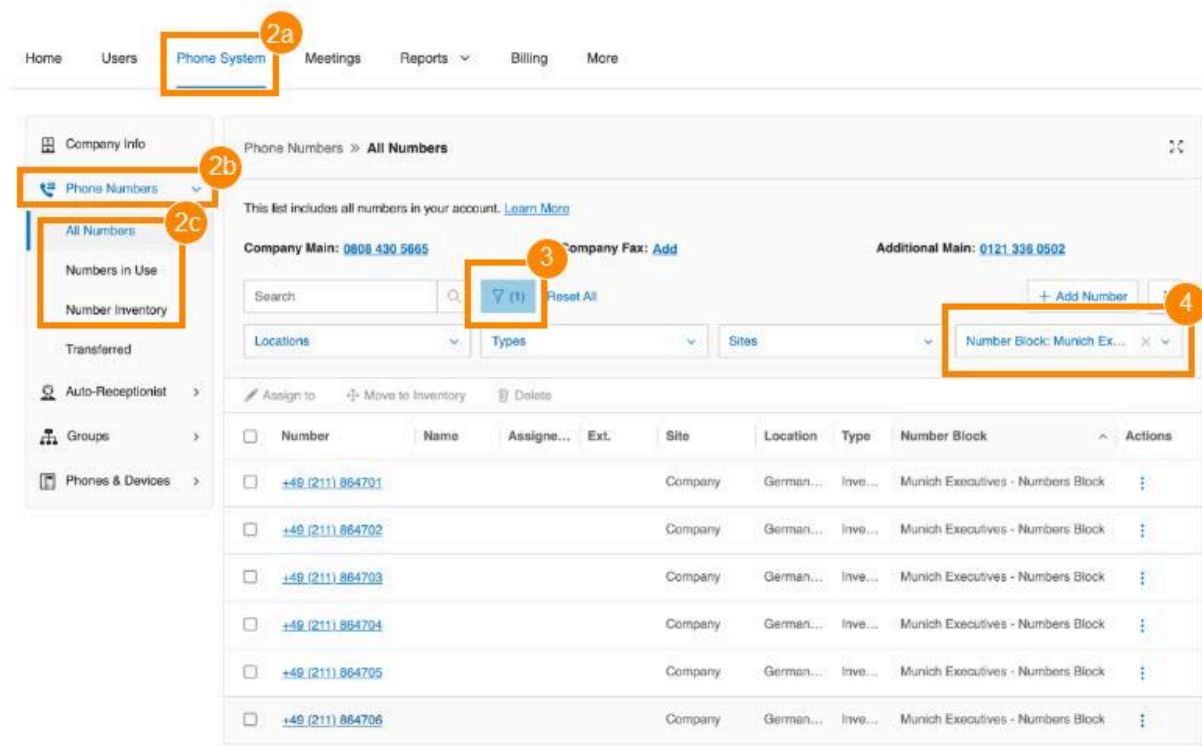
Companies acquire additional numbers, more than the current need, to account for their growing business. This results in a need to store the extra numbers not currently in use, especially when they port numbers from other phone providers over to RingCentral. These numbers can be in contiguous sequences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



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.



The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System (highlighted with callout 2a), Meetings, Reports, Billing, and More. The left sidebar contains a menu with options like Company Info, Phone Numbers (highlighted with callout 2b), All Numbers, Numbers in Use, Number Inventory, Transferred (highlighted with callout 2c), Auto-Receptionist, Groups, and Phones & Devices. The main content area is titled 'Phone Numbers > Transferred' and contains a sub-tab 'Number Blocks' (highlighted with callout 3). Below the tabs, there is a search bar and a table listing number blocks. The table has columns for Block ID, Block Name, Country, Total, In Use, Available, and Actions. A 'Delete' button is visible next to the 'NB001' row.

Block ID	Block Name	Country	Total	In Use	Available	Actions
123456	London	United Kingdom	5	0	5	⋮
130555	Test Henri	United Kingdom	0	0	0	⋮
1352451	Stephen Test2	United Kingdom	10	0	10	⋮
87392977262	DeleteMe	Germany	0	0	0	⋮
999999	Munich Executives - Number...	Germany	121	1	120	⋮
NB001	Number Block 1	United Kingdom	0	0	0	⋮
NB002	Number Block 2	United Kingdom	11	10	1	⋮
NB003	bandwidth did 115	United Kingdom	1	1	0	⋮

## 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.

## Auto-Receptionist

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

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

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

The screenshots show the 'Auto-Receptionist > General Settings' page in the RingCentral Admin Portal. The left sidebar contains navigation links: Company Info, Phone Numbers, Auto-Receptionist (highlighted), General Settings, IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling. The top navigation bar includes Home, Users, Phone System, Meetings, Reports, Billing, and More. The right side of the page shows the 'Admin Portal' and the 'AG' logo.

**Top Screenshot (Single Level):**

- Page Title: Auto-Receptionist > General Settings
- Instruction: Create your own Auto-Receptionist for your Phone System. Customize your options for effective call management. [Learn More](#)
- Buttons: Single Level
- Settings:
  - 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:** Time Zone: (GMT-08:00) Pacific Time (US & Canada)

**Bottom Screenshot (Multi-level):**

- Page Title: Auto-Receptionist > General Settings
- Instruction: Create your own Auto-Receptionist for your Phone System. Customize your options for effective call management. [Learn More](#)
- Buttons: Multi-level
- Search: Search sites...
- Table:

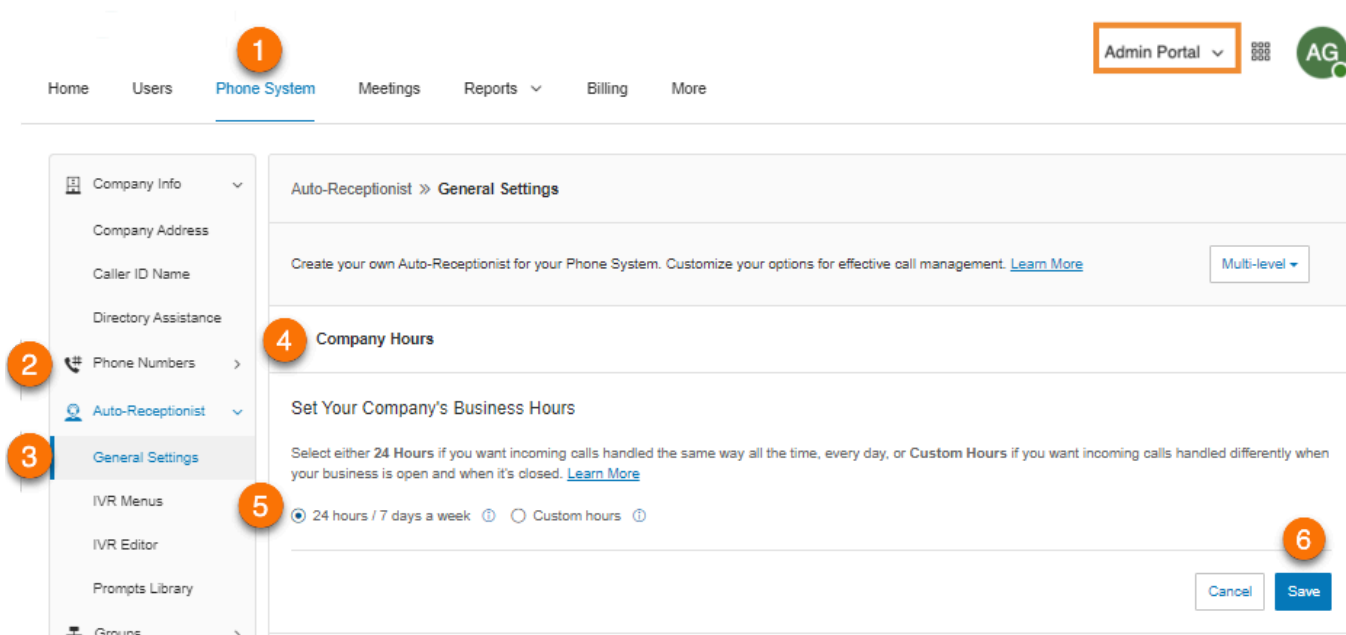
Ext.	Name/Type
	<a href="#">Main Site</a>
40000	<a href="#">site 2</a>
- Settings:
  - Company Hours:** Custom
  - IVR Settings:** Company Fax/SMS Recipient: John Smith, Ext. 11103
  - Dial-by-Name Directory:** On
  - Call Recording:** On-demand: On, Automatic: Off
  - Block robocalls on toll-free numbers:** Off
  - Regional Settings:** Time Zone: (GMT-08:00) Pacific Time (US & Canada)

## Company business hours

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

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

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



## Company call handling

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

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

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

[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.

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

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

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

7. Click **Done**.

8. Click **Save**.

Company Hours Greeting

Set Greeting

5

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. 11005

Caller dial 9

Route to

Company Directory

Caller dial extension

Route to Extension

No action

Connect to Operator

John Smith, Ext. 11003

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. 11003

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

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## Regional Settings

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

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

To configure regional settings:

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



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

Admin Portal AG

Company Info >

Phone Numbers >

Auto-Receptionist >

**General Settings**

IVR Menus

IVR Editor

Prompts Library

Groups >

Phones & Devices >

Emergency Calling >

Auto-Receptionist » **General Settings**

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

**Company Hours**

24 hours

**IVR Settings**

Operator Ext.: Hank Hill, Ext. 101

**Dial-by-Name Directory**

On

**Call Recording**

On-demand: On

Automatic: Off

**Block robocalls on toll-free numbers**

Off

**Regional Settings**

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

**Time Zone**

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

**Time Format**

☒ 12 h (AM/PM) ☐ 24 h

**Home Country Code**

United States (1)

**User Language**

English (U.S.)

**Greetings Language**

English (U.S.)

**Regional Format**

United States

Cancel Save

## Dial-by-name directory

The Dial-by-Name section allows you to enable callers to search your phone system by users' first or last names using their 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**.

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

On the left sidebar, the 'Auto-Receptionist' menu is expanded (highlighted with a red circle 2), and 'General Settings' is selected (highlighted with a red circle 3). Below it, other options like 'IVR Menus', 'IVR Editor', 'Prompts Library', 'Groups', 'Phones & Devices', and 'Emergency Calling' are visible.

The main content area is titled 'Auto-Receptionist > General Settings'. It contains several sections:
 

- 'Company Hours' set to '24 hours'.
- 'IVR Settings' with 'Operator Ext.: Hank Hill, Ext. 101'.
- 'Dial-by-Name Directory' (highlighted with a red circle 4), which includes a toggle switch 'Enable Dial-by-Name Directory' (highlighted with a red circle 5) that is currently turned on.
- 'Extensions in Directory' section with a description: 'By default, all extensions are included in the dial-by-name directory. You can exclude certain extensions that you do not want to be searchable.' It features a table with columns 'Searchable Extensions' and 'Directory Extension'. The first row shows '1' in the first column and '9' in the second column. An 'Edit' button is located below the table.
- 'Search Criteria' section with a 'Search by' dropdown set to 'Last name' (radio button selected).

At the bottom right, there are 'Cancel' and 'Save' buttons (highlighted with a red circle 6).

## Operator extension

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

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

To reset the Operator Extension:

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

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

The screenshot illustrates the process of setting the Operator Extension in the RingCentral Admin Portal. The interface is divided into a sidebar and a main content area. The sidebar contains navigation links: Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The main content area shows the 'Auto-Receptionist > General Settings' page. On the left, there's a sidebar with links: Company Info, Phone Numbers, Auto-Receptionist (highlighted with a red circle 2), General Settings (highlighted with a red circle 3), IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling. The main content area has sections for 'Company Hours' (24 hours), 'IVR Settings' (highlighted with a red circle 4), 'Company Greeting', 'Company Hours Greeting', 'After Hours Greeting', 'Custom Answering Rules', and 'General IVR Settings'. The 'General IVR Settings' section shows 'Operator Extension (0)' with a 'Select Extension' button (highlighted with a red circle 5). A modal window titled 'Operator Extension (0)' is open, showing a table with columns: Select, Name, Ext., Type, and Department. The table lists 'Hank Hill' with extension '101' and type 'User' (highlighted with a red circle 6). The modal also includes a search bar, a department dropdown, and buttons for 'Cancel' and 'Done' (highlighted with a red circle 7). The background settings page has buttons for 'Edit', 'Custom Rule', 'Select Extension', and 'Save' (highlighted with a red circle 8).

## Zero dialing

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

To set zero dialing:

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

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

The screenshot displays the RingCentral Admin Portal interface for configuring the Auto-Receptionist. The navigation menu on the left includes options like Company Info, Phone Numbers, Auto-Receptionist, General Settings, IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling. The main content area is titled 'Auto-Receptionist > General Settings'. It contains sections for 'Company Hours' (set to 24 hours), 'Company Greeting' (with a play button and duration 00:00 / 00:00), 'After Hours Greeting', 'Custom Answering Rules', and 'General IVR Settings'. The 'Zero Dialing' section is highlighted with a red circle and contains three radio button options: 'Connect to Company Greeting', 'Do nothing', and 'Connect to Extension'. The 'Connect to Extension' option is selected, and a sub-section shows 'Operator Extension (0)' with a 'Select Extension' button. The 'Save' button is highlighted with a red circle at the bottom right.

## Name or label definitions

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

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

**Note:** This option is available for RingCentral Ultimate users.

The screenshot illustrates the process of renaming a phone number in the RingCentral Admin Portal. It is divided into two parts: a navigation overview and a detailed editing view.

**Navigation Overview (Top):**

- Step 1:** The **Phone System** tab is selected in the top navigation bar.
- Step 2:** The **Phone Numbers** option is selected in the left sidebar.
- Step 3:** The **Company** sub-option is selected under Phone Numbers.
- Table:** A table lists phone numbers. The number **(720) 555-5555** is highlighted, corresponding to **Step 4**.

**Detailed Editing View (Bottom):**

This view shows the configuration for the selected number **(720) 555-5555**.

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

## On-demand call recording

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

The screenshot displays the RingCentral Admin Portal interface for configuring the Auto-Receptionist. The top navigation bar includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The sidebar on the left contains a list of settings categories: Company Info, Phone Numbers, Auto-Receptionist (highlighted with a red circle 2), General Settings (highlighted with a red circle 3), IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling. The main content area is titled "Auto-Receptionist > General Settings". It contains a description of the Auto-Receptionist feature and a "Single Level" dropdown. Below this are sections for "Company Hours" (set to 24 hours), "IVR Settings" (Operator Ext.: Hank Hill, Ext. 101), and "Dial-by-Name Directory" (set to On). The "Call Recording" section is highlighted with a red circle 4 and includes a toggle for "On-demand Call Recording" (enabled) and a link to "Learn More". It also features "Announcement on Start" and "Announcement on Stop" sections, each with a play button, a duration slider (00:00 / 00:00), and an "Edit" button (highlighted with a red circle 5). Two modal windows are open for editing these announcements. The "Announcement on Start" modal (highlighted with a red circle 6) shows a "Set Greeting" dropdown (Default), a "View In" dropdown (English (U.S.)), and a text field containing "This call is being recorded. If you do not wish to be recorded, please disconnect at this time." The "Announcement on Stop" modal (highlighted with a red circle 6) shows a "Set Greeting" dropdown (Default), a "View In" dropdown (English (U.S.)), and a text field containing "This call has been recorded." Both modals have "Cancel" and "Done" buttons. At the bottom right of the main content area, there are "Cancel" and "Save" buttons (highlighted with a red circle 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**.

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



## Interactive Voice Response (IVR)

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

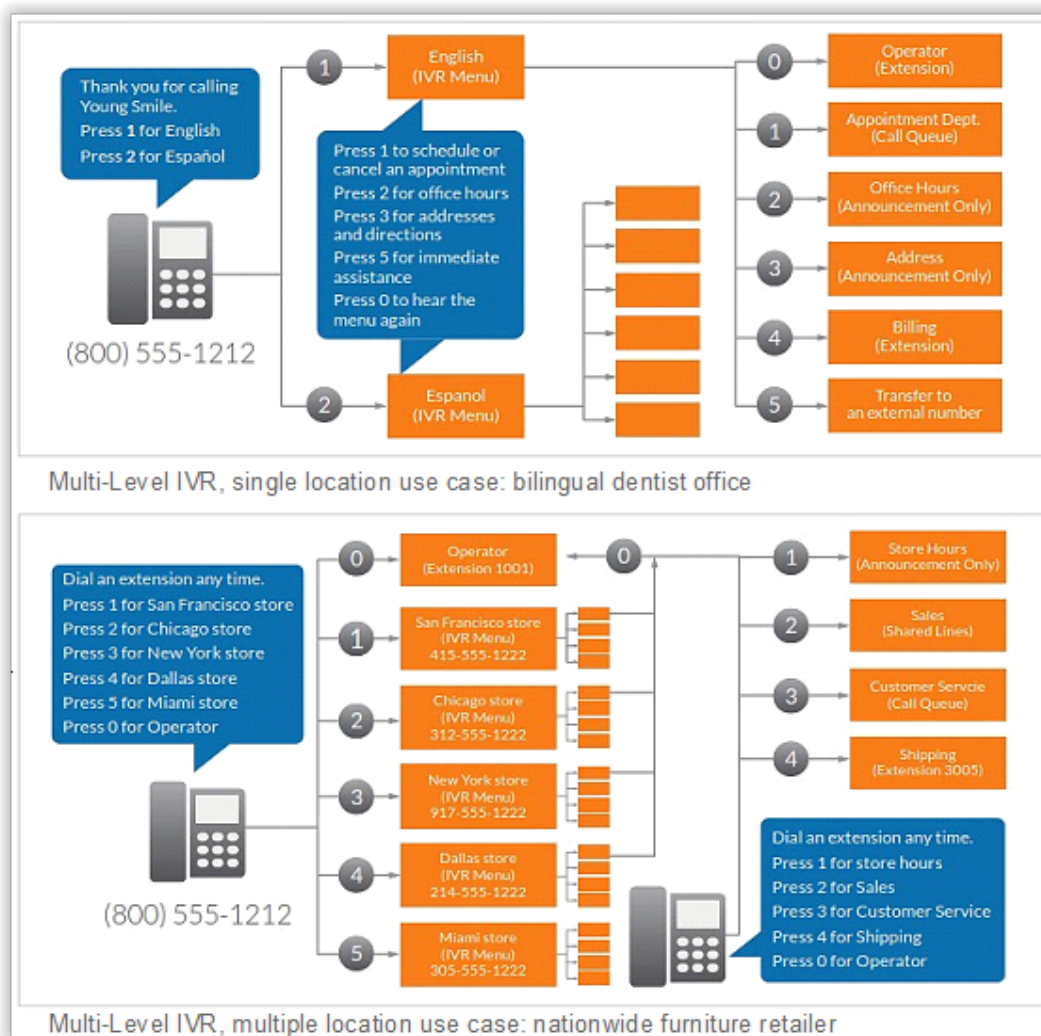
### Multi-level IVR options

#### Single-location IVR example

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

#### Multiple-location IVR example

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



## Switching to multi-level IVR mode

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

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

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

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

- Top Navigation Bar:** Includes links for Home, Users, **Phone System** (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The Admin Portal logo is in the top right.
- Left Sidebar:** Contains a list of settings categories: Company Info, Phone Numbers, **Auto-Receptionist** (highlighted with a red circle 2), **General Settings** (highlighted with a red circle 3), IVR Menus, IVR Editor, Prompts Library, Groups, Phones & Devices, and Emergency Calling.
- Main Content Area:** Displays the 'Auto-Receptionist » General Settings' page. It includes a 'Single Level' button (highlighted with a red circle 4) and a 'Multi-level' button. A modal window titled 'Switch to Multi-level IVR' is open, showing a warning message: 'Warning: By switching to Multi-level IVR mode, all of your existing company call handling settings will be discarded. Please confirm that you wish to proceed.' The 'Continue' button is highlighted with a red circle 5.
- Switch to Multi-level IVR Modal:** This modal window is titled 'Switch to Multi-level IVR' and contains a search field labeled 'Select the top level menu to connect to:'. Below the search field is a table with columns 'Select', 'Name', and 'Ext.'. The table lists one item: 'IVR Menu 1001' with extension '1001'. The 'Select' column has a radio button next to the item. At the bottom of the modal, there is a 'Total: 1' summary, a 'Show: 25' dropdown, and a 'Save' button (highlighted with a red circle 7).

## Managing general IVR settings

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

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

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

Admin Portal AG

Company Info >

Phone Numbers >

Auto-Receptionist >

**General Settings**

IVR Menus

IVR Editor

Prompts Library

Groups >

Phones & Devices >

Emergency Calling >

Auto-Receptionist > **General Settings**

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

**Company Hours**

24 hours

**IVR Settings**

**Top Level IVR Menu**

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

**Company Hours Top Menu**

IVR Menu 1001, Ext. 1001

No prompt defined for the selected IVR Menu.

[Select IVR Menu](#)

**After Hours Top Menu**

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

**Custom Answering Rules**

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

[Custom Rule](#)

**General IVR Settings**

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

**Press #**

Repeat menu greeting

**Press \***

Return to previous menu

**If caller enters no action after the prompt played 3 times**

☒ Disconnect the call ☐ Connect to extension

**Zero Dialing**

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

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

**Company Fax/SMS Recipient**

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

Hank Hill, Ext. 101

[Select Extension](#)

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

## IVR Editor

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

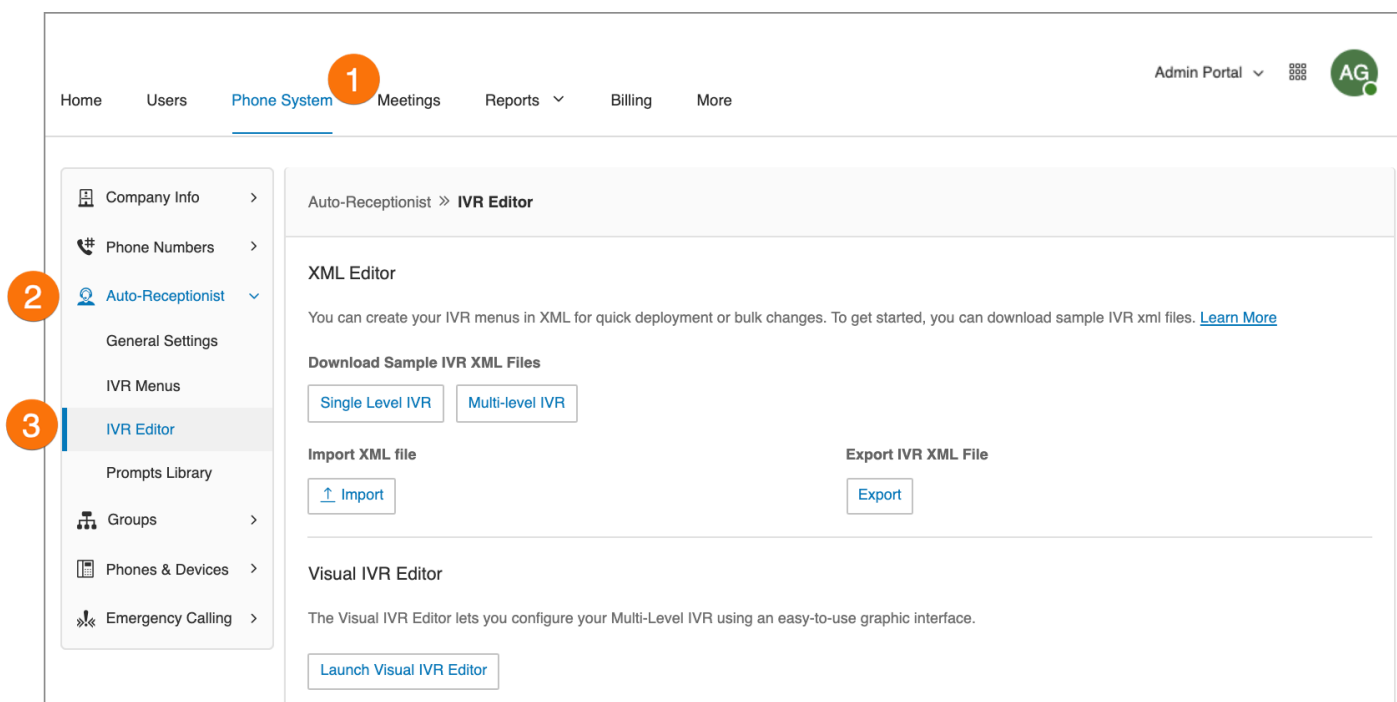
Auto-Receptionist consists of three parts that help you configure your IVR: IVR Menus, IVR Editor, Prompts Library. Use the IVR tool to:

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

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

Access the IVR Tool by using the following steps:

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



## IVR menus

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

### Adding an IVR menu group

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

The new IVR Menu appears listed under IVR Menus.

**Note:** Available for RingEX Premium and Ultimate users only.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes 'Home', 'Users', 'Phone System' (highlighted with an orange circle 1), 'Meetings', 'Reports', 'Billing', and 'More'. On the right, there is an 'Admin Portal' dropdown and a user profile icon labeled 'AG'. The left sidebar contains a menu with 'Company Info', 'Phone Numbers', 'Auto-Receptionist' (highlighted with an orange circle 2), 'General Settings', 'IVR Menus' (highlighted with an orange circle 3), 'IVR Editor', 'Prompts Library', 'Groups', 'Phones & Devices', and 'Emergency Calling'. The main content area is titled 'Auto-Receptionist >> IVR Menus'. It features a search bar, a 'Language' dropdown, a 'Validate Menus' button, and a '+ New IVR Menu' button (highlighted with an orange circle 4). Below this is a table with columns: 'Name', 'Numbers', 'Ext.', 'Language', and 'Actions'. The table contains one entry: 'IVR Menu 1001' with extension '1001' and language 'English (U.S.)'. An 'Add IVR Menu' modal window is open in the foreground, showing fields for 'Extension Number' (with value '1002', highlighted with an orange circle 5) and 'Extension Name' (with value 'IVR Menu 1002'). At the bottom of the modal are 'Cancel' and 'Save' buttons (the 'Save' button is highlighted with an orange circle 6).

## Configuring an IVR menu

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

### Configuring extension info

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

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

The screenshot illustrates the process of configuring an IVR menu in the RingCentral Admin Portal. It is divided into two main sections: a list of existing IVR menus and a detailed configuration form for a selected menu.

**Top Section: IVR Menus List**

- Navigation:** The top bar shows 'Phone System' (1) and 'Auto-Receptionist' (2) in the sidebar. 'IVR Menus' (3) is selected in the sidebar.
- Search and Actions:** A search bar and a 'Language' dropdown are present, along with 'Validate Menus' and 'New IVR Menu' buttons.
- Table:** A table lists existing IVR menus.
 

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

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

- Navigation:** The bottom bar shows 'Phone System' and 'Auto-Receptionist' in the sidebar. 'IVR Menus' is selected.
- Form Fields:**
  - Extension Number:** 1002 (5)
  - Menu Name:** IVR Menu 1002
  - Language:** English (U.S.)
  - Direct Number:** Add
- Buttons:** 'Delete IVR Menu' and 'Save' (6) are at the bottom right.

## 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**.



**1** Top navigation bar: Home, Users, Phone System, Meetings, Reports, Billing, More. Admin Portal, AG.

**2** Left sidebar: Company Info, Phone Numbers, Auto-Receptionist (selected), General Settings, IVR Menus (selected), IVR Editor, Prompts Library, Groups, Phones & Devices, Emergency Calling.

**3** IVR Menus section: Search, Language, Validate Menu, New IVR Menu. Below: Before you can switch your company call handling to Multi-Level IVR, you must first add and set up your IVR Menu. [Learn More](#).

**4** IVR Menu 1001 (Ext. 1001) details: Extension Info, Prompt, Key Presses (selected).

**5** Key Presses section: No key is configured. Add Key. Generic Key Presses: Use default settings (selected), Specify, View Defaults.

**6** Key Press Assignment dialog: Key Press 1, Action Transfer to voicemail of.

**7** Search field: Search, Extensions: All exten... (selected).

**8** Table header: Select, Name, Ext., Type, Department.

**9** Table row: Hank Hill, 101, User.

**10** Total: 1, Show 10, < 1 >, Cancel, Save.

## Adding a direct number

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

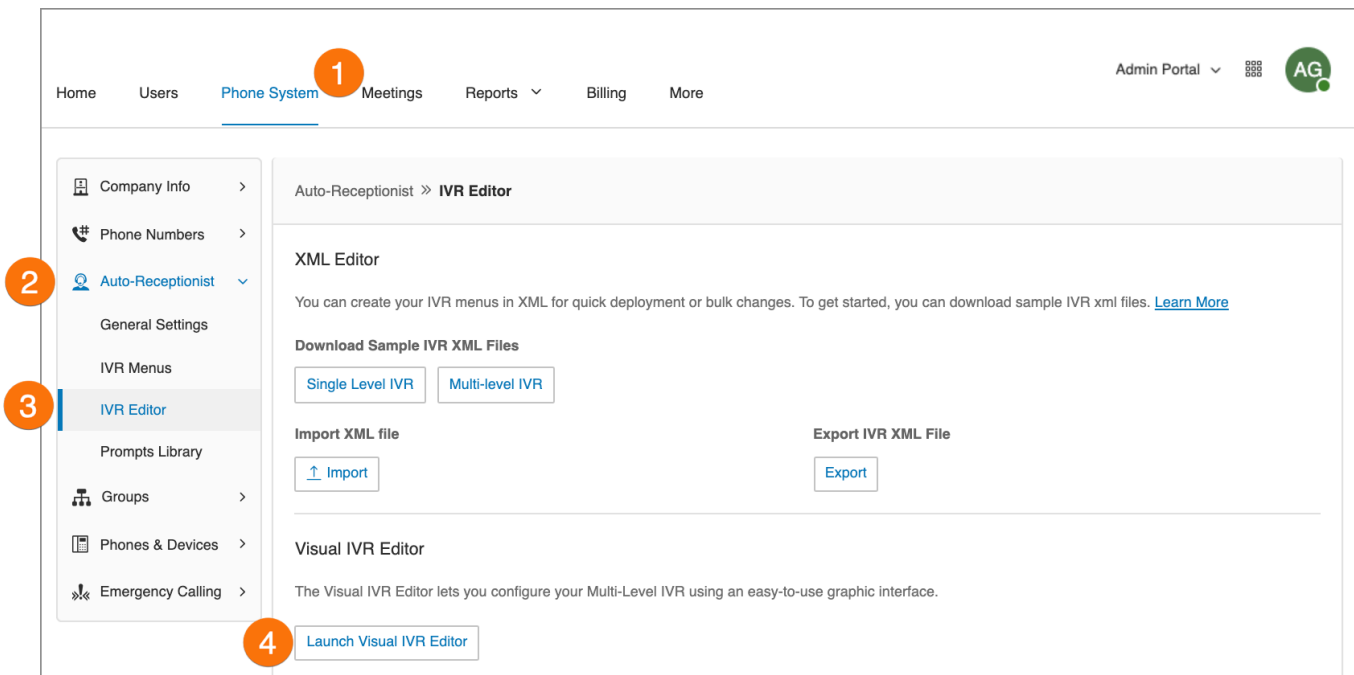
The screenshot illustrates the process of adding a direct number to an IVR menu in the RingCentral Admin Portal. It is divided into three main sections corresponding to the steps in the instructions:

- Step 1-4: Admin Portal Navigation**
  - The top navigation bar shows 'Phone System' (1) and 'Auto-Receptionist' (2).
  - The left sidebar shows 'IVR Menus' (3).
  - The main content area shows 'IVR Menu 1002' (4).
- Step 5: IVR Menu Configuration**
  - The 'Extension Info' tab is selected.
  - The 'Direct Number' section has an 'Add' button (5).
- Step 6-8: Add Direct Number Modal**
  - The modal shows the progress: 1 Select Numbers, 2 Confirm Order, 3 Order Confirmation.
  - Under '6 Select Numbers', the 'Location' is set to 'Domestic - US/Canada' and 'Number Type' is 'Local Number'.
  - The 'State' and 'Area Code' fields are visible.
  - An 'Add Numbers' button (7) is at the bottom left.
  - 'Cancel' and 'Next' buttons (8) are at the bottom right.

## Visual IVR Editor

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

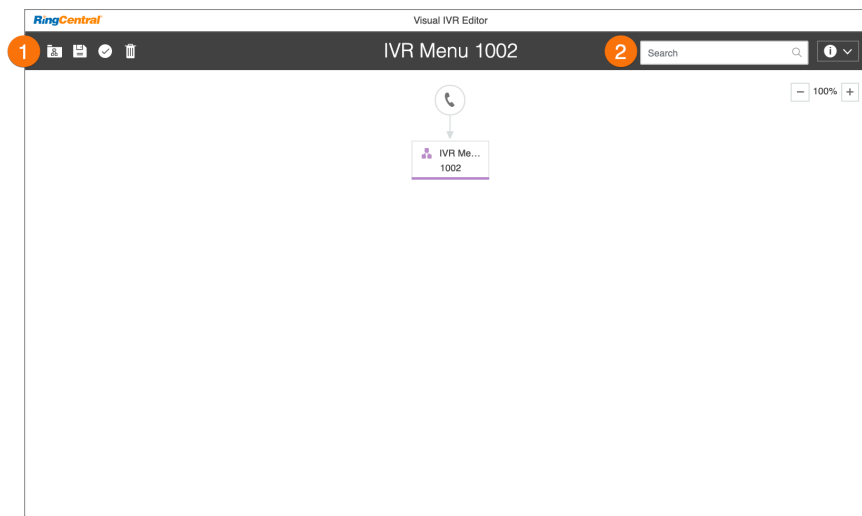
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**.
4. Click **Launch Visual IVR Editor**. The Visual IVR Editor opens in a new browser tab.



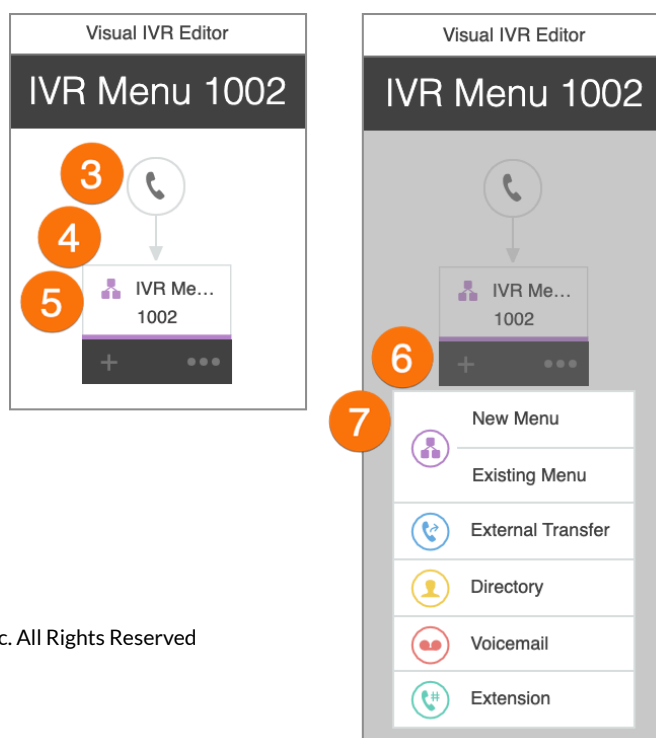
### Creating a new IVR menu or open an existing IVR menu

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

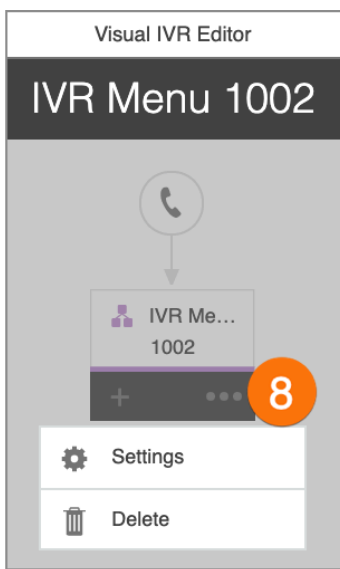
1. In the new tab, you will see your **Visual IVR Editor**. On this page, you will have a **New Tree** waiting to be created. You have the option to create a new IVR from this screen, or open an existing IVR and edit it in the Visual IVR Editor.
  - a. In the upper-left corner of the screen you have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



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



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



Visual IVR Editor

## IVR Menu 1002

IVR Me... 1002

Settings

Delete

8

### Menu Settings

Extension Info   Prompt   Key Presses

**Extension Number**

1002

**Menu Name**

IVR Menu 1002

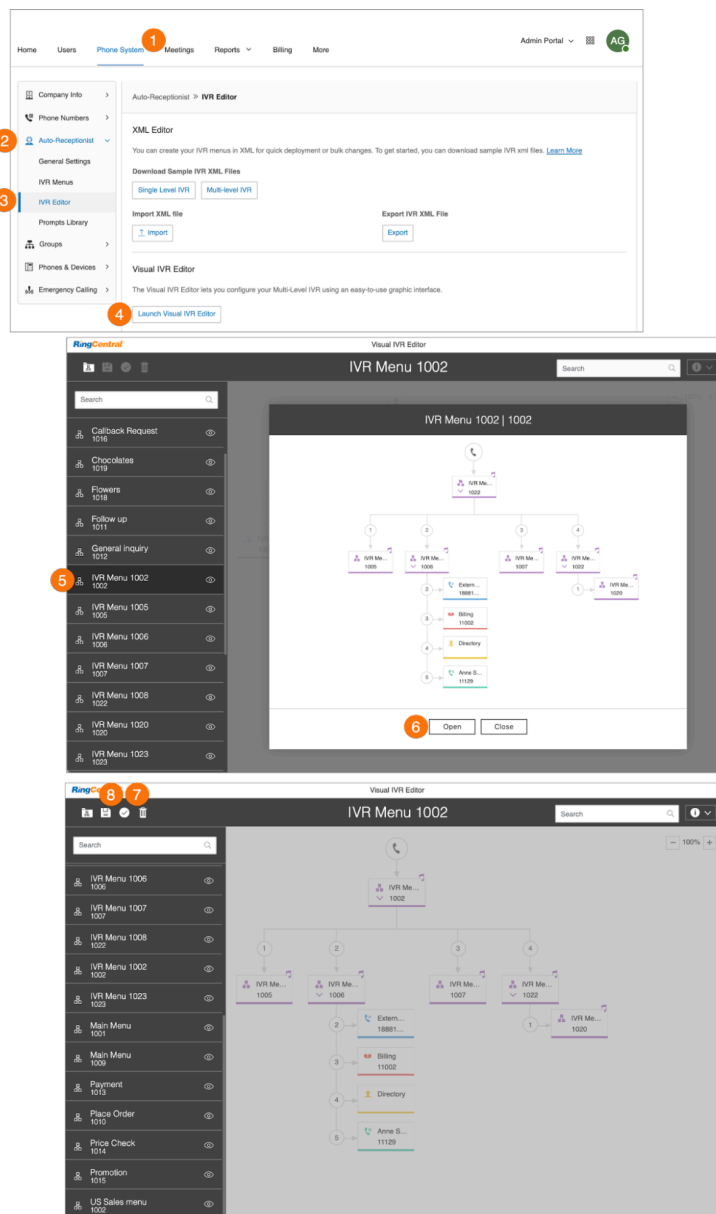
**Language** ⓘ

English (U.S.)

Cancel   Done

## Editing an existing IVR menu with the visual IVR editor

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



## Prompt recordings

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

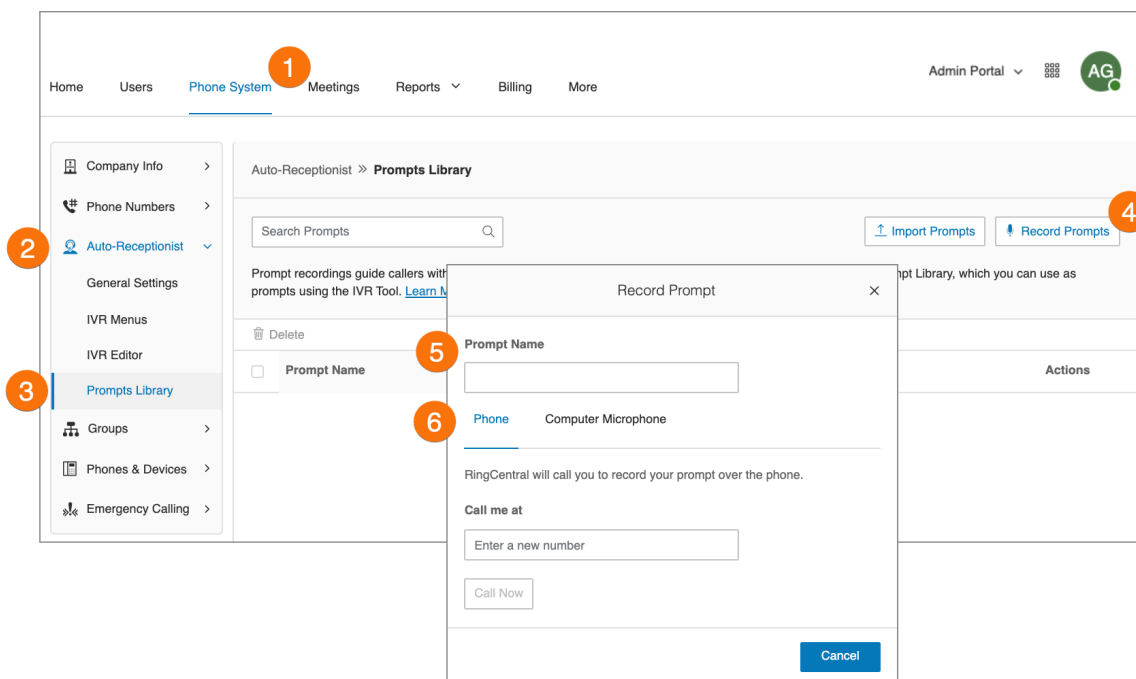
There are two prompt modes: audio and text-to-speech.

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

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

### Recording an audio prompt

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



## Selecting audio prompt mode

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

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

The image consists of two screenshots from the RingCentral Admin Portal, illustrating the process of selecting an audio prompt for an IVR menu. The top screenshot shows the 'Auto-Receptionist > IVR Menus' page. The left sidebar contains a navigation menu with items like 'Company Info', 'Phone Numbers', 'Auto-Receptionist', 'IVR Menus', 'IVR Editor', 'Prompts Library', 'Groups', 'Phones & Devices', and 'Emergency Calling'. The main content area shows a table of IVR menus. The bottom screenshot shows the 'IVR Menu 1002 (Ext. 1002)' page. On the left, there's a sidebar with 'Extension Info', 'Prompt', and 'Key Presses'. The main area has a 'Prompt Mode' section with 'Audio' and 'Text to speech' options, and a 'Select Prompt' button. A modal window titled 'Select Prompt' is open, showing a list of prompts. The 'Audio prompt' is selected. The modal has a 'Select' button at the bottom right. The main page has a 'Save' button at the bottom right.

**Top Screenshot: Auto-Receptionist > IVR Menus**

- 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.

**Bottom Screenshot: IVR Menu 1002 (Ext. 1002)**

- 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**.



## Selecting text-to-speech prompt mode

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

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

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

The first screenshot shows the Admin Portal navigation menu on the left. The 'Phone System' tab is selected (1). Under 'Auto-Receptionist', the 'IVR Menus' option is selected (3). The 'IVR Menus' page displays a table of existing IVR menus. The 'IVR Menu 1002' is selected (4). The second screenshot shows the 'IVR Menu 1002 (Ext. 1002)' configuration page. The 'Extension Info' tab is selected (5). Under 'Prompt Mode', the 'Text to speech' radio button is selected (6). The 'Text' input field contains the greeting 'Hi! How can I help you?' (7). The 'Save' button is visible at the bottom right (8).

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

**Step 2:** Click **Auto-Receptionist**.

**Step 3:** Click **IVR Menus**.

**Step 4:** Select an existing **IVR Menu**. The **Extension Info** will appear.

**Step 5:** Click **Prompt**.

**Step 6:** Under **Prompt mode**, select the button next to **Text to speech**.

**Step 7:** In the box for **Text**, type your desired greeting and connection instructions for your callers.

**Step 8:** Click **Save**.

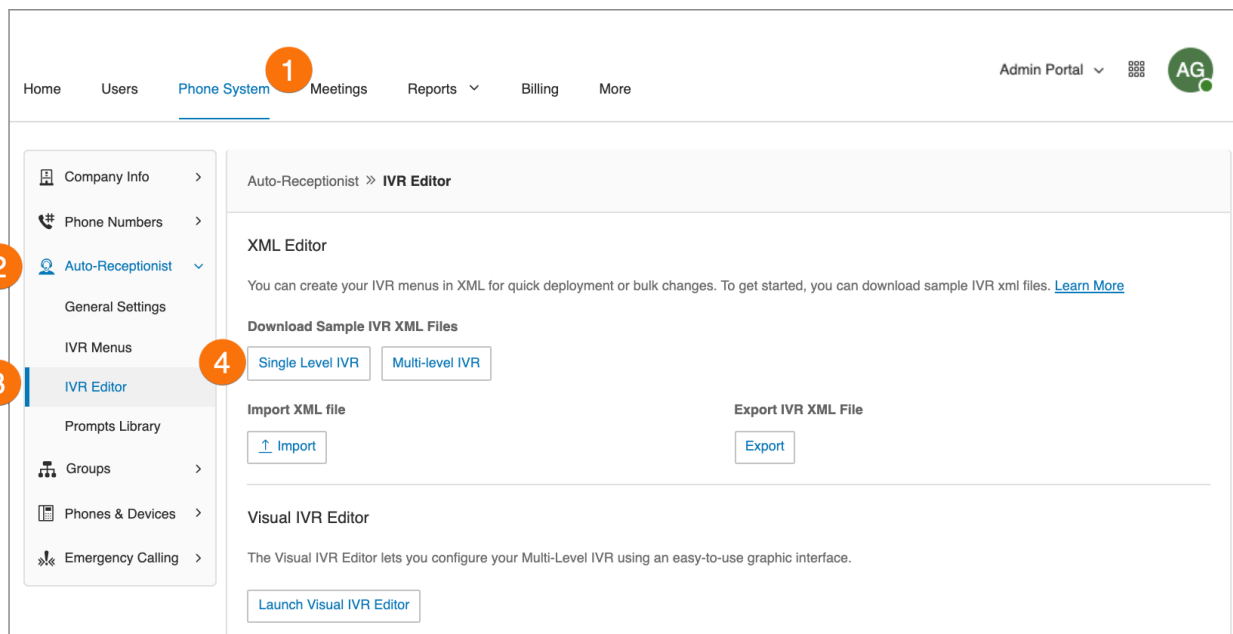
## Importing or exporting XML files

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

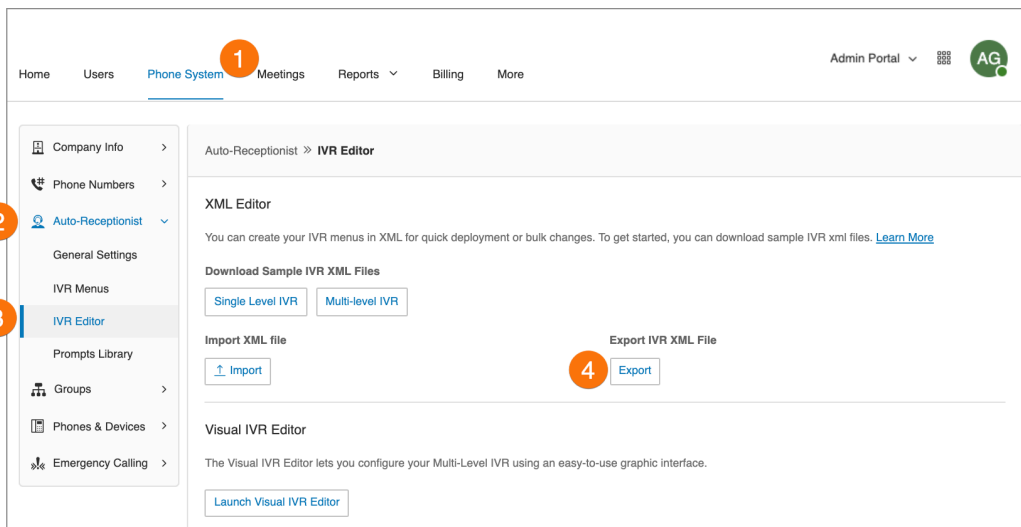
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**. The XML Editor displays.
4. Under **Download Sample IVR XML Files**,
  - Click **Single Level IVR**.
  - OR
  - Click **Multi-level IVR**.

The sample XML file is downloaded to your browser.



## Exporting an XML file

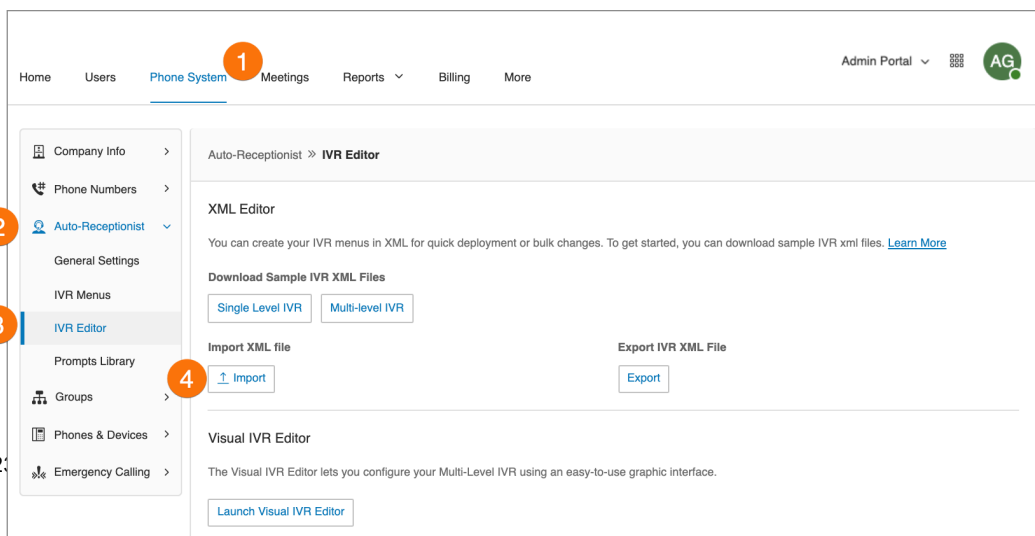
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**. The **XML Editor** displays.
4. Under **Export IVR XML File**, click **Export**. The sample XML file is exported to your browser.



## 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.



## Recording greetings and messages

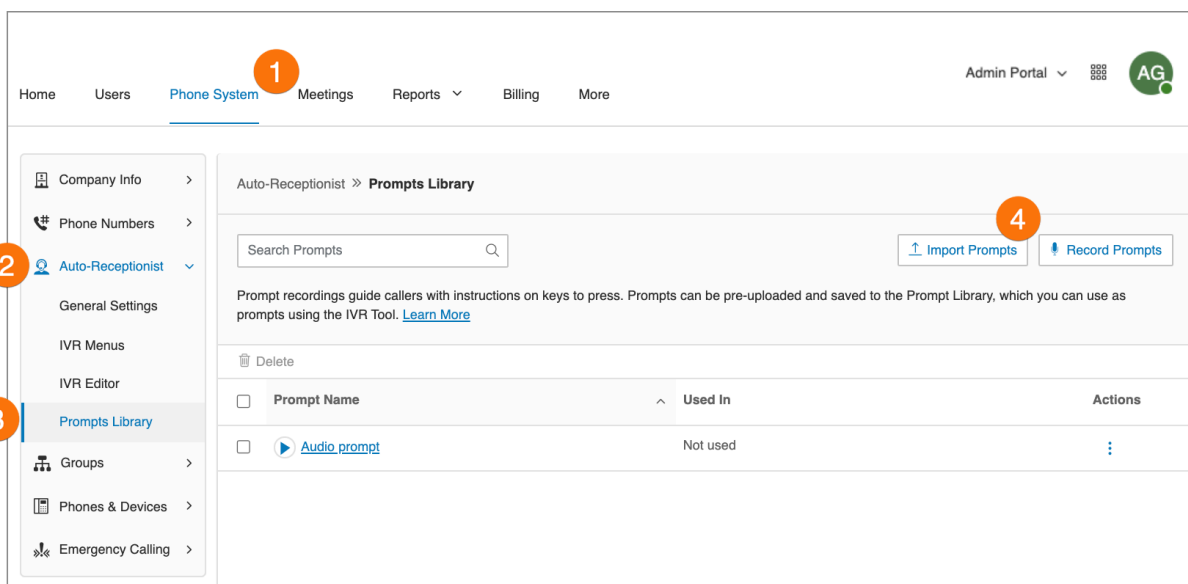
Several tasks require admins to record messages or greetings for your RingCentral system. These steps explain how to do the following:

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

### Importing a WAV file for your IVR prompt

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

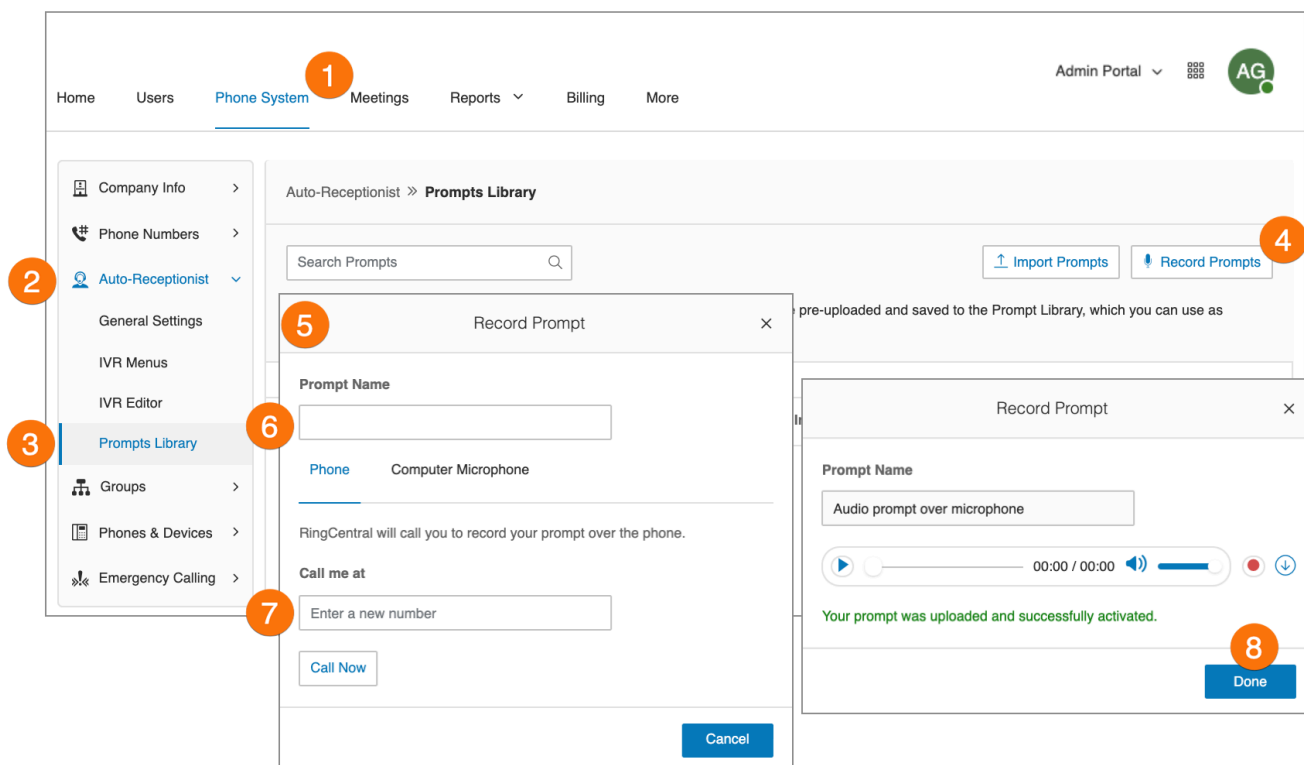
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click the **Import Prompts** button.
5. Navigate to the prompt file location.
6. Select the file and click **Open**.



## Recording a prompt over the phone

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

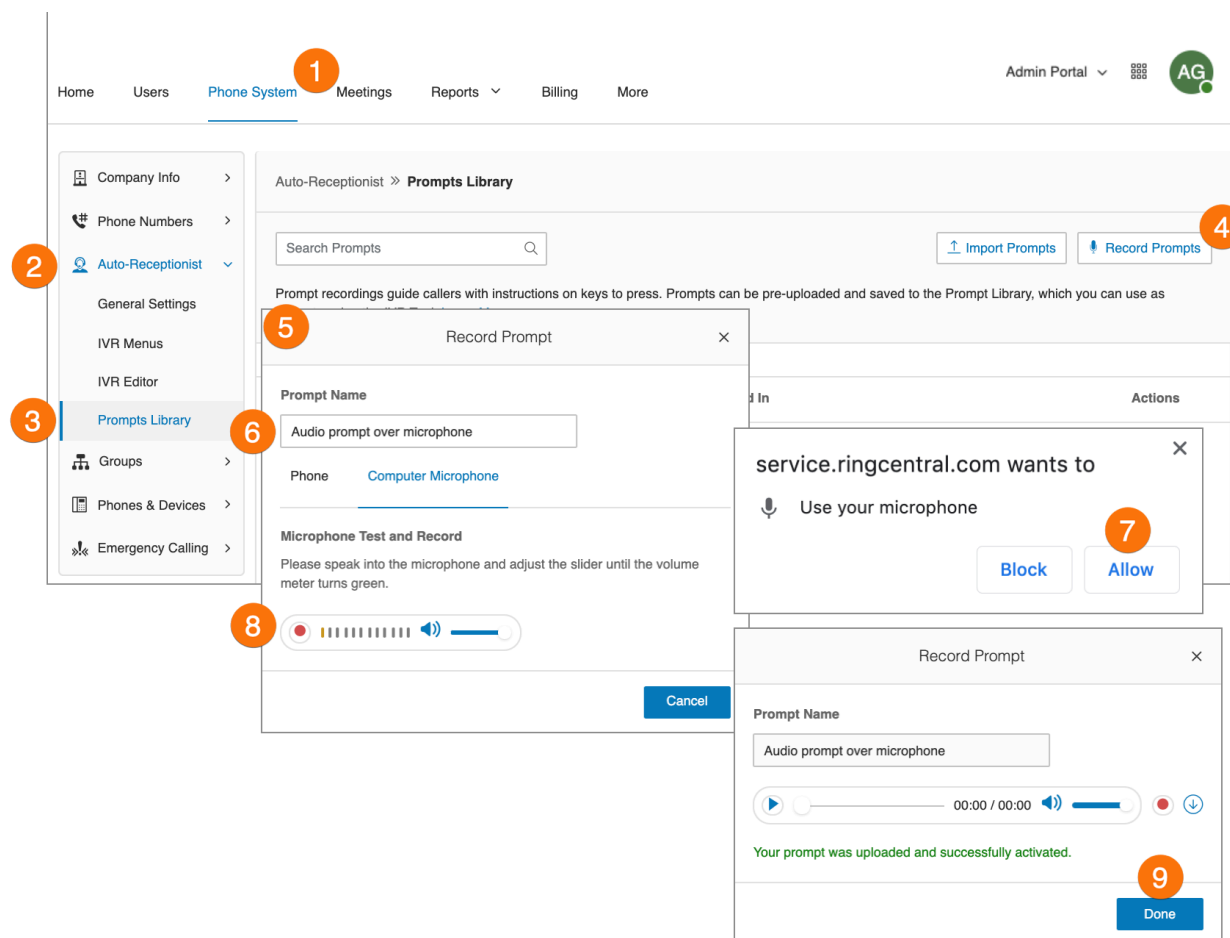
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. The **Record Prompt** window appears.
6. Enter a name in the text field next to **Prompt Name**.
7. Click **Phone**.
  - In the **Call me at** field, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field.
  - Click the **Call Now** button, and RingCentral will call you to record your message. Record your IVR prompt over your phone when prompted.
8. Click **Done**.



## Recording a prompt using your computer microphone

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

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



## Company custom rules

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

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

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

### Creating a custom rule

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

**1** Phone System

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

**2** Auto-Receptionist

**3** IVR Settings

**4** Add Custom Rule

**5** Add Rule

Auto-Receptionist >> General Settings

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

**Company Hours**  
24 hours

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

**Business Hours** After Hours

Incoming calls will be routed to

- ☒ Company Greeting ⓘ
- ☐ User Extension ⓘ
- ☐ Call Queue Group ⓘ
- ☐ Shared Line ⓘ
- ☐ Voicemail ⓘ
- ☐ Announcement ⓘ

Play company greeting

00:00 / 00:00

If caller enters no action: Disconnect [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](#)

Custom Answering Rule

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

[Learn more about advanced call handling](#)

+ Add Rule

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

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



**Custom Answering Rule**

1 Name Rule 2 Define Conditions 3 Define Call Handling

Enter a descriptive name for the rule.

Your Rule Name **6**

My Rule 1

Cancel Next

---

**Custom Answering Rule**

**7** ✓ Name Rule 2 Define Conditions 3 Define Call Handling

☐ Caller ID  
None

☐ Called Number  
None

☐ Date and/or Time  
None

Back Next

## Custom answering rule conditions

### Custom rule condition - Caller ID

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

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

**Custom Answering Rule**

✓ Name Rule   2 Define Conditions   3 Define Call Handling

1 ☒ **Caller ID**

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

Type Phone Number or Contact Name ⓘ

2  [Add](#)

(850) 555-5555

☐ **Called Number**  
None

☐ **Date and/or Time**  
None

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

---

**Custom Answering Rule**

✓ Name Rule   ✓ Define Conditions   3 Define Call Handling

4 Incoming calls will be routed to

☒ **Company Greeting** ⓘ

☐ User Extension ⓘ

☐ Call Queue Group ⓘ

☐ Shared Line ⓘ

☐ Voicemail ⓘ

☐ Announcement ⓘ

Play company greeting

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

If caller enters no action: Disconnect

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

## Custom rule condition - Called Number

Called Number applies the rule to the phone number dialed.

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

5. Click **Save**.

The image shows three sequential screenshots of the RingCentral Admin interface for configuring a Custom Answering Rule.

**Screenshot 1: Custom Answering Rule - Define Conditions**  
 The 'Define Conditions' tab is active. Under 'When Selected Number(s) is Called:', the 'Called Number' checkbox is selected (marked with a red circle 1). A 'Select Number' button is visible (marked with a red circle 2). The 'Date and/or Time' checkbox is unselected.

**Screenshot 2: Select Number**  
 A dialog box titled 'Select Number' shows a list of phone numbers. The first number, '(205) 454-1927', is selected (marked with a red circle 3). The 'Done' button is highlighted.

**Screenshot 3: Custom Answering Rule - Define Call Handling**  
 The 'Define Call Handling' tab is active. Under 'Incoming calls will be routed to:', the 'Company Greeting' radio button is selected (marked with a red circle 4). The 'Play company greeting' section shows a play button and a volume slider. The 'Save' button is highlighted (marked with a red circle 5).

**Custom rule condition - Date and/or Time**

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

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

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

The image displays two screenshots of the 'Custom Answering Rule' configuration interface, illustrating the steps to define call handling conditions and actions.

**Top Screenshot (Step 2: Define Conditions):**

- Caller ID:** None
- Called Number:** None
- Date and/or Time:** Selected. Rules apply based on a time of the day and week every week, or on a specific date range.
- Select When This Rule Should be Active:** Weekly Schedule (selected), Specific Date Range.
- Schedule:**
  - Sunday:** Off
  - Monday:** On, From 12:00 PM to 1:00 PM, 24 hours checkbox unchecked, Apply to button.
  - Tuesday:** On, From 12:00 PM to 1:00 PM, 24 hours checkbox unchecked, Apply to button.
  - Wednesday:** On, From 12:00 PM to 1:00 PM, 24 hours checkbox unchecked, Apply to button.
  - Thursday:** On, From 12:00 PM to 1:00 PM, 24 hours checkbox unchecked, Apply to button.
  - Friday:** On, From 12:00 PM to 1:00 PM, 24 hours checkbox unchecked, Apply to button.
  - Saturday:** Off
- Navigation:** Back, Next buttons.

**Bottom Screenshot (Step 3: Define Call Handling):**

- Incoming calls will be routed to:**
  - Company Greeting:** Selected.
  - User Extension
  - Call Queue Group
  - Shared Line
  - Voicemail
  - Announcement
- Play company greeting:** Duration 00:00 / 00:00, Play button, Volume icon.
- If caller enters no action:** Disconnect, Edit link.
- Navigation:** Back, Save buttons.

## 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**.

## 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.

## 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**.

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

2 Company Info > 3 Phone Numbers > Auto-Receptionist > **Groups** > **Call Queues** > Paging Only > Shared Lines > Park Locations > Call Monitoring > Others > Phones & Devices > Emergency Calling >

Groups » **Call Queues**

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

Search  + New Call Queue

**Add Call Queue**

1 Add Call Queue Details 2 Select Managers 3 Select Members

5 Group Name Extension Number

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

7 Cancel Next

**Add Call Queue**

✓ Add Call Queue Details 2 Select Managers 3 Select Members

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

PIN

Reenter PIN

Select Managers

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

Search

Show All | Show Selected (1)

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

Total: 1 < 1 > Back Next

**Add Call Queue**

✓ Add Call Queue Details ✓ Select Managers 3 Select Members

Search  Department: All

Show All | Show Selected (1)

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

Total: 1 < 1 > Back Done



## 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

- e. **Pickup Settings & Members**
    - Pickup members
    - Alert timer
  - f. **Messages & Notifications**
    - Voicemail Greeting
    - Message Recipient
    - Notification Settings
6. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface for configuring Call Queues. The top navigation bar includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The left sidebar contains a list of navigation options, with Groups (highlighted with a red circle 2) and Call Queues (highlighted with a red circle 3) being the active path. The main content area shows the 'Call Queues' configuration page, which includes a search bar, a 'New Call Queue' button, and a table of existing call queues. The table has columns for Status and Name, with 'Call Queue Test' (highlighted with a red circle 4) and 'Call Queues Test Two' listed. The right panel shows the configuration details for 'Call Queue Test (Ext. 11001)', including sections for Call Queue Details, Direct Numbers, Greeting & Hold Music, Call Handling & Members, Pickup Settings & Members, and Messages & Notifications. The 'Messages & Notifications' section is expanded, showing options for Business Hours, After Hours, and Settings. The 'Voicemail greeting' section is set to 'Custom' with a play button and a timer. The 'Message Recipient' section is set to 'This Call Queue (Ext. 11001)'. The bottom right corner features a 'Save' button (highlighted with a red circle 6) and a 'Cancel' button.

## Configuring call queue-to-queue overflow

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

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

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

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

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

Admin Portal AG

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](#)

**Call Queues**

Stat...	Name
✓	<a href="#">Call Queue Test</a>
✓	<a href="#">Call Queues Test Two</a>

**Call Queue Test (Ext. 1)**

**Call Queue Details**

**Direct Numbers**

**Greeting & Hold Music**

**Call Handling & Members**

**Business Hours** After Hours Wait Settings Display Settings

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

Rotating [+ Custom Rules](#)

**Greeting & Hold Music**

**Call Handling & Members**

**Business Hours** After Hours Wait Settings Display Settings

☒ Enable Send Calls to Overflow Queue [?](#)

Select call queues (3 maximum)

Search

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

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

## Adding a direct number

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

The screenshot illustrates the process of adding a direct number to a call queue in the RingCentral Admin Portal. The interface is divided into several sections:

- Top Navigation Bar:** Includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The Admin Portal logo is on the right.
- Left Sidebar:** Contains a list of navigation items: Company Info, Phone Numbers, Auto-Receptionist, Groups (highlighted with a red circle 2), Call Queues (highlighted with a red circle 3), Paging Only, Shared Lines, Park Locations, Call Monitoring, Others, and Phones & Devices.
- Main Content Area:**
  - Groups >> Call Queues:** The breadcrumb trail at the top of the main content area.
  - Create a call queue:** A section with a search bar and a '+ New Call Queue' button.
  - Call Queue Test (Ext. 1):** A modal window showing details for a selected call queue. It includes a table with columns 'Stat...' and 'Name', listing 'Call Queue Test' and 'Call Queues Test Two'. Below the table is a section for 'Direct Numbers' (highlighted with a red circle 5) and an '+ Add Direct Number' button (highlighted with a red circle 6).
- Add Direct Number Modal:** A modal window (highlighted with a red circle 7) for adding a new direct number. It has three tabs: '1 Select Numbers' (active), '2 Confirm Order', and '3 Order Confirmation'. The 'Select Numbers' tab contains:
  - Location:** A dropdown menu with 'Domestic - US/Canada' selected.
  - Number Type:** A dropdown menu with 'Local Number' selected.
  - State:** A dropdown menu with 'State' selected.
  - Area Code:** A dropdown menu with 'Area Code' selected.
  - Add Numbers:** A button to add the selected numbers.
- Bottom Right:** A 'Cancel' button and a 'Next' button (highlighted with a red circle 8) to proceed to the next step.

## Setting call queue greeting and hold music

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

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

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

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

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

7. Click **Done**.

8. Click **Save**.

## Incoming call handling

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

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

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

Admin Portal AG

Company Info >

Phone Numbers >

Auto-Receptionist >

Groups >

**Call Queues**

Paging Only

Shared Lines

Park Locations

Call Monitoring

Others

Phones & Devices >

Emergency Calling >

Groups » **Call Queues**

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

Search

+ New Call Queue

Stat...	Name
✓	<a href="#">Call Queue Test</a>
✓	<a href="#">Call Queues Test Two</a>

Call Queue Test (Ext. 1)

Call Queue Details

Direct Numbers

Greeting & Hold Music

Call Handling & Members

Business Hours After Hours Wait Settings Display Settings

Decide How Calls Get Transferred to Group Members

Rotating

+ Add Call Queue Member

Name	Ext.	Actions
Hank Hill	101	

Cancel Save

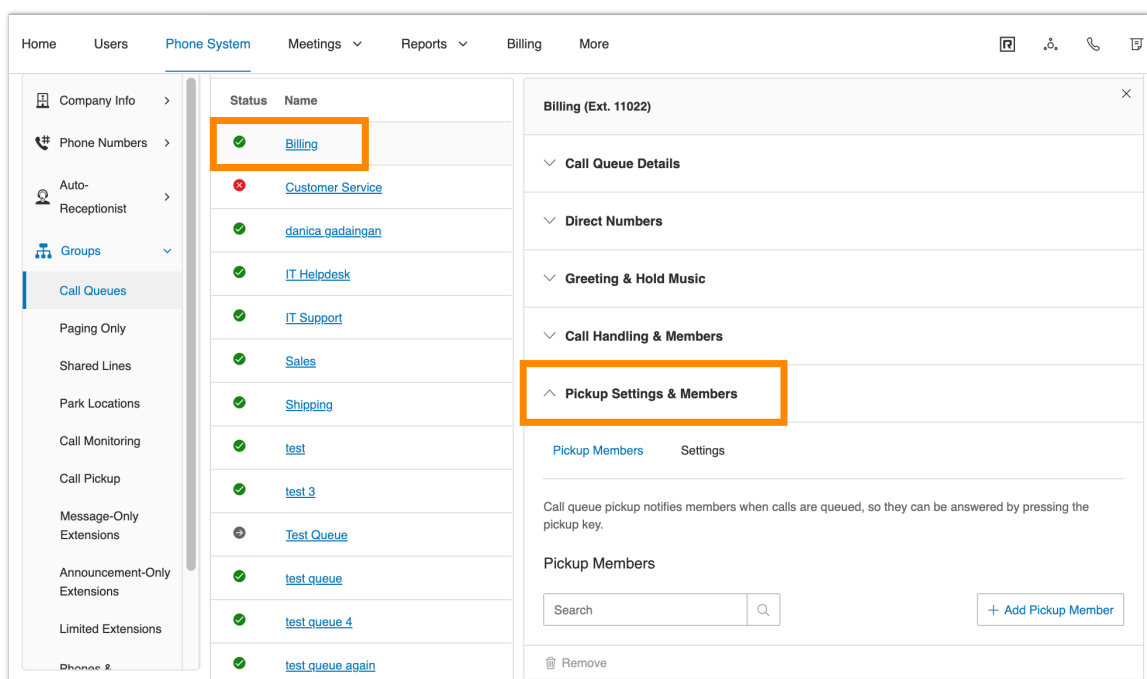


## Pickup Settings & Members

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**.

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**.

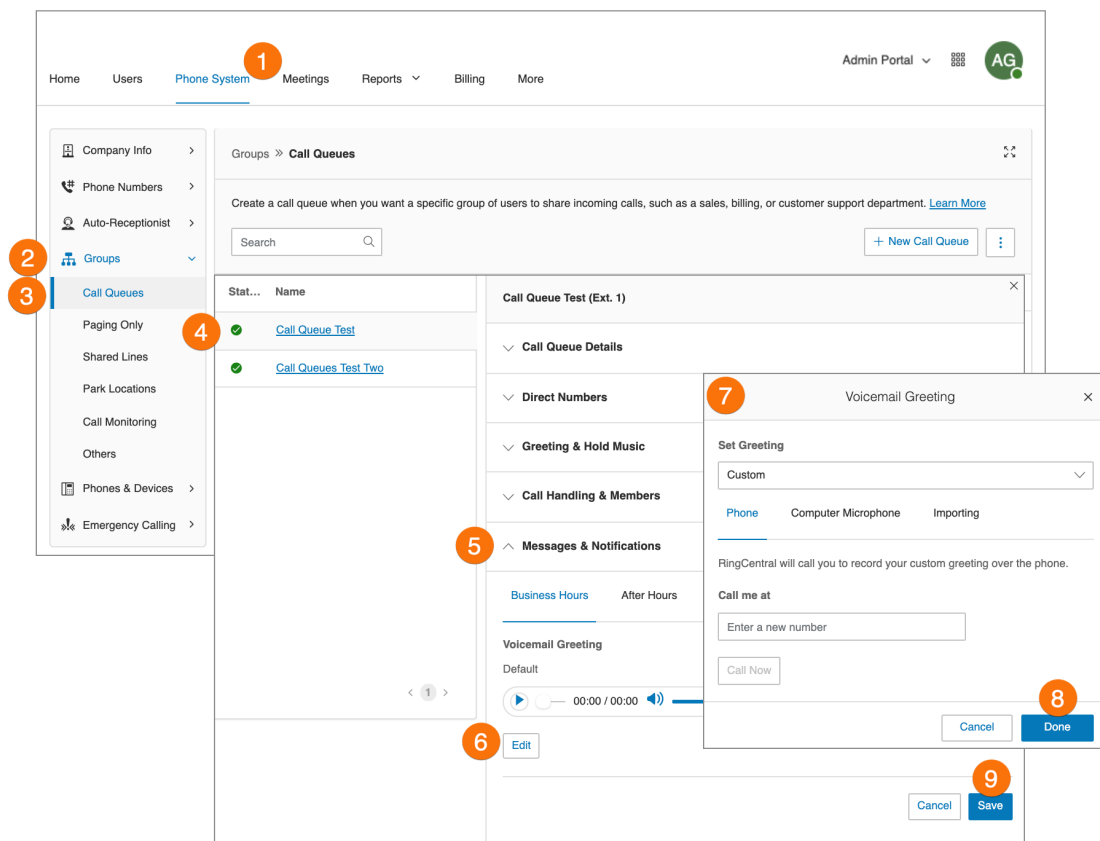
## Messages and notifications

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

- **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**.



## Setting message recipients

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

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

The screenshot illustrates the process of setting message recipients for a call queue in the RingCentral Admin Portal. The interface is divided into a left sidebar, a main content area, and a modal window.

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

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

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

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

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

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

**Step 7:** The **Select Message Recipient** modal window appears, showing a list of potential recipients.

**Step 8:** The checkbox next to **Hank Hill** (User, Ext. 101) is selected.

**Step 9:** The **Done** button is clicked in the modal window.

**Step 10:** The **Save** button is clicked at the bottom of the main content area.

The modal window displays the following table:

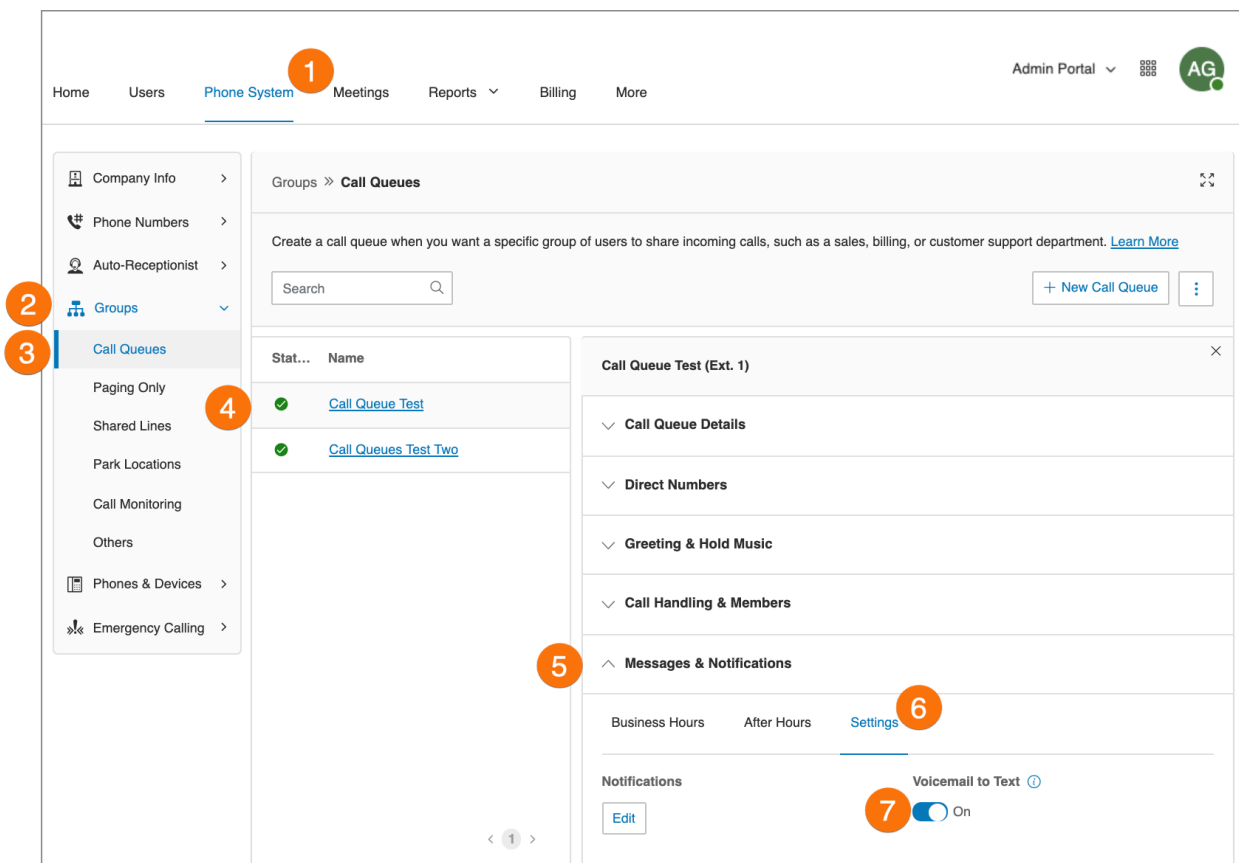
Select	Name	Ext.	Type	Department
<input checked="" type="checkbox"/>	Hank Hill	101	User	
<input type="checkbox"/>	This call queue	1	Call Queue	

At the bottom of the modal, it shows **Total: 2**, a **Show 10** dropdown, and **Cancel** and **Done** buttons.

## Setting voicemail-to-text transcription

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

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



## Setting notifications

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

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

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

Admin Portal AG

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

Groups >> **Call Queues**

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

Search [+ New Call Queue](#)

Stat...	Name
✓	<a href="#">Call Queue Test</a>
✓	<a href="#">Call Queues Test Two</a>

**Call Queue Test (Ext. 1)**

Call Queue Details

Direct Numbers

Greeting & Hold Music

Call Handling & Members

Messages & Notifications

Business Hours After Hours **Settings**

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

**Notifications**

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

Send Notifications to

Manager Name Emails

Hank Hill stricklandpropane135iosgatosrd@gmail.com

Email

Email@example.com

Select Carrier Phone Number

Select Carrier  [+ Add](#)

My carrier is not listed

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

## Paging only groups

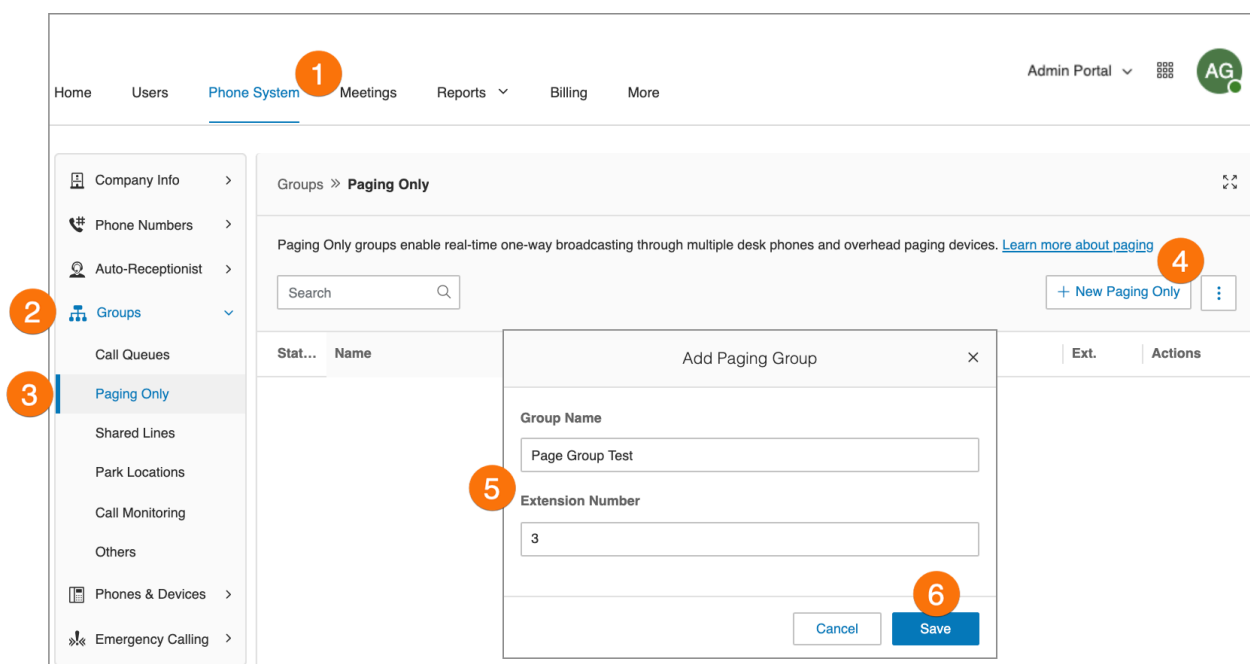
Paging Only groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices. Paging Only groups are great for a variety of locations such as warehouse/shipping centers, retail stores, schools, and hospitals, among others.

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

### Adding a paging only group

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

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





## Configuring a paging only group

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

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

The screenshot illustrates the 'Paging Only' configuration process in the RingCentral Admin Portal. The interface is divided into several sections:

- Navigation Sidebar (Left):** Contains links for Company Info, Phone Numbers, Auto-Receptionist, Groups, Call Queues, Shared Lines, Park Locations, Call Monitoring, Others, Phones & Devices, and Emergency Calling. The 'Groups' link is highlighted with a red circle 2.
- Main Content Area (Top):** Displays the 'Paging Only' group configuration. It includes a search bar, a '+ New Paging Only' button, and a list of existing groups. The 'Paging - Customer Service (Ext. 1)' group is selected, and its details are shown in a modal window. The 'Paging Only Details' section includes fields for Extension Number (1), Group Name (Paging - Customer Service), and Status (Enabled). A red circle 1 highlights the 'Paging Only' header, and a red circle 3 highlights the 'Groups' link in the sidebar.
- Modal Windows:**
  - Paging - Customer Service (Ext. 1) Details:** A modal window showing the details of the selected group. It includes a 'Cancel' button and a 'Save' button. A red circle 6 highlights the 'Save' button.
  - Paging - Customer Service (Ext. 1) Users:** A modal window showing a list of users allowed to page this group. It includes a search bar, a 'Department' dropdown, and a 'Sites' dropdown. The list of users is displayed with checkboxes for selection. A red circle 9 highlights the 'Users Allowed to Page this Group' tab.
  - Paging - Customer Service (Ext. 1) Devices:** A modal window showing a list of devices allowed to receive pages. It includes a search bar, a 'Phone Type' dropdown, and a 'Sites' dropdown. The list of devices is displayed with checkboxes for selection. A red circle 8 highlights the 'Devices to Receive Page' tab.

Red circles 1 through 10 highlight specific elements in the interface, indicating the steps for configuring the 'Paging Only' group.

## Shared line groups

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

### Adding a shared line group

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

The screenshot illustrates the 'Add Shared Line' process in the RingCentral Admin Portal. The top navigation bar shows the 'Phone System' tab selected (1). The left sidebar shows the 'Groups' menu (2) and the 'Shared Lines' sub-menu (3). The main content area displays 'Groups > Shared Lines' (4). The 'Add Shared Line' window is open, showing a progress bar with steps 1-6. Step 5, 'Select a Location', has 'Domestic' selected (5). Step 6, 'Group Details', includes fields for 'Site' (Company), 'Group Name' (Group 1), 'Manager's Email' (stricklandpropane135iosgatosrd@gmail.com), and 'Short Extension Number' (6). The 'Full Extension Number' is displayed as 11006. A 'Next' button (7) is at the bottom right.

## Configuring a shared line group

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

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

## Adding a direct number

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

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

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

## Setting a greeting

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

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

## Managing blocked calls

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

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

7. Click 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:**

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

## Managing outbound caller ID

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

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

## Messages and notifications

Set up a group voicemail and notification options.

### Setting up voicemail greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click **Shared Lines**.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.
6. **Take Messages** feature is enabled by default. To disable the group from taking messages during business hours, uncheck **Enable**.
7. Click the **Play** button to listen to the default voicemail greeting. To customize, click **Edit** below **Voicemail Greeting**.
8. Click the drop-down box under **Set Greeting**, then select **Custom**.
9. Click the tab corresponding to how you prefer to customize the greeting:
  - **Phone**: Next to **Call me at**, choose a phone number from the dropdown list if you have saved numbers or type a phone number in the text field. Click the **Call Now** button, and RingCentral will call you to record your message.
  - **Computer Microphone**: Click Allow if RingCentral asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red Record button to record your company greeting.
  - **Importing**: Browse for a WAV or MP3 file you want to use. Click **Open**.
10. Click **Done**.
11. Click **Save**.



## Setting a message recipient

Set a message recipient for a Shared Line.

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

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

## Setting voicemail-to-text

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

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

## Setting notifications

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

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



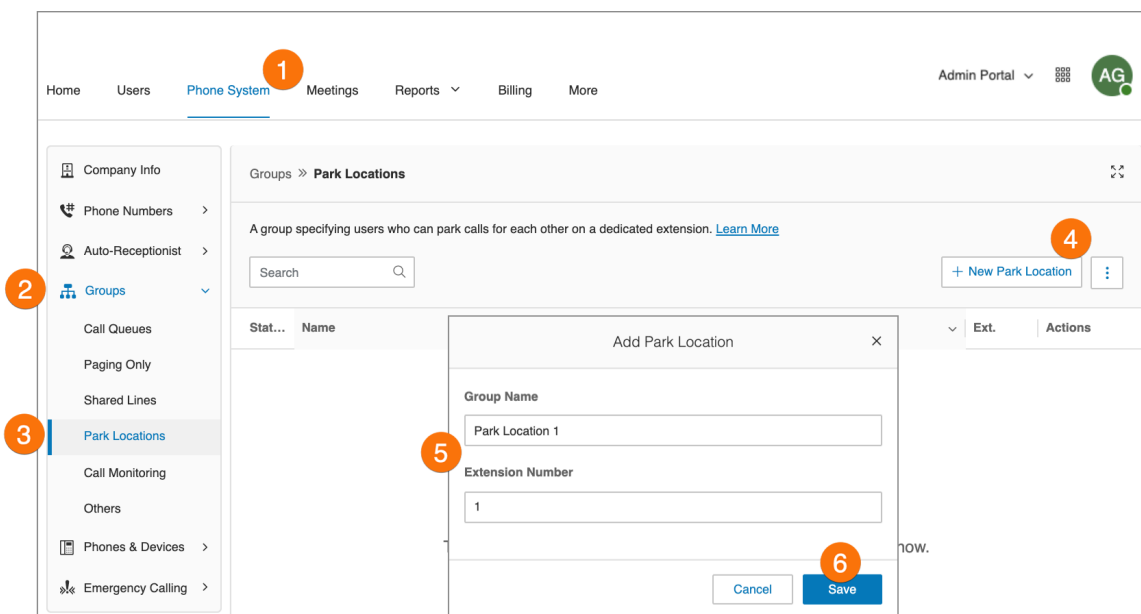
## Park location groups

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

### Adding a park location

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

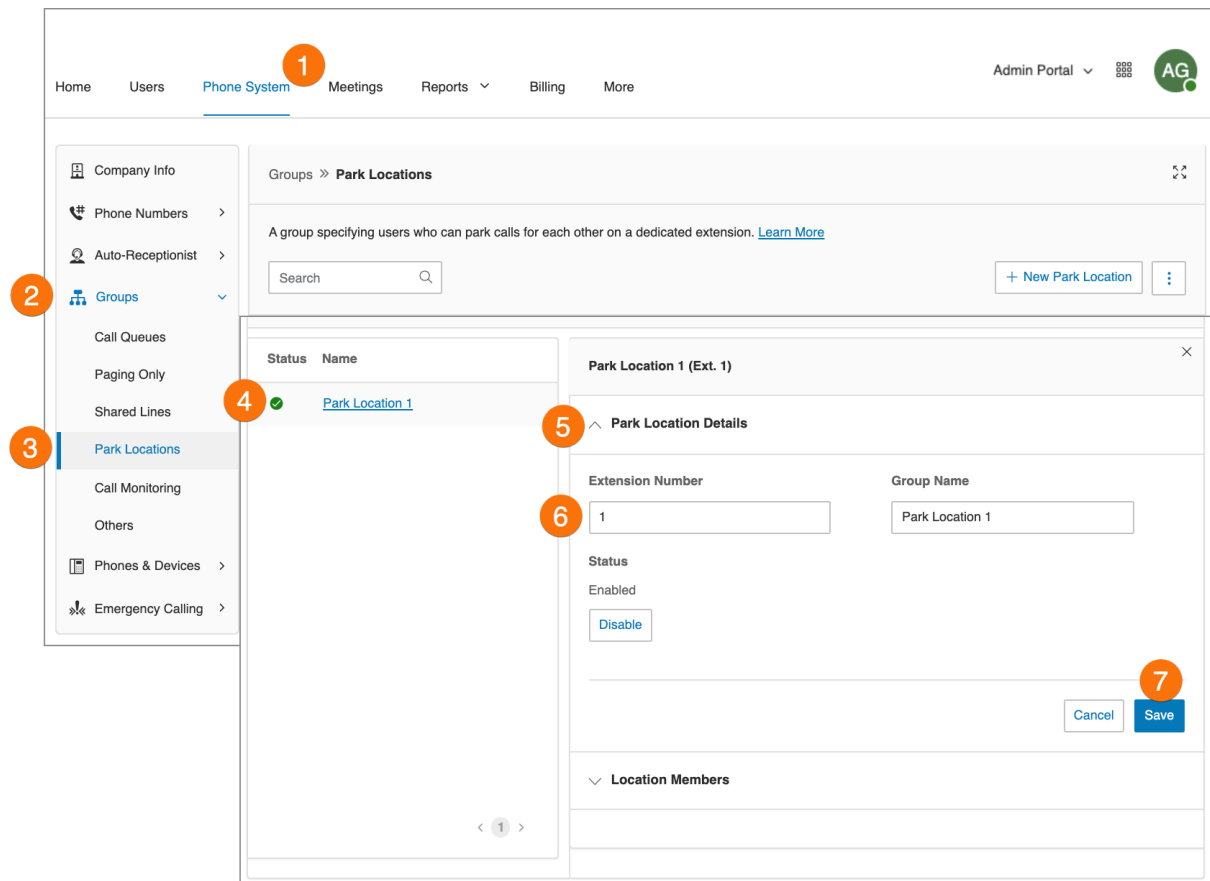


## Configuring a park location

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.

The screenshot illustrates the steps to add members to a Park Location in the RingCentral Admin Portal. The interface is divided into a top navigation bar, a left sidebar, and a main content area.

- Step 1:** The **Phone System** tab is selected in the top navigation bar.
- Step 2:** The **Groups** menu item is selected in the left sidebar.
- Step 3:** The **Park Locations** menu item is selected in the left sidebar.
- Step 4:** The **Park Location 1** is selected in the **Park Locations** list.
- Step 5:** The **Location Members** section is expanded.
- Step 6:** The user **Hank Hill** is selected in the **Location Members** list.
- Step 7:** The **Save** button is clicked.
- Step 8:** An alert window appears with the message: "To enable this Park Location on your selected users' phones, please go to Users list, select the user and configure the Park Location extension in Phones & Numbers > Phones > Presence > Appearance." The **OK** button is clicked.

## Setting up presence appearance

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

## Call monitoring groups

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

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

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

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

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



## Adding and configuring a call monitoring group

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

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

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

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

Groups » **Call Monitoring**

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

Search **4** + New Call Monitoring

**Call Monitoring Group**

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

Group Name **5** Call Monitoring Group 1 **6** Cancel Next

**Call Monitoring Group**

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

Select users that can monitor this group.

Search Sites

Show All | Show Selected (1)

<input checked="" type="checkbox"/>	Name	Ext.	Type	Site
<b>7</b> <input checked="" type="checkbox"/>	Hank Hill	11101	User	Company
<input type="checkbox"/>	Joe Hall	11102	User	Company

Total: 2 Show 10 < 1 >

**8** Back Next

**Call Monitoring Group**

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

Select users that can be monitored.

Search Sites

Show All | Show Selected (1)

<input checked="" type="checkbox"/>	Name	Ext.	Type	Site
<input type="checkbox"/>	Hank Hill	11101	User	Company
<b>9</b> <input checked="" type="checkbox"/>	Joe Hall	11102	User	Company

Total: 2 Show 10 < 1 >

**10** Back Save

## Directed call pickup

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

### Adding a call pickup group

To add a new call pickup group:

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

The screenshot shows the 'Add Directed Call Pickup' window with two tabs: '1 Add Details' (active) and '2 Select Members'. Below the tabs, a text box explains: 'Directed Call Pickup group allows you to pick up a call ringing on specific line.' Under the heading 'Group Name', there is a text input field containing 'Emerald'. Below that, under the heading 'Site', there is a dropdown menu with 'Company' selected. At the bottom right, there are 'Cancel' and 'Next' buttons. An orange circle with the number '5' is overlaid on the left side of the form, and another orange circle with the number '6' is overlaid on the 'Next' button.

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

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

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

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

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

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

Total: 8

Show   <  >

## Message-only extensions

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

### Adding a message-only extension

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

The screenshot illustrates the process of adding a message-only extension in the RingCentral Admin Portal. The interface includes a top navigation bar with tabs like Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Phone System' tab is selected, and the 'Admin Portal' dropdown is visible. On the left, a sidebar menu shows 'Groups' and 'Message-Only Extensions' highlighted. The main content area displays 'Groups > Message-Only Extensions' with a search bar and a '+ New Message-Only Extension' button. A table lists existing extensions, including 'Message-Only Ext' with site 'Company' and extension number '11011'. An 'Add Message-Only Extension' modal window is open, showing fields for Site (a dropdown menu), Extension Name, Short Extension Number, Full Extension Number (with a minus sign), and Email. The modal has 'Cancel' and 'Save' buttons at the bottom.

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

2. Click **Groups**.

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

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

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

6. Click **Save**.

## Configuring a message-only extension

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

### Managing extension details

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

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

1

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

Admin Portal AG

2

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

Groups » Message-Only Extensions

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

Search Sites + New Message-Only Extension

Change Site

Status	Name
<input type="checkbox"/>	<b>4</b> Message-only Ext

5

Message-only Ext (Ext. 11011)

Message-Only Extension Details

General Settings

Short Extension Number  
11  
Full Extension Number: 11011

Record Extension Name  
Message-only Ext (Default)  
Edit

Extension Name  
Message-only Ext

Company Name

Contact Phone

Email  
stricklandpropane135lososrd@gmail

Status  
Not Activated  
Send Invite

Delete Group Cancel **6** Save

Message-only Ext (Ext. 11011)

Message-Only Extension Details

General **7** Settings

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

Site  
Company  
Edit

Confirmation Message  
3 seconds  
Edit

## Recording an extension name

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

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



1

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

Admin Portal AG

2

3

4

5

6

7

8

9

Company Info

Phone Numbers >

Auto-Receptionist >

Groups >

Call Queues

Paging Only

Shared Lines

Park Locations

Call Monitoring

Call Pickup

**Message-Only Extensions**

Announcement-Only Extensions

Phones & Devices >

Emergency Calling >

Groups » **Message-Only Extensions**

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

Search Sites + New Message-Only Extension

Change Site

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

Message-only Ext (Ext. 11011)

**Message-Only Extension Details**

General Settings

Short Extension Number: 11

Full Extension Number: 11011

Extension Name: Message-only Ext

Company Name

Email: stricklandpropane135losgatosrd@gmail

Record Extension Name: Message-only Ext (Default)

Contact Phone

Status: Not Activated

Send Invite

Record by: RingCentral text-to-speech

✓ RingCentral text-to-speech

Record extension name

Cancel Save

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**.

The screenshot illustrates the process of adding a direct number to a message-only extension in the RingCentral Admin Portal. The main interface shows the 'Phone System' tab, 'Groups' > 'Message-Only Extensions', and a list of extensions. A 'Message-only Ext (Ext. 11011)' is selected, and the 'Direct Numbers' section is expanded. The 'Add Direct Number' window is open, showing the 'Select Numbers' step with a list of available numbers. The 'Charges and credits' table is also visible, showing the cost of the additional local number.

**Charges and credits table:**

Period	Charges and credits	Unit Price	Quantity	Amount
02/28/2021 - 02/27/2022	Additional Local Number (new purchase)	\$50.00	1	\$50.00
02/28/2021 - 02/28/2021	Additional Local Number - Prorate Adjustment	(\$1.94)	1	(\$1.94)
Charges after Discounts and Prorates:				\$48.06
Taxes				Amount
State and local taxes and fees				\$1.98
FED. TAX				\$8.72
Taxes after Discounts and Prorates:				\$10.70
Total charges after discounts and prorates:				\$58.76
Total Taxes and Fees:				\$10.70
Sub-total:				\$69.46
Total Charged to Credit Card:				\$69.46

## Designating a message recipient

Choose an extension to receive and save messages.

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

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

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

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

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

**Step 4:** A message-only extension is selected from the list in the main content area.

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

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

**Step 7:** A user is selected from the list in the **Select Message Recipient** modal window.

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

**Step 9:** The **Save** button is clicked in the main content area.

The **Select Message Recipient** modal window displays a table of available extensions:

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

Total: 5

## Setting a voicemail greeting

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

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

1. Click **Phone System** in the top navigation bar.

2. Click **Groups** in the left sidebar.

3. Click **Message-Only Extensions** in the left sidebar.

4. Click the **Message-only Ext** link in the table.

5. Click the **Messages & Notifications** section header.

6. Click the **Edit** button.

7. Click the **Set Greeting** dropdown in the **Voicemail Greeting** section.

8. Click the **Done** button in the **Voicemail Greeting** modal.

9. Click the **Save** button in the **Message-only Ext** modal.

## Setting voicemail-to-text

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

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Phone System' tab is selected, indicated by a red circle with the number 1. The left sidebar contains a list of navigation items, with 'Groups' (2) and 'Message-Only Extensions' (3) highlighted. The main content area shows the 'Message-Only Extensions' page. A table lists existing extensions, with 'Message-only Ext' (4) selected. The right-hand panel displays the configuration for this extension, including sections for 'Message-Only Extension Details', 'Direct Numbers', and 'Messages & Notifications'. Within the 'Messages & Notifications' section, the 'Settings' tab (6) is active, showing the 'Voicemail to Text' toggle switch (7) set to 'On'.

## 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**.

The screenshot displays the RingCentral Admin Portal interface for configuring Message-Only Extensions. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Phone System' tab is selected, and the 'Admin Portal' dropdown is visible. The left sidebar contains a list of navigation options, with 'Message-Only Extensions' highlighted. The main content area shows the 'Message-Only Extensions' configuration page, which includes a search bar, a list of extensions, and a detailed view of a specific extension. The detailed view includes sections for 'Message-Only Extension Details', 'Direct Numbers', and 'Messages & Notifications'. The 'Messages & Notifications' section has tabs for 'General' and 'Settings'. The 'Settings' tab is active, showing a table for notifications and a section for sending notifications to an email address.

**1** Admin Portal

**2** Groups

**3** Message-Only Extensions

**4** Message-only Ext

**5** Message-only Ext (Ext. 11011)

**6** Settings

**7** Edit

**8** Notifications

**9** Save

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

Send Notifications to

Email

stricklandpropane135osgatosrd@gmail.com

Select Carrier

Phone Number

Select Carrier

+ Add

My carrier is not listed

Cancel Save



## Announcement-only extensions

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

### Adding an announcement-only extension

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

The screenshot illustrates the process of adding an announcement-only extension in the RingCentral Admin Portal. The interface includes a top navigation bar with tabs like Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Phone System' tab is selected, and the 'Groups' menu item is highlighted in the left sidebar. The 'Announcement-Only Extensions' section is active, displaying a table with one entry: 'Announcement Only Extension' at the 'Company' site. A modal window titled 'Add Announcement-Only Extension' is open, showing fields for Site, Extension Name, Short Extension Number, Full Extension Number, and Email. The 'Save' button is visible at the bottom of the modal.

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**.

## Editing announcement-only extension details

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

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

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

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

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

The 'Announcement Only Extension (Ext. 11012)' modal is open, showing the 'Announcement-Only Extension Details' configuration page. The modal has tabs for 'General' and 'Settings'. The 'General' tab is active, showing fields for 'Short Extension Number' (12), 'Full Extension Number: 11012', 'Extension Name' (Announcement Only Extension), 'Company Name' (Panes Company), 'Contact Phone', 'Email' (stricklandpropane135@sgatosrd@gmail), and 'Status' (Not Activated). A 'Send Invite' button is also visible. The modal is highlighted with a red circle 5.

The 'Settings' tab is also shown, with fields for 'Regional Settings' (GMT-08:00, English (U.S.)) and 'Site' (Company). Both have 'Edit' buttons. The 'Confirmation Message' is set to '3 seconds' and also has an 'Edit' button. The 'Settings' tab is highlighted with a red circle 8.

At the bottom of the modal, there are 'Delete Group', 'Cancel', and 'Save' buttons. The 'Save' button is highlighted with a red circle 7.

## Adding a direct number

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

The screenshot illustrates the process of adding a direct number in the RingCentral Admin Portal. The interface is divided into a sidebar and a main content area. The sidebar contains navigation links: Home, Users, Phone System, Meetings, Reports, Billing, and More. The main content area shows the 'Announcement-Only Extensions' section, which includes a search bar, a '+ New Announcement-Only Extension' button, and a table of existing extensions. Below this, there's a 'Direct Numbers' section with an '+ Add Direct Number' button. The 'Add Direct Number' modal is shown in two states: the first state (7) shows the 'Select Numbers' step with a search bar and a list of available numbers; the second state (8) shows the 'Confirm Order' step with a table of charges and credits, including a total charge of \$65.54. The third state (9) shows the 'Order Confirmation' step with a table of charges and credits, including a total charge of \$65.54. The fourth state (10) shows the 'Next' button.

© 20

## Setting an announcement

Customize a greeting for an announcement-only extension.

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

The screenshot displays the RingCentral Admin Portal interface for configuring 'Announcement-Only Extensions'. The top navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. The 'Phone System' tab is active, and the 'Admin Portal' dropdown is visible. The sidebar on the left contains the following menu items: Company Info, Phone Numbers, Auto-Receptionist, Groups, Call Queues, Paging Only, Shared Lines, Park Locations, Call Monitoring, Call Pickup, Message-Only Extensions, Announcement-Only Extensions (highlighted), Phones & Devices, and Emergency Calling.

The main content area is titled 'Groups » Announcement-Only Extensions'. It includes a search bar, a 'Sites' dropdown, and a '+ New Announcement-Only Extension' button. Below this is a table with columns for 'Status' and 'Name'. One extension is listed with the name 'Announcement Only Extension'.

An 'Announcement Greeting' modal window is open, showing the configuration for 'Announcement Only Extension (Ext. 11012)'. The modal includes sections for 'Announcement-Only Extension Details', 'Direct Numbers', and 'Announcement'. The 'Announcement' section shows a 'Default' greeting with a duration of '00:00 / 00:00'. The 'Announcement Greeting' section shows a 'Set Greeting' dropdown set to 'Default', a 'View In' dropdown set to 'English (U.S.)', and a text area containing the default greeting: 'No one is available to take your call. Thank you for calling. Goodbye!'. A play button and a volume icon are also present. The modal has 'Cancel' and 'Done' buttons.

Numbered callouts (1-9) highlight the following elements:

1. Phone System tab in the top navigation bar.
2. Groups menu item in the sidebar.
3. Announcement-Only Extensions menu item in the sidebar.
4. Name column header in the extension table.
5. Announcement section header in the modal.
6. Edit button in the modal.
7. Set Greeting dropdown in the modal.
8. Done button in the modal.
9. Save button in the modal.

## Limited extensions

Create limited extensions for installation in a common area (meeting room or hotel room) for anyone who has the need to access basic inbound/outbound calling capabilities.

RingCentral provides the ability to separately purchase limited extensions as unassigned extensions, then later set up and activate those extensions by assigning them. Bulk purchases of up to 1,000 extensions are also supported.

A limited extension is an extension with limited features offered at a lower price. Unlike a user extension, a limited extension is not tied to a specific user. For more information, visit [RingCentral Limited Extension Overview](#).

**Note:** This feature is available on an on-demand basis. Contact RingCentral Support to discuss the requirements for enabling this feature for your account.

### Adding a limited extension

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Click **New Limited Extension**.
5. Select a location and click **Next**.
6. Enter the quantity, and select the following:
  - a. **Cost Center**
  - b. **State**
  - c. **Area Code**
  - d. **Number Option**
  - e. **Site** (if you have a multi-site account)
  - f. Device for use as limited extension
7. Click **Add**.
8. Click **Next**.
9. Select your shipping preferences.
10. Click **Next**.
11. Confirm the order. An order summary is displayed.

1

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

Admin Portal AG

2

Company Info

Company Address

Caller ID Name

Directory Assistance

Phone Numbers

Auto-Receptionist

3

Groups

Call Queues

Paging Only

Shared Lines

Park Locations

Call Monitoring

Call Pickup

Message-Only Extensions

Announcement-Only Extensions

**Limited Extensions**

Phones & Devices

Emergency Calling

6

Groups > **Limited Extensions**

Limited Extension gives admins the ability to purchase an extension with a limited feature set that is not tied to a user. [Learn More](#)

Search Status + New Limited Extension

4

5

Add Limited Extensions

1 Select Location 2 Add Limited Extensions 3 Add Shipping Info 4 Confirm

Select a Location

Domestic International

Cancel Next

7

Add Limited Extensions

✓ Select Location 2 Add Limited Extensions 3 Add Shipping Info 4 Confirm

Limited Extension - Domestic DigitalLine Basic available: 0

If the quantity of licenses added exceeds the available amount, you will be charged for the extra licenses to the selected Cost Center.

Qty	Cost Center	State	Area Code	Number Option	Device	
1	John Smith Company	Alabama	205 - Alabaster	New numbers	Existing Phone	<b>Add</b>

	Qty	Selected from Account	Additional Purchase	Subtotal
Limited Extension - Domestic Digit...	1	-	1 X \$14.99/month	\$14.99/month
Existing Phone - New	1	-	1 X \$0.00	-

Can't find the area code you're looking for?

8

Back Next

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

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



## Assigning a limited extension

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Click a limited extension with **Unassigned** status.
5. Fill out the required fields:
  - **Extension Number**
  - **Extension Name**
  - **Site**
  - **Emergency Address**
  - **Extension Email**
  - **International Calling**
6. Click **Save & Enable**. The status for the extension becomes **Assigned**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Phone System' tab is selected in the navigation bar. The left sidebar shows the 'Groups' menu expanded, with 'Limited Extensions' highlighted. The main content area shows a table of 'Limited Extensions'. One extension is selected, and its details are displayed in a form below the table.

**Table: Limited Extensions**

Status	Name	Numbers	Ext.	Msg.	Assigned Status	Actions
Assigned	test LE	(256) 278-3366	5	0 / 0	Assigned	
Unassigned	Unassigned Limited Extension	(404) 999-4697		0 / 0	Unassigned	
Unassigned	Unassigned Limited Extension	(850) 268-6341		0 / 0	Unassigned	
Unassigned	Unassigned Limited Extension	(205) 216-6301		0 / 0	Unassigned	
Unassigned	Unassigned Limited Extension	(857) 263-3815		0 / 0	Unassigned	

**Unassigned Limited Extension Details:**

- Existing Phone:** Phone Number: (404) 999-4697, Serial Number: N/A, Expansion Modules: 0
- Extension Info:**
  - Extension Number: 6
  - Extension Name:
  - Emergency Address: Unspecified
  - Extension Email:
  - International Calling: ☐ International Calling allowed

Buttons: Delete, Cancel, Save & Enable

## Editing limited extension info

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Select an existing **Limited Extension** with **Assigned** status.
5. Click **Limited Extension Details**.
6. Edit the following under **General**:

- **Extension Number**
- **Extension Name**
- **Record Extension Name**
- **Company Name**

- **Contact Phone**
- **Email**
- **International Calling allowed**
- **Status**

7. Click **Save**.

8. Edit the following under **Settings**:

- **Regional Settings**
- **Template**
- **Site** (if you have a multi-site account)
- **Confirmation Message**

**1** Phone System

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

Admin Portal AG

**2** Groups

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

**3** Limited Extensions

Groups » **Limited Extensions**

Limited Extension gives admins the ability to purchase an extension with a limited feature set that is not tied to a user. [Learn More](#)

Search [ ] Status [ ] + New Limited Extension [ ]

Status	Name
<b>4</b>	<a href="#">test LE</a>
	<a href="#">Unassigned Limited Extension</a>
	<a href="#">Unassigned Limited Extension</a>
	<a href="#">Unassigned Limited Extension</a>
	<a href="#">Unassigned Limited Extension</a>
	<a href="#">Unassigned Limited Extension</a>

**5** Limited Extension Details

**6** General Settings

Extension Number: 5

Record Extension Name: test LE (Default) [Edit]

Extension Name: test LE

Company Name: [ ]

Contact Phone: [ ]

Email: testLE@test.com

International Calling allowed: ☐ Enable

Status: Not Activated [Send Invite]

[Delete Group] [Cancel] **7** [Save]

**8** Limited Extension Details

General Settings

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

Template: [Apply]

Confirmation Message: 3 seconds [Edit]

Phone & Numbers

Announcement & Hold Music

Outbound Caller ID

## Recording an extension name

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

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

1. Admin Portal

2. Groups

3. Limited Extensions

4. test LE

5. Limited Extension Details

6. Edit

7. Record by

8. Greeting Name

9. Save

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

Admin Portal AG

Company Info >

Phone Numbers >

Auto-Receptionist >

Groups >

Call Queues

Paging Only

Shared Lines

Park Locations

Call Monitoring

Call Pickup

Message-Only Extensions

Announcement-Only Extensions

Limited Extensions

Phones & Devices >

Emergency Calling >

Groups » **Limited Extensions**

Limited Extension gives admins the ability to purchase an extension with a limited feature set that is not tied to a user. [Learn More](#)

Search [ ] Q Status [ ] + New Limited Extension [ ]

Status	Name
test LE	
Unassigned Limited Extension	
Unassigned Limited Extension	
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)

Extension Name test LE

Company Name

Email testLE@test.com

Record Extension Name

Record by RingCentral text-to-speech

Greeting Name

Cancel Save

## Adding a direct number

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Select an existing limited extension.
5. Click **Phones & Numbers**.
6. Click **Add Direct Number**. The **Add Direct Number** window will appear.
7. Select a Location and follow these instructions for the **Number Type** you choose:
  - *Local Number*: Provide the **State** and **Area Code**. Select a **Cost Center** if you have more than one. Otherwise, it will be preselected. Select one or more numbers and click **Add Numbers**.
  - *Toll-Free Number*: Select a toll-free prefix. Note that there is a \$30 one-time set up fee per number if you select 800 as your toll-free prefix. Select a **Cost Center** if you have more than one. Otherwise, it will be preselected. Select one or more numbers and click **Add Numbers**.
  - *Vanity Number*: Select a **Cost Center** if you have more than one. Otherwise, it will be preselected. Enter a number that helps customers remember your business phone number. Click **Search** to check availability. Select a number and click **Add Numbers**.
8. Click **Next**.
9. Follow the prompts to purchase your new number.

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

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

The main content area is titled 'Groups » Limited Extensions'. It includes a search bar, a 'Status' dropdown, and a '+ New Limited Extension' button. Below this is a table of existing extensions:

Status	Name
test LE	test LE
Unassigned Limited Extension	Unassigned Limited Extension
Unassigned Limited Extension	Unassigned Limited Extension
Unassigned Limited Extension	Unassigned Limited Extension
Unassigned Limited Extension	Unassigned Limited Extension
Unassigned Limited Extension	Unassigned Limited Extension

A red circle 4 highlights the 'test LE' row. A red circle 5 highlights the 'Phone & Numbers' section of the 'test LE (Ext. 5)' details panel. This panel includes a 'Limited Extension Details' section and a 'Phone & Numbers' section with a '+ Add Direct Number' button (highlighted with a red circle 6).

The 'Add Direct Number' modal is open, showing a progress bar with three steps: '1 Select Numbers', '2 Confirm Order', and '3 Order Confirmation'. The 'Select Numbers' step is active. It contains dropdowns for 'Location' (Domestic - US/Canada), 'Number Type' (Local Number), and 'Cost Center' (John Smith Company). Below these are 'Number Information' details: 'License: Additional Local Numbers - Domestic', 'Availability: 0', and 'Cost Center: John Smith Company'. A note states: 'If the quantity of numbers exceeds the available amount, you will be charged \$4.99/month each.' There are dropdowns for 'State' and 'Area Code', and an 'Add Numbers' button. At the bottom right, there are 'Cancel' and 'Next' buttons. A red circle 7 highlights the 'Select Numbers' step, and a red circle 8 highlights the 'Next' button.



## Setting an announcement and enabling hold music

Customize a greeting for an announcement-only extension.

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Limited Extensions**.
4. Select an existing limited extension.
5. Click **Announcement & Hold Music** and then click **Edit** under **Unavailable Greeting**. The **Unavailable Greeting** window will appear.
6. Choose your preferred type of announcement under **Set Greeting**:
  - a. *Default*: Select *Default* to use a system-default announcement. Select the language to display the default greeting text under **View In**. Your selection here affects only your current view of the greeting text, it will not change the greetings language setting. Click **Done**.
  - b. *Custom*: Select *Custom* and select how you'd like to set your custom recording:
    - **Phone**: Choose a phone number from the dropdown list if you have saved numbers or select *Enter a new number* and type a phone number in the field for **Call me at**. Click the **Call Now** button, and RingCentral will call you to record your extension name. Click **Done**.
    - **Computer Microphone**: Click **Allow** if RingCentral asks to record through your computer. The **Microphone Test and Record** settings will appear. When ready, click the red **Record** button to record your voicemail greeting. Click the up arrow to upload your recorded message. Click **Done**.
    - **Importing**: Click **Browse** and select the WAV or MP3 file you want to use. Click **Open**. Click **Done**.
7. Ensure there is a check for **Enable** under **Hold Music** if you want callers to hear music whenever you put the call on hold. If hold music is enabled, click **Edit** to set your hold music. The **Hold Music** window will appear.
8. Choose your preferred type of audio under **Set Audio**:
  - a. *Ring Tones*: Select *Ring Tones* if you want your callers to hear ring tones while the call is being connected.
  - b. *Music*: Select *Music* if you want callers to hear music. Select the type of music under **Select Music**.
  - c. *Custom*: Select *Custom* to upload your own audio file. Click **Browse** and select the WAV or MP3 file you want to use. Click **Open**.
9. Click **Done**.
10. Click **Save**.



The screenshot displays the RingCentral Admin Portal interface for configuring Limited Extensions. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Phone System' tab is active, and the 'Admin Portal' dropdown is visible. The left sidebar shows a tree view with 'Groups' expanded, and 'Limited Extensions' selected. The main content area is titled 'Groups » Limited Extensions' and includes a search bar, a status dropdown, and a '+ New Limited Extension' button. A table lists existing limited extensions, with 'test LE' selected. The right panel shows the configuration for 'test LE (Ext. 5)', including 'Limited Extension Details', 'Phone & Numbers', and 'Announcement & Hold Music'. The 'Announcement & Hold Music' section has two sub-sections: 'Unavailable Greeting' and 'Hold Music'. The 'Unavailable Greeting' section shows a default greeting and a duration slider. The 'Hold Music' section shows a checkbox to enable hold music, a music selection dropdown, and a duration slider. Three modal windows are overlaid on the main content: 1. 'Unavailable Greeting' (callout 6) showing a dropdown for 'Set Greeting' with 'Default' selected, a language dropdown set to 'English (U.S.)', and a text area with the default greeting. 2. 'Announcement & Hold Music' (callout 7) showing the 'Unavailable Greeting' and 'Hold Music' settings for the selected extension. 3. 'Hold Music' (callout 8) showing a dropdown for 'Set Audio' with 'Music' selected, a 'Select Music' dropdown with 'Acoustic' selected, and a duration slider. Callouts 1 through 10 are placed throughout the interface to highlight specific elements: 1. Phone System tab, 2. Groups menu item, 3. Limited Extensions menu item, 4. test LE link in the table, 5. Announcement & Hold Music section header, 6. Unavailable Greeting modal, 7. Hold Music checkbox, 8. Hold Music modal, 9. Set Music dropdown, 10. Save button.

1. Phone System

2. Groups

3. Limited Extensions

4. test LE

5. Announcement & Hold Music

6. Unavailable Greeting

7. Hold Music

8. Hold Music

9. Set Music

10. Save

## 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**.

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

Admin Portal AG

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

3 Groups > Limited Extensions

4 test LE

5 Outbound Caller ID

6 Edit

8 Edit

10 ☒ Display my extension number for internal calls.

7 Select Number

Select a phone number you want to display as your Caller ID number for Existing Phone.

Select	Number	Name	Type
<input type="radio"/>	Blocked		Others
<input type="radio"/>	+64 (3) 5680495		Company Number
<input type="radio"/>	+61 (2) 90531098		Company Number
<input type="radio"/>	+44 (20) 38808134		Company Number
<input type="radio"/>	(888) 219-5286	Front desk	Company Number
<input type="radio"/>	(888) 971-5468		Company Number
<input checked="" type="radio"/>	(857) 203-7722		Main Company Number
<input type="radio"/>	(855) 458-4457		Company Number
<input type="radio"/>	(844) 884-2263		Company Number

9 Select Number

Select a phone number you want to display as your Caller ID number for Alternate Caller ID.

Select	Number	Name	Type
<input checked="" type="radio"/>	Not-specified		Others
<input type="radio"/>	+64 (3) 5680495		Company Number
<input type="radio"/>	+61 (2) 90531098		Company Number
<input type="radio"/>	+44 (20) 38808134		Company Number
<input type="radio"/>	(857) 203-7722		Main Company Number
<input type="radio"/>	(475) 400-0618		Company Number
<input type="radio"/>	(250) 278-3366		Direct Number
<input type="radio"/>	(251) 328-4799		Company Number
<input type="radio"/>	(213) 291-2609		Company Number
<input type="radio"/>	(205) 419-8274		Company Number

Total: 10 Show: 25 < 1 > Cancel Done

## Phones and Devices

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

Phones & Devices » User Phones

Search User Phones  [More](#) [+ Add Device](#)

Stat...	Device	Site	Assigned	Phone Number	Serial No.	Actions
	<a href="#">Existing Phone</a>	Company	Hank Hillos	(409) 200-2364	N/A	<a href="#">⋮</a>
	<a href="#">Joe Hall RingCentral Phone desktop app</a>	Company	Joe Hall	(409) 209-0429	N/A	

## Searching devices

You can search or filter the phones or devices by specifying search text, status, or device, and selecting the search icon. The search displays results for devices meeting the search criteria in the device category.

## Adding a device

You can add a phone or device by clicking Add Device in the upper right. See the next pages for more detailed instructions.

## Adding a user phone

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **User Phones**.
4. Click **Add Device**.
5. Select a **Location**.
  - Domestic
  - International
6. Click **Next**.
7. Select a user to assign the phone to.
8. Select a device to buy.

**Note:** You can only add devices for one country at a time. Repeat the process for different countries as needed.

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

Company Info  
Phone Numbers  
Auto-Receptionist  
Groups  
**Phones & Devices**  
User Phones  
Common Area Phones  
Playing Devices  
Shared Lines  
Unassigned  
Emergency Calling

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

**Add User Phones**

✓ Select Location 2 Select User 3 Select Devices 4 Select Numbers 5 Add Emergency Address 6 Add Shipping Info 7 Confirm

Search Department: All Sites

Select	Name	Site	Ext.	Department
<input checked="" type="radio"/>	Hank Hillis	Company	11101	
<input type="radio"/>	Joe Hall	Company	11102	

Total: 2 < 1 > Back Next

**Add User Phones**

✓ Select Location ✓ Select User **3 Select Devices** 4 Select Numbers 5 Add Emergency Address 6 Add Shipping Info 7 Confirm

**Select Devices**

Recently Bought Desktop Phones Other Phones

**Avaya IX IP Phone J139**  
Price: \$114.00  
Available in your site:  
New - 0

Avaya IX IP Phone J139

A 2.8 inch diagonal color display IP phone with speakerphone, presence, Gigabit Ethernet and more. Includes power adapter.

- 2.8" diagonal color display
- Simplifies call control on the display using softkeys for everyday functions
- Share a single network connection with your phone and PC using the integrated Gigabit 2-port Ethernet switch
- Integrated Power over Ethernet (PoE) support (Class 1)

[Download Datasheet](#)

**Additional Purchase**  
\$114.00

0 + Add

**Devices Added: 1 Device (max 50)**

Qty	Device Name	Device Option
1	Avaya IX IP Phone J139	New

Avaya IX IP Phone J139

Qty 1

Selected from account 0

Sub-total \$114.00

**Order Summary**

One-time Charges	Qty	Subtotal*
Phones	1	\$114.00

Recurring Charges - annual	Qty	Subtotal*
DigitalLine Unlimited	1 x \$419.88	\$419.88

**Today's Estimated Total\*** \$533.88

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

Back Next





## Adding a common area phone

A common area or hot desk phone provides hot desking, and enables any employee to log in to a shared phone that adopts the user's phone settings

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Common Area Phones**.
4. Click **Add Device**.
5. On the **Add Hot Desk Phones** window, enter the quantity and select a device. Click **Add**, and then **Next**.
6. Add an emergency address. Click **Next**.
7. Select your shipping preferences and click **Next**.
8. Confirm your order by checking the acknowledgment box. Click **Next**.

The screenshots illustrate the process of adding a common area phone through the RingCentral Admin Portal. The steps are as follows:

- Step 1:** The Admin Portal home page with the **Phone System** tab selected.
- Step 2:** The **Phones & Devices** section in the left sidebar is selected.
- Step 3:** The **Common Area Phones** sub-section is selected.
- Step 4:** The **Add Device** button is clicked.
- Step 5:** The **Add Hot Desk Phones** window is shown. The quantity is set to 1, and the device is selected as 'Anyxa IX IP Phone J138'. The **Add** button is clicked.
- Step 6:** The **Add Hot Desk Phones** window shows the **Add Emergency Address** step. The address '138 Lax Gates Road, Arlen, TX, 78104, United States' is entered, and the **Next** button is clicked.
- Step 7:** The **Add Hot Desk Phones** window shows the **Add Shipping Info** step. The shipping method is set to 'Ground', and the **Next** button is clicked.
- Step 8:** The **Add Hot Desk Phones** window shows the **Confirm** step. The order summary is displayed, including the device, quantity, and total price. The **Next** button is clicked.

The final screenshot shows the **Order Summary** for the 'Add Hot Desk Phones' order. It includes a table of charges and credits, a table of taxes, and a total amount of \$177.49.

Period	Charges and credits	Unit Price	Quantity	Amount	
03/09/2020 - 03/07/2021	Common Phone (new purchase)	\$0.00	1	\$0.00	
	(One time charge)	Anyxa IX IP Phone J138	\$114.00	1	\$114.00
	(One time charge)	Shipping & Handling Fee: US - Ground	\$13.20	1	\$13.20
	<b>Charges after Discounts and Promotes:</b>			\$127.20	
	<b>Taxes</b>				
	State and local taxes and fees			\$11.34	
	Compliance and Administrative Cost Recovery Fee			\$48.00	
	Compliance and Administrative Cost Recovery Fee - Private Adjustment			(\$51.98)	
	e911 Service Fee			\$10.00	
	e911 Service Fee - Private Adjustment			(\$6.25)	
	PULSE (P&P)			\$4.58	
	<b>Taxes after Discounts and Promotes:</b>			\$50.29	
	<b>Total charges after discounts and promotes:</b>			\$127.20	
	<b>Total Taxes and Fees:</b>			\$50.29	
	<b>Sub-total:</b>			\$177.49	
	<b>Total Charged to Credit Card:</b>			\$177.49	

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

I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of \$177.49 to be charged to my credit card ending in \*\*\*\*1111.

## Adding a paging device

A paging device is a wall-mounted speaker or amplifier that enables overhead paging. Follow the steps below to add a paging device:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Paging Devices**.
4. Click **Add Device**.
5. Enter a name for the paging device.
6. Click **Next**.
7. View the provisioning information for the device.
8. Click **Done** to add the paging device to your system.

The screenshot illustrates the 'Add Paging Device' workflow in the RingCentral Admin Portal. The process is guided by numbered callouts 1 through 8.

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

**Step 2:** The 'Phones & Devices' option is selected in the left sidebar.

**Step 3:** The 'Paging Devices' option is selected in the left sidebar.

**Step 4:** The '+ Add Device' button is clicked in the 'Paging Devices' section.

**Step 5:** The 'Add Paging Device' modal is shown, with the 'Device Nickname' field populated with 'Paging Device 1'.

**Step 6:** The 'Next' button is clicked in the modal.

**Step 7:** The 'Provisioning Info' tab is selected in the modal, showing the provisioning information for CyberData paging devices.

**Step 8:** The 'Done' button is clicked at the bottom right of the modal.

**Provisioning information for CyberData paging devices:**

CyberData paging devices need to be programmed with the information given below to make them fully functional when assigned to paging group.

**Step 1**  
Open a web browser session to the CyberData device. Please consult the vendor documentation for details on how to determine the IP address of your device and how to enter the relevant login credentials.

**Step 2**  
Navigate to the Networking page and confirm that the device is configured for DHCP operation.

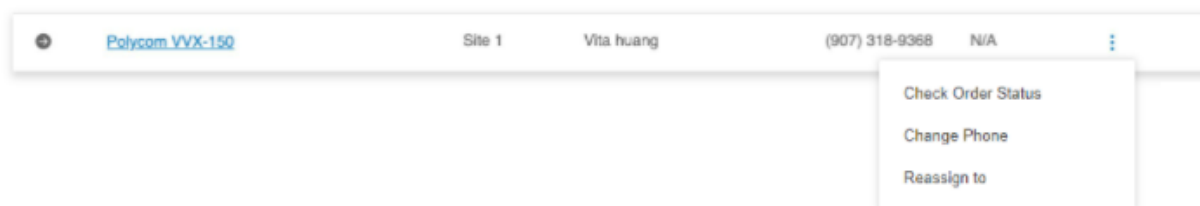
**Step 3**  
Navigate to the SIP Configuration page and enter the following settings in the appropriate fields and Click "Save". The device may reboot.

Field	Value
SIP Domain	sip.ringcentral.com
Remote SIP port	5060
Local SIP port	5060
Outbound Proxy	sip10.ringcentral.com
Outbound Proxy Port	5090
User Name	14092402563*803932523012
Authorization ID	803932523012
Password	pt6Ez

## Changing a phone

To change the phone of a user:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Locate the phone that you want to replace.
4. Click **Change Phone** from the more menu.



5. Select from the following options:
  - a. *Order a new phone from RingCentral:* We will ship you a new desktop IP desk phone if you select this option. These phones are pre-configured and should be automatically provisioned once connected to the internet.
  - b. *Existing RingCentral phone:* Select this option if you already have a desktop IP phone purchased from RingCentral but not currently in use. You can also swap phones with another user. A reboot is needed if you exchange phones with another user. Provisioning is required if you select a phone not presently in use. For more information, visit [Intro to deskphones provisioning](#).
  - c. *Phone not purchased from RingCentral:* Select this option if you own a SIP phone not purchased from RingCentral. Provisioning is required after assigning these phones to a user. For more information, visit [Intro to deskphones provisioning](#).
  - d. *RingCentral Phone app:* Select this option if you prefer to use RingCentral's desktop application for taking your calls. You can download the RingCentral app from the [RingCentral Downloads page](#).

## Reassigning a phone

To reassign a phone to another user:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Locate the phone that you want to replace.
4. Click **Reassign to** from the more menu.
5. Select the user where you want to reassign the phone, then click **Next**.
6. You will be prompted with a warning message, click **Yes** to proceed.

## Viewing shared lines

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Shared Lines**. The group assigned to a particular **Shared Line** and the **Phones Assigned** to that shared line are listed.
4. Filter numbers by search term or device.
5. The **Shared Line** and **Phones Assigned** are shown here. If you have made any changes, click **Apply**.

Phones & Devices » **Shared Lines**

Search Shared Lines  [More](#)

Shared Line	Phones Assigned	Site	Lines	Ext.
<a href="#">Group 1</a>	Avaya IX IP Phone J139	Company	1	11006

## Adding an unassigned phone

An unassigned phone is an IP phone in your account that is not yet activated or assigned to a user. Use the following steps:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Unassigned**.
4. Click **Add Device**.
5. Select a **Location**.
  - a. Domestic
  - b. International
6. Click **Next**.
7. Select a device.
8. Click **Next**.

The screenshot illustrates the 'Buy Unassigned Phone' process in the RingCentral Admin Portal. The interface is divided into a top navigation bar, a left sidebar, and a main content area. The 'Buy Unassigned Phone' modal is open, showing the steps to purchase a new device.

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

**Step 2:** The 'Phones & Devices' menu item is selected in the left sidebar.

**Step 3:** The 'Unassigned' sub-menu item is selected in the left sidebar.

**Step 4:** The '+ Add Device' button is clicked in the 'Unassigned' section.

**Step 5:** The 'Buy Unassigned Phone' modal is open, showing the 'Select Location' step. The 'Domestic' radio button is selected.

**Step 6:** The 'Next' button is clicked at the bottom right of the modal.

**Step 7:** The 'Buy Unassigned Phone' modal is open, showing the 'Select Devices' step. The 'Avaya IX IP Phone J139' is selected, and the 'Add' button is clicked.

**Step 8:** The 'Buy Unassigned Phone' modal is open, showing the 'Order Summary' step. The 'Next' button is clicked at the bottom right of the modal.

**Order Summary:**

One-time Charges	Qty	Subtotal*
Phones	1	\$114.00

**Today's Estimated Total\*** \$114.00

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

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

Buy Unassigned Phone

✓ Select Location ✓ Select Devices **9** Sites 4 Add Shipping Info 5 Confirm

Select Site  
Company Assign to Selected

Assign Site to Items (0)

Product Name	Site	Qty	Actions
All items have Sites assigned			

Assigned Sites (1)

Product Name	Site	Qty	Actions
Avaya IX IP Phone J139 New - United States	Company	1	Unassign

Back Next

Buy Unassigned Phone

✓ Select Location ✓ Select Devices ✓ Sites **10** 4 Add Shipping Info 5 Confirm

Auto-assign the shipping address based on Site address. Attention to and Ground Shipping will be the default. Auto Assign

Select Shipping Address  
20 Davis Dr, Belmont, CA, 94002-3002, United States Edit New

Attention to  
Something New

Select Shipping Method  
Ground Assign to Selected

Add Shipping Info to Items (0)

Product Name	Qty	Actions
All items have shipping info added.		

Shipping Groups

Add Shipping Info	Attention to	Shipping Method	Device Qty	Actions
20 Davis Dr, Belmont, CA, 94002-3002, United States	Something New	Ground	1	Remove

Back Next

Buy Unassigned Phone

✓ Select Location ✓ Select Devices ✓ Sites ✓ Add Shipping Info **11** 5 Confirm

Period	Charges and credits	Unit Price	Quantity	Amount
(One time charge)	Avaya IX IP Phone J139	\$114.00	1	\$114.00
(One time charge)	Shipping & Handling Fees: US - Ground	\$13.20	1	\$13.20
Charges after Discounts and Prorates:				\$127.20
Taxes				Amount
> State and local taxes and fees				\$11.12
Taxes after Discounts and Prorates:				\$11.12
Total charges after discounts and prorates:				\$127.20
Total Taxes and Fees:				\$11.12
Sub-total:				\$138.32
Total Charged to Credit Card:				\$138.32

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

☒ I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of \$138.32 to be charged to my credit card ending in ["1111"].

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## 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.



## Common area phones

Hot desking or common area phone enables any employee to log in to a hot desk phone that adopts the user's phone settings. Employees who travel from different offices can share the same hot desk phone and desk while keeping their own extension profiles and voicemail access.

### Types of hot desk phones

The following configurations of hot desk phones that support access to hot desking are available to support your business needs:

- **Hot desk (common) phone:** An employee visiting from a different office can log in to a hot desk phone and use it as their own, accessing their own extensions, profiles, voicemail, and other phone features. Hot desk phones do not provide any telephony support unless the guest user activates them by entering their credentials (except for making emergency calls).
- **Hot desking for limited extension:** Limited extensions are installed in common areas (meeting rooms or in hotel rooms) for anyone who has the need to access basic inbound/outbound calling capabilities. With Hot Desking for Limited Extension, a visiting employee can log in to a limited extension phone and use it as their own with access to full telephony features. Hot desking enables field sales and remote employees to work in a variety of spaces when visiting different offices and the fact that this feature is available on limited extension phones ensures that the hardware still provides functional value for on-site employees in all other cases.

### Phone support and setup

You can either purchase a new phone that supports Hot Desking, or convert an existing unassigned Polycom VVX phone to a hot desk phone. Supported phone models are the Polycom VVX 310, 311, 410, 411, 500, 501, and 601.

### Using hot desking for limited extension

Calls are routed to a Hot Desking for Limited Extension phone as follows:

- **Calls to the Guest User:** the limited extension device is added to the forwarding rules of User Business Hours and After Hours (if it has forwarding rule). Calls are routed to a Limited Extension device based on the active answering rule of the guest user.
- **Calls to Limited Extension** are still routed to its device: Extension, DID, or DL number, and paging calls. However, calls to the phone number of the Limited Extension DL follow the guest answering rules.

After logging out through the logout soft key on the physical phone device, the phone resumes operation as a limited extension device.

**Note:** This option is available for 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.

## Unassigning a hot desk phone

You can unassign a hot desk phone to remove it from hot desking use, and return it to the list of unassigned devices. To unassign a hot desk phone:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Common Area Phones**.
4. Select a hot desk phone.
5. Under Phone Details, select **Unassign Phone** The phone is returned to Unassigned phones.

## Logging out a hot desk phone

You can log out the currently logged in user from the hot desk phone. To log out a hot desk phone:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Common Area Phones**.
4. Select one or more hot desk phones.
5. Click **Logout**.

The currently logged in users are logged out from the selected phones.

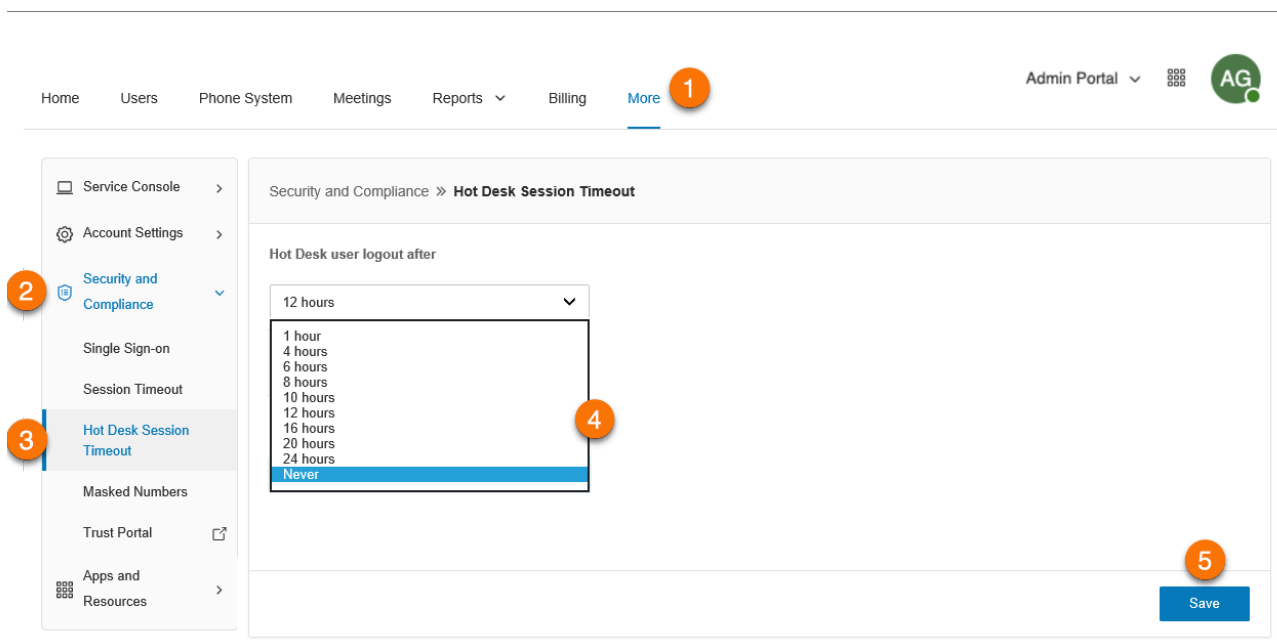
## Setting the hot desking session timeout

The hot desking session timeout specifies the time period when guest users will be logged out from phone endpoints. The default session timeout is 12 hours.

Certain enterprises with a mobile workforce may use the 'Never' value for the timeout to configure that all hot desk sessions in the account will not timeout. When using this option, the hot desk session can only be logged out by a user from the phone.

To set session timeout for all hot desk phones on the system:

1. Click the **More** tab from the **Admin Portal**.
2. Select **Security and Compliance**.
3. Select **Hot Desk Session Timeout**.
4. Select the duration from the list provided. To configure no timeouts, select the **Never** value.
5. Click **Save**.



## Assisted provisioning

You can provision supported third-party devices with your service. Follow these steps:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **User Phones**.
4. Select the device that needs to be provisioned.
5. Click **Setup and Provision**.
6. Select your phone model. If you have selected:
  - **Avaya IP Phone:** Select the phone model, provide the phone's MAC Address and click **Next**. Proceed with the steps described in the wizard.
  - **Cisco/Linksys IP Devices:** Select the phone model from the menu. Provide the phone's IP address and click **Next**. Proceed with the steps described in the wizard.
  - **Polycom IP Phones:** Select the phone model from the menu. Provide the phone's MAC address and click **Next**. Proceed with the steps described in the wizard.
  - **Yealink IP Phone:** Select the phone model from the menu. Provide the phone's MAC address and click **Next**. Proceed with the steps described in the wizard.
  - **Other Phones:** Click **Select**. The next window displays the SIP Configuration or information needed for manual provisioning. Contact your manufacturer to know how to configure your phone using these configurations.

Setup & Provisioning

1 Select Device

2 Provisioning

3 Finish

In addition to the devices RingCentral sells pre-provisioned, RingCentral supports assisted provisioning for additional models. If your model is not available via assisted provisioning, RingCentral may have documented how to manually configure it. Please see the [office devices](#) page for more information.

Select your phone model to begin:


Avaya IP Phones

Cisco / Linksys IP Devices

Polycom IP Phones


Yealink IP Phones

Other Phones




Avaya B199

Select




Avaya J139

Select




Avaya J159

Select



Avaya J169

Select



Avaya J179

Select

Cancel

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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.

## Automatic location updates for RingCentral app for desktop

The location detection for the RingCentral app for desktop is based on the app's interaction with network infrastructure elements with known locations, such as [WiFi access points](#) and/or [IP address ranges](#).

The RingCentral app for desktop dynamically detects and reports changes in WiFi BSSID or IP address. It looks up the location and then updates the emergency location for the app.

Note that only the desktop version of the RingCentral app supports Nomadic 911. The web version doesn't support it.

## Automatic location updates for compatible desk phones

### Prerequisites:

- Polycom VVX x50 Desk Phone/s (VVX 150, 250, 350, or 450)
- Hardwired ethernet connection (WiFi connected Desk Phones are not supported)
- Managed ethernet switch/es (LLDP enabled)

RingCentral account admin defines a network map in the Admin Portal to specify on-net locations by IP Address ranges with corresponding physical address/es or Chassis IDs of ethernet switches with corresponding physical address/es. If location lookup is successful, the emergency address is automatically updated upon restart.

**Note:** If location lookup is unsuccessful, the phone is deemed as Off-Net and a notification is sent to the admin allowing them to deal with the situation. Phones in Off-Net status will enter a restricted calling state: No PSTN calling, only calls within account.

Before enabling the Automatic Location Updates, you must add your [ethernet switches to the Switch Map](#) or [add your IP addresses to the IP Address Range Map](#).

### Enabling automatic location updates of compatible desk phones

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Status > Automatic Location Updates for Compatible Desk Phones**.
3. Turn on the toggle switch for **Enable Automatic Location Updates for Compatible Desk Phones**.
4. Tick the checkbox for **Accept legal disclaimers**, then click **Confirm**.

## Setting up the network infrastructure with known locations

Location detection is based on the application or device's interaction with network infrastructure elements with known locations, such as [WiFi access points](#), [IP address ranges](#), and/or [Ethernet switch MAC addresses](#).

### Adding wireless access point to the wireless access point map

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Wireless Access Point Map**.
3. Click **+ Access Point**.
4. Enter the **BSSID** (Mac address of the wireless access point) and **Nickname** of the Wireless Access Point.  
Note: BSSID is not the same as the SSID of the access point.
5. Select an **Emergency Response Location**, then click **Save**.

### Adding an IP address range to the IP address range map

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **IP Address Range Map**.
3. Click **+ Add Network**.
4. Enter the **Network Name** and select the **Site** (for multi-site accounts).
5. Click **+ Add** in the **Public IP Address(es)** section.
6. Select **Single** or **Range**, then enter the IP address or IP address range, and then click **Save**.
7. Click **+ Add** in the **Private IP Addresses** section.
8. Select **Single** or **Range**, then enter the IP address or IP address range.
9. Enter a **Nickname** and select an **Emergency Response Location**, then click **Save**.
10. Click **Save**.

**Note:** IP address ranges need to be specified as the combination of public IP address and all private IP ranges. For example: your devices are in the following private network range : 192.169.10.0 - 192.168.10.255. You also have two IP addresses from your Internet Service Provider. To define this network you would add the network, add two single IP addresses as public IP addresses as well as one private IP address range using the steps described above.

### Adding an ethernet switch to switch map

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Switch Map**.
3. Click **+ Add Switch**.



4. Enter the **Chassis ID** and **Nickname** of the ethernet switch. In many cases, the Chassis ID will be the MAC address of the switch.
5. Select an **Emergency Response Location**, then click **Save**.

## Selecting a User extension to be treated as nomadic

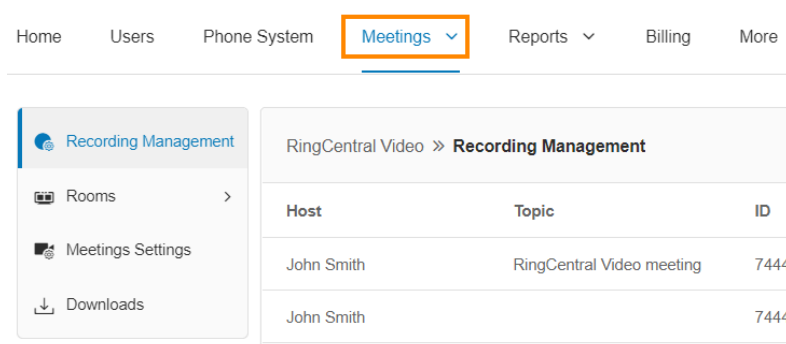
After enabling the Automatic Location Updates, you can select a User Extension to be treated as nomadic.

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Extensions**.
3. Select the User extension to be treated as nomadic by clicking **Activate** at the top of the **Status** column. To remove a User Extension, select the extension, then click **Deactivate** at the top of the **Name** column.

## Meetings

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

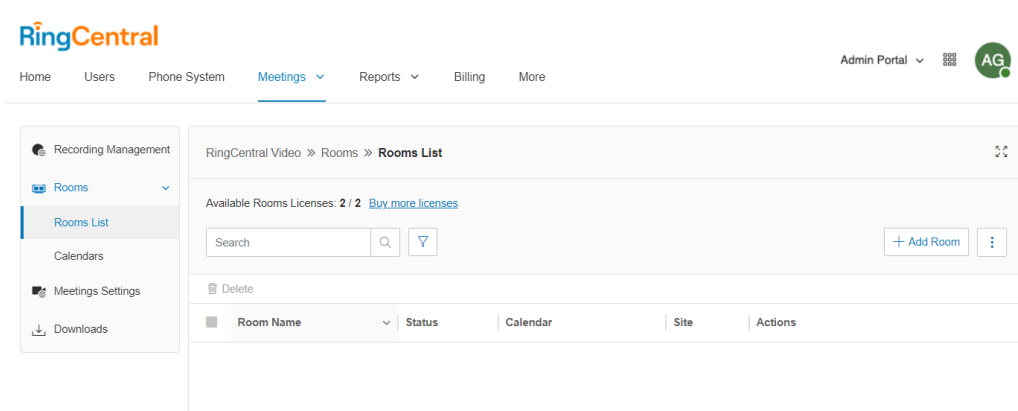
- Recording Management
- Rooms
- Meetings Settings
- Downloads



### Accessing and managing Rooms

When you have purchased a RingCentral Rooms License and set up the hardware for your RingCentral Rooms system, you can access and manage it on your online account.

1. Click the **Meetings** tab from the **Admin Portal**.
2. Click **Rooms**. You can view the following tabs:
  - **Rooms List:** This menu lets you view the list of all Devices and Rooms in the account. It also allows you to modify the Global Settings, add or edit Locations and Rooms, upgrade all Devices, and export rooms.
  - **Calendars:** This tab allows you to add Calendar Services (Google Calendar, Office 365, Exchange) that can be integrated with RingCentral Rooms. It also lets you authorize or deauthorize, sync, and delete calendars.



## Managing Meetings settings

RingCentral Video allows admins and users to conveniently control the features with a user-friendly settings interface that is available on the RingCentral online account. Account admins have the capability to enable and disable RingCentral Video features that will be applied for all RingCentral Video users on the account.

1. Click the **Meetings** tab from the **Admin Portal**.
2. Click **Meetings Settings**.
3. Admins can enable and disable RingCentral Video features on their account. The following sections are available:
  - a. **Security**
  - b. **Basic**
  - c. **Recordings**
  - d. **Email Notifications**

The screenshot displays the RingCentral Admin Portal interface for the Meetings Settings page. The top navigation bar includes links for Home, Users, Phone System, Meetings (selected), Reports, Billing, and More. The left sidebar contains a menu with Recording Management, Rooms, Rooms List, Calendars, Meetings Settings (highlighted), and Downloads. The main content area is organized into four distinct sections, each with a title and a list of settings:

- Security** (indicated by a lock icon):
  - Enable meeting password for scheduled meetings: ☒ (locked)
  - Allow only authenticated users to join meetings: ☐ (locked)
  - Require participants to enter a waiting room before joining the meeting: ☐ (locked)
  - Participants can only join after the host: ☒ (locked)
  - Restrict screen sharing to hosts & moderators: ☐ (locked)
- Basic**:
  - Play sound when participants join or leave: ☐ (locked)
- Recordings**:
  - Allow meetings to be recorded: ☒
- Email Notifications**:
  - Send email notification when meeting recording is ready: ☒ (locked)
  - Send email notification when meeting recording is deleted: ☒
  - Send email notification when meeting recording is shared: ☒
  - Send email notification when meeting has ended: ☐

## Call log reports

The Call Log reports on inbound and outbound calls and faxes for the company number and specified extensions. The Call Log is available as a **Simple** view, which concisely summarizes the calls, and as a **Detailed** view, which shows additional call record details.

You can filter the call log records by number, time period, call direction or type of call (inbound or outbound). Select your filter criteria, and click **Apply** to refresh the log. In **Delivery Settings**, you can set delivery of the call log to an email address on a daily, weekly, or monthly basis, on a specified day.

In the **Type** column you can see the types of calls. In the **Recording** column, you will see an icon if the call has been recorded. Click the play icon to hear a recording.

To access the call log:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Call Log**.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Reports' tab is selected, and a dropdown menu is open, showing 'Call Log' as the first option. Below the navigation bar, the 'Call Log' report is displayed in 'Simple' view. It includes a search bar, a date range selector set to 'Last 7 days', and buttons for 'Reset', 'Apply', 'Download', and 'Delivery Settings'. The main content area is a table with columns: Type, Phone Number, Name, Date / Time, Recording, Action, Result, and Length. Two call records are shown, both marked as 'Missed'.

Type	Phone Number	Name	Date / Time	Recording	Action	Result	Length
☐	From: (310) 555-1212	WIRELESS CA...	08/03/2020 3:58 PM	-	Phone Call	Missed	0:00:27
☐	From: (310) 555-1212	WILLIAM HUB...	08/03/2020 11:14 AM	-	Phone Call	Missed	0:00:18

## Downloading call log and recorded calls

You can download the Call Log in .csv format and the recorded calls in mp3 format from the Call Log page. The downloaded file will only contain the details of the filter you have selected.

Downloading the Call Log and recorded calls may take some time and may possibly time out. The Background Call Log feature makes it possible to avoid your downloads from timing out and lets you work in the background or switch to another page on your RingCentral Online account. Contact Support or your Account Manager to have the Background Call Log feature enabled.

To download your call log and recorded calls:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Call log**.
3. Click the Type of View: **Simple** or **Detailed**.
4. Filter the information that you wish to include in the Call Log Report.
5. Click **More** to select other information filters.
6. Click **Apply**.
7. Click **Download**.
8. **Call Log (csv)** is selected by default. Select what needs to be downloaded: **Call Log** or **Recorded Calls** or **both**. If you select **Recorded Calls (mp3)**, all call recordings will be downloaded. Click **Download** to save the file on your computer.

**Note:** If the Background Call Log feature is disabled, you will not be able to exit from the current window until the download gets completed. If the Backlog Call Log feature is enabled, a pop-up window will advise that your download has started and may take a while depending on the size of the file and internet connection. Click **OK** to close it.

The screenshot shows the RingCentral Admin Portal interface for the Meetings section. The top navigation bar includes Home, Users, Phone System, Meetings, Reports (highlighted with callout 1), Billing, and More. The Reports dropdown menu is open, showing Call Log (callout 2), Meetings Reports, and Analytics. The main content area has tabs for Simple and Detailed views. Below the tabs are filters: Search Numbers (callout 4), Last 7 days, Call Direction, Types of Call, All, and Select Ext. There are buttons for Reset and Apply (callout 6). A table displays call logs with columns: Type, Phone Number, Name, Date / Time, and Recording. A sample row shows a call from (971) 339-4299 to PORTLAND OR on 08/05/2020 at 12:58 PM. A Download button (callout 7) is in the top right. A modal titled 'Download Call Log' (callout 8) is open, showing options to download the Call Log (csv) or Recorded Calls (mp3). The modal text states: 'Only the current filtered view of the call log will be downloaded.' and 'Download:'. The modal has Cancel and Download buttons.

1

2

3

4

5

6

7

8

Home Users Phone System Meetings Reports Billing More

Admin Portal AG

Simple Detailed

Search Numbers Last 7 days More

Call Direction Types of Call All Select Ext

Reset Apply

Delete Block

Type	Phone Number	Name	Date / Time	Recording
	From: (971) 339-4299	PORTLAND OR	08/05/2020 12:58 PM	-

Download Call Log

Only the current filtered view of the call log will be downloaded.

Download:

☒ Call Log (csv)

☐ Recorded Calls (mp3)

Cancel Download

## Analytics

The Analytics Portal lets you access reports such as Adoption & Usage, Performance, Company Numbers, Device Status, Live Reports, Meetings Dashboard, and Quality of Service. It also lets you view existing Historical Reports under the Subscriptions tab.

To access the Analytics Portal:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. If it is your first time logging in, you will be asked to authorize the Analytics Portal to sign in with your RingCentral credentials. Click **Authorize**.
4. The Analytics Portal contains the follow tabs:
  - Adoption & Usage
  - Company Numbers
  - Meetings Dashboard
  - Performance Reports
  - Quality of Service
  - Rooms & Devices
  - Alerts
  - Subscriptions

## Adoptions and usage

Adoption & Usage (A&U) Analytics gives visibility into usage and adoption patterns of the RingCentral products across your organization. You can gain intelligent insights on the following:

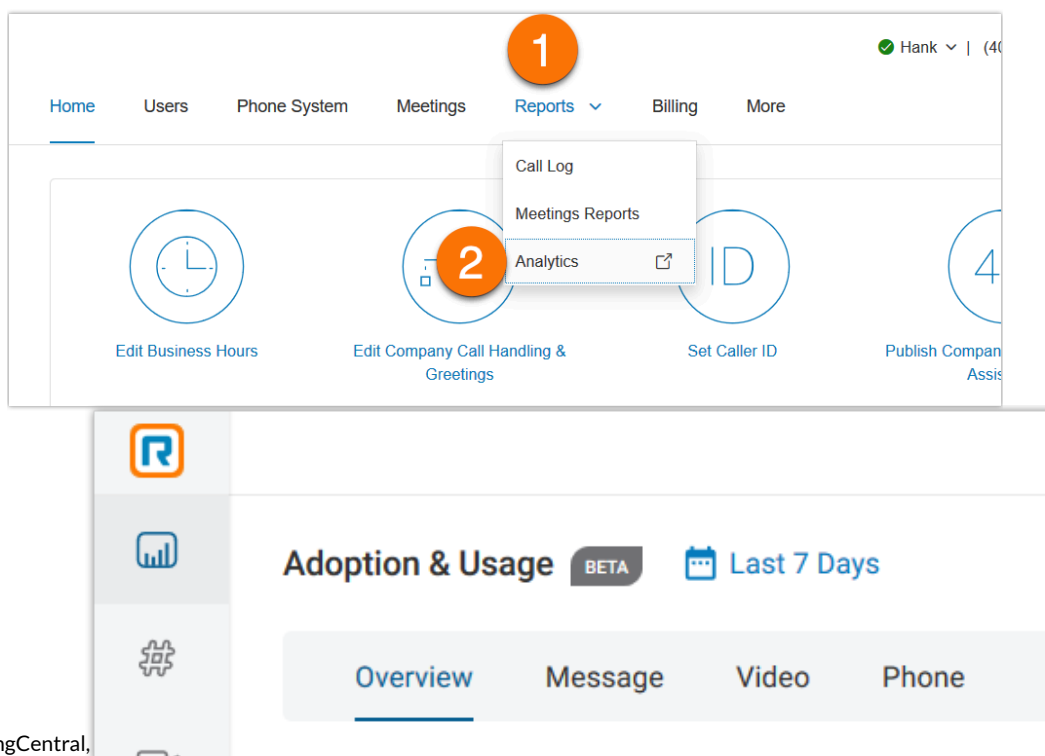
- if, and how, RingCentral products are being used (at the organizational level or across sites and departments)
- determining the power users
- trends and patterns of usage
- who are the low users/non-users
- which locations/departments could benefit from a training session
- user preferences such as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

To access:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics** to open the Analytics portal on another page.
3. The **Adoption & Usage** tab is the landing page of the Analytics Portal.

From the Adoption & Usage tab, you can select to view the following tabs:

- **Overview:** Dashboard showing all Message, Video, and Phone metrics
- **Message:** RingCentral app
- **Video:** RingCentral Video analytics
- **Phone:** RingCentral Telephony/PBX





## Company numbers reports

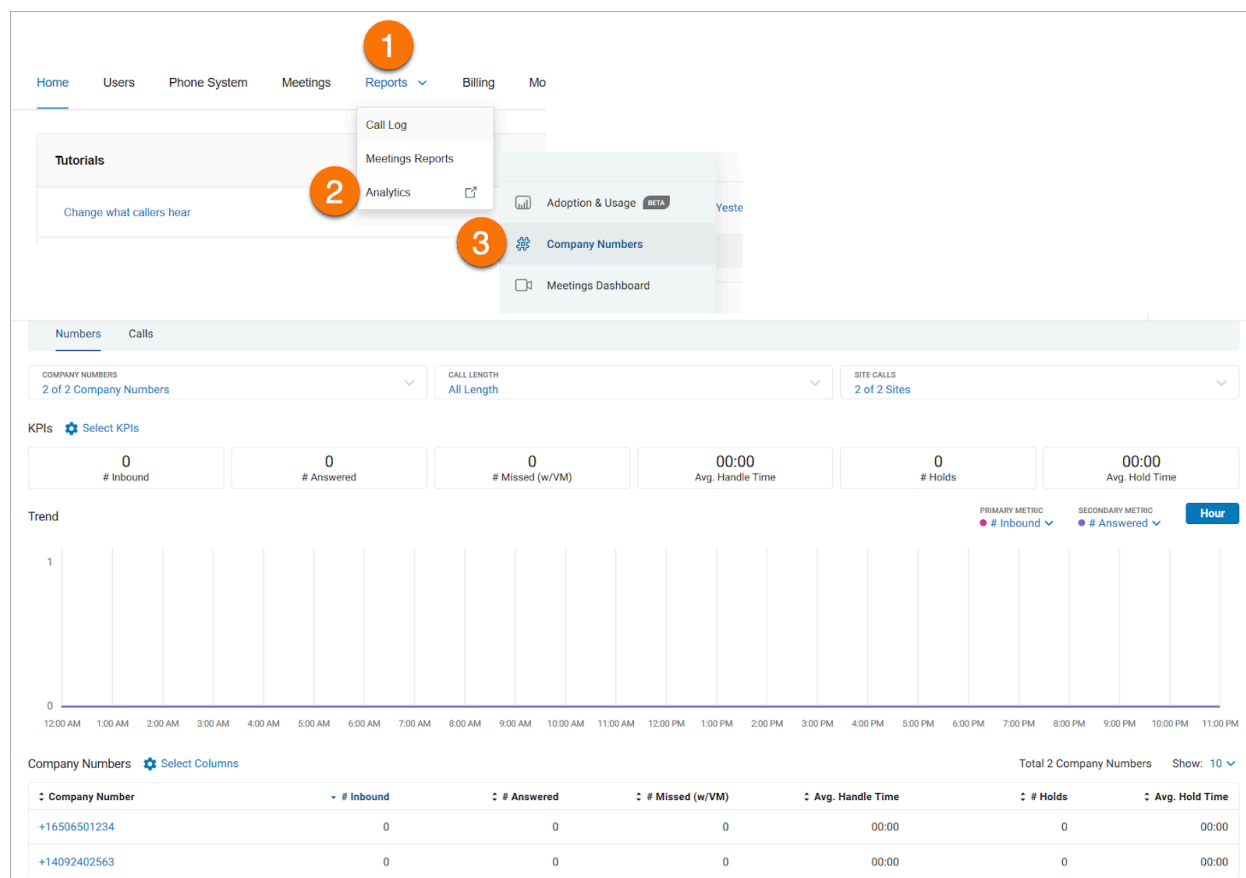
The Analytics Portal can generate a report using Company Numbers. There are also a number of Key Performance Indicators (KPIs) available for this report.

Company Numbers KPIs include the following:

- The number or percentage of all inbound calls answered on a company number
- The number or percentage of all calls to a company number in which a Voicemail was left
- The number or percentage of all calls that were missed (includes voicemail)
- The total amount of handle time the user spent on the calls on a company number. Handle time is all live talk time and all hold time
- The average duration of a company number call, from answered until terminated. This includes live talking plus time on hold
- The number of calls placed on hold for the numbers selected, the average hold time, or the number of abandoned calls put on hold
- The number of calls transferred, parked (or answered from park), total park time and the number of calls abandoned while the caller was put on park

To access Company Numbers:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click the **Company Numbers** tab.



## Performance reports

The RingCentral Performance Reports tab is an additional tool that enables you to research call records to determine your business unit performance. By using Key Performance Indicators (KPI) as well as targeted filters, Performance Reports assists you in combining user, queue, and call activity to evaluate performance.

Performance Reports offer the following features and benefits:

- Dozens of available KPIs for a deeper understanding of performance
- New modern interface, with extremely fast performance
- Targeted filters available for all reports providing better investigation
- Highly customizable reports to individualize reporting experience
- Enhanced capabilities to better match customer behaviors

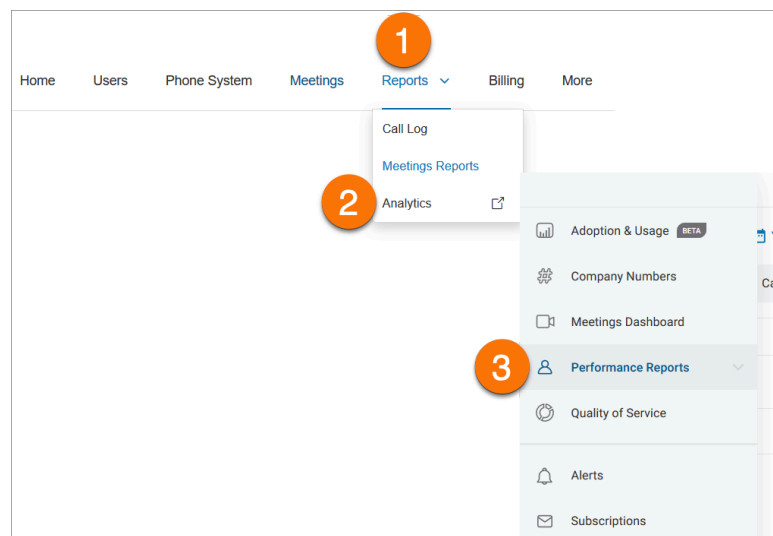
The Performance Reports page contains the follow tabs:

- **Queues:** Call queue performance for the call segment that is relevant to each queue

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

To access Performance Reports:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics Portal**.
3. Click **Performance Reports**.



## Quality of Service reports

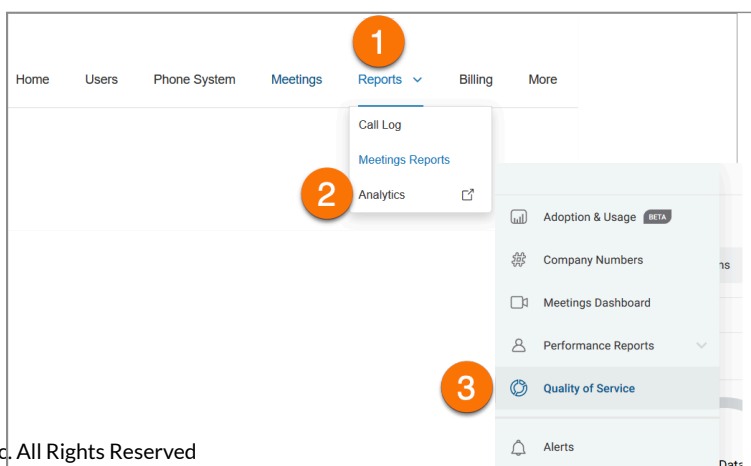
The Quality of Service reports provide near real-time information on the global health of the account and RingCentral Video and allows for proactive monitoring and reactive troubleshooting of potential issues. It gives you the ability to anticipate and diagnose call quality issues impacting your users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

To access Quality of Service reports:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Quality of Service**.

The Quality of Service page contains the following tabs:

- **Overview:** This tab enables you to:
  - Monitor overall account level quality proactively.
  - Monitor audio stream quality on top Geo locations.
  - Monitor patterns of audio quality for top ISPs and Endpoints.
  - Understand the impact of meeting stream volume on quality.
  - Filter quality information with different dimensions.
- **Extensions:** The Extensions tab features QoS analysis by user name or extension. It displays the aggregate data for an individual user, allowing for a much deeper analysis of the call and RingCentral Video meeting quality by leveraging user-specific graphs and trends.
- **Calls:** The Calls tab lets you view call quality data at a per call level so that you can identify specific quality issues.
- **MOS Performance:** The Mean Opinion Score (MOS) Performance dashboard provides an overview of call quality levels based on the minimum and target MOS thresholds for the previous month.
- **Meetings:** This enables you to:
  - Reactively troubleshoot when their employees report issues with their meetings.
  - List down a record of all meetings held within the selected timeframe.
  - Filter by various dimensions to be able to narrow down the list of records.



## Rooms and Devices reports

The Rooms & Devices report provides admins the ability to proactively monitor the global health of the company's RingCentral Rooms and hard-phone infrastructure. The report can be used to identify issues impacting users regarding service availability of Rooms and hard-phones.

The rooms part of this report provides an overview of the rooms' conditions over time, providing the trends and patterns of the devices. It provides data about the rooms' location, health, and status. It also gives information about the Host and Controller's model, operating system, app version, and status.

The Rooms & Devices page contains the following tabs:

- **Overview:** Provides the admins with visibility into the current state of RingCentral Rooms and hard-phones globally.
- **Rooms:** Lets you filter data by name, location, date range, room health, room status, ISP, Host's app version, and Controller's app version. This section is divided into 2 parts, Health Trend and Rooms list.
- **Devices:** Provides a list of offline devices with detailed information now and in relation to a historic (within the last 7 days) time period, to allow users to see the offline devices overtime
- **Unprovisioned Devices:** Devices that were recorded in the RingCentral system, but have never been set up.

To access Rooms & Devices:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Rooms & Devices**.

## Creating analytics alerts

The RingCentral Analytics Portal allows you to create alerts based on your analytics data.

To create an alert, follow these steps:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Alerts**.
4. Click **Alerts List**, then click **Create New**. For first time setup, click **Create New** in the middle.
5. Configure the parameters of your alert.
  - a. **General Information:** Enter the Alert Name and Alert Severity.
  - b. **Alert Trigger:** You can set your Target, Target Value, Trigger, Condition, Threshold, Monitoring Timeframe, and Alert Frequency.

- c. **Advanced Options:** Monitor your specific endpoints, day of the week, time of the day, or over a minimum call leg volume.
- d. **Delivery Channel:** You have a choice to receive your alert notifications via email or RingCentral app.
- e. **Edit Settings:** Alert owner can restrict access to an alert to View only (locked alert) or Edit (unlocked alert).

6. Click **Create Alert**.

The screenshot shows the RingCentral Admin interface. The top navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing', and 'More'. A dropdown menu is open under 'Reports', showing 'Call Log', 'Meetings Reports', and 'Analytics'. The 'Alerts' section is highlighted in the left sidebar. The 'Create New Alert' form is displayed on the right, with fields for 'Alert Name', 'Alert Severity', 'Alert Trigger' (Target, Target Value, Trigger, Condition, Threshold), 'Monitoring Timeframe', 'Alert Frequency', 'Advanced Options' (Endpoints for Monitoring, Monitoring Hours, Minimum Leg Volume), 'Delivery Channel' (Delivery Channel, Recipients), and 'Editing Settings' (Only Owner can edit this alert). The 'Create Alert' button is at the bottom.

## Creating report subscriptions

Subscriptions provide a way for you to automatically generate reports and send them via email to recipients. For example, if you would like a report generated that shows the number of calls that were abandoned while the caller was put on hold, you can do so with a subscription setting for a Queue Report.

To make use of the Subscription feature, you must first save a generated report. After that, you can use the Subscription page to send the report via email.

To save a report for the example given above:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Performance Reports**, then select **Queues**.
4. Click **Select KPIs**.
5. Tick the box for **# Abandon (Hold)**
6. Click **Done**.
7. Click **Save** in the upper right.
8. Enter a report name.
9. Click **Save**.

To create a subscription:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Subscriptions**.
4. Click **Create Subscription**.
5. Under **General Information**, enter the subscription name. Click the dropdown menu for **Report Type** and select (from the example above) **Performance Report**. Click the dropdown for **Report** and select the name of the report you saved. Note that only reports you have generated are available to you in this list.
6. Select the tabs.
7. Select the **Email Delivery Schedule**.
8. Select the **File Type** to be generated.
9. Enter the email address for the recipient of the report in the **Email the report to** field. You can specify more than one email address by clicking the plus sign (+) and adding other email addresses.
10. Click **Create Subscription**.

Subscriptions should be created on reports that have preset date-time windows such as yesterday, last week, last month, etc., in Performance Reports. Saving a report with a custom date range with specific dates will result in the recipient receiving the same report repeatedly. The user who created the Subscription

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

The screenshot illustrates the process of creating a new subscription in the RingCentral Admin Guide. The steps are numbered 1 through 10:

1. Click on the **Reports** menu item in the top navigation bar.
2. Click on the **Analytics** option in the dropdown menu.
3. Click on the **Subscriptions** option in the left sidebar.
4. Click on the **Create New Subscription** button.
5. Enter the **SUBSCRIPTION NAME** in the text field.
6. Select the **REPORT TYPE** (Performance Report) and the **REPORT** (Abandon Rate) from the dropdown menus.
7. Select the **FREQUENCY** (EVERYDAY) from the dropdown menu.
8. Select the **FILE TYPE** (Excel) from the dropdown menu.
9. Enter the **EMAIL** address in the text field.
10. Click on the **Create Subscription** button.



## Billing

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

If enabled for your account through RingCentral support, you will also see a Professional Services menu item in the Billing tab.

**Note:** Billing is an administrator function only. This option is not available to standard users.

## Overview page

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

The screenshot displays the RingCentral Billing Overview page. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing (selected), and More. The left sidebar lists various billing-related options: Overview (selected), Service Billing Detail, Billing History, Payment Method, Licenses & Inventory, Usage, Calling Rates, Purchase, Meetings, and Device Orders.

The main content area is titled "Billing » Overview" and contains several sections:

- Your Plan:** RingCentral Premium. Status: Active. Billing Cycle: 11/28/2020 - 12/27/2020. Billing Plan: Monthly. Links for Change and Cancel are provided.
- General Usage:** Current Plan Usage: 10 minutes / Unlimited. Paid SMS Usage: View Log. Mobile Users: View History. Link for View All Usage Detail.
- Credits:** Available Account Credits: \$0.00. Pending Credit: \$0.00. Free Service Credit: \$0.00.
- Services:** View Details. Monthly Charges: \$723.87/month. Next Billing Date: 12/28/2020.
- Upcoming Charges:** \$723.87 (Fees and Taxes excluded). Billing Date: 12/28/2020.
- Auto-Purchase:** Calling Credit Package: \$20.00 (equivalent to 513 Plan minutes at 4¢ or 6,667 API credits at 0.3¢). Link for Change.
- Payment Method:** Payment Type: Credit Card. Card Number: XXXX-XXXX-XXXX-1111. Card Type: Visa. Expiration Date: 12/2032. Link for View Detail.
- Billing History:** A table showing recent billing entries.

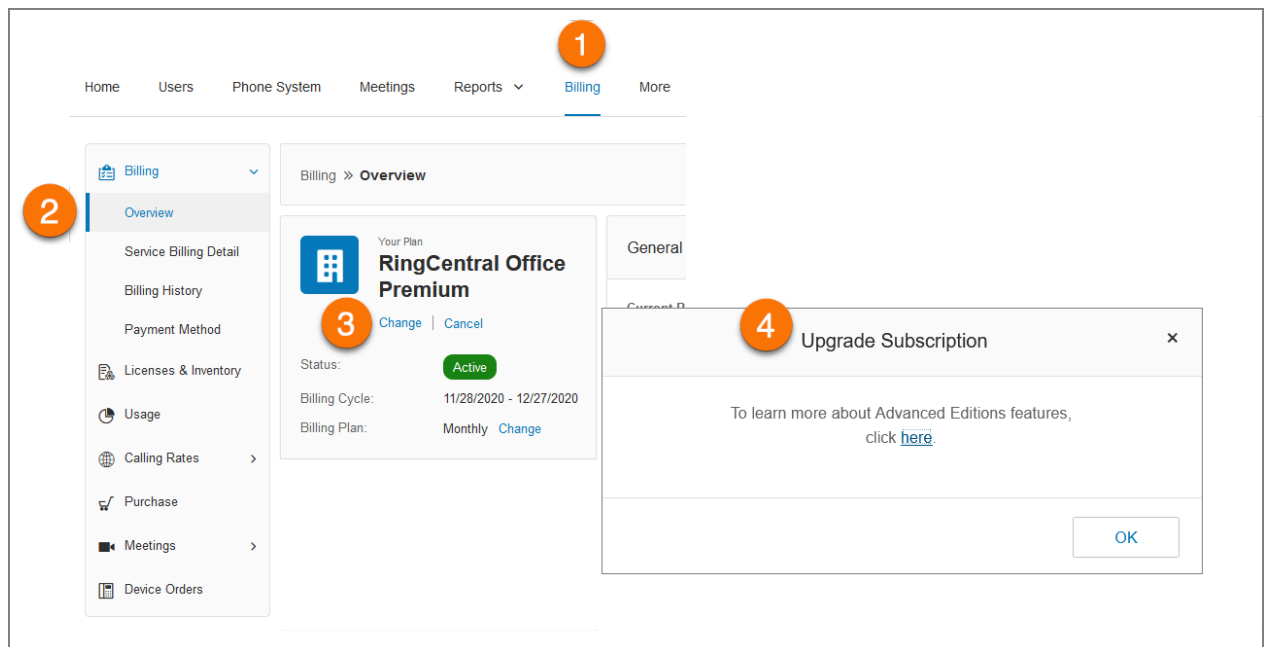
Date	Reference #	Description	Amount	Status
11/28/2020	2583543002	Recurring State...	\$894.40	Paid in Full
11/25/2020	2550470002	Change Order	\$0.74	Paid in Full
10/28/2020	1758189001	Recurring State...	\$888.87	Paid in Full

Link for View Full Billing History.

## Managing your service plan

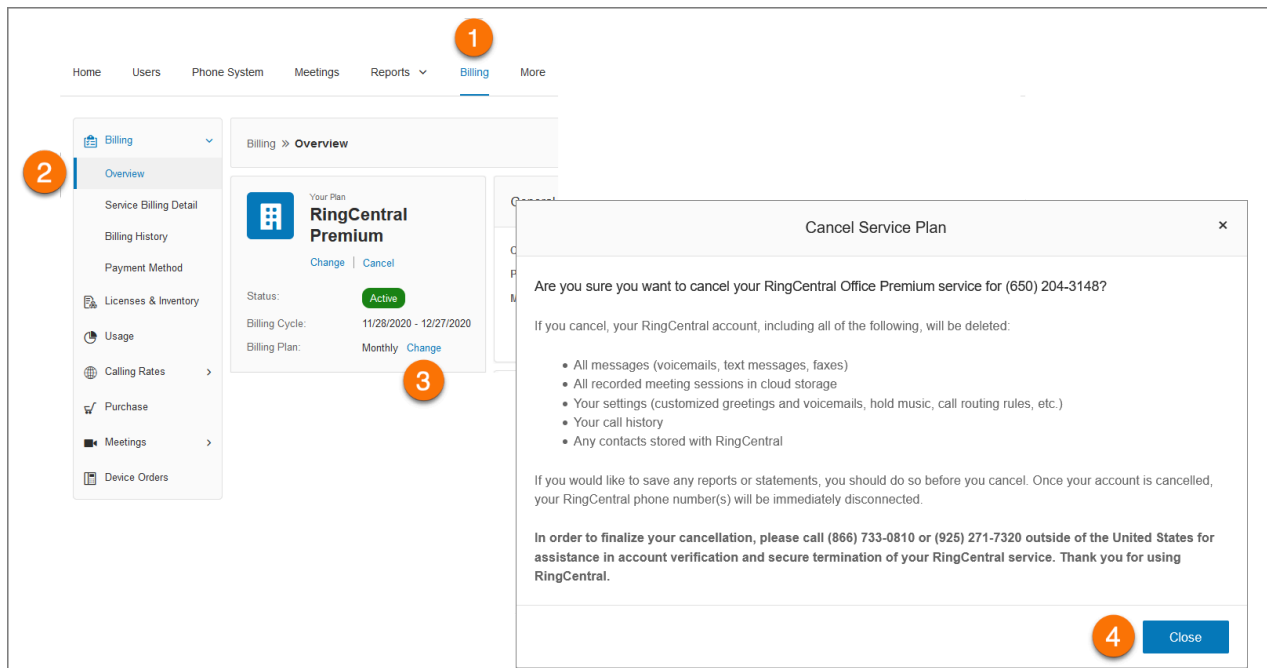
### Viewing/changing service plan

1. Click the **Billing** tab from the **Admin Portal**.
2. On the Overview tab, the service plan is under **Your Plan**.
3. Click **Change** to open the **Upgrade Subscription** window.
4. Click **here** to open the [RingCentral Plans and pricing](#) page. To proceed with changing your Service Plan, contact RingCentral Support.



## Canceling your service plan

1. Click the **Billing** tab from the **Admin Portal**.
2. Under Your Plan, click **Cancel**.
3. Follow the instructions on the **Cancel Service Plan** window.
4. Click **Close**.



## Using auto purchase

The Auto Purchase feature ensures you will never run out of calling credits. The selected package will be automatically purchased when you are running low on calling credits, which prevents any potential interruption of service. Purchased funds will roll over month-to-month for up to 12 months.

To view and select options for auto-purchase:

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

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes links for Home, Users, Phone System, Meetings, Reports, and Billing (highlighted with a red circle '1'). The Billing section is active, showing an Overview page. The left sidebar lists various billing-related options, with 'Billing' expanded. The main content area is divided into several sections: 'Your Plan' (RingCentral Premium, Status: Active, Billing Cycle: 02/28/2020 - 02/27/2021, Billing Plan: Annual), 'General Usage' (Current Plan Usage: 3 minutes / Unlimited, Paid SMS Usage: View Log, Mobile Users: View History), 'Credits' (Available Account Credits: \$0.00, Pending Credit: \$0.00, Free Service Credit: \$0.00), 'Services' (View Details), 'Auto-Purchase' (highlighted with a red circle '2'), and 'Payment Method' (Payment Type: Credit Card, Card Number: XXXX-XXXX-XXXX-1111, Card Type: Visa, Expiration Date: 03/2030). The 'Auto-Purchase' section shows a 'Calling Credit Package' of \$20.00 (equivalent to 513 Plan minutes at 4¢ or 6,667 API credits at 0.3¢). A modal window titled 'Auto-Purchase' is open, displaying the same introductory text and the 'Calling Credits Package' selection options (highlighted with a red circle '3'). The modal includes a 'Cancel' button and a 'Save' button (highlighted with a red circle '4').

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

Admin Portal AG

Billing >> Overview

**Billing**

- Overview
- Service Billing Detail
- Billing History
- Payment Method
- Usage
- Calling Rates
- Meetings
- Device Orders

**Your Plan**  
**RingCentral Premium**  
Change Cancel

Status: **Active**

Billing Cycle: 02/28/2020 - 02/27/2021

Billing Plan: Annual Change

**Services** View Details

Annual Charges: \$8,817.48/year

Next Billing Date: 02/28/2021

Upcoming Charges: **\$8,817.48**  
(Fees and Taxes excluded)

Billing Date: 02/28/2021

**General Usage**

Current Plan Usage: 3 minutes / Unlimited

Paid SMS Usage: View Log

Mobile Users: View History

View All Usage Detail

**Credits**

Available Account Credits: \$0.00

Pending Credit: \$0.00

Free Service Credit: \$0.00

**Auto-Purchase**

Calling Credit Package: \$20.00  
(equivalent to 513 Plan minutes at 4¢ or 6,667 API credits at 0.3¢)

Change

**Payment Method**

Payment Type: Credit Card

Card Number: XXXX-XXXX-XXXX-1111

Card Type: Visa

Expiration Date: 03/2030

View Detail

**Auto-Purchase**

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.

**Calling Credits Package**

☒ \$20.00 (equivalent to 513 Plan minutes at 4¢)

☐ \$100.00 (equivalent to 2,565 Plan minutes at 4¢)

Cancel 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**.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing (highlighted with a red circle 1), and More. The left sidebar menu shows Billing (highlighted with a red circle 2), Usage, Calling Rates (highlighted with a red circle 3), Outbound Rates (highlighted with a red circle 3), Inbound Rates, Premium Rates, Meetings, and Device Orders. The main content area is titled 'Calling Rates > Outbound Rates'. It includes a description of international calling rates and two toggle switches: 'International Calling' (turned on, highlighted with a red circle 4) and 'International SMS' (turned off). Below the toggles are search and status filters. A table lists outbound rates for Afghanistan, with columns for Status, Calls to\*, Type, Prefix, Call Rate\*\*, and SMS Rate\*\*. The table shows two entries: 'Mobile' with a call rate of 38¢ and 'Regular' with a call rate of 28¢. A red circle 5 highlights the 'Status' filter, and a red circle 6 highlights the first row of the table.

Status	Calls to*	Type	Prefix	Call Rate**	SMS Rate**	Actions
<input type="checkbox"/>	Alghanistan	Mobile	937	38¢	15¢	⋮
<input type="checkbox"/>	Alghanistan	Regular	93	28¢	15¢	⋮

## Viewing your Billing History

Billing History contains a list of your billing transactions and billing statements.

To view your billing history:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Billing History**.

Click **View** at the far right to view and print your billing statement for the specified month

The screenshot displays the RingCentral Admin Portal interface. At the top, a navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing (highlighted with a blue underline and a callout '1'), and More. On the right of the navigation bar, there is an 'Admin Portal' dropdown, a grid icon, and a profile icon labeled 'AG'. A sidebar on the left contains a 'Billing' menu (callout '2') with sub-items: Overview, Service Billing Detail, Billing History (selected), Payment Method, Usage, Calling Rates, Meetings, and Device Orders. The main content area is titled 'Billing » Billing History'. It features a search bar, a 'Status' dropdown, and a 'Print' button. Below this is a table with the following data:

Date	Reference #	Description	Amount	Payment Method	Status	File
07/31/2020	950788001	Change Order	\$394.21	Visa [1111]	Paid in Full	<a href="#">View</a> (callout '3')
07/29/2020	1840491002	Change Order	\$298.90	Visa [1111]	Paid in Full	<a href="#">View</a>
07/26/2020	1804542002	Change Order	\$41.17	Visa [1111]	Paid in Full	<a href="#">View</a>
02/28/2020	410615001	Recurring State...	\$10,278.96	Visa [1111]	Paid in Full	<a href="#">View</a>

## 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**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing (highlighted with a blue underline and a red circle with the number 1), and More. On the right of the navigation bar, there are links for Admin Portal, a QR code, and a user profile icon labeled 'AG'. A left-hand sidebar menu is open, showing various billing-related options: Overview, Service Billing Detail, Billing History, Payment Method (highlighted with a red circle with the number 2), Usage, Calling Rates, Meetings, and Device Orders. The main content area is titled 'Billing » Payment Method' and includes a '+ Add Backup Credit Card' button. The 'Payment Information' section (highlighted with a red circle with the number 3) displays the Card Number (XXXX-XXXX-XXXX-1111 Visa) and the Expiration Date (03/2030). Below this, the 'Billing Address' section contains fields for First Name, Last Name, Contact Phone, Contact Email, Country (United States), Street Address (20 Davis Dr), Additional address (Optional), City (Belmont), State/Province (California), and Zip Code (94002-3002). An 'Edit' button (highlighted with a red circle with the number 4) is located to the right of the Payment Information section.

## 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**.



## 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**.

## 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.

Below is a list of licenses and devices you have on your account. You can filter them by product category, cost center and site to check inventory

**Note:** Licenses can be used across sites, full-paid devices can be used across cost centers.

Search

Product Name	Total	In-Use	Available	Actions
Office Licenses	9	9	0	
Domestic DigitalLine Unlimited	9	<a href="#">9</a>	0	
Additional Local Numbers	4	4	0	
Domestic	4	<a href="#">4</a>	0	
Desktop Phones	17	16	1	
Cisco 7841 Gigabit Business Phone <i>Purchased</i>	2	<a href="#">2</a>	0	
Cisco 8861 Gigabit Color Business Phone with 1 Expansion Module <i>Purchased</i>	1	<a href="#">1</a>	0	
Cisco 8861 Gigabit Color Business Phone <i>Purchased</i>	1	<a href="#">1</a>	0	
Common Lines	9	<a href="#">9</a>	0	
Rooms	1	0	1	
International Calling Credits Bundles \$300	1*			

## 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**.









**Licenses & Inventory**

Below is a list of licenses and devices you have on your account. You can filter them by product category, cost center and site to check inventory

**Note:** Licenses can be used across sites, full-paid devices can be used across cost centers.

Search  


 **3**







Product Name	Total	In-Use	Available	Actions
 MVP Licenses	1005	61	944	
 Additional Local Numbers	39	39	0	   
 Additional Toll-Free Numbers	16	16	0	   

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.

Download Licenses ×

1 Select Licenses 2 Enter Email

 **4a**

Product Name	Total	In-Use	Available	Actions
 MVP Licenses	1005	61	944	
<input type="checkbox"/>  Additional Local Numbers	39	39	0	
<input type="checkbox"/>  Additional Toll-Free Numbers	16	16	0	

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**.

Download Licenses

✓ Select Licenses    2 Enter Email

Send to email

Note: depending on how large your account is, the email may take up to 15 minutes.

Back    Send

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.

1. Billing

2. Usage

3. Current Plan Usage: 3 minutes / Unlimited

4. Purchased Calling Credits: \$0.00 available [View Rates](#)

5. Credits

6. Paid SMS Usage: [View Log](#)

## 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**.

Standard dialog

Download SMS log

Filter entries by date

Last 30 days

Your download will appear as a zipped CSV file.

Cancel Download

Download started

Your SMS log download has started.

When the file is ready, it will be available to download for 48 hours on the Download History page.

OK

Land on download history tab

## Viewing mobile user history

A virtual extension is a user extension without an assigned digital line. Virtual extensions forward incoming calls to mobile phones, extensions, or other external numbers and allow for limited outbound dialing. It becomes a Mobile User extension if it makes or receives ten or more calls in a given month (billing cycle).

To view the mobile users in your account:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Usage**.
3. Click **View History** on **Mobile Users**.
4. Review the page for the number of mobile users.
5. Filter your view and click **Apply**.
6. View the **Renewal Period**, **Name**, **Extension**, and **Number of External Calls**.
7. Click **Done**.

The screenshot displays the RingCentral Admin interface for the Billing section. The navigation bar at the top includes Home, Users, Phone System, Meetings, Reports, Billing (highlighted with a blue underline and a circled '1'), and More. A left sidebar contains Billing, Usage (highlighted with a blue bar and a circled '2'), Calling Rates, Meetings, and Device Orders. The main content area shows the Usage section with a sub-section for General Usage, displaying 'Current Plan Usage: 3 minutes / Unlimited' and 'Paid SMS Usage: [View Log](#)'. A 'Mobile Users: [View History](#)' link is also present (circled '3').

The 'Mobile Users History' modal window (circled '5') is open, featuring a filter section with 'Filter by: Billing period' (dropdown), 'Billing period: Current' (dropdown), and 'All' (button), along with a 'Select Ext' button. Below the filters are 'Reset' and 'Apply' buttons (circled '5'). The main table (circled '6') has columns for 'Renewal Period', 'Name', 'Extension', and 'Number of External Calls'. The table is currently empty. At the bottom of the table, it shows 'Total: 0' and a 'Show: 25' dropdown with pagination controls '< 1 >'. Below the table, there is a section for sending a report via email, with a text input field and a 'Send' button. A 'Done' button (circled '7') is located at the bottom right of the modal.



## Adding calling credits bundles

The Credits section in the Usage tab contains your calling credits bundle and international calling credit bundle.

To add Additional Bundles:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Usage**.
3. To add a toll-free minute bundle:
  - a. Click **Add Bundle** on **Calling Credits**.
  - b. Select toll-free minutes bundle from the dropdown list.
  - c. Click **Next**.
  - d. Confirm your purchase.
4. To add an international calling credit bundle:
  - a. Click **Add Bundle** on **International Calling Credits**.
  - b. Select the international calling credit bundle from the dropdown list.
  - c. Click **Next**.
  - d. Confirm your purchase.

The screenshot illustrates the steps to add calling credits bundles in the RingCentral Admin Portal. The top navigation bar shows the 'Billing' tab selected (1). The left sidebar shows the 'Usage' tab selected (2). The main content area displays the 'Usage' section, which includes 'General Usage' and 'Credits' subsections. The 'Credits' subsection shows 'Calling Credits' and 'International Calling Credits' with 'Add Bundle' links (3). Two modal windows are shown: 'Select Toll-Free Minutes Bundle' and 'Select international bundle', both with dropdown menus set to 'None (Free)' and 'Next' buttons (4).

## Managing Calling Rates

The Calling Rates tab under Billing contains international calling rates and premium domestic rates.

### Enabling international calling and SMS

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Calling Rates**.
3. Click **Outbound Rates**.
4. Toggle on the switches for **International Calling** and **International SMS**.
5. You can search for the country to view the call rate and SMS rate.
6. To disable a specific country, do one of the following:
  - a. Tick the box beside the country, click **Disable**, and click Yes on the **Confirmation** window.
  - b. Click the **More** kebab icon at the far right of the country under **Actions**, click **Disable**, and click **Yes** on the **Confirmation** window.

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

Admin Portal AG

**2** **3** **1** **4** **5** **6**

Billing > Usage > **Calling Rates** > **Outbound Rates** > Inbound Rates > Premium Rates > Meetings > Device Orders

Calling Rates >> **Outbound Rates**

Outbound long distance rates apply when calling international destinations from your RingCentral phone lines or when using the Call Me feature. You may disable international calling to specific destinations to avoid long distance charges.

☒ International Calling ⓘ ☐ International SMS ⓘ

Search  Status

✓ Enable ✕ Disable

<input type="checkbox"/>	Status	Calls to*	Type	Prefix	Call Rate**	SMS Rate**	Actions
<input type="checkbox"/>	✓	Afghanistan	Mobile	937	38¢	15¢	⋮
<input type="checkbox"/>	✓	Afghanistan	Regular	93	28¢	15¢	⋮

## Viewing inbound rates

The Inbound Rates tab shows the rates when you receive calls to your RingCentral local or toll-free number from specific countries.

To view the Inbound Rates:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Calling Rates**.
3. Click **Inbound Rates**.

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

Admin Portal AG

Calling Rates » **Inbound Rates**

The following inbound rates are applied when you receive calls to your RingCentral local or toll free number in countries listed below. Adding international local or toll free numbers allows you to have an easy to reach local presence in many different countries without having to set up local phone plans. International local and toll free numbers can also be used for premium conferencing numbers.

Search

Calls from	Type	Country Code	Call Rate*
Algeria	Local	213	12.4¢
Angola	Local	244	9¢

## Viewing premium rates

The Premium Rates tab shows the premium domestic rates.

To view the Premium Rates:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Calling Rates**.
3. Click **Premium Rates**.

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

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Calling Rates » **Premium Rates**

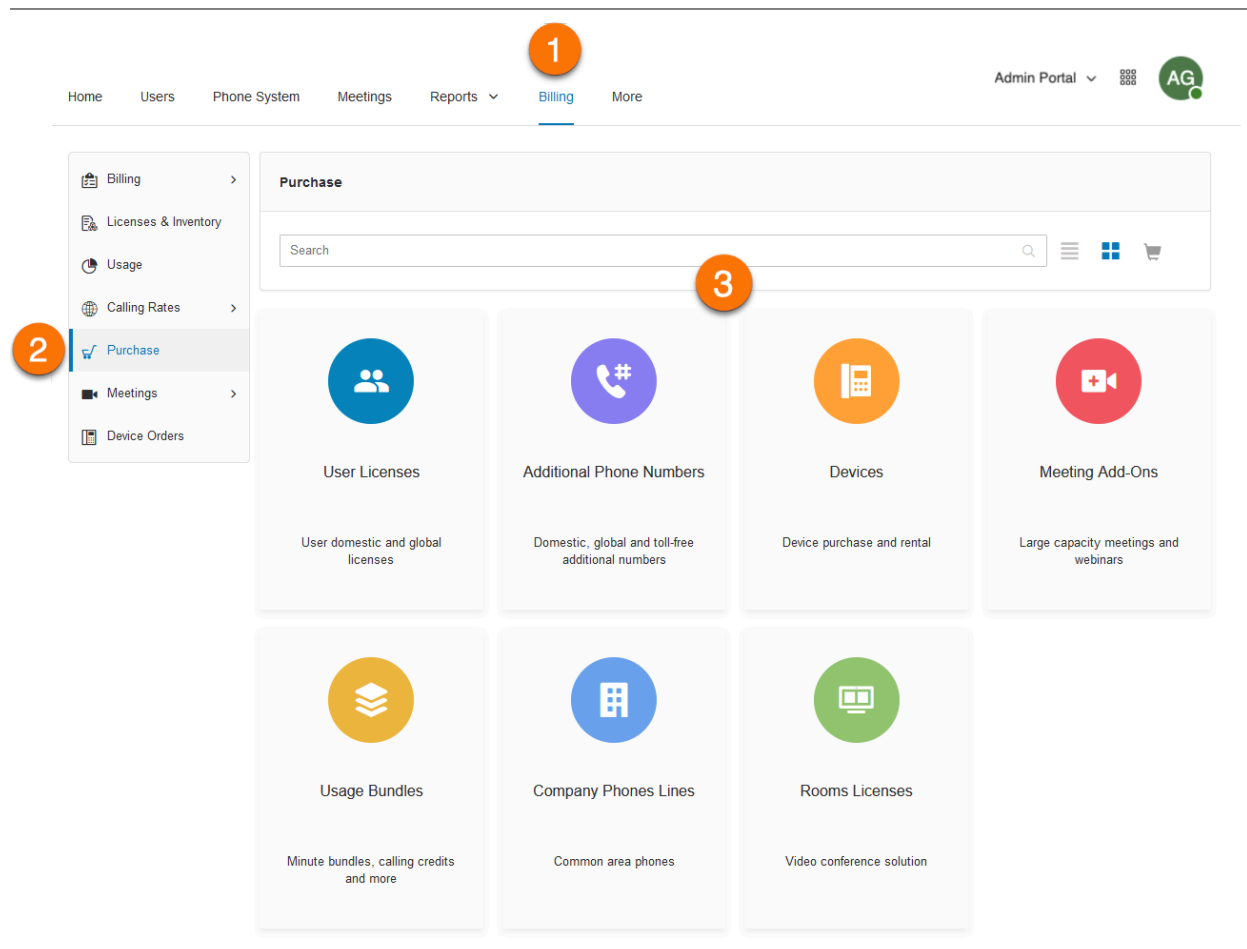
In the US / Canada, premium domestic rates apply when you receive an incoming call from Alaska or Hawaii to your toll free number. You may disable inbound calls from Alaska and Hawaii to your toll free numbers to avoid incurring premium charges.

Status	Calls from	Type	Country Code	Inbound Calls to Toll Free Num...	Actions
✓	Hawaii	Regular/Mobile	1	3.9¢	⋮
✓	Alaska	Regular/Mobile	1	3.9¢	⋮

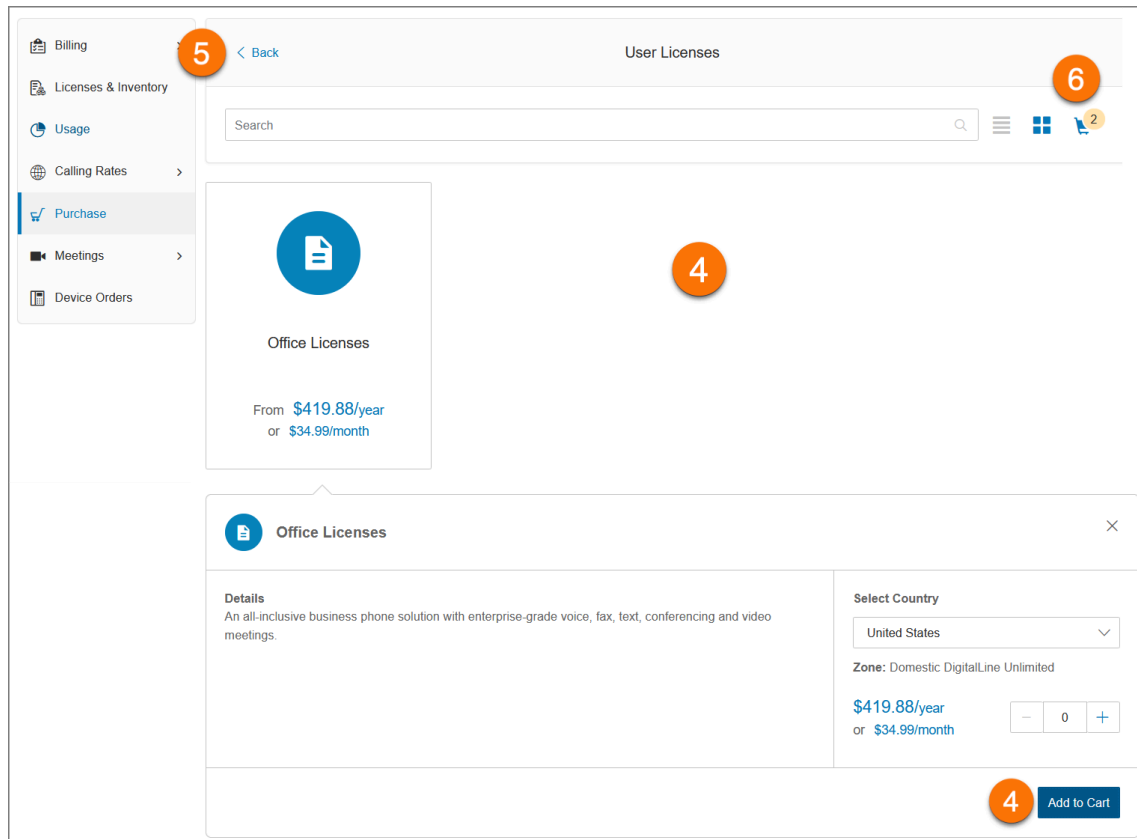
## Managing Purchases in the Billing tab

The Purchases tab gives you a catalog of purchase options in one convenient place.

1. Click the **Billing** tab from the **Admin Portal**.
2. Click on **Purchase** for an overview of purchase options.
3. Click on any tile to see relevant purchase options, or use the Search field to type in your search criteria.



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



## Using the Shopping cart to check out




When you're finished shopping and are ready to check out, click on the shopping cart icon in the upper right corner. A **Review Items and Checkout** window displays to lead you through completing the process. The screen may vary depending on your selections.

### Review Items

Review your purchases, change quantities or delete items.

Review Items and Checkout

1 Review Items
2 Assign Site
3 Add Shipping Info
4 Review Order
5 View Statement

Product Name	Price per Item	Qty	Total Price	Actions
Recurring Items (2)				
 <b>Office Licenses</b> Domestic DigitalLine Unlimited - United States	\$419.88/year \$34.99/month	- 1 +	\$419.88/year \$34.99/month	<a href="#">Delete</a>
 <b>Webinars</b> Webinar 100	\$400.00/year \$33.33/month	- 1 +	\$400.00/year \$33.33/month	<a href="#">Delete</a>
One-time Purchase Items (5)				
 <b>Cisco CP6821 Business IP Phone</b> New Phone, United States	\$99.00	- 5 +	\$495.00	<a href="#">Delete</a>
<div> Recurring \$819.88/year ⓘ  One-time Purchase \$495.00 </div> <div> <b>Today's Estimated Total**</b> \$1,314.88 </div> <div> **This price does not include calculations for prorated amounts, taxes, fees, and/or shipping. </div>				

Back
Next

### Assign Site


In this pane, you can choose a site to which you want the new assets assigned. Use the **Select Site** dropdown field in the upper right, or use the dropdown in the **Site** column. Assign all assets to the same site, or choose **Split** in the **Actions** column to allocate resources to different sites. Click **Assign to Selected**, then click **Next**.

Review Items and Checkout

Review Items
2 Assign Site
3 Add Shipping Info
4 Review Order
5 View Statement

Assign Site to Items (5)

Select Site
Select Site
Assign to Selected

<input type="checkbox"/>	Product Name	Site	Qty	Actions
<input type="checkbox"/>	 <b>Cisco CP6821 Business IP Phone</b> New - United States	Select Site	5	Split

Back
Next

## Add Shipping Info

Choose a ship-to address from the **Select Shipping Address** dropdown. Choose **Edit** to modify an existing address or **New** to add a new address. In the **Attention to** field, add a recipient name. Choose a shipping method from the **Select Shipping Method** dropdown. Check the box to the left of the entry you want to assign. Choose **Split** in the **Actions** column to allocate purchases to more than one recipient. Click **Next**.

Add Shipping Info



Review Items
Assign Site
3 Add Shipping Info
4 Review Order
5 View Statement

Auto-assign the shipping address based on Site address. Attention to and Ground Shipping will be the default.
Auto Assign

Select Shipping Address
Attention to
Select Shipping Method

20 Davis Dr, Belmont, CA, 94002-3002, United States
Edit
New
Something New
Ground
Assign to Selected

Add Shipping Info to Items (5)

<input type="checkbox"/>	Product Name	Qty	Actions
<input checked="" type="checkbox"/>	 <b>Cisco CP6821 Business IP Phone</b> New - United States	4	Split
<input type="checkbox"/>	 <b>Cisco CP6821 Business IP Phone</b> New - United States	<input type="text" value="1"/>	Remove Split

Shipping Groups

Add Shipping Info	Attention to	Shipping Method	Device Qty	Actions
No shipping groups has been created yet.				

Back
Next

## Review Order

The **Review Order** pane shows an itemized list of purchases for the current order and their cost breakdown. Click the checkbox next to the acknowledgement at the bottom of the pane, then click **Next**.

Review Items and Checkout

✓ Review Items
✓ Assign Site
✓ Add Shipping Info
4 Review Order
5 View Statement

Period	Charges and credits	Unit Price	Quantity	Amount
02/28/2020 - 02/27/2021	DigitalLine Unlimited (new purchase)	\$419.88	1	\$419.88
02/28/2020 - 12/16/2020	DigitalLine Unlimited - Prorate Adjustment	(\$336.13)	1	(\$336.13)
02/28/2020 - 02/27/2021	RingCentral Webinar 100 (new purchase)	\$400.00	1	\$400.00
02/28/2020 - 12/16/2020	RingCentral Webinar 100 - Prorate Adjustment	(\$320.22)	1	(\$320.22)
(One time charge)	Cisco CP6821 Business IP Phone	\$99.00	5	\$495.00
(One time charge)	Shipping & Handling Fees: US - Ground	\$6.05	5	\$30.25
Charges after Discounts and Prorates:				\$688.78
<b>Taxes</b>				<b>Amount</b>
<a href="#">State and local taxes and fees</a>				\$53.04
<a href="#">Compliance and Administrative Cost Recovery Fee</a>				\$48.00
Compliance and Administrative Cost Recovery Fee - Prorate Adjustment				(\$38.43)
<a href="#">e911 Service Fee</a>				\$12.00
e911 Service Fee - Prorate Adjustment				(\$9.61)
<a href="#">EUSF (VoIP)</a>				\$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
<b>Total Charged to Credit Card:</b>				<b>\$757.87</b>

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



## View Statement

The View Statement pane shows a summary of all purchase and account details for your order. Click Print to keep a hard copy for your records. Click Done to complete the transaction.

Review Items and Checkout

[✓ Review Items](#)
[✓ Assign Site](#)
[✓ Add Shipping Info](#)
[✓ Review Order](#)
[5 View Statement](#)

Account Number:

(409) 240-2563

Billed To

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

Pay To

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

Service Plan:

RingCentral Office Premium

Statement Date:

12/16/2020

Paid By:

Visa[1111]

Reference#:

2444893002

Print
Done

## Managing meetings in the Billing tab

The Meetings section allows you to manage RingCentral Video, including managing licenses, downloading software, adding and viewing rooms, and managing settings.

### RingCentral Rooms licenses

RingCentral Rooms offers a convenient way to start, join, and control RingCentral Video meetings in a conference room from an iPad or Poly controller. Use RingCentral Rooms to start or join RingCentral Video meetings which are initiated from different endpoints. RingCentral Rooms supports up to 200 participants in a single meeting.

RingCentral Rooms requires a RingCentral 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.

## 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**.

The screenshot illustrates the 'Device Orders' management interface in the RingCentral Admin Portal. The top navigation bar shows the 'Billing' tab selected. The left sidebar lists various options, with 'Device Orders' highlighted. The main content area displays a table of device orders. A modal window titled 'Edit Order: 162009027' is open, showing details for a pending order. The modal includes sections for 'Original Order', 'Order Changes', 'Original Phone Order Charges', and 'Phone Order Charges/Credits'. Red and green text indicates changes to quantities and costs. A 'Next' button is visible at the bottom right of the modal.

Order Number	Order Placed	Device Quantity	Status	Actions
162009027	09/11/2020 10:01 AM	4	Pending	Edit Order

Original Order				
Quantity	Area Code	Phone	Original Charges*	
4	(415)	Polycom VVX-310 Gigabit Ethernet Phone	\$836.00 (4 x \$209.00) - one time	

Order Changes				
Quantity	Area Code	Phone	New Charges/Credits*	
(2)	(415)	Polycom VVX-310 Gigabit Ethernet Phone	(\$418.00) (2 x \$209.00) - one time	
2	(415)	Yealink W52P with 2 Handsets	\$678.00 (2 x \$339.00) - one time	

Original Phone Order Charges			
One Time Charges	Quantity	Sub-total*	
Phones	4	\$836.00	
Shipping Fees		\$21.55	
<b>Recurring Charges</b>		<b>Sub-total*</b>	
Phone Rental	0	\$0.00	
<b>Total Paid*</b>		<b>\$857.55</b>	

Phone Order Charges/Credits ①			
One Time Charges/Credits	Quantity	Sub-total*	
New Phones	2	\$678.00	
Credits from Original Order	(2)	(\$418.00)	
<b>Recurring Charges/Credits</b>		<b>Sub-total*</b>	
New Phone Rental	0	\$0.00	
Rental Credits from Original Order	(0)	(\$0.00)	
<b>New Sub-total Charges/Credits*</b>		<b>\$260.00</b>	

\*Total charges do not include taxes, fees, prorates and discount.

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

**Update Shipping for Order 162009027** ✕

Shipping Groups ⓘ

Quantity	Destination	Shipping Method			
2	1400 Faxon Island Blvd, Ste 700, San Mateo, CA,...	GROUND	View ▾	<b>Change Shipping</b>	Delete
2	20 Davis Dr, Belmont, CA, 94002-3002	GROUND	View ▾	<b>Change Shipping</b>	Delete

Select shipping for the phones below:

**Add to Shipping Group** 🔍

<input type="checkbox"/>	Phone	Phone Number	Assigned To	Ext.
All phones assigned to shipping groups				

**Original Phone Order Charges**

One Time Charges	Quantity	Sub-total*
Phones	4	\$836.00
Shipping Fees		\$21.55
<b>Recurring Charges</b>		<b>Sub-total*</b>
Phone Rental	0	\$0.00
<b>Total Paid*:</b>		<b>\$857.55</b>

**Phone Order Charges/Credits ⓘ**

One Time Charges/Credits	Quantity	Sub-total*
New Phones	2	\$678.00
Credits from Original Order	(2)	(\$418.00)
New Shipping Fees		\$28.42
Shipping Fees from Original Order		(\$21.55)
<b>Recurring Charges/Credits</b>		<b>Sub-total*</b>
New Phone Rental	0	\$0.00
Rental Credits from Original Order	(0)	(\$0.00)
<b>New Sub-total Charges/Credits*:</b>		<b>\$266.87</b>

\*Total charges do not include taxes, fees, prorates and discount.

< Back Next >

**Review and Submit** ✕

**Charges**

One Time Charges	Charges	
Additional RingCentral Services ⓘ	\$586.42	Expand
<b>Charges: \$586.42</b>		

**Adjustments**

One Time Charges	Credit	
Credit - Additional RingCentral Services ⓘ	(\$390.83)	Expand
<b>Adjustments: (\$390.83)</b>		

**Taxes, Charges and Fees**

State and local taxes and fees	\$51.64
<b>Taxes and Fees: \$51.64</b>	
Total Charges: \$586.42	
Total Adjustments: (\$390.83)	
Total Taxes & Fees: \$51.64	
Sub-total: \$247.23	
Total deducted from account credit balance: \$0.00	
<b>Total charged to credit card: \$247.23</b>	

Adjustments are calculated based on the unused portion of your previous service(s) and deducted from the cost of your new service(s).

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

☒ I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of **\$247.23** to be charged to my credit card ending in \*\*\*\*1111.

< Back Next >

**Notification** ✕

You are about to make changes to your original order. Each order can only be changed once. When you submit these changes, your order will be processed immediately and will no longer be eligible for future changes.

Cancel **OK**

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

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

Admin Portal

[Billing](#) [Usage](#) [Calling Rates](#) [Meetings](#) [Device Orders](#)

### Device Orders

Time Period: Past 6 months

Order Number	Order Placed	Device Quantity	Status	Actions
162009027	09/11/2020 10:01 AM	4	Submitted	

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

Admin Portal

[Billing](#) [Usage](#) [Calling Rates](#) [Meetings](#) [Device Orders](#)

### Device Orders

Time Period: Past 6 months

Order Number	Order Placed	Device Quantity	Status	Actions
162009027	09/11/2020 10:01 AM	4	Submitted	

#### Order Details

Package ID: 419008	Status: Submitted	Shipping Address:
Request Number: -1	Shipping Speed: GROUND	1400 Fashion Island Blvd, Ste 700, San Mateo, 94404-2073
Number of Device: 2	Tracking Number:	
<a href="#">View Device List</a>		
Package ID: 420008	Status: Submitted	Shipping Address:
Request Number: -1	Shipping Speed: GROUND	20 Davis Dr, Belmont, 94002-3002
Number of Device: 2	Tracking Number:	
<a href="#">View Device List</a>		

## Using the Cost Center Management feature

The Cost Center Management feature allows you to manage and monitor expenses for groups or individuals. Administrators can assign purchases of RingCentral services to a department or an individual with cost center codes. Each transaction can be assigned to a specific cost center code that you have created. You can create cost center codes while you are in process or upload predefined codes.

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Cost Center Management**.
3. Click **Cost Centers**.
4. Select an existing **Cost Center Code**. If you do not have any cost center codes, see the next page on how to create one.
5. You will see the Cost Center's summary, which includes:
  - a. Number of users assigned to the Cost Center.
  - b. The Cost Center's total recurring charges per month.
  - c. Billing Items - Assigned: queue/user extensions and DigitalLines.
  - d. Billing Items - Unassigned and Shared: company numbers.
6. Click **See details** for the complete list of Billing Items.

**Note:** To enable the Cost Center Management feature, contact your RingCentral account manager.

The screenshot displays the RingCentral Admin Portal interface for Cost Center Management. The top navigation bar includes 'Home', 'Users', 'Phone System', 'Meetings', 'Reports', 'Billing' (1), and 'More'. The left sidebar contains 'Billing', 'Usage', 'Calling Rates', 'Meetings', 'Device Orders', 'Cost Center Management' (2), 'Cost Centers' (3), and 'Billing Items'. The main content area is titled 'Cost Center Management » Cost Centers'. It features a dropdown menu for 'Cost Center: Customer Service' (4), a 'Sorting: Most Recent' dropdown, and a '+ Add Cost Center' button. Below this is a table listing cost centers, with 'Customer Service' selected. To the right of the table is a 'Cost Center Info' section (5) showing 'Users: 58' and 'Total Recurring Charges: \$1,851.80 / Month'. Below this is a 'Billing Items' section showing 'Assigned (94): \$1,137.22 / Month' and 'Unassigned and Shared (148): \$714.58 / Month'. A 'See details' button (6) is located at the bottom right of the main content area.

## Adding Cost Center codes

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Cost Center Management**.
3. Click **Add Cost Center**.
4. Enter your preferred **Name** and **Billing Code** (optional).
5. Click **Save**.

**Note:** Administrators can also add a Cost Center Code while processing a transaction. When the administrator is asked to assign a purchase to a Cost Center Code, there will be a button to **Add New Code** the administrator can click.

## More

In the Admin Portal, the **More** menu lists many important features for your company's phone system.

- **Audit Trail** lets you find and capture changes made by users that affect system events, configuration, and user accounts.
- **Service Status** allows Users and Administrators to view any high level service impacting issues on the RingCentral platform with or without logging in.
- **Appearance** lets you add your company logo to your RingCentral online account. You can also link your company logo to your company's website for smoother navigation.
- **Directory Integration** allows you to automatically provision users from your Active Directory or G Suite corporate directory into RingCentral.
- **Multi-Site Settings** allows you to configure and manage your different office locations under one account.
- **Single Sign-On (SSO)** lets employees in a company access multiple applications with one set of credentials. RingCentral SSO supports the Kerberos network authentication service (on Windows), as well as integrates with Google SSO.
- **Session Timeout** lets you configure a session timeout for all users.
- **Hot Desk Session Timeout** specifies the time period when guest users will be logged out from phone endpoints, or allows you to configure no timeout.
- **Masked Numbers** setting hides certain information from Administrators for a subset of users in order to meet country-specific compliance requirements.
- **Trust Portal** allows customers to access RingCentral's security and compliance documents. It provides audit reports and compliance documentation to assist customers with their compliance, regulatory, and data protection diligence.
- **Archiver** lets you securely save your messages and recorded calls automatically and easily search the stored data at any time from within your SFTP or Dropbox cloud storage account to quickly retrieve the records.
- **App Gallery** is where you can discover application integrations that are commercially available, and where developers can showcase their integrations.
- **Developer Portal** is a place where you request access to the RingCentral Connect Platform.



## Service console

### Using the Audit Trail feature

The Audit Trail feature allows the Super Admin or a User assigned with a Billing Admin role to:

- Track the changes on the RingCentral account which can be used for auditing and/or troubleshooting.
- Generate the report with filter options.
- See changes made by other Administrators (applicable to organizations with multiple administrators who need a changelog in order to provide coordinated support).
- 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.

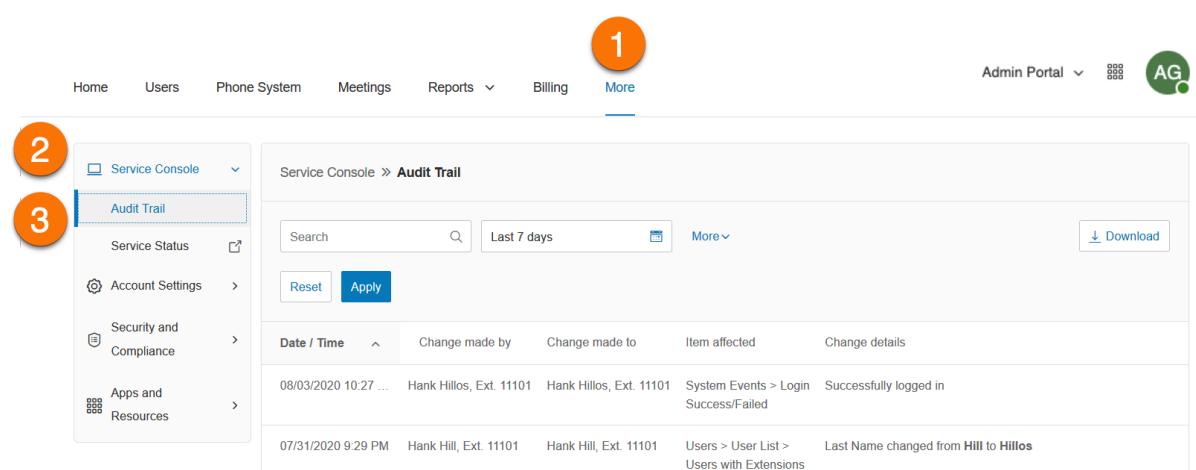
#### RingCentral app admin settings

- **Administrators:** Administrators added or removed (First Last, Ext.).

- **Company settings:** Enable phone features (on/off); Allow employees to add people (on/off); File sharing (service, on/off), for example Google Drive on/off, Evernote on/off, etc.; Allow Giphy sharing (max rating), for example, Max rating of PG-13.
- **Data Retention:** Policy set to N days.
- **Compliance exports:** Exports (on/off); Request/ download export enabled/disabled for UserName; Download requested by Name/ email.

## Accessing the Audit Trail feature

1. Click the **More** tab from the **Admin Portal**.
2. Under **Service Console**, click **Audit Trail**.



## Audit Trail report details

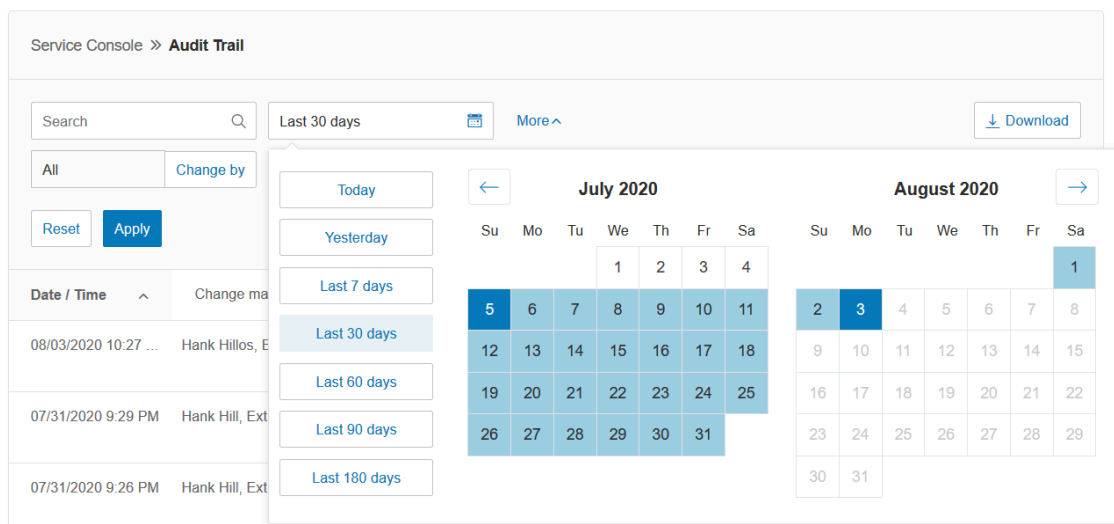
When a particular event is captured, these details are provided in the report:

- **Date/Time** - changes logged using Coordinated Universal Time (UTC) and displayed based on logged-in user's regional timezone setting.
- **Change made by** - person who made the change.
- **Role\*** - permission level of the person who made the change.
- **Change made to** - indicates which item was changed.
- **Item affected** - indicates the configuration that was changed.
- **Change details** - description of the change.
- **Endpoint\*** - application name.
- **IP Address\*** - application IP address.

\*Indicates these report fields are only available in a downloaded comma- delimited (CSV) log file.

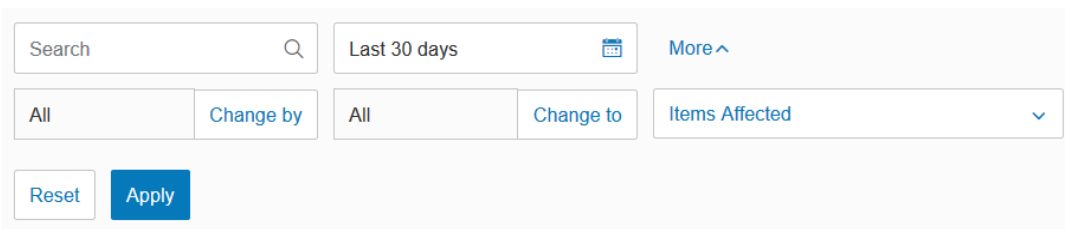
## Search Capability

You can search records that provide report details by time periods: Today, Yesterday, Last 7 days, Last 30 days, Last 60 days, Last 90 days, and Last 180 days.



## 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**.

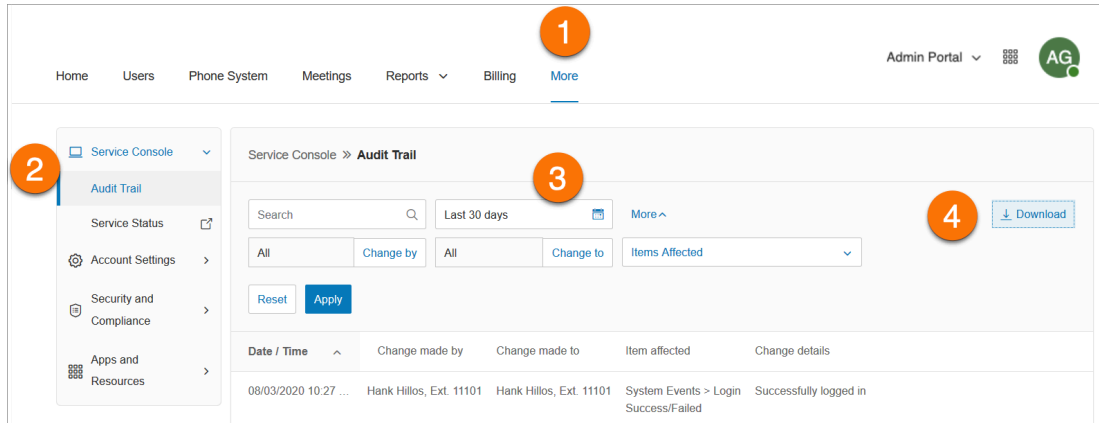
## Downloading an Audit Trail report

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**.

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.


Login



## Service Status

Core Services
✓ ⓘ ⚠ ⚡

⚠ Contact Center
AMERICAS

A portion of RingCentral Contact Center customers may be experiencing intermittent playback issues with Engage QM.

**STATUS UPDATE**

**JULY 21, 2021**  
2:25:58 PM EDT

RingCentral Contact Center customers may be experiencing screen recording playback issues. Contact Center teams continue to work with a third-party vendor to resolve this issue. The next update for this issue will take place in the morning of 7/23, or sooner if a significant change in status occurs. If you are experiencing this issue, please reach out to RingCentral customer support.

	AMERICAS	EMEA	APAC
⊕ Calling	✓	✓	✓
⊕ Phones	✓	✓	✓
⊕ Meetings	✓	✓	✓
Contact Center	⚠	✓	✓
Messaging	✓	✓	✓
⊕ SMS	✓	✓	✓
⊕ Fax	✓	✓	✓
Connect Platform	✓	✓	✓
Service Portal	✓	✓	✓
Developer Sandbox	✓	✓	✓
⊕ Engage	✓	<a href="#">See more</a>	<a href="#">See more</a>

## Account settings

### Account linking

Account Linking is a solution that provides a set of features to support customers who are split across different accounts, and allows account users to find one another across accounts on all endpoints. Large customers may have this split because of a limit of number of users per account, or business needs for having different accounts or billing.

Accounts are linked into a federation that includes:

- The ability to create accounts in multiple tiers, allowing for a mix-and-match of certain feature sets
- A consolidated company directory
- Non-metered extension-to-extension and direct number dialing support in the federation

Before setting up Account Federation:

1. Contact RingCentral support to request access to the Account Federation feature. RingCentral support will help evaluate if your account qualifies for the feature.
2. The RingCentral support agent enables the Account Federation feature and adds your linked accounts within your online account.
3. Unique extensions in the federation are preferred. If extensions are not unique, the support agent may be able to update the extension numbers of the linked account for you by applying a template.
4. When the Account Federation setup is complete, all account users can find one another across accounts on all endpoints.

**Note:** Feature not available for all accounts. Contact RingCentral support to evaluate if your account qualifies for this feature.

### Navigating the Appearance tab

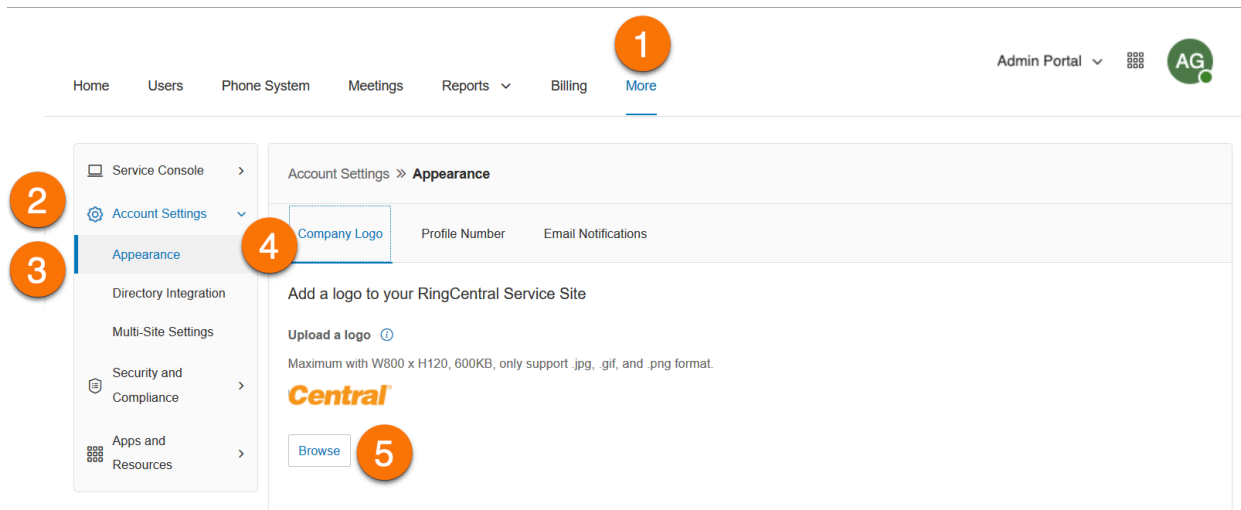
The Appearance tab allows you to add a company logo to your RingCentral account, change the phone numbers the users see in their online account profile, and customize the email notifications that you receive.

### Company logo

The company logo will appear at the top-right corner of your online account once you log in. To upload and link an image:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Appearance**.

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





## Profile number

In the profile tab, administrators have the option to choose which numbers are displayed on their user's account page.

The number format may differ depending on the country code. If a user does not have a direct number, the main number and extension will be displayed. If a user has multiple numbers, the user can click on the drop-down arrow to view these numbers. 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**.

The screenshot shows the RingCentral Admin Portal interface. At the top, the navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More (highlighted with a red circle 1). The user's name 'AG' is in the top right. On the left sidebar, 'Account Settings' (red circle 2) and 'Appearance' (red circle 3) are visible. The main content area shows 'Account Settings > Appearance' (red circle 4). Under the 'Profile Number' tab, the instruction 'Select the numbers that users will see in their profile' is followed by four radio button options: 'Direct Number and Extension (Current)' (selected, red circle 5), 'Direct Number', 'Main Number and Extension', and 'Direct Number, Main Number and Extension'. Each option has a preview of the number format. At the bottom right, there are 'Cancel' and 'Save' buttons.

## 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**.

1

Home Users Phone System Meetings Reports Billing More

Admin Portal AG

2

3

4

5

6

7

Service Console >

Account Settings >

Appearance

Directory Integration

Multi-Site Settings

Security and Compliance >

Apps and Resources >

Account Settings > Appearance

Company Logo Profile Number Email Notifications

Email Preview

Welcome

Dear new user:

Hank Hill has added you as a user to the RingCentral business phone system.

- Your company number is: (888) 555-1212
- Your extension number is: XXX
- Your direct line is: (XXX) XXX-XXX
- Your email address for login is: XXX.XXX@XXX.XX

You can set up your account online in just a matter of minutes.

[Set Up Account](#)

Or copy-and-paste this link into your browser:

<https://service.ringcentral.com/login/main.asp?FECW1320:C06F19000ED73CC40538B3E8327C04ED7A7FBB84&activation>

Logging in to RingCentral.

From the RingCentral login page, skip everything and click the **Single Sign-on** link. Then log in with your standard company credentials.

Thank you for using RingCentral.

Got Questions? The [RingCentral Support Center](#) offers startup guides, tutorial articles and videos and comprehensive search.

By subscribing to and/or using RingCentral, you acknowledge agreement to our [Terms of Use](#).

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Customize Email Notifications

Custom Logo (optional, max 350px x 60px)

Enter an image URL to customize the logo that appears in your email headers.

Message (optional, max 750 chars)

0/750 characters remaining.

Contact Email (optional)

Support Contact Phone Number (optional)

Support Website (optional)

Customize Welcome Email

☒ Include main company number (409) 240-2563

☒ Include direct number

☒ Include RingCentral Support Center information

[Reset to Default](#) [Cancel](#) [Update Preview](#) [Save](#)

## Archiver Settings

Archiver settings let admins and users control archiving independently. Super Admins and managers automatically have Archiver access, and Super Admins can turn on this feature for any user. When a user's Archiver option is turned on, they can archive the data of their own user extension.

### Enabling Archiver for Admins

Super Admins and Managers are predefined roles that have admin archiver access by default. Super Admins can create a new custom role with admin-level archiving permissions. They can turn Archiver on for Admins in **Roles** if already available or create a new custom role with Admin level archiving permissions.

1. Log into your [RingCentral account](#) as an admin.
2. Navigate to **Users** via the top bar.
3. Click on **Roles** in the side navigation bar.
4. Click on an existing role or create a new one.
5. Scroll down to the **Features** section and check the box next to **Archiver for Admins**.
6. Click **Save**.

Create New Role

✓ Select Role   ✓ Describe Role   **3 Permissions**

Select permissions to be assigned to new role

☒ General ^

☒ Overview, Messages, Contacts, Standard User Tools

☒ Policies v

☐ User Settings v

☐ Company Settings v

☐ Multi-Sites v

☐ Phone System v

☐ User Management v

☐ Analytics v

☐ Billing v

☒ Features ^

☒ Archiver For Admins

☐ Audit Trail

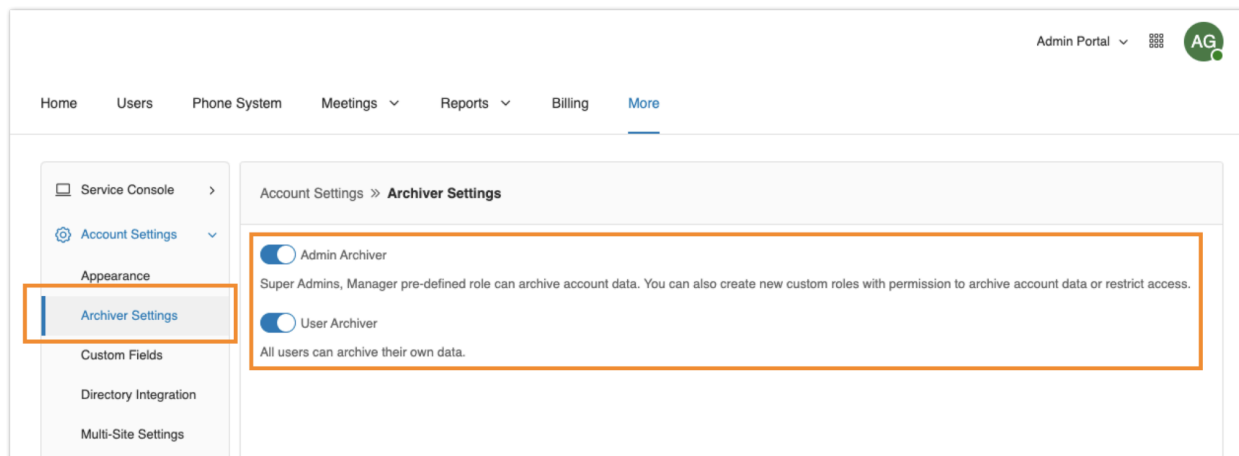
☐ Business SMS

☐ Configure Delegates

## Enabling access for users

Super Admins and Managers can archive data for all; or enable users to archive their own data.

1. Log into your RingCentral account.
2. From the Admin portal (or My Extension for managers), go to **More** from the top navigation tabs.
3. Click on **Archiver Settings** in the left navigation bar.
4. Use the slider to enable archiver.



## Directory integration

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

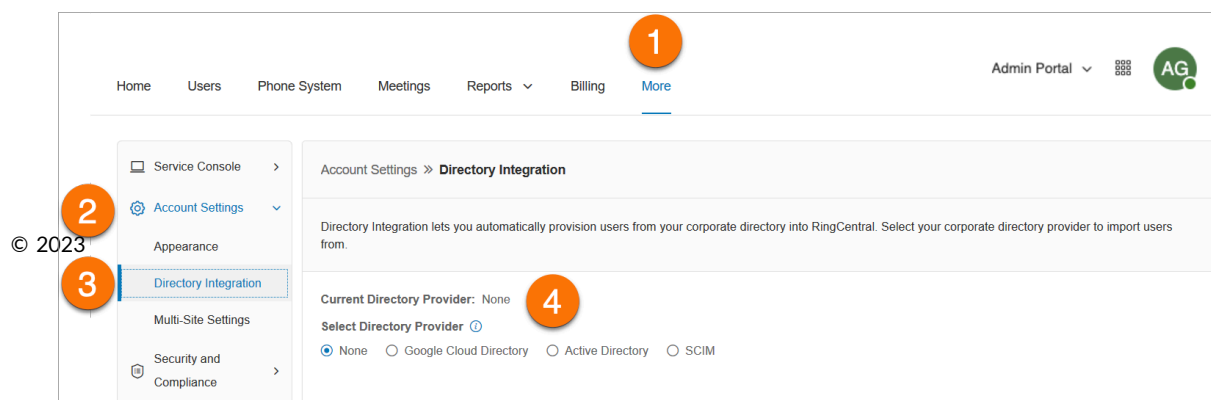
### Active Directory

RingCentral integrates with Microsoft Active Directory to let you automatically provision users from Active Directory to RingCentral.

The service leverages Okta so you can perform an initial import from Active Directory to RingCentral, and to synchronize Active Directory and RingCentral on user status. Users are automatically enabled or disabled in RingCentral as they join or move around your organization.

To set up the RingCentral directory integration service, follow these steps:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Directory Integration**.
4. Select from the following Directory Provider:
  - None
  - Google Cloud Directory
  - Active Directory
  - SCIM
5. Enable your selected directory by following the steps provided.
6. If required, edit the extensions of provisioned users in User Management in the Admin Portal.



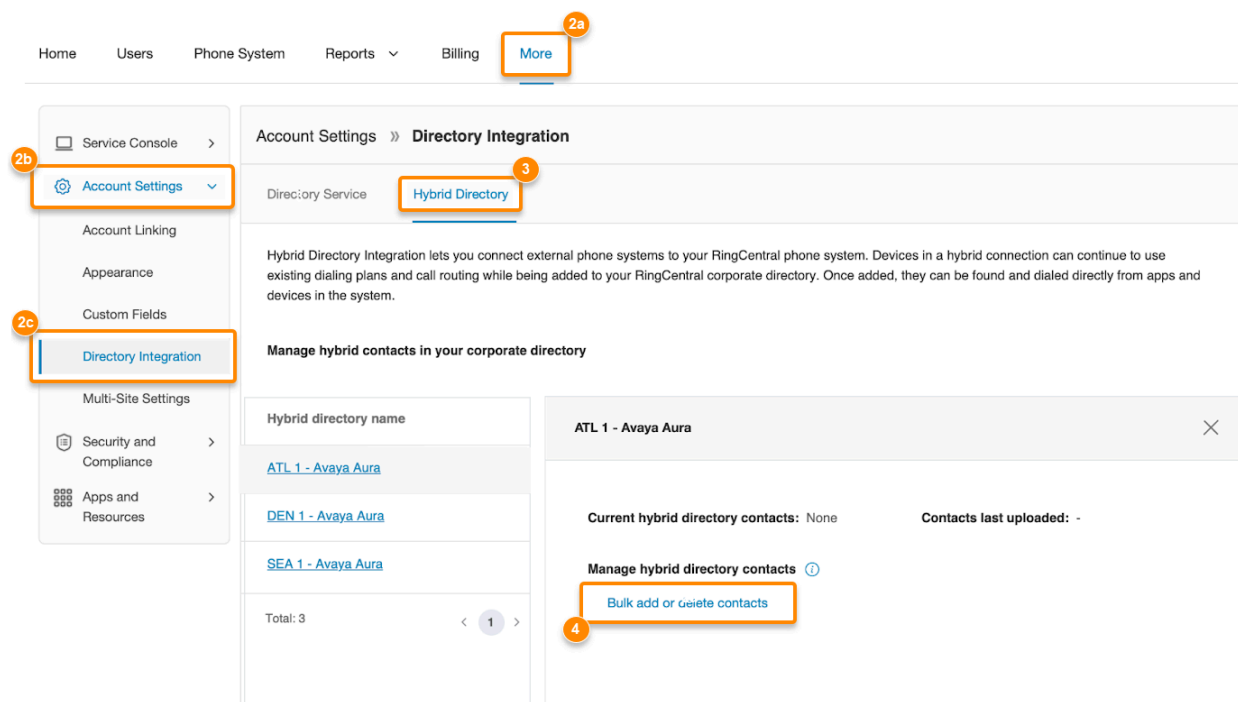
## Cloud Connector

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**.

Bulk add or delete contacts

To edit the contacts in the hybrid corporate directory, download the template or email it to yourself. Edit the template to add or delete contacts in your directory. Once ready, return here to upload the updated file.

**Step 1: Get current contact list**

Send email to

Send or Download

**Step 2: Add or delete contacts from the list**

**Step 3: Upload the updated file**

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.

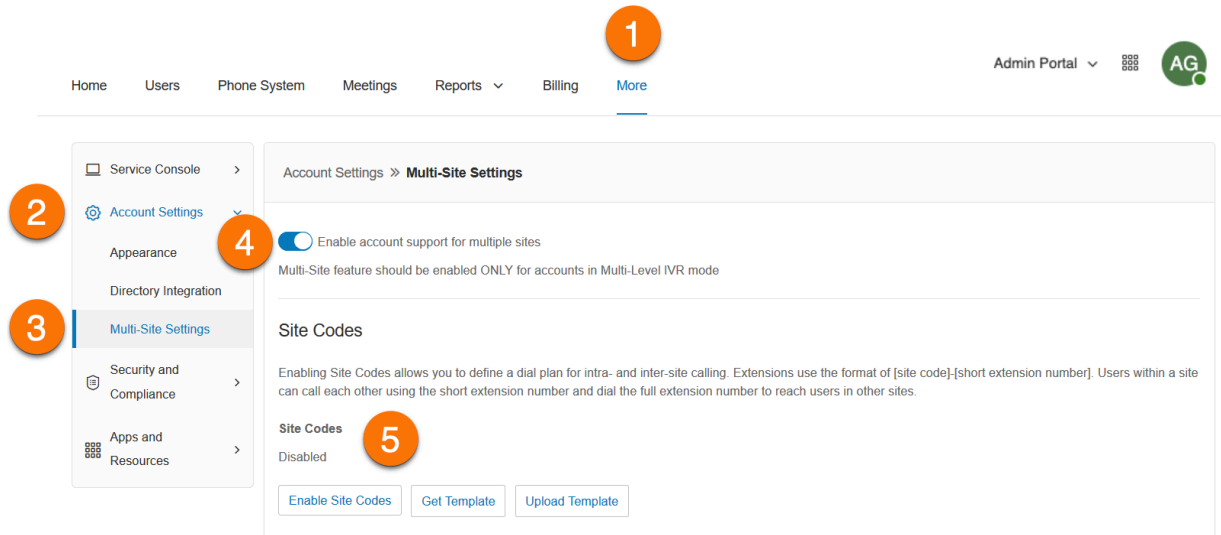
To enable your account to support multiple sites:

1. Click the **More** tab from the **Admin Portal**.



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

Your online account can now create and configure multiple sites. Site filters are available on pages with site assets to allow you to view the list of assets by sites.



## Creating a new site

RingCentral Multi-Site support allows you to provision independent account configurations for your individual sites, to enable you to uniquely register and manage each site from your account. Once Multi-Site Support is enabled, you can create additional sites as needed.

To create a site, follow the steps below:

1. Click the **Phone System** tab from the **Admin Portal**.
2. On the **Company Info** page, click **New Site**.
3. On the **Site Info** page, enter the **Site Name**, **Site Address**, and **Site Extension**. Or, you may click **Select Site** under **Copy Settings from** to copy settings from another site. Click **Next**.
4. Configure the Regional Settings and Business hours. Click **Next**.
5. Assign Numbers to the Site. You may assign existing numbers or add (and purchase) new direct numbers. Click **Next**.
6. On the Caller ID Name page, enter the **Outbound Caller ID Name**.
7. On the IVR Menu page, select an **Existing IVR** or a **New IVR**.

On the Summary page, you will be notified that the site is created successfully. Click **Done**. You can view or edit site information within **Phone System > Company Info**.

**New Site** 6

✓ Site Info ✓ Site Settings ✓ Number(s) 4 Caller ID Name 5 IVR Menu 6 Summary

This name along with the phone number will be displayed to the called party whenever an outbound call is made using the local number as the caller ID. Max 15 characters. Note: Does not apply to toll-free numbers.

Enter the name you want the caller ID to be displayed for this site. If skipped, site's caller ID name will be set to be the same as company's caller ID name.

Outbound Caller ID Name

**New Site** 7

✓ Site Info ✓ Site Settings ✓ Number(s) ✓ Caller ID Name 5 IVR Menu 6 Summary

Please assign Existing or New IVR

Existing IVR New IVR

Search

Select	Name	Numbers	Ext.	Language
<input type="radio"/>	IVR Menu 1001		1001	English (U.S.)
<input type="radio"/>	IVR Menu 1002		1002	English (U.S.)
<input type="radio"/>	IVR Menu 1003		1003	English (U.S.)

Total: 3

**New Site** 8

✓ Site Info ✓ Site Settings ✓ Number(s) ✓ Caller ID Name ✓ IVR Menu 6 Summary

The new site is created successfully. You can now create or assign users, phone numbers and devices to the site. Site information can be viewed and edited later within Phone System > Company

Done

## 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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Account Settings

Appearance

Directory Integration

Multi-Site Settings

Security and Compliance

Apps and Resources

3

Account Settings » Multi-Site Settings

4

Enable account support for multiple sites

Multi-Site feature should be enabled ONLY for accounts in Multi-Level IVR mode

Site Codes

Enabling Site Codes allows you to define a dial plan for intra- and inter-site calling. Extensions use the format of [site code]-[short extension number]. Users within a site can call each other using the short extension number and dial the full extension number to reach users in other sites.

Site Codes

Disabled

Enable Site Codes Get Template Upload Template

5

Site Codes

1 Extension Number Length 2 Provision Site Codes 3 Adjust Extension Numbers

Max Extension Length: 5

Site Code Length

2

Short Extension Number Length

3

Cancel Next

6

Site Codes

✓ Extension Number Length 2 Provision Site Codes 3 Adjust Extension Numbers

When Site Codes are enabled, the specified Site Code will be added to the beginning of existing extension numbers assigned to the site.

Site Name	Site Code	Short Site Ext. Number	Full Site Ext. Number
Company	11		
Office	12	0	12000

Total: 2 Show: 25 < 1 > Back Next

7

Site Codes

✓ Extension Number Length ✓ Provision Site Codes 3 Adjust Extension Numbers

When Site Codes are enabled, the specified Site Code will be added to the beginning of existing extension numbers assigned to the site.

4 of 7 extensions have no conflicts and will be re-numbered.

We have detected 3 of 7 extensions have conflicts. Specify a new Short Ext. Number to resolve the conflicts before continuing.

Ext. Name	Target Site	Site Code	Ext. Number with Site ...	Type of Conflict	New Short Ext. ...	New Full Ext. ...
IVR Menu 1001	Company	11	111001		3	11003
IVR Menu 1002	Company	11	111002		4	11004
IVR Menu 1003	Company	11	111003		5	11005

Total: 3 Show: 25 < 1 > Back Confirm

## Moving assets across sites

The Change Site function of Multi-Site Support allows you to move selected Users, IVR Menus, and Call Queues to another site. This feature allows for individual or bulk movement of Users, IVR Menus, and Call Queues between sites.

### Moving users across sites

1. Click the **Users** tab from the **Admin Portal**.
2. On the **Users with Extensions** tab, check the box of the users you want to assign to a different site, and click **Change Site**.
3. Select the site.
4. You may check the option to **Adjust time and regional settings to the settings of the new site?** to apply it to the moved users.
5. Click **Change Site**.

The screenshot displays the RingCentral Admin Portal interface. The sidebar on the left has the 'Users' tab selected, indicated by a blue circle with the number 1. The main content area shows the 'Users with Extensions' tab. A table lists users, with 'Joe Hall' selected (checked box). A 'Change Site' button is visible, highlighted with a blue circle and the number 2. A modal window titled 'Select Site' is open, showing a search bar, a 'Select Site' dropdown menu with 'Company' selected (highlighted with a blue circle and the number 3), and a checkbox labeled 'Adjust time and regional settings to the settings of the new site?' (highlighted with a blue circle and the number 4). The modal also shows 'Total: 2' and 'Show: 25' options. At the bottom of the modal are 'Cancel' and 'Change Site' buttons, with the 'Change Site' button highlighted by a blue circle and the number 5.

## Moving IVR menus across sites

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto Receptionist**.
3. Click **IVR Menus**.
4. Select from the list of IVR Menus.
5. Click **Change Site**.
6. Select the site.
7. Click **Change Site**.

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

**Top Navigation Bar:** Includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. The Admin Portal dropdown and a user profile icon are also present.

**Left Sidebar:** Contains a list of settings categories: Company Info, Phone Numbers, Auto-Receptionist (highlighted with a red circle 2), General Settings, IVR Menus (highlighted with a red circle 3), IVR Editor, Prompts Library, Groups, and Phones & Devices.

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

**IVR Menus Table:** A table with columns: Name, Numbers, Ext., Language, Site, and Actions. It lists three IVR menus:
 

Name	Numbers	Ext.	Language	Site	Actions
<a href="#">IVR Menu 1001</a>		11003	English (U.S.)	Company	<a href="#">⋮</a>
<a href="#">IVR Menu 1002</a>		11004	English (U.S.)	Company	<a href="#">⋮</a>
<a href="#">IVR Menu 1003</a>		11005	English (U.S.)	Company	<a href="#">⋮</a>

 The 'Change Site' link (highlighted with a red circle 4) is located above the table.

**Select Site Modal:** A modal window titled 'Select Site' is open. It contains a note: "NOTE: When being moved to another site, the extension will get the new site code from its target site." Below the note is a search bar. A 'Select Site' dropdown menu is shown with two options: 'Company' (selected, highlighted with a red circle 6) and 'Office'. At the bottom, it shows 'Total: 2' and a 'Show: 25' dropdown (highlighted with a red circle 7). Buttons for 'Cancel' and 'Change Site' are at the bottom right.

## Moving call queues across sites

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select the Call Queues that you want to move.
5. Click **Change Site**.
6. You may check the option to **Adjust time and regional settings to the settings of the new site?** to apply it to the moved Call Queue.
7. Click **Change Site**.

The screenshot displays the RingCentral Admin Portal interface. At the top, the navigation bar includes 'Home', 'Users', 'Phone System' (selected), 'Meetings', 'Reports', 'Billing', and 'More'. The right side of the top bar shows 'Admin Portal' and a user profile icon. The left sidebar contains a list of options: 'Company Info', 'Phone Numbers', 'Auto-Receptionist', 'Groups' (selected), 'Call Queues' (highlighted), 'Paging Only', 'Shared Lines', and 'Park Locations'. The main content area is titled 'Groups > Call Queues' and includes a description, a search bar, a 'Sites' dropdown, and a '+ New Call Queue' button. Below this is a 'Change Site' button and a table of call queues. The table has columns for 'Status', 'Name', 'Site', 'Numbers', 'Ext.', 'Msg.', 'Members Availability', and 'Actions'. Two call queues are listed: 'Call Queue Test' and 'Call Queues Test Two', both associated with the 'Company' site. Orange callouts are placed over the interface to guide the user: '1' is over the 'Phone System' tab, '2' is over the 'Groups' sidebar item, '3' is over the 'Call Queues' sidebar item, and '4' is over the 'Change Site' button.

Status	Name	Site	Numbers	Ext.	Msg.	Members Availability	Actions
<input checked="" type="checkbox"/>	<a href="#">Call Queue Test</a>	Company		11001	0 / 0	1 / 0	<a href="#">⋮</a>   <a href="#">▼</a>
<input type="checkbox"/>	<a href="#">Call Queues Test Two</a>	Company		11002	0 / 0	1 / 0	<a href="#">⋮</a>   <a href="#">▼</a>

## Security and compliance

### Single sign-on

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

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

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

### Configuring SSO

1. Click the **More** tab from the **Admin Portal**.
2. On the left-hand side, click **Security and Compliance**.
3. Click **Single Sign-on**.
4. Choose an option to set up SSO:
  - **Set up SSO by yourself:** Use the self-service UI to configure the Service Provider (SP) settings. Perform the steps in Set up Single Sign-On by Yourself .
  - **Contact Customer Support:** Use RingCentral Customer Support to configure the Service Provider (SP) settings. Click the **View Detail** link, and contact RingCentral support.
5. After configuring the SSO, you can turn on the SSO service for your company. To do so, check the box next to **Enable SSO Service**.



Home Users Phone System Meetings Reports Billing More

Admin Portal AG

Service Console

Audit Trail

Service Status

Account Settings

Security and Compliance

Single Sign-on

Session Timeout

Hot Desk Session Timeout

Masked Numbers

Trust Portal

Apps and Resources

Security and Compliance >> Single Sign-on

RingCentral Single Sign-on (SSO) service lets your company authenticate your RingCentral users through your company-level network login credentials. About RingCentral SSO service. [View guide](#)

For the first time setup, please finish the configuration in order to turn on SSO for your company.

SSO Configuration

Choose one of the options below to set up SSO for your company.

**Set up SSO by yourself**

Step 1: Upload identity provider metadata file and certificate.

[Set Up](#)

Step 2: Export Service Provider metadata and import it into your Federation Server. Please use <https://sso.ringcentral.com> as your Audience URI and SP entity ID when it's requested by your federation server.

[Download](#)

**Contact Customer Support**

[Customer support number](#)

Contact RingCentral customer support to set up SSO

[View Detail](#)

**Enable SSO**

Please finish the configuration in order to turn on SSO for your company.

☐ Enable SSO Service

Identity Provider Entity ID

SSO unique ID

None

None

Save

## Setting up single sign-on by yourself

To set up SSO by yourself, upload your Identity Provider (IDP) SAML metadata, make sure the attribute is mapped correctly, and download the metadata for importing it into your Federation Server:

1. In the Set up SSO by yourself box, click **Set Up** to set up SSO for the first time, or **Edit** to change your configuration.
2. Under Upload IDP metadata, click drop down and select either Upload with file or URL. To upload with a file, click **Browse**, select a file, and click **Open**. To upload with a URL, paste the URL and click **Import**.
3. Select email attributes you want to use within your metadata from the drop down list under **Map Email Attribute to**. If the email attribute is not recognized, type out the name of the attribute by clicking Custom in dropdown.
4. Under **Certificate Management**, click **Upload** to upload a certificate and set the primary one. Click **Save**.
5. Download the Service Provider metadata and import it into your IDP server to complete the configuration on your IDP side.
6. Tick **Enable SSO Service** checkbox.
7. Click **Save**.

SSO Configuration

Choose one of the options below to set up SSO for your company.

**Set up SSO by yourself**

Step 1: Upload identity provider metadata file and certificate.

**1** Set Up

Step 2: Export Service Provider metadata and import it into your Federation Server.

**5** Download

**2**

Upload IDP metadata

Please upload a valid SAML metadata file.

Upload Metadata by

Upload with file

Browse

SSO General Information

Identity Provider Entity ID	Connection Protocol
None	SAML 2.0
Connection Type	Browser SSO SAML Profile
Browser SSO	IDP-initiated SSO and SP-initiated SSO
SAML Bindings	
None	

**3**

Attribute Mapping

Please make sure the email attribute is mapped to the correct value in the metadata.

Map Email Attribute to

None

**4**

Certificate Management

Please upload certificate and set the primary one.

Upload

Order	Subject DN	Signature Algorithm	Expires
No result. Please upload metadata file first.			

Cancel Save

**6**

Enable SSO

☒ Enable SSO Service

Identity Provider Entity ID

http://www.okta.com/tgeuighTGEfjd

☐ Allow users to log in with SSO or RingCentral credential

SSO unique ID

Email

**7**

Save

## Contacting support to enable SSO

This section describes how to prepare the request, and contact RingCentral Customer Support to configure the Service Provider (SP) settings required to enable SSO on your IDP server:

1. In the Contact Customer Support box click the **View Detail** link, and perform the steps as described.
2. Get your SAML 2.0 metadata details from your Identity Provider (IDP), such as PingFederate, Okta, or a homegrown IDP.
3. Contact [RingCentral Customer Support](#) to request Single Sign-on setup assistance. A support member will ask for your SAML 2.0 metadata file and answer your Single Sign-On questions.
4. You will receive an email from RingCentral containing your SAML 2.0 SP metadata. Import the metadata into your IDP server to complete the configuration on your IDP.
5. Check **Enable SSO Service**.
6. Click **Save**.

SSO Configuration

Choose one of the options below to set up SSO for your company.

Set up SSO by yourself

Step 1: Upload identity provider metadata file and certificate.

Set Up

Step 2: Export Service Provider metadata and import it into your Federation Server.

Download

Contact Customer Support

Customer support number

1 Contact RingCentral customer support to set up SSO

View Detail

Contact Support to Enable SSO

Please follow the steps below for the request.

2 Step 1. Prepare IDP SAML 2.0 metadata

To set up SSO, we need your SAML 2.0 metadata details from an Identity Provider (IDP), like PingFederate, Okta, or a homegrown IDP.

SAML 2.0 Reference

Sample SAML 2.0 metadata

3 Step 2. Call RingCentral Customer Support

Call RingCentral Customer Support and request Single Sign-on setup assistance.

A Support member will ask for your SAML 2.0 metadata file and answer your Single Sign-on questions.

Find your RingCentral customer support number

4 Step 3. Import SAML 2.0 Service Provider (SP) metadata

You will receive an email from RingCentral Customer Support containing SAML 2.0 SP metadata. You need to import this data into your Federation Server.

5 OK

Enable SSO

☒ Enable SSO Service

Identity Provider Entity ID

http://www.okta.com/fgeuighTGEfjdn

SSO unique ID

Email

☐ Allow users to log in with SSO or RingCentral credential

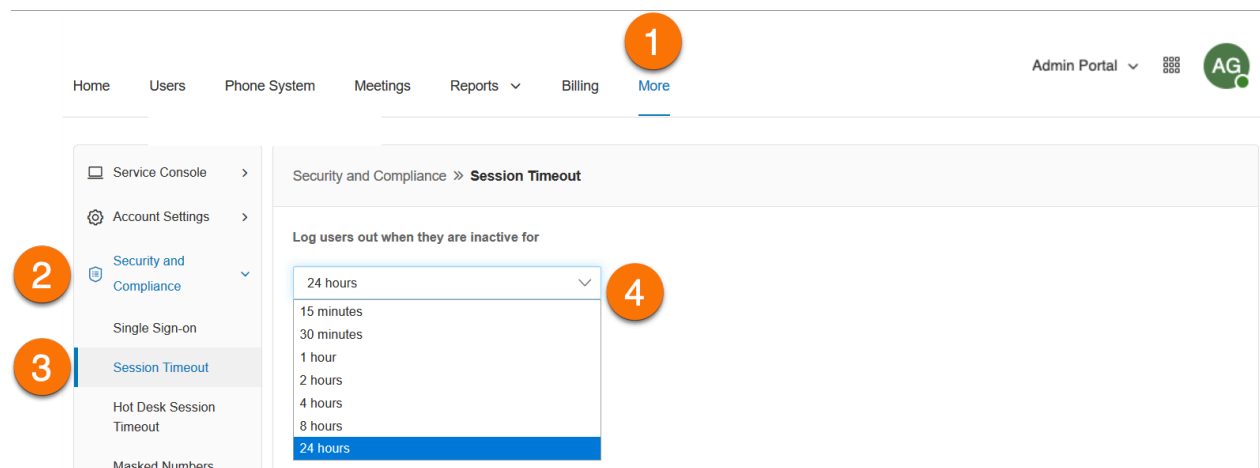
6 Save

## Configuring session timeout

Configure a session timeout for all users on your account. If a user is inactive for a certain period of time, a warning message will appear notifying the user that the session is about to expire. The user can click **OK** to keep the session alive. However, if a user does not click **OK** before the time runs out, the user is logged out of the system and is asked to log in again.

To set a time interval for your phone system's session timeout:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Security and Compliance**.
3. Click **Session Timeout**.
4. Click the drop-down to view a list of time intervals.
5. Select the time interval you would like to use.
6. Click **Save**.

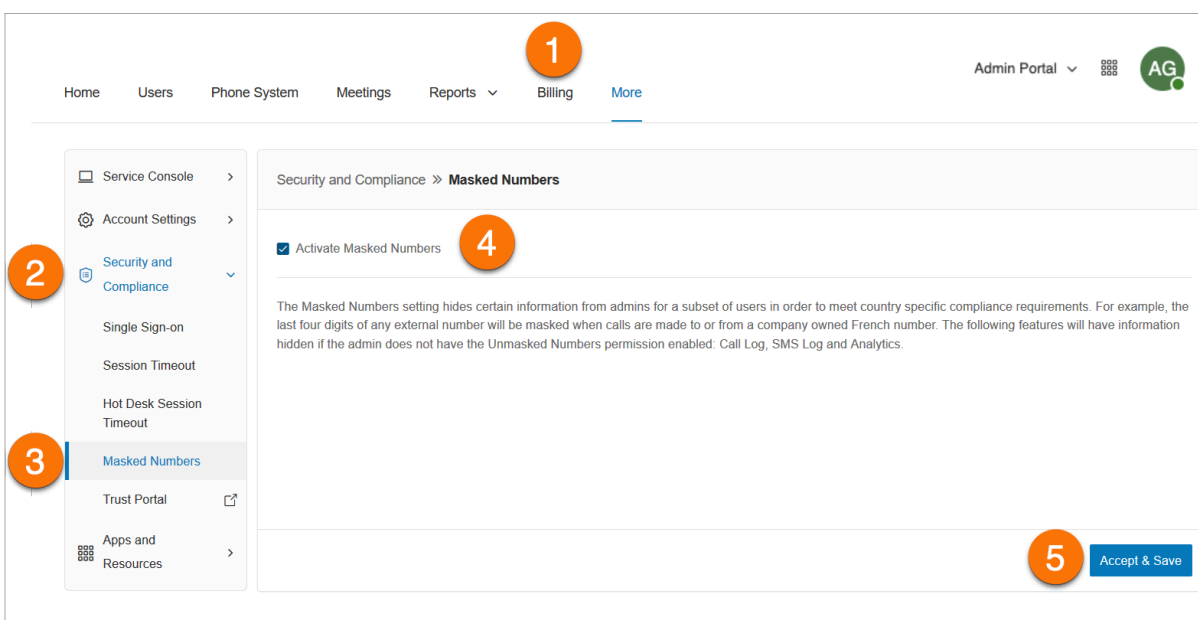


## Enabling masked numbers

The Masked Numbers setting hides certain information from Administrators for a subset of users in order to meet country-specific compliance requirements. This feature needs to be activated first before the Unmasked Numbers permission can be accessed in Roles. Administrators with the Super Admin role will automatically have the Unmasked Numbers permission enabled.

To enable Masked Numbers:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Security and Compliance**.
3. Click **Masked Numbers**.
4. Check **Activate Masked Numbers**.
5. Click **Accept & Save**.
6. Click **OK** on the **Alert** dialog.
7. At this point, you can either create a role with the Unmasked Numbers permission enabled, or you can enable the Unmasked Numbers for a role.

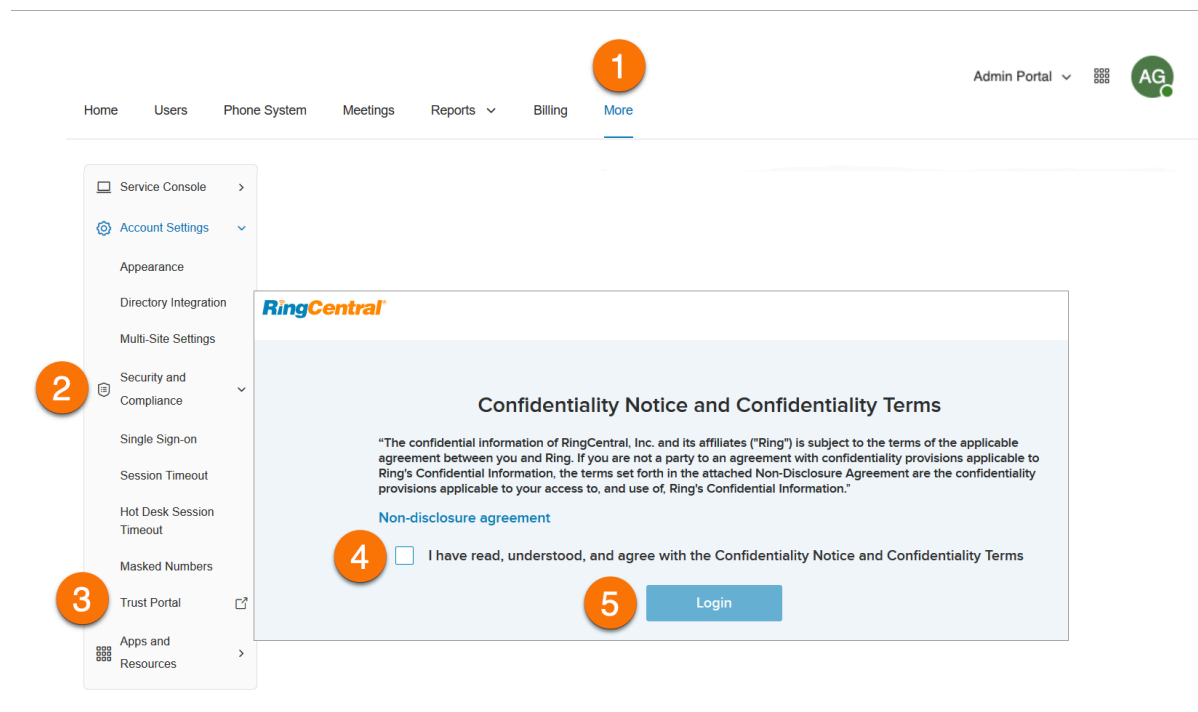


## Accessing the Trust Portal

All current RingCentral 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) on the 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.

The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The left sidebar contains a menu with options like Company Info, Phone Numbers (selected), All Numbers, Numbers in Use, Number Inventory, Transferred and Vanity, Auto-Receptionist, Groups, Phones & Devices, and Emergency Calling. The main content area is titled 'Phone Numbers >> All Numbers' and displays a list of phone numbers. The first number, (454) 854-9978, is selected with a checkbox. The table columns are: Number, Name, Assigned to, Ext, Site, Location, Capability, Type, and Number block. The first row shows the selected number assigned to 'Auto-Receptionist' with extension 292, located at 'Company' in 'United States', with capabilities for 'Substitute Call...'. The second row shows the same number assigned to 'Auto-Receptionist' with extension 292, located at 'Company' in 'United States', with capabilities for 'Softphone' and 'New block'. The third row shows the same number assigned to 'Auto-Receptionist' with extension 292, located at 'Company' in 'United States', with capabilities for 'Softphone' and 'New block'. The fourth row shows the same number assigned to 'Auto-Receptionist' with extension 292, located at 'Company' in 'United States', with capabilities for 'Softphone'. The bottom of the page shows a total of 94 numbers and a 'Show: 25' dropdown menu.

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

Download CSR for porting out

To transfer your US or Canada phone number(s) from RingCentral to another carrier, you need to have a formal port-out request to be initiated by your new carrier. The number(s) need to be active with RingCentral before you can make this request.

In order to get you prepared for the request, we put together information you may need as a PDF file. Select site first, and then click "Download" to view it.

Site

All

☐ All

☐ Company

☐ Site 1

☐ Site 2



## 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.

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

A left-hand sidebar (2) contains a list of navigation items: Service Console, Account Settings, Security and Compliance, Apps and Resources (3), Archiver Beta (3), App Gallery, and Developer Portal. The 'Apps and Resources' item is expanded, showing the 'Archiver Beta' sub-item selected.

The main content area is titled 'Apps and Resources » Archiver Beta'. It features three tabs: Accounts, Sync Options, and Phone. The 'Accounts' tab is active, displaying a section titled 'Select Account To Connect' (4). Below this, there is a list of services: Dropbox, SFTP, Google Drive, and Box. Each service is marked as 'Not connected' and has a 'Connect' button next to it.

Below the 'Accounts' tab, the 'Sync Options' tab (5) is active. It shows a section titled 'Data to backup' (6) with a list of items: Call Recordings, Voice Mails (7), SMS, and FAX. Each item has a checkbox that is currently checked. To the right of this list is a toggle switch labeled 'Enable Backup'.

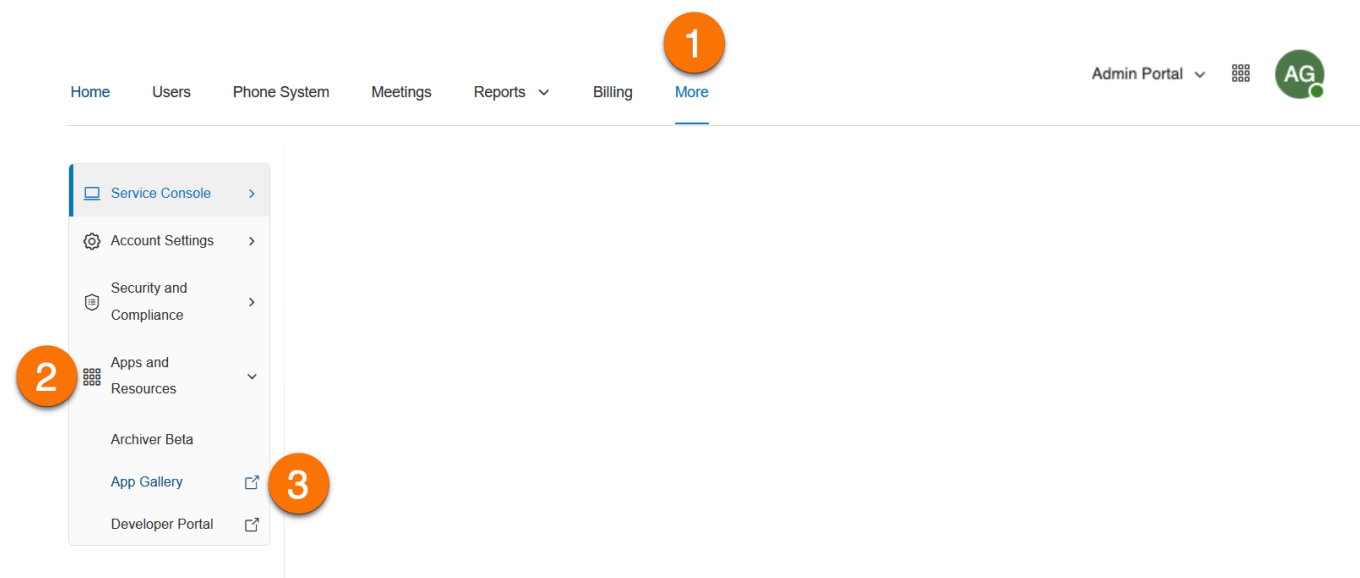
## App Gallery

The App Gallery is a destination where you can discover application integrations that are commercially available, and where developers can showcase their integrations.

To access the App Gallery via the online account:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Apps and Resources**.
3. Click **App Gallery**.

A new window will open to the [RingCentral App Gallery](#) website.



## Developer Portal

The RingCentral Developer Portal offers a set of tools and services to build, deploy, and manage custom integrations using RingCentral APIs. With this, developers can build out-of-the-box integrations with RingCentral to add powerful communication capabilities to business applications.

To access the Developer Portal via the RingCentral online account:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Apps and Resources**.
3. Click **Developer Portal**.
4. A new window will open to the [Developer Portal](#).

# SMS and MMS

There are two types of SMS:

- **Person-to-Person (P2P) or standard SMS:** Communication of two or more people over text messaging. Sending text messages from your phone to another person's phone is an example of P2P.
- **Application-to-Person (A2P) or High Volume SMS:** A text message that a person receives from an application. This includes, but not limited to, marketing messages, appointment reminders, chat bots, virtual assistants, notifications, and one-time passwords (OTPs), or PIN codes.

Wireless carriers treat P2P and A2P differently in terms of the type and volume of traffic allowed.

## Standard SMS and MMS

RingCentral 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.

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.

## High Volume SMS

Send targeted or bulk SMS campaigns using our [programmable 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.