

RingCentral MVP™

Admin Guide

V22.1



CONTENTS

Overview	10
Introduction	10
Accessing your account	10
Admin homepage	14
Admin Portal	14
My Extension	16
Enterprise Portal	17
Enabling Enterprise Portal	17
Accessing Enterprise Portal	17
Searching for accounts	17
Adding admins to federated accounts	18
Managing Enterprise admins	18
Product help	19
Audio conference	20
Launching the conferencing app	20
Conference commands	21
RingOut	22
FaxOut	22
Home tab	23
Managing users	25
Viewing users with extensions	25
Customizing columns in Users with Extensions list	26
Viewing unassigned extensions	26
Adding users with devices	28
Setting up users	31
Sending invite to a user	31
Activating by assigning credentials to a user	31
Activating user at a later time	32
Adding free users (without a device and a number)	32
Setting up free users	34
Sending invite to a user	34
Activating by assigning credentials to a user	34
Activating user at a later time	35
Deleting users and reassigning phone numbers	36
Resetting and assigning a user	37
Copying and assigning existing user settings using an unassigned extension	39
Exporting a user list	41
Editing user information in bulk	42
Converting a virtual extension to a digital line	42

Managing User Settings	43
User details	44
Managing single sign-on policy	44
Phones & Numbers	46
Primary Number	47
Screening, Greeting & Hold Music	48
Call Forwarding and Voicemail	49
Outbound Calls/Faxes	50
Outbound Caller ID	50
Outbound Fax settings	51
Bulk adding or editing users	52
Setting up users	52
Activating by assigning credentials to a user	53
Managing roles and permissions	54
Predefined roles	54
Custom roles	54
Assigning users to a role	54
Modifying a user's role	56
Creating a new role	57
Setting a default role	58
Managing user groups	59
Creating a user group	60
Editing or deleting a user group	62
Managing templates	63
Creating a template for user settings	63
Creating a template for Call Handling settings	73
Applying a template to users	74
Applying a template via Users List	74
Applying a template via User Settings under Templates	75
Applying a template via User Details	75
Managing the Phone System	76
Company Info	77
Managing Sites with Multi-Site Support	77
Company address	78
Caller ID Name	79
Directory Assistance	80
Phone Numbers	82
Adding company numbers	83
Adding assigned numbers	84
Forwarding a number	86

Naming phone numbers	88
Viewing unassigned numbers	89
Viewing transferred and vanity numbers	92
Auto-Receptionist	93
Company business hours	95
Company call handling	96
Company greeting	96
Regional Settings	99
Dial-by-name directory	101
Operator extension	102
Zero dialing	102
Name or label definitions	104
On-demand call recording	105
Choosing an on-demand call recording announcement	105
Enabling on-demand call recording announcement	107
Interactive Voice Response (IVR)	108
Multi-level IVR options	108
Single-location IVR example	108
Multiple-location IVR example	108
Switching to multi-level IVR mode	109
Managing general IVR settings	110
IVR Editor	112
IVR menus	113
Adding an IVR menu group	113
Configuring an IVR menu	113
Configuring extension info	114
Adding Key Presses	115
Adding a direct number	117
Visual IVR Editor	117
Creating a new IVR menu or open an existing IVR menu	118
Editing an existing IVR menu with the visual IVR editor	121
Prompt recordings	121
Recording an audio prompt	122
Selecting audio prompt mode	122
Selecting text-to-speech prompt mode	124
Importing or exporting XML files	125
Downloading a sample XML file	125
Exporting an XML file	126
Importing an XML file	126
Recording greetings and messages	127
Importing a WAV file for your IVR prompt	127

Recording a prompt over the phone	128
Recording a prompt using your computer microphone	129
Company custom rules	130
Creating a custom rule	130
Custom answering rule conditions	132
Custom rule condition - Caller ID	132
Custom rule condition - Called Number	133
Custom rule condition - Date and/or Time	134
Custom answering rule call handling actions	136
Custom answering rule list	136
Call groups	136
Call queues	137
Adding a call queue group	138
Configuring a call queue	140
Configuring call queue-to-queue overflow	142
Adding a direct number	144
Setting call queue greeting and hold music	145
Incoming call handling	146
Messages and notifications	148
Setting a voicemail greeting	148
Setting message recipients	150
Setting voicemail-to-text transcription	151
Setting notifications	151
Paging only groups	152
Adding a paging only group	154
Configuring a paging only group	155
Shared line groups	157
Adding a shared line group	157
Configuring a shared line group	158
Adding a direct number	158
Setting a greeting	159
Managing blocked calls	159
Setting custom music on hold	160
Managing call handling	160
Managing outbound caller ID	161
Messages and notifications	161
Setting up voicemail greeting	161
Setting a message recipient	163
Setting voicemail-to-text	164
Setting notifications	164

Park location groups	165
Adding a park location	165
Configuring a park location	165
Adding members to a park location	167
Setting up presence appearance	167
Call monitoring groups	169
Adding and configuring a call monitoring group	170
Directed call pickup	170
Adding a call pickup group	172
Message-only extensions	174
Adding a message-only extension	174
Configuring a message-only extension	175
Managing extension details	175
Recording an extension name	177
Adding a direct number	179
Designating a message recipient	180
Setting a voicemail greeting	181
Setting voicemail-to-text	183
Setting notifications	183
Announcement-only extensions	186
Adding an announcement-only extension	186
Editing announcement-only extension details	187
Adding a direct number	189
Setting an announcement	190
Limited extensions	192
Adding a limited extension	192
Assigning a limited extension	193
Editing limited extension info	194
Recording an extension name	198
Adding a direct number	200
Setting an announcement and enabling hold music	202
Setting outbound caller ID	204
Phones and Devices	206
Viewing and editing devices	206
Searching devices	206
Adding a device	207
Adding a user phone	207
Adding a common area phone	209

Adding a paging device	210
Changing a phone	211
Reassigning a phone	212
Viewing shared lines	212
Adding an unassigned phone	213
Enabling video calls	215
Common area phones	216
Types of hot desk phones	217
Phone support and setup	217
Using hot desking for limited extension	217
Enabling a limited extension phone for hot desking	218
Converting an unassigned phone to a hot desk phone	218
Unassigning a hot desk phone	218
Logging out a hot desk phone	219
Setting the hot desking session timeout	220
Assisted provisioning	221
Automatic Location Updates	221
Setting up emergency response location	222
Automatic location updates for RingCentral app for desktop	223
Automatic location updates for compatible desk phones	223
Prerequisites:	223
Enabling automatic location updates of compatible desk phones	223
Setting up the network infrastructure with known locations	224
Adding wireless access point to the wireless access point map	224
Adding an IP address range to the IP address range map	224
Adding an ethernet switch to switch map	224
Selecting a User extension to be treated as nomadic	225
Meetings	225
Accessing and managing Rooms	226
Managing Meetings settings	226
Call log reports	228
Downloading call log and recorded calls	229
Analytics	229
Adoptions and usage	232
Company numbers reports	233
Performance reports	234
Quality of Service reports	236
Rooms and Devices reports	236
Creating analytics alerts	237

Creating report subscriptions	239
Billing	239
Overview page	241
Managing your service plan	241
Viewing/changing service plan	242
Canceling your service plan	243
Using auto purchase	244
Viewing your Service Billing Detail	245
Viewing your Billing History	246
Licenses & Inventory	248
Managing licenses	248
Viewing your usage	249
Viewing mobile user history	250
Adding calling credits bundles	252
Managing Calling Rates	253
Enabling international calling and SMS	253
Viewing inbound rates	253
Viewing premium rates	254
Managing Purchases in the Billing tab	255
Using the Shopping cart to check out	257
Managing meetings in the Billing tab	261
RingCentral Rooms licenses	261
Adding a Rooms license	261
Managing device orders	261
Using the Cost Center Management feature	265
Adding Cost Center codes	265
More	266
Service console	267
Using the Audit Trail feature	268
Accessing the Audit Trail feature	269
Audit Trail report details	269
Search Capability	269
Searching by Change	270
Searching by Items Affected	270
Downloading an Audit Trail report	270
Service Status	271
Account settings	272
Account linking	274
Navigating the Appearance tab	274
Company logo	274

Profile number	275
Customizing welcome email	277
Archiver Settings	277
Enabling Archiver for Admins	279
Enabling access for users	280
Directory integration	280
Active Directory	280
Multi-site settings	281
Creating a new site	282
Setting up site codes	283
Moving assets across sites	284
Moving users across sites	286
Moving IVR menus across sites	287
Moving call queues across sites	288
Security and compliance	289
Single sign-on	289
Configuring SSO	289
Setting up single sign-on by yourself	291
Contacting support to enable SSO	292
Configuring session timeout	293
Enabling masked numbers	294
Accessing the Trust Portal	294
Apps and resources	295
Archiver	295
App Gallery	296
Developer Portal	298
Standard SMS and MMS	299
Business SMS and MMS	299
Group SMS	299
Sending a group SMS	299
Bulk SMS	300
Sending a bulk SMS	300
High Volume SMS	300
High Volume SMS features	300
API vs High Volume SMS app	301
Availability and pricing	301
Getting Started	301

Overview

Introduction

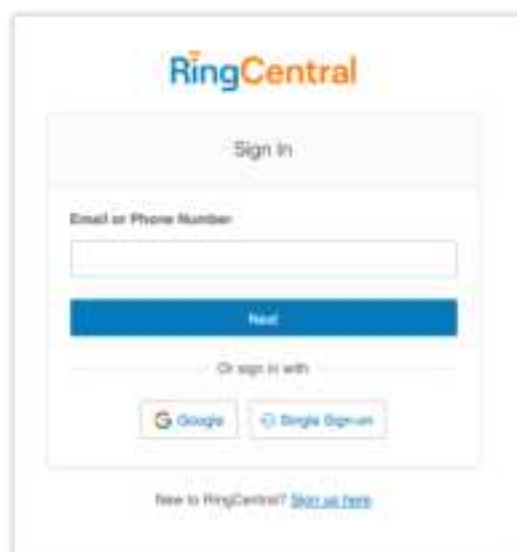
RingCentral is a cloud communications system that delivers unified team messaging, collaboration, and video meetings, coupled with unified voice, fax, and text for businesses of all sizes.

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

Accessing your account

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

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



Unified Login

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

Email or Google as user ID

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

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

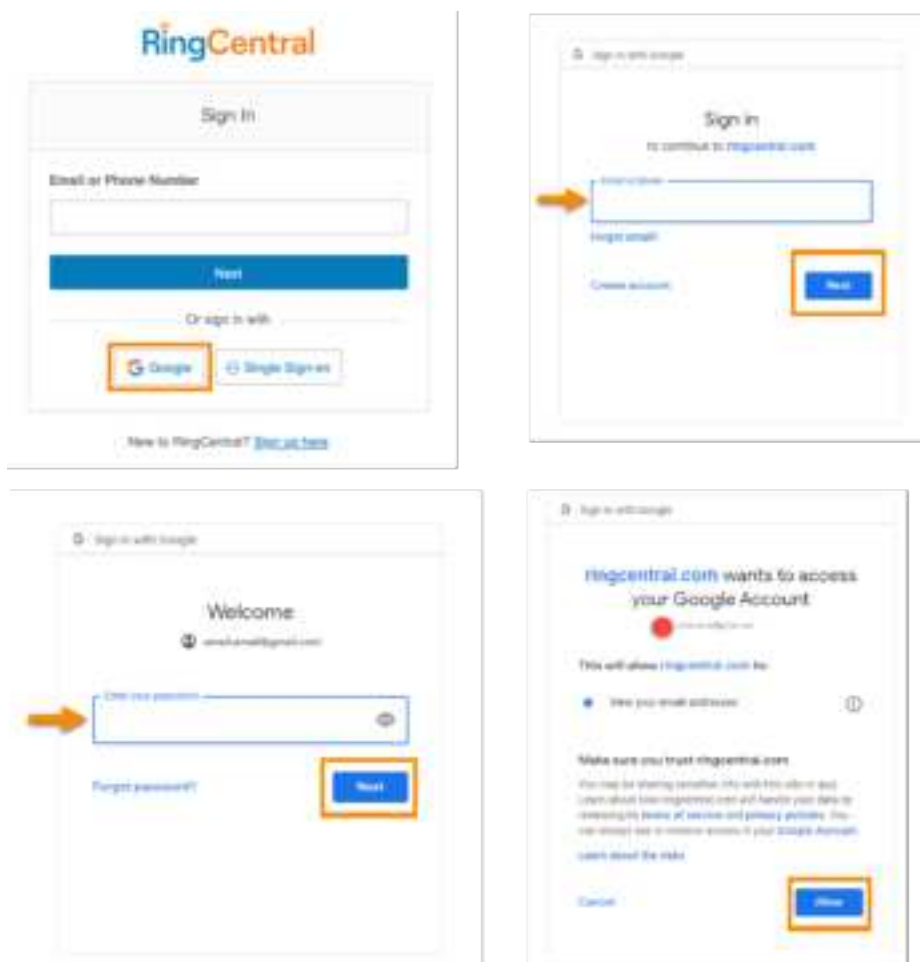
This feature applies to accessing your RingCentral online account through endpoints such as RingCentral app, integration plug-ins for Chrome, and the Multiple Account Access portal. You can configure Google Email addresses during the Express Setup of your RingCentral account.

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

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

To log in using Google, follow these steps:

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



Single sign-on

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

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

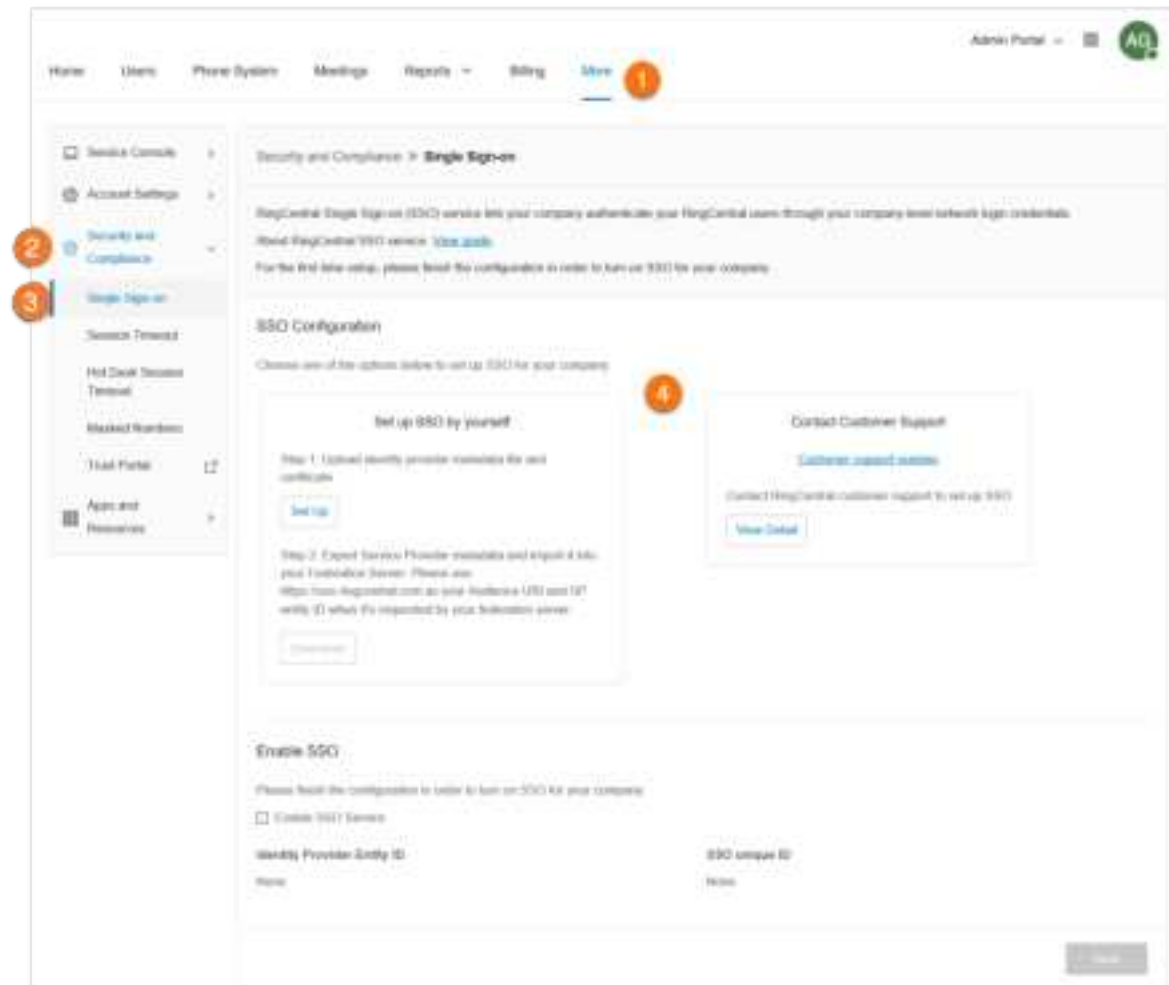
RingCentral also integrates with Google SSO, which allows G Suite customers to use the Google SSO service (offered as part of G Suite IDaaS) to sign in to RingCentral. Google lists RingCentral as an approved SSO app in their SAML apps catalog. As described here, you can configure RingCentral for SSO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

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

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

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

Note: Available for RingCentral Premium and Ultimate users only.



Account Validation

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

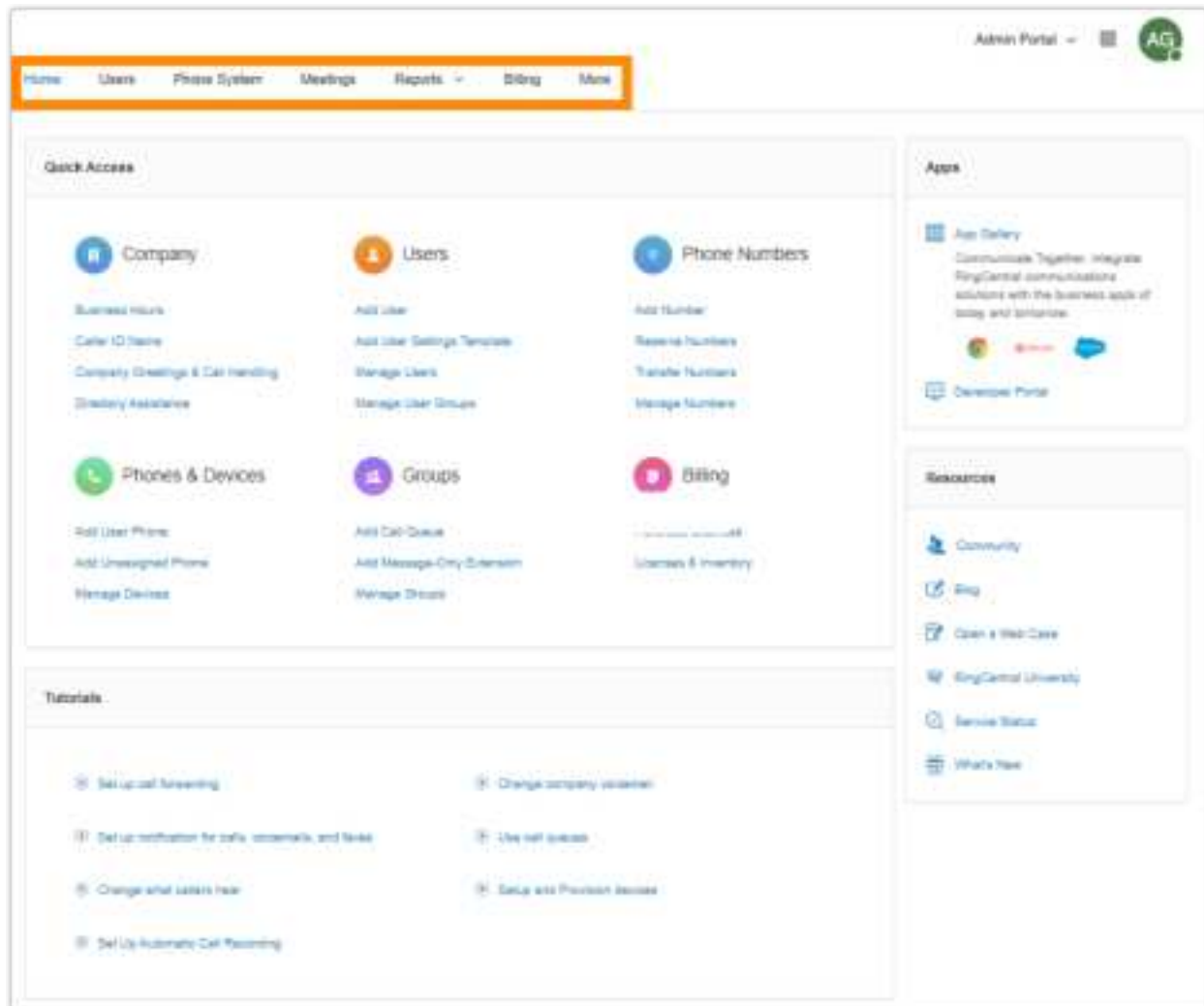
Admin homepage

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

Admin Portal

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

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



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 MVP interface. The top navigation bar features a tabbed menu with 'Overview', 'Messages', 'Call Log', 'Contacts', 'Settings', and 'More'. The 'Settings' tab is currently selected and highlighted with an orange border. Below the navigation bar, the main content area is divided into two sections. The top section, titled 'User', contains five circular icons representing different settings: 'Greetings & Call Screening', 'Call Handling Rules', 'Voicemail', 'Caller ID', and 'After Hours Settings'. The bottom section, titled 'Recent Messages', shows a table of messages. The right sidebar contains two sections: 'Announcements' and 'Resources'. The 'Announcements' section includes a link to 'Professional Voice Recordings'. The 'Resources' section includes links to 'Community', 'Blog', 'Open a New Case', 'RingCentral University', 'Service Status', and 'What's New'.

From	Message	Received
001 284 408 JAN PPS	0:40	Yesterday 9:07
000 289 280 RingCentral	0:04	Tue 10/02/2021 3:47
000 289 834 ELMHEIT S	0:36	Mon 09/14/2021 13:07
000 289 834 ELMHEIT S	0:28	Fri 02/02/2021 10:08
000 214 500 LAWRENCE TAMP P	0:00	Fri 02/02/2021 12:40

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 top screenshot shows the RingCentral Admin Portal's 'General Settings' page. On the left sidebar, 'Auto-Response' is expanded, and 'General Settings' is selected. In the main content area, under 'Custom Answering Rules', there is a 'Learn More' link highlighted with an orange box. An orange arrow points from this link to the bottom screenshot.

The bottom screenshot shows a Knowledge Base article titled 'Set up Company Custom Answering Rules'. The article includes a metadata sidebar on the left with details like 'Updated: 21 May 2022', 'Author: Universal Connect IC', and 'Page Views: 122,345'. The main content area features a video player titled 'Adding a Custom Answering Rule to Your Auto-Responder' and a list of steps to configure custom answering rules.

Set up Company Custom Answering Rules

Multi-condition advanced call handling or custom answering rules offer powerful call management capabilities using conditions based on time of day, date ranges, 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-Responder

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-Responder > General Settings > IVR Settings.
4. Under Custom Answering Rules, click Custom Rule.
5. Click Add Rule.

Audio conference

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

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

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

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

Launching the conferencing app

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

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

Conference commands

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

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

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

Conference Commands	
Use your touch-tone (dialpad) keys to mute or block participants, record the call, and more.	
Command	Action
* # 2	Caller Count Keep track of how many people are on the call
* # 3	Leave Conference Lets the host hang-up and end the call
* # 4	Menu Listen to the list of touchtone commands
* # 5	Set Listening Modes Press 1x: Mute callers - Callers can unmute with * # 6 Press 2x: Mute callers - Listen only, no unmuting option Press 3x: Unmute callers - Opens the line again
* # 6	Mute Host Line Press once to MUTE Press again to UNMUTE
* # 7	Secure the Call Press once to BLOCK all callers Press again to OPEN the call
* # 8	Hear sound when people Enter or Exit call Press 1x: Turns OFF sound Press 2x: Enter tone is ON Exit tone is OFF Press 3x: Enter tone is OFF Exit tone is ON Press 4x: Turns ON sound
* #	Record your conference Press once to START recording Press again to STOP recording
Done	

RingOut

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

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



FaxOut

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

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

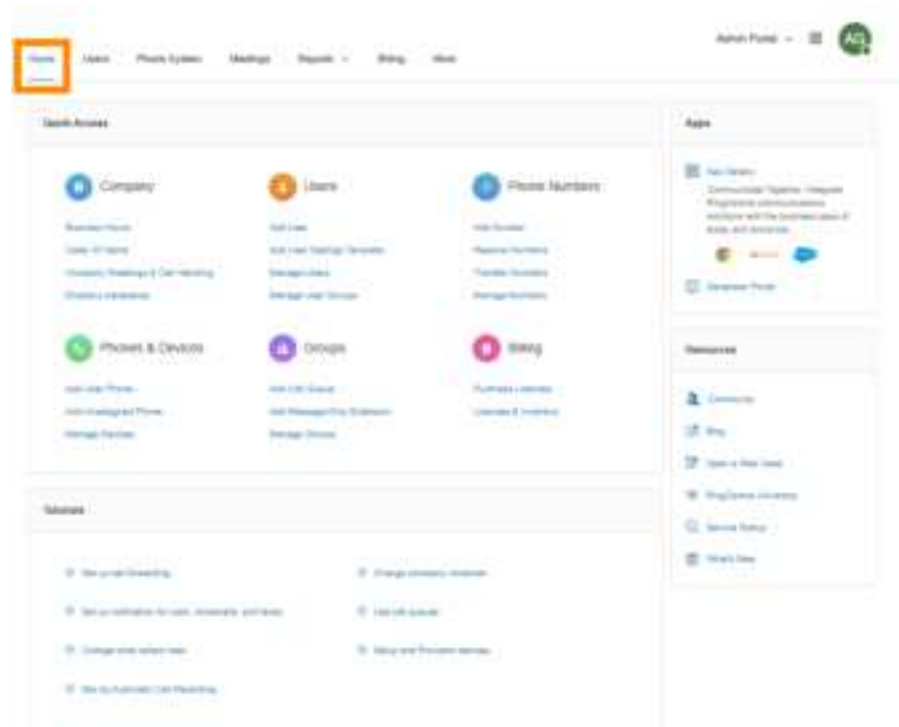
1. Click the **App launcher** next to your profile icon in the upper right-hand side and select the **FaxOut** icon.
2. Enter up to 50 recipients.
 - a. Search and choose Contacts or Groups.
 - b. Click **Insert**.
3. Select your cover page and add a message.
4. Attach files from Dropbox, Box, Google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



Home tab

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

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



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

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

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

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

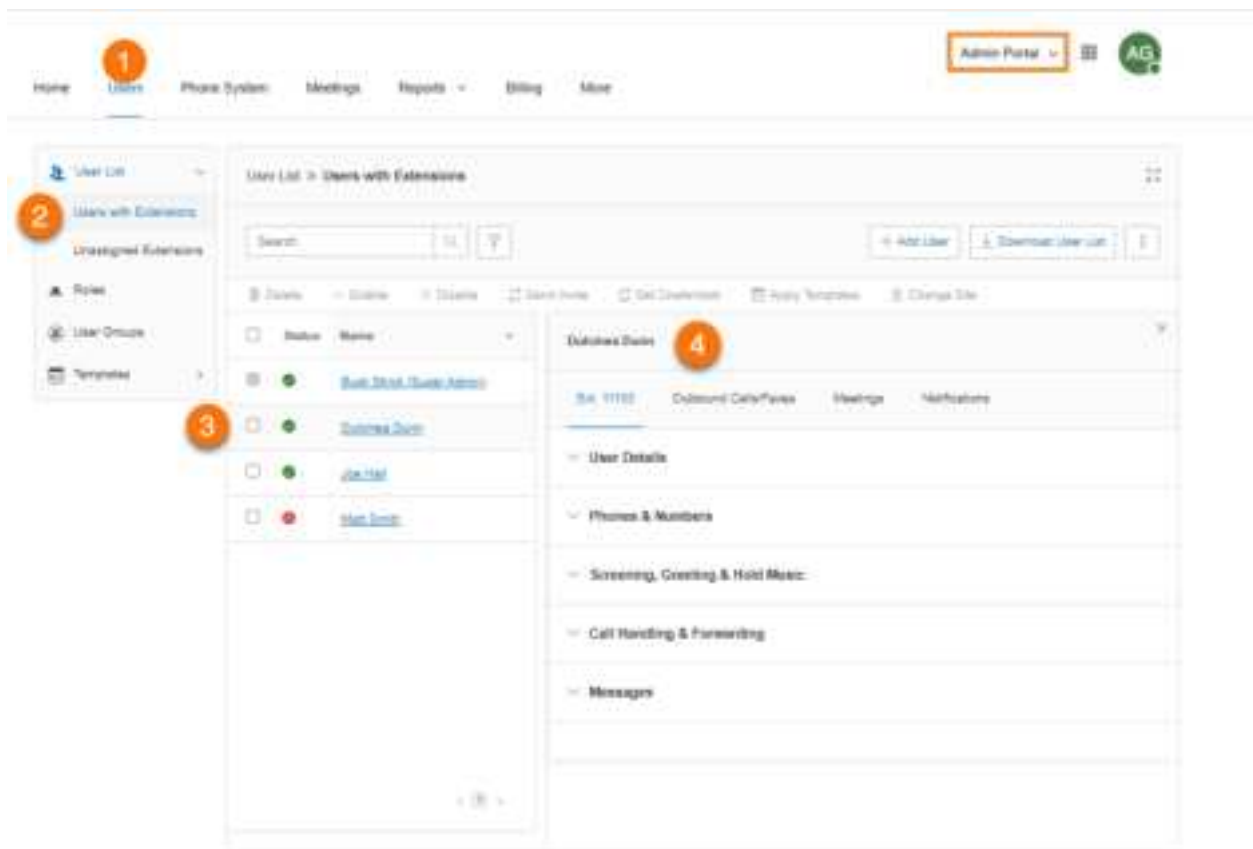
- [Community](#)
- [Blog](#)
- [Open a Web Case](#)
- [RingCentral University](#)
- [Service Status](#)
- [What's New](#)

Managing users

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

Viewing users with extensions

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



Customizing columns in Users with Extensions list

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

The following columns are available:

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

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

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

Viewing unassigned extensions

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

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

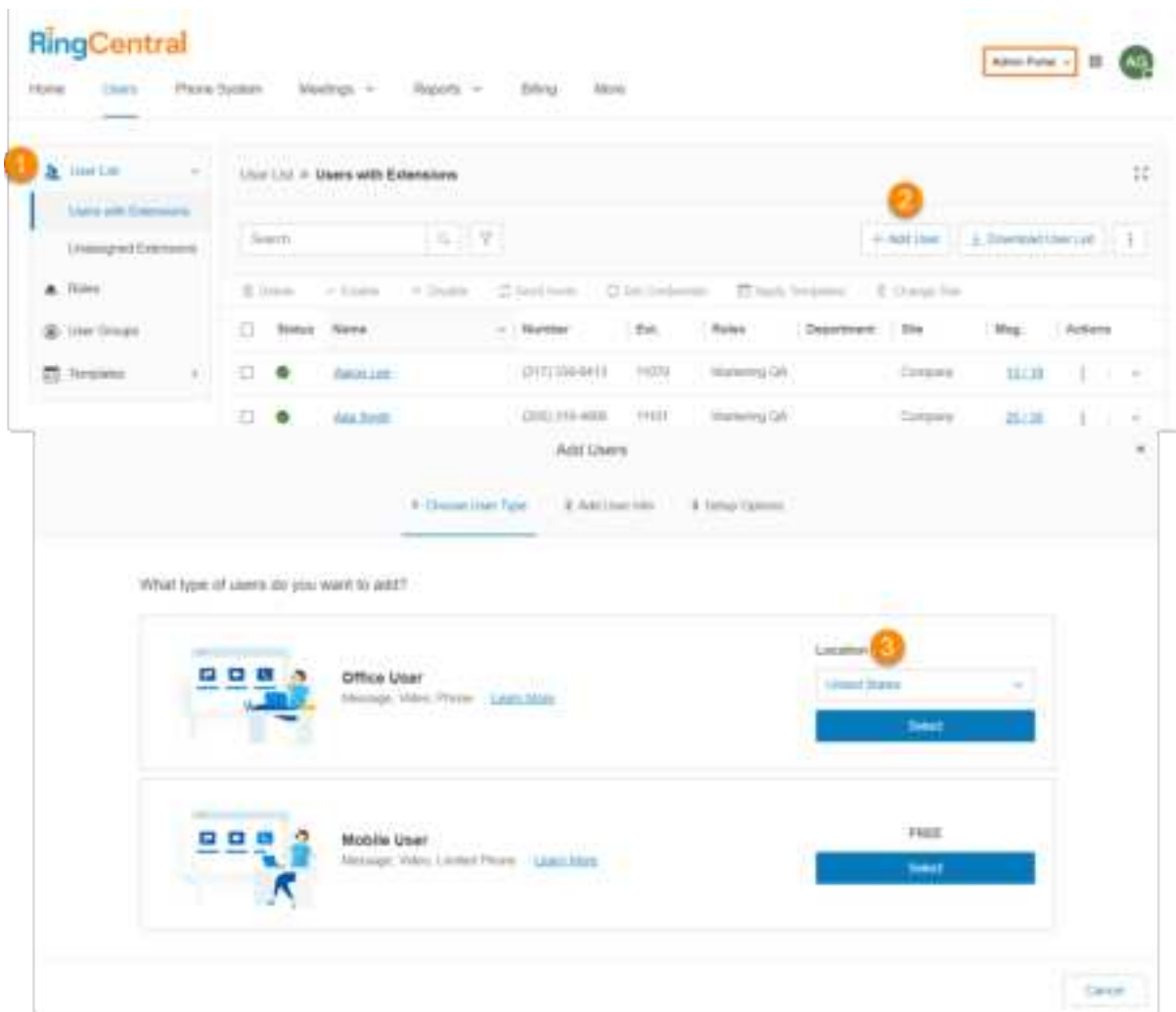
The user interface shown is for accounts with two or more users. Accounts with one user will see a different interface.

The screenshot displays the RingCentral Admin Portal interface for managing users and extensions. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The left sidebar shows the 'User List' section with a sub-menu for 'Unsigned Extensions'. The main content area is titled 'User List > Unsigned Extensions' and features a search bar, a '+ Add User' button, and a 'Change View' dropdown. Below this is a table of extensions with columns for Name, Serial No., Number, Site, and Actions. The table lists several extensions, some with phone numbers and others with 'No device assigned'. A blue 'Ask RingCentral' button is located at the bottom right.

<input type="checkbox"/>	Name	Serial No.	Number	Site	Actions
<input type="checkbox"/>	Ext. with Extension Phone		(818) 888-1234	Company	
<input type="checkbox"/>	Ext. with Extension Phone		(800) 888-1234	Company	
<input type="checkbox"/>	Ext. with no device assigned		+44 (20) 8887...	Company	
<input type="checkbox"/>	Ext. with no device assigned			Company	
<input type="checkbox"/>	Ext. with no device assigned			Company	
<input type="checkbox"/>	Ext. with no device assigned			Company	
<input type="checkbox"/>	Ext. with Phone: Tro. 8888 Conference		(800) 888-1234	Company	
<input type="checkbox"/>	Ext. with Phone: VVX 801		(800) 888-1234	Company	
<input type="checkbox"/>	Ext. with Phone: VVX 801		(800) 888-1234	Company	
<input type="checkbox"/>	Ext. with Phone: VVX 801		(800) 888-1234	Company	

Adding users with devices

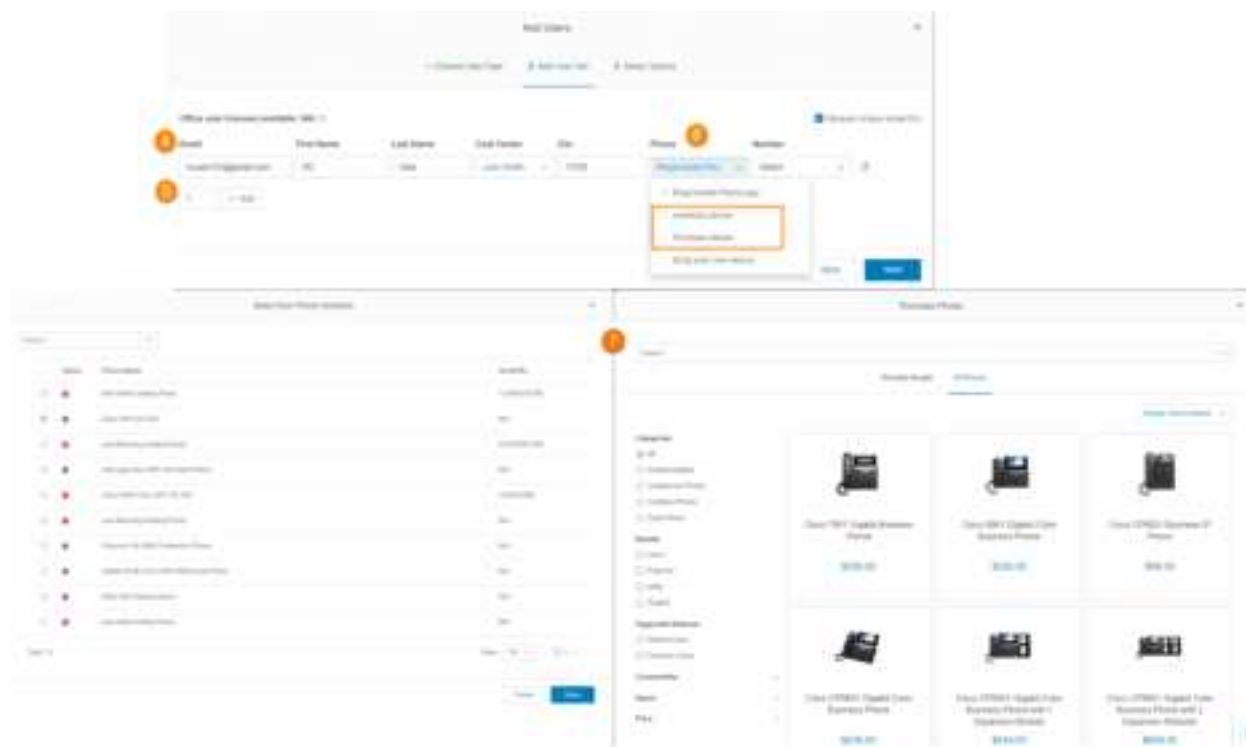
1. From the **Admin Portal**, navigate to **Users > User List > Users with Extensions**.
2. Click **Add User**. The **Add Users** window appears.
3. Select a **Location** from the dropdown list in **Office User** type, then click **Select**. By default, location is based on the home country of the account.



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

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

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



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

8

Select Number

Number Inventory

New Numbers

Search

Locations

Number	Name	Location
<input type="radio"/> (916) 466-2340		United States, Fair Oaks, CA
<input type="radio"/> (520) 246-8625		United States, Casa Grande, AZ
<input type="radio"/> (520) 246-8704		United States, Casa Grande, AZ
<input type="radio"/> (520) 246-8736		United States, Casa Grande, AZ

Total: 4

Show 25

Cancel

Done

Add Users

✓ Choose User Type

2 Add User Info

3 Setup Options

Office user licenses available: 945

Requires unique email IDs

Email	First Name	Last Name	Cost Center	Site	Ext.	Phone	Number
stacie.g@K2000.com	Stacie	Graham	John Smith	Company	1112	Class 8001 G	(520) 246-8625 (in ...)

1

Add

Shipping Info

[Ship to multiple addresses](#)

9

Select Shipping Address

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

238

New

Attention to

Something New

Select Shipping Method

Ground

Select Cost Center

John Smith Company

Order Summary

One-time Charges	Qty	Subtotal*
Phone	1	\$129.00

Today's Estimated Total*

\$129.00

*This price does not include calculations for provided amount, items, 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.

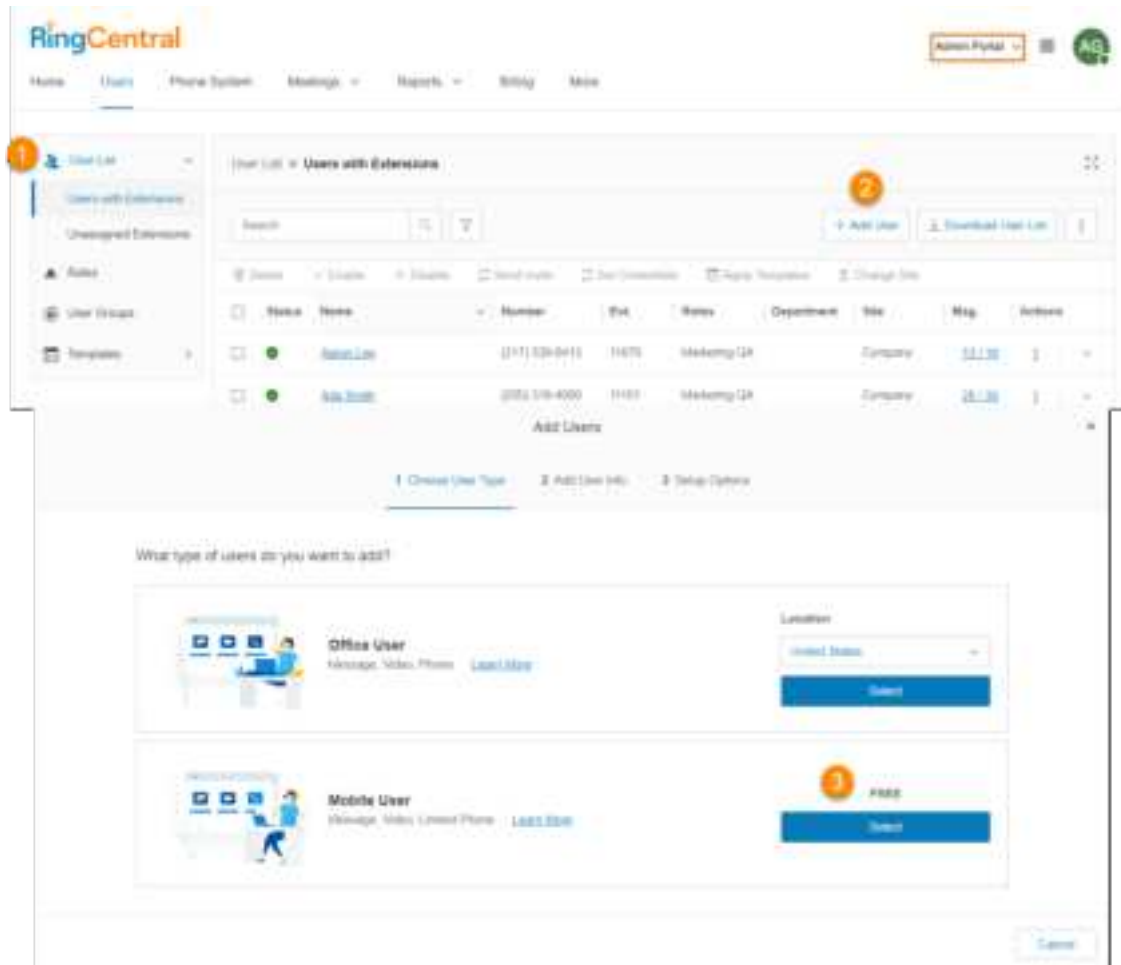
9. Review the charges and check the acknowledgment box at the bottom.
10. Click **Next**.

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 acknowledgement box at the bottom.
5. Click **Next**.

Adding free users (without a device and a number)

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



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

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.



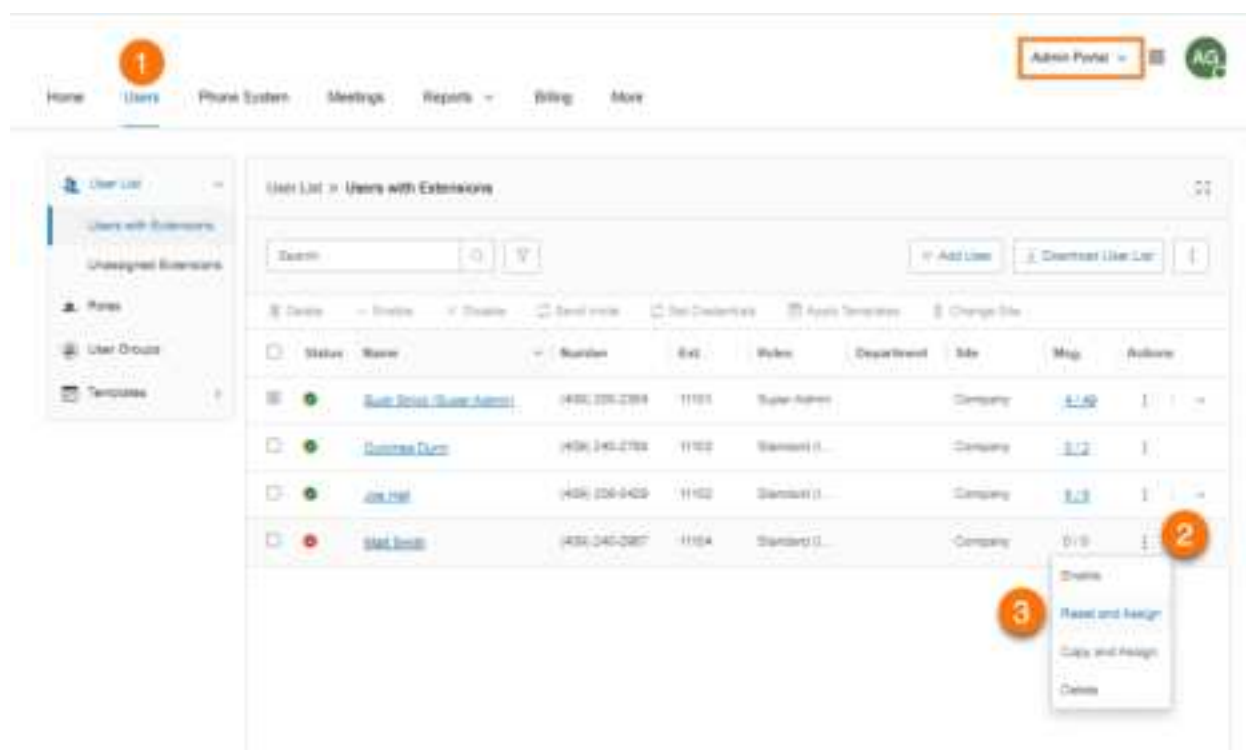
When deleting multiple users, some numbers may not be reassigned to the number inventory. For example, BYOC gateway numbers, forwarded numbers, and AU13 numbers may not be reassigned to the number inventory and will be assigned by default to the auto-receptionist.

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**.

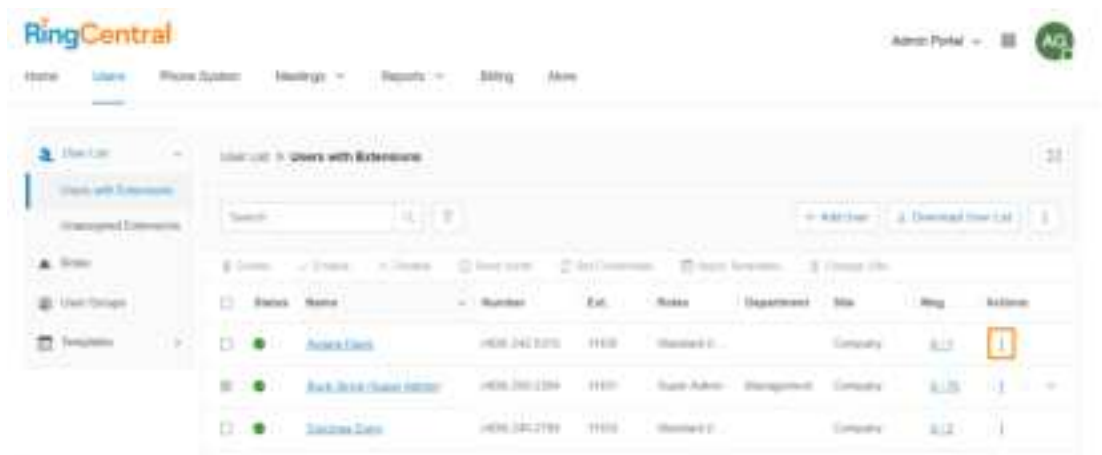
A green notification banner confirms successful reassignment, along with a confirmation email to the admin. You can also confirm results in [Audit Trail](#).



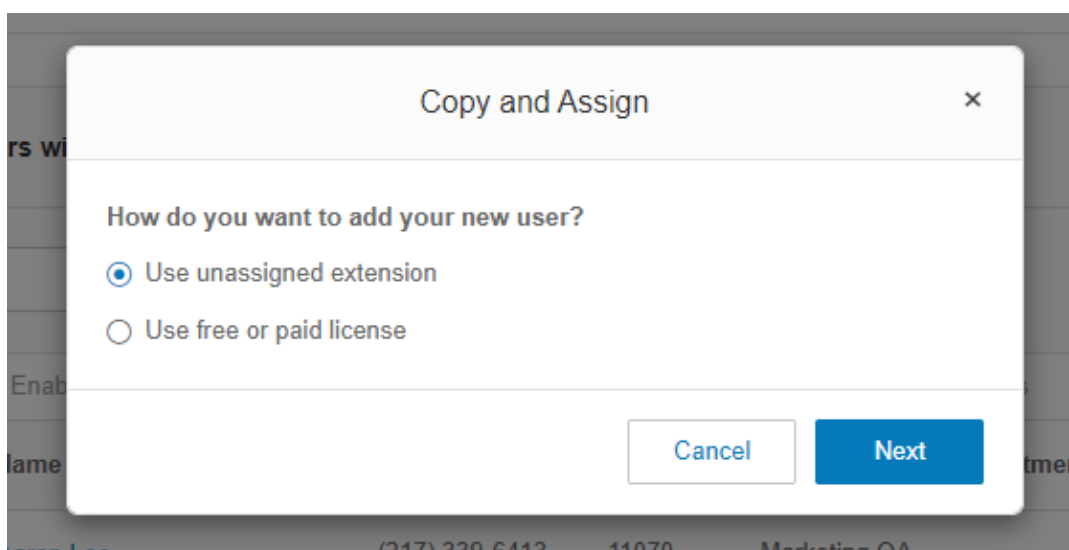
[illegible]

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.



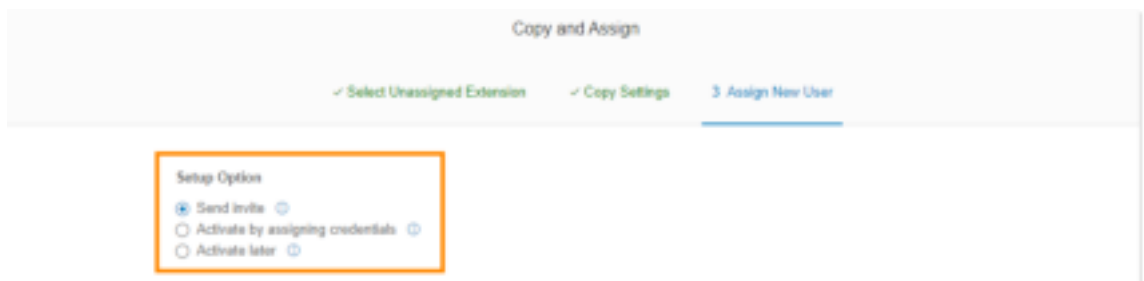
3. Select **Copy and Assign**.
4. On the **Copy and Assign** window, choose **Use unassigned extension**. Click **Next**.



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**.



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



8. Click **Copy and Assign**.

Exporting a user list

Exporting a User List

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

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

The screenshot illustrates the process of exporting a user list from the RingCentral Admin Portal to Microsoft Excel. The top portion shows the Admin Portal interface with the 'Users' tab selected (marked with a red '1'). The 'Download User List' button is highlighted (marked with a red '2'). The bottom portion shows the resulting Excel file, 'Mailbox ID', with the user list data (marked with a red '3').

Mailbox ID	First Name	Last Name	Extension	Email	Mobile Phone	Department
62409920012	Buck	Strick	11101	strickandpropane13		
62409920012	Buck	Strick	11101	strickandpropane13		
62522240012	Quinea	Dunn	11103	dskinea.dunn@gmail		
62409922012	Joe	Hall	11102	rchu4241@gmail co		
62409922012	Joe	Hall	11102	rchu4241@gmail co		
62409927012	Matt	Smith	11104	matymathesmith@gmail		

Editing user information in bulk

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

To edit user information in bulk:

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

Converting a virtual extension to a digital line

To convert a virtual extension to a digital line:

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

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

Managing User Settings

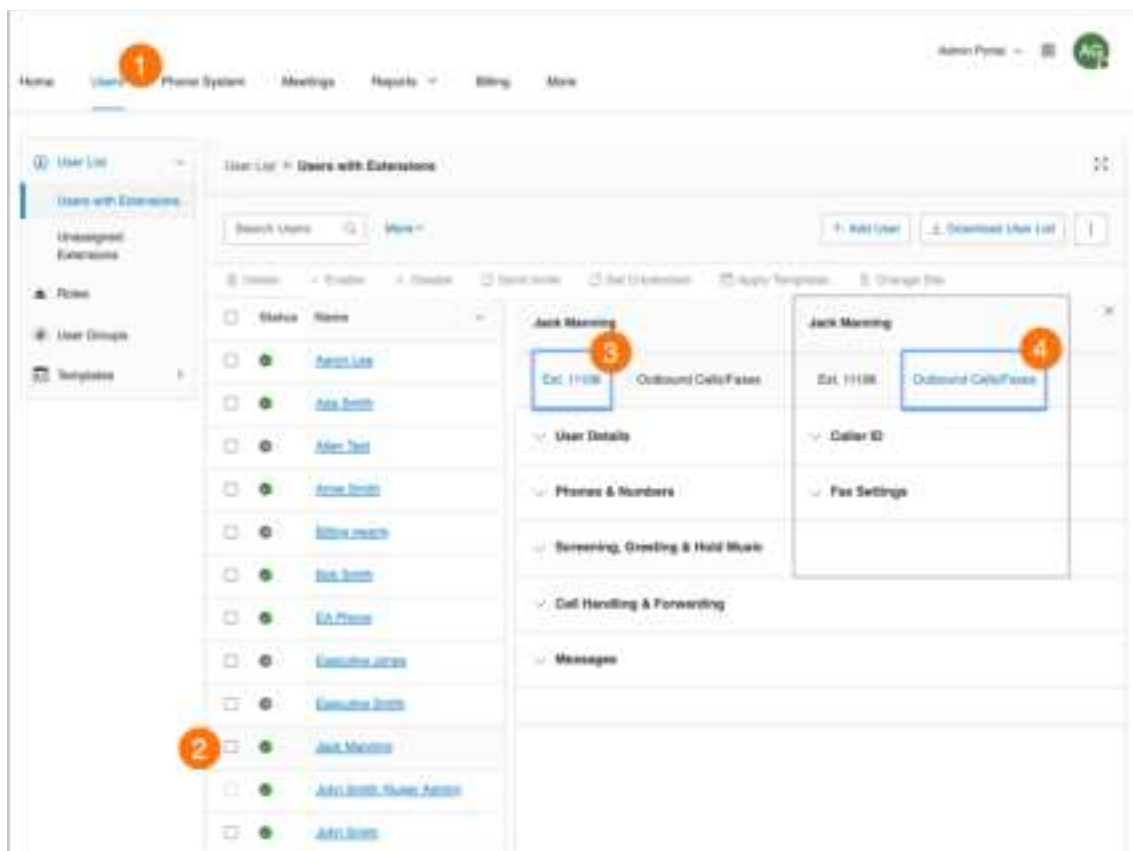
Admins can edit the following user settings:

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

Administrators access and edit settings through the Users panel.

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

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



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.

User Details

Super Admin

General

Settings & Permissions

First Name

Last Name

Job Title

Work Extension Number

Mobile Number

Status

Online

Second User Name

Work Email

Department

Contact Phone

Email

Verify Email (Unverified)

Password

Change Password

Regional Settings

SAF (SAP) Region (US)

Roles

Super Admin

Template

Apply

Confirmation Message

Disabled

User Hours

Sunday

User Groups

Type

Site

Company

Single Region

Selected

Go Back and Refresh

Cancel

Save

Yes, I would like to receive information on product solutions, pricing, seminars, etc.

Send us email when a price is added

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.

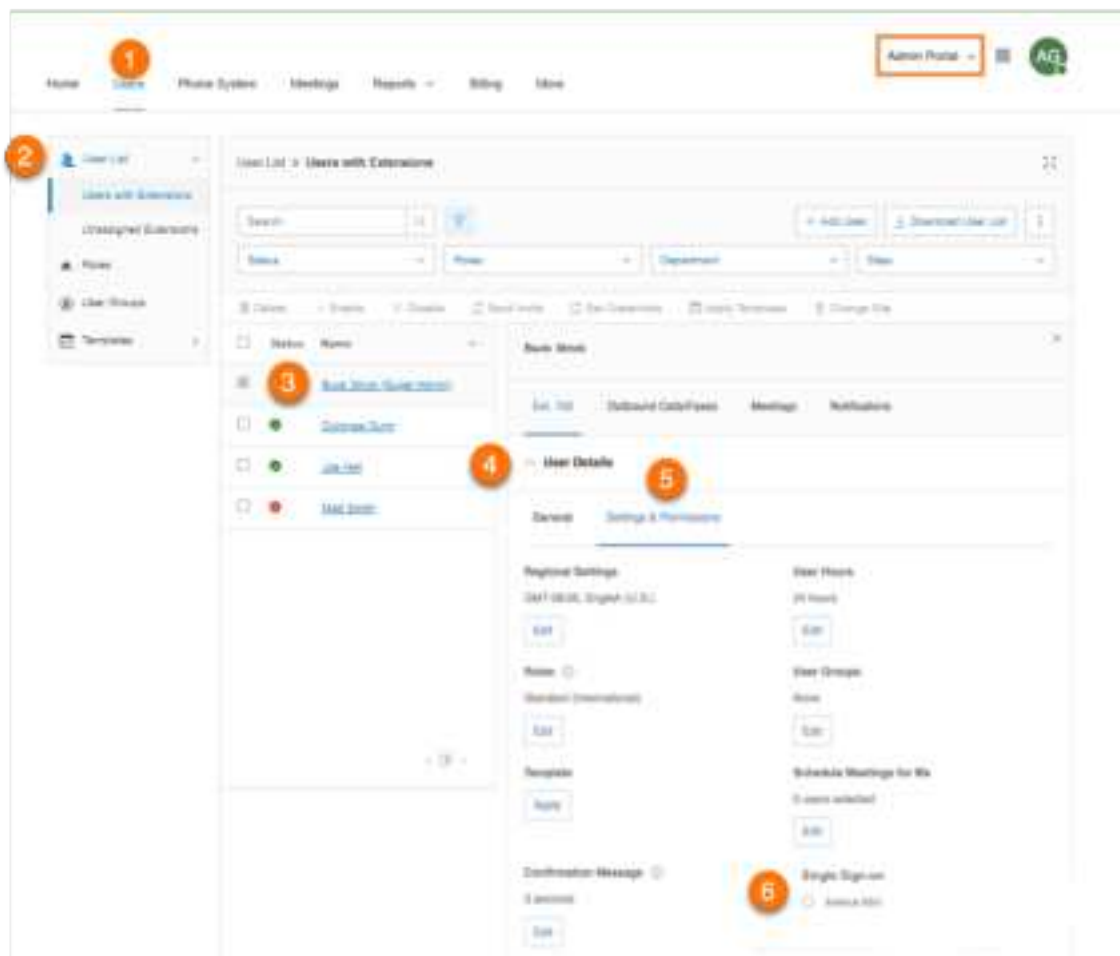
Admins can also enforce SSO at a later time for these users that have already set their RingCentral credentials during onboarding.

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](#).



Phones & Numbers

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

^ Phones & Numbers

Numbers

Phones

Conference

+ Add Direct Number

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

^ Phones & Numbers

Numbers

Phones

Conference

+ Add Phone

Presence

Delegates

Intercom

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

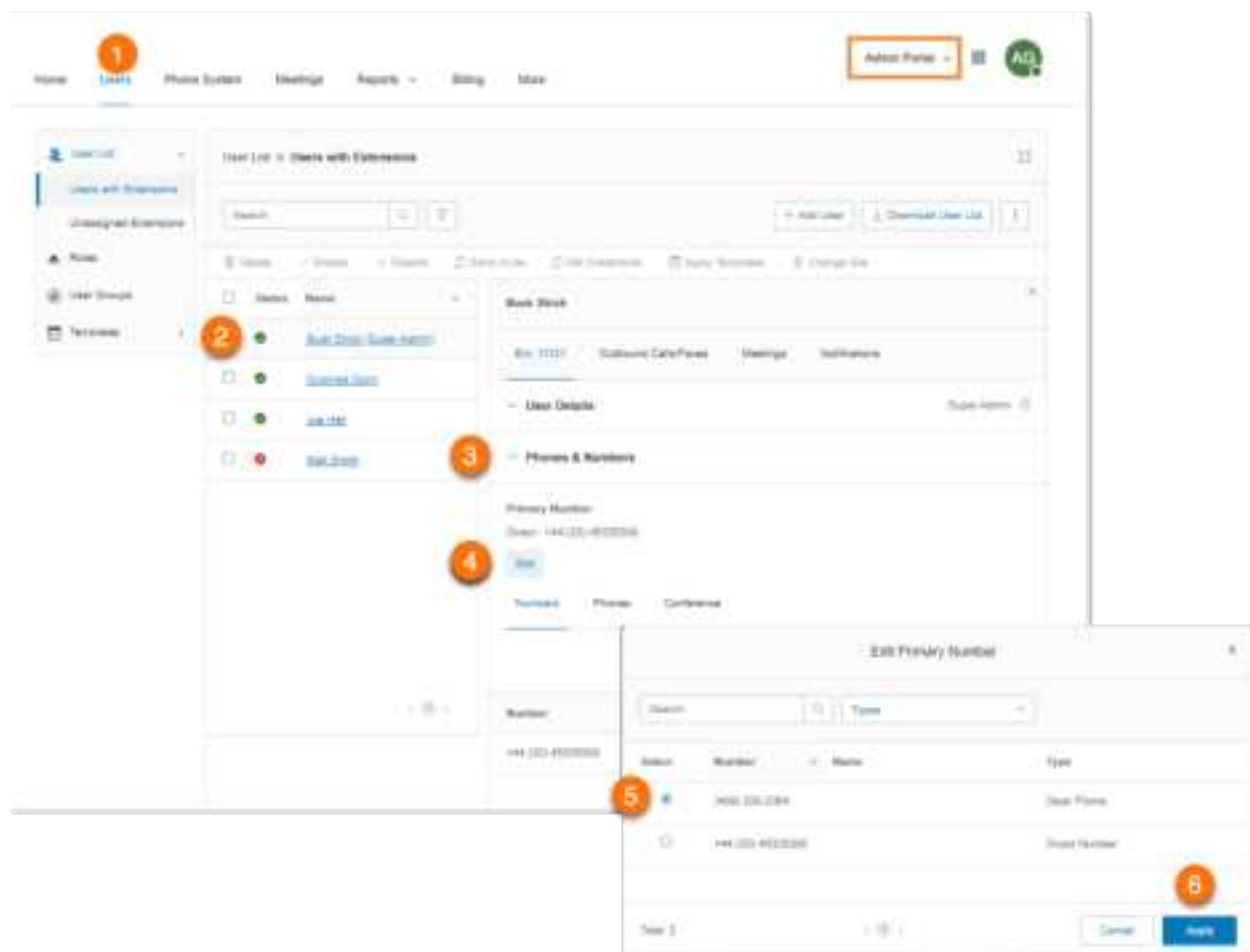
Primary Number

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

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

To set a user's primary number:

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



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.

The image displays two side-by-side screenshots of the 'Screening, Greeting & Hold Music' settings page for a user. Both screenshots show the same page with different tabs selected.

Left Screenshot (User Hours tab selected):

- User Greeting:** Enabled. Default: 00:00 / 00:00. Default Greeting: "Thank you for calling Jack Manning".
- Connecting Message:** Enabled. Default: 00:00 / 00:00. Default Message: "Please hold while I try to connect you."
- Hold Music:** Enabled. Music: Acoustic.
- Call Screening:** Enabled. If Caller ID not present, ask callers to say their name before connecting.
- Audio While Connecting:** Enabled. Music: Acoustic.

Right Screenshot (Blocked Calls tab selected):

- Block option:** Specific calls and faxes.
- Only block these numbers or area codes:** Phone Numbers or Area Codes, Name (Optional), + Add.
- Number:** (857) 222-2222. **Name:** RingCentral. **Actions:** Create.
- Callers will hear:** I'm sorry. The number you dialed can not be reached from your calling area. Goodbye.
- Robocalls:** Block option: Ring devices and apps.
- Trusted numbers:** Phone Number, Name (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.

Call Forwarding and Voicemail

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

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

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

Call Forwarding and Voicemail

[Work Hours](#) [After Hours](#) [Custom Rules](#) [Settings](#)

Incoming Calls

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

🔊 Ring all at once

Create Ring Group Ungroup Delete

<input type="checkbox"/>	Order	Active	Ring For	Name	Number
<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Promotion	(650) 296-123
<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Phone 1	(530) 503-2222
<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	Always Ring	Desktop & Mobile...	

+ Add number or coworker

Missed Calls:

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

📠 Send to voicemail

Voicemail Greeting

Default

▶ 00:00 / 00:00 🔊

Edit

Select voicemail box

☒ This Extension (Ext. 101)
☐ Specific Extension

Cancel

Save

Outbound Calls/Faxes

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

Outbound Caller ID

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

Caller ID

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

By Phone

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

By Feature

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

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

Mobile App
Not-specified
[Edit](#)

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

Alternate Caller ID
Not-specified
[Edit](#)

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

Fax Number
(857) 777-7777 - Main Company Number
[Edit](#)

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

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

Internal Calls

☒ Display my extension number for internal calls. ⓘ

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

Outbound Fax settings

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

^ Fax Settings

Cover Page Info

This information will be printed on your fax cover page

Company

e.g. John Doe

Country

United States

Street Address

e.g. 120 1st St SW

Additional address (Optional)

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

City

e.g. Alabaster

State/Province

Select State/Province

Zip Code

e.g. 35007

Phone Number

(857) 777-7777 - Main Company Number

Edit

Cover Page

Contempo

Select

Fax Number

(857) 777-7777 - Main Company Number

Edit

Faxes Sent via Email

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

Omit cover page when email subject is blank

☐ On ☒ Off

Email Addresses

Email addresses permitted to send faxes

Email@example.com

Add

Cancel

Save

Bulk adding or editing users

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



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

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

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

Setting up users

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

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

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

Activating by assigning credentials to a user

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

Note that these are all required fields.

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

Managing roles and permissions

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

Predefined roles

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

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

Note: Predefined roles cannot be modified.

Custom roles

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

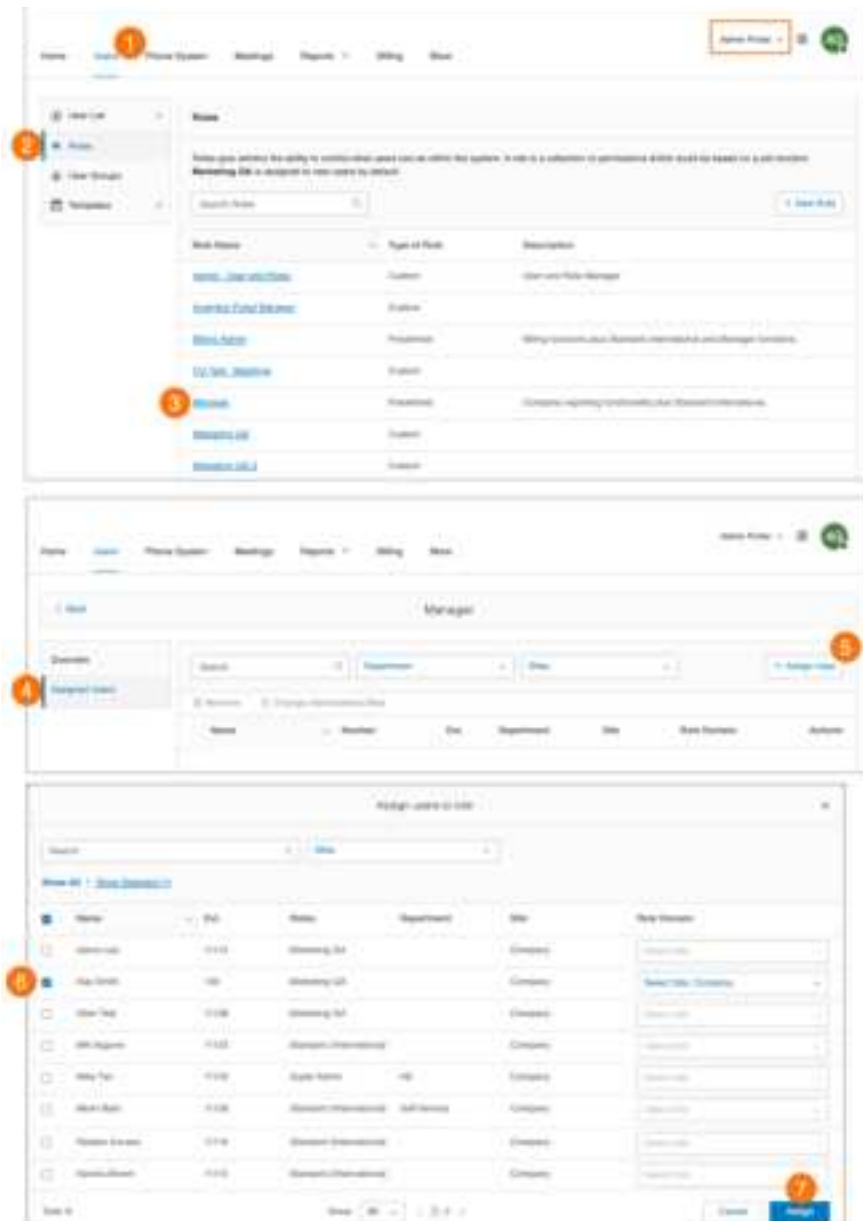
Note: This feature is available only to RingCentral MVP Premium and Ultimate with two or more users in the US, Canada, and UK.

Assigning users to a role

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

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

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



Modifying a user's role

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

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

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

The left sidebar contains a 'User List' section with options for 'Users with Extensions', 'Unassigned Extensions', 'Roles', 'User Groups', and 'Templates'. The main content area is titled 'User List > Users with Extensions'. It features a search bar, a '+ Add User' button, and a 'Download User List' button. Below these are filters for 'Dialtone', 'Extension', 'Discontinue', 'Send Message', 'Set Credentials', 'Apply Templates', and 'Change Site'.

A table lists users with columns for 'Status' and 'Name'. The user 'Jack Manning' is highlighted with an orange circle 2. To the right of the table, the 'User Details' for Jack Manning are shown, including 'Ext. 11188', 'Default Call/Fax', 'Meetings', and 'Notifications'. The 'User Details' section is highlighted with an orange circle 3.

Below the 'User Details' is the 'Settings & Permissions' section, highlighted with an orange circle 4. It contains three tabs: 'General', 'Settings & Permissions', and 'Roles'. The 'Roles' tab is selected, showing a list of roles: 'Standard', 'Executive', and 'Executive Smith'. The 'Standard' role is highlighted with an orange circle 5. Below the roles is a 'Template' section with an 'Apply' button.

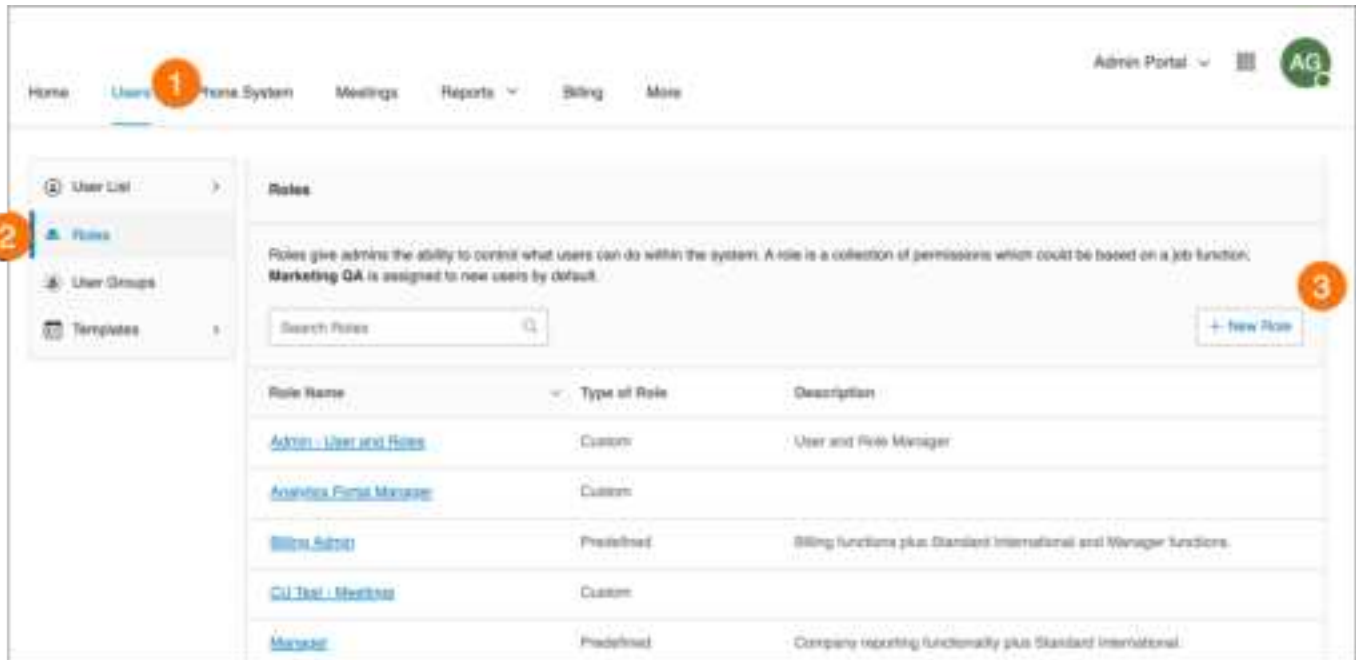
The 'Settings & Permissions' section also includes 'Regional Settings' (GMT+08:00, English (U.S.)) and 'User Hours' (Custom). Both have 'Edit' buttons. The 'User Group' is set to 'None' with an 'Edit' button. The 'Site' is set to 'Company' with an 'Edit' button.

Creating a new role

To create a new, custom role:

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

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



Setting a default role

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

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

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

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

The first screenshot shows the 'Roles' page in the Admin Portal. The 'Users' tab is selected in the top navigation bar (1). In the left sidebar, the 'Roles' link is highlighted (2). The 'Roles' table lists several roles, including 'Admin - User and Roles' (3), 'Analytics Portal Manager', 'Billing Admin', 'CU Test - Meetings', and 'Manager'. The second screenshot shows the 'Analytics Portal Manager' role's edit page. The 'Edit' button is highlighted (4). The 'Set as Default' checkbox is checked (5).

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

Name	Description
Analytics Portal Manager	

Type of Role: Custom ☒ ☐ Predefined

☒ Set as Default ☐

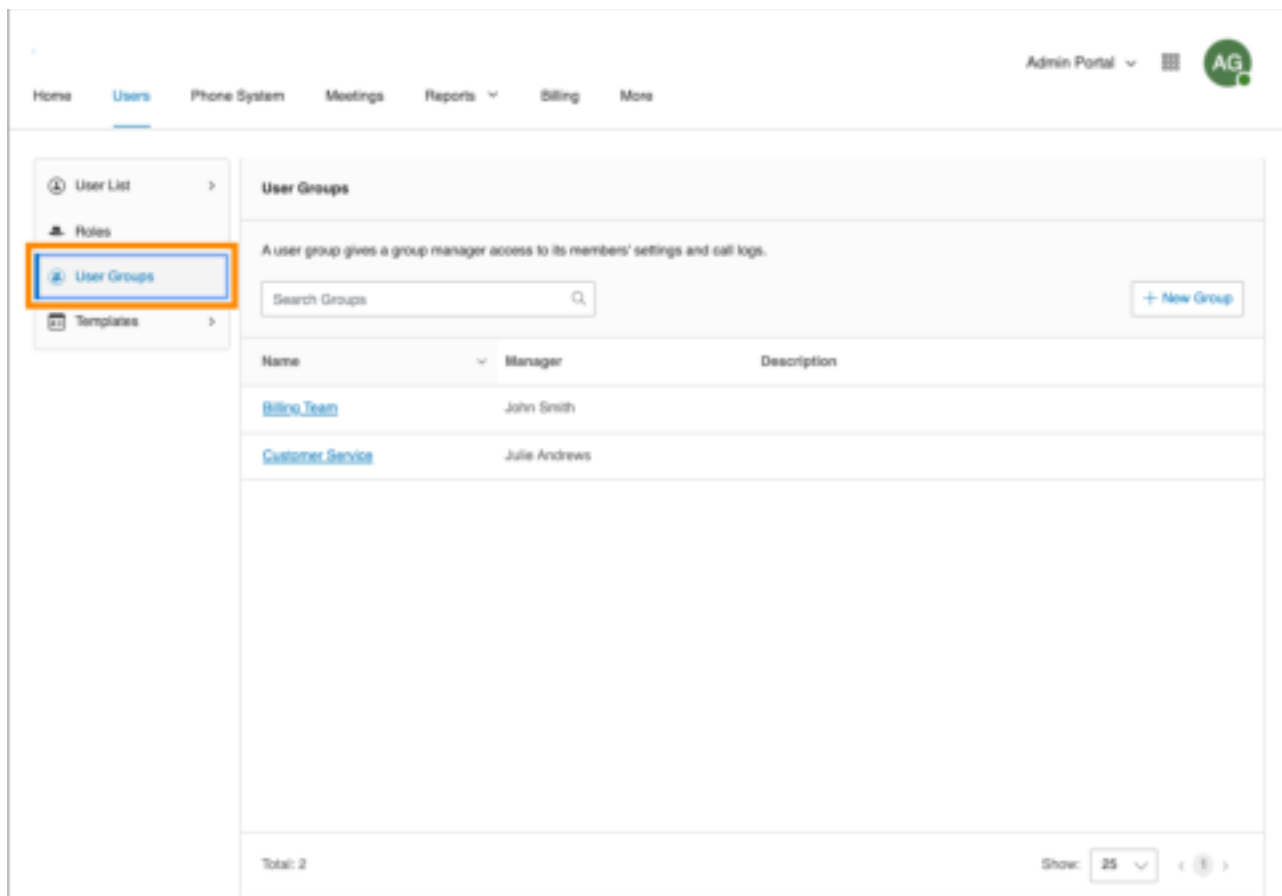
Managing user groups

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

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

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

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



The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The 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
Billing Team	John Smith	
Customer Service	Julie Andrews	

At the bottom of the table, it shows 'Total: 2' and a 'Show: 25' dropdown menu.

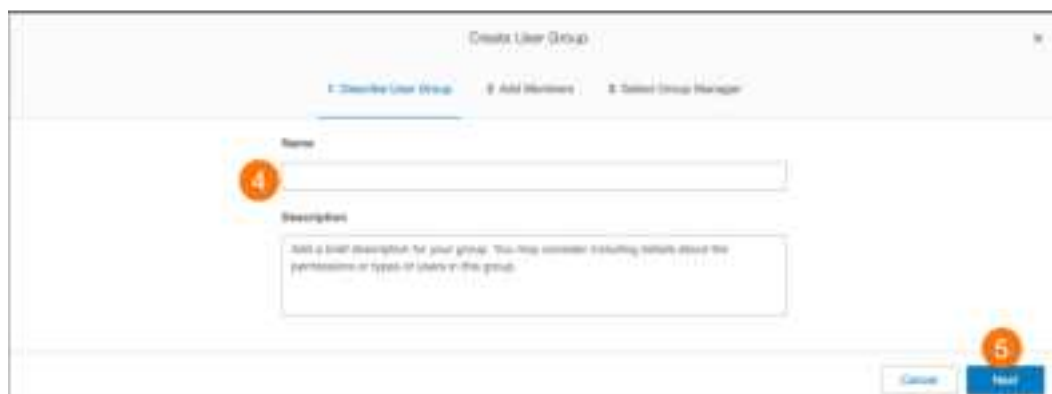
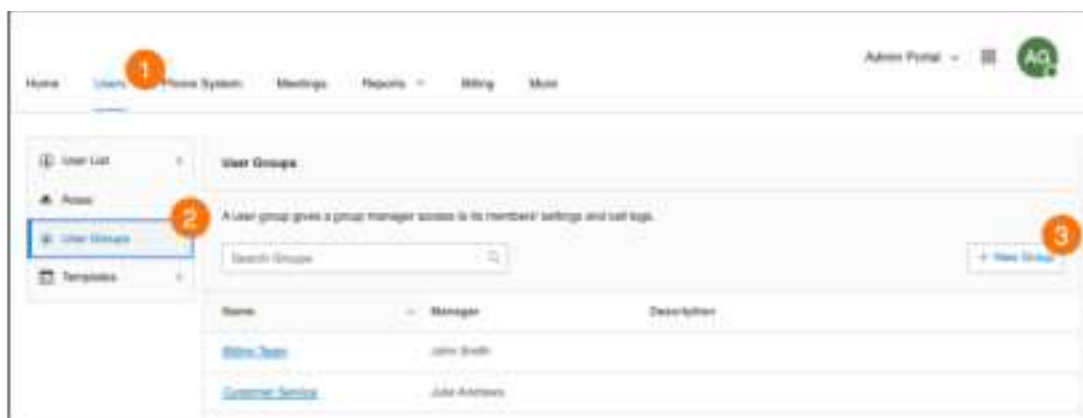
The tasks involved in managing user groups include:

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

Creating a user group

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

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



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

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

Create User Group

Describe User Group

Add Members

Select Group Manager

Search:

Department: All

Size:

Show All

Show Selected (0)

	Name	Ext.	Role	Department
<input type="checkbox"/>	Aaron Lee	11113	Marketing QA	
<input type="checkbox"/>	Ada Smith	100	Marketing QA	
<input type="checkbox"/>	Allen Test	11128	Marketing QA	
<input type="checkbox"/>	Annie Smith	11129	Standard (International)	
<input type="checkbox"/>	Billing Query	11127	Standard (International)	
<input checked="" type="checkbox"/>	Bob Smith	11107	Billing Admin	
<input type="checkbox"/>	CA Phone	11106	Standard (International)	
<input type="checkbox"/>	Executive Jones	11120	Standard (International)	
<input type="checkbox"/>	Executive Smith	11125	Standard (International)	
<input checked="" type="checkbox"/>	Jack Manning	11108	Standard	RE

Total: 20

Next

Create User Group

Describe User Group

Add Members

Select Group Manager

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

Search:

Department: All

Size:

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

Total: 2

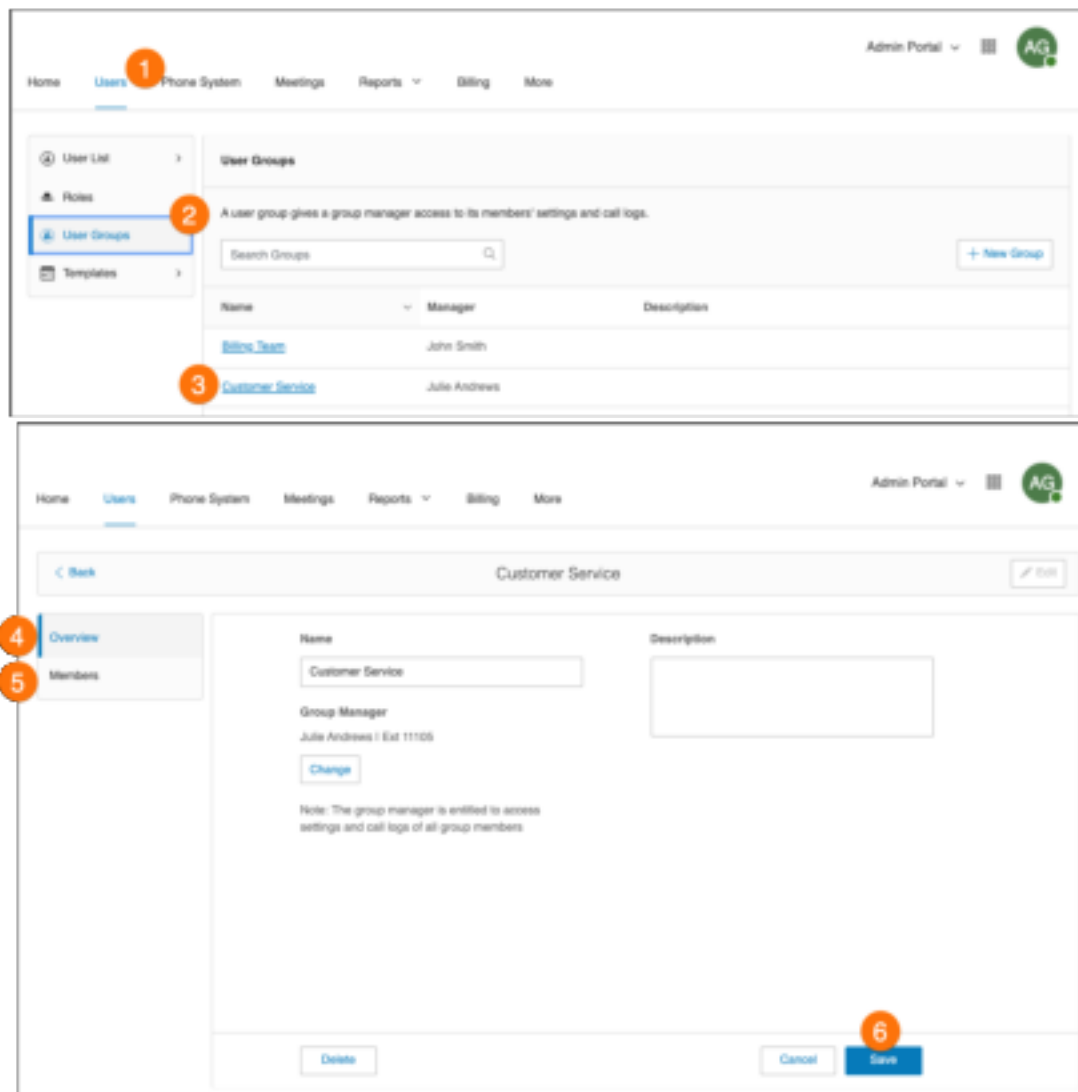
Done

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.



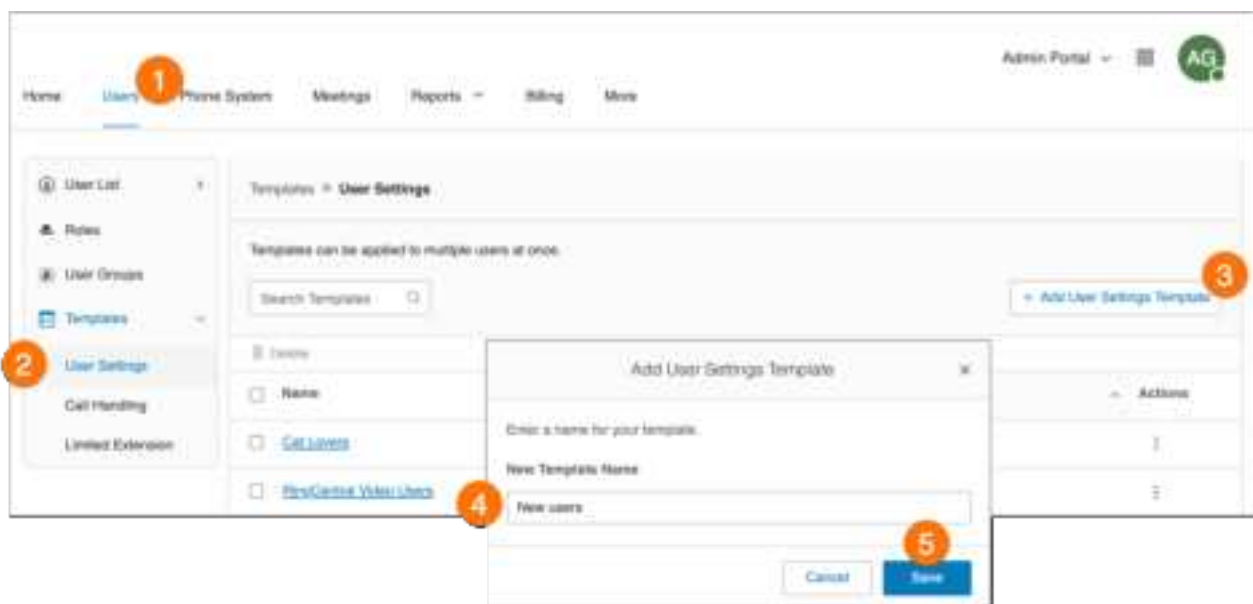
Managing templates

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 Main Settings Template

8

Items

- New users
- Call Center
- RingCentral Sales Leads
- Support
- Call Center Information
- Site
- HR
- HR
- Technical Support
- Customer Support
- Internal
- 1

7

New users

Internal Outbound Notifications

Template Information

New users

Internal Outbound Notifications

Template Information

Template Name

New users

Last Modified

Created

8

New users

Internal Outbound Notifications

Template Information

User Details

Settings & Permissions

Regional Settings

2021-08-05, English (US)

Edit

Override User Settings

Notes

Working Set

Edit

Override User Settings

Site

Company

Edit

Override User Settings

Job Title

Override User Settings

User Name

First Name

Edit

Override User Settings

User Manager

Name

Edit

Override User Settings

Continuous Message

5 seconds

Edit

Override User Settings

Value Service

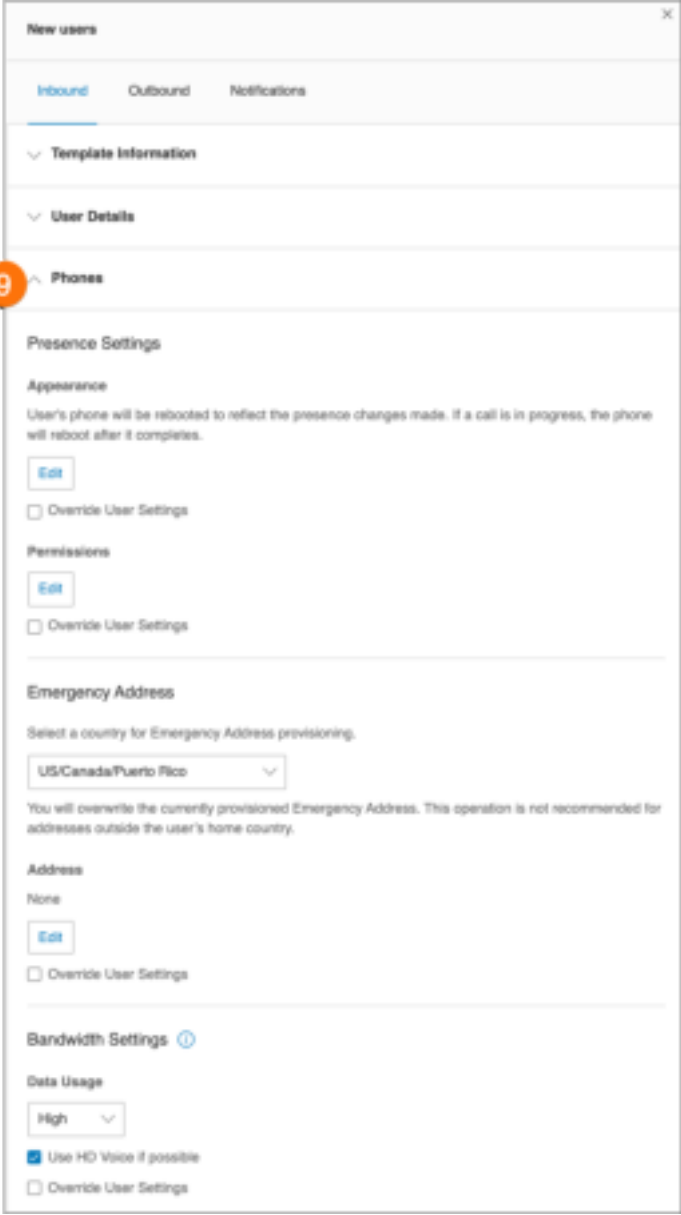
RingCentral Voice

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

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

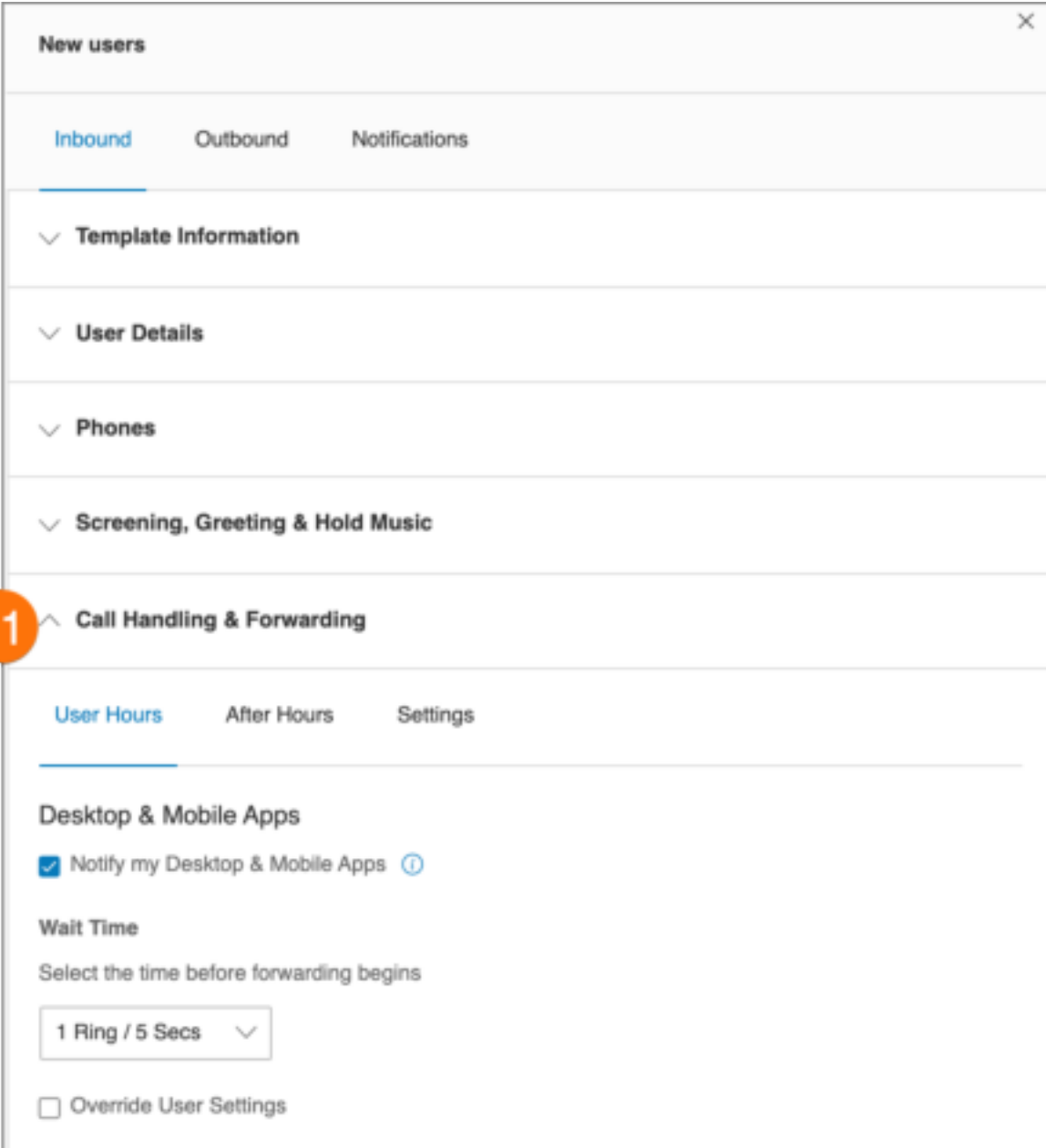
▼ User Details

▼ Phones

^ Screening, Greeting & Hold Music

<p>User Greeting ⓘ</p> <p><input type="checkbox"/> Enable</p> <p><input type="checkbox"/> Override User Settings</p> <p>Connecting Message ⓘ</p> <p><input checked="" type="checkbox"/> Enable</p> <p>Default</p> <p>00:00 / 00:00 🔊</p> <p>Default Message: "Please hold while I try to connect you."</p> <p>Edit</p> <p><input type="checkbox"/> Override User Settings</p> <p>Hold Music ⓘ</p> <p><input checked="" type="checkbox"/> Enable</p> <p>Music: Acoustic</p> <p>00:00 / 00:00 🔊</p> <p>Edit</p> <p><input type="checkbox"/> Override User Settings</p>	<p>Call Screening ⓘ</p> <p><input type="checkbox"/> Enable</p> <p><input type="checkbox"/> Override User Settings</p> <p>Audio While Connecting ⓘ</p> <p><input checked="" type="checkbox"/> Enable</p> <p>Music: Acoustic</p> <p>00:00 / 00:00 🔊</p> <p>Music or Ringtone callers will hear while connecting</p> <p>Edit</p> <p><input type="checkbox"/> Override User Settings</p>
--	--

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

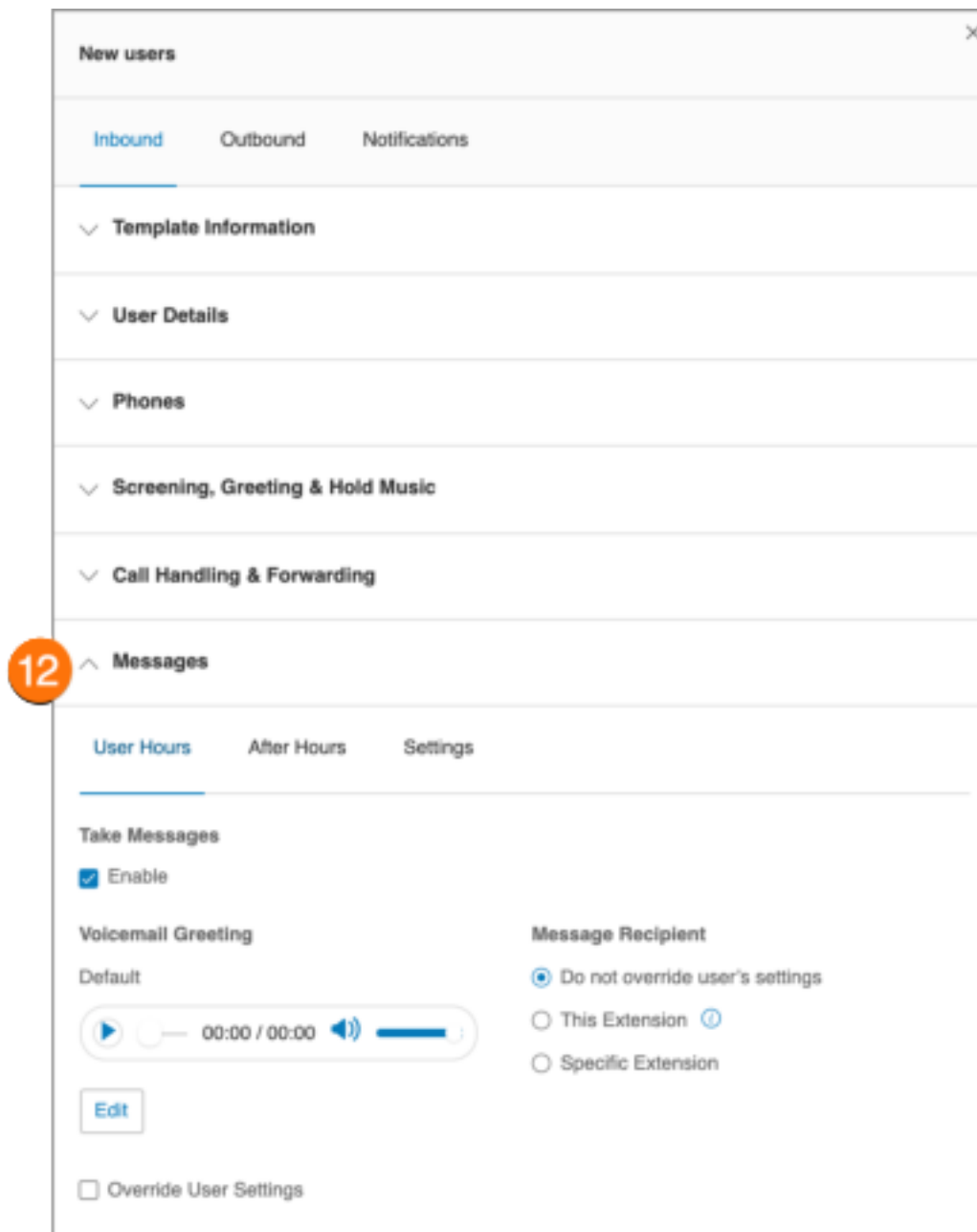
Select the time before forwarding begins

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.



The screenshot displays the 'New users' configuration page in the RingCentral Admin Guide. The page has a tabbed interface with 'Inbound', 'Outbound', and 'Notifications' tabs. The 'Inbound' tab is selected. Below the tabs are several expandable sections: 'Template Information', 'User Details', 'Phones', 'Screening, Greeting & Hold Music', 'Call Handling & Forwarding', and 'Messages'. The 'Messages' section is expanded, and an orange circle with the number '12' highlights its header. Inside the 'Messages' section, there are three sub-tabs: 'User Hours', 'After Hours', and 'Settings'. The 'Settings' tab is selected. Under the 'Settings' tab, the 'Take Messages' section has a checked 'Enable' checkbox. The 'Voicemail Greeting' section shows a 'Default' greeting with a play button, a progress bar, and a volume icon. The 'Message Recipient' section has three radio button options: 'Do not override user's settings' (selected), 'This Extension', and 'Specific Extension'. There is an 'Edit' button below the 'Voicemail Greeting' section and an 'Override User Settings' checkbox at the bottom.

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

Message Recipient

☒ Do not override user's settings

☐ This Extension

☐ Specific Extension

☐ Override User Settings

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.

The screenshot displays the RingCentral Admin interface for configuring outbound settings. The left sidebar shows the 'New users' section with a red circle containing the number '13' next to the 'Outbound' tab. The main content area is divided into two panels: 'Caller ID' and 'Fax Settings'.

Caller ID Panel:

- Caller ID:** A section with a dropdown menu to 'Decide which phone number will display as Caller ID for outgoing calls.' Below this are two sections: 'By Phone' and 'By Feature'.
- By Phone:** Includes a text input for '(800) 777-7777 - Main Company Number' with an 'Edit' button and an 'Override User Settings' checkbox.
- By Feature:** A grid of settings for various features:
 - RingOut from Web:** (800) 777-7777 - Main Company Number, Edit, Override User Settings.
 - RingMe (Outgoing to Call):** (800) 777-7777 - Main Company Number, Edit, Override User Settings.
 - Call Pop:** (800) 777-7777 - Main Company Number, Edit, Override User Settings.
 - Mobile App:** Not specified, Edit, Override User Settings.
 - Additional Desktop App:** (800) 777-7777 - Main Company Number, Edit, Override User Settings.
 - Desktop Phone:** (800) 777-7777 - Main Company Number, Edit, Override User Settings.
 - Designated Caller ID:** (800) 777-7777 - Main Company Number, Edit, Override User Settings.
 - Alternate Caller ID:** Not specified, Edit, Override User Settings.
- Internal Calls:** A section with a checkbox 'Display my extension number for internal calls.' and an 'Override User Settings' checkbox.

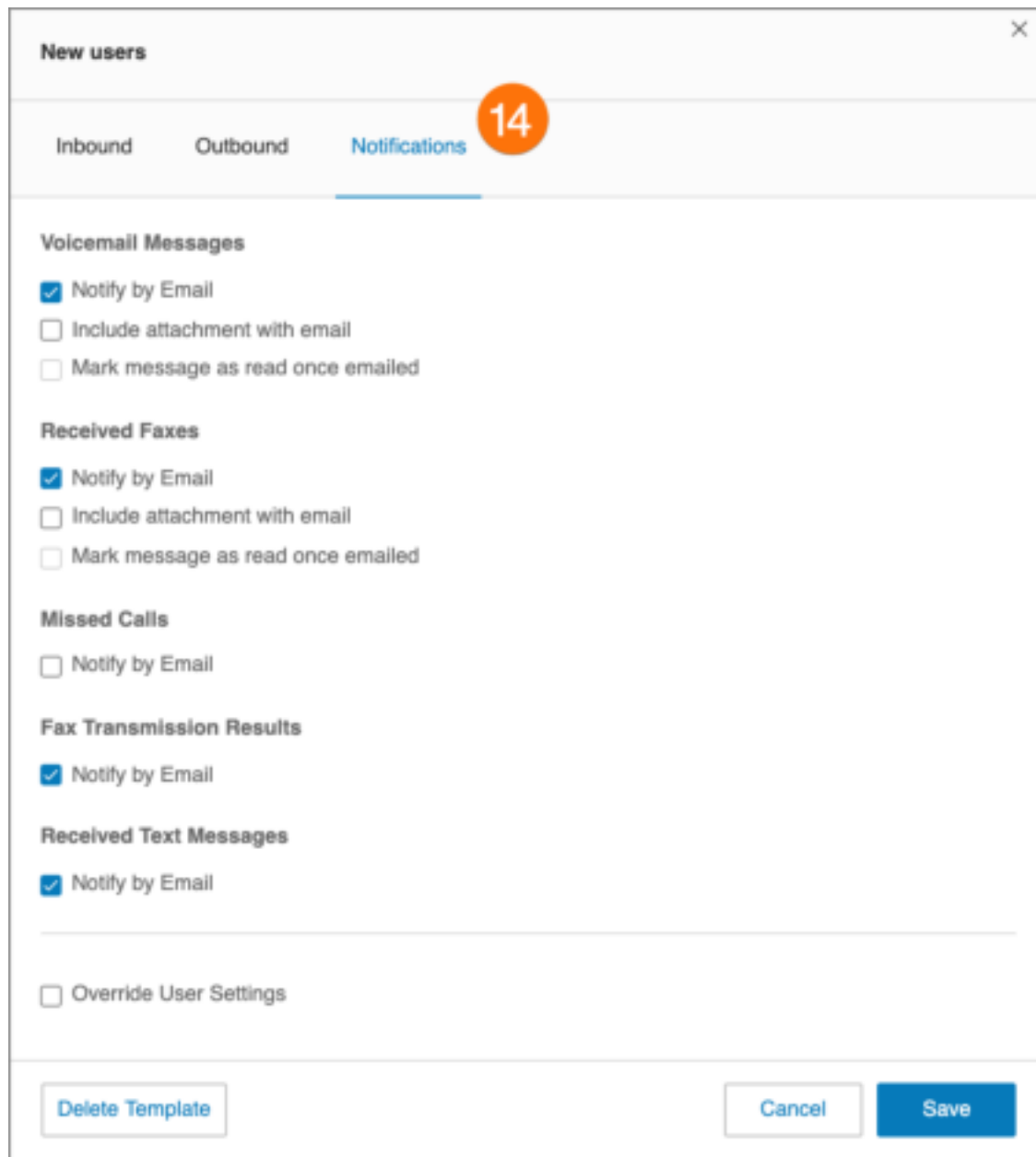
Fax Settings Panel:

- Caller ID:** A dropdown menu.
- Fax Settings:** A section with a dropdown menu.
- Cover Page Info:** A section with a note 'This information will be printed on your fax cover page.' and an 'Override User Settings' checkbox. Below this are several form fields:
 - Company:** Text input with placeholder 'e.g. John Doe'.
 - Country:** Dropdown menu with 'Select Country'.
 - Street Address:** Text input with placeholder 'e.g. 123 1st St SW'.
 - Additional address (Optional):** Text input with placeholder 'e.g. Suite 100 or Building A, Floor 2'.
 - City:** Text input with placeholder 'e.g. Atlanta'.
 - State/Province:** Dropdown menu with 'Select State/Province'.
 - Zip Code:** Text input with placeholder 'e.g. 30307'.
 - Phone Number:** Text input with placeholder '(800) 777-7777 - Main Company Number' and an 'Edit' button.
 - Fax Number:** Text input with placeholder '(800) 777-7777 - Main Company Number' and an 'Edit' button.
 - Cover Page:** A dropdown menu with 'None' and a 'Select' button.
- Faxes Sent via Email:** A section with a note 'To enable sending faxes via email from additional email addresses, enter them here. To send a fax via email, send the fax via [faxcenter@rockya.com](#).' and a checkbox 'Send cover page when email subject is blank.' with 'On' and 'Off' options.

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 [X]

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 in the RingCentral Admin Portal:

- Screenshot 1:** Shows the 'Users' tab selected in the top navigation bar (Step 1). The 'Templates' link is highlighted in the left sidebar (Step 2).
- Screenshot 2:** Shows the 'Call Handling' section selected in the left sidebar (Step 3). The 'Add Call Handling Template' button is highlighted (Step 4).
- Screenshot 3:** Shows the 'New Template Name' field being populated with 'NewTemplate' (Step 5). The 'Next' button is highlighted (Step 6).
- Screenshot 4:** Shows the 'Caller ID' condition being selected (Step 7). The 'Next' button is highlighted (Step 8).
- Screenshot 5:** Shows the 'Action' being set to 'Transfer' (Step 9). The 'Save' button is highlighted (Step 10).

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 image consists of two screenshots from the RingCentral Admin Portal. The top screenshot shows the 'Users' tab with a table of users. The bottom screenshot shows the 'Select Template' dialog and the 'Apply Template Confirmation' dialog.

Top Screenshot: Users List

The 'Users' tab is selected. The 'Users with Extensions' section is active. The 'Apply Templates' button is highlighted. The table below shows the user list.

Status	Name	Number	Ext.	Role	Department	Site	Reg.	Actions
	Anton Lee	(833) 555-5555	1113	Marketing QA	Company		11/1/20	
	Ada Smith	(206) 555-5555	100	Marketing QA	Company		8/1/20	
	Allen Test	(706) 555-5555	11138	Marketing QA	Company		0/1/20	

Bottom Screenshot: Select Template Dialog

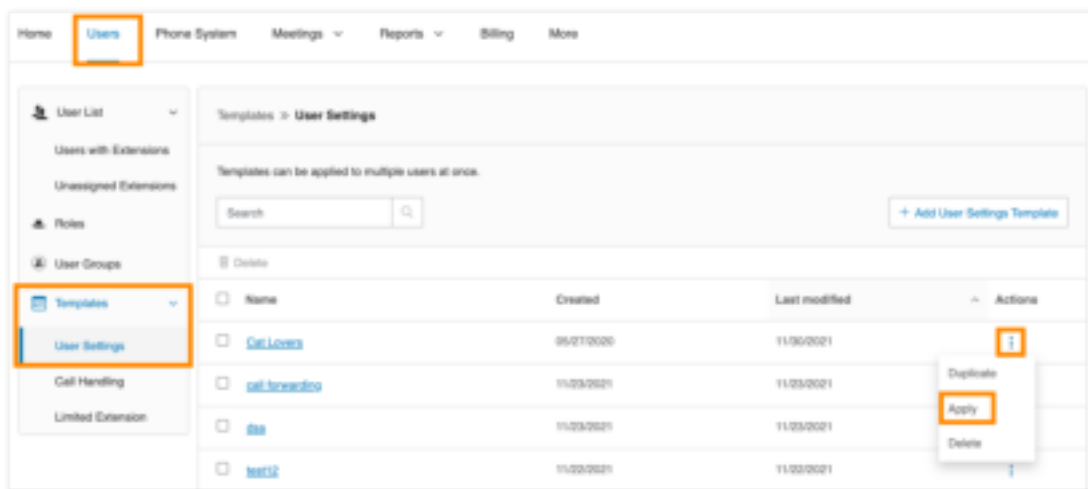
The 'Select Template' dialog is open. The 'Type' dropdown is set to 'User Settings'. The 'New users' template is selected. The 'Apply Template' button is highlighted.

Right Screenshot: Apply Template Confirmation Dialog

The 'Apply Template Confirmation' dialog is open. It asks for confirmation to make settings changes. The 'Continue' button is highlighted.

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

Site	Name/Type	Address	Site Code	Actions
	Main Site		11	
12026	Selling Site	234 MAIN ST, STE A, CHAMPELAIN, NY, 12026, United States	12	

Company Info

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

Managing Sites with Multi-Site Support

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

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and Sites. The left sidebar contains a 'Company Info' tab, which is highlighted with an orange box. Below this tab, there are several sub-tabs: Company Address, Caller ID Name, Directory Assistance, Phone Numbers, Auto-Registration, Groups, Phones & Devices, and Emergency Calling. The main content area shows the 'Company Address' tab selected. It contains a message: 'Company Address information will be used for publishing to Directory Listing if this service is available for your account.' Below this message are several input fields: 'Company Name' (with the text 'Shoreland Farm Company' entered), 'City' (empty), 'Company Address' (empty), 'State/Province' (with a dropdown menu showing 'Select'), and 'Zip Code' (empty). A 'Save' button is located at the bottom right of the form.

Company address

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

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

The screenshot displays the RingCentral Admin Portal interface for 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) and 'Company Address' (3). The main content area is titled 'Company Address' and contains the following fields:

- Company Name** (4): Strickland Panes Company
- City**: Arlen
- Company Address**: 135 Los Gatos Road
- State/Province**: Texas
- Zip Code**: 78104

A 'Save' button is located at the bottom right (5).

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, a navigation bar includes links for Home, Users, Phone System (highlighted with an orange circle 1), Meetings, Reports, Billing, and More. On the right of the navigation bar, there are links for Admin Portal and a user profile icon labeled AG. A left-hand sidebar contains a list of menu items: Company Info (highlighted with an orange circle 2), Company Address, Caller ID Name (highlighted with an orange circle 3), Directory Assistance, Phone Numbers, Auto-Receptionist, Groups, Phones & Devices, and Emergency Calling. The main content area is titled 'Company Info > Caller ID Name'. It contains a descriptive text: '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 (highlighted with an orange circle 4) containing the text 'RINGCENTRAL'. At the bottom right of the form, there is a blue 'Save' button (highlighted with an orange circle 5).

Directory Assistance

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

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

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

Home | Users | Phone System | **Emergency Services** | Reports | Settings | About

Emergency Services

The following information will be submitted to Emergency Services:

Business Name: (255) 255-1234

Business Address: [Field]

City: [Field]

State: [Field]

Zip: [Field]

Emergency Services: [Field]

Emergency Services: [Field]

Business Name: [Field]

Business Address: [Field]

City: [Field]

State: [Field]

Zip: [Field]

Save

Home | Users | Phone System | **Emergency Services** | Reports | Settings | About

Emergency Services

The following information will be submitted to Emergency Services:

Business Name: (255) 255-1234

Business Address: [Field]

City: [Field]

State: [Field]

Zip: [Field]

Emergency Services: [Field]

Emergency Services: [Field]

Business Name: [Field]

Business Address: [Field]

City: [Field]

State: [Field]

Zip: [Field]

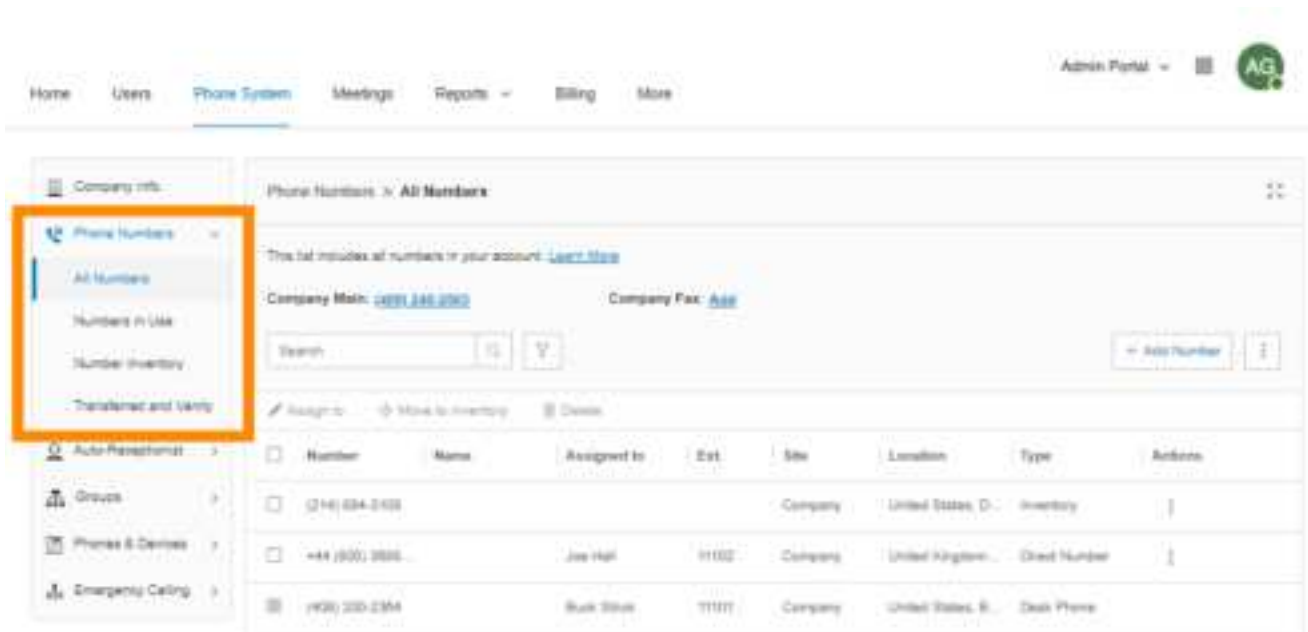
Save

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.



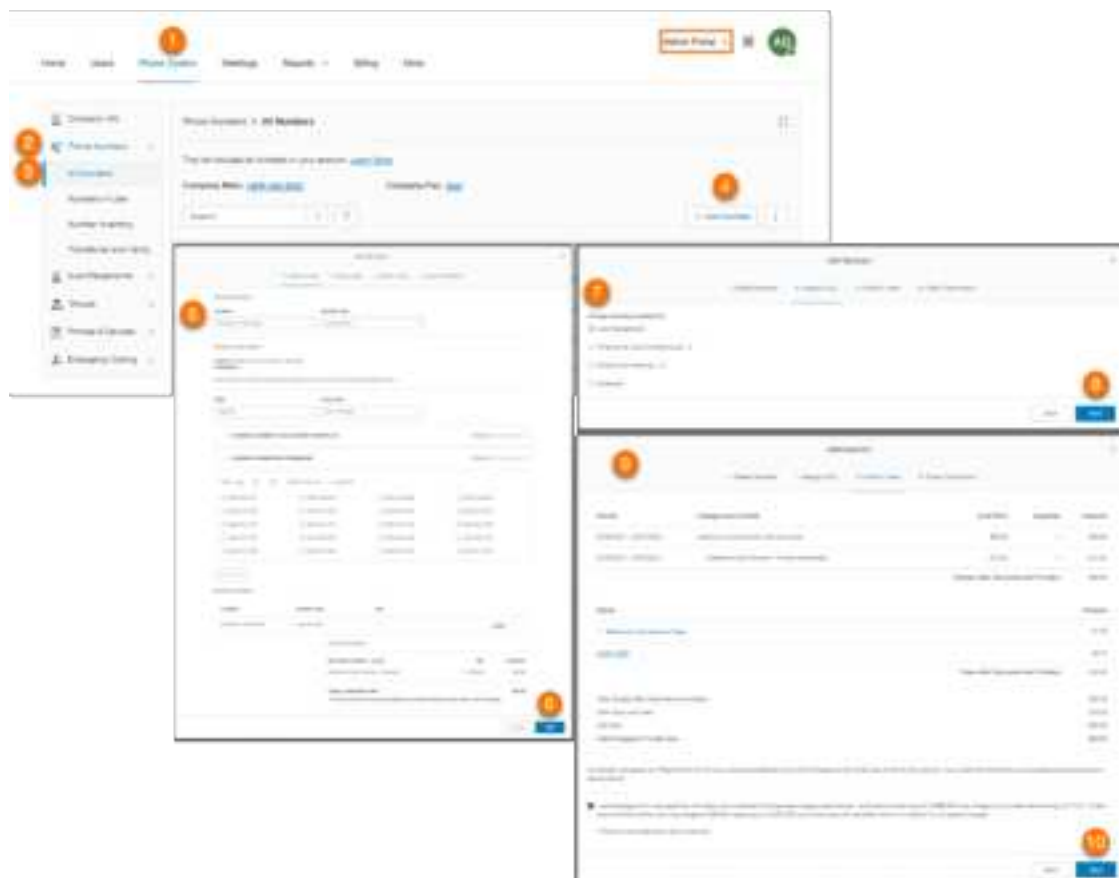
The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System (selected), Meetings, Reports, Billing, and More. The right side shows the Admin Portal logo and a user profile icon. The left sidebar contains a list of navigation items: Company info, Phone Numbers (selected), Auto-Responder, Groups, Phones & Devices, and Emergency Calling. The Phone Numbers section is expanded, showing sub-tabs: All Numbers (highlighted with an orange box), Numbers in Use, Number Inventory, and Transferred and Vanity. The main content area is titled 'Phone Numbers > All Numbers' and includes a search bar, a '+ Add Number' button, and a table of phone numbers. The table has columns for Number, Name, Assigned to, Ext., Site, Location, Type, and Actions. Three numbers are listed:

Number	Name	Assigned to	Ext.	Site	Location	Type	Actions
(214) 694-2433				Company	United States, D...	Inventory	
+44 (200) 388...		Joe Hall	11002	Company	United Kingdom...	Direct Number	
(920) 200-2354		Buck Stone	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**.



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**.

The screenshot displays the RingCentral Admin Portal interface for the Phone System. The top navigation bar includes links for Home, Users, Phone System (highlighted with callout 1), Meetings, Reports, Billing, and More. The right side of the header shows the Admin Portal logo and a user profile icon.

The left sidebar contains a menu with the following items: Company Info, Phone Numbers (highlighted with callout 2), All Numbers (highlighted with callout 3), Numbers in Use, Number Inventory, Transferred and Unassigned, Auto-Responder, Groups, Phones & Devices, and Emergency Calling.

The main content area is titled "Phone Numbers > All Numbers". It includes a sub-header "This list includes all numbers in your account. Last 1000" and a section for "Company Main: 1800.240.0700" with a "Company Fax: Add" link. A search bar is present, and an "Add Number" button is highlighted with callout 4.

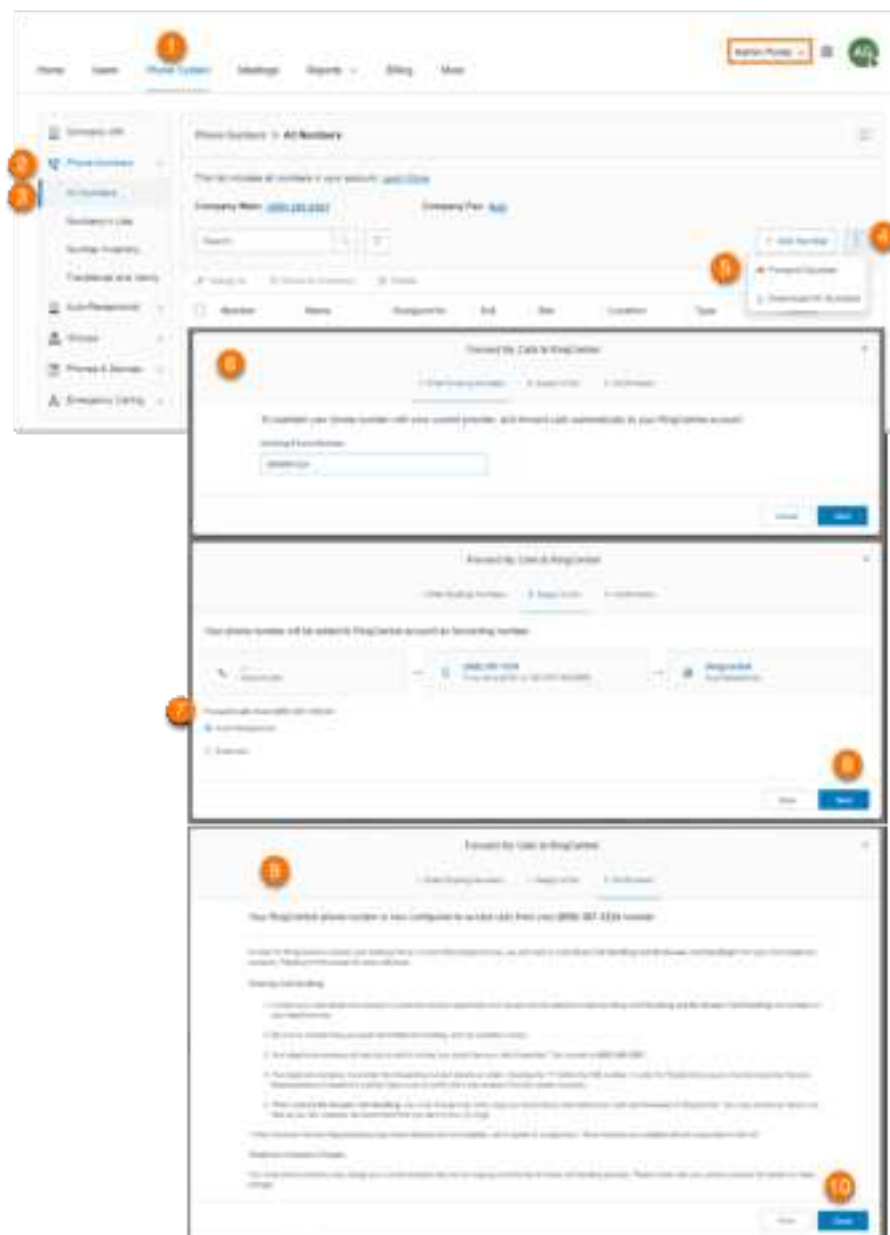
Below the search bar, there are two overlapping panels. The left panel, titled "Add Number", is highlighted with callout 5 and contains a form for adding a new number. The right panel, titled "All Numbers", is highlighted with callout 7 and displays a table of numbers. The table has columns for "Area", "Area Code", "Number", "Extension", "Status", and "Assigned". The bottom right corner of the right panel is highlighted with callout 8.

At the bottom of the interface, there is a panel titled "All Numbers" (highlighted with callout 9) that shows a detailed view of a specific number, including its status and associated settings. The bottom right corner of this panel is highlighted with callout 10.

Forwarding a number

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

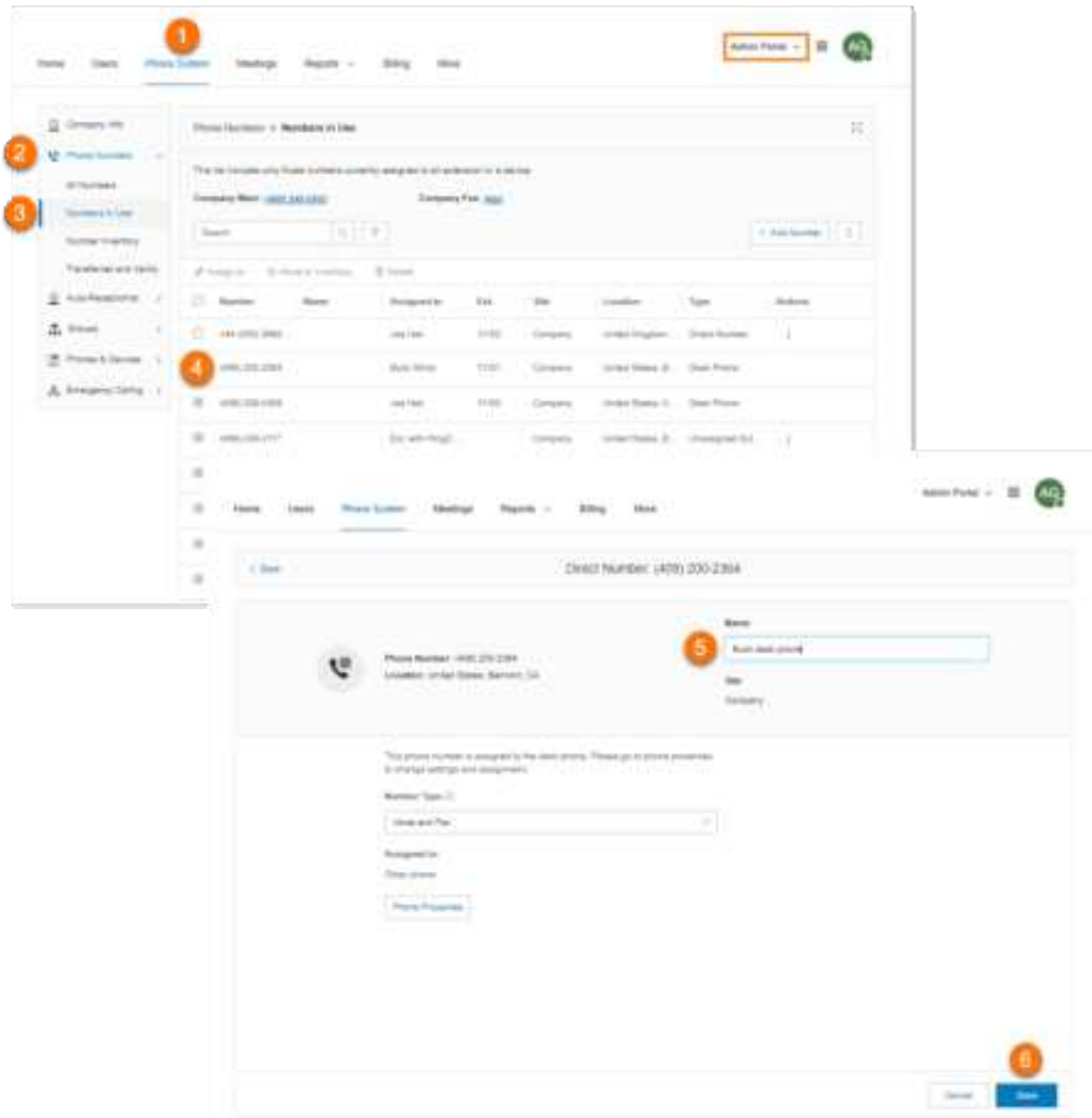
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phone Numbers**.
3. Click **All Numbers**.
4. Click the more three-dot icon beside **Add Number**.
5. Select *Forward Number*.
6. Enter your existing phone number and click **Next**.
7. Select where you would want to forward the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



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**.



Viewing unassigned numbers

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

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

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

The screenshot shows the RingCentral Admin Portal interface. At the top, the navigation bar includes links for Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Billing, and More. On the right of the navigation bar, there is an 'Admin Portal' button and a user profile icon labeled 'AD'. Below the navigation bar, the left sidebar contains a list of menu items: Company Info, Phone Numbers (highlighted with a red circle 2), All Numbers, Numbers in Use, Number Inventory (highlighted with a red circle 3), Transferred and Verify, Auto Receptionist, Transfer, Phones & Devices, and Emergency Calling. The main content area is titled 'Phone Numbers in Number Inventory' and includes a description: 'This Number Inventory includes all numbers which are not assigned to a user extension or device.' Below this description is a search bar and a '+ Reserve Numbers' button. A filter section shows 'Locations' and 'Size' dropdown menus (highlighted with a red circle 4). Below the filters is a table with the following data:

Number	Name	Site	Location	Actions
(214) 294-0400		Company	United States, Dallas, TX	
(800) 423-0759		Company	United States, Alhambra, Palo Alto, CA	
+44 (1224) 212...		Company	United Kingdom, Aberdeen, ABE	

The table is highlighted with a red circle 5. The 'Actions' column for each row contains a vertical ellipsis icon.

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*.

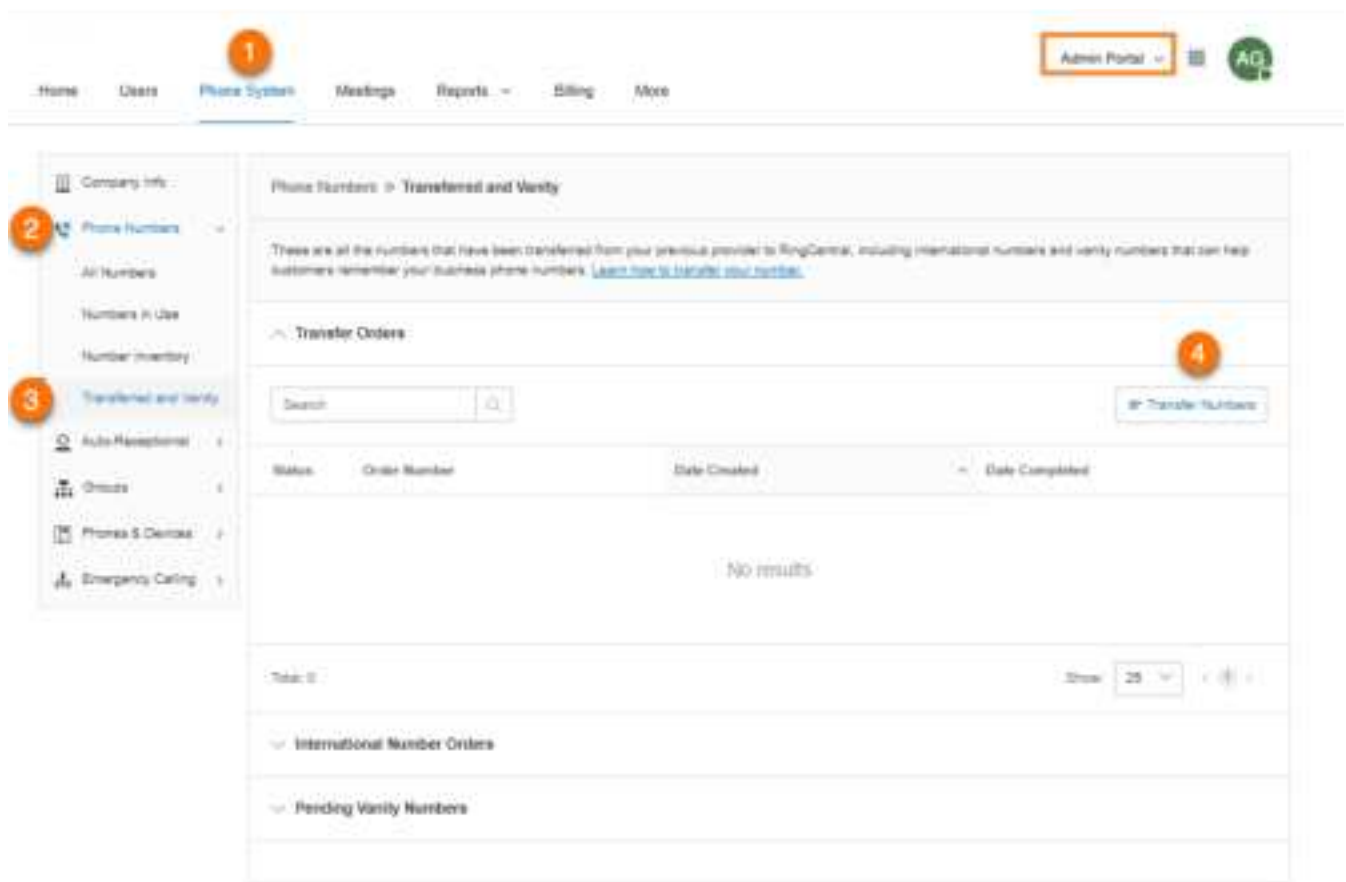
The screenshot shows the RingCentral Admin Portal interface. At the top, the 'Phone System' tab is selected, indicated by a red circle with the number 1. In the left sidebar, 'Phone Numbers' is highlighted with a red circle 2, and 'All Numbers' is highlighted with a red circle 3. The main content area is titled 'Phone Numbers in All Numbers'. It includes a search bar with a filter icon (red circle 4) and a 'Types' dropdown menu (red circle 5) that is open, showing 'Unassigned Extension' selected (red circle 6). The table below lists various phone numbers with columns for Number, Name, E40, Site, Location, Type, and Actions.

Number	Name	E40	Site	Location	Type	Actions
(303) 380-1094			Company	Canada, Antigonish	Company Number	
(440) 330-0384		11101	Company	United States, IL	Desk Phone	
(408) 330-0408		11102	Company	United States, IL	Desk Phone	
+44 (20) 45225...		11101	Company	United Kingdom...	Direct Number	
+44 (20) 3895...		11102	Company	United Kingdom...	Direct Number	
(888) 950-1234			Company	Roma	Forwarded	
(214) 964-0108			Company	United States, IL	Inventory	

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.



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 image displays two screenshots of the RingCentral Admin Guide interface, specifically the 'Auto-Receptionist' settings page. The top screenshot shows the 'General Settings' section, which includes a 'New Receptionist' button highlighted with an orange box. The bottom screenshot shows the 'New Receptionist' form, which includes a 'New Receptionist' button highlighted with an orange box. The interface is divided into a left sidebar with navigation links and a main content area with settings and a form.

Top Screenshot: General Settings

- Company Info**
- Phone Numbers**
- New Receptionist** (highlighted)
- General Settings**
- Call History**
- Call Logs**
- Transfer & Forward**
- Transfer & Forward**
- Emergency Calling**

General Settings

Create your own Auto-Receptionist for your Phone System. Customized your system for effective call management. [Learn More](#) [Get Started](#)

- Emergency Number**
US: 911
- API Settings**
Operation Date: 1/1/2020 10:00 AM - 10:00 PM
- Start by Name Searching**
On
- Call Recording**
Unrecorded: On
Recorded: On
- Search & Retrieval on Call Page Available**
On
- Regional Settings**
Time Zone: GMT-07:00 Pacific Time (PST & EDT & Standard)

Bottom Screenshot: New Receptionist Form

- Company Info**
- Phone Numbers**
- New Receptionist** (highlighted)
- General Settings**
- Call History**
- Call Logs**
- Transfer & Forward**
- Transfer & Forward**
- Emergency Calling**

New Receptionist

Create your own Auto-Receptionist for your Phone System. Customized your system for effective call management. [Learn More](#) [Get Started](#)

Search: 1234

API **Phone Numbers** **Start Date**

[View Info](#)

1/1/2020 10:00 AM

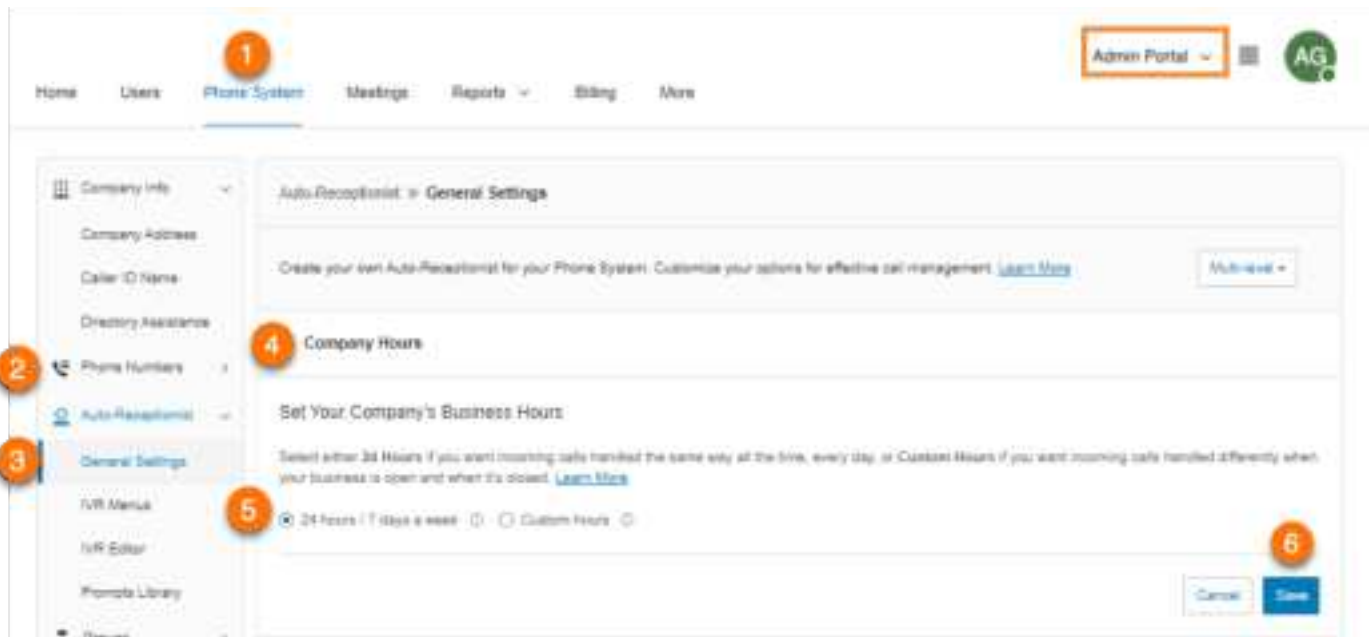
- Emergency Number**
US: 911
- API Settings**
Operation Date: 1/1/2020 10:00 AM - 10:00 PM
- Start by Name Searching**
On
- Call Recording**
Unrecorded: On
Recorded: On
- Search & Retrieval on Call Page Available**
On
- Regional Settings**
Time Zone: GMT-07:00 Pacific Time (PST & EDT & Standard)

Company business hours

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

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

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



Company call handling

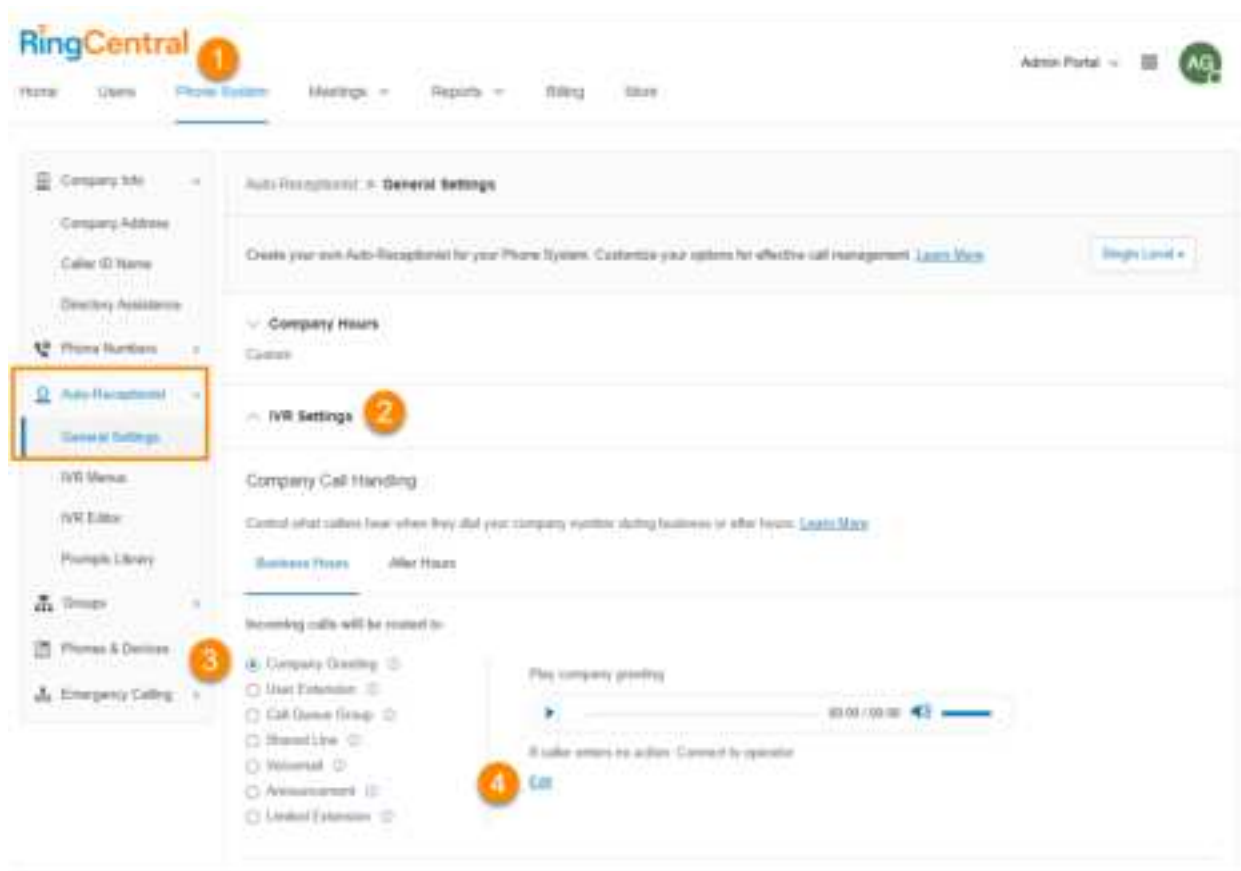
Company Call Handling provides call handling options for single-level IVR accounts. This controls what callers hear when they dial your company number/s during business or after hours. You can configure separate settings for business hours and after hours.

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

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

Company greeting

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



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**.

[illegible]

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 Menu
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. 1000, Ext. 101

Directory-Name Directory
On

Call Recording
On-demand: On
Automatic: On

Block notifications on toll-free numbers
On

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
☒ 12h (AM/PM) ☐ 24h

Home Country Code
United States (1)

Main Language
English (U.S.)

Greeting Language
English (U.S.)

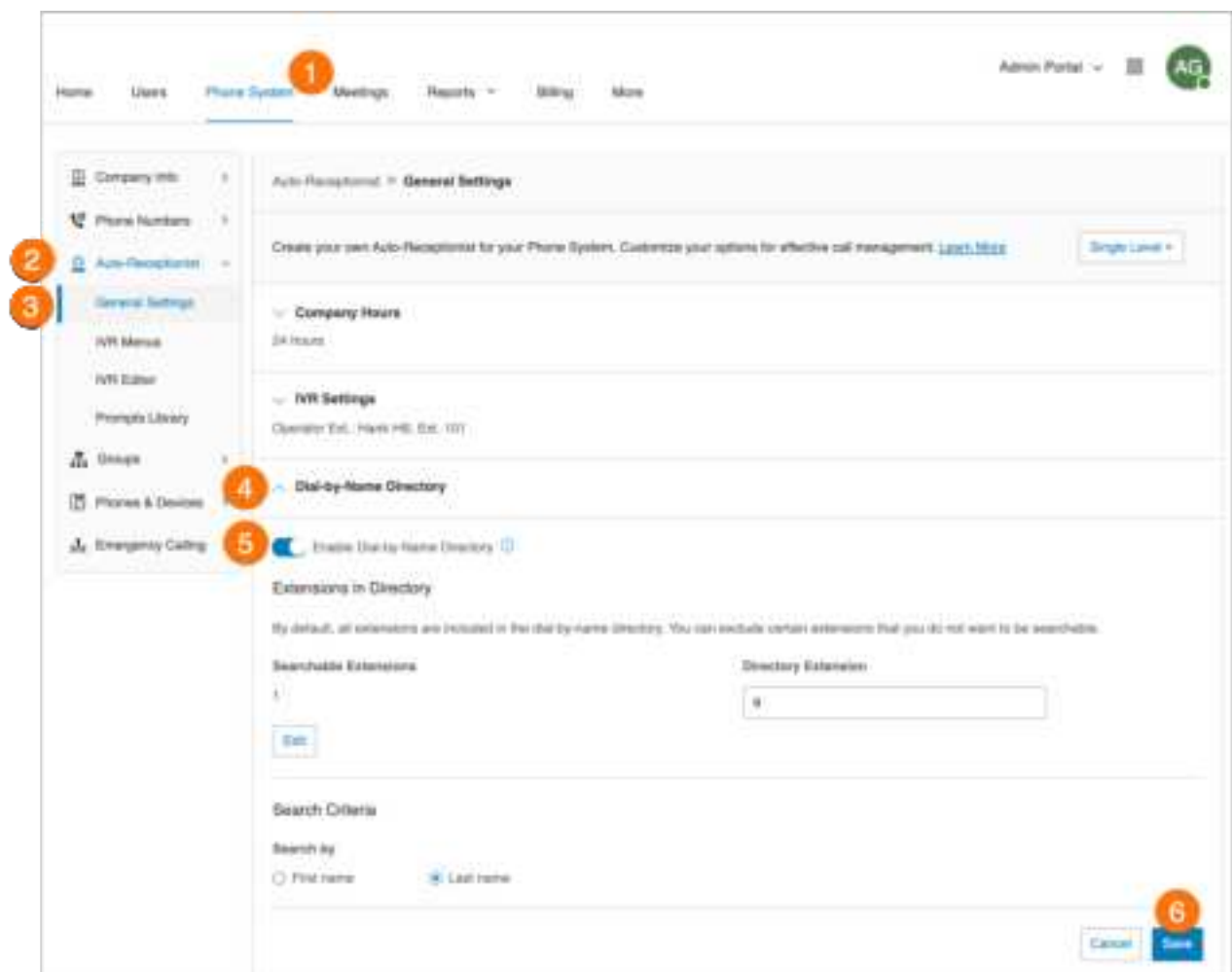
Regional Format
United States

Cancel Save

Dial-by-name directory

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

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



Operator extension

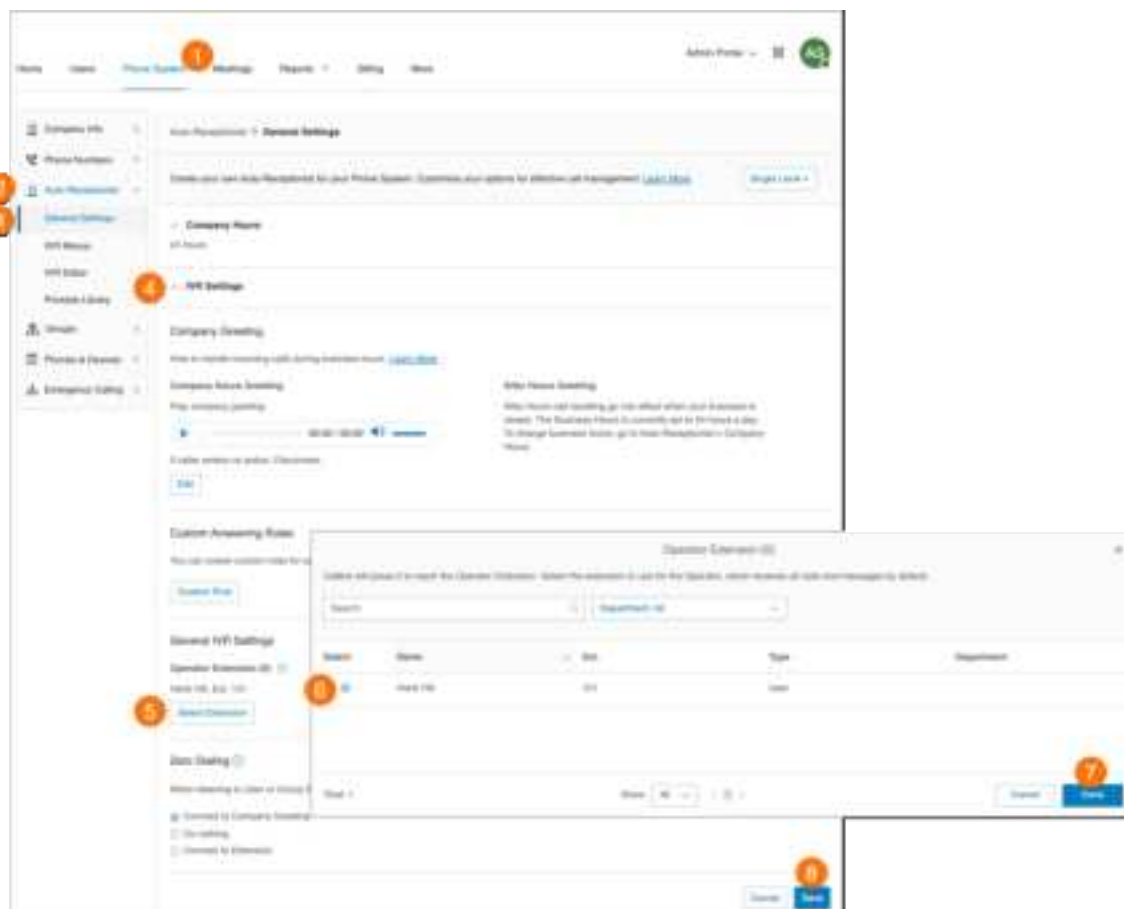
Select the extension to use for the operator, which receives all calls and messages by default. The operator extension is 101 by default.

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.



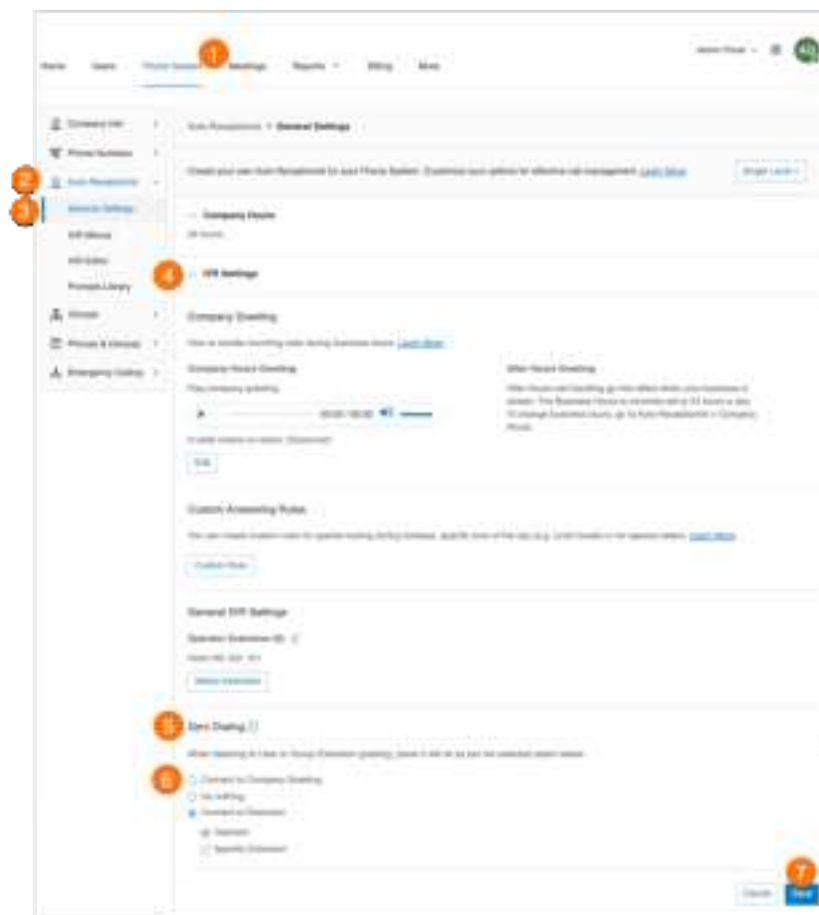
Zero dialing

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

To set zero dialing:

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

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

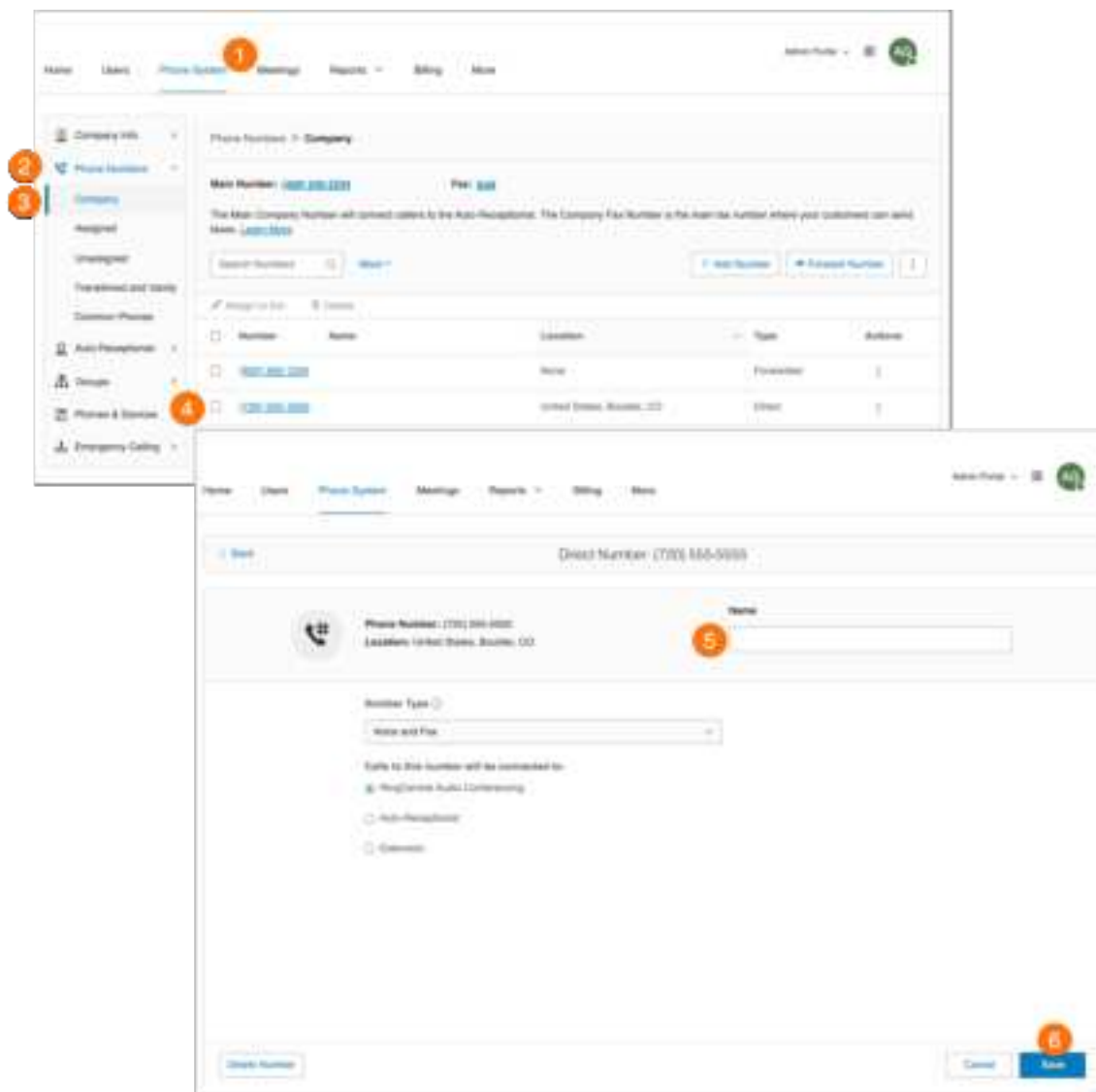


Name or label definitions

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

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

Note: This option is available for RingCentral Ultimate users.



On-demand call recording

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

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

Choosing an on-demand call recording announcement

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

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

The screenshot displays the RingCentral Admin Console interface for configuring the Auto-Receptionist. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The left sidebar contains a list of settings categories: Company Info, Phone Number, Auto-Receptionist, General Settings, IVR Menu, IVR Editor, Prompt Library, Groups, Phones & Devices, and Emergency Calling. The main content area is titled "Auto-Receptionist > General Settings".

General Settings Section:

- Company Hours:** 24 hours.
- IVR Settings:** Operator Ext., Hunt PR, Ext. Toll.
- Display-Name Directory:** On.

Call Recording Section:

- On-demand Call Recording:** Enabled. A toggle switch is turned on.
- Announcement on Start:** A time range selector is set to 00:00 / 00:00.
- Announcement on Stop:** A time range selector is set to 00:00 / 00:00.

Modals:

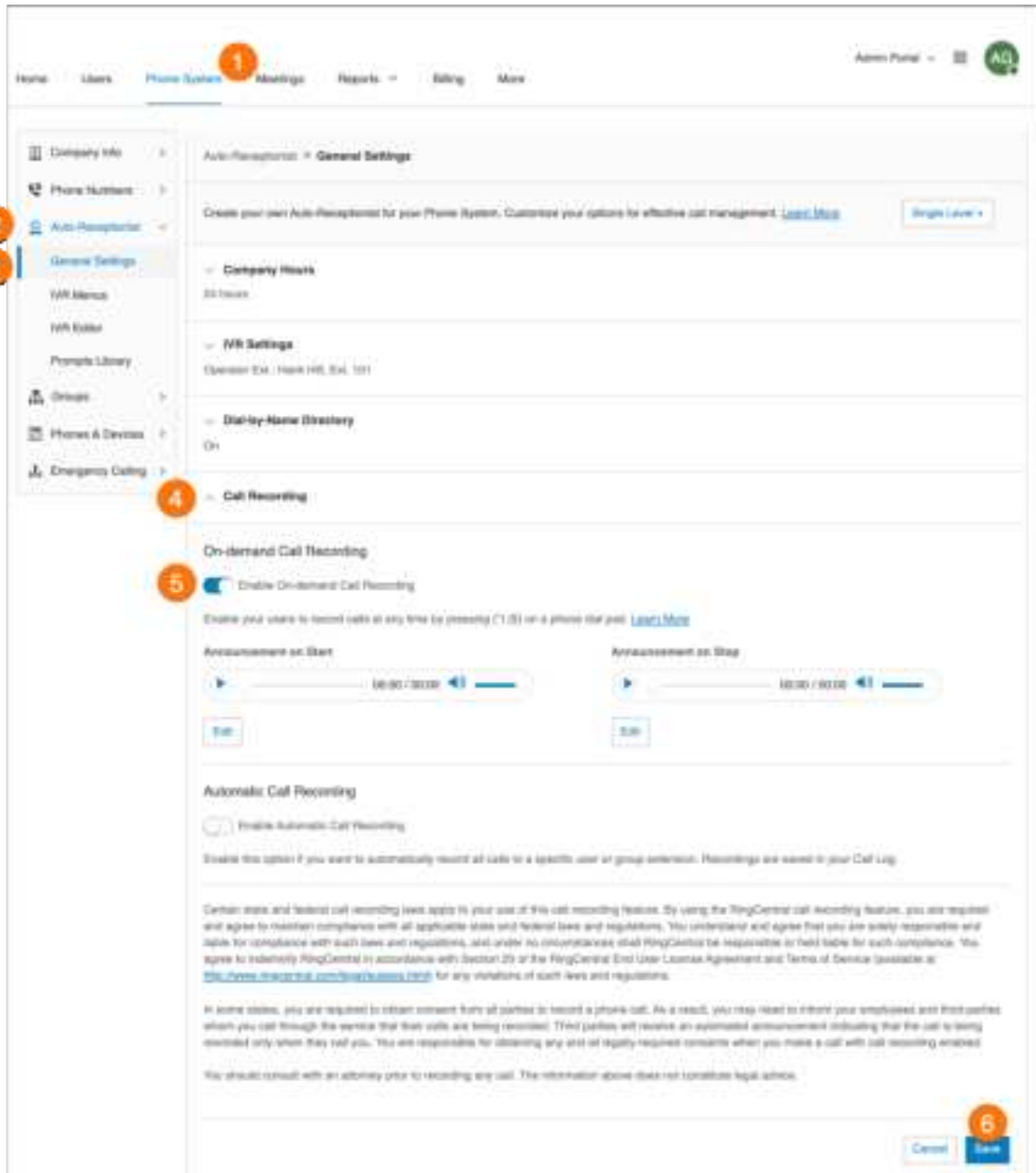
- Announcement on Start Modal:** Shows "Set Greeting" (Default), "View In" (English (US)), and a text prompt: "This call is being recorded. If you do not wish to be recorded, please disconnect at this time." It includes a time range selector (00:00 / 00:00) and buttons for "Cancel" and "Done".
- Announcement on Stop Modal:** Shows "Set Greeting" (Default), "View In" (English (US)), and a text prompt: "This call has been recorded." It includes a time range selector (00:00 / 00:00) and buttons for "Cancel" and "Done".

Annotations:


1. Phone System tab in the top navigation bar.
2. Auto-Receptionist link in the left sidebar.
3. General Settings link in the left sidebar.
4. Call Recording section header.
5. Time range selector for "Announcement on Start".
6. "Done" button for the "Announcement on Start" modal.
7. "Done" button for the "Announcement on Stop" modal.

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**.



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

Admin Portal 

Company Info > Auto-Receptionist > **General Settings**

Phone Number >

Auto-Receptionist > 2

General Settings 3

IVR Menu

IVR Editor

Prompt Library

Groups >

Phones & Devices >

Emergency Calling >

Call Recording 4

On-demand Call Recording

5 Enable On-demand Call Recording

Enable your users to record calls at any time by pressing C1 (5) on a phone that has [Learn More](#)

Announcement on Start

Announcement on Stop

00:00 / 00:00 00:00 / 00:00

End End

Automatic Call Recording

☐ Enable Automatic Call Recording

Enable this option if you want to automatically record all calls for a specific user or group extension. Recordings are saved to your Call Log.

Certain state and federal call recording laws apply to your use of this call recording feature. By using the RingCentral call recording feature, you are required and agree to maintain compliance with all applicable state and federal laws and regulations. You understand and agree that you are solely responsible and agree to indemnify RingCentral in accordance with Section 29 of the RingCentral End User License Agreement and Terms of Service (available at <https://www.ringcentral.com/legal/privacy.html>) for any violations of such laws and regulations.

In some states, you are required to obtain consent from all parties to record a phone call. As a result, you may need to inform your employees and third parties whom you call through the service that their calls are being recorded. Third parties will receive an automated announcement indicating that the call is being recorded only when they call you. You are responsible for obtaining any and all legally required consents when you make a call with call recording enabled.

You should consult with an attorney prior to recording any call. The information above does not constitute legal advice.

Cancel Save 6

Interactive Voice Response (IVR)

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

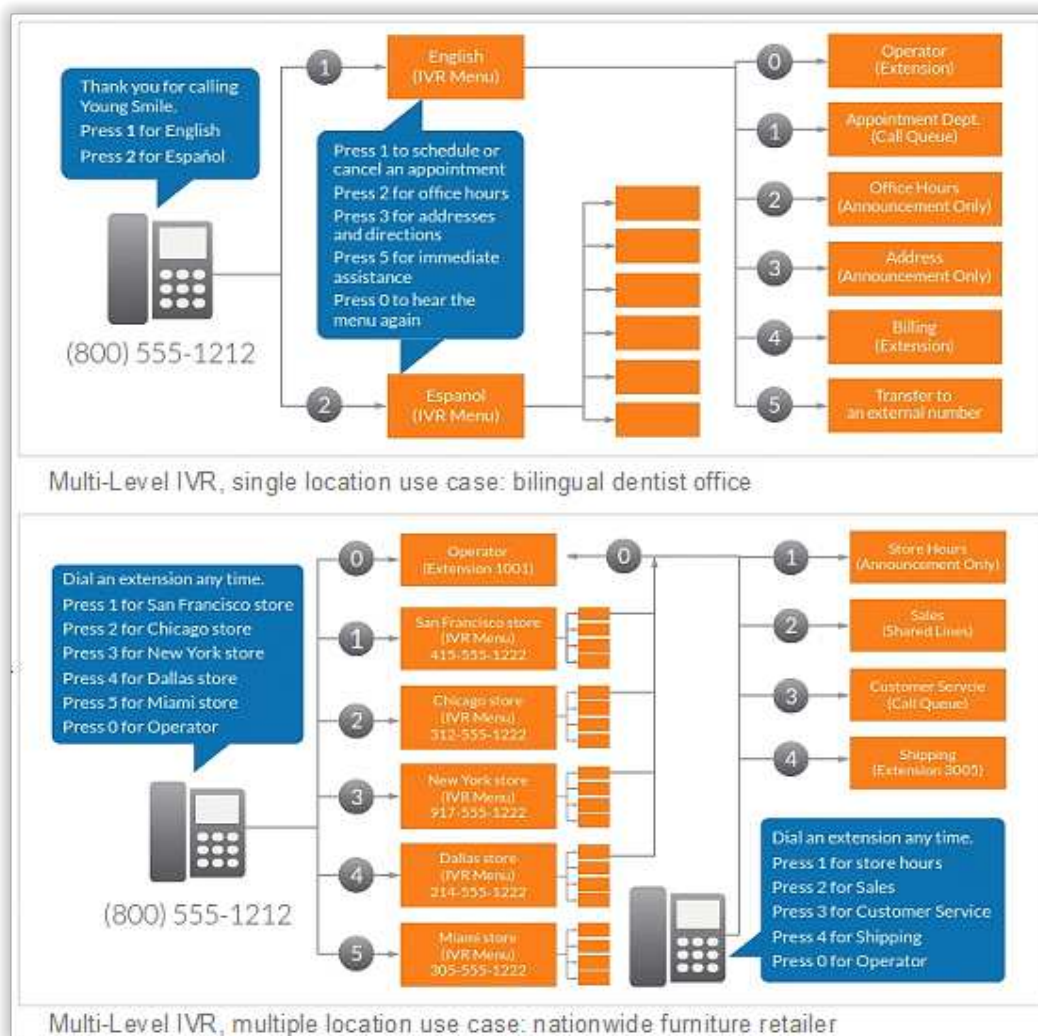
Multi-level IVR options

Single-location IVR example

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

Multiple-location IVR example

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

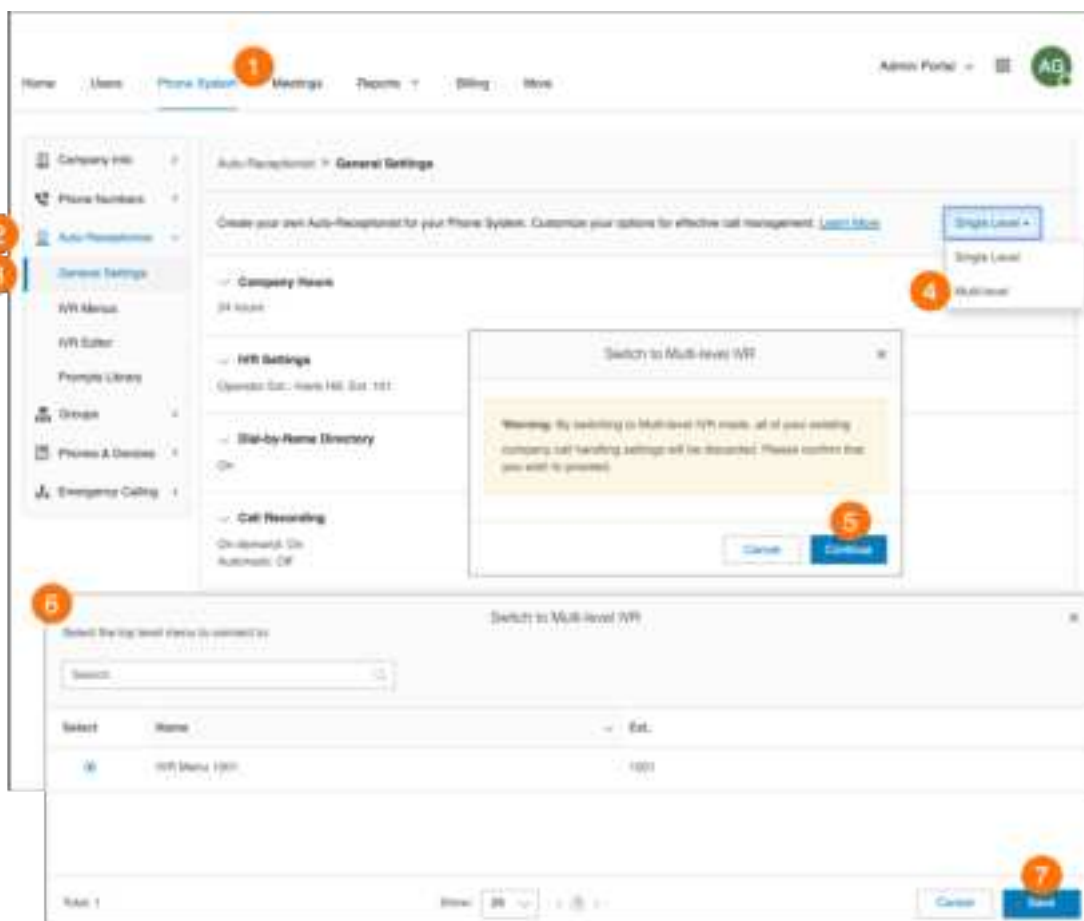


Switching to multi-level IVR mode

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

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

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



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** 1 Meetings Reports Billing More Admin Portal AG

Company Info Phone Numbers 2 Auto-Receptionist 3 General Settings 4 IVR Menu 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-level menu:

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 goes 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 hours) or for special callers. [Learn More](#)
[Custom Rule](#)

General IVR Settings
Specify general navigation keys. All the menus will follow these settings unless you override 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.
Node 145, Ext. 100
[Select Extension](#)

[Cancel](#) [Save](#) 7

IVR Editor

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

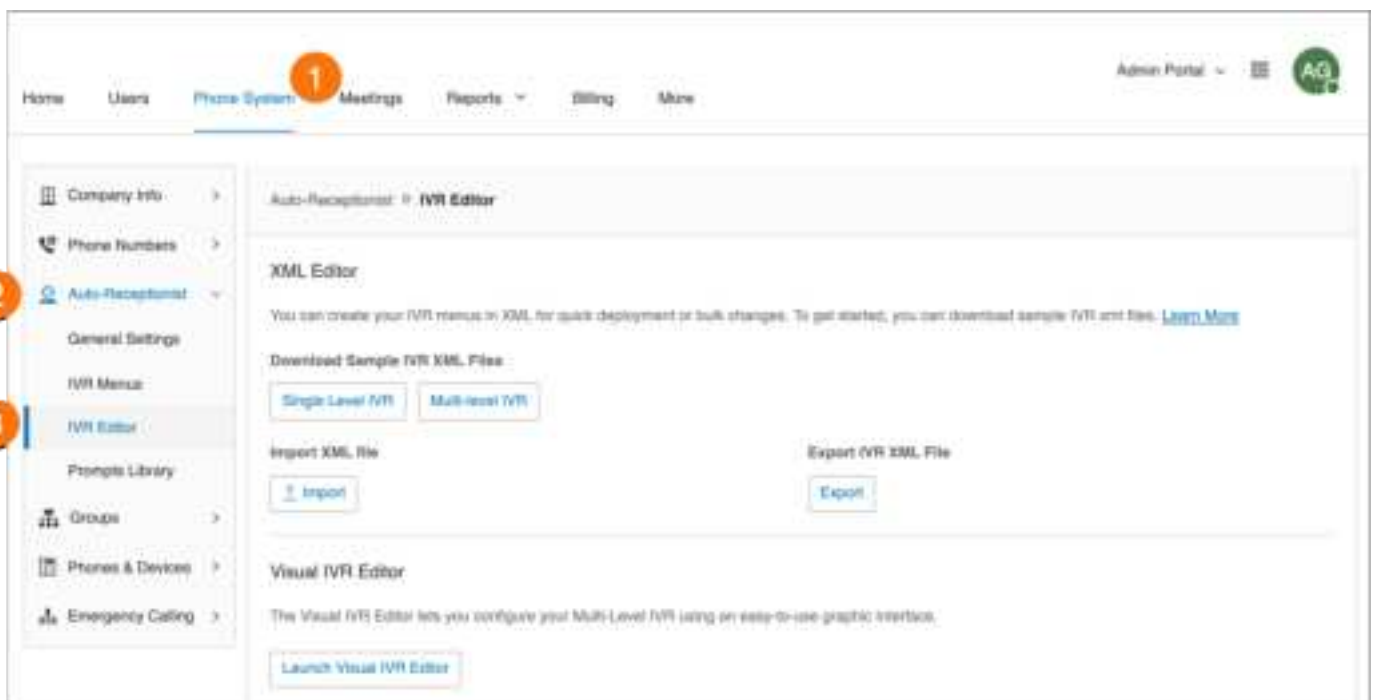
Auto-Receptionist consists of three parts that help you configure your IVR: IVR Menus, IVR Editor, Prompts Library. Use the IVR tool to:

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

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

Access the IVR Tool by using the following steps:

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



IVR menus

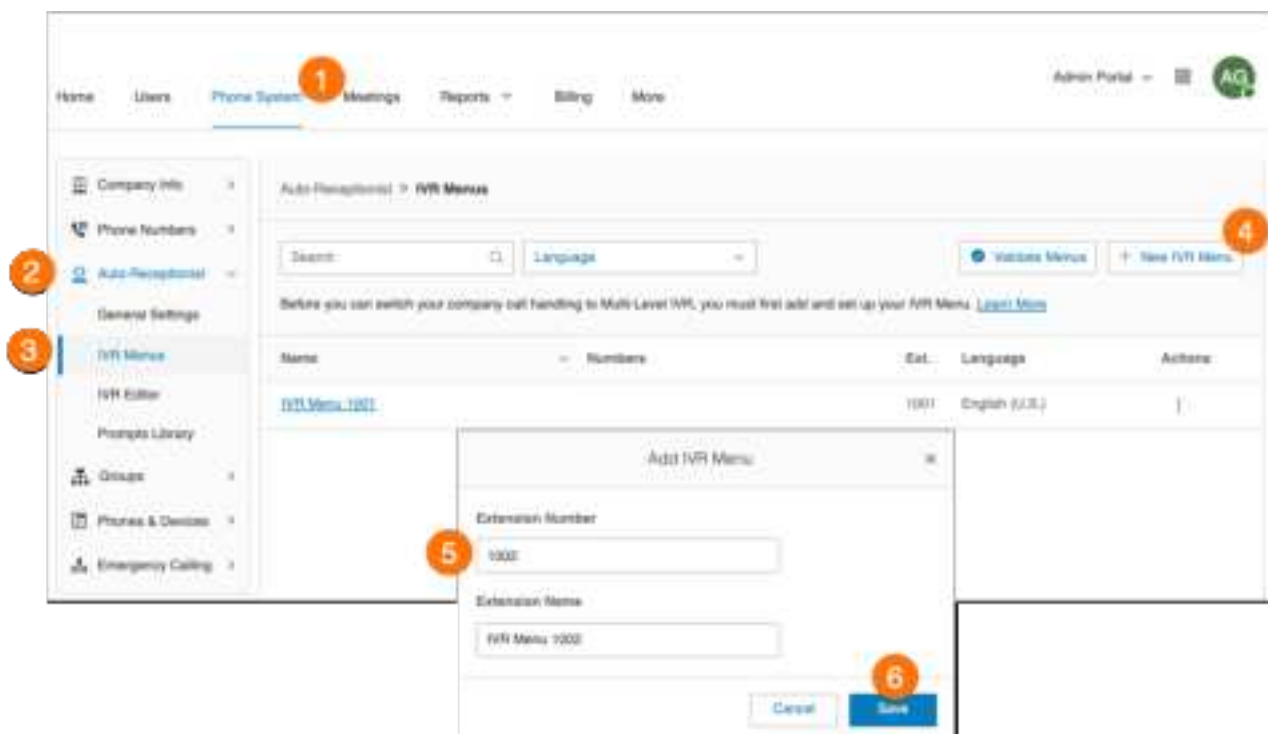
RingCentral offers various tools to help manage and create IVR (interactive voice response) menus. Administrators can add new IVR menus as shown in the following instructions, use the Visual IVR Editor, or import an XML file.

Adding an IVR menu group

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

The new IVR Menu appears listed under IVR Menus.

Note: Available for MVP Premium and Ultimate users only.



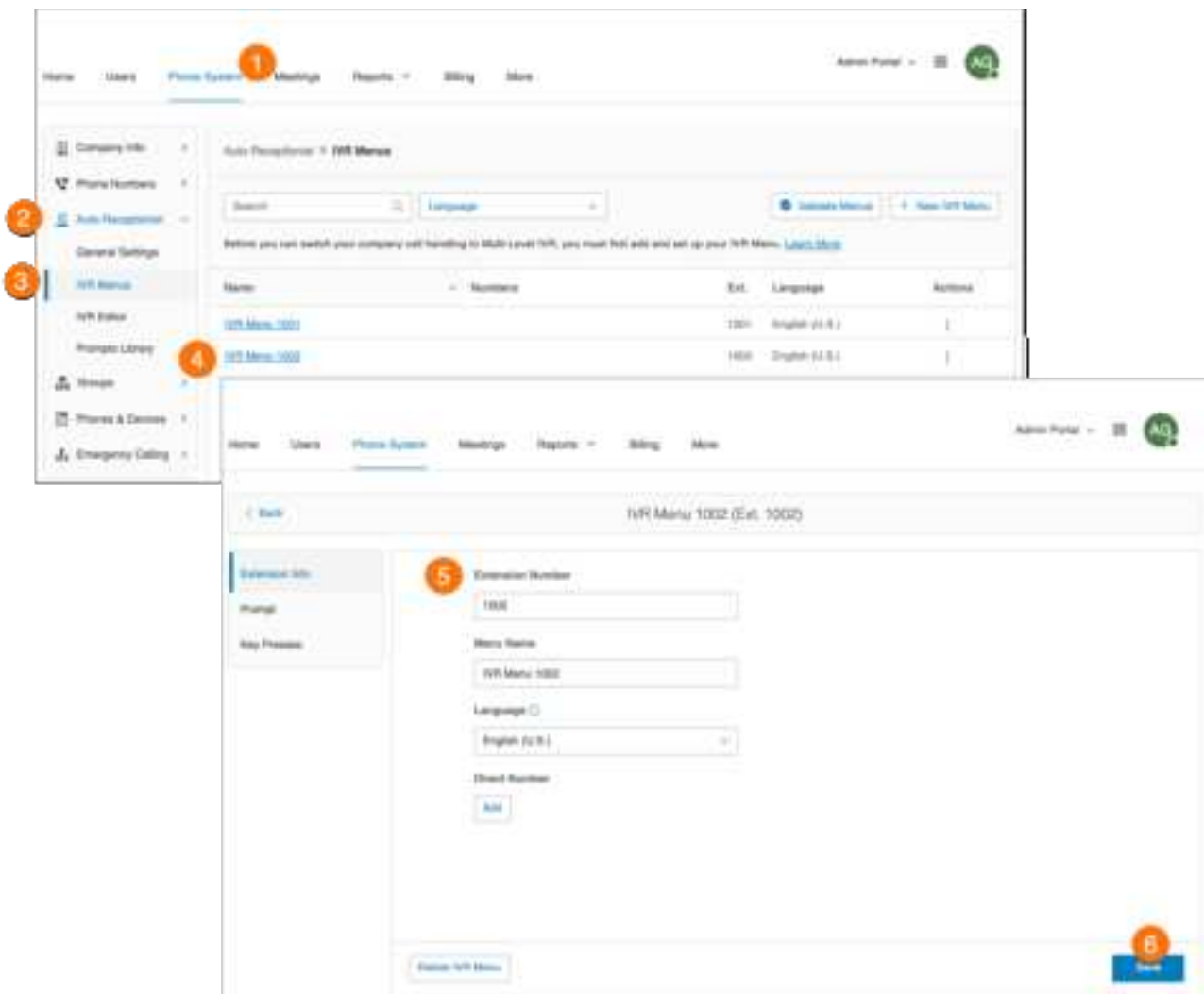
Configuring an IVR menu

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.

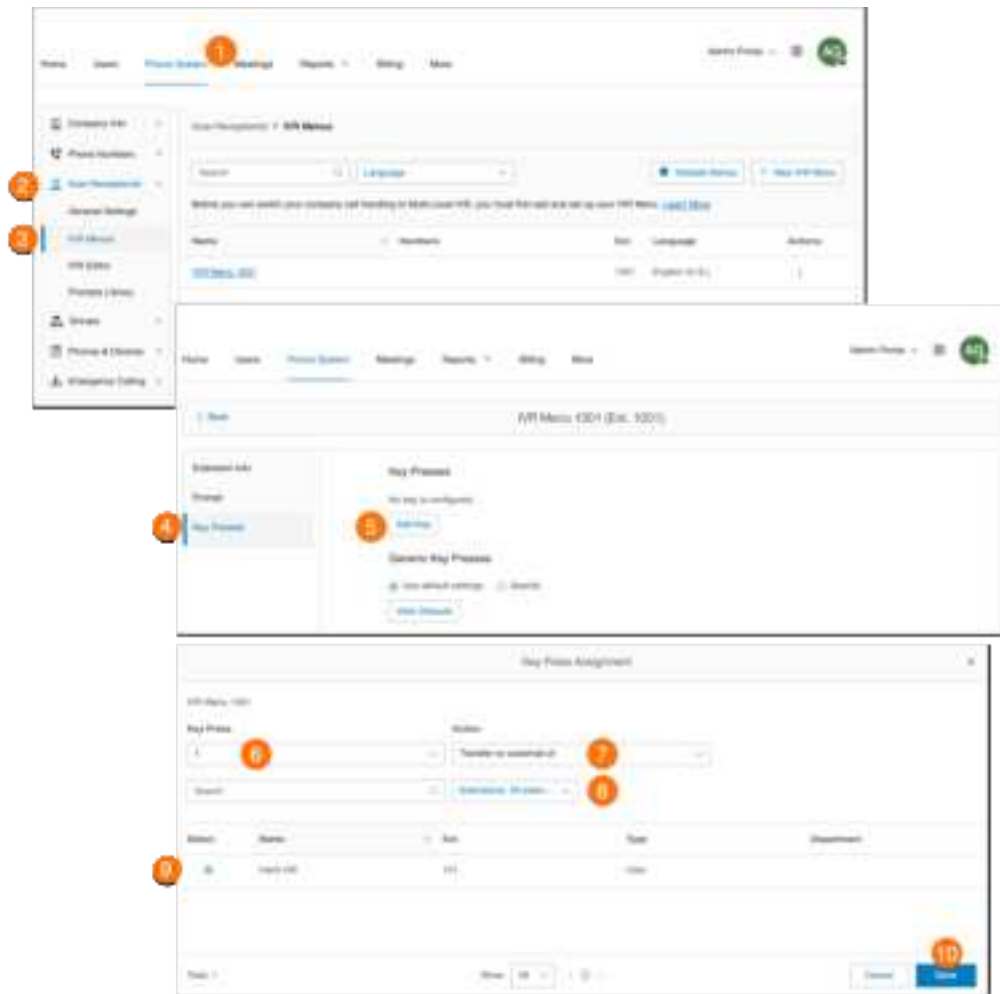
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus**.
4. Select an existing **IVR Menu**.
5. Enter the **Extension Number**, **Extension Name**, and set the **Language**.
 - Click **Add** if you would like to add a **Direct Number**.
 - If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



Adding Key Presses

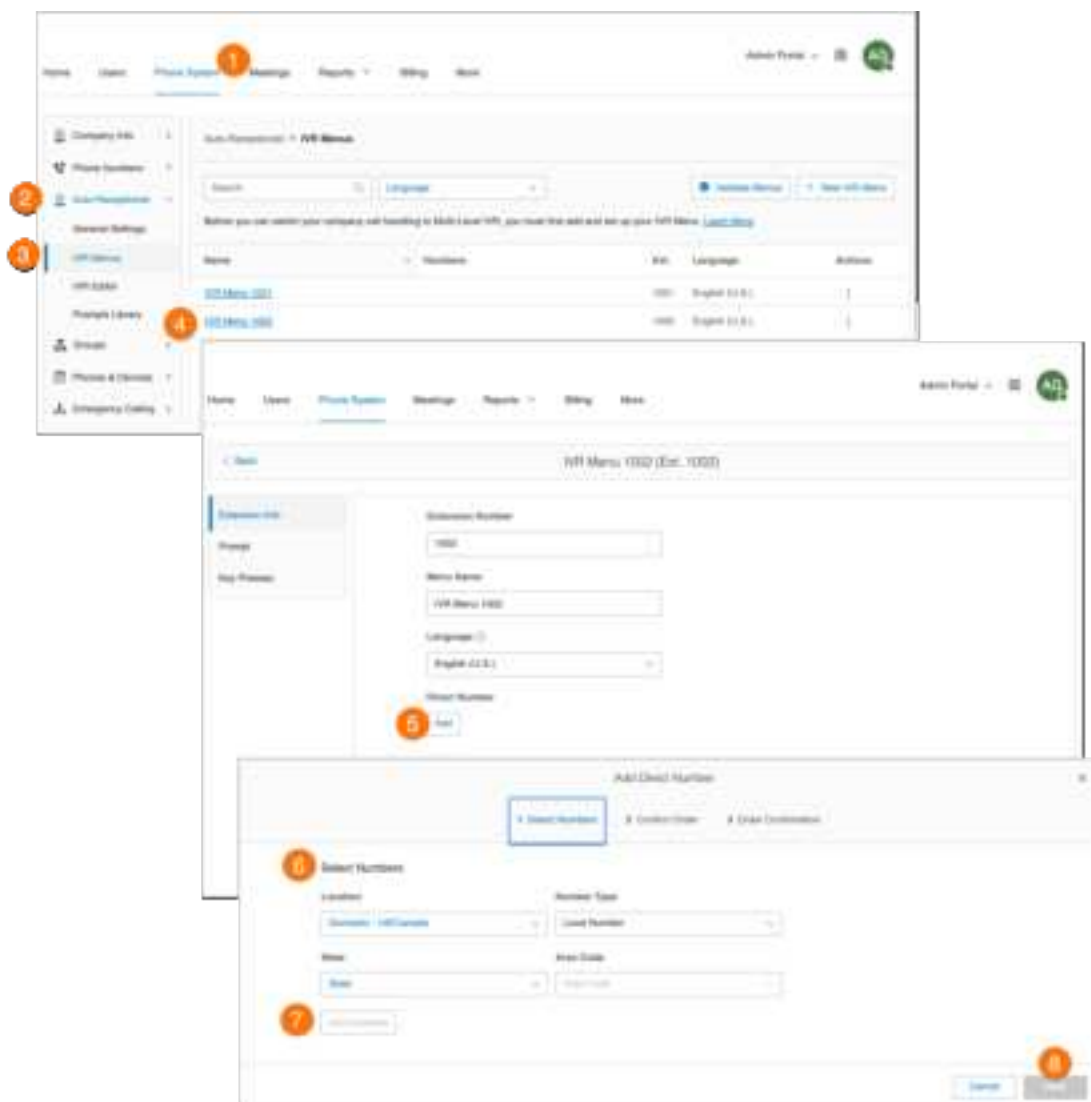
Before you can switch your company call handling to multi-level IVR, you must first add and set-up your IVR menu. The Auto-Receptionist greets callers with a recorded message when they call your company. Your Auto-Receptionist is initially set to play a default greeting with your company name using text-to-speech 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**.



Adding a direct number

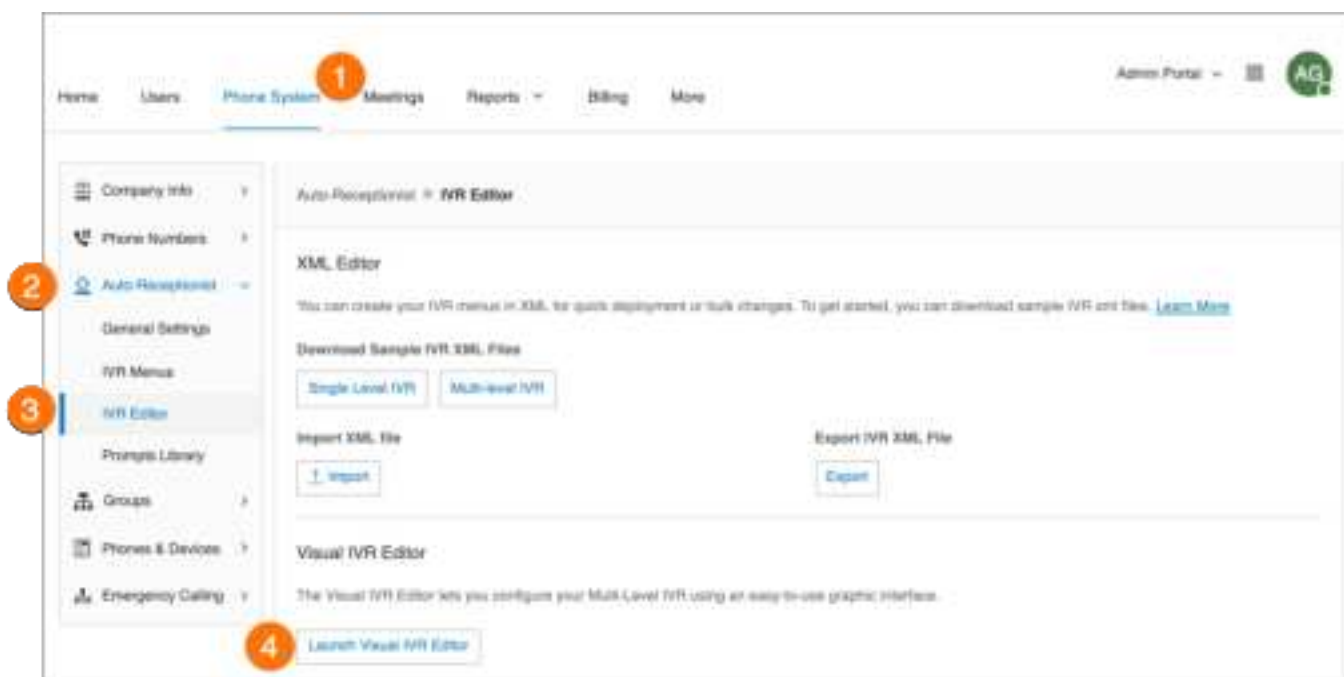
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus**.
4. Click an existing **IVR Menu**.
5. Click **Add** under **Direct Number**.
6. Select a **Location** and follow these instructions for the **Number Type** you choose:
 - a. **Local Number**: 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.



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:

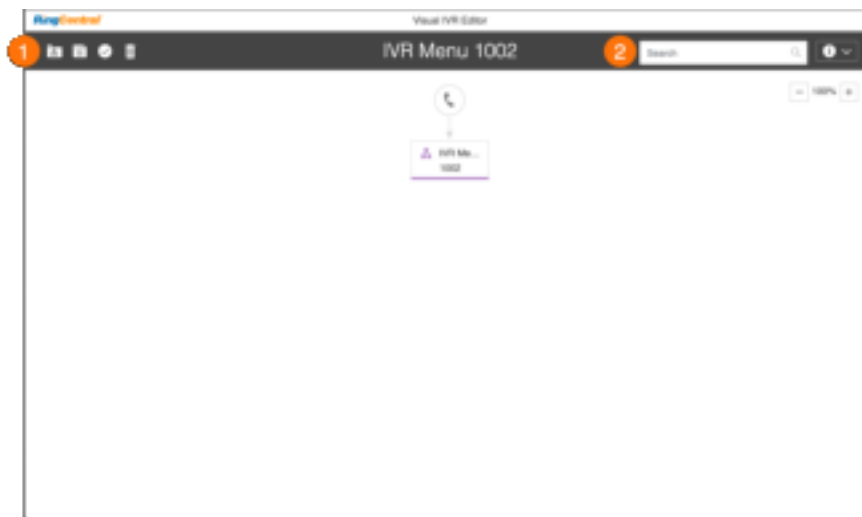
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**.
4. Click **Launch Visual IVR Editor**. The Visual IVR Editor opens in a new browser tab.



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 Menu 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.

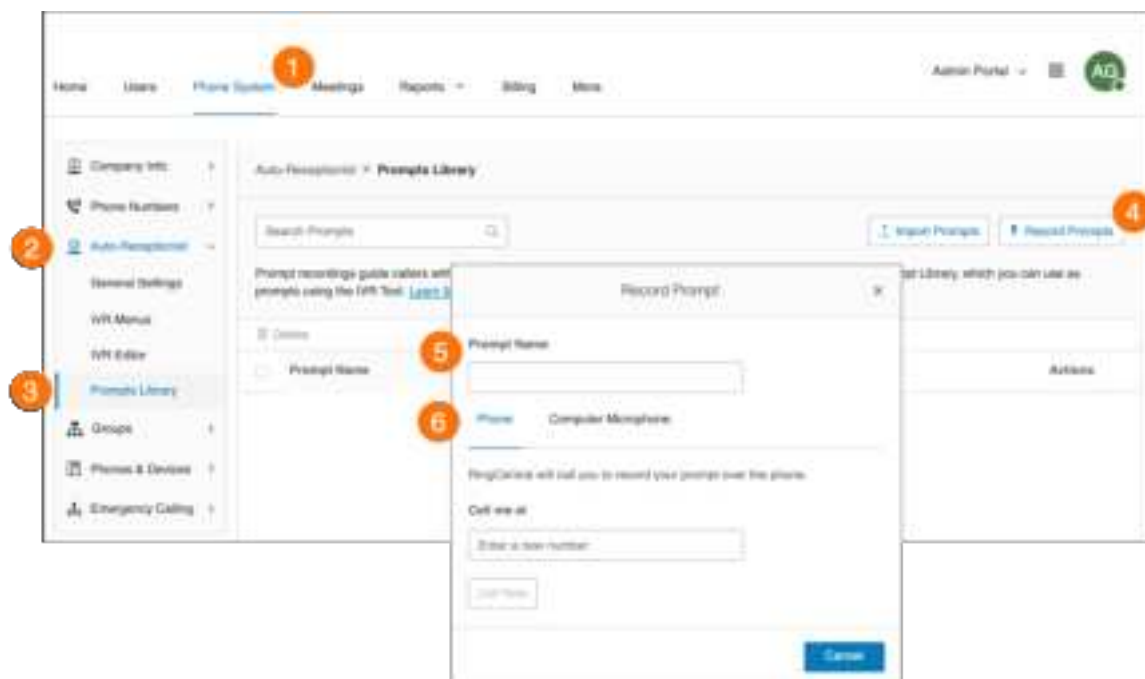
There are two prompt modes: audio and text-to-speech.

- 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

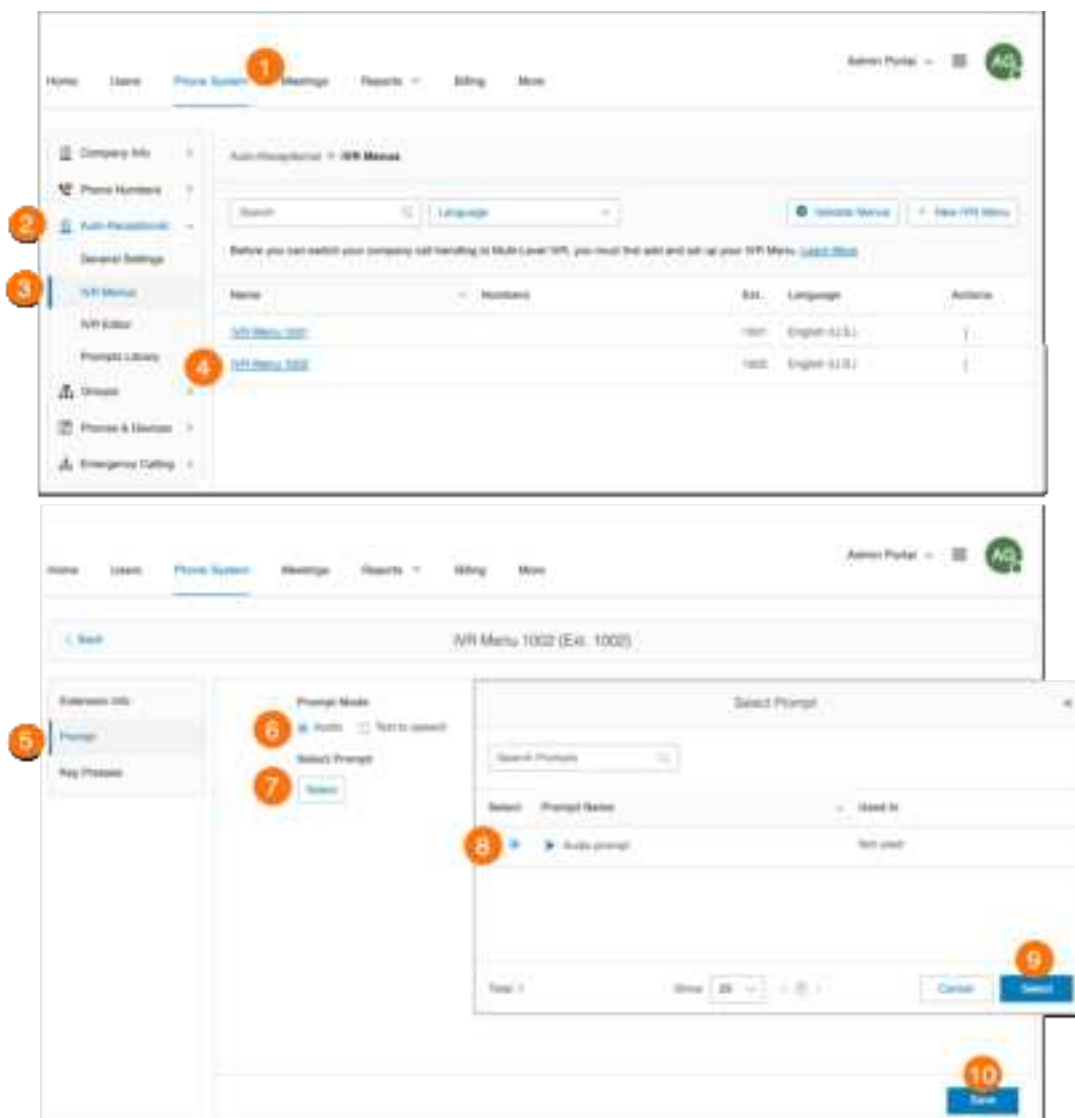
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**. The **Record Prompt** window will appear.
5. Enter a name for your prompt in the **Prompt Name** field.
6. Select one of these prompt methods and follow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

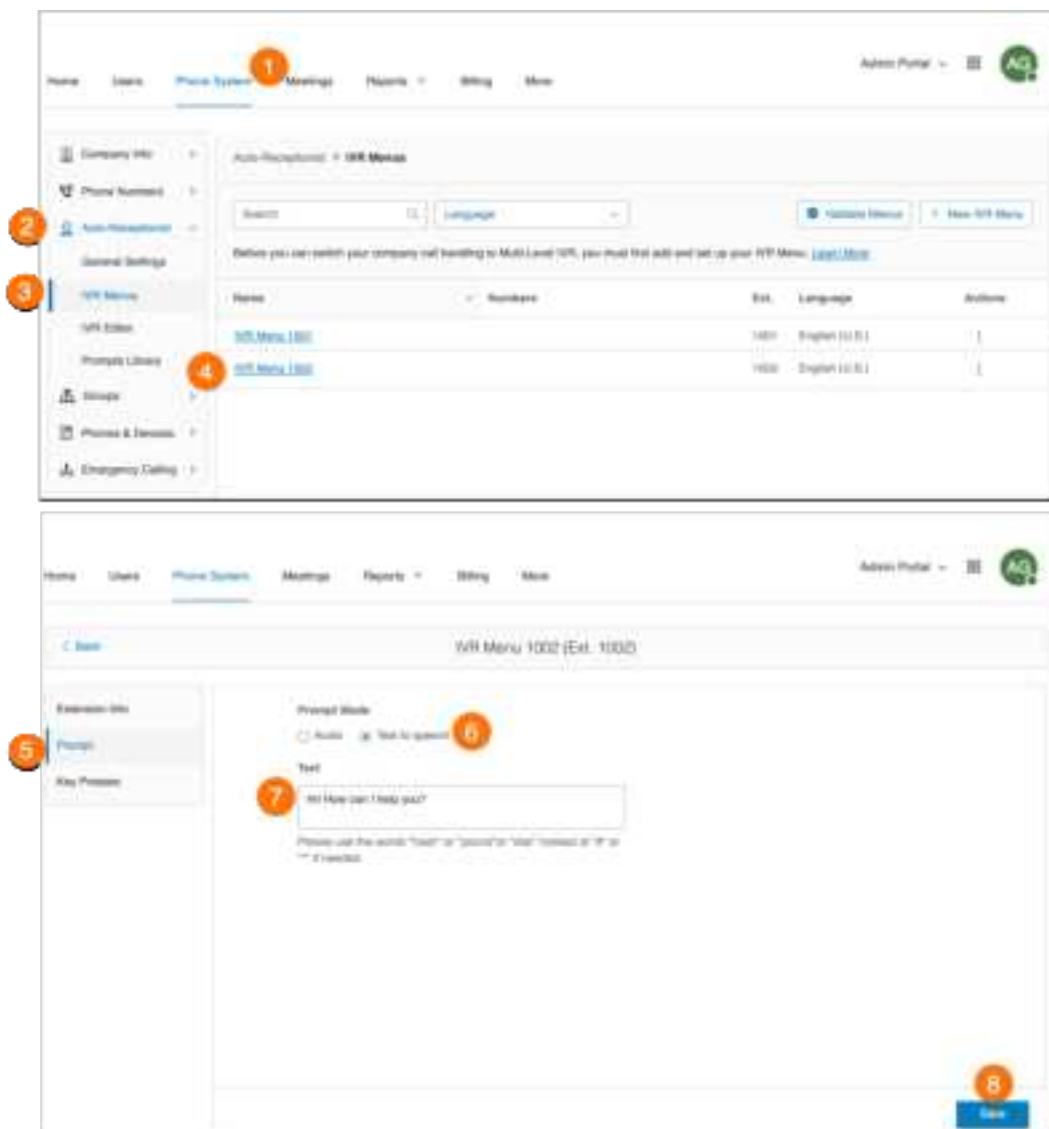


Selecting text-to-speech prompt mode

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

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

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



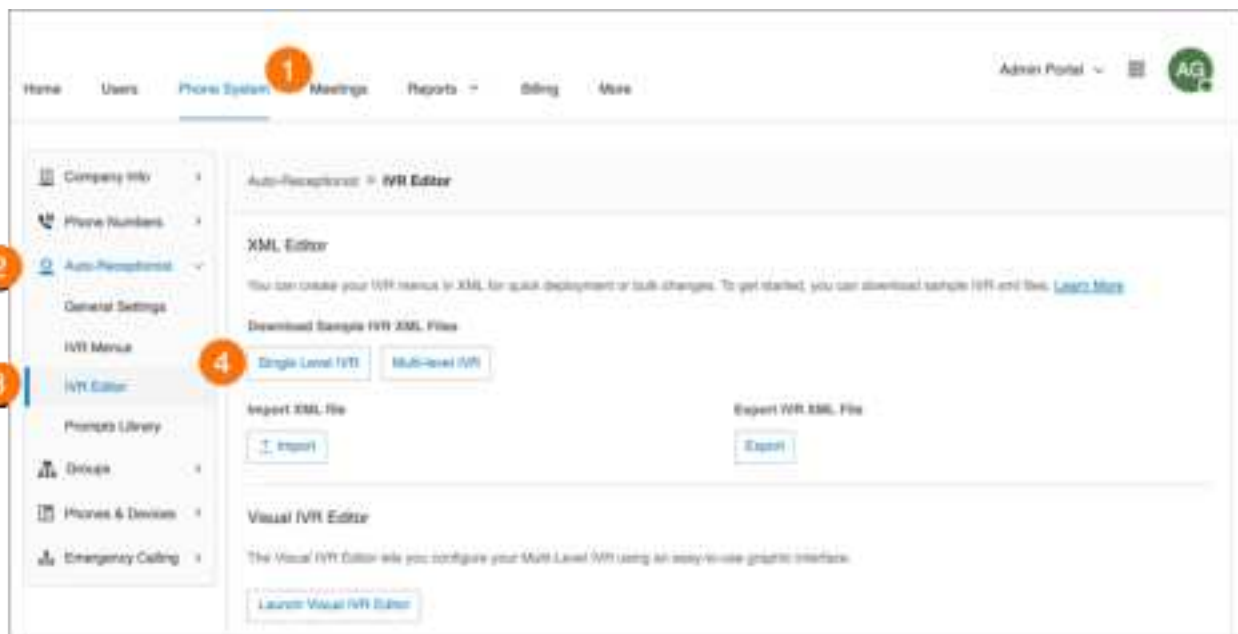
Importing or exporting XML files

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

Downloading a sample XML file

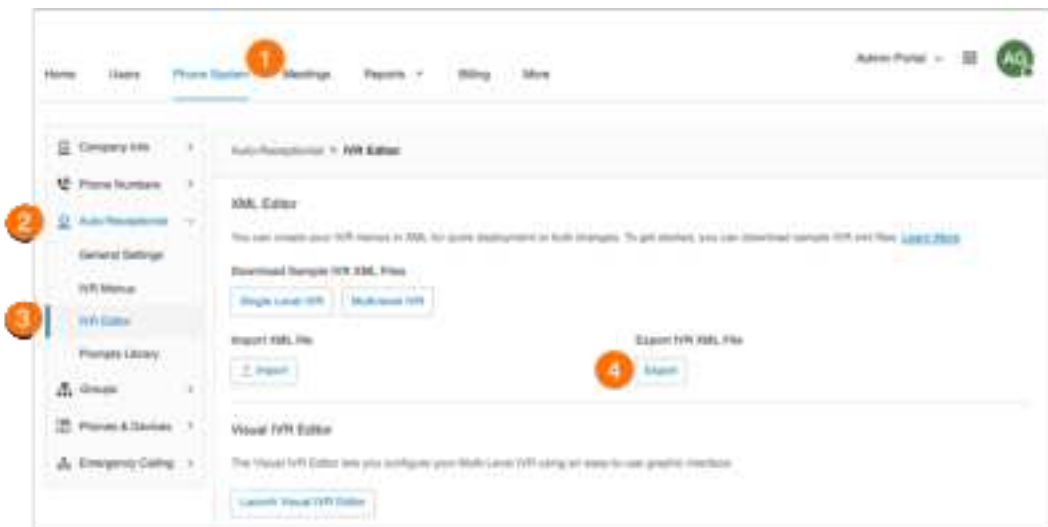
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**. The XML Editor displays.
4. Under **Download Sample IVR XML Files**,
 - Click **Single Level IVR**.
OR
 - Click **Multi-level IVR**.

The sample XML file is downloaded to your browser.



Exporting an XML file

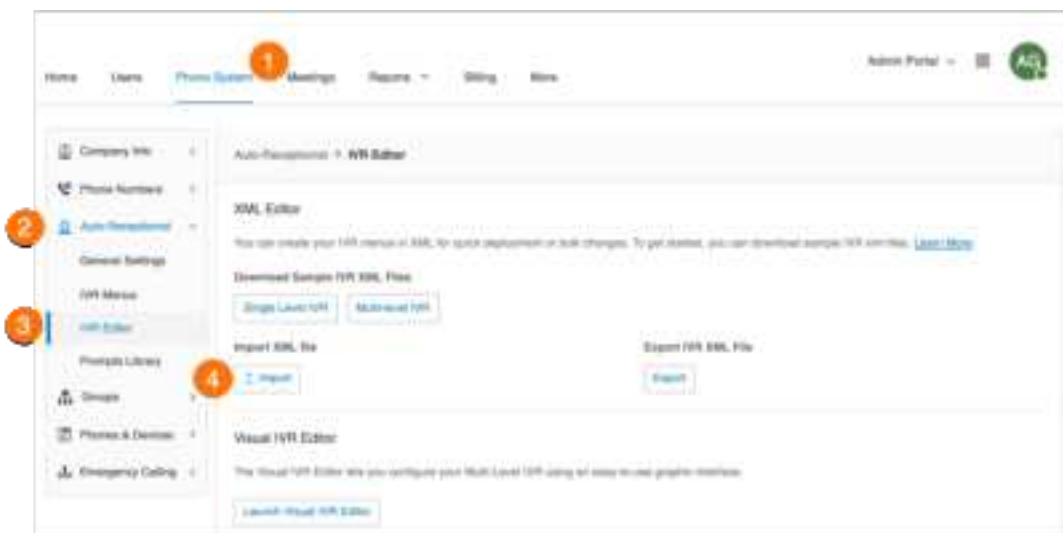
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **IVR Editor**. The **XML Editor** displays.
4. Under **Export IVR XML File**, click **Export**. The sample XML file is exported to your browser.



Importing an XML file

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

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



Recording greetings and messages

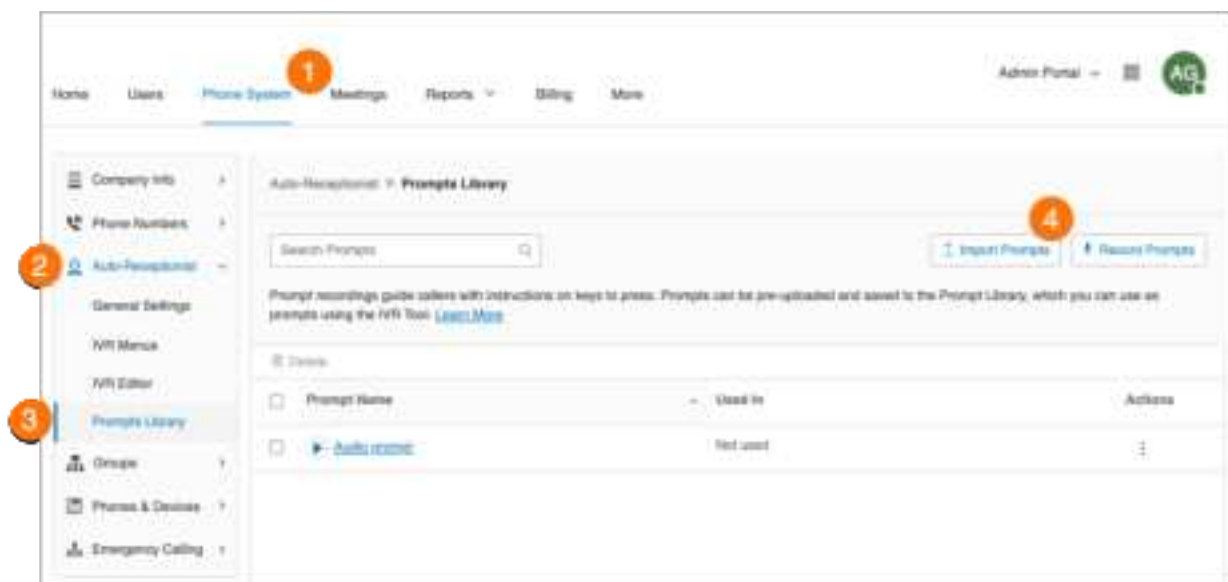
Several tasks require admins to record messages or greetings for your RingCentral system. These steps explain how to do the following:

- 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:

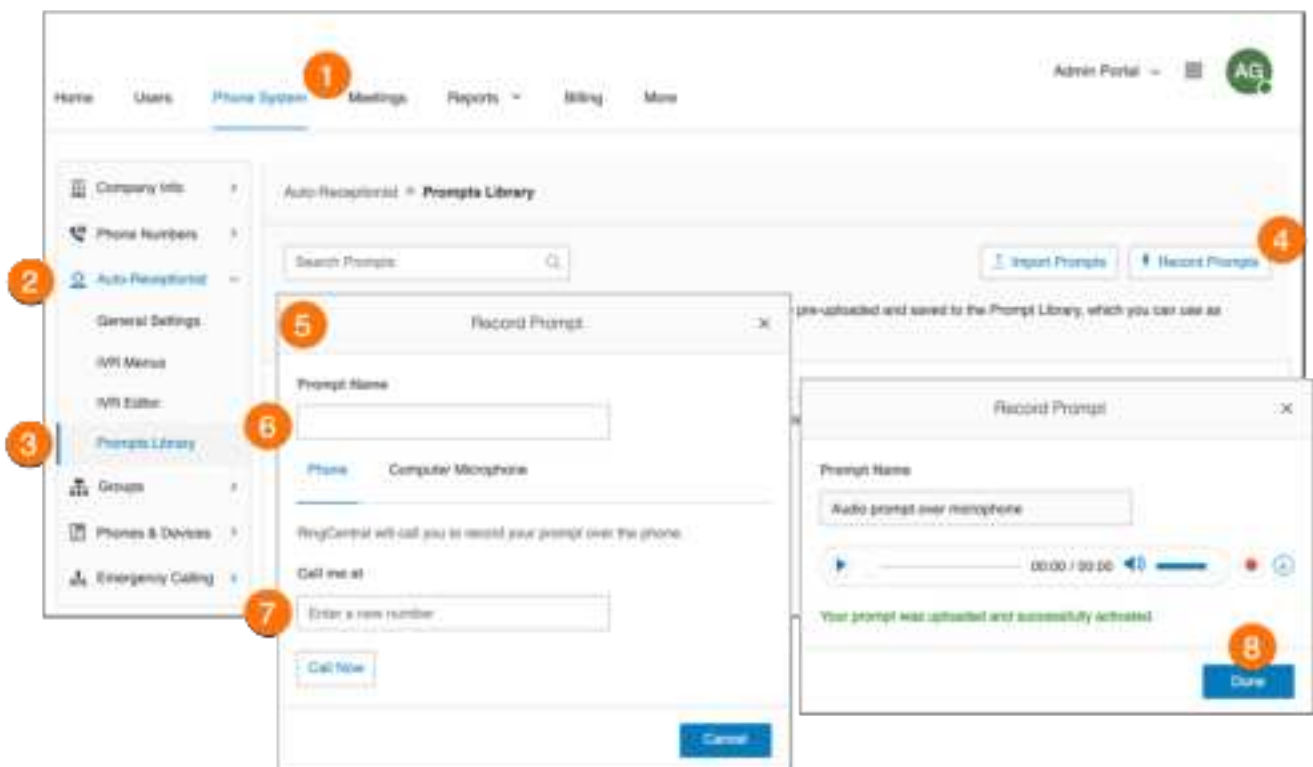
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click the **Import Prompts** button.
5. Navigate to the prompt file location.
6. Select the file and click **Open**.



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.

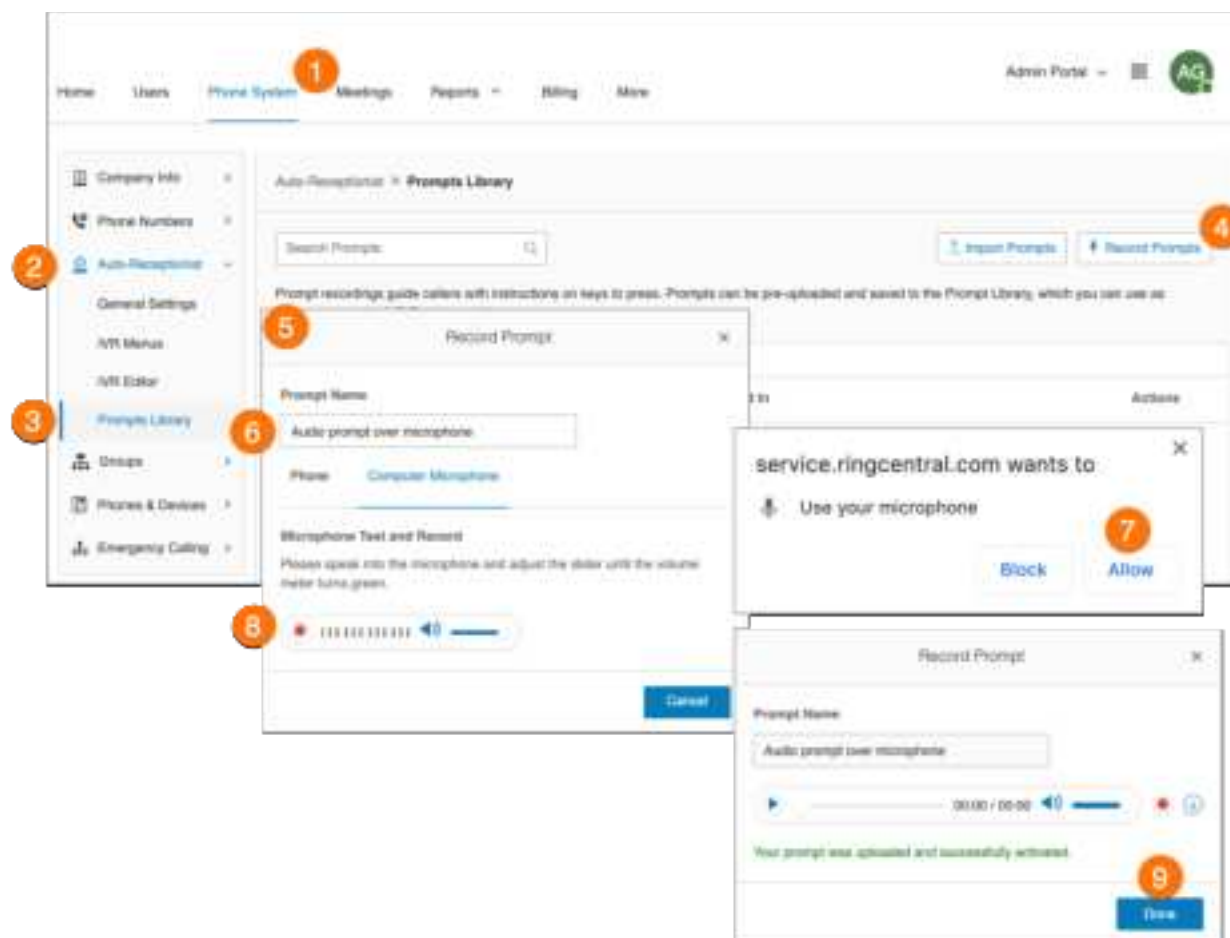
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. The **Record Prompt** window appears.
6. Enter a name in the text field next to **Prompt Name**.
7. Click **Phone**.
 - In the **Call me at** field,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

RingCentral Admin Portal

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

Company Info
Company Address
Call Center Name
Directory Assistance
Phone Numbers
Auto-Receptionist
General Settings
IVR Menu
IVR Editor
Prompt Library
Groups
Phones & Devices
Emergency Calling

Auto-Receptionist > General Settings

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

Company Hours
24 hours

IVR Settings

Company 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: Disconnected
[Set](#)

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](#)

Custom Answering Rule

Multi-condition advanced call handling rules offer powerful call management capabilities using conditions based on time of day, date ranges, incoming caller ID and called number. Please carefully test the rules 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.

The image displays two sequential screenshots of the 'Custom Answering Rule' configuration interface.

Top Screenshot (Step 1: Name Rule): The window title is 'Custom Answering Rule'. The progress bar shows '1 Name Rule' as the active step, followed by '2 Define Conditions' and '3 Define Call Handling'. The instruction reads 'Enter a descriptive name for the rule.' Below this, the label 'Your Rule Name' is followed by a text input field containing 'My Rule 1'. A blue 'Next' button is visible at the bottom right.

Bottom Screenshot (Step 2: Define Conditions): The window title is 'Custom Answering Rule'. The progress bar shows '1 Name Rule' as completed (marked with a checkmark) and '2 Define Conditions' as the active step. Three conditions are listed, each with an unchecked checkbox and a dropdown menu set to 'None':

- ☐ Caller ID
- ☐ Called Number
- ☐ Date and/or Time

A 'Back' button and a 'Next' button are located at the bottom right.

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**.

The image displays two sequential screenshots of the 'Custom Answering Rule' configuration window, highlighting the steps to set a condition and a call handling action.

Top Screenshot (Step 2: Define Conditions):

- 1** The 'Caller ID' checkbox is selected.
- 2** A text input field is available for 'Type Phone Number or Contact Name'. A 'Add' button is next to it.
- 3** The 'Done' and 'Next' buttons are at the bottom right.

Bottom Screenshot (Step 3: Define Call Handling):

- 4** The 'Company Greeting' radio button is selected under 'Incoming calls will be routed to:'.
- 5** The 'Play company greeting' section shows a duration of '00:00 - 00:00' and a volume icon.
- 5** The 'Done' and 'Save' buttons are at the bottom right.

Custom rule condition - Called Number

Called Number applies the rule to the phone number dialed.

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

The image consists of three screenshots from the RingCentral Admin Guide, illustrating the steps to configure a custom answering rule.

Screenshot 1: Custom Answering Rule - Define Conditions
 This screenshot shows the 'Define Conditions' tab of a 'Custom Answering Rule'. It includes fields for 'Caller ID' (Name), 'Caller Number' (with a note: 'Caller Number rules are based on the phone number the caller dialed, for example, a phone number you are using for a customer service message'), 'When Selected Number(s) is Called' (with a 'Select Number' button), and 'Date and/or Time' (with a checkbox). Orange callout numbers 1 and 2 point to the 'Caller Number' and 'Date and/or Time' sections respectively. 'Next' and 'Cancel' buttons are at the bottom right.

Screenshot 2: Select Number
 This screenshot shows the 'Select Number' dialog. It has a search bar and a table with columns 'Phone Number', 'Name', and 'System'. Two numbers are listed: '1234 555-1234' (Name: Auto Receptionist) and '5678 222-4444' (Name: Main Number). At the bottom, there are 'Cancel' and 'Next' buttons. An orange callout number 3 points to the 'Next' button.

Screenshot 3: Custom Answering Rule - Define Call Handling
 This screenshot shows the 'Define Call Handling' tab. It includes a section 'Incoming calls will be routed to:' with radio buttons for 'Company Greeting', 'Voice Extension', 'Call Queue Group', 'Shared Line', 'Forward', and 'Announcement'. To the right, there are fields for 'Play company greeting' (with a volume slider) and 'Transfer when no queue' (with a 'Set' button). Orange callout numbers 1 and 2 point to the 'Company Greeting' and 'Transfer when no queue' sections respectively. 'Next' and 'Cancel' buttons are at the bottom right.

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 in RingCentral MVP.

Top Screenshot: Define Conditions Tab

- Caller ID:** Text field with placeholder 'None'.
- Called Number:** Text field with placeholder 'None'.
- Date and Time:** Section with a description: 'Date and Time rules apply based on a time within the day, across every week, or on a specific date range.' Below this is a section 'Select When This Rule Should be Active:' with two options: 'Weekly Schedule' (selected) and 'Specific Date Range'.
- Weekly Schedule:** A table with columns for Day, From, To, and Action.

Day	From	To	Action
Monday	12:00 PM	1:00 PM	Answer
Tuesday	12:00 PM	1:00 PM	Answer
Wednesday	12:00 PM	1:00 PM	Answer
Thursday	12:00 PM	1:00 PM	Answer
Friday	12:00 PM	1:00 PM	Answer
Saturday			
Sunday			

- Buttons:** 'Save' and 'Next' buttons at the bottom right.

Bottom Screenshot: Define Call Handling Tab

- Answering calls will be routed to:** A list of options: 'Company Greeting' (selected), 'User Extension', 'Call Queue Group', 'Shared Line', 'Voicemail', and 'Announcement'.
- Company Greeting:** A section with a text field 'My company greeting' and a duration selector '00:00-00:00'.
- Buttons:** 'Save' and 'Next' buttons at the bottom right.

Custom answering rule call handling actions

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

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

Custom answering rule list

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

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

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

Call groups

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

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

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

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

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

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

Call queues

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

Adding a call queue group

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

The screenshots illustrate the process of creating a call queue in the RingCentral Admin Guide. The steps are as follows:

1. Navigate to the **Call Queues** section in the left sidebar.
2. Click on the **Call Queues** link in the sidebar.
3. Click on the **Call Queues** link in the sidebar.
4. Click on the **New Call Queue** button.
5. Enter the **Queue Name** and **Extension Number**.
6. Click on the **Save Call Queue** button.
7. Click on the **Save** button.
8. Click on the **Queue Managers** tab.
9. Click on the **Queue Managers** tab.
10. Click on the **Save** button.

Configuring a call queue

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

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

- Voicemail Greeting
- Message Recipient
- Notification Settings

6. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface for configuring a call queue. 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, Auto-Responder, Groups, Call Queues, Paging Only, Shared Lines, Park Locations, Call Monitoring, Others, Phones & Devices, and Emergency Calling. The main content area is titled 'Groups > Call Queues' and includes a search bar and a 'New Call Queue' button. A table lists existing call queues, with 'Call Queue Test' highlighted. A modal window titled 'Call Queue Test (Ext. 1)' is open, showing configuration options for Call Queue Details, Direct Numbers, Greeting & Hold Music, Call Handling & Members, and Messages & Notifications. The 'Messages & Notifications' section is expanded, showing settings for Voicemail Greeting (Default, 00:00 / 00:00) and Message Recipient (Ext. 1, This call queue). The modal includes 'Exit', 'Cancel', and 'Save' buttons.

1. Phone System

2. Groups

3. Call Queues

4. Call Queue Test

5. Call Queue Test (Ext. 1)

6. Save

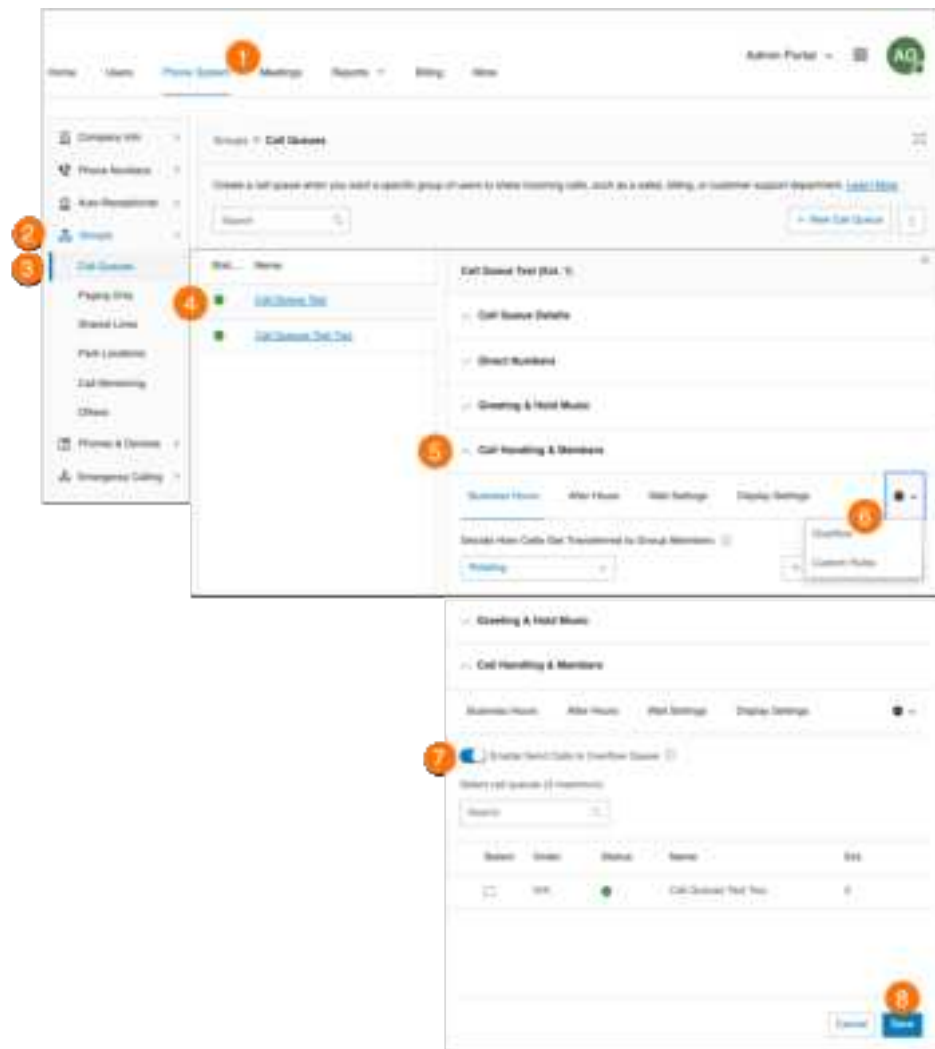
Configuring call queue-to-queue overflow

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

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

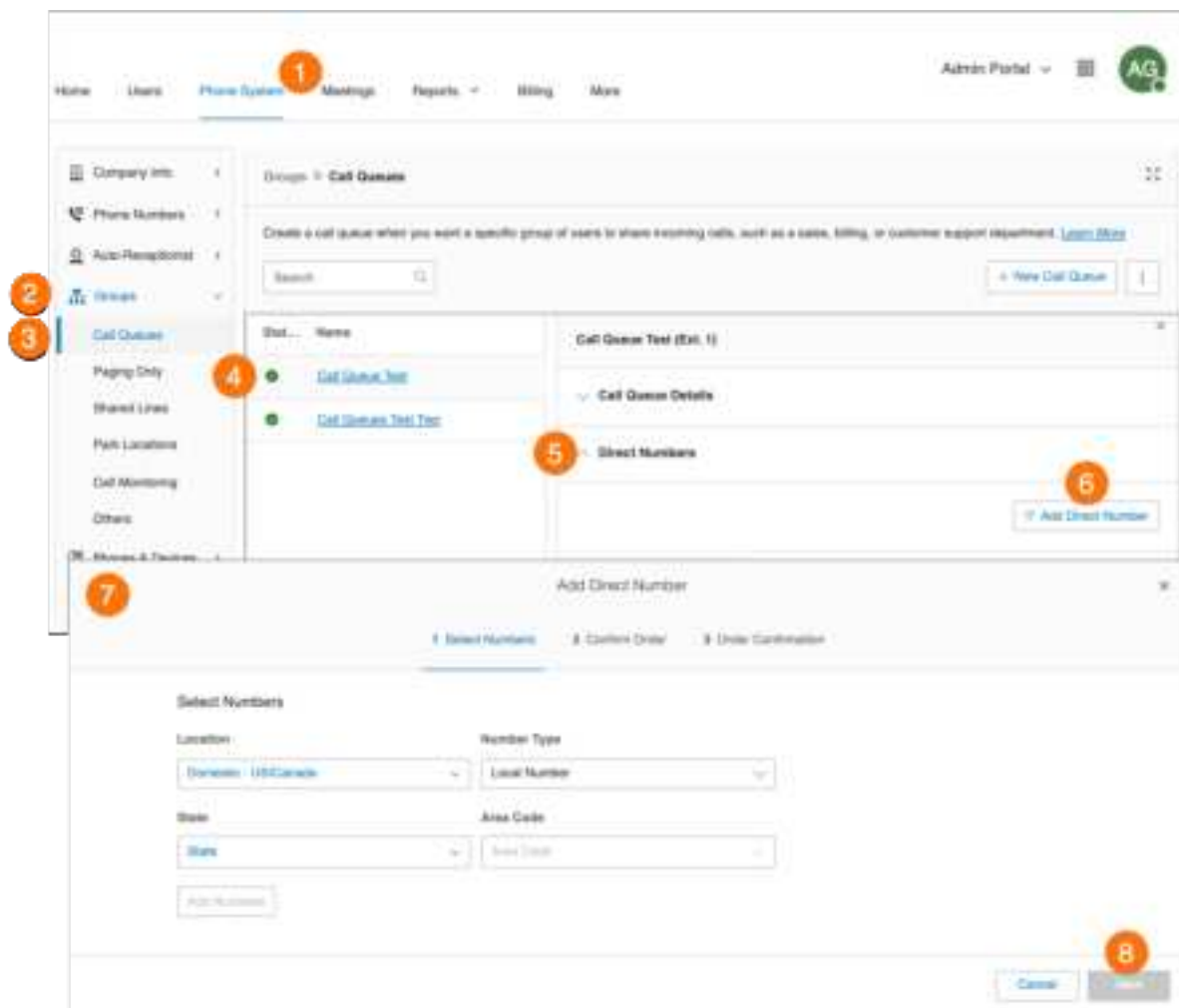
The **Overflow Call Queues** section lets you enable, create, and manage your overflow queues.

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



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.



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 Apps

Admin Portal AG

Company Info Phone Numbers Auto-Responder Groups **Call Queues** Paging Only Shared Lines Pure 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

Status	Name
●	Call Queue Test
●	Call Queue Test Test

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

Pooling

+ Add Call Queue Member

Name	Ext.	Actions
Mark Hill	101	

Cancel Save

Messages and notifications

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

Setting a voicemail greeting

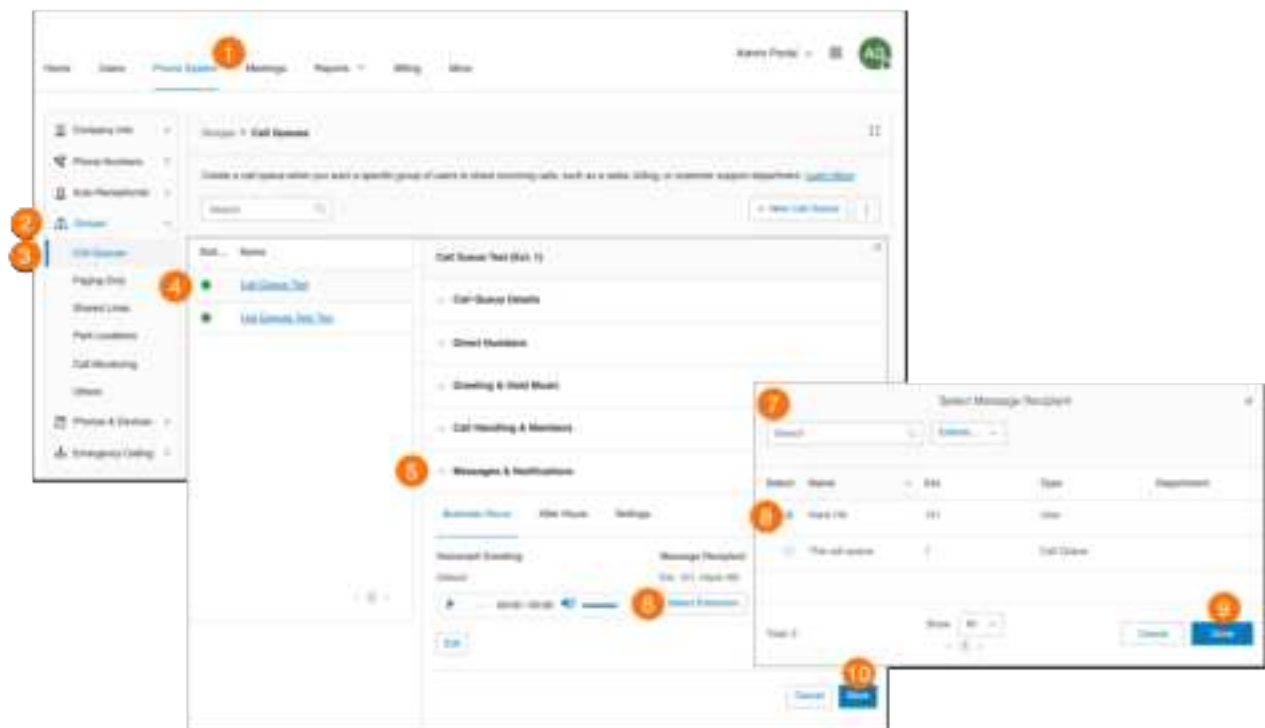
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select a **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Edit** under **Voicemail Greeting**.
7. A window will appear displaying the current **Voicemail Greeting**. Choose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

The screenshot displays the RingCentral Admin Portal interface for configuring Call Queues. 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, Auto-Management, Groups, Call Queues, Paging Only, Shared Lines, Part Locations, Call Monitoring, and Others. The main content area is titled 'Groups > Call Queues' and includes a description, a search bar, and a 'New Call Queue' button. A table lists existing call queues, with one highlighted. A 'Call Queue Test (Edit, H)' panel is visible on the right. A 'Welcome! Greeting' modal window is open, showing options for 'Set Greeting' (Custom), 'Phone', 'Computer/Monophone', and 'Importing', along with a 'Call me at' section. Numbered callouts (1-9) highlight specific UI elements: 1 points to the 'Phone System' tab; 2 points to the 'Groups' menu item; 3 points to the 'Call Queues' menu item; 4 points to the 'Call Queues' table; 5 points to the 'Messages & Notifications' section; 6 points to the 'Call Queue Test (Edit, H)' panel; 7 points to the 'Set Greeting' dropdown; 8 points to the 'Create' button; and 9 points to the 'Save' button.

Setting message recipients

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

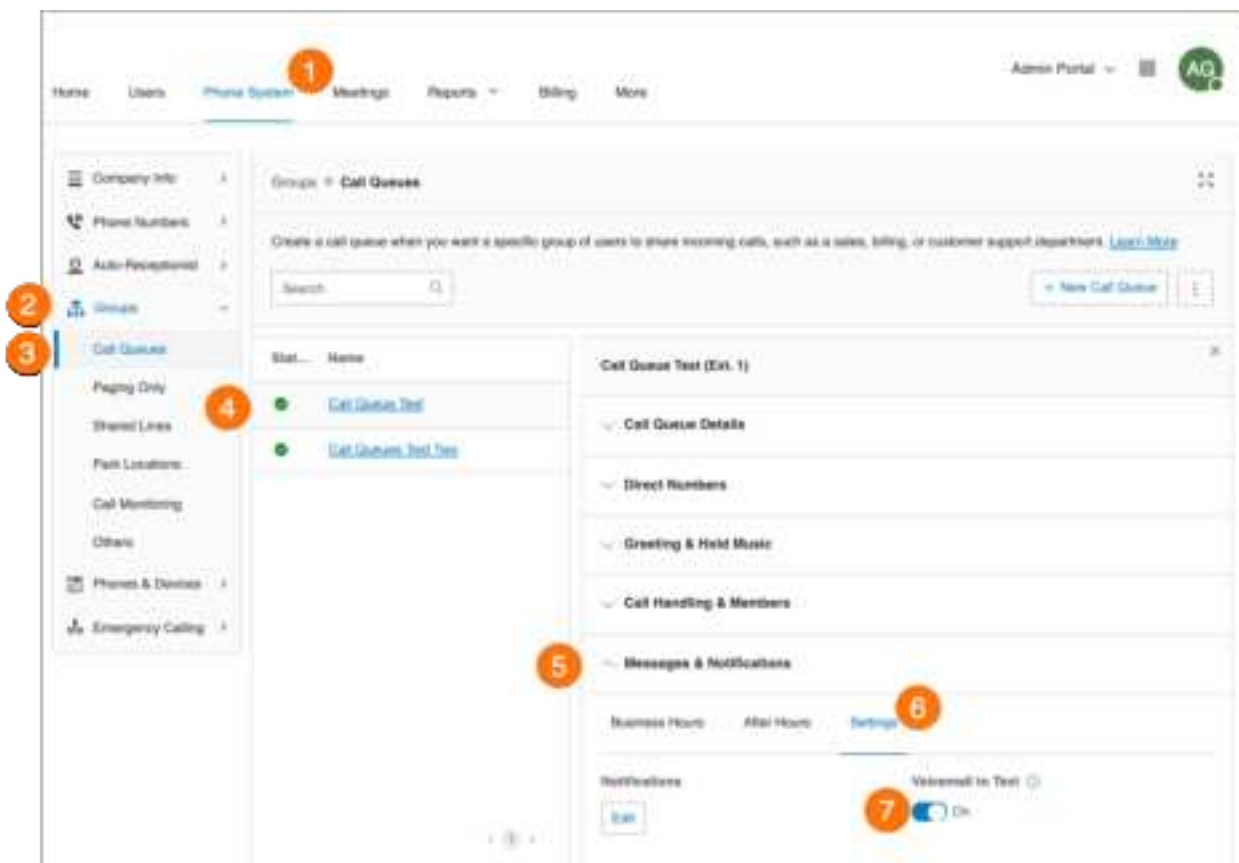
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select a **Call Queue**.
5. Click **Messages & Notifications**.
6. Click **Select Extension** under **Message Recipient**.
7. A window will appear with a list of members to receive messages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



Setting voicemail-to-text transcription

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

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



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-Provisioning **Groups** Call Queues Paging Only Shared Lines Park Locations Call Monitoring Others Phones & Devices Emergency Calling

Groups > **Call Queues**

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

Search [+ New Call Queue](#)

Stat	Name
●	Call Queue Test
●	Call Queue Test Test

Call Queue Test (Ext: 1)

Call Queue Details

Direct Numbers

Greeting & Hold Music

Call Handling & Members

Messages & Notifications

Business Hours **Open Hours** **Settings**

Notifications [Volicemail to Text](#) ☐ **On**

[Edit](#)

Notifications

	By Email	By SMS
Volicemail 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

Phone FQDN: [protestandprepare188@gmail.com](#)

Email:

Select Carrier: Phone Number: [+ \(US\)](#)

[My carrier is not listed](#)

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

Paging only groups

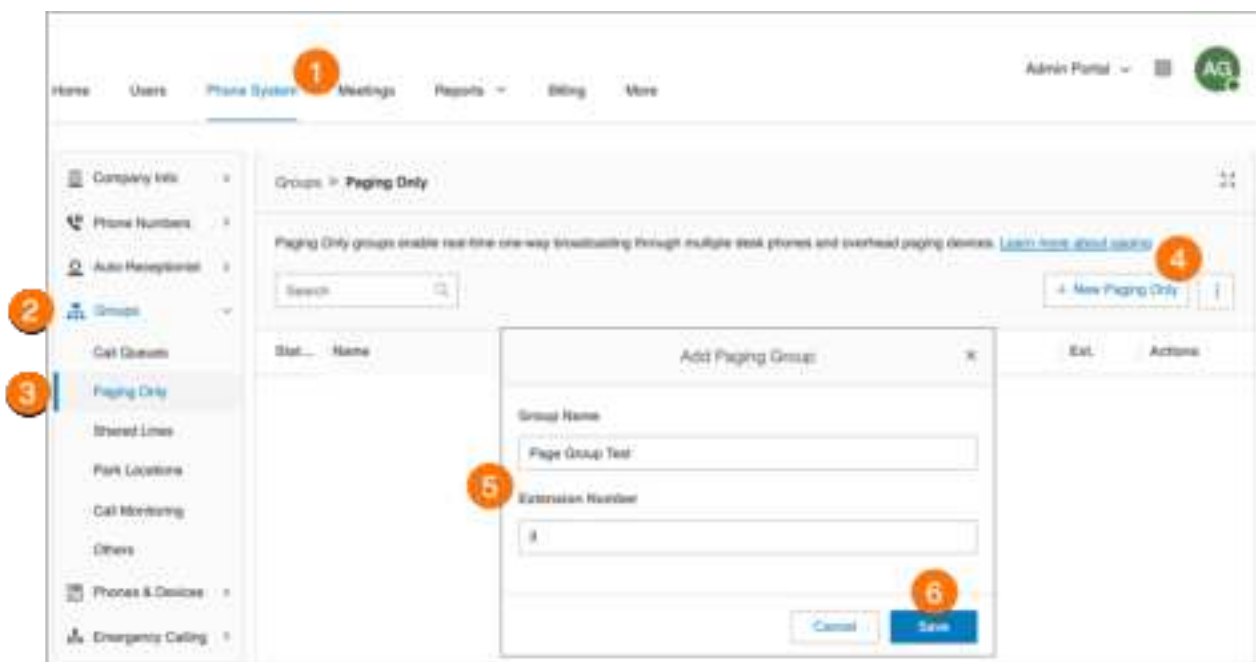
Paging Only groups enable real-time one-way broadcasting through multiple desk phones and overhead paging devices. Paging Only groups are great for a variety of locations such as warehouse/shipping centers, retail stores, schools, and hospitals, among others.

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**.

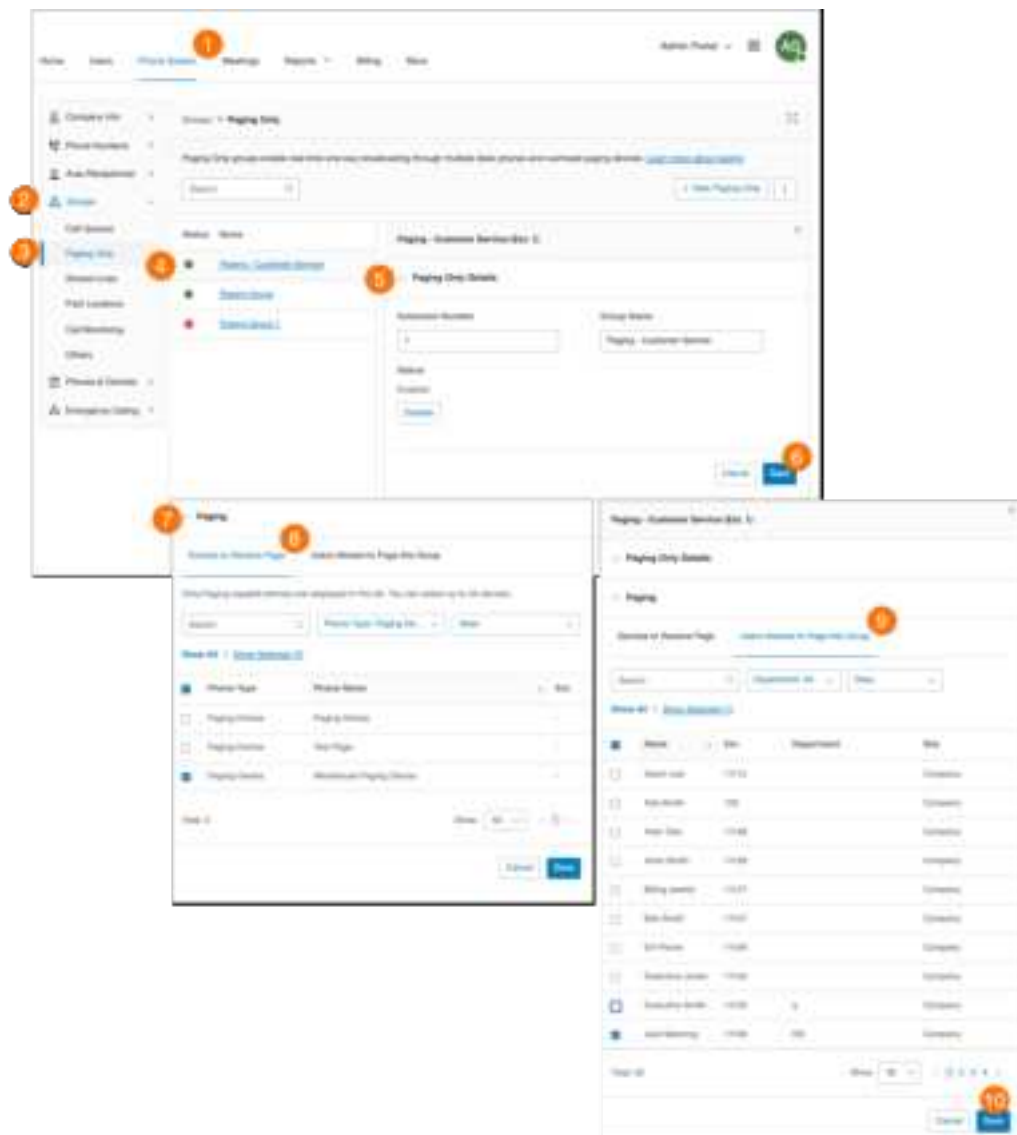
Note: This feature is available for accounts with two or more users.



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**.

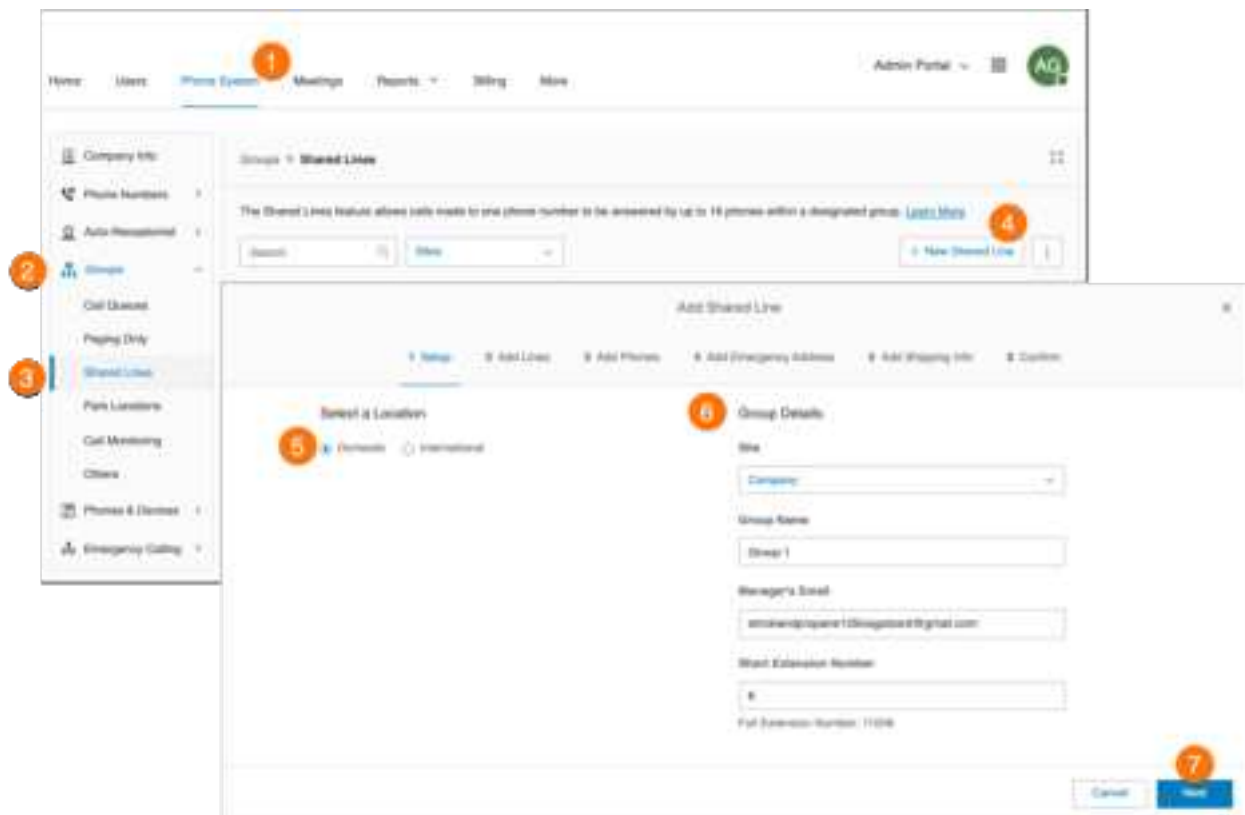


Shared line groups

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

Adding a shared line group

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



Configuring a shared line group

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

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

Adding a direct number

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

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

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

Setting a greeting

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

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

Managing blocked calls

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

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

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

Setting custom music on hold

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

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

To set up custom Music on hold:

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

Managing call handling

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

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

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

Managing outbound caller ID

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

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

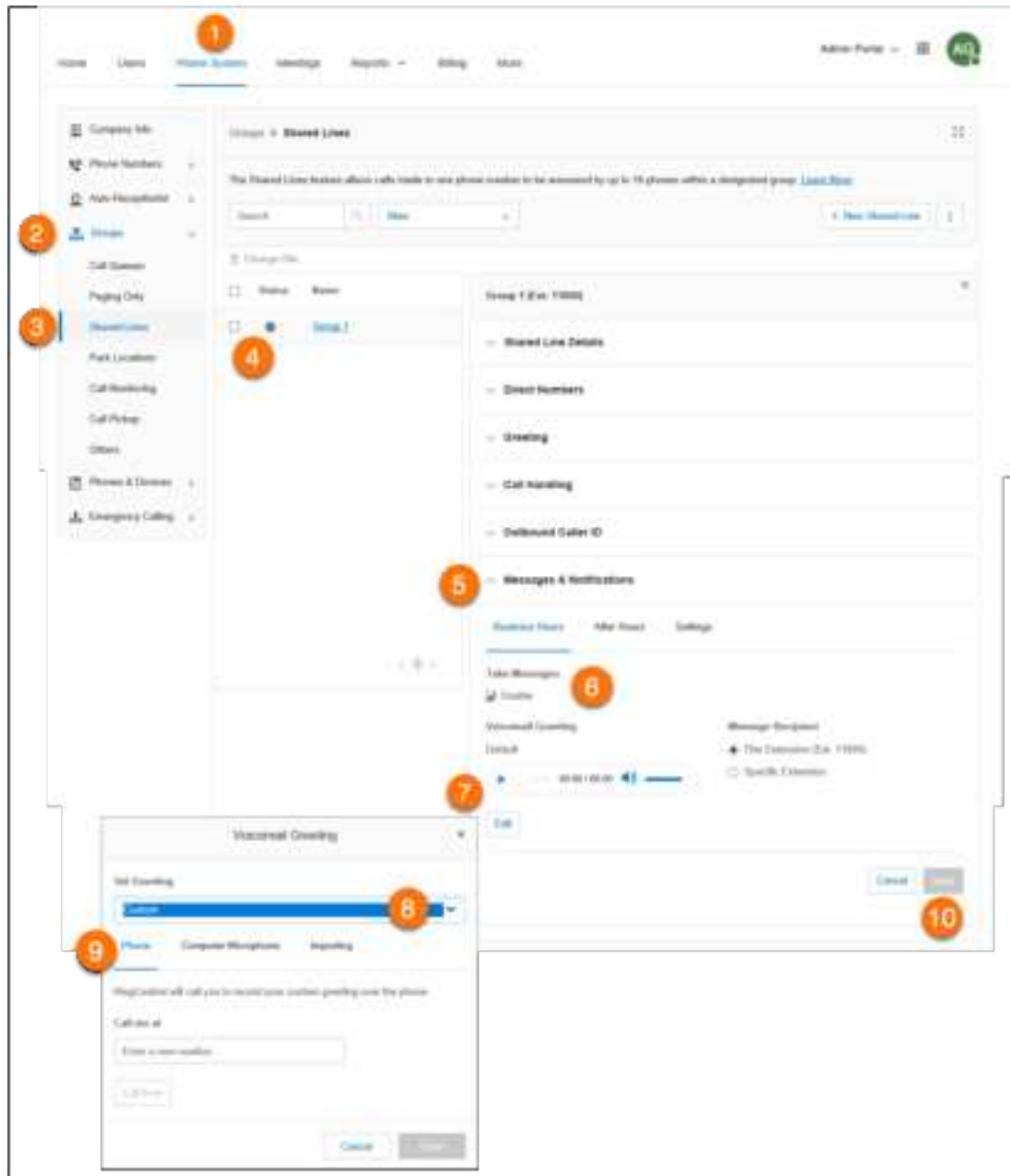
Messages and notifications

Set up a group voicemail and notification options.

Setting up voicemail greeting

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

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



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**.

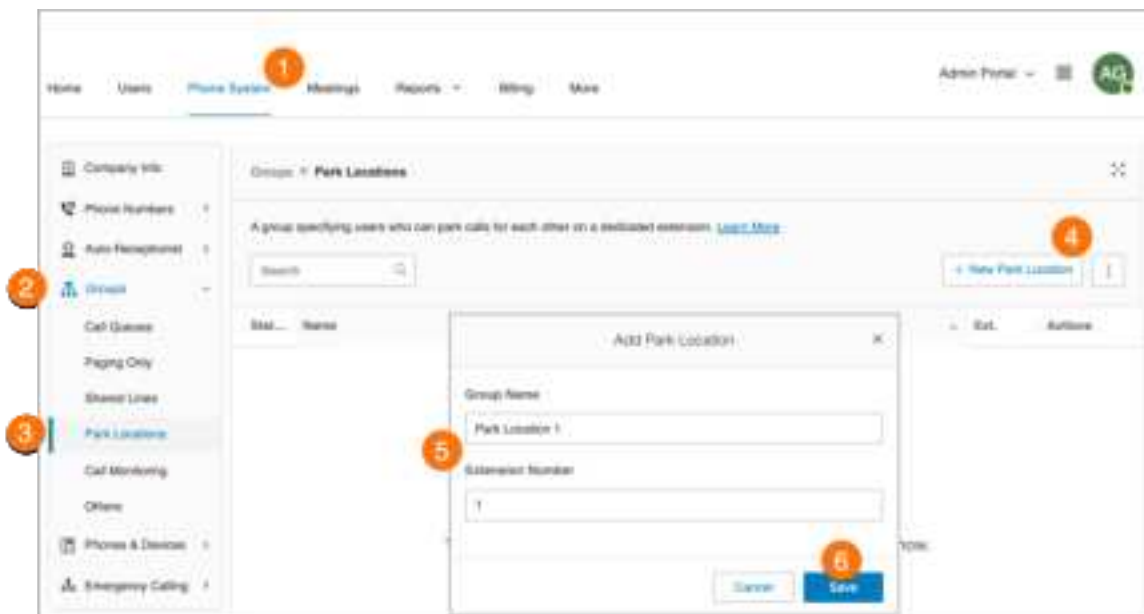
Park location groups

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 Location** window will appear.
5. Enter the **Group Name** and **Extension Number**.
6. Click **Save**.

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

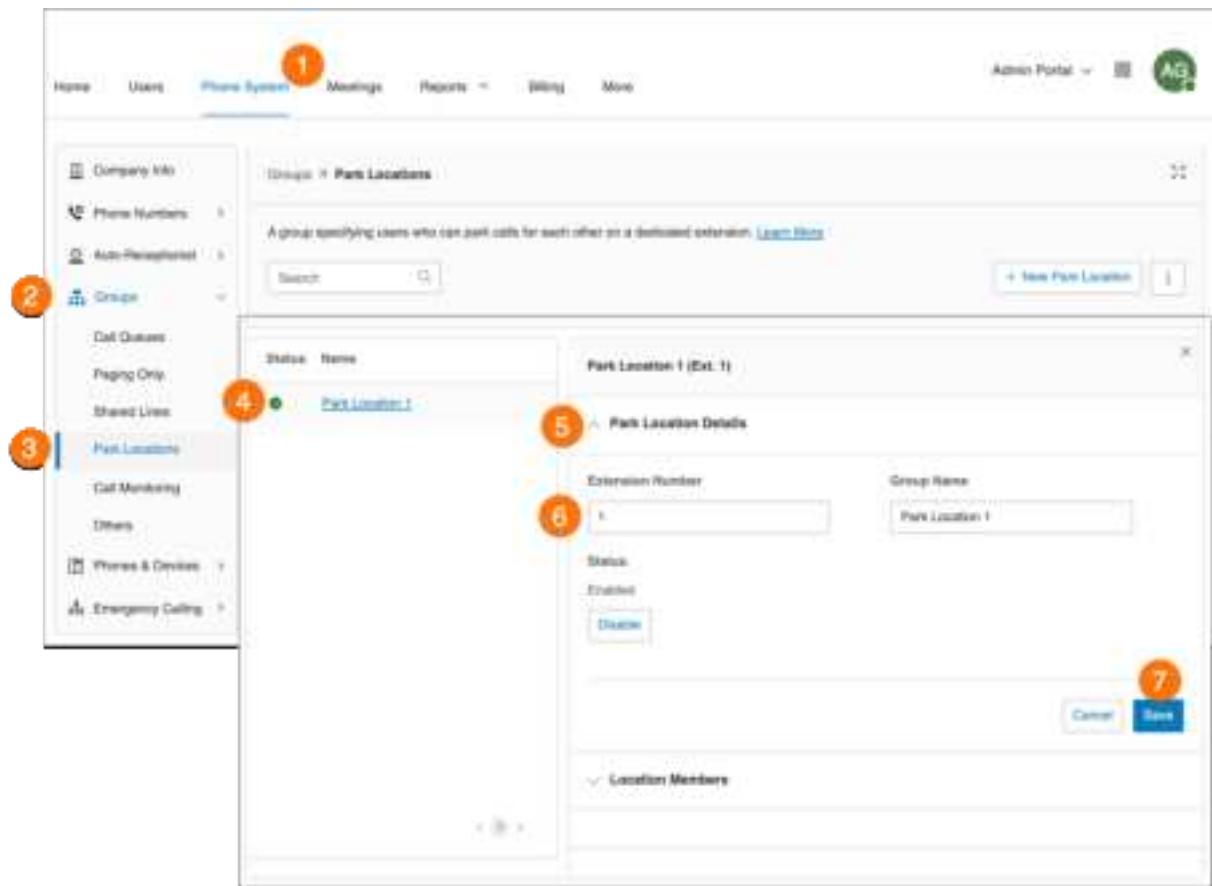


Configuring a park location

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

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

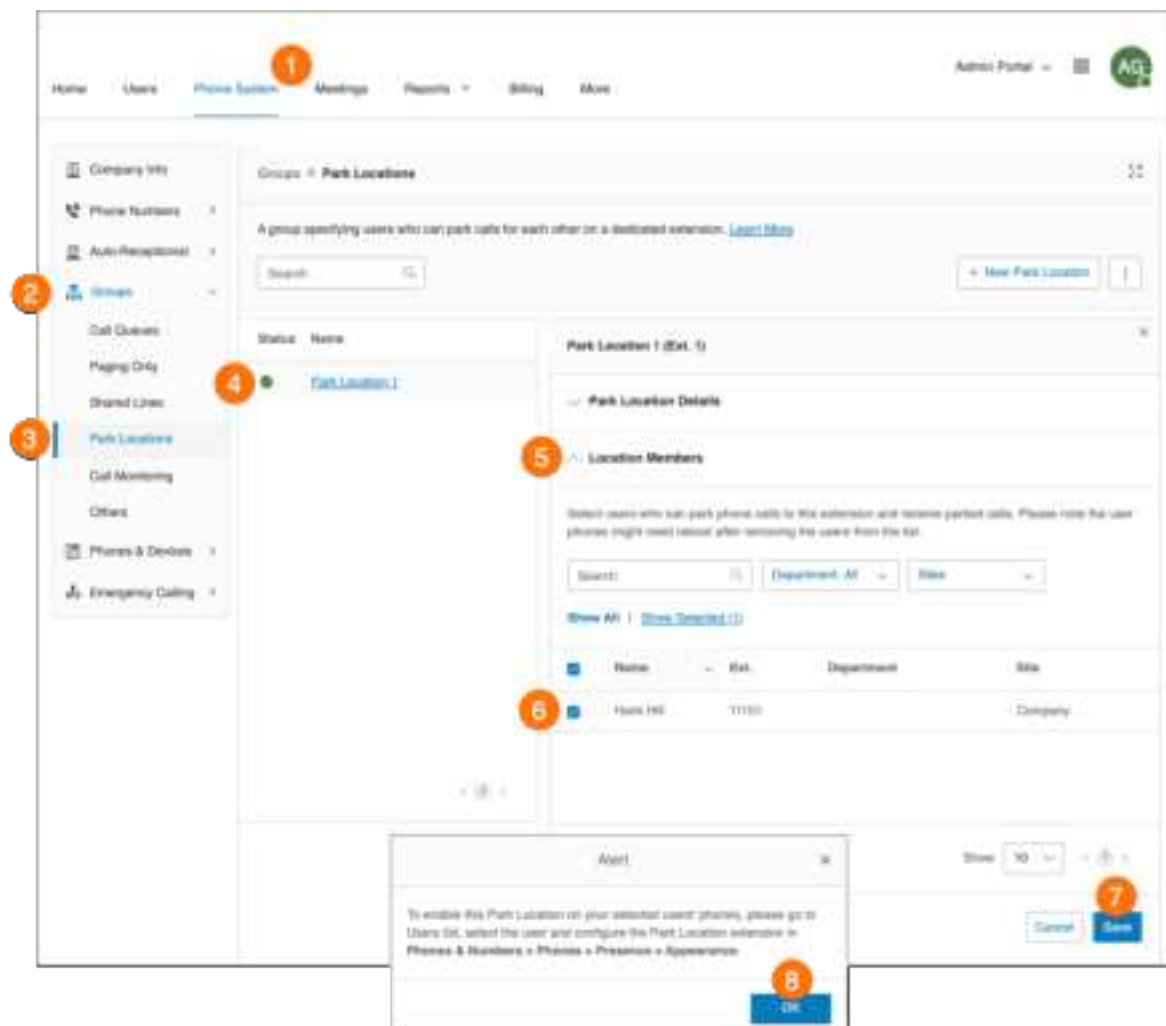
1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Park Locations**.
4. Select an existing **Park Location**.
5. Click **Park Location Details**.
6. Edit the **Extension Number** and **Park Location**.
7. Click **Save**.



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.



Setting up presence appearance

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

Call monitoring groups

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

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

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

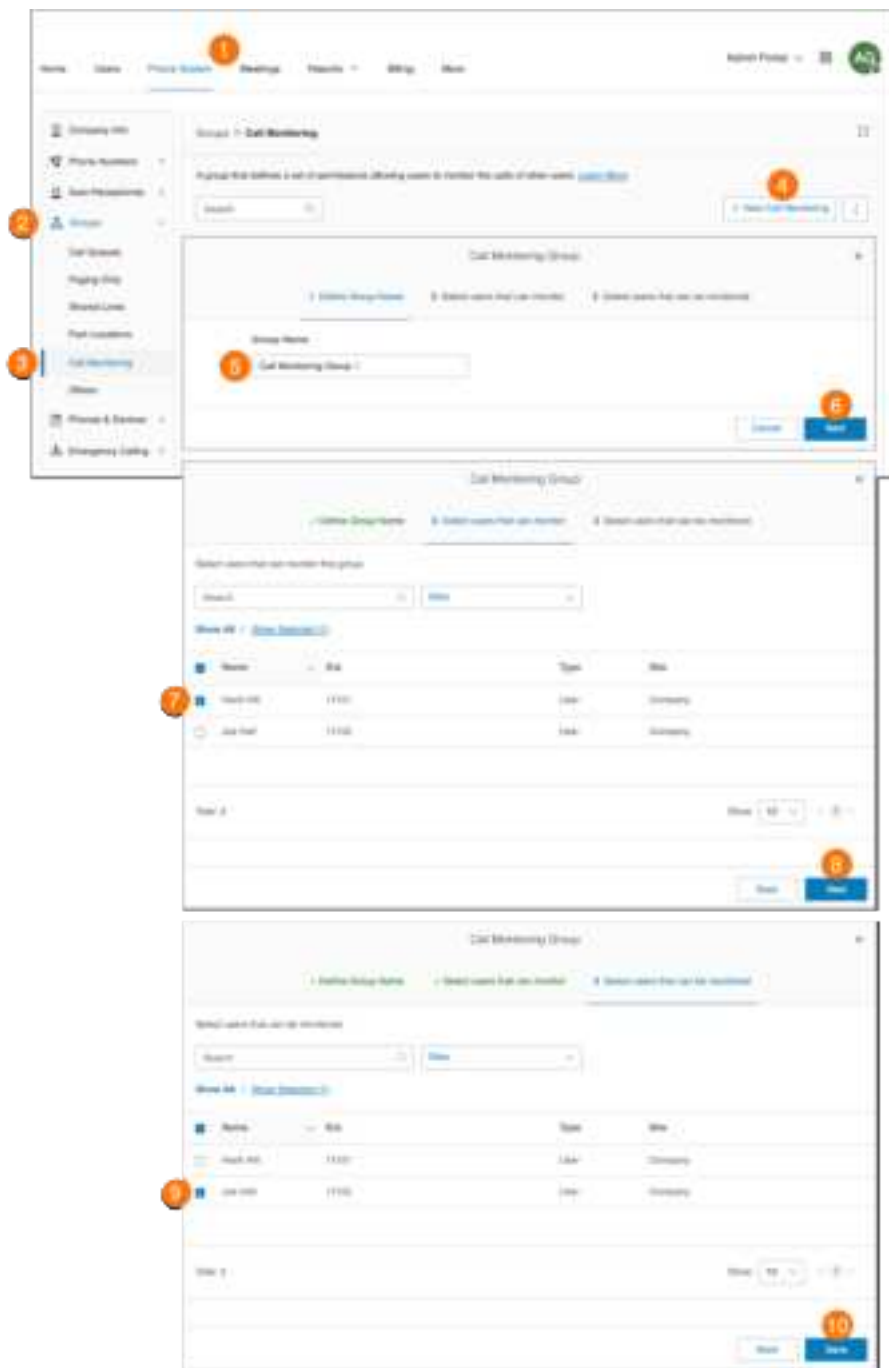
You must have a supported device with presence capabilities to use this feature. The following devices are supported:

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

Adding and configuring a call monitoring group

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

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



The screenshots illustrate the steps to configure call monitoring in RingCentral:

1. Navigate to the **Call Monitoring** section in the left sidebar.
2. Click on **Call Monitoring** in the left sidebar.
3. Click on **Call Monitoring Group** in the left sidebar.
4. Click on **Call Monitoring Group** in the top right corner.
5. Click on **Call Monitoring Group** in the top right corner.
6. Click on **Call Monitoring Group** in the top right corner.
7. Click on **Call Monitoring Group** in the top right corner.
8. Click on **Call Monitoring Group** in the top right corner.
9. Click on **Call Monitoring Group** in the top right corner.
10. Click on **Call Monitoring Group** in the top right corner.

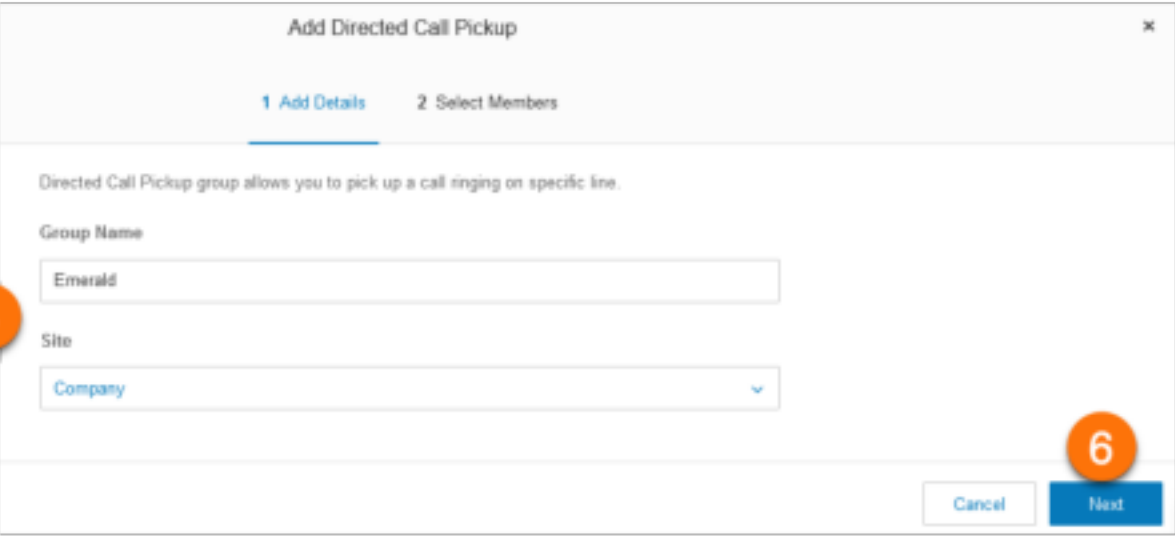
Directed call pickup

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 states: 'Directed Call Pickup group allows you to pick up a call ringing on specific line.' There are two input fields: 'Group Name' with the text 'Emerald' and 'Site' with a dropdown menu showing 'Company'. An orange circle with the number '5' is next to the 'Group Name' field. At the bottom right, there are 'Cancel' and 'Next' buttons. An orange circle with the number '6' is next to 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**.

Full Details 2 Select Numbers

Direct call pickup doesn't require a physical phone key. Calls can be picked up by dialing "9" followed by the ringing extension number.

Show All | Show Selected (3)

<input checked="" type="checkbox"/>	Name	Ext.	Department	Site
<input type="checkbox"/>	Dave Brown	11181	Operations	Company
<input checked="" type="checkbox"/>	David Black	11182		Something New
<input checked="" type="checkbox"/>	Ganesh Rhyler	11183		Company
<input checked="" type="checkbox"/>	Harvey Jellins	11185	Executive	Company

Total: 3

12

7

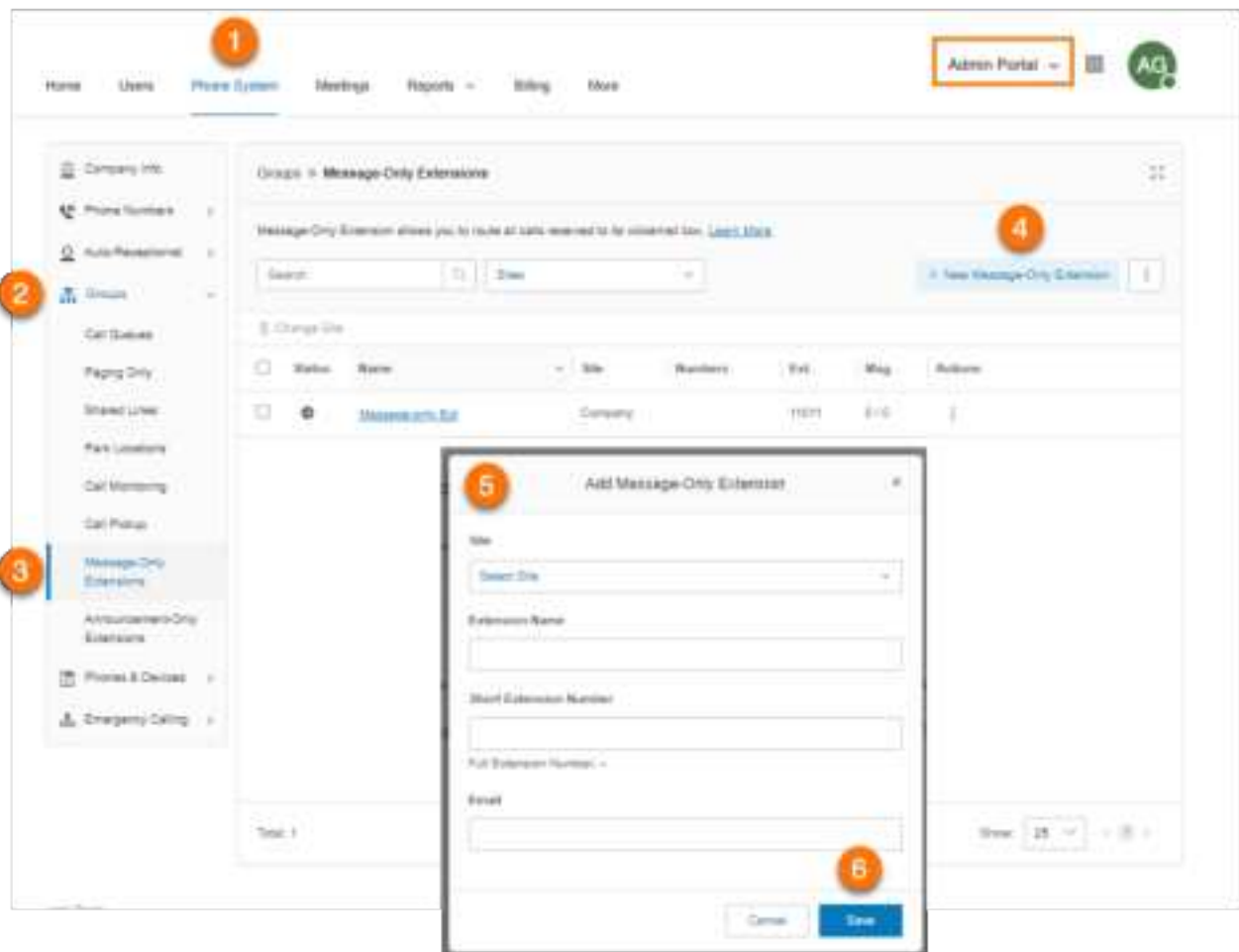
8

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**.



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**

The screenshot displays the RingCentral Admin Portal interface for configuring Message-Only Extensions. The top navigation bar includes links for Home, Users, Phone System, Messages, Reports, Billing, and More. The left sidebar contains a menu with options like Company Info, Phone Numbers, Auto-Forwarding, Groups, Call Queues, Ringing Only, Shared Lines, Park Locations, Call Waiting, Call Pickup, Message-Only Extensions (highlighted with callout 3), Auto-Forwarding Only Extensions, Phones & Devices, and Emergency Calling. The main content area shows the 'Message-Only Extensions' page with a search bar (callout 4) and a list of extensions. The 'Message-Only Extension Details' tab (callout 5) is active, showing fields for Short Extension Number, Full Extension Number, Extension Name, Company Name, Contact Name, Email, and a 'Send Message' button. The 'Settings' tab (callout 7) is also visible, showing fields for Regional Settings, Confirmation Message, and a 'Send Message' button. A 'Save' button (callout 6) is located at the bottom right of the details form.

1. Top navigation bar

2. Left sidebar menu

3. Message-Only Extensions menu item

4. Search bar

5. Message-Only Extension Details tab

6. Save button

7. Settings tab

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**.

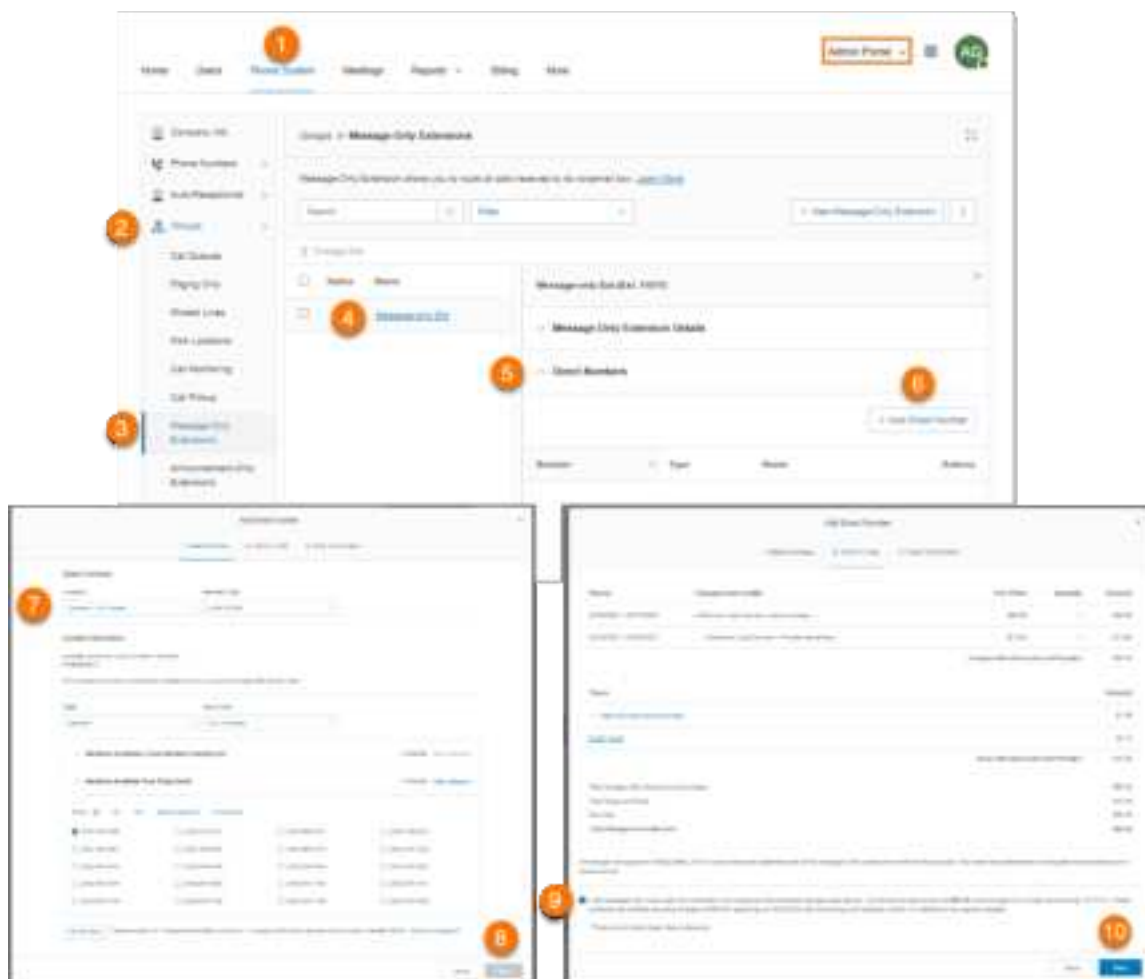
The screenshot displays the RingCentral Admin Portal interface for configuring Message-Only Extensions. The process is guided by numbered callouts 1 through 9.

- 1**: The top navigation bar, with the **Phone System** tab selected.
- 2**: The left-hand sidebar menu, where **Message-Only Extensions** is highlighted.
- 3**: The **Message-Only Extensions** section in the sidebar.
- 4**: A table listing existing extensions, with **Message-only Ext** selected.
- 5**: The **Message-Only Extension Details** configuration page.
- 6**: The **Record Extension Name** field in the details page.
- 7**: A dropdown menu for recording the extension name, showing the selected option **RingCentral text-to-speech**.
- 8**: The **Record Extension Name** field in the details page, now populated with **Message-only Ext**.
- 9**: The **Save** button at the bottom right of the details page.

The main content area shows the **Message-Only Extensions** group. It includes a search bar, a table of extensions, and a detailed view for the selected extension. The details view includes fields for **Short Extension Number**, **Full Extension Number**, **Extension Name**, **Company Name**, **Contact Phone**, **Email**, and **Status**.

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**.



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** option is selected in the left sidebar.

Step 3: The **Message-Only Extensions** option 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: The **Select Message Recipient** modal window appears, showing a list of extensions. A user is selected from the list.

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

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

Select	Name	Ext	Ext	Type	Department
<input type="radio"/>	Brian Smith	Company	11101	User	
<input checked="" type="radio"/>	Customer Care	Company	11102	User	
<input type="radio"/>	Group A	Company	11103	Group Call	
<input type="radio"/>	Joe Hall	Company	11104	User	
<input type="radio"/>	Mad Smith	Company	11105	User	

Setting a voicemail greeting

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

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

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 active, and the 'Admin Portal' is indicated in the top right corner.

The left sidebar contains the following navigation options:

- Company Info
- Phone Numbers
- Auto-Response
- Message-Only Extensions (highlighted with a red circle 2)
- Call Queue
- Ring Only
- Shared Line
- Park Location
- Call Monitoring
- Call Pickup
- Message-Only Extensions (highlighted with a red circle 3)
- Announcement-Only Extensions
- Phone & Device
- Emergency Calling

The main content area is titled 'Groups > Message-Only Extensions'. It includes a search bar and a 'New Message-Only Extension' button. A table lists the extensions, with the first one, 'Message-only Ext (Ext. 1111)', selected (highlighted with a red circle 4). The configuration panel for this extension is shown on the right, featuring sections for 'Message-Only Extension Details', 'Direct Numbers', and 'Messages & Notifications'. The 'Messages & Notifications' section is expanded, showing 'General' and 'Settings' tabs. The 'General' tab is active, displaying the 'Voicemail Greeting' and 'Message Recipient' settings. The 'Voicemail Greeting' is set to 'Default' (highlighted with a red circle 5), and the 'Message Recipient' is set to 'This Extension (Ext. 1111)' (highlighted with a red circle 6). A 'Save' button is visible at the bottom of the configuration panel (highlighted with a red circle 9).

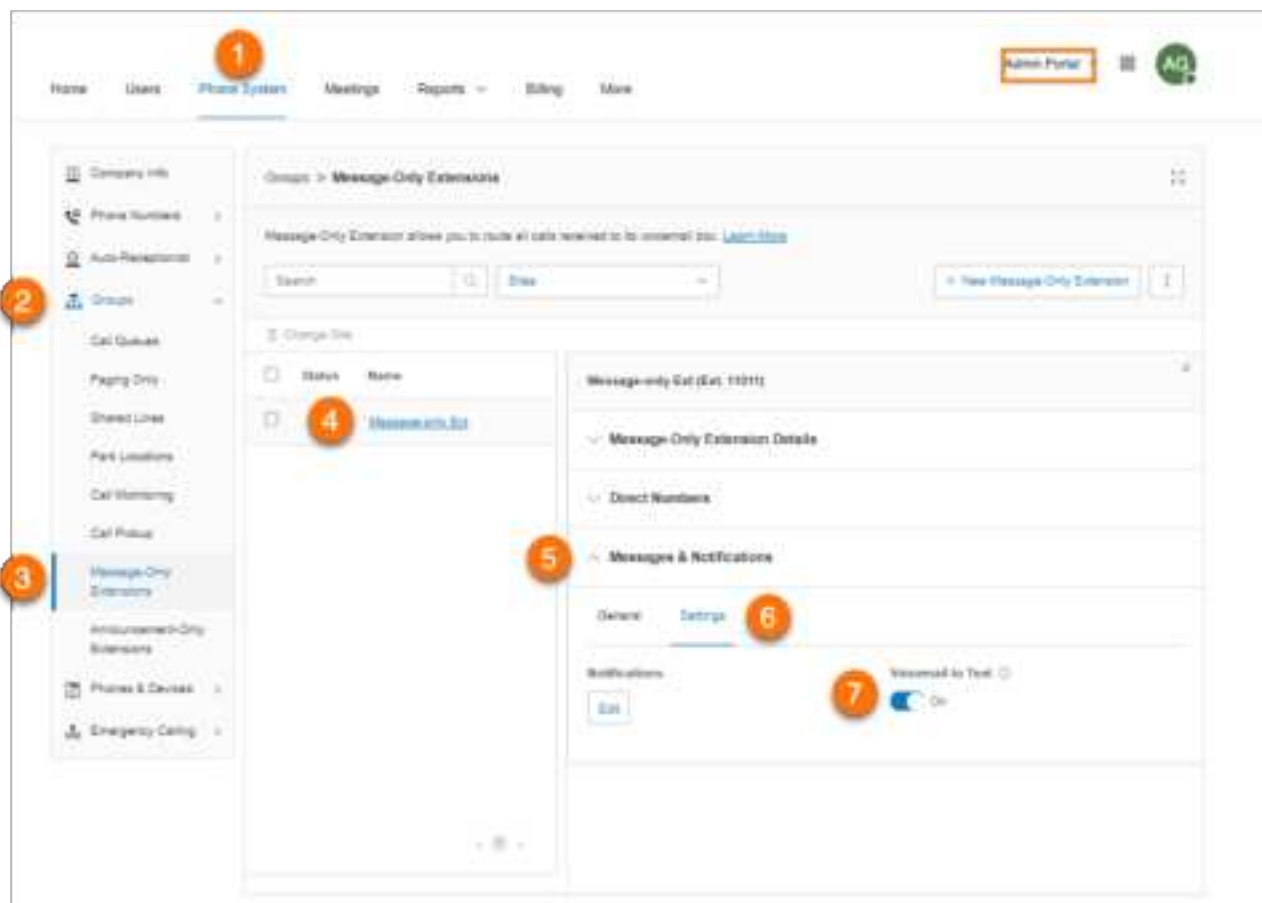
A modal window titled 'Voicemail Greeting' is open in the foreground (highlighted with a red circle 7). It contains the following fields and options:

- 'Set Greeting' dropdown menu set to 'Default'.
- 'Voice ID' dropdown menu set to 'English (U.S.)'.
- A text area containing the message: "Your call has been forwarded to the voicemail for Message-only Ext. No one is available to take your call. At the time, please record your message. When you've finished recording, you may hang up or press the # key for more options."
- A 'Save' button (highlighted with a red circle 8).

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**.



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 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 left sidebar contains various system management options, with 'Message-Only Extensions' highlighted. The main content area shows a search bar and a table of extensions. A modal window titled 'Notifications' is open, allowing users to configure notification preferences for various events.

Numbered Callouts:

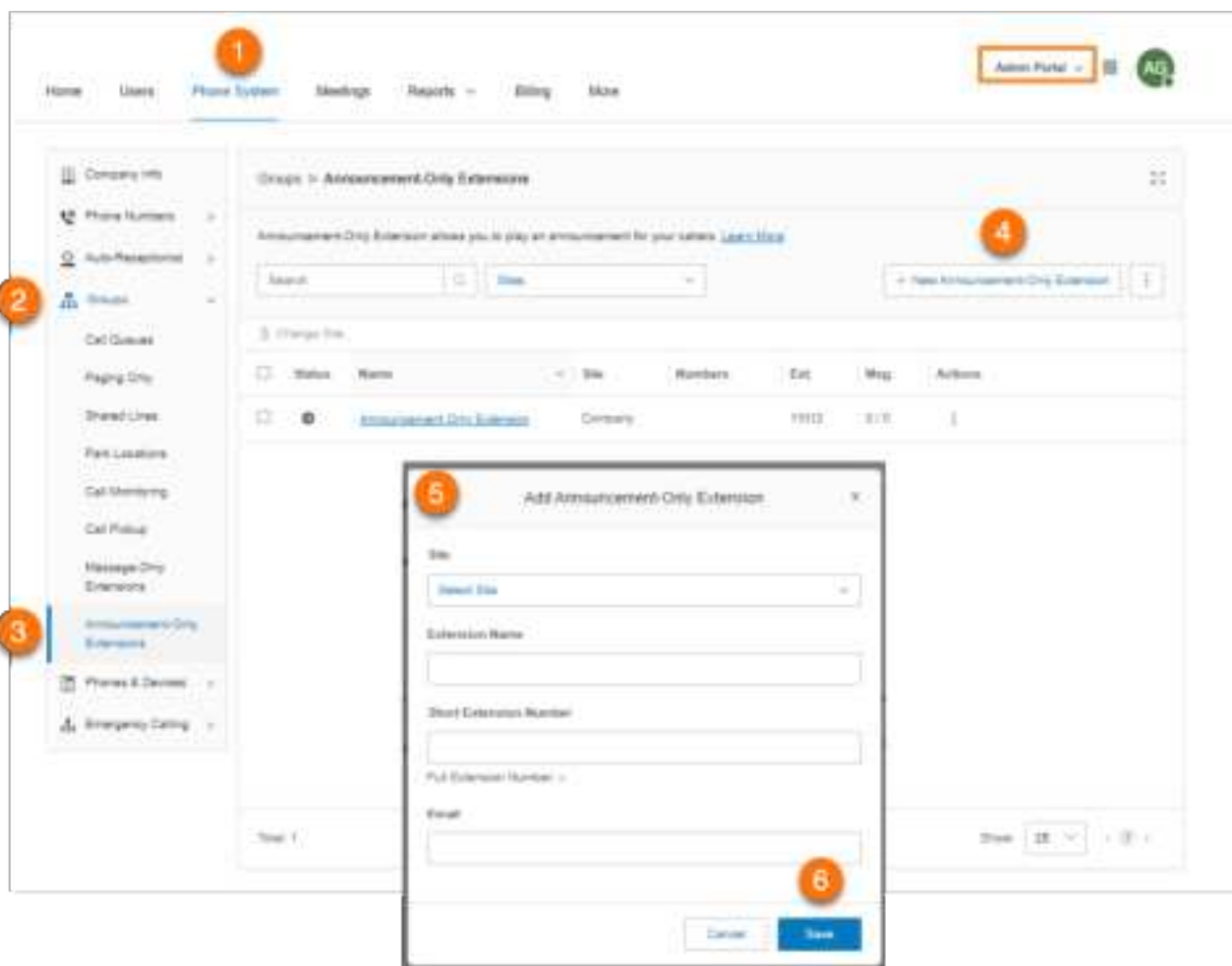
- Admin Portal
- Extensions
- Message-Only Extensions
- Message-Only Extension
- Message-Only Extension Details
- Settings
- Add
- Notifications
- Save

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**.



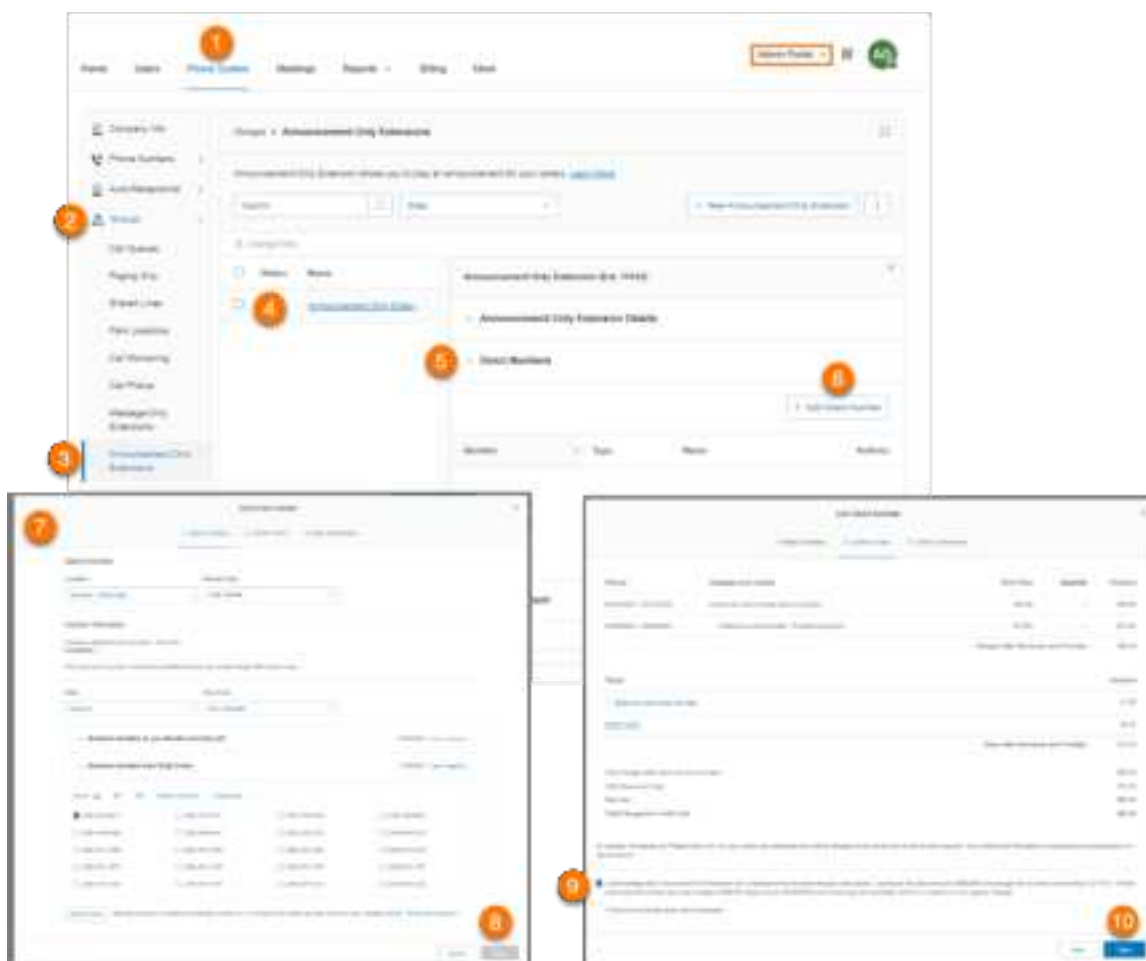
Editing announcement-only extension details

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**

[illegible]

Adding a direct number

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



Setting an announcement

Customize a greeting for an announcement-only extension.

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

The screenshot displays the RingCentral Admin interface for managing extensions. The sidebar on the left contains navigation links: Home, Users, Phone System, Meetings, Reports, Billing, and More. The main content area is titled "Group > Announcement-Only Extensions". It includes a search bar and a table of existing extensions. A modal window titled "Announcement (Creating)" is open, showing fields for "Set Greeting", "Row to", "Single call", and a "Default Greeting" text area. The modal also features a "Cancel" button and a "Save" button.

Numbered callouts indicate the following steps:

1. Click on the "Phone System" tab in the top navigation bar.
2. Click on the "Announcement-Only Extensions" link in the left sidebar.
3. Click on the "Announcement-Only Extensions" link in the left sidebar.
4. Click on the "Announcement-Only Extensions" link in the table.
5. Click on the "Announcement-Only Extensions" link in the table.
6. Click on the "Announcement-Only Extensions" link in the table.
7. Click on the "Announcement (Creating)" modal window.
8. Click on the "Set Greeting" dropdown menu.
9. Click on the "Save" button in the modal window.

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.

The screenshot displays the RingCentral Admin Portal interface for managing limited 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 'Limited Extensions' link in the left sidebar is highlighted. The main content area shows the 'Limited Extensions' group page, which includes a search bar, a 'New Limited Extension' button, and a modal window for adding a new extension. The modal window has four steps: 1. Select Location, 2. Add Limited Extension, 3. Add Shipping Info, and 4. Confirm. The 'Add Limited Extension' step is currently active, showing a search for 'New Limited Extension' and a table of existing extensions.

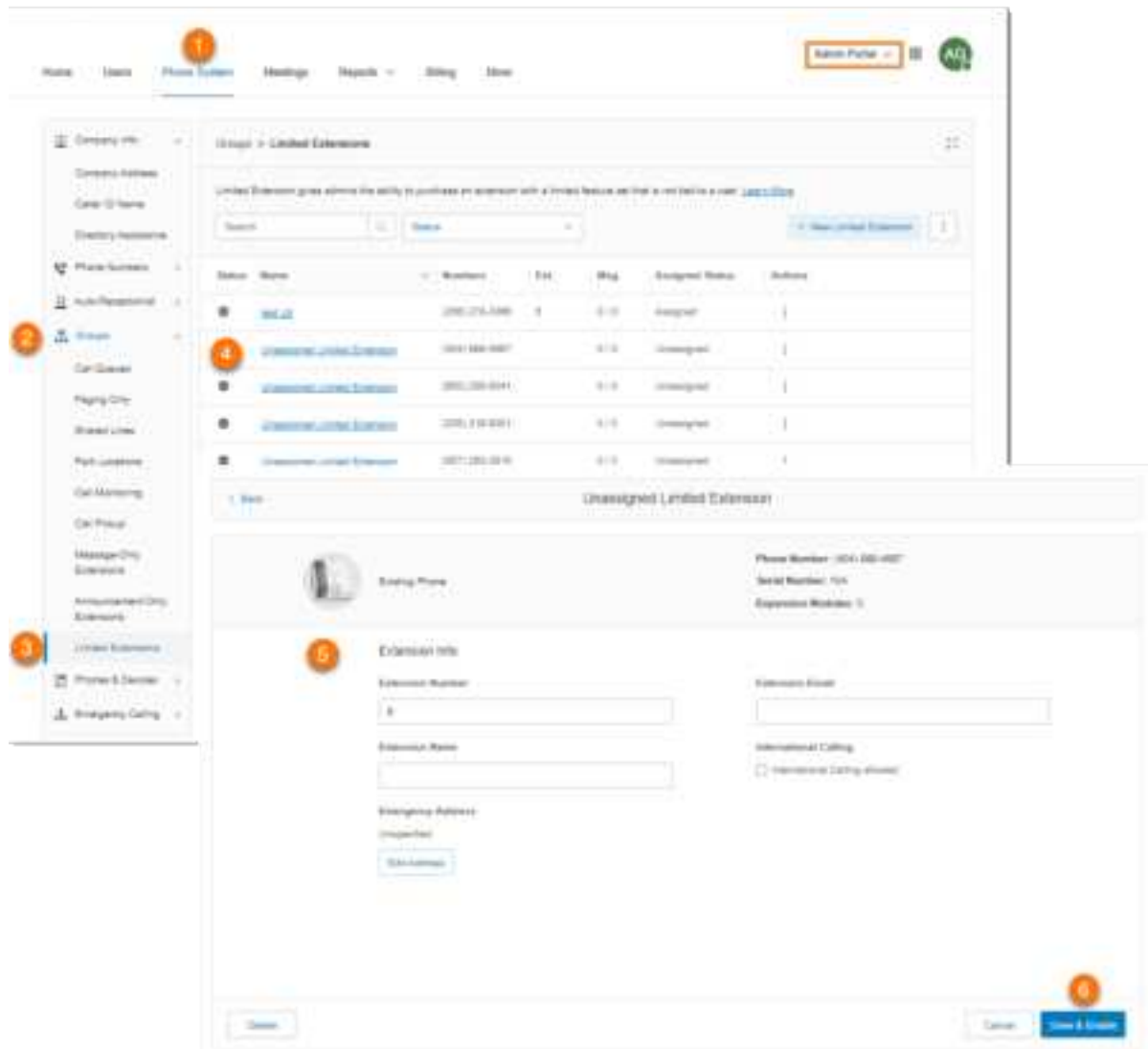
Qty	Cost Center	Rate	Area Code	Number Option	Number
1	Cost Center	Area Code	Number Option	Number	

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**.



Editing limited extension info

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

- **Email**
- **International Calling allowed**
- **Status**

7. Click **Save**.

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

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

1

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

Admin Portal AG

2

Company Info
Phone Number
Auto-Attendant
Groups
Call Queue
Paging Only
Shared Line
Park Locations
Call Forwarding
Call Pickup
Message-Only Extensions
Announcement Only Extensions
Limited Extensions
Phone & Device
Emergency Calling

Groups in Limited Extensions

Limited Extension gives admin 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	Next LE (Est. \$)
test LE		
Unassigned Limited Extension		
Unassigned Limited Extension		
Unassigned Limited Extension		
Unassigned Limited Extension		
Unassigned Limited Extension		

4

test LE

5

Limited Extension Details

6

General Settings

Extension Number
0

Extension Name
test LE

Company Name

Email
test.LE@rc.com

Status
Not Activated
[Send Invite](#)

7

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

8

Limited Extension Details

General Settings

Regional Settings
GMT+08:00 (HKT) (UTC+8)
[Edit](#)

Template
[Apply](#)

Confirmation Message
1 seconds
[Edit](#)

Phone & Numbers

Announcement & Hold Music

Outboard 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**.

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

The left sidebar contains a list of menu items: 'Company Info', 'Phone Numbers', 'Auto-Responder', 'Groups' (highlighted with a red circle 2), 'Call Queue', 'Ring Only', 'Shared Lines', 'Park Locations', 'Call Monitoring', 'Call Pickup', 'Message-Only Extensions', 'Announcements-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 sub-header explaining that 'Limited Extension gives admins the ability to purchase an extension with a limited feature set that is restricted to a user' with a 'Learn More' link. Below this is a search bar and a 'Status' dropdown. A '+ New Limited Extension' button is located in the top right of the main area.

A table lists existing limited extensions, with the first row highlighted by a red circle 4. The table has columns for 'Status' and 'Name'. The first row shows 'test L.E. (Ext. 9)'.

To the right of the table is a 'Limited Extension Details' panel (highlighted with a red circle 5). It has tabs for 'General' and 'Settings'. The 'General' tab is active, showing fields for 'Extension Number' (with a value of 9), 'Extension Name' (with a value of 'test L.E.'), and 'Company Name'. A 'Record Extension Name' button (highlighted with a red circle 6) is located next to the 'Extension Name' field.

A modal dialog titled 'Record Extension Name' is open in the foreground. It contains a 'Record by' dropdown menu (highlighted with a red circle 7) showing 'RingCentral test user', a 'Grading Number' input field (highlighted with a red circle 8), and 'Cancel' and 'Save' buttons (highlighted with a red circle 9).

Adding a direct number

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

1

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

Admin Portal

2

Company Info
Phone Numbers
Auto-Responder
3
Transfer
Call Queue
Paging Only
Shared Lines
Park Location
Call Monitoring
Call Park
Message-Only Extensions
Announcement-Only Extensions
4
5
6
7
8

Groups > Limited Extensions

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

Search Status

New Limited Extension

Status	Name
4	4
5	5
5	5
5	5
5	5
5	5

6

7

8

Add Direct Number

1. Select Number

Location: Domestic - US/Canada Number Type: Local Number Local Number: 1234567890 Area Code: 123

2. Number Information

Location: Domestic - US/Canada - Domestic
Availability: 12
Cost: \$10.00/mo. with 1000 min. usage

3. If the quantity of numbers exceeds the available amount, you will be charged \$4.00/month each.

4. Save

Area Code: 123

5. Add Number

6. Cancel

7. Save

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 selected, and the 'Limited Extensions' sub-tab is active. The sidebar on the left contains various system settings, with 'Limited Extensions' highlighted. The main content area shows a table of 'Limited Extensions' with columns for Status and Name. A modal window titled 'Unavailable Greeting' is open, showing a dropdown for 'Default' and a text area for the greeting message. Another modal window titled 'Hold Music' is also open, showing a dropdown for 'Music' and a text area for the hold music message. Numbered callouts (1-10) indicate specific UI elements: 1. Admin Portal link; 2. Limited Extensions link in the sidebar; 3. Limited Extensions link in the main content area; 4. Status column header; 5. Name column header; 6. Unavailable Greeting modal title; 7. Hold Music modal title; 8. Music dropdown; 9. Music text area; 10. Save button.

1 Admin Portal

2 Limited Extensions

3 Limited Extensions

4 Status

5 Name

6 Unavailable Greeting

7 Hold Music

8 Music

9 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 Phone System

2 Limited Extensions

3 Limited Extensions

4 Add

5 Gateway Caller ID

6 Sending Phone

7 Select Number

8 Select Number

9 Select Number

10 Internal Calls

1 Search

2 New Limited Extension

3 Limited Extension Details

4 Phone & Numbers

5 Announcement & Hold Music

6 Gateway Caller ID

7 Sending Phone

8 Alternate Caller ID

9 Internal Calls

10

11

12

13

14

15

16

17

18

19

20

21

22

23

24

25

26

27

28

29

30

31

32

33

34

35

36

37

38

39

40

41

42

43

44

45

46

47

48

49

50

51

52

53

54

55

56

57

58

59

60

61

62

63

64

65

66

67

68

69

70

71

72

73

74

75

76

77

78

79

80

81

82

83

84

85

86

87

88

89

90

91

92

93

94

95

96

97

98

99

100

101

102

103

104

105

106

107

108

109

110

111

112

113

114

115

116

117

118

119

120

121

122

123

124

125

126

127

128

129

130

131

132

133

134

135

136

137

138

139

140

141

142

143

144

145

146

147

148

149

150

151

152

153

154

155

156

157

158

159

160

161

162

163

164

165

166

167

168

169

170

171

172

173

174

175

176

177

178

179

180

181

182

183

184

185

186

187

188

189

190

191

192

193

194

195

196

197

198

199

200

201

202

203

204

205

206

207

208

209

210

211

212

213

214

215

216

217

218

219

220

221

222

223

224

225

226

227

228

229

230

231

232

233

234

235

236

237

238

239

240

241

242

243

244

245

246

247

248

249

250

251

252

253

254

255

256

257

258

259

260

261

262

263

264

265

266

267

268

269

270

271

272

273

274

275

276

277

278

279

280

281

282

283

284

285

286

287

288

289

290

291

292

293

294

295

296

297

298

299

300

301

302

303

304

305

306

307

308

309

310

311

312

313

314

315

316

317

318

319

320

321

322

323

324

325

326

327

328

329

330

331

332

333

334

335

336

337

338

339

340

341

342

343

344

345

346

347

348

349

350

351

352

353

354

355

356

357

358

359

360

361

362

363

364

365

366

367

368

369

370

371

372

373

374

375

376

377

378

379

380

381

382

383

384

385

386

387

388

389

390

391

392

393

394

395

396

397

398

399

400

401

402

403

404

405

406

407

408

409

410

411

412

413

414

415

416

417

418

419

420

421

422

423

424

425

426

427

428

429

430

431

432

433

434

435

436

437

438

439

440

441

442

443

444

445

446

447

448

449

450

451

452

453

454

455

456

457

458

459

460

461

462

463

464

465

466

467

468

469

470

471

472

473

474

475

476

477

478

479

480

481

482

483

484

485

486

487

488

489

490

491

492

493

494

495

496

497

498

499

500

501

502

503

504

505

506

507

508

509

510

511

512

513

514

515

516

517

518

519

520

521

522

523

524

525

526

527

528

529

530

531

532

533

534

535

536

537

538

539

540

541

542

543

544

545

546

547

548

549

550

551

552

553

554

555

556

557

558

559

560

561

562

563

564

565

566

567

568

569

570

571

572

573

574

575

576

577

578

579

580

581

582

583

584

585

586

587

588

589

590

591

592

593

594

595

596

597

598

599

600

601

602

603

604

605

606

607

608

609

610

611

612

613

614

615

616

617

618

619

620

621

622

623

624

625

626

627

628

629

630

631

632

633

634

635

636

637

638

639

640

641

642

643

644

645

646

647

648

649

650

651

652

653

654

655

656

657

658

659

660

661

662

663

664

665

666

667

668

669

670

671

672

673

674

675

676

677

678

679

680

681

682

683

684

685

686

687

688

689

690

691

692

693

694

695

696

697

698

699

700

701

702

703

704

705

706

707

708

709

710

711

712

713

714

715

716

717

718

719

720

721

722

723

724

725

726

727

728

729

730

731

732

733

734

735

736

737

738

739

740

741

742

743

744

745

746

747

748

749

750

751

752

753

754

755

756

757

758

759

760

761

762

763

764

765

766

767

768

769

770

771

772

773

774

775

776

777

778

779

780

781

782

783

784

785

786

787

788

789

790

791

792

793

794

795

796

797

798

799

800

801

802

803

804

805

806

807

808

809

810

811

812

813

814

815

816

817

818

819

820

821

822

823

824

825

826

827

828

829

830

831

832

833

834

835

836

837

838

839

840

841

842

843

844

845

846

847

848

849

850

851

852

853

854

855

856

857

858

859

860

861

862

863

864

865

866

867

868

869

870

871

872

873

874

875

876

877

878

879

880

881

882

883

884

885

886

887

888

889

890

891

892

893

894

895

896

897

898

899

900

901

902

903

904

905

906

907

908

909

910

911

912

913

914

915

916

917

918

919

920

921

922

923

924

925

926

927

928

929

930

931

932

933

934

935

936

937

938

939

940

941

942

943

944

945

946

947

948

949

950

951

952

953

954

955

956

957

958

959

960

961

962

963

964

965

966

967

968

969

970

971

972

973

974

975

976

977

978

979

980

981

982

983

984

985

986

987

988

989

990

991

992

993

994

995

996

997

998

999

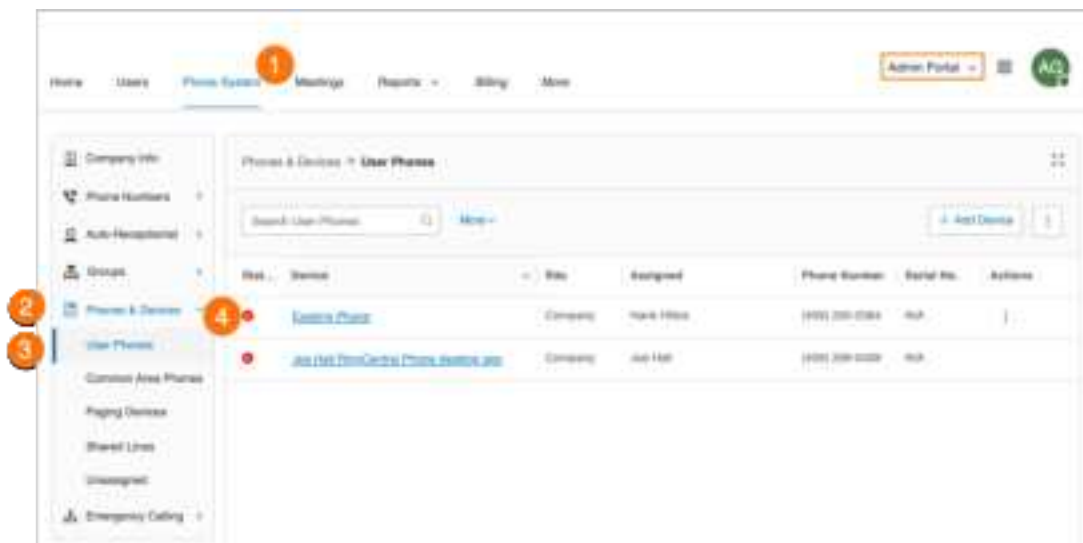
1000

Phones and Devices

This section provides you a view of all phones that are associated with your RingCentral MVP account. You can also add phones and devices, change a phone, and reassign a phone from this section,

Viewing and editing devices

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click on the following tabs to see the following:
 - a. **User Phones**
 - b. **Common Area Phones**
 - c. **Paging Devices**
 - d. **Shared Lines**
 - e. **Unassigned**
4. Click on a device to view and edit details.



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.

The first screenshot shows the RingCentral Admin Guide interface. The 'Phones & Devices' menu is highlighted in the left sidebar. The 'Add New Phone' button is visible in the top right corner of the 'Phones & Devices' section.

The second screenshot shows the 'Add New Phone' dialog box. The 'Add New Phone' button is highlighted. The dialog box contains a 'Name & Location' section with a 'Name' field and a 'Location' dropdown menu.

The third screenshot shows the 'Add New Phone' form. The 'Name' field is highlighted. The form includes a table with columns for 'Name', 'Model', 'Type', 'Age', and 'Department'. The table contains two rows of data:

Name	Model	Type	Age	Department
John Doe	iPhone 12	Computer	100%	
Jane Smith	iPhone 12	Computer	100%	

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

Note: When adding international phones, you will also need to register an emergency address in the selected country for your phone. Review these details when confirming your order.

The image displays four sequential screenshots of the RingCentral Admin Guide interface, illustrating the steps to add a new phone.

Step 9: Assign a number
This screen shows the 'Assign Number' section. It includes a search bar for 'Find Number' and a list of available numbers. The 'Next' button is visible at the bottom right.

Step 10: Add an emergency address
This screen shows the 'Emergency Address' section. It includes a search bar for 'Find Address' and a list of available addresses. The 'Next' button is visible at the bottom right.

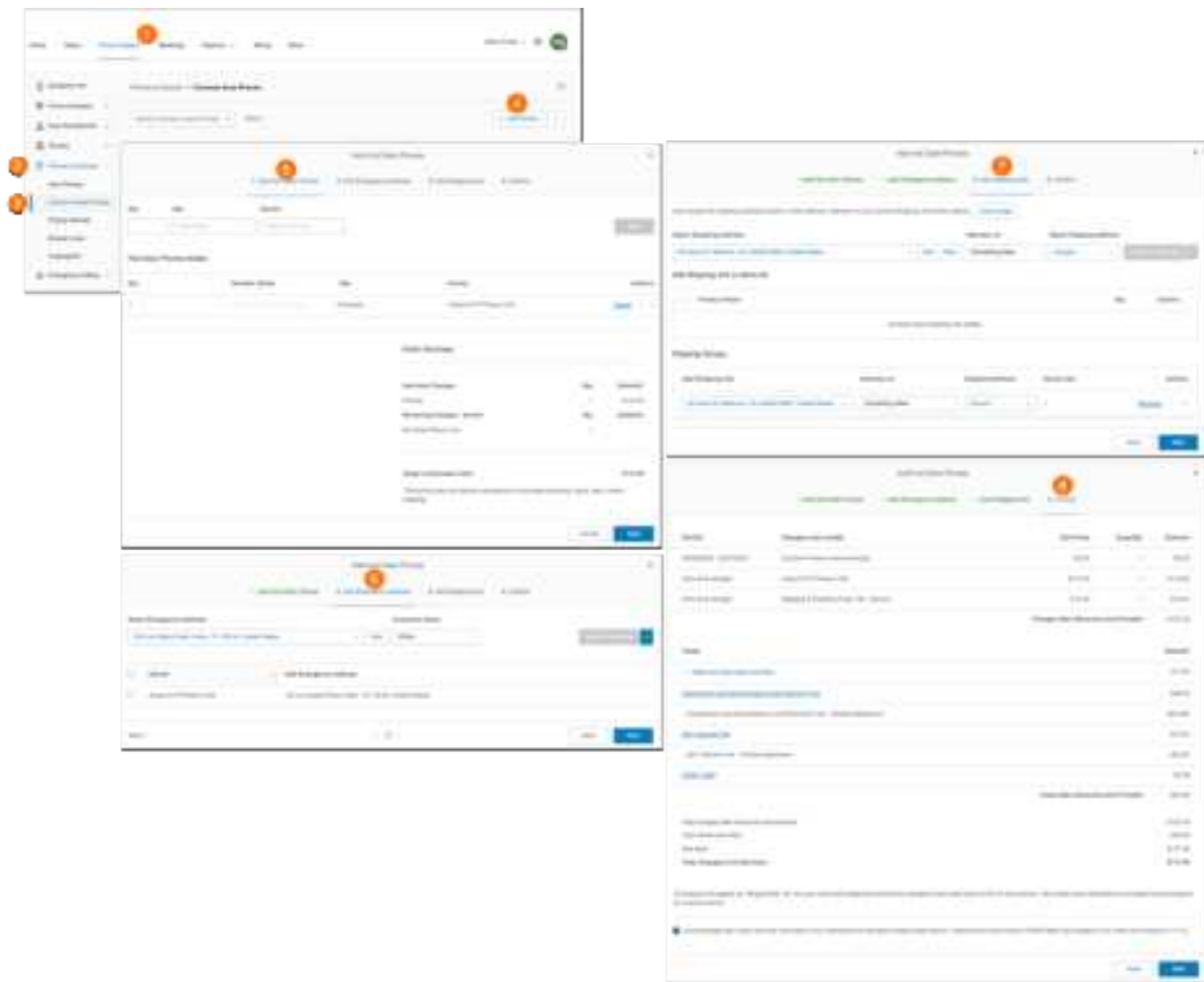
Step 11: Select shipping preferences
This screen shows the 'Shipping Preferences' section. It includes a search bar for 'Find Shipping Method' and a list of available shipping methods. The 'Next' button is visible at the bottom right.

Step 12: Confirm your order
This screen shows the 'Confirm Order' section. It includes a table with columns for 'Item', 'Quantity', 'Unit Price', 'Total Price', and 'Status'. The table lists various items and their associated prices. The 'Next' button is visible at the bottom right.

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**.



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 displays the RingCentral Admin Portal interface. The sidebar on the left contains navigation options: Home, Users, Phone System (highlighted with a red circle 1), Meetings, Reports, Skills, and More. Under Phone System, there are links for Company Info, Phone Numbers, Auto-Registration, Groups, Phones & Devices (highlighted with a red circle 2), and Emergency Calling. Under Phones & Devices, there are links for User Phones, Common Area Phones, Paging Devices (highlighted with a red circle 3), Shared Lines, and Unassigned. The main content area shows the 'Phones & Devices' section with a 'Paging Devices' sub-section. A search bar and a '+ Add Device' button (highlighted with a red circle 4) are visible. The 'Add Paging Device' modal is open, showing two tabs: 'Device Information' and 'Provisioning Info'. The 'Device Information' tab is active, displaying a list of supported devices: 'CyberVoice SIP-enabled IP-PX Paging Speaker' and 'CyberVoice SIP-enabled IP-PX Paging Amplifier'. A text input field for 'Paging Device Name' (highlighted with a red circle 5) contains the text 'Paging device 1'. A 'Next' button (highlighted with a red circle 6) is at the bottom right. The 'Provisioning Info' tab is also visible, showing a list of provisioning information for CyberVoice paging devices. The 'Provisioning Info' tab is highlighted with a red circle 7. The 'Provisioning information for CyberVoice paging devices' section includes a note: 'CyberVoice paging devices need to be programmed with the information given below to make them fully functional when assigned to paging groups.' Below this, there are three steps: Step 1: 'Open a web browser, connect to the CyberVoice device. Please consult the vendor documentation for details on how to determine the IP address of your device and how to enter the device's login credentials.' Step 2: 'Navigate to the following page and confirm that the device is configured for SIP 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.' Below the steps, there is a table with fields for configuration: 'Phone' (SIP domain: sip.ringcentral.com), 'Remote SIP port' (5060), 'Local SIP port' (5060), 'Outbound Proxy' (sip.ringcentral.com), 'Outbound Proxy Port' (5060), 'User Name' (xxxxxxxxxxxxxxxxxxxx), 'Authentication ID' (xxxxxxxxxx), and 'Password' (p@ssw0rd).

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](#).

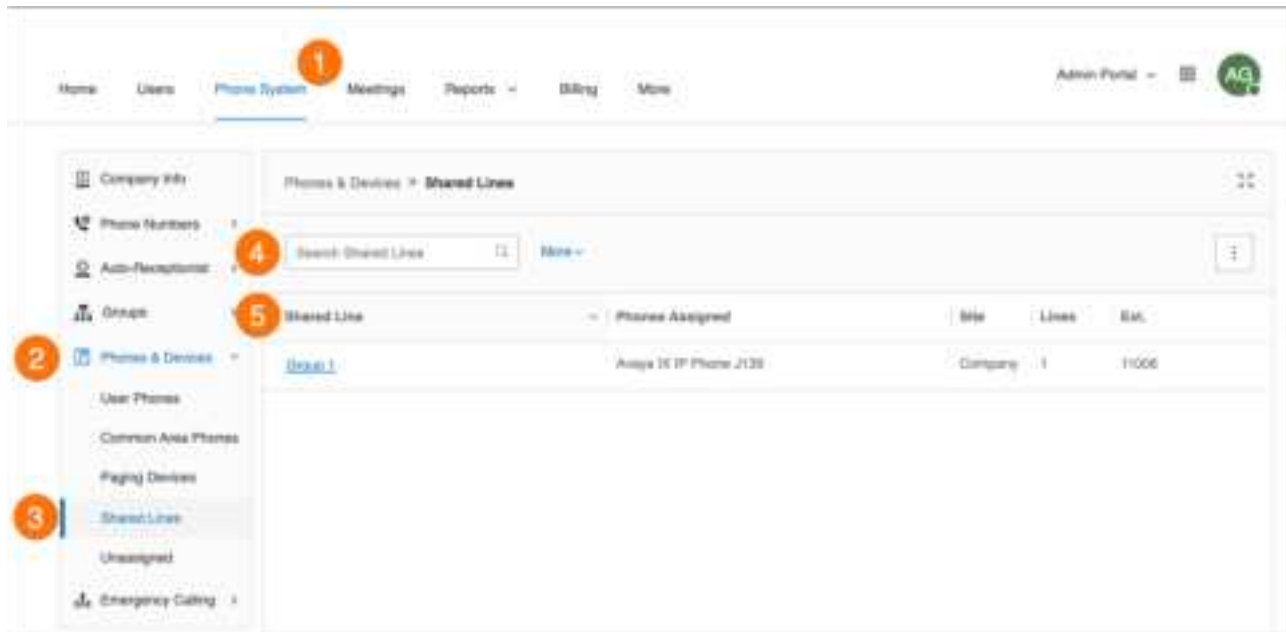
Reassigning a phone

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**.



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 Guide. 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. A 'Select Profile' dropdown and a user profile icon are also present.
- Left Sidebar:** Contains a 'Phones & Devices' menu (highlighted with a red circle 2) and other options like 'Complete Info', 'Phone Numbers', 'Auto-Provisioning', 'Users', 'Phone & Settings', 'User Phones', 'Connect New Phones', 'Paging Devices', 'Shared Lines', 'Unassigned' (highlighted with a red circle 3), and 'Emergency Calling'.
- Main Content Area:**
 - Phone & Settings > Unassigned:** A search bar and a '+ Add Devices' button (highlighted with a red circle 4) are visible.
 - Buy Unassigned Phone:** A modal window with a progress bar showing five steps: 1. Select Location, 2. Select Device, 3. Add Shipping Info, 4. Confirm, and 5. Buy (highlighted with a red circle 5).
 - Select a Location:** A screen with radio buttons for 'Domestic' (selected) and 'International'.
 - Select Device:** A screen showing a list of devices. The 'Analog DE IP Phone J130' is selected. The device details include a description, features, and a 'Download Datasheet' link. The price is \$114.00.
 - Order Summary:** A table showing the 'One-time Charges' for the 'Phone' at \$114.00. The 'Today's Estimated Total' is also \$114.00.

- [illegible]

Enabling video calls

You can enable video on internal point-to-point calls in your RingCentral MVP account. Supported devices include the Polycom VVX 501/500 and 601/600 (supporting detachable cameras for video calling).

Phones with video support include video codecs with audio for all outbound calls. No new firmware is required for the Polycom phones to enable video.

This feature is available as a on-demand feature for Premium and Ultimate tiers. Contact support to ask about this feature.

To enable video:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**, then click **User Phones**.
3. Select a supported phone.
4. Check the box next to **Enable Video Calling**.
5. Click **Save**.

Note: You can enable video calling for multiple devices by multi-selecting the Polycom devices in the list and enabling video calling in bulk.

The phone will be resynchronized to make and receive video calls with similarly configured devices within your RingCentral MVP account.

Common area phones

Hot desking or common area phone enables any employee to log in to a hot desk phone that adopts the user's phone settings. Employees who travel from different offices can share the same hot desk phone and desk while keeping their own extension profiles and voicemail access.

Types of hot desk phones

The following configurations of hot desk phones that support access to hot desking are available to support your business needs:

- **Hot desk (common) phone:** An employee visiting from a different office can log in to a hot desk phone and use it as their own, accessing their own extensions, profiles, voicemail, and other phone features. Hot desk phones do not provide any telephony support unless the guest user activates them by entering their credentials (except for making emergency calls).
- **Hot desking for limited extension:** Limited extensions are installed in common areas (meeting rooms or in hotel rooms) for anyone who has the need to access basic inbound/outbound calling capabilities. With Hot Desking for Limited Extension, a visiting employee can log in to a limited extension phone and use it as their own with access to full telephony features. Hot desking enables field sales and remote employees to work in a variety of spaces when visiting different offices and the fact that this feature is available on limited extension phones ensures that the hardware still provides functional value for on-site employees in all other cases.

Phone support and setup

You can either purchase a new phone that supports Hot Desking, or convert an existing unassigned Polycom VVX phone to a hot desk phone. Supported phone models are the Polycom VVX 310, 311, 410, 411, 500, 501, and 601.

Using hot desking for limited extension

Calls are routed to a Hot Desking for Limited Extension phone as follows:

- **Calls to the Guest User:** the limited extension device is added to the forwarding rules of User Business Hours and After Hours (if it has forwarding rule). Calls are routed to a Limited Extension device based on the active answering rule of the guest user.
- **Calls to Limited Extension** are still routed to its device: Extension, DID, or DL number, and paging calls. However, calls to the phone number of the Limited Extension DL follow the guest answering rules.

After logging out through the logout soft key on the physical phone device, the phone resumes operation as a limited extension device.

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

Enabling a limited extension phone for hot desking

To enable a visiting employee to log in to a limited extension phone and use it as their own with access to full telephony features:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Common Area Phones**.
4. Select a **Limited Extension** to view the device details.
5. Click the checkbox for **Use as Hot Desk Phone**.
6. Click **Save**.

Note: On the **Phone & Devices** page, the device type is now identified as **Limited Ext + Hot Desk**.

A login softkey is provisioned on the device. Once a guest user is logged in, the device details page displays the guest user name.

Converting an unassigned phone to a hot desk phone

Converting an unassigned phone to a hot desk phone makes that phone only available for use in hot desking. No minutes are included for any type of calls.

To convert an unassigned phone to a hot desk phone:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Unassigned**. Select an unassigned phone.
4. Under Phone Details, select **Convert to Common Phone**.
5. Follow the instructions to complete the conversion.

Unassigning a hot desk phone

You can unassign a hot desk phone to remove it from hot desking use, and return it to the list of unassigned devices. To unassign a hot desk phone:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Common Area Phones**.
4. Select a hot desk phone.
5. Under Phone Details, select **Unassign Phone** The phone is returned to Unassigned phones.

Logging out a hot desk phone

You can log out the currently logged in user from the hot desk phone. To log out a hot desk phone:

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Phones & Devices**.
3. Click **Common Area Phones**.
4. Select one or more hot desk phones.
5. Click **Logout**.

The currently logged in users are logged out from the selected phones.

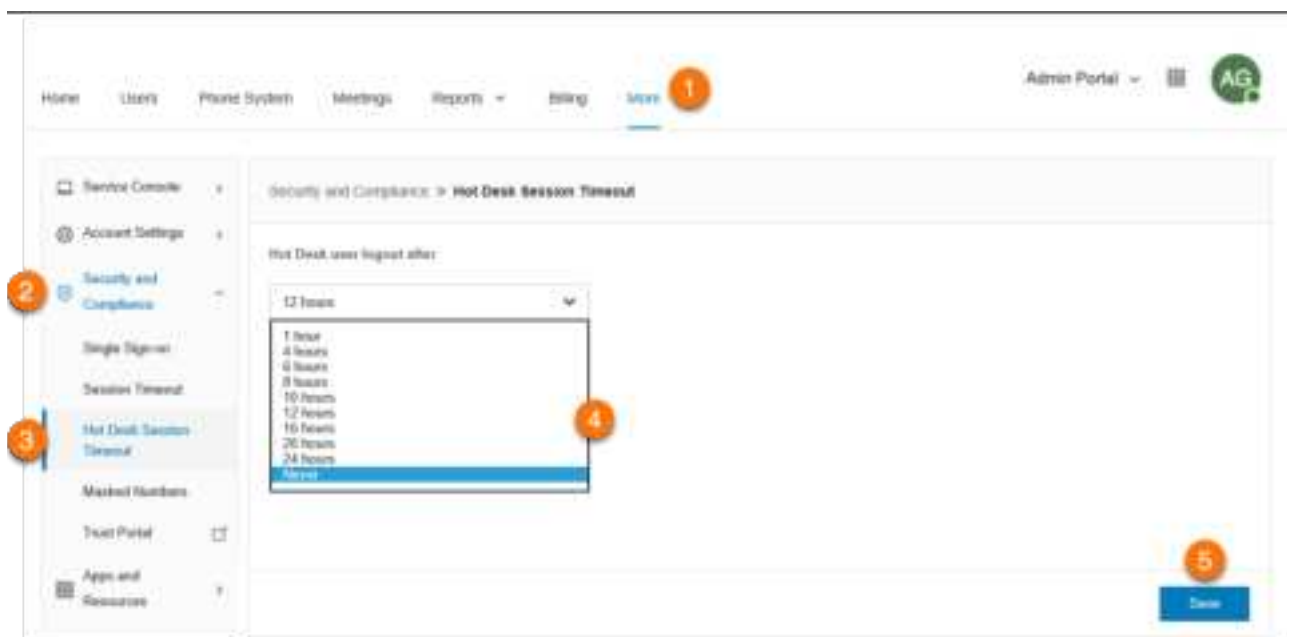
Setting the hot desking session timeout

The hot desking session timeout specifies the time period when guest users will be logged out from phone endpoints. The default session timeout is 12 hours.

Certain enterprises with a mobile workforce may use the 'Never' value for the timeout to configure that all hot desk sessions in the account will not timeout. When using this option, the hot desk session can only be logged out by a user from the phone.

To set session timeout for all hot desk phones on the system:

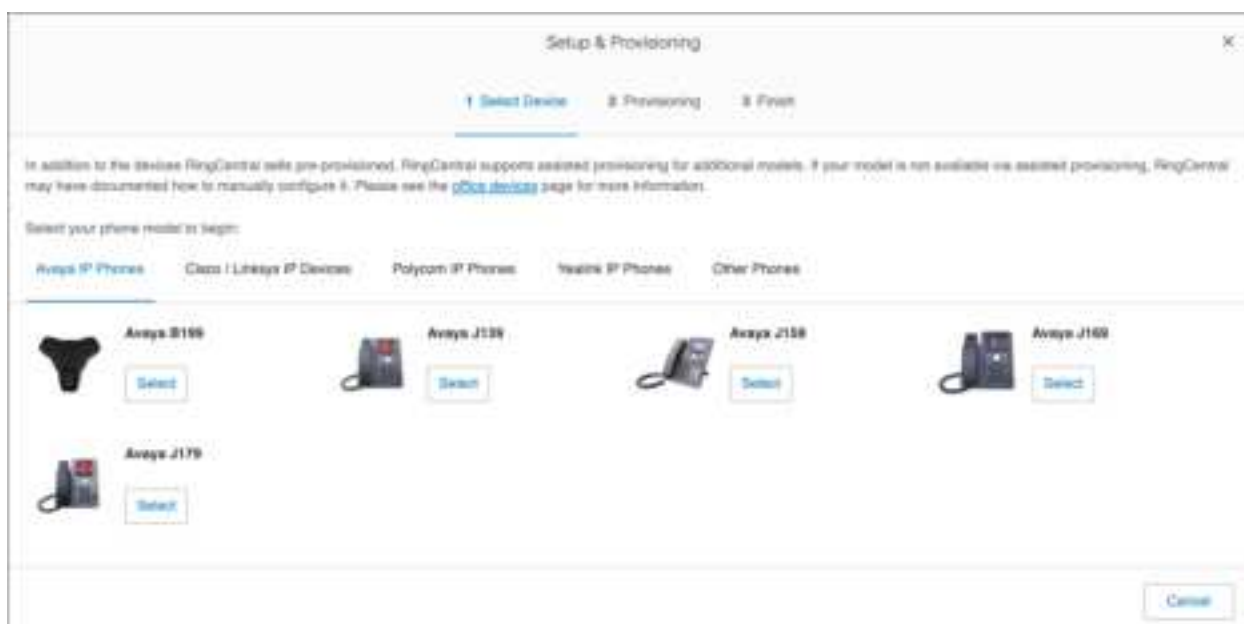
1. Click the **More** tab from the **Admin Portal**.
2. Select **Security and Compliance**.
3. Select **Hot Desk Session Timeout**.
4. Select the duration from the list provided. To configure no timeouts, select the **Never** value.
5. Click **Save**.



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.



Automatic Location Updates

RingCentral MVP supports automatic location detection of certain devices and apps. This allows the most current location to be made available when a user dials 911 from these endpoints. Location detection is based on the application or device's interaction with network infrastructure elements with known locations, such as WiFi access points, IP address ranges, and/or Ethernet switch MAC addresses.

Note: This feature is currently in controlled release. Contact your RingCentral account manager to have this feature enabled for your account.

Current support covers the following endpoints:

- RingCentral app for desktop
- Polycom VVX x50 hard phones

Setting up emergency response location

Emergency Response locations (ERLs) represent the business locations where end users will be using their RingCentral service to make phone calls. The scope of an ERL depends on physical/geographic coverage needs. It should be defined to assist emergency responders in locating a 911 caller in a reasonable amount of time.

Typical examples include:

- SOHO customer : Single ERL referring to a single address.
 - SMB customer : Single ERL referring to a single address and possible a suite # in an office building.
 - Enterprise customer: Multiple ERLs referring to buildings on a campus, buildings in different geographic locations, possibly one ERL per floor in a multi-story office park.
1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Emergency Response Locations**.
 2. Toggle the **Enable Emergency Response Locations** switch on to enable the feature.
Important note: This enables the use of emergency response location for your account. This action is not reversible.
 3. Click **+ Add Emergency Response Location**.
 4. Enter a **Nickname** for the emergency response location.
 5. Click **Edit** under **Emergency Address**.
 6. Fill up the address information, then click **Done**.
 7. Click **Add**.

Note: You can also check **Private Location** to make the private emergency response location visible only to the selected owner.

Automatic location updates for RingCentral app for desktop

The location detection for the RingCentral app for desktop is based on the app's interaction with network infrastructure elements with known locations, such as [WiFi access points](#) and/or [IP address ranges](#).

The RingCentral app for desktop dynamically detects and reports changes in WiFi BSSID or IP address. It looks up the location and then updates the emergency location for the app.

Note that only the desktop version of the RingCentral app supports Nomadic 911. The web version doesn't support it.

Automatic location updates for compatible desk phones

Prerequisites:

- Polycom VVX x50 Desk Phone/s (VVX 150, 250, 350, or 450)
- Hardwired ethernet connection (WiFi connected Desk Phones are not supported)
- Managed ethernet switch/es (LLDP enabled)

RingCentral account admin defines a network map in the Admin Portal to specify on-net locations by IP Address ranges with corresponding physical address/es or Chassis IDs of ethernet switches with corresponding physical address/es. If location lookup is successful, the emergency address is automatically updated upon restart.

Note: If location lookup is unsuccessful, the phone is deemed as Off-Net and a notification is sent to the admin allowing them to deal with the situation. Phones in Off-Net status will enter a restricted calling state: No PSTN calling, only calls within account.

Before enabling the Automatic Location Updates, you must add your [ethernet switches to the Switch Map](#) or [add your IP addresses to the IP Address Range Map](#).

Enabling automatic location updates of compatible desk phones

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Status > Automatic Location Updates for Compatible Desk Phones**.
3. Turn on the toggle switch for **Enable Automatic Location Updates for Compatible Desk Phones**.
4. Tick the checkbox for **Accept legal disclaimers**, then click **Confirm**.

Setting up the network infrastructure with known locations

Location detection is based on the application or device's interaction with network infrastructure elements with known locations, such as WiFi access points, IP address ranges, and/or Ethernet switch MAC addresses.

Adding wireless access point to the wireless access point map

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Wireless Access Point Map**.
3. Click **+ Access Point**.
4. Enter the **BSSID** (Mac address of the wireless access point) and **Nickname** of the Wireless Access Point.
Note: BSSID is not the same as the SSID of the access point.
5. Select an **Emergency Response Location**, then click **Save**.

Adding an IP address range to the IP address range map

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **IP Address Range Map**.
3. Click **+ Add Network**.
4. Enter the **Network Name** and select the **Site** (for multi-site accounts).
5. Click **+ Add** in the **Public IP Address(es)** section.
6. Select **Single** or **Range**, then enter the IP address or IP address range, and then click **Save**.
7. Click **+ Add** in the **Private IP Addresses** section.
8. Select **Single** or **Range**, then enter the IP address or IP address range.
9. Enter a **Nickname** and select an **Emergency Response Location**, then click **Save**.
10. Click **Save**.

Note: IP address ranges need to be specified as the combination of public IP address and all private IP ranges. For example: your devices are in the following private network range : 192.169.10.0 - 192.168.10.255. You also have two IP addresses from your Internet Service Provider. To define this network you would add the network, add two single IP addresses as public IP addresses as well as one private IP address range using the steps described above.

Adding an ethernet switch to switch map

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Switch Map**.
3. Click **+ Add Switch**.

4. Enter the **Chassis ID** and **Nickname** of the ethernet switch. In many cases, the Chassis ID will be the MAC address of the switch.
5. Select an **Emergency Response Location**, then click **Save**.

Selecting a User extension to be treated as nomadic

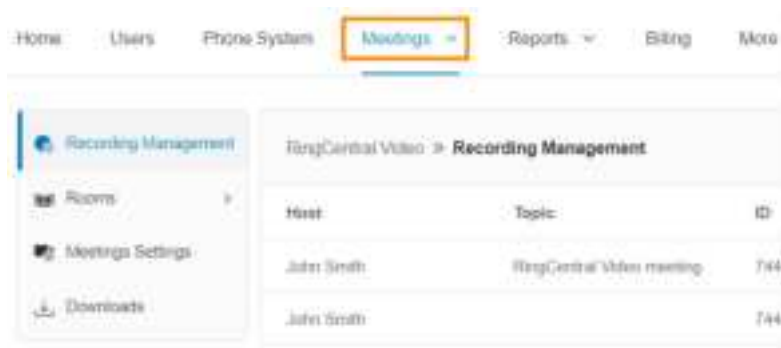
After enabling the Automatic Location Updates, you can select a User Extension to be treated as nomadic.

1. From the **Admin Portal**, navigate to **Phone System > Emergency Calling > Automatic Location Updates**.
2. Click **Extensions**.
3. Select the User extension to be treated as nomadic by clicking **Activate** at the top of the **Status** column. To remove a User Extension, select the extension, then click **Deactivate** at the top of the **Name** column.

Meetings

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

- Recording Management
- Rooms
- Meetings Settings
- Downloads



Accessing and managing Rooms

When you have purchased a RingCentral Rooms License and set up the hardware for your RingCentral Rooms system, you can access and manage it on your online account.

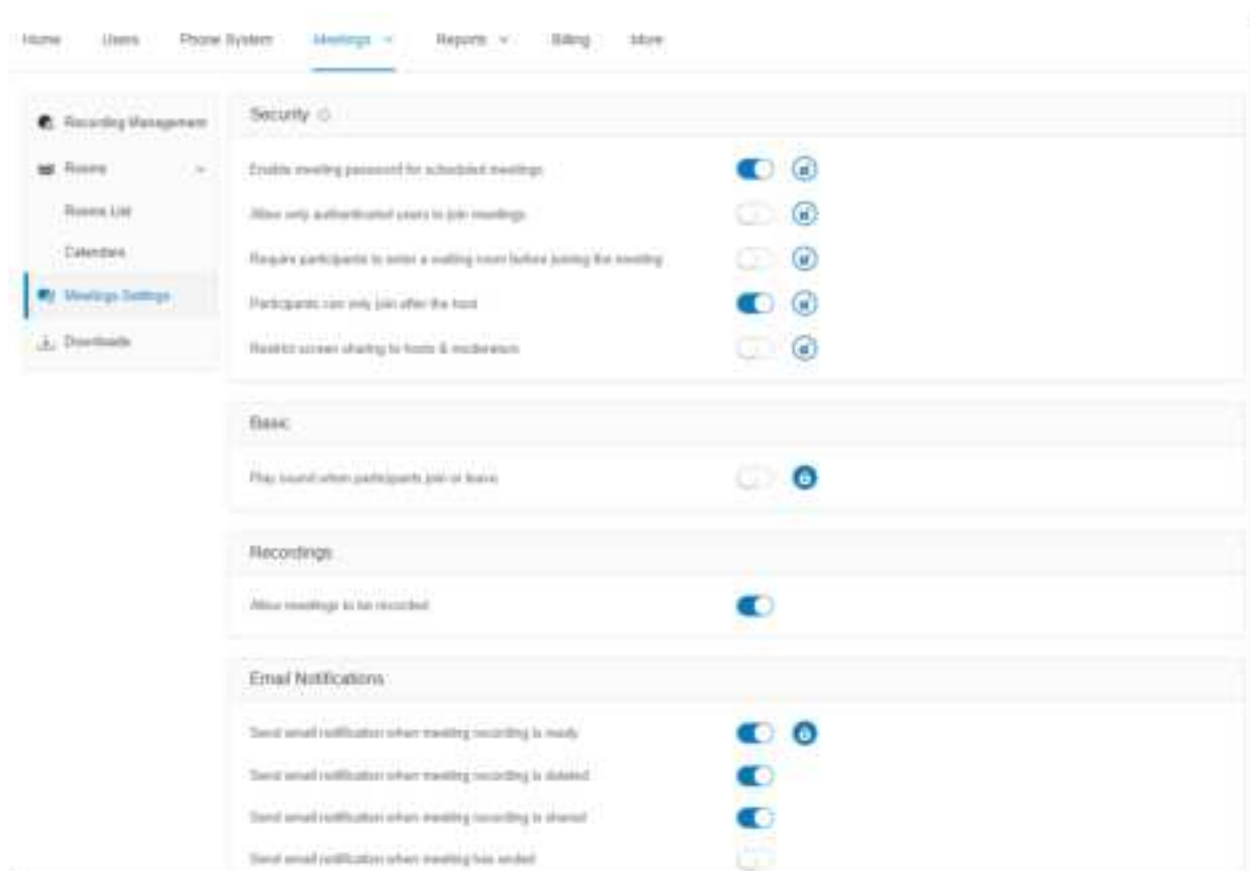
1. Click the **Meetings** tab from the **Admin Portal**.
2. Click **Rooms**. You can view the following tabs:
 - **Rooms List:** This menu lets you view the list of all Devices and Rooms in the account. It also allows you to modify the Global Settings, add or edit Locations and Rooms, upgrade all Devices, and export rooms.
 - **Calendars:** This tab allows you to add Calendar Services (Google Calendar, Office 365, Exchange) that can be integrated with RingCentral Rooms. It also lets you authorize or deauthorize, sync, and delete calendars.



Managing Meetings settings

RingCentral Video allows admins and users to conveniently control the features with a user-friendly settings interface that is available on the RingCentral online account. Account admins have the capability to enable and disable RingCentral Video features that will be applied for all RingCentral Video users on the account.

1. Click the **Meetings** tab from the **Admin Portal**.
2. Click **Meetings Settings**.
3. Admins can enable and disable RingCentral Video features on their account. The following sections are available:
 - a. **Security**
 - b. **Basic**
 - c. **Recordings**
 - d. **Email Notifications**



Call log reports

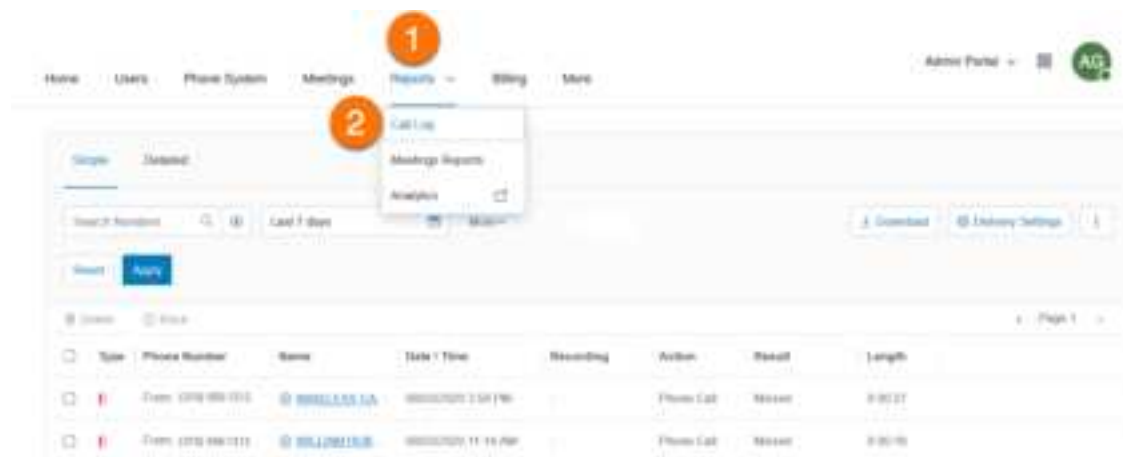
The Call Log reports on inbound and outbound calls and faxes for the company number and specified extensions. The Call Log is available as a **Simple** view, which concisely summarizes the calls, and as a **Detailed** view, which shows additional call record details.

You can filter the call log records by number, time period, call direction or type of call (inbound or outbound). Select your filter criteria, and click **Apply** to refresh the log. In **Delivery Settings**, you can set delivery of the call log to an email address on a daily, weekly, or monthly basis, on a specified day.

In the **Type** column you can see the types of calls. In the **Recording** column, you will see an icon if the call has been recorded. Click the play icon to hear a recording.

To access the call log:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Call Log**.



Downloading call log and recorded calls

You can download the Call Log in .csv format and the recorded calls in mp3 format from the Call Log page. The downloaded file will only contain the details of the filter you have selected.

Downloading the Call Log and recorded calls may take some time and may possibly time out. The Background Call Log feature makes it possible to avoid your downloads from timing out and lets you work in the background or switch to another page on your RingCentral Online account. Contact Support or your Account Manager to have the Background Call Log feature enabled.

To download your call log and recorded calls:

1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Call log**.
3. Click the Type of View: **Simple** or **Detailed**.
4. Filter the information that you wish to include in the Call Log Report.
5. Click **More** to select other information filters.
6. Click **Apply**.
7. Click **Download**.
8. **Call Log (csv)** is selected by default. Select what needs to be downloaded: **Call Log** or **Recorded Calls** or **both**. If you select **Recorded Calls (mp3)**, all call recordings will be downloaded. Click **Download** to save the file on your computer.

Note: If the Background Call Log feature is disabled, you will not be able to exit from the current window until the download gets completed. If the Backlog Call Log feature is enabled, a pop-up window will advise that your download has started and may take a while depending on the size of the file and internet connection. Click **OK** to close it.

The screenshot displays the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing, and More. The 'Reports' menu is expanded, showing options for Call Log, Meetings Reports, and Analytics. A search bar and filters for 'Last 7 days' and 'Call Direction' are visible. A table of call logs is shown with columns for Type, Phone Number, Name, Date / Time, and Recording. A 'Download' button is present. A 'Download Call Log' dialog box is open, showing a warning message and checkboxes for 'Call Log (csv)' and 'Recorded Calls (mp3)'. The 'Download' button is highlighted in the dialog.

1. Reports menu
2. Call Log option
3. Search bar
4. Call Direction filter
5. Select Date button
6. Download button
7. Download button in dialog
8. Download button in dialog

Download Call Log

Only the content listed below 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:

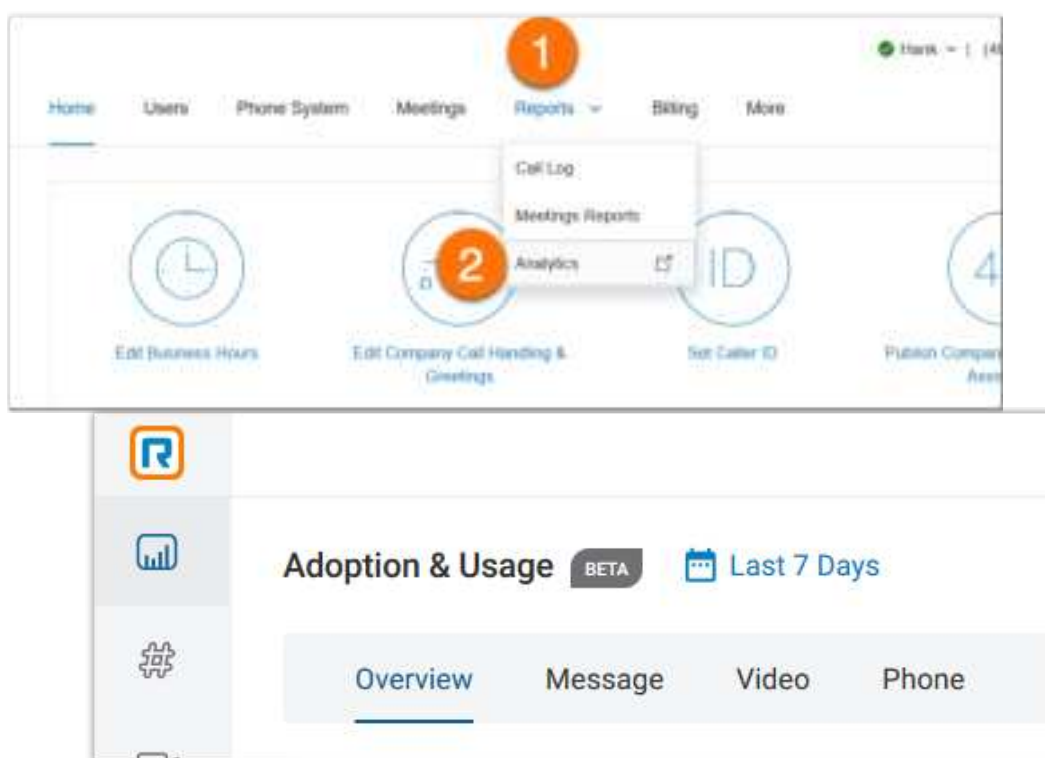
- if, and how, RingCentral products are being used (at the organizational level or across sites and departments)
- determining the power users
- trends and patterns of usage
- who are the low users/non-users
- which locations/departments could benefit from a training session
- user preferences such as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

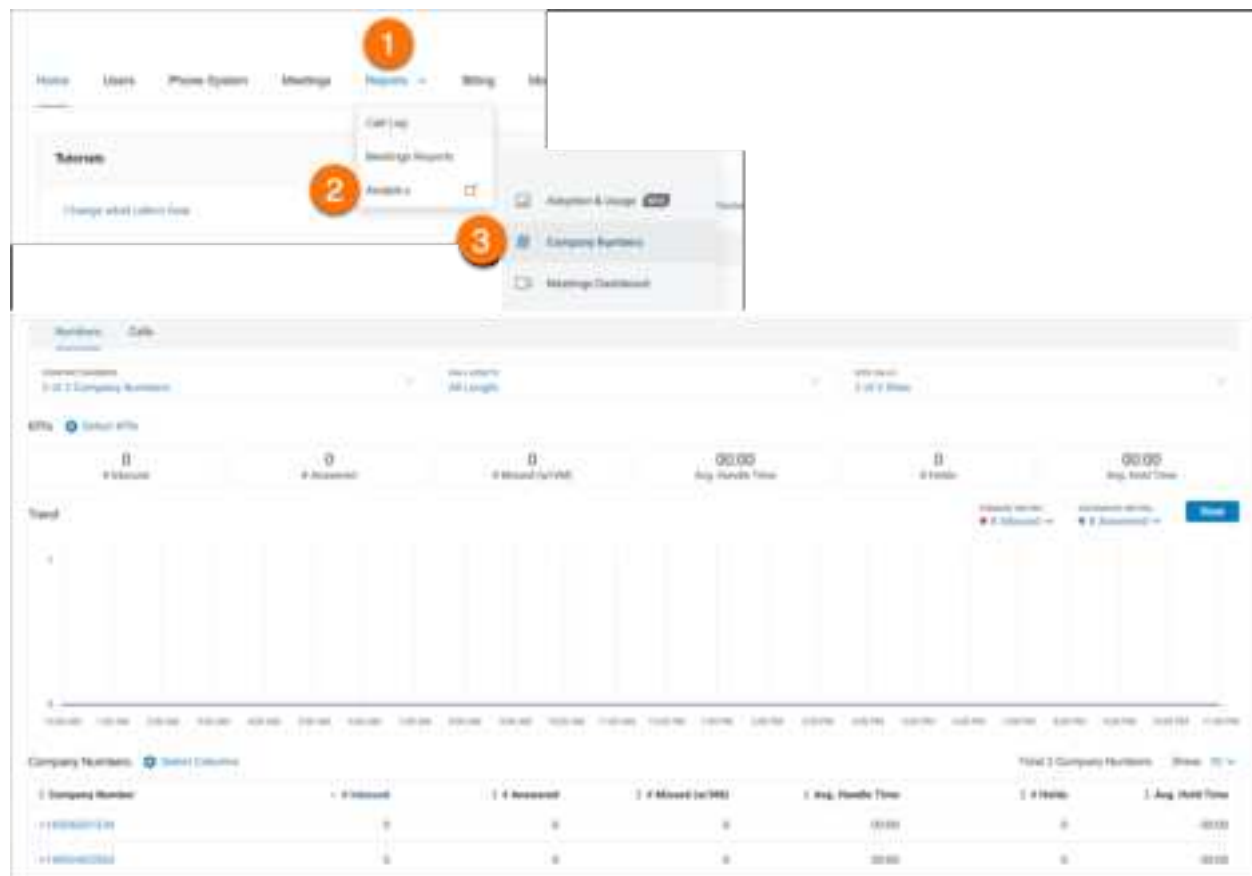
The Analytics Portal can generate a report using Company Numbers. There are also a number of Key Performance Indicators (KPIs) available for this report.

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

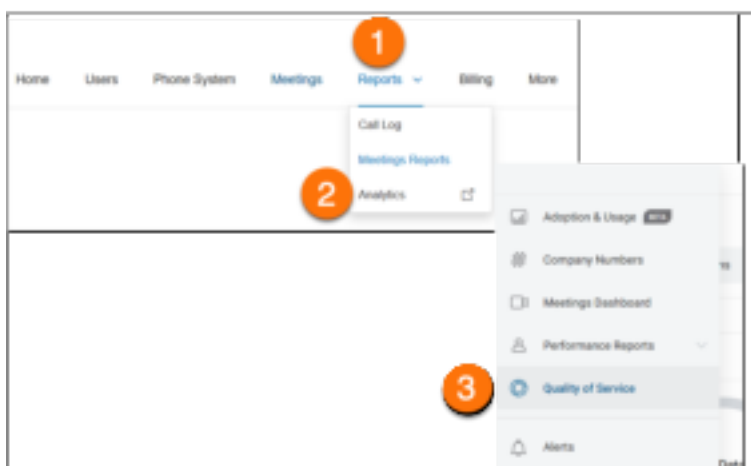
The Quality of Service reports provide near real-time information on the global health of the account and RingCentral Video and allows for proactive monitoring and reactive troubleshooting of potential issues. It gives you the ability to anticipate and diagnose call quality issues impacting your users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

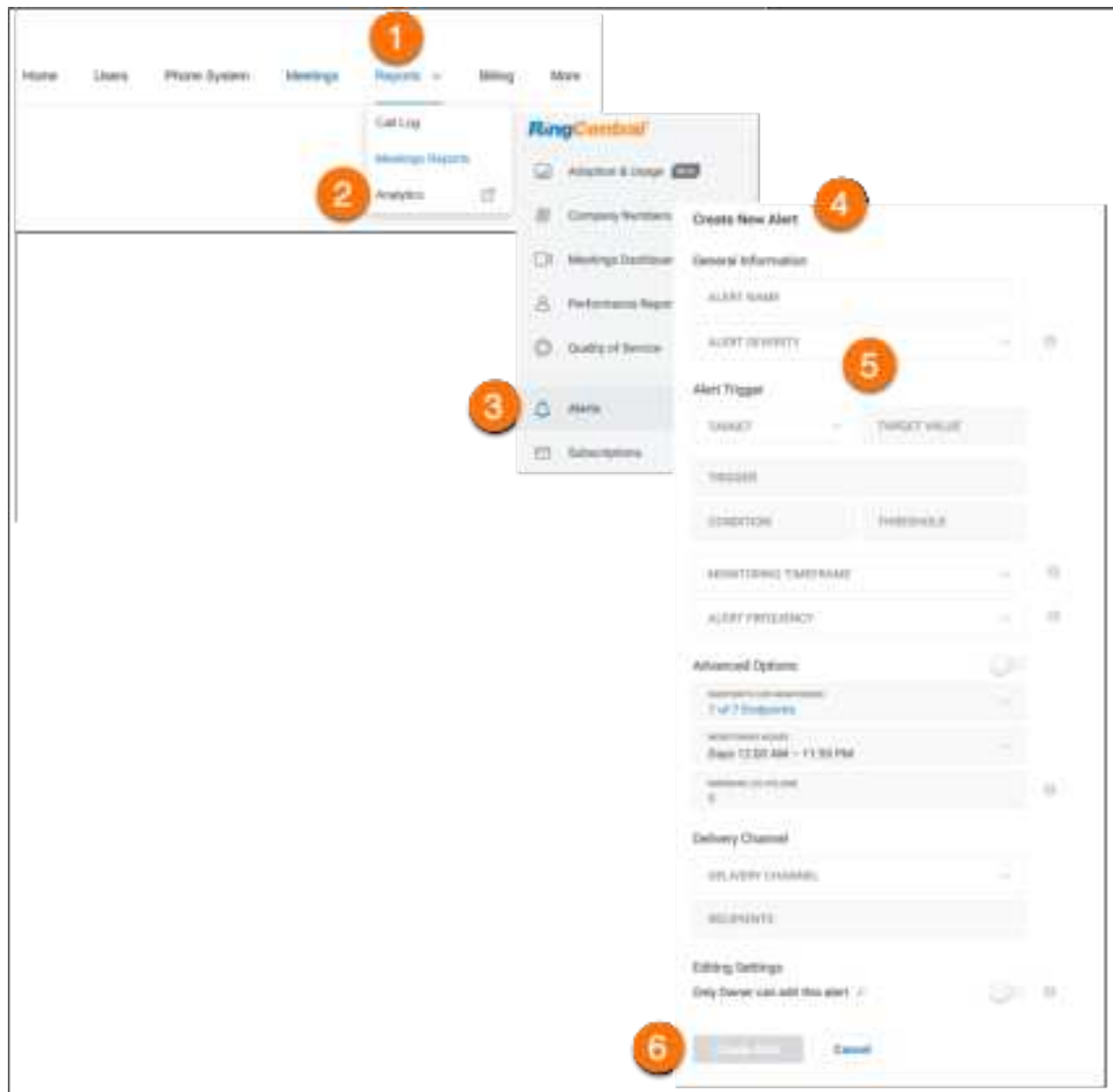
The RingCentral Analytics Portal allows you to create alerts based on your analytics data.

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**.



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:

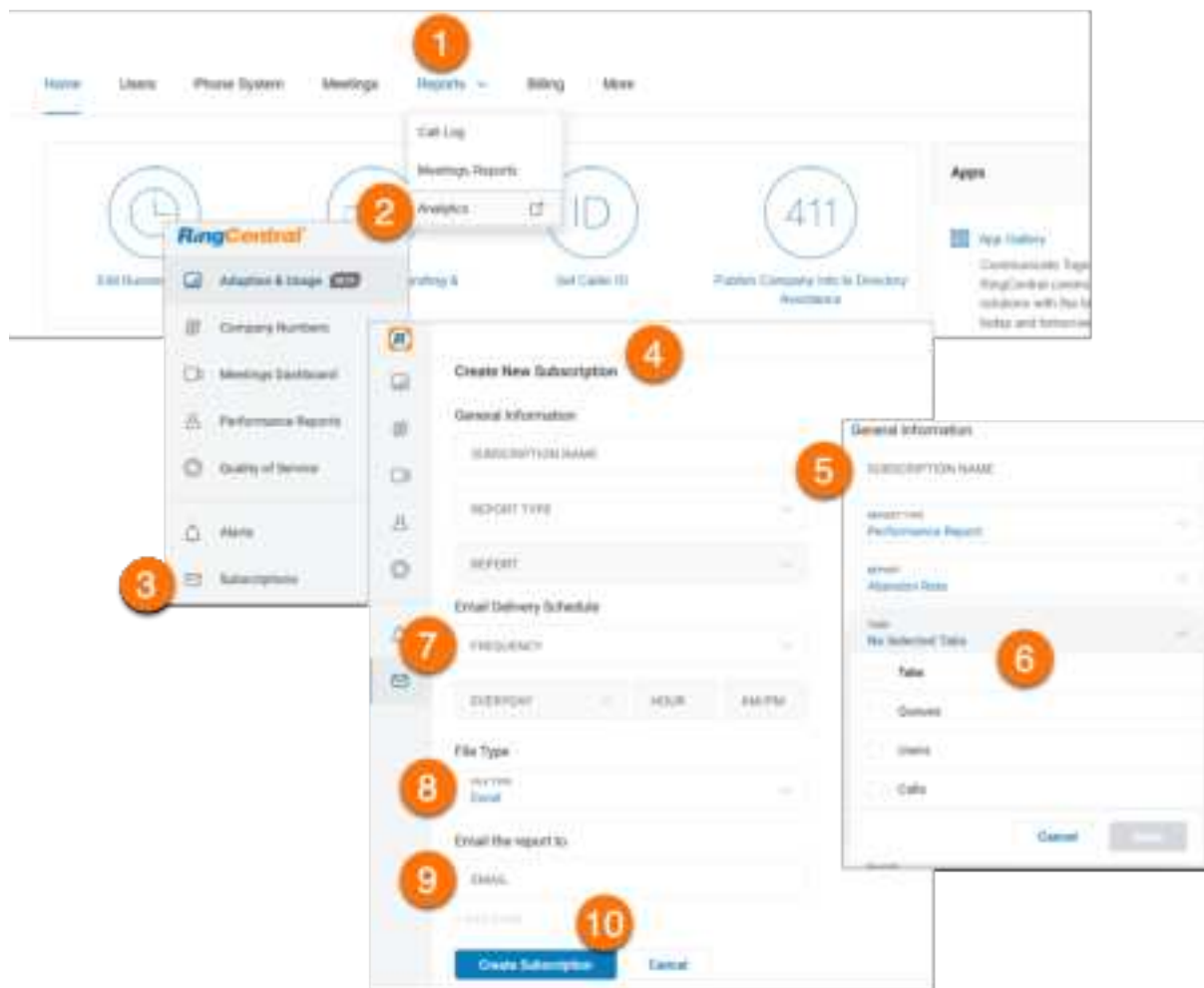
1. Click the **Reports** tab from the **Admin Portal**.
2. Click **Analytics**.
3. Click **Performance Reports**, then select **Queues**.
4. Click **Select KPIs**.
5. Tick the box for **# Abandon (Hold)**
6. Click **Done**.
7. Click **Save** in the upper right.
8. Enter a report name.
9. Click **Save**.

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.



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 (active), 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:

- Service Plan:** Displays "RingCentral Premium" with a "Change" link and a "Cancel" button. Below this, it shows "Billing Cycle: 11/28/2025 - 12/27/2025" and "Billing Plan: Monthly" with a "Change" link.
- General Usage:** Shows "Current Plan Usage: 10 minutes / Unlimited", "Post B2B Usage: View Log", and "Mobile Users: View History". A "View All Usage Detail" link is also present.
- Credits:** Displays "Available Account Credits: \$0.00", "Pending Credits: \$0.00", and "Free Service Credit: \$0.00".
- Auto-Purchase:** Shows "Calling Credit Package: \$20.00" (dependent on STD Plan activation at \$0.10 per min) and "API credits: \$0.00". A "Change" link is available.
- Payment Method:** Displays "Payment Type: Credit Card", "Card Number: XXXX XXXX XXXX XXXX", "Card Type: Visa", and "Expiration Date: 12/2022". A "View Detail" link is present.
- Services:** Shows "Monthly Charges: \$723.87/month", "Next Billing Date: 12/28/2025", "Outstanding Charges: \$723.87", and "Billing Date: 12/28/2025". A "View Details" link is available.
- Billing History:** A table showing recent billing events:

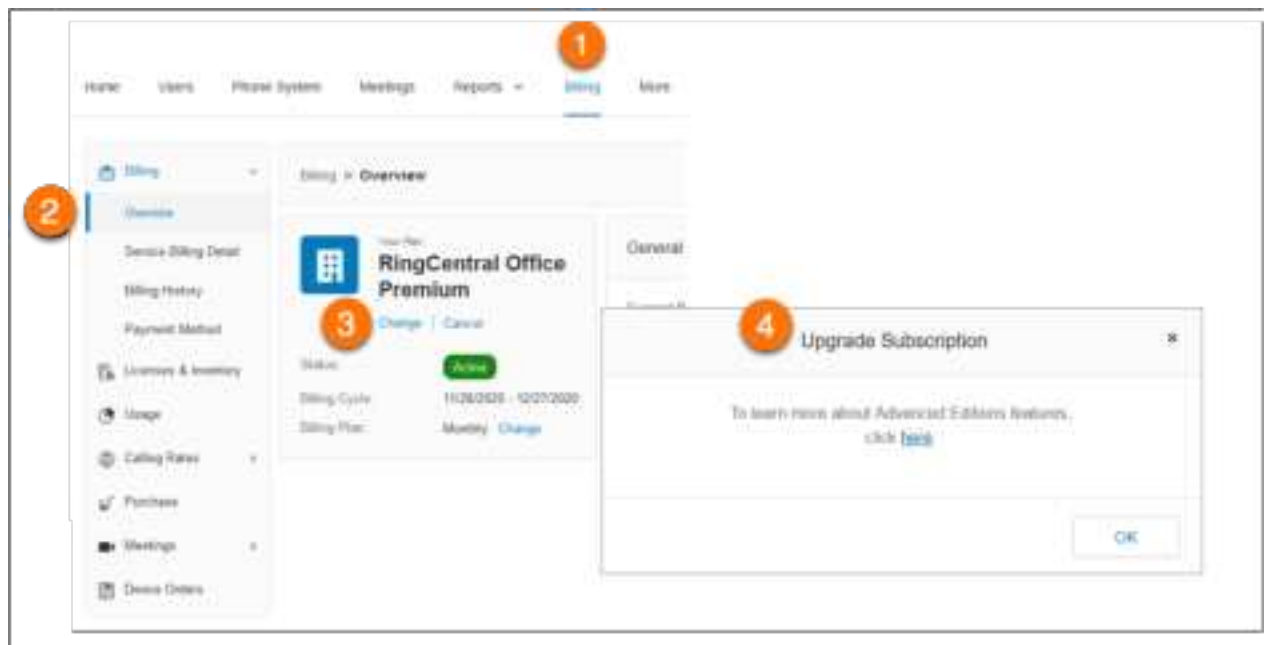
Date	Reference #	Description	Amount	Status
11/28/2025	2025112802	Renewing Rate	\$204.80	Paid in Full
11/28/2025	2025112802	Change Order	\$0.74	Paid in Full
11/28/2025	11/28/2025	Accounting Rate	\$288.37	Paid in Full

A "View Full Billing History" link is located at the bottom right of the Billing History section.

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's Billing Overview page. 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 lists various billing-related options. The main content area is divided into several sections: Overview, General Usage, Credits, Services, Auto-Purchase, and Payment Method. The Auto-Purchase section is highlighted with a red circle 2 and contains a 'Change' link. A modal window titled 'Auto-Purchase' is open, showing a description of the feature and two available Calling Credits Packages. The first package is \$100.00 (equivalent to 100 Plan minutes at 4¢) and the second is \$100.00 (equivalent to 2,500 Plan minutes at 4¢). The modal is highlighted with a red circle 3. At the bottom of the modal, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red circle 4.

Billing Overview

RingCentral Premium

Status: **Active**

Billing Cycle: 10/06/2020 - 03/07/2021

Billing Plan: Annual Change

Services View Details

Annual Charges: \$8,817.48/year

Next Billing Date: 10/06/2021

Upcoming Charges: **\$8,817.48** (Plan and Taxes included)

Billing Date: 10/06/2021

General Usage

Current Plan Usage: 3 minutes (1 minute)

Paid SMS Usage: View List

Mobile Usage: 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: \$100.00 (equivalent to 100 Plan minutes at 4¢ or 2,500 Plan minutes at 4¢)

Payment Method

Payment Type: Credit Card

Card Number: XXXX XXXX XXXX XXXX

Card Type: Visa

Expiration Date: 03/2020

[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

☒ \$100.00 (equivalent to 100 Plan minutes at 4¢)

☐ \$100.00 (equivalent to 2,500 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 (1), and More. The left sidebar contains links for Billing (2), Usage, Calling Rates (3), Outbound Rates (3), Inbound Rates, Premium Rates, Meetings, and Device Orders. The main content area displays the 'Outbound Rates' section (4), which includes a search bar (5) and a table of rates (6).

Status	Calls to	Type	Prefix	Call Rate	SMS Rate	Actions
✓ Enable	Algeria	Mobile	007	30¢	15¢	...
✓ Enable	Algeria	Regular	03	20¢	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 shows the RingCentral Admin Portal interface. At the top, the 'Billing' tab is selected in the navigation bar (1). On the left sidebar, 'Billing History' is highlighted (2). The main content area displays a table of billing transactions. The table has the following columns: Date, Reference #, Description, Amount, Payment Method, Status, and File. The first row shows a transaction on 07/01/2020 with Reference # 000700001, Description 'Change Order', Amount '\$204.21', Payment Method 'Visa (1111)', Status 'Paid in Full', and a 'View' link (3) in the File column. The table also includes a search bar and a 'Reset' button at the top.

Date	Reference #	Description	Amount	Payment Method	Status	File
07/01/2020	000700001	Change Order	\$204.21	Visa (1111)	Paid in Full	View
07/01/2020	000801002	Change Order	\$200.00	Visa (1111)	Paid in Full	View
07/01/2020	000902003	Change Order	\$41.17	Visa (1111)	Paid in Full	View
07/01/2020	410010001	Recurring State	\$10,276.00	Visa (1111)	Paid in Full	View

Viewing your payment method information

The Payment Method contains the credit card information attached to the RingCentral account.

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Payment Method**.
3. View your **Payment Information** and **Billing Address**.
4. Click **Edit**.
5. Edit your card details and billing address.
6. Click **Save**.

The screenshot displays the RingCentral Admin Portal interface. At the top, a navigation bar includes links for Home, Users, Phone System, Meetings, Reports, and Billing (highlighted with a blue underline and a red circle labeled '1'). A dropdown menu for Billing is open on the left, showing options like Overview, Service Billing Detail, Billing History, Payment Method (highlighted with a red circle labeled '2'), Usage, Calling Rates, Meetings, and Device Orders. The main content area is titled 'Billing > Payment Method' and features a '+ Add backup credit card' button. The 'Payment Information' section (labeled with a red circle '3') contains fields for Card Number (masked with XXXX.XXXX.XXXX.1111 and a 'View' link), Expiration Date (masked as MM/YY), and a 'View' link. An 'Edit' button (labeled with a red circle '4') is located to the right of the Payment Information section. Below this, the 'Billing Address' section contains fields for First Name, Last Name, Contact Phone, Contact Email, Country, Street Address, United States, Additional address (Optional), City, Demoted, State/Province, and Zip Code (masked as 94000-XXXX).

Licenses & Inventory

The Licenses & Inventory tab provides an overview of licenses and devices on your account in one place. You can filter by product category, cost center, and site.

To access Licences & Inventory:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Licenses & Inventory** to display a list that shows Product Name, Total, In-Use, Available, and Actions.
3. In the **Actions** column, click the dropdown arrow to show additional details.

The screenshot displays the RingCentral Admin Portal interface. At the top, the 'Billing' tab is selected in the navigation bar. On the left sidebar, 'Licenses & Inventory' is highlighted. The main content area shows a table of licenses and devices. The table has columns for Product Name, Total, In-Use, Available, and Actions. The following table represents the data shown in the screenshot:

Product Name	Total	In-Use	Available	Actions
Office Licenses	9	9	0	⌵
Desktop: Digital Line Unassigned	9	9	0	
Additional Local Numbers	4	4	0	⌵
Desktop:	4	4	0	
Desktop Phones	17	16	1	⌵
Cisco IP41 Digital Business Phone Purchased	1	1	0	
Cisco 8861 Digital Color Business Phone with 1 Speaker Module Purchased	1	1	0	
Cisco 8861 Digital Color Business Phone Purchased	1	1	0	
Common Phone	9	9	0	
Phone:	1	1	0	
International Calling Cards: Business	1			

Managing licenses

You can view, upgrade, and downgrade licenses and devices of users in your company's RingCentral account.

To view your users' active licenses:

1. Click the **Users** tab from the **Admin Portal**.
2. Click **Users with Extensions**.
3. Hover on the user you want to manage then select the license under the Licenses column.
4. This will open the license details, including the License name and quantity.

To update your users' licenses:

1. Click the **Users** tab from the **Admin Portal**.
2. Click **Users with Extensions**.
3. Hover on the user you want to manage, then click the more button at far right.
4. Click **Edit licenses** and select the license you want for the user. You can also select Add-on licenses if applicable to the license you are selecting.
Note: You can only upgrade a user to an available license in your inventory. If you don't have available licenses, you will need to purchase a new license.
5. Click **Update**.

Note: The license of a downgraded user will be placed in the license inventory for future use.

Viewing your usage

The Usage tab includes your total used plan minutes for the current billing cycle, SMS log, mobile users, available included credits for your account, international calling credits, and purchased calling credits.

To view your Usage:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Usage**.
3. Under **General Usage**, the **Current Plan Usage** shows how many minutes you have used on your account's Unlimited Usage.
4. Click **View Log** for **Paid SMS Usage** to filter and display the SMS logs of the account.
5. **Calling Credits** shows the remaining minutes on your account. The number of minutes depends on the type of plan you have.
6. Click **View Rates** on **Purchased Calling Credits** to show the available purchased calling credits on your account.



Viewing mobile user history

A virtual extension is a user extension without an assigned digital line. Virtual extensions forward incoming calls to mobile phones, extensions, or other external numbers and allow for limited outbound dialing. It becomes a Mobile User extension if it makes or receives ten or more calls in a given month (billing cycle).

To view the mobile users in your account:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Usage**.
3. Click **View History** on **Mobile Users**.
4. Review the page for the number of mobile users.
5. Filter your view and click **Apply**.
6. View the **Renewal Period**, **Name**, **Extension**, and **Number of External Calls**.
7. Click **Done**.

The screenshot displays the RingCentral Admin Guide interface for the Billing section. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing (highlighted), and More. A sidebar on the left contains links for Billing, Usage (highlighted), Calling Status, Meetings, and Device Orders. The main content area shows the Usage section with a sub-menu for General Usage, Current Plan Usage, and Post-SMS Usage. The Mobile Users History report is displayed, featuring a filter by Billing period (Current) and a table with columns: Renewal Period, Name, Extension, and Number of External Calls. The table is currently empty. At the bottom, there is a section for generating a report, including a text input field and a Send button.

1. Billing

2. Usage

3. General Usage

4. Current Plan Usage

5. Post-SMS Usage

6. Mobile Users History

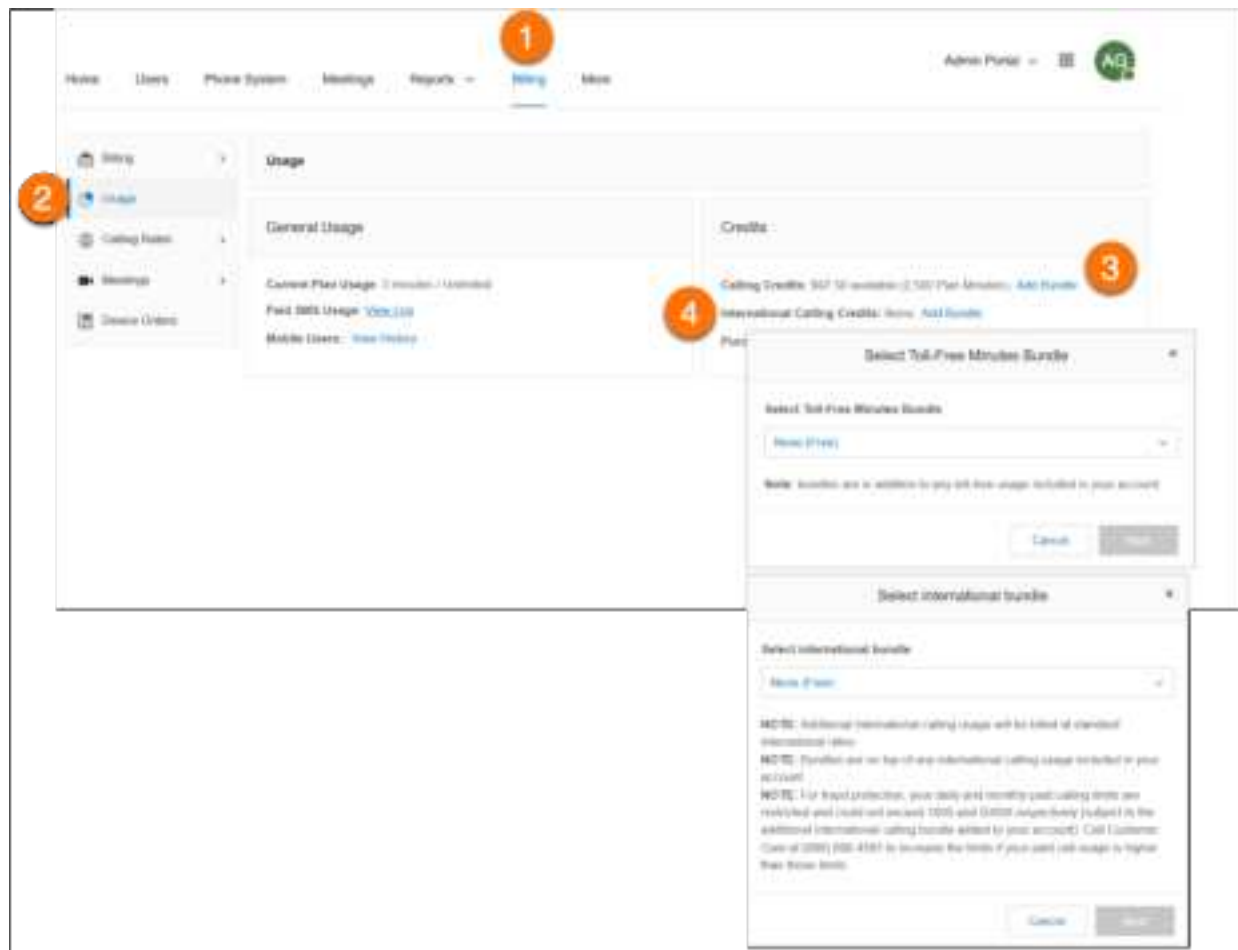
7. Send

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.

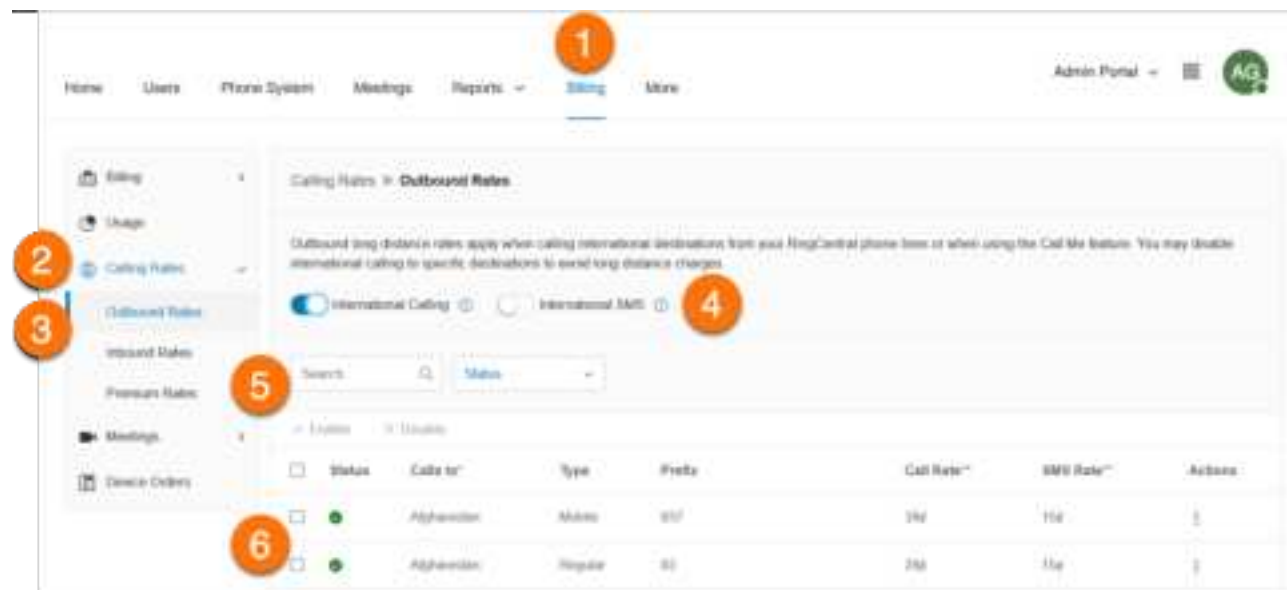


Managing Calling Rates

The Calling Rates tab under Billing contains international calling rates and premium domestic rates.

Enabling international calling and SMS

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Calling Rates**.
3. Click **Outbound Rates**.
4. Toggle on the switches for **International Calling** and **International SMS**.
5. You can search for the country to view the call rate and SMS rate.
6. To disable a specific country, do one of the following:
 - a. Tick the box beside the country, click **Disable**, and click Yes on the **Confirmation** window.
 - b. Click the **More** kebab icon at the far right of the country under **Actions**, click **Disable**, and click **Yes** on the **Confirmation** window.



Viewing inbound rates

The Inbound Rates tab shows the rates when you receive calls to your RingCentral local or toll-free number from specific countries.

To view the Inbound Rates:

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Calling Rates**.
3. Click **Inbound Rates**.

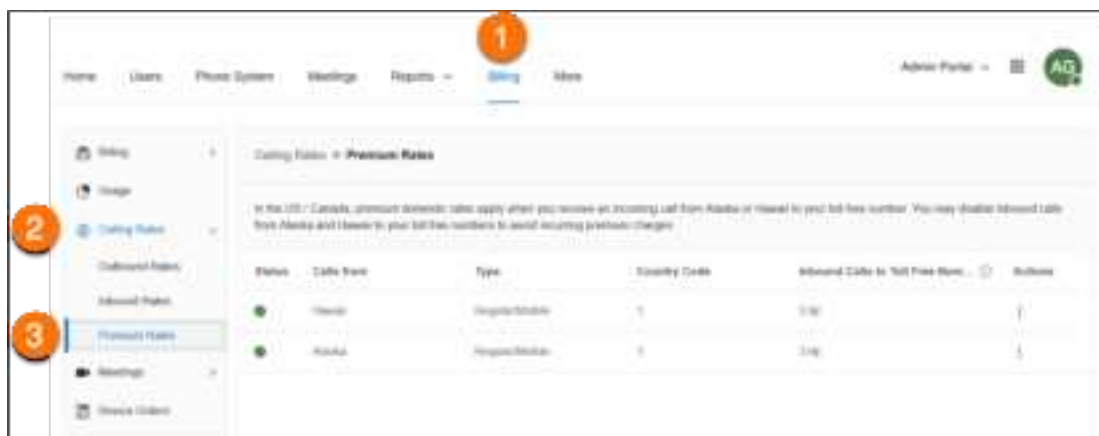


Viewing premium rates

The Premium Rates tab shows the premium domestic rates.

To view the Premium Rates:

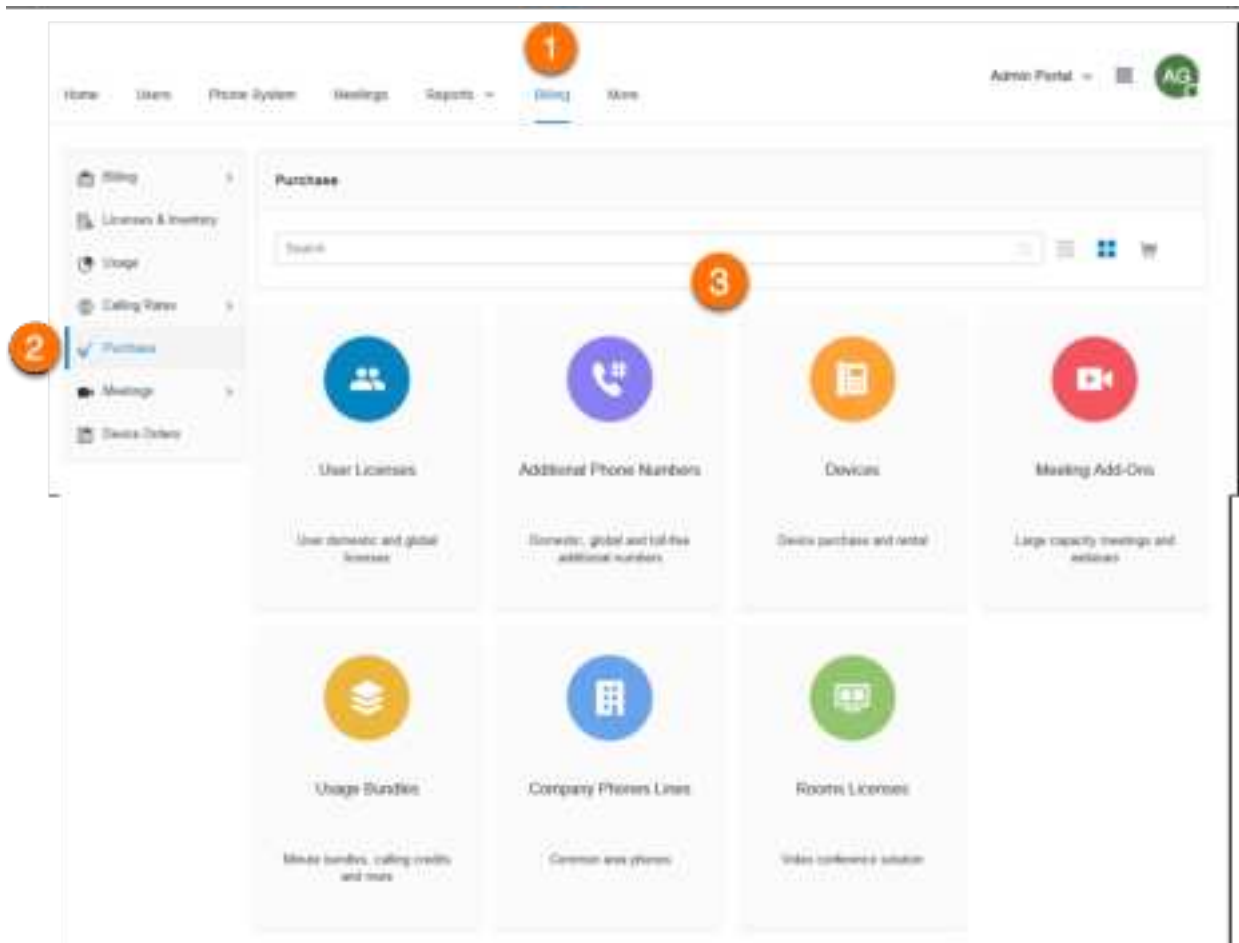
1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Calling Rates**.
3. Click **Premium Rates**.



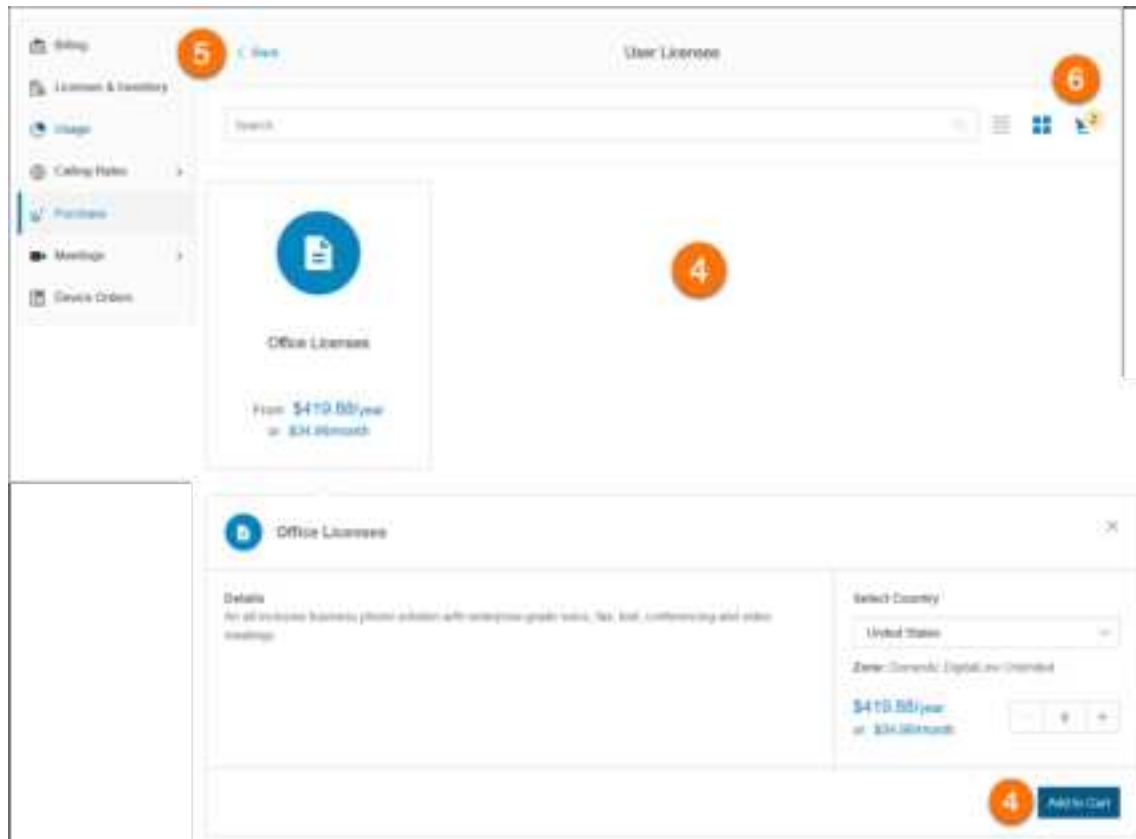
Managing Purchases in the Billing tab

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.

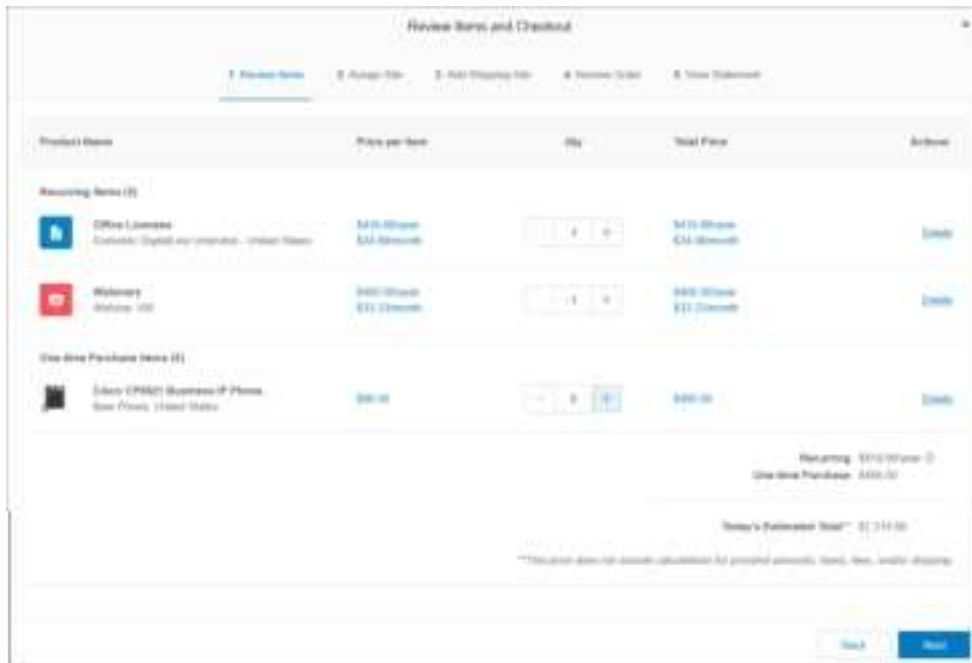


Using the Shopping cart to check out

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.



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

Select Site

Select Site

Assign to Selected

Assign Site to Items (5)

<input type="checkbox"/>	Product Name	Site	Qty	Actions
<input type="checkbox"/>	 Cisco CP6821 Business IP Phone New - United States	Select Site	5	Split

Back

Next

Add Shipping Info

Choose a ship-to address from the **Select Shipping Address** dropdown. Choose **Edit** to modify an existing address or **New** to add a new address. In the **Attention to** field, add a recipient name. Choose a shipping method from the **Select Shipping Method** dropdown. Check the box to the left of the entry you want to assign. Choose **Split** in the **Actions** column to allocate purchases to more than one recipient. Click **Next**.

Add Shipping Info

✓ Review Items

✓ Assign Site

3 Add Shipping Info

4 Review Order

5 View Statement

Auto-assign the shipping address based on Site address. Attention to and Ground Shipping will be the default.

Auto Assign

Select Shipping Address

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 (5)

<input type="checkbox"/>	Product Name	Qty	Actions
<input checked="" type="checkbox"/>	 Cisco CP6821 Business IP Phone New - United States	4	Split
<input type="checkbox"/>	 Cisco CP6821 Business IP Phone New - United States	<div>− 1 +</div>	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 Sale
✓ 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 CP6621 Business IP Phone	\$89.00	5	\$495.00
(One time charge)	Shipping & Handling Fees: US - Ground	\$6.05	5	\$30.25
Charges after Discounts and Prorates:				\$956.78
Taxes				Amount
> State and local taxes and fees				\$53.04
Compliance and Administrative Cost Recovery Fee				\$48.00
Compliance and Administrative Cost Recovery Fee - Prorate Adjustment				(\$38.43)
e911 Service Fee				\$12.00
e911 Service Fee - Prorate Adjustment				(\$9.61)
EUSE (VoIP)				\$4.00
Taxes after Discounts and Prorates:				\$69.09
Total charges after discounts and prorates:				\$688.78
Total Taxes and Fees:				\$69.09
Sub-total:				\$757.87
Total Charged to Credit Card:				\$757.87

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

☒ I acknowledge that I have read this information and understand the itemized charges listed above. I authorize the total amount of **\$757.87** to be charged to my credit card ending in ["1111"]. I further authorize the monthly recurring charges of \$819.88* beginning on 02/27/2021 and continuing until canceled, which is in addition to my regular charges.

* Prices do not include taxes, fees or discounts

Back
Next

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](#)
[& View Statement](#)

Account Number: (409) 240-2563
Service Plan: RingCentral Office Premium
Statement Date: 12/16/2020
Paid By: Visa[1111]
Reference#: 2444893002

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

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

Period	Charges and credits	Unit Price	Quantity	Amount
02/26/2020 - 02/27/2021	DigitalLine Unlimited (new purchase)	\$419.88	1	\$419.88
02/26/2020 - 12/16/2020	DigitalLine Unlimited - Prorate Adjustment	(\$336.13)	1	(\$336.13)
02/26/2020 - 02/27/2021	RingCentral Webinar 100 (new purchase)	\$400.00	1	\$400.00
02/26/2020 - 12/16/2020	RingCentral Webinar 100 - Prorate Adjustment	(\$320.22)	1	(\$320.22)
(One time charge)	Cisco CP8821 Business IP Phone	\$99.00	5	\$495.00
(One time charge)	Shipping & Handling Fees: US - Ground	\$6.05	5	\$30.25
Charges after Discounts and Prorates:				\$688.78
Taxes				Amount
> State and local taxes and fees				\$53.94
Compliance and Administrative Cost Recovery Fee				\$48.00
Compliance and Administrative Cost Recovery Fee - Prorate Adjustment				(\$38.43)
e911 Service Fee				\$12.00
e911 Service Fee - Prorate Adjustment				(\$9.61)
EUSE (MOP)				\$4.00
Taxes after Discounts and Prorates:				\$69.09
Total charges after discounts and prorates:				\$688.78
Total Taxes and Fees:				\$69.09
Sub-total:				\$757.87
Total Charged to Credit Card:				\$757.87

Print
Done

Managing meetings in the Billing tab

The Meetings section allows you to manage RingCentral Video, including managing licenses, downloading software, adding and viewing rooms, and managing settings.

RingCentral Rooms licenses

RingCentral Rooms offers a convenient way to start, join, and control RingCentral Video meetings in a conference room from an iPad or Poly controller. Use RingCentral Rooms to start or join RingCentral Video meetings which are initiated from different endpoints. RingCentral Rooms supports up to 200 participants in a single meeting.

RingCentral Rooms requires a RingCentral MVP subscription and add-on licenses for the RingCentral Rooms conference rooms.

Adding a Rooms license

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Meetings**.
3. Click **Rooms**.
4. Click **Add Licenses**.
5. Enter the number of licenses.
6. Click **Next**.
7. Review the charges. Tick the acknowledge checkbox to confirm your order.
8. Click **Next**.

Note: You can add a maximum of 50 RingCentral Rooms licenses at a time. If you plan to purchase more than 50 licenses in bulk, you must break the purchase into several orders.

Managing device orders

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

An authorized agent can extend the deadline up to 9 hours from Admin Web after your initial order placement. You can edit those orders during this hold period. An order can only be modified a single time. After which, it is submitted immediately to the distributor for processing.

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

The screenshot displays the RingCentral Admin Portal interface for managing device orders. 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 contains links for Billing, Usage, Calling Rates, Meetings, and Device Orders (highlighted with a red circle 2). The main content area shows the 'Device Orders' section with a search bar and a table of pending orders. One order is listed with Order Number 102509337, Order Placed on 08/11/2020 at 10:01 AM, Device Quantity 4, Status Pending, and an 'Edit Order' button (highlighted with a red circle 3). The 'Edit Order' modal window is open, showing the order details and a table of charges/credits. The modal includes a warning message: 'Please note: Only phone type and shipping can be modified for an existing order. To make any other changes, please call support (888) 888-8881.' The modal also displays the original order details and a table of new charges/credits. The summary table at the bottom shows the original phone order charges and the new sub-total charges/credits.

Quantity	Area Code	Phone	Original Charges*
4	(415)	Protonix V10 3.5" Optical Ethernet Phone	\$175.00 (4) = \$700.00 - one time

Quantity	Area Code	Phone	New Charges/Credits*
4	(415)	Protonix V10 3.5" Optical Ethernet Phone	\$175.00 (4) = \$700.00 - one time
2	(415)	Protonix V10 3.5" Optical Ethernet Phone	\$175.00 (2) = \$350.00 - one time

Original Phone Order Charges	Quantity	Sub-total*
One Time Charges	4	\$700.00
Shipping Fees		\$14.00
Recurring Charges	0	\$0.00
Total Paid*		\$714.00

Phone Order Charges/Credits (2)	Quantity	Sub-total*
One Time Charges/Credits	2	\$350.00
Credits from Original Order	(2)	(\$474.00)
Recurring Charges/Credits		
New Phone Month	0	\$0.00
Revised Credits from Original Order	(2)	(\$60.00)
New Sub-total Charges/Credits*		\$206.00

*Total charges do not include taxes, fees, penalties and discounts.

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 162019027

Shipping Groups (2)

Quantity	Destination	Shipping Method			
2	1400 Folsom Island Blvd, Ste 100, San Mateo, CA	USPS LND	View	Change Shipping	Delete
2	20 Davis St, Belmont, CA, 94002-5802	USPS LND	View	Change Shipping	Delete

Select shipping for the phones below:

Add to Shipping Group

Phone	Phone Number	Assigned To	Est.
All phones assigned to shipping group			

Original Phone Order Charges

One Time Charges	Quantity	Sub-total*
Phone(s)	4	\$0.00
Shipping Fees		\$21.00
Recurring Charges		
Phone Rental	0	\$0.00
Total Paid*		\$21.00

Phone Order Charges/Credits (2)

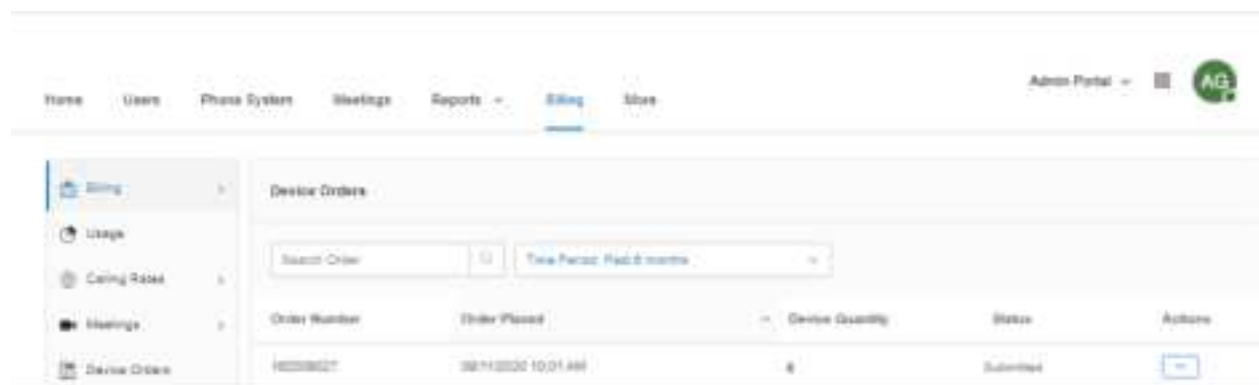
One Time Charges/Credits	Quantity	Sub-total
New Phone(s)	2	\$0.00
Credit from Original Order	(2)	(\$490.00)
New Shipping Fees		\$21.00
Activation Fees (Pay Original Order)		(\$21.00)
Recurring Charges/Credits		
New Phone Rental	0	\$0.00
Rental Credit from Original Order	(0)	(\$0.00)
New Sub-total Charges/Credits*		\$21.00

*Phone charges do not include taxes, fees, activation and discounts

Back Next

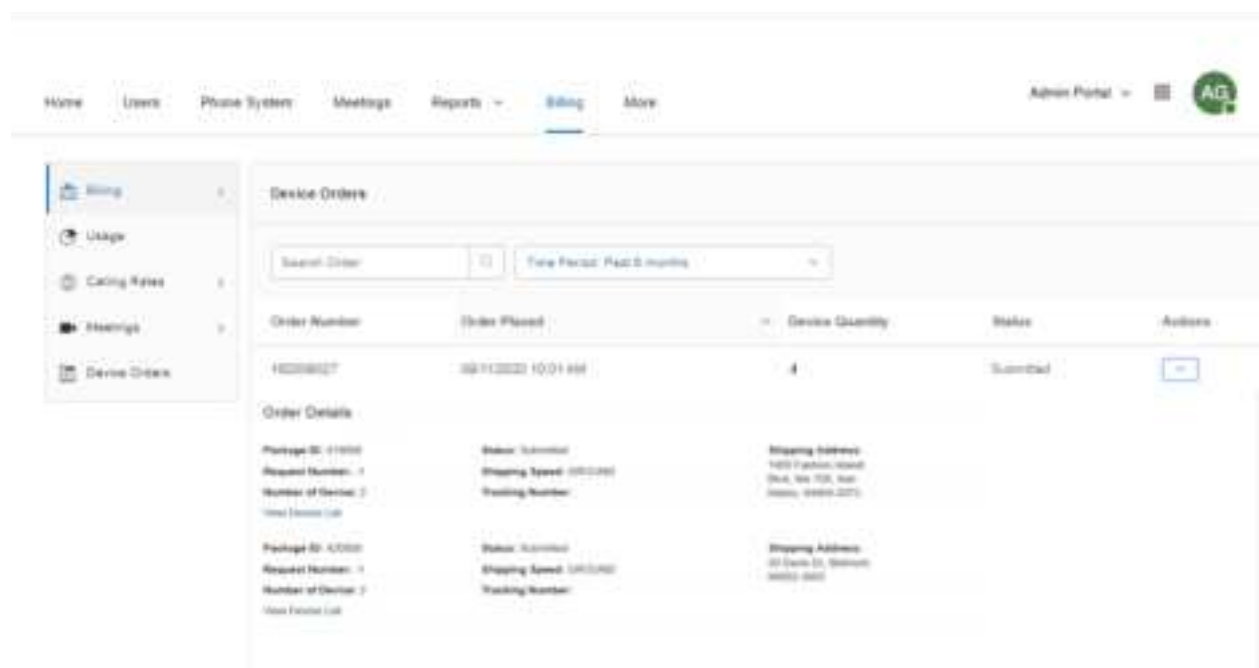
[illegible]

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



The screenshot shows the RingCentral Admin Portal interface. The top navigation bar includes links for Home, Users, Phone System, Meetings, Reports, Billing (highlighted), 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 Billing (selected), Usage, Calling Rates, Meetings, and Device Orders. The main content area is titled "Device Orders" and features a search bar and a "Time Period: Past 6 months" filter. Below this is a table with the following columns: Order Number, Order Placed, Device Quantity, Status, and Actions. A single row is displayed with the following data: Order Number 40000027, Order Placed 08/11/2022 10:01 AM, Device Quantity 4, Status Submitted, and an Actions button.

Order Number	Order Placed	Device Quantity	Status	Actions
40000027	08/11/2022 10:01 AM	4	Submitted	View Order



This screenshot shows the "View Order" page for the order with ID 40000027. The interface is consistent with the previous screenshot, showing the same navigation and sidebar. The main content area displays the "Device Orders" table with the same row. Below the table, the "Order Details" section is expanded, showing information for two packages. Each package entry includes the Package ID, Request Number, Number of Devices, and a link to "View Device List". The shipping details for each package are also listed, including the status (Submitted), shipping speed (USPS), and tracking number.

Package ID	Request Number	Number of Devices	View Device List
40000027	1	2	View Device List
40000027	1	2	View Device List

Shipping Address: 1000 Paddock Road, Suite 100, San Jose, CA 95128-2075

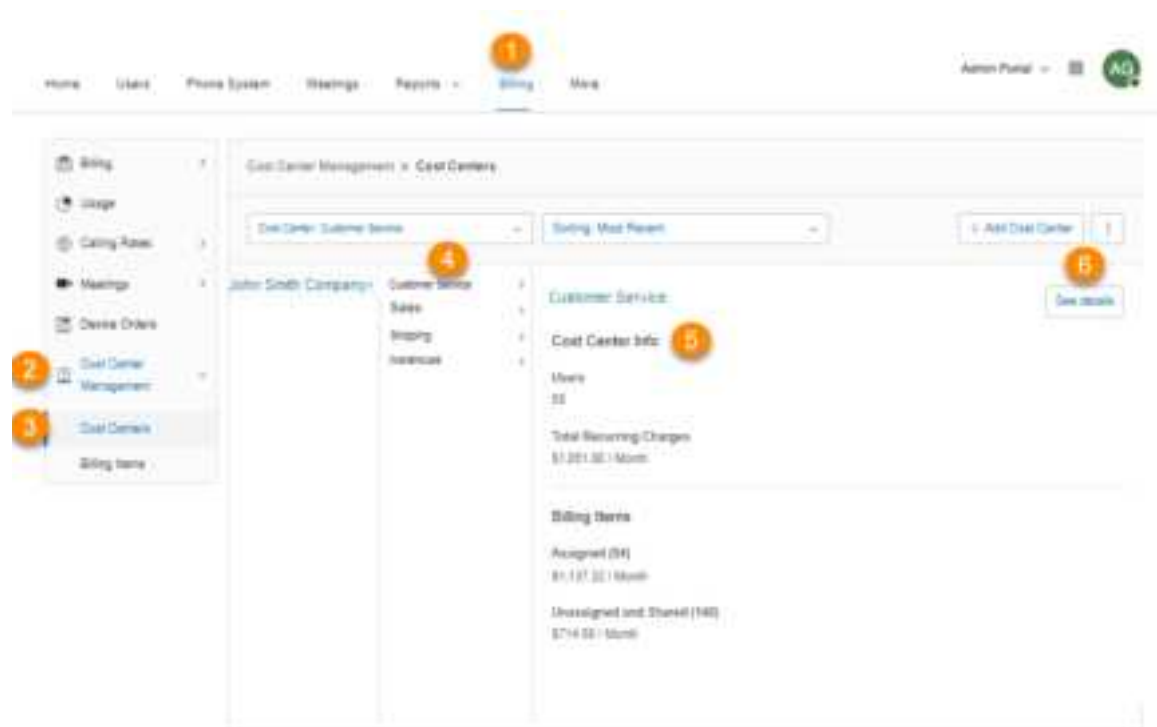
Shipping Address: 1000 Paddock Road, Suite 100, San Jose, CA 95128-2075

Using the Cost Center Management feature

The Cost Center Management feature allows you to manage and monitor expenses for groups or individuals. Administrators can assign purchases of RingCentral services to a department or an individual with cost center codes. Each transaction can be assigned to a specific cost center code that you have created. You can create cost center codes while you are in process or upload predefined codes.

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Cost Center Management**.
3. Click **Cost Centers**.
4. Select an existing **Cost Center Code**. If you do not have any cost center codes, see the next page on how to create one.
5. You will see the Cost Center's summary, which includes:
 - a. Number of users assigned to the Cost Center.
 - b. The Cost Center's total recurring charges per month.
 - c. Billing Items - Assigned: queue/user extensions and DigitalLines.
 - d. Billing Items - Unassigned and Shared: company numbers.
6. Click **See details** for the complete list of Billing Items.

Note: To enable the Cost Center Management feature, contact your RingCentral account manager.



Adding Cost Center codes

1. Click the **Billing** tab from the **Admin Portal**.
2. Click **Cost Center Management**.
3. Click **Add Cost Center**.
4. Enter your preferred **Name** and **Billing Code** (optional).
5. Click **Save**.

Note: Administrators can also add a Cost Center Code while processing a transaction. When the administrator is asked to assign a purchase to a Cost Center Code, there will be a button to **Add New Code** the administrator can click.

More

In the Admin Portal, the **More** menu lists many important features for your company's phone system.

- **Audit Trail** lets you find and capture changes made by users that affect system events, configuration, and user accounts.
- **Service Status** allows Users and Administrators to view any high level service impacting issues on the RingCentral platform with or without logging in.
- **Appearance** lets you add your company logo to your RingCentral online account. You can also link your company logo to your company's website for smoother navigation.
- **Directory Integration** allows you to automatically provision users from your Active Directory or G Suite corporate directory into RingCentral.
- **Multi-Site Settings** allows you to configure and manage your different office locations under one account.
- **Single Sign-On (SSO)** lets employees in a company access multiple applications with one set of credentials. RingCentral SSO supports the Kerberos network authentication service (on Windows), as well as integrates with Google SSO.
- **Session Timeout** lets you configure a session timeout for all users.
- **Hot Desk Session Timeout** specifies the time period when guest users will be logged out from phone endpoints, or allows you to configure no timeout.
- **Masked Numbers** setting hides certain information from Administrators for a subset of users in order to meet country-specific compliance requirements.
- **Trust Portal** allows customers to access RingCentral's security and compliance documents. It provides audit reports and compliance documentation to assist customers with their compliance, regulatory, and data protection diligence.
- **Archiver** lets you securely save your messages and recorded calls automatically and easily search the stored data at any time from within your SFTP or Dropbox cloud storage account to quickly retrieve the records.
- **App Gallery** is where you can discover application integrations that are commercially available, and where developers can showcase their integrations.
- **Developer Portal** is a place where you request access to the RingCentral Connect Platform.

Service console

Using the Audit Trail feature

The Audit Trail feature allows the Super Admin or a User assigned with a Billing Admin role to:

- Track the changes on the RingCentral account which can be used for auditing and/or troubleshooting.
- Generate the report with filter options.
- See changes made by other Administrators (applicable to organizations with multiple administrators who need a changelog in order to provide coordinated support).
- Detect failed logins and locked accounts.

Audit Trail captures changes to the following events:

Admin Level Changes:

- **System events:** Successful logins (Service Web only) and Failed login & Locked accounts due to bad passwords (all clients, plus integrations).
- **Phone System**
 - **Company Info:** Company Address, Directory Assistance, Caller ID Name.
 - **Phone numbers:** Company and assigned.
 - **Auto-Receptionist:** General settings.
 - **Phones & Devices:** User Phones, Common area phones, Paging devices, shared lines.
- **Users:**
 - **User list:** Users with extensions and unassigned extensions.
 - **Roles.**
- **Billing:** License purchases, license deletes, upgrades/downgrades.
- **Tools:**
 - **Account Settings:** Custom Fields and Outbound Call Prefix.

User/Extension level changes

- **Settings**
 - **User Name/Ext:** User Details (partial); Phones & Numbers (partial, add/delete number only); Screening, Greeting, & Hold Music; Call Handling & Forwarding, Messages.
 - **Outbound Calls/Faxes:** CallerID and Fax Settings.
 - **Notifications:** Messaging Notifications.

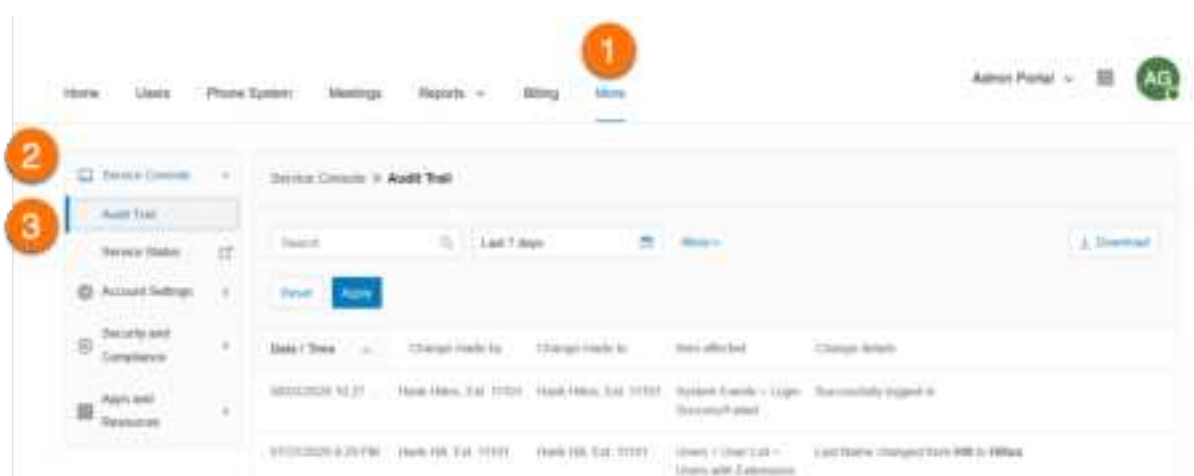
RingCentral app admin settings

- **Administrators:** Administrators added or removed (First Last, Ext.).

- **Company settings:** Enable phone features (on/off); Allow employees to add people (on/off); File sharing (service, on/off), for example Google Drive on/off, Evernote on/off, etc.; Allow Giphy sharing (max rating), for example, Max rating of PG-13.
- **Data Retention:** Policy set to N days.
- **Compliance exports:** Exports (on/off); Request/ download export enabled/disabled for UserName; Download requested by Name/ email.

Accessing the Audit Trail feature

1. Click the **More** tab from the **Admin Portal**.
2. Under **Service Console**, click **Audit Trail**.



Audit Trail report details

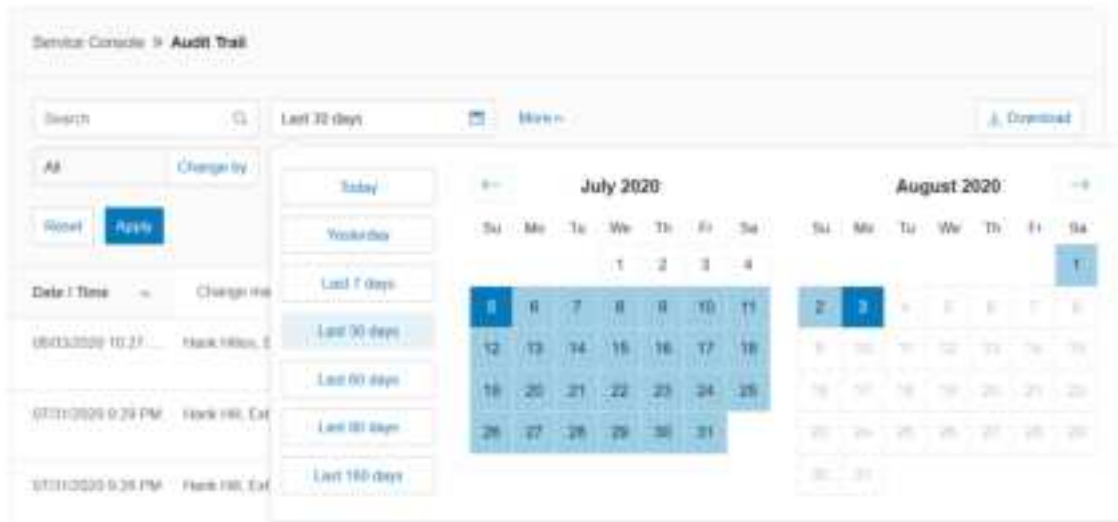
When a particular event is captured, these details are provided in the report:

- **Date/Time** - changes logged using Coordinated Universal Time (UTC) and displayed based on logged-in user's regional timezone setting.
- **Change made by** - person who made the change.
- **Role*** - permission level of the person who made the change.
- **Change made to** - indicates which item was changed.
- **Item affected** - indicates the configuration that was changed.
- **Change details** - description of the change.
- **Endpoint*** - application name.
- **IP Address*** - application IP address.

*Indicates these report fields are only available in a downloaded comma- delimited (CSV) log file.

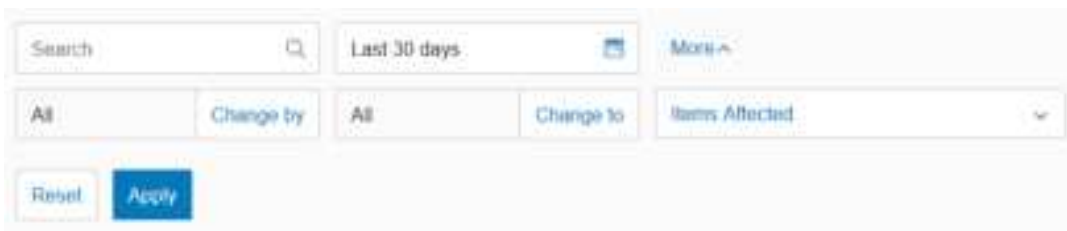
Search Capability

You can search records that provide report details by time periods: Today, Yesterday, Last 7 days, Last 30 days, Last 60 days, Last 90 days, and Last 180 days.



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**.

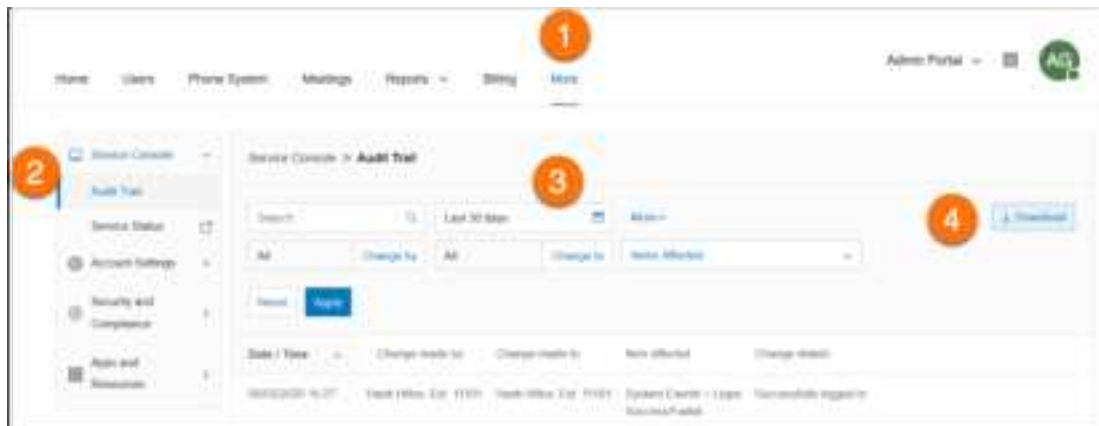
Downloading an Audit Trail report

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 MVP accounts and is enabled by default. To disable the feature, [Contact RingCentral Support](#).



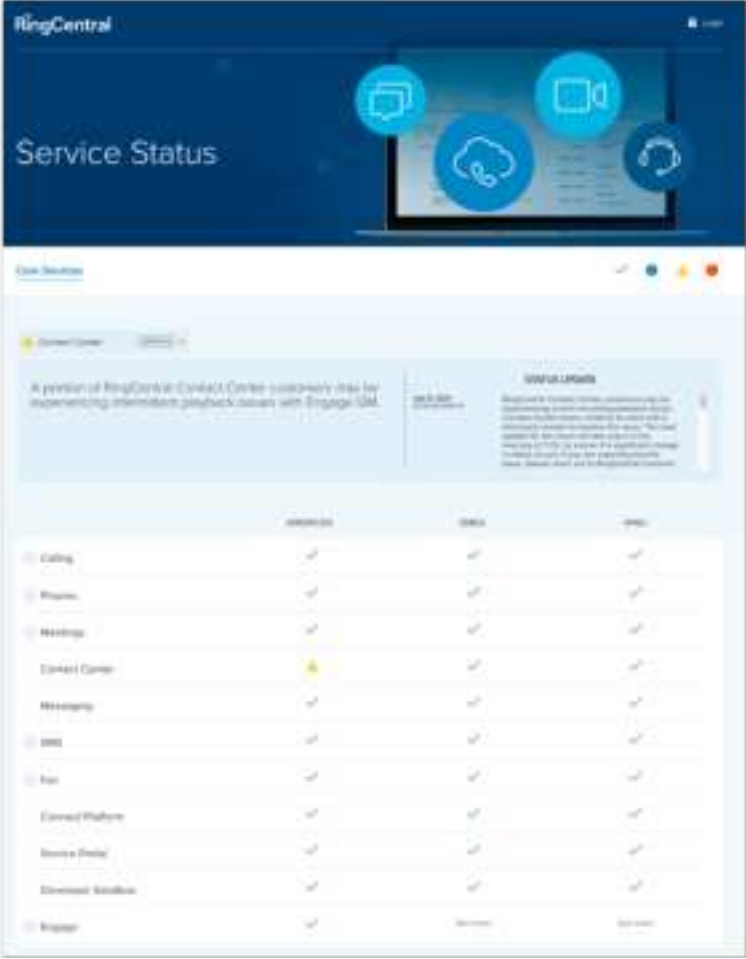
Service Status

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.



The image shows the RingCentral Service Status dashboard. At the top, there's a header with the RingCentral logo and a 'Service Status' title. Below the header, there's a section titled 'Check Services' with a 'Connect Center' button. A message states: 'A portion of RingCentral Contact Center customers may also be experiencing intermittent product issues with Engage360.' To the right, there's a 'STATUS UPDATE' section with a '2023-08-01' timestamp and a description of the issue. Below this, there's a table with columns: 'Service', 'Status', 'Impact', and 'Workaround'. The table lists various services and their current status.

Service	Status	Impact	Workaround
Calling	✓	✓	✓
Presence	✓	✓	✓
Meetings	✓	✓	✓
Contact Center	⚠	✓	✓
Workflows	✓	✓	✓
CRM	✓	✓	✓
Fax	✓	✓	✓
Contact Platform	✓	✓	✓
Device Profile	✓	✓	✓
Connectors/Integrations	✓	✓	✓
Engage360	✓	Severely	Not available

Account settings

Account linking

Account Linking is a solution that provides a set of features to support customers who are split across different accounts, and allows account users to find one another across accounts on all endpoints. Large customers may have this split because of a limit of number of users per account, or business needs for having different accounts or billing.

Accounts are linked into a federation that includes:

- The ability to create accounts in multiple tiers, allowing for a mix-and-match of certain feature sets
- A consolidated company directory
- Non-metered extension-to-extension and direct number dialing support in the federation

Before setting up Account Federation:

1. Contact RingCentral support to request access to the Account Federation feature. RingCentral support will help evaluate if your account qualifies for the feature.
2. The RingCentral support agent enables the Account Federation feature and adds your linked accounts within your online account.
3. Unique extensions in the federation are preferred. If extensions are not unique, the support agent may be able to update the extension numbers of the linked account for you by applying a template.
4. When the Account Federation setup is complete, all account users can find one another across accounts on all endpoints.

Note: Feature not available for all accounts. Contact RingCentral support to evaluate if your account qualifies for this feature.

Navigating the Appearance tab

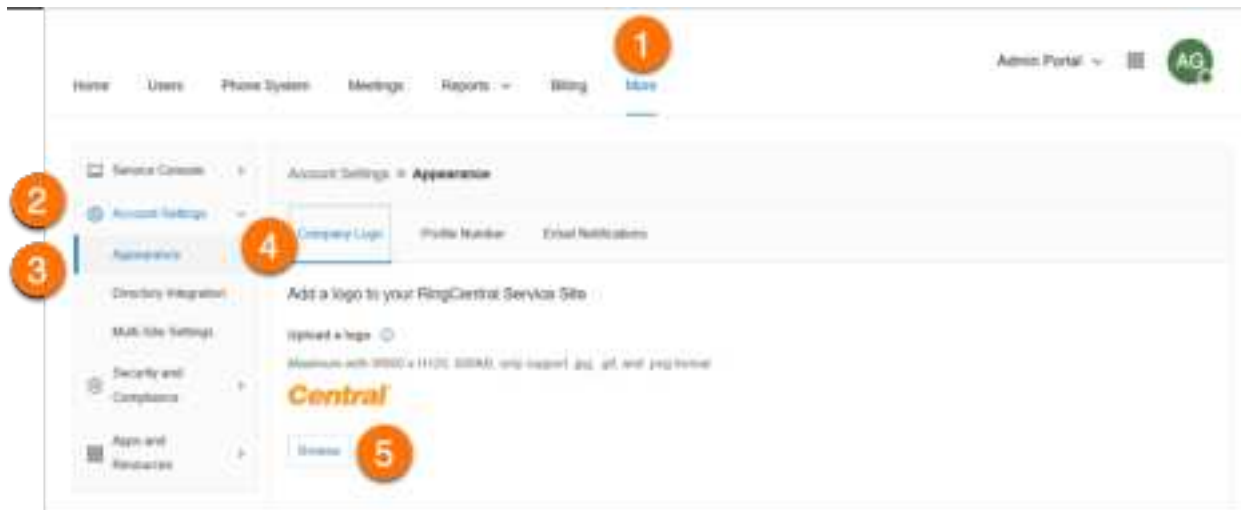
The Appearance tab allows you to add a company logo to your RingCentral account, change the phone numbers the users see in their online account profile, and customize the email notifications that you receive.

Company logo

The company logo will appear at the top-right corner of your online account once you log in. To upload and link an image:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Appearance**.
4. Click **Company Logo**.

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



Profile number

In the profile tab, administrators have the option to choose which numbers are displayed on their user's account page.

The number format may differ depending on the country code. If a user does not have a direct number, the main number and extension will be displayed. If a user has multiple numbers, the user can click on the drop-down arrow to view these numbers.

To select the numbers that users will see in their profile:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Appearance**.
4. Click **Profile Number**.
5. Select from the following options:
 - a. **Direct Number and Extension.**
 - b. **Direct Number.**
 - c. **Main Number and Extension.**
 - d. **Direct Number, Main Number, and Extension.**
6. Click **Save**.



Customizing welcome email

Whenever an admin creates a user extension, the user receives a welcome email to set up their account. You can customize the email that the user receives and add your information.

To customize the welcome email sent to your new users:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Appearance**.
4. Click **Email Notifications**.
5. You may add the following optional information to your welcome email:
 - a. **Custom Logo**: Enter an image URL to customize the logo that appears in your email headers.
 - b. **Message**: Enter up to 750 characters.
 - c. **Contact Email**: Add your contact email.
 - d. **Support Contact Phone Number**: Add your company support contact phone number.
 - e. **Support Website**: Add your company website.
6. Tick the following checkboxes to add the info to your welcome email:
 - a. Include main company number.
 - b. Include direct number.
 - c. Include RingCentral Support Center information.
7. Click **Update Preview** to see your email preview.
8. Click **Save**.

Note: To set the welcome email back to default, click **Reset to Default**.

1

Home Users Phone System Meetings Reports Billing More

Admin Portal AG

2

3

4

5

6

7

Account Settings > Appearance

Company Logo Profile Member Email Notifications

Email Preview

Welcome

Dear new user,

Thank for creating your account for the RingCentral business phone system.

- Your company number is: 800-333-1212
- Your extension number is: 101
- Your direct line is: 1010-333-1212
- Your email address for support: 1010-333-1212@1010.com

Please visit our support document center to get a quick start guide.

[Set Up Account](#)

To view and manage this site and your account, visit [RingCentral Support Center](#).

[View our RingCentral Support Center](#)

Logging in to RingCentral

From the RingCentral login page, click on the link for [Single Sign-On](#) link. This link will take you directly to your account.

Thank you for using RingCentral.

For questions? The [RingCentral Support Center](#) offers online guides, instant articles and video and comprehensive details.

By subscribing to and/or using RingCentral, you acknowledge agreement to our [Terms of Use](#).

Copyright 2020 RingCentral, Inc. All rights reserved. RingCentral is a registered trademark of RingCentral, Inc., 20 Davis Drive, Redwood, CA 94063, USA.

Customize Email Notifications

Custom Logo (optional, max 300px x 30px)

Enter an image URL to customize the top that appears in your email header.

Message (optional, max 750 chars)

WFO: 1010-333-1212

Contact Email (optional)

Support Contact Phone Number (optional)

Support Website (optional)

Customize Welcome Email

- ☒ Include main company number (800-333-1212)
- ☒ Include direct number
- ☒ Include RingCentral Support Center information

Cancel Update Preview Save

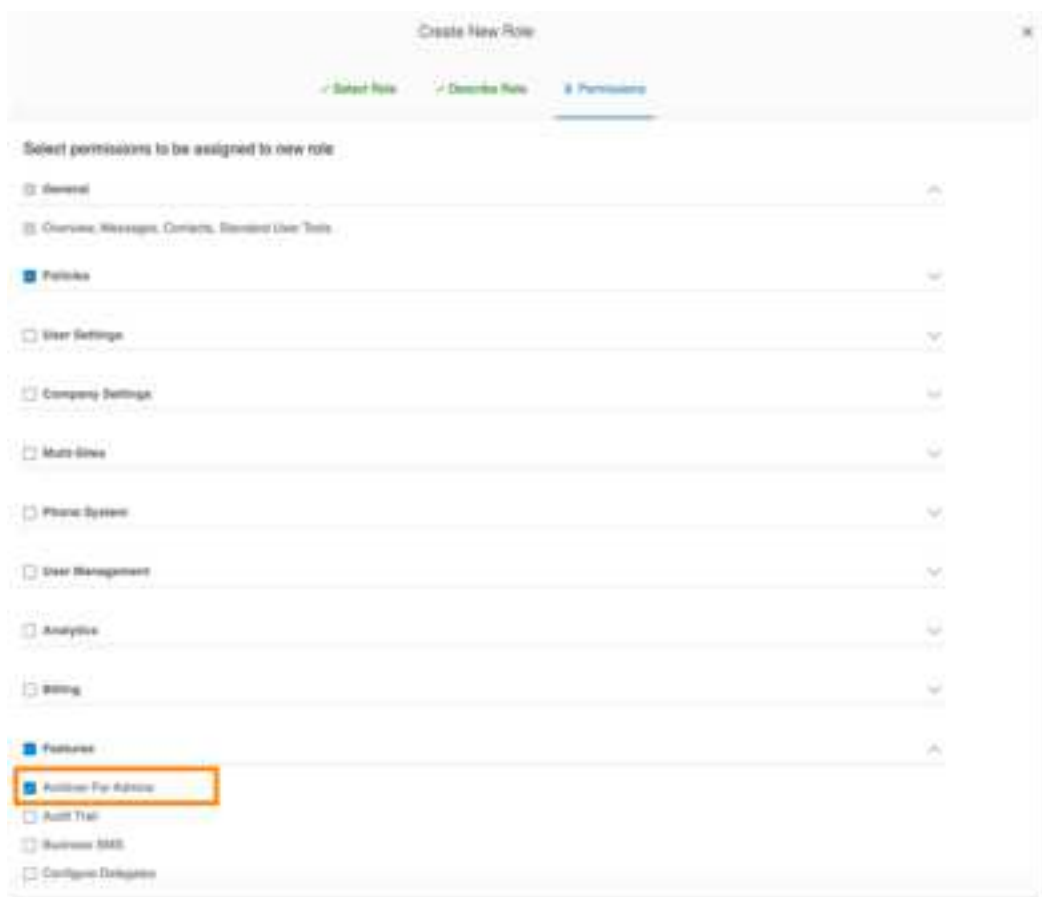
Archiver Settings

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.

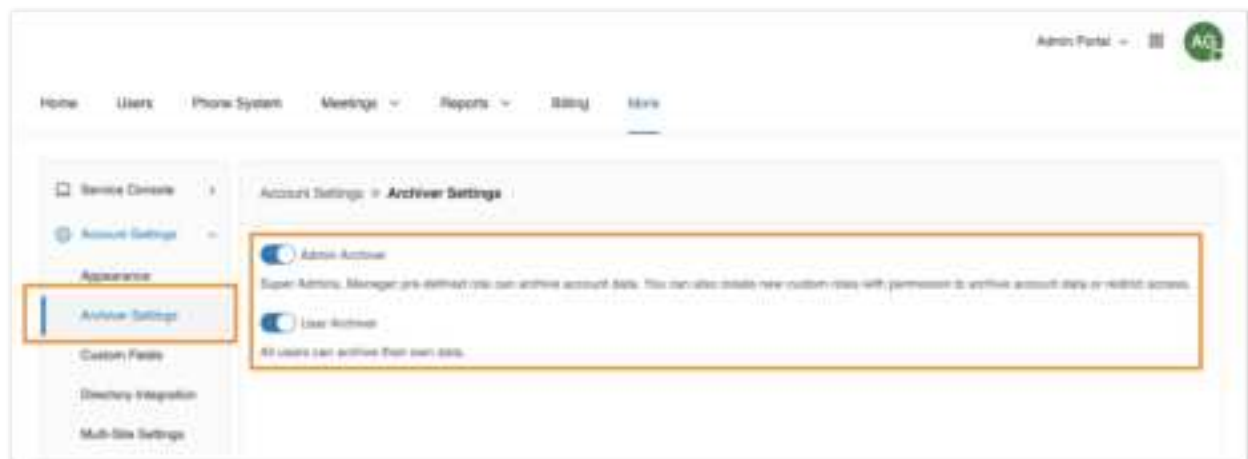
1. Log into your RingCentral account as an admin.
2. Navigate to **Users** via the top bar.
3. Click on **Roles** in the side navigation bar.
4. Click on an existing role or create a new one.
5. Scroll down to the **Features** section and check the box next to **Archiver for Admins**.
6. Click **Save**.



Enabling access for users

Super Admins and Managers can archive data for all; or enable users to archive their own data.

1. Log into your RingCentral account.
2. From the Admin portal (or My Extension for managers), go to **More** from the top navigation tabs.
3. Click on **Archiver Settings** in the left navigation bar.
4. Use the slider to enable archiver.



Directory integration

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

Active Directory

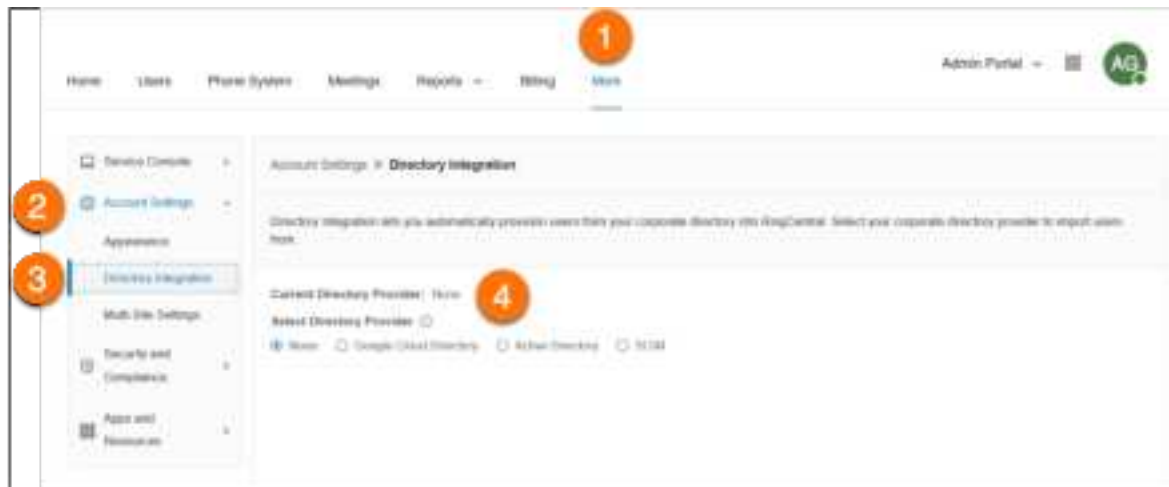
RingCentral integrates with Microsoft Active Directory to let you automatically provision users from Active Directory to RingCentral.

The service leverages Okta so you can perform an initial import from Active Directory to RingCentral, and to synchronize Active Directory and RingCentral on user status. Users are automatically enabled or disabled in RingCentral as they join or move around your organization.

To set up the RingCentral directory integration service, follow these steps:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Account Settings**.
3. Click **Directory Integration**.
4. Select from the following Directory Provider:

- None
 - Google Cloud Directory
 - Active Directory
 - SCIM
5. Enable your selected directory by following the steps provided.
 6. If required, edit the extensions of provisioned users in User Management in the Admin Portal.



Multi-site settings

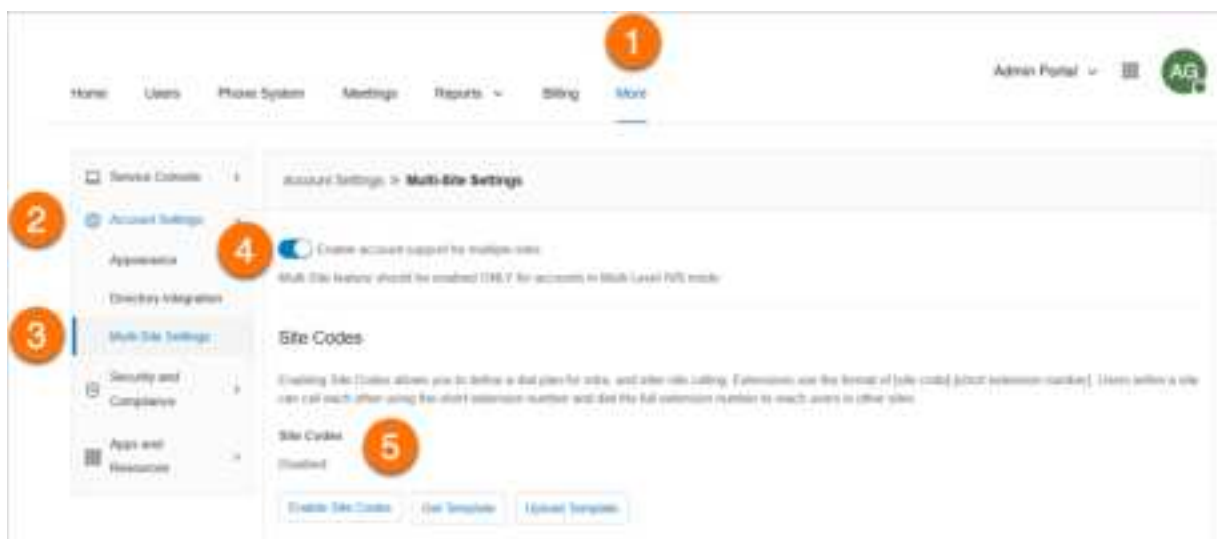
Multi-Site Support provides a management solution for customers with multiple branch locations. Multi-Site Support is available for RingCentral MVP Premium and Ultimate users with Multi-Level IVR enabled. Accounts configured with multi-site support can enable the Site Code feature to define a dial plan for intra-site and inter-site calling. This feature allows the administrator to allocate account user or group extensions for defined sites.

To enable Multi-Level IVR mode, configure the dial-by- name directory, create at least one IVR menu and enable the feature in Auto-Receptionist.

To enable your account to support multiple sites:

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

Your online account can now create and configure multiple sites. Site filters are available on pages with site assets to allow you to view the list of assets by sites.



Creating a new site

RingCentral Multi-Site support allows you to provision independent account configurations for your individual sites, to enable you to uniquely register and manage each site from your account. Once Multi-Site Support is enabled, you can create additional sites as needed.

To create a site, follow the steps below:

1. Click the **Phone System** tab from the **Admin Portal**.
2. On the **Company Info** page, click **New Site**.
3. On the **Site Info** page, enter the **Site Name**, **Site Address**, and **Site Extension**. Or, you may click **Select Site** under **Copy Settings from** to copy settings from another site. Click **Next**.
4. Configure the Regional Settings and Business hours. Click **Next**.
5. Assign Numbers to the Site. You may assign existing numbers or add (and purchase) new direct numbers. Click **Next**.
6. On the Caller ID Name page, enter the **Outbound Caller ID Name**.
7. On the IVR Menu page, select an **Existing IVR** or a **New IVR**.

On the Summary page, you will be notified that the site is created successfully. Click **Done**. You can view or edit site information within **Phone System > Company Info**.

Step 6: Caller ID Name

This name along with the phone number will be displayed to the called party whenever an outbound call is made using the local number on this caller ID. Max 15 characters. Note: Does not apply to toll-free numbers.

Select the name you want the caller ID to be displayed for this site. If selected, site's caller ID name will be set to be the same as company's caller ID name.

Outbound Caller ID Name

Step 7: IVR Menu

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: 0

Step 8: Summary

This new site is created successfully. You can now create or assign users, phone numbers and devices to this site. Site information can be viewed and edited later within Phone System > Company Info.

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.

1 Main navigation bar: Home, Users, Phone System, Meetings, Reports, Settings, **More**.

2 Account Settings sidebar: General, **Account Settings**, Appointments, Desktop Integration, **Multi-Site Settings**, Security and Compliance, Audit and Monitoring.

3 Multi-Site Settings page: Account Settings > **Multi-Site Settings**. Includes a toggle for 'Enable account support for multiple sites' and a 'Site Codes' section.

4 Site Codes page: Includes a 'Site Codes' section with a 'Disabled' status and links for 'Create New Codes', 'View Settings', and 'Default Properties'.

5 Extension Number Length configuration page: Includes fields for 'Site Code Length' and 'Short Extension Number Length'.

6 Site Codes page: Includes a 'Provision Site Codes' tab and a table for site code configuration.

7 Site Codes page: Includes an 'Assign Extension Numbers' tab and a table for assigning extension numbers to site codes.

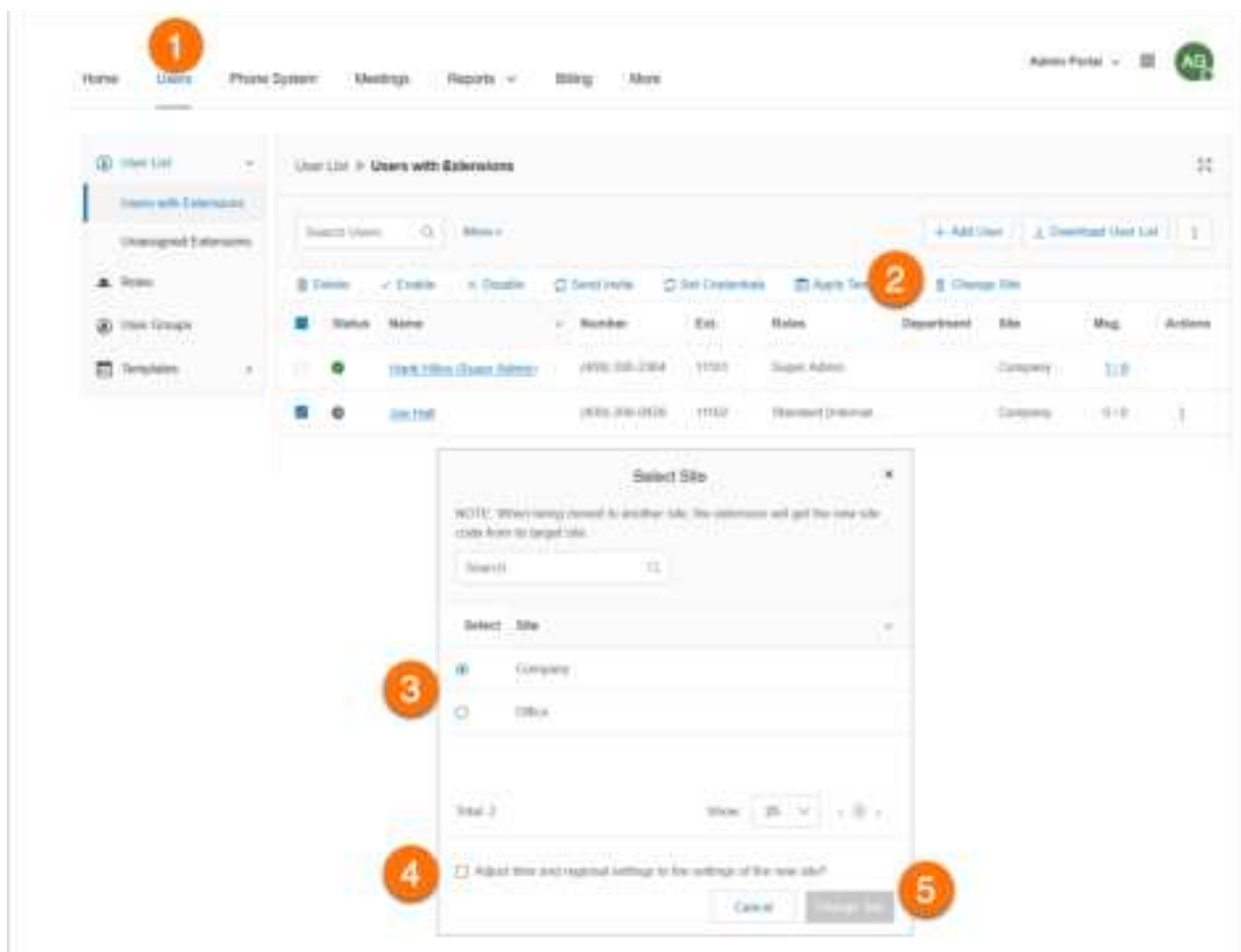
Ext. Name	Target Site	Site Code	Ext. Number with Site	Type of Location	New Short Ext.	Short Ext. #s
100-0000-0000	Company	01	100-0000		1	100-0000
100-0000-0000	Company	01	100-0000		4	100-0000
100-0000-0000	Company	01	100-0000		0	100-0000

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.

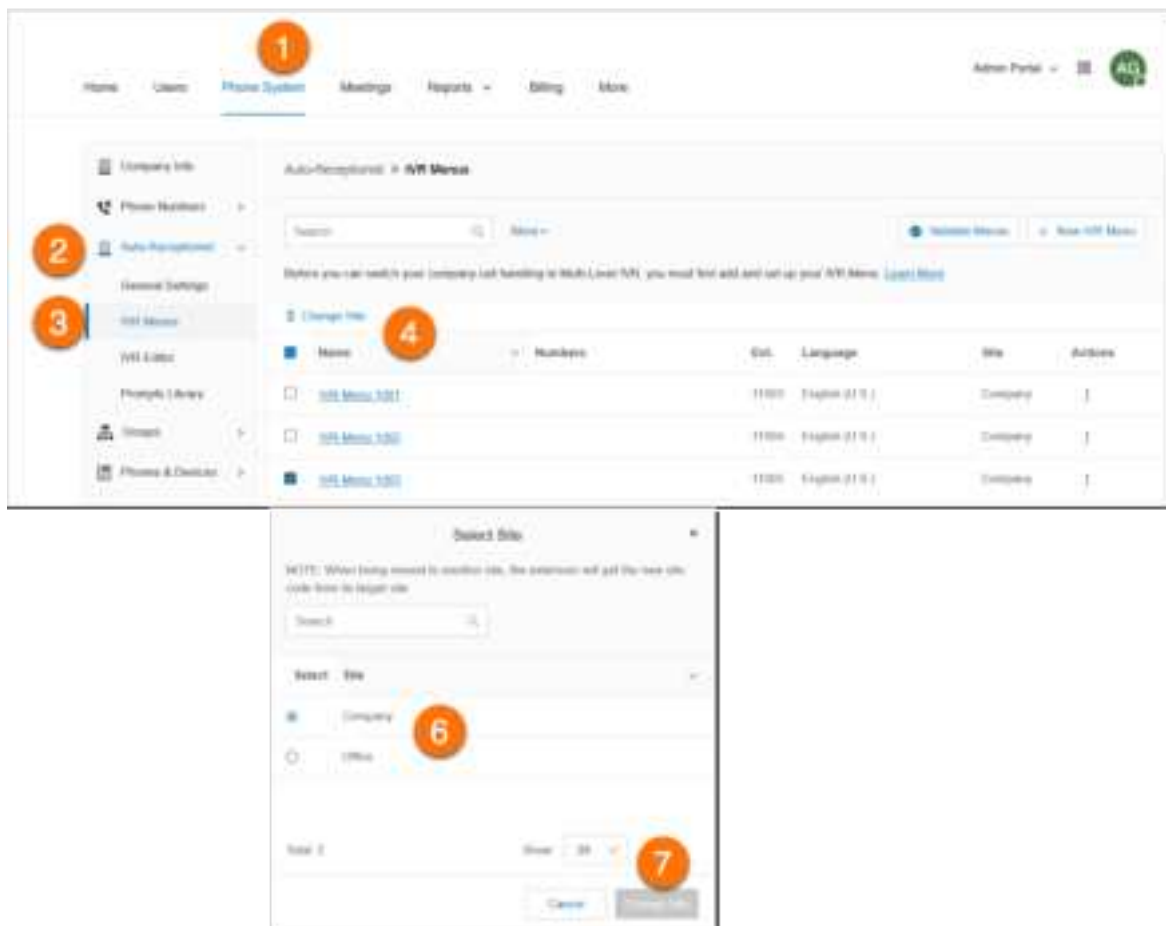
Moving users across sites

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**.



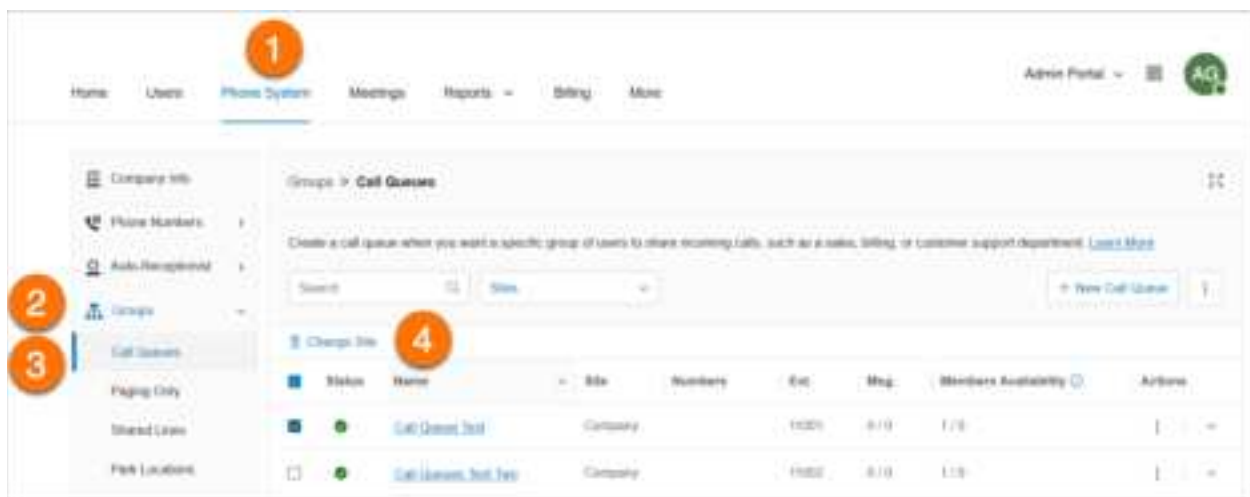
Moving IVR menus across sites

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Auto Receptionist**.
3. Click **IVR Menus**.
4. Select from the list of IVR Menus.
5. Click **Change Site**.
6. Select the site.
7. Click **Change Site**.



Moving call queues across sites

1. Click the **Phone System** tab from the **Admin Portal**.
2. Click **Groups**.
3. Click **Call Queues**.
4. Select the Call Queues that you want to move.
5. Click **Change Site**.
6. You may check the option to **Adjust time and regional settings to the settings of the new site?** to apply it to the moved Call Queue.
7. Click **Change Site**.



Security and compliance

Single sign-on

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

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

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

Configuring SSO

1. Click the **More** tab from the **Admin Portal**.
2. On the left-hand side, click **Security and Compliance**.
3. Click **Single Sign-on**.
4. Choose an option to set up SSO:
 - **Set up SSO by yourself:** Use the self-service UI to configure the Service Provider (SP) settings. Perform the steps in Set up Single Sign-On by Yourself .
 - **Contact Customer Support:** Use RingCentral Customer Support to configure the Service Provider (SP) settings. Click the **View Detail** link, and contact RingCentral support.
5. After configuring the SSO, you can turn on the SSO service for your company. To do so, check the box next to **Enable SSO Service**.

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

2 Service Console
Audit Trail
Service Status
Account Settings
3 Security and Compliance
3 Single Sign-on
Session Timeout
Hot Desk Session Timeout
Masked Numbers
Trust Portal
Apps and Extensions

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

RingCentral Single Sign-on (SSO) service lets your company authenticate your RingCentral users through your company-level network login credentials. About RingCentral SSO service [view guide](#)

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

SSO Configuration

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

4

Set up SSO by yourself

Step 1: Upload identity provider metadata file and certificate.

[Get File](#)

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

[Download](#)

Contact Customer Support

[Customer support center](#)

Contact RingCentral customer support to set up SSO.

[View Details](#)

5

Enable SSO

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

☒ Enable SSO Service.

Identity Provider Entity ID: None

SSO unique ID: None

[Save](#)

Setting up single sign-on by yourself

To set up SSO by yourself, upload your Identity Provider (IDP) SAML metadata, make sure the attribute is mapped correctly, and download the metadata for importing it into your Federation Server:

1. In the Set up SSO by yourself box, click **Set Up** to set up SSO for the first time, or **Edit** to change your configuration.
2. Under Upload IDP metadata, click drop down and select either Upload with file or URL. To upload with a file, click **Browse**, select a file, and click **Open**. To upload with a URL, paste the URL and click **Import**.
3. Select email attributes you want to use within your metadata from the drop down list under **Map Email Attribute to**. If the email attribute is not recognized, type out the name of the attribute by clicking Custom in dropdown.
4. Under **Certificate Management**, click **Upload** to upload a certificate and set the primary one. Click **Save**.
5. Download the Service Provider metadata and import it into your IDP server to complete the configuration on your IDP side.
6. Tick **Enable SSO Service** checkbox.
7. Click **Save**.

SSO Configuration

Set up Single Sign-on

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.

Step 2: Export Service Provider metadata and import it into your Federation Server.

Upload IDP metadata

Please provide a valid SAML metadata file.

Select Metadata by:

Upload with file

Browse

SSO (Service) Information

Identity Provider (Entity ID):

Name:

Connection Type:

Endpoint URL:

SAML Binding:

SAML Version:

Attribute Mapping

Please select any SAML attribute to map to the email attribute in the metadata.

Map Email attribute to:

Email

Certificate Management

Please upload certificate and set the primary one.

Upload

Enable SSO

Enable SSO Service

Identity Provider Entity ID:

SSO unique ID:

Allow users to log in with SSO or RingCentral credentials

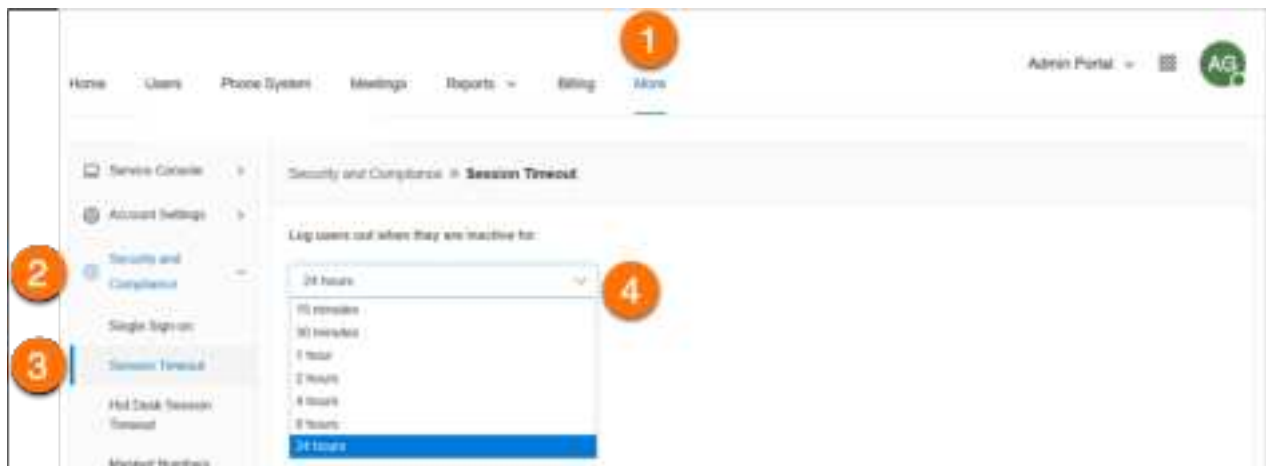
Save

Configuring session timeout

Configure a session timeout for all users on your account. If a user is inactive for a certain period of time, a warning message will appear notifying the user that the session is about to expire. The user can click **OK** to keep the session alive. However, if a user does not click **OK** before the time runs out, the user is logged out of the system and is asked to log in again.

To set a time interval for your phone system's session timeout:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Security and Compliance**.
3. Click **Session Timeout**.
4. Click the drop-down to view a list of time intervals.
5. Select the time interval you would like to use.
6. Click **Save**.

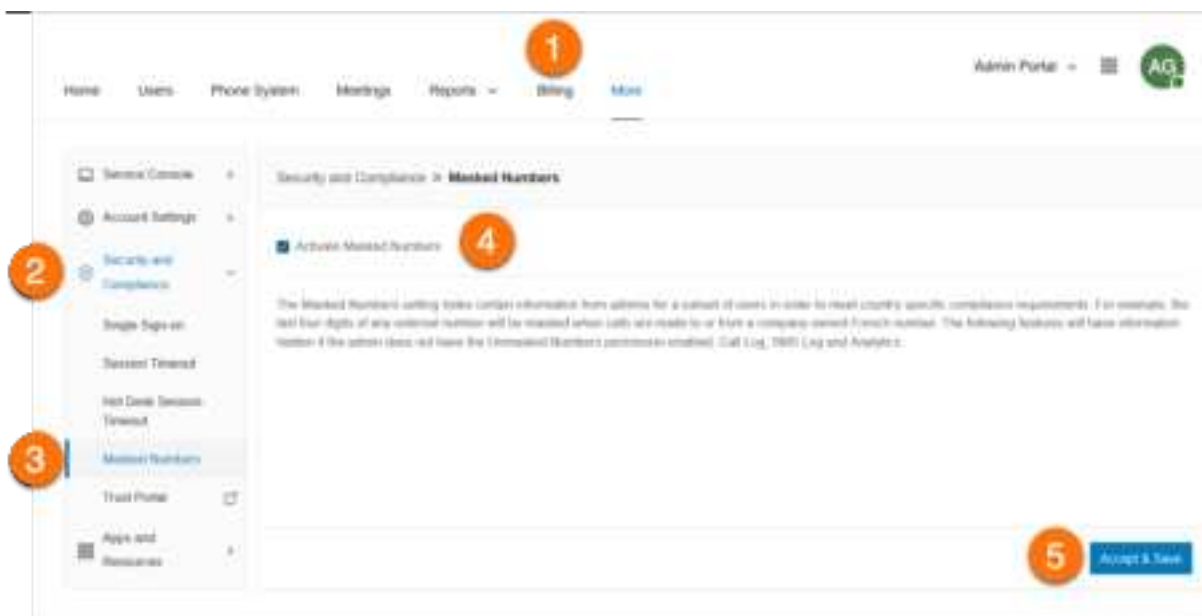


Enabling masked numbers

The Masked Numbers setting hides certain information from Administrators for a subset of users in order to meet country-specific compliance requirements. This feature needs to be activated first before the Unmasked Numbers permission can be accessed in Roles. Administrators with the Super Admin role will automatically have the Unmasked Numbers permission enabled.

To enable Masked Numbers:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Security and Compliance**.
3. Click **Masked Numbers**.
4. Check **Activate Masked Numbers**.
5. Click **Accept & Save**.
6. Click **OK** on the **Alert** dialog.
7. At this point, you can either create a role with the Unmasked Numbers permission enabled, or you can enable the Unmasked Numbers for a role.

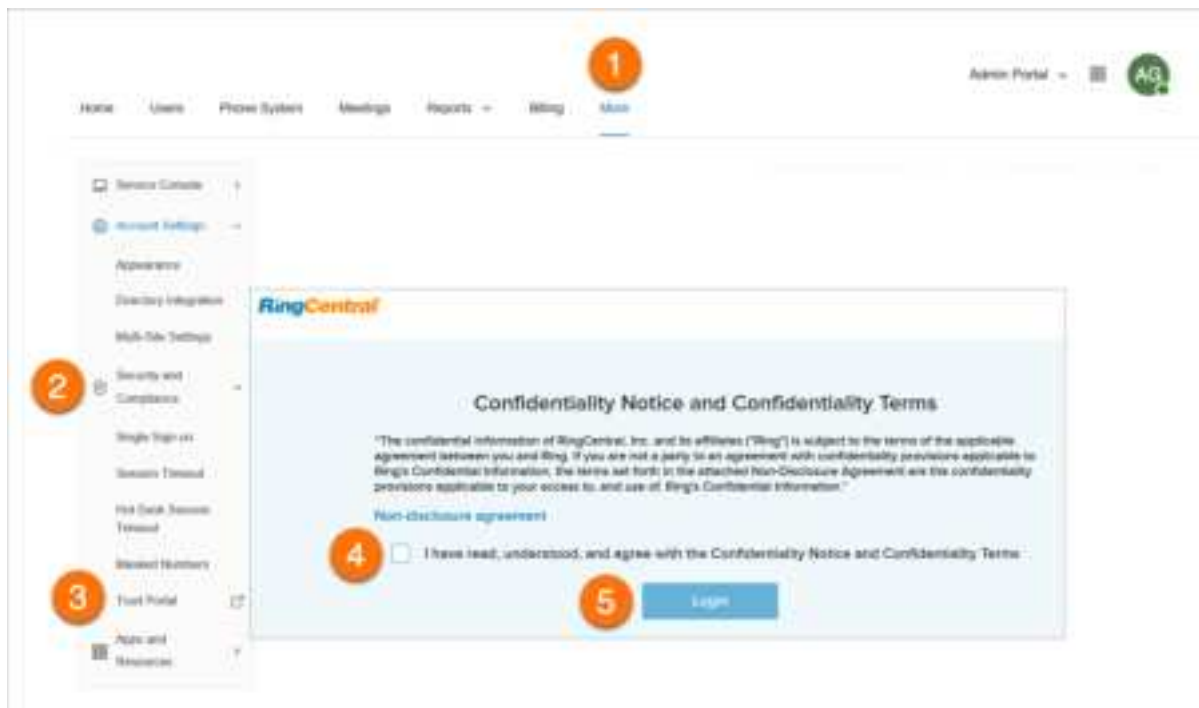


Accessing the Trust Portal

All current RingCentral MVP, RingCentral Contact Center, and data center compliance and security documentation will be accessible via the portal. For questions, please contact your Account Manager or Sales Representative.

To access the Trust Portal:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Security and Compliance**.
3. Click **Trust Portal**.
4. Accept the terms, then click **Login**.
5. Click the report name to view or download the PDF.



Apps and resources

Archiver

The RingCentral Archiver allows you to backup RingCentral data via Dropbox, SFTP, Google Drive, and Box integration. This provides an automatic backup solution, as well as a convenient way of storing and retrieving phone data.

To configure Archiver:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Apps and Resources**.
3. Click **Archiver Beta**.
4. Connect RingCentral Archiver to one of the following:
 - a. Dropbox
 - b. SFTP
 - c. Google Drive
 - d. Box
 - e. Smarsh

Note: You can only connect to one storage per instance. For example, one cannot use Dropbox and Google Drive at the same time

5. Click **Sync Options**.
6. When connected to the archiver account, you can enable or disable data backup by selecting **Enable Backup**.
7. Select the types of Data to backup. By default, Call Recordings are backed up for admins and users. Users can select for their own extensions whether to backup Call Recordings, Voice Mails, SMS and/or Fax.

Note: Archiver is available to RingCentral MVP Premium and Ultimate customers. It is also available to RingCentral customers in Canada, UK, and Europe.

The screenshot displays the RingCentral Admin Portal interface, specifically the 'Apps and Resources' section. The page is titled 'Apps and Resources' and 'Archiver Beta'. The left sidebar contains a navigation menu with items: Service Console, Account Settings, Security and Compliance, Apps and Resources (highlighted), Archival Tools, App Gallery, and Developer Portal. The main content area has tabs for Accounts, Sync Options, and Phone. Below the tabs, there is a section titled 'Selected Account To Connect' with a list of services: Dropbox, SFTP, Google Drive, and box. Each service has a 'Connect' button. At the bottom, there is a section titled 'Data to backup' with a toggle switch for 'Enable Backup' and a list of items: Call Recordings, Voice Mail, Text, and PAX. Seven numbered orange circles are overlaid on the image: 1 points to the 'Home' link in the top navigation bar; 2 points to the 'Apps and Resources' link in the left sidebar; 3 points to the 'Archival Tools' link in the left sidebar; 4 points to the 'Selected Account To Connect' section header; 5 points to the 'Sync Options' tab; 6 points to the 'Data to backup' section header; and 7 points to the 'Text' item in the 'Data to backup' list.

1

Home Users Phone System Meetings Reports Billing Home

Admin Portal AG

Service Console Account Settings Security and Compliance Apps and Resources Archival Tools App Gallery Developer Portal

Apps and Resources Archiver Beta

Accounts Sync Options Phone

Selected Account To Connect

Dropbox Not connected Connect

SFTP Not connected Connect

Google Drive Not connected Connect

box Not connected Connect

Accounts Sync Options Phone

6 Data to backup Enable Backup

7

Call Recordings Voice Mail Text PAX

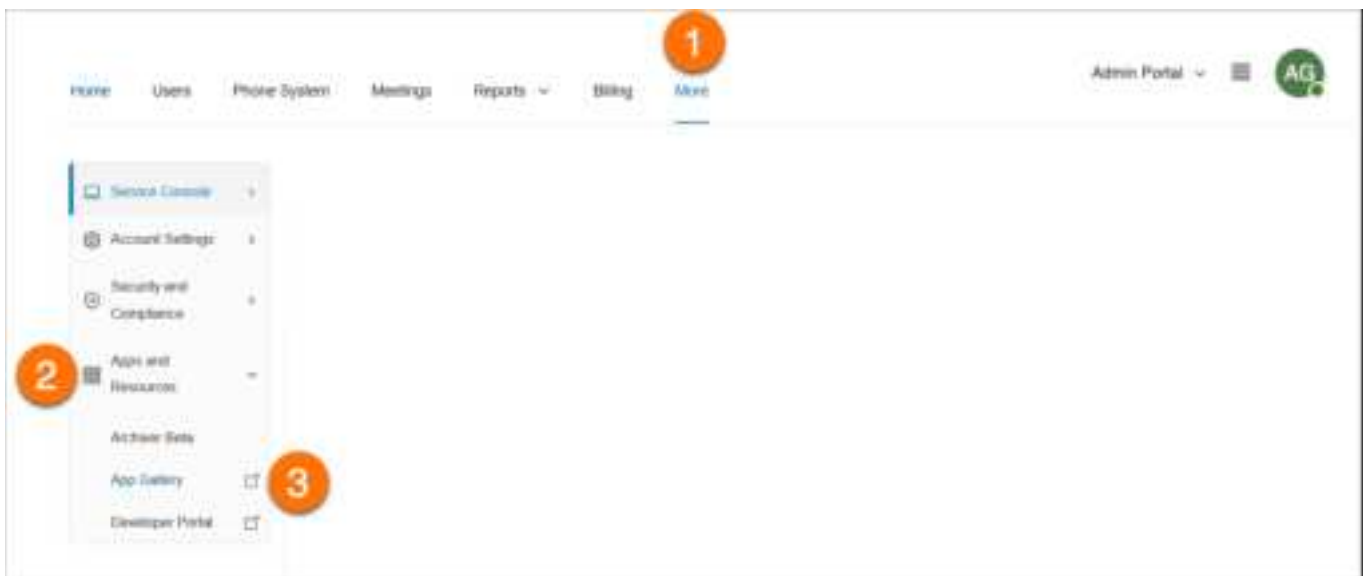
App Gallery

The App Gallery is a destination where you can discover application integrations that are commercially available, and where developers can showcase their integrations.

To access the App Gallery via the online account:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Apps and Resources**.
3. Click **App Gallery**.

A new window will open to the [RingCentral App Gallery](#) website.



Developer Portal

The RingCentral Developer Portal offers a set of tools and services to build, deploy, and manage custom integrations using RingCentral APIs. With this, developers can build out-of-the-box integrations with RingCentral to add powerful communication capabilities to business applications.

To access the Developer Portal via the RingCentral online account:

1. Click the **More** tab from the **Admin Portal**.
2. Click **Apps and Resources**.
3. Click **Developer Portal**.
4. A new window will open to the [Developer Portal](#).

SMS and MMS

There are two types of SMS:

- **Person-to-Person (P2P) or standard SMS:** Communication of two or more people over text messaging. Sending text messages from your phone to another person's phone is an example of P2P.
- **Application-to-Person (A2P) or High Volume SMS:** A text message that a person receives from an application. This includes, but not limited to, marketing messages, appointment reminders, chat bots, virtual assistants, notifications, and one-time passwords (OTPs), or PIN codes.

Wireless carriers treat P2P and A2P differently in terms of the type and volume of traffic allowed.

Standard SMS and MMS

RingCentral MVP enables you to send SMS and MMS messages a few different ways.

Business SMS and MMS

The RingCentral Business SMS and MMS feature allows you to send and receive text messages and multimedia files with your business number. This feature is available for customers in the US and Canada (SMS only in Canada) and automatically activated for RingCentral MVP users.

RingCentral also supports toll-free number SMS activation for US and Canada. [Contact Support](#) to process this request.

You can use your RingCentral phone numbers for sending and receiving text messages via the RingCentral app.

Group SMS

You can send a text message to several people (up to 10) at once via the RingCentral app. This will create a text conversation with all parties.

RingCentral app currently supports group text messaging only to numbers from the US, Canada, and Puerto Rico.

Sending a group SMS

1. Click on the **New actions** plus button at the top right.
2. Select **Send new text** from the dropdown menu.

3. If you have several Direct Numbers or Digital Lines, click inside the **Text from** field and select your preferred outbound caller ID.
4. Enter the names (from your contact list) or phone numbers of the people you'd like to text in the **To** field (you can enter up to 10). Separate the numbers by a comma or semicolon.
5. Ensure the **Create group text** box is checked.
6. Click the **Next** button to navigate to the text message conversation.
7. Draft a message in the message field at the bottom of the app.
8. Send the text message by pressing Enter or Return on your keyboard.

Bulk SMS

You can send the same message in bulk (up to 100 recipients) via the RingCentral app. Different from a group message, sending a text message in bulk means sending the same message to multiple people in separate messages.

Sending a bulk SMS

1. Click on the **New actions** plus button at top right.
2. Select *Send new text* from the dropdown menu.
3. If you have several Direct Numbers or Digital Lines, click inside the **Text from** field and select the outbound Caller ID from which you'd like the text to come.
4. Enter a list of the names or phone numbers of the people you'd like to text in the **To** field.
5. Uncheck the **Create group text** box, so you can add more than 10 numbers/names (you can enter up to 100).
6. Enter your message in the resulting text field. Attach files and insert emojis using the **Attach file** and **Emoji** buttons (respectively).
7. Click the **Send** button to send the text message to all contacts provided.

High Volume SMS

Send targeted or bulk SMS campaigns using our [programmatic API](#) or [ready-to-use app](#) with a full communications platform, deep insights, and the ability to ensure regulatory compliance.

With High Volume SMS, customers can send SMS at higher rates, send mass promotions, send automated messages, appointment reminders, notifications, and more without having their messages blocked by the carriers as long as they don't contain shortened URLs or spam content.

High Volume SMS features

Whether you're sending promos for e-commerce, healthcare appointments, reminders in education, chatbots in hospitality or anything in between, High Volume SMS provides functionality for all industries and businesses of any size.

- up to 250,000 text messages per day
- automated message queuing
- opt-out/opt-in handling
- detailed reporting and error codes

API vs High Volume SMS app

The High Volume SMS API is configured for customers who require more sophisticated functionality and want to build more customized workflows for their organizations. Our developers can review code samples and start building your custom SMS app. To learn more, visit our [API Reference Guide](#).

Availability and pricing

RingCentral MVP Standard with \$50 MRR+ (Monthly Recurring Revenue), Premium, or Ultimate plans can take advantage of High Volume SMS. Local (10-DLC) and toll-free numbers are supported in the United States. Only Toll-free numbers are currently supported in Canada. High Volume SMS is priced at \$0.007 per message sent or received with no additional carrier fees, all on your RingCentral bill.

Getting Started

You must first enable your RingCentral number to send High Volume SMS. To do so, submit a request via the enrollment form.

Note: If you use an existing RingCentral number, you can no longer use it for SMS across other products, including the RingCentral app. Visit the RingCentral Service Desk or contact your RingCentral account manager if you'd like to add another number to your account.