Online User Guide ... covers more information, helping you understand and configure all the features.

- **Answering Rules** – create After Hours rules, Custom rules, and more.
- **Greetings and Music on Hold** – create Company greeting, order professional voice, and more.
- **Message Notification** – understand Advanced options, design missed call notification, and more.
- **Extensions (optional)** – create company rules, dial-by-name directory, and more.
- **Messages** – check voicemail from the phone, listen online, download voice and fax mail, and more.
- **Account Settings** – add another telephone number, change service plan, and more.
- **Call Settings** – block calls by ID, RingOut, RingMe, and more.
- **Contacts** – import and export contacts with Outlook, and more.
- **Call Logs** – learn how to read the logs of all calls captured, set-up auto email, and more.
- **On Call Actions** – put a call on hold, transfer the call to another number or extension, and more.
- **Faxing** – send faxes using FaxOut, directly from Email, and more.
Answering Rules – Creating an After Hour Rule

Create an After Hours rule to handle incoming calls differently on nights and weekends.

1. Click **My Settings** in the main menu.
2. Click **Answering Rules** in the left panel. The Answering Rules Summary page opens.
3. Click the **Click here to define your hours of operation** link. The Add Rule Wizard panel opens.
4. List the daytime hours you will be open for business.
5. Click **Next** to continue.
6. Users normally want their After Hours calls to roll to Voicemail. That is why the Take Messages Only answering mode is set by default.

You can also route After Hours calls to another number, or set to another mode other than Take Messages Only.

7. Click Submit to save.

8. Your Business Hour rule is now in place. Calls outside of these daytime hours roll to the After Hours rule.
Answering Rules – Creating a New Custom Rule

Custom rules can be created at the Company or Extension level.

Custom Rules can be designed by When the caller is dialing you, Who is calling and/or What RingCentral number they are calling.

Use Custom Rules for:

- Routing important customer calls in priority manner
- Playing Holiday greetings, sending callers straight to voicemail
- Directing calls to different employees based on a fixed schedule

1. Click **My Settings** in the main menu.
2. Click **Answering Rules** in the left panel.
3. Click the **Add Rule button** in upper-right hand corner.
4. First, you configure WHEN the rule applies. Enter the day and hours you want this rule to be in effect.
5. If you want the rule to be in effect for a date range, click the Date Range Schedule tab instead (e.g., Holiday or Vacations rules)
6. Click the **Next** to continue.
Custom rules can be created at the Company or Extension level.

7. Now configure WHO this rule is for – which inbound caller IDs it will handle.
   
   You can enter the ten digit phone number then click Add to post the number to the list.
   
   You can also drag Contacts into the list by clicking the Add from Contacts link.

8. Click **Next** to continue.

9. Now configure WHICH RingCentral number this rule is for.

10. Click **Next** to continue
Custom rules can be created at the Company or Extension level.

11. Review your wizard settings. Click an Edit link if you want to go back and change the From: or When: configuration.

12. Click Next to continue.

13. Give this Custom Rule a name.

If you wish to copy an existing Answering Option configuration from another rule, you can select it from the Create New dropdown list if you wish to design a new Answering Option tree.

14. Click Next to continue.
15. You are now presented with an Answering Mode panel to configure how you want calls handled for this rule.

16. In this example **Full Call Control** will be used.

17. The callers will not be screened.

18. They will hear Jazz hold music...

19. ...while two phones are rung in a Sequential Fixed order.

20. If neither of the phones answers, the caller will roll to voicemail. The Default greeting will be played.

21. Click **Submit** to save the changes. The new custom rule is now enabled.

**NOTE:** If your Business Hours Rule conflicts with your Custom rule, your Custom Rule will be used, and the Business Hours Rule will be ignored.
Answering Rules – Sending Inbound Calls Straight to your Mobile

Follow these steps to simply forward calls straight to one telephone, such as your mobile.

1. Click My Settings in the main menu. The Account Summary page opens.

2. Click Answering Rules in the left panel. The Answering Rules Summary page displays.

3. Click Business Hours under My Rules. The Business Hours Answering Rules page opens.

4. In the Select your Answering mode field, choose Ring a number Only from the drop-down list.

5. Enter your ten digit mobile number (or the number for your work, home, or other device you will take the call on).

6. Click Submit to save changes.

**NOTE:** The caller will hear ring tones until your mobile answers. If no answer the caller is routed to your mobile’s voice mail box (caller will not be directed to your RingCentral voicemail box.)
Answering Rules – Sending Inbound Calls Straight to Voicemail

1. Click **My Settings** in the main menu. The Account Summary page opens.

2. Click **Answering Rules** in the left panel. The Answering Rules Summary page displays.

3. Click **Business Hours** under My Rules. The Business Hours Answering Rules page opens.

4. In the **Select your Answering mode** field, choose Take Messages Only from the drop-down list.

5. In the **Take Messages** drop-down list, select **Yes**.

6. Play Voicemail Greeting: Select the Voicemail Greeting or record your own by clicking New.

7. Deliver new messages to extension: Select the extension to receive the voicemail messages (if extensions are enabled).

8. Click **Submit** to save changes.
Answering Rules – Activating Do Not Disturb

Note: Do Not Disturb is designed to temporarily transfer incoming calls to voicemail. Do Not Disturb overrides all other settings, and is designed for those times when you are temporarily out of the office or do not want to be contacted. An incoming caller will hear the voicemail message and be asked to leave a message.

1. Click **My Settings** in the main menu. The Account Summary page opens.

2. Click **Answering Rules** in the left panel. The Answering Rules Summary page displays.


4. Click **Submit** to save changes.

To Edit the Do Not Disturb rules:

1. Click **Edit**. The Do Not Disturb Answering Rules page displays.

2. Edit your Voicemail settings to fit your preferences (see prior page for instructions).

3. Click **Submit** to save changes.

To turn Off your Do Not Disturb setting, simply deselect the Do Not Disturb checkbox and press Submit.
1. Click **My Settings** in the main menu. The Account Summary page displays.

2. Click **Answering Rules** in the left panel. The Answering Rules Summary page displays.

3. Click **Edit** or the Name of the rule that is enabled to receive the call to your RingCentral number. The Answering Rules page of that rule displays.

4. **Answering Mode**: Select either Full Call Control or Take Messages Only from the drop-down list.

5. **Take messages**: Select **Yes** and set either Voicemail and Fax or Fax Only from the drop-down list.

6. Click **Submit** to save changes.

**NOTE**: For accounts using Extensions:
If you have multiple extensions or rules, each can be set up to receive faxes.

If you want to receive faxes on an extension, the caller must dial the extension number before they start the transmission. Accordingly, your callers can either:

Wait for the system to pick up, dial the extension number and then push Start/Send, or Dial the entire sequence of numbers into their fax machine and separate the phone number and extension number with the Pause key. For example: 800-555-1212-P-101

If you want to receive faxes when the caller has not dialed a specific extension, you must configure your 0-System Extension to receive faxes. Anytime the system hears a fax signal in your Company Greeting, it will save the fax to your 0 extension’s mailbox.
Greetings
- Select or create Company Level Main Greeting used by your Answering Rules.

1. Click My Settings tab in the main menu. (Account Summary page opens)
2. Click Greetings on the panel under CALL SETTINGS. (Greetings page opens)
3. Click the Go to Company Greetings link.
4. Select the default greeting via the Company Greeting drop-down list:
   Thank you for calling [My Company]...
   Thank you for calling. If you know...

RingCentral’s text-to-speech program will insert your company name into the greeting if the “My Company” option is selected.

5. Click the green arrow icon to hear the message.

Click Submit to save changes.

OR

6. Press New to record a personalized greeting or import prerecorded sound (.wav) files. (New Company Greeting for Company Business Hours Rule page opens)
7. Follow the Record over the Phone instructions.

Click Submit to save changes.

Notes:
• Type a new name in the Voicemail name field to change your Voicemail name.
• Click Record or Edit button to record your name for callers to hear.
• From this page, you can also set Introductory or Voicemail greetings for different extensions. Check that you are logged into the correct extension before changing settings.
Greetings – Order Professional Voice Talents to Record Greetings

Customize your RingCentral account with a professional voice!

1. **Click My Settings tab in the main menu.** (Account Summary page opens)

2. **Click Greetings on the panel under CALL SETTINGS.** (Greetings page opens)

3. **Click the image ad.**

4. **Watch the “Take a quick tour” video.**

5. **Press Start Now to place your order.**

**NOTE:**
- Establish credibility, present a professional presence, and enhance business image by ordering professional voice talents to record greetings!
- One low price features more than 80 professional voices and hundreds of music tracks to choose from!
How To Record Company Greeting Over the Phone

• Call your RingCentral number
• Enter your extension 0
• Press Star key (*) at any time
• Enter your password followed by the Pound key (#)
• Press 2
• Press 2
• Press 2
• Listen for the rule Company Business Hours and select it when prompted to do so
• Press 3 and follow directions

How To Record Voicemail Greeting over the Phone

• Call your RingCentral number
• Enter your extension 0
• Press the Star key (*) at any time
• Enter your password followed by the Pound key (#)
• Press 2
• Press 2
• Press 1
• Listen for the rules, e.g., Business Hours and Do Not Disturb, and select it when prompted
• Press 2 and follow the instructions

How To Record Your Name Used in Greetings Over the Phone

The RingCentral text-to-speech program inserts your First and Last name into the greeting when default Introductory or Voicemail greetings are used, e.g.,

“Your call has been forwarded to the voicemail for Bob Johnson. No one is available to take your call. At the tone, please record your message...”

Instructions on how to have your own voice pronounce your name:

• Call your RingCentral number
• Enter your extension 0
• Press Star key (*) at the prompt
• Enter your password followed by the Pound key (#)
• Press 2
• Press 1 and follow the directions
How to Record Greetings from the PC

1. Click My Settings tab in the main menu. (Account Summary page opens)
2. Click Greetings on the panel under CALL SETTINGS. (Greetings page opens)
3. Click the New button corresponding to the greeting you want to record, e.g., Introductory Greeting, Play Connect Prompt, and Voicemail Greeting. The recording page for that specific greeting opens.
4. Click Record with Microphone.
5. Enter a name for your greeting in the Greeting name box.
6. Press Record.
7. Speak into the PC’s microphone.
8. Press Stop to stop recording.
9. Press Play to review your greeting.
10. Click Submit when finished.

NOTE:
• Recording Greetings from PC only works with Internet Explorer 5.x and higher.
Greetings – Changing the Name of a Greeting

When you record a new Voicemail greeting from the telephone, RingCentral will name the file as “Voicemail Greeting Date/Time”.

To rename the file with a different description:

1. Click My Settings tab in the main menu. (Account Summary page opens)

2. Click Greetings on the panel under CALL SETTINGS. (Greetings page opens)

3. Click the Edit button of the greeting you want to rename. (Edit Custom Voicemail Greeting panel opens)

4. Rename the file.

5. Click Submit to save changes.
1. Click **My Settings** tab in the main menu. The **Account Summary** page displays.

2. Under **Call Settings** panel, click **Music On Hold**. The **Music On Hold** page displays.

3. Refer to **My Rules** section; click the **Music On Hold** drop-down list, then select your preferred option as to what music you want your callers to hear while being forwarded to your telephone numbers. You can also set the Music On Hold to **Nothing (Silence)** if you don’t want any music played.

4. Refer to **Built-in Rules** section; then click **Interrupt music every** drop-down list, and select how often you want hold music to be interrupted with messages.

5. You can also select a message prompt by clicking **Interrupt with prompt** drop-down list, and selecting your preferred message prompt. You can hear the message prompt by clicking the green arrow icon located right beside the drop-down list. If you want to record new music, click the **New** button.

6. Refer to **Caller on Hold** section; you can select the type of Hold music callers will hear when you place them on hold during a conversation by clicking the drop-down list.

7. Click **Submit** to save your changes.
Music On Hold – Importing pre-recorded Music (in .wav format)

1. Click the **My Settings** tab in the main menu. The Account Summary page displays.
2. Click **Music On Hold** in the **Call Settings** panel. The Music window displays.
3. Click the **New** button corresponding to the music or greeting you want to upload. The **Upload Music On Hold – New** page displays.
4. Enter a name for your greeting in the greeting **Name** field.
5. Click **Import**. Your browser’s search window displays. Browse the file you wish to import, highlight and click Open. A status bar will display the progress. Your greeting has been loaded when the status bar stops moving and the length of your greeting is displayed. Click **Play** to review your greeting.
6. Click **Submit** to save your changes.

**Tip:** For best quality greeting, format must be either:
- CCITT u-Law (G711a), 8 kHz, 8 bit mono (recommended) or
- PCM 8 kHz, 16 bit mono

**NOTE:** Importing music only works with Internet Explorer 5.x and higher. The Active X Control does not work in Netscape, Mozilla or Mozilla Firefox browsers.

### Upload Music On Hold - New

You can upload your own custom music on hold using the interface below.

Please enter a name for your music on hold and then press **Import** to upload a pre-recorded .wav file (the properties of your .wav file must be PCM, 8kHz or 11kHz, 16 bit, mono).

You can also use the **Record** button to record music from an external device, like a CD player, using the line-in on your computer.

The maximum allowed duration is 15 minutes.

**Name:**

Guitar Music
1. Click **My Settings** in the main menu. The **Account Summary** page displays.

2. Click **Notification Settings** in the left panel. The **notifications Settings** page displays.

3. Click the button for more advanced notification options. Customize text and e-mail delivery of different types of messages to different employees.

4. In the **Voice Message** panel, configure to receive e-mail and text messages when voicemail arrives.

5. If you uncheck the **Urgent Priority** box in the **Voice Messages** panel, you could even configure different delivery addresses if the voicemail was marked “Urgent.”

6. Click **Submit** to save changes.
1. Click **My Settings** in the main menu. The **Account Summary** page displays.

2. Click **Notification Settings** in the left panel. The **Notifications Settings** page displays.

3. Enter your Mobile’s text address to which to send the SMS alert. Use the **Add Mobile Phone** link and RingCentral will append the carrier’s DNS address.

4. **Voice Messages**
Select **Enabled** in the **Text Messaging** drop-down box if you want to automatically receive a text message alert on your mobile.

5. **Fax Messages**
Select **Enabled** in the **Text Messaging** drop-down box if you want to automatically receive a text message alert on your mobile.

6. Click **Submit** to save changes.

*Example of the text notification*

From: RingCentral

Subject: Voice Message

Msg: New Voice Message from Bob Smith (754) 345-1212 for RingCentral user (602) 556-3834
1. Click My Settings in the main menu. The Account Summary page displays.

2. Click Notification Settings in the left panel. The Notifications Settings page displays.

3. Enter your Mobile address.


5. Check the “Unless a message was received” and “Unless the call was answered” check boxes.

6. Click to save changes.
1. Click **My Settings** in the main menu. The **Account Summary** page displays.

2. Click **Web Settings** in the left panel. The **Web Settings** page displays.

3. Select your preferences.

4. Check “Automatically delete old messages..” box if you receive lots of messages, and don’t want mailbox filled up. If this option is not selected and when your mailbox is full, callers will not be allowed to leave a message.

5. Install the “RingCentral Voicemail Player” from your Download menu, choose it as your default media player.

6. Click the “play audio” icon in your **Messages** folder to listen to the voicemail messages.

7. Click **Submit** to save changes.

**NOTE:** The Voice mail player options can only be viewed in Microsoft Internet Explorer. Other browsers are not compatible.
1. Click **My Settings** in the main menu. The **Account Summary** page displays.

2. Click **Fax Settings** in the left panel. The **Fax Settings** page displays.

3. Select to receive incoming faxes as PDF or TIFF files.

4. Choose the cover page style to use when using FaxOut or fax by e-mail.

5. Enter all e-mail addresses that will be allowed to send faxes via e-mail through this account.

   **NOTE:** The e-mail address you entered in Personal Information is always treated as a trusted address.

6. Check whether to not include a Cover Page when Subject field is empty.

7. Click **SUBMIT** to save changes.
1. Click **Company Settings** in the main menu. The Extensions Summary page opens.

2. Click **Company Rules** in the left menu. The Company Menu Rules page opens.

3. If you wish to establish a separate After Hours rule, press the link to the right of the Company After Hours line and follow the wizard. (If you don’t create After Hours times, the Business Hours rule will be in operation 24 hours a day.

4. To establish how calls will be answered at the Company level during Business hours, click **Edit**.

5. Specify how to handle incoming calls. Either:
   a) Play Company Greeting with option to disconnect caller or send onto extension 0 after greeting is played,
   
   OR
   
   b) Don’t play Company Greeting. Route caller directly to a specific extension, or, to all extensions in rotating order.

6. Click **Finish** to complete.
Extensions – Activating a Company Directory

1. Click **Company Settings** in the main menu. The Extensions Summary page displays.

2. Click **Company Directory** in the left menu panel. The Company Greetings page opens. (Click Continue to set up your Company Directory).

3. In the Company Directory Settings Page:
   a) Enter the Extension Number the callers will use to access your Company Directory.
   b) Select whether to search by First Name or Last Name.
   c) Select the amount of letters (between 1-4) the callers will enter to search.
   d) Choose if the callers will hear the entire directory when pressing (1).
   e) Click Next.

4. In the Company Directory – Extensions page:
   a) Select the Extensions you wish to add to your Company Directory.
   b) Click **No** to toggle **Yes** in the Directory Company column.
1. Click **Company Settings** in the main menu. The Extensions Summary page displays.

2. Click **Extensions Permissions**. The Extension Permissions page displays.

3. Set permissions for:
   - Admin
   - International
   - RingOut
   - RingMe
   - Send Fax
   - Caller ID
   - After Agent Profile Rule
   - View extensions
   - Regional Settings

4. Click **Submit** to save changes.
Extensions – Adding more Extensions

1. Click **Company Settings** in the main menu. The Extensions Summary page opens.

2. Click **Add Extensions**. The Additional Extensions page opens.

3. Enter the number of additional extensions needed.

4. Click **Submit**. The Extensions Summary page opens with the additional extensions disabled.

Your RingCentral plan comes with extensions:
- Professional – 5 extensions
- Business Plus – 10 extensions
- Business Power – 20 extensions
- Business Premium – 100 extensions

5. Click **Continue** to proceed.

You will only need to purchase additional extensions when you have used your allotment.

Tip: The most cost effective way to get more extensions is to upgrade to a higher service plan.
Extensions – Disabling and Deleting Extensions

1. Click **Company Settings** in the main menu. The Extensions Summary page displays.

To Disabled an extension:

2. Click **Enabled** on the extension you wish to disable. The Disabled Extension page displays.

3. Click **Submit** to save changes.

**NOTE**: Disabling an extension leaves the extension and all its rules in the system. You can re-activate the extension by clicking Disabled.

To Delete an extension:

4. Click the check box in the Delete column corresponding to the extension you wish to delete.

5. Click **Delete**. The warming window displays.

6. Click **OK** to continue.

**NOTE**: Deleting an extension removes the extension and all its rules from your system. You would need to rebuild all the extensions permissions and rules to recreate the extension.
Extensions – Deleting All Extensions

1. Click **Company Settings** in the main menu. The Extensions Summary page displays.

2. Click **Deactivate Extensions**. The Deactivate Multiple Extensions page opens. READ WARNING!

3. Click **Continue**. A second warning page displays.

4. Click **Submit** to save changes.

**NOTE:** Extension 0 settings will then be in effect for your non-extension account.

Deactivate Multiple Extensions

If you want to deactivate multiple extension mode and convert your account to single extension mode, please click Continue.

**Warning!** All of your extensions and any messages or greetings therein will be deleted if you convert to a single extension these greetings and messages cannot be recovered.
Messages – Listening to Voice Messages from a Telephone

1. Call your toll-free or local RingCentral number.
2. Press the star (*) key.
3. Enter your password.
4. Press the pound (#) key as soon as your service answers or as soon as it starts ringing.

**NOTE:** If you have multiple extensions, you will need to dial an extension before you attempt to login. For example, if you are logging into extension 101, you should dial your RingCentral number. Then, press 101* [password]#.

5. Press one (1) to listen to your messages. During or after listening to the message, press one of the following actions options listed on the right.
Messages – Listening to Voice Messages from the Online Panel

1. Click the **Messages** tab in the main menu. The **Messages** page displays. (The page automatically shifts to your inbox folder.)

2. Click the **Play** button to listen to the message.

3. Your PC’s media player will begin playing the message.

**Tip:** If you select RingCentral Voicemail player as your default player, you only need to hover your cursor over Play. The message will automatically play. You can find the RingCentral Voicemail player in the Download tab.

**NOTE:** The RingCentral Voicemail player only works with Internet Explorer and will not work when you use the Mozilla Firefox browser.

RingCentral stores messages in your online account for up to 30 days.

Click the check box next to the number and then an orange button on the bottom to:
- Delete the Message
- Mark the message as read
- Mark messages as unread
- Block the number
Messages – Viewing Fax Messages from the Online Panel

1. Click the **Messages** tab in the main menu. Under folders on the left panel, click **Sent Items**. (*Sent Items* folder displays.)

2. Click the **Save** icon.

3. Click **Open** in the File Download window and the fax image will be presented.

**NOTE:** Images are displayed in PDF format by default.

**Tip:** The **View** button is best used for preview only, as the image quality is not as good as clicking Save/Open.

RingCentral will store faxes in your online account for up to 30 days.

Click the check box next to the number and then an orange button on the bottom to:

- Delete the message
- Mark the message as read
- Mark messages as unread
- Block the number

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**Open**  | **To**  | **Recipient** | **Sent** | **Length** | **Save** | **Forward** | **Status** | **File Name**
--- | --- | --- | --- | --- | --- | --- | --- | ---
[View](#) | (415) 738-8002 | Fri 12/18/2009 9:22 AM | 1 page | [Send](#) | [Sent](#) | [Failed](#) | [View](#) | [View](#)
[View](#) | (888) 555-1212 | Fri 12/18/2009 9:37 AM | 1 page | [Send](#) | [Sent](#) | [Failed](#) | [View](#) | [View](#)

**File Download**

Do you want to open or save this file?

- **Name:** Message-12182009-172107.tif
- **Type:** TIFF Image, 8.10KB
- **From:** service.ringcentral.com

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. **What is the risk?**
1. Click the Messages tab in the main menu. (The Message page displays.)

2. Select the message you want to download, and click the Save icon.

3. The File download window displays.

4. Click Save (The Save As window displays). Browse to where you want to save your file on your PC, and click Save.
Account Settings – Adding a RingCentral Phone Number

1. Click **My Settings** tab in the Main Menu. (Account Summary page displays)

2. Click the **Add RingCentral Phone Number** link. (Add RingCentral Number page displays)

3. Choose the type of number you want to add to your service and complete the activation wizard.

**NOTE:**
- Your RingCentral number will be activated immediately.
- Allow up to 10 business days for Vanity numbers to be activated.
- Order a Vanity number and make it easy for customers to remember your phone number! For more information, click here.
Account Settings – Pointing a RingCentral Number Directly to an Extension

1. Click My Settings in the Main Menu. (Account Summary page displays)

2. Click the link (under the Extension column) of the phone number you want to redirect (in this example, 888 254-1743).

3. Select the extension from the drop-down list (in this example, 702 Jane Doe).

4. Click Submit to save changes. Callers will now be routed to Extension 702 when they dial 888 254 1743.
Account Settings – Changing a RingCentral Number to Receive Faxes Only

RingCentral phone numbers can be provisioned at the front end to receive:

Voice and Fax calls or Fax calls only

1. Click My Settings in the Main Menu. (Account Summary page displays)

2. Click the link (under the Type column) of the phone number you want to provision for Fax only. (Edit RingCentral Number page displays)

3. Click the Fax Only radio button.

4. Click Submit to save changes.

NOTE:
• After saving changes, the number is now provisioned for Fax only.

• The number can then be assigned to Extension 0 to give callers a fax tone once they connect. If the extension is left as “Company Greeting,” the company greeting will play for a few seconds followed immediately by the fax tones.
1. Click **My Settings** in the **Main Menu**. (Account Summary page displays and shows remaining balances of Included and Purchased Calling minutes.)

* **Included Minutes** expire at the end of the monthly billing cycle.
* **Purchased Minutes** roll-over for up to 12 months.

2. Click **Auto Purchase** to buy additional calling credit minutes. (Auto Purchase Options page displays)

3. Choose a **Calling Credits Package**, i.e., $20 (equivalent to 399 Plan) or $100 (equivalent to 1,695 Plan).

   **OR**

   Click the **Buy Now** link to immediately purchase call credits if you ran out of Included Minutes.

4. Click **Submit** to save changes.

**NOTE:**
* **Purchased Minutes** will roll over for up to 12 monthly billing periods.
* **Auto Purchase** ensures you will never run out of calling credits. The selected **Calling Credits Package** will be automatically purchased once you run low on calling credits.

*Check that your account’s **Auto Purchase** is **Active** to ensure that you will never run out of minutes, which could lead to service interruptions.*
Account Settings – Changing Your Time Zone

The call times displayed in the Call Log and Messages for both calls and faxes are adjusted for your time-zone.

Each extension can have its own time-zone setting. To change, log into that extension and follow these steps:

1. Click My Settings in the Main Menu. (Account Summary page displays)

2. Click the Regional Settings link. (Regional Settings page displays)

3. Click the Time Zone drop-down list and select your new zone.

4. Make the necessary changes in the additional fields, e.g., Formatting, Home Country Code, and Greetings Language.

5. Click Submit to save changes.

NOTE: The option to change Time Zone is not allowed for an extension if Regional Settings does not appear as a hyperlink. Contact your administrator to enable this feature.
Account Settings – Updating Your Name and Personal Information

1. Click My Settings in the Main Menu. (Account Summary page displays)

2. Click Personal Information on the ACCOUNT Panel. (Personal Information page displays)

3. Enter the necessary changes in the different fields, e.g., Name, Contact Phone Number, and Contact Email Address.

4. Click Submit to save changes.

Tip:
• Fax and FaxOut cover sheets will automatically use the name and address entered in the Contact Information table.

• Fill out the Company Name field. RingCentral’s text-to-speech technology will convert your Company Name to speech and use it in the pre-recorded Company Greeting. For example,

  “Thank you for calling ABC Company. If you know your party’s extension…”

• Although the billing name and information of the credit card must match those filed at your bank, you can use any name, including your company name, in an account or extension.
Account Settings – Changing Passwords/Security Questions

1. Click **My Settings** in the Main Menu. (Account Summary page displays)

2. Click **Personal Information** on the ACCOUNT panel. (Personal Information page displays)

3. Click **Change** button to modify your **Password** and/or **Security Question**.

   **To Change Password**: Type in your current password. Type in the new password. Type the new password again to confirm.

   **To Change Security Question**: Verify your password. Select Security Question. Type in the answer. Click **Submit**.

4. Click **Submit** to save changes.

**Tip:**
You can also change the **Password and/or Security Question** in an extension. To change, log into that extension and follow the steps for Changing Passwords/Security Questions.

**NOTE:**
- **Password** must be 5-10 digits.
- Use the same password to access your **RingCentral Voicemail** box from a telephone.
Account Settings – Changing Your Service Plan, Billing Plan or Credit Card

1. Click My Settings in the Main Menu. (Account Summary page displays)
2. Click Billing Information. (Billing Information page displays)
3. Click Change Service Plan link on the Billing Information panel. (Change Service Plan panel displays)
4. Choose the Service plan you wish to switch to, i.e., RingCentral Professional, RingCentral Power, and RingCentral Premium.
5. Click the respective drop-down box to choose Billing Plan, i.e., Monthly or Annual.
   a. Click the Payment Method link to update your credit card information.
   b. Fill in the required fields.
   c. Click Submit.
6. Click the Continue button. (Order Confirmation page displays)
7. Select the checkbox to acknowledge and accept the charge to your credit card.
8. Click the Continue button. (Thank You page opens)
9. Click the Continue button. (Overview page opens)

NOTE:
• You can upgrade or downgrade to any plan at any time.
• Your billing cycle changes and starts on the date a new Service plan is activated.
• If you downgrade plans, you will receive a credit for the unused portion of your old plan.

Tip: Get 33% savings on your bill by choosing RingCentral’s Annual Billing plan!
Account Settings – Configuring International Call Settings

*Contact RingCentral Support at 888 898 4591 to enable international calling on your account.

Configure International Call settings

1. Click My Settings in the Main Menu. (Account Summary page displays)

2. Click Calling Rates. (Calling Rates page displays)

3. Enable/disable inbound/outbound calling from Alaska, Hawaii, and Canada by clicking their respective buttons in the North America table. The per-minute extra fee is then shown.

NOTE:
• RingCentral toll-free numbers will only accept initially inbound calls from within the 48 states, contiguous United States, and Canada when you sign up.

• Enable/disable dialing to individual countries by clicking their respective buttons in the International table. You can only do this when your account is enabled for international calling.

• Callers from any country outside of the US and Canada will not be able to dial your toll-free number in most cases. Some countries may allow callers to connect to U.S.-based toll free numbers for a fee, while others may not allow callers to connect at all. In contrast, all RingCentral local numbers can accept International calls.
1. Click **My Settings** in the main menu. The Account Summary page displays.

2. Click **Forwarding Numbers** in the left menu. The Forwarding Numbers page opens.

3. Add your personal and close contact telephone numbers.

4. Click **Submit**.

5. To enter a phone number with an extension behind it, click the Edit link and enter the extension in the table. Your callers will not be connected until after the extension is dialed.

TIP: Enter all numbers you plan to use in your FindMe call forwarding list or when you use RingOut. Include close contacts to make it easy to forward calls.

TIP: If you’re on a call and want to transfer it to any of these numbers, simply dial star (*) plus the Forwarding Number’s associated Quick Dial key.
1. Click **My Settings** in the main menu. The Account Summary page displays.

2. Click **Blocked/Allowed Numbers** in the left menu. The Blocked/Allowed Numbers page opens.

3. Enter any 10-digit phone number or 3-digit area code you want to block into the Blocked list. Click Add.

4. If you choose to Block All Calls, then enter any 10-digit phone number or 3-digit area code you wish to allow into the Allowed list. Click Add.

   - You may optionally Block or Add numbers by entering a name also
   - Allowed phone number entries override Blocked phone numbers and Blocked area codes
   - Allowed area code entries override Blocked area codes
   - Allowed area code entries DO NOT override Blocked phone numbers.

5. To block Call Types from your account, Check and/or uncheck each type to your preference. You can block:
   - All calls
   - Calls from Pay Phones
   - Calls without Caller ID
   - Fax messages without Caller ID

6. Select the message you want blocked callers to hear from the Callers will hear drop-down list.

7. Click **Submit** to save changes.
Call Settings – RingOut Options

1. Click **My Settings** in the main menu. The Account Summary page opens.

2. From the left menu panel, click **RingOut Options**. The RingOut Options window opens.

   OR

3. Click the **RingOut** button in the main menu. The RingOut popup opens.

4. Click **Options** from the RingOut window. The RingOut Options window opens.

Select your preference for RingOut behavior:

- Check “Prompt me for location before dialing” and a popup window will prompt you to confirm your call.
- Check “Prompt me to dial 1 before connecting” and you will need to press 1 on your phone before connecting to destination number.
1. Click **My Settings** in the main menu. The Account Summary page options.

2. Click **RingMe Options** in the left menu. The RingMe Options page options.

3. Select the extension to which you would like send callers when they use your RingMe from the Caller will be routed to: drop down box. If you do not see this option.

4. Select the style of button you would like to use. Select a button style from the drop down list. Use See all Buttons to see the images. The choice you've made opens next to Preview and test. The html code for your selection opens in the HTML Code for Web Pages box.

5. Click the icon or text link to test your RingMe selection.

6. Select how to generate your code. You can choose html only, or With without JavaScript.

7. Copy the entire code. (Place your cursor in the box, hit control A then control C).

If you are your own Web master, use this entire string of code to add the RingMe button on your site. If you have someone else managing your Web page, send this code to them and simply let them know where on your site you would like to see the button.
Call Settings – Adding RingMe to Your Outlook Signature

1. Click My Settings in the main menu. The Account Summary page displays.

2. Click RingMe Options page displays. First, select which extension will be rung and how RingMe calls will be routed (step 3 and 4 from prior page).

3. Click Outlook Email Signature Template. The File Download Security Warning window opens.

4. Click the RingMe Email Signature Template link.

5. Click Save.

6. Browse to a location on your computer to save the file. The Desktop is recommended. (you can delete this file later).

Now you will install the code in Outlook:

7. Open Office Outlook:

8. Select Tools Options Mail Format signatures.

9. Click New in In the Create Signature window.

10. Enter a name for this signature, e.g., RingMe,

11. Select Use this file as a template.

12. Click Browse: and browse to the location of the file.

...continued on next page...
13. Click Next in the Create New Signature window.

14. Enter your custom signature information before or after the RingMe button.

15. Click Finish to save your new signature.

16. Click OK in the Create Signature window.

17. Select when Outlook should automatically use the signature in the Options window.

18. Click OK in the Options window.

19. Delete the RingMe Signature Template.htm file located on your Desktop, or keep it for future use.

**NOTE:** If you use Outlook Express, you cannot add a RingMe button to your email signature because RingMe requires true HTML support. Outlook Express only supports Rich Text format and not true HTML.
Call Settings – Using Your Own Graphics for RingMe

To use your own graphic, the file must be located somewhere on the internet. You will need to use the image’s source URL to add your graphic to your site.

1. Click **My Settings** in the main menu. The Account Summary page displays.

2. Click **RingMe Options** in the left menu. The RingMe Options page displays.

   First, select which extension will be rung and how RingMe calls will be routed (step 3 and 4 from prior page.)

3. Click **HTML Code for Web Pages**.

4. Replace the default source URL (highlighted in sample to the right) with your own graphic’s URL.

5. Add the HTML code to your Web site.

**NOTE**: Take special care not to change any other part of the code or your RingMe button will not function correctly.
1. Click **My Settings** in the main menu. The Account Summary page displays.

2. Click **Caller ID Setup** in the left menu panel. The Caller ID Setup page opens.

3. Choose which RingCentral number you wish to appear as your outbound caller ID, by feature type. For example, Jim currently uses his main number (866-224-1176) as the outbound ID. If he wanted to display his Fax number (650-472-3766) when using FaxOut or Email to Fax, he can select this fax number from the drop-down list.

4. Click **Submit** to save changes.
Call Setting – Adding Contacts Manually

1. Click **Contacts** in the main menu. The Contacts page opens.

2. Click **New Contact**.

3. Enter contact information.

4. Click **Save**.

   The contact information is now found in the Contacts tab. You can:

5. Click on the name for a pop-up information panel.

6. Click a telephone # for click to call.

7. Click on the fax number to activate the RingCentral Internet Fax panel (if you call controller software is installed on the PC)
Call Settings – Automatically Sync Your Outlook and RingCentral Contacts

Microsoft Outlook synchronization allows you to match Contacts in Microsoft Office Outlook (version 2003 and higher) with those stored in your RingCentral account Contacts directory.

RingCentral account contacts can be synchronized with multiple instances of MS Outlook (i.e., from MS Outlook contacts installed on home and office computers).

Installation:
1. When you download the Call Controller to your PC, a Contacts Synchronization window pops up.
2. Confirm your sync preferences:
   - Check box to automatically synchronize your contacts
   - Choose which folder to synchronize
   - Choose a conflict resolution rule from the drop-down list.
3. Click Next to complete the installation wizard. Your Call Controller will then begin synchronizing the two contact directories.

4. To activate synchronization at a later time, click the Menu button in the Call Controller,
5. Click Options,
6. Check the “Automatically synchronize my Contacts” box and click OK to save this setting.
Call Settings – Importing Microsoft Contacts

To import your existing Microsoft Office Contacts, you must first export your Office Outlook Contacts or Outlook Express Address Book into a “Comma Separated Values” (.CSV) file.

1. Click **Contacts** in the main menu. The Contacts page opens.

2. Click **Import**. The Import Contacts page options.

3. Browse to select the .CSV file from the location on your computer where you placed the exported .CSV file. Click Open on the selected .CSV file to load it in the Import Contacts field.

4. Click **Start Import** and complete the import.
Call Settings – Exporting Microsoft Outlook Contacts

Important Notes for Office Outlook: These instructions have been validated for Microsoft® Office Outlook® 2000 & 2003, but should be similar for other versions of Outlook. Although the Outlook Contacts folder can contain sub folders, Outlook can only export one folder at a time. You may need to create additional .CSV files for each folder you wish to export/import.

To export Microsoft Office Outlook Contacts to a .CSV file

1. Open the Contacts folder in Outlook.
2. From Outlook, click on File and then scroll to and select the Import and Export... menu item; the Import and Export Wizard dialog window will appear.
3. Select (highlight) Export to a file... and click Next; the Export to a File dialog window will appear.
4. Select (highlight) Comma Separated Values (DOS) and click Next.
5. Select the Contacts folder and click Next.
6. Choose the destination folder and create a file name to save the resulting .CSV file (e.g., C:\My Documents\MyContacts.csv) and click Next.
7. When the dialog opens with the buttons Finish and Map Custom Fields..., click Finish (usually no custom mapping is required).
8. Now, you have a file located in C:\My Documents\MyContacts.csv, which contains your Contacts list.

To export Microsoft Office Outlook Express Contacts to a .CSV file

1. Select Regional Settings (or Regional Options) from the Control Panel window.
2. In the new window, select the tab entitled Numbers.
3. Make sure “,” (comma) is checked in the List Separator field.
4. If “,” is not selected, choose or type “,” in the field provided, then click Apply.
5. Click OK.
6. From Outlook Express, click Tools, scroll to and select Address Book.... Your Address Book window will appear.
7. Click File, scroll to Export and select Other Address Book....
8. Select (highlight) Text File (Comma Separated Values)
9. Click Export.
10. Choose the destination folder and file name to save the resulting .CSV file (i.e. C:\My Documents\MyContacts.csv).
11. Click Next. The CSV Export dialog window should now appear.
12. You may check (on) or uncheck (off) any of the listed contact fields to export, but the Name field is absolutely required (or First Name and Last Name both instead Name) to import the files.
13. Click Finish to continue.
14. Click Close once the export completes.
15. Your .CSV file is located in C:\My Documents\MyContacts.csv, which contains your Contacts list.
1. Click **Contacts** in the main menu. The Contacts page opens.

2. Click **Export**. The Export Contacts page opens.

3. Click **Start Export**. A dialog box opens asking if you want to save the file.

4. Click **Save**. A Save As dialog box opens. Choose where you want to save the file.
Call Logs – Reading and Using the Call Logs (Simple View)

1. Click Call Log in the main menu. The Call Log page displays.

   All calls are logged for your retrieval. This Simple View shows the information associated with each call.

2. If you wish not to be reached again by any number, check the box associated with the log then click the button.

3. To remove any call entry, check the box associated with the log before clicking the button.

4. Return your call by using RingOut.

5. To create a new contact, click Add Contact. The Add Contact tab opens.

6. Click Create New or Update Existing as needed.

7. Download the logs to Excel.
1. Click **Call Log** in the main menu. The **Call Log** page displays.

2. Click the Detailed View. View checkbox, then **SHOW**.

   Additional information found in Detailed View includes:

3. Exactly how the call was routed, and which extensions and forwarding numbers were used.

4. The length of each call segment and the cost of the call.

**NOTE:** To see how cost is calculated for Inbound and Outbound calls, [click here.](#)
Call Logs – Examples of Detailed View Call Logs

**Example # 1:** Full VoIP Call control to a soft phone which was connected

<table>
<thead>
<tr>
<th>Type</th>
<th>From</th>
<th>To</th>
<th>Extension</th>
<th>Forwarded To</th>
<th>Name</th>
<th>Location</th>
<th>Date / Time</th>
<th>Action</th>
<th>Result</th>
<th>Length</th>
<th>Included</th>
<th>Purchased</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice</td>
<td>(888) 555-1212</td>
<td>John Doe</td>
<td></td>
<td></td>
<td>John Doe</td>
<td>Dir Asst, CA</td>
<td>Yesterday 8:58 PM</td>
<td>RingOut Web</td>
<td>No Answer</td>
<td>0:00</td>
<td>$0.00</td>
<td>-</td>
</tr>
<tr>
<td>Voice</td>
<td>(888) 555-1212</td>
<td>John Doe</td>
<td></td>
<td></td>
<td>John Doe</td>
<td>Dir Asst, CA</td>
<td>Yesterday 8:58 PM</td>
<td>RingOut Web</td>
<td>No Answer</td>
<td>0:00</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Voice</td>
<td>SoftPhone</td>
<td>(888) 252-9535</td>
<td>John Doe</td>
<td></td>
<td>Add Contact</td>
<td></td>
<td>Mon 12/21/2009 11:35 AM</td>
<td>VolP Call</td>
<td>Cal connected 0:10</td>
<td>$0.00</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Voice</td>
<td>SoftPhone</td>
<td>(877) 293-2371</td>
<td>John Doe</td>
<td></td>
<td>Add Contact</td>
<td></td>
<td>Mon 12/21/2009 11:34 AM</td>
<td>VolP Call</td>
<td>Cal connected 0:04</td>
<td>$0.00</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

1. John Doe places a VOIP call on number 888-252-9535 at 11:35am, and was connected
2. Total duration of the call was 10 seconds

**Example # 2:** Full FAX transmission

1. John Doe sends a Fax to DJ TurnStylz on number 415-738-8002 at 4:07pm, and was connected.
2. John Doe sends again another Fax to DJ TurnStylz on same number at 5:21pm, and also succeeded.
3. Both transmissions were respectively billed.

**NOTE:** For more examples of Detailed Call Logs, [CLICK HERE.](#)
1. Click **Call Log** in the main menu. The **Call Log** page displays.

2. Click **Delivery Settings**. The E-mail delivery schedule pop up window displays.

3. Select the e-mail delivery frequency.

4. Choose send log type.

5. Enter the e-mail address to which the Call Logs are to be delivered.

6. Click **Submit** to save changes.

**NOTE**: If you have extensions and want records for just one extension, first log in to that extension. Then go to Step 1 above.

Logs will be delivered in Excel format.
On Call Actions – Putting Call on Hold and Transferring a Call

1. To Put a call on Hold:
   1. During any call, press pound, pound (##) to place your caller on hold. You will hear a voice prompt saying, “You have a call on hold.”
   2. To resume the call, press pound (#).

2. To Transfer a Call:

   To another extension:
   1. From your phone, press pound, pound (##).
   2. Enter the extension number of the place where your caller is to be transferred. (For example, 101).
   3. Your caller will be immediately transferred and you can hang up.

   To another phone number:
   1. From your phone, press pound, pound (##).
   2. Press star (*) for more options.
   3. Press 1 to transfer to another number.
   4. Enter the number.
   5. Press pound (#).
   6. Hang up to complete the transfer.

   Transfer to a quick dial number:
   1. From your phone, press star (*).
   2. Dial the quick dial number. (For example, 1)
   3. Hang up to complete the transfer.

NOTE: With IP Phones, please utilize either ## or soft keys associated with the devices (i.e. Hold and Transfer buttons) for these features.
On Call Actions – Using the Virtual Calling Card

1. Dial your main or local RongCentral number.

2. Press the star (*) key.

3. Enter your password.

4. Press the pound (#) key. If you are using an extension, dial your extension number during the Company greeting.

5. Press 3 to make a call.

6. Dial the number, then press the pound (#) key.

The RingCentral server will then connect you to your party.
Faxing – Sending a Fax Online Using FaxOut

1. Click FaxOut tab in the Main Menu. (FaxOut – Fax from Web window displays)
2. Enter the 10-digit Fax Machine Telephone Number in the Fax Number field.
3. Click Add to post the fax number in the list box. (Repeat Steps 2 and 3 to add more fax numbers)
4. Click the Add Attachment link. (A status bar displays)
5. Browse to the file you wish to fax. Highlight and click Open.
6. Click Add. (Repeat Steps 4 to 6 to attach more documents)
7. Click the Use Cover Page checkbox to include a Cover Page. Choose from several Cover Page styles (Contempo is the default Cover Page style)
8. Click the Send now radio button (to immediately send the fax) or Schedule radio button (to send the fax at a later time/date).
9. Click SEND FAX. Your document will:

• be sent to RingCentral via the Internet
• be processed in RingCentral’s servers
• RingCentral will fax the document to your party
• Image of fax record will be stored in your Message tab for 30 days.

Tip:
• Click the Contacts link to add a fax machine number listed in your RingCentral contacts book.
• FaxOut or Email to Fax supports more than 50 file types, e.g., JPEG, pdf, psd, ppt, wpg, and rtf. Click here for the entire list.
Faxing – Sending a Fax by Email

1. Create an e-mail message using your e-mail application.

2. Type your recipient’s fax machine number in the To: field, followed by @rcfax.com, e.g., 4045557655@rcfax.com).

3. Type your Cover Page note into the Subject field.

4. Attach the fax document(s) to your e-mail.

5. Click Send.

NOTE:

- Text entered into the body will not show up on the fax.
- For more details on sending faxes via e-mail, click here.
Faxing – Adding a Document to a Fax From Microsoft Applications

1. Open the document you want to add to a fax.
2. Click the **Send to Fax** button under the **RingCentral** toolbar in your Microsoft application. The document will be automatically printed to your **Open Fax** as an attachment.
3. Enter the recipient’s name (optional) and the 10-digit Fax Machine Number(s).
4. Click **Add** button to add the number to the Send list.
5. Click **Attach** if you want to load a second document to fax.
6. Place mouse cursor over the document icon to preview the document.
7. Type your **Cover Page** message. Or uncheck the **Use Cover Page** checkbox if you do not want to send a cover page.
8. Click **Send** (to immediately send the fax) or **Schedule** (to send the fax at a later time/date).

**NOTE:**

- The **RingCentral Internet Fax** program must be open for your document to be added as a fax attachment from a Microsoft application.
- The **Call Controller** with **SoftPhone** must be installed on your computer for the **Fax** icon to be imbedded in Microsoft Applications.

**Tip:**

- For instructions on how to send faxes using the **Call Controller**, [click here](#).
Faxing – Cancelling a Fax
Scheduled to be Sent

1. Click Messages tab in the Main Menu. (Messages window displays)

2. Click Outbox in the FOLDERS panel. (Outbox window displays)

3. Click the checkbox(es) of the pending fax(es) you want to cancel.

4. Click DELETE.

NOTE:

• You cannot reschedule faxes that have already been queued to your Outbox.