

RingCentral Office[®]

New User Setup



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Welcome to RingCentral

Welcome to the RingCentral business phone system! If this is your first time logging in, you'll need to activate your RingCentral account.

It will take about 15 minutes to set up your account. You will be asked to verify your extension details, set your password, select a security question & answer, set or import your voicemail greeting, and confirm your emergency location.

Note: *If you leave the Express Setup without finishing, the changes you have made may not be saved.*

You can [learn more](#) about user features through [Knowledgebase articles](#) and the [RingCentral Office User Guide](#).

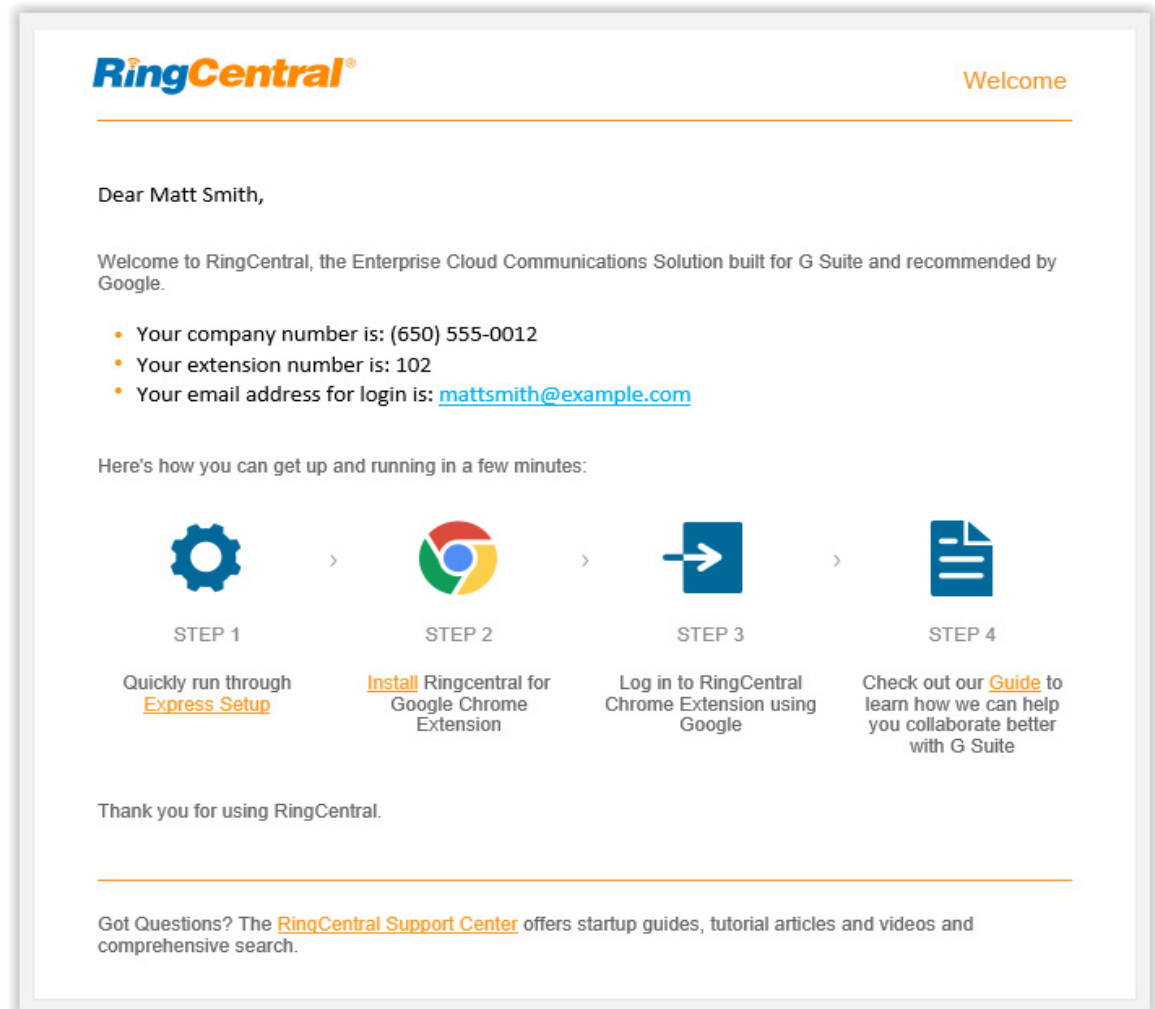
Activate Your Account

You will see this Welcome Email after your administrator has enabled your account for setup. In this email, you will receive your company phone number and extension (if applicable). The email also indicates whether your account is enabled for login using your Google credentials (if any).

To start your setup,

1. **Open the email message.**
The Welcome message appears.
2. To begin your set up, do one of the following:
 - Click **Set up Account**
 - Copy the link into your browser

The setup instructions continue on the following page.



Your Account Security

After clicking **Activate Account**, a window opens for you to enter three account security settings:

- Your password
- Your pin
- Your security question & answer

Passwords and Security Questions on your online account maintain your account's confidentiality and privacy. The PIN is used to verify your identity when checking voicemail or is requested by the automated attendant when contacting Customer Care.

Follow the on-screen prompts. For each security setting, certain requirements must be met. For your convenience, these requirements are listed next to the setting as you enter the information.

Note: If your extension is configured as a Google tagged account by your administrator, your Express Setup will have different setup options.

3. Create your **Password**.
Follow the requirements listed next to the **Password** and **Confirm Password** fields. A green check mark indicates when you have met a requirement.
4. After you **Confirm Password**, press **Continue**.

Your Account Security

1

Login

Use to login to your account

Password:

Letter, number, special character, min 8 characters, no spaces

Confirm Password:

Please input the password again

Continue

2 Create PIN

3 Security Question and Answer

Password Criteria

- At least one letter (latin character)
- At least one number (0-9)
- Non-sequential, Non-repeating
- No account information
- One upper case letter or special character (!,@,\$,#)
- Length 8-32 characters


The next step in **Your Account Security** is to set your PIN.


5. Create your **PIN**.

Follow the requirements listed next to the **PIN** fields. A green check mark indicates when you have met a requirement.


You'll need this PIN when contacting Customer Care or when checking voicemail.


6. Press **Continue**.



Your Account Security

 Login

2 Create PIN
Used to check your voicemail messages via the phone





 **PIN:**

 **Confirm PIN:**

 Continue

3 Security Question and Answer


Pin Criteria

-  Only digits
-  Non repeating
-  Non sequential
-  Length 6-10 digits

The last step in **Your Account Security** is to select a **Security Question and Answer**.

Note: You will be asked for your **Security Question and Answer** each time you contact RingCentral Support. Keep a record of the question and answer for future reference.

7. Select one of the questions listed in the **Security Question and Answer** menu.
8. Enter your answer to the security **Question** in the **Answer** field.
Note: Your answer must be at least 4 letters.
9. Press **Continue**.


Your Account Security

✓ Login

✓ Create PIN

3 Security Question and Answer
Used to reset your password or to identify your account when contacting customer service

Question:

Answer:

Please select one

Please select one

What was your childhood nickname?

What is the middle name of your youngest child?

What is your oldest sibling's middle name?

What school did you attend for sixth grade?

What are the last 5 digits of your driver's license number?

What was your high school mascot?

What was your dream job as a child?

What is the country of your ultimate dream vacation?

What is your pet's name?

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Quickly Get Up and Running


The next two steps include reviewing your **User Info** and specifying **Call Handling** for incoming calls to your new number.


Review Your User Profile

1. Click **STEP 1**.
Review your user profile.

Welcome to RingCentral


Complete these two easy steps to quickly set up your phone.


STEP 1



User Info
Review your user profile

STEP 2



Call Handling
Specify how you would like to handle incoming calls to your new number

Your **User Info** appears in a separate window.

2. Verify that your information is correct. If not, update your name or corporate email address.
 - The name shown in your **User Info** will appear in your corporate directory for others in your company to contact you
 - Select **Use email to log in** to enable login to your account using a unique corporate email address.
 - Email functions only if your email address is unique in all RingCentral accounts.
3. Click **Continue**.

User Info Call Handling

Review your contact information to get started

1 **User Info**

Company Number: (650) 555-0012

Extension Number: 102

Direct Number: — (650) 555-0012 —

Use email to log in

Now check or reset your **Regional Settings**.

1. Verify **Regional Settings** specified for your account. These are: **Country, Time Format, and Time Zone.**
2. Click **Continue.**

The screenshot shows a setup interface with two tabs: 'User Info' (active) and 'Call Handling'. Below the tabs is the heading 'Review your contact information to get started'. The 'User Info' section is marked with a green checkmark. The 'Regional Settings' section is marked with a '2' in a circle and contains the following fields:

- Country: United States (1) [dropdown arrow]
- Time Format: 12h (AM/PM) 24h
- Time Zone: (GMT-08:00) Pacific Time (US & Cana... [dropdown arrow]

A green 'Continue' button is located at the bottom of the 'Regional Settings' section.

Now check or reset your **Emergency Calling - Registered Location**.

The **Emergency Calling - Registered Location** is the physical location of your phone that is using the RingCentral Digital Line. Emergency dispatchers (Emergency Call Service) will send first responders to this exact location.

Important: You must provide a proper address or you will not be able to place calls using this number. Verify that your administrator updates this address every time you move your phone to a different physical location. If your administrator does not update this, emergency calls may not be routed to the appropriate responder for your current location.

1. Set the **Emergency Calling - Registered Location** for your account.
 - Enter your name
 - Enter your country
 - Enter your address
 - Enter your state
 - Enter your postal zip code
2. Read the agreement describing **Emergency Calling - Registered Location**.
3. Click **Agree and Continue**.

3 Emergency Calling - Registered Location

Emergency Service dispatchers will send emergency first responders to this exact location. Where will you be using this phone?

Important: You must update this address every time you move your RingCentral IP phone or Emergency Dialing-Enabled Softphone to a different location. You may update the Registered Address at any time through <http://service.ringcentral.com>. Please note that it may take several hours for any address update to take effect.

Emergency calling may not be available in the event of an Internet or power outage, or if your broadband, ISP, or RingCentral Office service fails or becomes overloaded. VoIP emergency calls may not connect to your local emergency operators, may not transmit your location information, or may improperly ring to an administrative line. It is strongly recommended that you have an alternative means for placing emergency calls available at all times.

By clicking "Agree and Continue", I agree to the [Emergency Service Terms and Conditions](#).

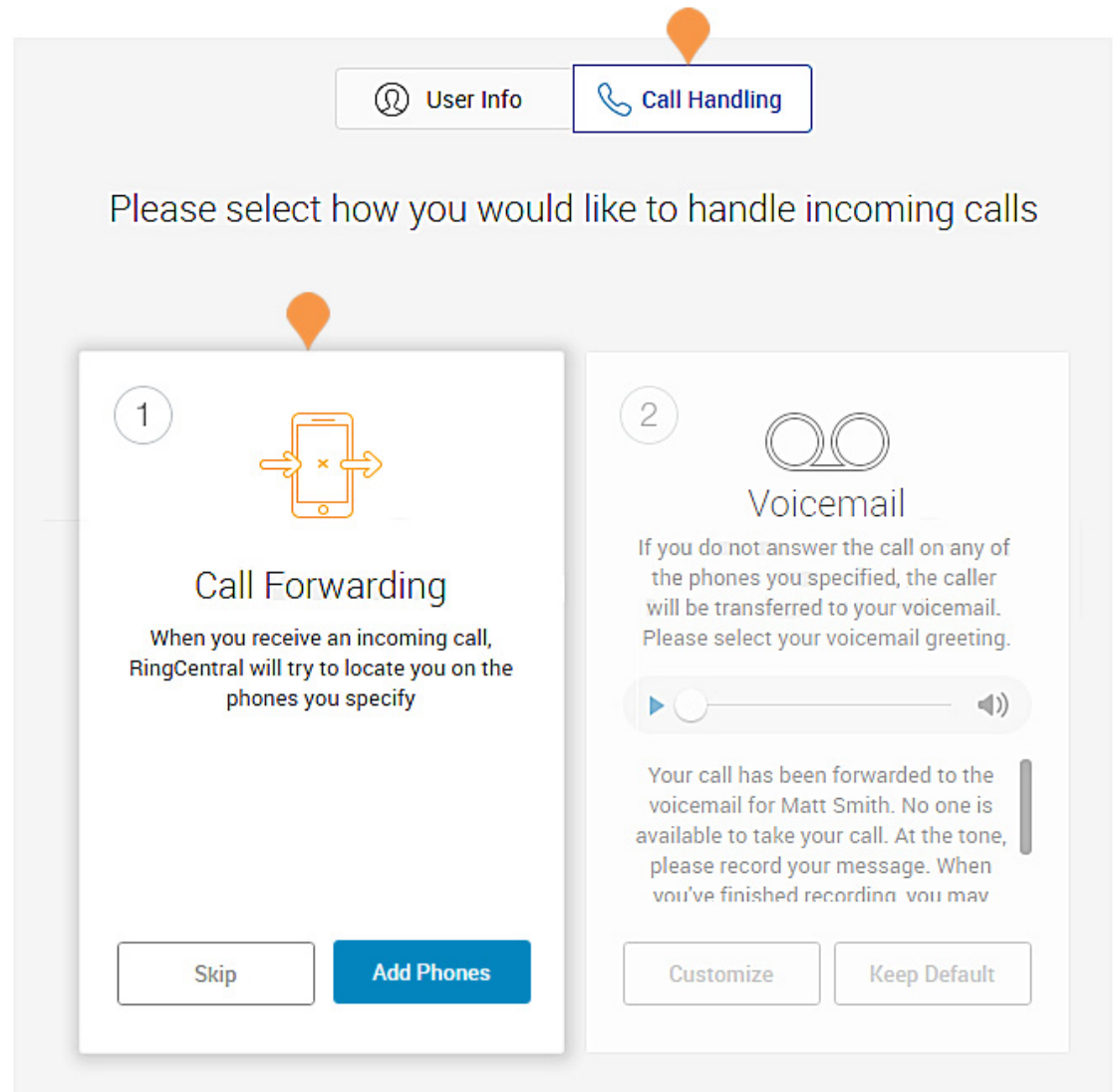
Agree and Continue

Call Handling

As a user, you can set up call forwarding rules for your extension. You can add up to 10 forwarding numbers for each extension assigned to you and set calls to ring sequentially or simultaneously.

In this step you'll enable call forwarding to another number. First, note the phone extensions to which you might want to forward your calls.

1. You can either skip this step or set your phone to route your calls to another phone. To omit this step, click **Skip**. Then go to "Voicemail Setup" on page 14.
 - To add a device for call forwarding, click **Add Phones**.



- To add desk phones to which you can forward calls, click **Add Devices**.

User Info Call Handling

Please select how you would like to handle incoming calls

< Call Forwarding

Your Phone system administrator ordered a desk phone for you. Would you like to add other devices to receive and make calls?

Desk Phone:

RingCentral Phone
(Polycom VVX311)

Just Ring My Desk Phone Add Devices

Select additional devices (if any) you would like to ring when you receive an incoming call to your business number.

2. Select the type of phone to which the forwarded call will be sent.
3. Enter the number of the selected phone. Continue adding phones, as needed.
4. Click **Next**.

The setup instructions continue on the following page.

User Info Call Handling

Please select how you would like to handle incoming calls

Phone Numbers 1 of 2

Please select which additional devices you would like to ring when you receive an incoming call to your business number.

Polycom VVX311 (650) 555-0012

Select Phone Enter Number

+ Add Additional Phones

Next

5. Select whether the forwarded phones ring **Simultaneously** or **Sequentially**.
 - Select **Simultaneously** if you prefer the call to ring on all forwarded phones at the same time. Because of different networks, ringing to some devices, such as mobile devices may be delayed.
 - Select **Sequentially** if you prefer the call to ring on forwarded phones in a sequential order. Arrange the forwarding order by dragging up or down.
6. Click **Save**.

User Info Call Handling

Please select how you would like to handle incoming calls

Call Handling 2 of 2

Which order would you like your devices to ring when you get an incoming call to your business number?

Simultaneously Sequentially

1 Polycom VVX311 (707) 387-4938

2 Home +1 (650) 5550012

Save

Voicemail Setup

Now, set up the message your callers will hear when RingCentral forwards your calls to Voicemail.

You can choose the default voicemail greeting “**Keep Defaults**” or you can select “**Customize**” to record or import your greeting. See the default greeting text shown below the playback button.

Changing the Voicemail Greeting

The next two pages explain how to keep the default voicemail greeting, or create a custom greeting by recording over the phone or importing a file.

To keep the default greeting, follow these steps:

7. Click **Keep Default**.

Please select how you would like to handle incoming calls

Call Forwarding

When you receive an incoming call, RingCentral will try to locate you on the phones you specify

[Change](#)

2 Voicemail

If you do not answer the call on any of the phones you specified, the caller will be transferred to your voicemail. Please select your voicemail greeting.

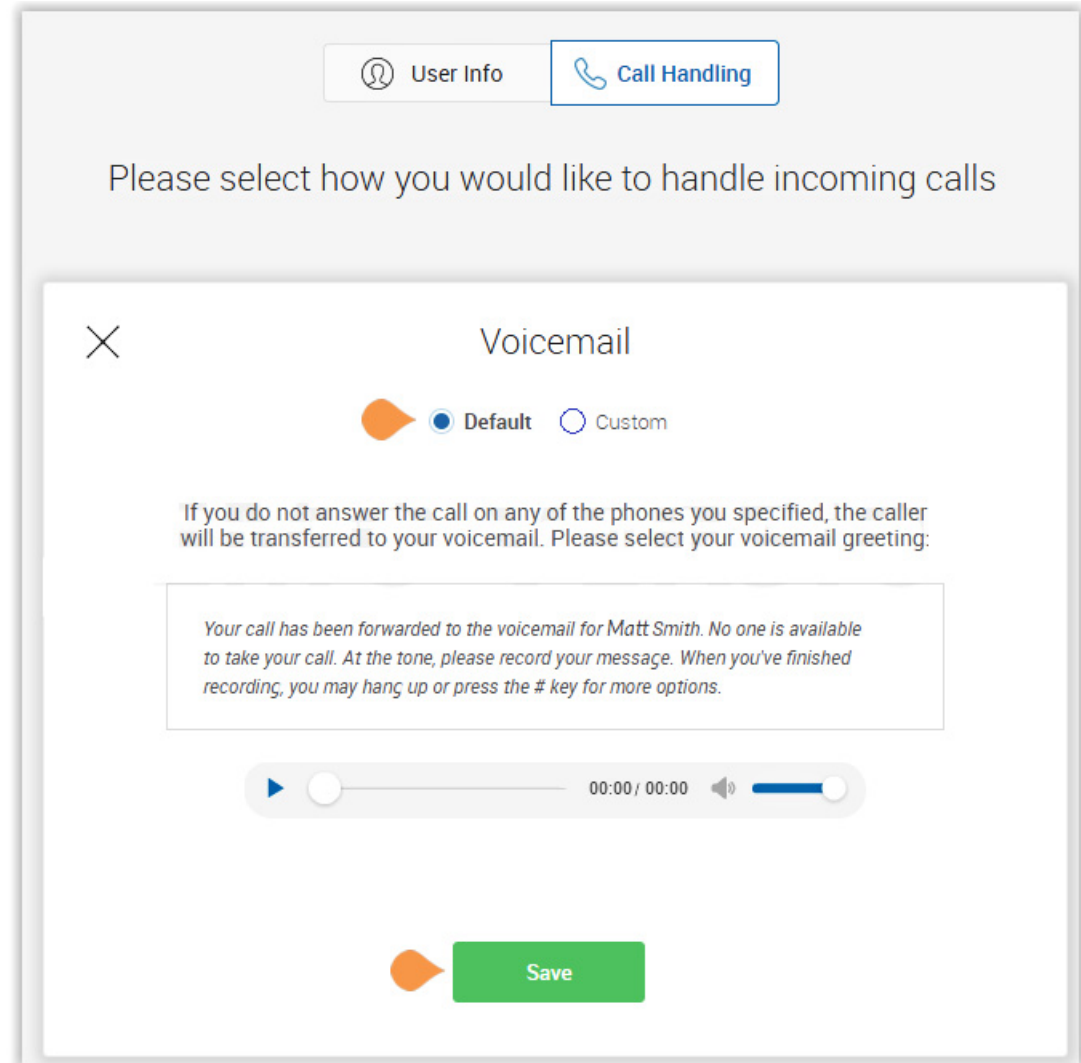
▶ ◀

Your call has been forwarded to the voicemail for Matt Smith. No one is available to take your call. At the tone, please record your message. When you've finished recording you may

[Customize](#)
[Keep Default](#)

To keep the default, follow these steps:

8. Click **Save** and skip to “Click Finish Setup” page 16.



To RECORD OVER THE PHONE or Import a Custom Greeting

9. To record or import a new greeting, click **Custom**.

You can record your greeting over the phone, or you can import a custom greeting.

- To record your message over the phone, click **RECORD OVER THE PHONE**, enter a number in **Call me at** field and click **Call**.
- To import a previously recorded message, click **IMPORT** and follow the instructions. (Use an .mp3 or .wav formatted file.)

10. Click **Save**.

You're almost done! The next steps are on the following pages.

User Info Call Handling

Please select how you would like to handle incoming calls

Voicemail

Default Custom

RECORD OVER THE PHONE IMPORT

RingCentral will call you to record your custom greeting over the phone.

Call me at: Phone Number Call

00:00 / 00:00

Save

11. Click **Finish Setup**.

The screenshot displays the RingCentral user setup interface, which is divided into three main configuration panels, each with a green checkmark in the top-left corner indicating successful completion:

- User Info:** Features a user profile icon. The details listed are:
 - Name: Pamela Smith
 - Company: (650) 555-0012
 - Ext: 103
 - Direct: (650) 555-0012A "Change" button is located at the bottom of this panel.
- Call Forwarding:** Features a mobile phone icon with a call arrow. The forwarding is set to "Sequentially". The destinations are:
 - Polycom VVX311 (650) 555-0012
 - Home (650) 555-0012A "Change" button is located at the bottom of this panel.
- Voicemail:** Features a voicemail icon. The setting is "Custom". A play button icon is shown above the text "[Custom Recording]". A "Change" button is located at the bottom of this panel.

At the bottom center of the entire setup area, there is a blue button with an orange arrow pointing right, labeled "Finish Setup".

Use RingCentral Anywhere

Collaborate with co-workers and manage your phone system from any device. Apps are available for download that expand your ability to collaborate with others using the RingCentral applications.

- For more information about apps you can use with RingCentral Office, see the [RingCentral Office User Guide](#).
- To download apps from the RingCentral website, see [Downloads](#).

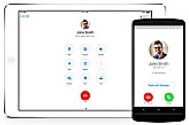
12. Click **Finish**.

Continue to the following page.

Use RingCentral Anywhere

Collaborate with coworkers and manage your phone system from any device

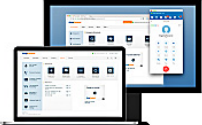
Free Smartphone App
Accessibility away from your desk



App for iPhone


App for Android

Free Desktop App
Accessibility on your computer



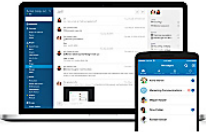
RingCentral for Windows

RingCentral for Google
Productivity and communication from your Chrome browser




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Glip Messaging
Collaborate anywhere:
Free messaging and file sharing app
RingCentral Glip included with your service



Find more at glip.com

RingCentral meetings
Connect. Meet. Collaborate.



Download RingCentral for Windows

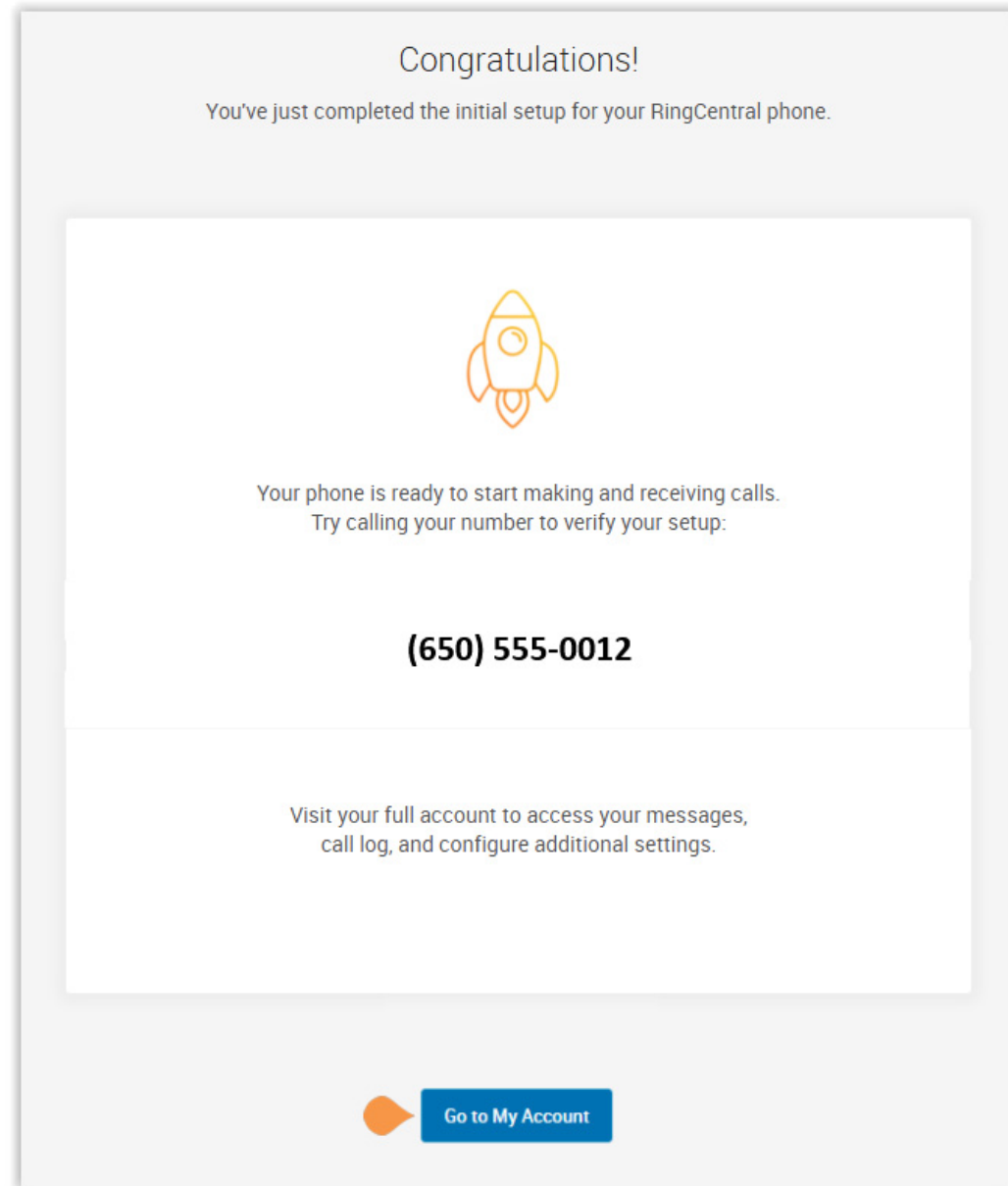
Finish

Congratulations!

You have completed the initial setup of your RingCentral business phone system.

13. Note the phone number shown on the **Congratulations** screen.
14. Click **Go to My Account**.

In the following pages, you'll log in to your RingCentral account.



Overview Page

Your RingCentral Office Overview page opens. Take a short tour of your Overview page.

1. **Overview** page is your dashboard to the RingCentral system.
2. **Recent Messages** and **Recent Calls** lists your recent incoming and outgoing messages and calls.
3. **Shortcuts** are menus to frequently accessed settings.
4. **Announcements** lists messages from RingCentral.
5. **Resources** provides quick access to Community, Blog, and Feedback. Go to Feedback to report an issue with RingCentral Customer Care.
6. **Get Help** lets you find answers to most of your questions, request Support, see service status messages, or toggle on/off feature tips.

To Find Information About

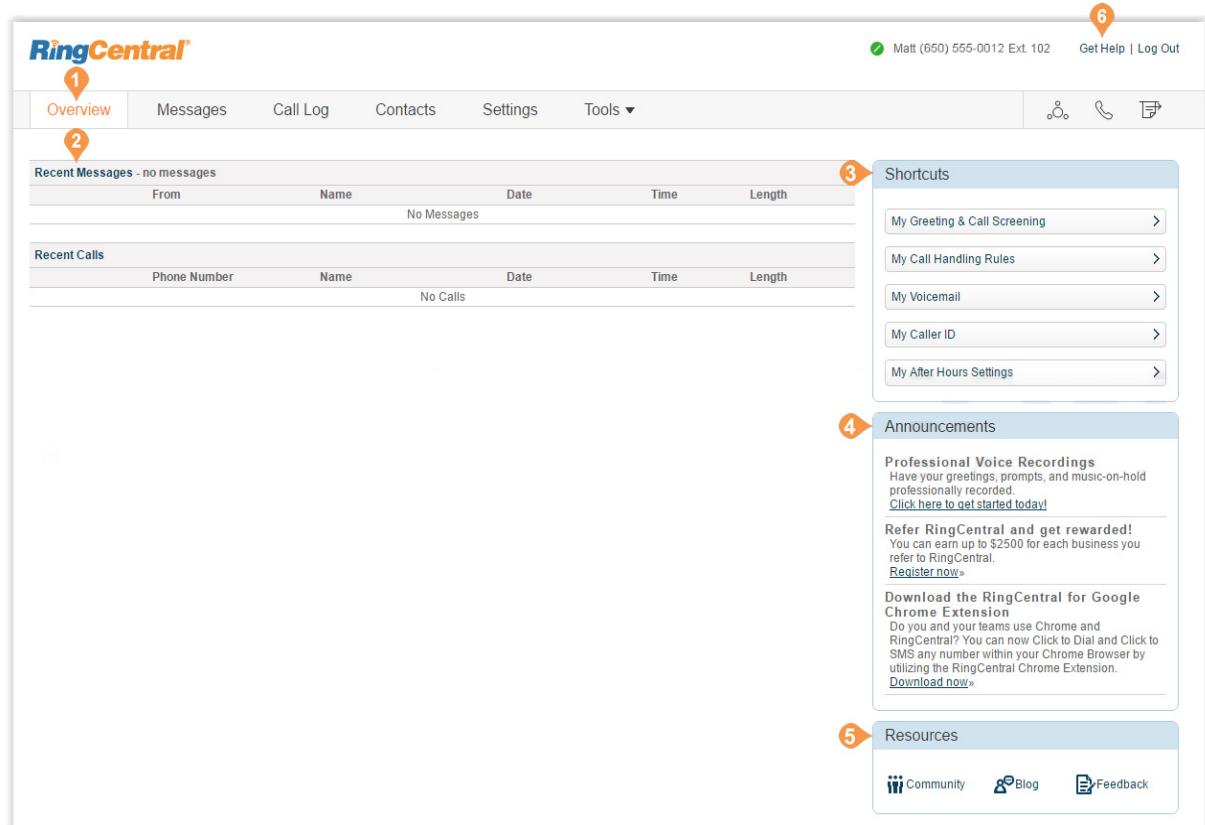
- Your **User Details**, click the **Settings** tab.
- The **RingCentral Office User Guide**, click [here](#).
- Support **Videos**, click [here](#).

Knowledgebase Articles

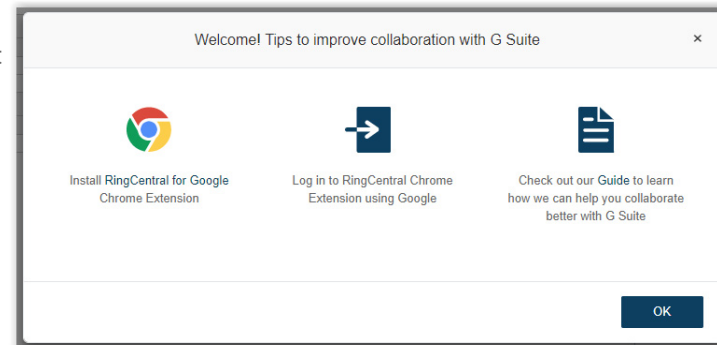
For further instructions on these subjects:

- [Sign in](#)
- [Changing your password](#)
- [Call Handling](#)
- [Emergency Calling - Registered Location](#)
- [Voicemail Greetings](#)

Continue to the following page.



You may also see information about these available applications.



While You are Using RingCentral Products

We're happy you have selected RingCentral for your business communication needs. RingCentral provides a variety of ways for you to learn more about our service.

[Attend a Training Webinar](#)

Designed for both administrators and users, these sessions will give you the best practices, power-user tips, how to instructions and other valuable information on your RingCentral system [View our upcoming scheduled Customer Training Webinars](#).

[Post in the RingCentral Community](#)

Share your ideas and feedback, get your problems solved, and give back by helping others! See [RingCentral Community](#).

[Download Applications](#)

Wherever you go, RingCentral follows. Download our applications for your computer and smartphone to receive business calls on your mobile phone. [Download Now](#).