RingCentral Office at Hand from AT&T

Admin Guide

RingCentral

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Getting Started

Introduction

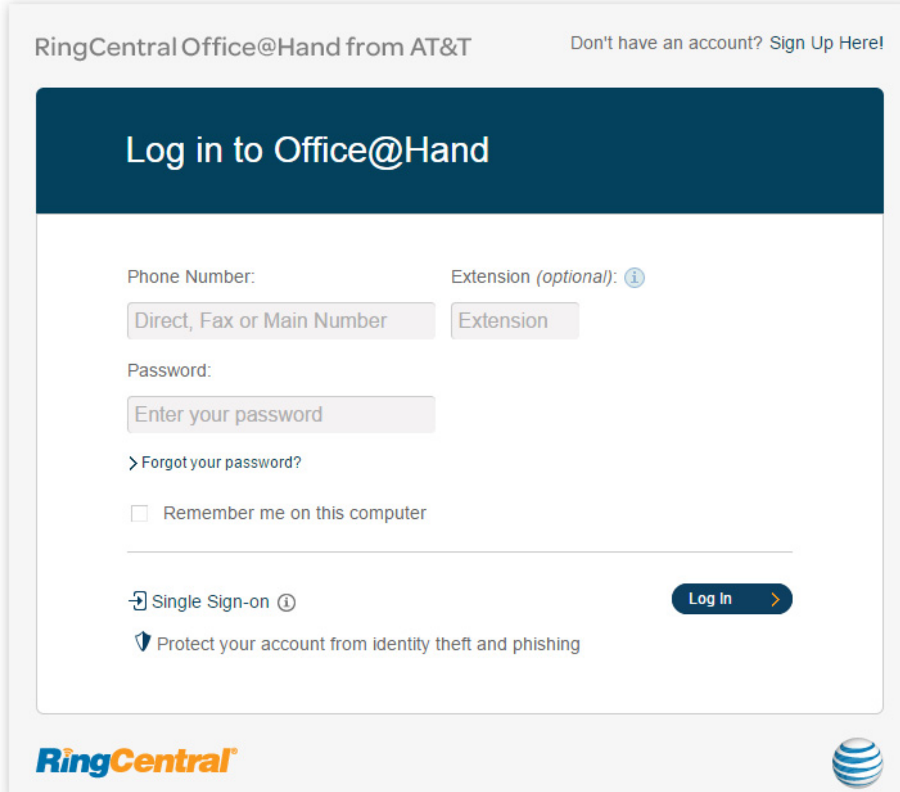
RingCentral Office@Hand from AT&T is a business phone system that connects employees with one solution. It offers enterprise-grade features, including auto receptionist, multiple extensions, and more.

This guide will help system administrators set up and access the following Office@Hand features:

- Auto-Receptionist
- Multi-level IVR (Auto-Attendant)
- Visual IVR Editor
- Company directory
- Company numbers
- Call groups
- Presence
- Call queues
- Call monitoring
- Call handling and forwarding
- Call recording on demand and automatic
- Audio conferencing
- Paging
- Hot Desking
- Reports
- Roles and Permissions
- User Groups
- Templates
- Multi-Account Access
- Corporate email as user ID
- Gmail (or G Suite) email as user ID
- Single sign-on

How to Access Your Account

If you have created but not set up your administrator account, see Appendix A: Express Setup for Admins to learn how to set up your account first. Log in to your online account at https://service-officeathand.att.com/ .The default method of account access is by using your main Office@Hand phone number and password.



Email or Google as User ID

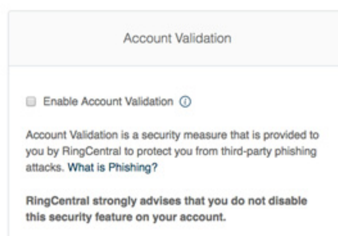
You may optionally configure users to log in with a unique corporate email address or Google (Gmail or G Suite) account. See Use a Corporate Email Address to Log In and Use a Google Account to Log In.

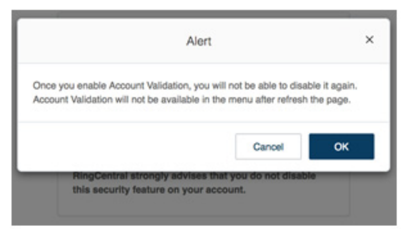
Single Sign-on

If Single Sign-on is set up for your account, click **Single Sign-on** at the bottom of the screen. Enter your email address on the following screen, then log in with your corporate credentials. See Single Sign-on* in the Tools section of this guide.

Account Validation

Account Validation is a security feature that helps protect against fraudulent activity on your account. You will be asked for a security validation code when you log in from a new or unrecognized computer for the first time. Depending on your account settings, you will need to check your phone or email for the security code and enter it in the box before logging in.





Use a Corporate Email Address to Log In

The Email as User ID feature allows users to log in using a unique email address. When users log in to an account, they receive a notification about the feature, and can enable the feature by specifying a unique email address.

This feature applies to accessing your Office@Hand online account, Office@Hand from AT&T Meetings, endpoints such as the Office@Hand Mobile App and Office@Hand for Desktop, integration applications, and the Multiple Account Access portal. This feature can also be configured during Express Setup of your Office@Hand account.

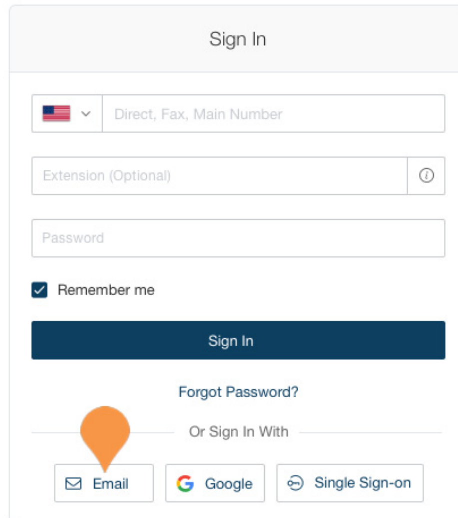
For information on automatically provisioning users from your corporate directory, see “Directory Integration ” on page 184.

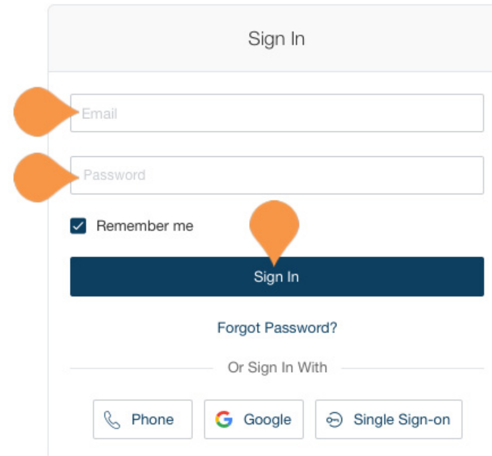
If not already configured, enable the feature:

1. Log into your account using RingCentral credentials.
2. Enable the feature as follows:
   a. In the email popup, select **Enable now**, and click **OK**.
   b. Or, in **User Settings**, select **Use email to log in**.
3. Verify the uniqueness of the email address.
4. Edit any duplicate email addresses.
5. Click **Save** and log out.

To Log In using Email as User ID:

1. In the login screen, click **Email**.
2. Enter the unique Email address and Password that has been associated with your Office@Hand account.





Use a Google Account to Log In

The Google login feature allows 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 Office@Hand credentials.

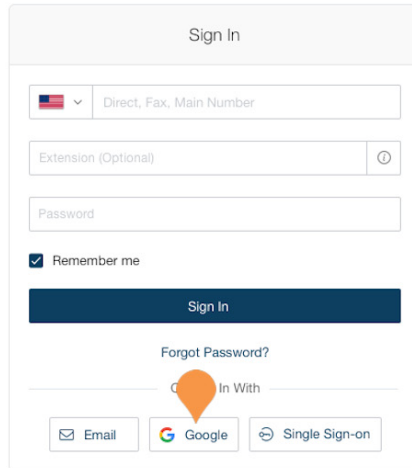
This feature applies to accessing your Office@Hand online account, Office@Hand from AT&T Meetings, endpoints such as the Office@Hand Mobile App and Office@Hand for Desktop, integration applications, and the Multiple Account Access portal. You can configure Google Email addresses during the Express Setup of your Office@Hand account.

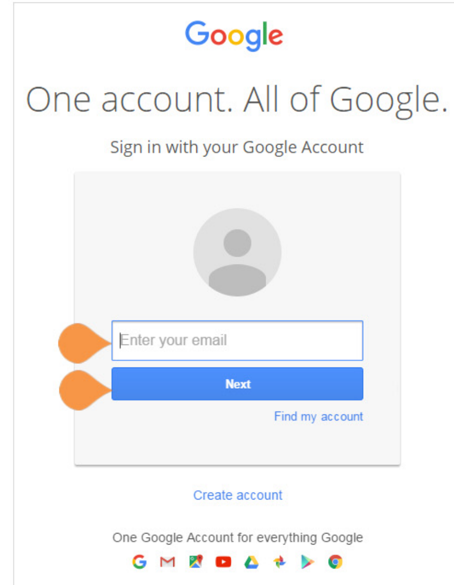
If not already configured, set a Google email address.

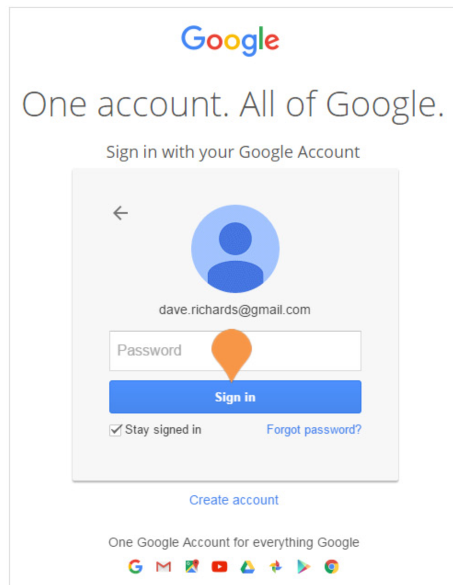
1. Log in using your Office@Hand credentials.
2. Select **Users**.
3. Select a user. The user settings page is displayed.
4. In the **Email** field, specify a unique email address.
5. Click **Verify email uniqueness**; resolve duplicates.
6. Click **Save** and log out.

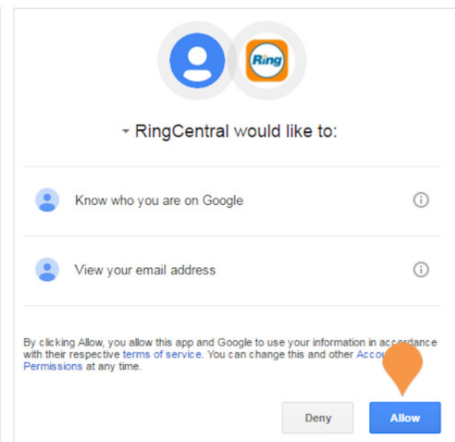
To Log In using Google:

1. In the login screen, click **Google**.
2. Enter your unique Gmail **Email** address and **Password**.
3. Edit any duplicate email addresses.
4. Click **Allow** to allow the application access.







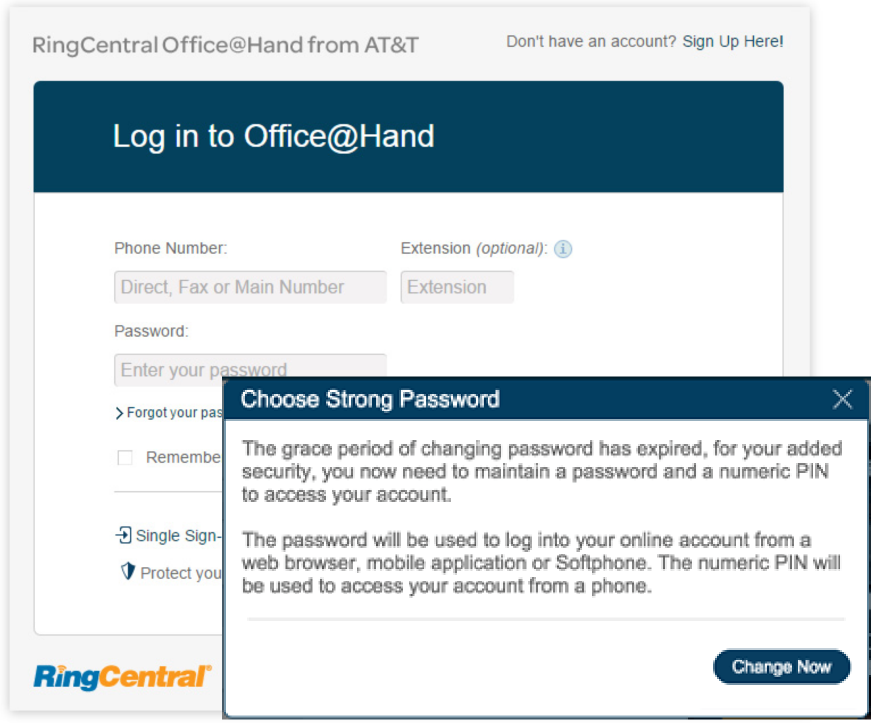


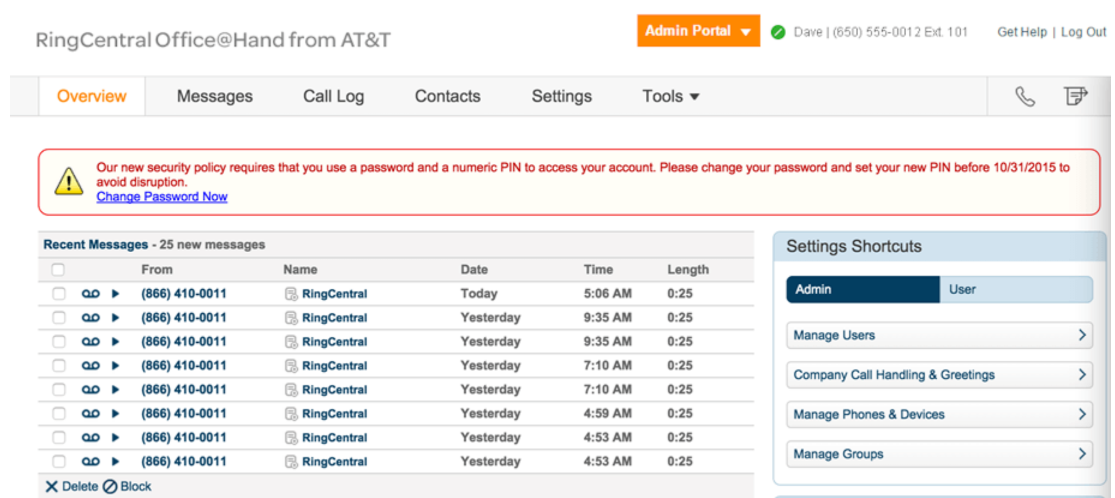
Alphanumeric Password

The alphanumeric password feature enhances the RingCentral Office@Hand from AT&T security policy that requires users with a numeric password to switch to an alphanumeric password to provide a more secure password for online access that is difficult to crack or guess. Users with a numeric password receive an alert message when they attempt to log into their online account.

Grace Period

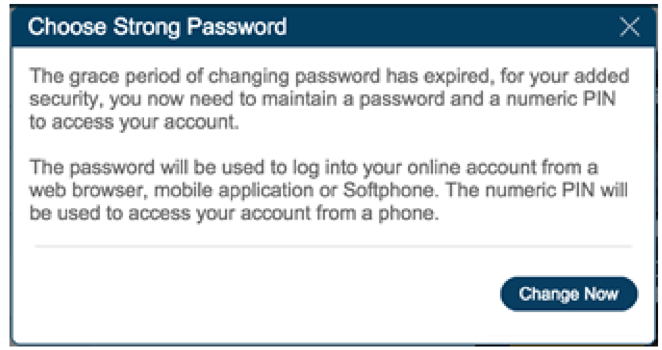
During the grace period, you are prompted to change your password by selecting Change Now, or change it later by selecting **Change Later**. A warning message in the Overview page provides a deadline for the change.





Grace Period Expiration

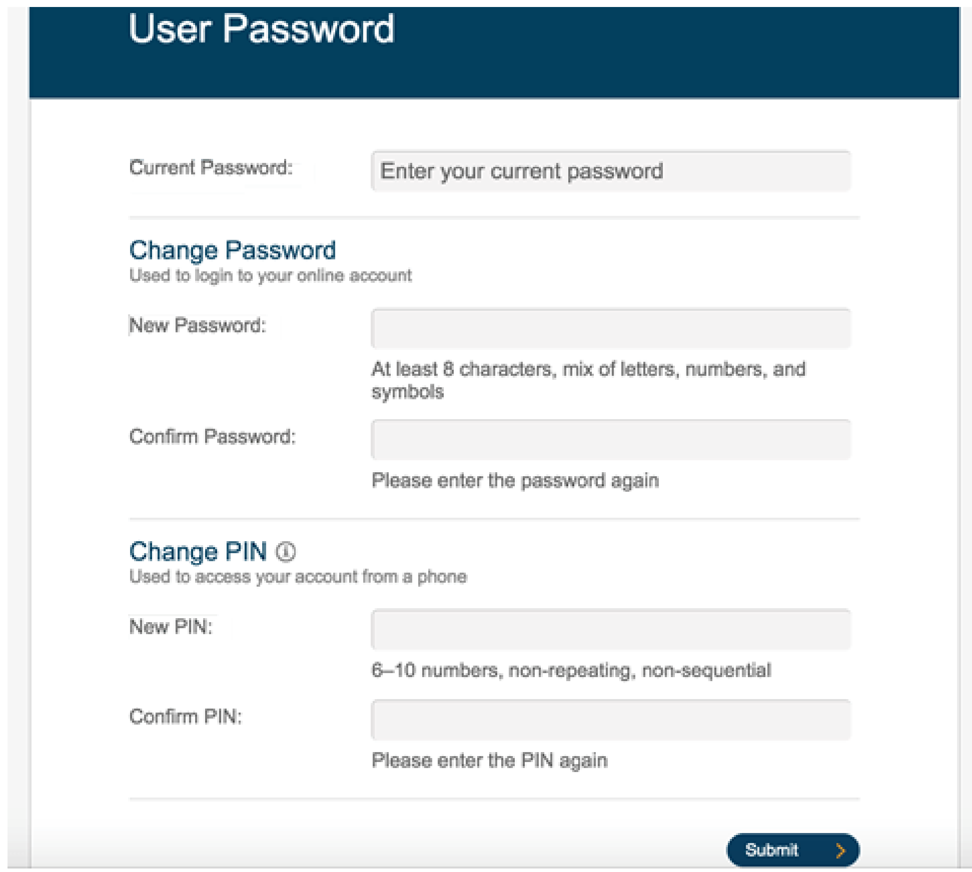
Once the grace period expires, you are prevented from logging into your online account.



Changing Your Password |

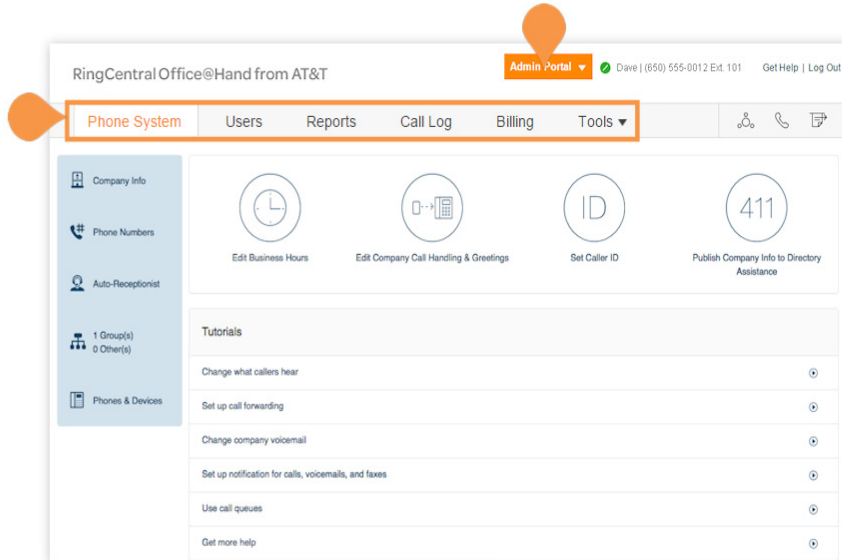
To change the password:

1. Select **Change Now** in the Choose Strong Password dialog, or from the Overview page select the **Change Password Now** link.
2. Enter your current password, then enter a new password of at least 8 characters, with a mix of letters, numbers, and symbols.
3. Configure access to your account from a desktop phone by entering a PIN of 6-10 numbers which are non-repeating and non-sequential.



Admin Homepage

When you log in as an administrator, you will be taken to the Admin Portal which allows you access to admin-only tools and configure 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. .



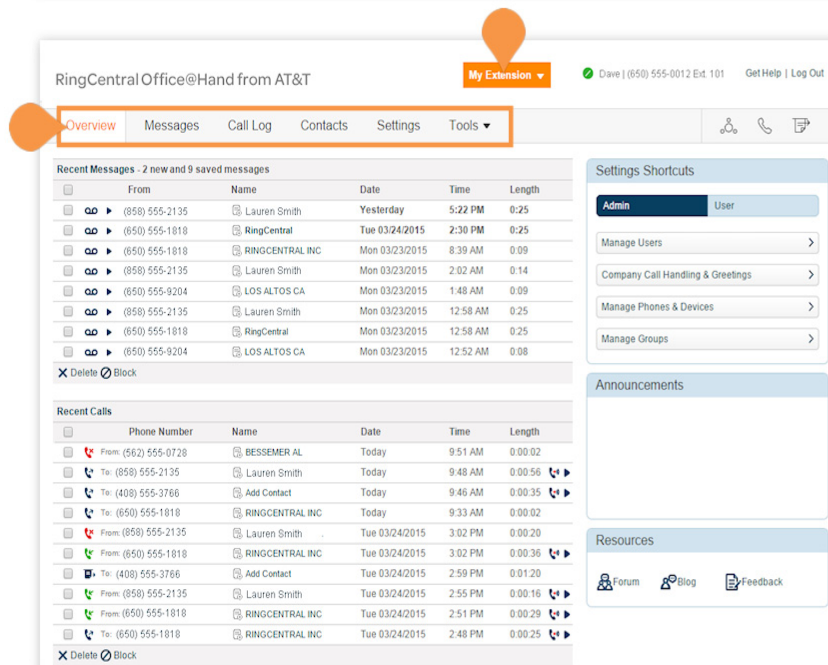
Main Functions

There are a few main functions that administrators can access from any online page. These functions are Do Not Disturb, Conference, RingOut, and FaxOut.

Tool tips are available in the user interface.

Admin Portal

From the Admin Portal, admins see admin-only tools. The Phone System tab is the main tab and landing page that houses all of the main settings for the entire phone system. Here, you have Company Info, Phone Numbers, Auto-Receptionist, Groups, and Phones and Devices. The Call Log, and Billing tabs display information about your phone system. The Tools tab has more setup options such as Session Timeout, IVR, and Templates.



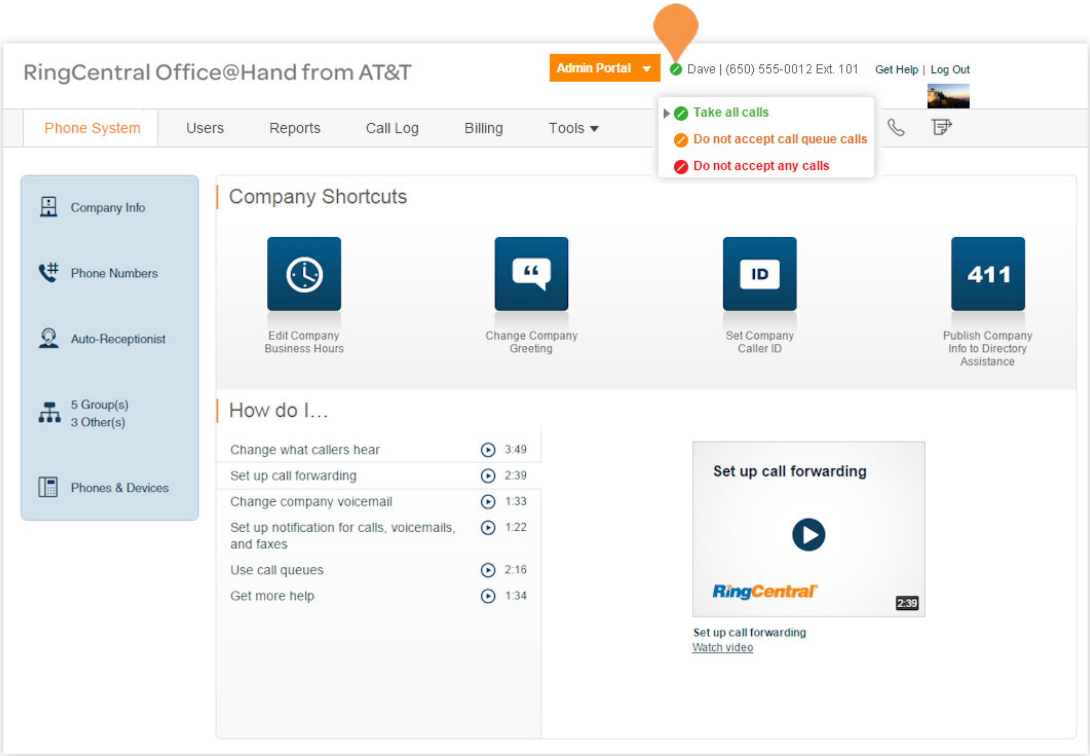
My Extension

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

Do Not Disturb

In the upper right of every page of your online account is a small colored icon next to your name. This icon displays your Do Not Disturb status. Click the icon to toggle between statuses:.

- "**Do Not Disturb Off** - Green means that you are available to take incoming calls.
- "**Do Not Disturb On** - Orange means "Do not accept call queue calls." These callers are sent to voicemail.
- "**Do Not Disturb On** - Red means "Do not accept any calls." All callers are sent to voicemail.



Audio Conference

Office@Hand customers can setup, host, and join conference calls anytime, anywhere. Click the Conference icon in the upper right corner of your online account to get started.

Each customer receives a unique 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 whenever you want.

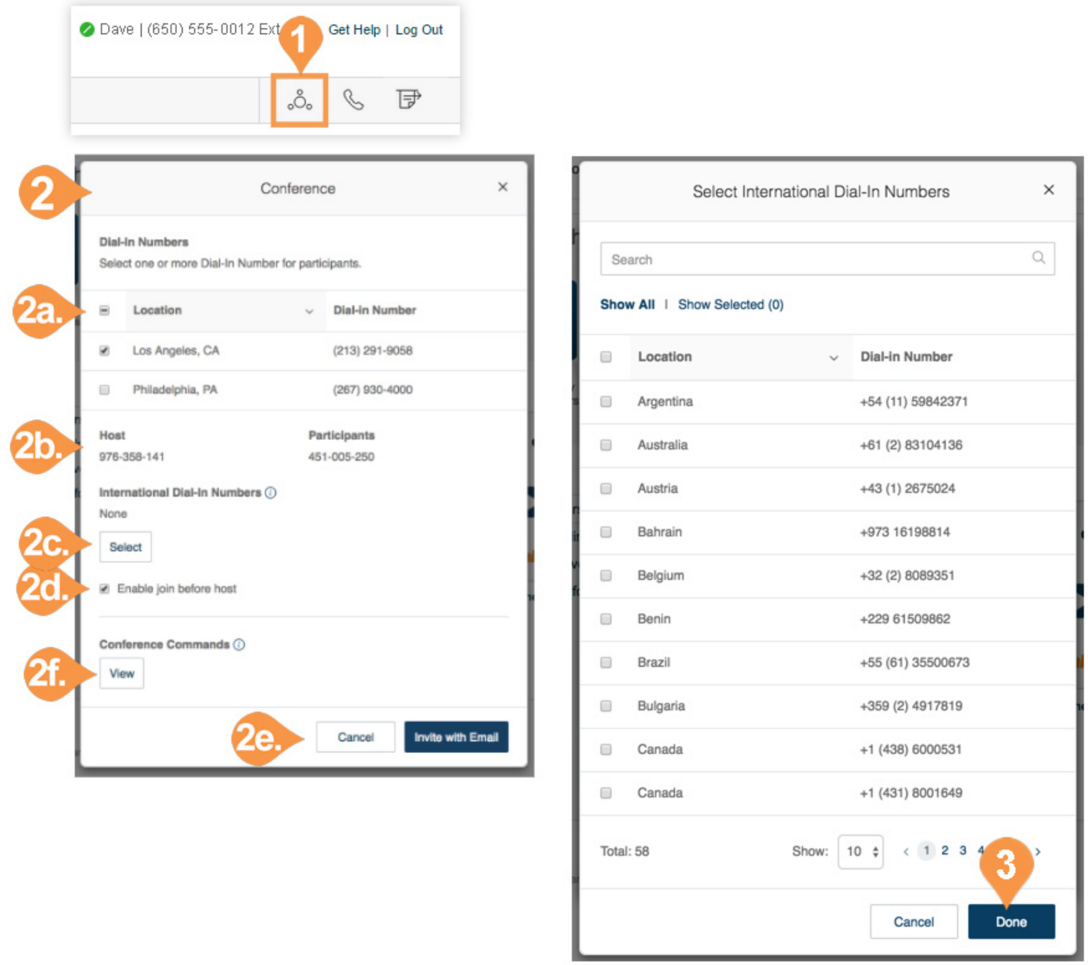
You also have the option to add the international dial-in number in the invitation. Check the "I have international participants" option and select the needed countries in the list.

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

Launch the Conferencing Application

1. Click the **Conference icon**.
2. A pop-up will appear with conference numbers and settings.
   a. View **Dial-in numbers**.
   b. View **Host** and **Participant** codes.
   c. If you have international participants, check the box next to **I have international participants**. Select international dial-in numbers at the bottom of the pop-up.
   d. Check the box next to **Enable join before host to allow participants** to start a conference call without a host.
   e. Click **Invite with Email** to open an email with prep-populated conference details - simply enter participant emails and send.
   f. Click **Conference Commands** to view Conference Commands*.
3. Click **Close**.

*See Conference Commands on the next page.



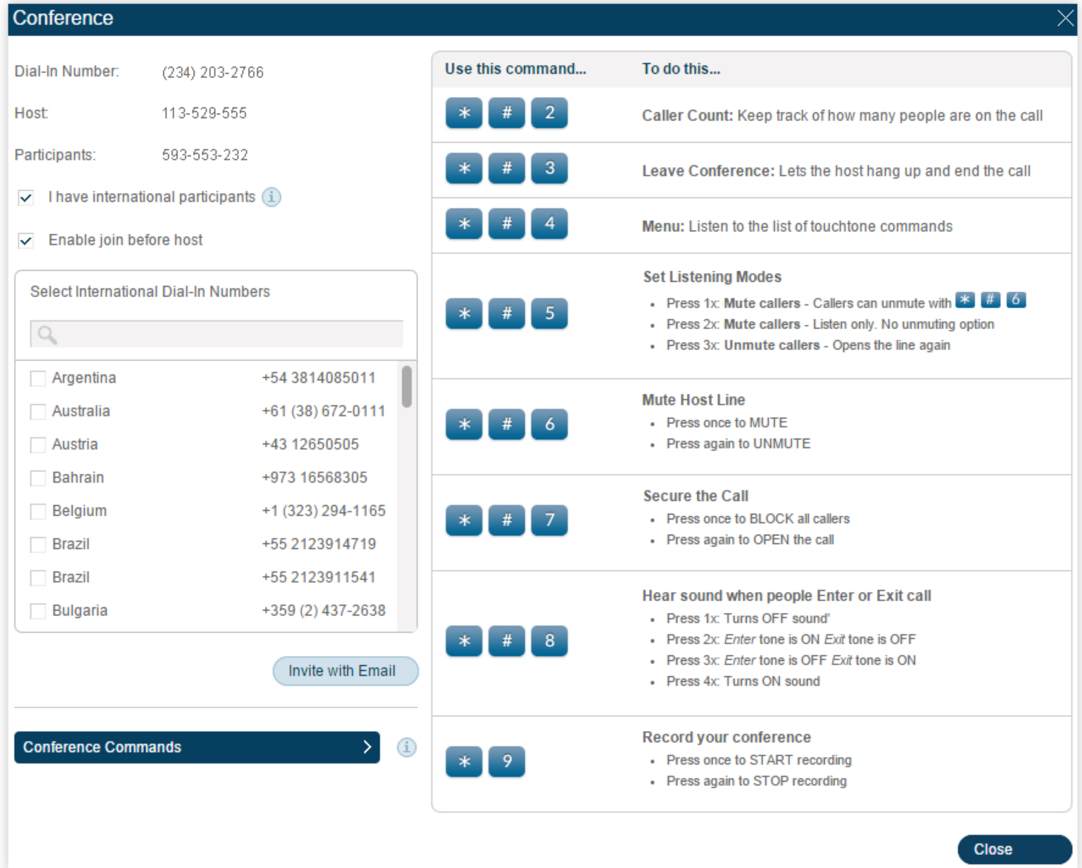
Conference Commands

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

The Host has the full call control and can access the conference commands in the table to the right.

Participants, on the other hand, have limited control of the conference commands.

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



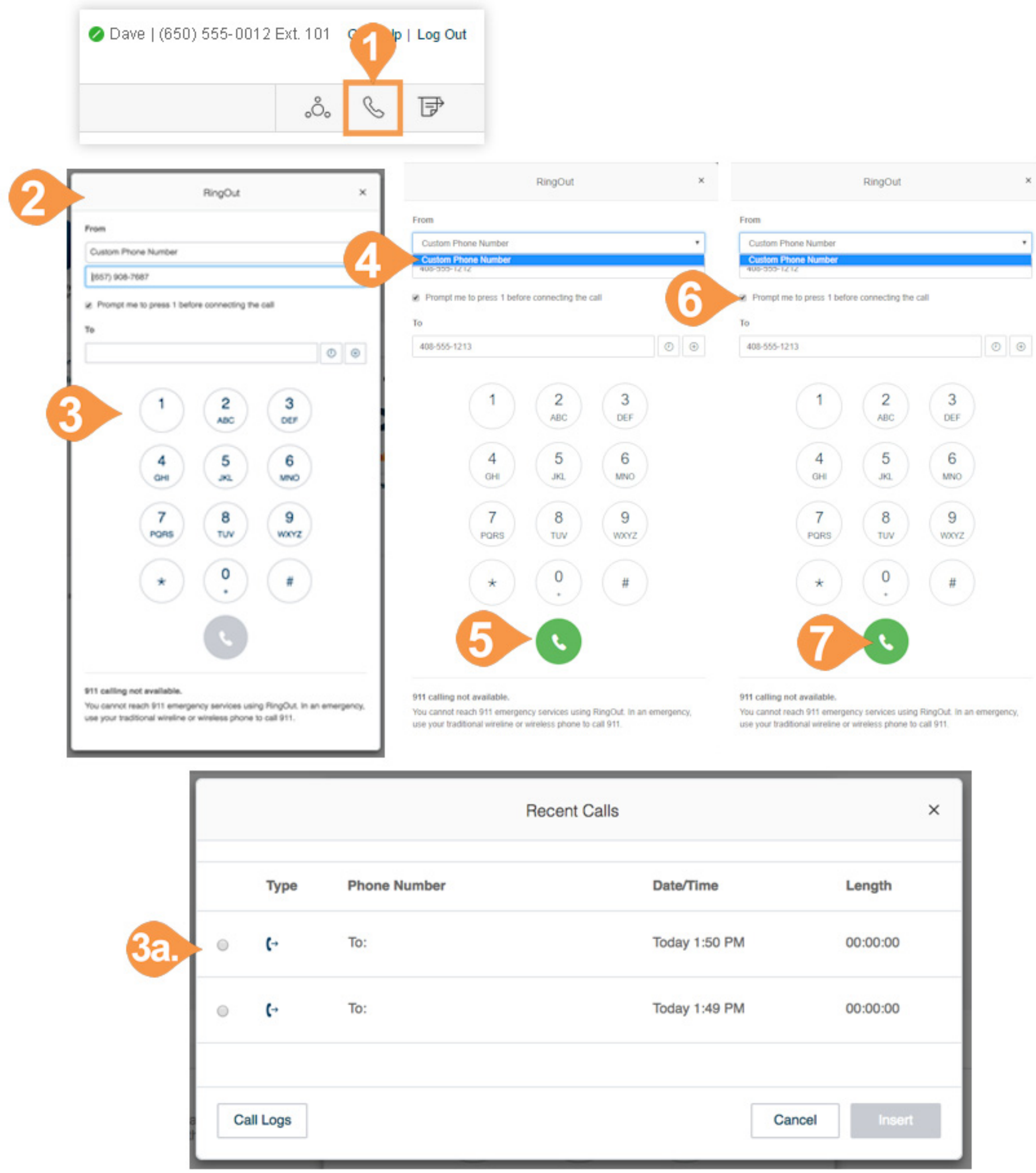
Preventing Music-On-Hold

On an demand parameter can be configured to prevent users from playing music-on-hold. When you request support to enable this parameter for your account, and a user with music on hold enabled joins a conference bridge, the client is prevented from playing music-on-hold during an explicit or implicit hold (such as answering an incoming call). This feature allows other participants on the bridge to continue without disruption.

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 RingCentral system will call your phone first, then dial out to the number you'd like to call to get you connected. The RingOut icon is located in the upper right of every online account page.

1. Click the **RingOut** icon in the upper right corner.
2. A pop-up dialer will appear.
3. Dial a number or use your keyboard to type a number into the text field. You can also choose from recent calls or your contact list.
4. Select the **From** number you'd like to show as your caller ID. You also have the option to choose Custom phone number from the drop-down menu and enter the desired number in the text field below the drop-down menu.
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 would like to make the call before you are connected. When the system calls you, you will hear "*Please press 1 to connect.*" This 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.

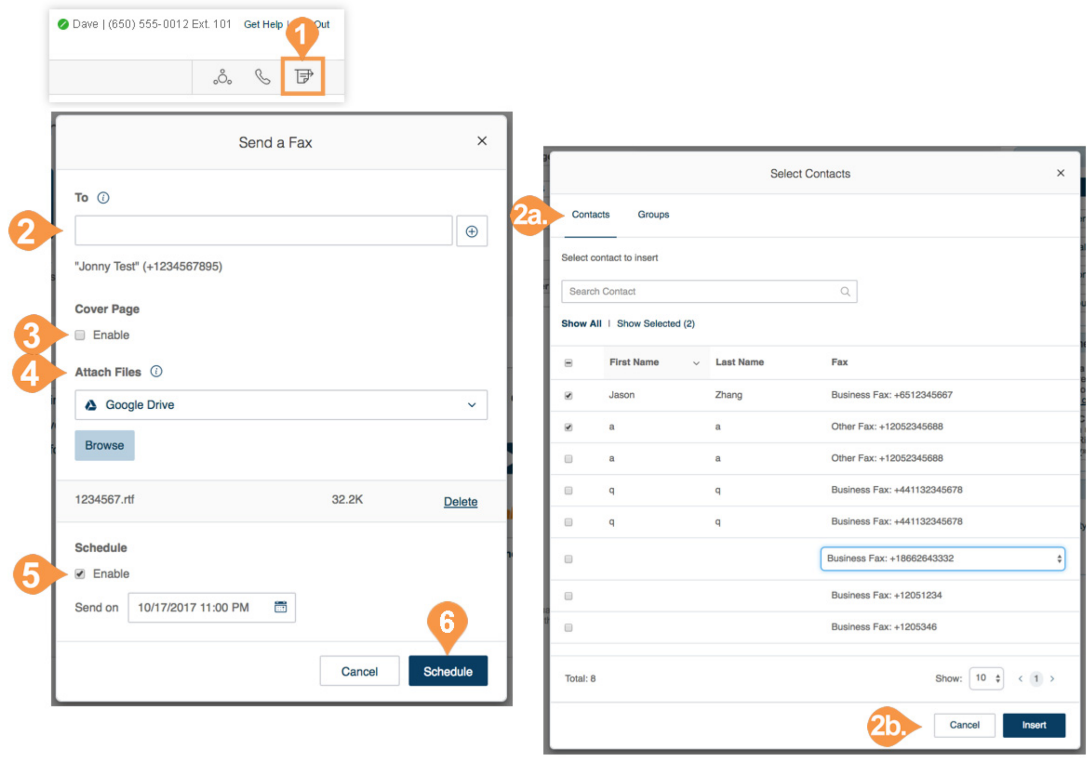


FaxOut

To quickly send a fax from your online account, click the FaxOut icon located in the upper right corner. Fill in the form with recipient's fax number and cover page information, and attach or scan a document, which will automatically be converted into a fax.

A wide variety of standard document types, including word processing and spreadsheet and PDF documents, are recognized by FaxOut. You can also send files from Dropbox, Box or Google Drive with just a few clicks.

1. Click the **FaxOut** icon in the upper right corner.
2. Enter up to 50 recipients and add a cover page message.
3. Attach files from Dropbox, Box, Google Drive or your computer and authorize RingCentral Office@Hand to access your files (you have to do this only once).
4. Click **Send Now** and your fax is on its way.



Phone System

Phone System

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

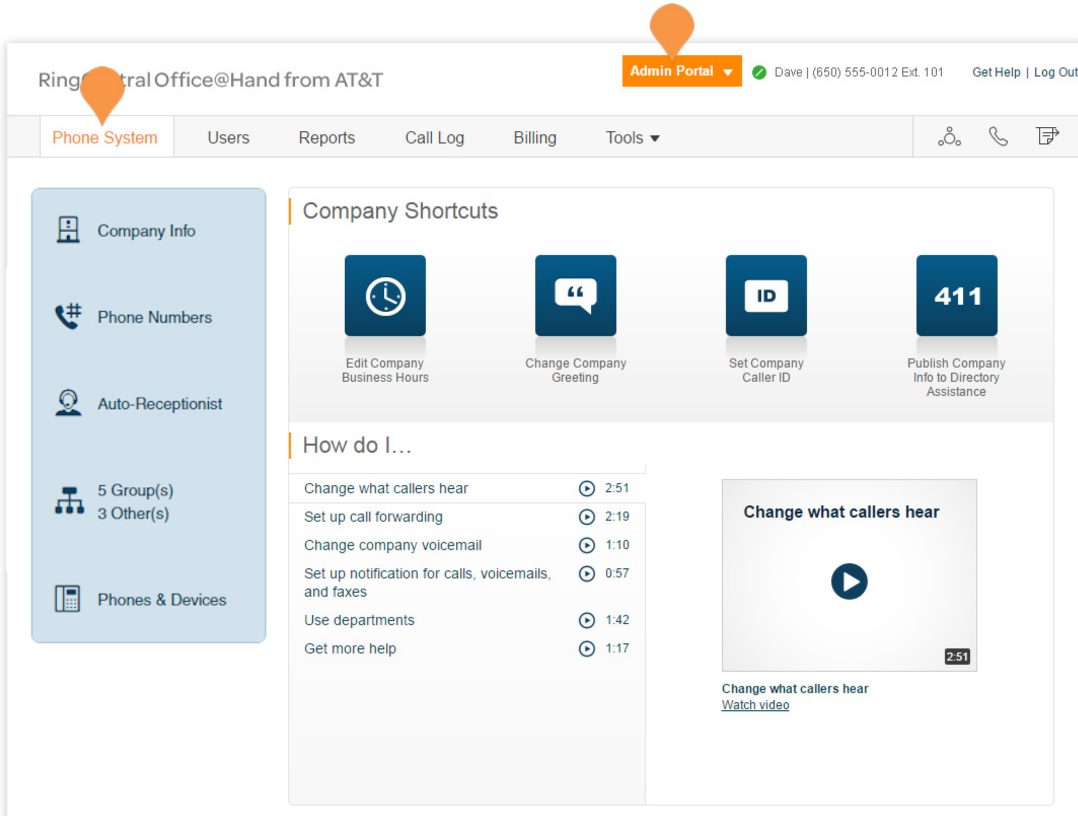
- Company Info
- Phone Numbers
- Auto-Receptionist Settings
- Multi-Level Auto-Receptionist
- Groups
- Phones & Devices

On your Phone System page, you have Shortcuts that allow you to quickly access commonly used functions such as:

- Edit Company Business Hours
- Change Company Greeting
- Set Company Caller ID
- Publish Company Info to Directory Assistance

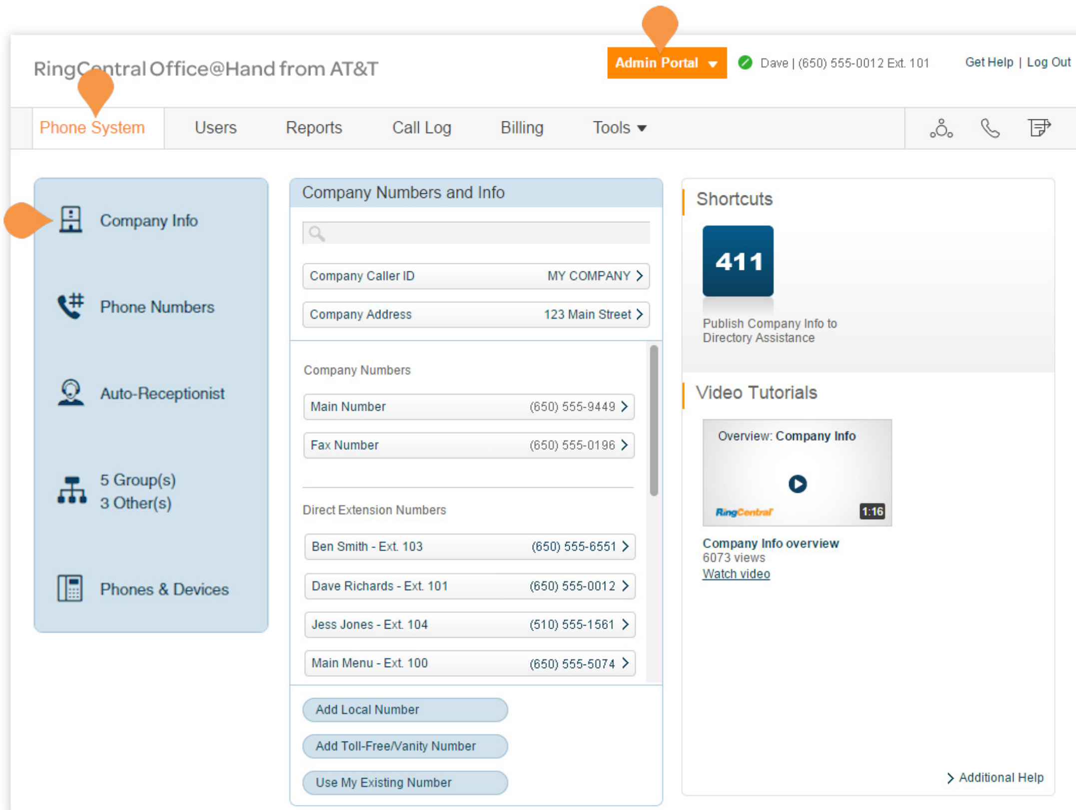
How do I…

If you need help setting up your phone system, check out the How do I… section to watch short, helpful videos.



Company Info

The Company Info settings include **Company Address**, **Caller ID Name**, and **Directory Assistance**. Select the appropriate tab to access each section.

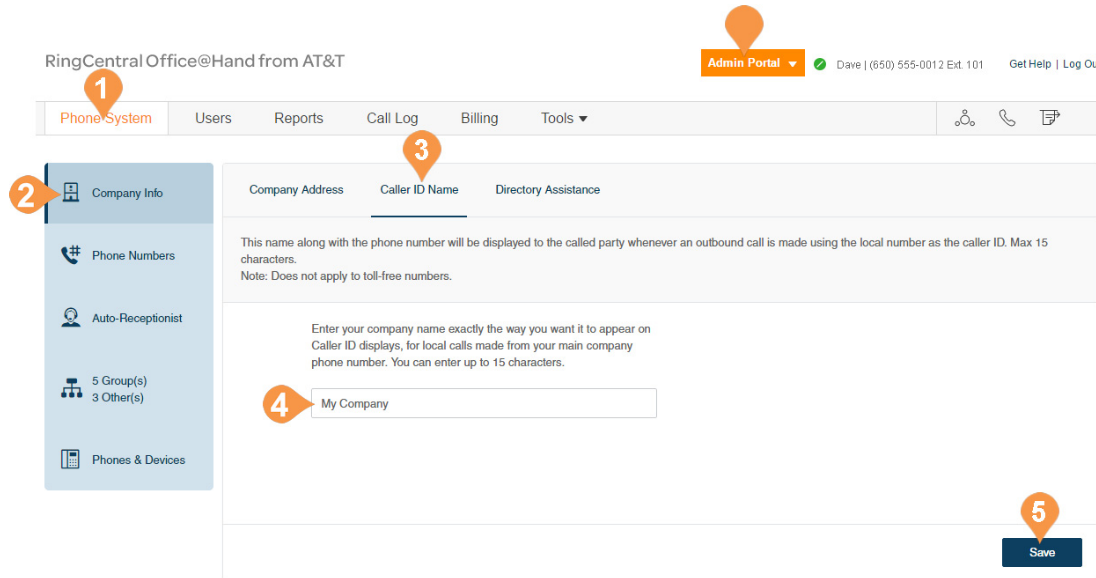


Caller ID Name

Set your Company Caller ID to your company's name so that your customers will know who is calling when you call 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. From the **Admin Portal**, select the **Phone System** tab.
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**.



Directory Assistance

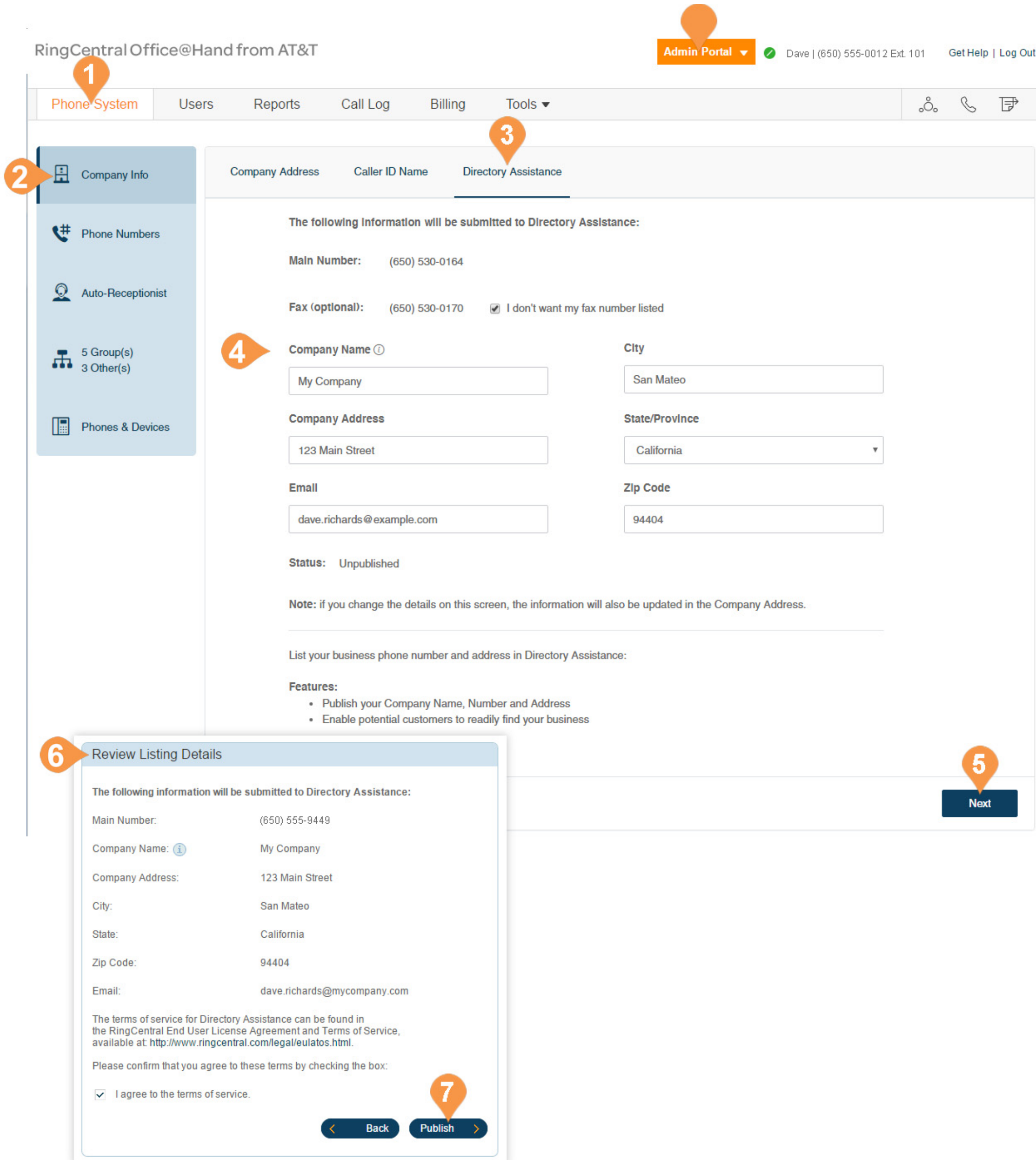
Directory Assistance is a free and convenient way to publish your business name, address, main number, and main fax number to increase your company's visibility in local directory assistance listings.

For more information about Directory Listing, go to Directory Listing Frequently Asked Questions.

To publish your information:

1. From the **Admin Portal**, select the **Phone System** tab.
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**.

Please allow five business days for your listing to appear. Edit or delete your listing any time by following these same steps.

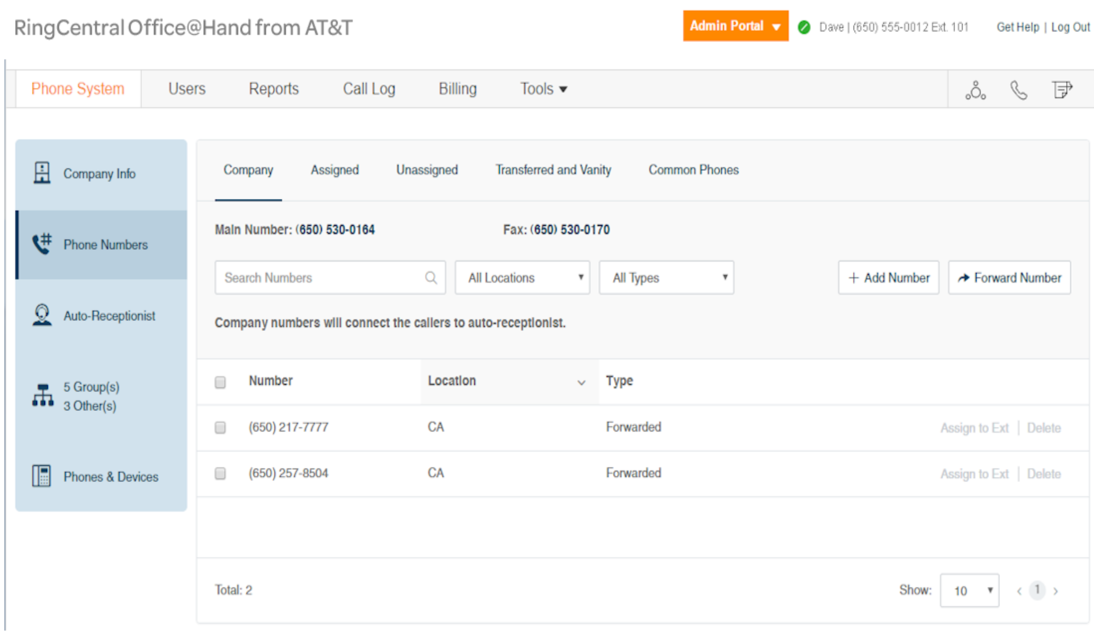


Phone Numbers

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

The tabs contains these types of numbers:

- Company: numbers that will connect the caller to the Auto-Receptionist.
- Assigned: numbers in your account assigned specifically to an extension.
- Unassigned: numbers in your account not assigned to any user.
- Transferred and Vanity: existing numbers that have been transferred, and vanity numbers to help customers remember your business phone number.
- Common Phones: numbers that are dedicated for use as phones for Hot Desking. For more information, see See “Hot Desking” on page 121..



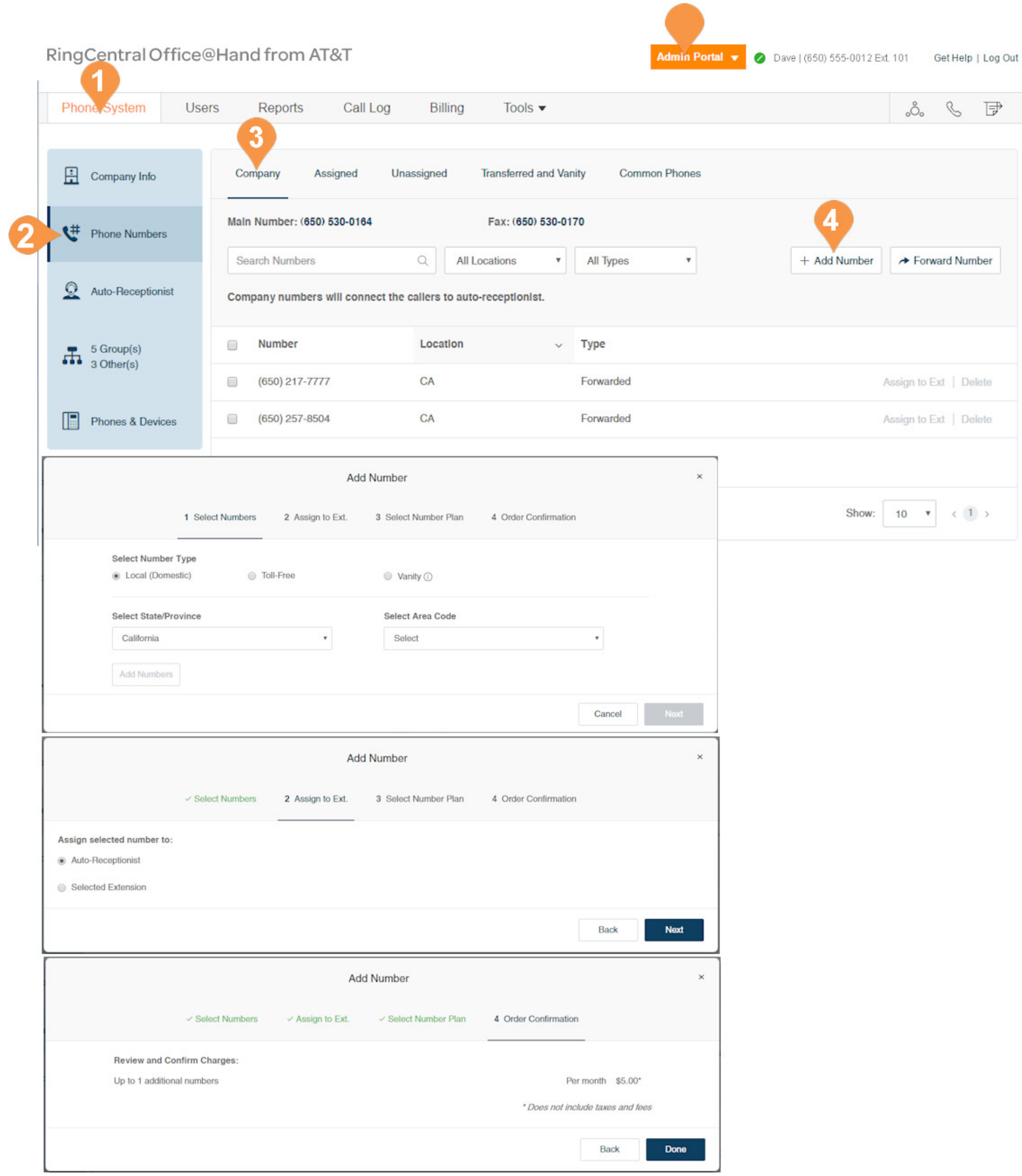
Add Company Numbers

Adding additional company numbers to your Office@Hand account is simple. Select from a list of local numbers by city and area code, choose an available toll-free number or create your own vanity (personalized) number. You can also use an existing number.

Each Office@Hand 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. This flexibility allows you to maximize the use of your service.

To add a company number:

1. From the **Admin Portal**, select **Phone System**.
2. Click **Phone Numbers**.
3. Click **Company**.
4. Click **Add Number** to add a new number. Follow these instructions for the type of number you choose:
   a. **Local (Domestic)**: Provide the State/Province and Area Code. Select one or more numbers and click **Add Numbers**.
   b. **Toll-Free Number**: Select the button for **Toll-Free Number** and select a Toll-Free prefix. Select one or more numbers and click **Add Numbers**.
   c. **Vanity**: Select the button for **Vanity Number**. Enter a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click Search to see if it is available. Select a number and click **Add Numbers**.
5. Click **Next**.
6. Assign the number as **Auto-Receptionist** or **Selected Extension**.
7. Review any changes to your number plan.
8. Click **Done**.



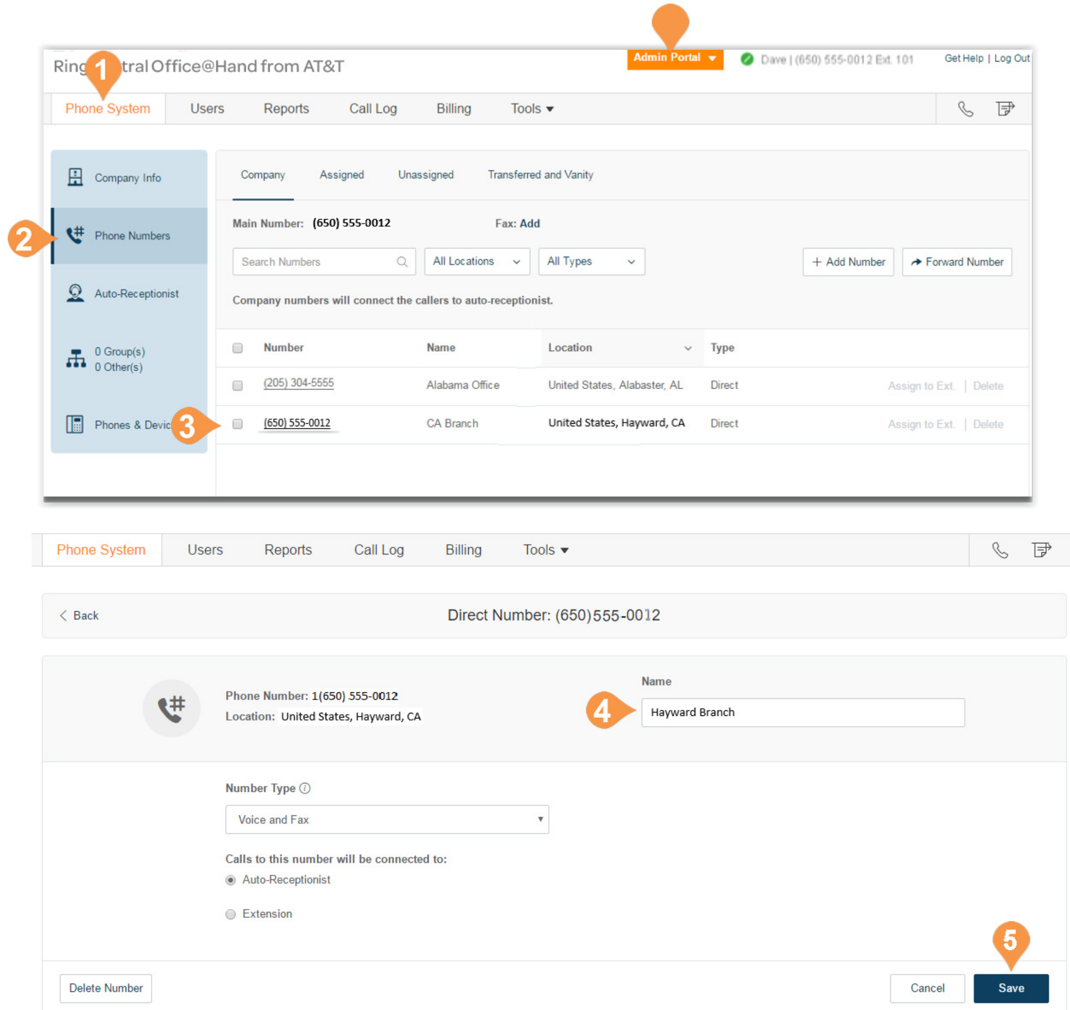
Name or Label Definition

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. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click the phone number to which you want to apply a label. The **Direct Number** window opens.
4. Enter the label text in the **Name** field.
    - You can designate the kind of number by using **Number Type**.
5. Click **Save**.

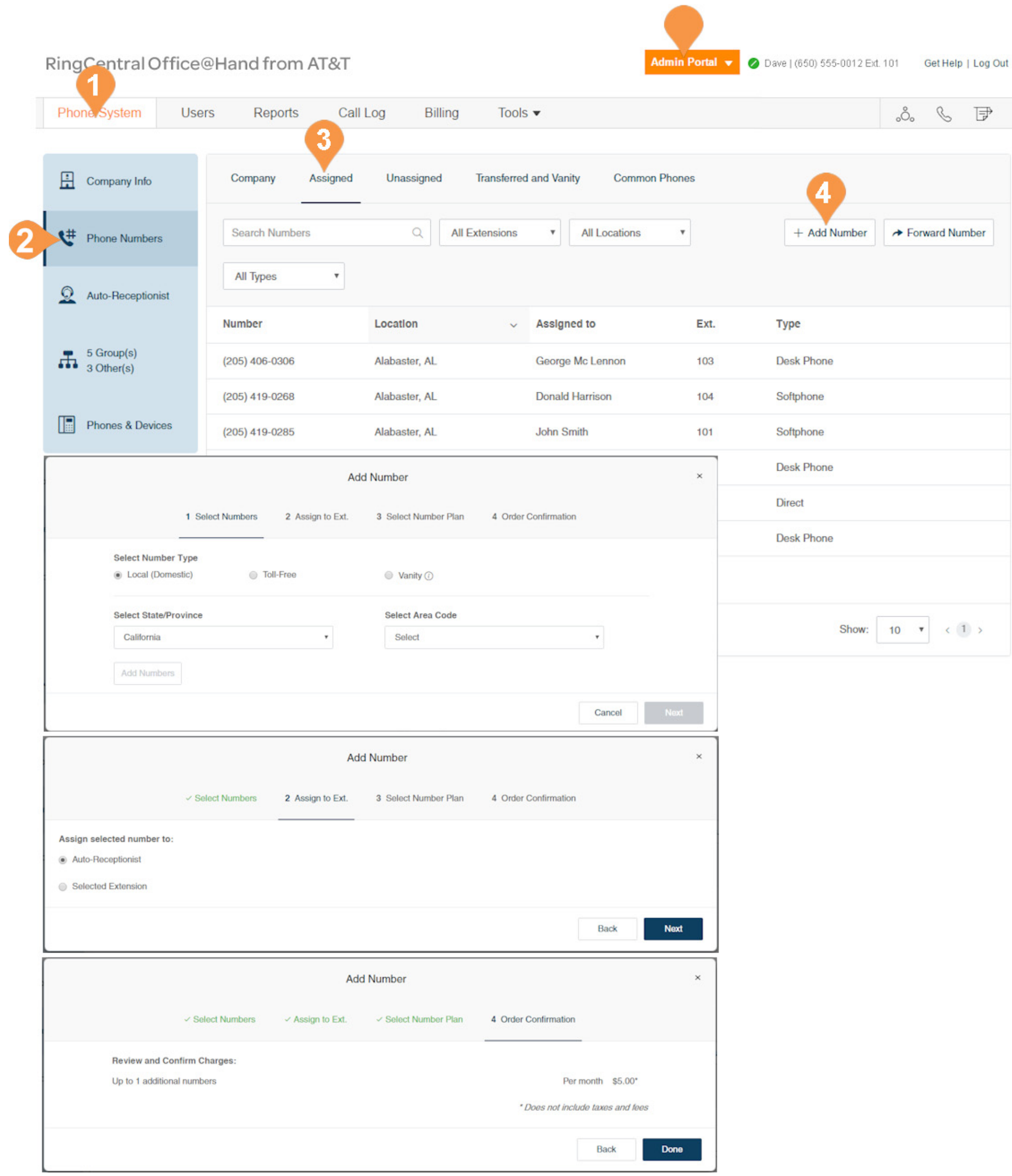
*This option is available for Enterprise users.



Add Assigned Numbers

Under Assigned, you will see all of the numbers assigned to a user that have been set for your phone system.

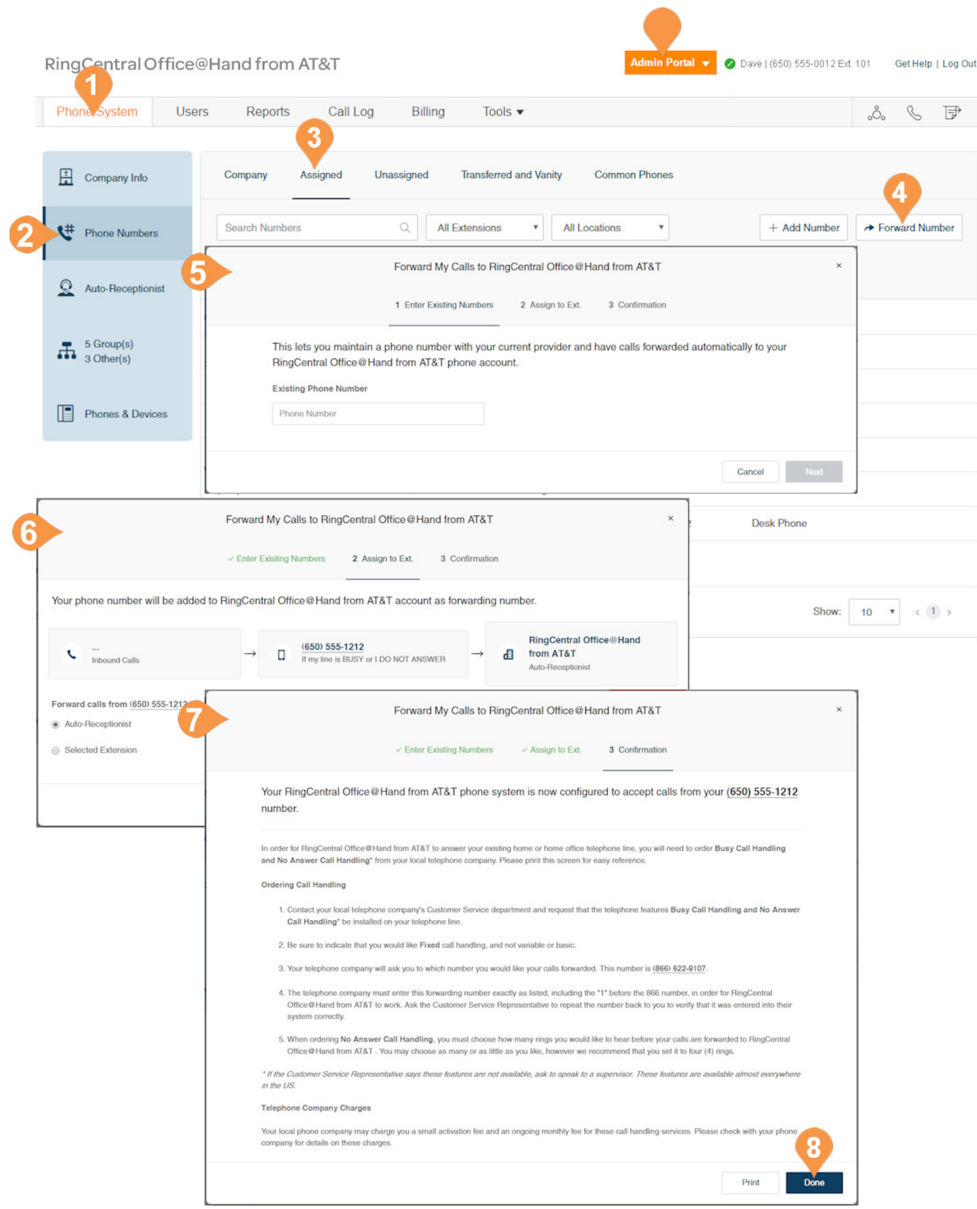
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers.**
3. Click **Assigned.**
4. Click **Add Number** to add a new number. Follow these instructions for the type of number you choose:
   a. **Local (Domestic)**: Provide the State/Province and Area Code. Select one or more numbers and click **Add Numbers.**
   b. **Toll-Free Number**: Select the button for **Toll-Free Number** and select a Toll-Free prefix. Select one or more numbers and click **Add Numbers.**
   c. **Vanity**: Select the button for **Vanity Number.** Enter a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click Search to see if it is available. Select a number and click **Add Numbers.**
5. Click **Next.**
6. Assign the number as **Auto-Receptionist** or **Selected Extension.**
7. Review any changes to your number plan.
8. Click **Done.**



Forward a Number

To maintain your phone number with your current provider, and forward calls automatically to your Office@Hand account:

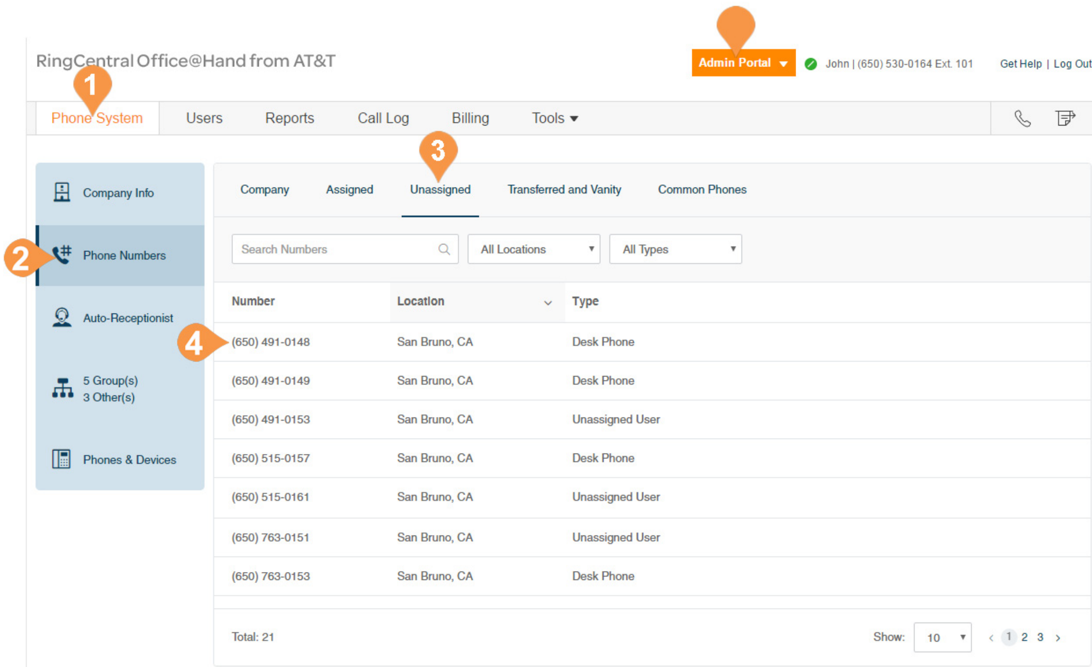
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone**.
3. Click **Assigned**.
4. Click **Forward Number**.
5. Enter an existing phone number and click **Next**.
6. Select **Auto-Receptionist**, or **Select Extension**. Click **Next**.
7. Review the information about ordering Busy Call Handling and No Answer Call Handling from your local telephone company, and local telephone company charges.
8. Click Done.



View Unassigned Numbers

Under Unassigned, you will see all of the numbers that have not yet been assigned to a user.

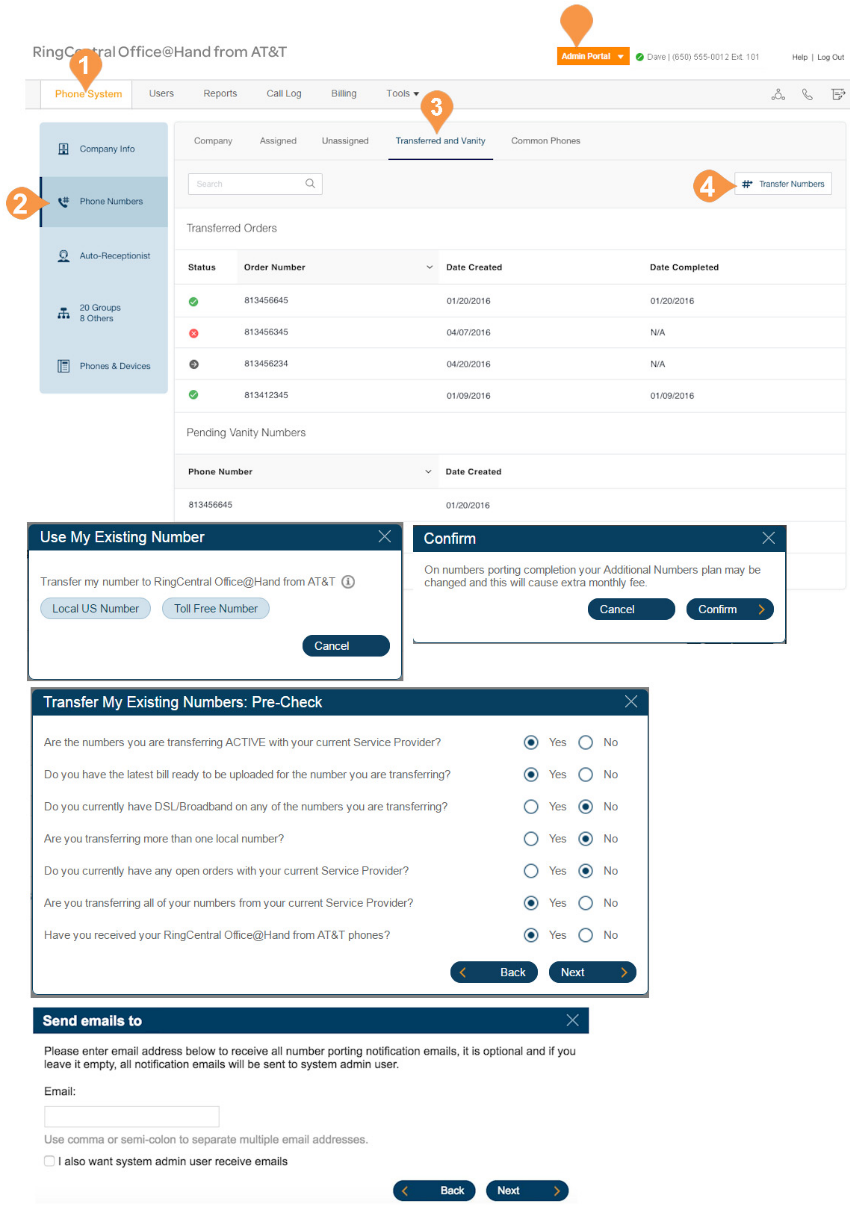
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers.**
3. Click **Unassigned.** You can filter results by **Location** and **Type.**
4. Click a number to see more details. You can select **Phone Properties** to see more details in the Phones and Devices view.



View Transferred and Vanity Numbers

Under Transferred and Vanity Numbers, you will see all of the numbers that you have transferred, and your vanity numbers.

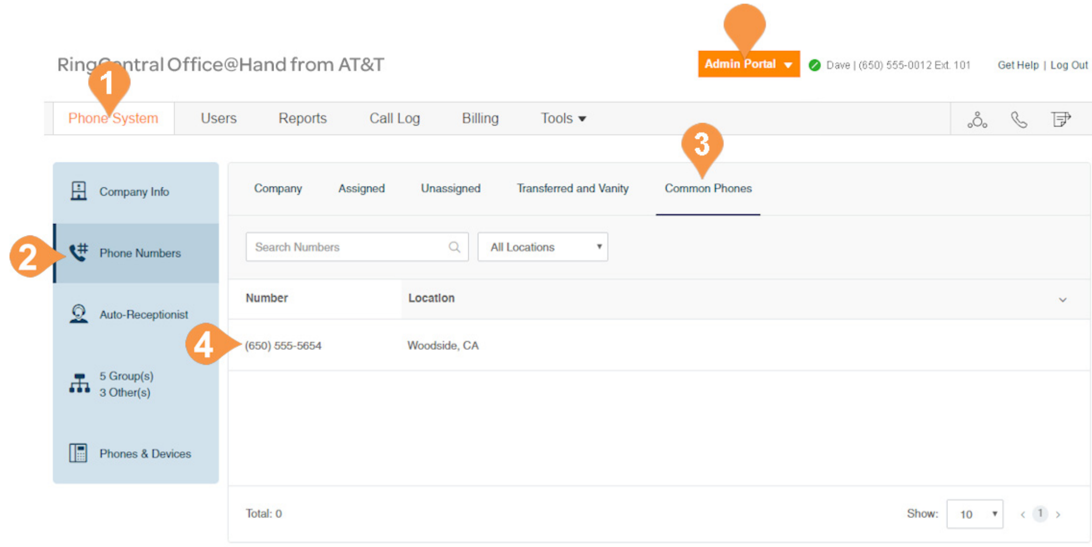
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers.**
3. Click **Transferred and Vanity Numbers**. You can filter results by **Location** and **Type**. Click a number to see more details.
4. To transfer a number to Office@Hand select **Transfer Number**.
   a. Select a Local US Number or Toll Free Number.
   b. Confirm that the transfer may incur charges to your plan.
   c. Answer the questions to verify that your transfer meets requirements.
   d. Enter the **Billing Number** and click **Check** to verify that the number can be transferred.
   e. Enter the numbers to be transferred, separated by commas or semi-colons.
   f. Click **Next.**
   g. Enter one or more email addresses that will receive emails about the status of the transfer request. If you do not enter an address, all notification emails will be sent to the system admin user.
   h. Click **Next.**
5. Confirm the transfer order.



View Common Phones

Under Common Phones, you will see all of the numbers that have been assigned for hot desking.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phone Numbers**.
3. Click **Common Phones**. You can filter results by **Location** and **Type**.
4. Click a number to see more details. You can select **Phone Properties** to see more details in the Phones and Devices view.

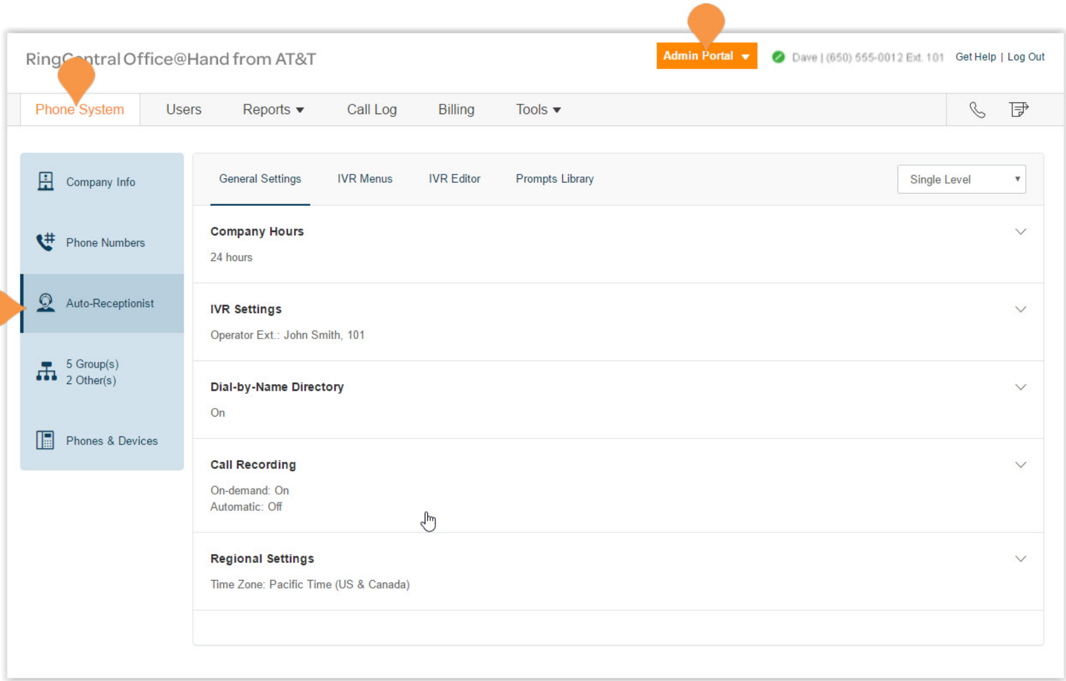


Auto-Receptionist

Auto-Receptionist Settings

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.

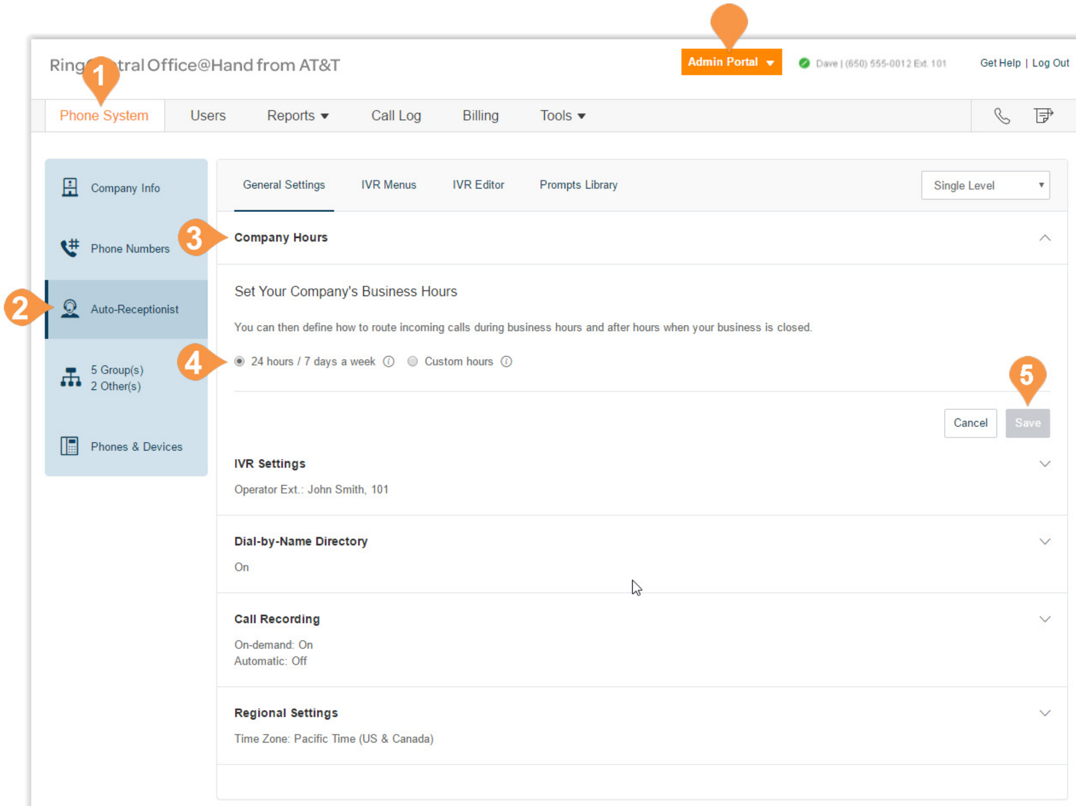
Note: The Auto-Receptionist defaults to IVR Mode: single level. You can change the IVR mode to multi-level for a more intricate IVR menu. Once the settings are changed to multi-level IVR mode, options are slightly different. For more information see Multi-Level Auto-Receptionist.



Company Business Hours

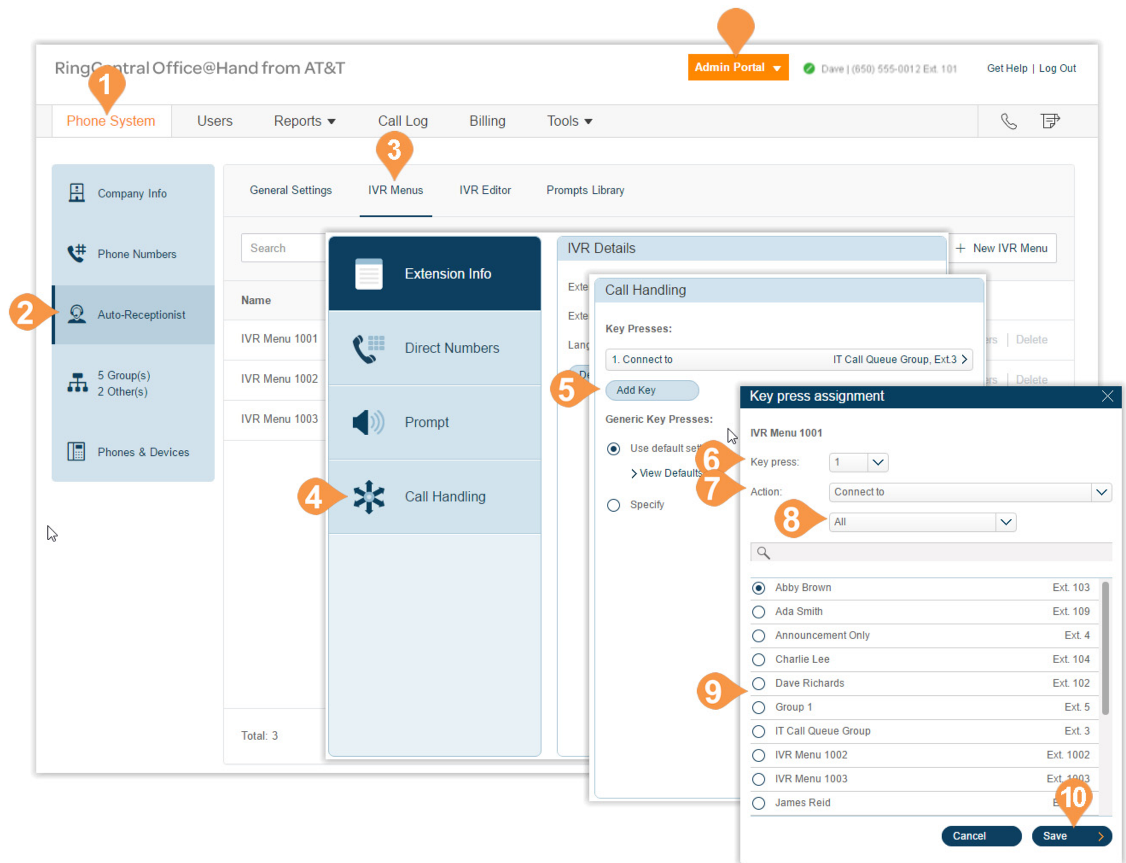
Customize your company's business hours. You can specify the opening and closing time for each day of the week or select 24 hours. This establishes the settings for the Business Hours and After Hours tabs in other settings areas (such as call queue settings and user settings).

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select **Company Hours**.
4. 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 Settings to Weekdays** or **Copy Settings to All Days.**\
5. Click **Save**.



Company Call Handling

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 callsdirectlytoanextensionofyourchoice.



Set Call Handling:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **IVR Menus** and select one of them. The **IVR Details** pop-up appears.
4. Click **Call Handling.**
5. Click **Add Key**. The **Key Press Assignment** pop-up appears.
6. Set the **Key Press**.
7. Select a **Connect to** action.
   - Transfer to voicemail of
   - Connect to dial-by-name directory
   - External transfer
8. Then select to whom the setting will apply.
   - All
   - IVR Menus
   - Users
   - Groups
   - Others
9. Select **Users**.
10. Click **Save** .

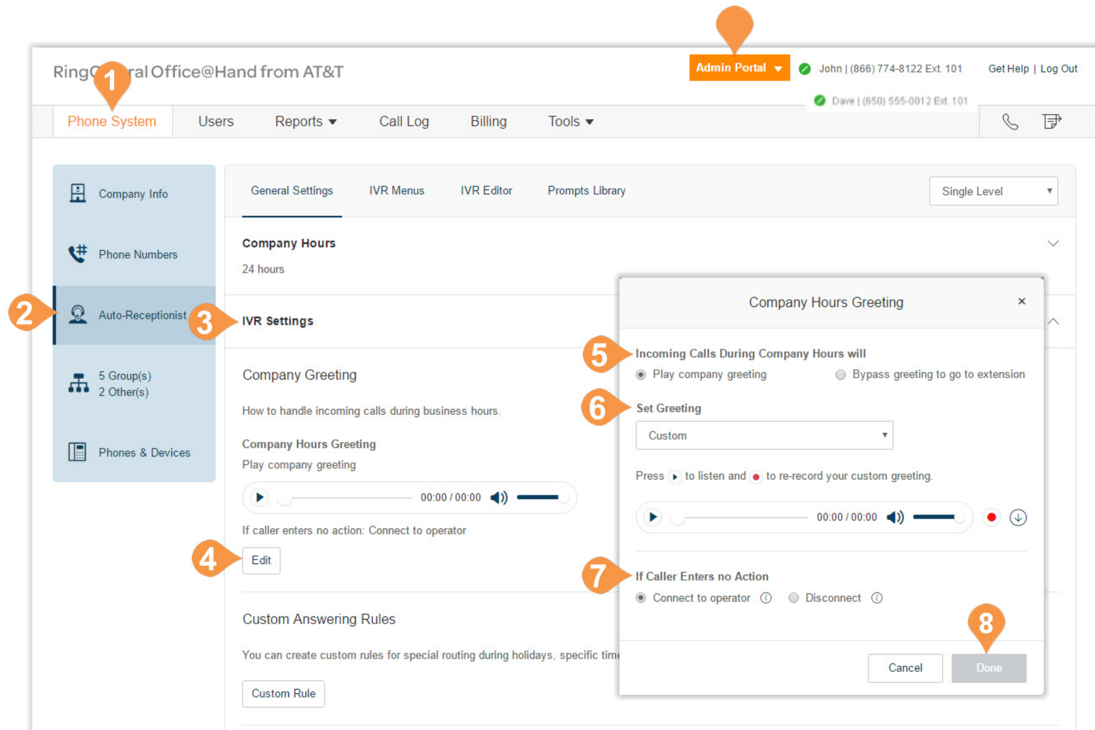
You can learn more about visual IVR settings in "Visual IVR Editor" on page 54.

Company Greeting and Menu

The Company Greeting provides additional call handling options, including hearing the **Default** greeting and recording a **Custom** greeting.

Set a Company Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **IVR Settings**. **Company Greeting appears under IVR Settings**.
4. Click **Edit** under Company Greeting. The **Company Hours Greeting** pop-up appears.
5. Set the **Incoming Calls During Company Hours will** to one of these:
   - Play company greeting
   - Bypass greeting to go to extension
6. For **Set Greeting**
   a. **Default**: Select **Default** and set the language the greeting for **View In**.
   b. **Custom**: Select **Custom** to set your custom recording:
   - Follow the directions for "Recording Greetings and Messages" on page 63.
7. Under **If caller enters no action,** choose **Connect to an operator** or **Disconnect**
8. Click **Done**.



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. From the **Admin Portal**, select the **Phone System** tab.

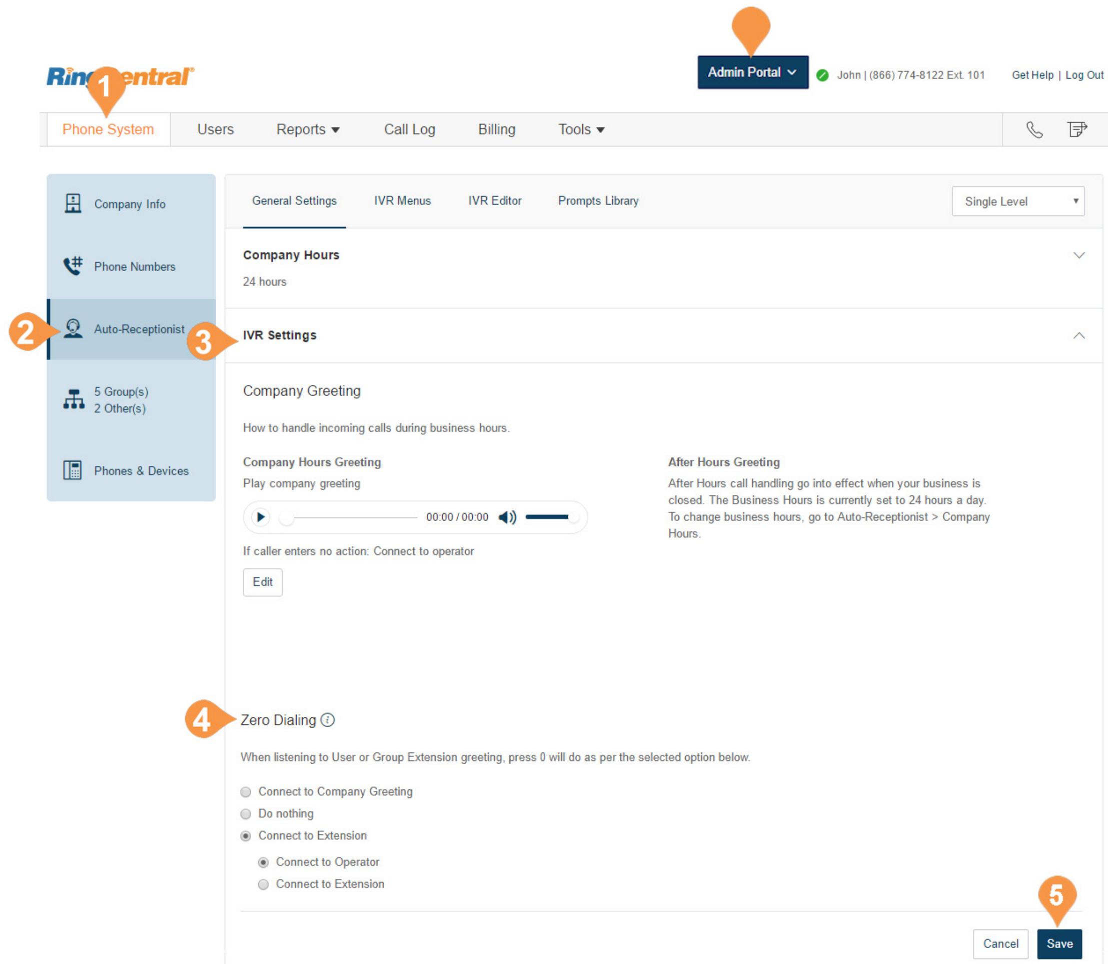
2. Select **Auto-Receptionist**.
3. Select **IVR Settings**.
4. Scroll down and click **Zero Dialing** .
5. Select one of three options:
   - **Connect to Company Greeting**
   - **Do Nothing**
     System ignores any '0' dialed by caller and continues uninterrupted. This applies regardless of the number of times the caller dials '0'.
   - **Connect to Extension**
     Choose from **Connect to Operator** or **Connect to Extension**

     If you choose **Connect to Extension**, the system prompts you for an extension number.

     Removal of the destination extension:

     A warning shows that the extension being removed is in use for 0-dial handling and you are given the option to cancel the removal.

     When an extension is removed, the 0-dial option defaults to the company greeting.
6. Click **Save**.



On-demand Call Recording

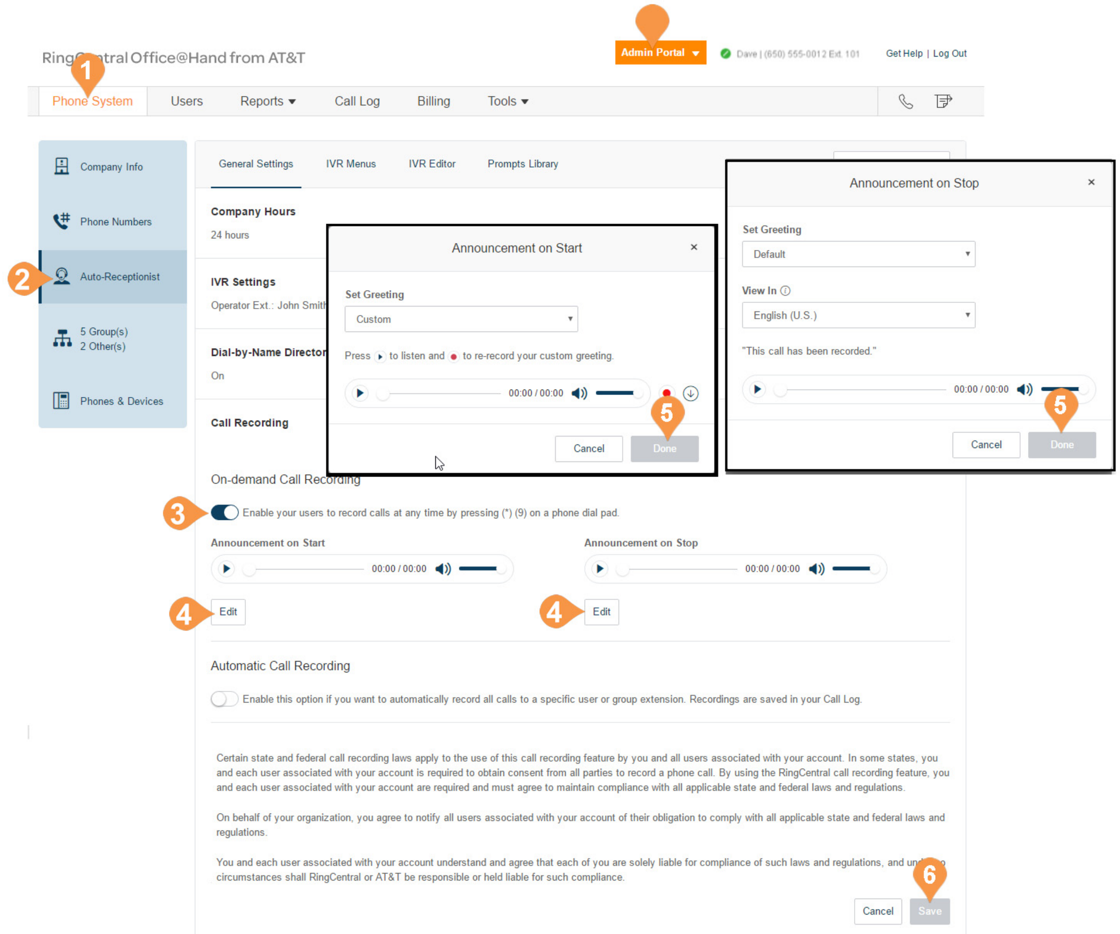
On-demand Call Recording makes it easy for Office@Hand users to record calls they make or receive. When you enable On-demand Call Recording, users can activate it by pressing *9 on their phone’s dial pad.

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 or AT&T are not responsible for your company’s compliance..

Choose an On-demand Call Recording Announcement

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

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

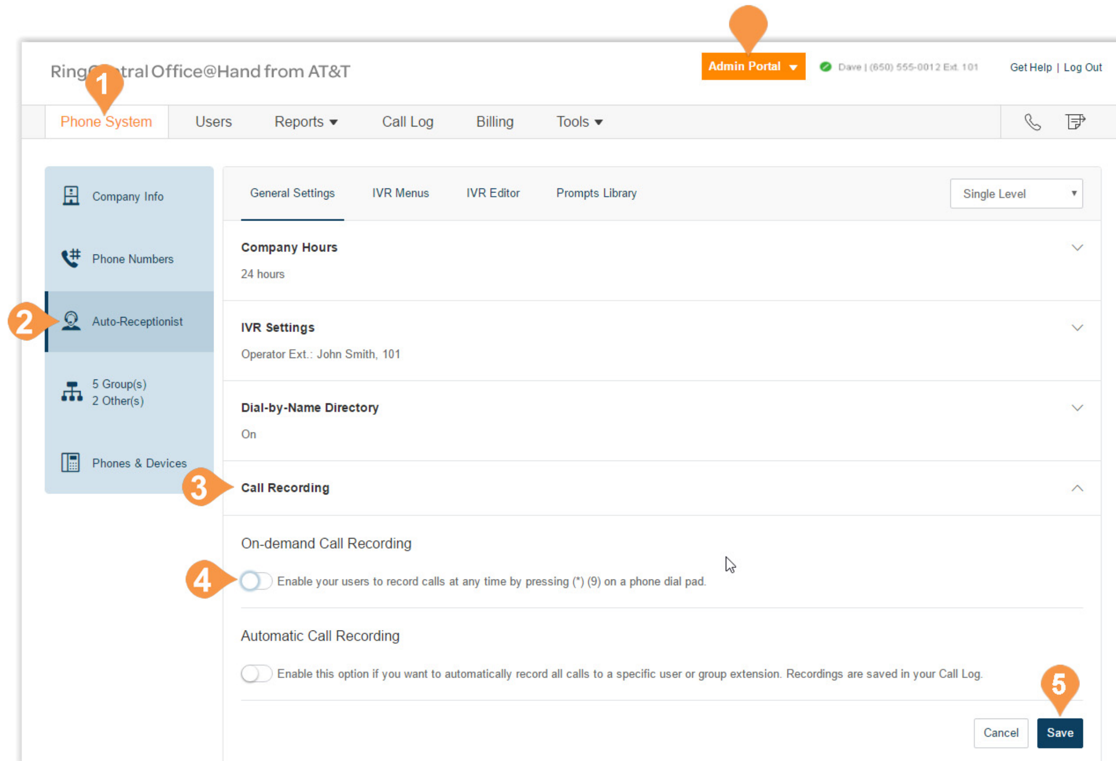


To enable On-demand call recording, see page 41.

Enable On-demand Call Recording Announcement

To enable the on-demand call recording feature:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Move the slider button to the right next to, **Enable your users to record calls at any time by pressing (*) (9) on a phone dial pad**.
5. Click **Save**.



Automatic Call Recording*

Automatic Call Recording allows you to record incoming and outgoing calls automatically. You can also play back the recordings or download the recorded call logs for sales and support training, compliance, etc.

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 make sure your company's call recording procedures comply with federal and state laws; RingCentral or AT&T are not responsible for your company's compliance.

Choose an Automatic Call Recording Announcement

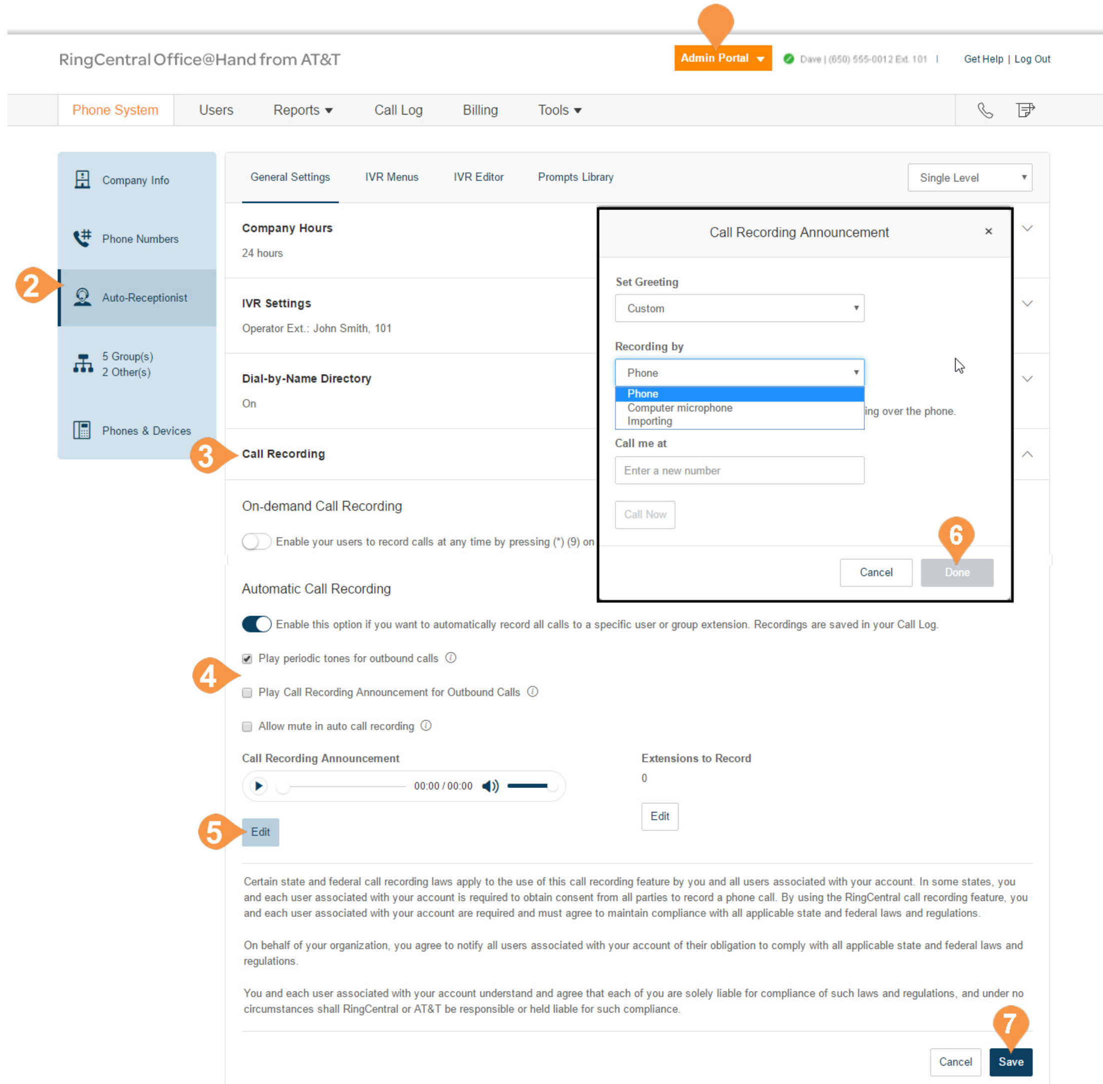
First enable automatic call recording. See page 43.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
   - Ensure that Automatic Call Recording is on.
4. Click boxes for the desired options:
   - Play periodic tones for outbound calls
   - Play Call Recording Announcement for Outbound Calls
   - Allow mute in auto call recording

You can also listen to your recording announcement or specify extensions to record.

5. Click **Edit** to select the call recording announcement. The Call Recording Announcement pop-up appears.
   - Select **Default** to use the provided greeting.
   - Select **Custom** to record a greeting.
6. Click **Done**.
7. Click **Save**.

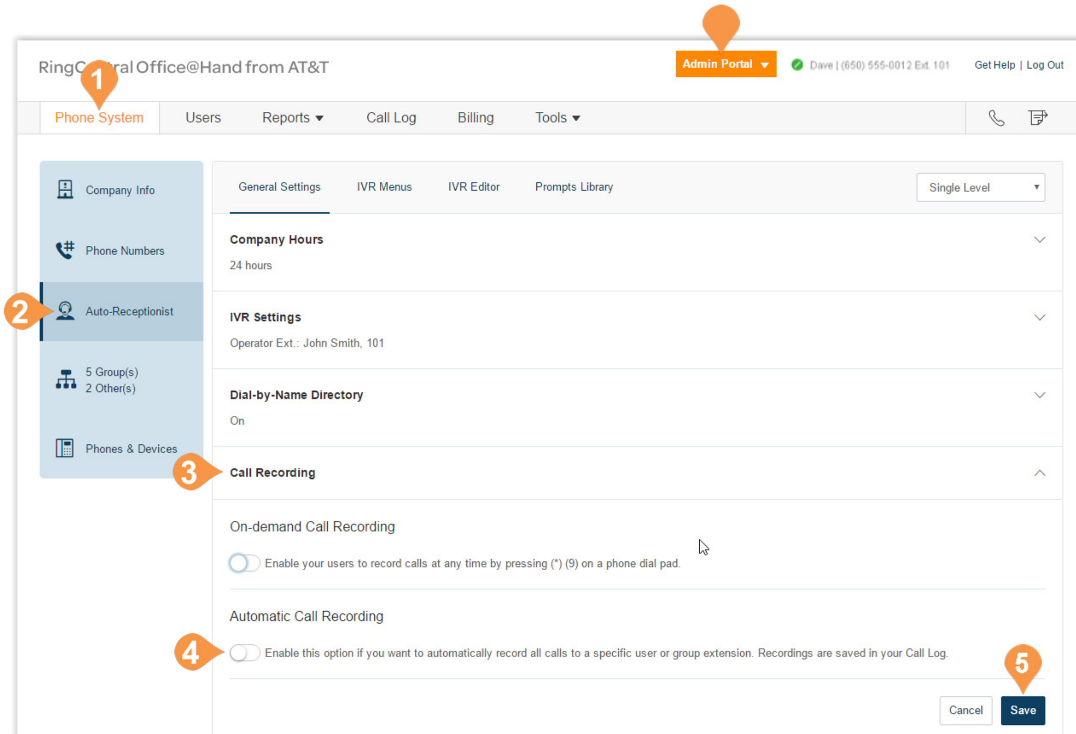
*This option is available for Office Premium and Enterprise only.



Enable an Automatic Call Recording Announcement

To enable the automatic call recording feature:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Click **Call Recording**.
4. Slide the button on for **Automatic Call Recording**.
5. Click **Save**.



Planning for Interactive Voice Response (IVR)

In the Office@Hand system, you can create a multi-level

IVR as an additional option to the Auto-Receptionist. It extends the Auto-Receptionist menu with more powerful and efficient call handling.

Layout Your Multi-level IVR Plan

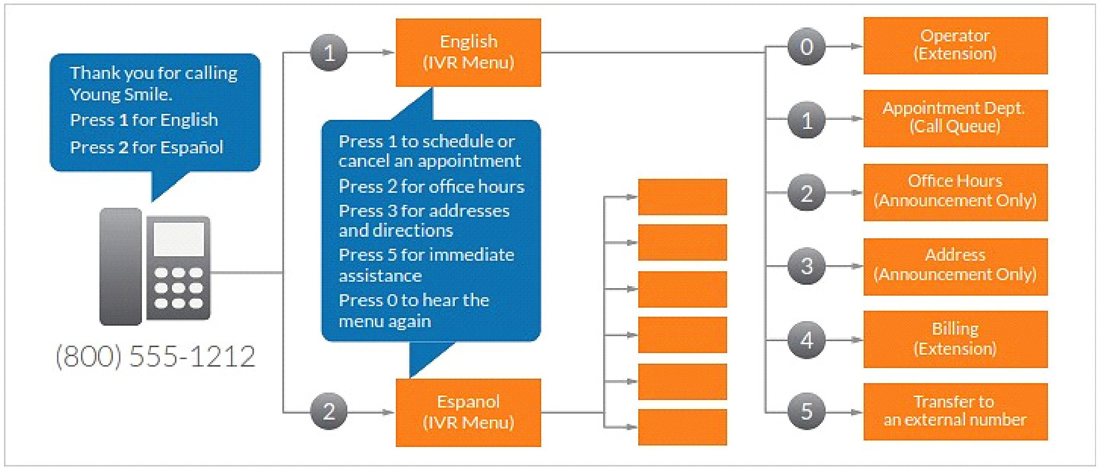
The Office@Hand Multi-level IVR facility supports up to 250 menus for each account you create. It provides callers with options to self-select how they can reach a person or a department in your company. The first step in creating a multi-level IVR menu is to lay out a call-routing plan similar to the examples shown on this page.

Single-Location IVR Use Case

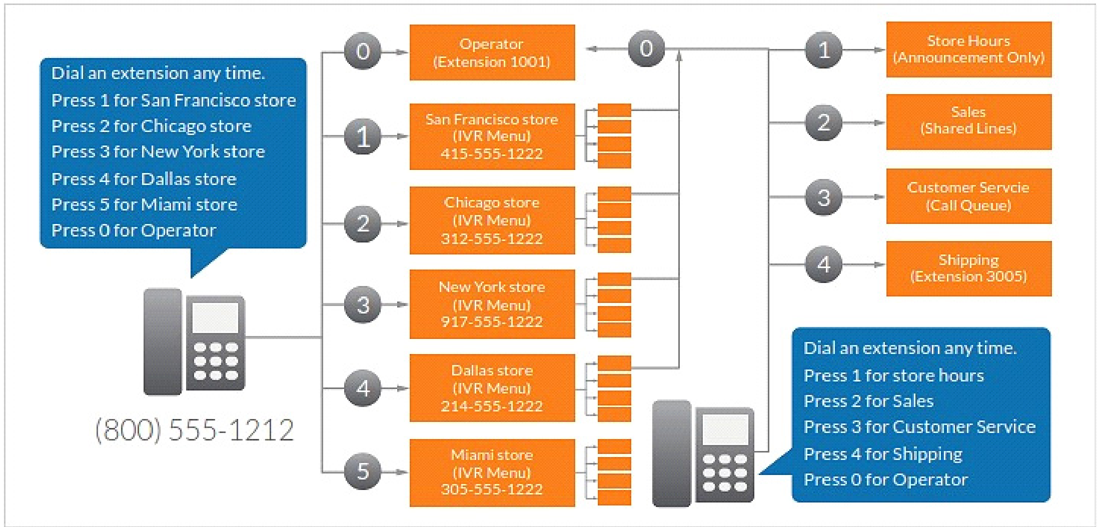
A local dentist office provides services to both English- and Spanish-speaking customers. The dental office IT Manager configures the phone routing system with identical prompts in two languages.

Multiple-Locations IVR Use Case

A nationwide furniture retailer has 5 stores located in San Francisco, Chicago, New York, Dallas, and Miami. The IT Manager sets up a toll-free number for the automated attendant system that can route incoming calls to the proper stores in the entire retail chain.



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



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

Switch 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 multi-lingual menus.

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

NOTE: Because your call handling settings are discarded, you will need to reset your call handling settings.

NOTE: 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.

For more details, see "IVR Menus" on page 51.

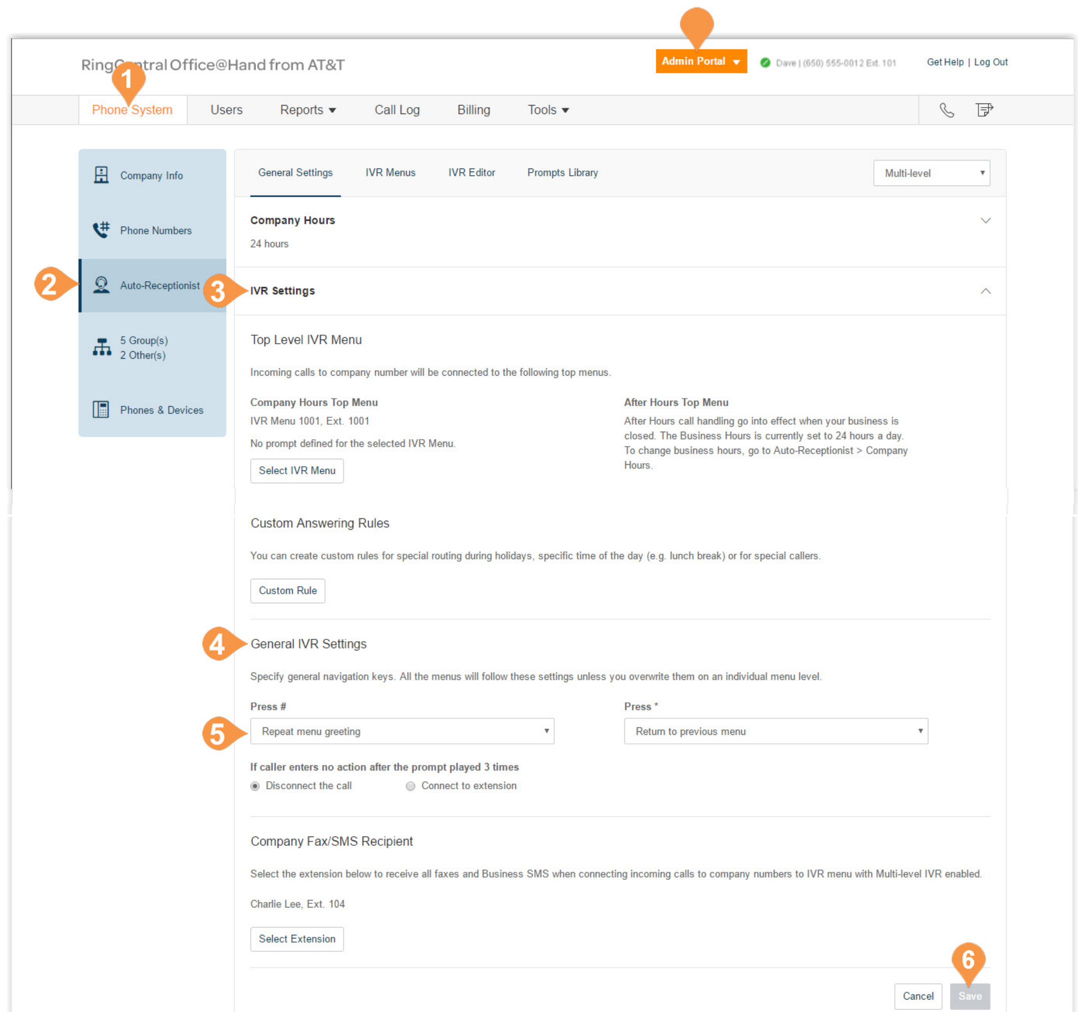
Set General IVR Settings

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. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Select **IVR Settings**.
4. Scroll down to **General IVR Settings**.
5. Under **General IVR Settings**, select options:
   - 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**
   - 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 directly to an extension:** The caller is routed to the extension you specify.

6. Click **Save**.



IVR Tool*

Office@Hand 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.

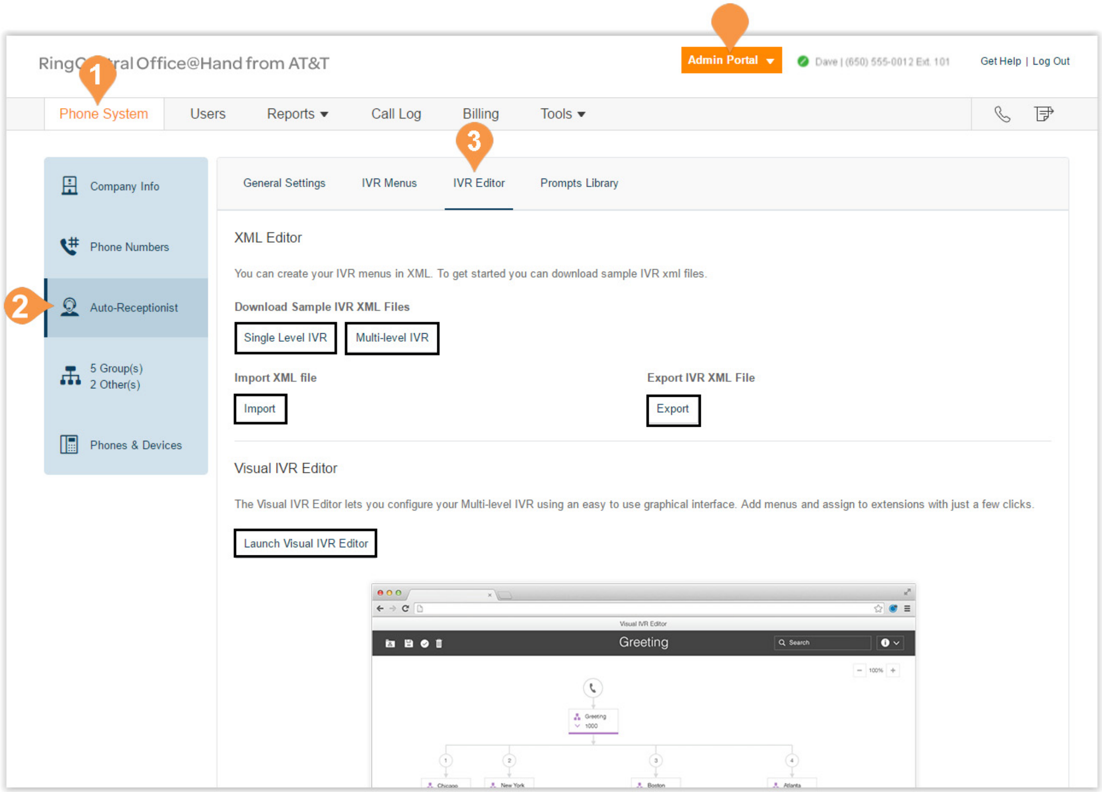
Use the IVR tool to:

- 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. From the **Admin Portal**, select the **Phone System** tab.
2. Select **Auto-Receptionist**.
3. Select the **IVR Editor** tab.



*Available for Office Premium and Enterprise users only.

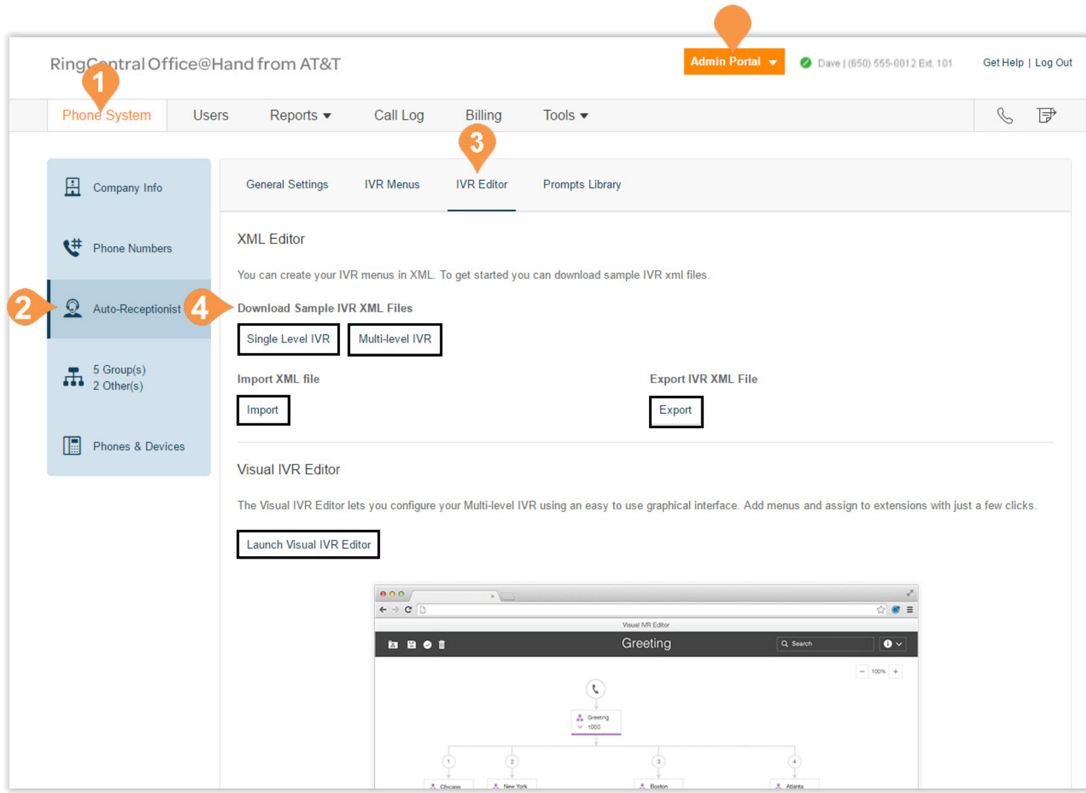
Import or Export XML Files

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

Download a Sample XML File

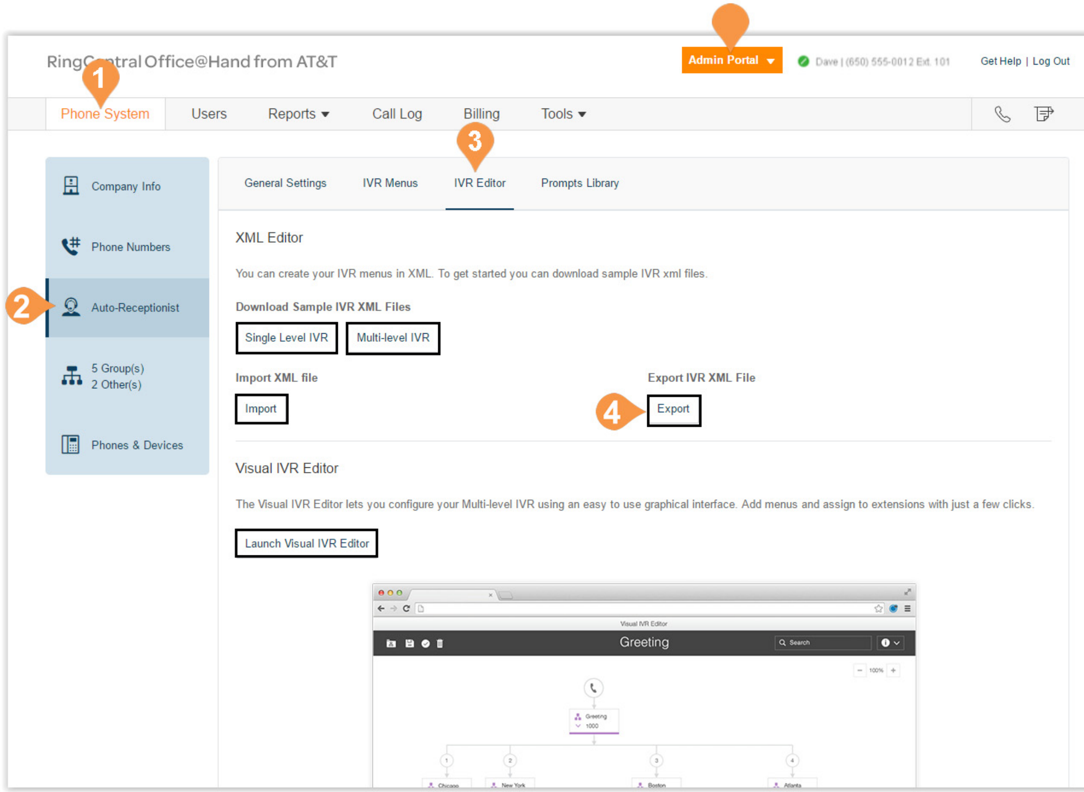
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab. the XML Editor displays.
4. Under **Download Sample IVR XML Files**,
   - Click Single Level IVR
   - Click Multi-level IVR

The sample XML file is downloaded to your browser.



Export an XML File

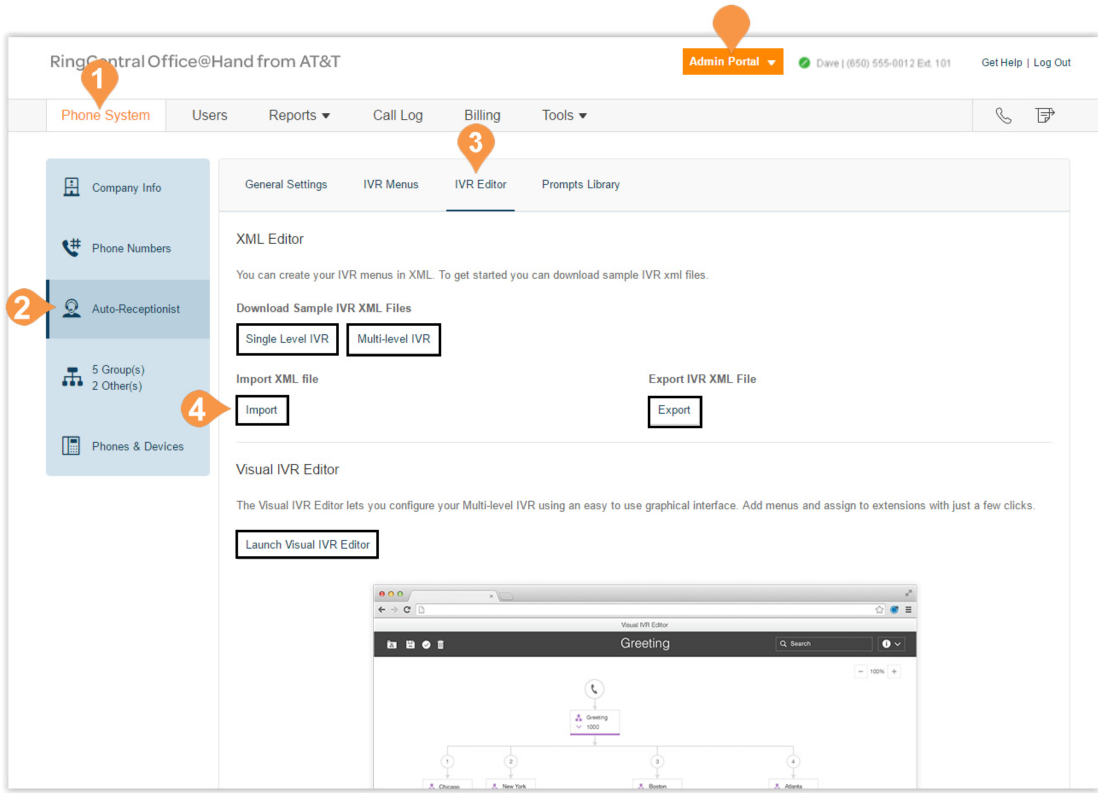
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab. The XML Editor displays.
4. Under **Export IVR XML File**, click **Export**. The sample XML file is exported to your browser.



Import an XML File

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

Office@Hand 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 Office@Hand online account.



IVR Menus

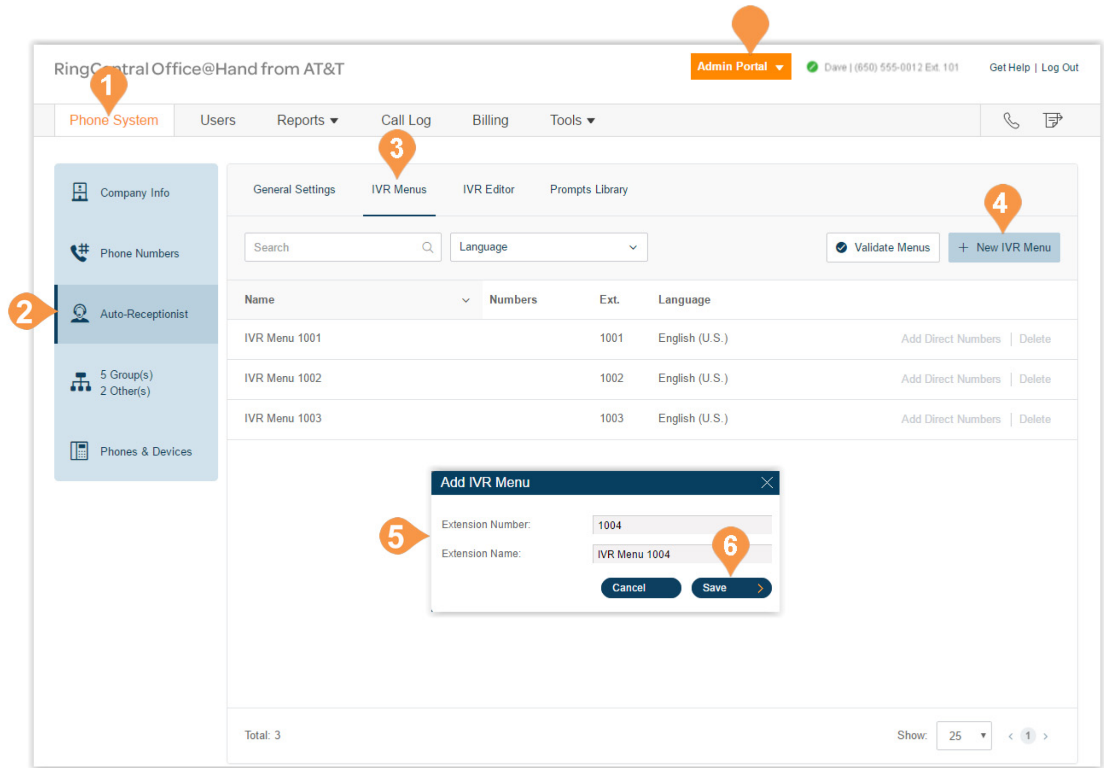
Office@Hand offers various tools to help manage and create IVR (interactive voice response) menus. Administrators can add new IVR menus as shown in the following instructions, use the Visual IVR Editor, or import an XML file.

Add an IVR Menu Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Click **New IVR Menu** button The **Add IVR Menu** pop-up appears.
5. Enter the **Extension Number** and **Extension Name**.
6. Click **Save**.

The new IVR Menu appears listed under the **IVR Menus** tab.Configure an IVR Menu

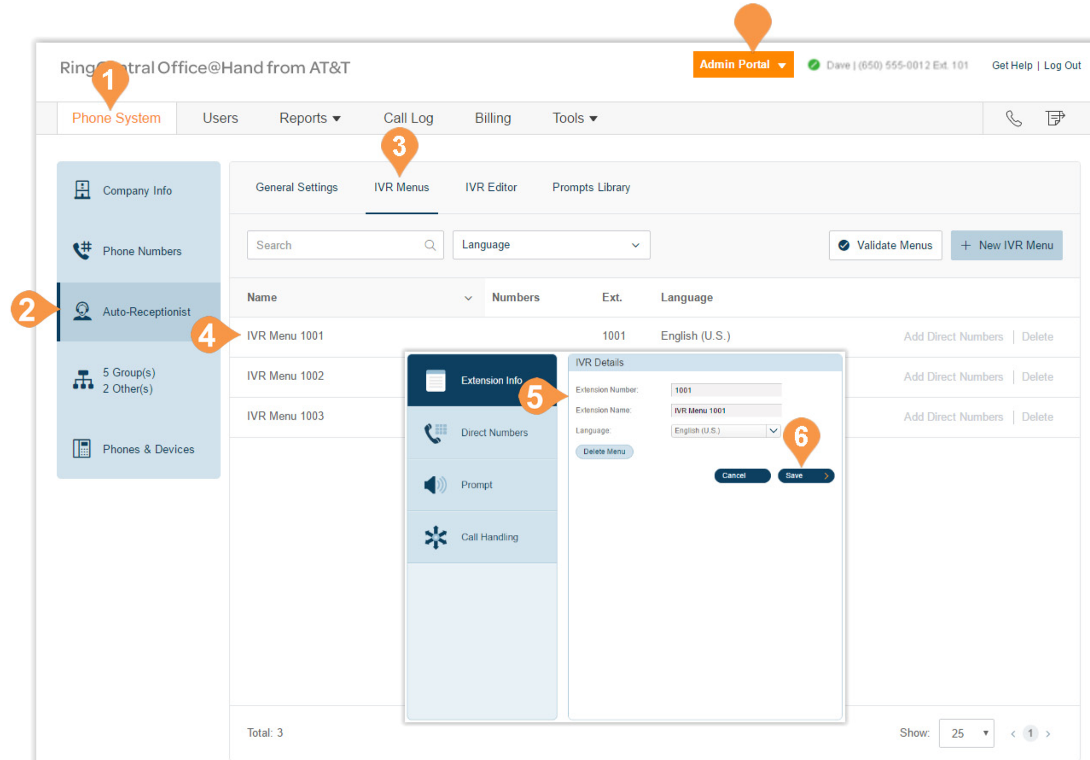
After you have created an IVR Menu, configure the Extension Info, Direct Numbers, Prompt, and Call Handling.



Configure Extension Info

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

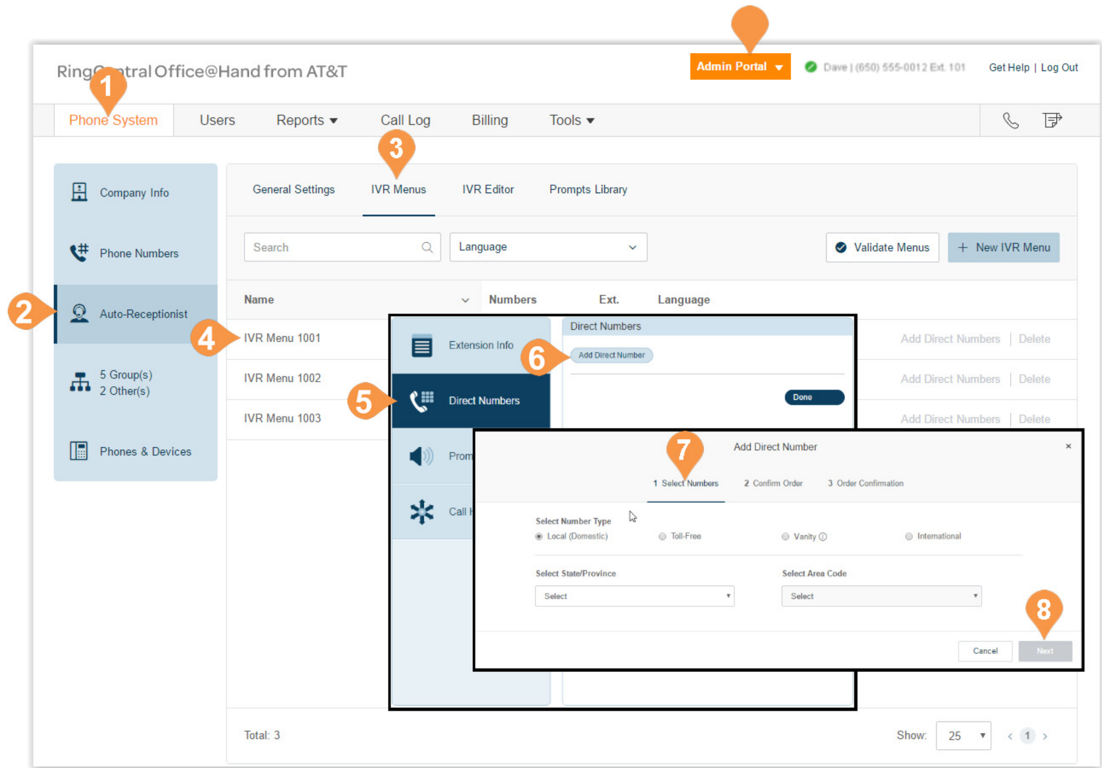
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Select an existing **IVR Menus**. The Extension Info **IVR Details** pop-up appears.
5. Enter the **Extension Number**, **Extension Name**, and set the **Language**.
    - If you would like to delete this IVR menu, click **Delete Menu**.
6. Click **Save**.



Add a Direct Number .

To add a direct number for an IVR menu:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Click an existing **IVR Menu**.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Select one of the number types. Follow these instructions for the type of number you choose:
   a. **Local (Domestic)**: Select the button for Local (Domestic). Provide the State/Province and Area Code and Select Number.
   b. **Toll-Free**: Select the button for **Toll-Free Number**. Select a Toll-Free prefix and a number from the drop-down menu.
   c. **Vanity**: Select the button for **Vanity**. Choose a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available.
   d. **International**: Select the button for **international**. Select the button next to **Geographic Number** or **Toll-Free Number**. Select the Country, call the phone number in the instructions to order an international number.
8. Click **Next** when finished choosing your number. Proceed to the completion of your order

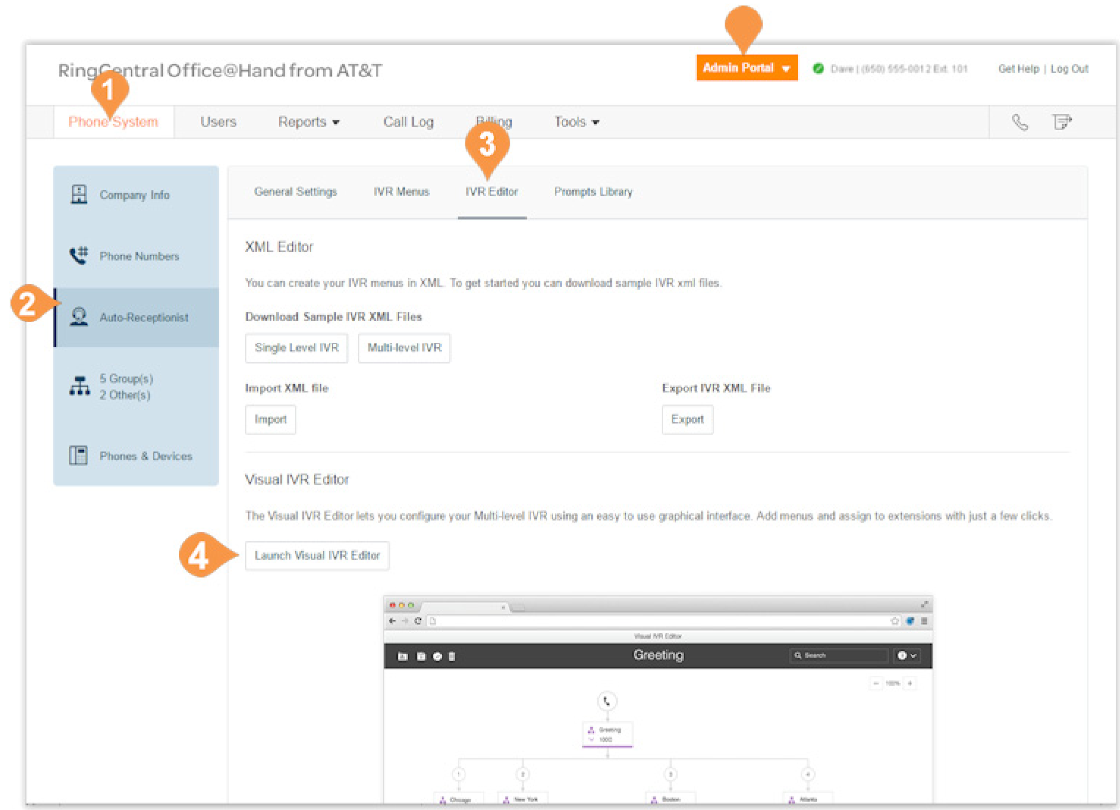


Visual IVR Editor

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.

Launch the Visual Editor

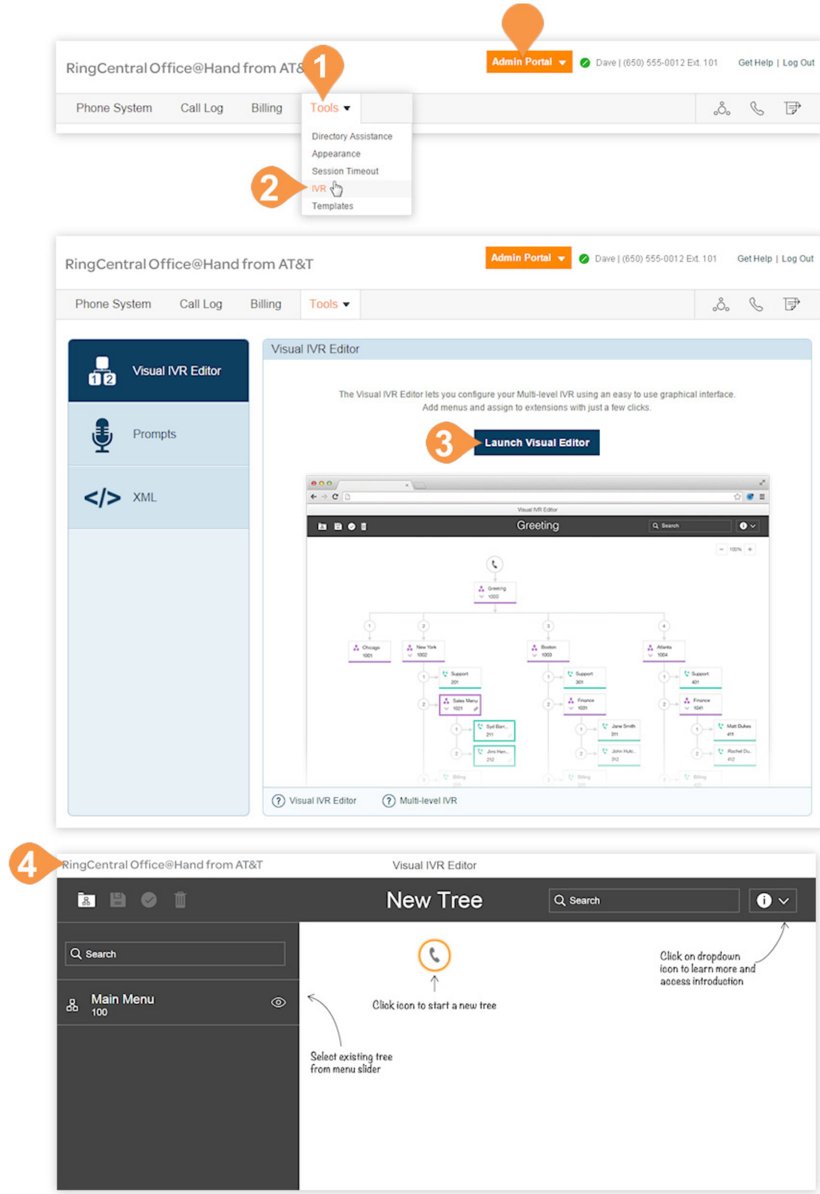
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Editor** tab.
4. Click **Launch Visual IVR Editor**. The **Visual IVR Editor** opens in a new browser tab.



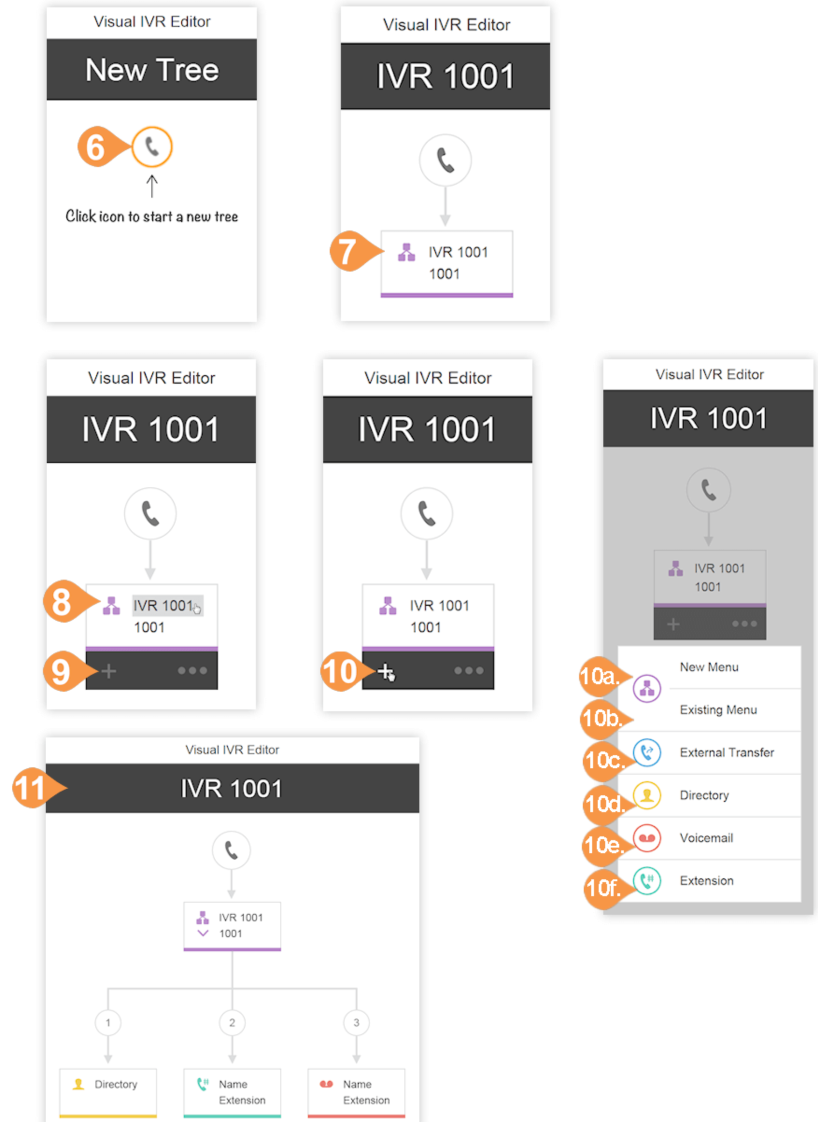
Create a New IVR Menu or Open an Existing IVR Menu

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

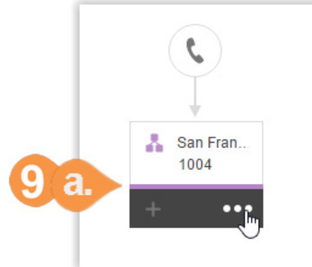
1. Open the Visual IVR Editor.
2. In the new tab, you will see your **Visual IVR Editor**. On this page, you will have a **New Tree** waiting to be created. You have the option to create a new IVR from this screen, or open an existing IVR and edit it in the Visual IVR Editor.
   a. In the upper-left corner of the screen you have icons for **Open Existing Menu**, **Save**, **Validate**, and **Clear Workspace**.
3. In the upper-right corner you have a **search bar**, an **information drop-down 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.

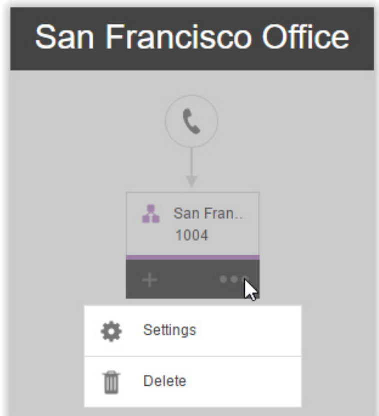


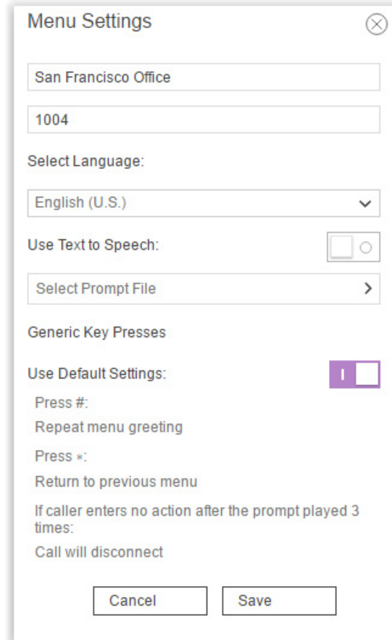
4. Click the **Phone icon** to start a new tree.
5. Your new tree will be automatically assigned a name and extension number.
6. Click the name or extension number to edit the text field and enter your preferred name and extension. Press enter when you are finished and the title will change automatically.
7. Hover over your new IVR menu to see more options.
8. 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.



9. 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.
   a. **IVR Menus**
      - Click the IVR name and extension text fields to edit them.
      - Click "+" to add sub-items to your tree.
      - Click "…" to open the menu for Settings and Delete.
      - Click **Settings** to edit your IVR Menu settings just as you would edit them in the IVR Group settings.
      - Click **Delete** to delete this item.





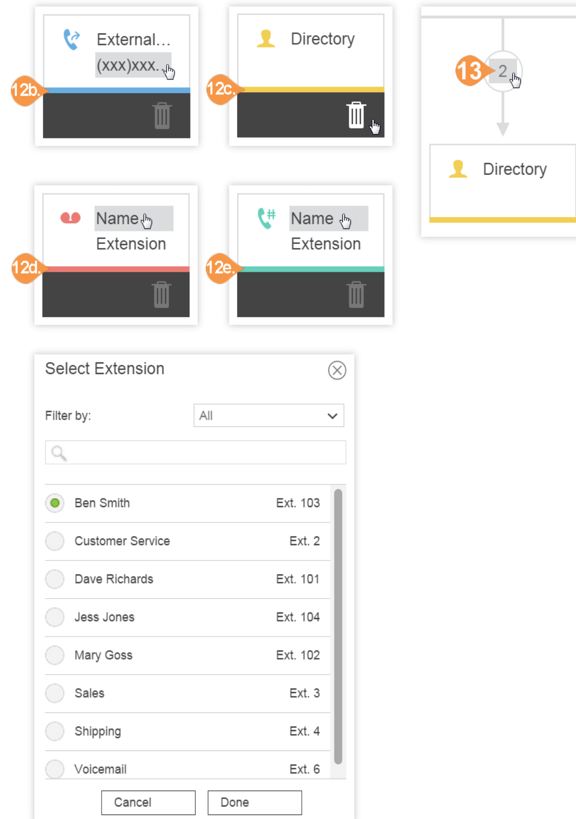


b. **External Transfer**
- Click the phone number text field to enter the external transfer number of your choice.
- Click the trash can icon to delete this item.

c. **Directory**
- No further configuration is needed.
- Click the trash can icon to delete this item.

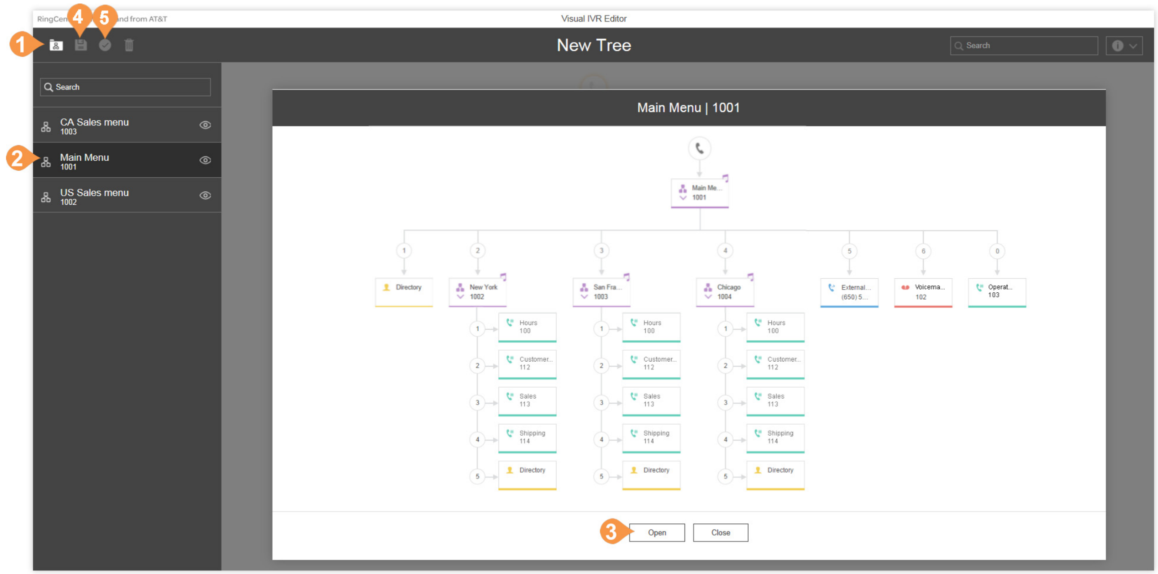
d. **Voicemail**
- Click the name or extension text fields to open a menu to choose an existing user's extension.
- Click the trash can icon to delete this item.

e. **Extension**
- Click the name or extension text fields to open a menu to choose an existing user's extension.
- Click the trash can icon to delete this item.
- You can also change the order and key press of an item by click on the existing number and typing a new number.
- Click out to save.



Edit an Existing IVR Menu with the Visual IVR Editor

1. From the **Admin Portal**, launch the Visual Editor, then click the **Open Existing Menu icon**.
2. Click on an existing menu to see a preview of the menu.
3. Click **Open** to be able to edit the menu in the Visual IVR Editor.
4. After editing your menu, click the **Validate icon** to check your IVR menu.
5. Click the **Save icon** once you are done editing to save your IVR.



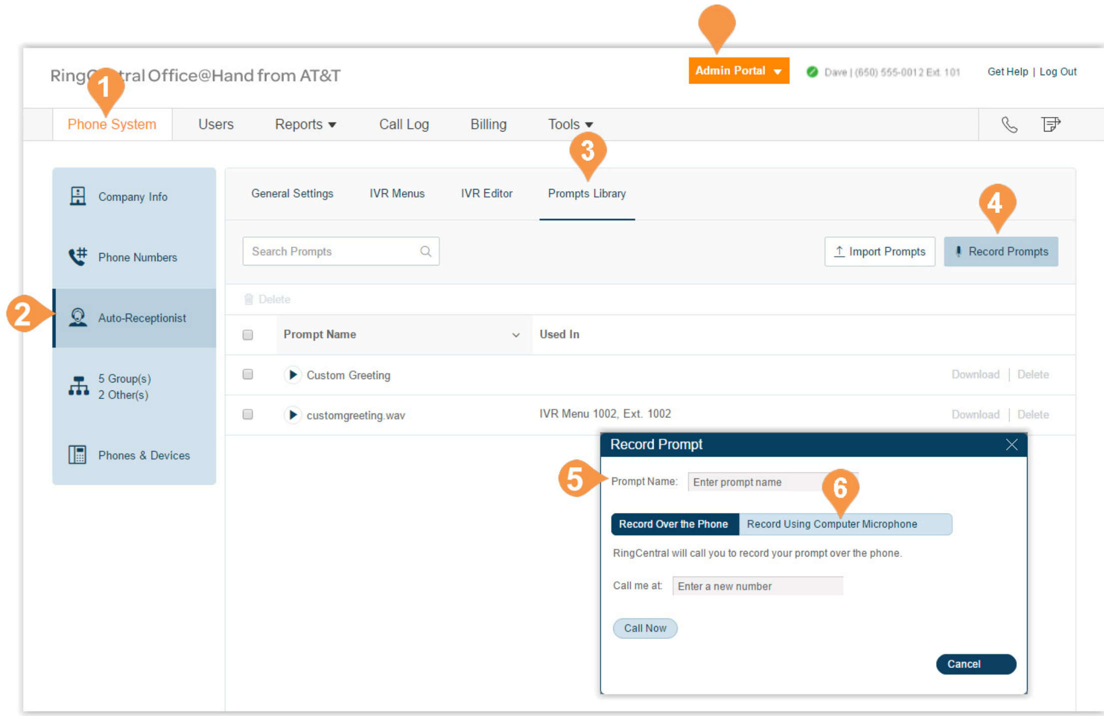
Prompts

Prompt recordings guide callers with instructions on keys to press. Prompts can be pre-uploaded and saved to the Prompt 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 Office@Hand'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.



Record an Audio Prompt

To record a new audio prompt for your system,

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Select the **Prompts Library** tab.
4. Click **Record Prompts**. The **Record Prompts** pop-up appears.
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:
   - Record Over the Phone
   - Record Using Computer Microphone.

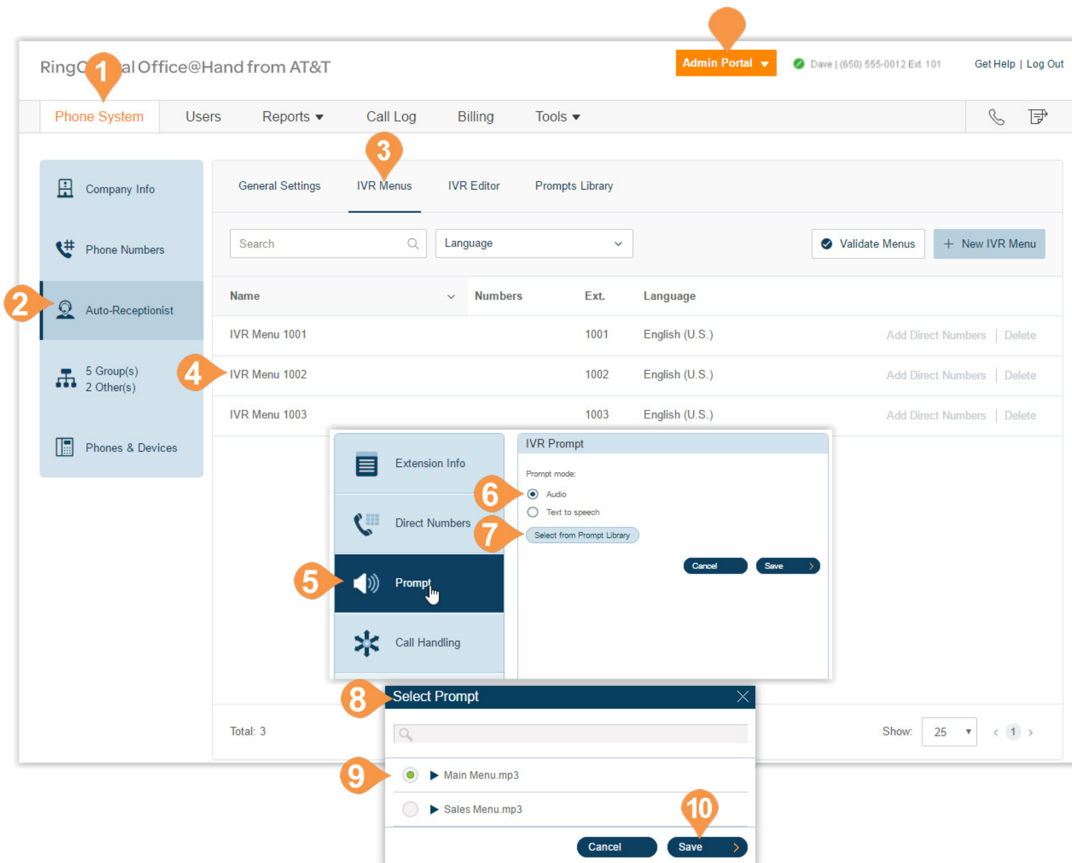
Follow the remaining on screen instructions to record your prompt.

Select Prompt Mode: Audio

To select a previously recorded audio prompt, do the following:

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

You can listen to your new prompt by dialing into the extension and re-recording it until you are satisfied.

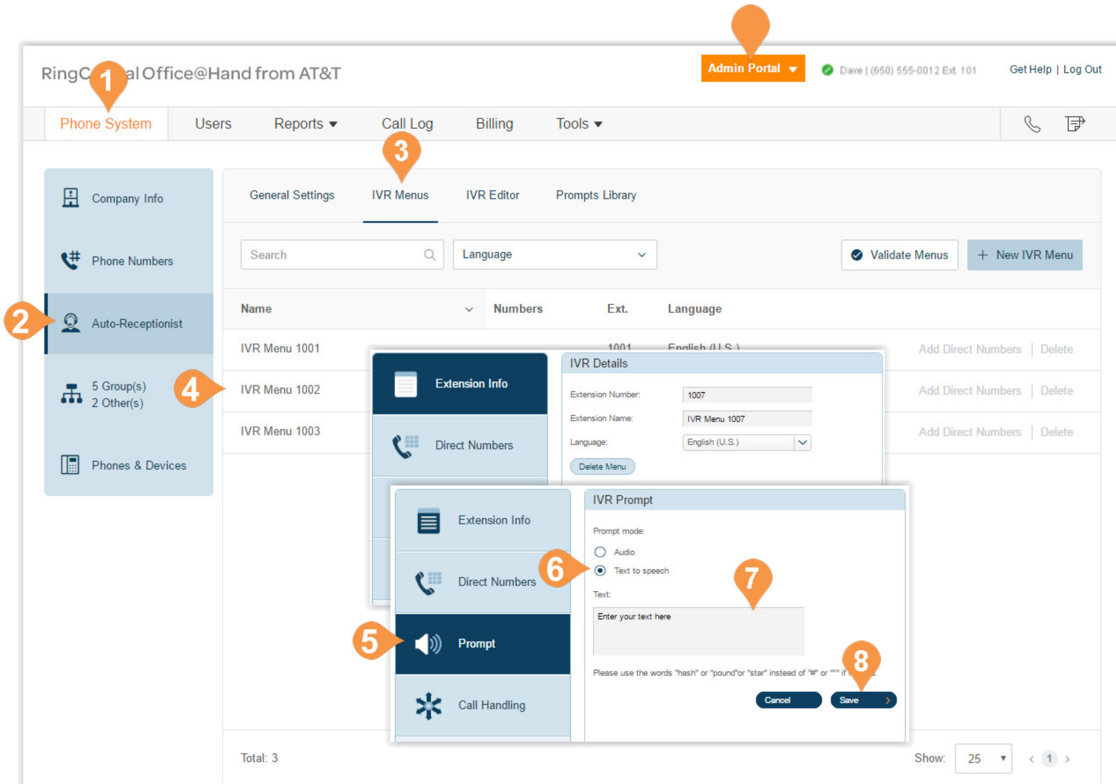


Select Prompt Mode: Text-to-Speech

Office@Hand'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. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **IVR Menus** tab.
4. Select an existing **IVR Menu. The Extension Info appears.**
5. Click **Prompt**. The IVR Prompt pop-up appears.
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.**



Recording Greetings and Messages

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

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

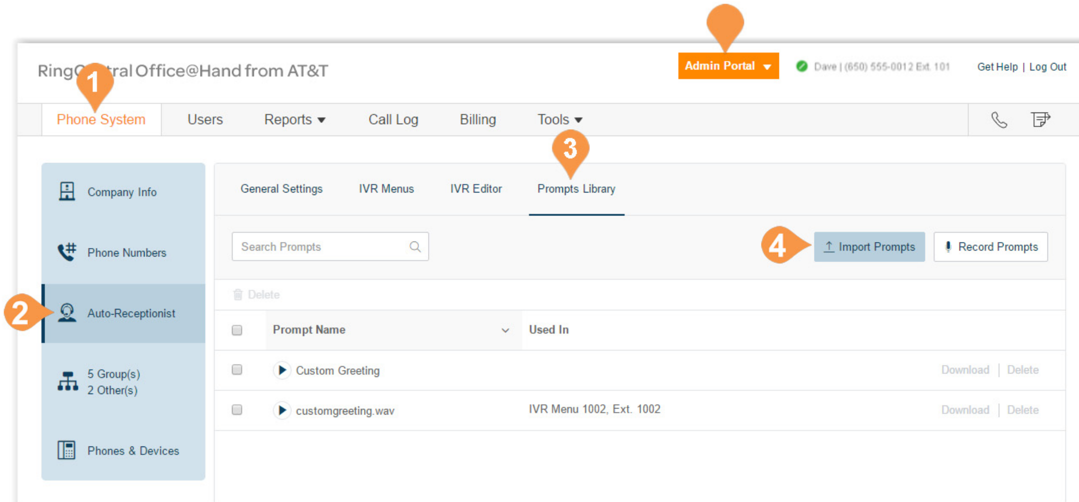
Import a WAV file for Your IVR Prompt

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. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click the **Prompts Library** tab.
4. Click the **Import Prompts** button.

A browser appears.

- Navigate to the prompt file location.
- Select the file and click **Open**.



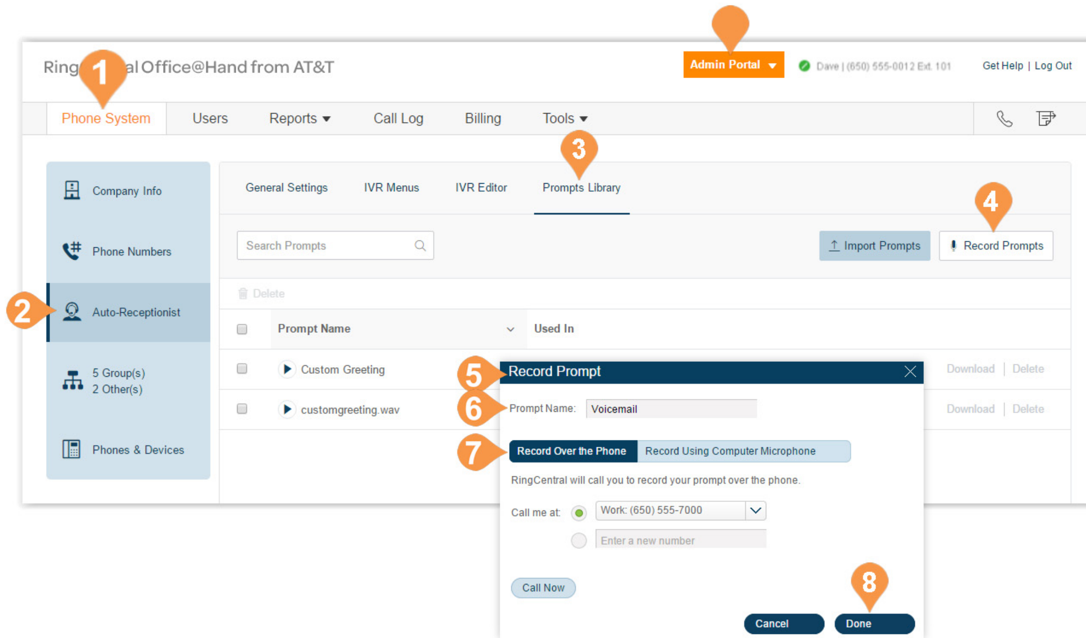
Record a Prompt over the Phone

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 Office@Hand phone.

1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. The **Record Prompt** pop-up appears.

Enter a name in the text field next to **Prompt Name**.

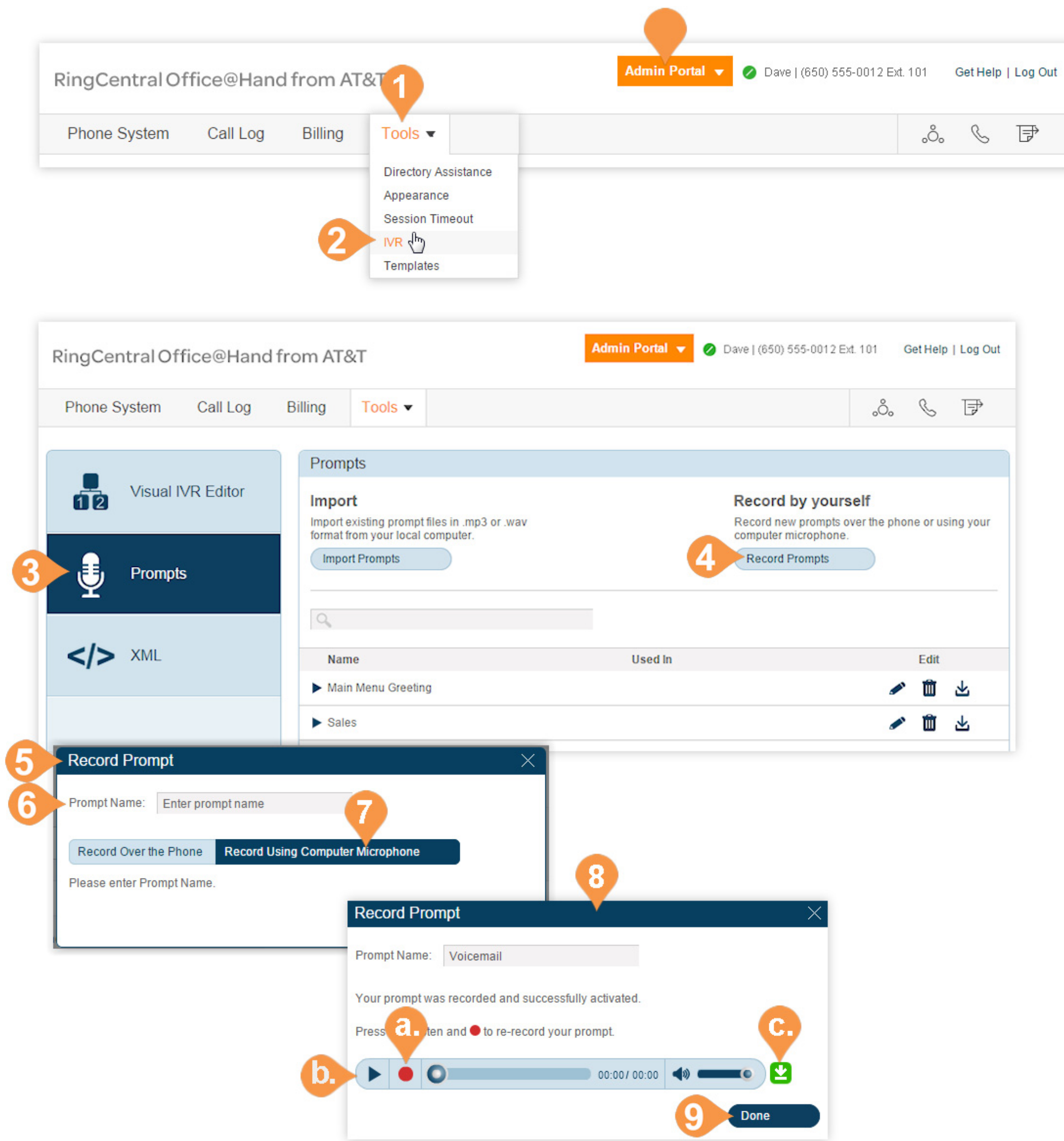
6. Click **Record Over the Phone**.
    - Next to **Call me at**, choose a phone number from the drop-down menu if you have saved numbers or type a phone number in the text field.
    - Click the **Call Now** button, and Office@Hand will call you to record your message. Record your IVR prompt over your phone when prompted.
7. Click **Done**.



Record 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. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Click **Prompts Library**.
4. Click **Record Prompts**.
5. A pop-up will appear.
6. Enter a name for your prompt.
7. Click **Record Using Computer Microphone**. Click **Allow** if Office@Hand asks to record through your computer.)
8. The **Record Prompt** pop-up appears.
   a. When ready, click the red **Record** button to record or re-record your IVR prompt through your computer microphone.
   b. Click the **Play** button to listen to your prompt and then click the Record button to re-record your IVR prompt.
   c. Click the **Download** button to and save your recording to your computer.
9. Click **Done**.

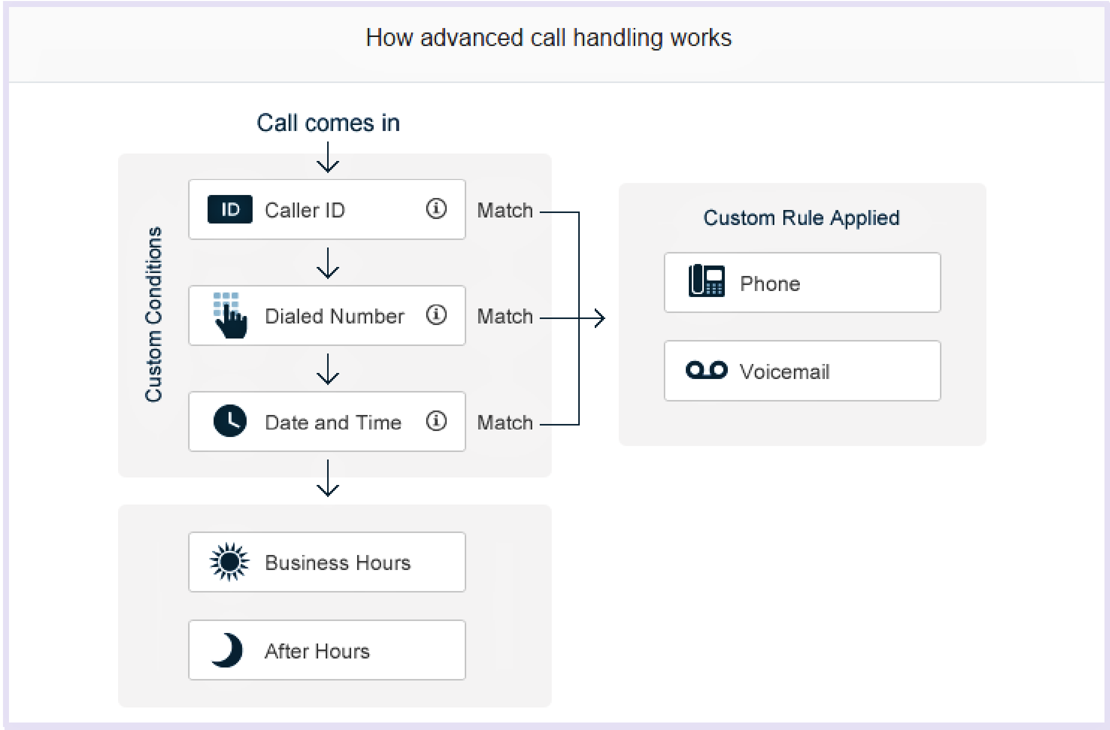


Custom Rules

Custom rules let you manage call handling enabling you to create efficient processes and streamline your work flow.

When your call enters the Office@Hand system it is filtered through any conditions you have set, for example Caller ID, Dialed Number, or Date and Time. You can also apply business hours or after hours conditions to incoming calls. These conditions are passed to the destination phone or voicemail.

Once you create a custom rule, be sure to test the rule to verify it works as you expect.

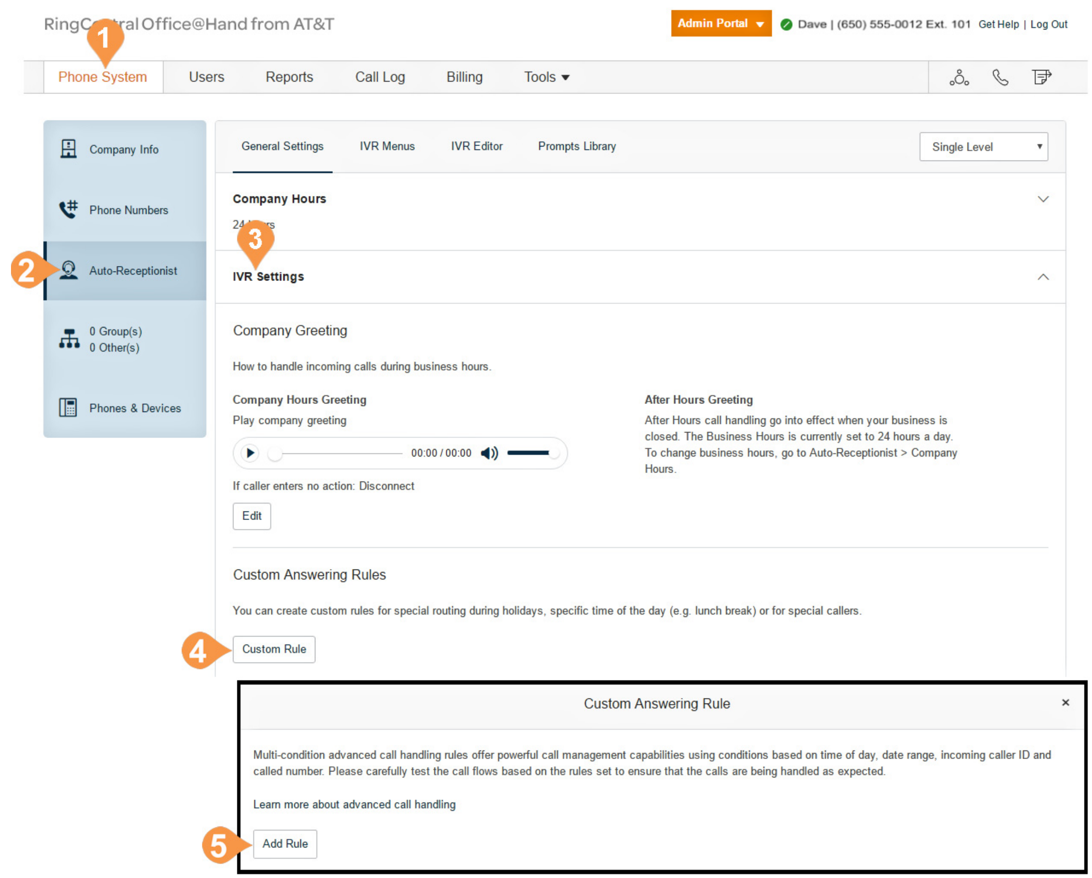


Create a Custom Rule

Additionally, any previously-created rules are listed in the pop-up that appears.

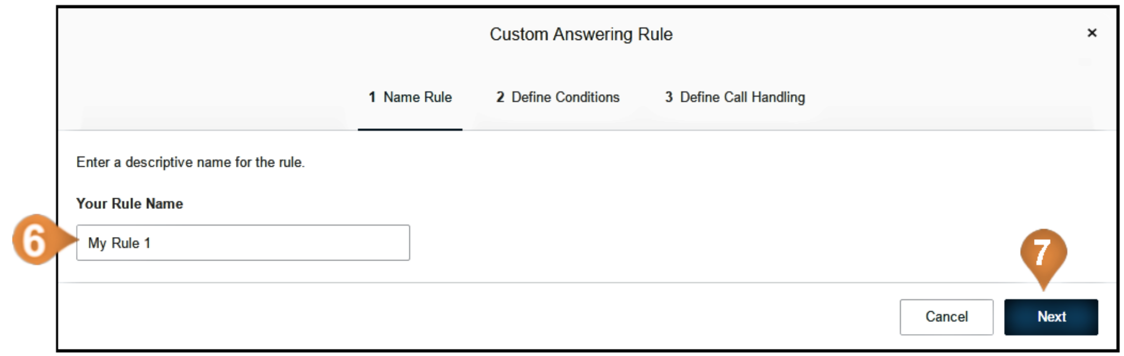
1. From the **Admin Portal**, click the **Phone System** tab.
2. Click **Auto-Receptionist**.
3. Under the **General Settings** tab, click **IVR Settings**.
4. Under **Custom Answering Rules**, click **Custom Rule**.
5. Click **Add Rule**. The **Custom Answering Rule** pop-up appears.

Instructions continue on the following pages.



6. Enter the **Rule Name**.
7. Click **Next**.
8. Click one of the answering rule conditions:
    - CallerID
    - Called Number
    - Date and/or Time.

Instructions continue on the following pages.

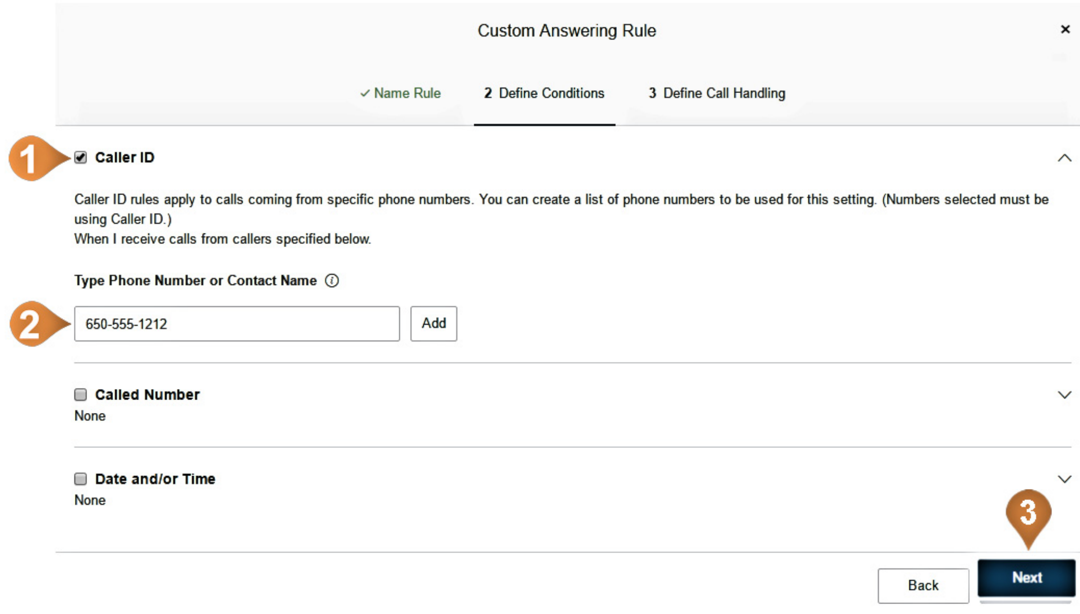


Custom Rule Condition - Caller ID

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

Follow the previous steps, “Custom Rules” on page 66, then:

1. Click the answering rule conditions, CallerID.
2. Enter the phone number or contact name and press **Add**.
3. Click Next. the **Custom Answering Rule** pop-up appears. Go to “Custom Rule Call Handling Definitions” on page 72.

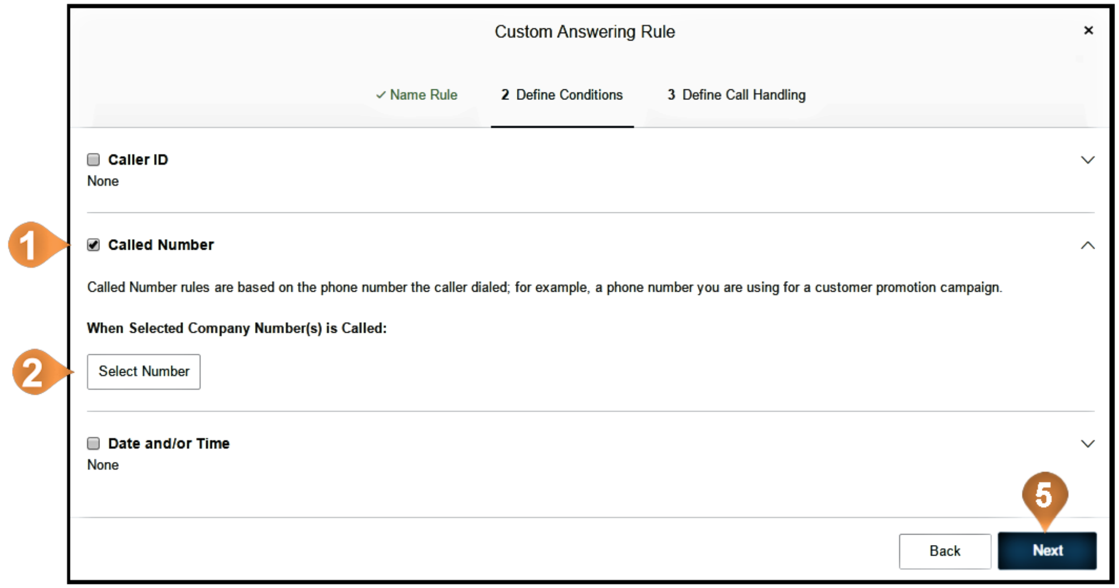


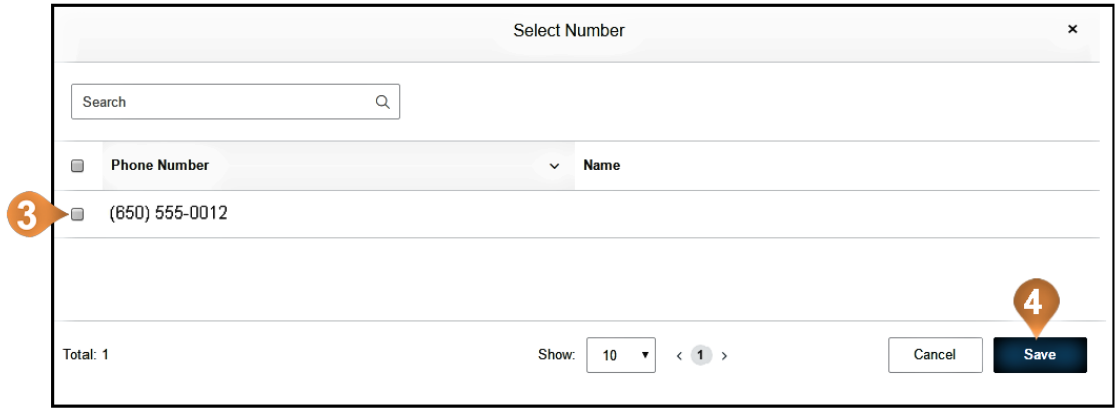
Custom Rule Condition - Called Number

Called Number applies the rule to the phone number dialed.

From the previous steps, then:

1. Click the answering rule condition, **Called Number**.
2. Click the check box **Select Number**. The **Select Number** pop-up appears.
3. Click the **Select Number** button.
4. Click **Save**.
5. Click Next. Go to "Custom Rule Call Handling Definitions" on page 72.

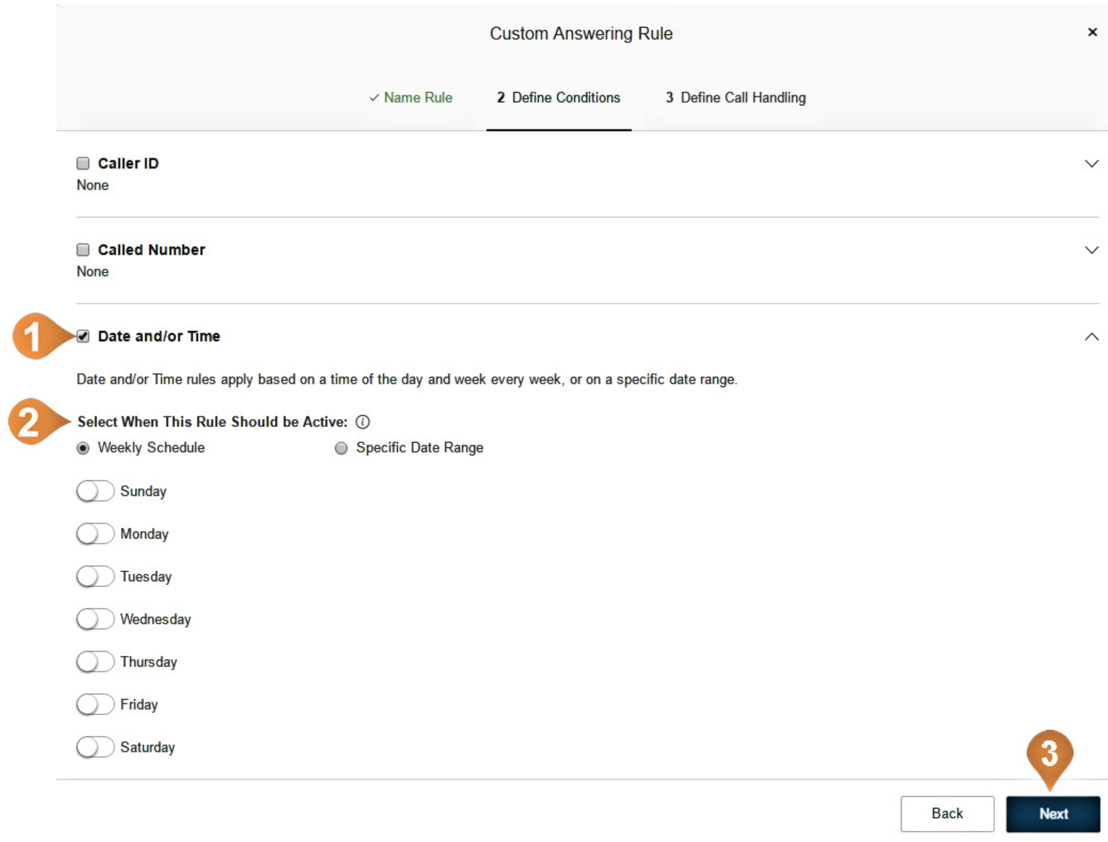




Custom Rule Condition - Date and/or Time

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

1. Click the answering rule condition, **Date and/or Time**.
2. **Select When this role Should be Active**.
3. Click **Next**. Go to “Custom Rule Call Handling Definitions” on page 72.



Custom Rule Call Handling Definitions

From setting a rule condition, now define the call handling for that rule.

1. **Select Action to Take When Incoming Calls Match This Rule**:
   - Choose to **Play Company Greeting** or **Bypass greeting to go to extension**.
   - **Set Greeting -** Choose **Default** or **Custom**. The default greeting is shown in the window. Select **Custom** to create your own.
   - **If Caller Enters no Action -** Choose whether the call is routed to the operator or disconnected if the caller does not enter an action.
2. Click **Done**.

Call Groups

Call Groups

Office@Hand offers many different types of groups for your phone system needs.

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.

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. This feature is commonly required in many industries, such as retail, restaurant, warehouse, etc.

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 of permissions that allow specific users to monitor the calls of other users. Available for Premium and Enterprise users only.

Other – Message-Only Extensions allow you to create a dedicated extension specifically for receiving voice messages. All calls routed to this extension will be automatically directed to the extension's voicemail box.

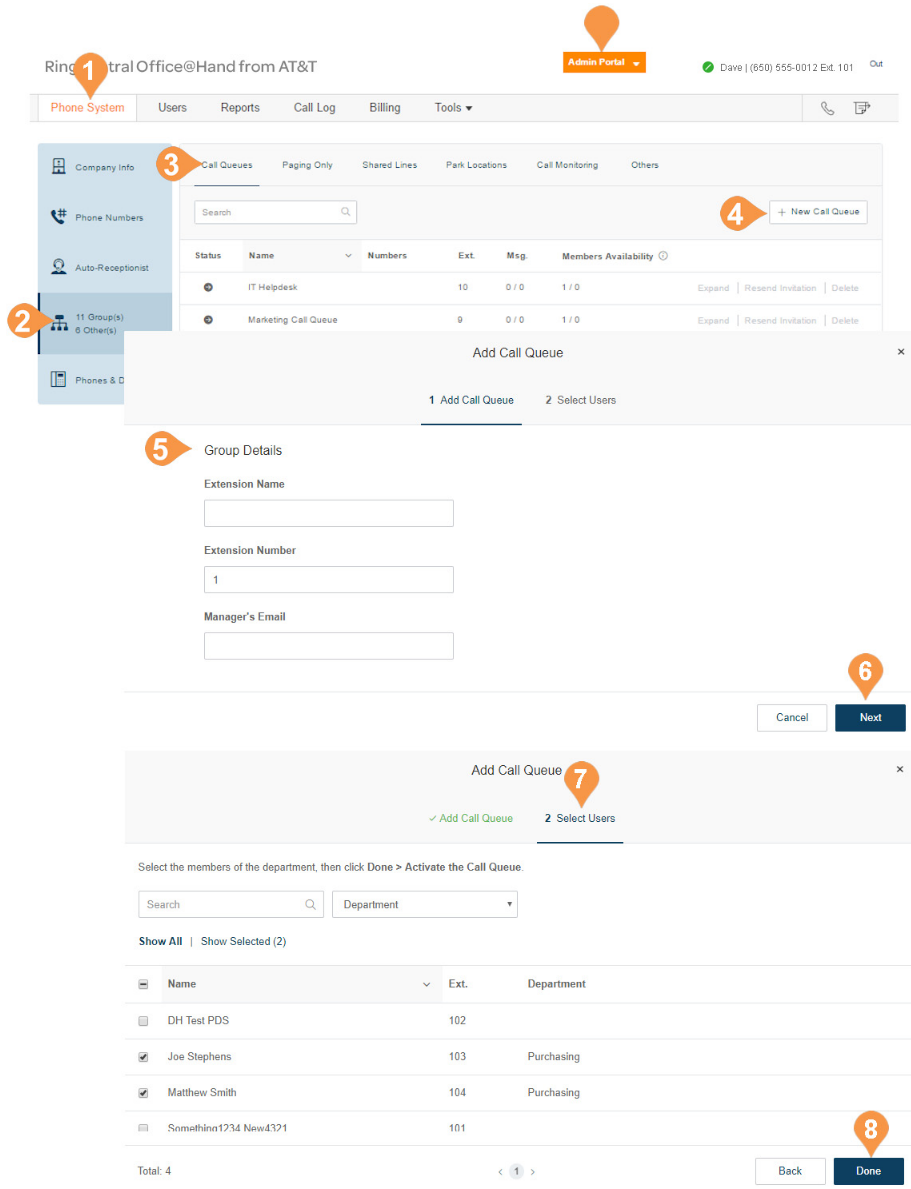
Other – Announcements-Only Extensions allow you to create a dedicated extension specifically for playing an announcement. All callers routed to this extension will only hear a recorded announcement/greeting.

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.

Add a Call Queue Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Click the **New Call Queue** button.
5. Enter an **Extension Number**, **Extension Name**, and **Manager Email**.
6. Click **Save**.
7. Select the users you'd like to add to the group from the list of available members.
8. Click **Save**.

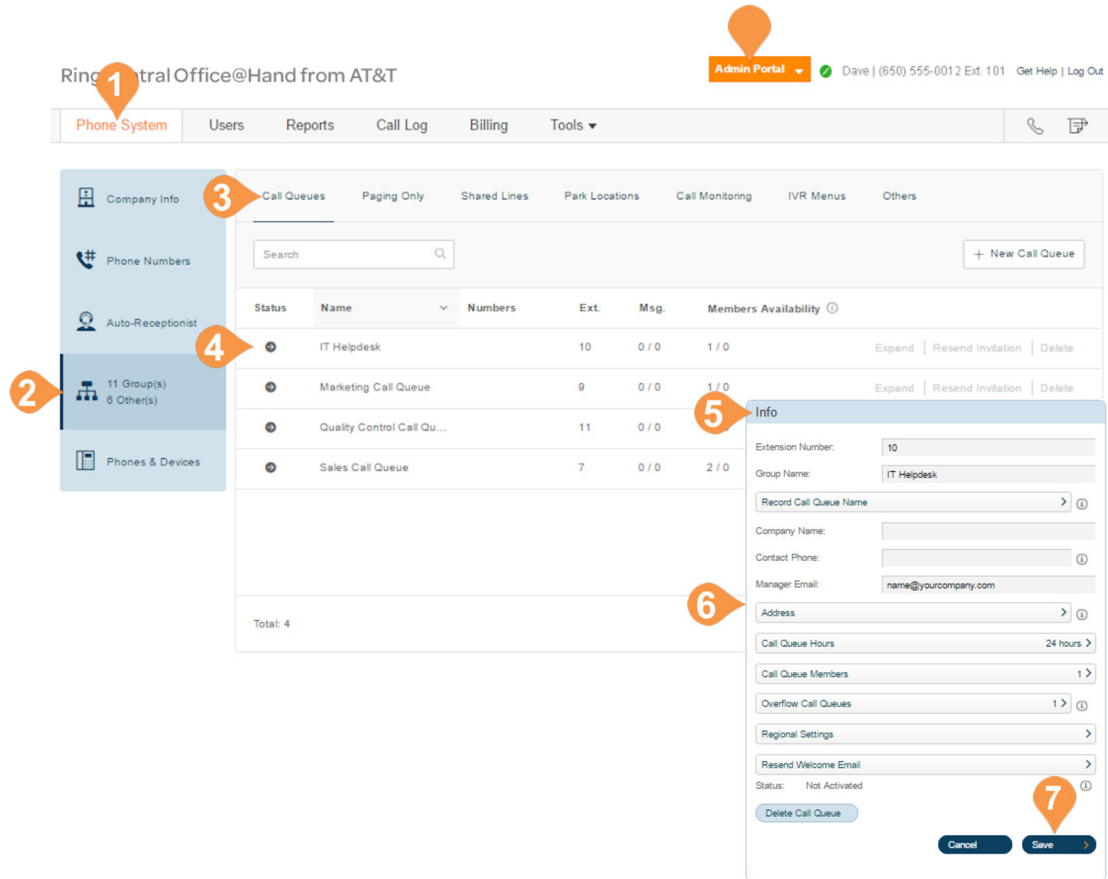


Configure a Call Queue

After you have created a Call Queue, you can configure the Call Queue Info, Direct Numbers, Greeting, Call Handling, and Messages & Notifications. The phone system supports more than 10 call queue agents ringing simultaneously. This setting needs to be first enabled in the RingCentral Admin Tool. Admin users can set the number of simultaneously ringing call queues to 25 or 50. Note: Only agents with 2 active phones in call forwarding can be added to queues with higher limits (25 or 50).

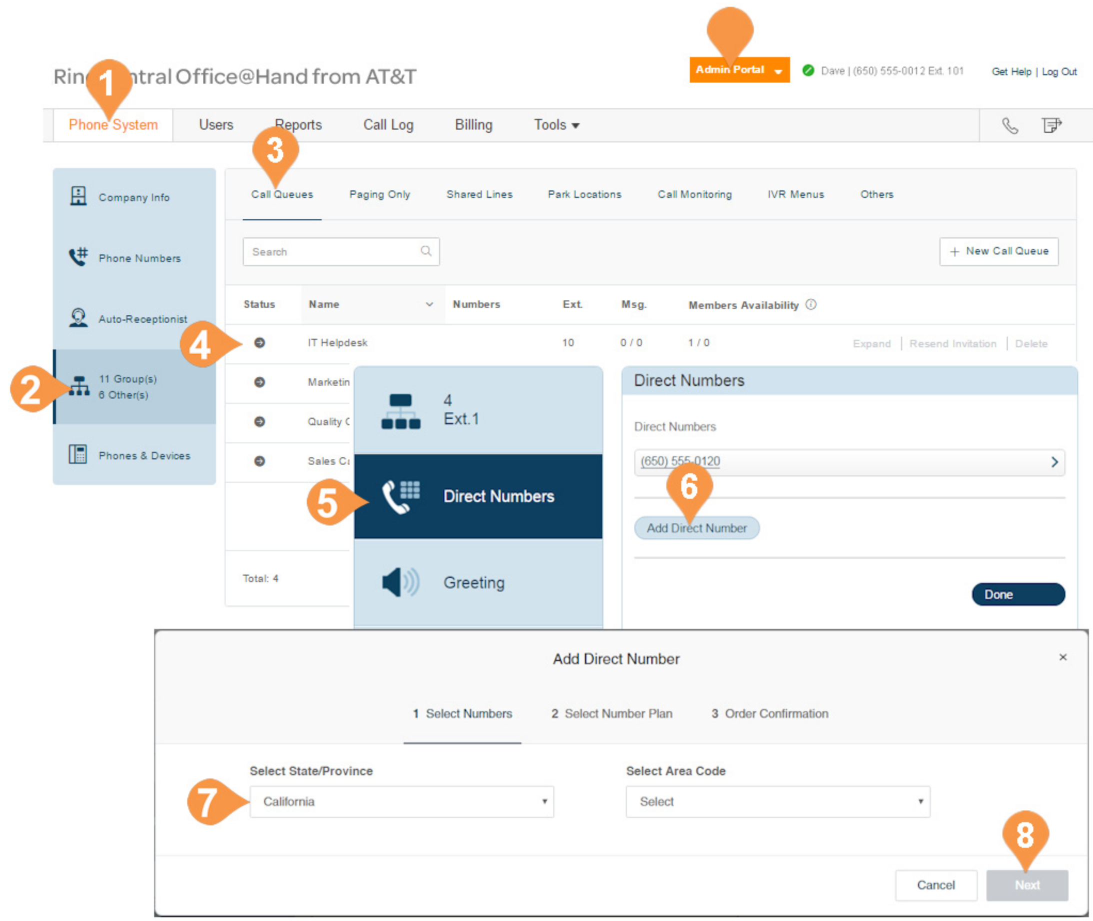
Call Queue Info

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue** (Customer Support in this example). If you don't have any existing Call Queues, go to the previous page to learn how to create one.
5. Click **Call Queue Info** to edit your call queue settings.
6. Edit your settings:
   a. **Extension Number:**
   b. **Group Name:**
   c. **Record Call Queue Name**
   d. **Company Name**
   e. **Contact Phone**
   f. **Manager Email**
   g. **Address**
   h. **Call Queue Hours**
   i. **Call Queue Members**
   j. **Regional Settings**
   k. **Resend Welcome Email**
   l. **Delete Call Queue**
7. Click **Save**.



Add a Direct Number

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue**.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Select the **State/Province** and **Area code** then select from one of the available numbers.
8. Click **Next**.
9. Follow the prompts to purchase your new number.

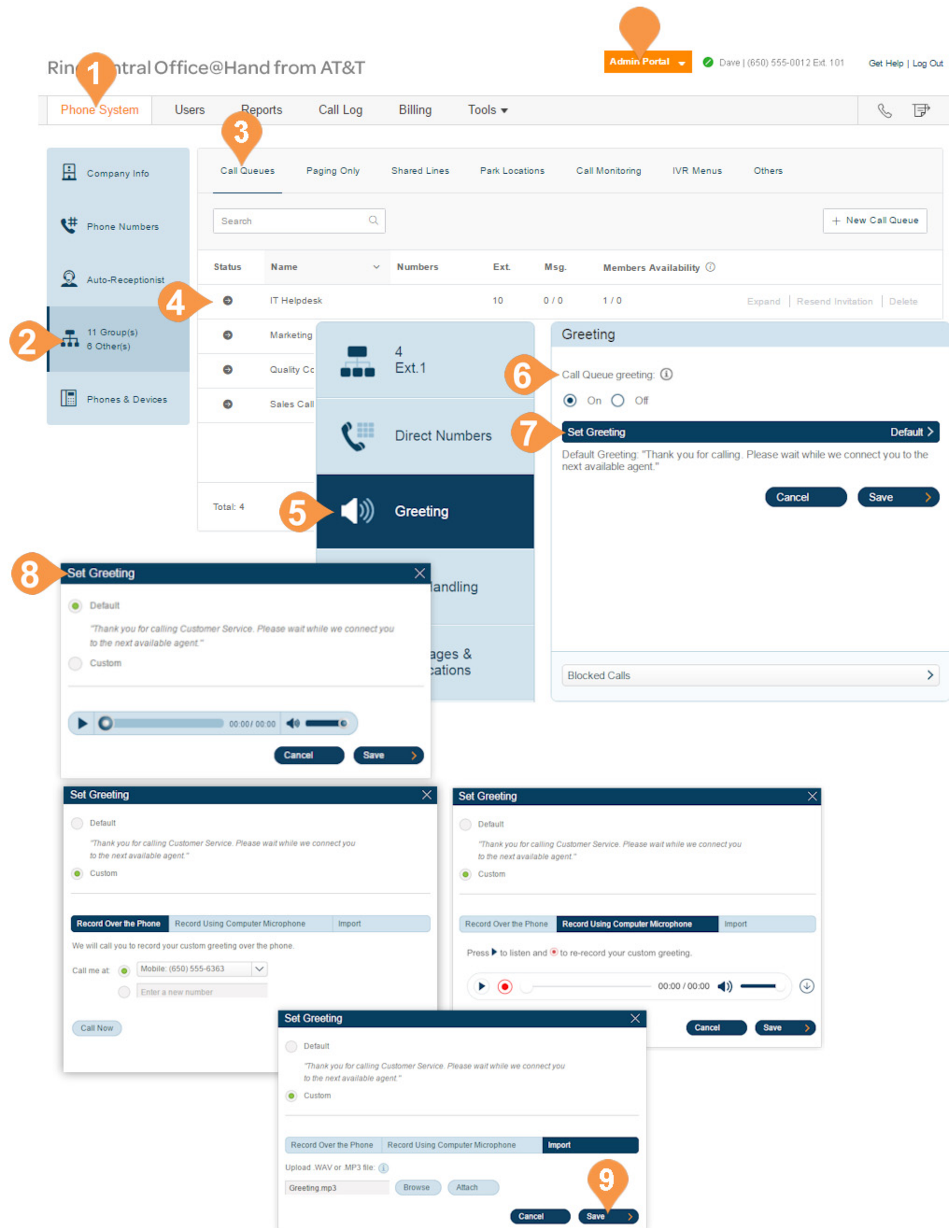


Call Queue Greetings

If you would like your callers to hear a recorded greeting before being connected to a call group, turn on the Call Queue greeting.

Set a Call Queue Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select an existing **Call Queue**.
5. Click **Greeting**.
6. Select the button next to **On**.
7. Click **Set Greeting**.
8. A pop-up window will appear displaying the current **Greeting**. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, 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 Using Computer Microphone**
        Click **Allow** if Office@Hand 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 **Attach**.
9. Click **Save**.

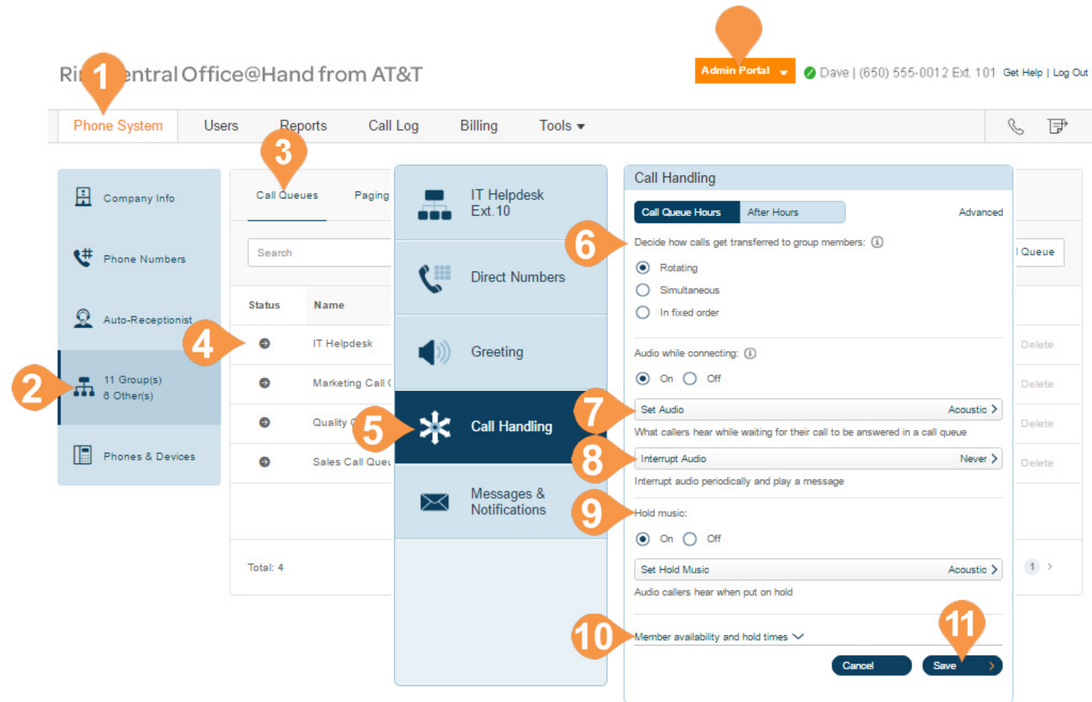


Call Handling

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, choose the audio while connecting, hold music, and hold time here.

1. From the **Admin Portal,** select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Click the name of the **Call Queue** to configure.
5. Select **Call Handling** to edit your call handling settings.
6. Select the way in which calls will be transferred to department members:
   a. **Rotating** – in order by extension number
   b. **Simultaneous** – on all department extensions
   c. **In fixed order** – set a defined order
7. Click **Set Audio** to select the audio callers will hear during business hours while waiting for a connection.
8. Click **Interrupt Audio** to choose how often the audio will be interrupted by a prompt. If you choose an interrupt time, you can then choose a standard Interrupt Prompt, such as "Thank you for holding. Please continue to stay on the line," or record or upload your own custom prompt.
9. Click **Set Hold Music** to choose the audio callers will hear while on hold.
10. Choose how to handle callers who are on hold in the **Member availability and hold times** menu. Tool tips in the product interface provide information on configuring hold times.
11. Click **Save**.

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

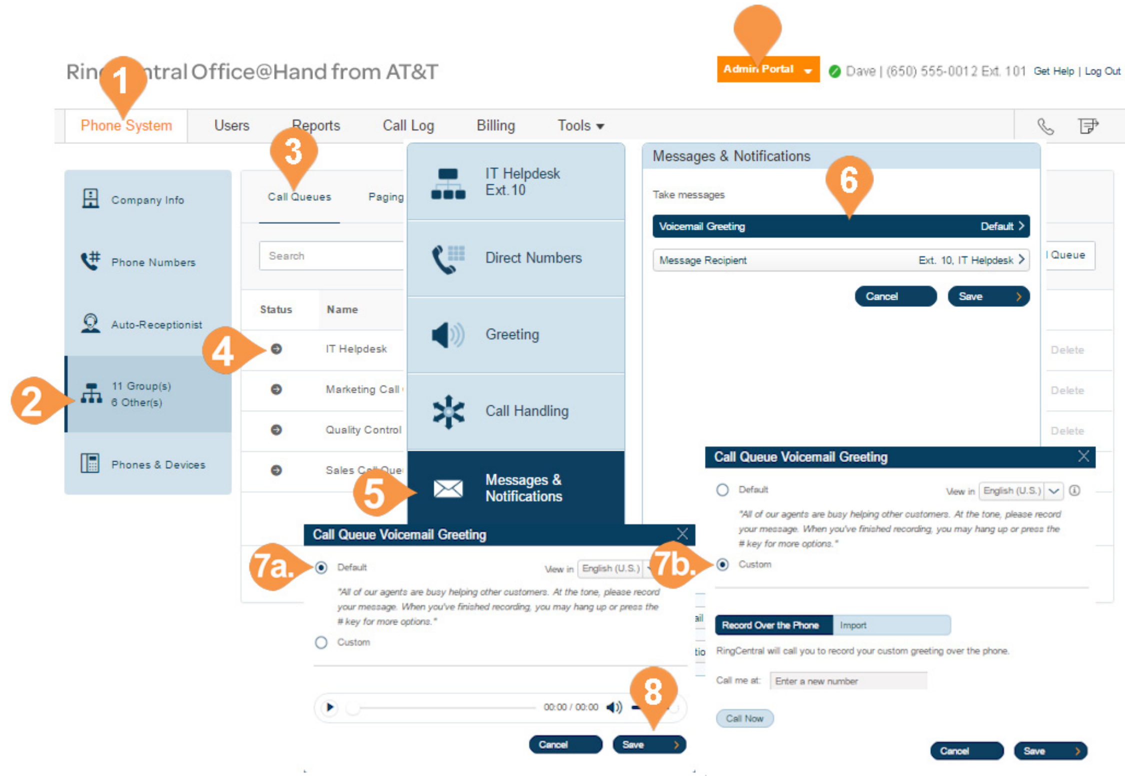


Messages & Notifications

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

Set a Voicemail Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select a **Call Queue** (Customer Support in this example).
5. Click **Messages and Notifications.**
6. Click **Voicemail Greeting.**
7. A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, 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 Office@Hand will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand 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 **Attach.**
8. Click **Save.**

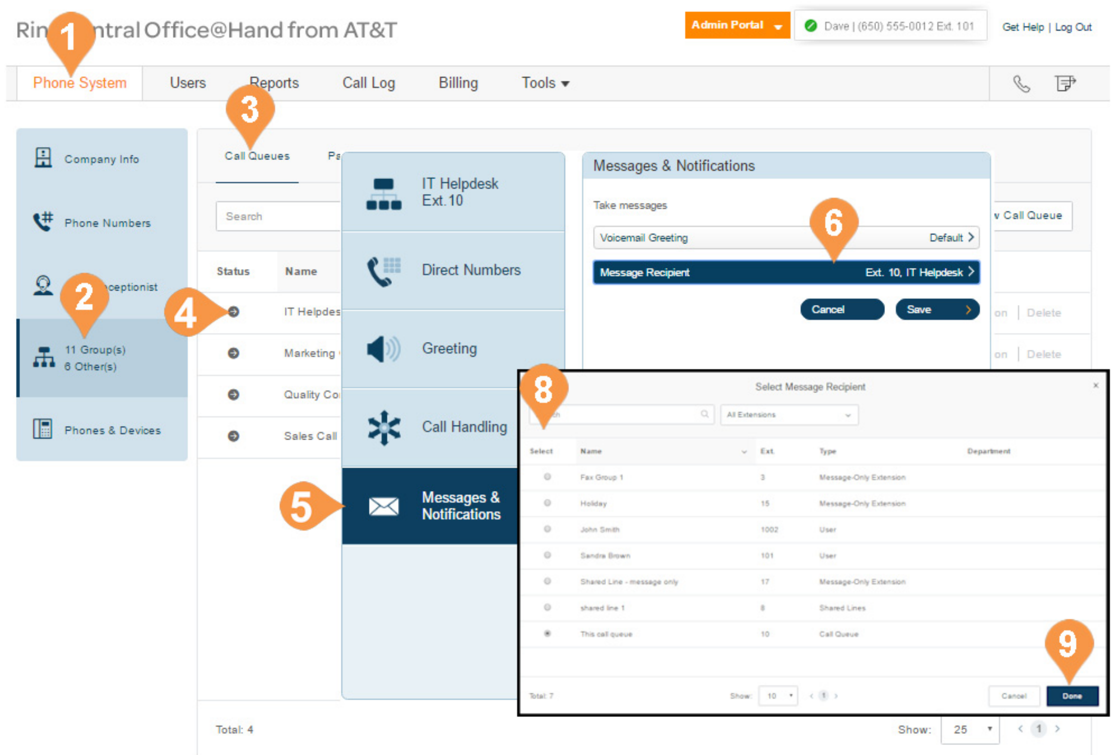


Message Recipient

After you have set your Voicemail Greeting, you can set which users or call queues are to receive the messages.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select a **Call Queue** (Customer Support in this example).
5. Click **Messages and Notifications**.
6. Click **Message Recipient**.
7. A pop-up 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**, then click **Save**.

Note: If you have set custom Company hours, follow these steps for both the Company Hours and After hours tabs.

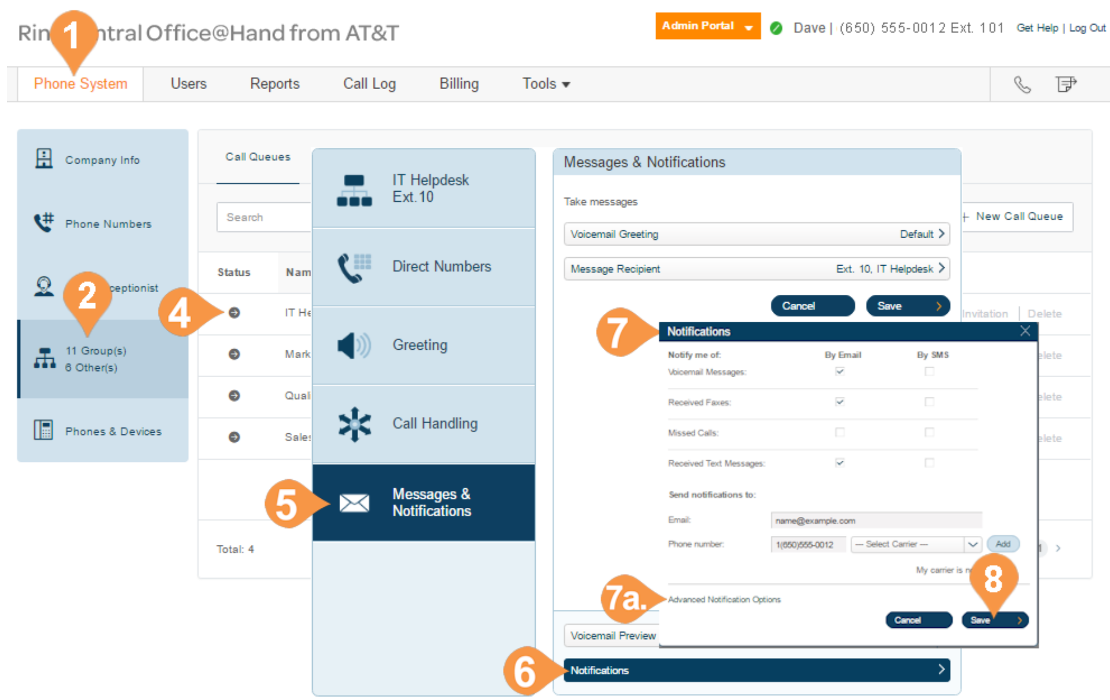


Notifications

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.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Queues** tab.
4. Select a **Call Queue** (Customer Support in this example).
5. Click **Messages and Notifications**.
6. Click **Notifications**.
7. A pop-up will appear with options for email or text-message notifications to a recipient of your choice when voicemail messages or faxes are received, or calls missed. Set your notification settings by checking the boxes and filling in email and phone numbers.
   a. Click **Advanced Notification** Options to see more detailed notification settings.
   b. Set your **Advanced Notification Options**. Here you can choose different email addresses and phone numbers for your notifications, select settings for marking messages as read, and select options for email attachments.
   c. Click **Save**.
   d. Click **Switch to Basic Notification Settings**.
8. Click **Save**.

Note: Note: If you have set custom Company hours, follow these steps for both the Company Hours and After hours tabs.



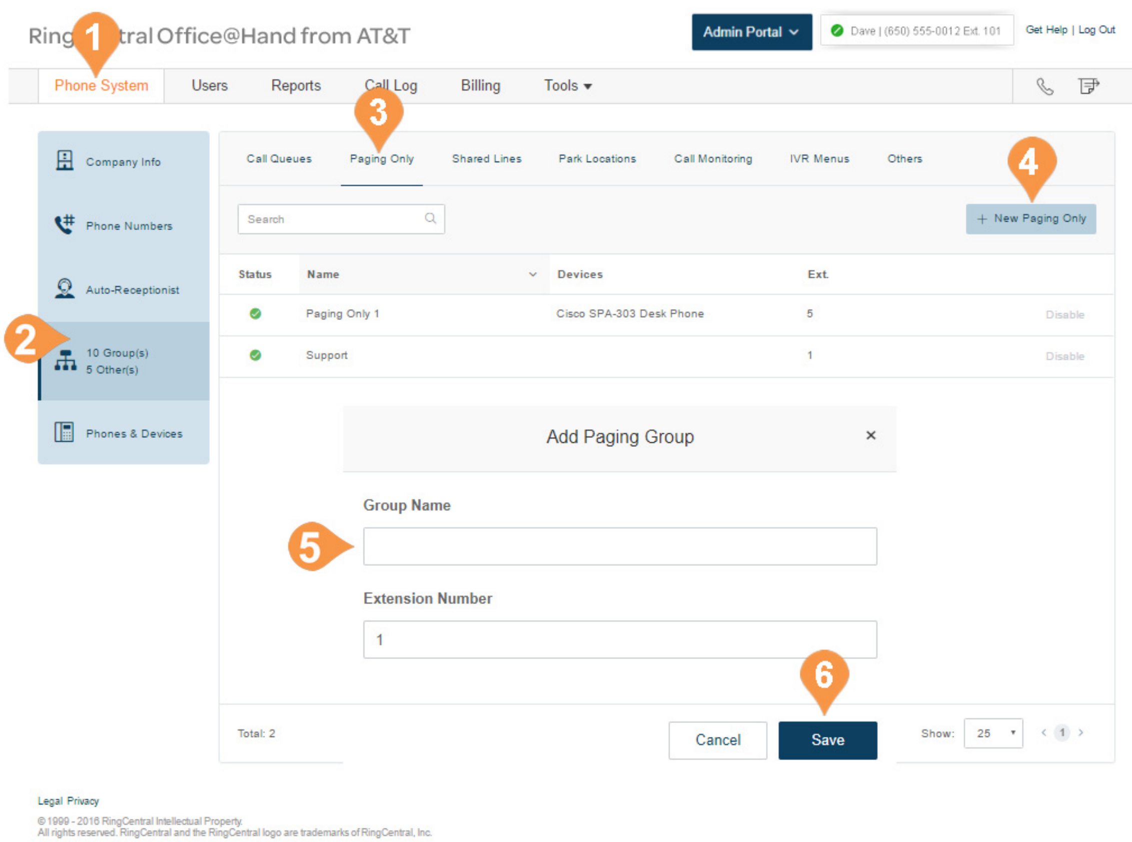
Paging Only

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.

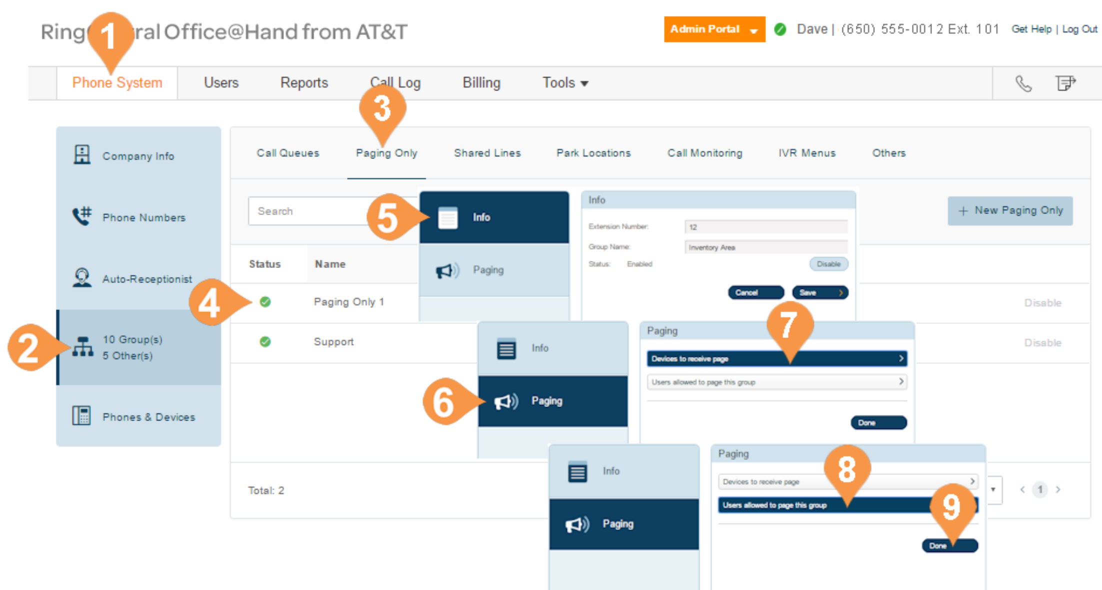
Add a Paging Only Group

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Paging Only** tab.
4. Click **New Paging Only**.
5. Enter the **Group Name** and **Extension Number**.
6. Click **Save**.



Configure a Paging Only Group

After the paging group is set up, select the devices to receive pages from the list of paging devices and user phones capable of doing so.



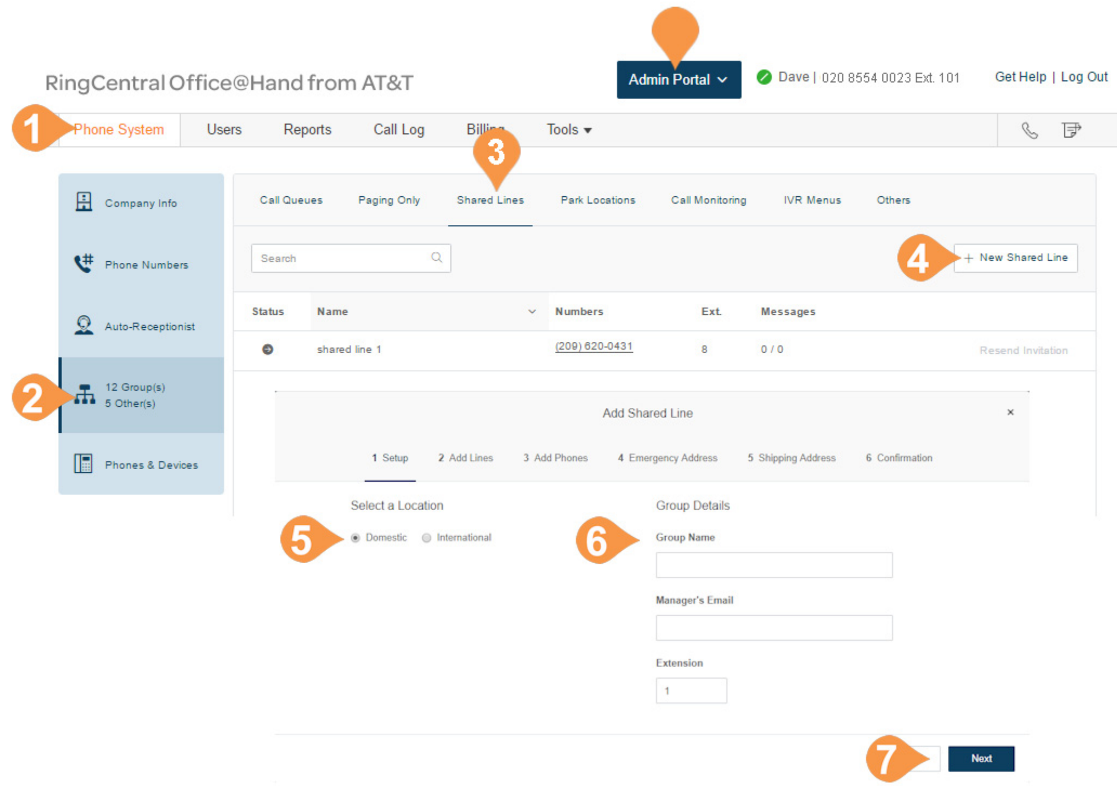
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Paging Only** tab.
4. Select a **Paging Only** group.
5. Click **Info**.
   a. Edit your group's name and extension, apply a template, or disable the extension and click **Save**.
6. Click **Paging**.
7. Click **Devices to receive page**.
   a. Select the **User Phones** or **Paging Devices** to receive pages.
   b. Use the arrows to move phones or devices from **Available Devices** to **Selected Devices**.
   c. Click **Save**.
8. Click **Users allowed to page this group**.
   a. Select the users who are to be allowed to page.
   b. Use the arrows to move users from **Available Users** to **Allowed Users**. This allows or revokes access to page.
   c. Click **Save**.
9. Click **Done**.

Shared Lines

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.

Add a Shared Lines Group

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Click **New Shared Line**.
5. Enter an **Extension** number, **Group Name**, and **Manager Email** for the Shared Lines group.
6. Click **Next**.
7. In **Add Shared Lines**, make one of the following selections:
   a. Select **New Phone Number**, enter the number of phone lines, and the **State**, and **Area Code**, and then click **Add**.
   b. Select **Existing Phone Number** and select numbers from your Office@Hand numbers.
8. Follow the prompts to complete the ordering of the phone numbers and devices.
9. Click **Save**.



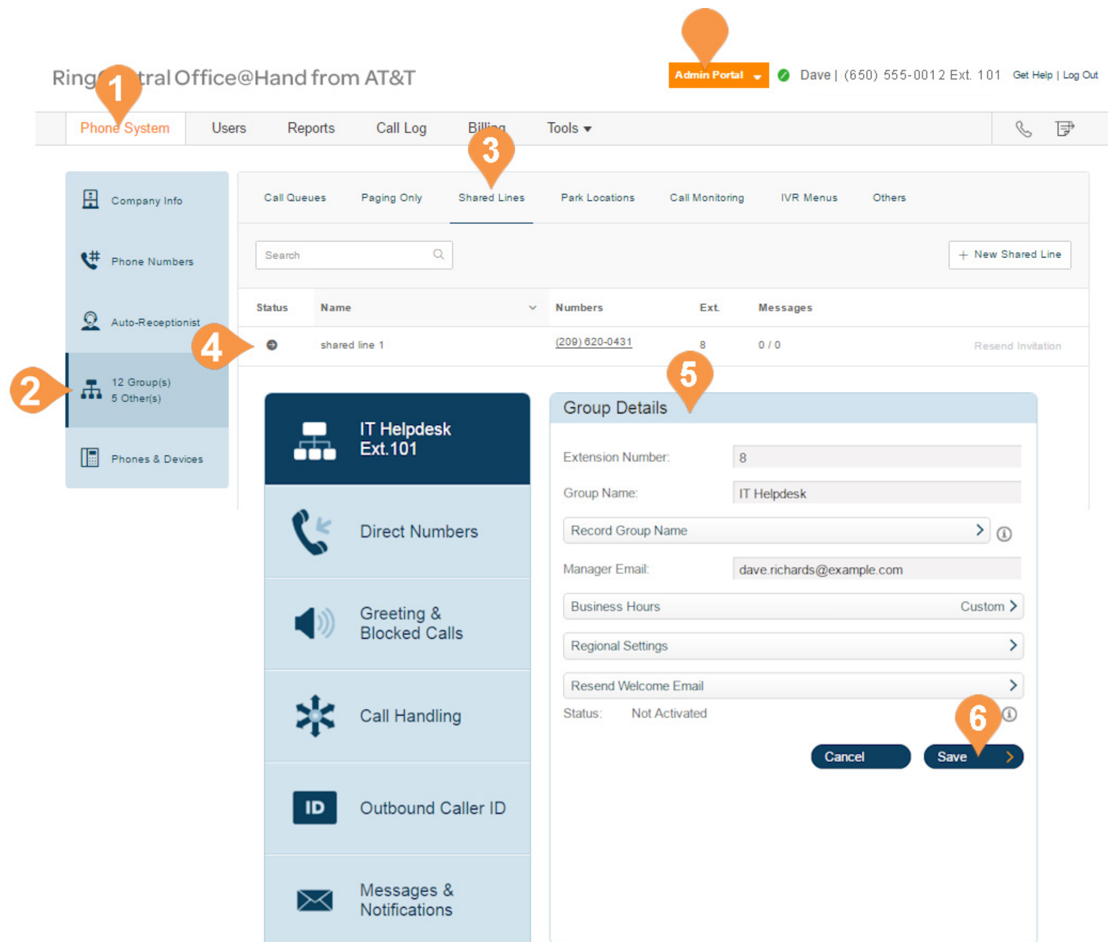
Configure a Shared Lines Group

Configure the Shared Lines group's name, password, business hours, and regional settings. You can also apply an existing template to the group.

Info

Edit your extension number, name, and delete your menu.

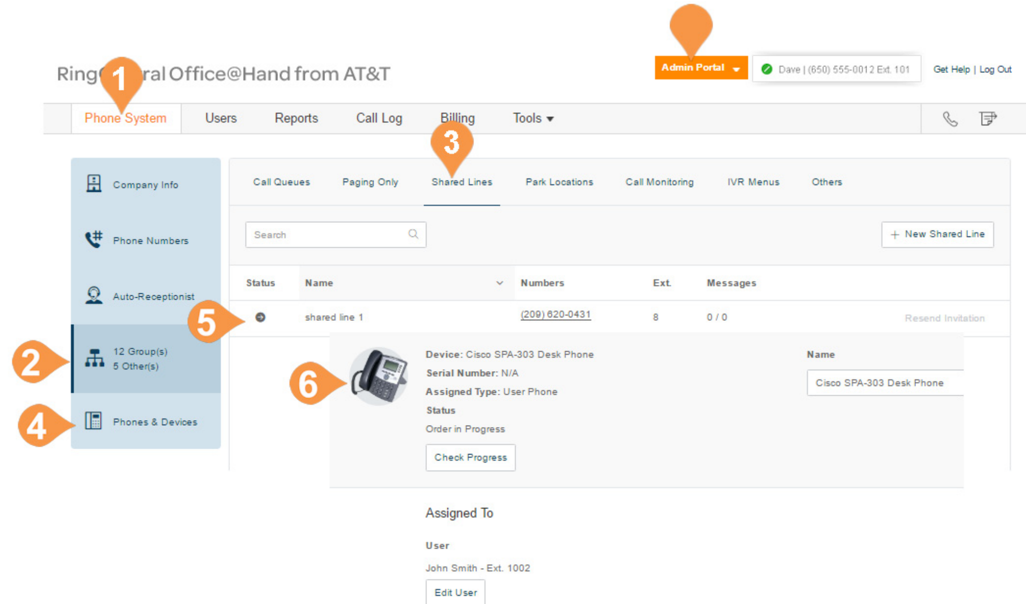
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Click a **Shared Line from the list. If you do not have a Shared List listed, see the previous page for instructions on how to create a shared line.**
5. Edit the following:
   a. **Extension Number**
   b. **Group Name**
   c. **Record Group Name**
   d. **Manager Email**
   e. **Business Hours**
   f. **Regional Settings**
   g. **Resend Welcome Email**
   h. **Status (read-only)**
6. Click **Save**.



Phones & Lines

To configure phones and lines for a shared lines group:

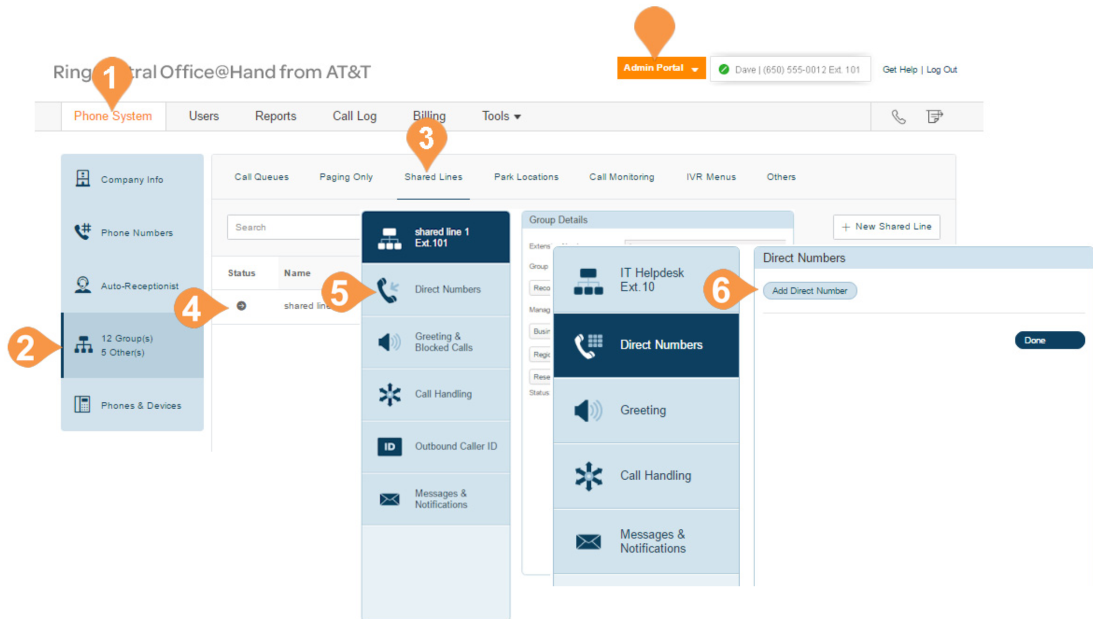
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Phones & Lines**.
6. Under **Phones**, click a phone to view its details.
   a. Click **Add Phones** to add more phones.
7. Under **Phone Lines**, click a phone number to view its details.
   a. Click **Add Lines** to add more lines.
   b. Click **Line Configuration** to configure the order of phone lines in your group.
8. Click **Emergency Address** to edit the address for your group.
9. Click **Done**.



Add a Direct Number

To add a direct number to a shared lines group:

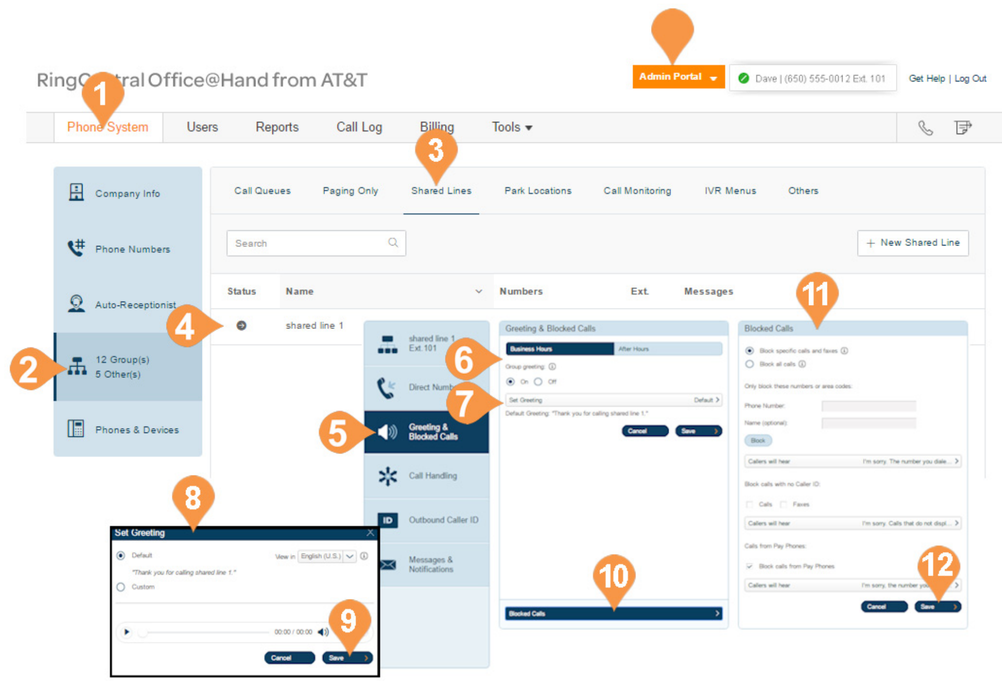
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Direct Numbers**.
6. Click **Add Direct Number**.
7. Follow the following instructions for the type of number you choose:
    a. **Local (Domestic) -** Provide the State/Province and Area Code and Select number.
    b. **Toll-Free -** Select the button for **Toll-Free** and select a Toll-Free pre-fix. Select one or more numbers and click **Add Numbers**.
    c. **Vanity -** Select the button for **Vanity**. Enter a number that helps customers remember your business phone number. Enter the numbers or letters you wish to use and click **Search** to see if it is available. Select a number and click **Add Numbers**.
8. Click **Next**.
9. Review and confirm the order.
10. Click **Done**.



Greeting & Blocked Numbers

Set Greeting and keep the default, or record a custom greeting for the group. Click Blocked Numbers to block specific calls or all calls for this call group. Then set up the message blocked callers will hear.

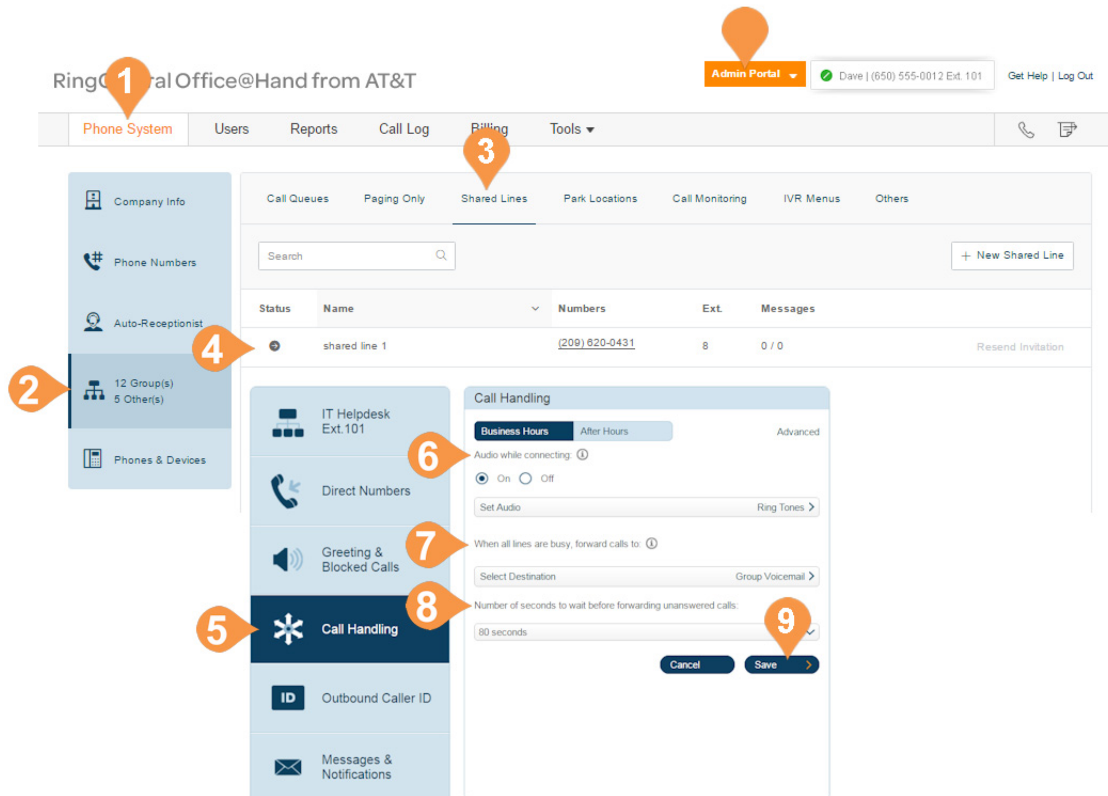
1. From **Admin Portal**, select **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Greeting & Blocked Calls**.
6. Under Group greeting, be sure the button next to **On** is selected if you'd like a greeting.
7. Click **Set Greeting** to set your greeting.
8. A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, 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 Office@Hand will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand asks to record through your computer. The Microphone Test and Record settings appear. When ready, click the red **Record** button to record your company 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 **Attach**.
9. Click **Save**.
10. Click **Blocked Calls**.
11. Set your preferences for **Blocked Calls**.
12. Click **Save**.



Call Handling

Review or change each option for handling incoming calls for both Business Hours and After Hours. Click the drop-down menu and set the number of rings to wait before forwarding unanswered calls to any value between 10 and 80 seconds.

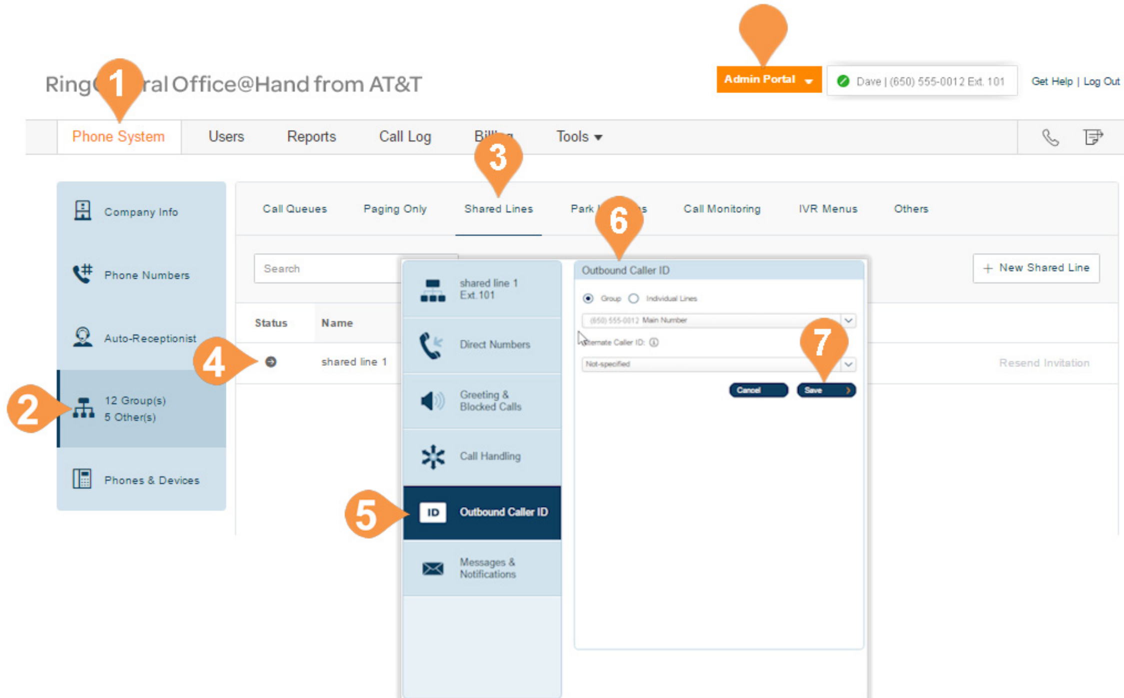
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Call Handling**.
6. Under **Audio while connecting**, select the button next to **On** and click **Set Audio**.
   a. Choose a **Ring Tone**, **Music**, **None** or **Custom** for your audio.
   b. Click Save.
7. Under **When all lines are busy forward calls to**, click **Select Destination**.
   a. Select the button next tot he call destination you'd like to set.
   a. Click **Save**.
8. Under **Number of seconds to wait before forwarding unanswered calls** use the drop-down menu to choose a value between 10 and 80 seconds.
9. Click **Save**.



Outbound Caller ID

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

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Outbound Caller ID**.
6. Choose whether you'd like to use the one number as the caller ID for the entire group or if you'd like to use individual lines.
   a. **Group** - Select the button next to **Group** and choose a number from the drop-down menu.
   b. **Individual Lines** - Select the button next to **Individual Lines**.
7. Click **Save.**

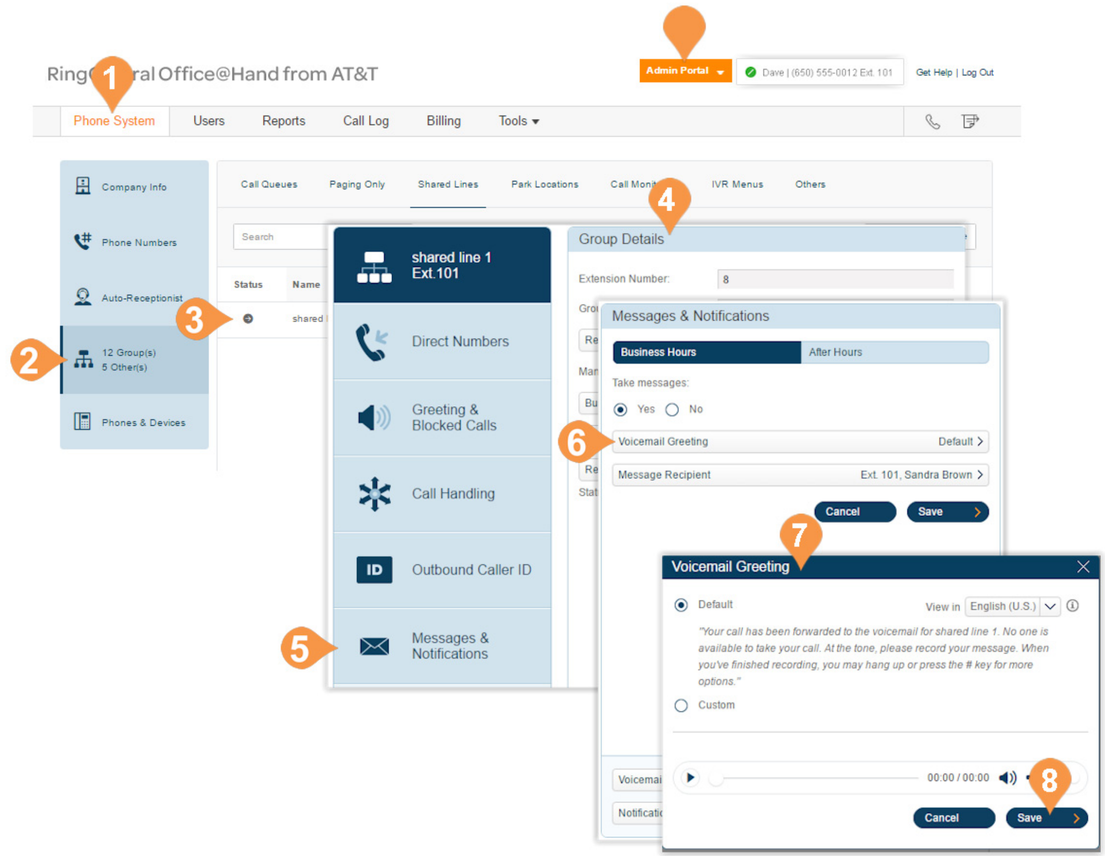


Messages & Notifications

Set up a group voicemail and notification options.

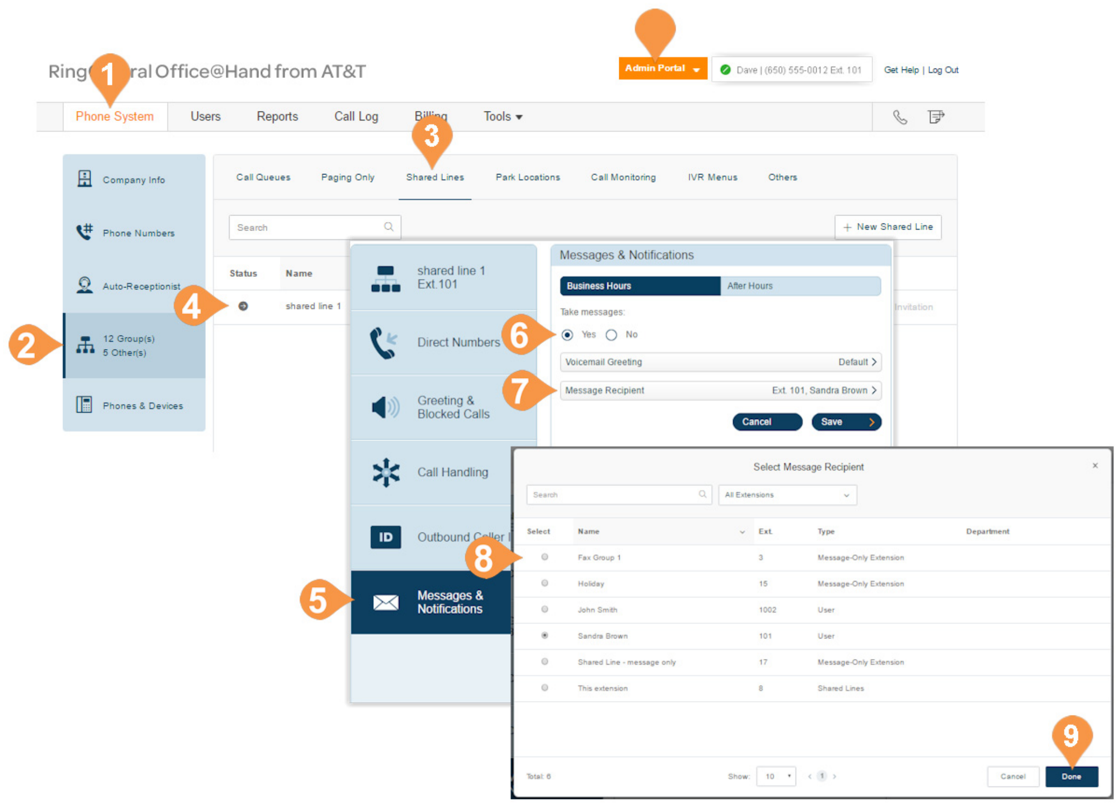
Voicemail Greeting

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications.**
6. Click **Voicemail Greeting.**
7. A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at,** 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 Office@Hand will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand 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 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 **Attach**.
8. Click **Save**.



Message Recipient

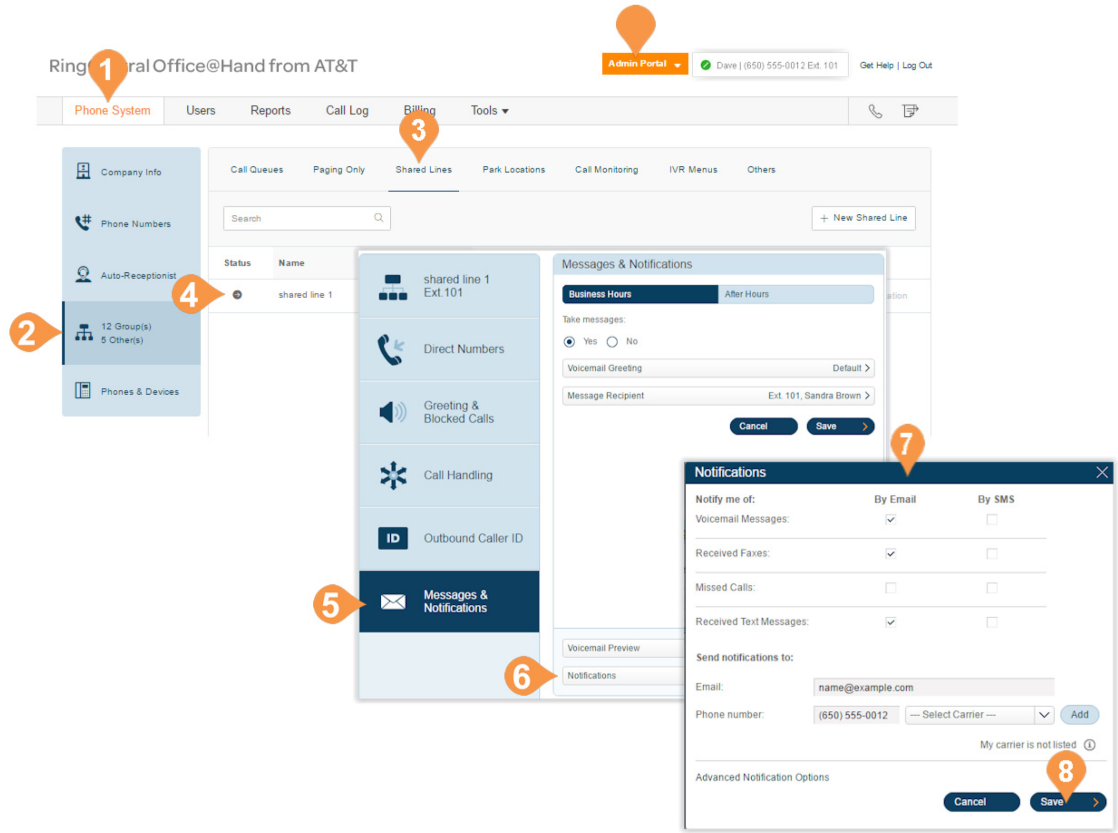
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines group**.
5. Click **Messages & Notifications.**
6. Under **Take messages**, select the button next to **On**.
7. Click **Message Recipient**. A pop-up will appear with a list of recipients.
8. Select the button next to the extension you'd like to set as the recipient.
9. Click **Save**.



Notifications

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

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Shared Lines** tab.
4. Select an existing **Shared Lines** group.
5. Click **Messages & Notifications**.
6. Click **Notifications**. A pop-up will appear with notification options.
7. Set your notification settings by checking the boxes and filling in email and phone numbers.
   a. Click **Advanced Notification Options** to see more detailed notification settings.
   b. Set your **Advanced Notification Options**. Here you can choose different email addresses and phone numbers for your notifications, select settings for marking messages as read, and select options for email attachments.
   c. Click **Switch to Basic Notification Settings**.
8. Click **Save**.



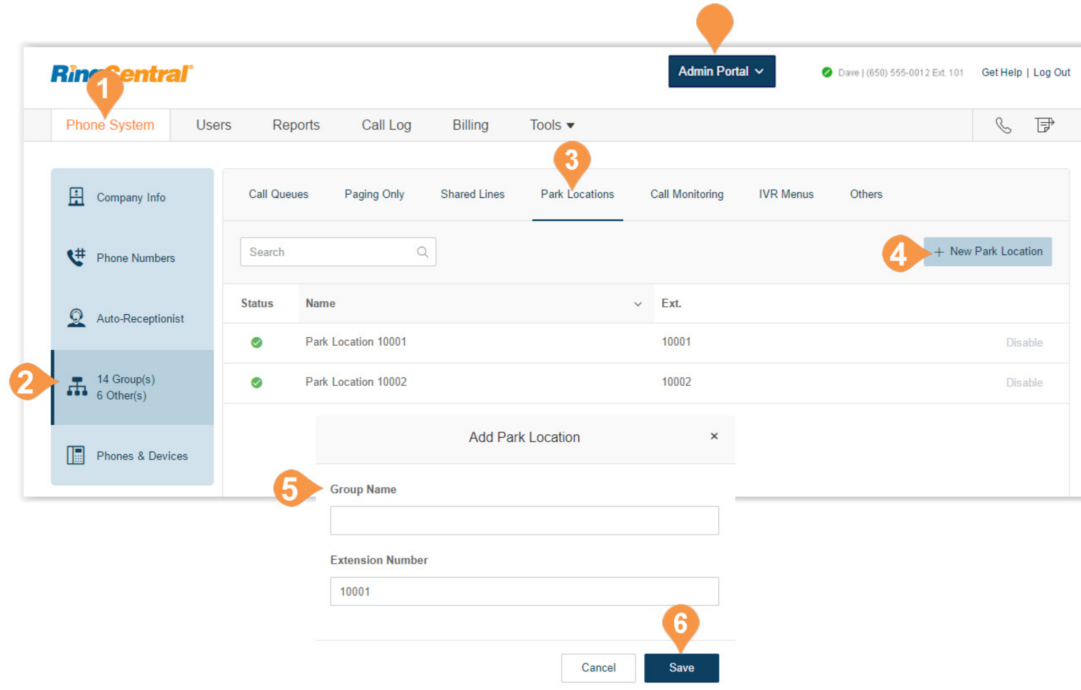
Park Location

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 on the RingCentral for Desktop application. You can have up to 100 park locations in your phone system

Add a Park Location

1. From the **Admin Portal** tab, select **Phone System**.
2. Click **Groups**.
3. Click the **Park Locations** tab.
4. Click **New Park Location**.
   The **Add Park Location** pop-up appears.
5. Enter the **Group Name** and **Extension Number**.
6. Click **Save**.

Note: Only one call can be parked in each location at a time. 7.

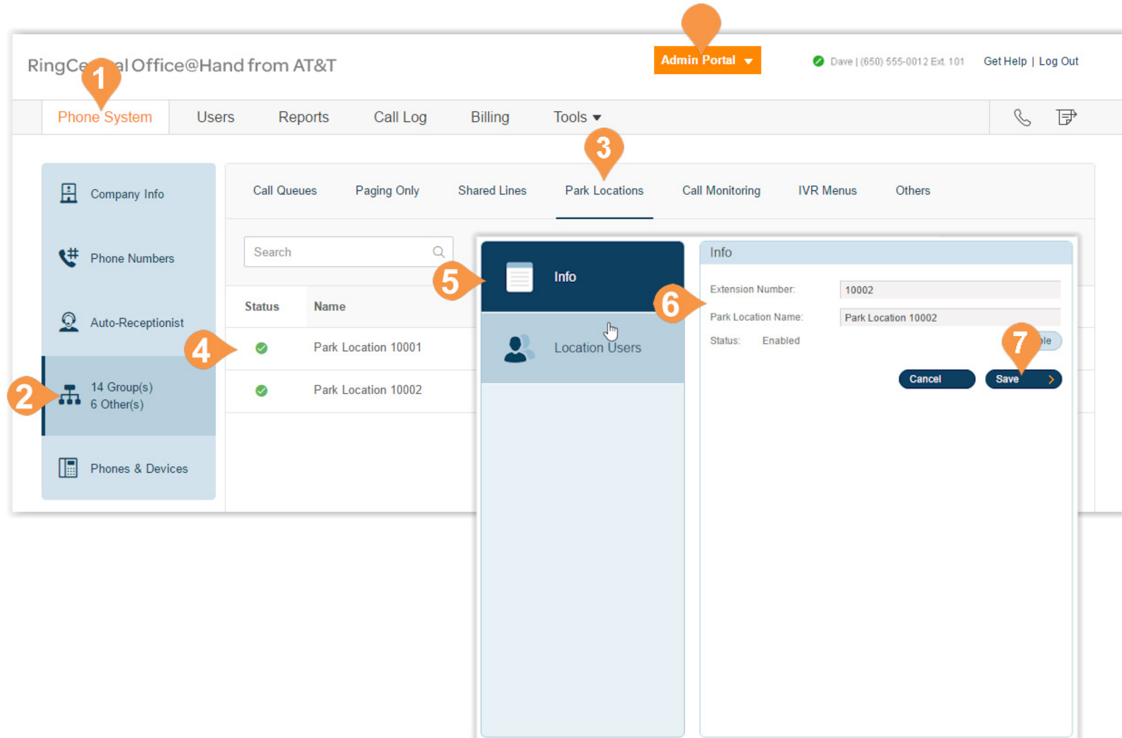


Configure a Park Location

After you create a Park Location, you can edit its information and add or remove users to it.

Info

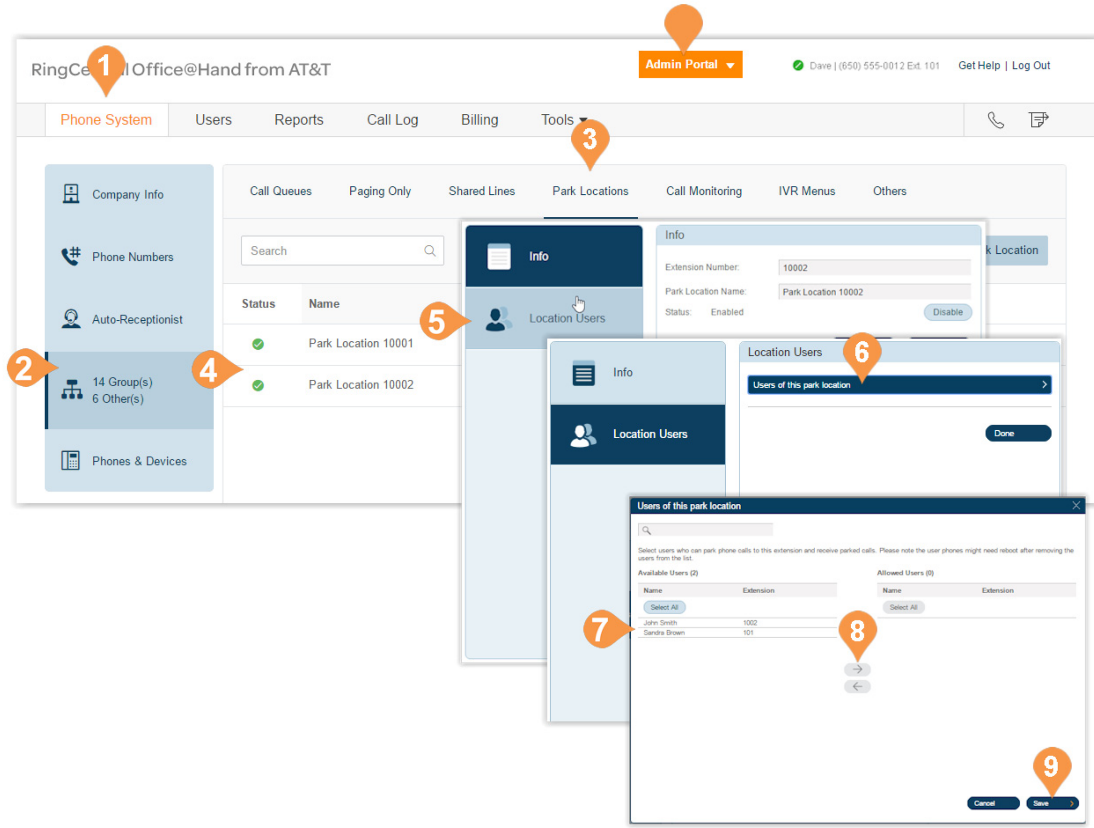
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Gaddroups**.
3. Click the **Park Location** tab.
4. Select a **Park Location** (Park Location 1001 in this example).
5. Click **Info**.
6. Edit your **Extension Number** and **Park Location Name**.
7. If you'd like to delete this extension, click **Delete Park Location**.



Add Users to a Park Location

To add users to a park location:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Park Location** tab.
4. Select a **Park Location** (Park Location 1001 in this example).
5. Click **Location Users**.
6. Click **Users of this park location**.
7. Select the users you'd like to add to the location.
8. Click the blue arrow to move the users to the list on the right.
9. Click **Save**.



Call Monitoring Group*

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 authorized users 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 the 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.

Supported Devices:

- Polycom VVX 310
- Polycom VVX 410
- Polycom VVX 500
- Cisco SPA 303
- Cisco SPA 508G
- Cisco SPA 514G
- Cisco SPA 525G2

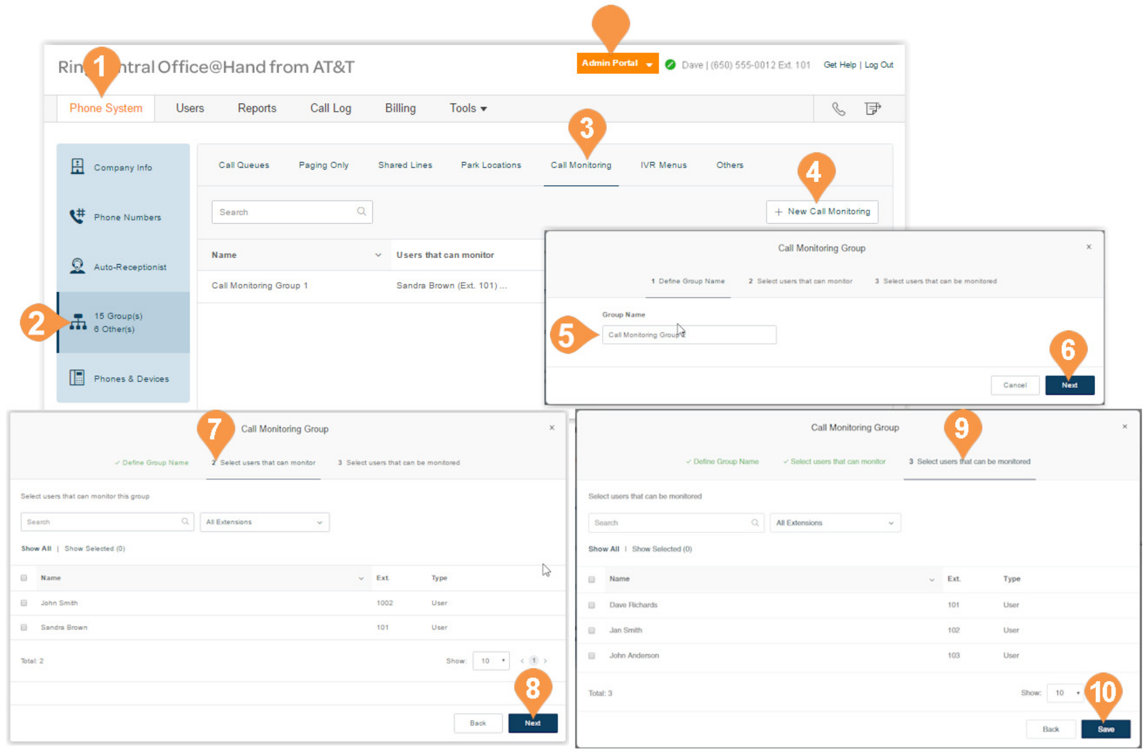
Action	Description	Example	Touch Tone
Monitor	Silently listen in on a call	Supervisors/QA to monitor performance	*80
Whisper	Speak only to the employee without the caller on the other end hearing	Provide support to users to help them handle a call	*81
Barge	Join the call so all parties can communicate with each other	Help facilitate discussion between all parties	*82
Take Over	Take over the call entirely and release the employee from the call	Allow the supervisor to handle a call and allow the employee to continue other tasks	*83

Add a Call Monitoring Group*

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Monitoring** tab.
4. Click **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 doing the monitoring (for example, supervisors) can add the users who will be getting monitored (for example, agents) in his or her desk phone Presence appearance. The desk phone may need to be rebooted after these settings have been changed.

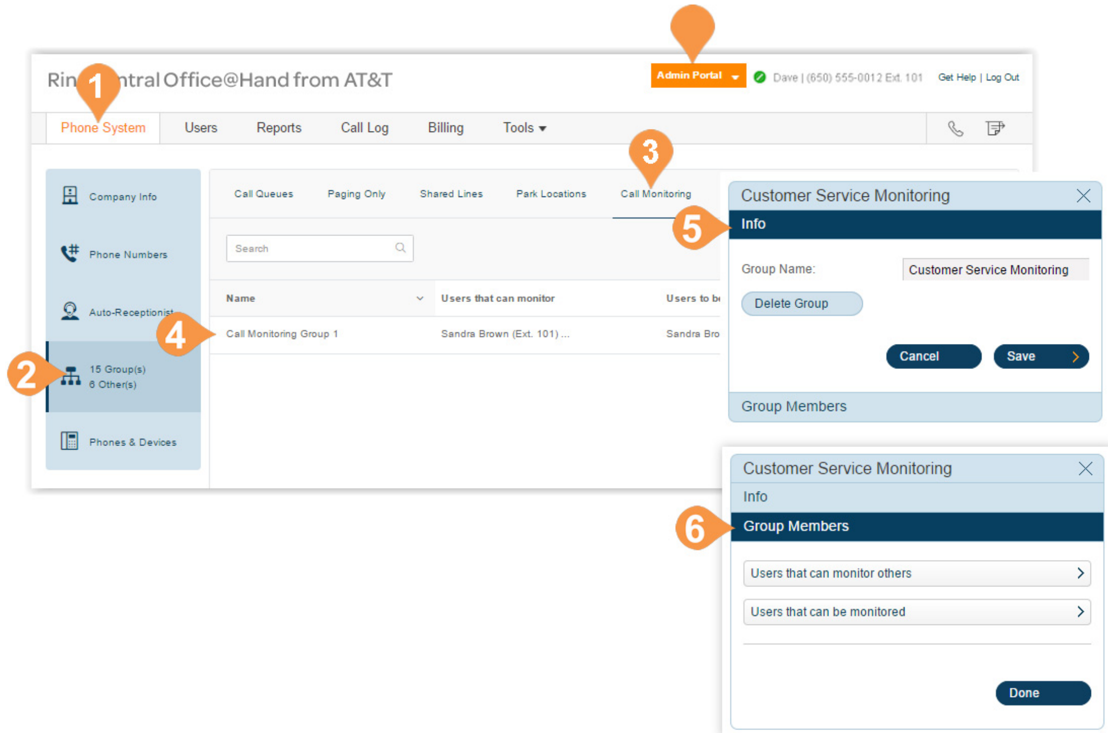
*Available for Office Premium Enterprise users only.



Configure a Call Monitoring Group

After you create your Call Monitoring Group, you can edit the group members and set up Presence for members of the group.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Call Monitoring** tab.
4. Select a **Call Monitoring group**.
5. Click **Info** to edit the **Group Name** or **Delete** the group.
6. Click **Group Members** to edit Users that can monitor others and Users that can be monitored.

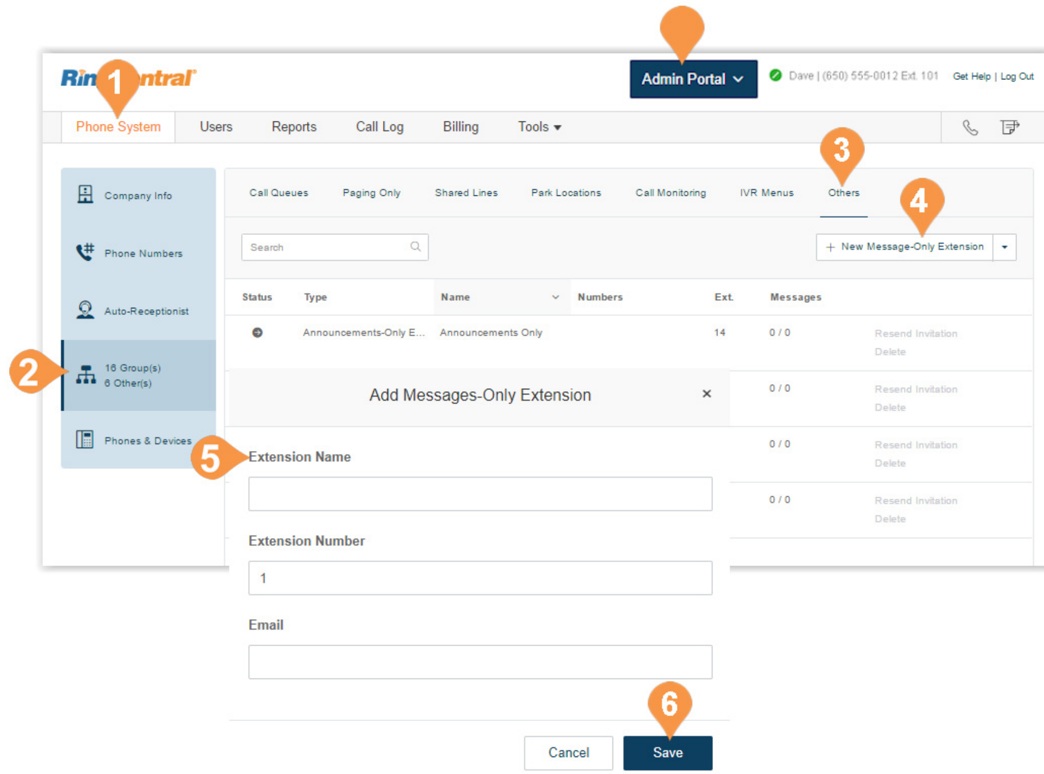


Message-Only Extensions

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

Add a Message-Only Extension

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Click **New Message-Only Extension**.
   The **Add Messages-Only Extension** pop-up appears.
5. Enter the **Extension Name**, **Extension Number**, and **Email.**
6. Click **Save.**



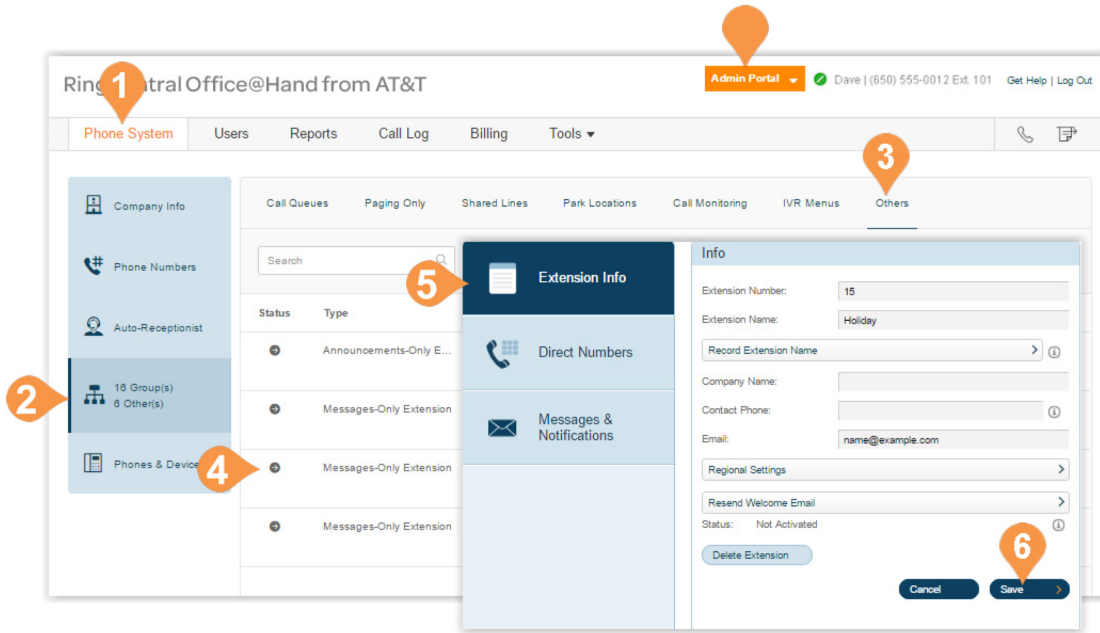
Configure a Message-Only Extension

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

Extension Info

Edit your extension number, name, and delete your menu.

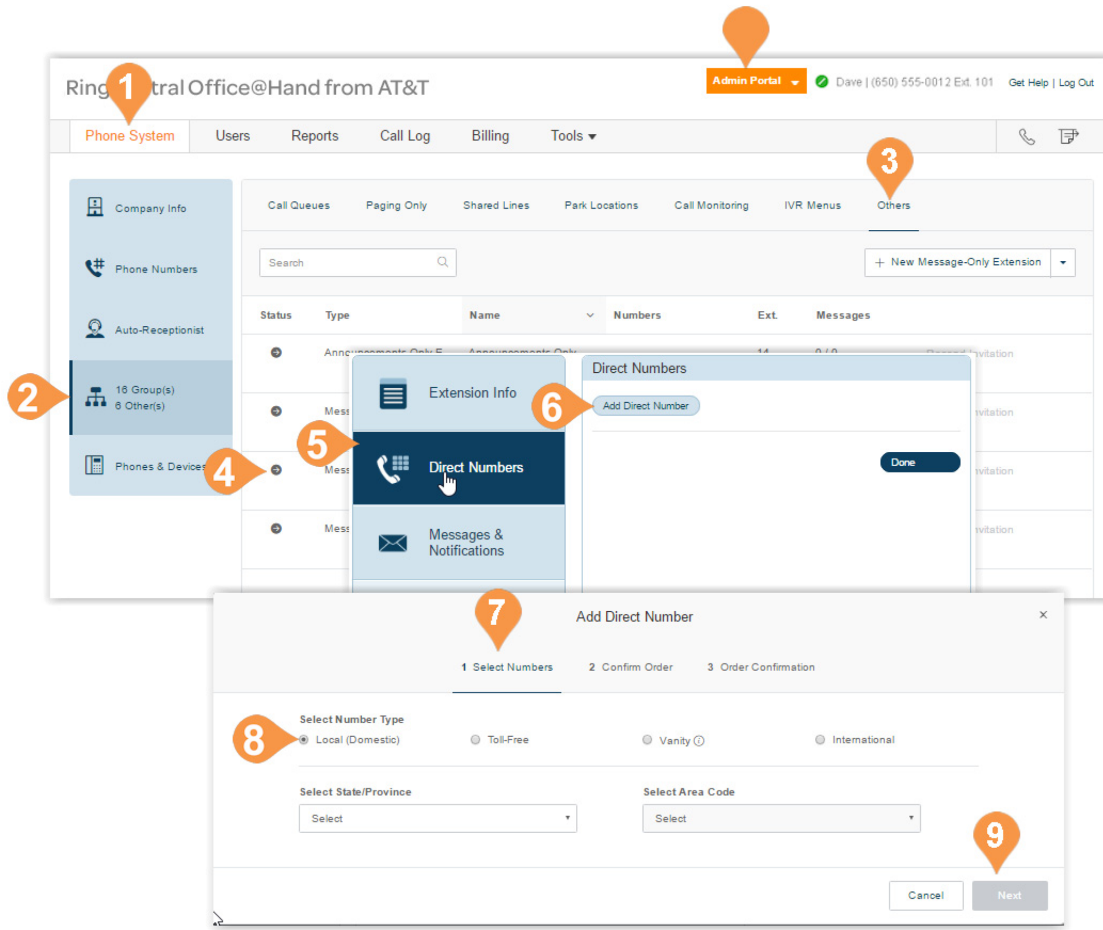
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Message-Only Extension** (Voicemail in this example).
5. Click **Extension Info** to edit the following:
   a. **Extension Number**
   b. **Extension Name**
   c. **Company Name**
   d. **Contact Phone**
   e. **Email**
   f. **Regional Settings**
   g. **Apply Template**
   h. **Resend Welcome Email**
   i. **Delete Extension**
6. Click **Save**.



Add a Direct Number

To add a direct number to a message-only extension:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Message-Only Extension**.
5. Select the **Direct Numbers** tab.
6. Click **Add Direct Number**.
7. Select the **State/Province** and **Area code** then select a number from the drop-down menu.
8. Click **Next** when finished choosing your number.
9. Follow the prompts to purchase your new number.

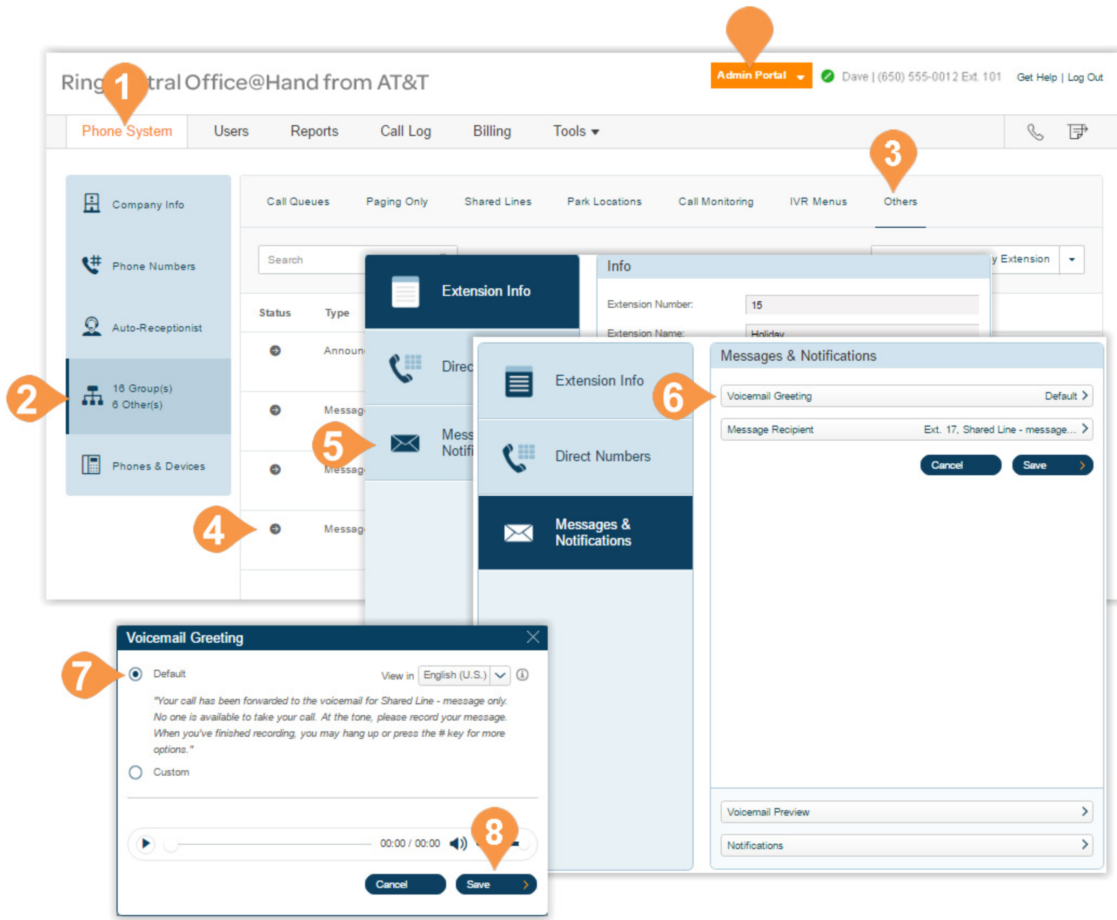


Messages & Notifications

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

Set a Voicemail Greeting

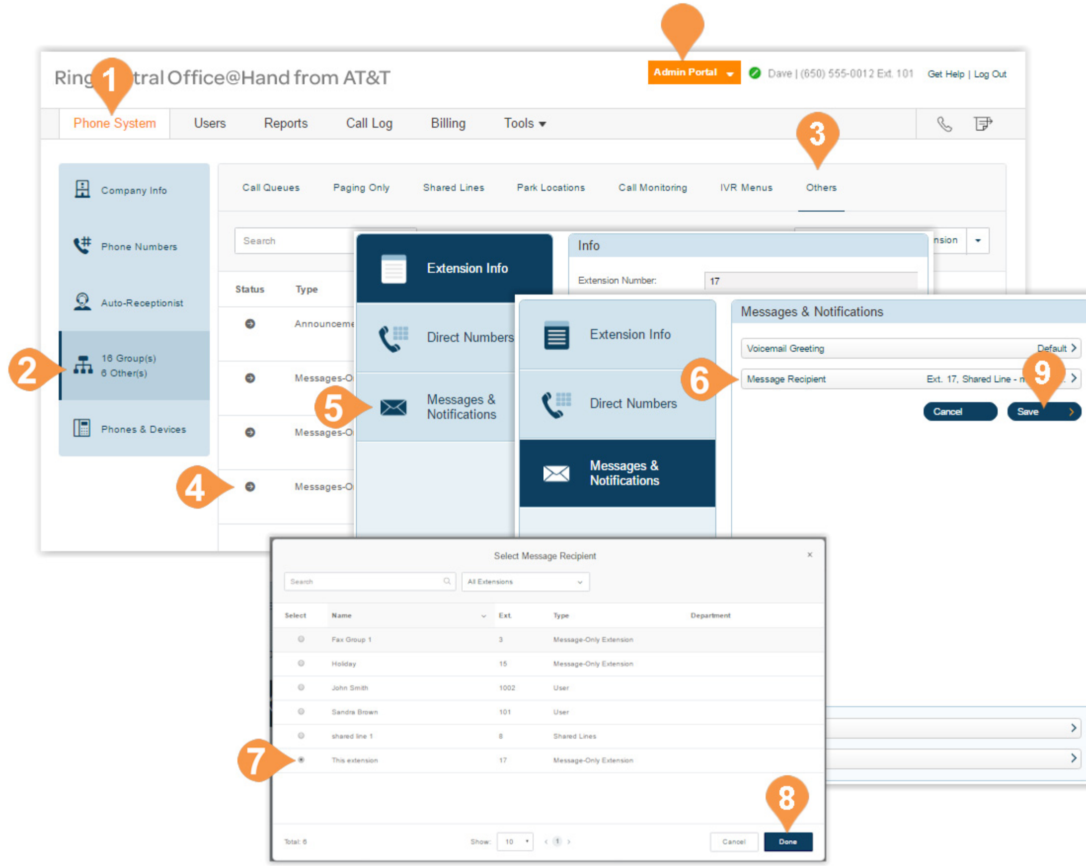
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Message-Only Extension**.
5. Click **Messages & Notifications**.
6. Click **Voicemail Greeting**.
7. A pop-up will appear displaying the current **Voicemail Greeting**. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, 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 Office@Hand will call you to record your message.
      - **Record Using Computer Microphone**
        Click **Allow** if Office@Hand 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 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 **Attach**.
8. Click **Save**.



Message Recipient

To set a message recipient:

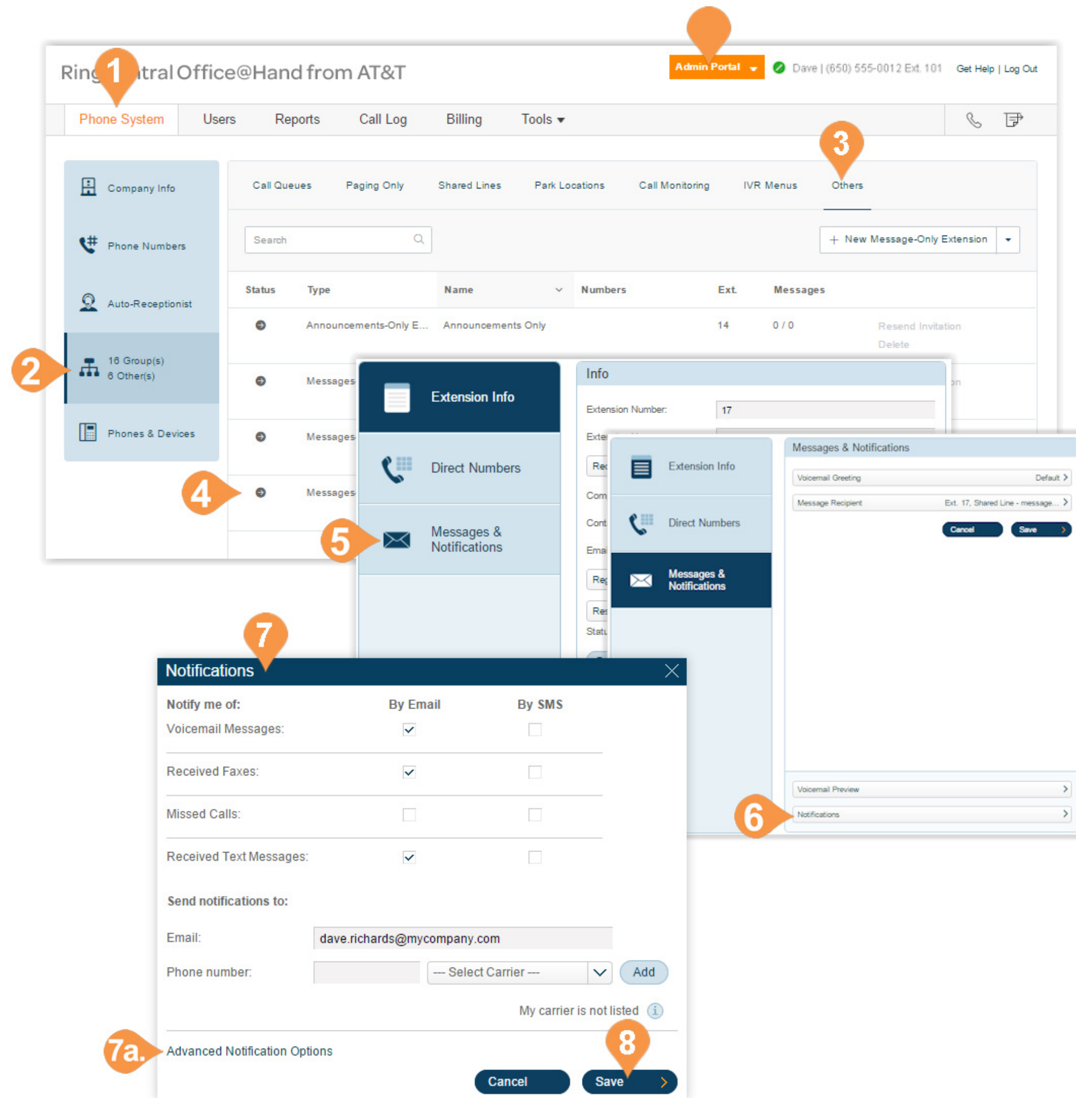
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Message-Only Extension** (Voicemail in this example).
5. Click **Messages & Notifications**.
6. Click **Message Recipient**.
7. A pop-up will appear with a list of recipients.
8. Select the button next to the extension you'd like to set as the recipient.
9. Click **Save**.



Notifications

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

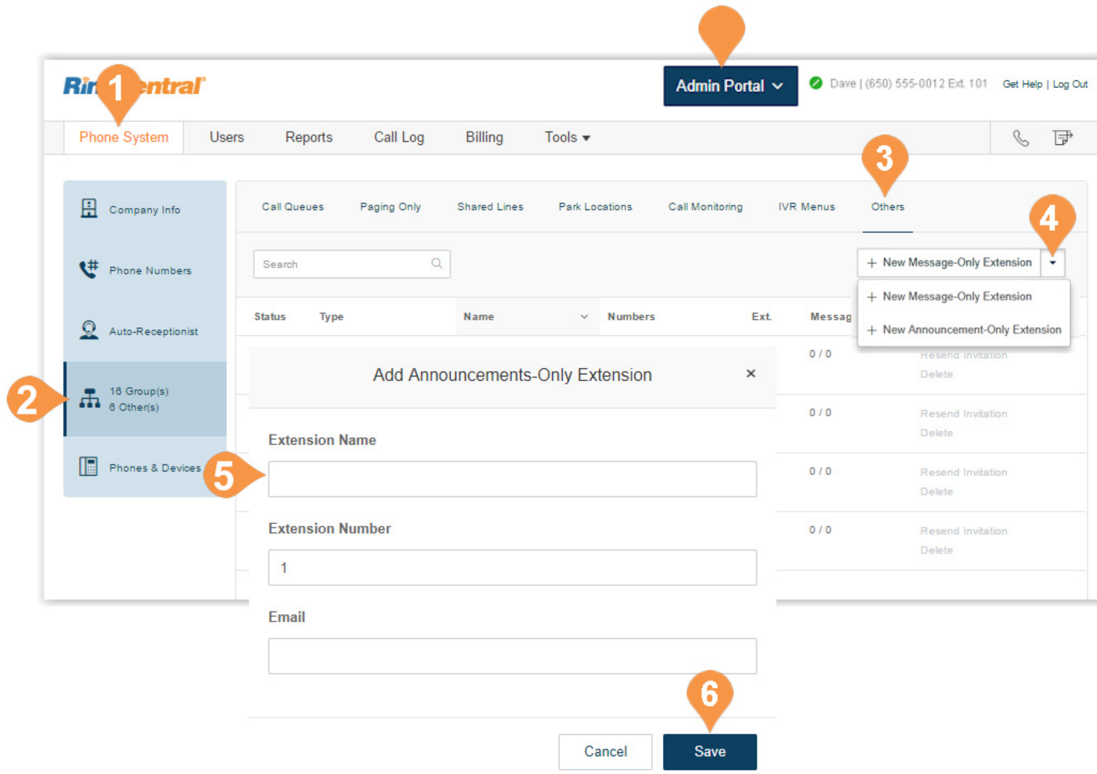
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Message-Only Extension** (Voicemail in this example).
5. Click **Messages & Notifications**.
6. Click **Notifications**.
   A pop-up will appear with notification options.
7. Set your notification settings by checking the boxes and filling in email and phone numbers.
   a. Click **Advanced Notification Options** to see more detailed notification settings.
   b. Set your **Advanced Notification Options**. Here you can choose different email addresses and phone numbers for your notifications, select settings for marking messages as read, and select options for email attachments.
   c. Click **Switch to Basic Notification Settings**.
8. Click **Save**.



Announcement-Only Extensions

Create an extension that only plays an announcement for your callers. All callers routed to this extension hear a recorded announcement such as a holiday closure announcement. Add an Announcements-Only Extension.

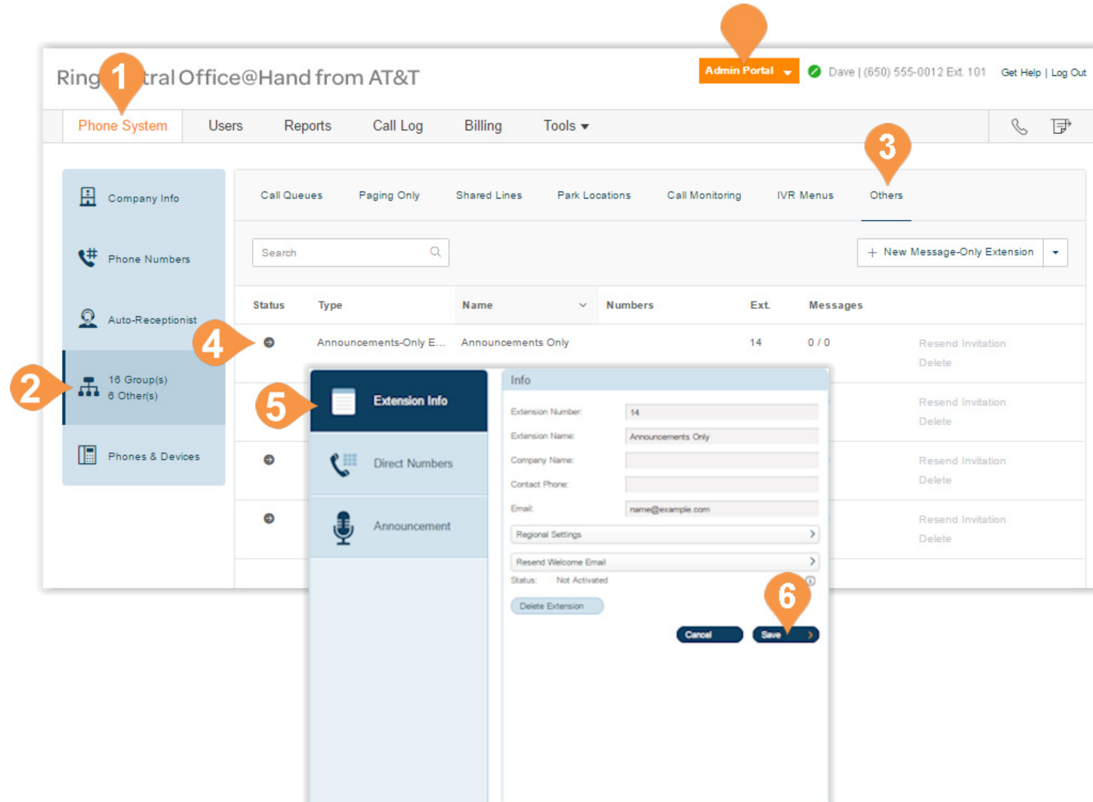
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Others** tab.
4. Select **New Announcements-Only Extension** from the menu.
   The **Add Announcements-Only Extension** pop-up appears.
5. Enter the **Extension Name**, **Extension Number**, and **Email**.
6. Click **Save.**



Extension Info

Edit your extension number, name, and delete your menu.

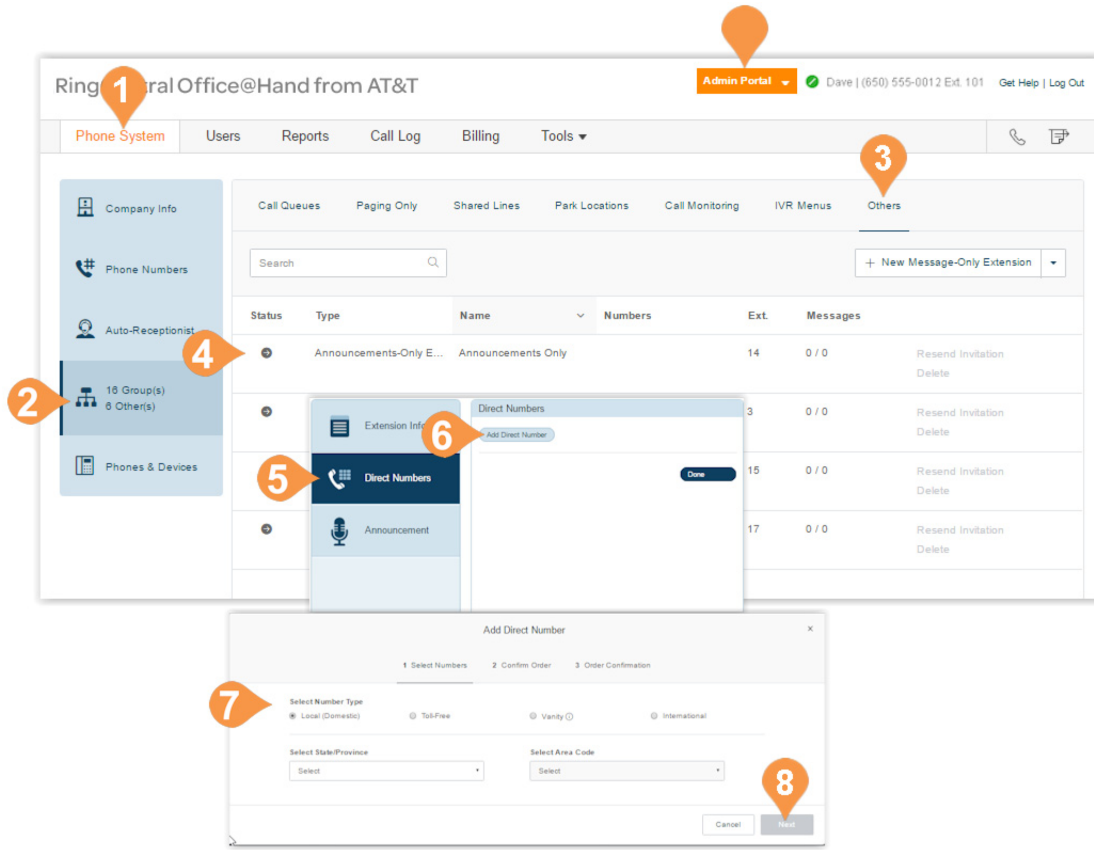
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Announcements-Only Extension** (Office Address and Hours in this example).
5. Click **Extension Info** to edit the following:
   a. **Extension Number**
   b. **Extension Name**
   c. **Company Name**
   d. **Contact Phone**
   e. **Email**
   f. **Regional Settings**
   g. **Apply Template**
   h. **Resend Welcome Email**
   i. Delete Extension
6. Click **Save**.



Add a Direct Number

To add a direct number for your Announcement-Only Extension:

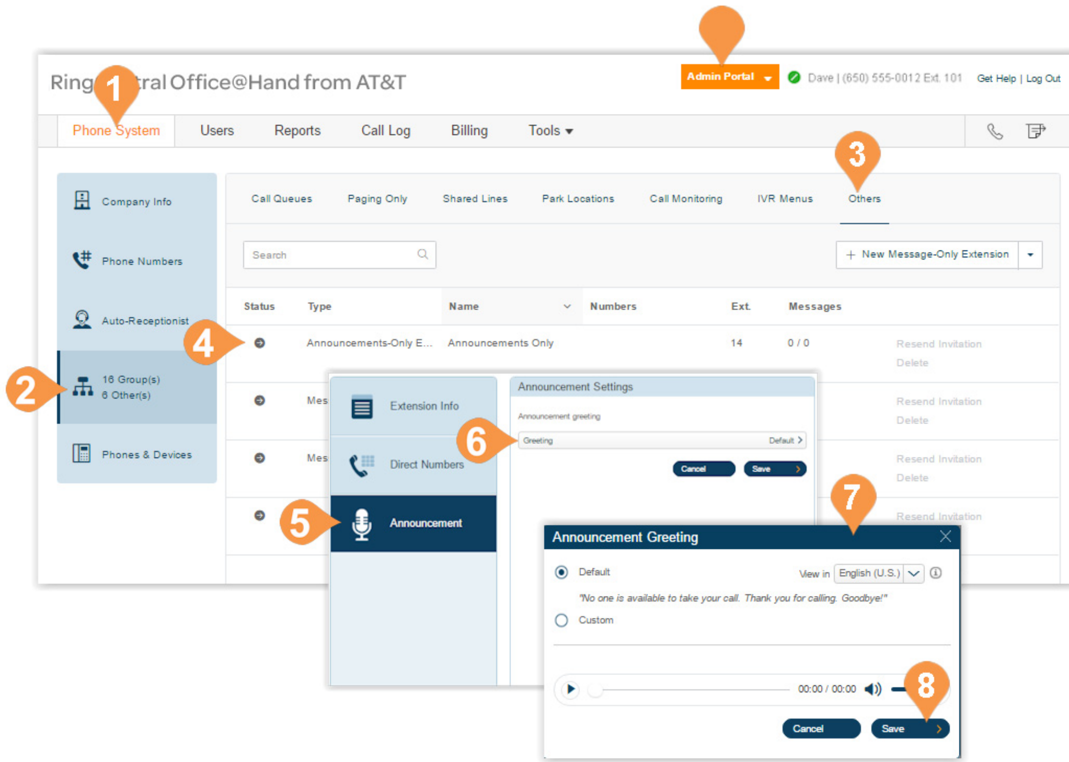
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Announcement-Only Extension** (Office Address and Hours in this example).
5. Click **Direct Number**.
6. Click **Add Direct Number**.
7. Select the **State/Province** and **Area code** then select a number from the drop-down menu.
8. Click **Next** when finished choosing your number.
9. Follow the prompts to purchase your new number.



Set an Announcement

To set an announcement:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Groups**.
3. Click the **Other** tab.
4. Select an existing **Announcement-Only Extension** (Office Address and Hours in this example).
5. Click **Announcement**.
6. Click **Greeting**.
7. A pop-up will appear displaying the current Announcement Greeting. Choose your preferred type of greeting.
   a. **Default** – Select the button next to **Default**.
   b. **Custom** – Select the button next to **Custom** and select how you'd like to set your custom recording:
      - **Record Over the Phone**
        Next to **Call me at**, 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 Using Computer Microphone**
        Click **Allow** if Office@Hand asks to record through your computer. The Microphone Test and Record settings will appear. When ready, click the red **Record** button to record your announcement 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 **Attach**.
8. Click **Save**.



Phones & Devices

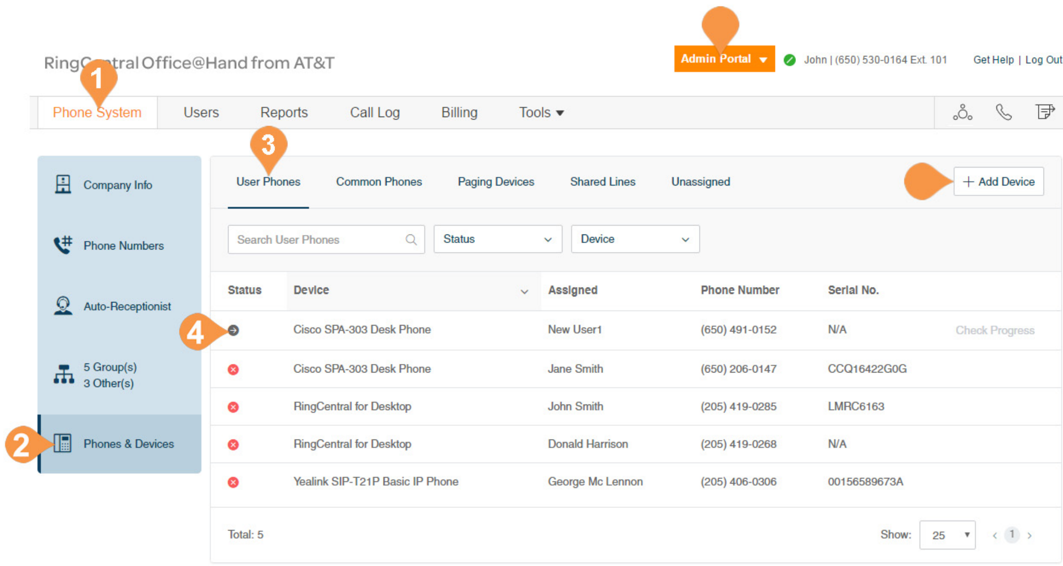
Phones & Devices

This section provides you a view of all phones that are associated with your Office@Hand account. You can add phones and devices from this section as well.

User Phones, Devices, Unassigned

To view and edit devices on your account:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click on the tabs at the top of the middle panel to see:
   a. **User Phones**
   b. **Common Phones**
   c. Paging Devices
   d. Shared Lines
   e. **Unassigned**
4. Click on a device to view and edit details.



Search 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.

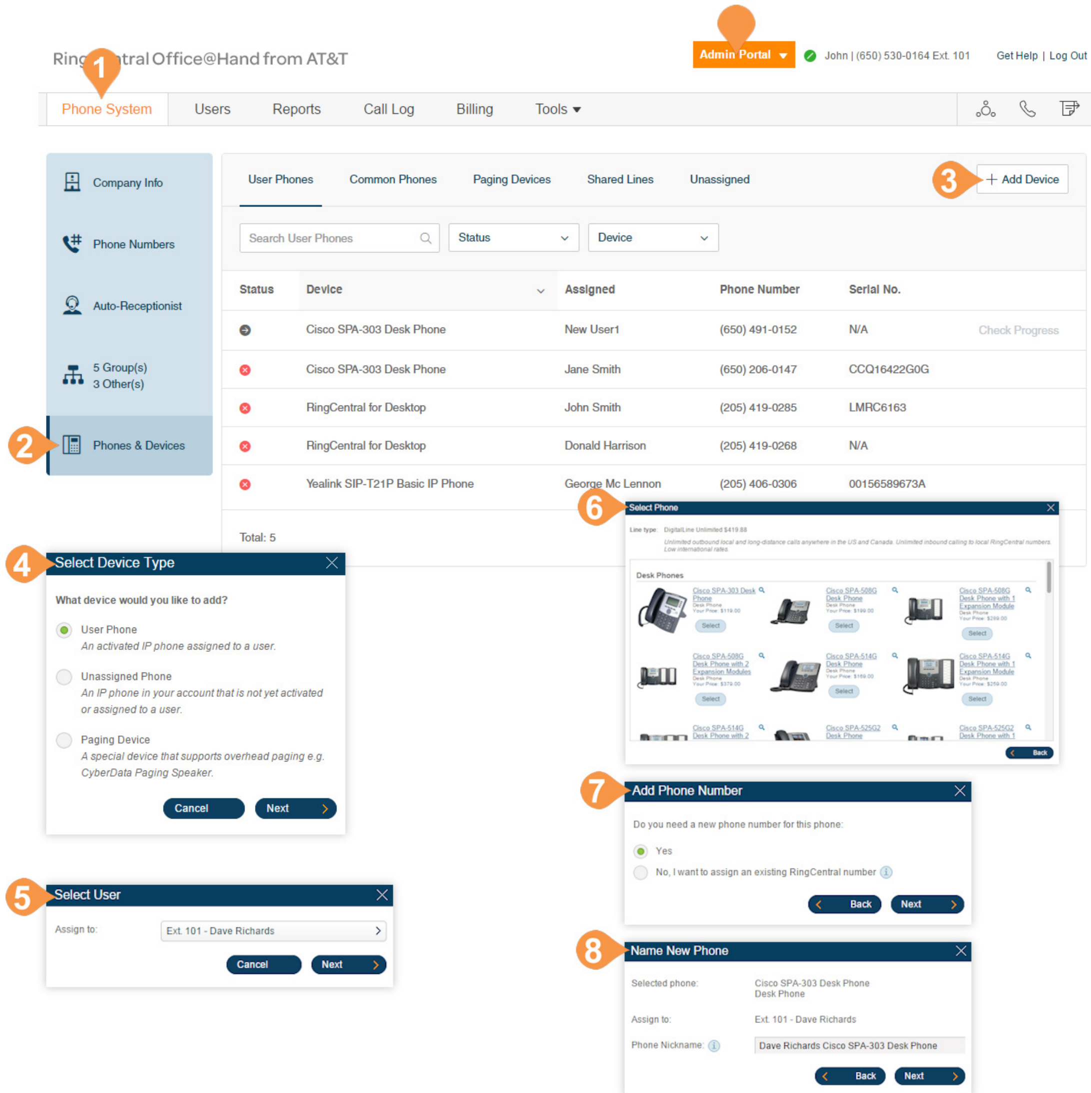
Add a Device

You can add a phone or device by clicking **Add Device** in the upper right. See the next pages for more detailed instructions.

Add a User Phone

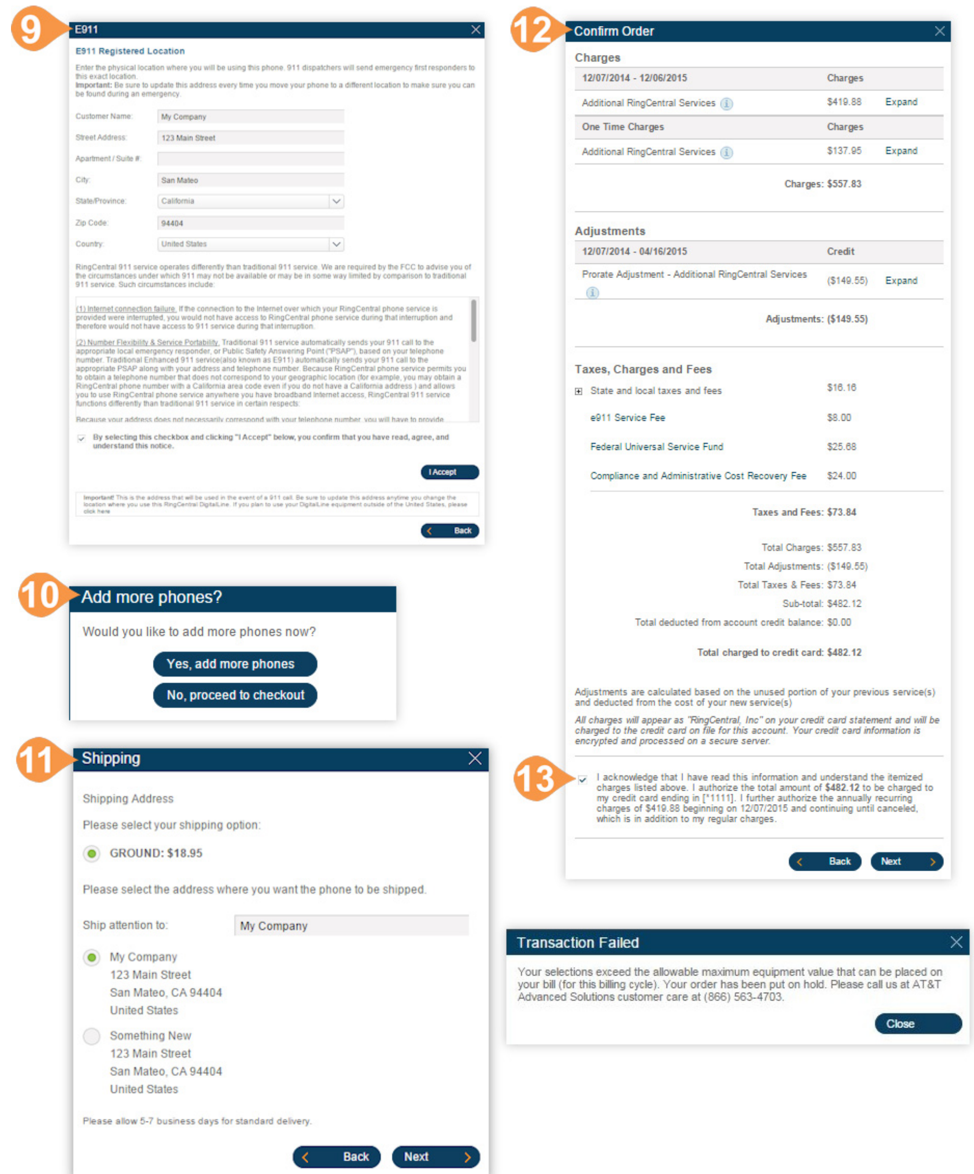
To add a user phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click **Add Device**.
4. Select the button next to **User Phone** and click **Next**.
5. Select a user to assign the phone to.
6. Select a phone to rent or buy.
7. Choose to add a new phone number for this phone or assign it to an existing Office@Hand number. If you choose to add a new phone number, choose a number from the drop-down menu.
8. Name your new phone.



9. Register your **E911 Location**.
10. Choose to add more phones or proceed to checkout.
11. Select your **Shipping Address** and click **Next**.
12. Confirm your order by checking the acknowledgment box.
13. Click **Next**.

Note: If you have exceeded your device spending limit for your current billing cycle, your transaction will fail and you will see a message warning you that your order has been put on hold. The warning message states: "Your selections exceed the allowable maximum equipment value that can be placed on your bill (for this billing cycle). Your order has been put on hold. Please call us at AT&T Advanced Solutions customer care at (866) 563-4703." You can call the number on the warning message to resolve the issue.

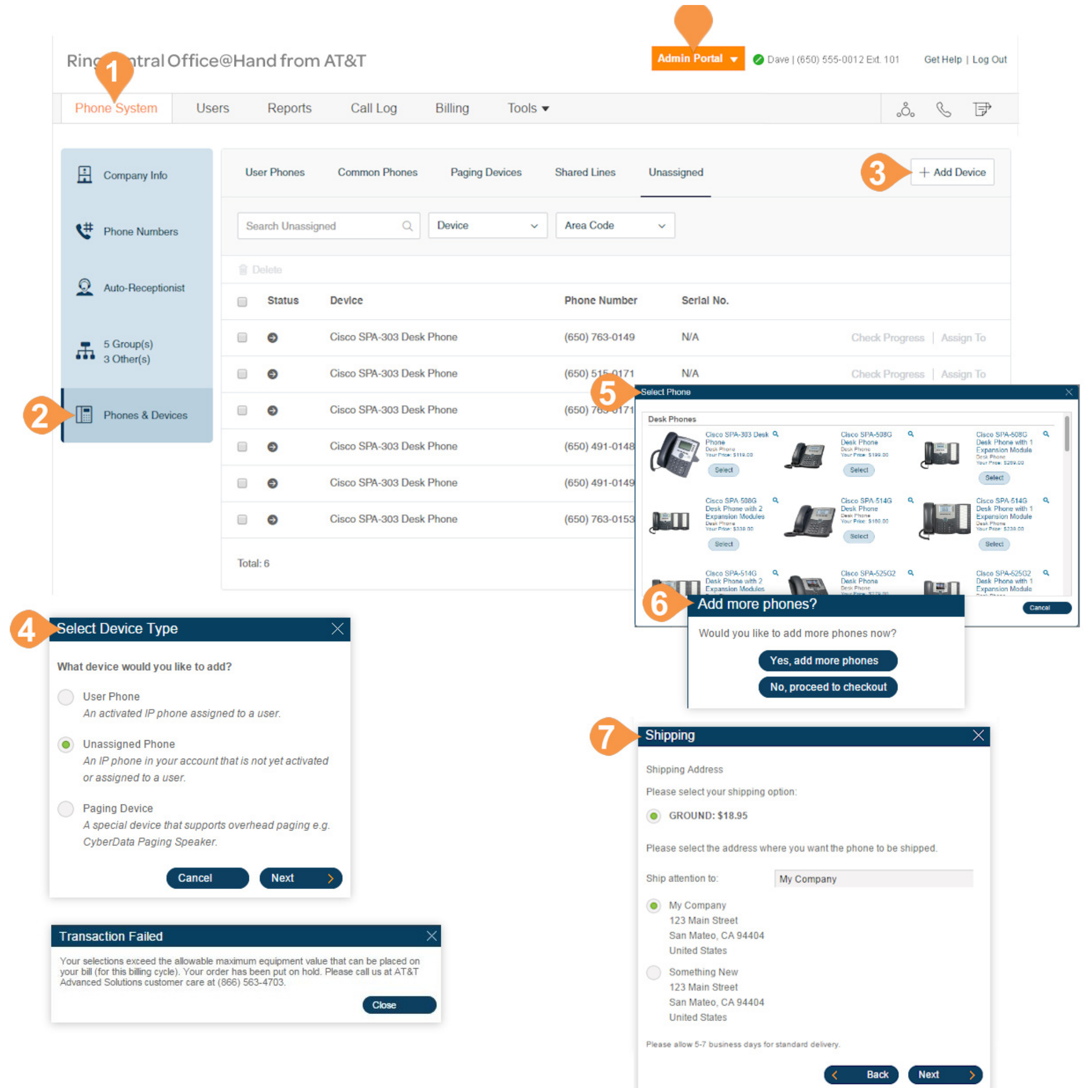


Add an Unassigned Phone

To add an unassigned phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click **Add Device**.
4. Select the button next to **Unassigned Phone** and click **Next**.
5. Select a phone to rent or buy.
6. Choose to add more phones or proceed to checkout.
7. Select your shipping preferences. Confirm your order by checking the acknowledgment box and click **Next**.

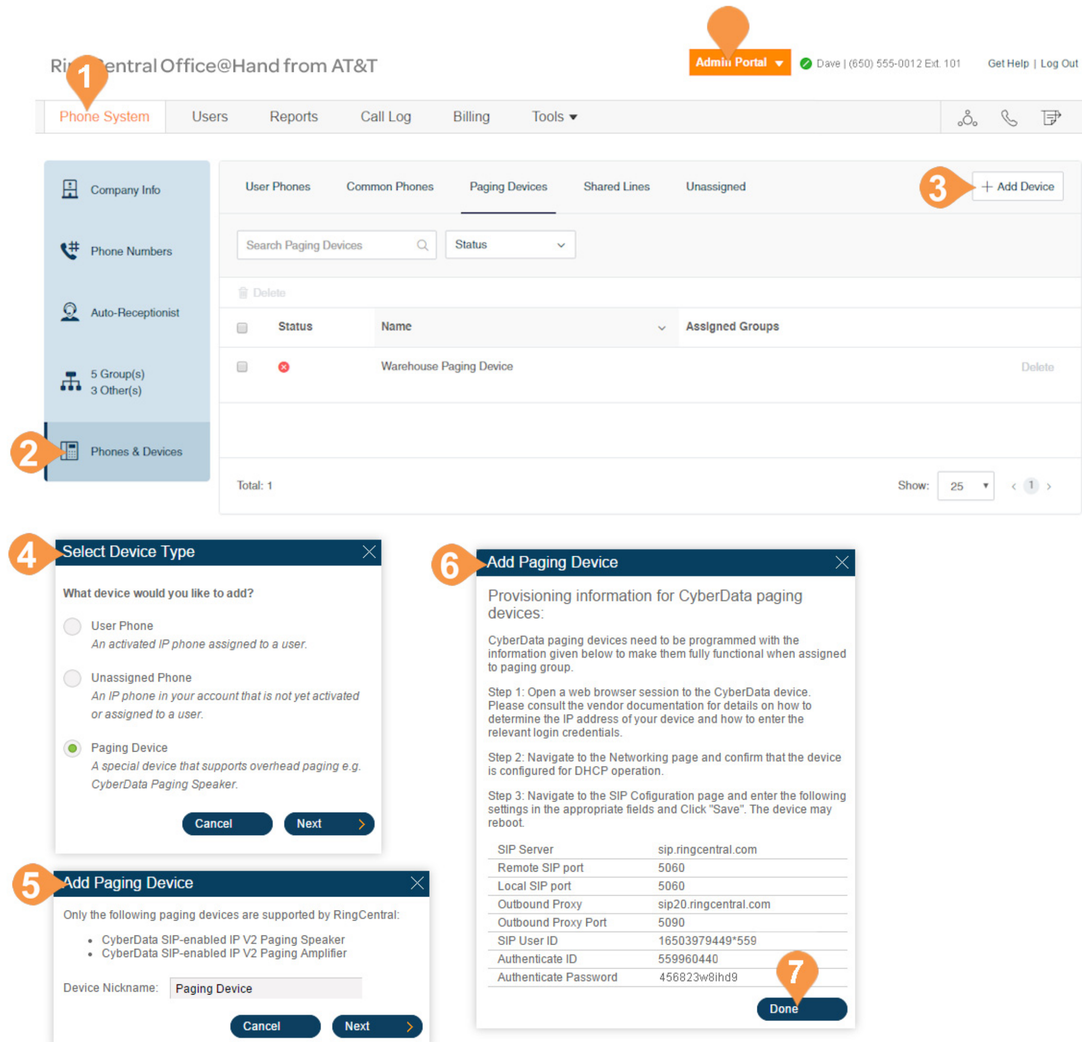
Note: If you have exceeded your device spending limit for your current billing cycle, your transaction will fail and you will see a message warning you that your order has been put on hold. The warning message states: "Your selections exceed the allowable maximum equipment value that can be placed on your bill (for this billing cycle). Your order has been put on hold. Please call us at AT&T Advanced Solutions customer care at (866) 563-4703." You can call the number on the warning message to resolve the issue.



Add a Paging Device

To add a paging device:

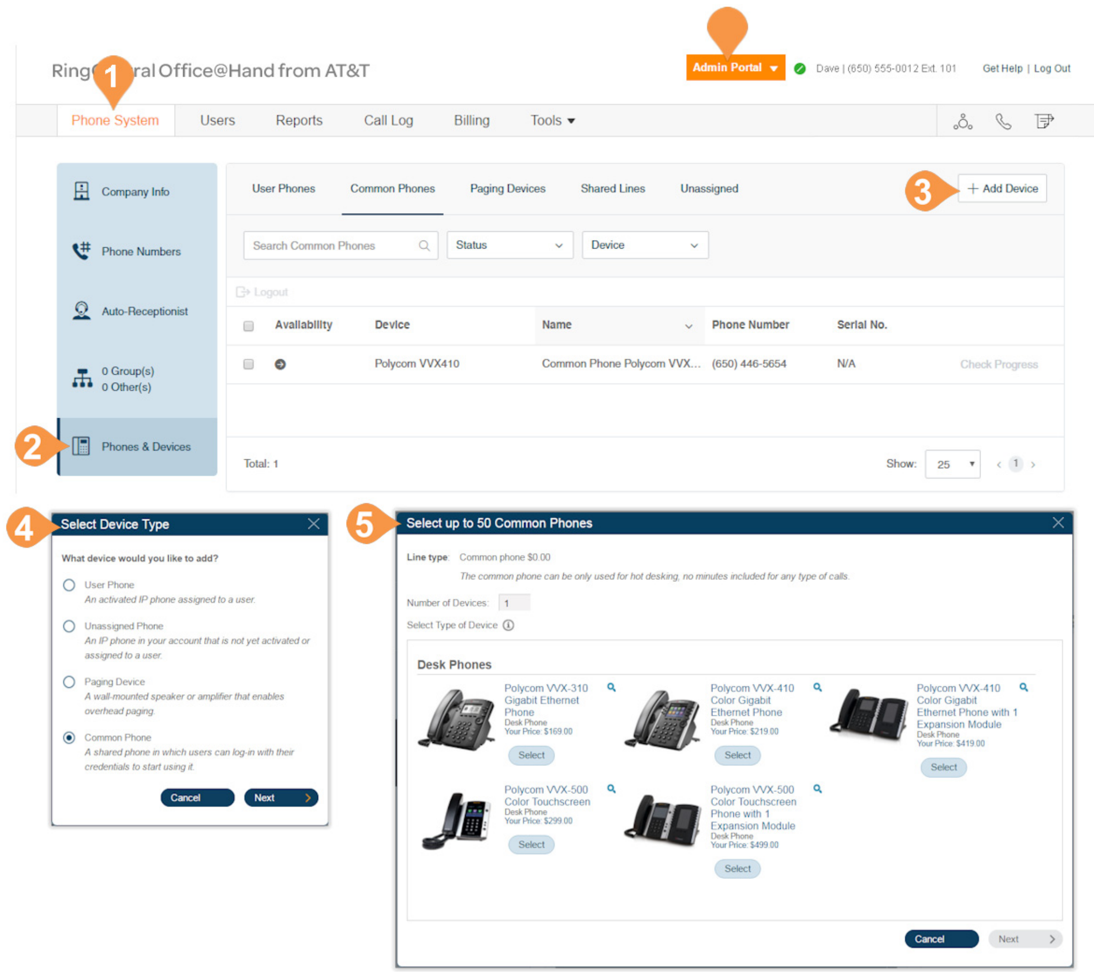
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click **Add Device**.
4. Select the button next to **Paging Device**.
5. View the **Paging Device** choices and click **Next.**
6. View the provisioning information for the device.
7. Click **Done** to add the paging device to your system.



Add a Common Phone

A common phone is only available for hot desking, and enables any employee to log in to a shared phone that adopts the user's phone settings. For more information on managing common phones, see Hot Desking.

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click **Add Device**.
4. Select the button next to **Common Phone**.
5. View the Common Phone choices and click **Next**.
6. Register your **Emergency Address**.
7. Choose to add more phones or proceed to checkout.
8. Select your shipping preferences and click **Next**.
9. Confirm your order by checking the acknowledgment box and click **Next**.



HD Voice*

HD Voice enables higher fidelity voice transmission that offers a more lifelike communication experience. The HD Voice options for your devices can be enabled from your online account.

1. From the **Admin Portal**, select the **Settings** tab.
2. Click **Phones & Devices**.
3. Under **User Phones**, select a phone.
4. Under **Phone Details**, check the box next to **Use HD Voice if possible**.
5. Click **Save**.

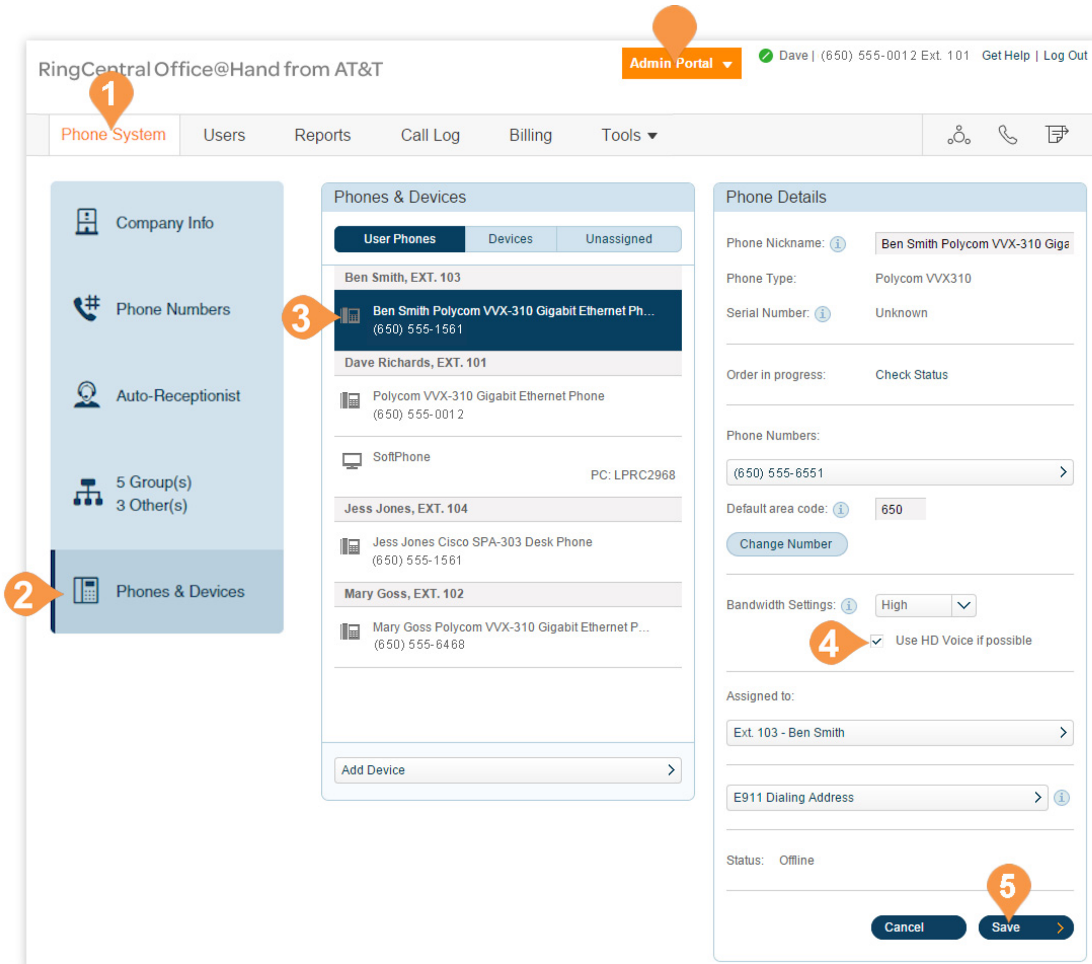
Primary beneficiaries are users calling another extension in their account. Secondary beneficiaries are users calling other Office@Hand users. Supported devices include the following desk phones:

- Polycom IP 550 / 650
- Polycom VVX 310/410/500
- Polycom IP 5000/6000 Conference Phones
- Cisco SPA 303/508/514/525G2

You can also use HD Voice on:

- Office@Hand for Desktop (Windows and Mac)
- Office@Hand mobile app (iOS and Android)

*Available for Office Premium and Enterprise users only.



Hot Desking

Hot Desking

Hot desking* enables any employee to log in to a shared phone that adopts the user's phone settings. Employees who travel from different offices can share the same common phone and desk while keeping their own extension profiles and voicemail access. The admin can view and manage the common phones for hot desking from the Devices tab.

Hot desking is only available for extensions with digital lines. Host phones will not support any inbound or outbound calling without a guest user logged in (except emergency calls).

Common Phone Setup

Hot Desking is required to be set up on a common phone. You can either purchase a new common phone, or convert an existing unassigned Polycom VVX 310, VVX 410, or VVX 500 phone to a common phone. See these sections:

- Add a Common Phone
- Convert an Unassigned Phone to a Common Phone

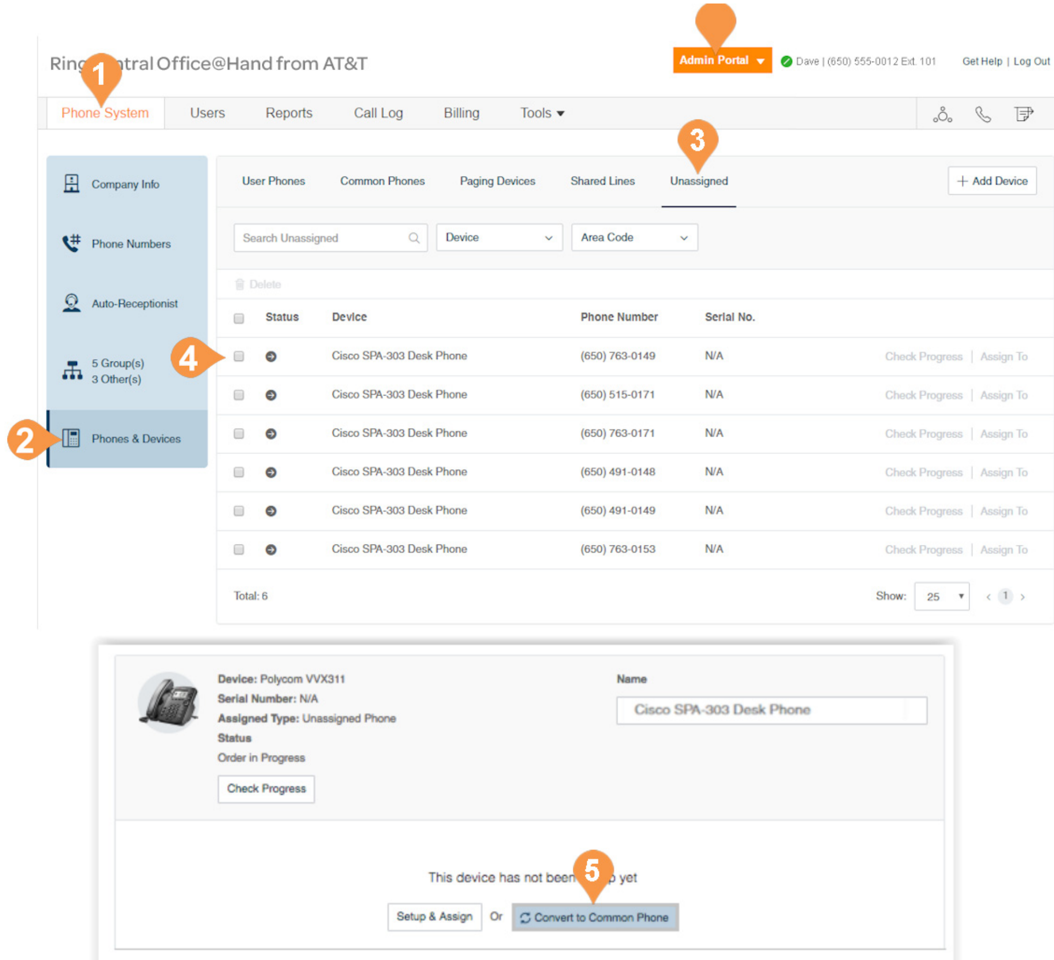
Convert an Unassigned Phone to a Common Phone

Converting an unassigned phone to a common 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 common phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Unassigned** tab.
4. Select an unassigned phone.
5. In Phone Details, select **Convert to Common Phone**.

Follow the instructions to complete the conversion.



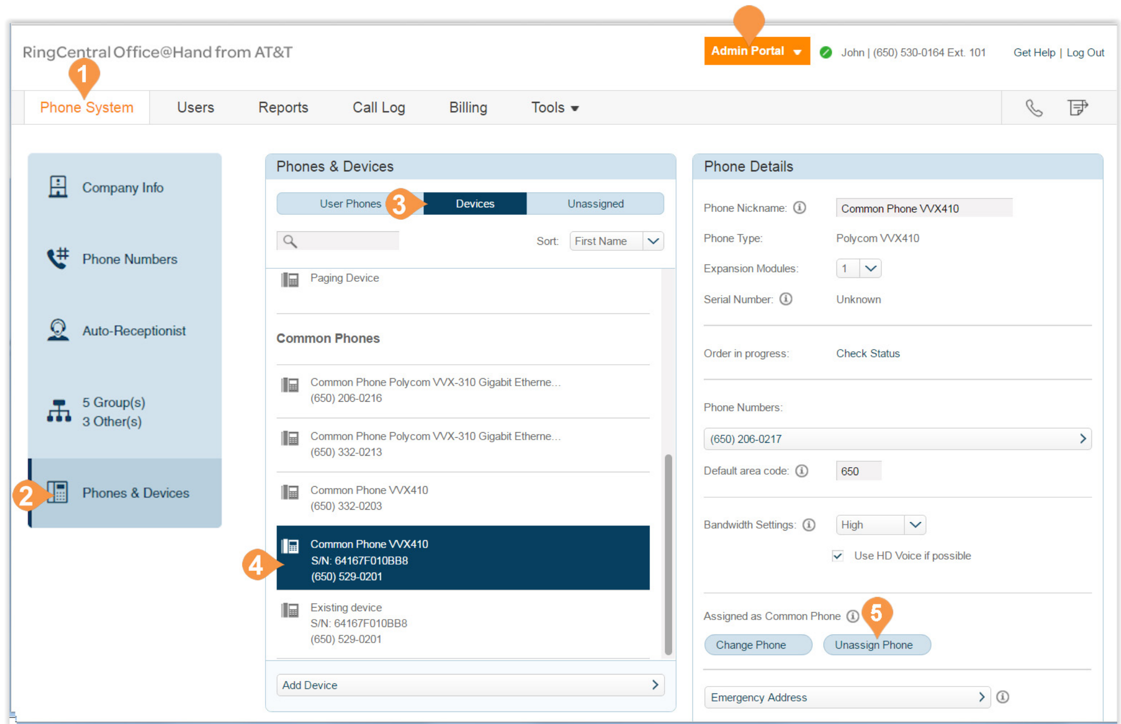
*Available for Office Premium and Enterprise only.

Unassign a Common Phone

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

To unassign a common phone:

1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Devices** tab.
4. Select a common phone.
5. Under Phone Details, select **Unassign Phone**.



Log out a Common Phone

You can log out the currently logged in user from the common phone.

To log out a common phone:

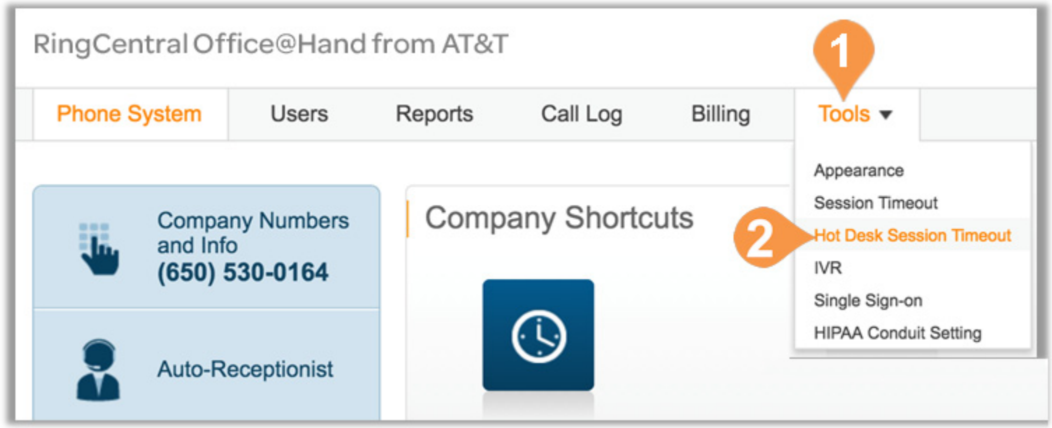
1. From the Admin Portal, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Click the **Devices** tab.
4. Select a common phone.
5. Under Phone Details, select Logout.

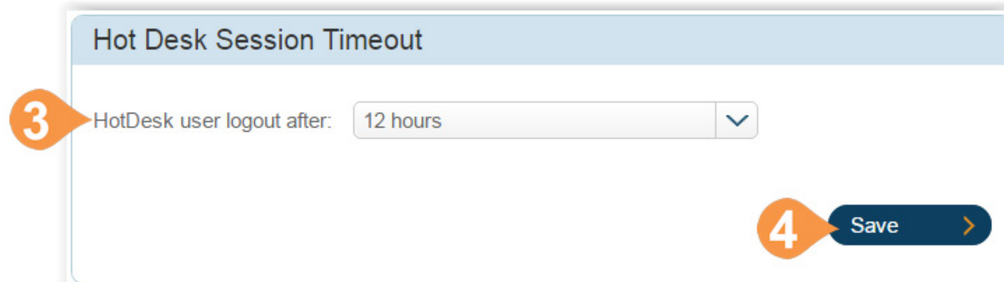
Set the Hot Desking Session Timeout

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.

To set session time out for all common phones:

1. From the **Admin Portal**, select the **Tools** tab.
2. Select **Hot Desk Session Timeout**.
3. Set the session timeout from the menu.
4. Click **Save**.

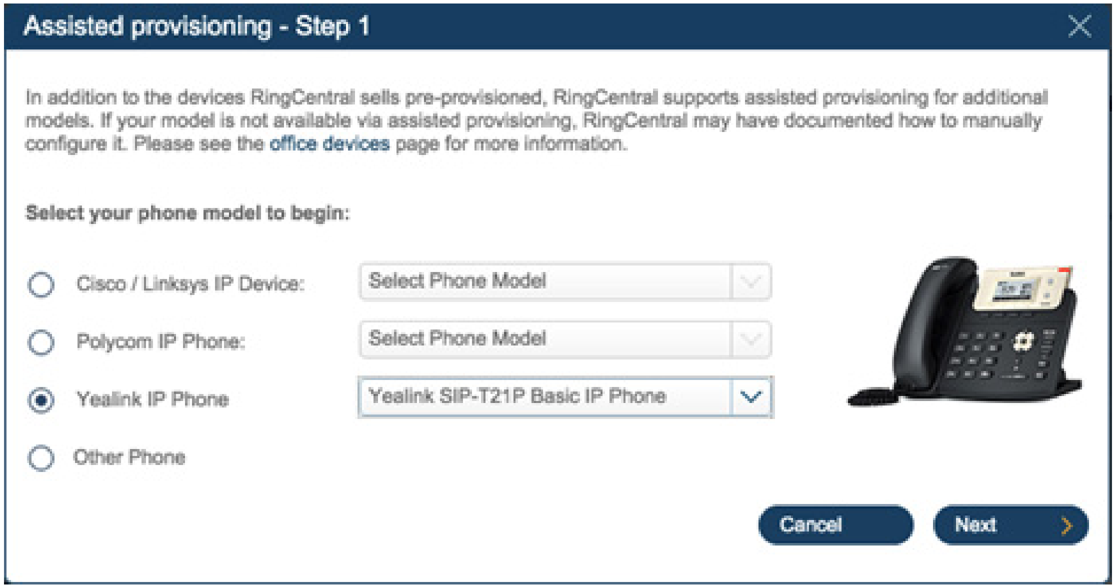




Assisted Provisioning

You can provision supported third-party devices with your service.

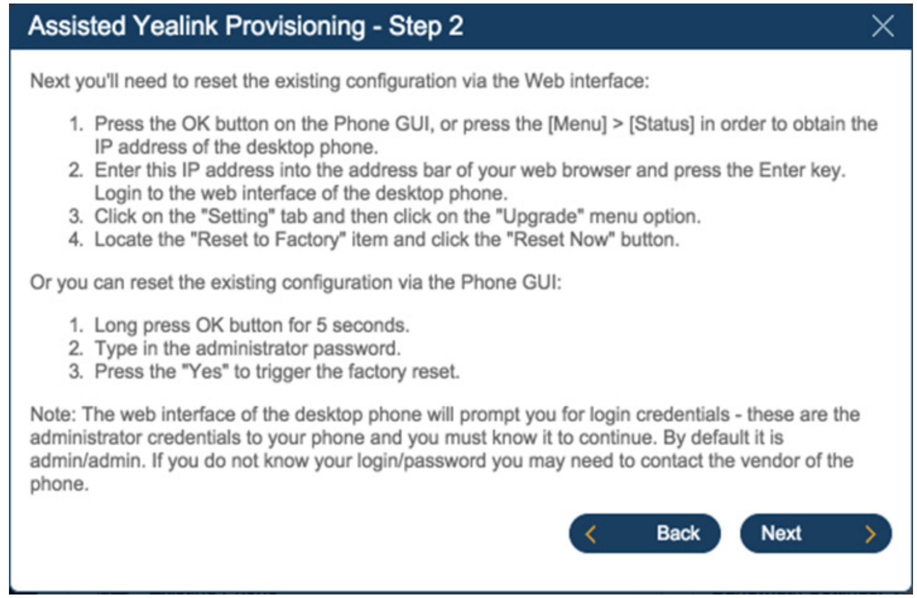
1. From the **Admin Portal**, select the **Phone System** tab.
2. Click **Phones & Devices**.
3. Select the device that needs to be provisioned.
4. Click **Setup and Provision**.
5. Select your phone model. If you have selected:
   a. **Cisco/Linksys IP Devices**: select the phone model from the menu and click **Next**. Proceed with the steps below.
   b. **Polycom IP Phones**: select the phone model from the menu and click **Next**. Proceed with the steps below.
   c. **Yealink IP Phone**: select the phone model from the menu and click **Next**. Proceed with the steps below.
   d. **Other Phone**: click **Next**. 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.

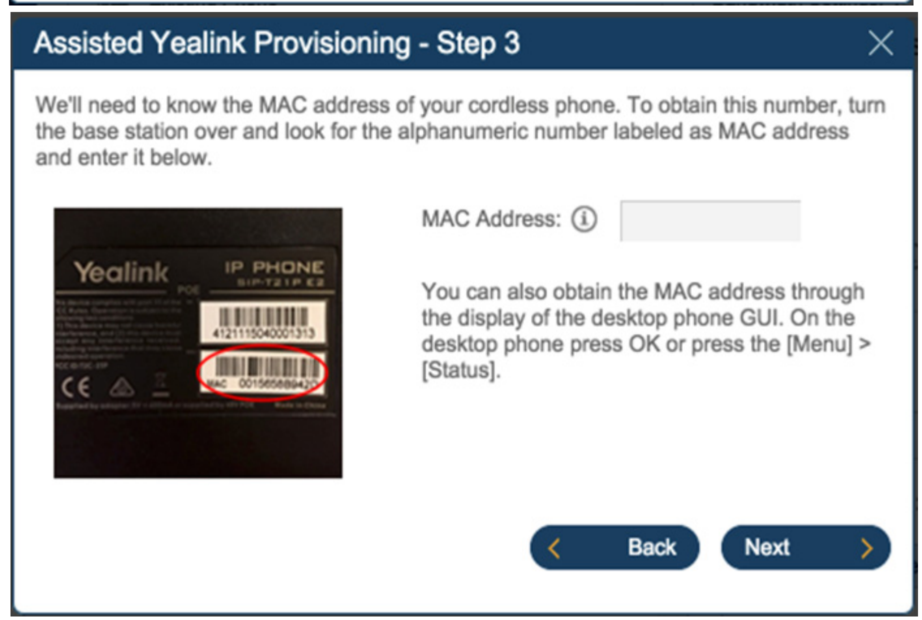


Yealink

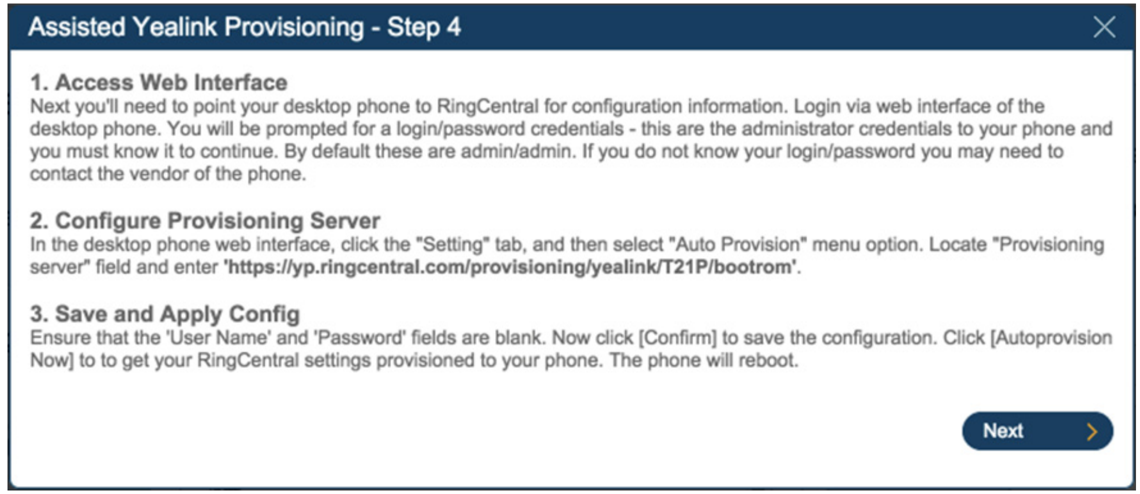
To complete the configuration of a Yealink device:

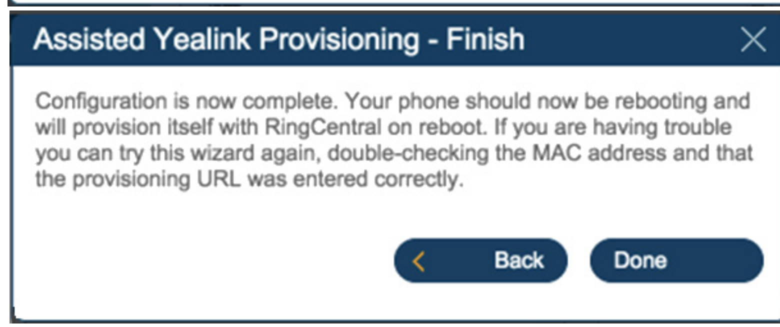
1. **Assisted Yealink Provisioning – Step 2**: follow the instructions to reset the phone's configuration through the phone's web interface, then click **Next**.
2. **Assisted Yealink Provisioning – Step 3**: enter the phone's MAC Address from the rear of the base station, or from the display of the desktop phone UI. Then click **Next**.





3. **Assisted Yealink Provisioning – Step 4**: to complete the process, follow the instructions to configure the phone itself through the phone's web interface. Click **Next**.
4. A confirmation indicates that your device has been provisioned successfully. The phone will reboot and provision itself with RingCentral on reboot. Click **Done**.





Cisco/Linksys IP Devices

To complete the configuration of a Cisco/Linksys IP device:

1. Reset the phone to defaults prior to provisioning to remove any unnecessary settings that may cause failure of provisioning. Refer to your manual on how to reset the phone to defaults.
2. Assisted Cisco/Linksys IP Devices Provisioning – Step 2. Enter the IP Address of the device as instructed and click **Next**. A pop-up window displays a progress bar as it locates and provisions your device.
3. A confirmation indicates that your device has been provisioned successfully.

Polycom

To complete the configuration of a Polycom device:

1. Assisted Polycom Provisioning – Step 2: follow the instructions, then click **Next**.
2. Assisted Polycom Provisioning – Step 3: enter the phone's MAC Address then click **Next**.
3. Assisted Polycom Provisioning – Step 4: follow the instructions to configure the phone itself to complete the process. Click **Done**.

User Management

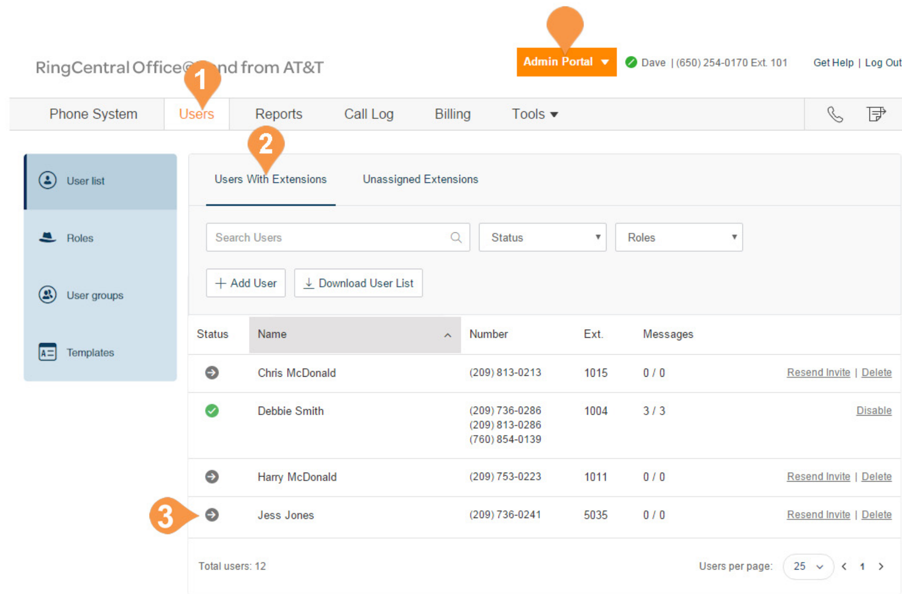
User Management

This section describes user settings actions that only admins can perform.

Users with Extensions

View your users and their extension information as well as any unassigned extensions on your account:

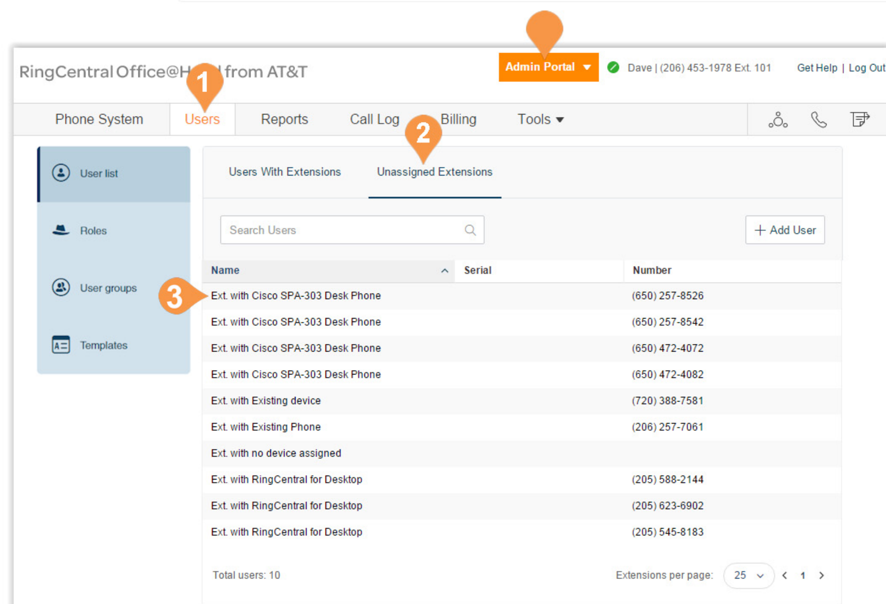
1. From the **Admin Portal**, select the **Users** tab.
2. Click **Users with Extensions** to view the users on your account.
3. Select a user.
4. View or edit the settings for the selected user. See the RingCentral Office@Hand from AT&T User Guide for more information about user settings.



Unassigned Extensions

View unassigned extensions and assign an extension to a new user:

1. From the **Admin Portal**, select the **Users** tab.
2. Click **Unassigned Extensions** to view the unassigned extensions on your account.
3. Select an extension.
4. Enter information about the user that the extension will be assigned to.
5. Click **Save and Enable** to add the user to your phone system.



Add User Extensions and Phones

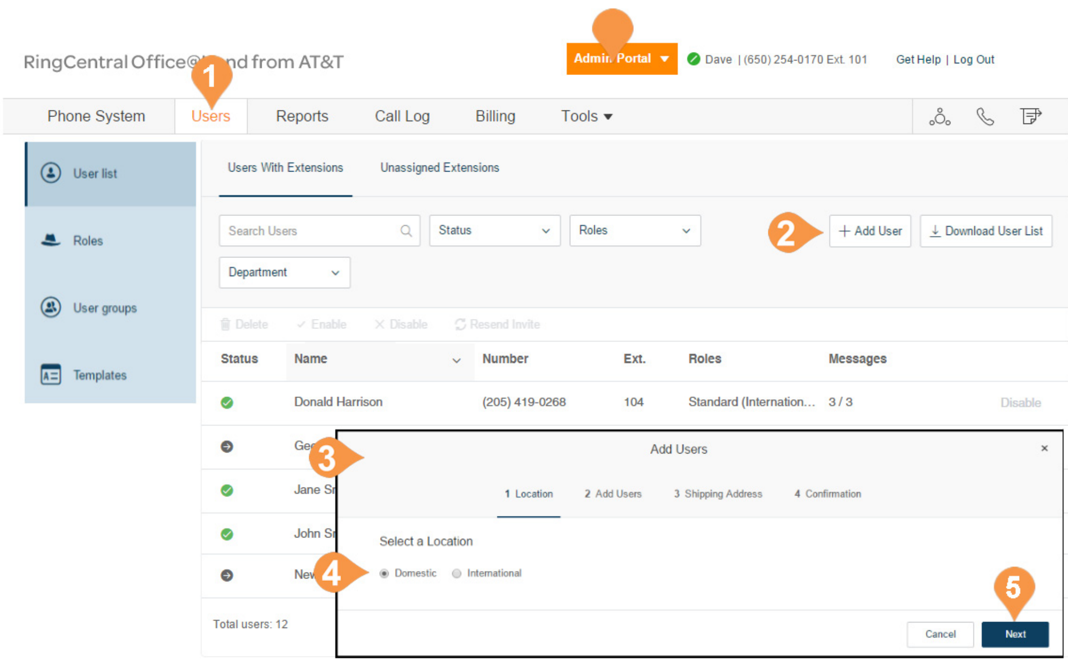
You'll want to add new users to your Office@Hand account as your business grows. As an administrator, you may also need to edit existing user phone settings, assign extensions, and set up new users.

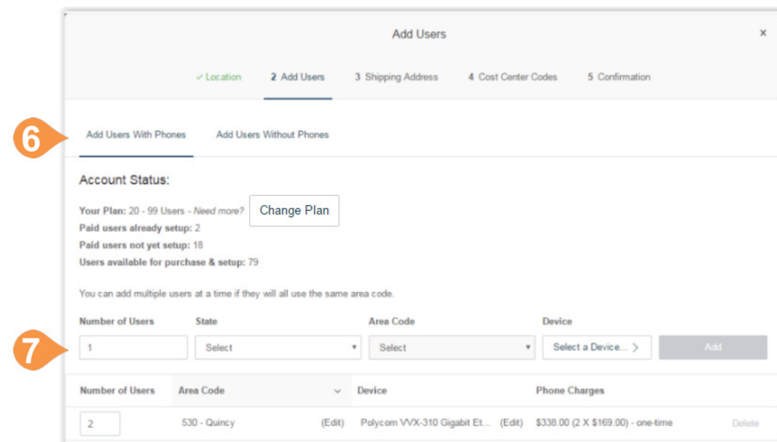
Add Users with Phone Devices

To add users with phone devices:

1. From the **Admin Portal**, select the **Users** tab.
2. Click the **Add User** (**+**) icon.
3. A pop-up window will appear with steps for adding your extension.
4. Select **Domestic** or **International** as the location for your new user. If you'd like to add an International phone number, select a country from the drop-down menu.
5. Click **Next**.
6. Select **Add Users with Phones**.
7. Choose the number of users you'd like to add, the phone numbers you'd like to add for them, and the phones you'd like to add.
8. Follow the prompts for your shipping address and billing information then review and submit your order.

Note: Note: Certain account types restrict the number of users you can add through the Admin Portal. See .





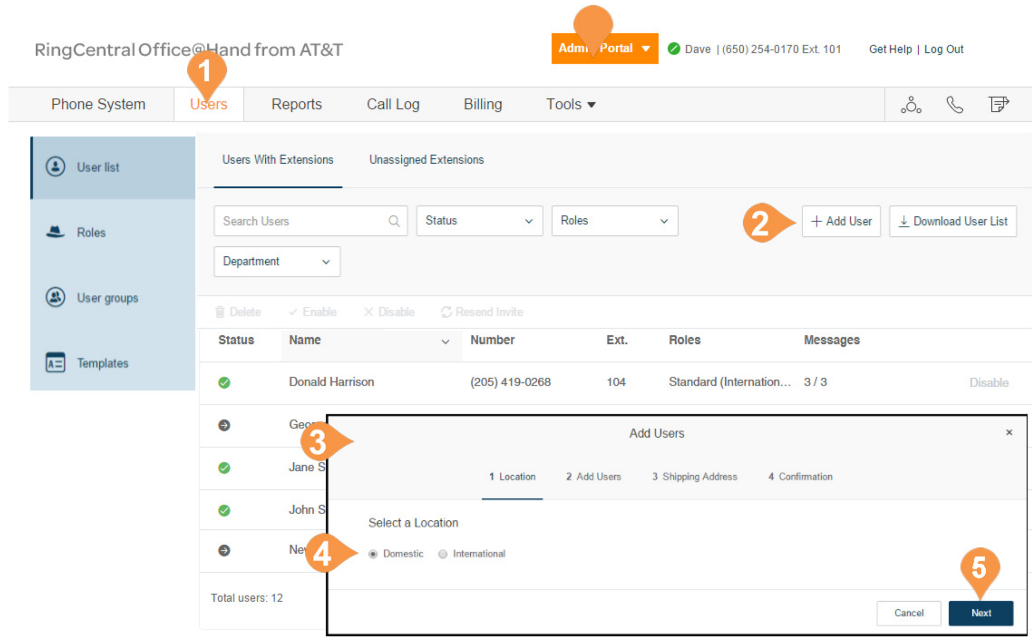
Add Users without Phones

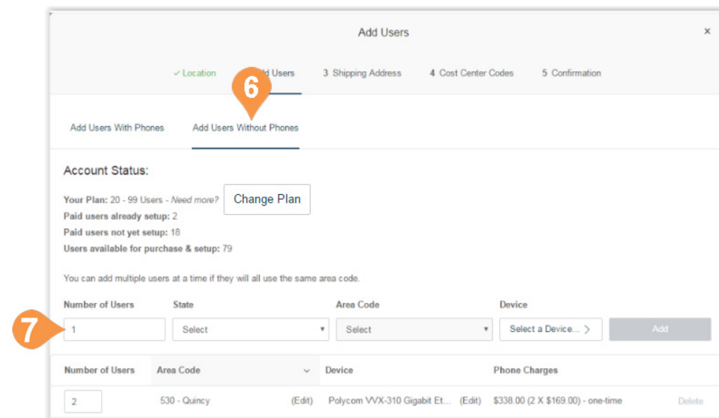
To add users without a phone assigned:

1. From the **Admin Portal**, select the **Users** tab.
2. Click the **Add User** (+) icon.
3. A pop-up window will appear with steps for adding your extension.
4. Select **Domestic** or **International** as the location for your new user. If you'd like to add an International phone number, select a country from the drop-down menu.
5. Click **Next**.
6. Select **Add Users without Phones**.
7. Choose the number of users you'd like to add and the phone numbers you'd like to add for them.
8. Follow the prompts for your shipping address and billing information then review and submit your order.

Note: Note: Certain account types restrict the number of users you can add through the Admin Portal. See .

Note: Note: Users without phones can receive caller ID only on incoming calls, while users with phones can also receive called ID on outbound call\.





Account Type Restrictions in Adding Users

If your account is registered as an Individual Responsibility User (IRU), you are restricted to adding a maximum of 20 users through the Admin Portal.

If you would like to add more users above this limit, you can do so by contacting AT&T Advanced Solutions customer care.

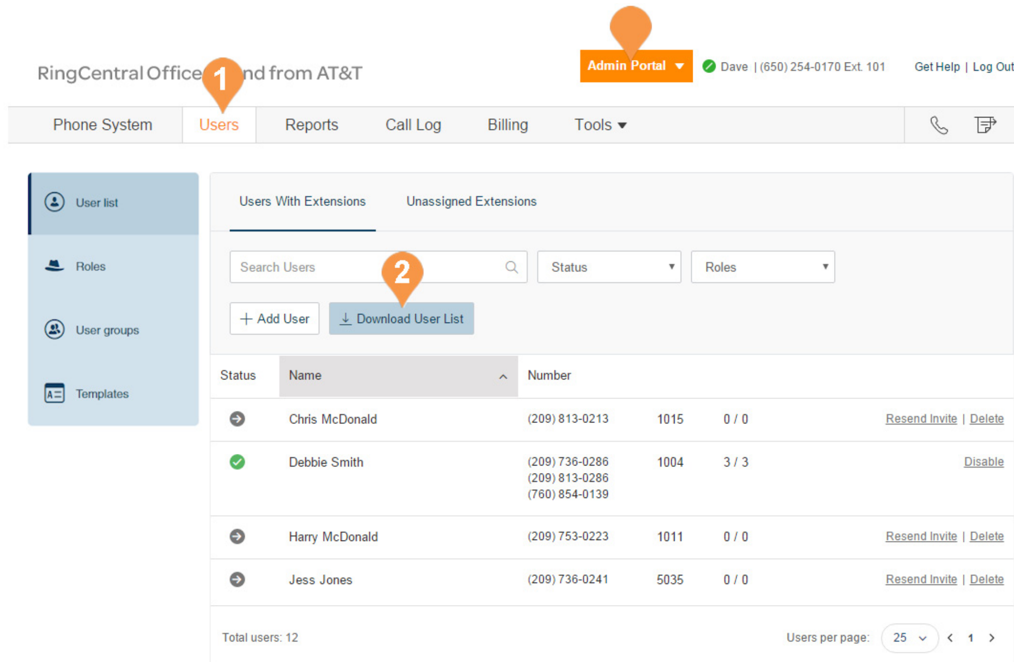
Manage Users and Extensions

In the Users List, you can manage users and extensions.

Export 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. From the **Admin Portal**, select the **Users** tab.
2. To download a list of users and extensions for audit, click **Download User List**.
3. View the file in Microsoft Excel.



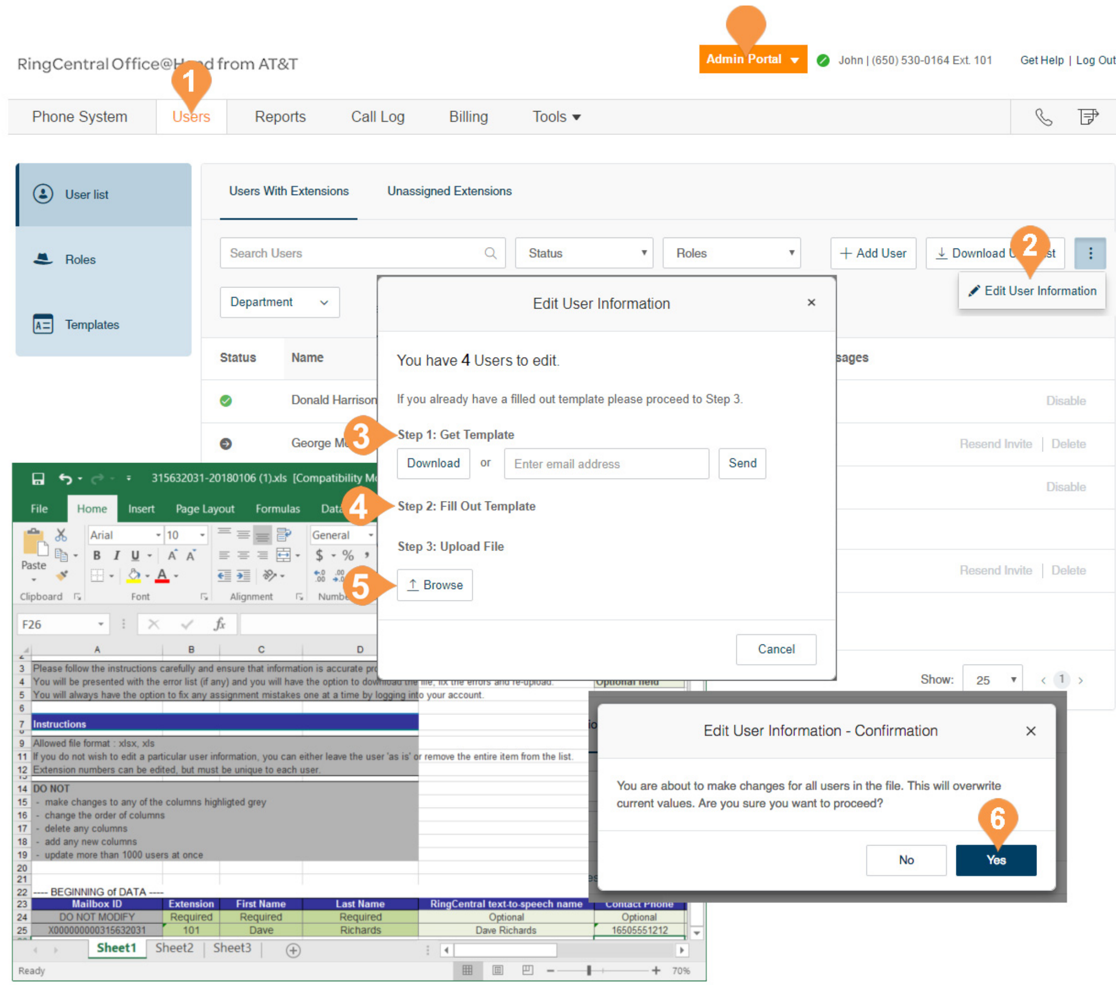
Bulk Edit User Information

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.

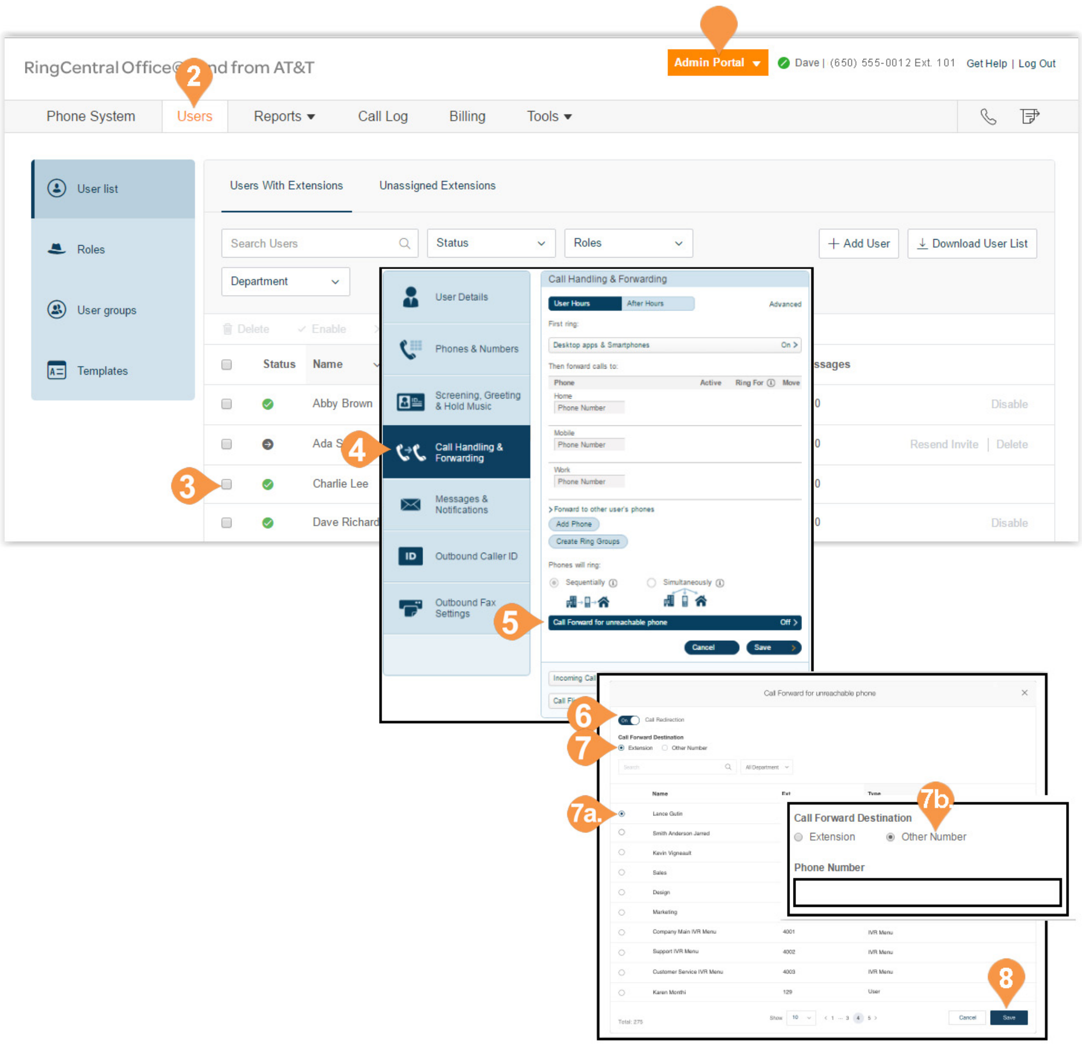
To edit user information in bulk:

1. From the **Admin Portal**, select the **Users** tab.
2. 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.



Call Forwarding for an Unreachable Phone

Manage the rerouting of inbound calls when an Internet outage occurs. This feature is for enterprises where most installed phones are desktop phones and there is little-to-no access via mobile or soft phones. When triggered, the call will be handled by the forwarded extension's Call Handling & Message rules like Voicemail. Once Internet service is restored, the incoming calls will automatically resume to ring the user endpoint phone as usual.



Feature Activation

- By default, Call Forwarding for Unreachable Phone is not available for configuration in your online account. Contact Office@Hand Support to turn on this feature in your account.
- Once activated for your account, you must be an administrator to enable and configure Call Forwarding for Unreachable Phone.
- The feature is disabled when the **Notify my Desktop App** or **Smartphone** features are enabled.

Use Call Forwarding for Unreachable Phone with these extensions or groups:

- Individual user extensions that have desk phones and/or Office@Hand for Desktop with a digital line.
- Virtual extensions with call forwarding to desk phones and/or Office@Hand for Desktop with a digital line.
- A Shared Line group

The feature is available in Call Handling for:

- Business Hours
- After Hours

User Settings

Users Settings

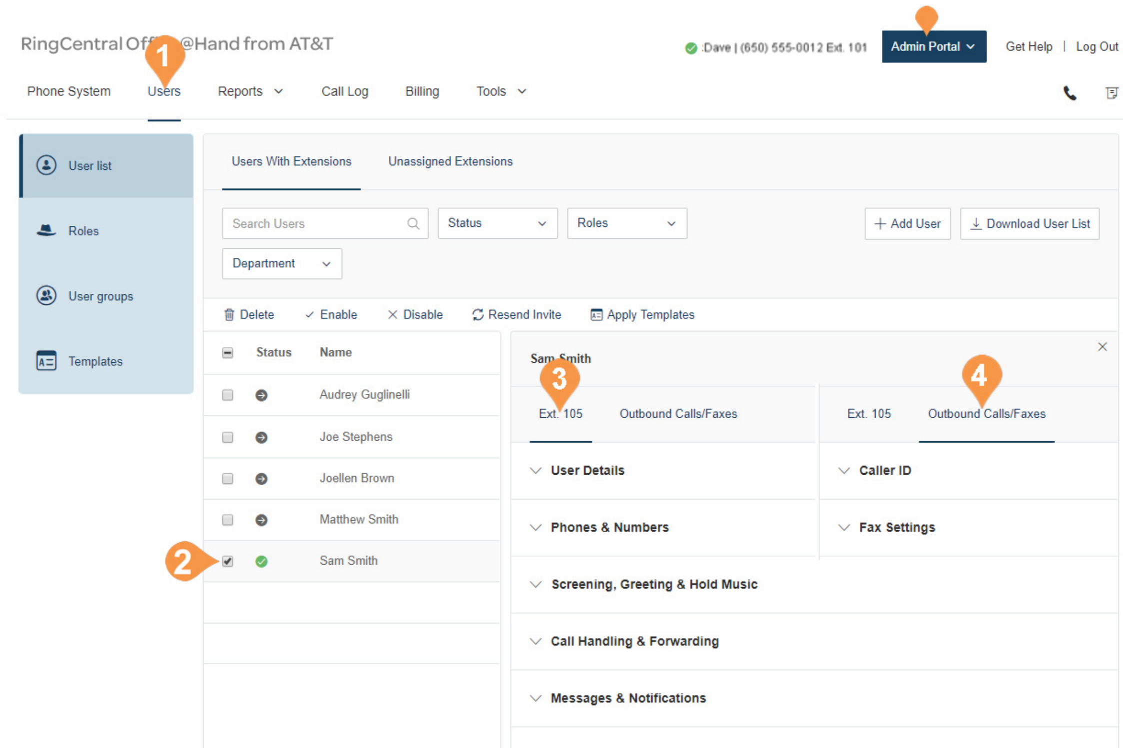
Admins have the ability to edit the following settings for users in the phone system:

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

Learn more about each of these settings in the RingCentral Office@Hand from AT&T User Guide.

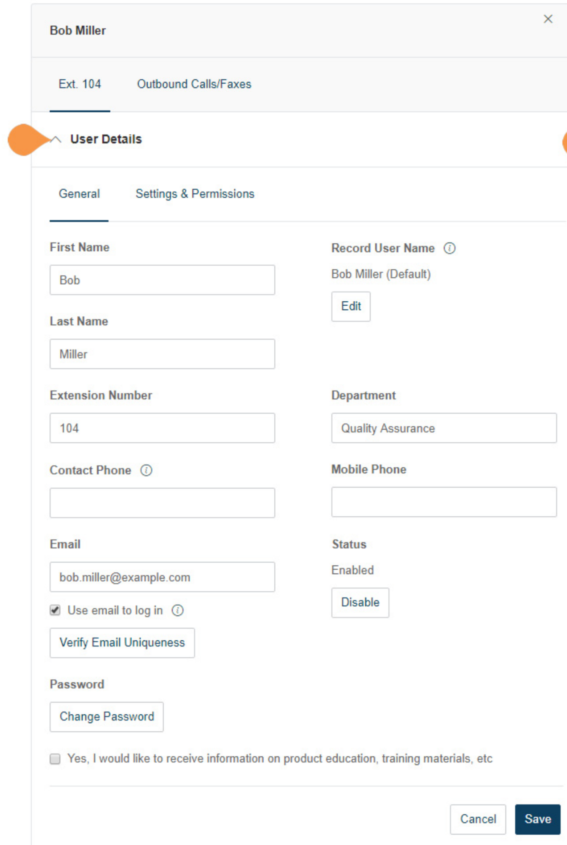
Administrators will use the Users section to access and edit these settings.

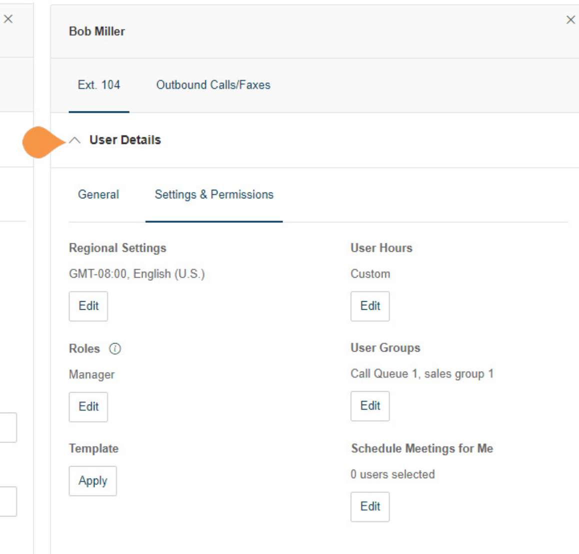
1. From the **Admin Portal**, select the **Users** tab.
2. Select a user.
3. On the user settings pane,
   - Select the extension, for example, Ext. 105, then the category to edit.
4. On the user settings pane,
   - Select Outbound Calls/Faxes, then the category to edit.



User Details

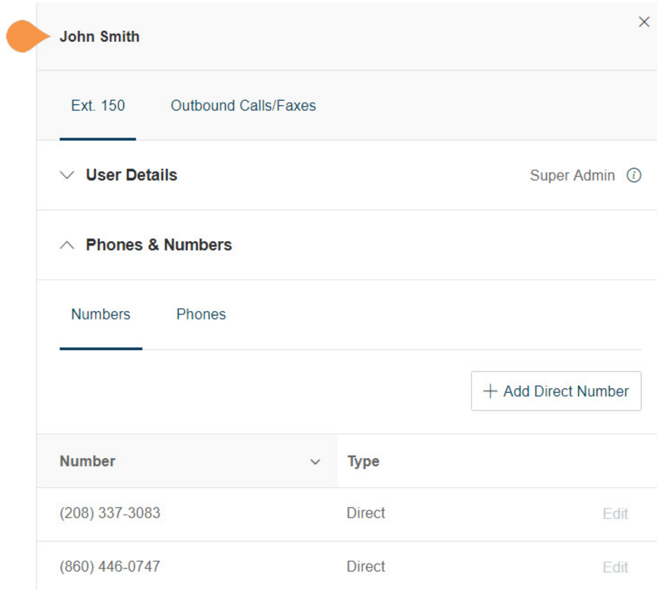
Click on **User Details** to view and edit the selected user's information. From this menu, you can edit a user's extension, name, recording, phone numbers, email address, department, roles, user groups, hours, password, and regional settings.

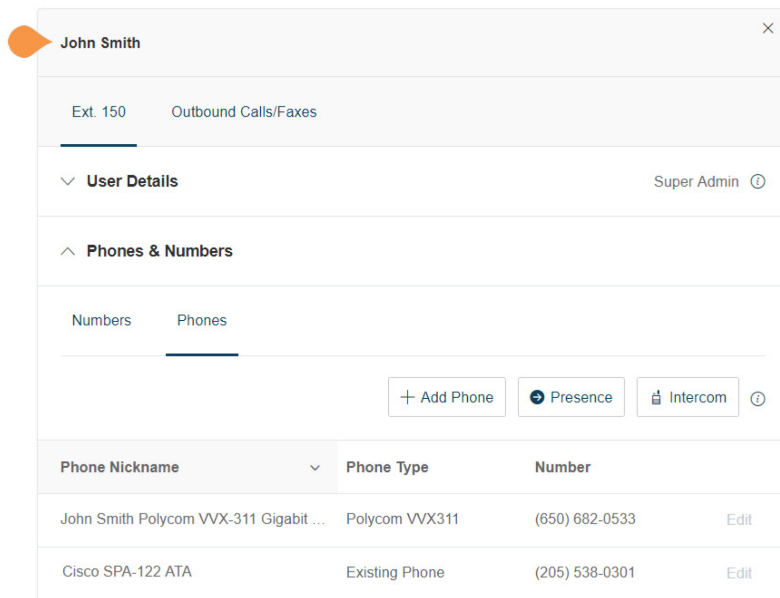




Phones & Numbers

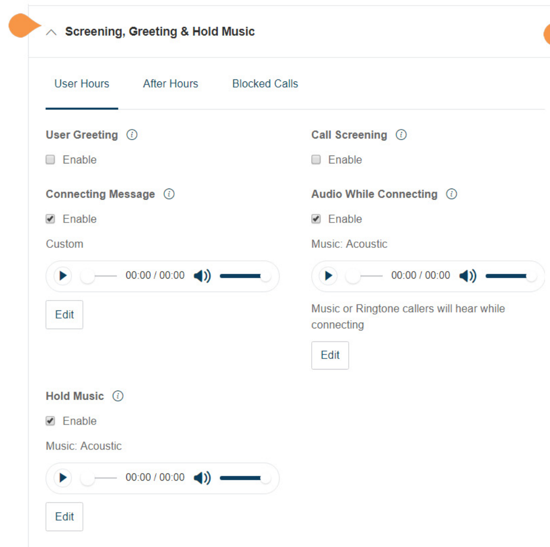
Click **Phones & Numbers** to view and edit the selected user's phone numbers and phone settings. You can add a direct number for this user, add a phone, download/ activate apps, change presence and intercom settings, and view and edit conference settings.

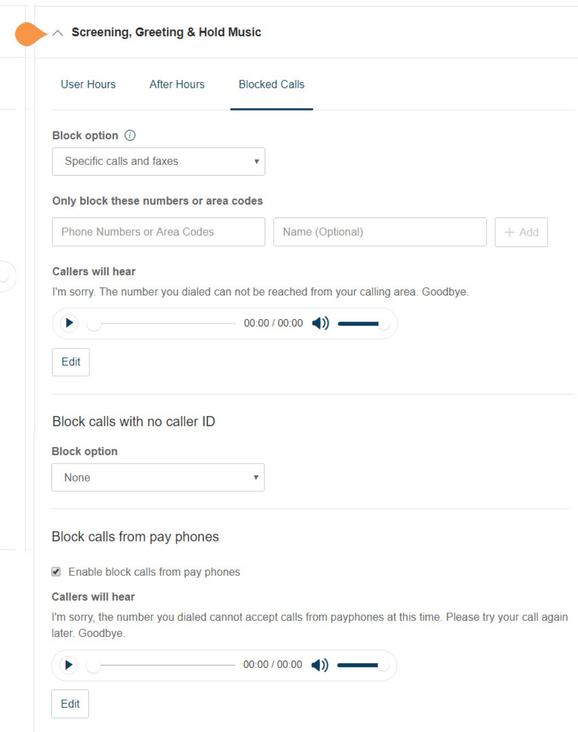




Screening, Greeting & Hold Music

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.





Call Handling & Forwarding

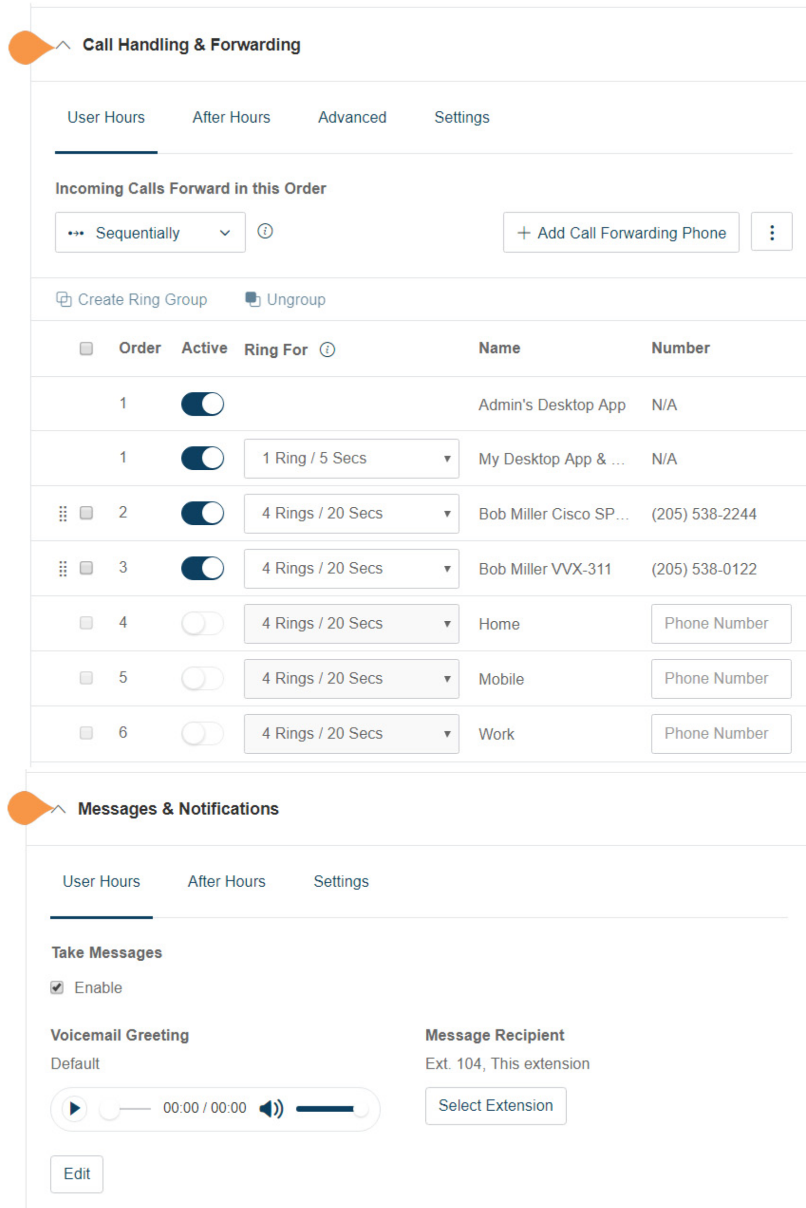
Click **Call Handling & Forwarding** to view and edit the selected user's call handling, call forwarding, ring group, additional phones, ring pattern, incoming call, and call flip settings.

Setting Call Forwarding on the Phone Hardware

You can enable and disable call forward options on some equipment, such as Polycom® VVX® phones. The ability to 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 on Busy** menu option is not supported.
- The Call Forward selection on the phone setup between multiple devices is restricted to run only three times.

A 911 call back, if received on the user's phone with Call Forward enabled is forwarded to the destination.



Messages & Notifications

Click **Messages & Notifications** to view and edit the selected user's voicemail settings, voicemail greeting, message recipient, messages, and notification settings.

Roles and Permissions

Manage Roles and Permissions

Roles and permissions allow you to enforce your company security policy by providing a flexible, role-based access control in 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 seven predefined roles. These roles cannot be modified.

- 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, features plus analytics features.
- User Admin: Full access to user administration (self and others), international dialing, 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): Full access to user level settings, access to features plus international dialing.
- Standard: Full access to user level settings, access to features and no international dialing.

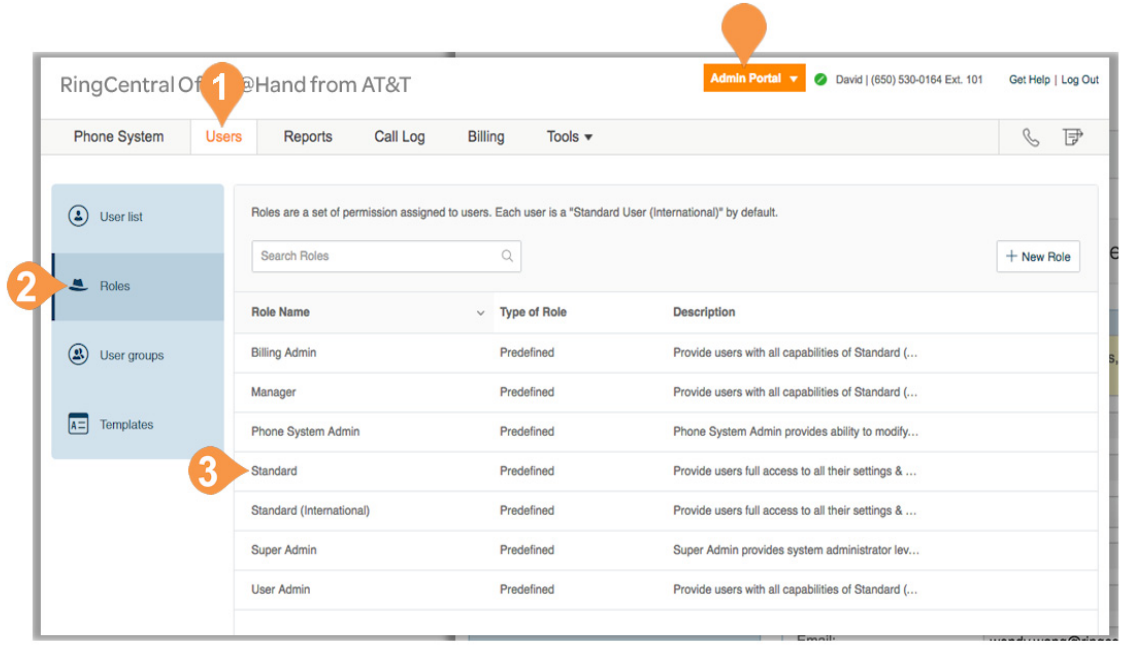
Custom Roles

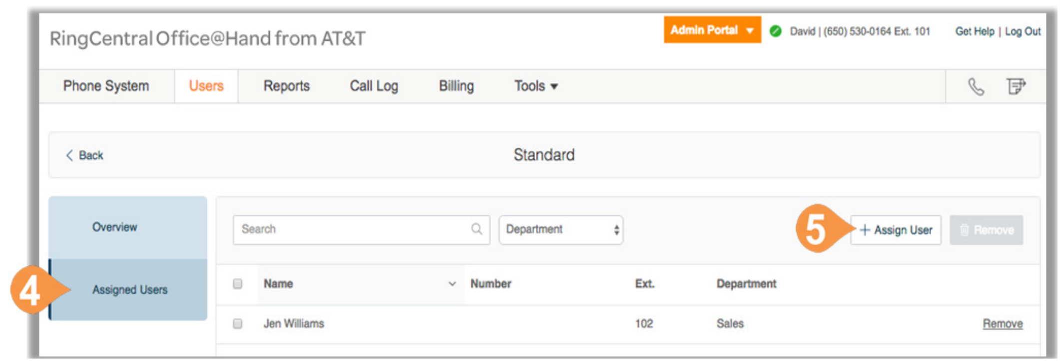
You can create custom roles to meet your business needs. When creating a custom role you select an existing role as a starting point, and select the permissions to be assigned to the role.

Assign Users to a Role

To assign users to a role:

1. From the Admin Portal, select the **Users** tab.
2. Click **Roles**.
3. Select one of the roles to assign users to.
4. Click the **Assign Users** tab to view the users currently assigned to the role.
5. Click **Assign User**.
6. A list of users and their currently assigned roles is displayed.
7. Select the users to assign to the role.
8. Click **Assign**.
9. The users' roles are assigned and the new role assignments are displayed in the User list.

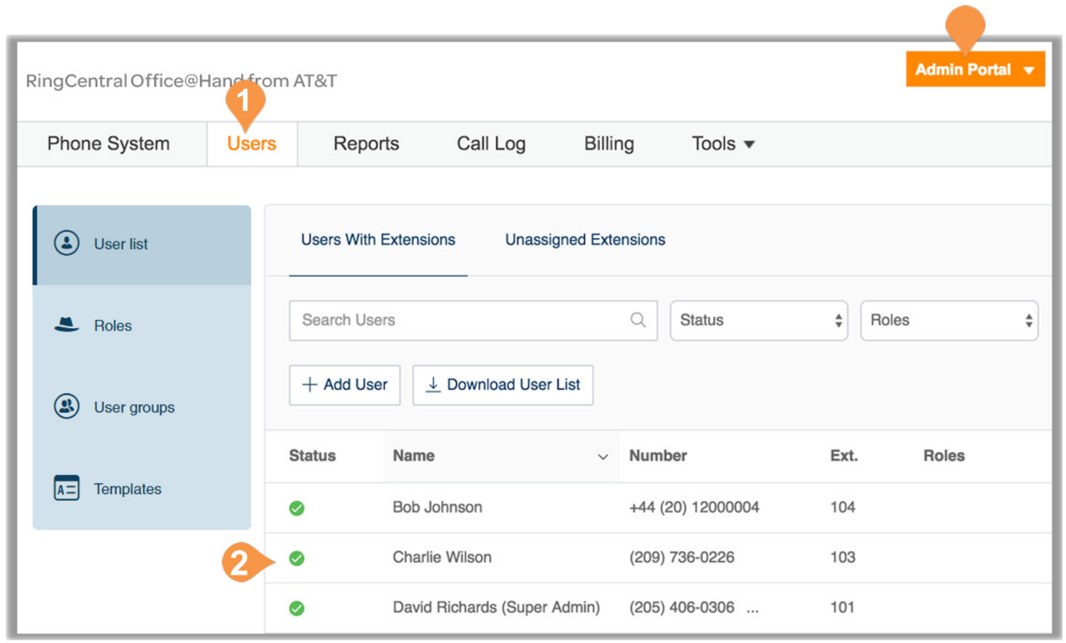


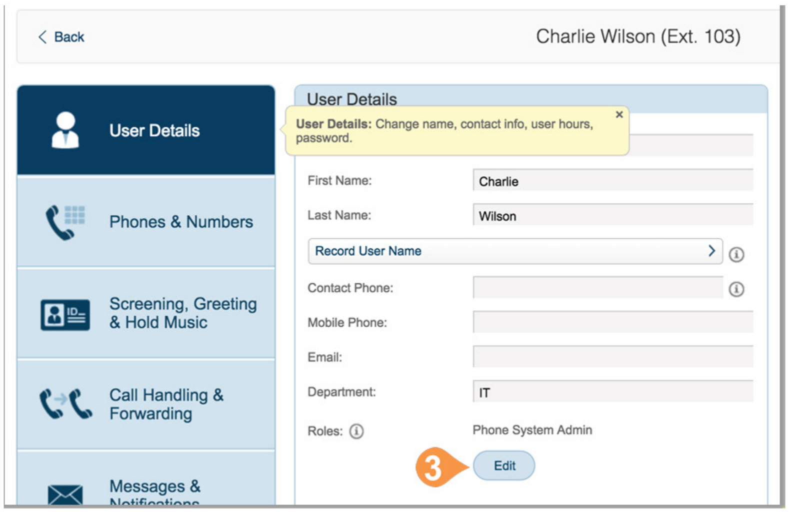


Modify a User's Role

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

1. From the Admin Portal, select the **Users** tab.
2. Click the user whose role you will modify.
3. Click the **Edit** button next to **Role**.
4. Select the role.
5. Click **Save**.

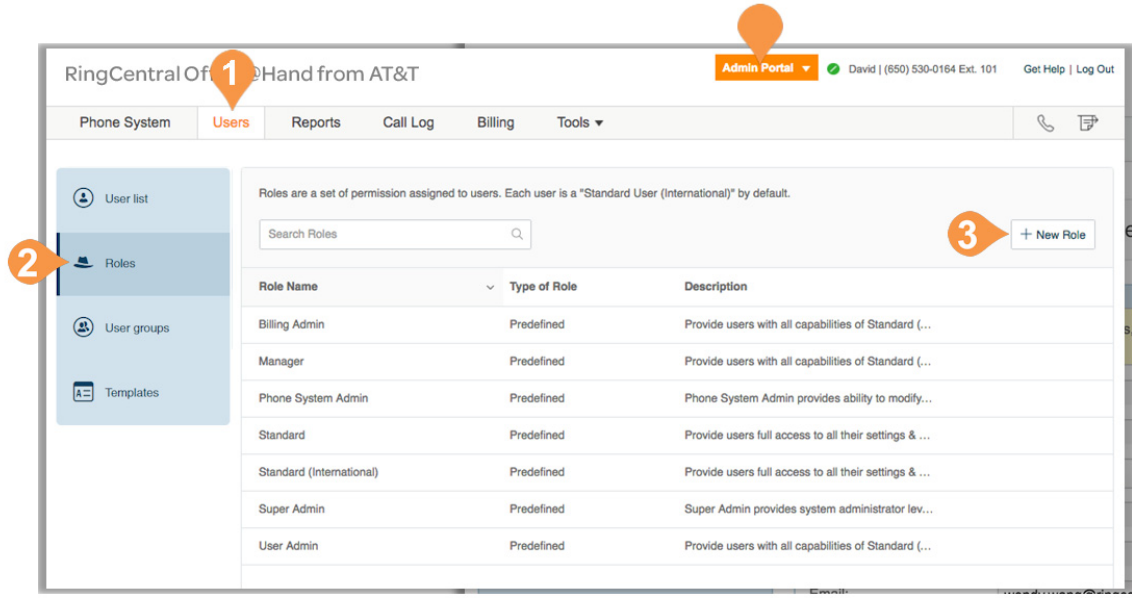




Create a New Role

To create a new custom role:

1. From the Admin Portal, select the **Users** tab.
2. Click the **Roles** panel.
3. Click **New Role**. to launch the Create New Role wizard.

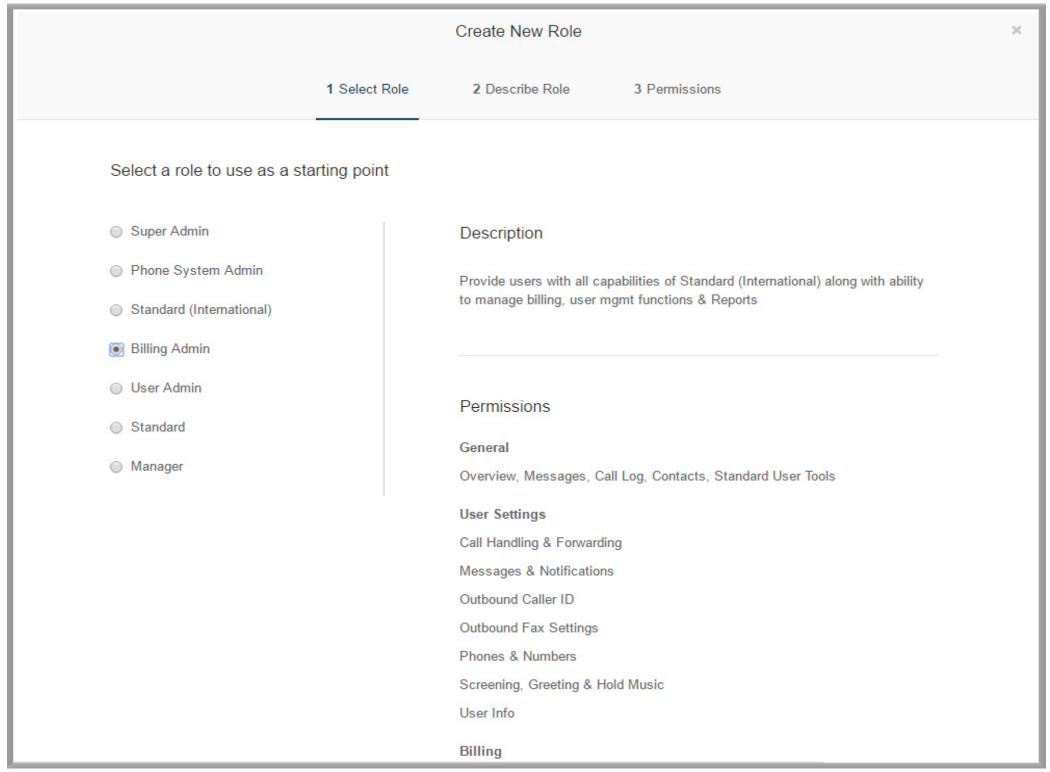


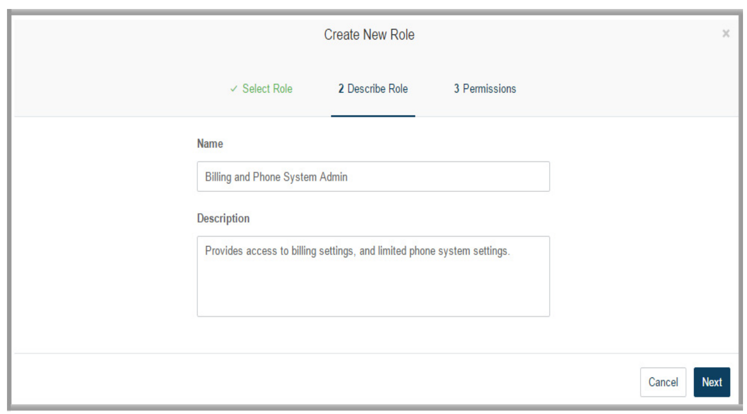
Step 1: Select Role:

Select a role to use as a starting point. The permissions included in the starting role are displayed. You will be able to modify these permissions when creating the role.

Step 2: Describe Role

Enter a **Name** for the role and a **Description** of the permissions of the role.

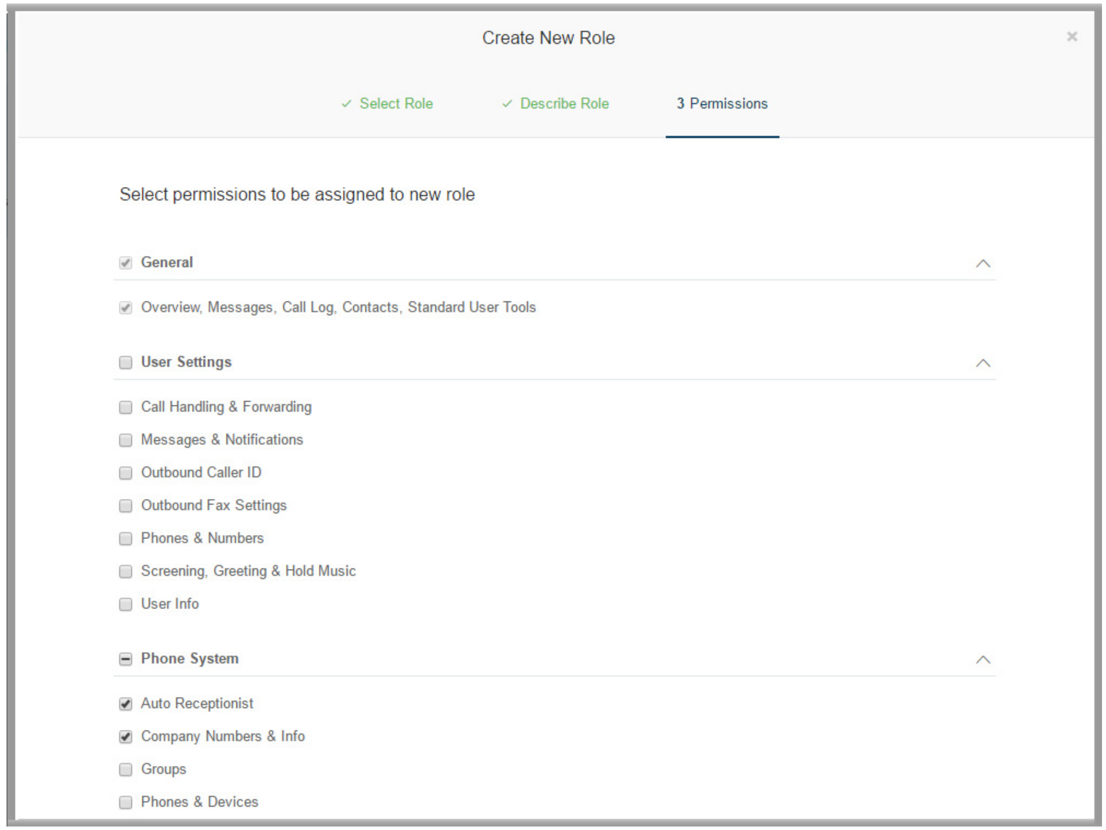




Step 3: Permissions

Select the permissions for the role by adding to or removing permissions as required.

The role is created and appears in the list on the Roles panel. To assign users to the role, see “Assign Users to a Role ” on page 142.

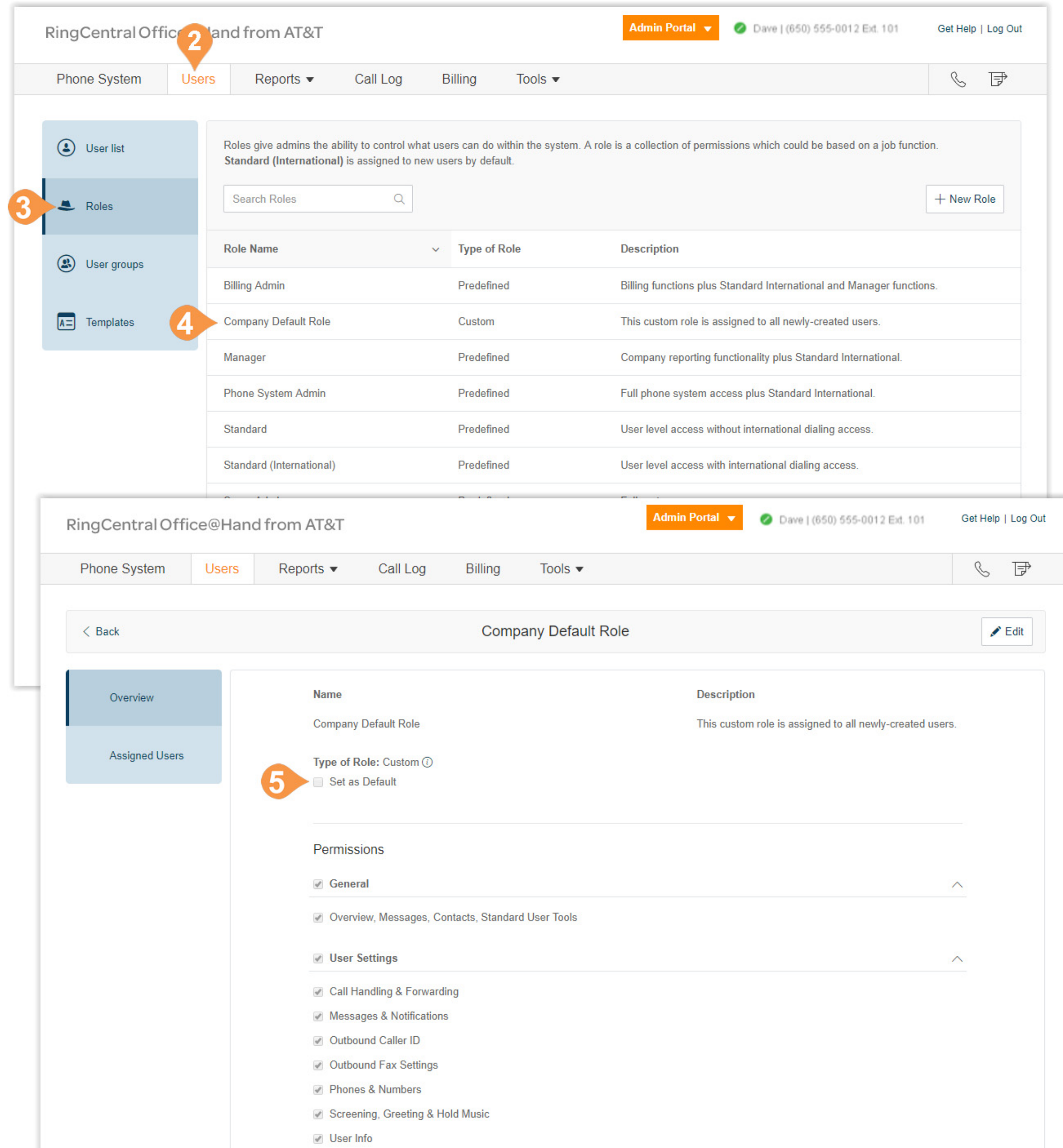


Setting a Custom Default Role

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. See "Create a New Role" on page 144.
2. From the Admin Portal, click **Users**.
3. Click **Roles**.
4. Select the custom role you created.
5. Click the check box, **Set as Default**.

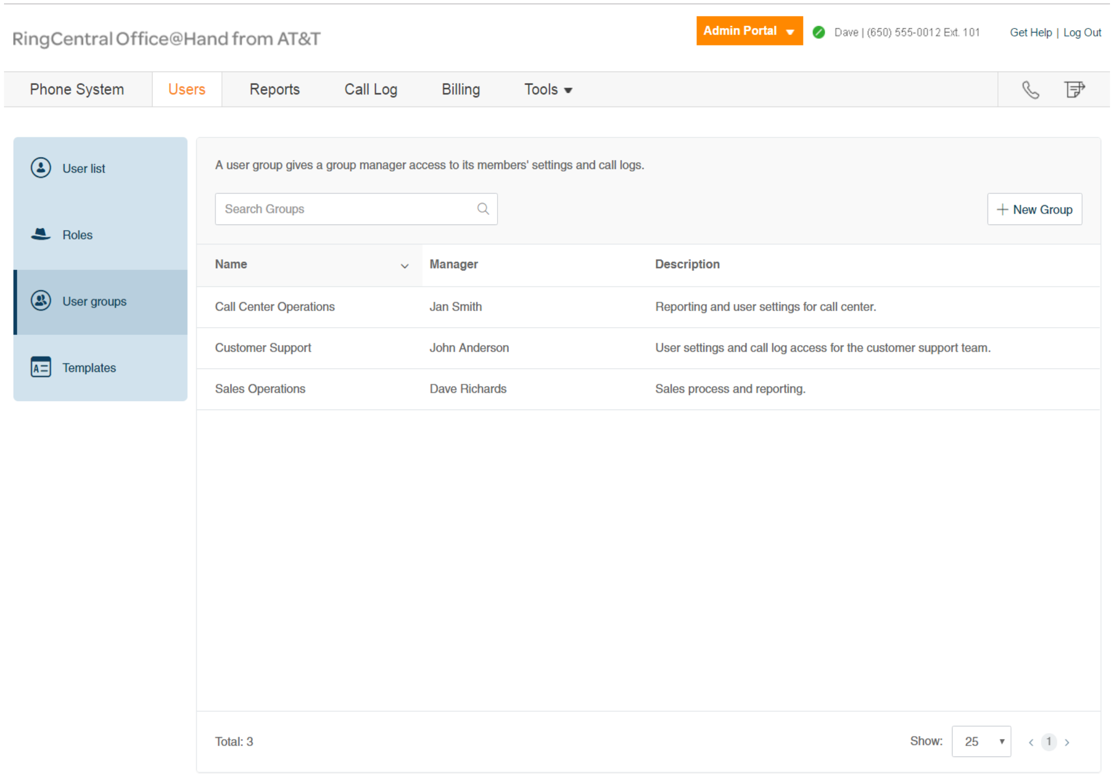


User Groups

Manage User Groups*

A RingCentral User Group is a grouping of users based on an organization hierarchy. A user group is managed by a user group manager who can access and modify group members' settings and view their call logs and reports. The account administrator controls who gets access to view or create user groups.

The account administrator can create 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) reporting to the director, you might create three user groups: one group for each of the team managers, and an overall group for the director that includes all the 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.

* Available for Office Premium and Enterprise only.

User Group Management Tasks

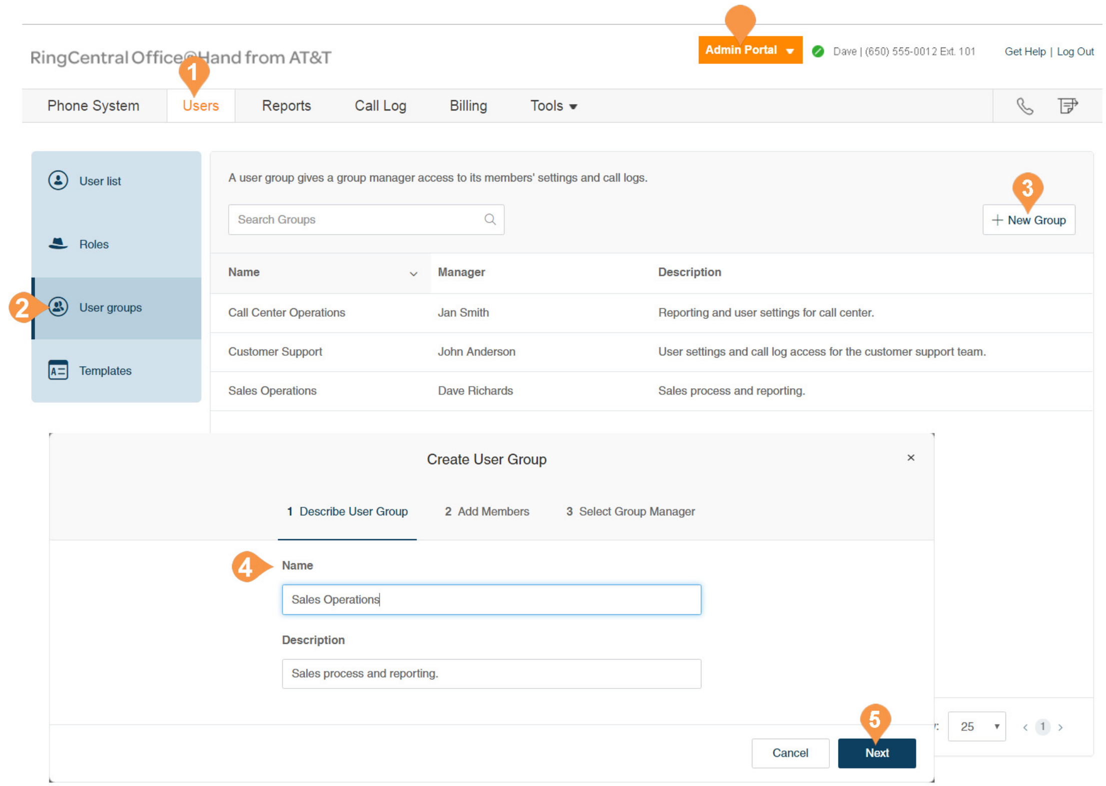
The tasks involved in managing user groups include:

- **Assigning Users to User Groups:** See the Templates section in user management to streamline assigning users to user groups. Do this using the User Groups option in Templates. See “Templates” on page 155.
- **Viewing and modifying User Settings:** See the User Settings section, in the user management User List to view and modify the settings assigned to a group member, including the roles and user groups in the User Details section. See “Users Settings” on page 135.
- **Accessing Reports for your group members:** Office@Hand Reports help 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. See “Reports” on page 163.

Create a User Group

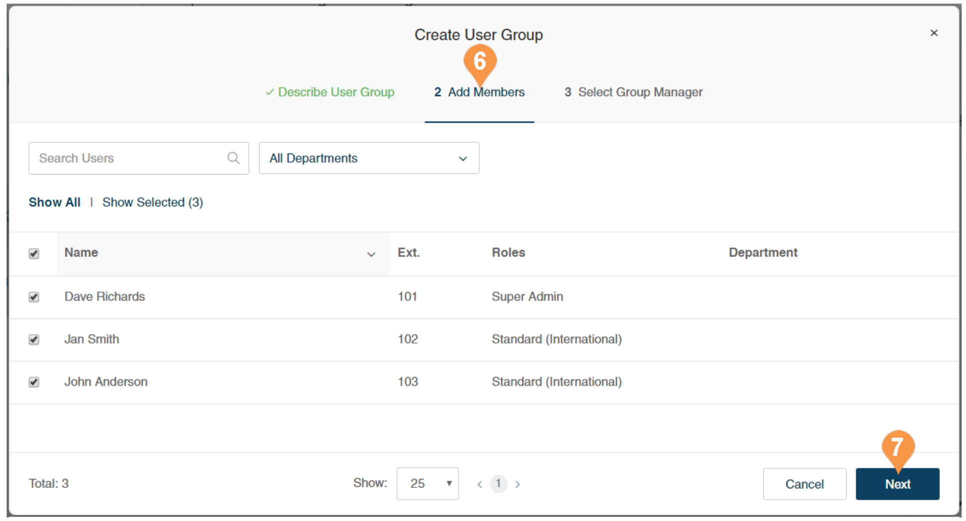
When you create a user group, you describe the group, add members to the groups, and assign a group manager who can modify members' settings and view their call logs.

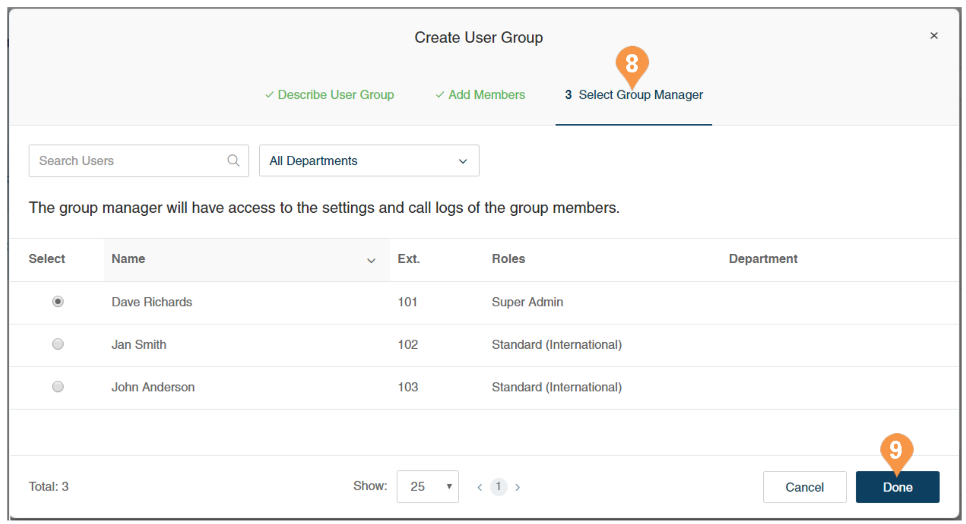
1. From the **Admin Portal**, click the **Users** tab.
2. Click **User Groups**. You will see a list of existing user groups, if any.
3. Click **Create** (if no user groups exist), or click **New Group**.
4. Enter a **Name** and **Description** for the user group.
5. Click **Next**.

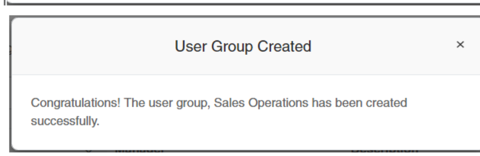


6. Add members to the user group. Search by department or all departments, and check to select the users.
7. Click **Next**.
8. Select a member of the user group to be the user group manager. (The manager must be a member of the user group).
9. Click **Done**.

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.





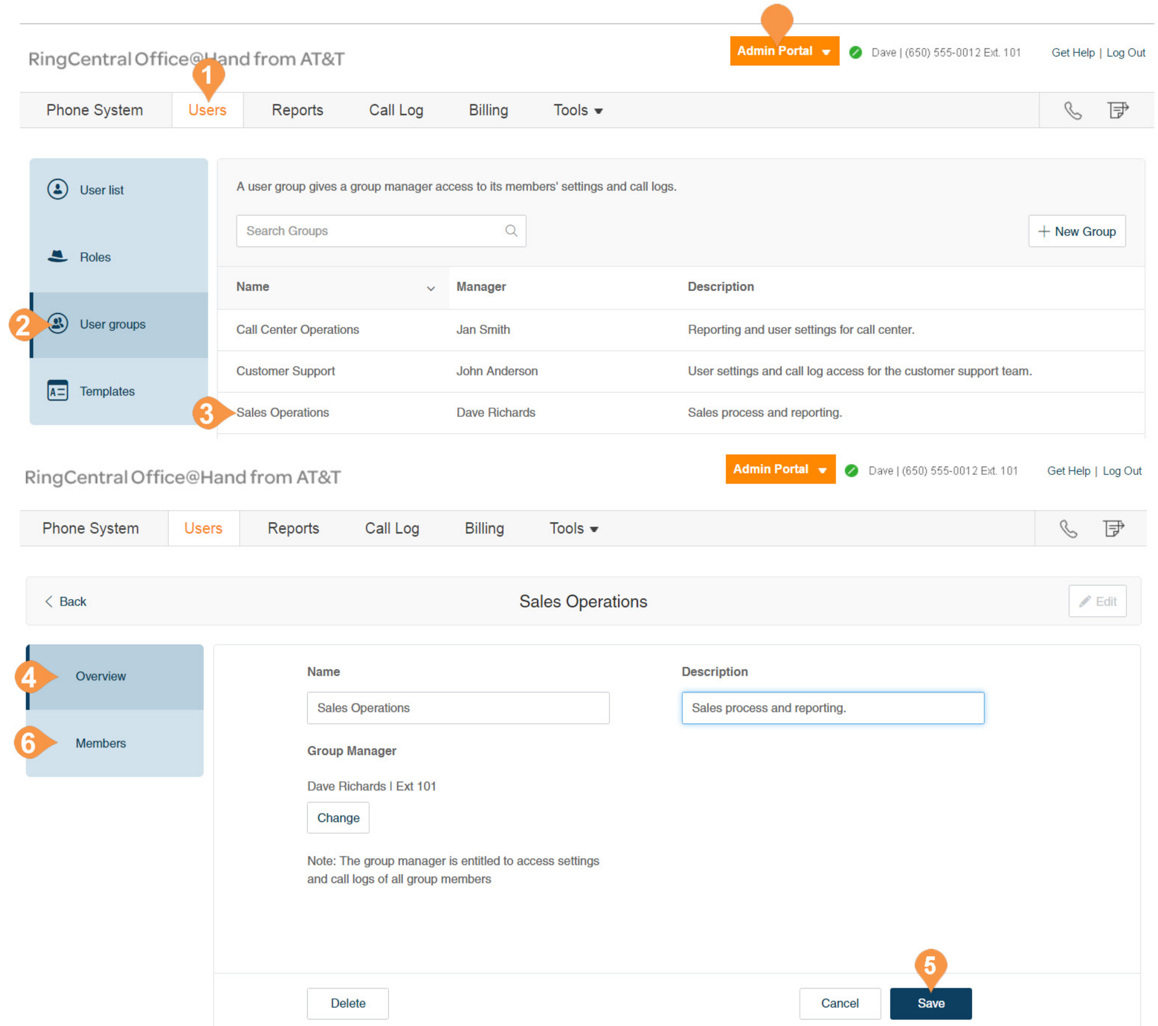


Edit a User Group

To edit or delete an existing user group:

1. From the **Admin Portal**, click the **Users** tab.
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 to 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.



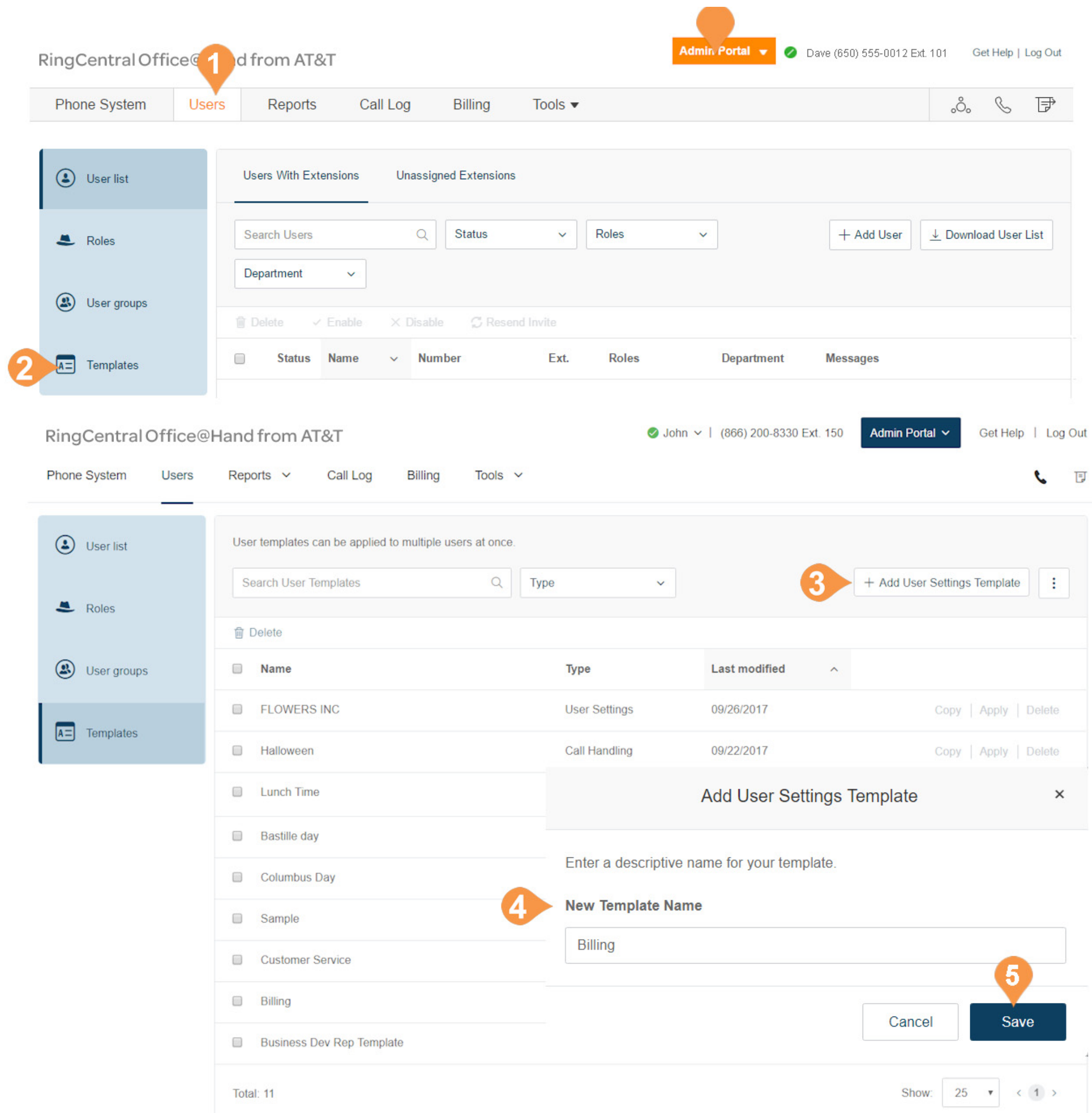
Templates

Templates

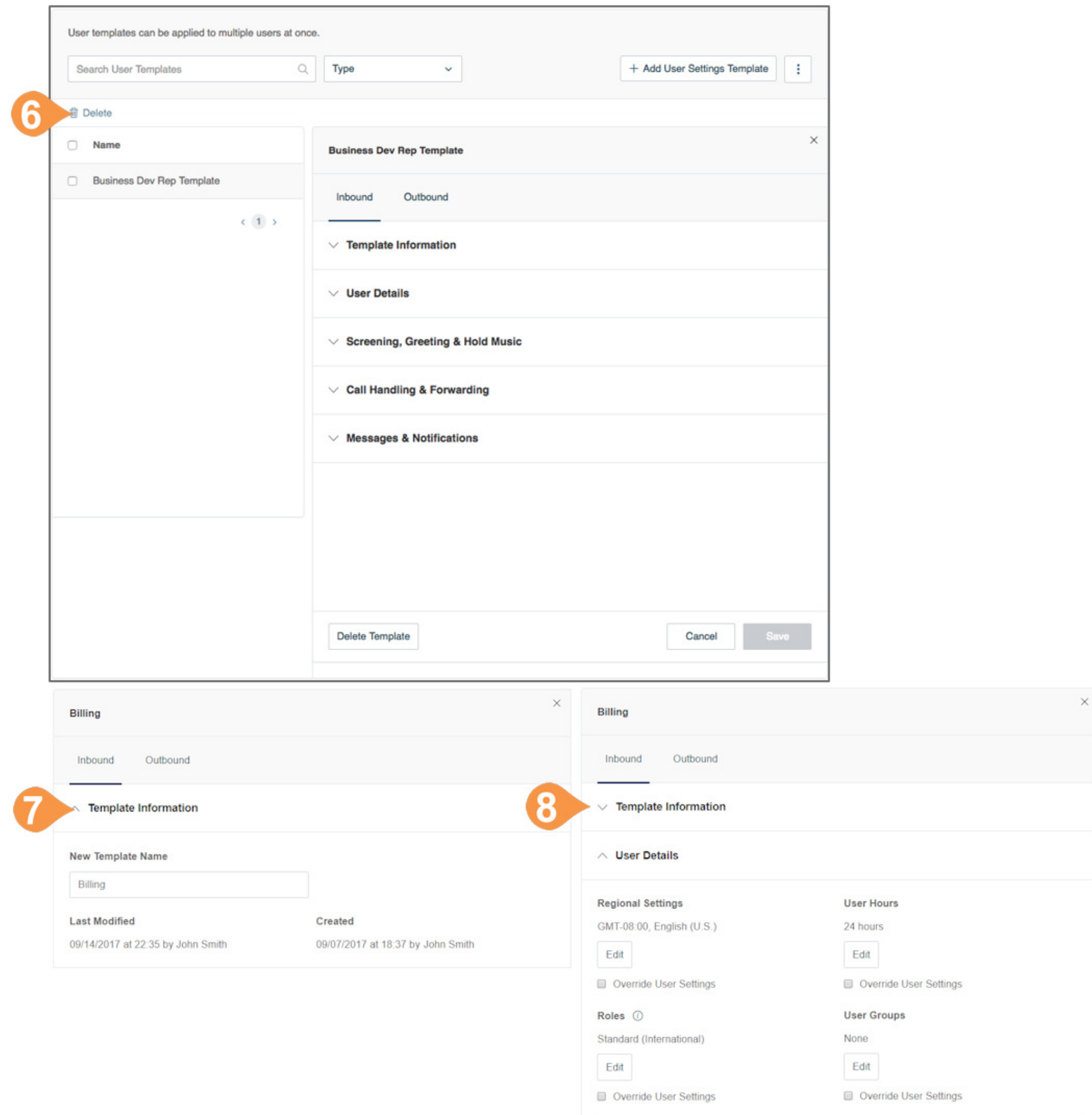
Office@Hand Templates will save you time and repetitive manual effort by streamlining your administrative routine. Create a template for all settings for a user and apply it to users as you need.

Create a Template for User Settings

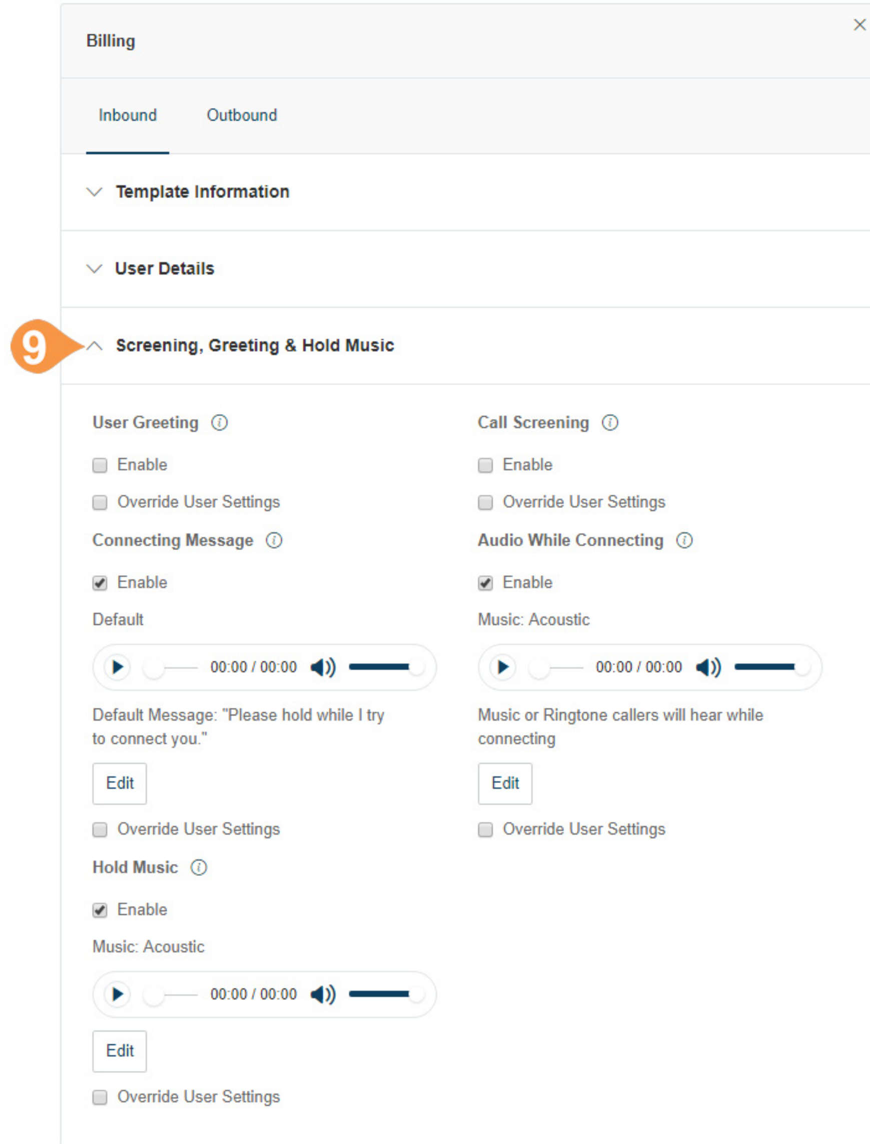
1. From the **Admin Portal**, click the **Users** tab.
2. Click **Templates.**
3. Click **Add Template.**
4. Enter a **New Template Name.**
5. Click **Save.**



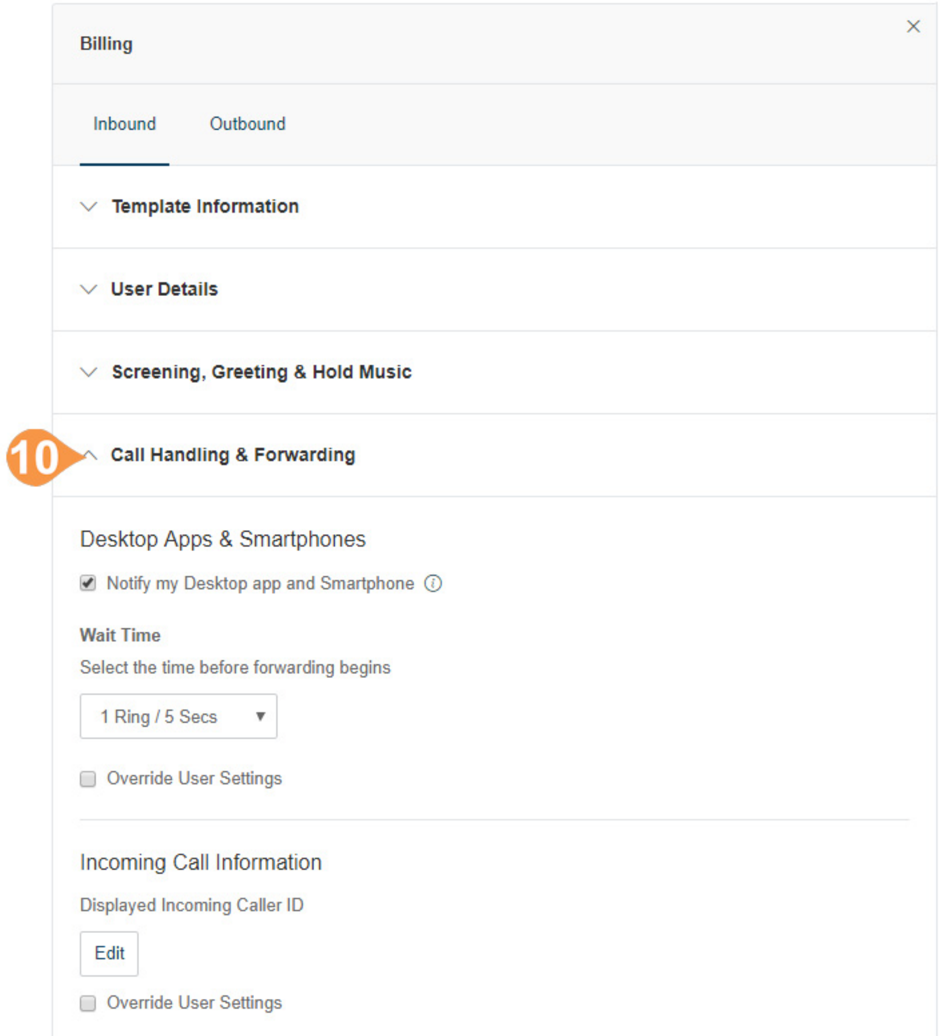
6. Select a template from the left pane. You see options you can set for this template in the right panel, grouped into categories of settings for Inbound and Outbound calling. For each group of settings, you can specify whether the settings override each users' settings by checking **Override User Settings**.
7. Configure **Template Information** settings.
   a. **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**: Specify regional settings for users such as timezone 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 which could be based on a job function.
   d. **User Groups**: Specify the user groups where the user is to have membership.
   e. **Emergency Address**: Provide a physical address for First Responders.
   f. **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.
   g. Low Bandwidth - gives you lower sound quality but ensures no interruptions during your conversation.



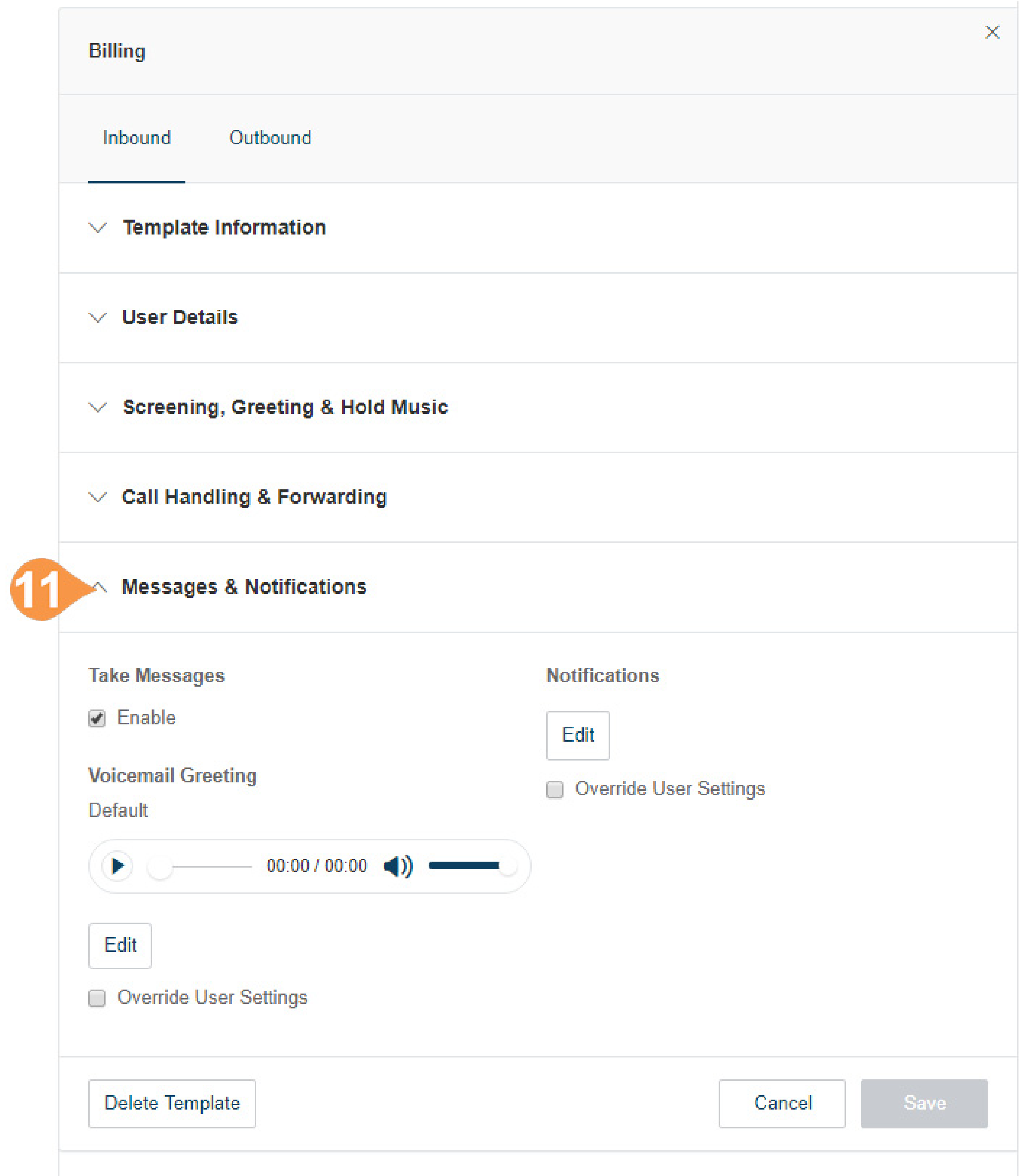
9. Configure **Screen, Greeting, and Hold Music** settings.
    a. **User Greeting:** Turn on this option when you want the system to answer the call with a recorded welcome message so callers know they've reached the right person. This is not a personal voicemail announcement.
    b. **Call Screening:** 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 Handling & Forwarding** > **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.



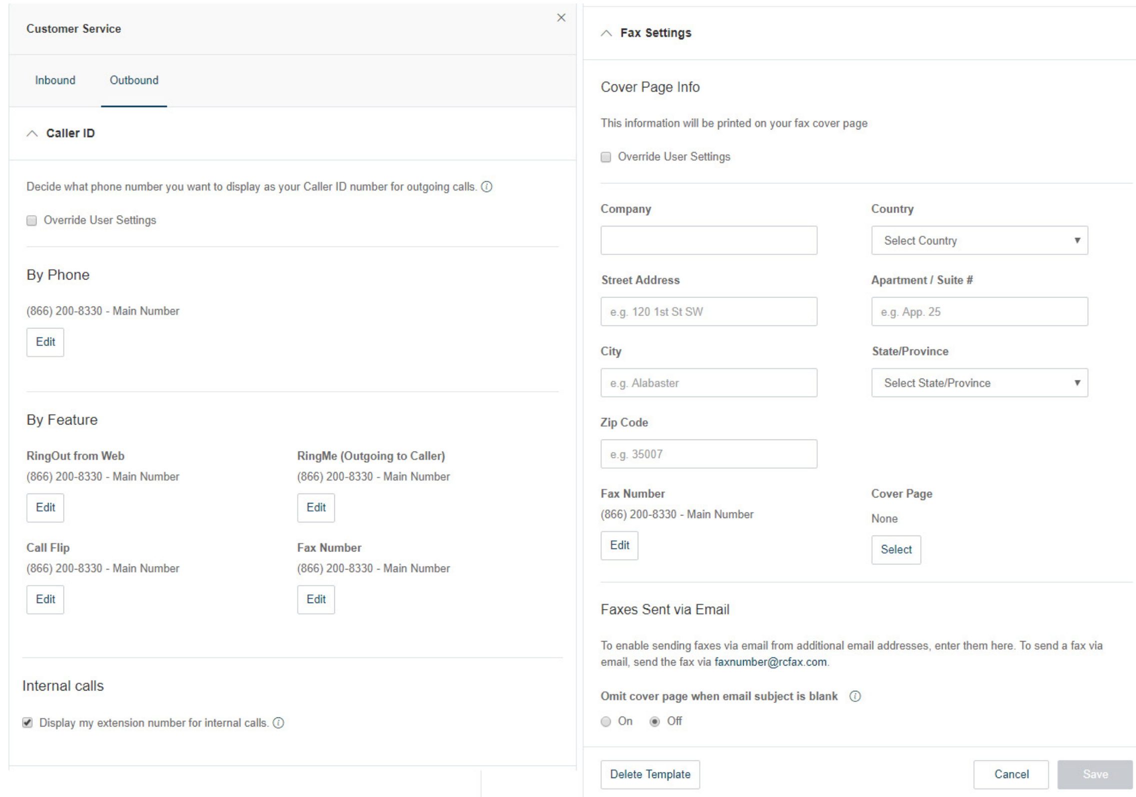
10. Configure **Call Handling and Forwarding** settings.
    a. **Desktop Apps & Smartphones**: Specify whether to notify your Desktop app(s) and smartphone(s) before forwarding the incoming call to your desk phones and forwarding numbers, and specify a wait time.
    b. **Incoming Call Information**: Specify display and announcements for incoming calls.
    c. **Outbound Caller ID**: Choose phone number to display as outbound caller ID for outgoing calls.
    d. **Outbound Fax**: Specify settings for sending outbound faxes, including cover page information, and settings for faxes sent by email. Configure **Messages and Notifications** Settings.



11. Configure **Messages and Notifications** settings.
    a. **Take Messages**: Allow or deny users to take voicemail messages; specify a default or custom voicemail greeting.
    b. **Notifications**: Choose how to be notified about voicemail messages missed calls, fax transmission results and received text messages.
    c. **Voicemail Greetings**: Specify a default voicemail greeting.

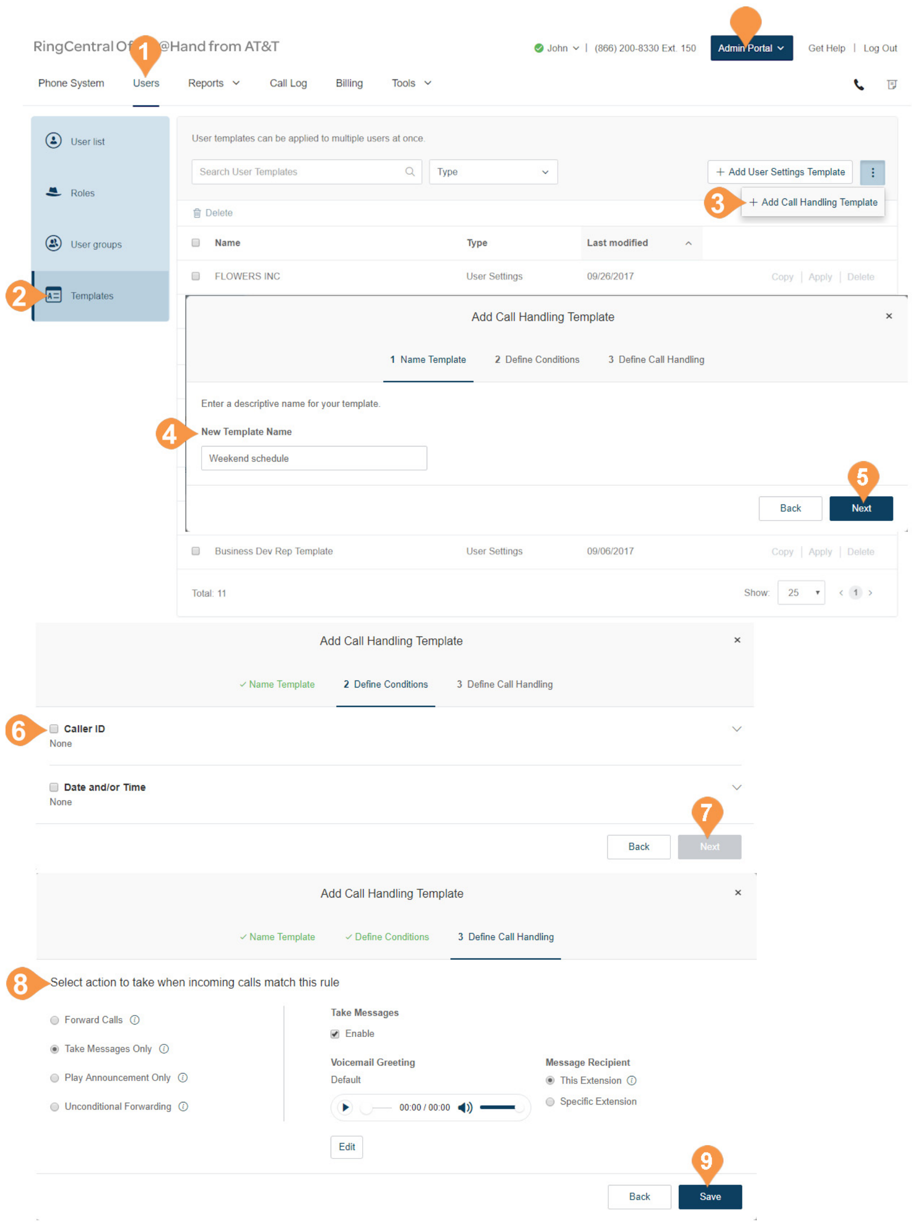


12. Click the **Outbound** tab to configure settings for outbound calls such as caller ID and fax settings.
    a. **Caller ID**: Specify caller ID settings by phone or by feature. If you select Toll-Free number or Blocked as your Default Caller ID for any of your endpoints/calling features, you can 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.
13. Click **Save**.



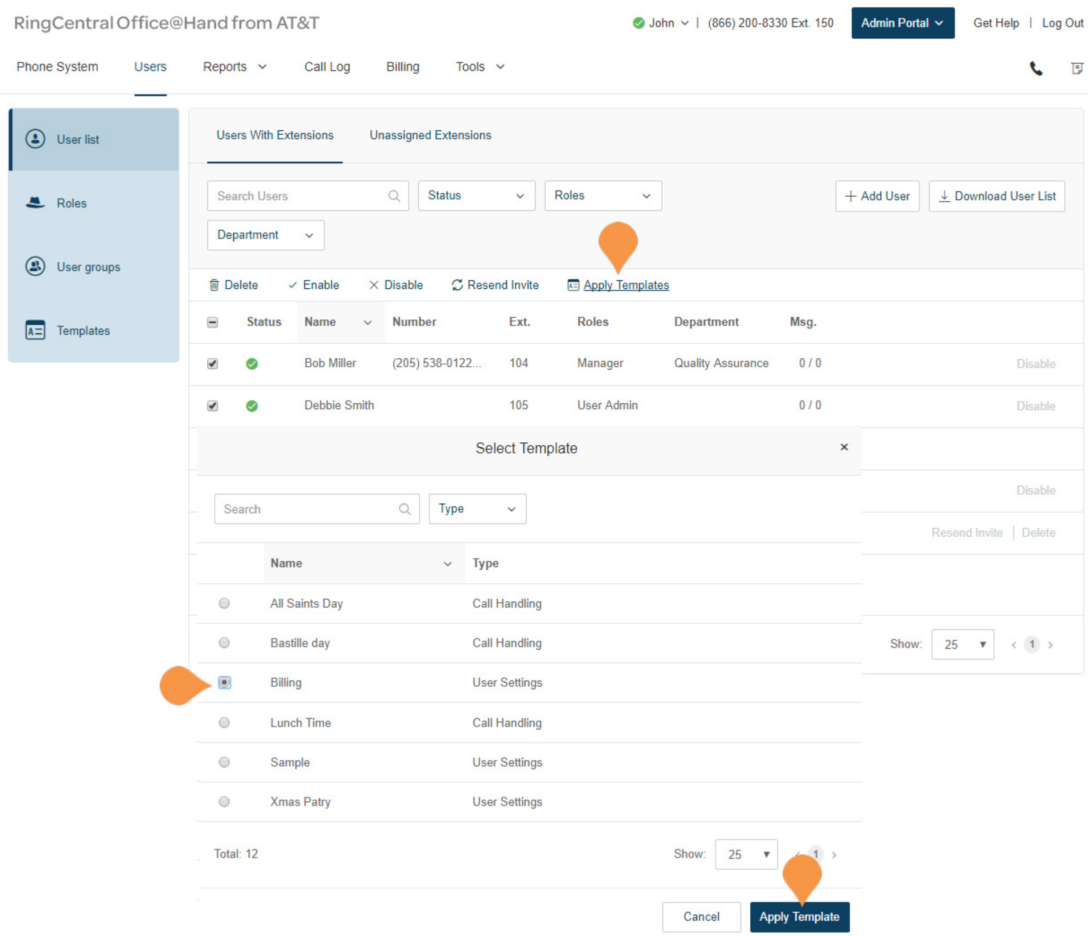
Create a Template for Call Handling Settings

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



Apply a Template to Users

1. From the **Admin Portal**, click the **Users** tab.
2. Select a number of users.
3. Click **Apply Templates**.
4. Select a template to apply.
5. Click **Apply Template**.
6. Click **Yes** 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.



Reports

Reports

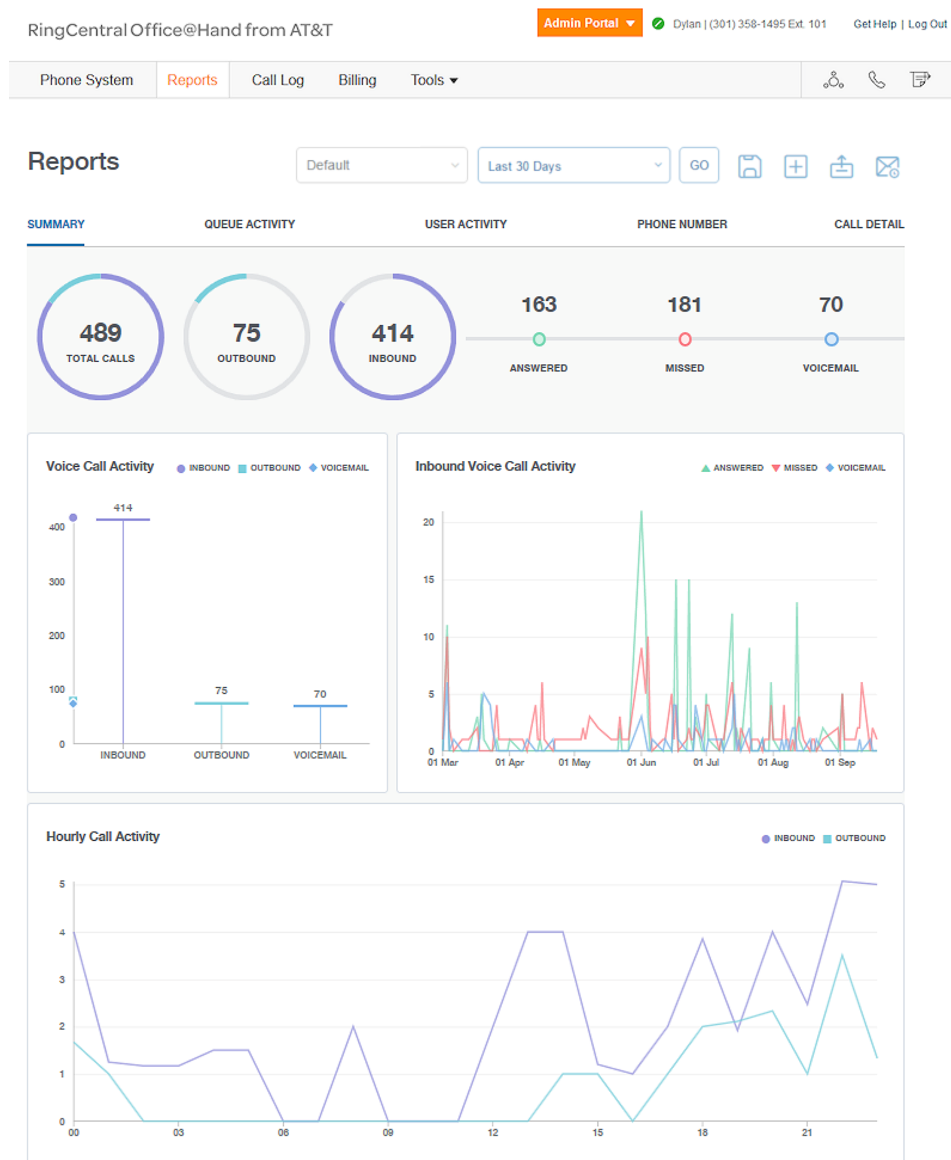
Office@Hand Reports helps admins and user group managers optimize the phone system by presenting usage analysis and trending metrics in an easy-to-read graphical format. With four separate views and many filtering options, you can target your report to reveal metrics to increase your business performance. The **Queue Activity**, **User Activity**, and **Phone Number** reports are visible to Account Administrators and Call Queue Managers. User Group managers have access to reports for only their group member's data.

The **Summary** report provides an overview of all call activity - Total, Outbound, Inbound, Answered, Missed, Voicemail, and Average Hourly Activity during a selected date range. The **Queue Activity** report, visible to Account Administrators and Call Queue Managers, presents a summary of Total Call Volume, Total Talk Time, Average Call Duration, Missed Calls, and Time to Answer for each call queue selected during a date range.

The **User Activity** report provides Total Call Volume, Average Number of Calls per User, Number of Inbound and Outbound Calls, Number of Call Per hour and Day, and Average Call Time for each selected user over a selected date range.

The **Phone Number** report provides (for Individual Numbers) the Total Call Count, the Average Calls per day, and the Average Call Duration for inbound calls. The **Call Detail** report (not available on mobile) provides details regarding calls made to a particular extension–call direction, extension name, queue name, dialed number and so on.

Reports can be saved as a custom report, or exported for later analysis as a an Excel file with tabs separating groups of related metrics. To export a report, select the data to be included in the report from the filter, and click the **Export** icon. Administrators can also view the report dashboard from the Office@Hand mobile app for iOS and Android. See the Office@Hand Mobile App Guide for more details.



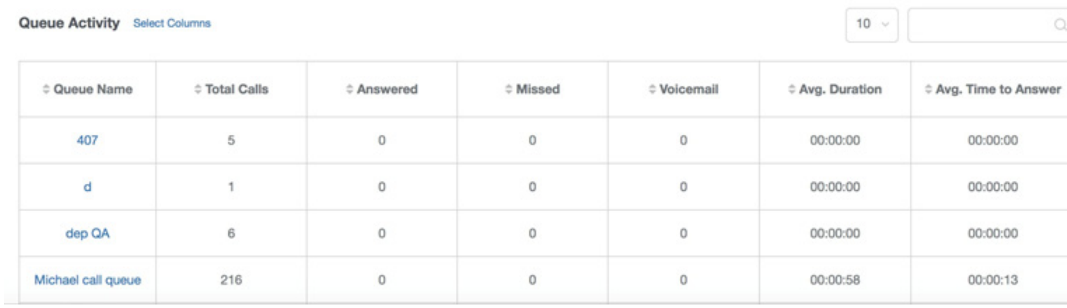
Select Customized Reporting Metrics

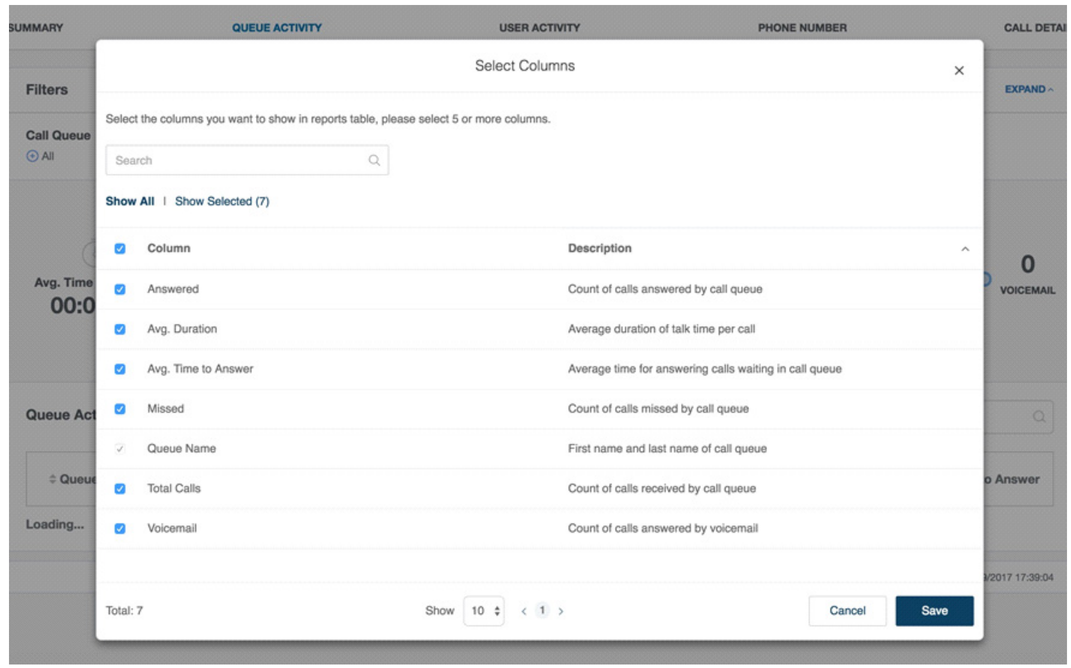
In the detail tabs (Queue Activity, User Activity, Phone Number, and Call Detail) you can customize the report metrics you want displayed in your table view by selecting which columns of data to display. By default all table columns are displayed.

To customize your reporting data, click the **Select Columns** button to open a multiple selection popup, and select from a list of available columns in table. You must select at least five columns for display before clicking **Save**.

The tables will now display your selected reporting metrics. You can retain your changes to the columns displayed by saving the current view. When you generate a report, the report data will also reflect the new table view.

See Generate and Export Reports.





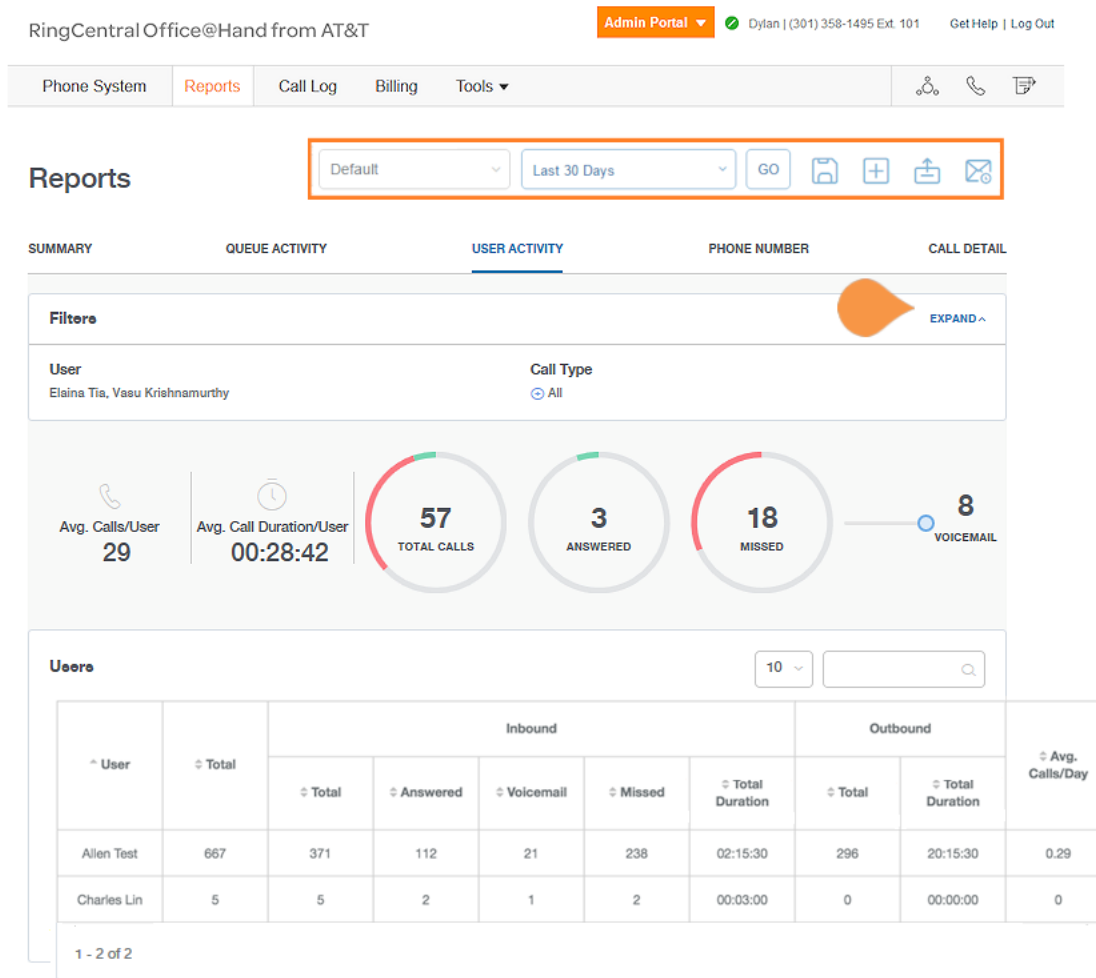
Generate and Export Reports

You can generate custom reports by settings filters that show the data you want. You can save Reports as a custom report, or export reports for later analysis.

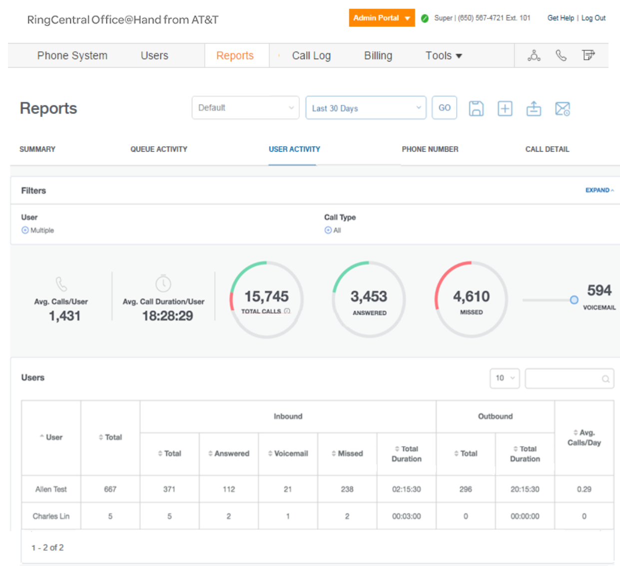
Create a custom report by setting the filters you want, then selecting **Go**. Specify a fixed number of days, or a custom date range. Date and time information comes from the logged in user's regional settings. In the detailed report screens, you can click **Expand** to set more filters such as Call Type. Select the filters, and click **Apply**.

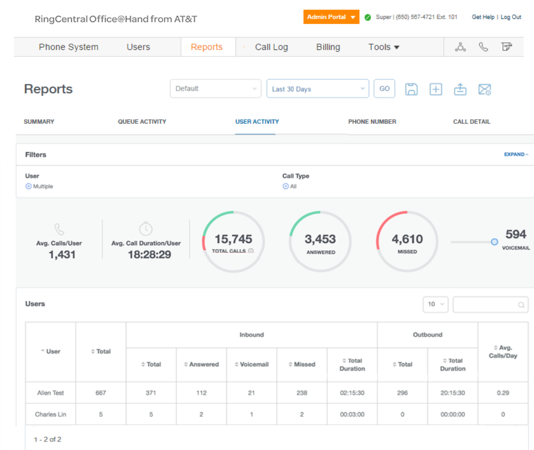
- To save your custom report for future viewing, select the **Add View** icon, and enter a name for the custom view. When you click **Save**, the view is added to the menu of available reports.
- To make changes to an existing report, select it from the menu, change the filters as needed, and click the **Save** icon.
- To export a report, select the report you want to export, click **Go**, and click the **Export icon**. The report is exported as a Microsoft Excel file. To learn more, click here.

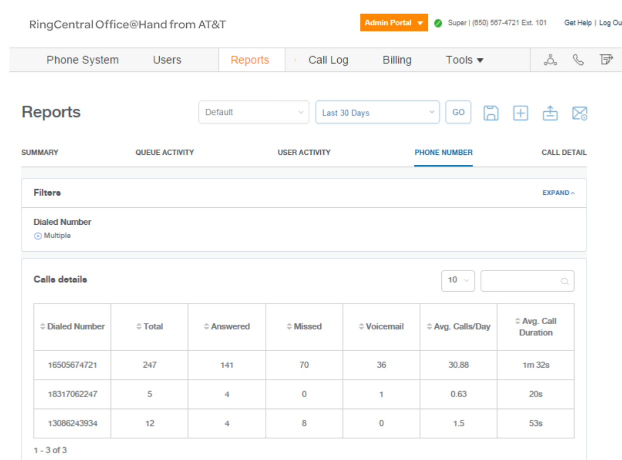
(See more reports on the following page.)

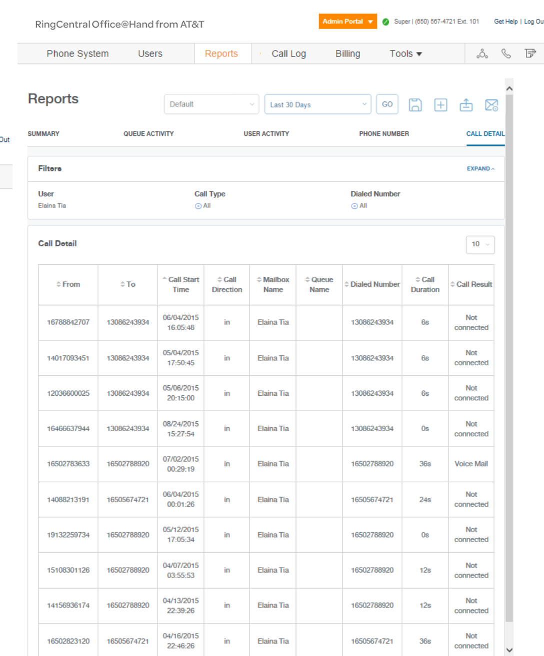


Reports for User Activity, Queue Activity, Phone Number, and Call Detail





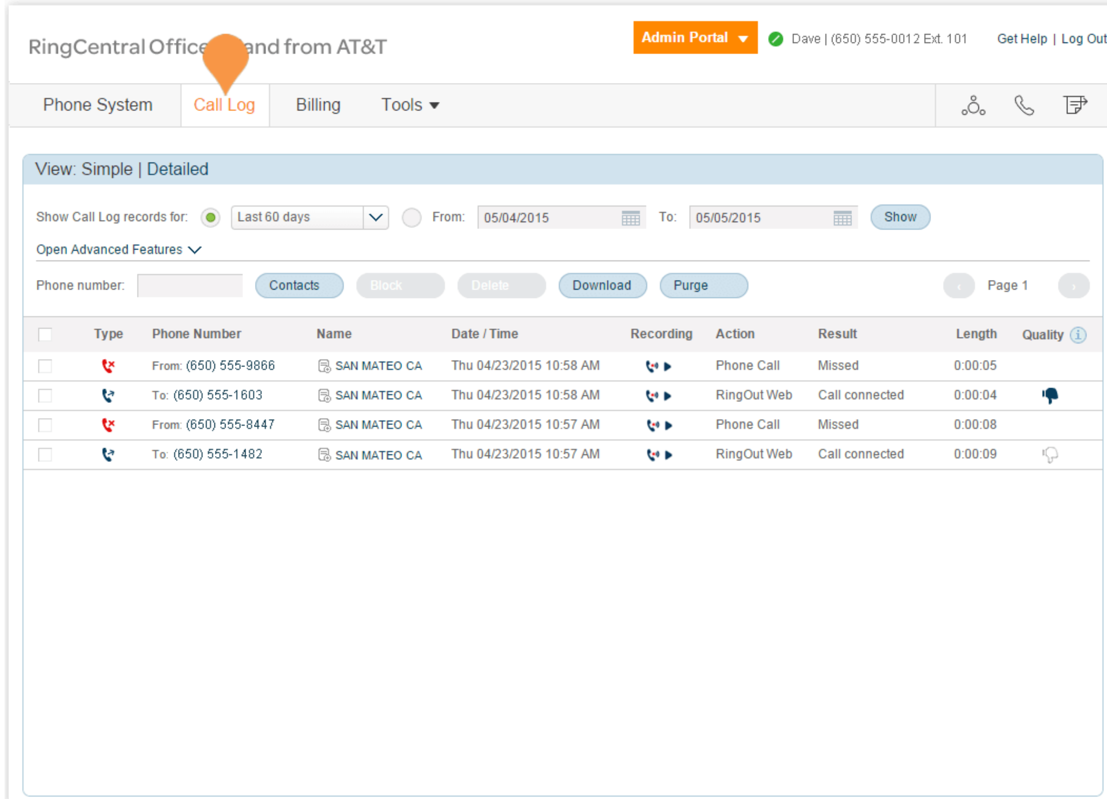




Call Log

Call Log

The Call Log provides reports on inbound and outbound calls and faxes for the company number and specified extensions. Select the time period, type of call (inbound or outbound), blocked calls, or recorded calls. You can have the call log delivered to an email address daily, weekly, or monthly on specified day.



In the **Type** column you will see icons for the following types of calls:

Inbound Call

Outbound Call

Missed Call

In the **Recording** column, you will see this icon if the call has been recorded. Hover over the icon to listen to the recording.

Listen to a call recording

Administrators can enable the bad call quality indicator in the RC Admin tool for a given account. After this feature is enabled, the administrator will be able to see the **Quality** column. In the Quality column you will see thumbs down icons for calls that were connected. Click the white thumbs down if you were not satisfied with the quality of a call.

Click to mark as a bad call

Marked as a bad call

Billing

Billing

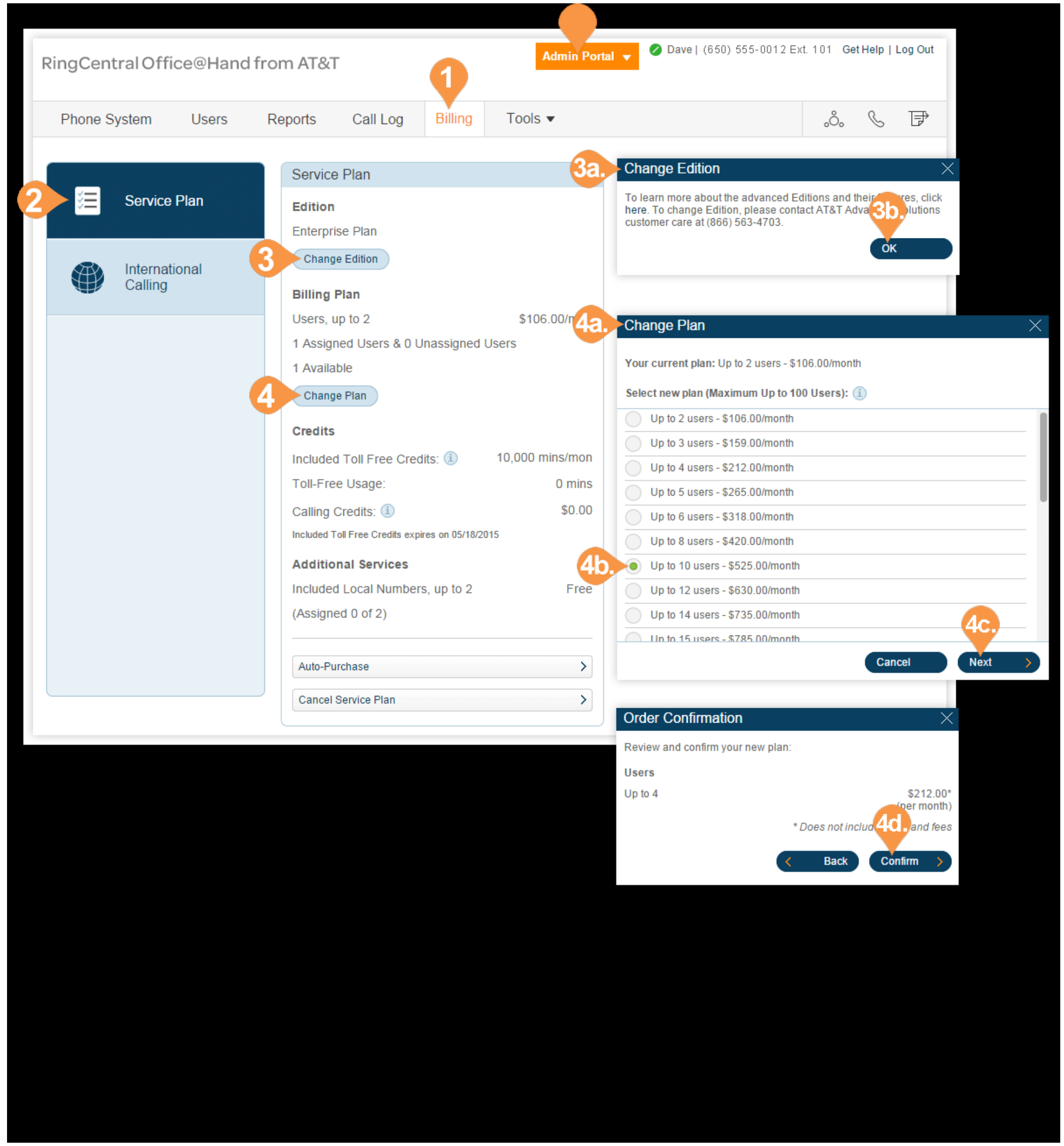
The Billing tab houses menus for managing your Service Plan and International Calling. View and edit your service plan, payment information, and international calling plans here.

Note: Billing is an Admin function only. This option will not be available to standard users.

Service Plan

To view or change your service plan:

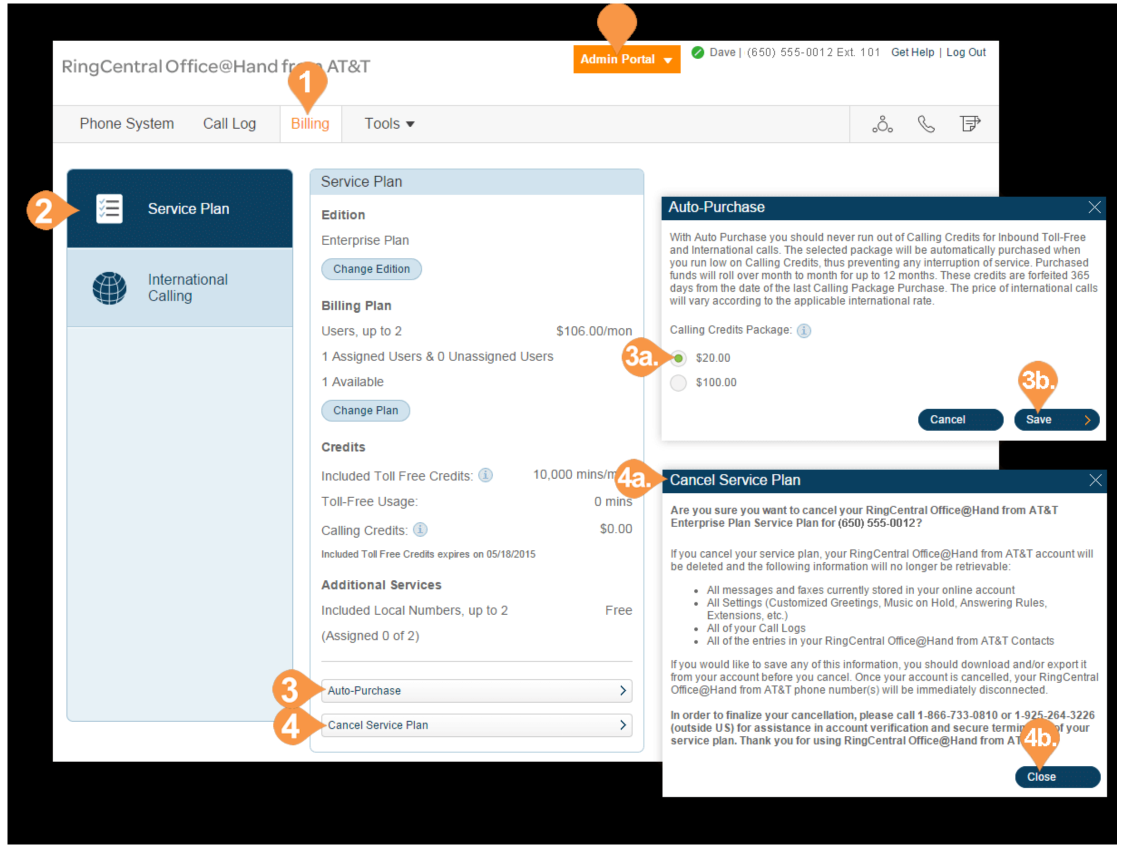
1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Service Plan** to view your plan details.
3. Click **Change Edition**.
   a. Follow the instructions on the pop-up to change editions or learn more about different editions.
   b. Click **OK**.
4. Click **Change Billing Cycle**.
   a. View options for monthly or yearly subscriptions.
   b. Select the button next to the plan you'd like.
   c. Click **Next**.
   d. Review your order and click **Confirm**.



Other Service Plan Options

To view options for billing history and auto-purchase:

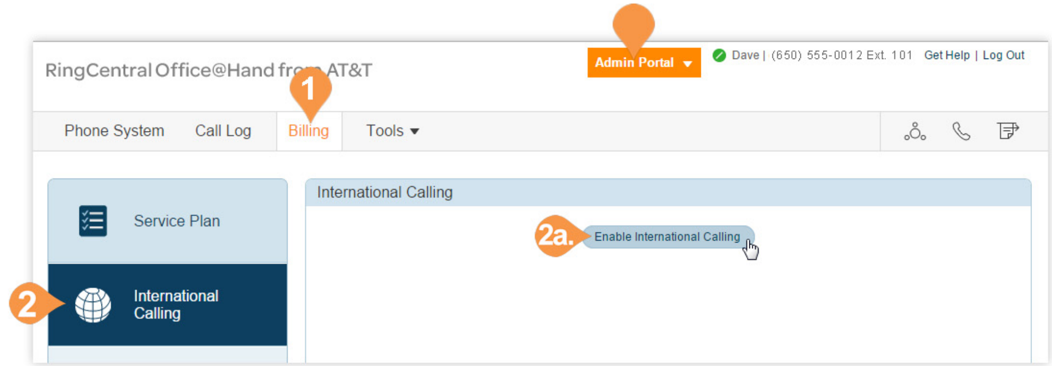
1. From the **Admin Portal**, select the **Billing** tab.
2. Click **Service Plan**.
3. Click **Auto-Purchase**.
   a. Select the button next to the **Calling Credits Package** you wish to purchase.
   b. Click **Save**.
4. Click **Cancel Service Plan.**
   a. If you would like to cancel your service plan, follow the instructions on the pop-up.
   b. Click **Close**.

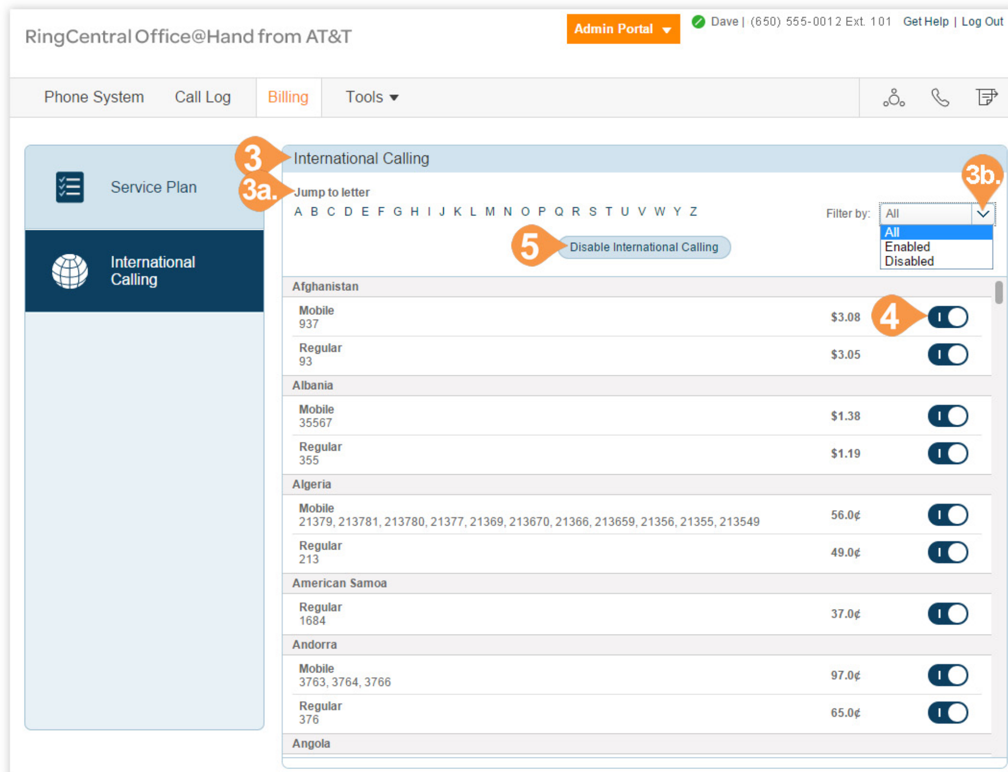


International Calling

To enable, disable, and view international calling rates:

1. From the **Admin Portal**, select the **Billing** tab.
2. Click **International Calling**.
   a. If International Calling is not enabled, click **Enable International Calling** to enable it.
3. View the countries international calling is available to and the price for each country.
   a. Use the alphabet at the top of the screen to jump to a list of countries that start with a specific letter.
   b. Sort by Countries that are enabled or disabled by using the drop-down menu.
4. Turn calling to a specific country on or off by clicking the blue switch to the right of that country.
5. Disable international calling completely by clicking **Disable International Calling**.



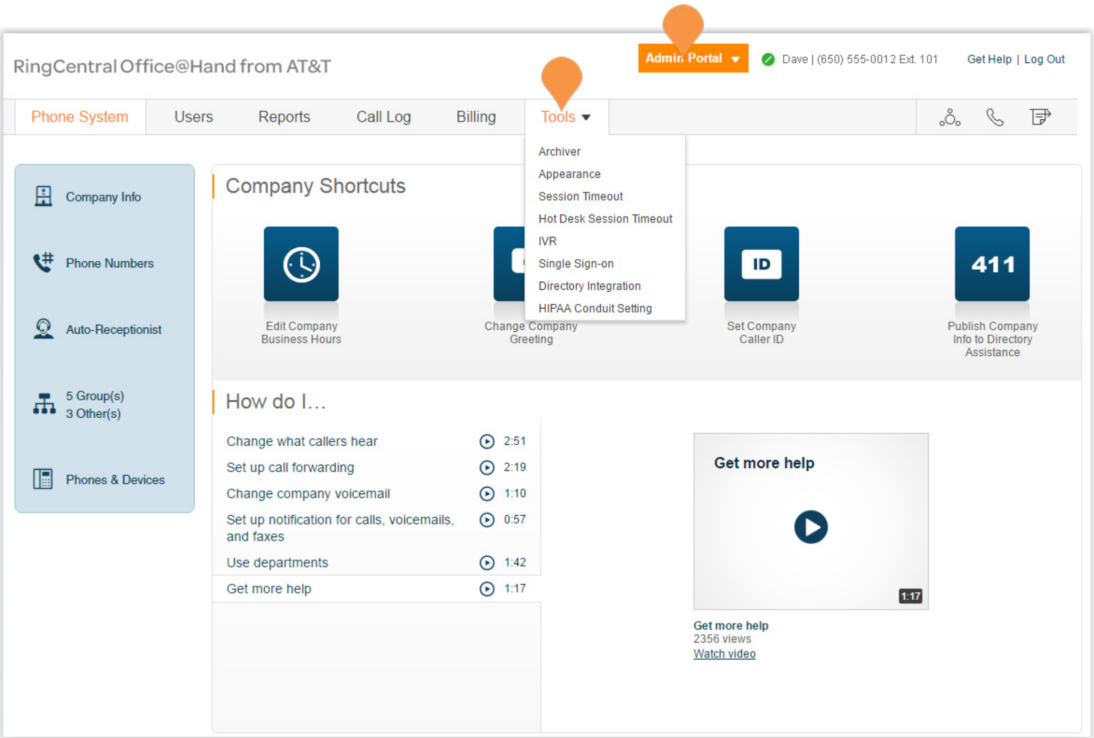


Tools Menu

Tools

In the Admin Portal, the Tools tab houses many important features for your company's phone system. When you click on the Tools tab, a menu will appear with the following items:

- Archiver
- Appearance
- Session Timeout
- Hot Desk Session Timeout
- Account Linking
- Single Sign-On
- Directory Integration
- HIPAA Conduct Setting



Archiver

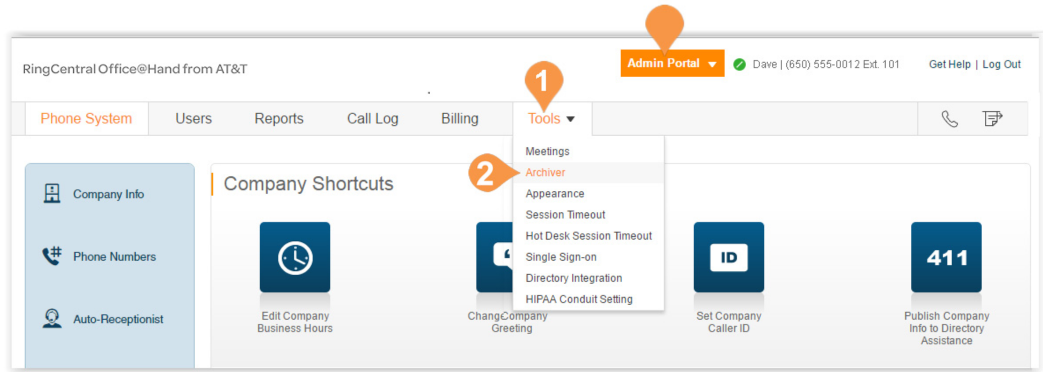
Office@Hand Archiver makes archiving important communications data simple and convenient through the seamless integration of SFTP, or Dropbox or Google Drive cloud storage with your Office@Hand service.

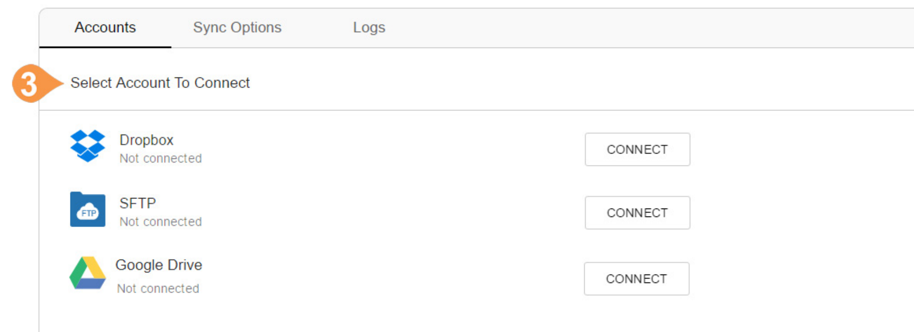
With Office@Hand Archiver, you can securely save your messages and recorded calls automatically and easily search the stored data at any time from within your account to quickly retrieve the records you want.

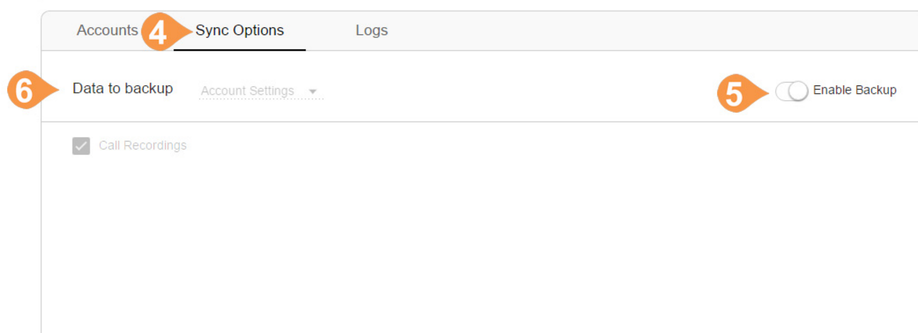
Configure Office@Hand Archiver

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Archiver** and log in to the tool with your Office@Hand or Salesforce credentials.
3. The Accounts tab displays the connection status of your accounts. Click **Connect** and enter the credentials to connect Office@Hand to your Dropbox, Google Drive, or SFTP account.
4. Click **Sync Options**.
5. When connected to an account, you can enable or disable data backup from Office@Hand to the account by selecting **Enable Backup**.

   Office@Hand Archiver will run the job on an hourly basis and archive to Dropbox, Google Drive, or SFTP all of the extensions' call recordings generated within the hour before last Archiver job run.
6. 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.





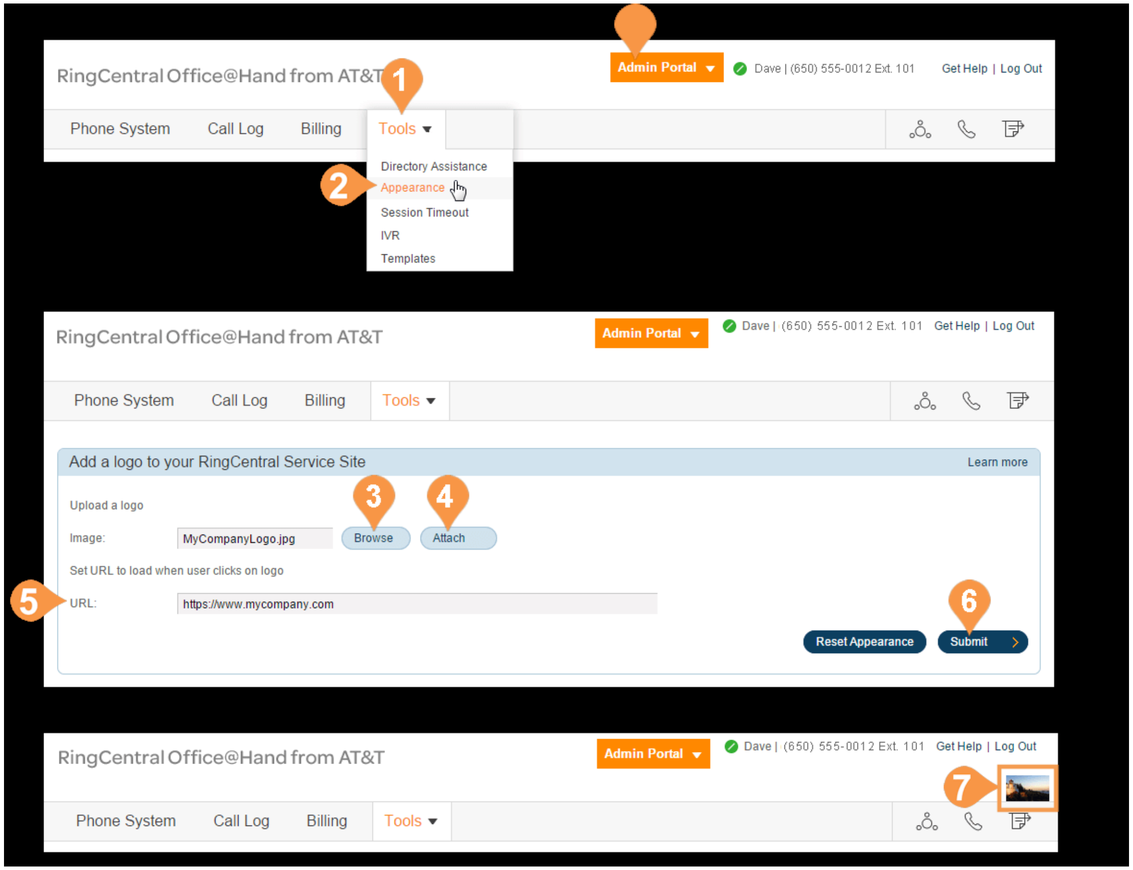


Appearance

Add your company logo to your Office@Hand online account for a custom look. Take one step further and link your company logo to your company's website for easy navigation.

To upload and link an image:

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Appearance**.
3. Click **Browse** to browse your computer for an image to upload and select the file you want to use.
4. Click **Attach**.
5. Enter the URL that will be opened when a user clicks on your image.
6. Click **Submit**.
7. View your logo in the upper right corner of your online account and test the URL by clicking on the image.

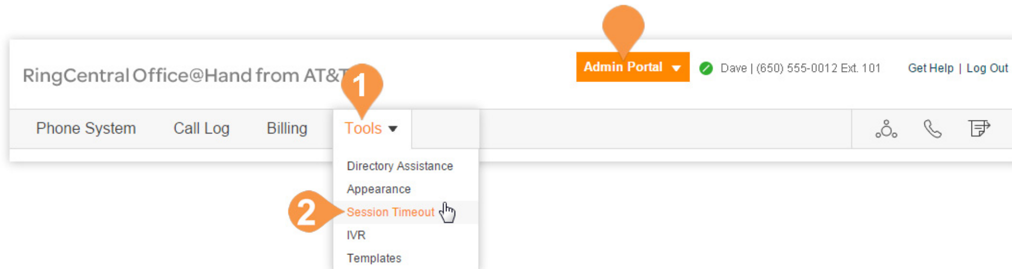


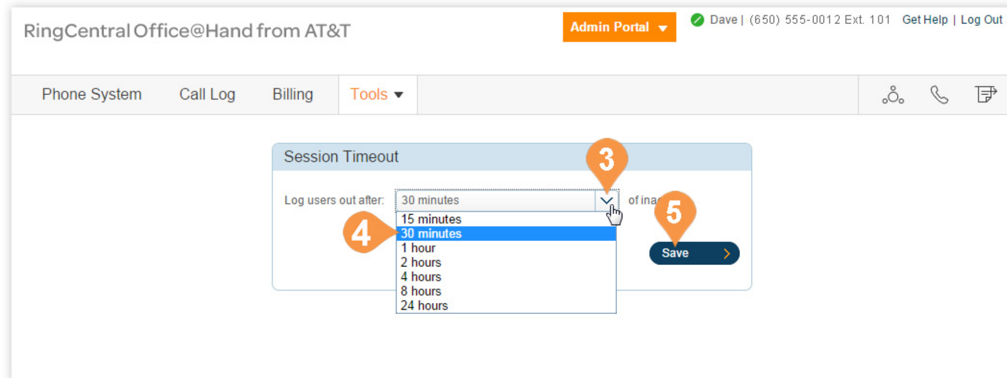
Session Timeout

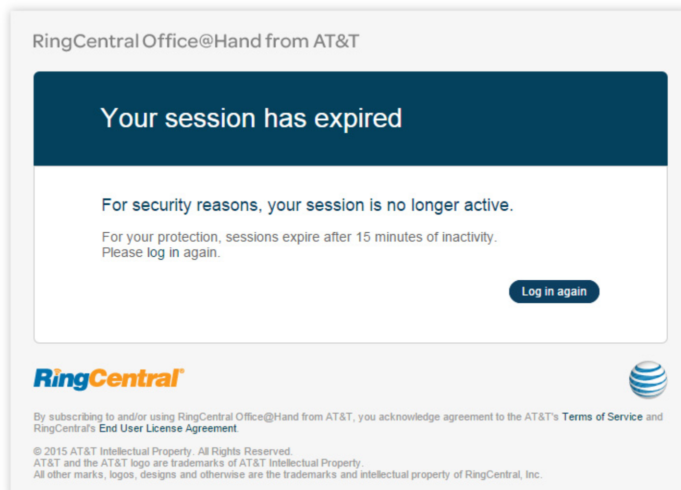
Configure a session timeout for all users on your account. If a user is inactive for a certain period of time, a warning message will appear notifying the user that the session is about to expire. The user can click OK to keep their session alive. If a user does not click OK before the time runs out,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

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

1. From the **Admin Portal**, select the **Tools** tab.
2. Click **Session Timeout**.
3. Click the drop-down to view a list of time intervals.
4. Select the time interval you would like to use.
5. Click **Save**.







Account Federation

Account Federation (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.

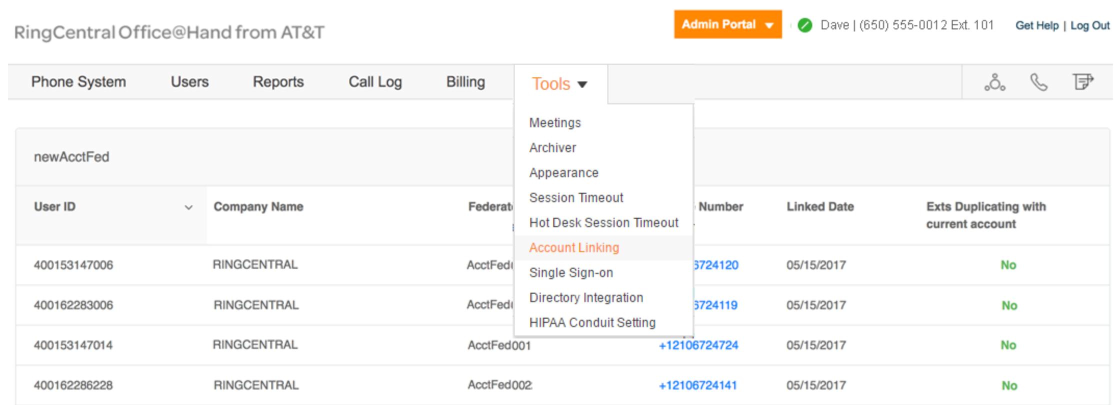
Before setting up Account Federation:

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 extensions number of the linked account for you by applying a template.
4. When the Account Federation setup is complete all the account users can find one another across accounts on all endpoints.

Setting up Account Federation

Account Federation provides the administrator a list of linked accounts. To access Account Federation:

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Account Linking**.
3. Your list of linked accounts is displayed. **Federated Name** helps differentiate one account from another.

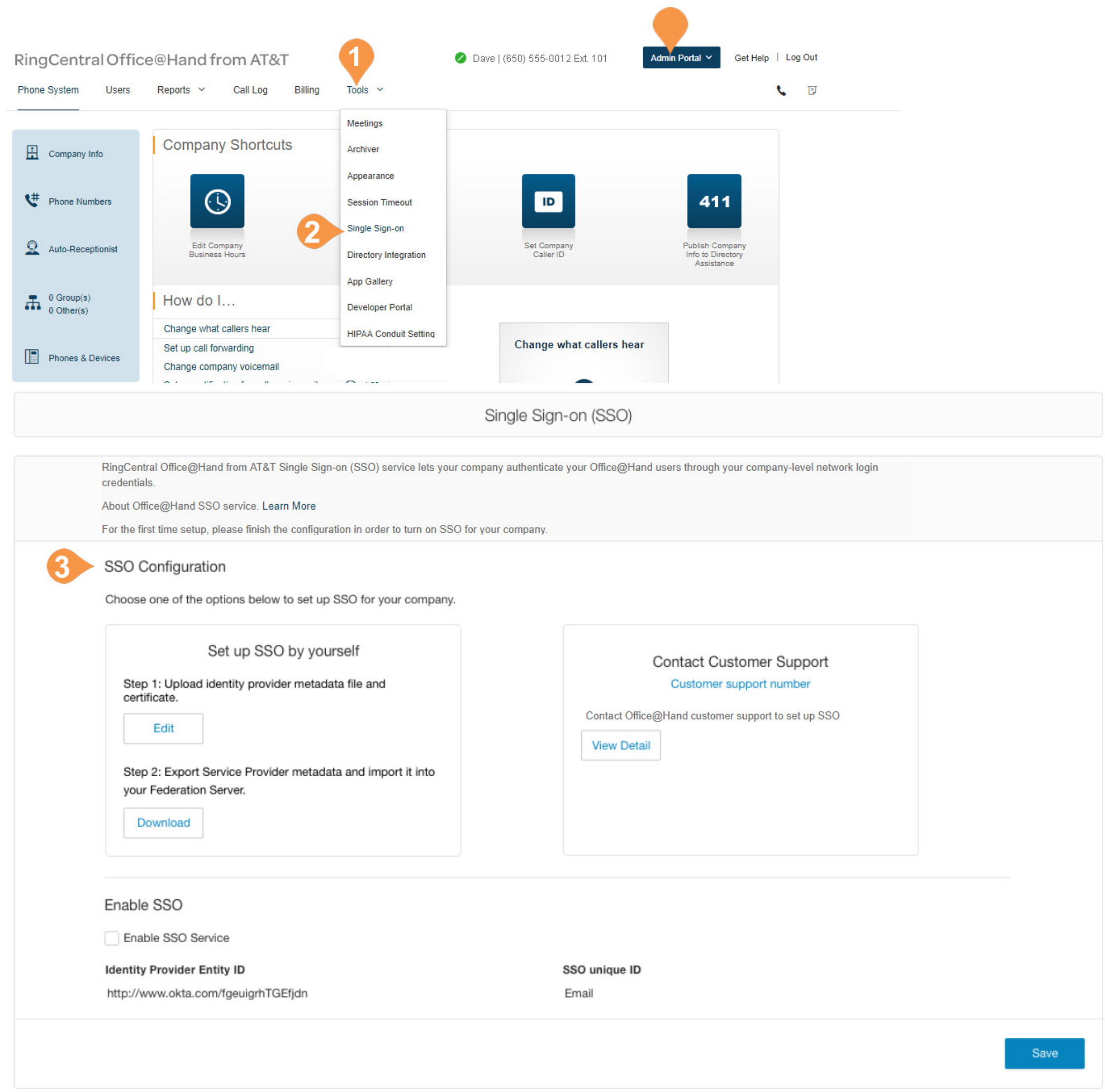


Single Sign-on*

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

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **Single Sign-on**.
3. 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 Office@Hand Customer Support to configure the Service Provider (SP) settings. Click the **View Detail** link, and perform the steps in Contact Support to Enable SSO.

*Available for Premium and Enterprise users only.

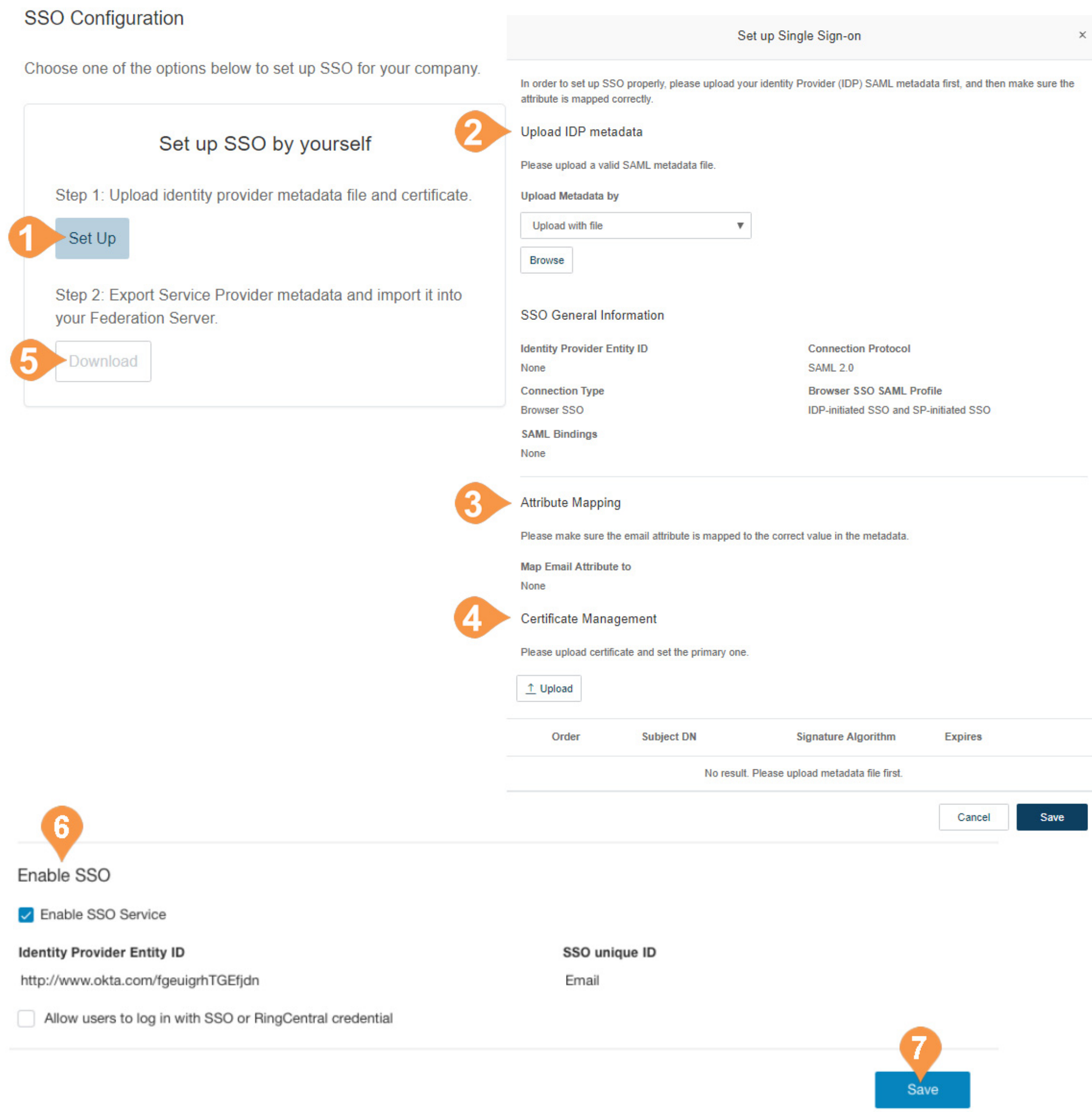


Set up Single Sign-On by Yourself

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. Upload the Identity Provider metadata from either a local file or an URL from your IdP. If the IDP entity ID has already been used by another account, you need to contact support for manually configuration.

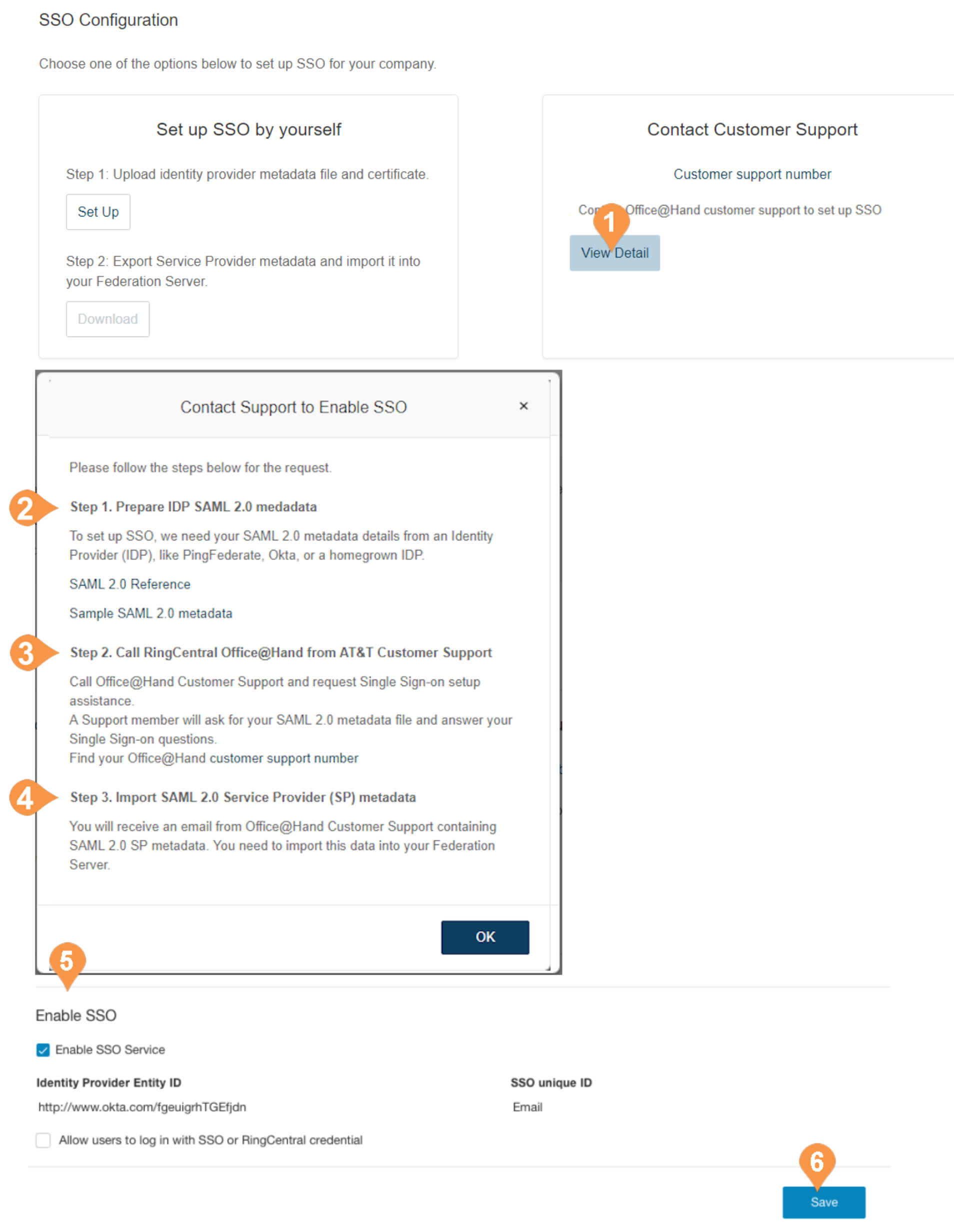
   Once uploaded, the information will be parsed from the metadata and displayed automatically.
3. Select the attribute in your metadata which should be mapped to email on RingCentral. The **Map Email Attribute To** menu lists all the attributes parsed from the IdP metadata.
4. If the metadata already contains the certificate information, it will show in the list. Otherwise, add the certificates manually. You can add multiple certificates, but only the ones ordered as Primary and Secondary certificates will be used. Click **Save**.
5. Click **Download** to export the Service Provider metadata and import it into your Federation Server to complete the configuration.
6. Check **Enable SSO Service**.
7. Click **Save**.



Contact Support to Enable SSO

This section describes how you prepare the request, and contact RingCentral Office@Hand from AT&T Customer Support to configure the Service Provider (SP) settings required to enable SSO on your IDP server:

1. In the Contact Customer Support box click the **View Detail** link, and perform the steps as described.
2. Get your SAML 2.0 metadata details from your Identity Provider (IDP), such as PingFederate, Okta, or a homegrown IdP.
3. Click **Office@Hand customer support number** and call support to request Single Sign-on setup assistance. A support member will ask for your SAML 2.0 metadata file and answer your Single Sign-On questions.
4. You will receive an email from RingCentral containing your SAML 2.0 SP metadata. Import the metadata into your IdP server to complete the configuration on your IdP.
5. Check **Enable SSO Service.**
6. Click **Save.**



Directory Integration

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

Active Directory

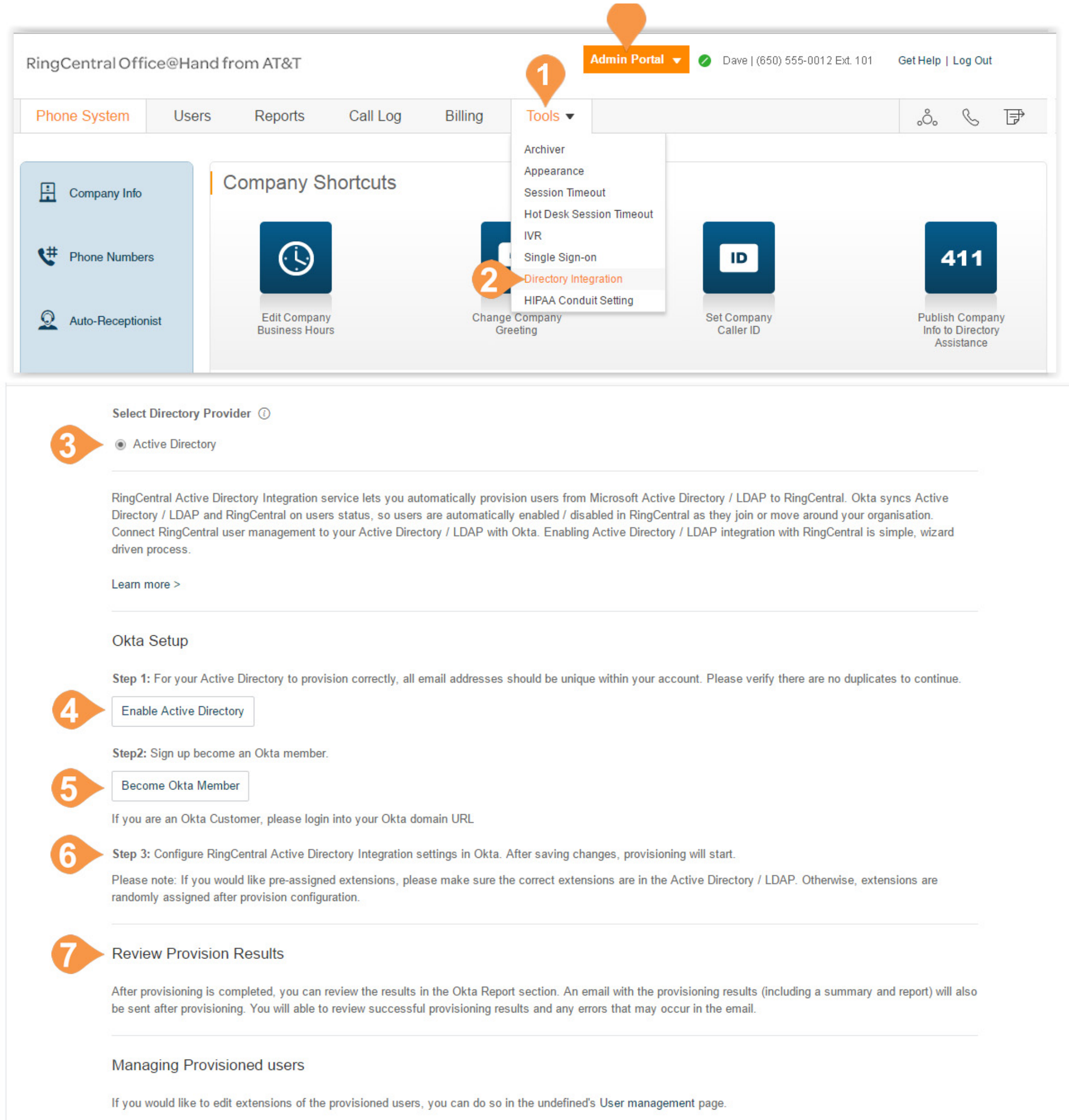
Office@Hand integrates with Microsoft Active Directory to let you automatically provision users from Active Directory to Office@Hand.

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

For more details on integrating Office@Hand with Active Directory, click here for the Active Directory Implementation Guide.

To set up the RingCentral integration service:

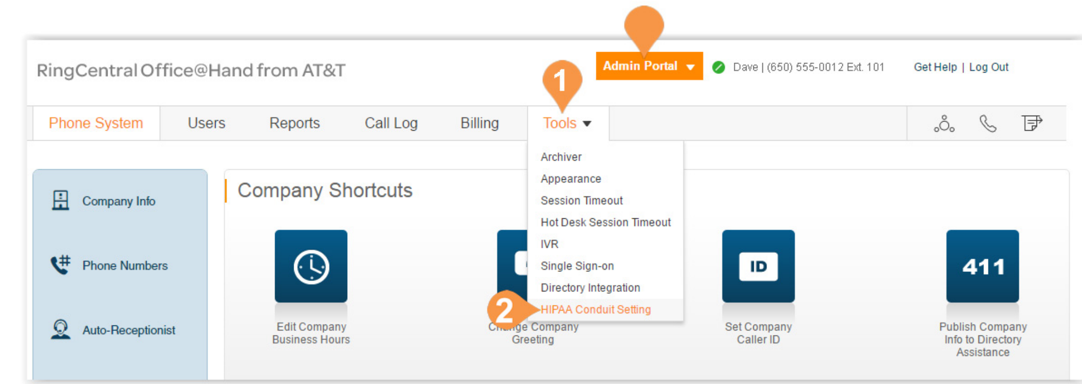
1. From the Admin Portal, click the Tools tab.
2. Click Directory Integration.
3. Select Active Directory.
4. Click Enable Active Directory.
5. If you are not already an Okta member, sign up for Okta by selecting Become an Okta member.
6. Configure in Okta the settings for integration with Active Directory, and save the settings in Okta. The provisioning process starts.
7. Review the provisioning results. You will receive an email containing the provisioning results, including a summary and report. If required, edit the extensions of provisioned users in User Management in the Admin Portal.

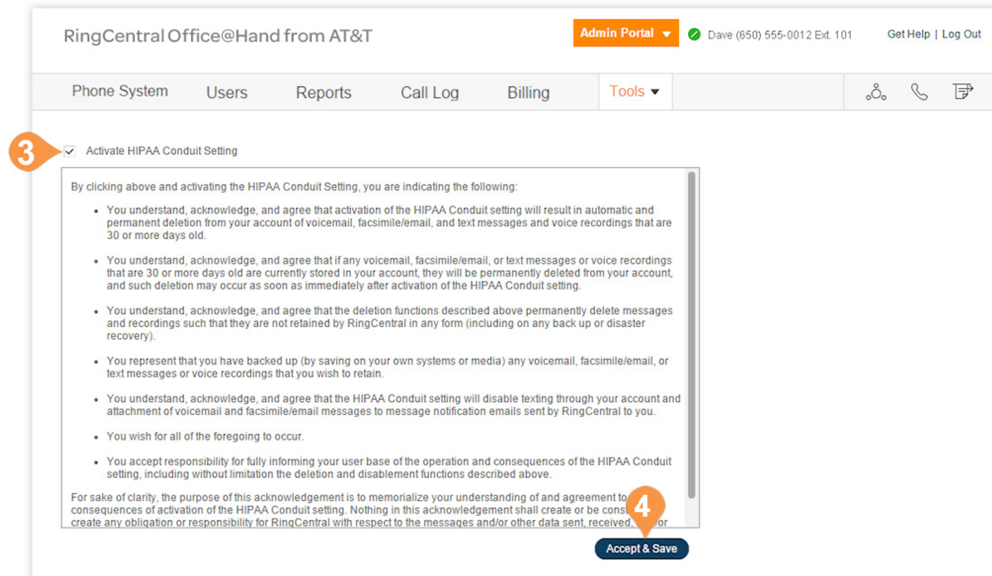


HIPAA Conduit Setting

Office@Hand's HIPAA-compliant solution ensures that customer calls and messages are secure with encryption in transit and at rest, along with other features, protecting patient data and guarding against unauthorized access to protected health information.

1. From the **Admin Portal**, click the **Tools** tab.
2. Click **HIPAA Conduit Setting**.
3. Check the box next to **Activate HIPAA Conduit Setting**.
4. Click **Accept & Save**. Once activated the following occurs:
   - Automatic forwarding of messages to email as an attachment is disabled.
   - Business SMS is disabled from Office@Hand mobile apps and desktop apps.
   - Automatically delete faxes, voicemails, SMS messages and voice recordings after 30 days.





In-Product Messaging

In-product messaging provides administrators with the ability to deliver relevant, targeted information to users about their Office@Hand phone service, including product features and benefits. Uses could include:

- Communicating availability of new releases
- Displaying a persistent message with ability to provide more details
- Ability to create campaigns with selective user control of displays
- Editions, release versions, and expiration dates
- Announcement at login
- A “leaderboard” message at the top of selected pages

Access In-Product Messaging by logging into the Admin web.

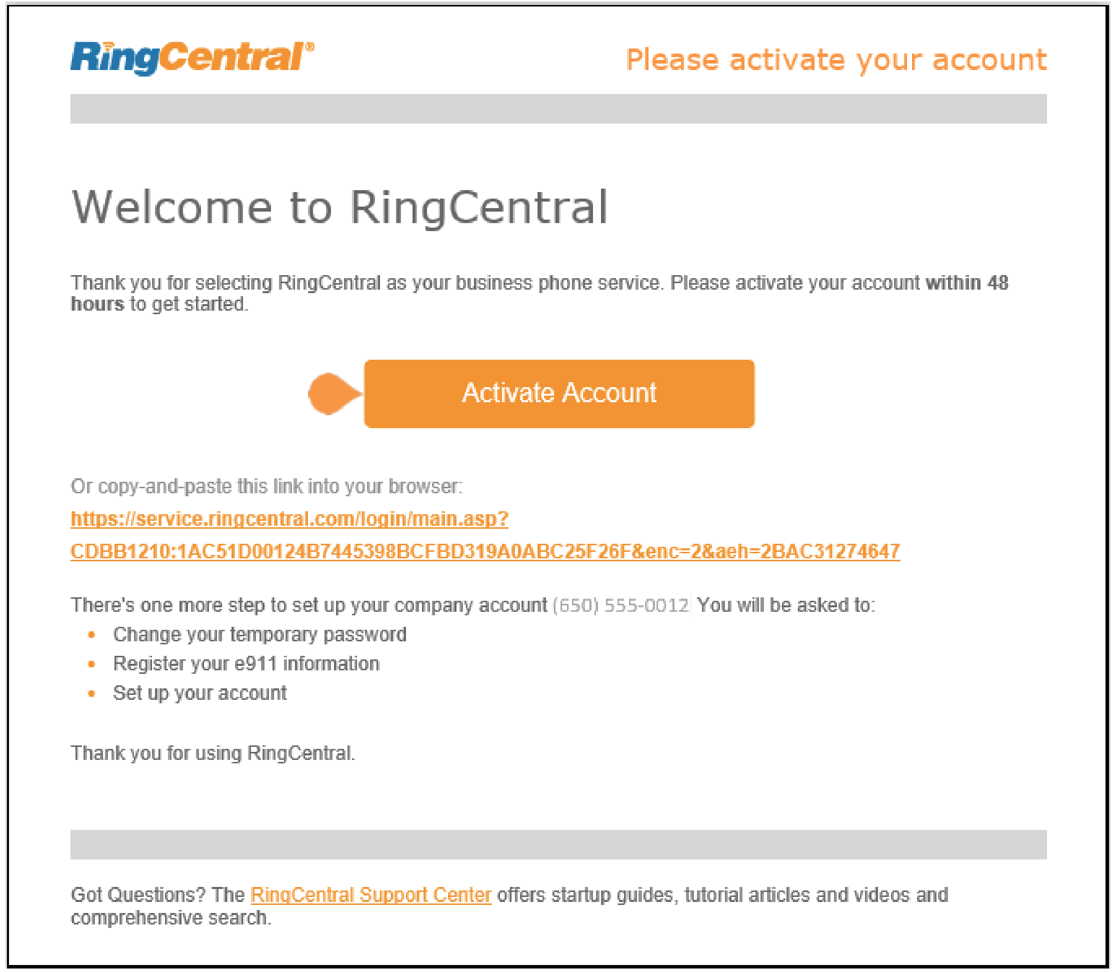
Appendix A: Express Setup for Admins

Welcome to RingCentral

Welcome to the RingCentral business phone system! Once you have purchased the system, you'll receive an email to activate.

If this is your first login, it will take about 25 minutes to initially set up your account. As the administrator you'll be able to add users during the Express Setup or after you complete these steps. You will set up user profiles, set the company greeting, operator extension, and My Info profile. You'll also verify your regional setting, provide emergency calling location, and setup how you would like phone calls to be routed.
Note: *If you leave the Express Setup without finishing, the changes you have made might not be saved.*

You can learn more about user features through Knowledgebase articles and the RingCentral Office Admin Guide.



Activate Your Account

You will receive a Welcome Email after you have purchased a RingCentral system.

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 **Activate Account**
   - Copy the link into your browser

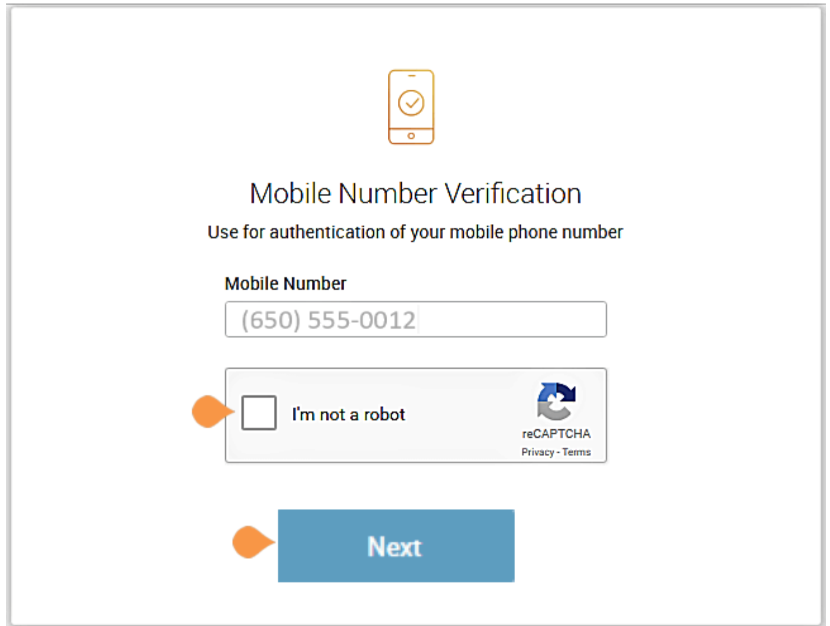
The setup instructions continue on the following page.

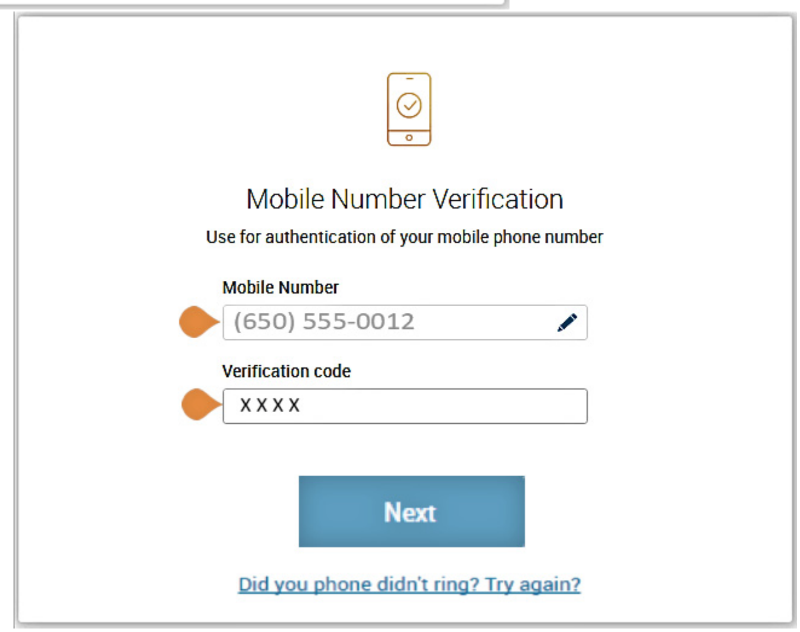
Your Account Security

After clicking **Activate Account**, authentication begins with a mobile app verification.

1. Click the **I'm not a robot** box, then **Next**.

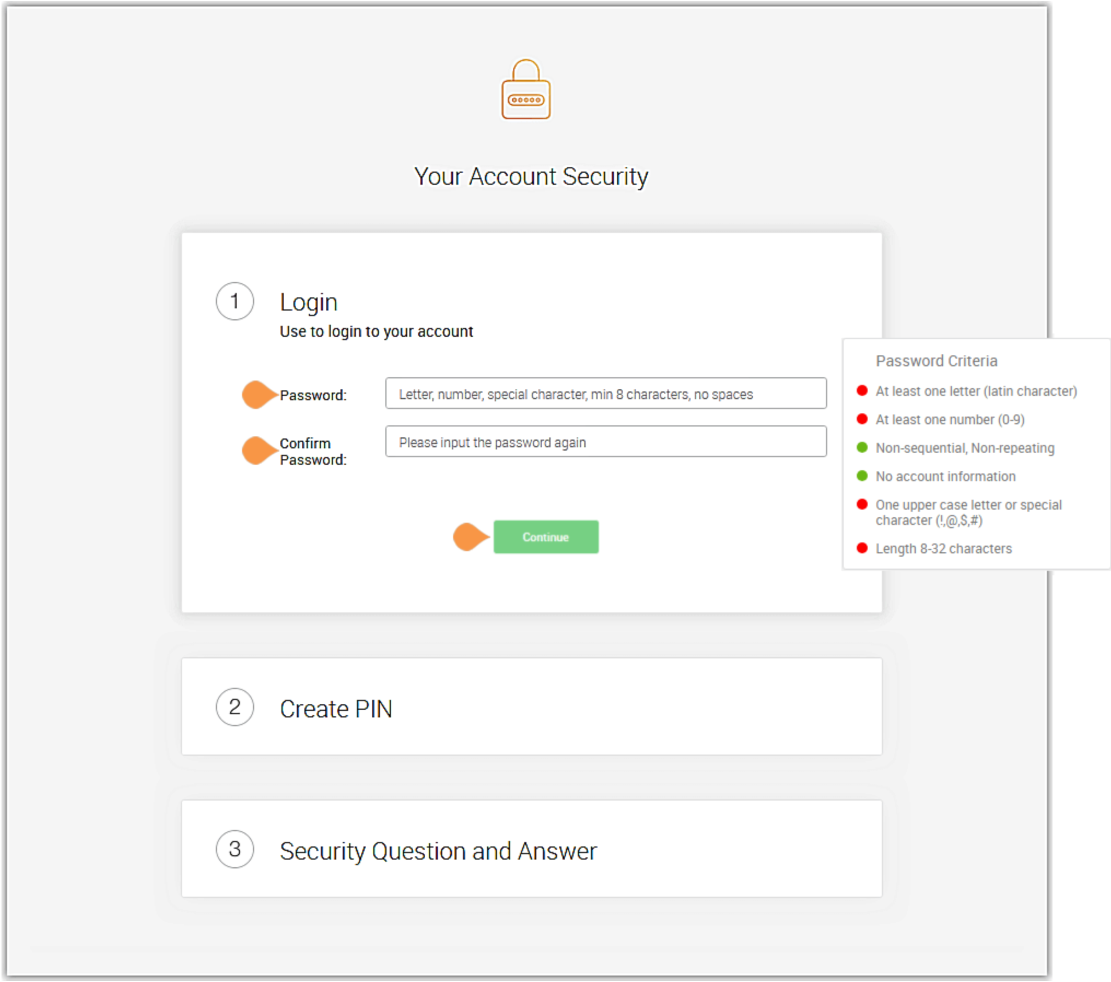
   A message informs you that you'll be receiving a phone call providing you with a verification code.
2. Enter the verification code.
3. Click **Next**.





A window opens for you to enter three account security settings:

- A password
- A PIN (Personal Identification Number)
- A Security Question and Answer



Create Your Password

Passwords and Security Questions on your online account maintain your account's confidentiality and privacy. The **PIN** is used to verify the User's identity when checking voicemail. The **Security Question and Answer** is requested by the RingCentral agent 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, your Express Setup will have different setup options. For information about setting up and using Google-tagged accounts, see the RingCentral for Google User Guide.

4. 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 and all requirements must be met for the password to be accepted.
5. After you **Confirm Password**, press **Continue**.

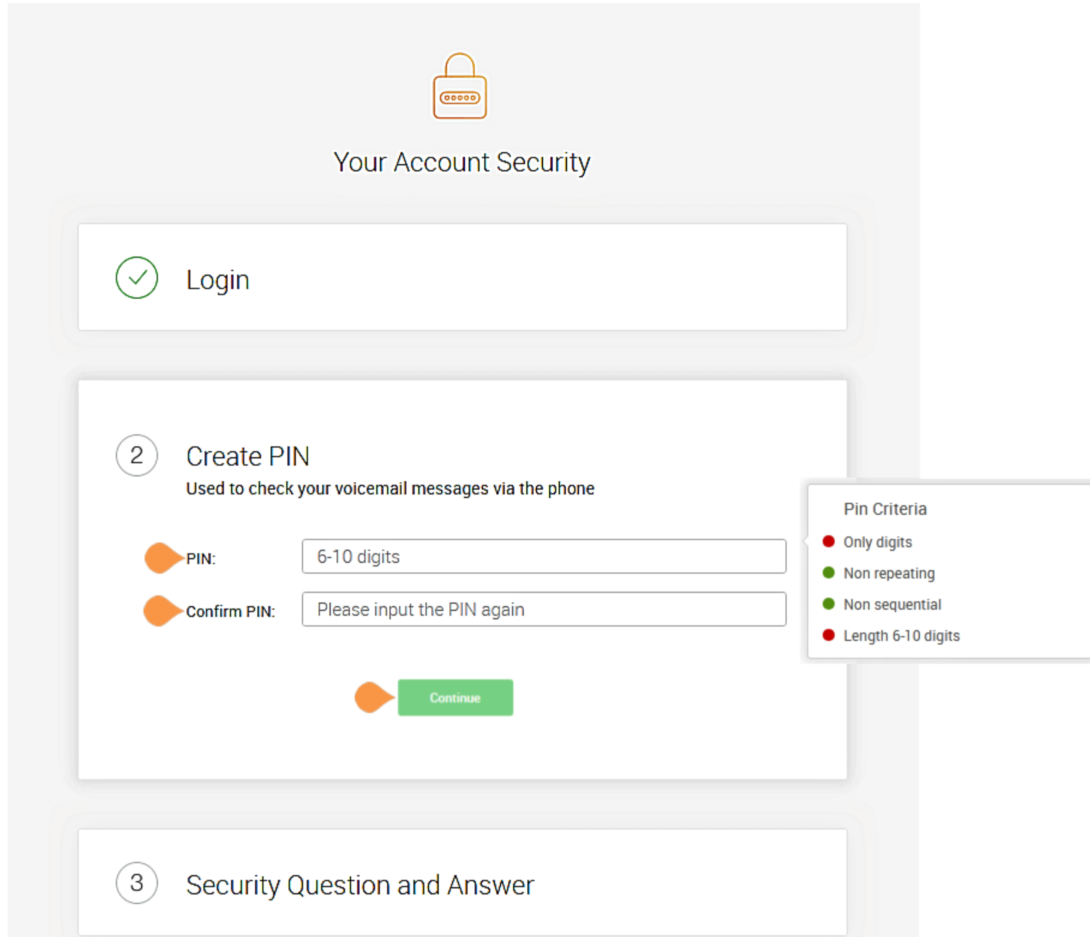
Set Your PIN

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

6. Create your **PIN**.

   Follow the requirements listed next to the **PIN** fields. A green check mark indicates when you have met a requirement. All requirements must be met before the PIN is accepted.

   You'll need this PIN when checking voicemail.
7. Press **Continue**.



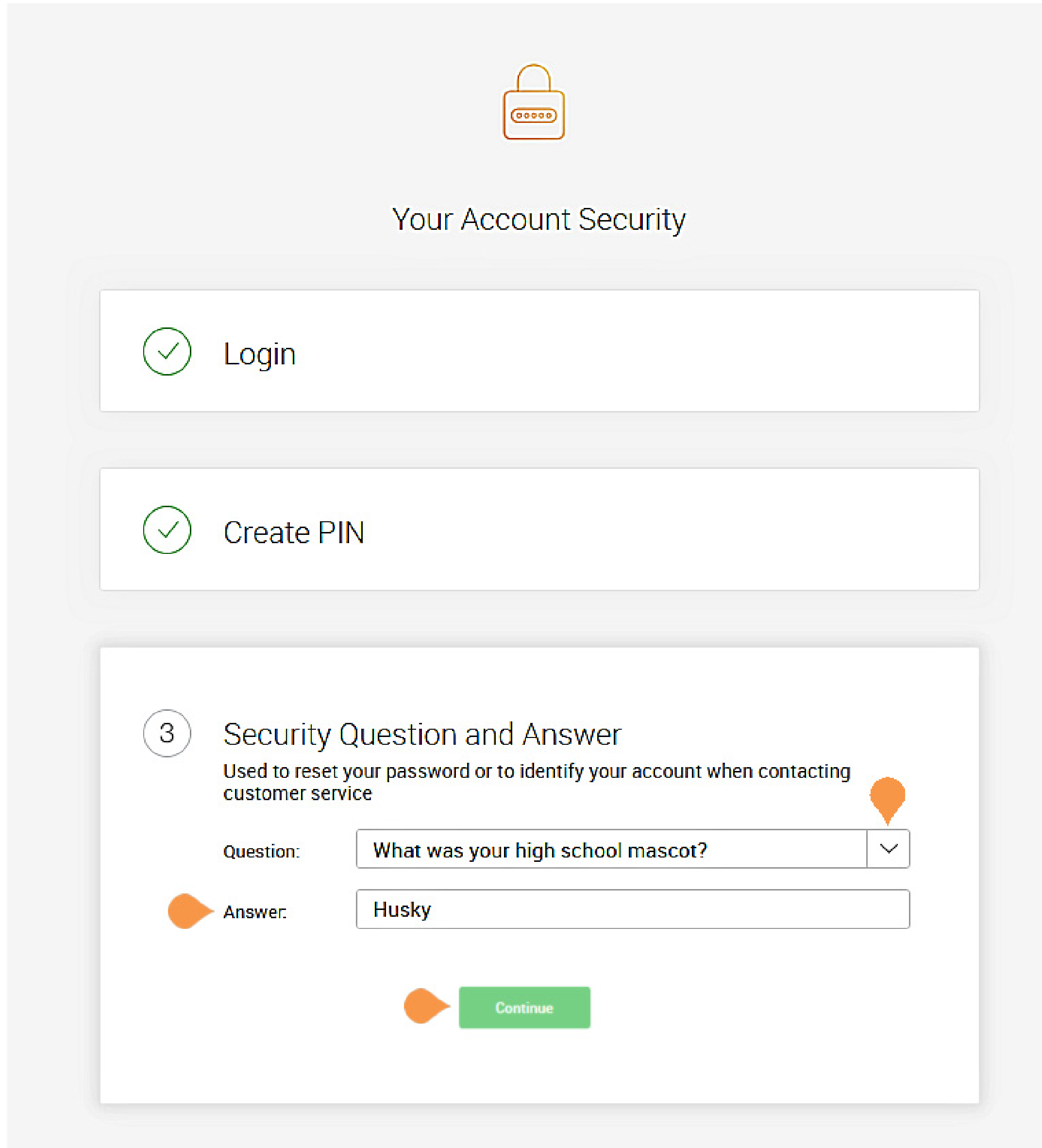
Set Your Security Question and Answer

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 Global Customer Care. Keep a record of the question and answer for future reference.*

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

Should you lose your password, PIN, or Security Question, see this Knowledge Base article, "Changing a User's Password, Pin, or Security Question."

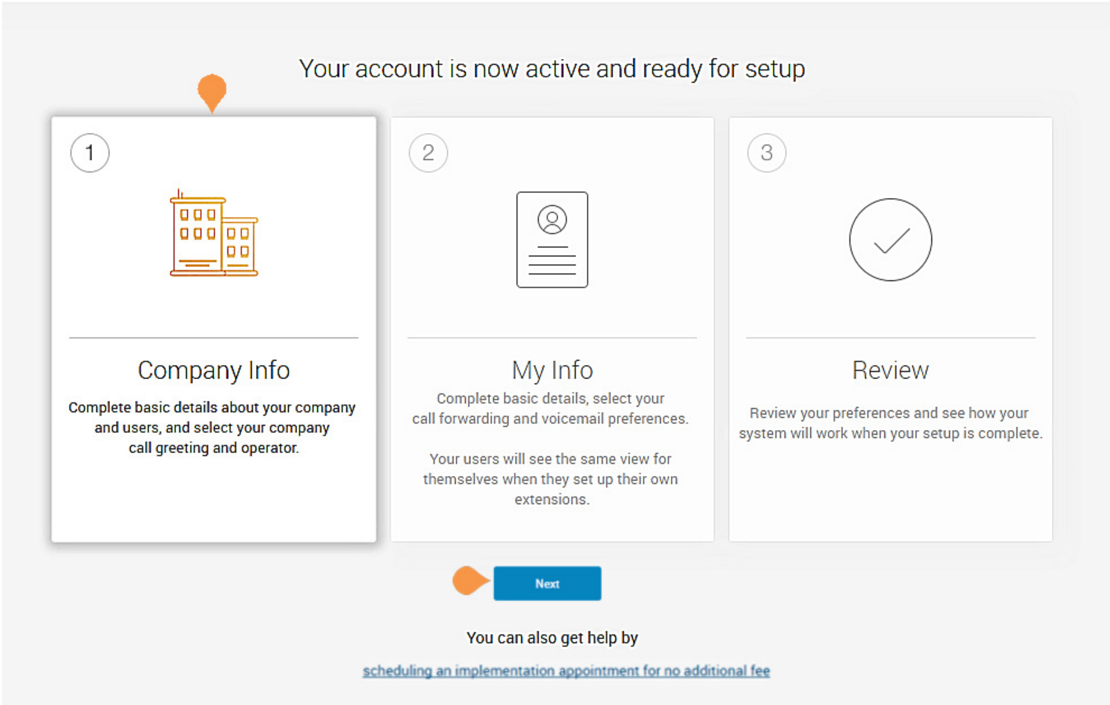


Your Company Account is now ready for setup

The next steps include setting up basic details about your company, users, call greeting and operator.

Your company's main number was assigned by RingCentral at the time of purchase in **System Setup**. At that time, your company number and fax number could have been changed. You can change the company and fax number by logging into your account after setup and navigating to the **Settings** > **Phone System** configuration tab.

11. Click **Next**.



Setting up Users

In this step, you'll complete information about your users.

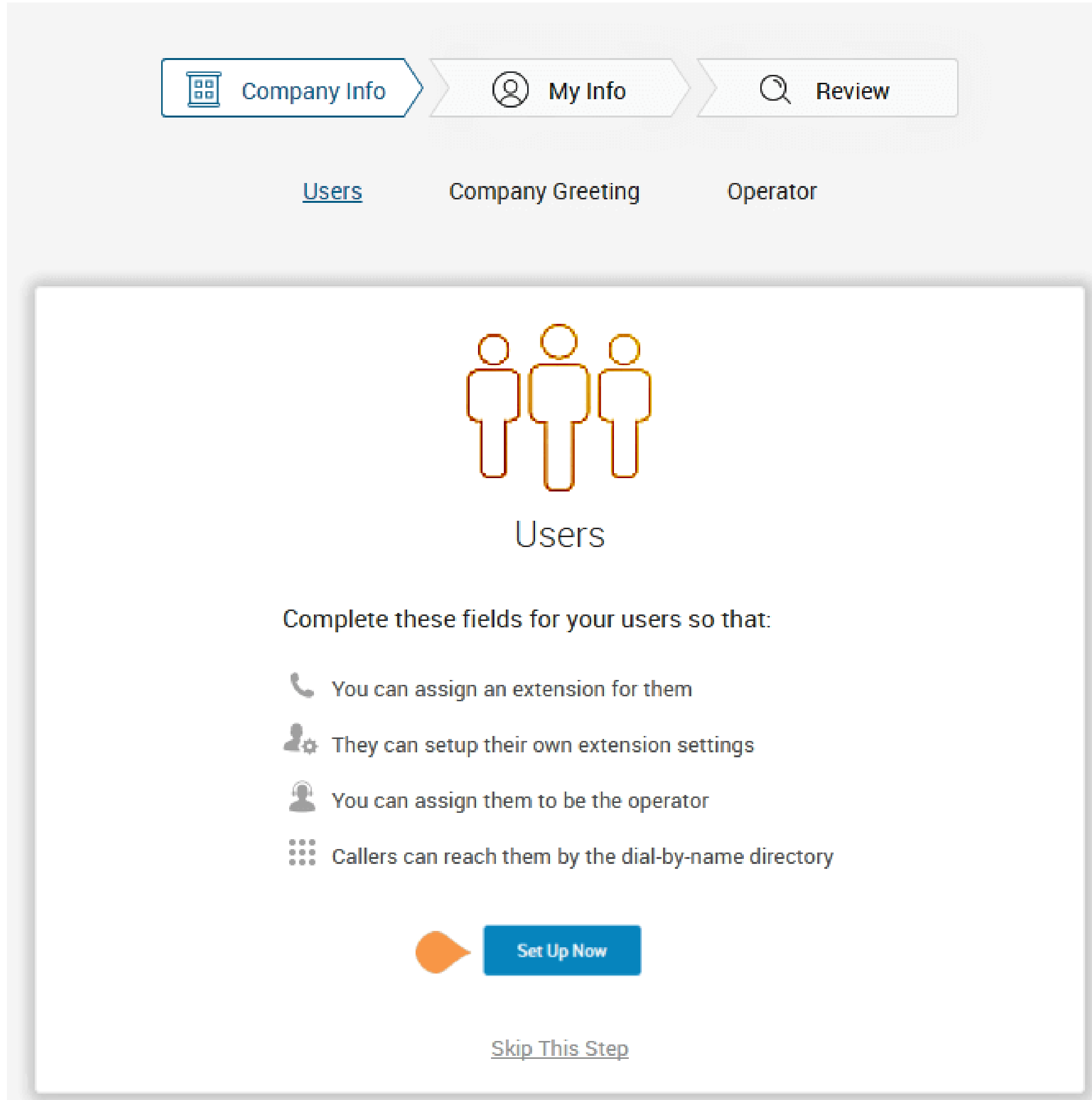
- Assign user extensions
- Enable users to change their own extension settings
- Assign an operator
- Add users to the dial-by-name directory

12. Before you click **Set Up Now**, have information ready, such as, first and last names, email addresses, contact numbers, for each user.

Note: If you click **Skip This Step**, the setup continues to "Company Greeting" on page 196.

As you set up users, each of them will be sent a "Welcome Email" so they can begin setting up their extension.

13. Click **Set Up Now**.



Set up User Profiles

In this step, you'll assign your users to a device.

When purchasing the RingCentral system, a number of phones or lines were bought for your account. Here you'll enter the details for those phones purchased.

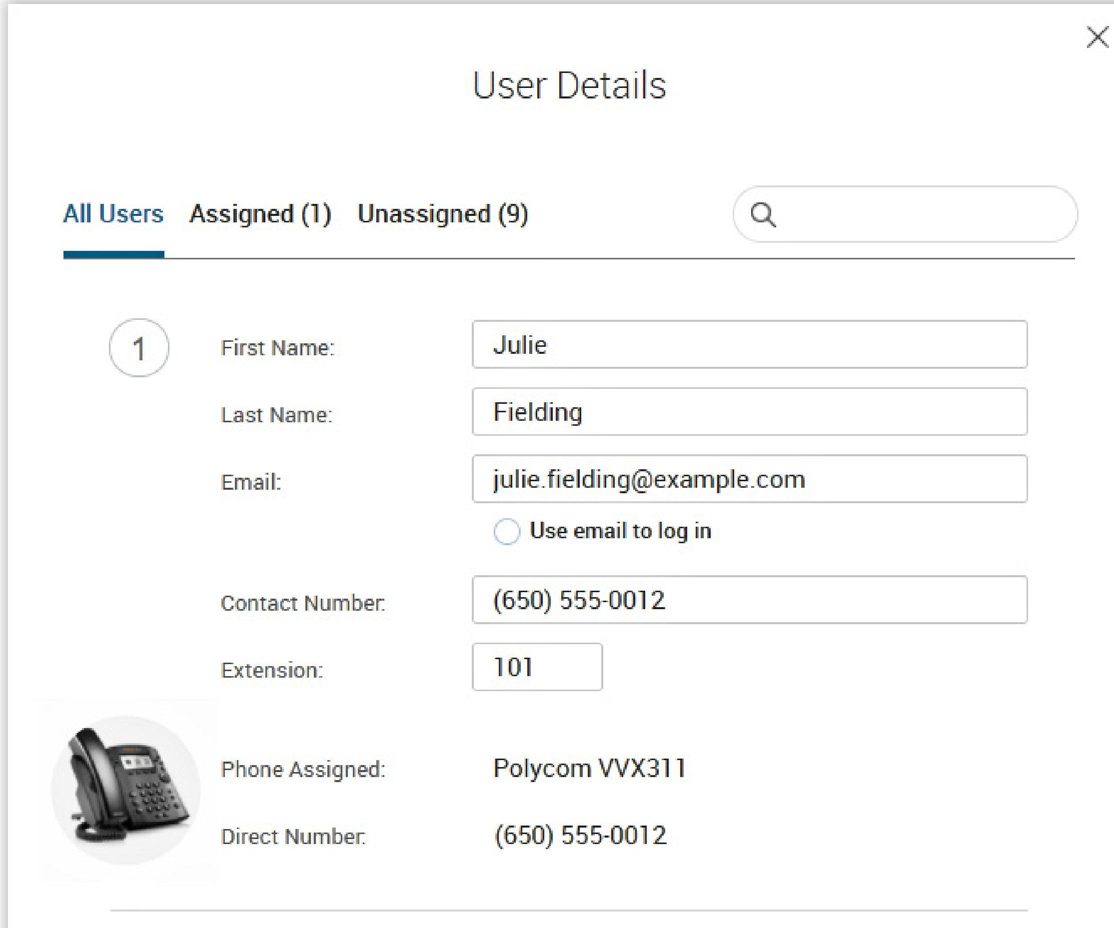
Enter the details for each of your users. This information is used for the company directory. Except where noted, this information is set by the administrator.

- First Name
- Last Name
- Email
- Enable Email to log in - The email address entered must be used for only one person and cannot be associated with more than one person or phone number.

If **Use email to log in** is not checked, the user can only log in with their phone number.

- Contact Number
- **Extension** (provided by RingCentral)
- Direct Number
- Scroll down to complete each User Details profile. Any User you do not assign at this time can be added to the system later. Go to the Users tab in the Admin Portal and click Add User.

14. When you are finished, scroll down and click **Next**.



Company Greeting

In this step, you'll set the greeting callers will hear when they dial your company's main number.

The default company greeting is shown in text below the playback controls. You can either use the default greeting or customize it.

If you choose to record a custom greeting, it can be recorded now or later.

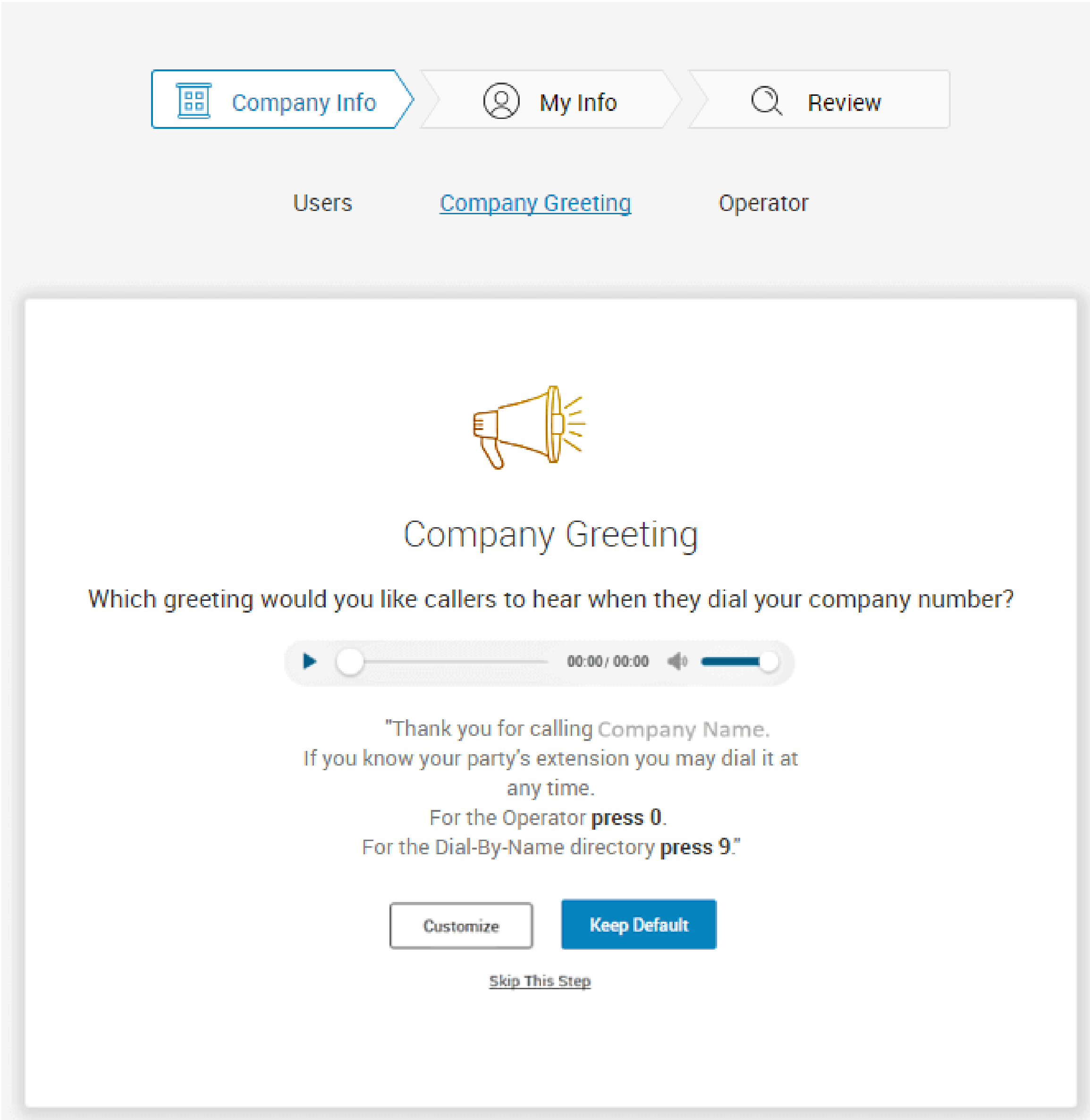
15. To skip this step now and record it later, click **Keep Default** and go to **"Set the Operator Extension" on page 197**.

To customize your company greeting, click **Customize**.

Select **RECORD OVER THE PHONE** or **IMPORT**.

- To RECORD OVER THE PHONE, follow the on-screen instructions to record your greeting. When you are finished, click **Next**.
- To IMPORT a .WAV or .MP3 file, click IMPORT, then browse and attach the filename.

When you are finished, click **Next**.



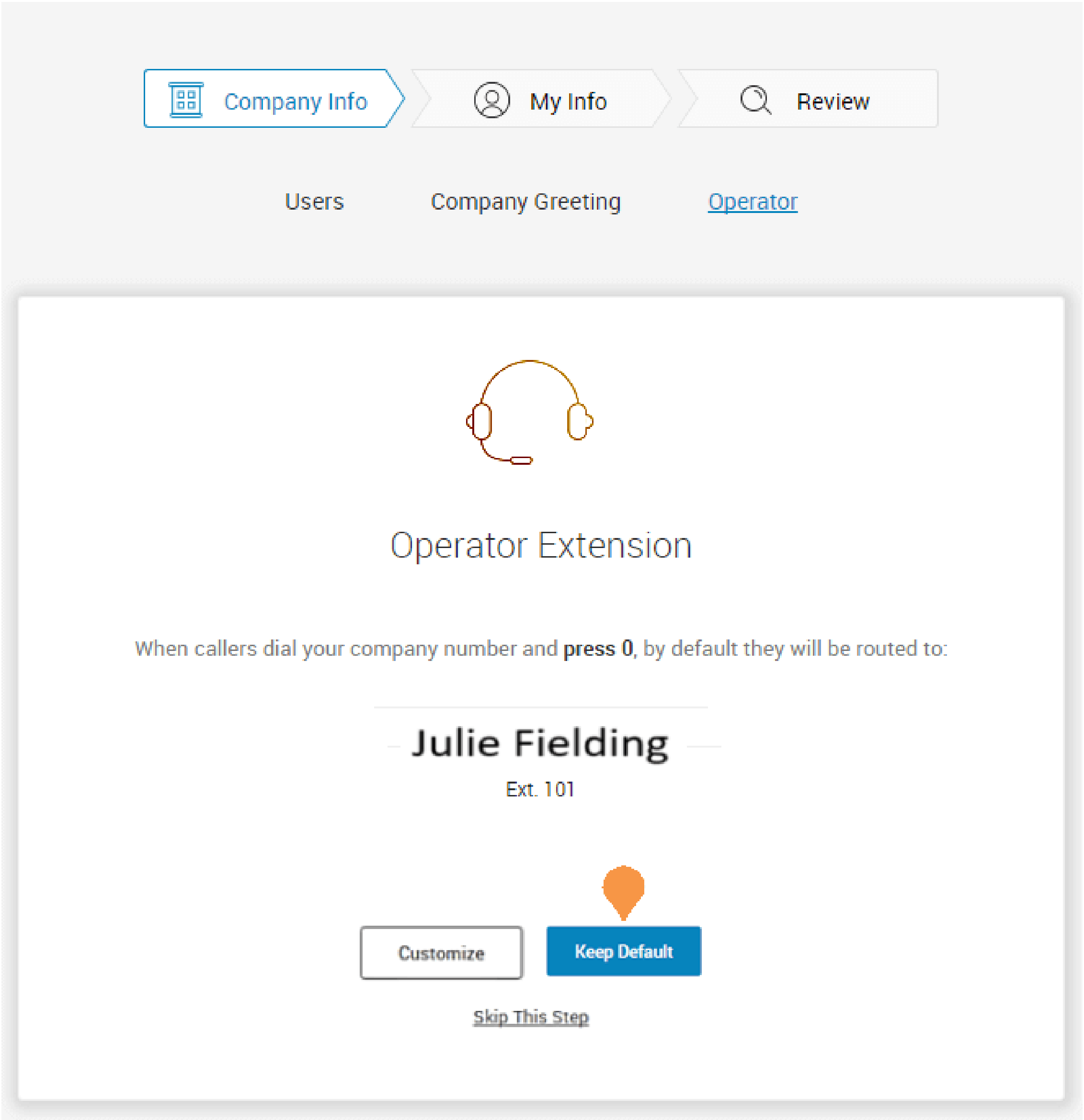
Set the Operator Extension

When callers dial your company number and press 0, the call is routed to the extension you designate.

Extension 101 is the Operator extension by default. You may reassign the Operator extension to other numbers in the system.

Note: Extension 101 has specific account authority. See the RingCentral Office Admin Guide for more information.

16. Select **Customize** or **Keep Default**.
    - To change the Operator Extension, click **Change Operator**, then select a different extension number.
    - You can also reassign the operator extension after setup. See the RingCentral Office Admin Guide for instructions.
17. Click **Keep Default**.



Verify My Info Profile

For this step, you'll make sure that your own information is correct.

18. Verify your information.

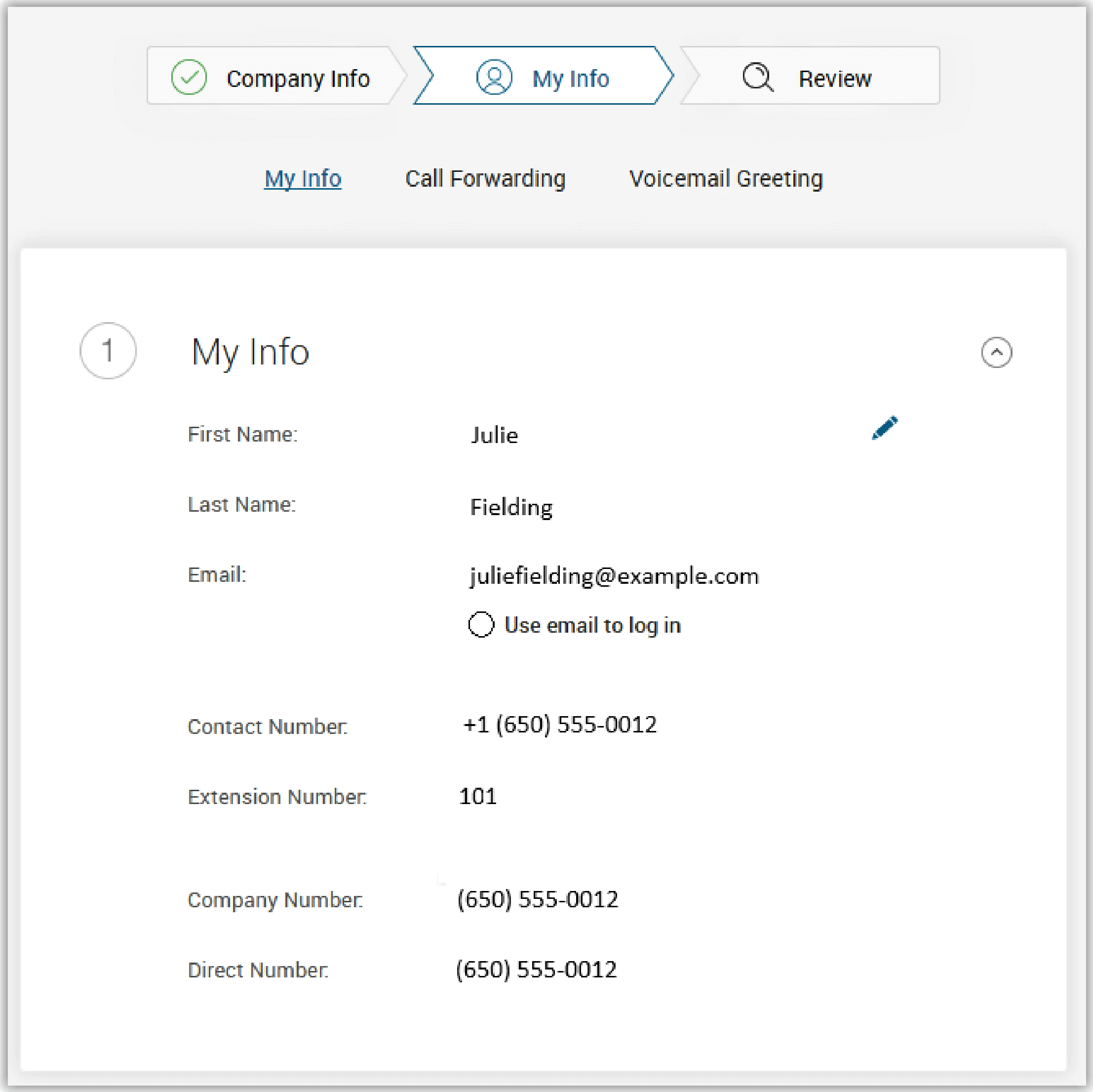
    If it is not correct, update it.

    - The name shown in your **My Info** will appear in your company directory for others to contact you.
    - Select **Use email to log in** to enable login to your account using a unique corporate email address.

If **Use email to log in** is not checked, you can only log in with your phone number.

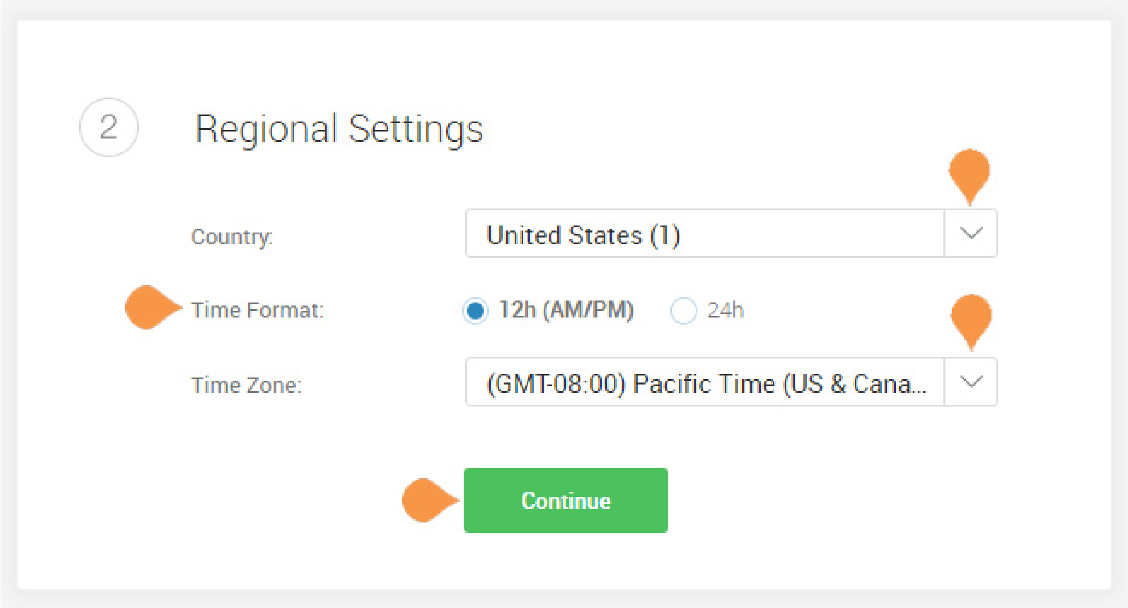
The email address must be used for only one person and cannot be associated with more than one person or phone number.

19. Scroll down to **Regional Settings**.



Check or Reset your **Regional Settings**

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

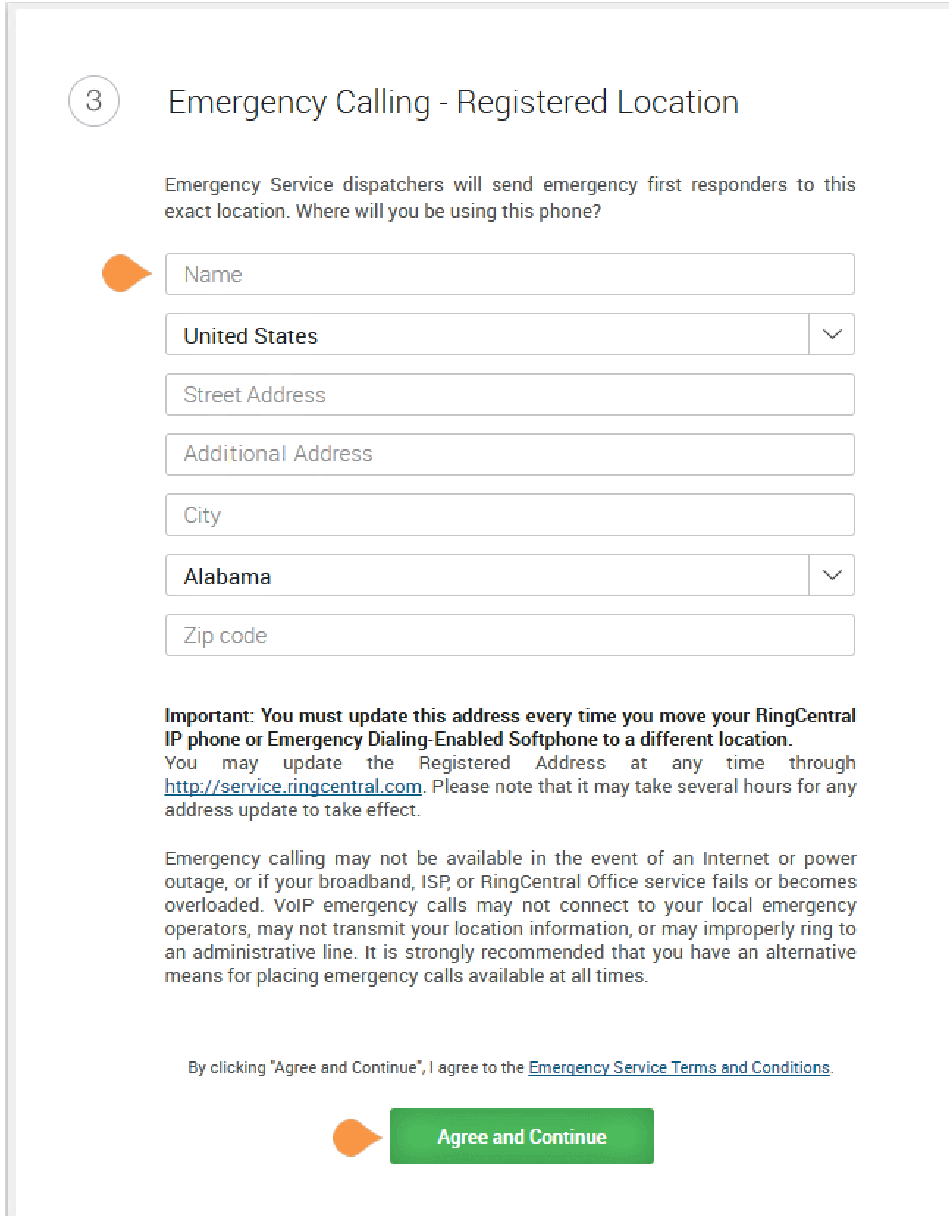


Emergency Calling - Registered Location

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.

For more information, see the Knowledgebase article, "Updating the Emergency Address."

22. Fill in the **Emergency Calling - Registered Location** form.
    - Enter your name
    - Enter your country
    - Enter your address
    - Enter your state
    - Enter your postal zip code
23. Read the agreement describing Emergency Calling - Registered Location.
24. Click **Agree and Continue.**



My Info > Call Forwarding

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.

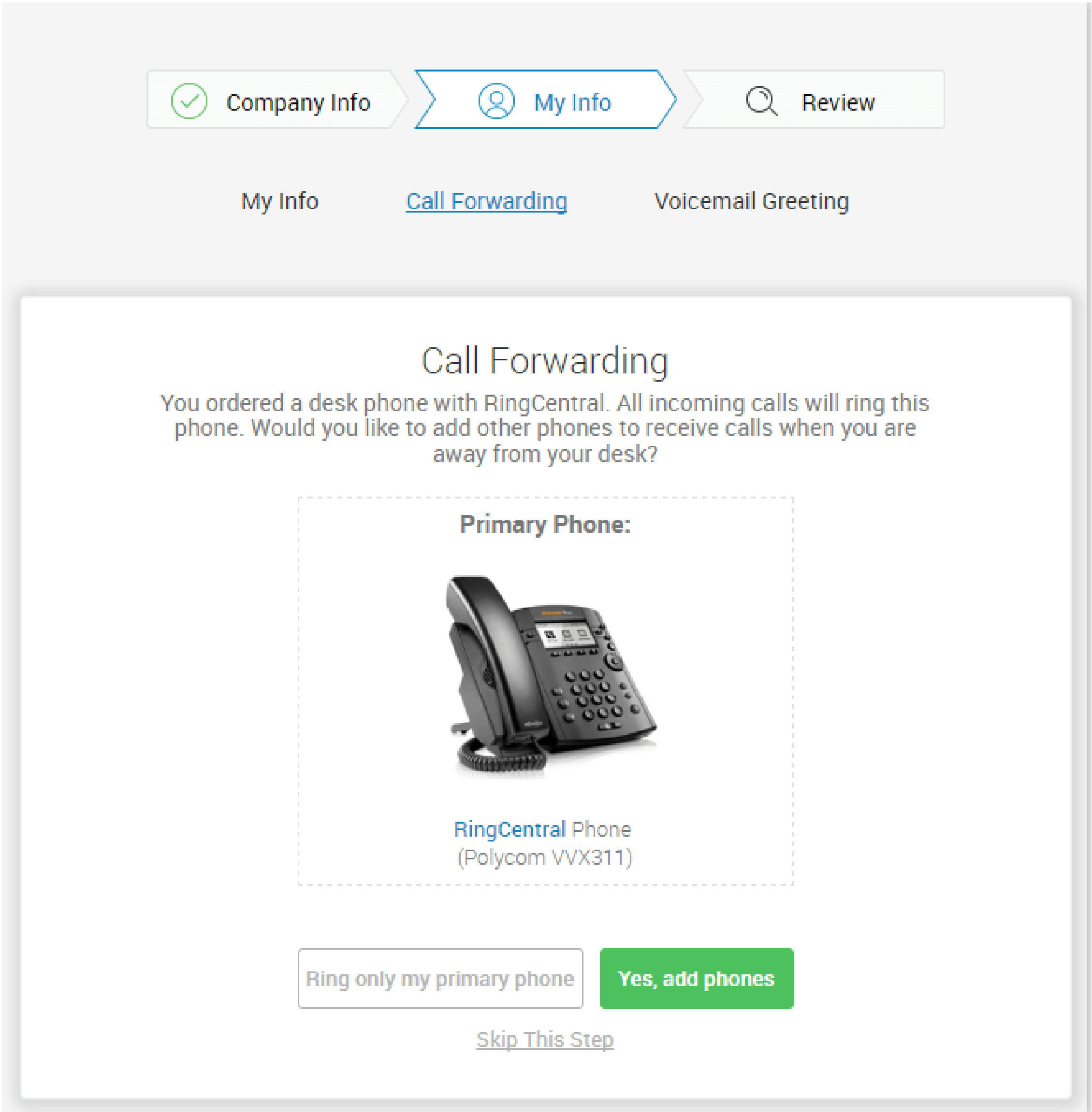
In this step you'll enable call forwarding to another number. First, note the phone extensions to which you might want to forward your calls.

You can either skip this step or set your phone to route your calls to another phone.

- To omit this step, click **Ring only my primary phone**. Then go to "My Info > Voicemail" on page 204.
- To add desk phones or a home phone (not mobile phone, see note) to which you can forward calls, click **Yes, add phones**.

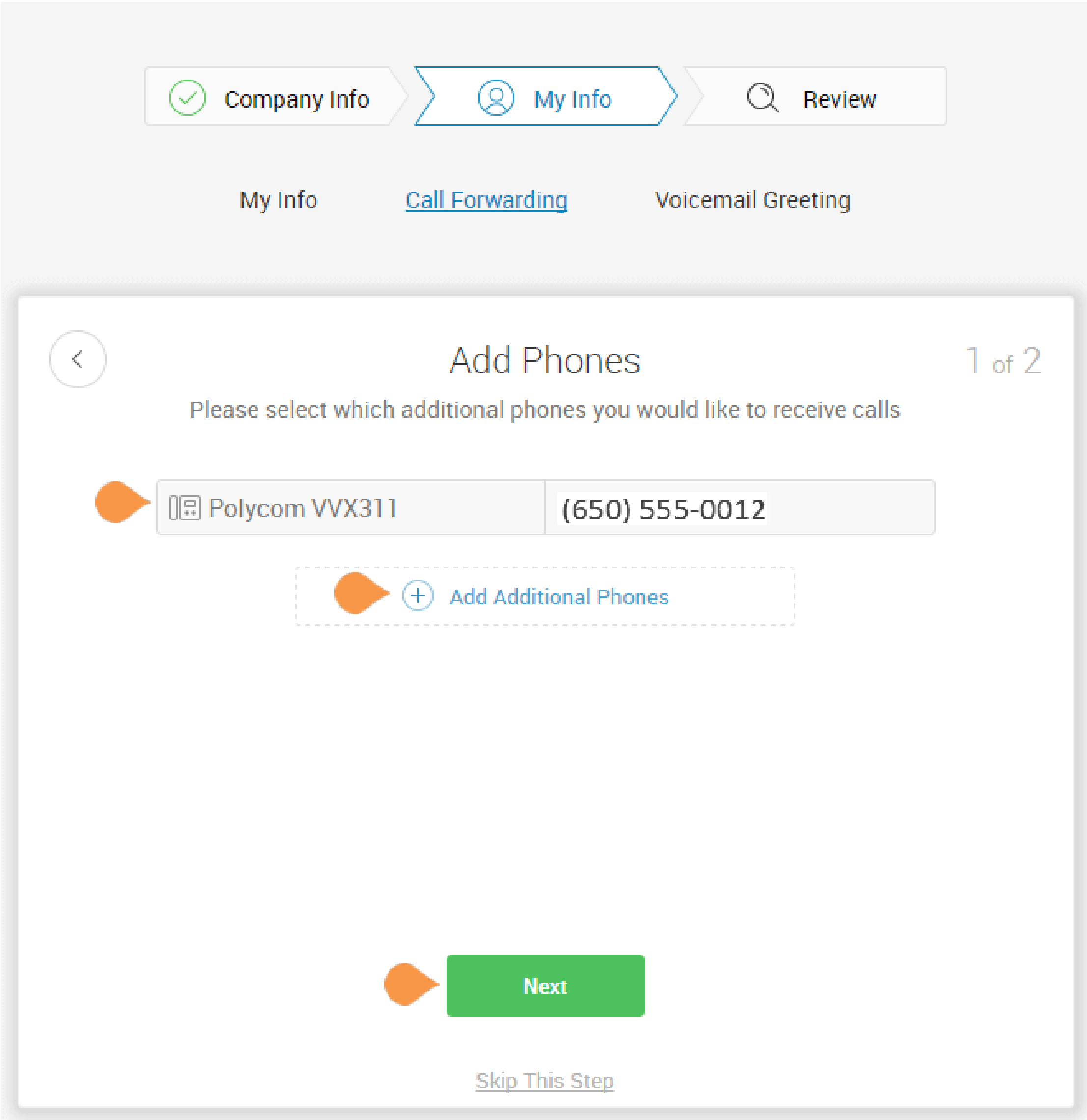
25. Click **Yes, add phones**.

Note: If you intend to use the RingCentral mobile app, do not enter the mobile number using these steps. The mobile app's function is integrated into the RingCentral system.



Select additional devices (if any) you would like to ring when you receive an incoming call to your business number. Any purchased phone or your home number can be selected.

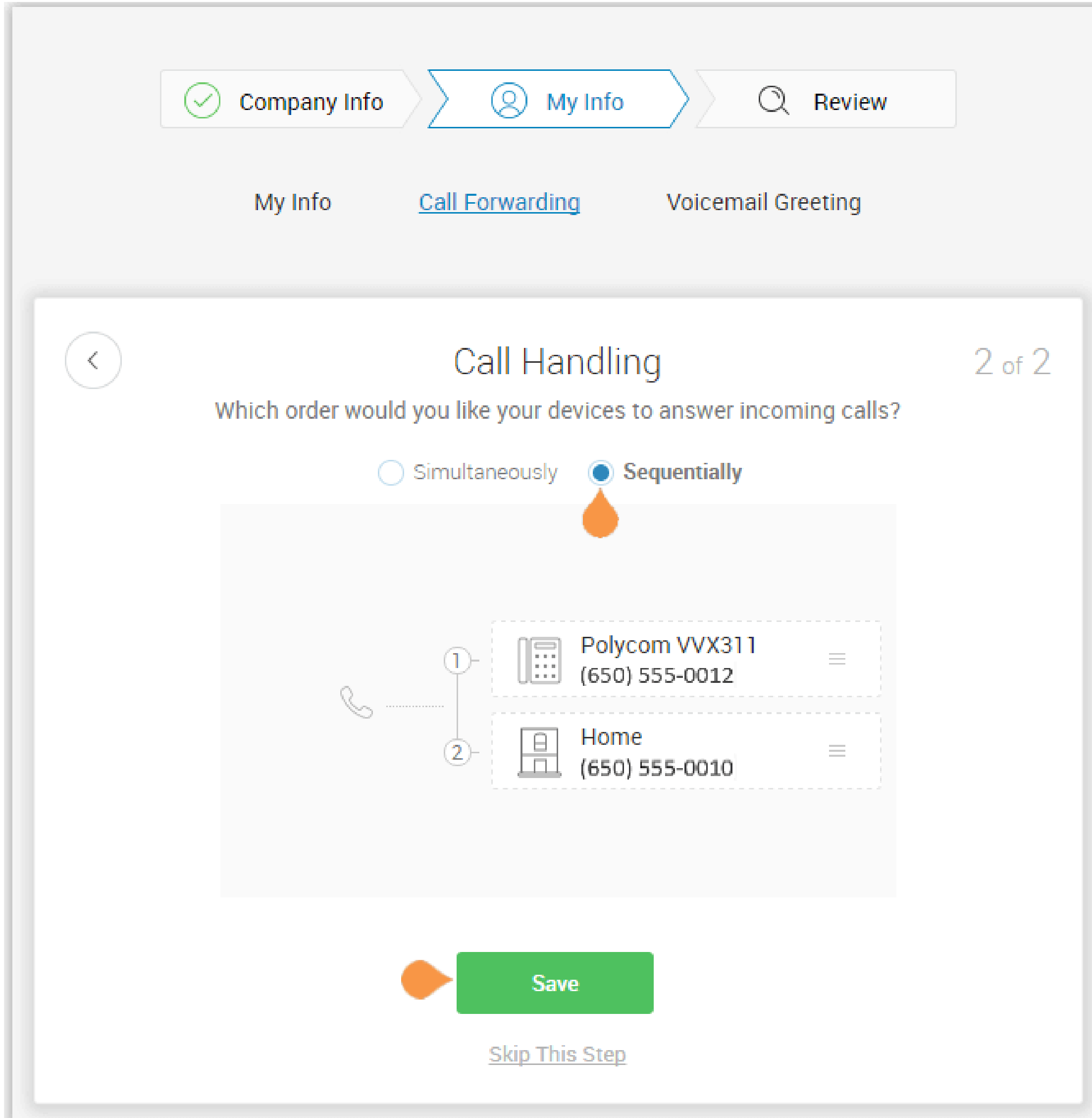
26. Select the phone to which the forwarded call will be sent.
27. Enter the number of the selected phone. Continue adding phones, by clicking **Add Additional Phones** as needed.
28. Click **Next**.



Call Handling - Simultaneously or Sequentially

29. 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.
30. Click **Save**.

The setup instructions continue on the following page.



My Info > Voicemail

Now, set up the message your callers will hear when RingCentral forwards your calls to Voicemail. In this case, this is the voicemail for extension 101.

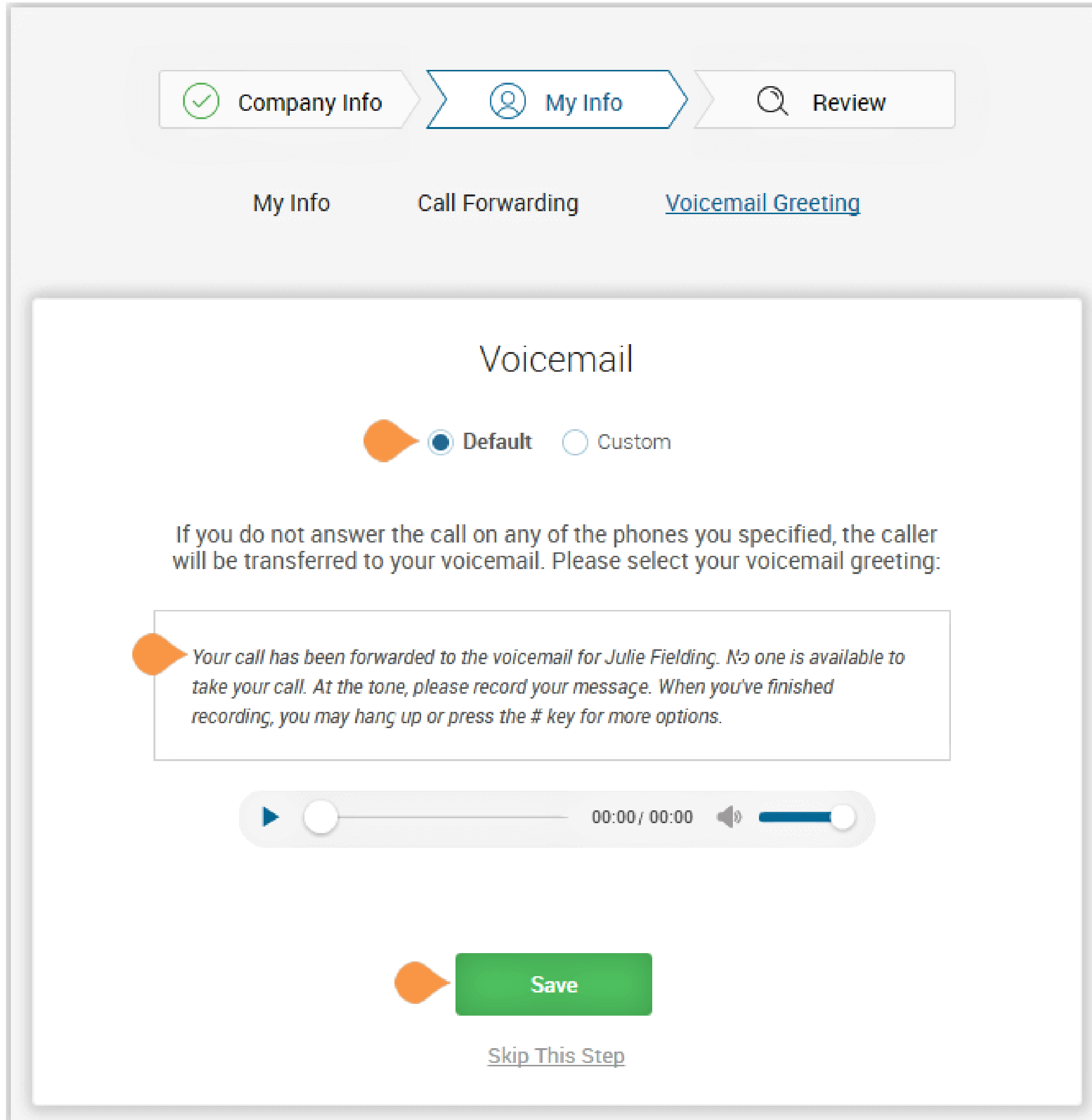
You can choose the default voicemail greeting or you can select "**Custom**" to record or import your greeting. See the default greeting text shown below the playback button.

To keep the default greeting, follow these steps:

- Click **Default**.

To keep the default, follow these steps:

- Click **Save** and skip to "Review Your Company Settings" on page 205.



Record or Import a Voicemail Custom Greeting

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

    Record your greeting over the phone, or 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.)

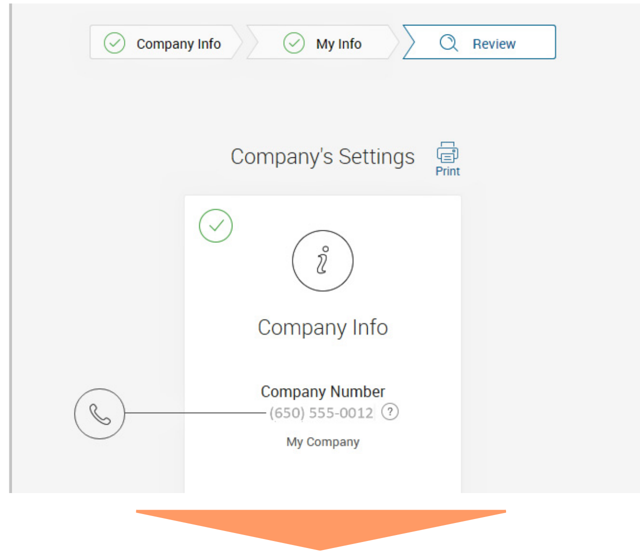
32. Click **Save**.

Review Your Company Settings

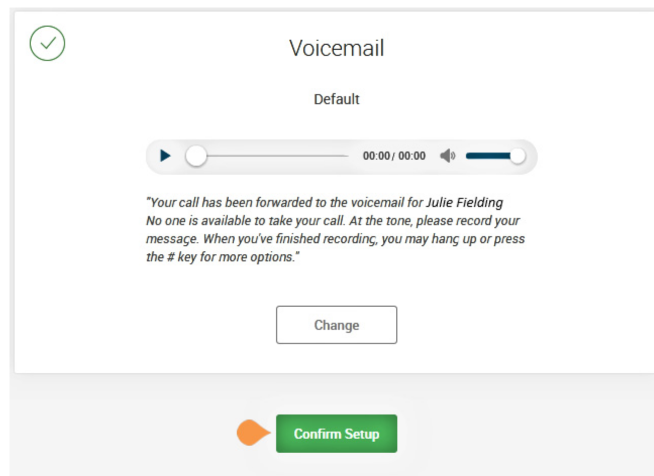
In this step, you'll review the settings set up. Check that these are correct. Continue scrolling to check or adjust all of the settings:

- Company Settings
- Company Greeting
- Users
- Operator
- The Operator Settings
- Call Handling
- Voicemail

If all settings are correct, click **Confirm Setup**.



Continue to final step.



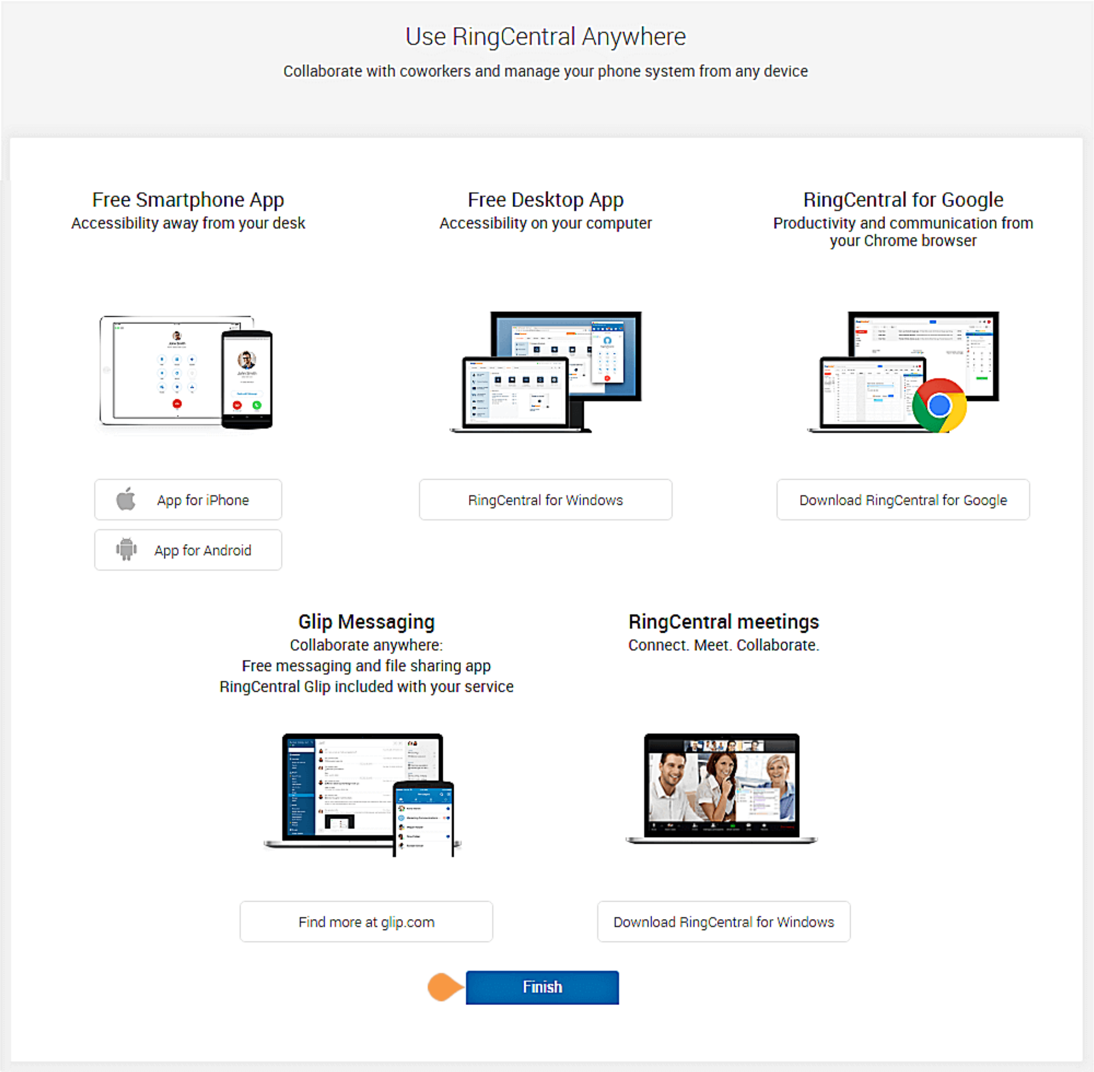
Use RingCentral Anywhere

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 RingCentral applications.

- You can download apps by clicking on this page. You can also download apps from the RingCentral website, see Downloads.
- For more information about apps you can use with RingCentral Office, see the RingCentral Office Admin Guide.

33. Click **Finish**.

Continue to the following page.



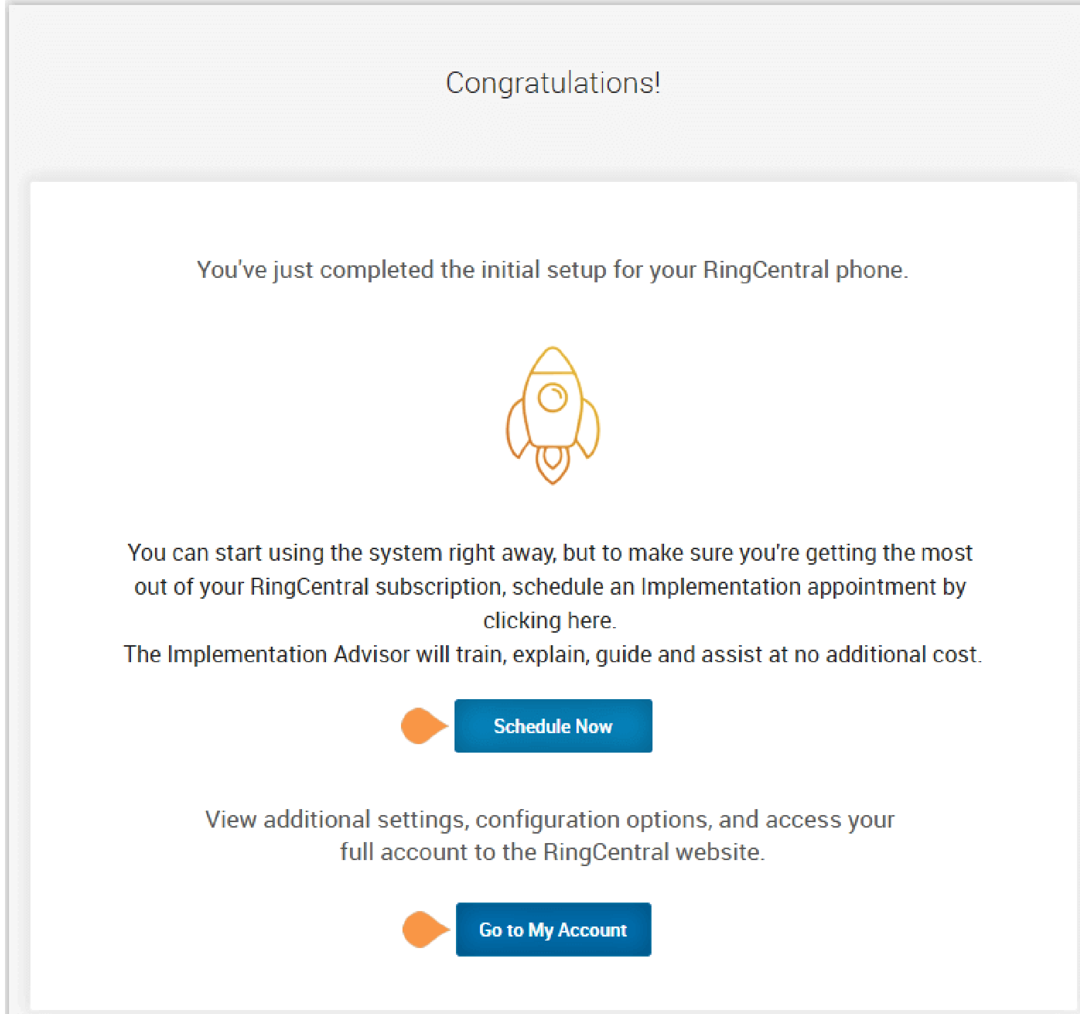
Congratulations!

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

- If desired, click **Schedule Now** to schedule an appointment with an implementation advisor who will assist you in setting up your RingCentral phone system.
- Otherwise, click **Go to My Account** to access your account and view additional settings.

34. Click **Go to My Account**.

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



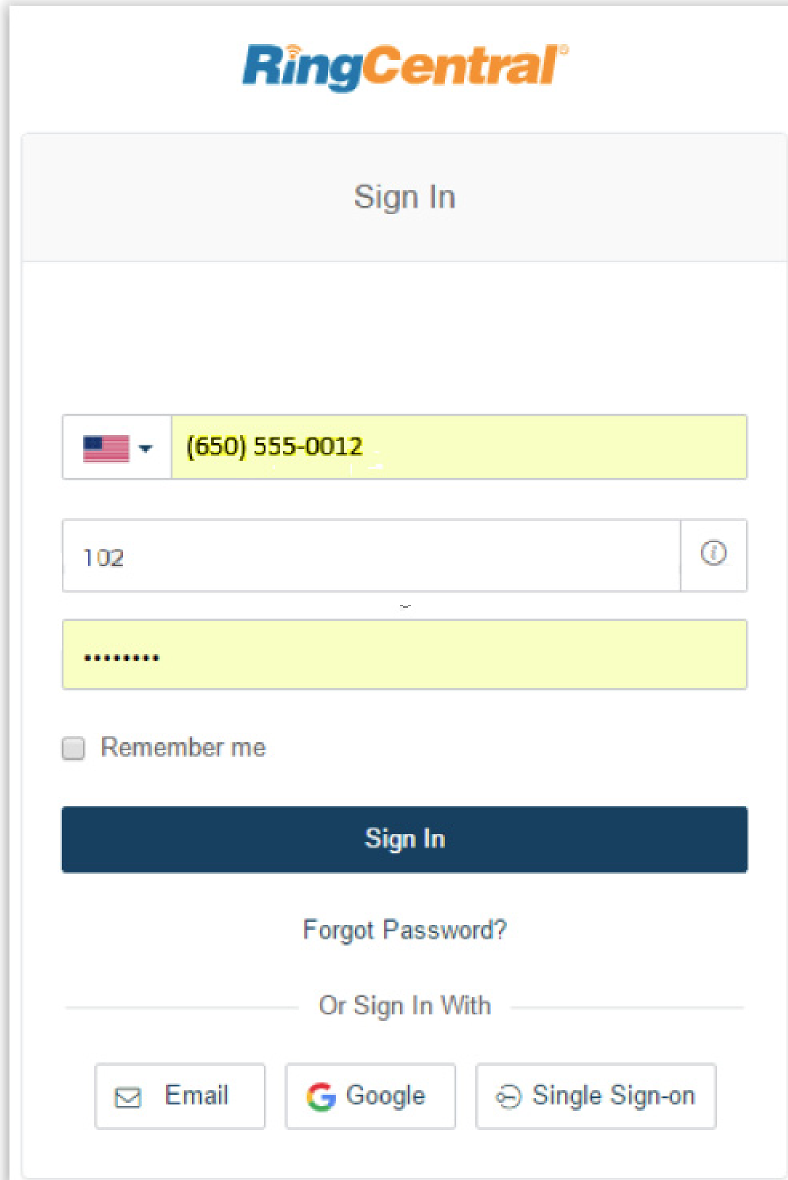
Sign In

The RingCentral **Sign In** screen appears.

35. Enter your RingCentral phone number, from the **Congratulations!** display, and your password.
    - If you have an external phone number assigned, enter it here.
    - If you have only an extension assigned, enter the company's main RingCentral phone number, your extension, and then your password.
36. Click **Sign In**.

You can sign-in with a valid Email, Google Gmail (or G Suite), or via Single Sign-on. For more information, see the RingCentral Office Admin Guide.

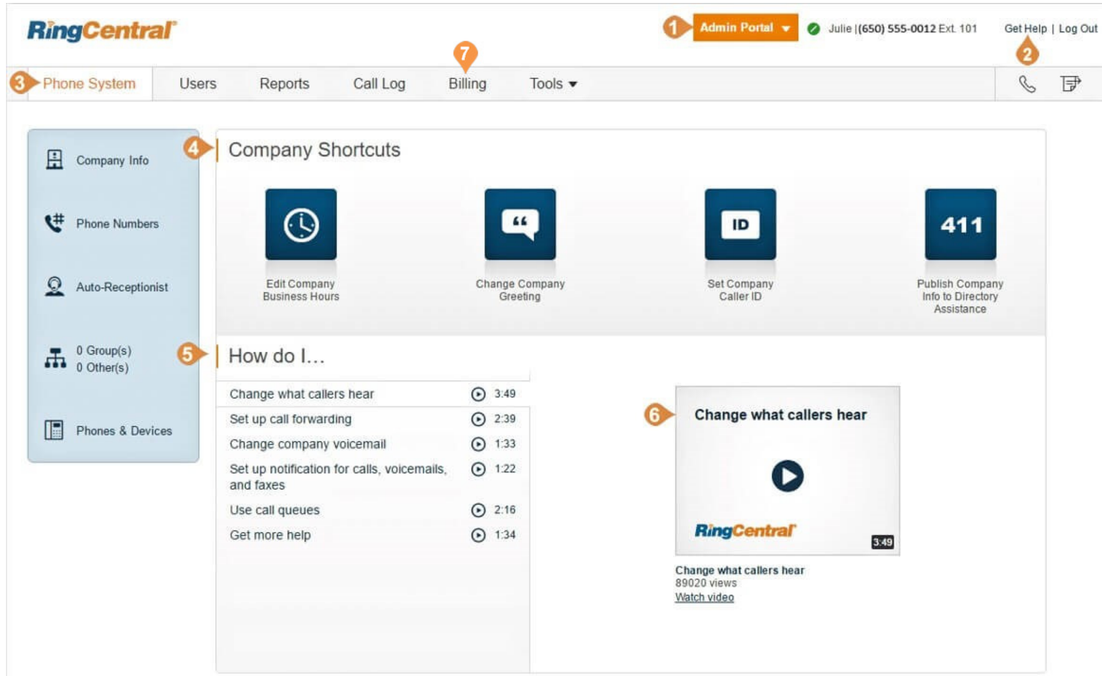
- To log in with **Email**, log in with your corporate email account.
- To log in with **Google**, your account must have been set up with a valid Google gmail address and password. The administrator configures a Google email address when assigning an extension and verifies the uniqueness of the email address. By default, users can log in with their Google email address. Click **Google** and enter your gmail address and password.
- To log in with **Single Sign-on**, click **Single Sign-on** at the bottom of the screen and enter your email address on the following screen, then log in with your corporate credentials. Note: Single Sign-on must be enabled for your account by your system administrator.



The Admin Portal

Your RingCentral Office Admin Portal opens. Take a tour of your Admin Portal page:

1. The **Admin Portal** button lets you toggle between the admin interface or the user interface, **My Extension**.
2. **Get Help** lets you find answers to most of your questions or request Support.
3. Menu tabs lead you to a tab-specific menu on the left. Each tab has a different menu list. For example, the menu list for **Phone System** tab is **Company Info, Phone Numbers, Auto-Receptionist, Groups-Others,** and **Phones and Devices.**
4. **Company Shortcuts** provide buttons to frequently accessed settings.
5. **How do I** ... lists available admin-specific videos.
6. A featured video.
7. Check the **Billing** tab for questions relating to your account.



To Find Information About

- The ***RingCentral Office Admin 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.

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.

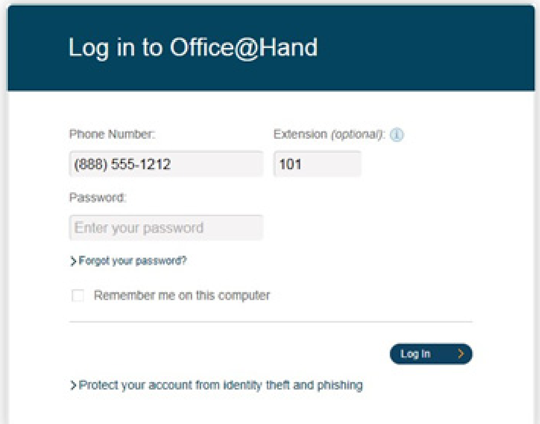
Appendix B: Bulk Purchase/Upload

Introduction

Office@Hand streamlines large-customer on-boarding with bulk purchase, upload, and activation for up to 1000 users at a time.

Let's say a customer is doing a major expansion of sales offices in multiple cities and wants to add hundreds of users and purchase hundreds of phones for them.

The customer Administrator begins by logging into their Office@Hand Web account.



Bulk Purchase of Users

Call Go to Settings > Phone System. Select Users, then select Add Users. The Account Status at the top of the panel shows your current Plan.

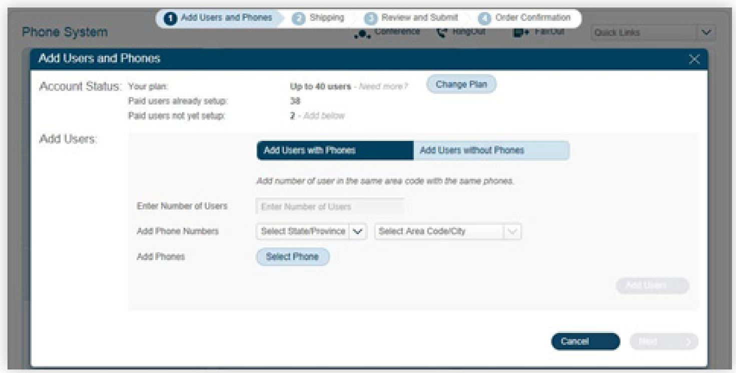
Click the button **Add Users with Phones** (or **Add Users without phones**). First enter the number of users who will be in a specific area code and assigned a specific model of phone.

Click **Select State/Province** and then the **Area Code** or **City** for the phone numbers for these users.

Click **Select Phone**. Review the phone devices listed, scrolling down to see all devices.

Click **Select** next to the phone type to be purchased for these users.

Then click **Add Users** to add them to the Your Selection list at the bottom of the page, which shows your order.



Repeat this process to add users in a different area code, or to add users with a different phone model: Enter the number of users, select the state and area code or city, then select a model of telephone. And click **Add Users** each time.

As you build your order, Your Selection shows the details at the bottom of the screen.

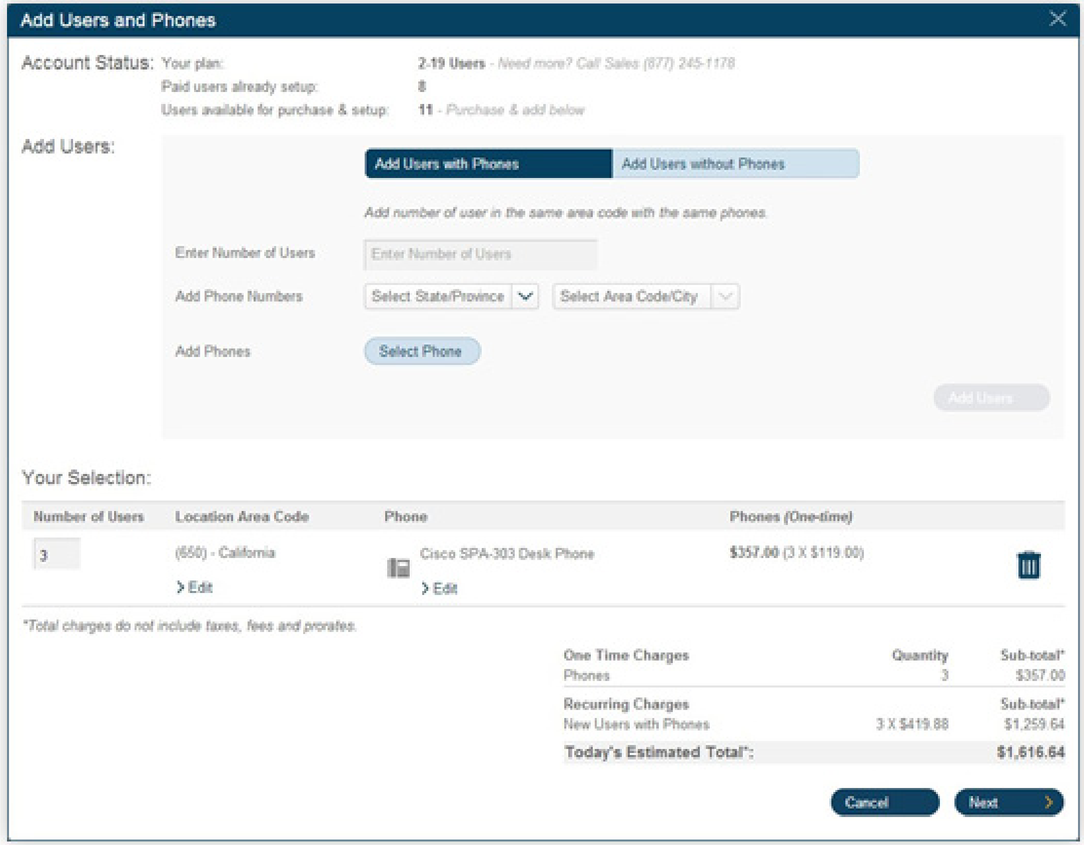
Now click the button **Add Users without Phones**. Select a location (State/Province and Area Code/City).

Repeat this process until all the users, with or without phones, in various area codes, and assigned various phones, have been ordered.

Review the order in the Your Selection list for accuracy.

Your Selection also shows the running total of Recurring or monthly charges for users and one-time charges for phone devices.

When ready, click **Next**.(If the city or area code you selected for a group of users doesn't have enough phone numbers available for this order, you will get a pop-up error message at this point. Click **Edit** to select another city or area code. (Or contact your sales representative if you're having trouble.)



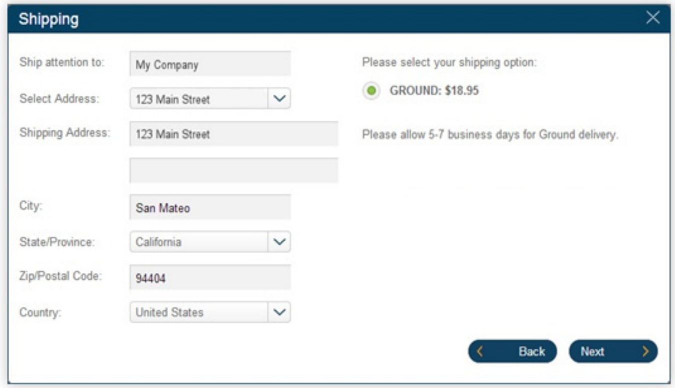
On the Shipping page, check and if necessary update the account information displayed, including the shipping address if you ordered phones.

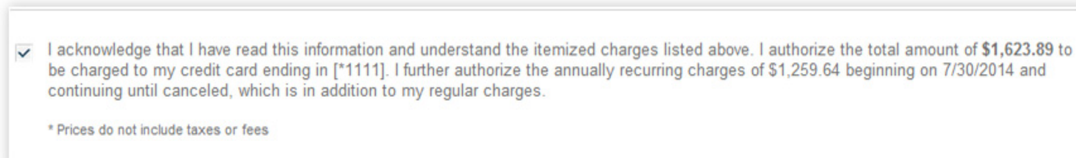
Please allow five to seven days for Ground delivery. Note: Each order can be delivered to only one address. To deliver phones to several addresses, enter separate orders for each address.

Click **Next**. On the Review and Submit screen you will have a chance to review your total phone order and all costs including Taxes, Charges and Fees, and Shipping.

Click the Back arrow if you want to revise your order. If satisfied, click the Acknowledgment box at the bottom of the page, and then click Next.

An email confirmation of your order will be sent to the email address for your account.





Bulk Upload of Users

A customer who wishes to activate a large number of purchased users at once should contact their Sales Agent for assistance.

Rather than entering users' information one user at a time, the Sales Agent will use a template file to upload and activate up to a thousand users at a time.

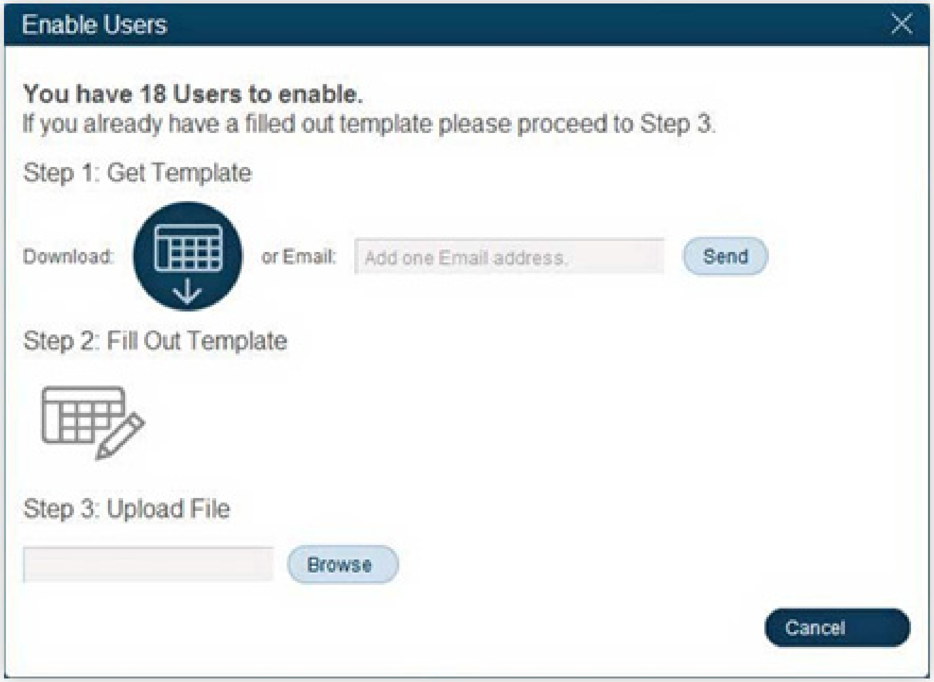
The Sales Agent accesses the customer account through the sales administrative screen, and can review the account with the customer.

The agent's template file will contain all the Unassigned User phone numbers and extensions currently in the customer account.

The customer must provide the data on the users to assign to each number or extension: user name and email address, and for users who will be assigned direct lines, E911 emergency location information such as street address.

The Sales Agent can assist the customer in providing the right data.

The customer can send this data to the Sales Agent to be transferred into the Template and make necessary edits. Or the Sales Agent can email the Template to the customer to be filled out and returned. The template contains instructions for proper use.



Activation of Users

The Sales Agent checks the finished Template to ensure that the customer's users are assigned to the area codes and Direct Lines or Extensions desired by the customer. The Sales Agent will also ensure that users with direct lines provide the required E911 address information.

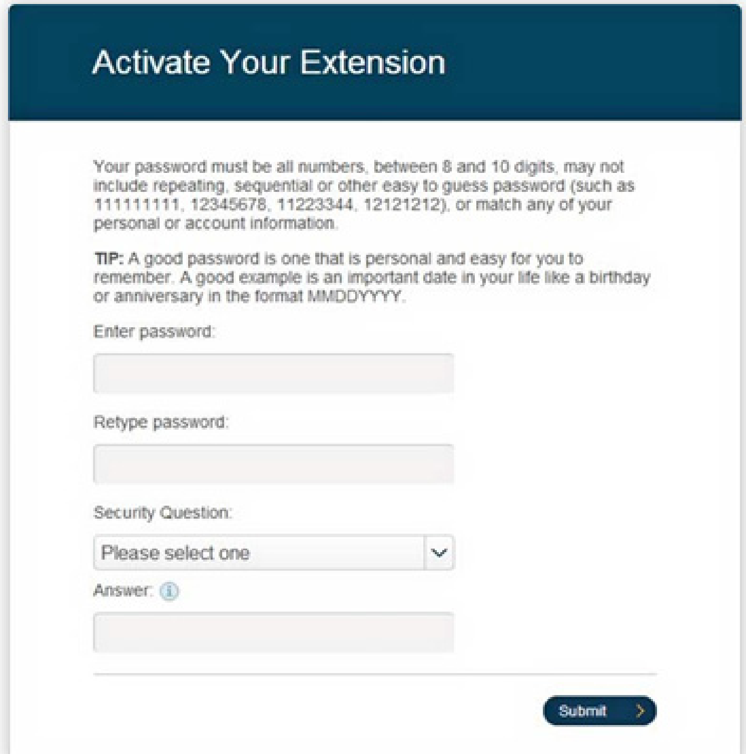
Once the template is completed and checked it is uploaded into the system for processing. The system generates a preview, with problem areas highlighted on the screen in red, and an Errors column spelling out the problem with any field that needs to be corrected.

Common errors include missing required information; bad email addresses (usually typos); using a postbox address where a street address is required; and duplicate extensions.

The customer or the Agent downloads the file, corrects the problems, and re-uploads the file. (Don't edit out the Errors columns; that will be handled automatically.)

Once the template has been processed and checked, and found to be correct, the Activation process begins.

The Sales Agent will enter one or more email addresses that will be notified when the processing is done.



Appendix C: Multi-Account Access

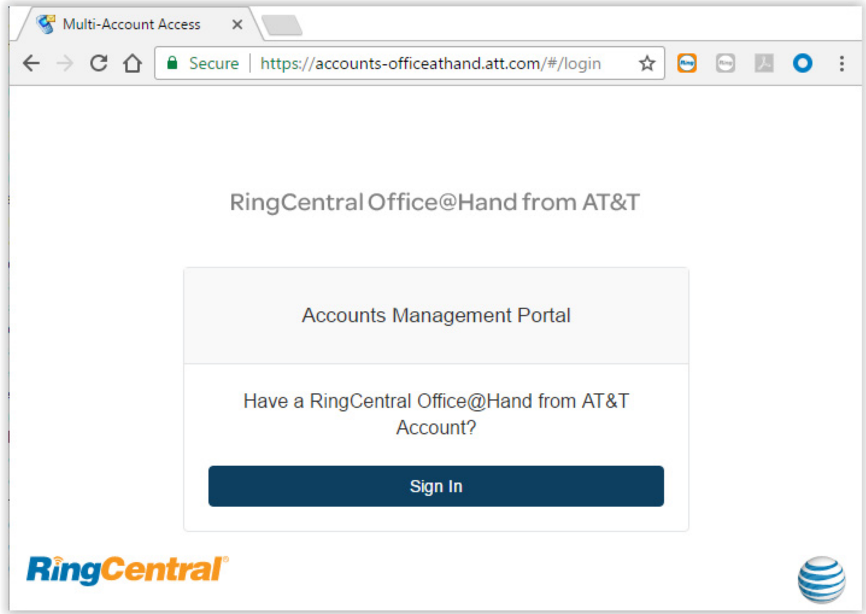
Account Management Portal

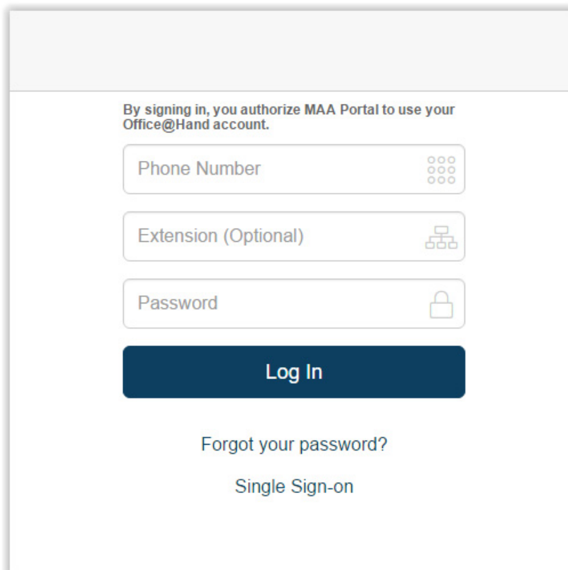
The Multi-Account Access feature centralizes access for customers with multiple RingCentral Office@Hand accounts, and allows them to link all their accounts in the accounts management portal. It allows company admins to access their RingCentral accounts from a single log in. It also allows administrators to view services for all accounts from a single location.

The Multi-Account Access feature increases the efficiency of multiple account management for those administrators who manage multiple accounts, or who support multiple clients. From the management portal, you can easily switch from one account to another. The portal provides a consolidated view of all accounts, while they remain separate entities.

To access the management portal:

1. Go to accounts-officeathand.att.com.
2. Enter your credentials for an account.Click **Log In**.





Manage Linked Accounts

You can manage any number of accounts from the account management portal. Each page in the portal can display up to 20 linked accounts, and different pages are identified by page numbers.

To add accounts to the portal:

1. Click **Link Account**.
2. Enter credentials of the account.
3. Click **Log In**.
4. Repeat for each account to add.

To unlink an account:

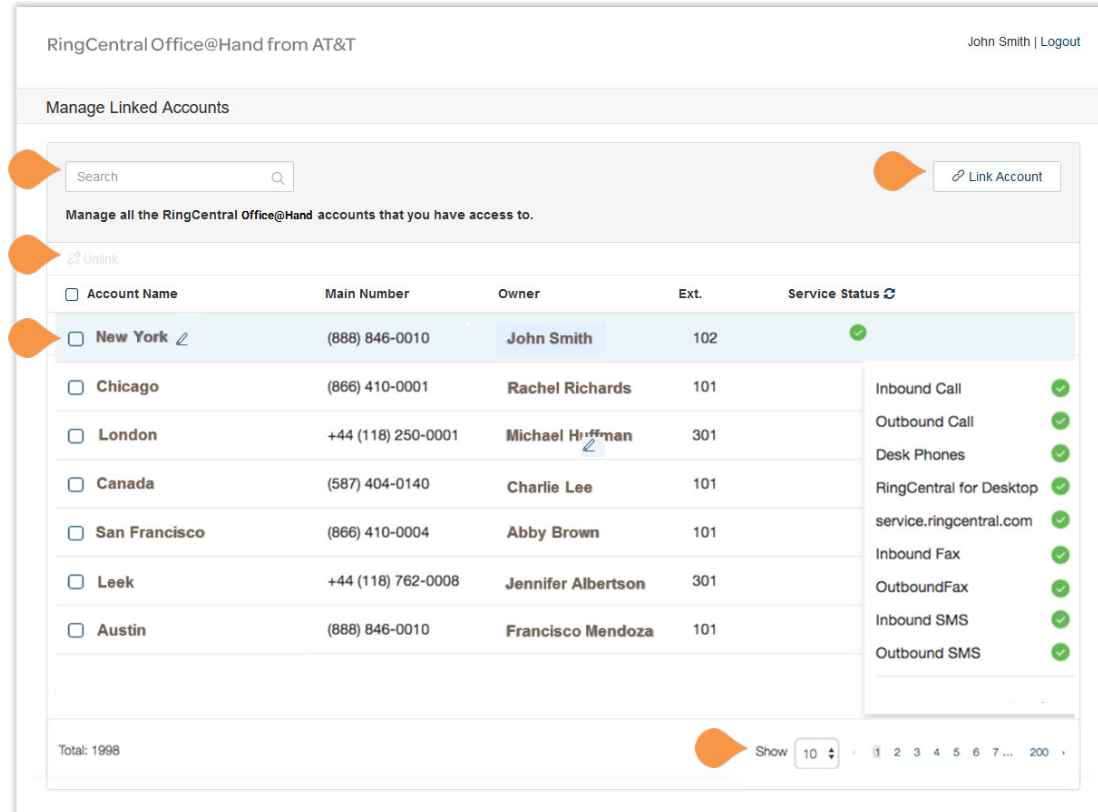
1. Select one or more account(s).
2. Click **Unlink selected account**.
3. The account is removed from the view.

To edit the account name with descriptive text:

1. Click the **Edit** icon beside the account.
2. Enter the new **Account Name**.
3. Press **Enter**.

To search for an account, enter text in the search field.

To scroll between pages, click controls at bottom right.



Access Accounts

The account management portal allows you easily launch the Admin Portal for any of your accounts, avoiding the complexity of logging in to multiple accounts.

To trigger a login to an account:

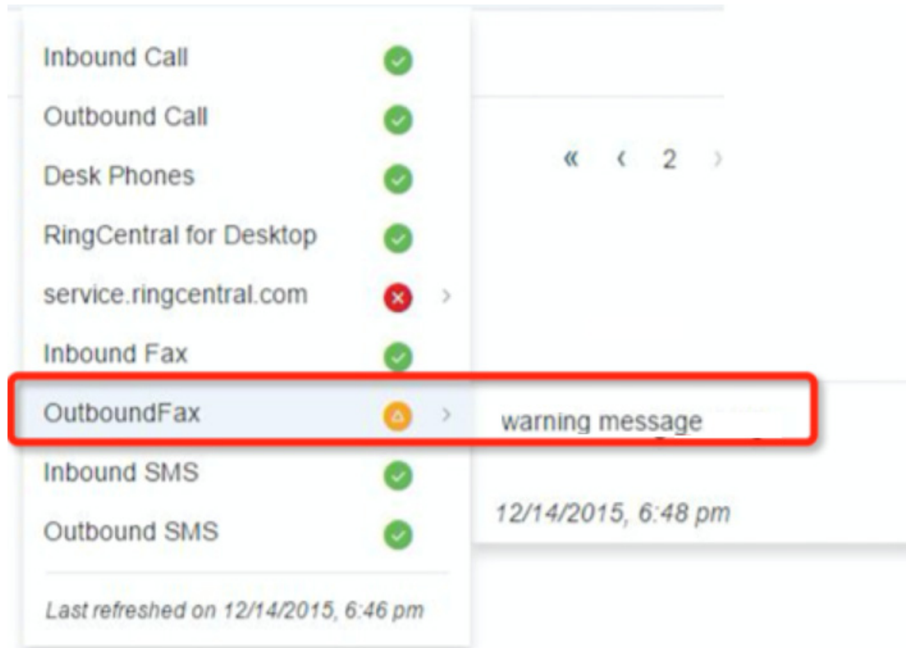
1. Click **Open** beside the account.
2. A new browser tab is launched and you are automatically logged into the Admin Portal for the account.

Manage your account as normal.

View Service Status

The account management tool reports status for the following services:

- Inbound Calls
- Outbound Calls
- Desk Phones
- RingCentral for Desktop
- service.ringcentral.com
- Inbound Fax
- Outbound Fax
- Inbound SMS
- Outbound SMS



Service status is refreshed automatically every three minutes. Service status details and the date of the last refresh are displayed when you hover. To manually refresh the service status, select the **Refresh** icon:

An abnormal service status results in the display of an error reason when you hover on the status. The following statuses are reported:

Green: the service is available.

Yellow: there is an error related to the service.

Red: the service is unavailable.

Grey: service status has not been reported.