RingCentral Office@Hand from AT&T

Start-up Guide for Administrators
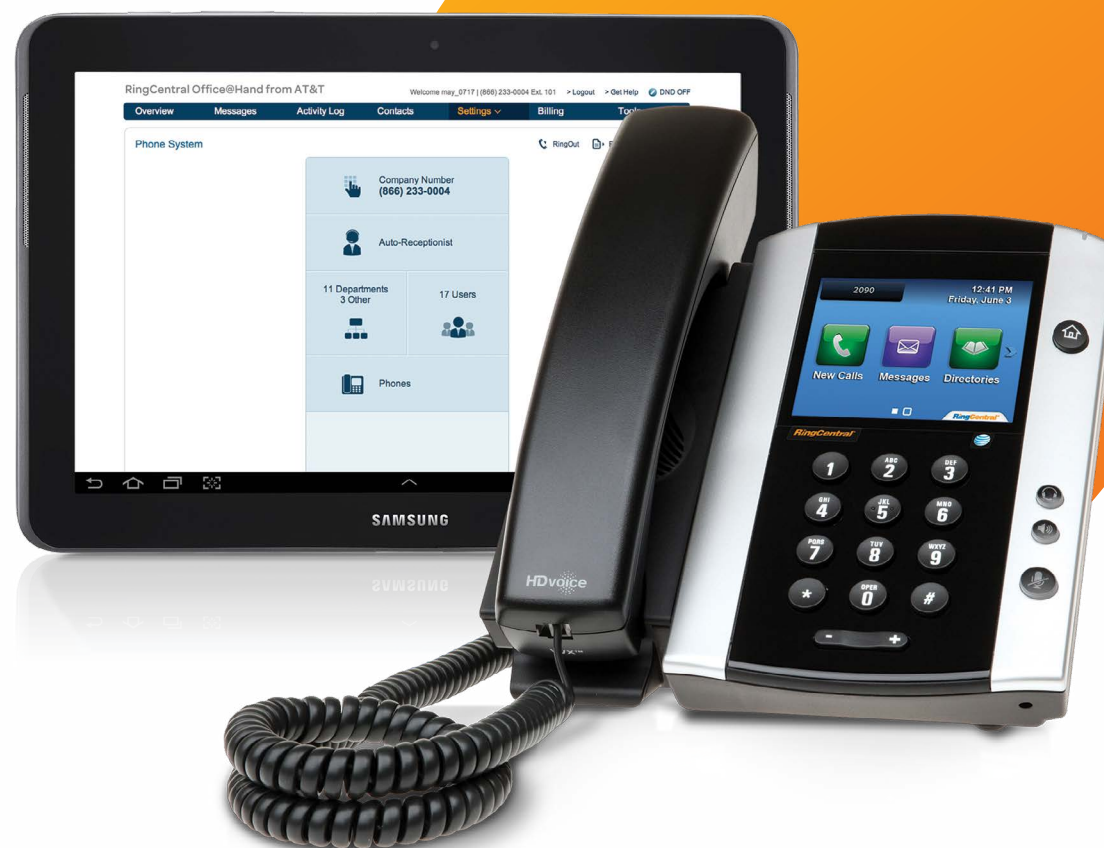
RingCentral

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Welcome to RingCentral Office@Hand from AT&T

Build a professional presence for your business, drive productivity, and unify all your employees in the office and out in the field with a single phone system integrating desk phones, mobile, and PC—with RingCentral Office@Hand from AT&T.

Office@Hand works with all mobile and fixed-line phones, and offers features such as an auto-receptionist, multiple extensions, voicemail, call handling, faxing, on-hold music, and more. With no setup fees or new hardware required, RingCentral Office@Hand from AT&T provides immediate savings over traditional business phone services.

Follow the steps in this guide to set up your phone system, add users and departments, and more. Activate your business phone system today and start taking calls in no time.

When you activate your account, the first time you log in as Administrator you are prompted to complete **Express Setup**. Follow the steps to perform a basic setup of your new phone system in just minutes. It will take you through setting up your Admin extension, setting up extensions for your other users, adding departments, and setting up company call handling.

Then use this guide to **update**, **change**, set up **additional features**, or **customize** your company's online phone system settings and those of your users.

As **Administrator/Account Owner**, you are able to set up and manage the extensions of all your users. Your users will also be able to fine-tune some of these settings for their own phones once you have set them up. In addition, those you designate as **Department Managers** can set up and manage the extensions of users assigned to their departments—see the separate Department Manager user guide for details.

The **RingCentral Office@Hand from AT&T Mobile Apps for smartphones** give you access to most of the same functions described here.

The Overview Page

Managing your account is done online, through your browser.

Log into your Online Account at http://service-officeathand.att.com using your main RingCentral phone number and password.

The **Overview** page is your account home page. It shows your recent calls, plus your account status and announcements. Let's take a look at the tabs across the top of this page and how to use them. Some features are described in more detail later in this document.

Messages

You will find your email and voicemail messages in the Messages menu, as well as call-recording messages.
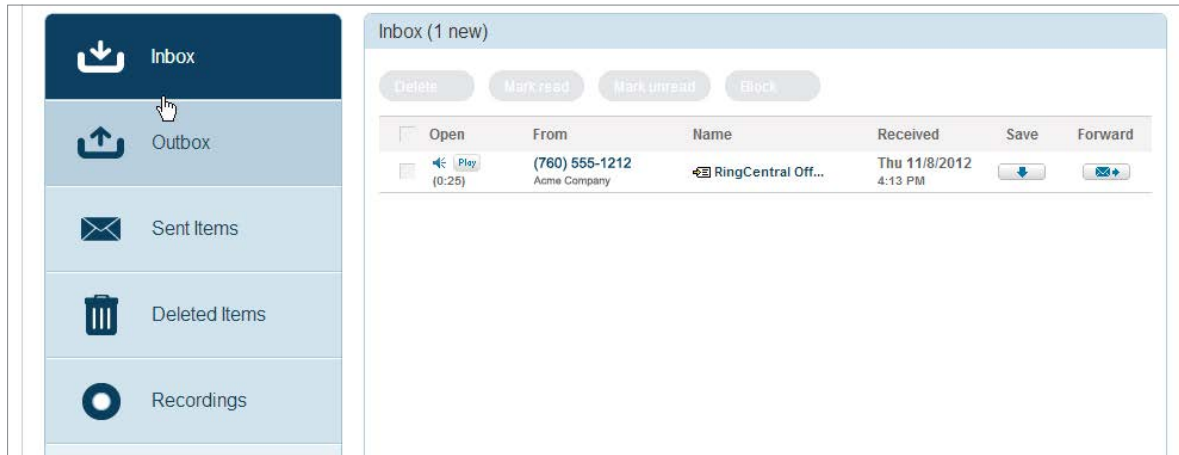
Your voicemail and fax messages are stored here for 30 days. Under Messages, you can:

- Review inbound and outbound **calls**
- Listen to **voicemail**
  - *Hover over* the word **Play**; the message will play back
- View **faxes**
- Listen to and manage calls you've **recorded**

- Save voicemail and received faxes **to disk**
  - *Click* on the word **Play** and respond to the pop-up dialog
- **Forward** messages and faxes by **email**
- Click on a caller's number to **call them back**
- Add callers to your **Contacts**
  - Click **Add Contact** and fill in the Contact form

- Delete and undelete items
  - Check the box for a message and click **Delete**
- **Block callers**
  - Check the box for a message and click **Block**

Activity Log

The Activity Log provides **customized 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. If you use RingMe for marketing, the **Activity Log can show you the URL** for RingMe calls you receive, so you can track the effectiveness of specific marketing campaigns.

You can **save** reports to disk for analysis; these reports You can have the activity log **delivered** to an email address daily, weekly, or monthly on specified days.

You can view, and download to a **spreadsheet** for analysis, information for your main number or for selected extensions.

Contacts

Contacts includes **Company** contacts, all the users of your RingCentral system. It also includes your **Personal** contacts, which you can add manually or import from your Microsoft Office account, or from a comma-separated variable (CSV) text file.

Settings
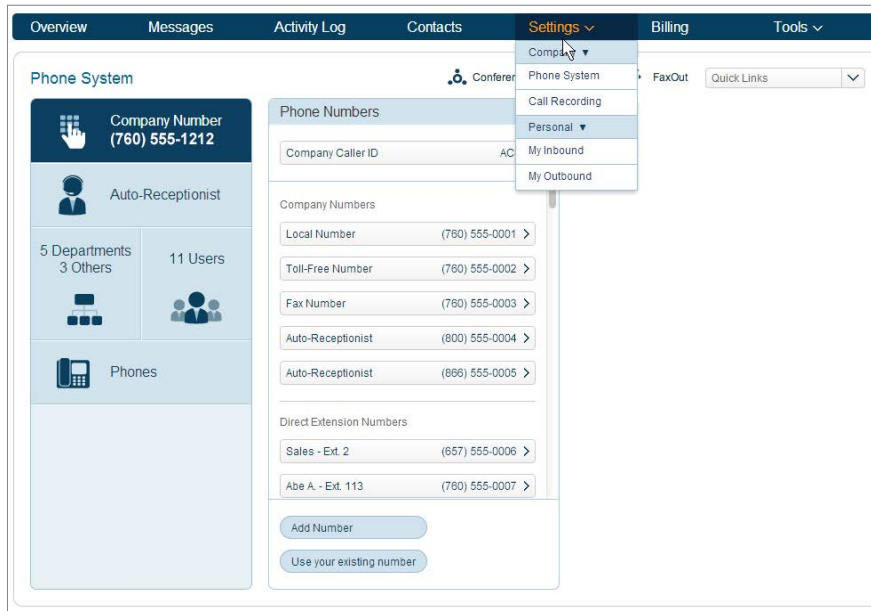
The Settings menu offers a rich set of management tools for the Administrator. Under **Settings > Company** you will find the **Phone System** menu, where you manage settings for the company number, the auto-receptionist including setting business hours, managing the dial-by-name directory, and determining how to handle inbound calls, as well as manage all the settings for your users. Also under **Settings > Company** is the **Call Recording** feature. The **Settings > Personal** submenu has all your own personal user settings.

Company > Phone System

The Phone System screen is where you will be making changes and updating your company's system settings, including adding new users or departments, defining the handling of incoming calls, and adding new phones.

Company > Call Recording

The Call Recording screen is where you define rules for users who choose to record their phone calls. You may also disable this function.

Personal > My Inbound

The My Inbound menu allows you to define your own user details, including name, email, and phone number. You can add phone numbers and define which numbers correspond to which devices such as your office desktop IP phone, your cell phone, and your home phone. Define call-screening rules and specifics for your personal number including on-hold music and personal greetings. You can specify the number of rings before the caller is sent to voicemail as well as the sequence of phones that will ring when calls arrive.

## Personal > My Outbound > Caller ID

Define the Caller ID customers will see when you call them. Your outgoing Caller ID can reflect a business name, a local number exchange, a toll-free number, or a blocked Caller ID.

Personal > My Outbound > Fax Settings

Choose a template for company outbound fax cover sheets here. You can also choose specific users who are permitted to send faxes via email.

Billing
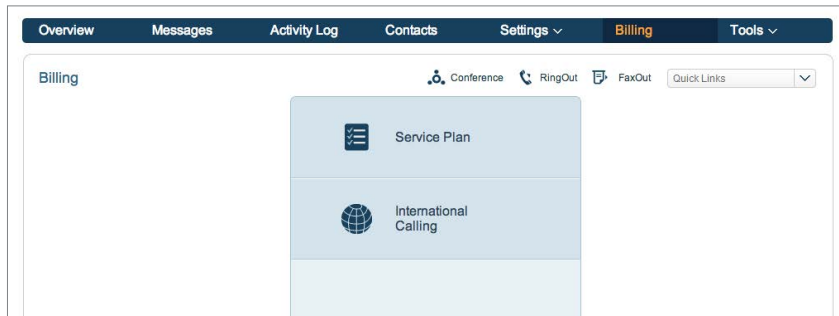
The Billing tab leads to menus for managing your Service Plan, and permissions for International Calling.

Review your Office@Hand service plan and costs. You can change your plan from this menu, including changing the number of Premium and Virtual users on your account. You can also set up Auto Purchase for international calling.
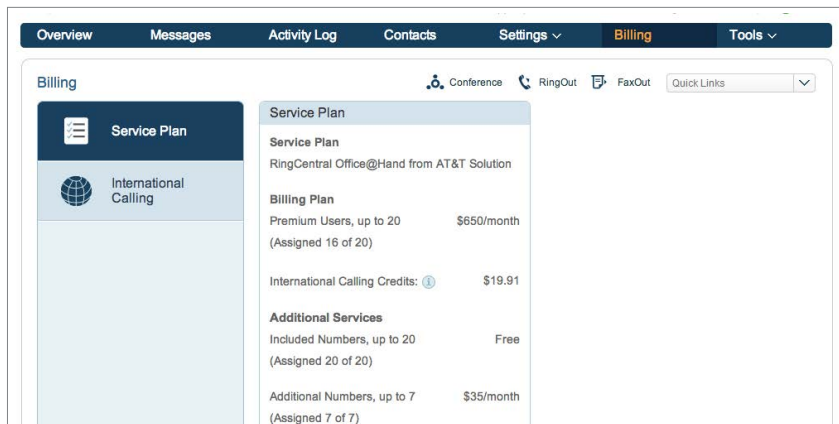
NOTE: **A Premium user** has access to all the capabilities of your phone system, including making both inbound and outbound VoIP calls from from the Softphone. A Virtual user can receive incoming calls on existing phones, and place and receive VoIP calls from their smartphone. Virtual users cannot use desk phones, or use VoIP to make calls from the Softphone.

Click the **Change Plan** button to manage your service plan, including the number of your Premium Users and Virtual Users.

Auto-Purchase: Per-minute charges for international calls (see next page) are not billed to your account. Instead, they are deducted from your prepaid Calling Credits account. Auto-Purchase ensures you will never run out of such Calling Credits. From this menu you can select a Calling Credits package of $20 or $100, which will be automatically renewed when you run low, thus preventing any interruption of service. Purchased funds will roll over month to month for up to 12 months. The price of international calls will vary according to the applicable international rate (see **International Calling** on next page).

International Calling
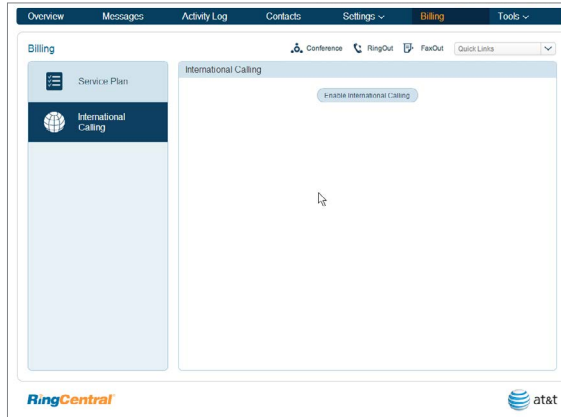
Calls your users make to countries outside the United States incur charges. To manage your costs, outbound International Calling is disabled by default. Your users will not be able to call out of the U.S. unless you enable International Calling.

On the **Billing** page, click **International Calling**, then click the **Enable International Calling** button to display and enable a list of all countries. You can enable or disable specific countries. The per-minute costs for outbound calls are shown for each country. (Callers from outside the U.S. can continue to reach your local (non-800) numbers regardless of your selection.)

International calls are paid using Calling Credits (see **Auto-Purchase**).
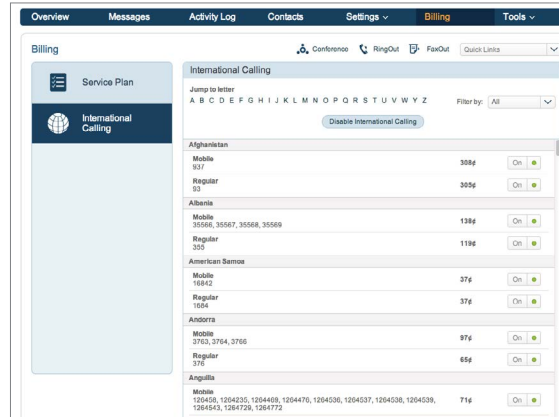
NOTE: Rates displayed in this menu are AT&T World Connect rates. Rates are subject to change.

Once you have enabled International Calling, you can give permission to your individual users to make international calls. From the main menu click **Settings > Phone System > Users** and at the bottom of the Users panel click **Edit Permissions.**

This pops up a screen listing your users.
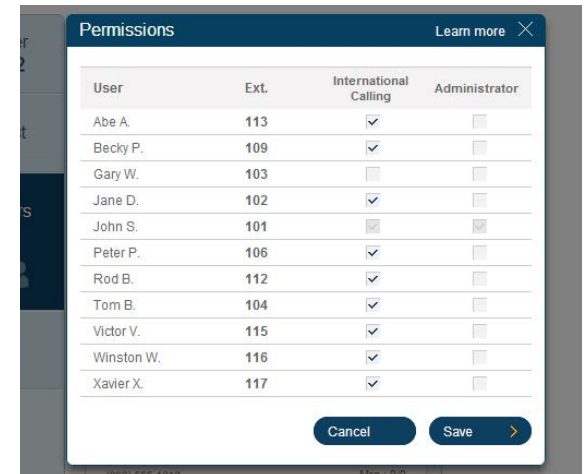
Check the names of your users you want to be able to make international calls to the countries you activated. Then click **Save**.

NOTE: This screen also lets you assign Administrator rights to other users. Such users have full Admin rights, except that they cannot delete the account owner, nor change the billing address and billing info settings.

Tools

This section allows you to obtain the latest tools to enhance your productivity and customize your service to suit the way you work.

Mobile Apps

Download the smartphone app to take your Office@Hand service on the go.

Softphone

Use Softphone application to control your calls from your PC. Answer or screen incoming calls, send to voice mail, transfer, disconnect, or monitor voice messages as they are being left and pick up the ones you want to talk to.

RingMe

The **RingMe** button gives your customers the ability to call you by clicking on the button on your web site or email signature.

Appearance

Customize your Office@Hand Service Site with your company logo.

Account Validation

Identity Validation is recommended as a security measure to protect your account. Set for you and all your users, it prevents unauthorized individuals from accessing account information by emailing a login code to you when you attempt to log in from a new computer. While it can be turned off, that is not recommended.

Resources > Online Support

Access the Office@Hand Support page at http://support-officeathand.att.com/ to review features and learn more about what your system can do. You can also contact our support team from this page.

Conference Calling

Conference Calling is available on Office@Hand Premium User Plans.

A single conference bridge phone number is provided for each account, shared by all users–no need for your users to keep track of multiple bridge lines. Each user gets their own individual host and participant access code, so they can hold conference calls whenever they want, wherever they are. Each user can host a conference with up to 1000 attendees, using their Desktop IP phone while in the office, or their Softphone on their desktop computer, or the Office@Hand mobile app while on the go. An Invite feature lets you send email invitations with the dial-in information to participants with just one click. As host, the user can mute participants, get caller counts, record conferences, and more.

Find your conference number, host code and participants code at the top of most screens when you are logged into the Web site.

To join a conference you are hosting, call the Conference number and enter your **Host number** at the prompt.

To join a conference hosted by someone else, call the Conference number and enter the **Participant cod**e at the prompt.

To invite participants to your conference, click the word **Invite** at the top of the Web screen. This brings up your default email program and starts an email message with the default Subject line **Details for conference call dial-in** and a standard message that includes the call-in information your guests will need. Edit the Subject and message as needed, enter your invitees in the To: line, and send the email invite containing the dial-in information.

The main conference number is available in the U.S. In addition, in-country dial-in numbers are available for use in over 30 countries.

For additional information including touch-tones to use for control during the conference, and a list of international dial-in phone numbers please visit this page: **Conference Calling Touch-Tone Commands and International Dial-In Numbers**.

Administrators can locate the unique conference calling information for a specific user by going to **Overview > Manage Users > [select a specific user] > Phones & Numbers**. At the bottom of this screen is the conference number, host code and participants code for that user.

Quick Links

On all but the Overview screen there is a Quick Links dropdown menu on the right that shows these shortcuts to most-used functions. The Administrator sees both Administrator and User links; Users see only the User links.

- **Administrator**
  - Manage Users
  - Company Call Handling & Greetings
  - Manage Phones
  - Manage Departments

- **User**
  - My Greeting & Call Screening
  - My Call Handling Rules
  - My Voicemail
  - My Caller ID
  - My After Hours Settings

These features are described in detail elsewhere in this document.

DND (Do Not Disturb)

On the upper right of every page of your online account is small button labeled **DND**, or Do Not Disturb. When set to **DND Off** it is green, and means that you will take all incoming calls.

Click **DND** to toggle **Do Not Disturb** to one of its two other settings. When **DND On** is orange, it is set to **Do not accept department calls** and callers from the user's department go to voicemail. When **DND ON** is red, it is set to **Do not accept any calls**, and all callers are sent to voicemail.

RingOut

The RingOut icon appears near the top of every online account page. Using RingOut lets you make calls through your RingCentral account from your Softphone on your PC or Macintosh computer. Such calls show up in your Activity Log, so you can include them in your call management. And you can take advantage of the many call-control features of the Softphone.

Click on the **RingOut** icon on any account page to bring up this menu pop-up.

RingOut works from your desktop computer by first calling your number, then calling the other party.

In this menu, in the **Call to** box, enter or select the number you wish to call. You can also choose from among recent calls, or from your contact list.

In the line **Current Location** should list your Office@Hand number; or you can choose **Custom phone number** and enter another phone number you'd like to use for this call instead.

Prompt me to press 1 before connecting the call is pre-checked: 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, because the call won't complete.

Now click **Call**. The system first calls you. When you answer (and press 1 as instructed), it then calls the other number and connects you.

Note that 911 emergency service is not available through the RingOut system.
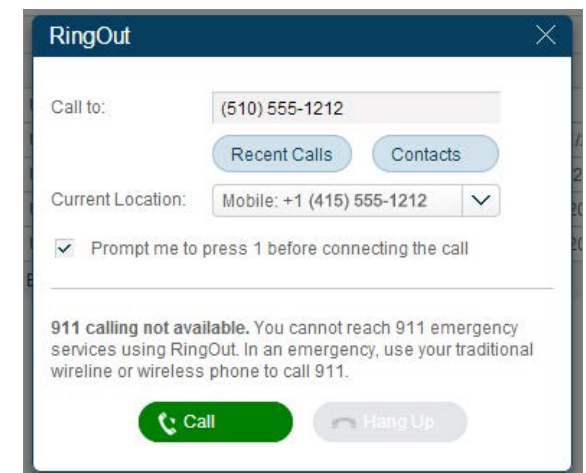
FaxOut

FaxOut makes it easy to send a fax from your desktop computer without needing a fax machine. Users click the **FaxOut** icon and fill in the simple form with recipient and cover sheet information, and can attach a document which will be converted into a fax automatically. A wide variety of standard document types are recognized by FaxOut. See **Faxing using FaxOut**.

Get Help

Click **Get Help** on the top right of the screen to access a comprehensive set of knowledge-based articles on every aspect and feature of Office@Hand.

The Phone System Screen

The Phone System screen, reached from the Overview screen, is the starting point for many of the Administrator operations described in this document. It is where you update, change, and customize your company phone system and user settings.

1. Log into your Online Account, at http://service-officeathand.att.com, using your main number and password.

2. From the main menu, click **SETTINGS**.

3. From the **Settings** dropdown menu, under **Company**, select **Phone System**.
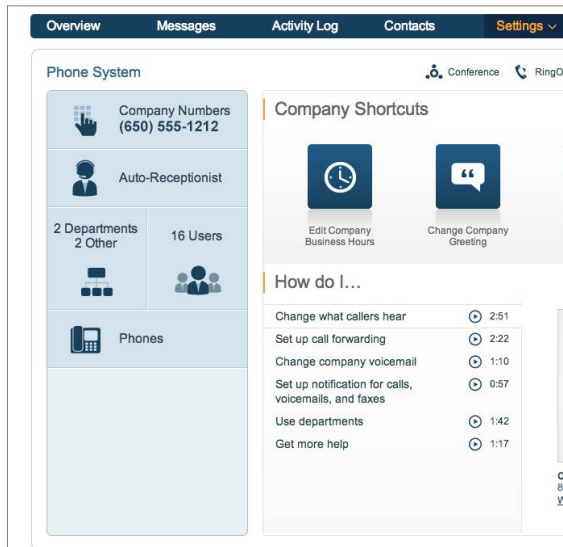
Company Settings

Company Number

Adding additional company numbers to your RingCentral account is simple. You can 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. Note that each RingCentral number functions as a voice and also as a fax line for incoming calls—the system automatically detects incoming faxes. This means that you can use a single number for both calls and faxes, simplifying customer communications.

Company Caller ID

This is the information that appears as your Caller ID when making outbound calls. Your company name appears as the default. You can edit this field; maximum is 15 characters. (Changes to this Caller ID field can take a week or more to take full effect.) This Caller ID appears when making calls from one of your local numbers. Calls from your toll-free number will only display the toll-free number as the Caller ID.
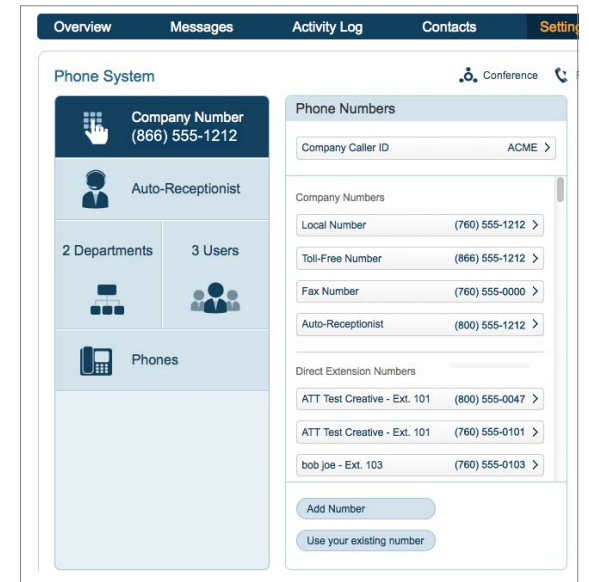
Adding a Company Number

1. From the **Phone System screen** *(Settings > Company > Phone System)*, click **Company Number**.

2. Click the **Add Number** at the bottom of the middle panel.

3. Using the **Number Selector**, click the corresponding tab to add a local, toll-free or vanity number.

4. Select the tab **Option 1: Local Number**, provide City or Area Code, and choose from among the available numbers

5. Select the tab **Option 2: Toll Free Number**, choose which toll-free prefix you wish — note that a one-time charge of $30 applies to use the prefix **800** — then select from among the available numbers.

6. Select the tab **Option 3: Vanity Number**. A vanity number is an available combination of letters, numbers, and symbols, which you choose because its numbers or letters are significant, related to your business, easy to remember, or spell out a message.

7. Enter the numbers or letters you wish to use and click **Search** to see if this combination is available. You can use the wildcard character * to help with your search. Note that a one-time charge of $30 applies to use the prefix **800**.

8. For each of the above selections, once you choose a number, click **Next**, then select whether to have this number connect to your Auto Receptionist, or to a specific extension you choose on the next screen.

Using Your Existing Number (Porting/Transferring to RingCentral Office@Hand)

If you or one of your users have an existing phone number that you want to keep, you can choose to either **transfer (port)** the number to Office@Hand, or you can have calls to that number under another provider **forwarded** to Office@Hand account. See below for details on each method. These steps also apply to your users who wish to transfer their numbers to Office@Hand.

Important Note About Number Porting!

Number porting is the transfer of a phone number from one carrier to another at the request of a customer.

It lets customers take their phone numbers with them when they change carriers. When you sign up for your RingCentral Office@Hand from AT&T account, talk with the sales representative about porting your numbers. You will be contacted by a **RingCentral porting specialist**, who will assist you in submitting your porting request to your current carrier. Porting takes time to process and mistaken information or incomplete steps can delay successful porting of your number further. So it is important that you work with your porting specialist to ensure a successful and timely transition.

NOTE: If you experience a porting problem while following the steps below, contact the RingCentral porting team via email at **OfficeatHandPorting@RingCentral.com** or call AT&T Support at **1-888-388-1058** 10am to 7pm EST, Monday through Friday for Porting-related issues.

How the Porting Process Works

1. Your or your user submit a port request from their Office@Hand online account. (See steps on following pages.)

2. The port request is forwarded to your current service provider.

3. The Porting department of the service provider sends you email with an Estimated Completion Date (ECD). (If the porting request Authorization is rejected, the user will get an email advising you.)

4. The Porting department sends you a Firm Order Completion (FOC) date sometime between four and ten days after receiving your porting request.

5. About two weeks after the request, you should get an email from the Porting department stating that the number was successfully ported.

NOTE: It usually takes 10-20 business days to port your number, but the process is often faster. Providing accurate information on your request form speeds it up.

Dos and Don'ts for Successful Number Porting

1. Do be exact. Information must match exactly what is on record with the current phone service provider. If it doesn't, the porting will be delayed. Review the current bill or contract for accurate details.

2. Don't cancel the old phone service: Wait until after the port is complete to cancel the old service.

3. Don't lose DSL service: Call your service provider to get a new phone number for your DSL line before submitting a port request, or you will lose your DSL.

4. Do remove special features from your current service. Call your provider to cancel special features such a Centrex, remote call forwarding, or distinctive ring, before submitting the port request. Only cancel the features – not the entire phone service.

5. Do cancel any open pending service orders, or confirm that they are completed before placing your port request.

A Porting Getting-Started Checklist

Here are a few things you need to get started.

- A recent phone bill; make sure it's current—less than 30 days old.

- Your service address – the address where your phone rings. This may or may not be the same as your billing address.

- The main Billing Telephone Number – find this on the phone bill.

- Phone Numbers: Depending on the type of phone number you are porting:

  - Mobile number: You will need to provide the Account Number and PIN. If you can't find them, contact your cellular provider.

  - Toll-Free number: You will need to fax or email a recent phone bill. You will also need to fill out and hand-sign a Letter of Authorization form.

  - Local number: You will need the Billing Telephone Number (BTN) for each number you want to port.

- Upload the Letter of Authorization (LOA) (see Step 9) and COB from your account if you are porting a toll-free number.

The Porting Process Step By Step

Before you begin the porting process, make sure you have a copy of your latest bill handy and allow for extra time to complete the porting as this process can be time intensive. If you're porting more than 20 numbers, please contact officeahandporting@ringcentral.com for additional assistance.

STEP 1

Log in to their Office@Hand account at: http://service-officeathand.att.com. After logging in to your account, choose the Settings menu and select Phone System.

STEP 2

In the phone system menu screen, select Company Number. At the bottom of the Phone Numbers menu, select **Use your existing number**.
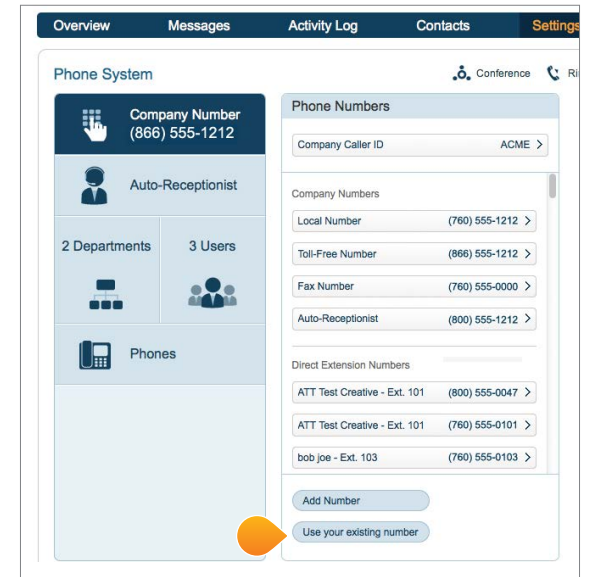
STEP 3
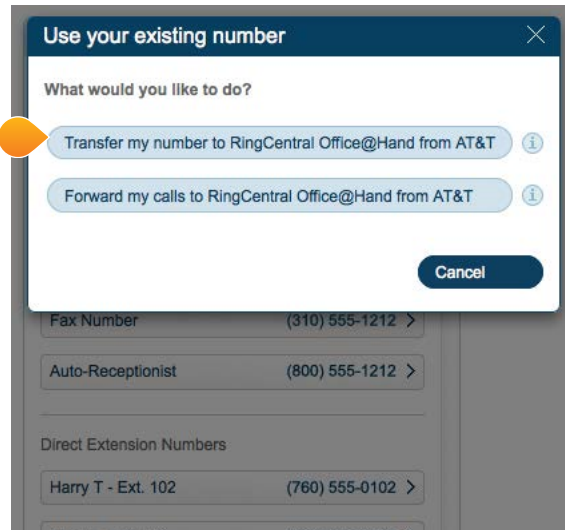
From the pop-up menu, select **Transfer my number to RingCentral Office@Hand from AT&T**.

STEP 4

Confirm the pop-up that explains that porting numbers might affect your Office@Hand plan.

STEP 5
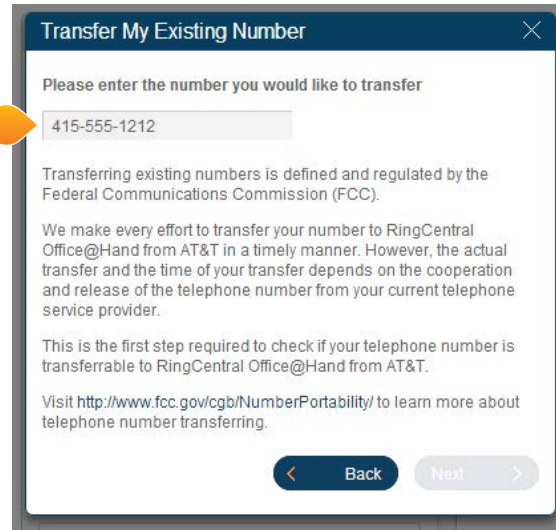
Input the phone number you would like to have transferred and click **Next**.

NOTE: This step will need to take place for **each number** you would like to transfer. If you're porting more than 20 numbers, please contact **officeahandporting@ringcentral. com** for additional assistance

STEP 6
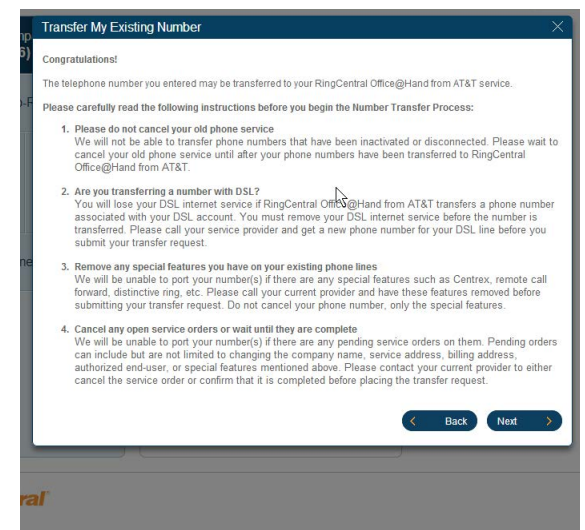
Once your number is accepted for porting, read the instructions and click **Next**.

STEP 7

Enter the information and service address associated with your existing toll free number. Click **Next**.

STEP 8

Review the information you entered in the previous step. You may change any incorrect information by clicking **Back**. If the information is correct, click **Next**.

STEP 9

If you are porting a **toll free number**, you will be instructed to download, print and sign a **Letter of Authorization (LOA).** You will be able to send the signed LOA and a copy of your latest telephone bill (not older than 45 days) **by fax** to the number indicated, or send it **by email** to the address indicated, or use the **upload mechanism** on the
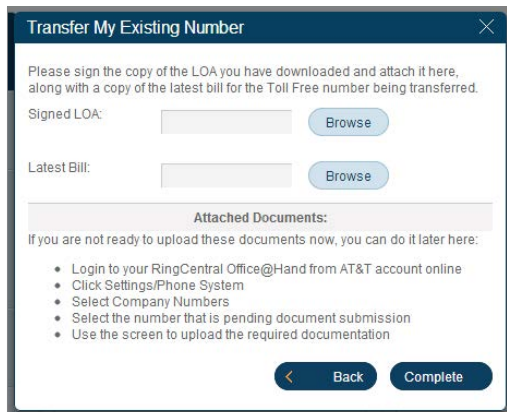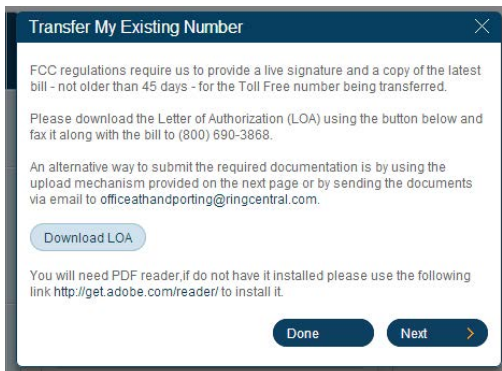
STEP 10

If you are transferring a **non-toll-free number**, the **Letter of Authorization** will be displayed on screen with the information you provided filled in. If the information is correct, check the 'I Agree' box, then click **Next**. (You can also print a copy for your records.)
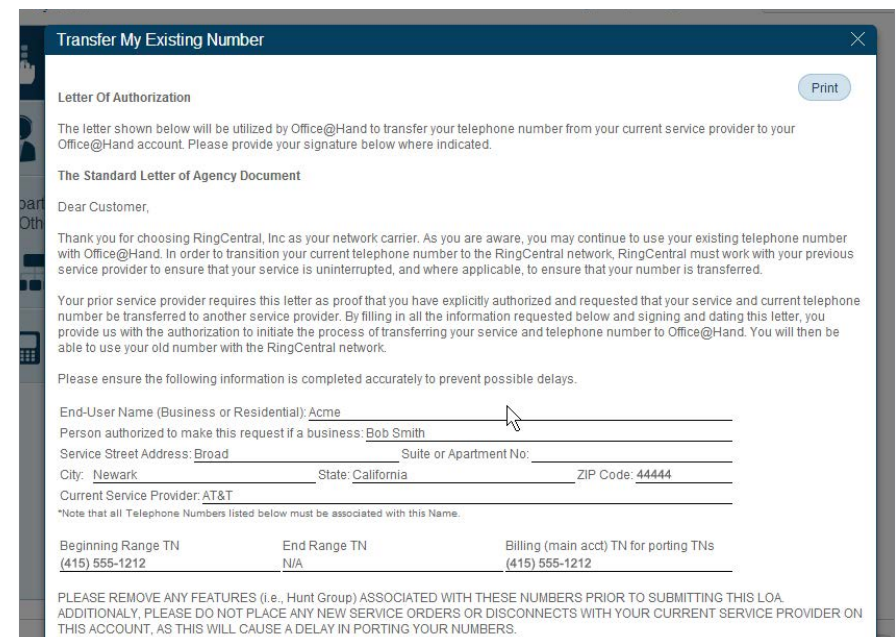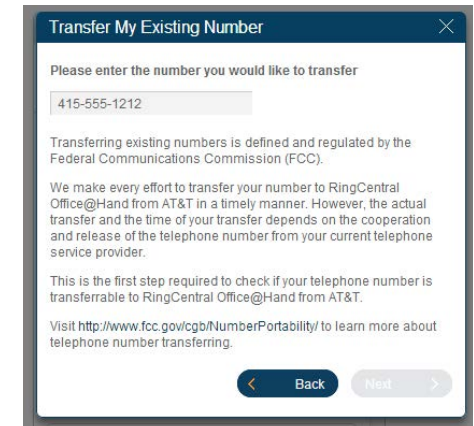
STEP 11

The next screen gives you instructions about the porting process, including the warning not to disconnect your existing phone service until the porting process is completely finished. Review this screen, then click **Complete**.

NOTE: If you decline the Electronic Records & Signatures feature, you will need to download, print, fill and sign the form provided, then upload it using the **Upload button** (see the screen on the right) before RingCentral can process your number transfer request. (In the rare case when the upload is not possible, fax the above document along with a copy of the recent invoice listing the end-user name, address and all numbers requested to be ported to (800) 690-3868 and follow up with an email sent to **officeathandporting@ringcentral.com** notifying us about the faxed documents.)

Transfer My Existing Number

Print

Thank you! We will now process your transfer request.

Transferring typically takes between 2-14 days (but occasionally up to four weeks), and depends on your current telephone service provider. The transfer date depends on your current telephone service provider releasing the number. Your number will be available for use within 24 hours of its release.

To ensure the proper handling of your number transfer:

- Contact your current telephone service provider and make sure you don't have any holds on your account.
- Do not place an order to disconnect your service with your current telephone service provider until the phone number transfer completes and is in use with RingCentral Office@Hand from AT&T for at least one week.
- Contact your current telephone service provider to cancel any additional telephone services associated with your number, such as call forwarding, hunt groups, voicemail, etc.
- Contact your current telephone provider and cancel any pending orders if you have submitted any.
- Notify your current telephone service provider if you have any other phone numbers associated with your current billing telephone number (BTN) that you are not porting, and have those numbers switched to a different BTN.

We will notify you and help you resubmit your case if your current telephone service provider denies the transfer. Otherwise, we will send you an email notification once the process is complete, or when your current telephone service provider updates us with more information.

You can find the current status of your number transfer request under **Settings -> Phone System -> Company Number**.

If you have any questions, contact us at (866) 555-1212.

Complete

If your number cannot be transferred

Some numbers from some local providers cannot be transferred using our automated system. You will see an instructional message titled **Transfer Existing Number: We're Sorry!** You can still go to your local service provider and use their process to forward this number to your RingCentral line.

If your number can be transferred

You will see a message titled "Congratulations!"

RingCentral®

NOTE: The date for transferring your number depends on your current telephone service provider releasing the number. Transferring typically takes from between 2-14 days (but occasionally up to four weeks) and depends on your current telephone service provider. You can check the status of your number transfer under **Settings > Phone System > Company Numbers** (see screen) where you will see a section titled **Pending Numbers** (scroll down the Phone Numbers section).

NOTE: If you experience a porting problem while following these steps, contact the RingCentral porting team via email at **OfficeatHandPorting@RingCentral.com** or call 1-888-388-1058.

Forwarding Calls from Your Other Provider to Your Office@Hand Service

If you have a company phone number with another provider, you can have calls to that number forwarded to RingCentral when that line is busy or you do not answer.

1. Click **Settings > Phone System > Company Number** and at the bottom of the middle Phone Numbers column, click **Use your Existing Number**.

2. Click **Forward my calls to RingCentral**.

3. Enter your existing outside number you would like forwarded to RingCentral.

4. Select where the calls from the number will be forwarded: **Company Auto-Receptionist** or **Extension**.

   If you choose Extension, then choose one of your current extensions from the displayed menu.

5. Confirm the phone number and click **Done**.

   You may see a screen asking you to select your service provider for this number; if so, choose your service provider from the drop-down menu, then click **Next**.

7. If you are forwarding a land line, or certain mobile phone lines, you will now see on-screen instructions for calling your current carrier to request enabling of **busy or no answer forwarding**. If you are forwarding a mobile phone number, in most cases you will see on-screen instructions to dial the displayed number on the mobile phone you want forwarded; this instructs the carrier to forward this mobile phone number when busy or unanswered.
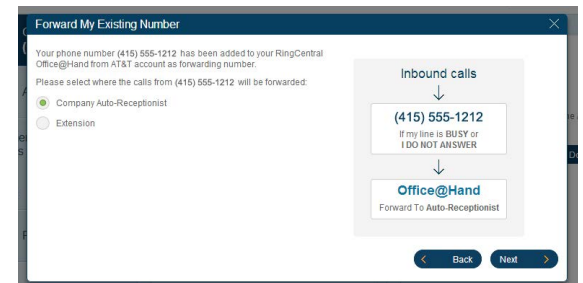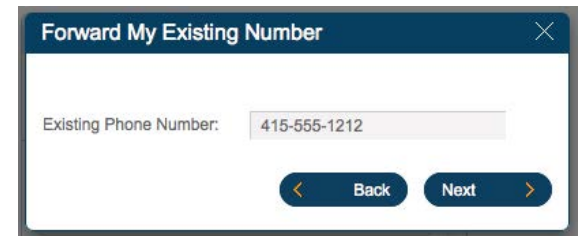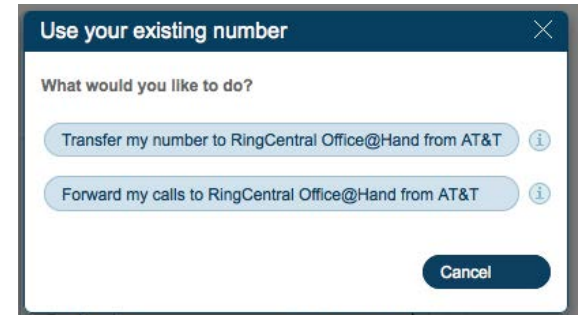
Fax Settings

A dedicated company fax number should have been assigned to you, and set up, during your signup process. RingCentral will receive faxes on your company fax number and route them to a specified extension inbox, which the recipient can view and forward from the **Messages** tab on their RingCentral online account.

Once your company fax settings are established, your users can send faxes out via the FaxOut feature, through their computer Softphone application, or via email.

Your Company Fax Number

You will have only one Company fax number. You cannot add a second Company fax number. Remember, though, that each Office@Hand number on your account is also able to receive faxes as well as phone calls; and you can add Department fax numbers. See more on this, in the Department section.

If you wish to *change* your Company fax number, you can do so by following the steps below to delete your existing Company fax number, then select a new one.
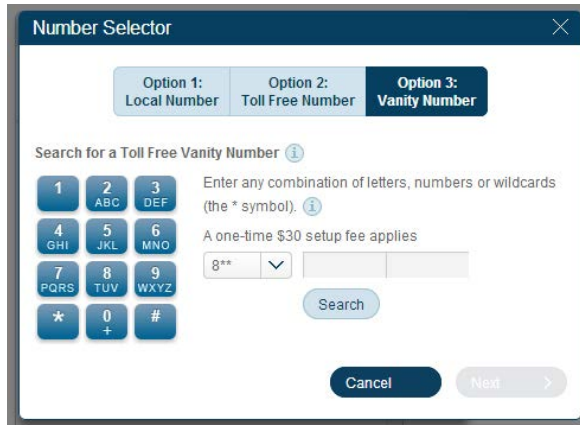
1. From the **Settings > Company > Phone System** screen, click **Company Number**.

2. Click the **Fax Number** bar.

3. On the **Fax Number panel**, to the right, delete your existing fax number by clicking the trash-can icon to the right of the fax number.
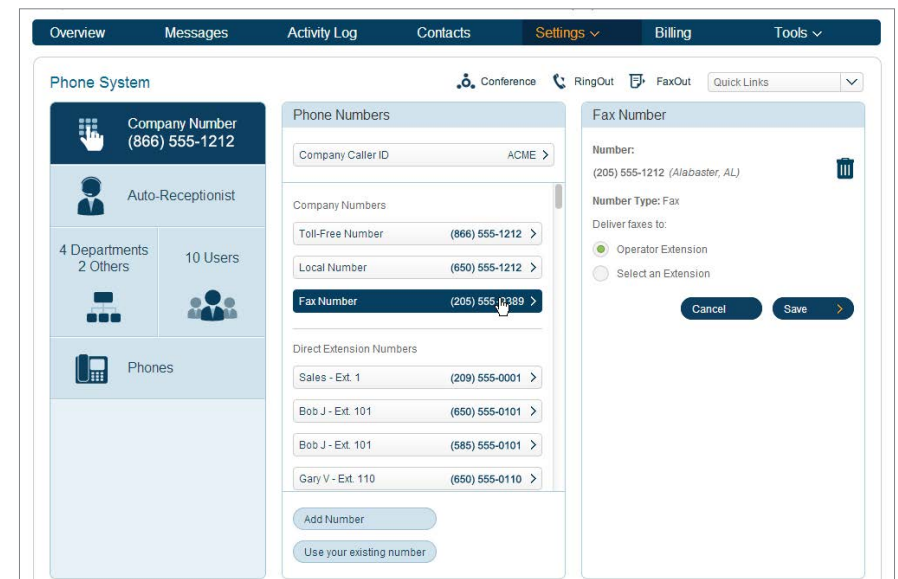
4. The Fax Number panel on the right will disappear. On the **Phone Number** panel in the middle you will see a new option: **Add Company Fax Number**. Click this bar.

5. Using the **Number Selector**, click the corresponding tab to choose to make your Company fax number a local, toll-free, or vanity (customized) number.

6. If you select the tab **Option 1: Local Number**, provide City or Area Code, and choose from among the available numbers. (If no number is available in that City or Area Code, select another City or Area Code.)

7. If you select the tab **Option 2: Toll Free Number**, choose which toll-free prefix you wish -- note that a one-time charge of $30 applies to use the prefix **800** — then select from among the available numbers.

8. **Option 3: Vanity Number**: A vanity number is an combination of letters, numbers, and symbols., which you choose because its numbers or letters are significant, related to your business, easy to remember, or spell out a message.

9. Enter the numbers or letters you wish to use and click **Search** to see if this combination is available. You can use the wildcard character ` * ` to help with your search. Note that a one-time charge of $30 applies to use the prefix **800**.

For each of the above three options, once you choose a number, click **Next**. You will be returned to the Phone Numbers panel, where you will see your newly selected Company fax number displayed.

Note that, since you can only have one Company Fax number at a time, once you have a Company fax number set up, the Add Fax Number button is no longer displayed.

To manage **how your inbound faxes are handled**, from the **Phone Numbers** menu, click the **Fax Number bar**. On the menu that appears showing your new fax number and its location, select to have faxes delivered to the **Operator Extension** (the extension chosen to act as the Operator number for your company) or **Select an Extension** to choose another extension for fax delivery. The extension you choose will have inbound faxes delivered to it, and can be retrieved from the Messages area of the person who is assigned to that extension.

More About Fax Numbers

Although you can have only one official Company fax number, you are not limited in your inbound fax capabilities.

- Every extension automatically accepts and handles incoming fax calls, by default.

- You can add dedicated Department fax lines.

- You can specify the Number Type – Voice only, Fax Only, or Voice and Fax – for any given extension by going to **Settings > My Inbound** and clicking **Phones and Numbers**. Then select a **Direct Number**, and in the panel that appears click on the bar **Number Type**. You can select **Voice and Fax, Fax Only**, or **Voice Only** for each number. This selection controls what activity the phone number can receive.

Choosing a Default Fax Cover Sheet

A cover sheet is attached to each fax you send through Office@Hand. To select the style or look of your cover sheet, go to **Settings > Personal > My Outbound > Fax Settings**, click **Cover Page**. From the drop-down list, preview available cover pages, select the cover page you want, and click **Save**. The variable information on the cover page will be filled in during the fax-sending process.

Omitting the Cover Sheet When Email Subject is Blank

In **Settings > Personal > My Outbound > Fax Settings**, if this option is selected, when you send a fax via email with a subject line, the cover page will be used; if you send it without a subject line, a cover sheet will not be used.

Specifying Email Address That Can Send Faxes

In **Settings > Personal > My Outbound > Fax Settings** click **Faxes Sent via Email**. Under **Email addresses permitted to send faxes** add, one by one, the email addresses from which users can send faxes by email through your account with Office@Hand. Emails might include alternate company accounts or personal accounts. You can have up to five such approved emails.

When a user sends a fax via Office@Hand, the system checks the email address of the sender, and sends the fax if it is on this approved list. See **Sending faxes via email**, for details.

Sending Faxes

Here are three ways to send a fax using Office@Hand, without needing a fax machine.

Faxing using FaxOut

From any page on your Office@Hand 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 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. Send faxes to individuals by entering their fax number, or choosing individuals or Groups from your Contacts list. For Groups, the fax will be sent to each member for whom you have a fax number listed.

You can send the fax immediately, or schedule it to be sent at a future date and time.

Send faxes to individuals by entering their fax number, or choosing individuals or Groups from your Contacts list. For Groups, the fax will be sent toe ach member for whom you have a fax number listed.

Faxing using the Softphone

Open your computer desktop-PC Softphone and click the icon for **Create** and send a fax (the fourth icon from the top left).

Fill in the form that pops up, with recipient's fax number and cover page information, and attach a document, which will automatically be converted into a fax.
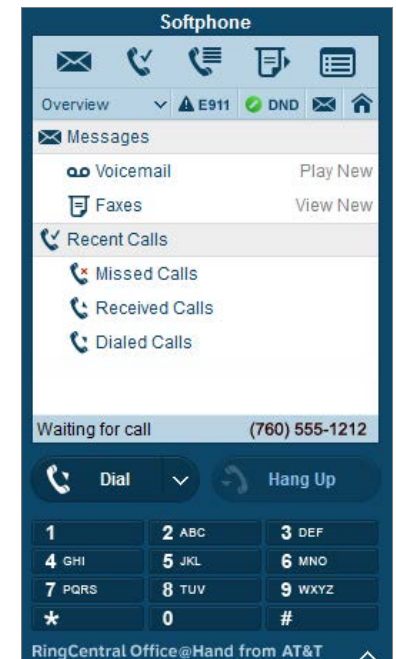
Faxing via Email

You can send faxes by emailing them as attachments to an Office@Hand email address that automatically converts the attachments into fax format and sends them to the fax number specified. You can send faxes by email in this way from any email address you have added to the **Faxes Sent via Email** menu described above.

1. Attach to an email the document you wish to fax.

2. The text in the *Subject Line* of the email will be added to the cover sheet. (If no subject line text is included, the cover sheet will be omitted.)

3. Send the email to the recipient's 10-digit fax number to the email address **rcfax.com**.

For example, to send a document to the fax number *1-510-555-1212*, you would use this email address: **5105551212@att.rcfax.com**

Here is how it would look:
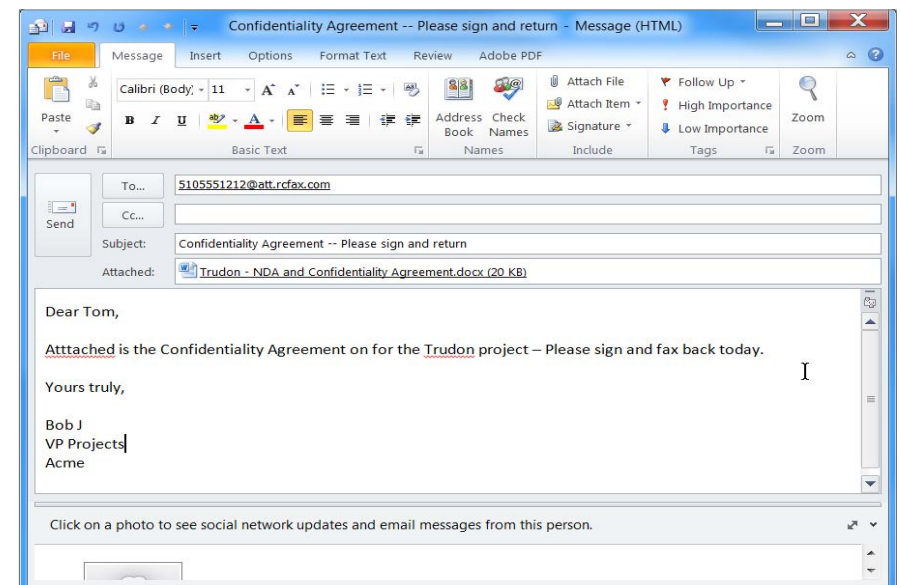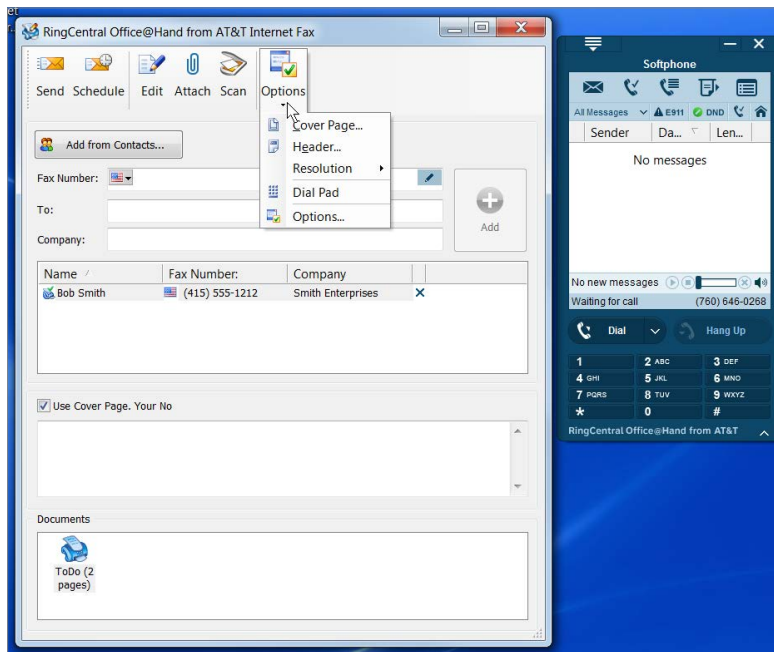
Auto-Receptionist Settings

Your Auto-Receptionist is your company's automated greeting that plays for all callers who dial your main company number. It greets callers and directs calls to the appropriate departments or employee extensions. You can customize your Auto-Receptionist to route calls based on the Business Hours and After Hours schedule that you define. You can have all callers hear your company greeting or route calls to a specific extension.

Setting Company Business Hours

You can set your company's business hours to 24 hours or customize your hours of operation by day. This establishes the settings for the Business Hours and After Hours tabs in other settings areas.

1. From the **Phone System** screen, click **Auto-Receptionist**.

2. Select **Business Hours**.

3. Set your Business Hours to **24 hours** to have incoming calls handled the same way all the time.

4. Set your business hours to **Specify Hours** and specify business hours for each day of the week. This lets you set separate call-handling rules and greetings for Business Hours and After Hours.

5. Set the **Time Zone** for your company's business hours.

6. Click **Save** once done.

Business Hours

Business Hours:
- 24 hours
- ● Specify hours

Business Hours:

Monday	9am - 6pm >
Tuesday	9am - 6pm >
Wednesday	9am - 6pm >
Thursday	9am - 6pm >
Friday	9am - 6pm >
Saturday	Closed >
Sunday	Closed >

Time Zone:

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

Cancel   Save >

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Regional Settings

Add a time zone, time format, and home country area code at the User or Company level.

To set regional settings for the Company:

1. Go to **Settings > Phone System > Auto Receptionist**
2. Click on **Regional Settings**
3. In the new panel, choose your
   - Time Zone from the drop-down list;
   - Time Format of 12 h am/pm (or) 24 h;
   - Home Country Code from the drop-down list.
4. Click **Save**.

To set regional settings for individual Users:

1. Go to S**ettings>Phone System >Users** and select a User.
2. In the User Info panel, select Regional Settings.
3. In the pop-up window, choose a
   - Time Zone from the drop-down list;
   - Time Format of 12 h am/pm (or) 24 h;
   - Home Country Code from the drop-down list.
4. Click **Save**.
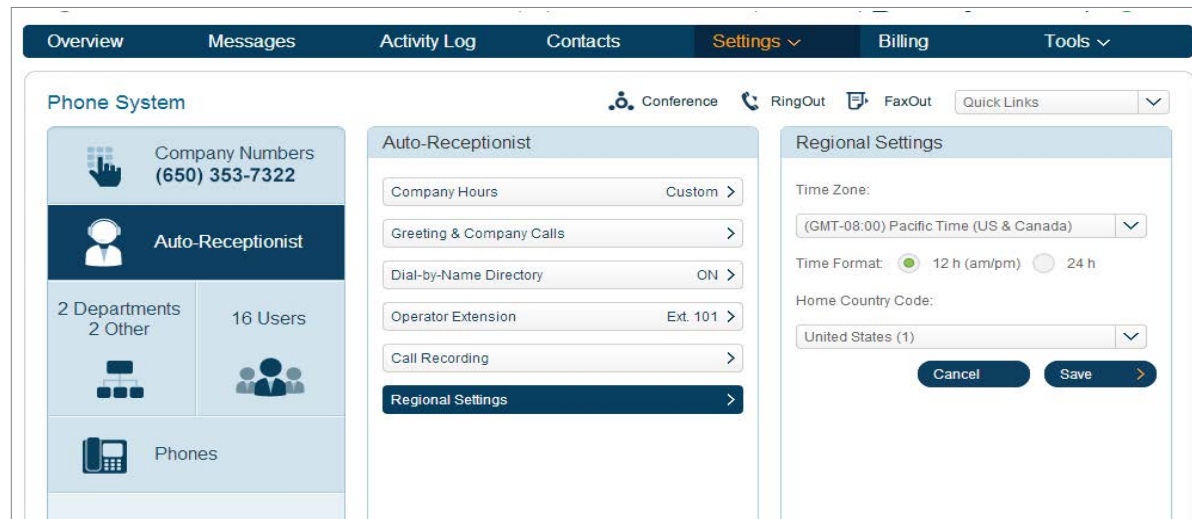
How to Handle Incoming Company Calls

Office@Hand lets you decide how to greet and route incoming company calls during your company's business hours and after hours.

1. From the **Phone System** screen, click **Auto-Receptionist**.

2. Click **How** to handle incoming calls.

3. Select the **Business Hours** tab (if available).

4. Select **Play company greeting** if you'd like callers to hear a default or custom greeting. You can then select to play the default greeting, or create a custom greeting on the next screen. (See instructions.)

5. Or select **Connect directly to extension** to bypass the Auto-Receptionist and connect calls directly to a specific extension,

6. Under **If caller enters no action**, you can select **Connect to operator** (extension 0). Or select Disconnect to automatically disconnect callers after the greeting is played three times with no action by the caller.

7. Select the **After Hours** tab to set call handling for after hours. (If you have Business Hours set to **24 hour** you will get a pop-up message when you select the After Hours tab offering to let you change your business hours.)

8. Click **Save** when done.
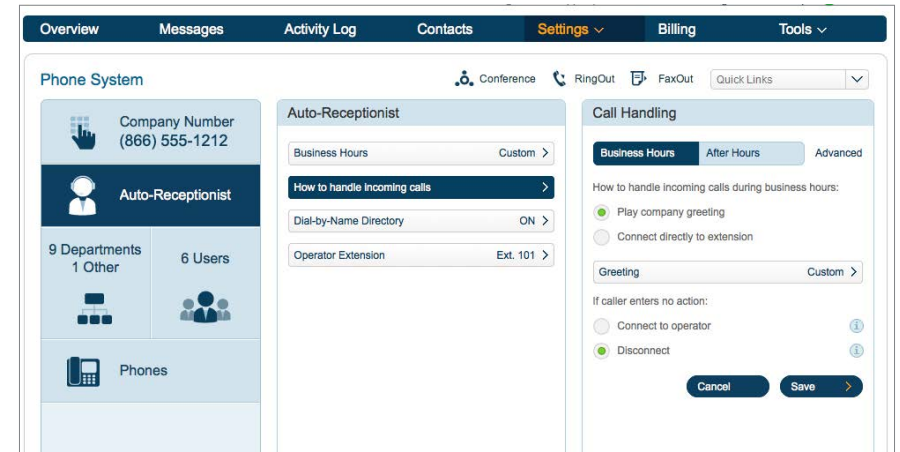
Company Greeting

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 review the script of this default greeting from the Call Handling screen).

Follow these instructions to create a custom company greeting, using your phone or uploading a prerecorded greeting file from your computer.

Record your Company Greeting from your computer

1. Tap Custom
2. Record using computer microphone
3. Tap Allow when prompted
4. Tap Record to start recording
5. Stop Recording and the greeting will be uploaded and applied
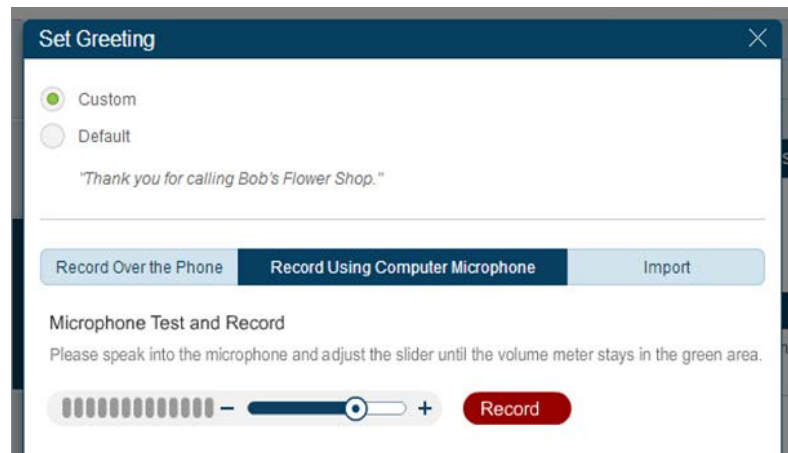
Recording your Company Greeting over the Phone

Follow these steps to record a new company greeting through your telephone.

1. From the **Phone System** screen, select **Auto-Receptionist**.
2. Select **Greetings & Company Calls**.
3. Select the **Company Hours** or **After Hours** tab.
4. Select **Play company greeting** button.
5. Click the **Greeting** bar.
6. Select **Custom**.
7. Click the red **Record** button.
8. Select or enter your phone number in **Call me at** and press **Call Now**.
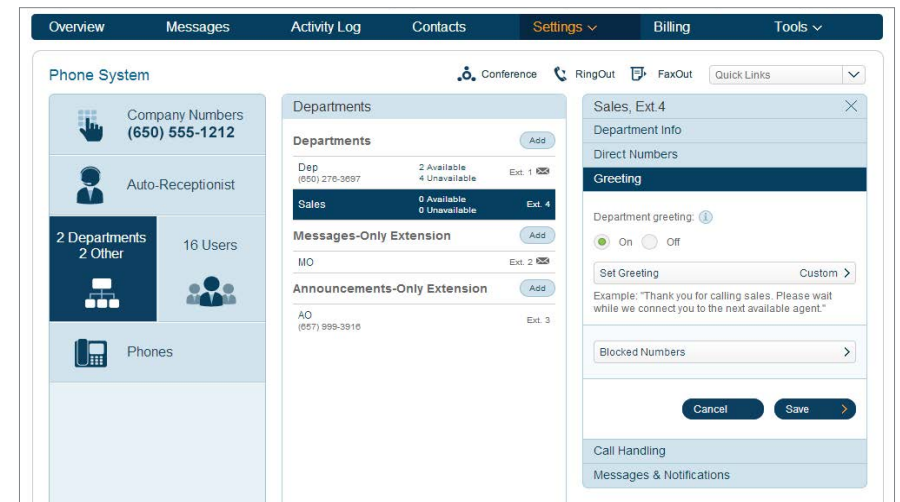
9. Office@Hand will call you and prompt you to record your greeting.

10. Once the greeting is recorded, you can listen to it by pressing **Play**.

11. If you want to re-record, press the **red button** again.

12. Repeat this process for the **After Hours** tab.
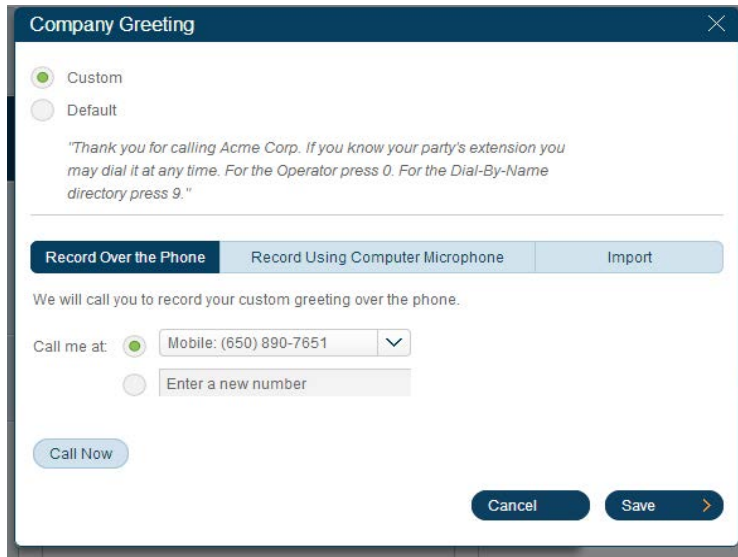
Downloading Your Custom Company Greeting

To download an existing Custom Company Greeting, click on the green download button, which is displayed when you have a saved a custom greeting. The greeting will be saved as a .WAV file to the local drive of your computer

Uploading a Company Greeting from Your Computer

You can upload a pre-recorded company greeting from a file on your computer.

1. From the **Phone System** screen, click **Auto-Receptionist**.

2. Select **Greetings & Company Calls**.

3. Select the **Business Hours** or **After Hours** tab (if displayed).

4. Select **Play** company greeting.

5. Click the **Greeting** bar.

6. Select **Custom**.

7. Click **Import**.

8. Click **Browse** and select a .WAV or .MP3 file from your computer.

9. Click **Open**, then **Attach**. (An error message will alert you if you select a a non-.WAV/non-.MP3 file.)

10. Click **Save** when done.
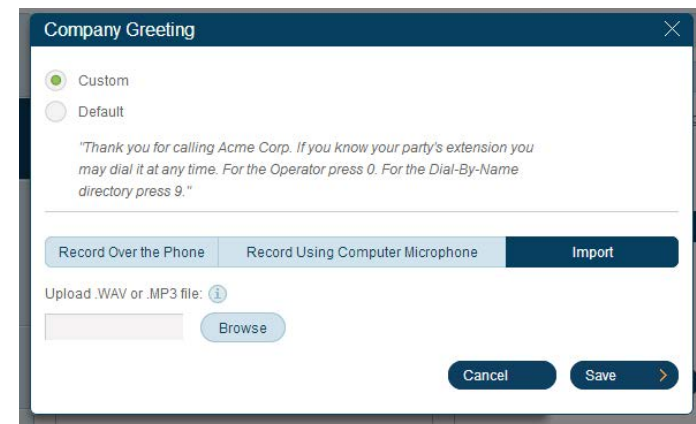
Company Dial-by-Name Directory

The Dial-by-Name Directory allows callers to find user and department extensions by spelling out the name on their phone keypads. Follow these steps.

1. From the Settings screen tap **Phone System**, then **Auto-Receptionist**.

2. Tap **Dial-by-Name Directory**.

3. Tap **On**.

4. Click **Extensions in Directory**.

5. Deselect any extensions to be excluded from your company's Dial-by-Name Directory. This list includes both user extensions and department extensions.

6. Select as the **Directory Extension** a number that is not already in use as an extension. This will become the number callers will tap to get to the dial-by-name directory.

7. Select to search by **First Name** or by **Last Name**.

8. Click **Done**.

When **Dial-by-Name Directory** is **On**, callers will hear a recording that, in addition to telling them to dial an extension, also suggests they can dial the Directory Extension number in order to locate a user by name. When callers tap the Directly Extension, they are instructed to use their phone keypad to spell out the first three letters of the first name, or of the last name, of the person or department they wish to call. The system will connect them, or offer additional options if there is more than one choice.
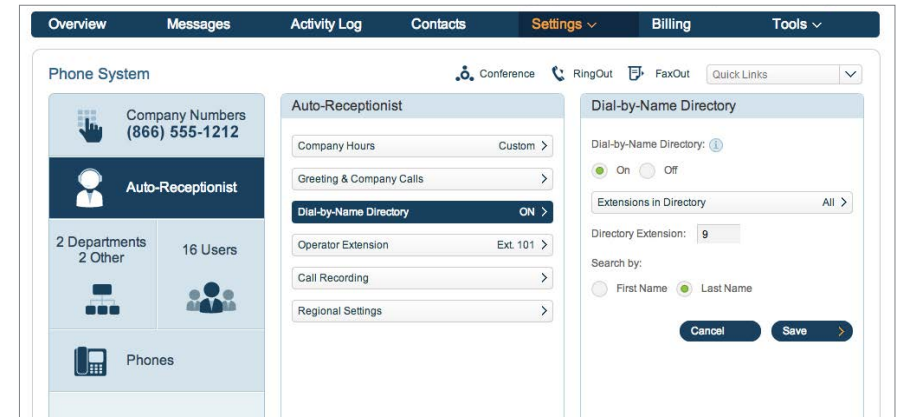
Setting the Operator Extension

Choose an extension to receive calls intended for the operator (extension 0). When callers press 0 or don't enter an extension number, the system will connect the call to the designated employee.

1. From the Phone System screen, click **Auto-Receptionist.**

2. Click **Operator Extension**.

3. Check off the name of the user who will receive operator calls.
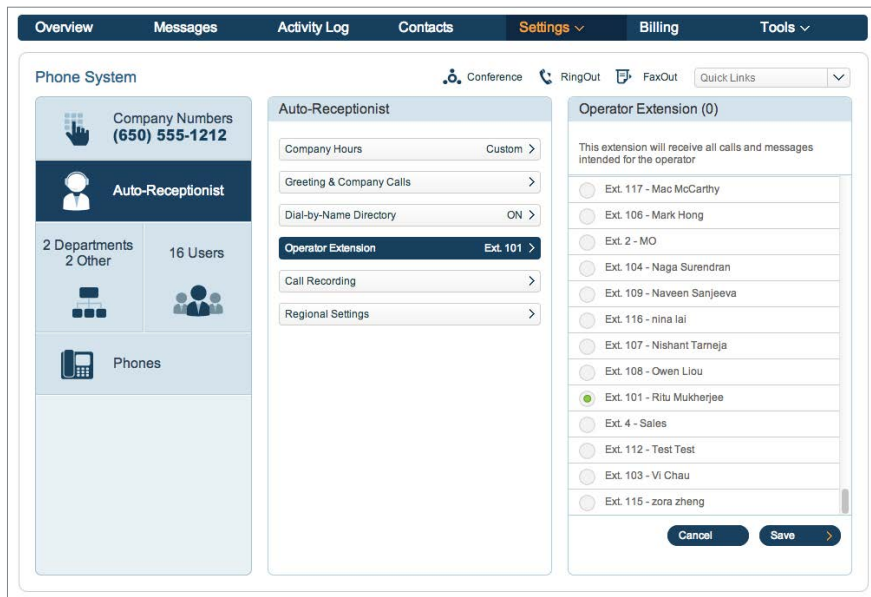
Department Settings

Give your business phone system the flexibility of a much larger organization by creating departments such as sales, support and billing. You can give each department an extension or direct (local or toll-free) number of its own. You may also want to define specific business hours for each department and set up email or text message notifications of any missed calls or voicemails.

Adding a Department

1. From the Phone System screen, click **Department(s)**
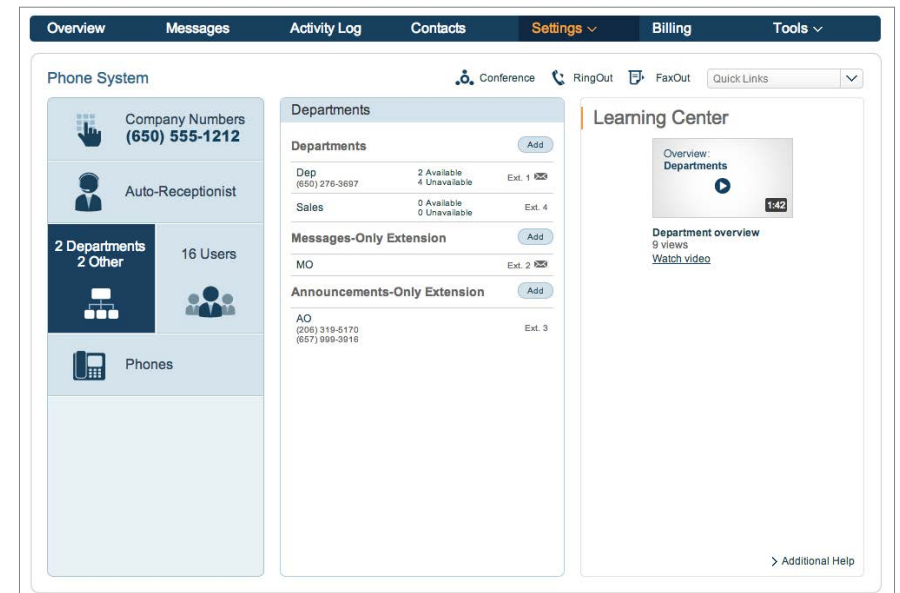
2. Click the **Add** button in the Extensions panel.

3. Give the new department an extension number, enter the name of the department in Extension Name, and add the email of the designated manager of that department, then click **Save**.

4. Select Department Members.

5. Click Save.

6. Back at the Phone Systems--Extensions window, click the new **Department** name.

7. In the window that appears, click **Department Info**.

8. Here you can add the Company Name, if different, a Contact Phone, set Business Hours for this department, and add more Department Members. The person whose email is entered in Manager Email will receive inbound Department faxes and notifications, and can make changes to the Department Info screen.

9. To add a dedicated local or toll-free number for the department, click the tab **Direct Numbers**, then click **Add Direct Number**.

10. Click **Save**.
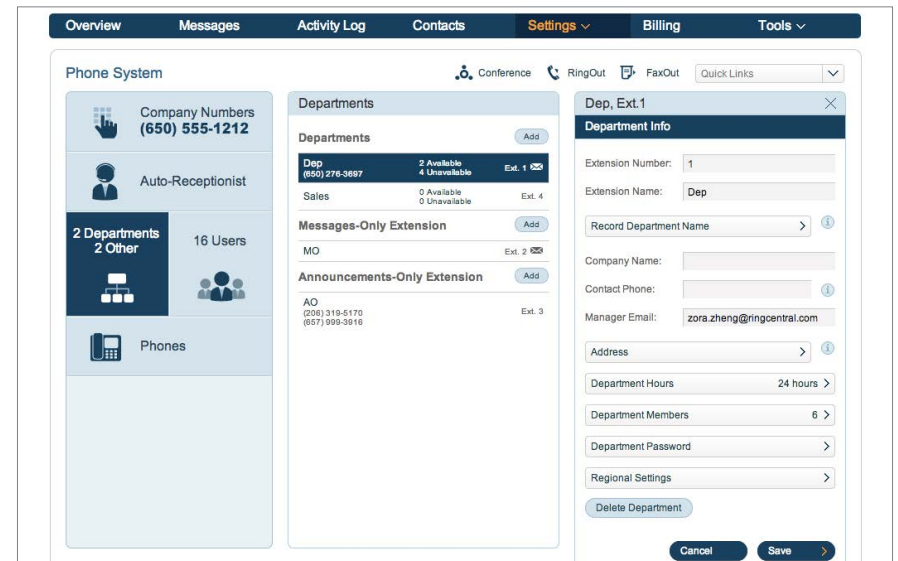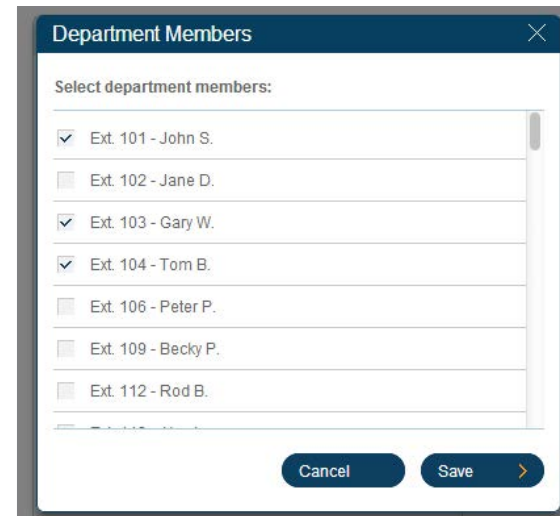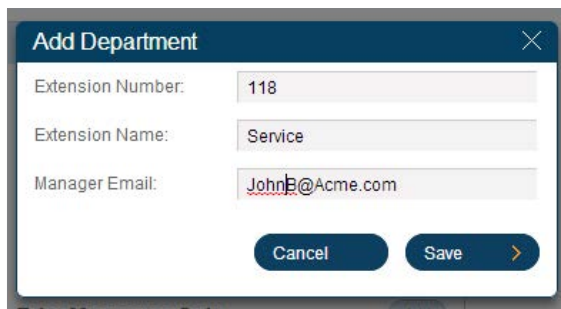
Take-Messages-Only Extension

You may want to designate specific Department extensions for receiving voicemail messages only. When callers dial these extensions, their calls will not be answered or forwarded, but sent directly to voicemail.

1. From **Settings > Company > Phone System**, click **Departments**. Next to **Take Messages Only**, Select **Add**.

2. In the **Extension Info** form that appears, fill in an extension number (one not already being used), give the extension a name (such as Sales Mailbox), and an email address that will get the notification when a message is left. A message will be sent to this email address notifying the owner of this email address that they are now the "owner" of this messages-only extension, and explaining how they can log in to this extension to review such messages.

3. Click **Save**.

Now you must set up a greeting that tells callers to leave a message.

1. You should still be on the **Phone System** screen. Click **Departments**.

2. In the **Extensions** area in the middle column you should see the name and number of the extension you just created under **Take Messages Only** – for example, **sales**. Click that **extension name**.

3. Click **Messages and Notifications**.

4. Click Accept the Default greeting, or create your own custom greeting through your computer, by phone, or by uploading the custom message from an audio file.

5. Click **Save**.

6. Click **Message Recipient**.

7. Here you can select who will receive messages left by callers to this extension. Messages will go into the voice mailbox for the extension you select, and messages can be retrieved from the email box of the owner of that extension.

8. Click **Done**.

9. Now click **Notifications** (in Messages and Notifications on the right). Here you can notify someone, by email or by text message, of a voicemail having been received. If you choose to have them notified by email, then the voicemail message itself will be sent in MP3 format to this email address. Under Text Message, you can add a phone number to receive the text messages.

Announcements-Only Extension

You can set up extensions so that callers hear a specific company or department announcement. For example, you may want to use the extension to give directions to your office or announce a promotion. Callers will not be redirected to another extension or be able to leave a message.

NOTE: Only administrators, or users assigned to the specific extension, can set the announcement.

1. From **Settings > Company/Phone System**, click **Departments**.

2. Next to **Announcements Only**, Select **Add**.

3. Fill in an available extension number, give this announcements-only extension a name for ease of reference, and add an email address for the user who will "own" this extension. That user will receive email instructions for logging in to this extension should wish to re-record the announcement, change the password, etc. The process for recording the announcement is similar to the process for setting up the greeting described in the **Take Messages Only Extension** section.

4. Click **Save.**

Department Member Availability

In the **Department Extensions** middle panel (**Settings > Phone System > Departments/Others**), click the **Dept/Other** tab. Note that for each department there is a count of **Available** and of **Unavailable** members/extensions.

For example, **Billing** shows **0 Available/1 Unavailable** and **Sales** shows **4 Available/0 Unavailable**.

"Available" members can take phone calls. "Unavailable" members are on the phone, or are outside their set business hours.

To see a pop-up window showing the names of department members and their individual availability, click on **Available/Unavailable** for that particular department.

(See also **Member Availability and Hold Times** for settings for this feature.)
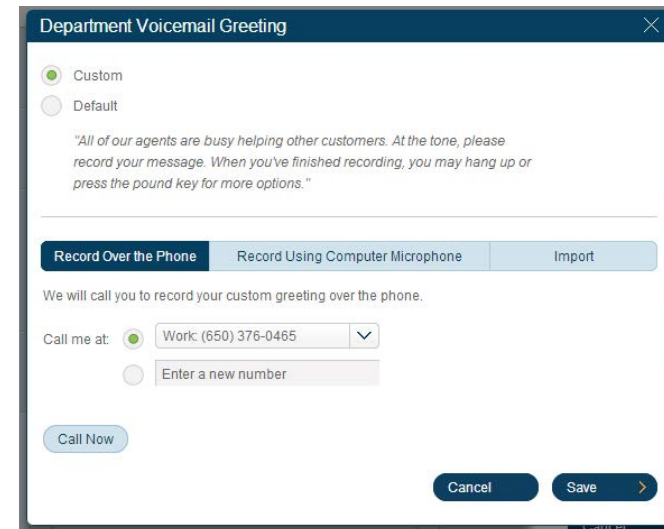
Department Greeting

The Auto-Receptionist greets callers with a personal introductory message when they call a department within your company. Your phone system is initially set to play a default greeting in which the Auto-Receptionist automatically reads the name of the department using text-to-speech technology. Follow the instructions on this page to create a custom department greeting that you either record from your phone or upload from your computer.

Review your Default Department Greeting and Recording a Custom Department Greeting

1. From the **Phone System** screen, select Department(s).

2. Select a department name from the list.

3. Select **Greeting**.

4. Select the **Business Hours** tab (if displayed).

5. Set the **Department greeting** button to **On**.

6. Click the **Set Greeting** bar.

7. Play and, if you wish, **Save** the **Default greeting**.

RingCentral®
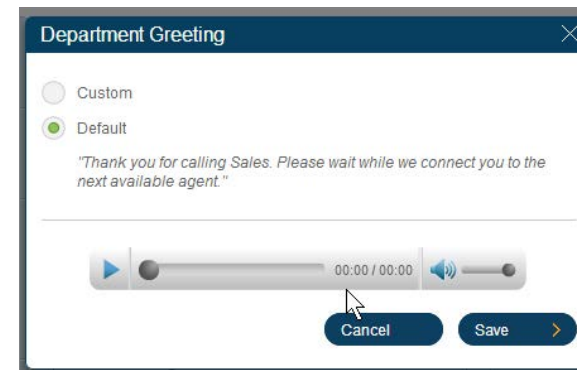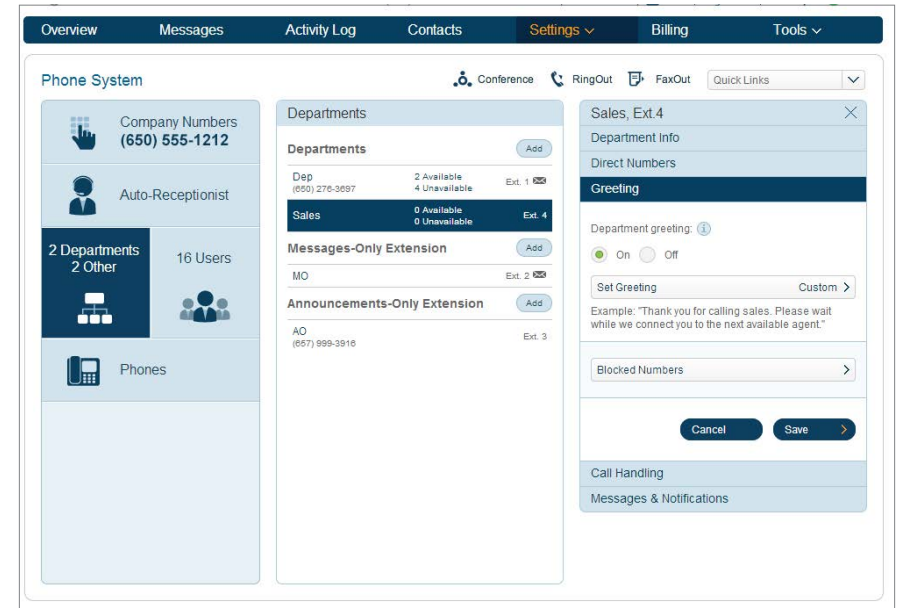
8. Or select Custom, then Record to see recording options:

   a. Click **Record Over the Phone**, select or enter your phone number in **Call me at** and press **Call Now**.

      i. Office@Hand will call you and prompt you to record your greeting.

      ii. Click **Save**. You will have the opportunity to listen to the greeting and accept it, or to re-record it by clicking the red button.

      iii. Repeat this process, selecting the After Hours tab (if displayed), to set up a department greeting for after business hours. Click Save.

   b. Or click **Record Using Computer Microphone**.

      i. Click **Allow** when prompted.

      ii. Click **Record** to start recording through your computer's microphone.

      iii. Click **Stop** and the recording will be uploaded and applied.

   c. Or click **Import** to upload a prerecorded department greeting from a file on your computer.

      i. Click **Browse**, select a .WAV or .MP3 file from your computer.

      ii. Click **Open**, then **Attach**. (An error message will alert you if you select a a non-.WAV/non-.MP3 file.)

      iii. Click **Save** when done.

      iv. Repeat this process, selecting the **After Hours** tab (if displayed), to upload a department greeting from your computer for after business hours.

Download a Custom Department Greeting

To download an existing Custom Department Greeting, click on the green **Download** button that is displayed on the **Set Greeting** screen when you have a Custom greeting. The greeting will be saved to the local drive of your computer, as a .WAV file.

Department Voicemail Greeting

When a caller is sent to voicemail, the Auto-Receptionist plays a default greeting with instructions to the caller. Follow these instructions to customize this message, and to select a department member to receive the voicemails.

1. From the **Phone System** screen, click **Department(s)**.

2. Select a department from the list.

3. Click **Messages and Notifications**.

4. Click the **Business Hours** tab (if displayed).

5. Click **Voicemail Greeting**.

6. Click **Default** to play an automatic voicemail greeting. You can review the script of this default greeting by selecting **Play**.

7. To record a new voicemail greeting over the phone, select **Custom** then **Record** over the phone. Select a phone number, then **Call Now**. Office@Hand will call and prompt you to record your message.

8. To upload a prerecorded voicemail greeting from your computer, select **Import**, then upload a .WAV or .MP3 file.

9. To record a message using your computer's microphone, click **Record Using Computer Microphone**. Click **Allow** when prompted. Click **Record** to start recording through your computer's microphone. Click **Stop** and the recording will be uploaded and applied.

10. Now click the **Message Recipient** bar to specify a particular department member to receive messages left for this department.

11. Click the **Notifications** bar to have the system send an email or text-message notification to a recipient of your choice when voicemail messages or faxes are received, or calls missed.

12. Repeat with the **After Hours** tab (if displayed), using one of the three methods above to create a department voicemail message to be played to those who call after business hours.
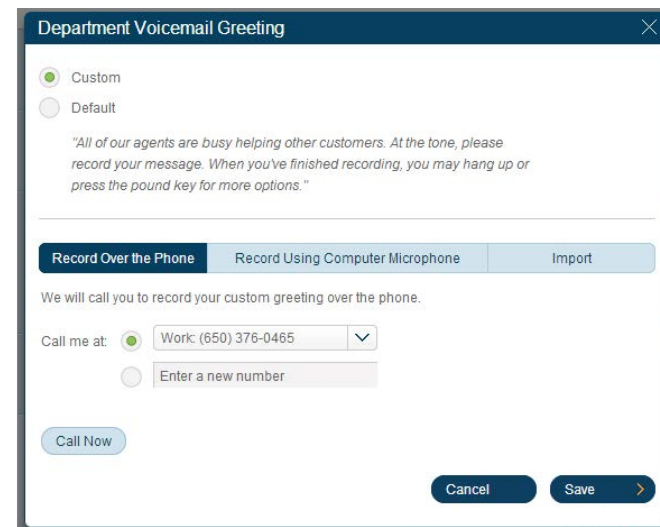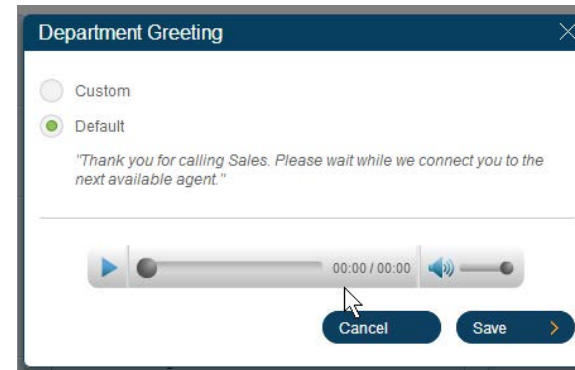
Department Call Handling

Use these settings to select call handling, on-hold music, and more.

1. From the **Settings > Phone System** screen, click Department(s).

2. Select a **department** from the list.

3. Click **Call Handling**.

4. Select the **Business Hours** tab, if displayed.

5. Select the order in which calls will be transferred to department members: **Rotating** (in order by extension number); **Simultaneous** on all department extensions; or **Sequentially in fixed order** to choose another order (click the bar **Specify fixed order** to choose).

6. Select the **on-hold music** callers will hear during business hours.

7. Choose how often the **on-hold music** 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.

8. You can also choose various handlings of callers who are waiting on hold in the **Member Availability** menu.

9. Select the **After Hours** tab, if present, and repeat this process to set how department calls will be handled after working hours.
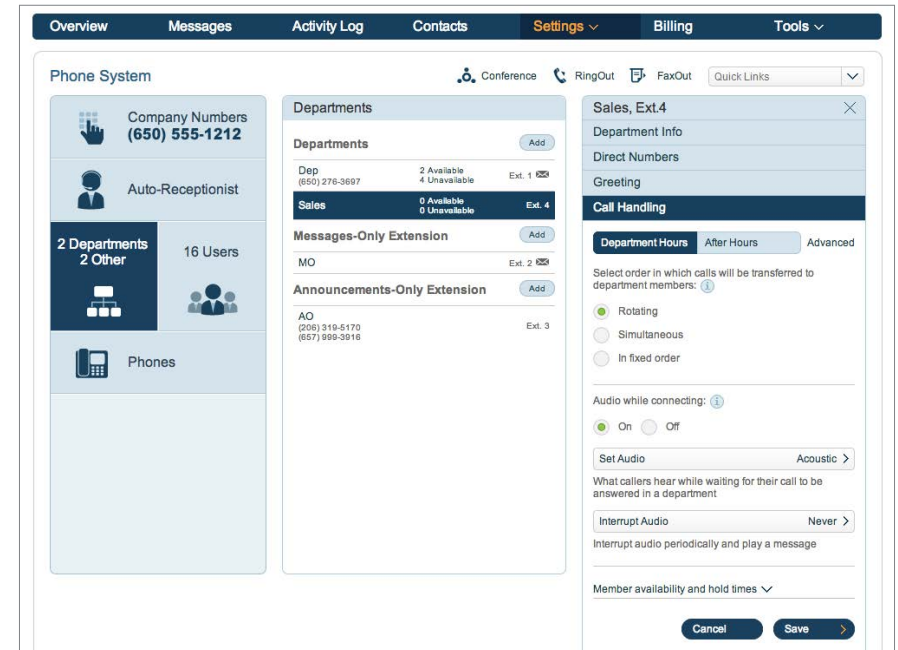
Department Member Availability and Hold Times

At the bottom of the Call Handling panel on the right, click **Member availability and hold times** to manage these settings.

Options on this menu determine how inbound calls to the department are handled, depending on the availability of the department members, and how long it takes to connect to a given member.

Options are:

• **Maximum time to wait for a department member to answer a call before trying the next member** in the department rotation order, in minutes.

• **Minimum post-call wrap-up time before agent's status is automatically set to available**, in seconds. You can give the department member some time to handle the results of the call, such as making notes.

• **Maximum hold time to wait for an available department member**, in minutes, before transferring the on-hold call to the next member.

• **If the number of callers waiting exceeds (number)**, you can either send the next callers directly to voicemail, or disconnect after telling new callers of the heavy call volume.

Advanced Call Handling for Departments

Advanced Call Handling lets you create specific additional rules for that a department extension based on date and/or time of call, or Caller ID, or the number called. These rules override your regular call-handling rules for that extension.

1. To create a Rule for a specific Department, go to the **Settings > Phone System** screen, click **Department**, then click a specific department for the rule.

2. Click **Call Handling**, then click **Advanced**.

3. Click **Learn more** about advanced call handling, if desired.

4. Click **Add Rule**.

5. Give your rule a Name, then select the conditions: Date and/or Time the call comes in; the Caller ID of the caller; and/or the Called Number. You can combine these selections.

6. Click **Next**.

7. If you selected **Date and/or Time** as your rule condition, now select a **Weekly Schedule**, with specific times for each day if you wish. Or select a **Specific Date Range**.

8. If you selected **Caller ID** for this rule, you can enter one or more phone numbers, or choose names from your Contact List, or enter area codes or other partial numbers.

9. If you selected **Called Number**, choose the number(s) to which the rule will be applied. The choices will be the Main Number, or the Auto-Receptionist for the department.

10. Click **Next** and choose when to apply the rule: during Business hours, After Hours, or Always.

11. Click **Next**.

12. Select the action to take when incoming calls match this rule.

    a. Forward Calls: Then set custom Call Screening, Call Forwarding, or Messages handling for these calls.

    b. Take Messages Only to send callers to voicemail. You can choose to take messages or not, and can customize the voicemail greeting.

    c. Play Announcement Only and then end the call.

    d. Unconditional Forwarding, which immediately forwards the call to a number you then select, bypassing any other call handling, including greetings, call screening, voicemail, and Softphone.

    e. You can also set Department Greetings and Call Handling for this rule, and under Messages choose a voicemail greeting and select the extension that will receive messages generated by use of this rule.

    f. Click **Done**.

You can edit, changing details and conditions, turn the rule on and off, or delete any of these Rules by clicking **Advanced** from Call Handling, then clicking on the Rule, and making desired changes on the screens that follow.
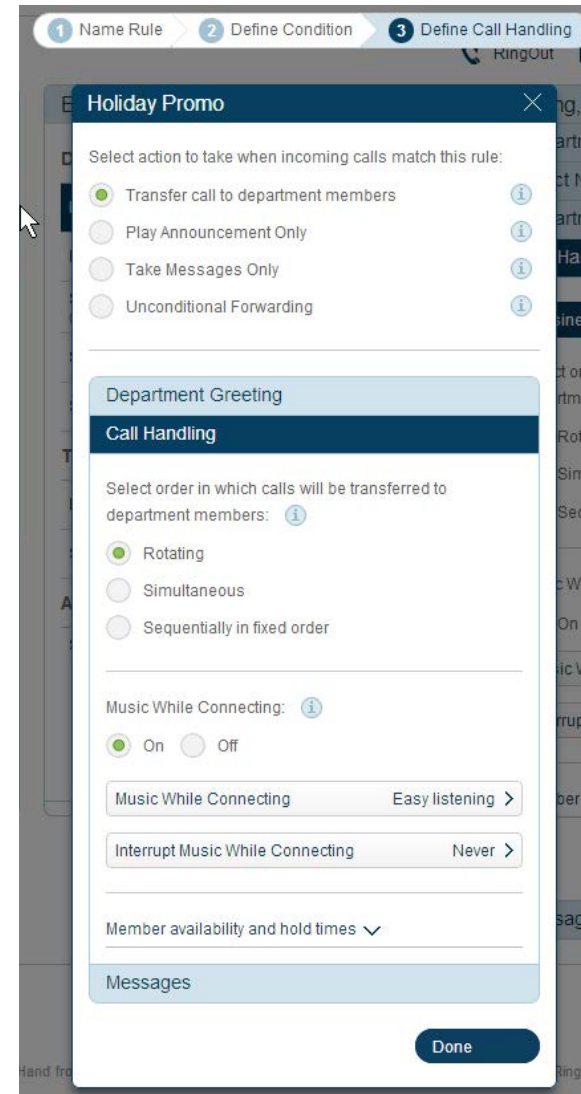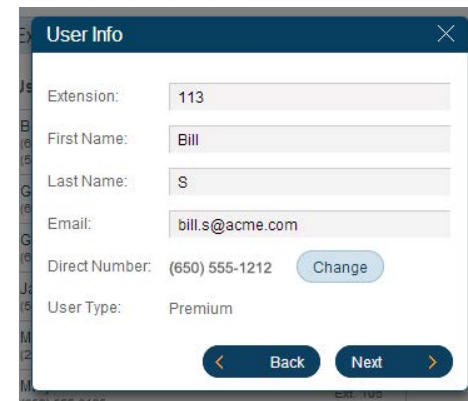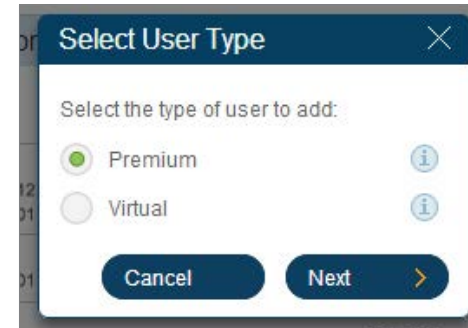
User Settings

Adding Users

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

NOTE: Extensions 0 and 9 are reserved for the operator and company directory, respectively. The number of user extensions you can create depends on your plan.

Adding a User/Extension

1. From the **Phone System** screen, click Users.

2. Click the **Add** button.

3. You may be asked to select the **type of user** to add: Premium or Virtual. Pick one* and click **Next**.

4. Fill out information for the new user.

5. Click **Save** when done.

*NOTE: A Premium user has access to all the capabilities of your phone system, including making both inbound and outbound VoIP calls from desk phones and from the Softphone. A **Virtual user** can receive incoming calls on existing phones, and place and receive VoIP calls from their smartphone. Virtual users cannot use desk phones, or use VoIP to make calls from the Softphone.

User Permissions: Assigning Administrators; and Granting International Calling Privileges

You can designate additional users as Administrators, with the same privileges to change or edit your company's Office@Hand phone system settings. You'll want to decide which if users in your company should have access to these permissions.

NOTE: Users designated as Administrators have full Admin rights, except that they cannot delete the account owner, nor change the billing address and billing info settings.

1. From **Settings > Company > Phone System**, click **Users**.

2. Click **Edit Permissions**, which is the bar at the bottom of the middle column.

3. Review the list of user(s) and check those you want to have administrator privileges.

4. You cannot remove Administrator privileges from the Account owner, nor from your own account.

   a. In the same Permissions screen, you can select specific users to allow to make international calls. (See **International Calling** for more information.)

5. Click **Save**.
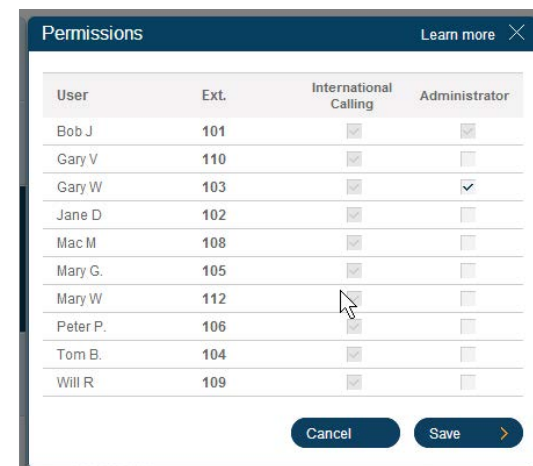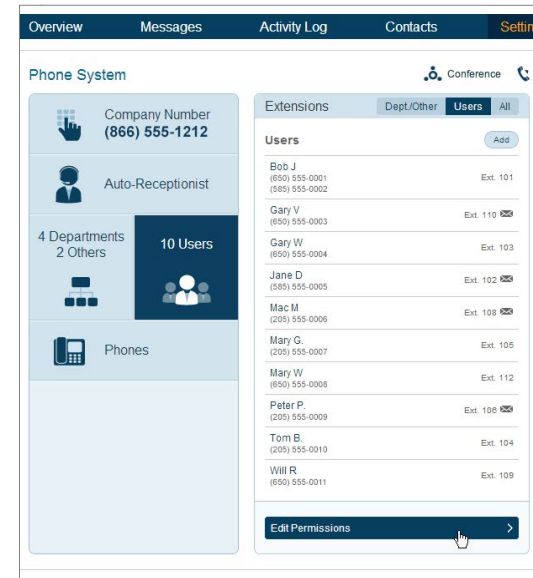
User Information: Name and Contact Info, Forwarding Rules, Direct Number

As Admin, you can edit a user's name and contact information. You may set up separate Business Hours and After Hours forwarding rules for each extension, plus add or change the Direct Number for the extension/user.

1. From the **Settings > Company > Phone System** screen, click **Users**.

2. Click the user you want to edit. Click **User** Info.

3. You can make changes to the following information:

   a. **Extension number**

   b. **First Name**

   c. **Last Name**

   d. **Pronounced Name:** Create a phonetic spelling of the user/extension name so the system can pronounce it correctly—the Office@Hand text-to-speech utility will use this, and you can refine the phonetic spelling until you are satisfied with the translation. Or you can record the correct pronunciation by clicking **Record my name** — you can then have the system call you on your phone so you can speak the correct pronunciation, or you can upload an MP3 file with the correct pronunciation.

   e. **Company Name**, if the user works for a subsidiary or a remote office, for example.

   f. **Email**, the address to be used for RingCentral communications and notifications.

   g. **Contact Phone**, the phone number put on the cover page of faxes this User sends.

h. **User Type**, shows whether the user is a Premium or a Virtual user. You can upgrade a Virtual user to a Premium user by clicking the Change button.

i. **Address**, allows you to specify a mailing address for that user's fax cover pages.

j. **Business hours** can be set for each user/extension.

k. **Change Security Settings** to change the user/extension password and security question. To make changes for a user, you must have the user's current password.

l. **Resend Welcome Email** appears for users who have not yet activated their accounts. Click to resend the Welcome Email to remind them to activate.

m. **Delete an Extension**. Deleting an extension deletes all user data for the extension. If there is a direct dial number associated with the extension, you may choose to assign it to another user or add it as an additional company number.

Personal Greetings

Your RingCentral system comes with a default personal (introductory) greeting for each user/extension, such as, "Thank you for calling (user name)." You can easily change the greeting for each user/extension in your company. Follow these steps to record a custom greeting over the phone or through your computer microphone, or import a prerecorded greeting from your computer.

1. From the **Company Phone System** screen, click Users.

2. Select a **User** from the list.

3. Click **Call Screening, Greeting & Hold Music**.

4. To set up a personal greeting for this extension, check **On** next to **User Greeting**.

5. Click on the **Set Greeting** bar.

6. To hear the automated (default) introductory greeting, click **Default** then play to review. **Cancel** to retain this greeting.

7. To record a new introductory greeting through your computer, select **Custom**, then **Record Using Computer Microphone**.

8. Tap **Allow** when prompted.

9. Tap **Record** to start recording.

10. Stop Recording and the greeting will be uploaded and applied.

11. To record a new introductory greeting over the phone, select **Custom**, then **Record Over the Phone**.

12. Select a phone number at which RingCentral can call you.

13. Click **Call Now**.

14. Record your greeting as prompted, then click **Save**. To upload a prerecorded voicemail greeting from your computer, select **Import** then upload .WAV or .MP3 file.

15. To download your existing Custom Personal Greeting, click on the green download button that appears when you have a custom greeting recorded. The greeting will be saved to the local drive of your computer, as a .WAV file.

NOTE: If you have set business hours for this user extension, you can select the After Hours tab and repeat these steps to set a personal greeting during after hours.
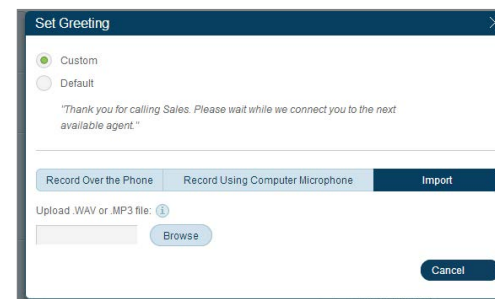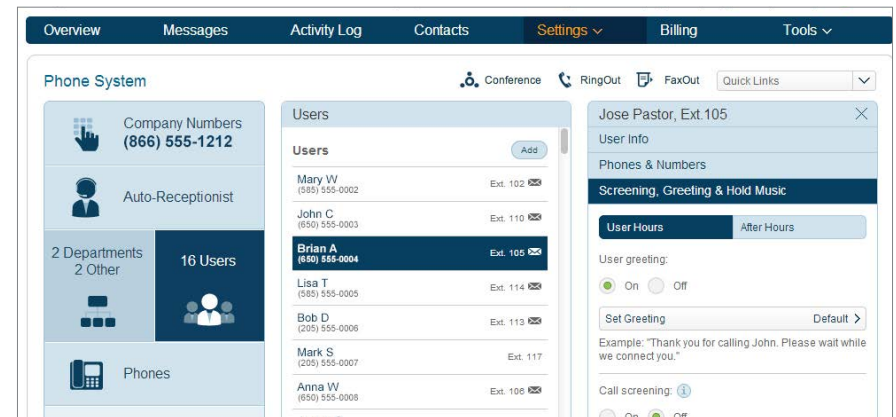
Screening Calls

RingCentral makes it easy to screen calls for each of your users by prompting callers to announce their name. You can screen out callers who are not on a user's list of contacts and/or those calls that come in without caller ID.

Preparing for Call Screening

To activate Call Screening, first check the following setting in Call Handling.

1. Select the **User** (**Settings > Company > Phone System > Users >** select a particular user)

2. Click **Call Handling**.

3. Choose the **Business Hours** tab (if present).

4. Scroll down and click the **Call Information** bar.

5. For Call Screening to work, as described below, first set **Play announcement before connecting** to **Always**.

6. **Save**.

From this **Call Information** screen, you can also set **Incoming number displayed to me** to determine what is displayed on the user's phone when receiving a forwarded call. If the user's phone is also used for personal calls, knowing the Caller ID or the number originally called allows the user to answer forwarded calls appropriately.

In addition, the options under **Play announcement before connecting** cause forwarded calls to announce the extension or department name that is forwarding the call, helping the user to answer the call appropriately--especially useful if the call is forwarded to a personal phone or another business phone. You can choose to have such announcements made for all forwarded calls, or only for calls forwarded to non-RingCentral Office@Hand from AT&T phones (such as the user's home phone or cell phone).

Setting the option **Require my password to answer** requires you to enter your department or extension password before accepting the call. This will prevent others from answering your calls, as for example when you don't want your children answering business calls you receive at home. The password is the same one you use to log into your extension or department online.

You can repeat this process for **After Hours** (if you have business hours set). **Note** that when you select the **After Hours** tab, this message may display: *Call screening is OFF since the extension is set to play announcements when called after hours. To enable call screening options go to Call Forwarding and change the answering mode.* To enable call screening for this user for after hours, click **Call Handling**, then the **After Hours** tab. Under **After hours Call Handling** select **Forward Calls**. You will then have the opportunity to enter the phone numbers to which calls received after hours will be forwarded. Such calls will be screened according to the rules you set below.

(If you select **Send callers to voicemail** or **Play announcement and disconnect** or **Unconditional Forwarding**, after-hours calls won't be screened but will go directly to voicemail, or be disconnected, or be forwarded immediately, without greetings or screening, to the selected number.)

Now you are ready to set up **Call Screening** for this user.

Setting Up Call Screening

1. From the **Phone System** screen, click **Users**.

2. Choose the **user** you want to edit.

3. Click **Call Screening**.

4. Select the tab **Business Hours** or the tab **After Hours** if they are present.

5. Turn on P**ersonal Greetings** if you wish, then accept the default greeting ("Thank you for calling John Smith") or record or import a custom message by following the prompts.

6. Set **Call Screening** to **On** or **Off.** Call screening prompts callers for their names before connectng the call. You can choose to prompt the caller to say their name before connecting if the call has no Caller ID; or if the caller is not on the user's contact list; or Always.

7. Choose a **Connect Prompt**, if you wish, that plays when your caller is being connected. You can accept the default message ("Please hold while I try to connect you"), or record or upload a custom message.

8. Now set **Music while connecting** if you wish callers to hear music while the call is being connected. Choose prerecorded music, or click **Custom** to upload a .WAV or .MP3 music file from your computer.

9. Click **Save**.

Call Blocking

Follow the instructions below to block calls with no caller ID, or to create a list of numbers you'd like to block. When a caller with a blocked number tries to call, the caller will hear a message that their call cannot be accepted.

1. From the **Phone System** screen, click **Users**.

2. Choose the user you want to edit.

3. Click **Call Screening**. Scroll down and click the Blocked Numbers bar.

4. To block only numbers with no caller ID, click **Calls with no caller ID**.

   a. Click **On**.

   b. Select the message or signal that callers from blocked numbers will hear.

   c. Click **Save**.

5. To compose a list of specific phone numbers to be blocked, click Block Specific Numbers.

   a. Enter a number you wish to block and, optionally a caller name.

   b. Click **Block**.

   c. Enter any additional numbers you wish to block, and click **Block**.

   d. Then select the message or signal callers from blocked numbers will hear.

   e. Click **Save**.

6. Click **Done**.
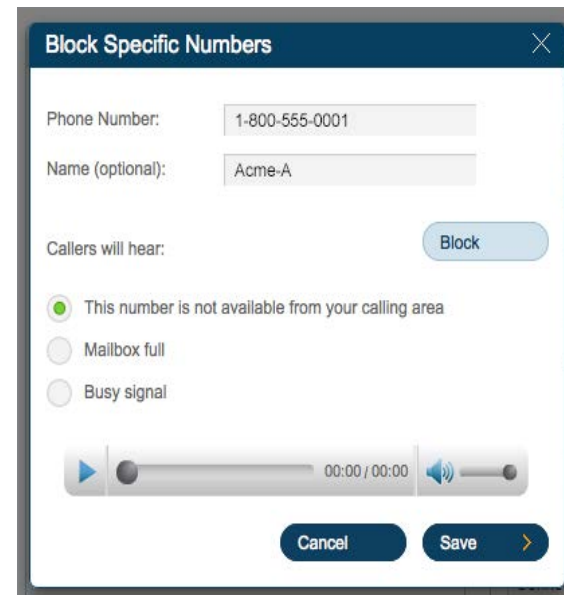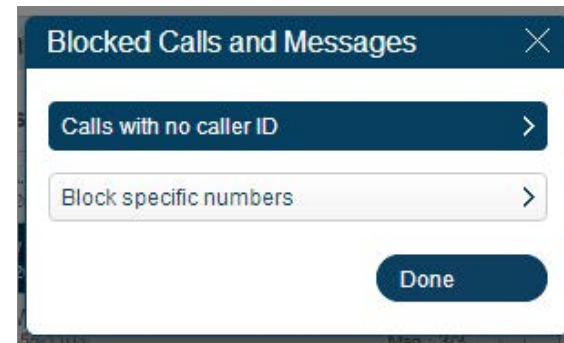
Call Information

You can choose settings in Call Information so that when you receive a call, either at your office or forwarded to another of your phones, you will hear a recorded prompt that announces the name of the extension the caller dialed. For example, it may say, "*John, you have a call*." Or "*Sales, you have a call*." This feature helps users who are members of more than one department, or who use phones that are both business and personal, answer the call appropriately.

1. From the **Phone System** screen, click **Users**.

2. Choose the user you want to edit.

3. From the **User Info** screen, click **Call Handling**.

4. Click **Call Information**, towards the bottom of the screen.

5. To set how your incoming call is displayed to you, choose **Caller ID** or **Called Number** (the number that the caller used to reach you). Called Number will display the phone number the person dialed. If you use your phone for personal use as well, it allows you to identify business calls and answer them appropriately. The Caller ID option displays the phone number of the person calling.

6. **Play announcement before connecting** causes the system to announce the extension or department name that is forwarding the call to your phone. This is helpful for identifying how you should answer the call, especially if you use the phone for multiple businesses or personal use. Choose one of the following options:

   a. **Always:** All calls will be announced when forwarded to any of your phones.

   b. **For non-RingCentral Office@Hand from AT&T Calls only:** Plays the announcement when forwarding a call to your home or mobile phone, but not when forwarding to an Office@Hand desk or other phone.

   c. **Never:** All calls will be connected without an announcement (unless they are from blocked numbers). When announcements are played, you are asked to press **1** to accept the call.

7. Click **Yes** under **Require my Password** to answer if you want your user password be entered before connecting you to your incoming call. This is a helpful security feature if you don't want others to answer your calls, such as when you are at home or at another location.
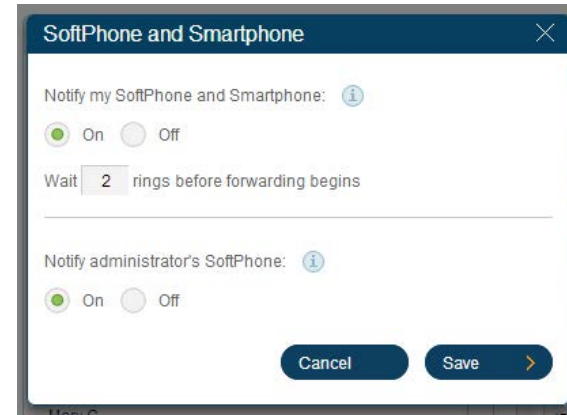
8. Click **Save**.

Call Forwarding

With RingCentral you can set up different call forwarding rules for each user/extension. You may add up to four forwarding numbers for each extension, and set calls to ring at these numbers and, if not answered, ring the next number, or ring all numbers simultaneously.

1. From the **Phone System** screen, click **Users**.

2. Choose the user you want to edit.

3. From the **User Info** screen, click **Call Handling.**

4. Click **Ring my existing phone numbers** and add up to four numbers. For each number, select Active to use that phone number (numbers can be turned on and off as needed), and select how many rings for that number.

5. You can enter numbers with extensions by putting an asterisk between: **[number] * [extension]**. The system will dial the number, pause, then dial the extension.

6. You can refine these selections by choosing to have numbers ring **Sequentially** (one after another—when the first number is not answered after the designated number of rings, the call forwards to the next number on your list), or ring Simultaneously.

7. You can also **Group** several numbers so they will ring at the same time when Sequentially is selected before moving on to the next number or group of numbers.

8. You can set call handling for **Business Hours** and separately for **After Hours**.

9. Click **Sequentially** or **Simultaneously** to set how RingCentral forwards calls to the forwarding numbers. If you set the phones to ring Sequentially, then after you Save you can return to this screen to change the order in which they ring by clicking the up and down arrows that appear in the Move column.

10. You can click **Forward to other user's phones** to select others in your RingCentral phone system to receive forwarded calls. These are then added to your call list, where they can also be reordered and turned on or off.

11. When a call comes in to phones set to forward calls, you can have the system display the call on your computer **Office@Hand Softphone** before it forwards the call. The Softphone has several call controller functions that might be useful. *(Download your Softphone from **Tools > Softphone > Download**)*

   a. Turn your **Notify my Softphone and Smartphone** setting **On**. (**NOTE:** Smartphone notification is not available for all smartphones. Check your specific smartphone for availability. Set the number of Softphone rings. (There are 5-6 seconds between rings; setting this to four or five rings will give you time to take advantage of Softphone call-answering features such as reply with a message, screen voicemail, or forward call to a number of your choice, if you wish, before it forward the call.)

   b. Set the number of Softphone rings. (There are 5-6 seconds between rings; setting this to four or five rings will give you time to take advantage of Softphone call-answering features such as reply with a message, screen voicemail, or forward call to a number of your choice, if you wish, before it forward the call.)

   c. Set **Notify administrator's Softphone** to **On** to have the system display the call on the Softphone of your system Administrator as well or instead.
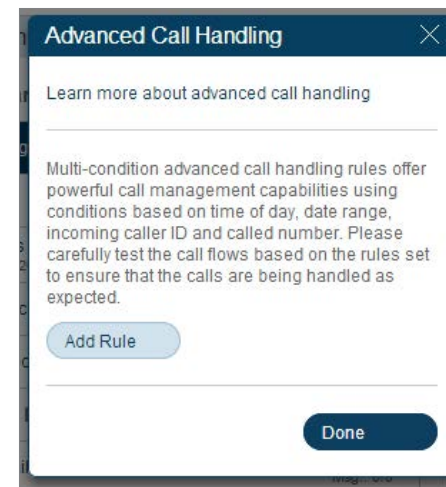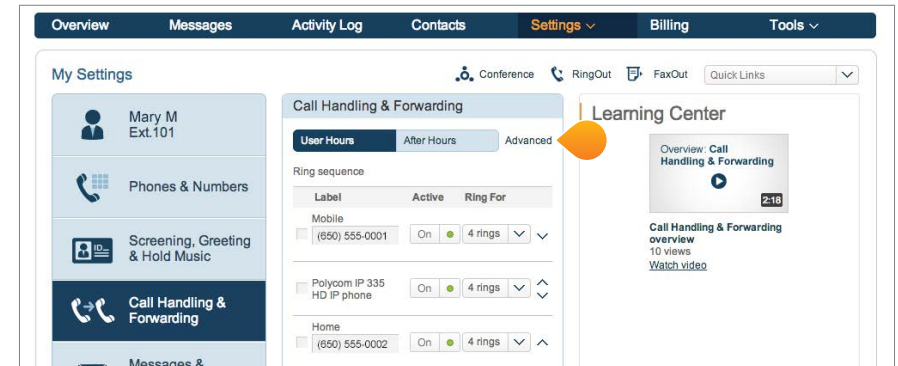
   d. Click **Save**.

12. Click **Save** again when done.

NOTE: If you have selected **Unconditional call forwarding**, all calls will be forwarded to the number provided in the Advanced settings in Call Forwarding; this setting will override all other settings, such as voicemail and greetings and Softphone.
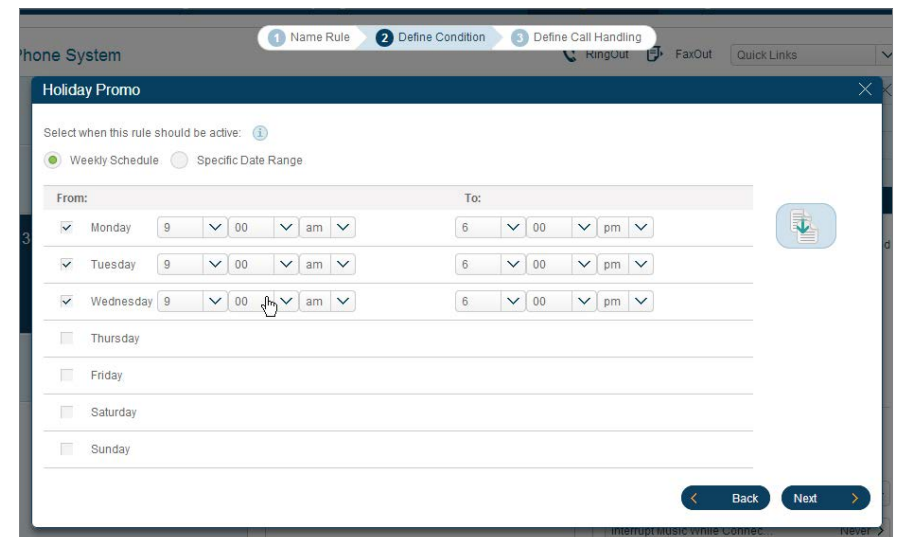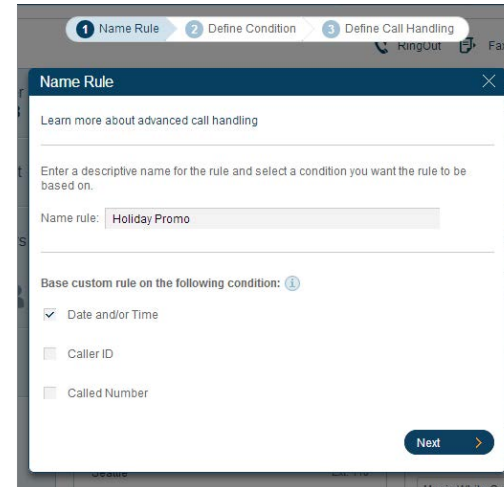
Advanced Call Handling for Users

Advanced Call Handling lets you create specific additional rules for a user extension based on date and/or time of call, or Caller ID, or the number called. These rules override your regular call-handling rules for that extension.

(Advanced Call Handling for Users functions much the same as Advanced Call Handling for Departments.)

1. To create a Rule for a specific User, go to the **Settings > Phone System** screen, click **Users**, then click a specific User for the rule.

2. Click **Call Handling**, then click **Advanced**, which is to the right of Business Hours/After Hours. (If you have not set business hours for this user, or set them at 24 Hours, **Advanced** will be on this line by itself.)

3. Click **Learn** more about advanced call handling, if desired.

4. Click **Add Rule**.

5. Give your rule a **Name**, then select the conditions: **Date and/or Time** the call comes in; the **Caller ID** of the caller; and/or the **Called Number**. You can combine these selections.

6. Click **Next**.

7. If you selected **Date and/or Time** as your rule condition, now select a **Weekly Schedule**, with specific times for each day if you wish. Or select a **Specific Date Range**.

8. If you selected **Caller ID** for this rule, you can enter one or more phone numbers, or choose names from your Contact List, or enter area codes or other partial numbers.

9. If you selected **Called Number**, choose the number(s) to which the rule will be applied: The choices will be the Main Number, the Auto-Receptionist for the department, and for users, the user's number.

10. Click **Next** and choose when to apply the rule: during Business hours, After Hours, or Always.

11. Click **Next** again.

12. Select the action to take when incoming calls match this rule.

   a. Forward Calls: Then set custom Call Screening, Call Forwarding, or Messages handling for these calls.

   b. Take Messages Only to send callers to voicemail. You can choose to take messages or not, and can customize the voicemail greeting.

   c. Play Announcement Only and then end the call.

   d. Unconditional Forwarding, which immediately forwards the call to a number you then select, bypassing any other call handling, including greetings, call screening, voicemail, and Softphone.

   e. You can also set Department Greetings and Call Handling for this rule, and under Messages choose a voicemail greeting and select the extension that will receive messages generated by use of this rule.

13. Click **Done**.

You can edit, changing details and conditions, turn the rule on and off, or delete any of these Rules by clicking **Advanced** from Call Handling, then clicking on the Rule, and making desired changes on the screens that follow.
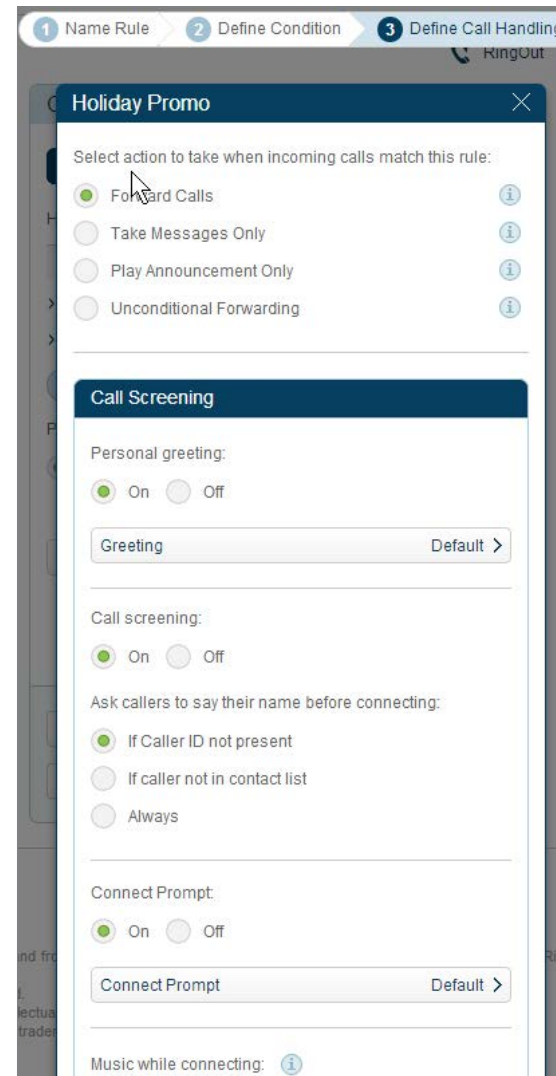
Call Flip

Office@Hand Call Flip lets you transfer live conversations from one device to another quickly and easily. Flip a call you are on to your mobile phone on your way out of the office. Or flip a mobile call to your home phone once you've finished your commute. Simply dial two numbers and Flip.

To manage the Flip numbers of any user, go to the **Phone System** page (**Settings > Company > Phone System**), click on **Users** and then a particular **User**. then click **Call Handling**. Towards the bottom of Call Handling, click the **Call Flip** bar.

You will then see a list of numbers/devices assigned to that user (including desktop IP phones, cell phones, and Softphone), with a Flip number beside each. The arrows let you move a device up or down to change its assigned number.

To manage your own Flip numbers, go to **My Inbound (Settings > Personal > My Inbound**), click **Call Handling**, and the **Call Flip** bar at the bottom. You will see a list of your phone devices with Flip numbers assigned. Again, click the arrows if you want to change the order and the number assigned to each device.

To add numbers to a Call Flip list

Use **Ring my existing phone numbers**, which for your Users you will find at **Settings > Company/Phone System**, click **Users**, then choose a particular **User**, and then **Call Handling**. For yourself you will find the link on your account at **Settings > My Inbound > Call Handling**.

In either case, when you click **Ring my existing phone numbers**, a list of numbers on your or your user's account appears. (Once you click this option, the numbers list remains open and the phrase **Ring my existing phone numbers** no longer appears.)

- Turn On devices you want to use

- Type in additional phone numbers you want to use in spaces provided for Mobile, Home, and Other, and click them **On**.

- Click the **phrase > Forward** to other user's phones and check the numbers of colleagues you wish to add to this list.

- Then check the box next to each device you want to appear on the Call Flip list. Click **Save**.
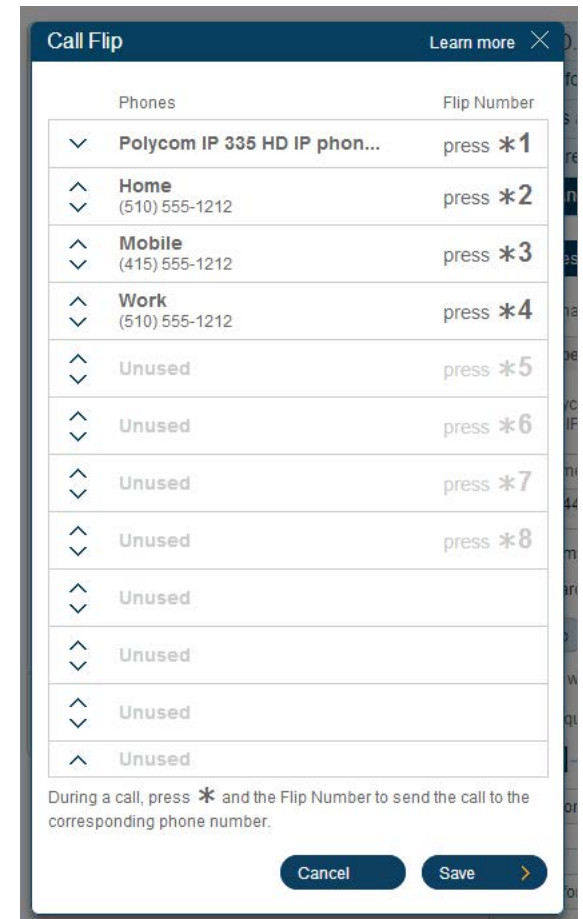
 Now go back to the **Call Handling** panel and click **Call Flip** (at the bottom of the Call Handling panel). You will see the phones you selected added to the Call Flip list; you can change the order (and the assigned Flip numbers) to suit. (If you don't see the numbers you added, go back to the previous step and remember to **Save** before moving on to **Call Flip**.)

To use Call Flip

When you are on a phone call, press the **asterisk key** (*) and a number corresponding to the device to which it is assigned, and the call is transferred immediately to that device. For example, if you have the number 2 assigned to your home phone, clicking *2 while you are on a call will instantly transfer the call to your home phone. Call Flip makes it easy and convenient to flip calls from device to device as you move about.

Changing the Default Area Code

If some of your users are located is in one geographic area code, but make most of their calls to numbers in another area code, you can change their "default area code" so that, as a convenience, when they make calls to that area, they can leave off the **1+Area Code** prefix and just dial the number directly, as if it was local to them.

1. From **Settings > My Inbound**, click the **Phones and Numbers**.

2. Scroll down and select the **Phone** for which you want to change the default area code.

3. In the **Phone Details** screen, enter a new area code in the **Default Area Code** box.

4. Click **Save**.

When they dial without an area code, the system will now use this area code prefix by default.

Outbound calls appear to recipients to be coming from the chosen area code--which can be convenient for a business wishing to establish a local presence.

Call Recording – Important Legal Requirement

Call Recording is a simple but useful feature that makes it easy for RingCentral users to record calls they make or receive.

Certain state and federal call recording laws apply to the use of this call recording feature by you and all users associated with your account. In some states, you and each user associated with your account is required to obtain consent from all parties to record a phone call. By using the RingCentral call recording feature, you and each user associated with your account are required and must agree to maintain compliance with all applicable state and federal laws and regulations.

On behalf of your organization, you agree to notify all users associated with your account of their obligation to comply with all applicable state and federal laws and regulations.

You and each user associated with your account understand and agree that each of you are solely liable for compliance of such laws and regulations, and under no circumstances shall RingCentral or AT&T be responsible or held liable for such compliance.

On-Demand Call Recording

Once set up, your users can activate call recording while taking a call on a RingCentral phone number at the office via an IP phone or anywhere using a cell phone.

Follow these instructions to enable Call Recording.

1. From the **Settings** tab, select **Call Recording**.

2. Select **Enabled**.

3. Click **Announcement on Start of the recording** and record an announcement that the caller will hear when recording starts, and then click **Announcement on Stop** to record an announcement the caller will hear when recording ends. In each case, select a **Default** or create a **Custom** announcement for each.

4. If you choose Custom, you may **Record Over the Phone** or **Import** a pre-recorded greeting (maximum duration 5 minutes) from your computer. When finished, click **Save**.

5. Back at the Call Recording screen, click **Save**.

Now users can **start and end call recording from any RingCentral phone by pressing the *9** (star key and nine). The Start announcement will play when recording begins, and the Stop announcement when *9 is pressed again to stop the recording.

Users can find the call recordings by clicking **Messages** in the menu bar, then **Recordings**.

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Automatic Call Recording

In addition to on-demand Call Recording, Automatic Call Recording enables Administrators to record and review all calls to and from selected extensions.

Automatic Call Recording is available to Administrators of the Office@Hand Premium User Plan.

To enable Automatic Call Recording, go to **Settings > Phone System** and click the large **Set Company Call Recording** button on the right side of the screen.

Locate and click the **Automatic Call Recording** bar on the right side.

Click the **Enabled** button.

Review the **call-recording waiver pop-up** that warns of U.S. federal and state laws requiring consent to record calls.

Check the **Call Recording Announcement** that automatically plays to incoming callers letting them know the call is being recorded, before connecting them. This message can be customized. Note that the warning message does not play for outgoing calls; the user making the outgoing call must announce when the call is answered that it is being recorded.
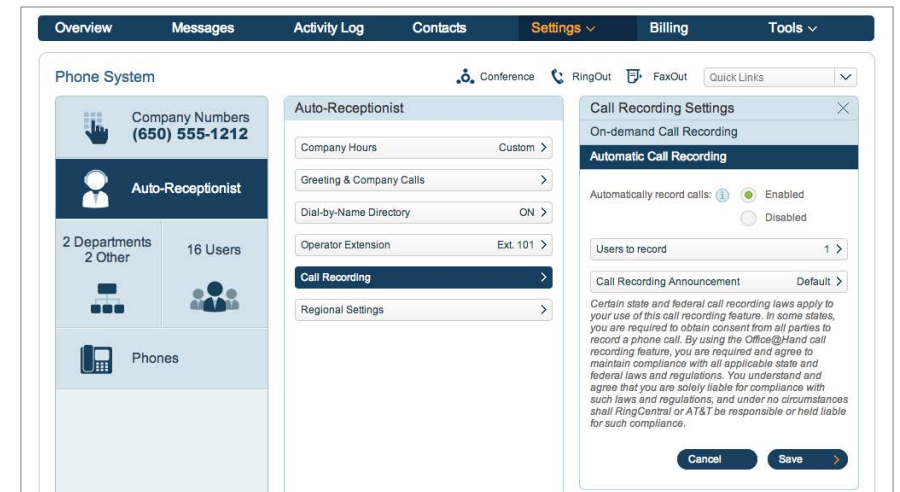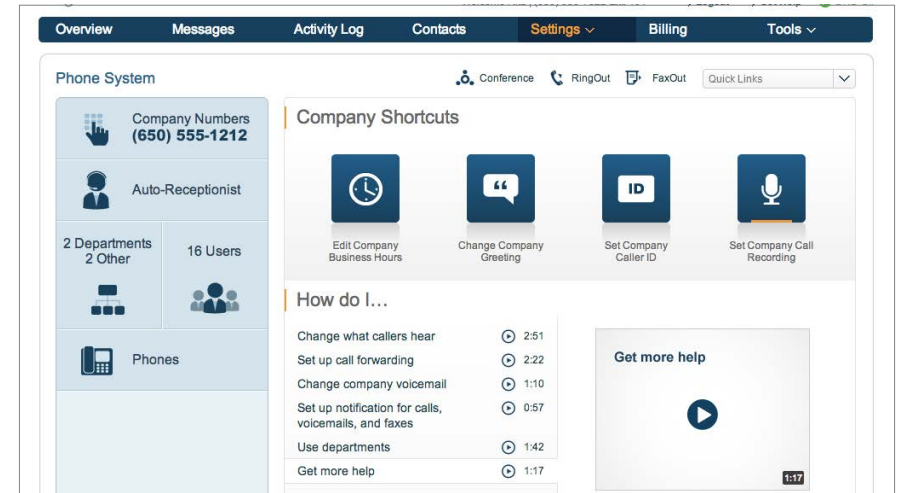
Next, click the **Users to record** bar and check Incoming and/or Outgoing for each user you wish to record.
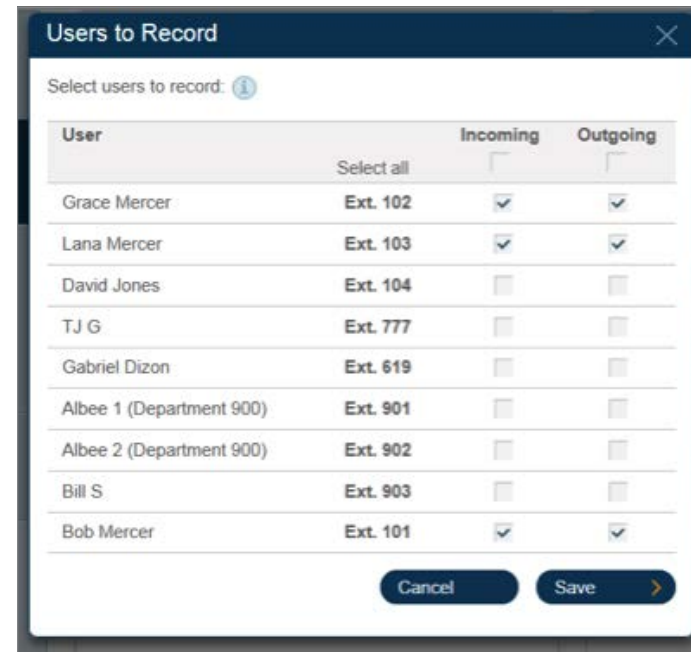
User receive an email alert that their incoming/outgoing calls are being recorded; when you deselect a user, that user will receive another email that their incoming or outgoing calls are no longer being recorded.

Once a user extension has been activated by the Administrator, Automatic Call Recording will record all of that extension's incoming and/or outgoing calls. Recordings are saved in the Administrator's call logs, where they can be played back individually, or downloaded as a group as MP3 files.

Recordings are saved in the cloud for 30 days. Download recordings to retain them for a longer period.

Users can also review and download their own recorded calls.

You must be subscribed to the Office@Hand Premium User Plan to use automatic recordings.

Users to Record			✕
Select users to record:			
User		Incoming	Outgoing
	Select all	☐	☐
Grace Mercer	Ext. 102	☑	☑
Lana Mercer	Ext. 103	☑	☑
David Jones	Ext. 104	☐	☐
TJ G	Ext. 777	☐	☐
Gabriel Dizon	Ext. 619	☐	☐
Albee 1 (Department 900)	Ext. 901	☐	☐
Albee 2 (Department 900)	Ext. 902	☐	☐
Bill S	Ext. 903	☐	☐
Bob Mercer	Ext. 101	☑	☑
		Cancel	Save ›

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Notifications

You can set your RingCentral account to notify users with email alerts or text messages when they have missed a call or fax, received a voicemail message or fax, or whether a fax was sent successfully.

1. From **Settings > Company > Phone System**, click **Users**. (On the mobile app tap **Settings > Administrator/Phone System**, then **Users**.)

2. Select a user from the list in the center panel.

3. In the right panel, click **Messages & Notifications**.

4. Then click **Notifications**.

5. Under **Notify me of**, choose the actions for which the user wishes to receive notifications.

6. Under **Send notificaton via**, click **On** if you'd like the user to receive email notifications and/or text messages. You can change the email address.

7. When finished, click **Save**.
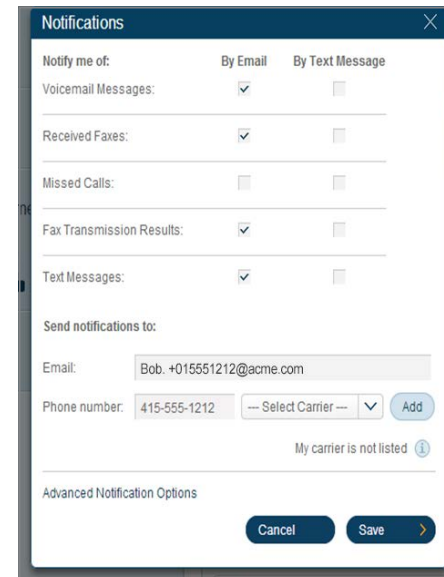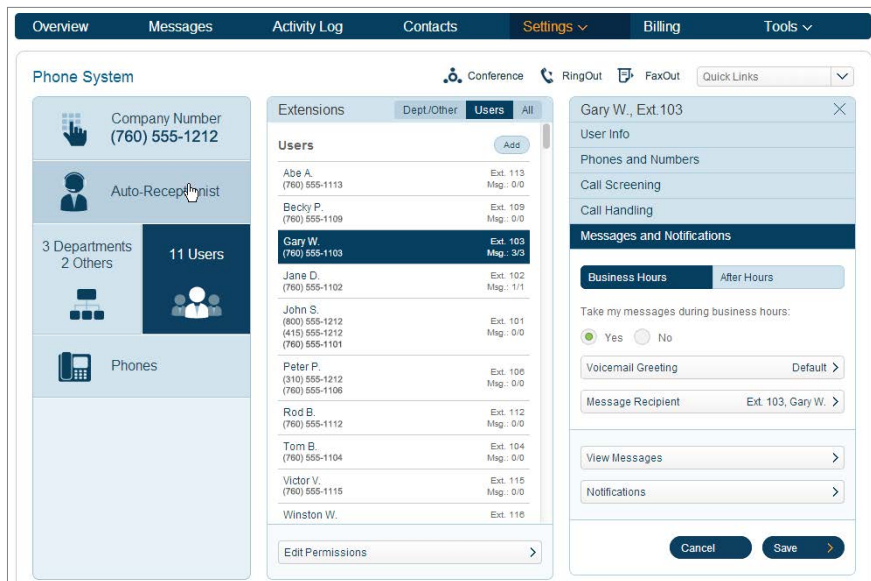
Advance Notification Options

Tap **Advanced Notifications**, which offers additional options for each type of notification (faxes, voicemail, missed calls, etc.).

- You can specify a different email address and text address To receive each type of notification.

- You can mark messages and faxes in your Web Inbox as 'read' after they are sent as notification attachments.

- You can send voicemail and fax notifications with or without the voicemail or fax attached.

User Phones and Numbers

In **Settings > Phone System > Users** click a particular **User,** then click **Phones and Numbers**.

Direct Numbers lists the phone numbers assigned to this user. Clicking the number displays a panel where you can determine the Number Type (Voice and Fax, Voice Only, Fax Only). You can choose whether calls to this number will be connected to the Auto-Receptionist for call-handling processing, or connected to an Extension, such as a department extension or a user extension.

1. **Add Direct Number**. You can assign a Direct Number for a user, choosing a local, toll-free or vanity number. Follow the process described under **Adding a Company Number**. You will see an Order Confirmation dialog with extra charges for the new lines.

2. **Add Phone** lets you add a desktop IP phone to this user.

   NOTE: Desktop phones are available for Premium users only. You will be offered the opportunity to upgrade Virtual Users to Premium. An Order Confirmation dialog will show the charges.

3. **Presence** lets you set the Presence feature for this user.

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Setting and Managing Presence

Presence is a feature of select RingCentral Office@Hand desktop IP phones that lets you see whether another user is on the phone – whether the user's desktop IP phone, Softphone, or smartphone. In an office environment, it is handy to know whether someone is on the line or on hold before forwarding a call to them, for example – or walking across the office to see them.

The Presence status of another user is displayed as labeled lights on your presence-capable desktop IP phone. For those who need to monitor Presence for many devices, add-on hardware ("sidecars") are available that add more monitoring lights to their desktop IP phone.

Administrators and users can select specific users they wish to monitor for Presence on Presence-enabled desktop IP phones; and each user can give or withhold permission to be monitored. Administrators can also set up phones for users, from the Office@Hand web site or from the Admin's mobile app.

(The mobile apps can manage Presence as described in this section; but the mobile apps themselves are not Presence-enabled and so cannot display the Presence status of others.)

To set Presence, go to **Settings > Company > Phone System > Users** and select a **User**. Then select **Phones and Numbers**, on the right, then click the **Presence** bar in the right-most panel.

In the **Presence** panel, click **Appearance**. If you have an Office@Hand Presence-enabled desktop IP phone that has lights that can display the Presence status of others, you will see a list of other users in your system. The first two "users" on this list are the user themselves. Click the **dropdown caret** by each available postion to choose other users you wish the user to monitor, on their Presence-enabled phone, for Presence status. (To cancel monitoring, click the trash icon to the right of that user being monitored.)

(If the selected user does not have phones that can display presence, you will instead get this pop-up message: *"Currently none of the phones on your extension can show presence. Phones with this capability can be purchased from RingCentral Office@Hand from AT&T by clicking Add Phone."*)

You can monitor as many users as the desktop IP phone is capable of displaying for Presence. A two-light desktop IP phone won't have Presence-monitoring capability. A four-light desktop IP phone can monitor two users (since the first two lights are dedicated to the user of that phone). Available desktop IP phones offer up to a dozen monitoring lights; sidecars can add dozens more.

The names of users being are monitoring are displayed on the desktop IP phone. To see what the desktop IP phone of the selected user will look like with Presence monitoring enabled, click **Preview on Phone**, then select one of the desktop IP phones to preview line appearance on the phone and on sidecars if any are installed.
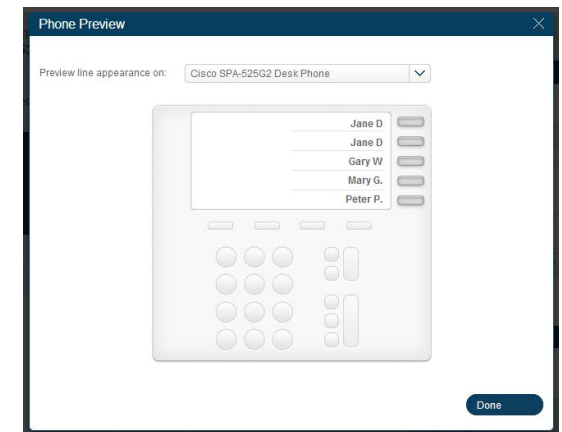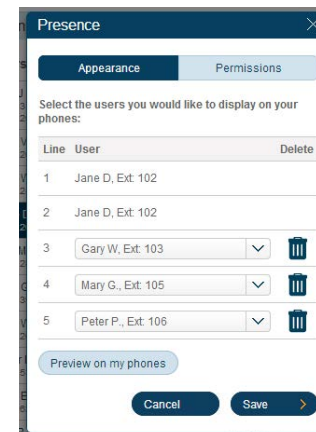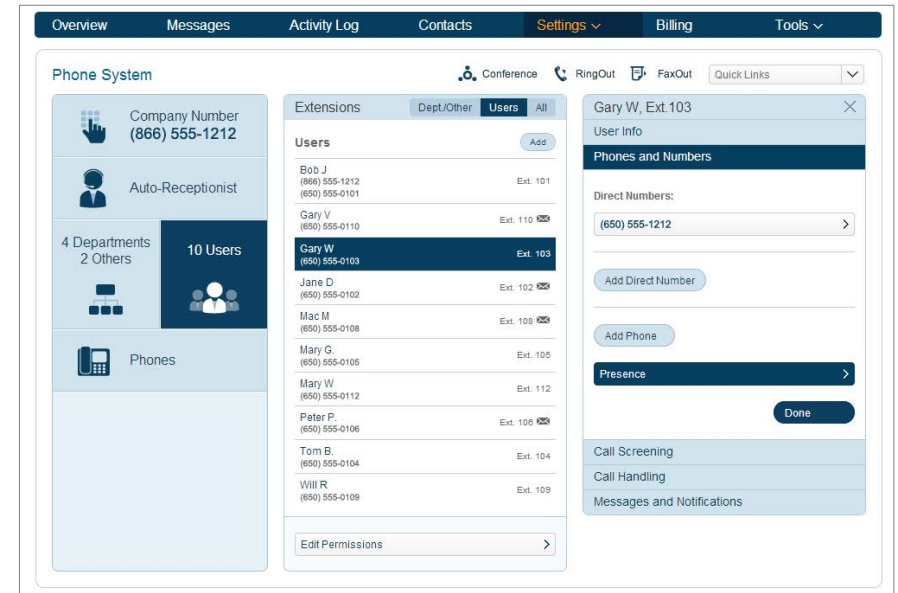
Users (and Administrators) can click **Permissions** in the Presence panel of their account and choose whether to allow others to see their Presence status – that is, whether their numbers/extensions are busy. They can also choose to allow specific users to answer their calls for them. In the **Presence** panel, click **Permissions** and click **On** to allow others to see the Presence of that user, then check the users who will be able to answer this user's phone calls for them. (This is especially useful for administrative assistants.) Note that Presence detects calls to numbers/extensions. No matter which actual device the call is sent to, the system detects that the number/extension is ringing, active, or on hold
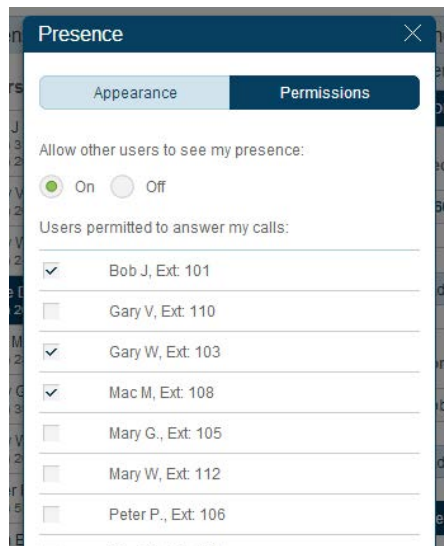
Adding Desktop IP Phones

As an Administrator, you can view of all the phones associated with your Office@Hand account. Administrators can add or delete Desktop IP phones or IP conference phones, and assign phones to users/extensions.

NOTE: Desktop IP phones are available for **Premium Users**. You can upgrade **Virtual Users** to **Premium Users** so they can use such deskphones. Only Administrators can add Desktop IP phones.

NOTE: Desktop IP Phones cannot be added from the mobile app. Administrators and Premium Users must log into their online account to add phones. However, they can use a Web browser on their mobile device to log into their online account and manage desktop IP phones.)

1. From the Phone System screen, click **Phones**.

2. On the **User Phones** screen, click **Add**.

3. Select the **phone** that you would like to add. Click the name of the phone to see a description of its features. Scroll down to see more phones.
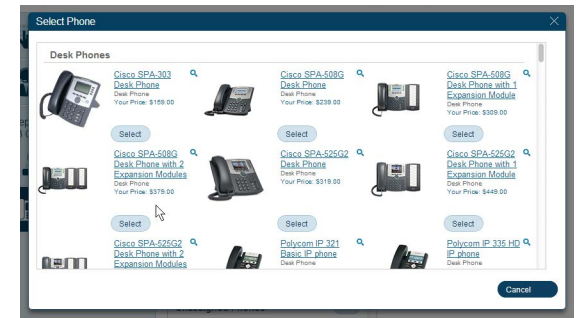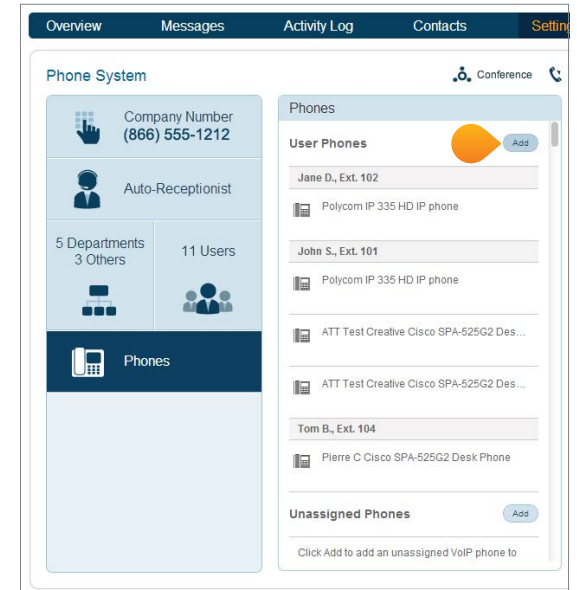
4. Register your **E911** location (the physical address to be used in the event of a 911 emergency call). (E911 information is required by law; your service will not be activated until this information is provided.)

5. Click the acknowledgement **checkbox** at the bottom of the form.

6. Click **I accept**.

7. You will be given the opportunity to add more phones, or to proceed to checkout.

8. At Checkout, select your shipping option and Shipping Address and click **Next**

9. Confirm your order by checking the acknowledgement box.

10. Click **Next**.

11. You may now print your **Order Confirmation Receipt**. Click **Done**.

RingMe Click-to-Call

RingMe generates code you can embed in a Web page to display a "RingMe" button. Visitors can click this button to call your Office@Hand phone, thus making it easy for potential customers to contact your business by phone.

The RingMe code can also be placed in email signatures, online ads, or any online document. Your Office@Hand call logs will identify RingMe as the call source, for convenience in managing and evaluating your RingMe placements.

Find the RingMe feature under **Tools** on the right side of the Web site toolbar.

On the **RingMe Options** page, select where the call is to be routed – the **Auto-Receptionist**, or an extension.

Next, click **Select a button style** and, on the pop-up window, choose to create a **Text Hyperlink**, or choose one of the 30 RingMe large or small buttons to be displayed. You can also select a background color (in shades of gray) for the button. Click **Save**.

Check **Use SSL** mode to use this security feature, which encrypts the information sent over the Internet when the button is clicked by a customer.

Check **Require caller to enter security image confirmation code** to generate a security box that requires the user to type in a code displayed in an image; this will reduce spam calls generated by robot programs.

Preview and test by clicking the RingMe words or button. The popup is what your customers will see when they click the RingMe text or button: It asks for the customer's phone number, how long to wait before calling, a **Code from Image** data-entry box if you checked the security-image option, and a green **Call** button.

In order to generate a call that is free to the customer, the Office@Hand system first calls the customer and, when the customer answers, then calls the Office@Hand number or extension. Since Office@Hand is calling the customer, the customer incurs no charge.

Close the test window.

Under the label **<HTML>** you will find the code that has been generated based on your choices. By default, the code uses **JavaScript**; you can optionally choose to have it generated without JavaScript, or to use a **URL hyperlink**, in case the site in which you are placing the code has technical issues with the other choices.

Now highlight and copy the generated code. Embed this code in the source to your chosen Web site page, or place it in your email signature block, or put it in any digital document.

Inbound calls received from RingMe will follow call-handling rules for that extension. Call logs for that extension will show the URL of the page hosting the RingMe link.

Deleting Extensions/Assigning and Reassigning Desktop IP Phones

When an employee leaves, you can **delete their extension**. Any desktop phones assigned to them go into the Unassigned Phones list, from which they may be reassigned to users/extensions.

From **Settings > Phone System > Users** select the departing user. Under **User Info**, select **Delete Extension**.

A pop-up will warn that deleting the extension will also delete any messages, greetings, rules, and recorded calls and these cannot be recovered.

If the user has a desktop IP phone assigned to that extension, you will see a pop-up asking if you wish to keep the extension(s). If you do, the phone(s) will go to the list of unassigned phones.

To **reassign** a desktop IP phone to a different user/extension, go to **Settings > Phone System** and click **Phones**.

To **reassign** a phone to a different user, choose the phone, then click the dropdown menu under **Assigned To:** and select another user/extension. Click **Save**.

To **Assign an Unassigned Phone**, scroll down in the center **Phones** panel to the section that lists **Unassigned Phones**. Choose a phone, and in the right-hand panel, click **Setup and Assign**.

Details of the phone you selected and its plan are displayed. Click **Next**.

In the **Name New Phone** pop-up window, assign the phone to a user/ extension. You can optionally give the phone a nickname or designation for ease of reference. Click **Next.**

Fill in the required E911 form with a valid street address, check the box to accept its terms, and click **Save**.

This phone will now appear in the phones list of the user/extension selected.
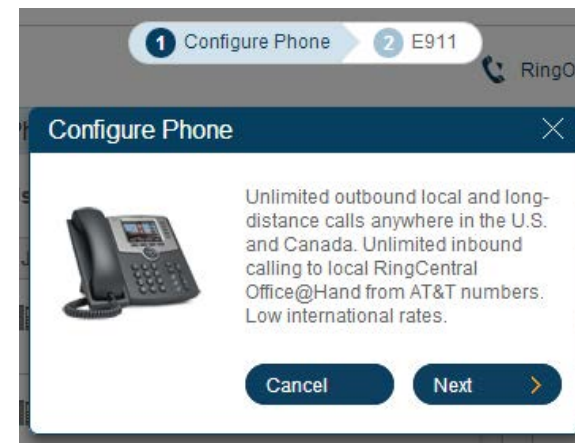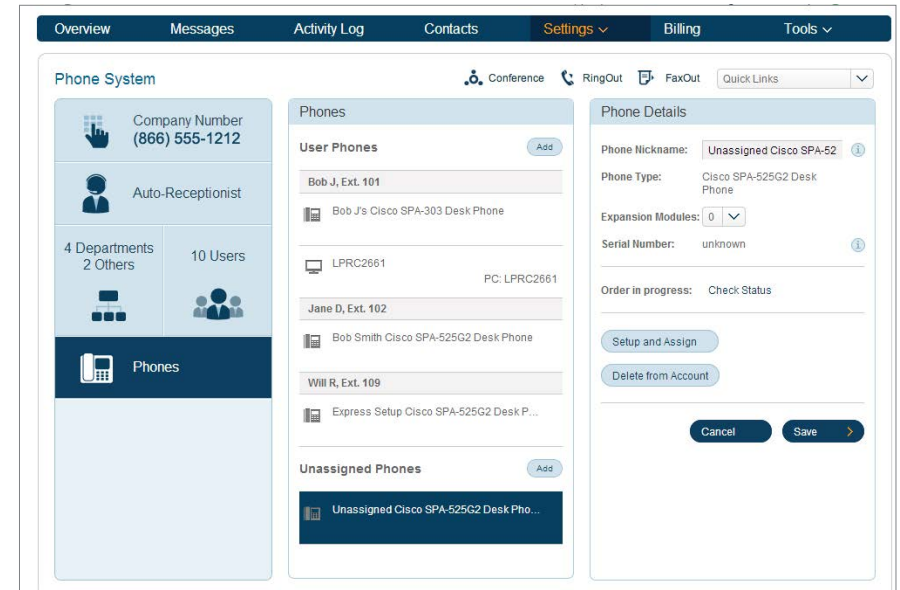
The RingCentral Office@Hand from AT&T Softphone

The RingCentral Softphone is a custom call-controller application for

desktop or laptop computers that gives access to all the Office@Hand phone features. Users can make and answer calls through the Softphone and the computer's microphone and speakers or headset They can send and receive faxes, access their contact list, listen to voicemail, screen calls and voicemail while it is being left, transfer calls, speed dial numbers, and manage some settings:

RingCentral Softphone supports Windows XP, Windows Vista, & Windows 7, and also Mac OS 10.5X Leopard or newer on the Macintosh.

Downloading the RingCentral Softphone

1. Log into your Office@Hand account at http://service-officeathand.att.com

2. Click **Tools** in the menu bar, and select **Softphone**.

3. On the left, under **Download**, click **Download for PC** or **Download for the Mac**. The system may recognize your computer type and offer you the appropriate version automatically.)

4. Doubleclick the downloaded program and install.

5. When you have completed the installation, fill out your credentials in the authentic dialog box and click **OK**.

6. Open the Softphone to explore and use its features.

You can also find the Softphone download under **Settings > Personal > My Inbound > Phones and Numbers**. Click the **Download/Activate Apps** button.
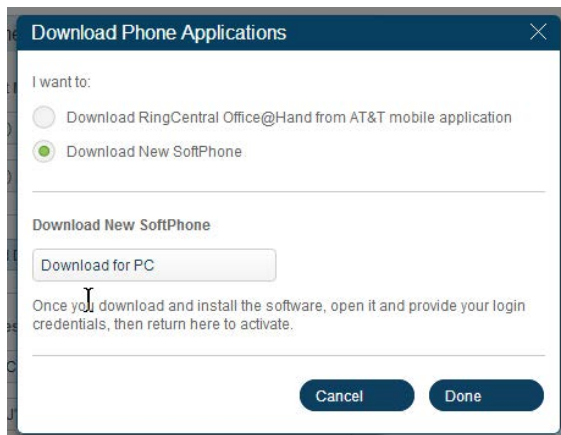
This displays a window that offers several choices, including downloading the mobile apps for smartphone. Click **Download New Softphone**, choose your type of computer if asked, and install.

To Activate the Softphone

Then return to this menu and click **Activate Existing Softphone.** You are asked to **Select SmartPhone to Activate** – since you can only install one Softphone at a time, there will only be one choice, usually in the form of a code corresponding to your computer's internal name. Select this, then fill out the **E911 Registered Location** information form that appears. (E911 registration is legally required; your service will not be activated until this information is provided.) When you finish, the Confirmation message will tell you to restart the Softphone. It will now be activated and you will be able to receive and place voice calls.

NOTE: Outbound calling from the Softphone is a feature available only to Premium users. Virtual users can receive incoming calls but not make outgoing calls using the Softphone.

Using the Softphone

The Softphone **main screen** has a dial pad for making phone calls, and, across the top, icons for its main features, which are:

Messages – clicking this displays your Inbox, Sent Messages, Recent Calls, etc. You can also display selected messages on the Softphone screen itself by clicking the word **Messages** just below the icon.

The **phone icon with the checkmark** displays a pop-up with your recent messages.

Clicking the **phone icon with the square block of lines** opens a window showing your online call log.

Clicking the **icon that looks like a piece of paper** with a curled edge opens the dialog for creating and sending a fax.

The rightmost icon, a **boxed list**, opens your online account in a browser window.

There are also icons about limited **Emergency 911 service**, turning **Do Not Disturb (DND)** on or off, and a quick link to showing all messages, and the **Overview** list.

Clicking the **Menu** button at the top left of the Softphone brings up a menu of additional functions you can perform with your Softphone.
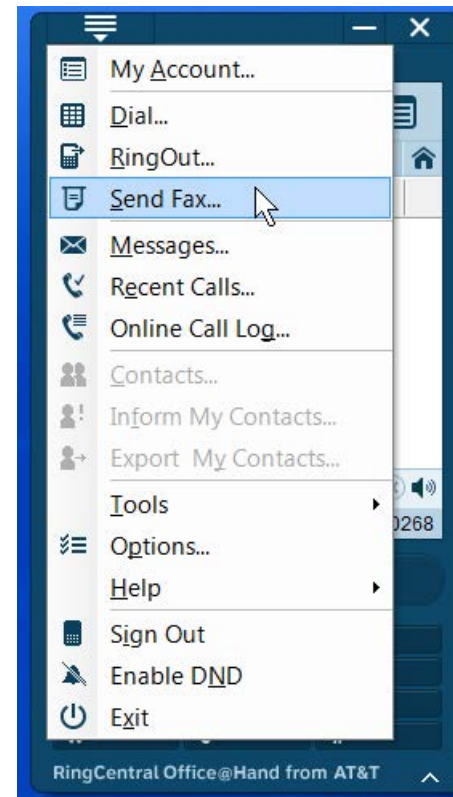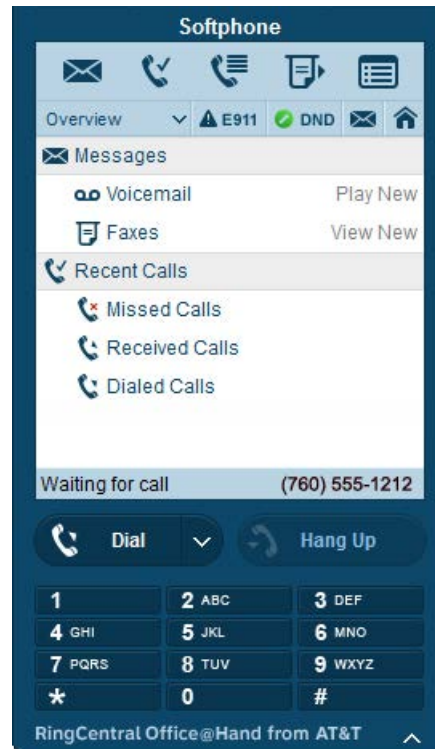
Office@Hand App for SalesForce.com

The RingCentral App for Salesforce.com is available to the Office@Hand Premium User Plan subscribers who are also subscribers to Salesforce.com.

The RingCentral Office@Hand App for Salesforce.com provides seamless integration between Salesforce.com and your RingCentral services to enable improved customer retention, agent productivity, and advanced business processes.

The app runs in your Salesforce account, and uses your RingCentral Softphone for dialing and call handling. You can call contacts from within Salesforce by simply clicking on their phone number.

For incoming calls, the app automatically brings up the matching contact record. You can log notes during or after the call, and work multiple interactions on separate tabs.

Detailed reporting on calls is also available within Salesforce.

The Office@Hand Softphone must be installed and running on the user desktop.

Your Salesforce System Administrator will need to set up the Salesforce instance before it can communicate with the App. Detailed instructions

for the System Administrator can be found in the **Office@Hand App for Salesforce.com Administrator Guide.**

To Download and Install the Office@Hand App for Salesforce.com

1. Download the RingCentral App for Salesforce from Tools menu of RingCentral account online, or from Salesforce AppExchange.

2. The App installation process will restart the RingCentral Softphone.

3. If the RingCentral Softphone does not restart automatically, exit the Softphone manually and restart it for the configurations to take effect.

4. Login to Salesforce.com through your browser and notice the RingCentral App for Salesforce login form in the left navigation sidebar (Figure 1).

5. **NOTE:** If the left navigation sidebar is hidden, you may need to pull it out.

6. If you see a **Connect CTI Adaptor** button, refresh the page.

See the **Office@Hand App for Salesforce.com User Guide** for detailed information on using the App.

The RingCentral Office@Hand from AT&T Smartphone Mobile App

Using the Office@Hand mobile app, the Administrator can configure and manage almost the entire RingCentral phone system settings from a smartphone, performing virtually all the same functions available to you through the Web browser interface.

Download the RingCentral Office@Hand from AT&T Smartphone Mobile App

To download the RingCentral App for your select smartphone, visit the appropriate app store, search for and **Office@Hand.**

Once installed, log in using your RingCentral number and password.

For instructions on use of these mobile apps, see the separate Mobile Guide for Administrators, Mobile Guide for Department Managers, and Mobile Guide for Users.

The Office@Hand Support Home Page

The Office@Hand Support Home page at http://support-officeathand.att.com/ has support on the most popular topics, the Knowledge Base, tutorial videos, additional user guides, and Support department contact information.