

Setup and Use RingCentral

PURPOSE:

1. Set up phone system
2. Place outgoing calls.
3. Receive incoming calls.

PROCEDURE:

Expected Time Frame: As needed.

1. Complete initial setup
 - a. Create an account with RingCentral.
 - b. Download the RingCentral App to your computer and your phone.
 - c. Click on Auto Receptionist to set the following:
 - d. Company hours
 - e. Company greeting - standard or custom
 - f. Example custom greeting: *Hello and welcome to the California Center for Functional Medicine. If this is a medical emergency, please hang up and dial 9-1-1 or visit your local medical facility. Our phone system is designed for voicemail only. If you know the extension of the person you would like to speak with, you may dial that extension at any time. Otherwise at the tone, please leave your name, contact phone number and your specific request. Your message will be queued to the appropriate staff member to return your call within 48 business hours. We do have an operator answering calls on Mondays, Wednesdays and Fridays (excluding holidays) between the hours of 9 and 11 am Pacific Time, if you would like to call back during that time. Thank you for calling the California Center for Functional Medicine.*
 - g. Dial by name company directory - set extensions for each user
 - h. Set the extension and hours for the operator
 - i. Call RingCentral to add a digital line for any person needing to make calls through their computer (this is an additional cost)
2. Send emails to all employees welcoming them to RingCentral and giving them their extension number. Instruct them to do the following:
 - a. Download the RingCentral App to their computer and phone.
 - b. Create login credentials (username and password).
 - c. Login with their credentials and set up personal voicemail or leave the standard greeting.

- d. Make a test call by launching the RingCentral app, clicking on the telephone symbol on the blue dashboard, entering a phone number to call and then hitting the green telephone symbol.
 - e. Ask someone to call them to test incoming calls to their new number.
3. To add a new employee:
 - a. Login to RingCentral
 - b. Click on Auto Receptionist
 - c. Add an extension and add the employee's name and email address
 - d. Call RingCentral if a digital line needs to be added
 - e. An email will be sent automatically to the employee for set up