

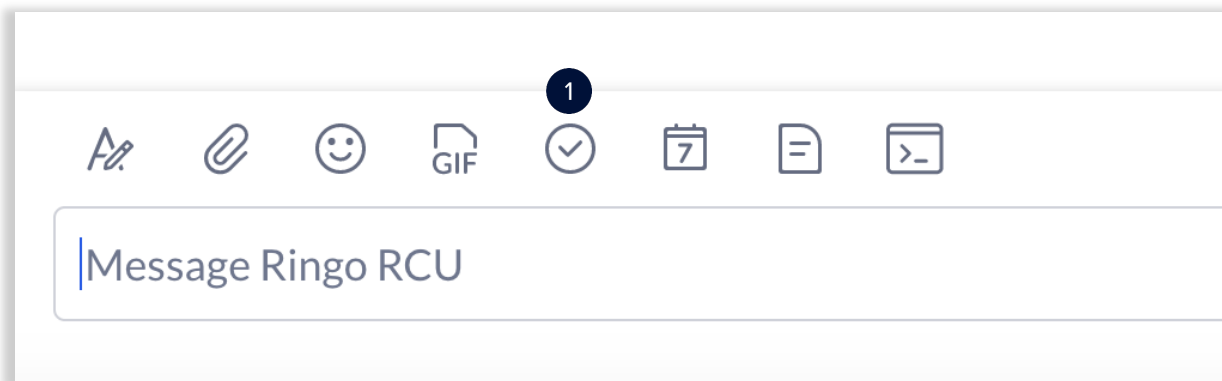
RINGCENTRAL APP: CREATING AND MANAGING TASKS

This job aid guides you on how to create and manage tasks within the RingCentral app. You can add tasks to individual, group, and team conversations, to help track your organization's tasks within one application.

CREATING A TASK

Follow the steps to create a task:

1. Click **New Task**.



2. Enter a Task title. This is the only required field.
3. You may create a new or use an existing category.
4. Type the assignee names. You may assign the task to yourself for tracking purposes or assign a task to one or more team members.

New task (Ringo RCU)

Task title

2 Script Review - Creating and Managing Tasks

Team

Ringo RCU

Category

3 script

Assignees

4 Ringo RCU ×

Start date	Due date	<div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Product Script Review RCU Video Script Review Final Internal Script Review Final Script Review </div>
Pick a date	Pick a date	
Repeat	None	
Complete when	Checked	

5. Enter a start date, due date, and due time.
6. Select the task recurrence.

The screenshot shows a task creation form with the following elements:

- 5** Start date: 3/12/2021 (with a calendar icon)
- Due date: 3/13/2021 (with a calendar icon)
- Due time: 12:00 PM (with a clock icon)
- 6** Repeat: A dropdown menu is open, showing options: None, Every day, Every weekday, Every week, Every month, and Every year.
- Complete when: (label visible)
- Color tag: (label visible)
- Attachment and emoji icons.
- Enter task description: (text input field)

7. Choose how you want the task completed:
 - a. **Checked** – Any one of the assignees can mark the task as complete.
 - b. **Checked by all assignees** – All assigned members check the task for it to complete.
 - c. **100% done** – Task can be marked by incremental percentages until it is complete.

The screenshot shows the 'Complete when' dropdown menu with the following options:

- 7** Complete when: a. Checked (selected), b. Checked by all assignees, c. 100% done
- Color tag: (label visible)
- Attachment and emoji icons.

8. Assign a color tag. Use this option for easier identification when you have multiple tasks.
9. Click **Attach** to attach a file.
10. Complete the task description.
11. Click **Post and new** to post and create another task or **Post and close** to post and close the task window.

The screenshot shows the final task creation form with the following elements:

- 8** Color tag: A row of color swatches (black, red, orange, yellow, green, teal, blue, purple) with the red swatch selected.
- 9** Attachment and emoji icons.
- 10** Description: "Hi, Please see attached file for review. Thank you!"
- Attachment: "Storyboard_Creating_And_Ma..._V1.docx" (with a close icon)
- Rich text formatting options: *italics* **bold** _underline_ ~~strikethrough~~
- Buttons: Cancel **11**, Post and new, Post and close

MANAGING A TASK

Follow these steps to manage a task:

1. Users can manage tasks from the conversation pane to:
 - a. React with an emoji
 - b. Edit
 - c. Pin
 - d. Bookmark
 - e. Delete
2. Everything in Tasks and more displays for all groups, teams, and individual conversations. Click the **Tasks and more** icon to show the following:
 - f. Tasks
 - g. Events
 - h. Files
 - i. Notes

