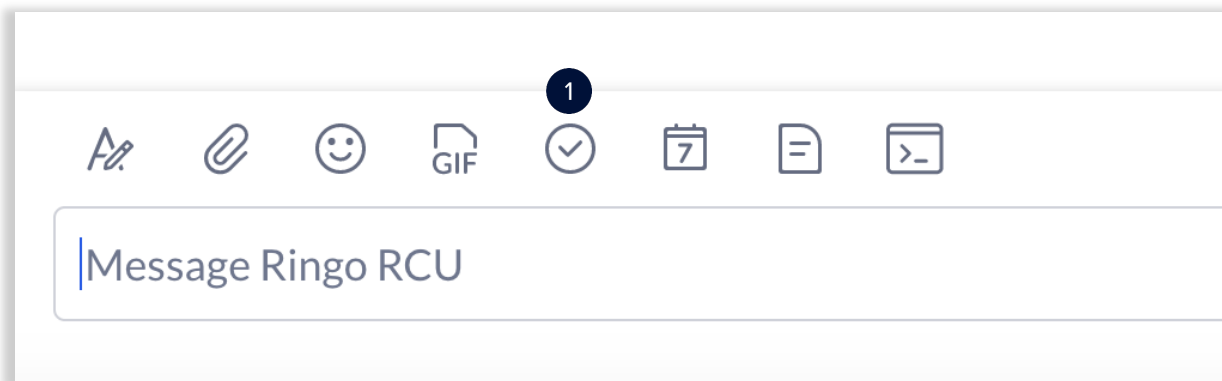# RINGCENTRAL APP: CREATING AND MANAGING TASKS

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.

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

Start date	Due date	Due time
⑤ 3/12/2021 📅	3/13/2021 📅	12:00 PM 🕐

⑥ Repeat

Complete when

Color tag

📎 ☺

Enter task description

None
Every day
Every weekday
Every week
Every month
Every year

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.

⑦ Complete when

Color tag

📎 ☺

ⓐ	Checked
ⓑ	Checked by all assignees
ⓒ	100% done

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.

⑧ Color tag ⚫ ✅ 🟠 🟡 🟢 🔵 🔵 🟣

⑨ 📎 ☺

⑩ Hi,
Please see attached file for review. Thank you!

📄 Storyboard_Creating_And_Ma..._V1.docx ✕

italics **bold** __underline__ ~~strikethrough~~

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