# MVP User Basics

Training Guide

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RingCentral App

Introduction to the RingCentral App

The RingCentral app is a unified communications platform that enables you to make and receive calls, send text and chats, send faxes, and start video meetings wherever you are – everything you need in one app.
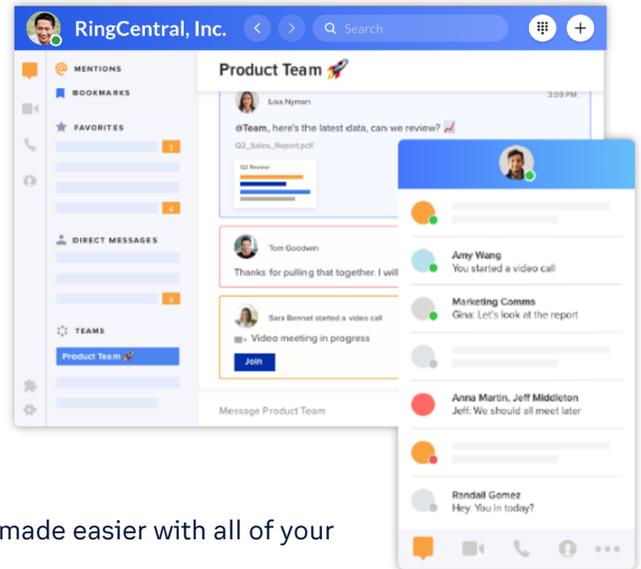
Message. Video. Phone.

From sharing ideas to team collaborations, communicating is made easier with all of your conversations in one place:

- **Team Messaging** – Send messages, share files, setup events, and manage tasks.
- **Video Meetings** – Start a meeting straight from a conversation.
- **Business Phone** – Utilize the built-in phone system to never miss a call.

Intuitive user experience

Re-engineered from the ground up to bring you a new user experience. It's easy to use, simple tonavigate, and works on any device.

Device and mode switching

Send a message, start a video meeting, or jump on a phone call from your browser, mobile, or desktop app. You can also flip live calls and meetings between any device when you are on the go. Plus, switch from a call to a video meeting and vice versa with a single tap.

Integrations

Integrate apps that are vital to all roles within your organization, with over 180 integrations in the RingCentral app gallery.

RingCentral App:
Getting the Most Out of the RingCentral App

The RingCentral app does more than enable virtual meetings. It lets you organize workflows with team messaging, file sharing, and task management. Team collaborations are easier and more personal with audio and video. Let's show you some of the most important functions of the RingCentral app that let you efficiently work, learn, and communicate with others.

Create Teams for Internal and External Groups

Enable collaboration, share agendas, and bring everyone together in teams.

1. Click **Create team.**
2. Enter the team name, members, and team description.
3. Customize the team permissions.
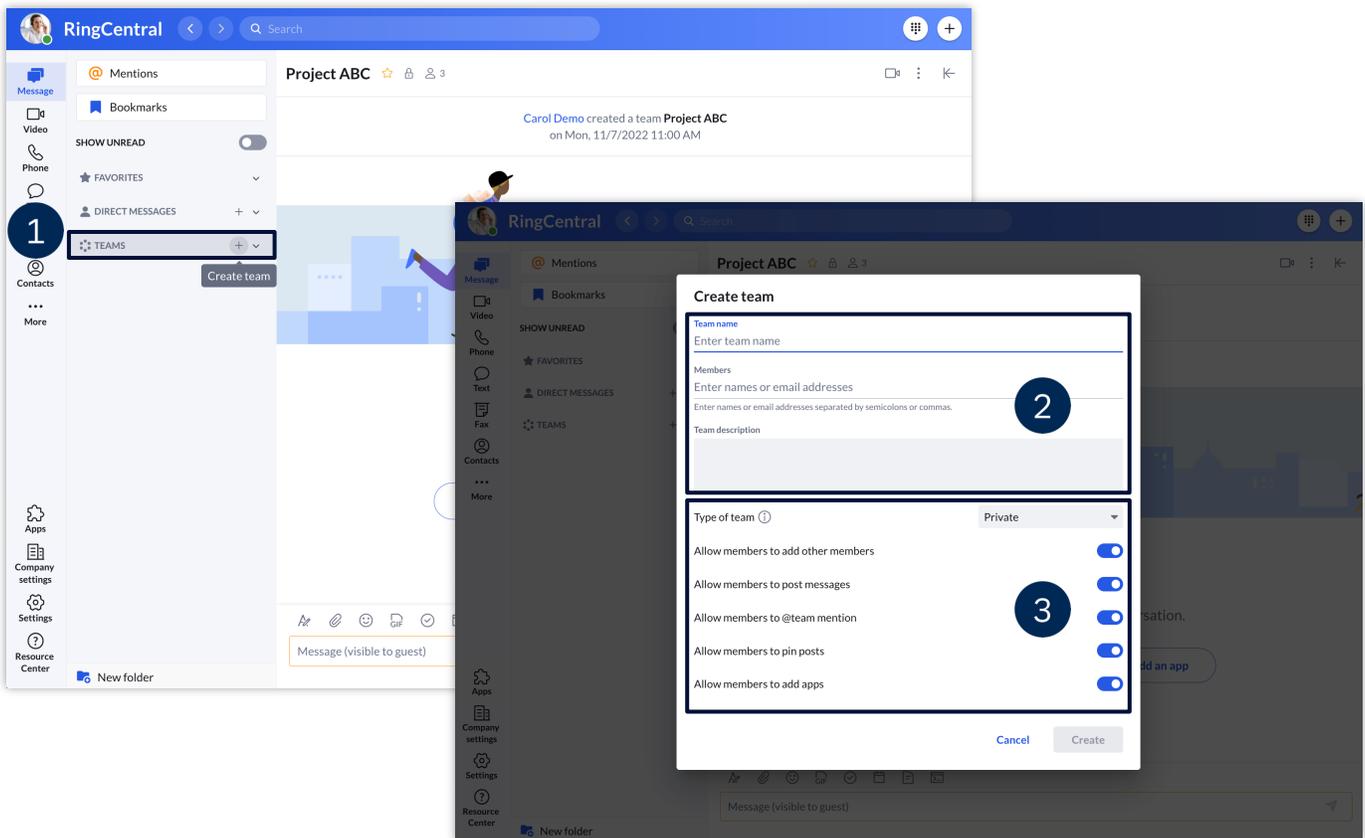
Change Audio Sources

Switch your speaker and microphone audio sources at any time within the app to improve communication and customize your audio experience.

1. Click **Settings**.
2. Click **Notifications and audio**.
3. Select the **Microphone**, **Speaker**, and **Ringer** sources.
   Note: If you are using a supported headset, toggle **Headset controls** on to use the buttons directly on your headset.
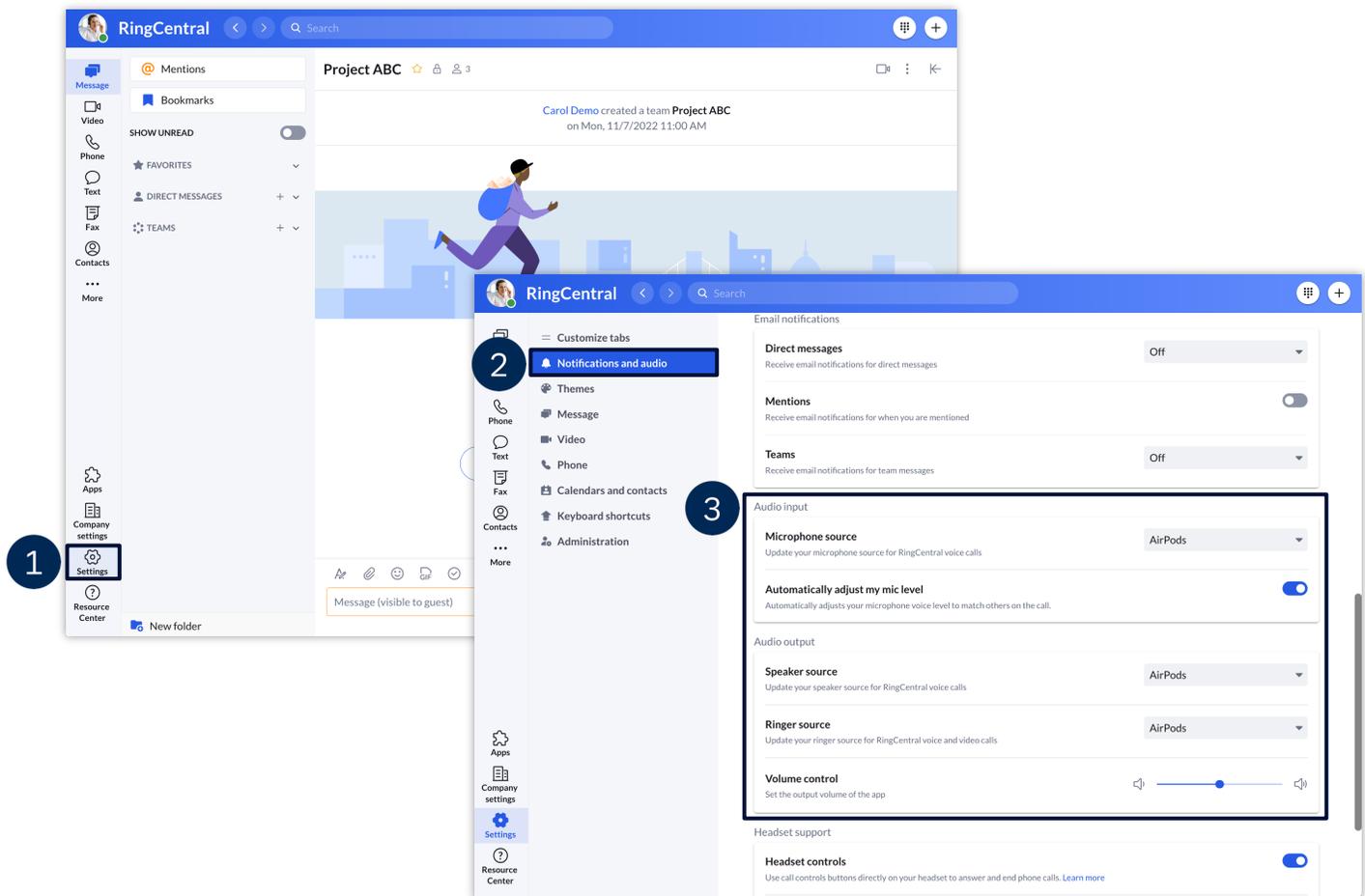
Connect your Calendars and Contacts

Connect your Microsoft or Google accounts to view and join upcoming meetings on your RingCentral app.

1. Click **Settings**.
2. Click **Calendars and contacts**.
3. Choose the account to sync.
4. Click **Connect**.
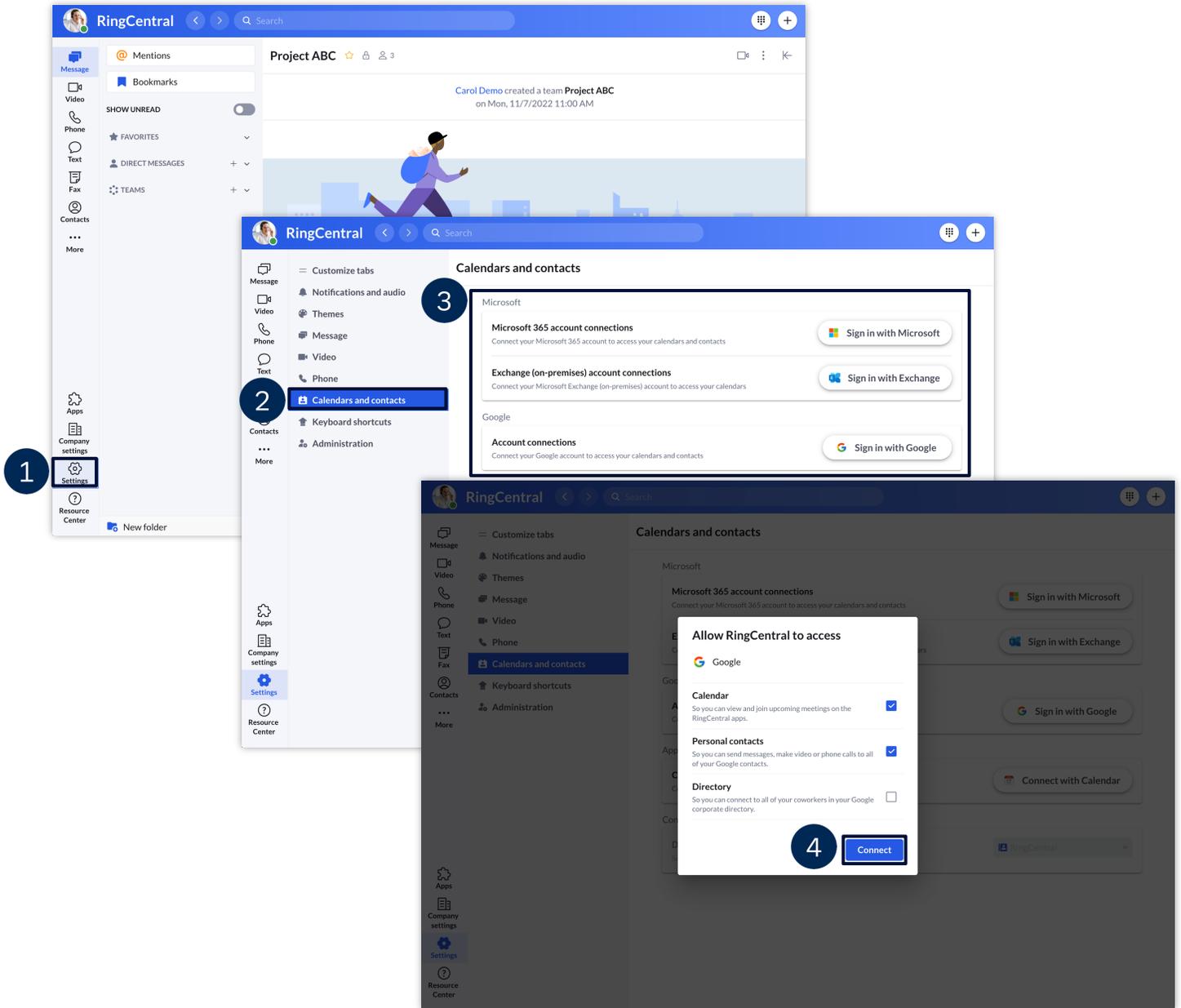
# Integrate Third-party Apps

The app integration feature lets you extend the capabilities of RingCentral products. The RingCentral app offers ready-to-use integrations and add-ins that can be accessed from within the app. Note that the app installation experience may vary as this depends upon the app itself.

1. Click **Apps**.
2. Select from the **Discover apps** tabs to browse from the different app types you can add. Select from the **Products** tabs to view the apps that you can integrate into Message, Video, and Phone.
3. Open the desired app and follow the installation instructions.
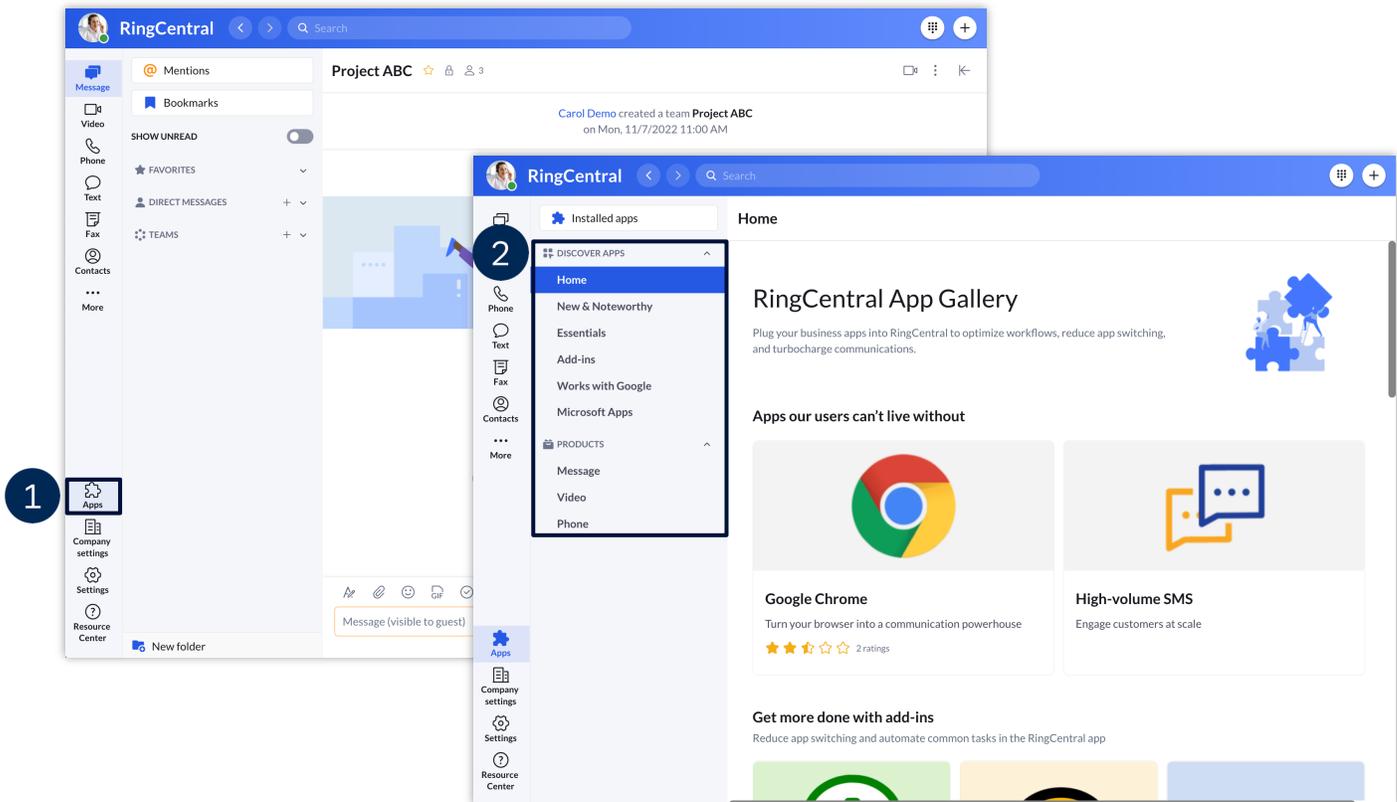
# RingCentral App: Adding Contacts

Adding contacts in the RingCentral app is easy and straightforward, making connecting with clients and business partners a quick and painless experience. Follow these steps to learn how to complete this process:

1. Click **Contacts**.
2. Select **All contacts**.
3. Click **Create new contact**.
4. Complete the new contact's details.
5. Select your preferred contact source in the Source drop-down menu. You can choose to use your Microsoft or Google account as a contact source, if you have them synchronized with your RingCentral app.
   a. Click **Expand** to enter additional contact details, like address, birthday, or webpage.
6. Click **Save** to finish.
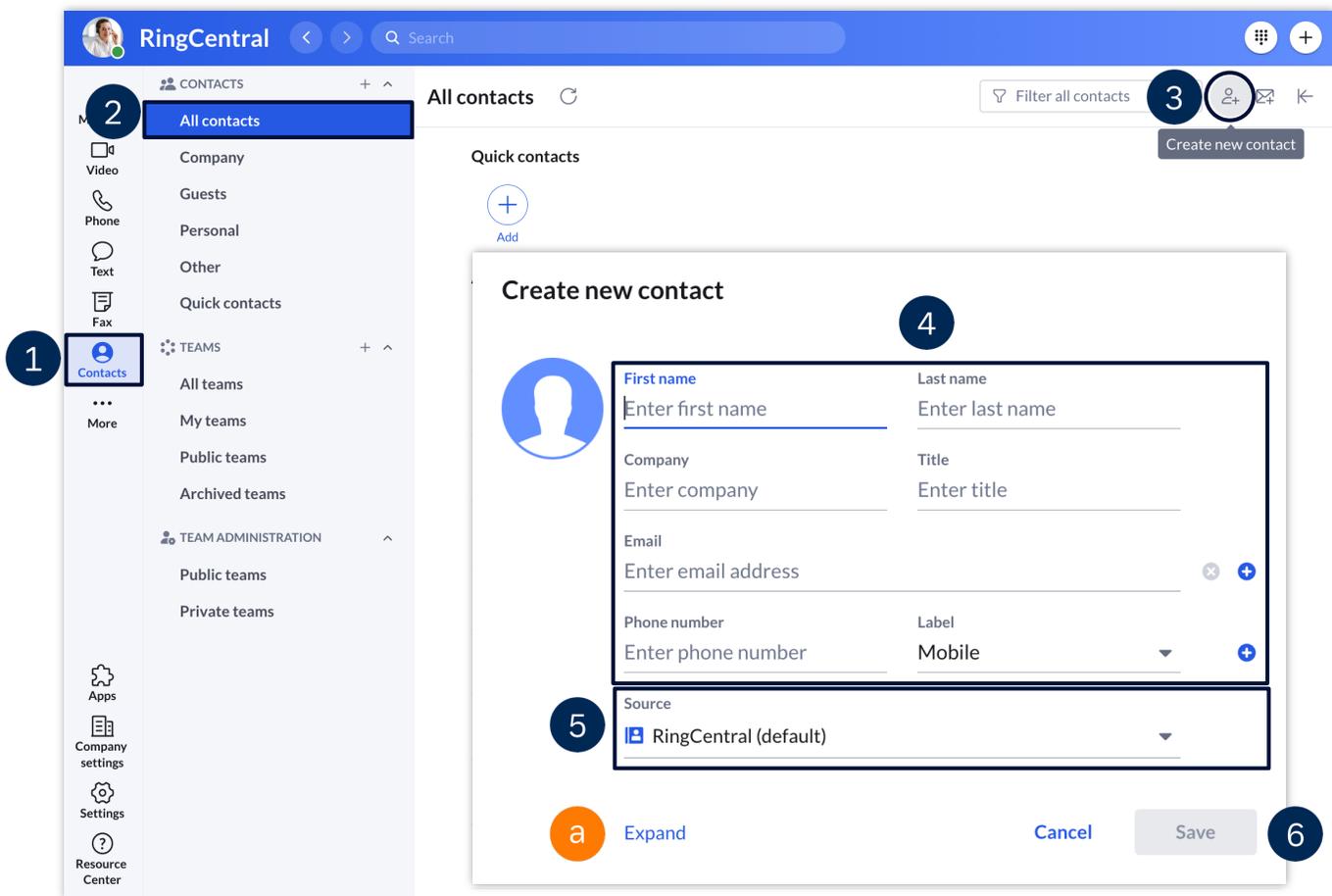
RingCentral App: Synchronizing Your Google and Microsoft Contacts

You can synchronize your Microsoft Outlook or Google contacts to your RingCentral app. This feature makes it easier for you to connect with the people inside or outside your organization. To synchronize your Microsoft Outlook or Google contacts, use the following steps:

1. Click **Settings**.
2. Click **Calendars and contacts**.
3. Click Sign in with Microsoft, with Exchange, or with Google.
4. In the Connect contacts and calendar window, check **Contacts**.
5. Click **Connect**.
6. Follow the sign in process for your Google or Microsoft account to finish and allow access.
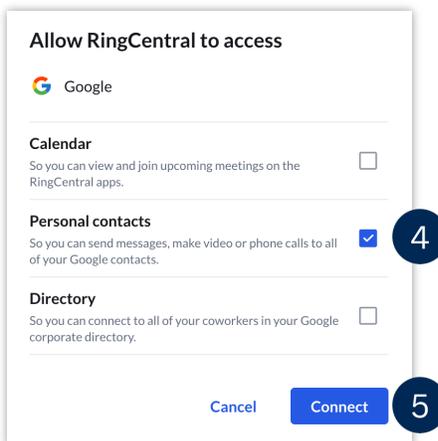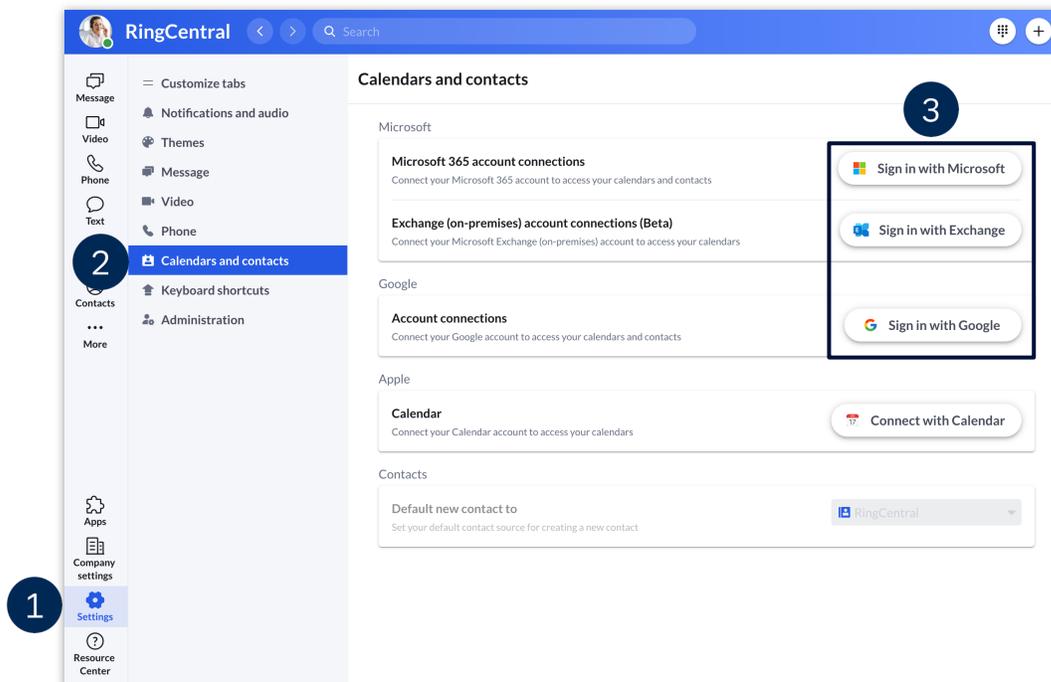
Viewing Your Contacts

To access your synchronized contacts, do the following steps:

1. Click **Contacts**.
2. Click **Personal**.
   Note: Your contacts are tagged with a Google or Microsoft icon to indicate their source.
3. Hover your mouse over a specific contact to see your available actions or click to view more details.
   a. **Phone** – Calls the contact.
   b. **Text** – Sends an SMS to the contact.
   c. **Open profile** – Opens the contact's profile and allows you to edit it.
      Note: Any changes made on the contact details reflect on your Google or Microsoft account.
   d. **Invite by text** – Sends a SMS invite to the contact to join your organization's RingCentral app as a guest.
   e. **Delete** – Deletes the contact.
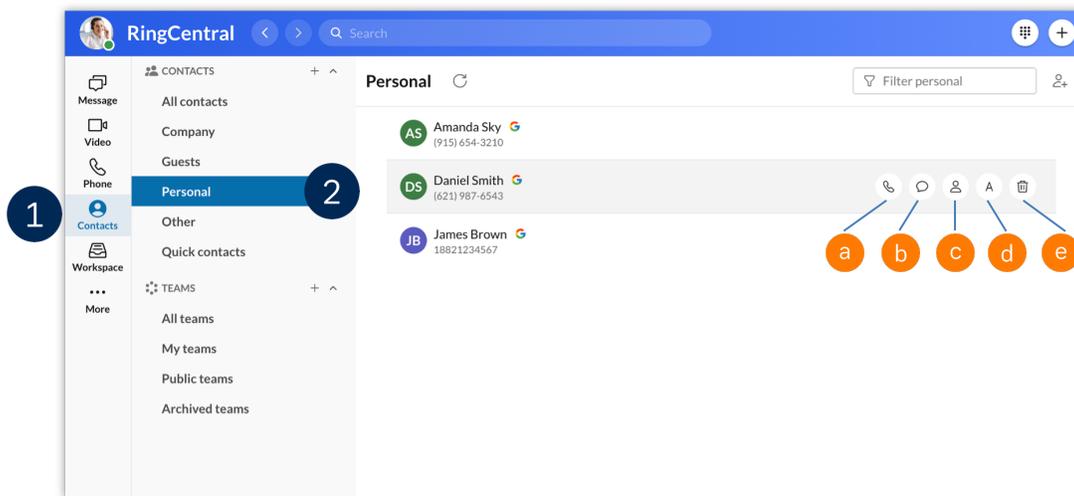
RingCentral App: Configuring Important Settings

Before using the RingCentral app, take time to configure some important settings that enhance your user experience, so you can have an easier time collaborating and be more productive.

Set Your Notifications and Audio Preferences

Setting your preferred desktop notifications and sound settings helps you stay updated whenever you get new messages or incoming voice and video calls. Access these settings by following these steps:

1. Click **Settings**.
2. Click **Notifications and audio**.

Then, modify the following settings according to your preference:

a. **New messages** – Choose if you want desktop notifications for all new messages or for only direct messages and @mentions. You can also turn this setting off, so you don't get any desktop notifications for any new messages.
b. **Incoming calls** – Allows you to enable or disable desktop notifications for incoming calls.
c. **Missed calls and new voicemails** – Enables or disables desktop notifications for missed calls and new voicemails.
d. **Sounds** – Lets you choose your preferred notification sounds for direct messages, @mentions, team messages, incoming voice calls, and incoming video calls. Notification sounds make it easy for you to determine the kinds of incoming communication you are getting.
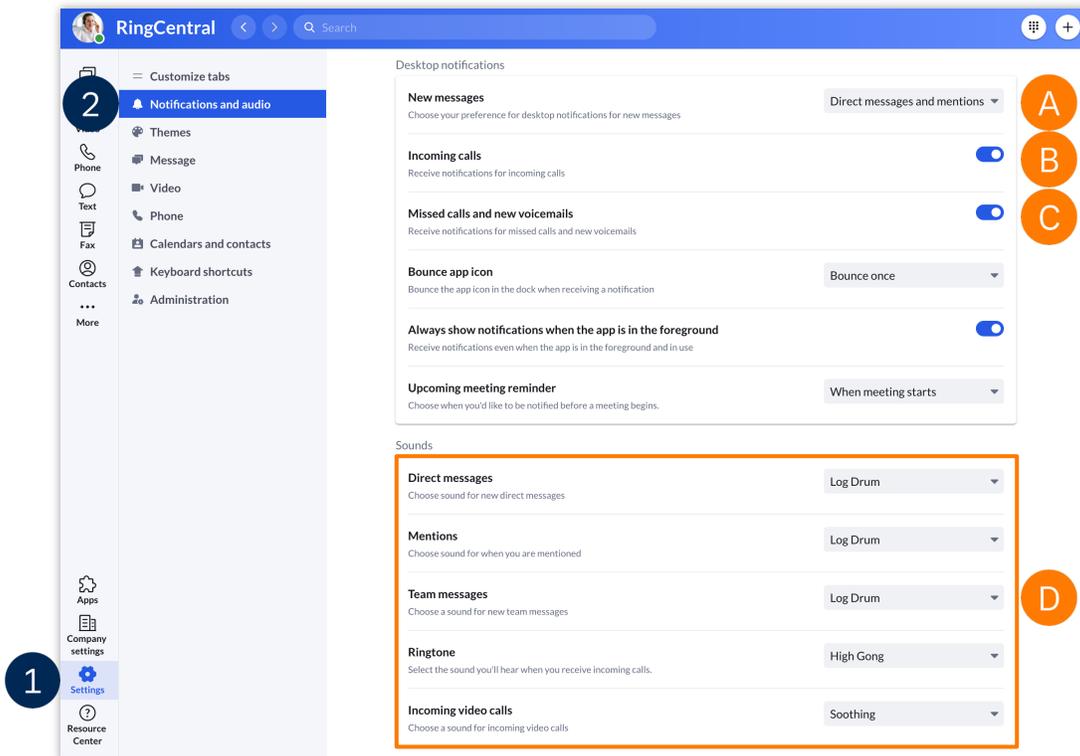
Set Your New Message Badge Count

Setting your new message badge count according to your preference allows you to choose how the RingCentral app updates your new message badge counter, so you can easily determine when to check the Message section for new messages. We recommend that you set this to "Direct messages and mentions only," so the app only increases the badge count whenever you get a new direct message, or you get @mentioned in a conversation.

1. Click **Settings**.
2. Click **Message**.
3. Click the **New message badge count** dropdown menu and select your preferred setting.
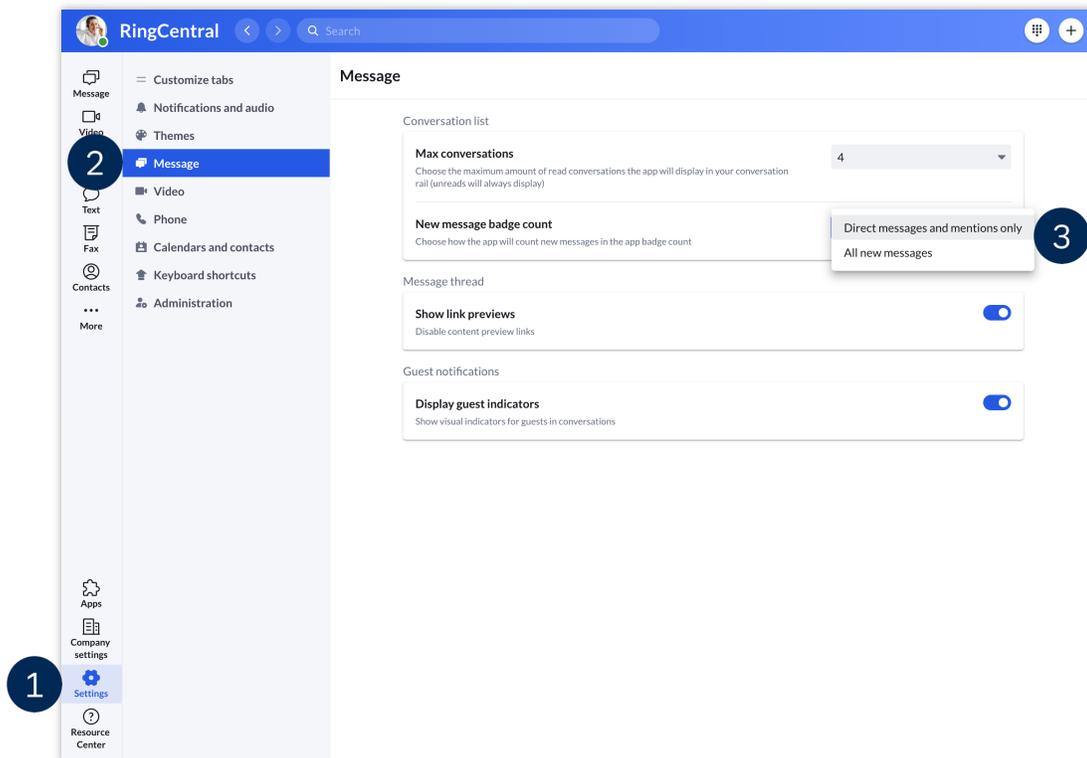
Configure Your Caller ID

Set your preferred Caller ID, so your RingCentral app displays the appropriate phone number when making calls.

1. Click **Settings**.
2. Click **Phone**.
3. Click the **Caller ID** drop-down menu.
4. Select your preferred Caller ID.
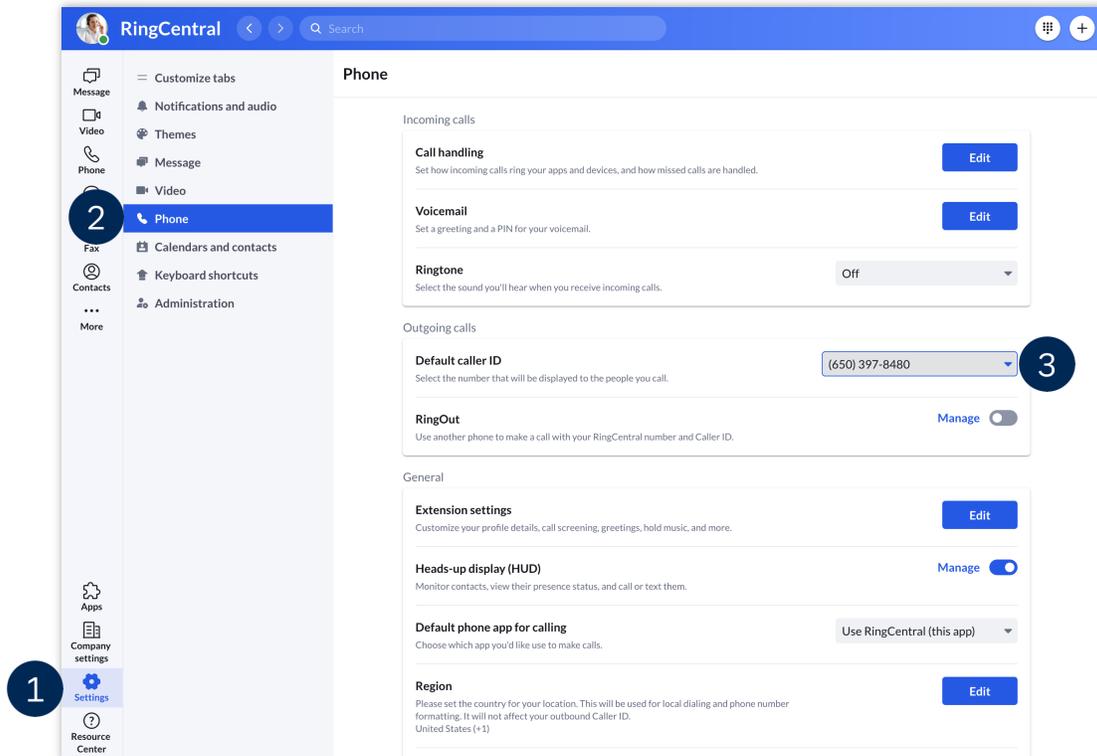
Update Your Emergency Address

Update your Emergency address to ensure that your correct location displays for calls to emergency services, using the RingCentral app.

1. Click **Settings**.
2. Click **Phone**.
3. In the Emergency response location section, click **Manage**.
4. If you are selecting from an existing emergency location:
   a. Click the dropdown to select from the available Company or Personal emergency response locations.

   If you are adding a new location:
   b. Click the **+** icon to add a new emergency response location.
5. Click **Confirm location**.
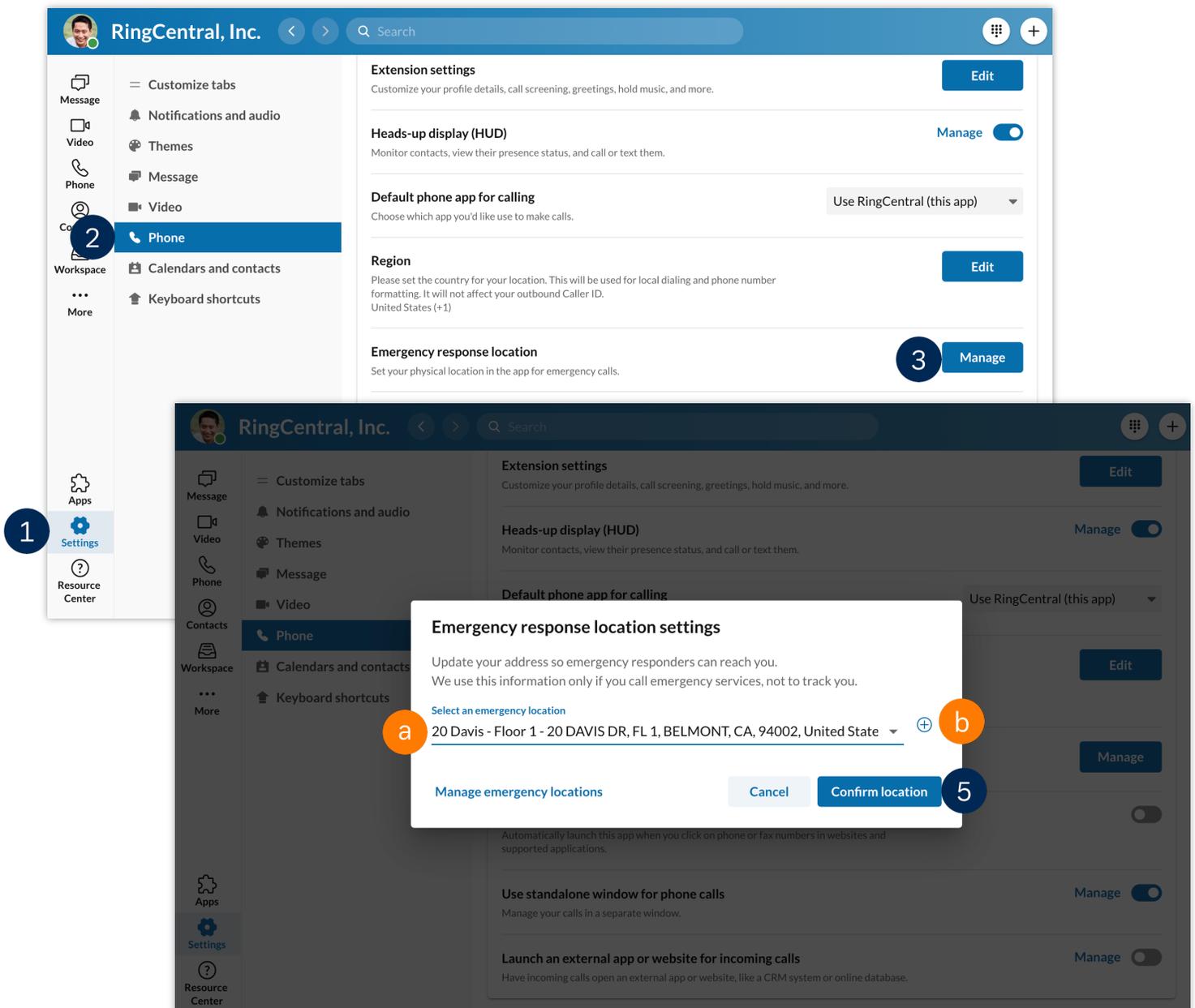
RingCentral App: Accessing Your Extension Settings

You can easily access your RingCentral extension's settings through the RingCentral app. This lets you conveniently change your extension's user details, call handling, and greetings without having to re-enter your login credentials in the RingCentral online account.

1. Click **Settings**.
2. Select **Phone**.
3. In the Extension settings section, click **Edit**.

A browser window displays with your extension settings section pulled up. Now you can proceed with making the necessary configuration changes for your extension.
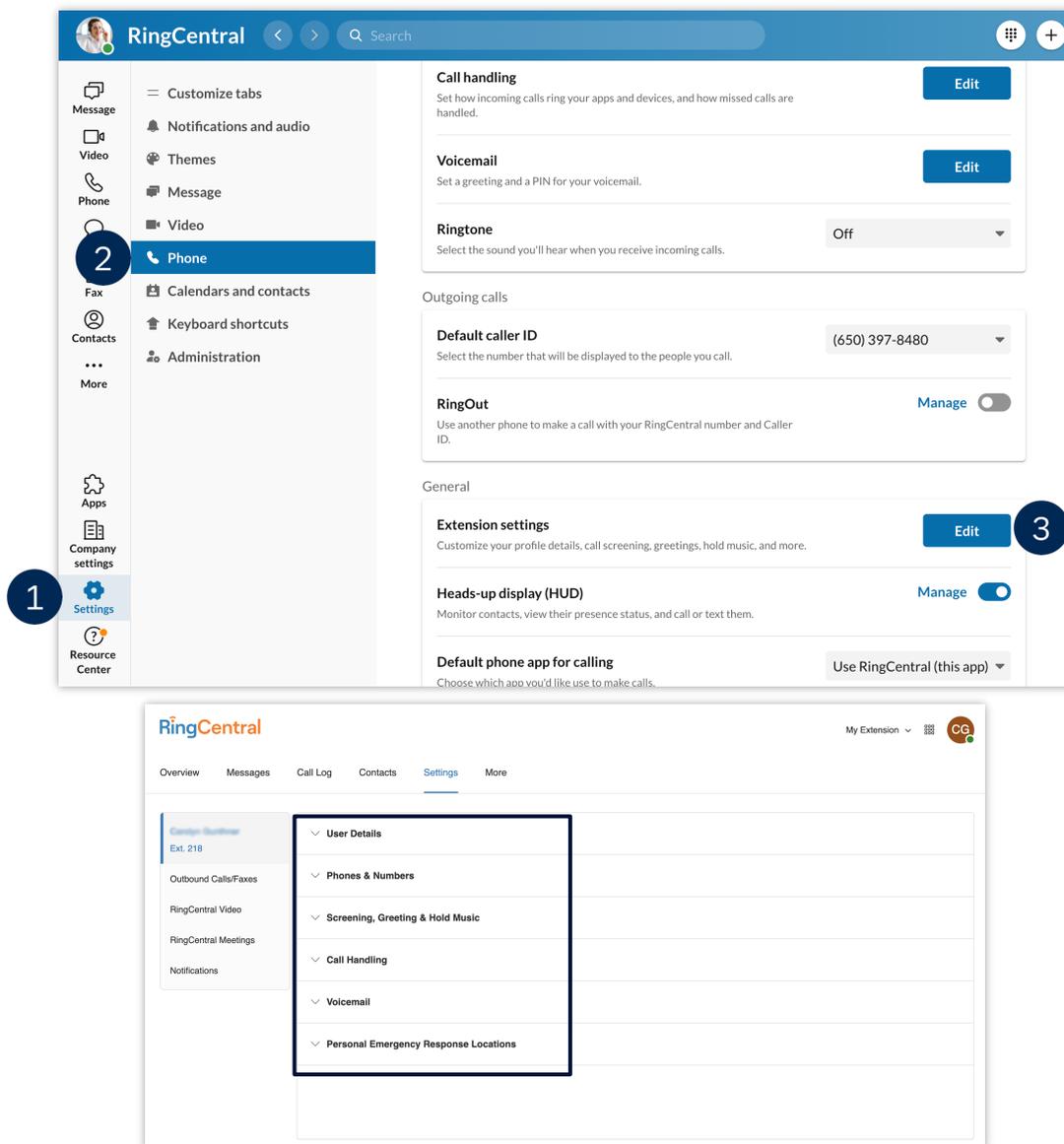
# RingCentral App: Resetting Your Password

Resetting your password through the RingCentral app is quick and straightforward. This quick guide details the steps on how to complete this process.

1. Upon launching the RingCentral app, click **Sign in**.
2. Type your RingCentral phone number or registered email address.
3. Click **Next**.
4. Click **Forgot Password**.
5. Type the account's main phone number or your extension's direct phone / fax number.
   Note: You can also enter your extension number as an optional step.
6. Click **Reset.**
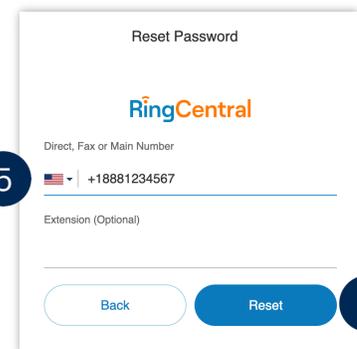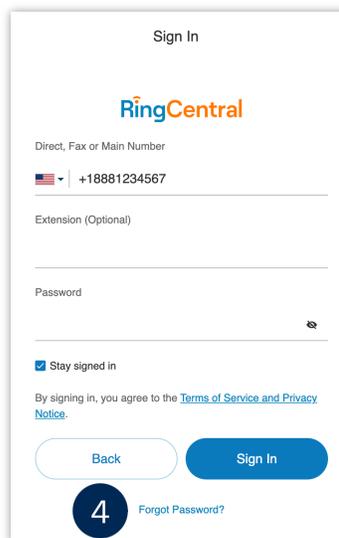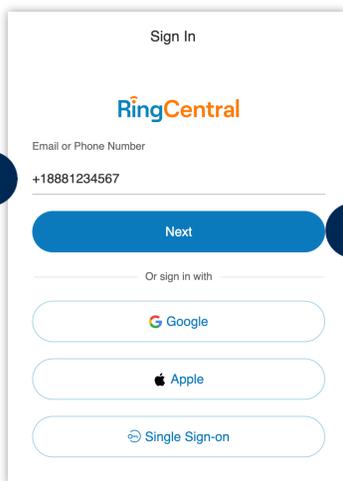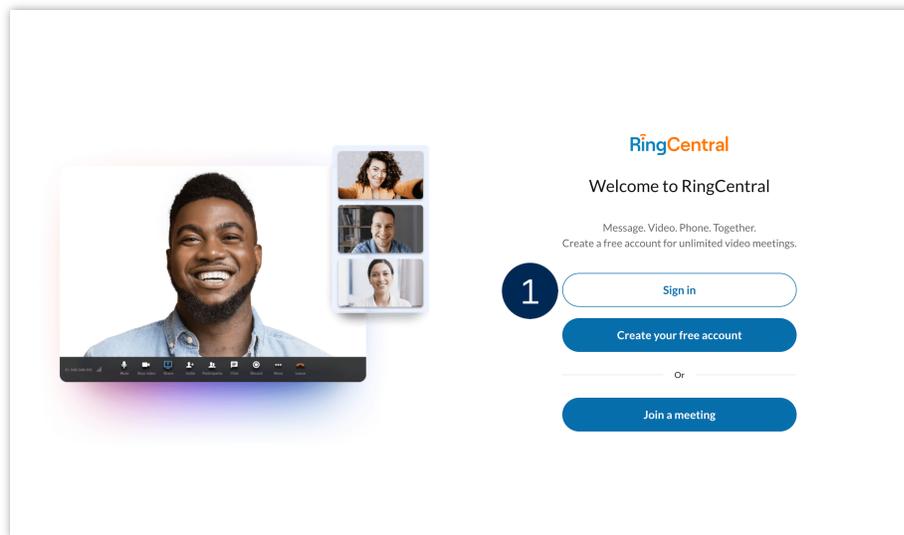
7. Open the email sent to your extension's registered email address and click **Reset Your Password**.
   Note: If the email does not appear, look in your spam folder.
8. Type your preferred new password.
9. Confirm your new password by reentering it.
10. Click **Save** to finish.

Your password has successfully been reset; you can now use it to log in to the RingCentral app.

RingCentral

Dear Rina Brown,

Looks like you want to reset your password. Let's get you updated.

7   **Reset Your Password**

If you didn't request a password reset, call us at **(888) 898-4591**.

If you're having trouble with the link above, paste this link into your browser instead:
https://login.ringcentral.com/api/recovery?code=dEwTlwh78RN3T3NtdGa7YMCZH8N6DEVfh1c8SqJtS
wJQ0h5Itenru8maPg7pGGM8ylum%2BIXk6JStfocbnFdg0ANmpm6nu0ulybFIHaIcMZs%3D&session=1
668012075768.

RingCentral

Create New Password

New Password

8   ....   👁

Password Criteria
✓ At least one letter (latin characters)
✓ At least one number (0-9)
✓ One upper case letter or special character (e.g. !, @, $, #)
✓ No sequential (e.g. "1234", "7890", "Abcd")
✓ No repeating (e.g. "222", "Aaa", "###")
✓ No account information (e.g. first/last name, phone number)
✓ Length 8-32 characters

Reenter New Password

9   👁

Save   10

Message

RingCentral App:
Sending Team Messages

The RingCentral app allows you to send direct, group, and team messages to anyone you work with, both within and outside your organization. To start using this feature, follow the steps below:

Replying to Active Conversations

1. Select the **Message** tab. Your active RingCentral conversations are listed on the left.
2. Select your preferred conversation.
3. Type your message.
4. Press Enter/Return to send the message.
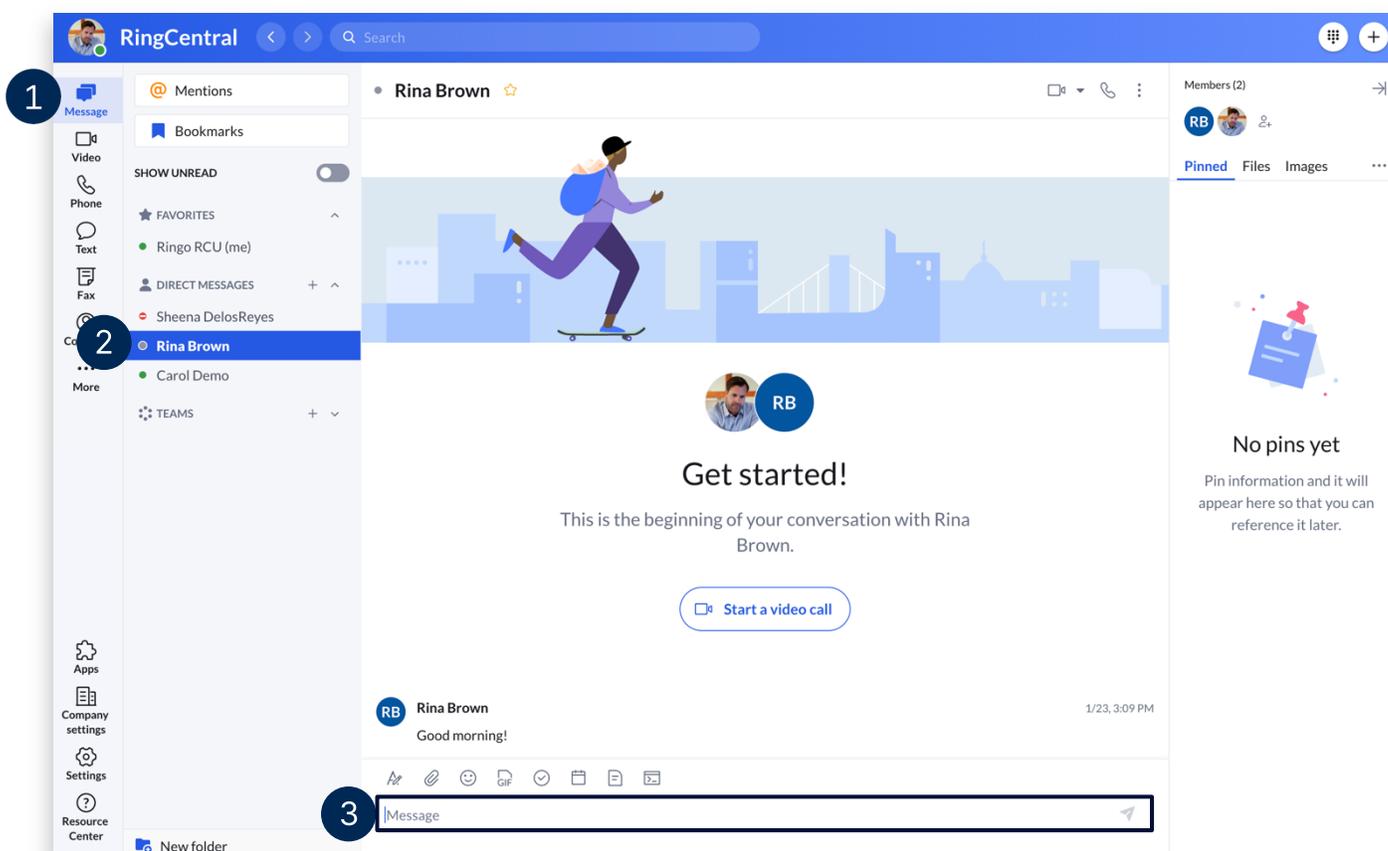
Sending a Team Message

If you want to send a new message to one person or a group of people, there are several methods you can use.

- Send a new message via the **Send new message** button
- Send a message via the **New actions** button
- Send a message by searching and selecting contacts using the **Search bar**

One way you can send a text message is via the **Send new message** button found in the **Message** menu. To send a new message using this method, follow these steps:

1. Click **Send new message**.
2. Type the name(s) in the **Members** field and separate each contact with a comma or semicolon.
   Note: For external contacts, type their e-mail addresses.
3. Once the individual, group, or team appears, select it.
4. Type a message in **Type new message**.
5. Click **Send**.
   Note: Once you send a new message, that message appears in the conversation thread.

**RingCentral App |** Sending Team Messages

The second method of sending a text message is via the **New Actions** button. To do this, follow these steps:
1. Click the **New actions** button at the top right.
2. Select **Send new message** from the drop-down menu.
3. Repeat the same steps detailed above to complete this process.
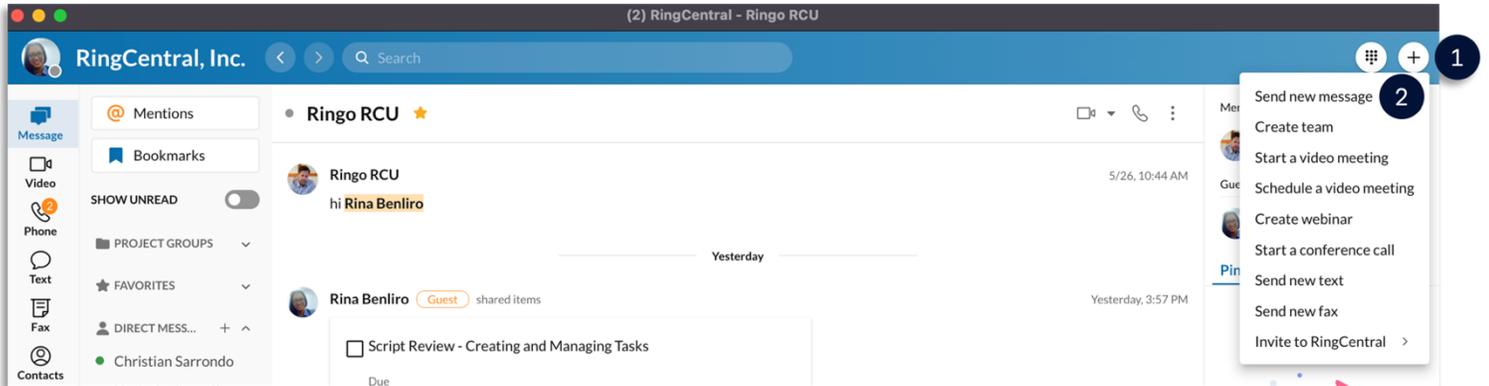
The easiest method of sending a message to existing contacts is by using the **Search bar**. Follow these steps:

1. Click into the search bar at the top of your screen.
2. Begin typing the name of the person, group, or team to begin populating a list of options.
3. Once the name of the person, group, or team appears, click the name to open in the app.
4. Type your message.
5. Press Enter/Return to send the message.
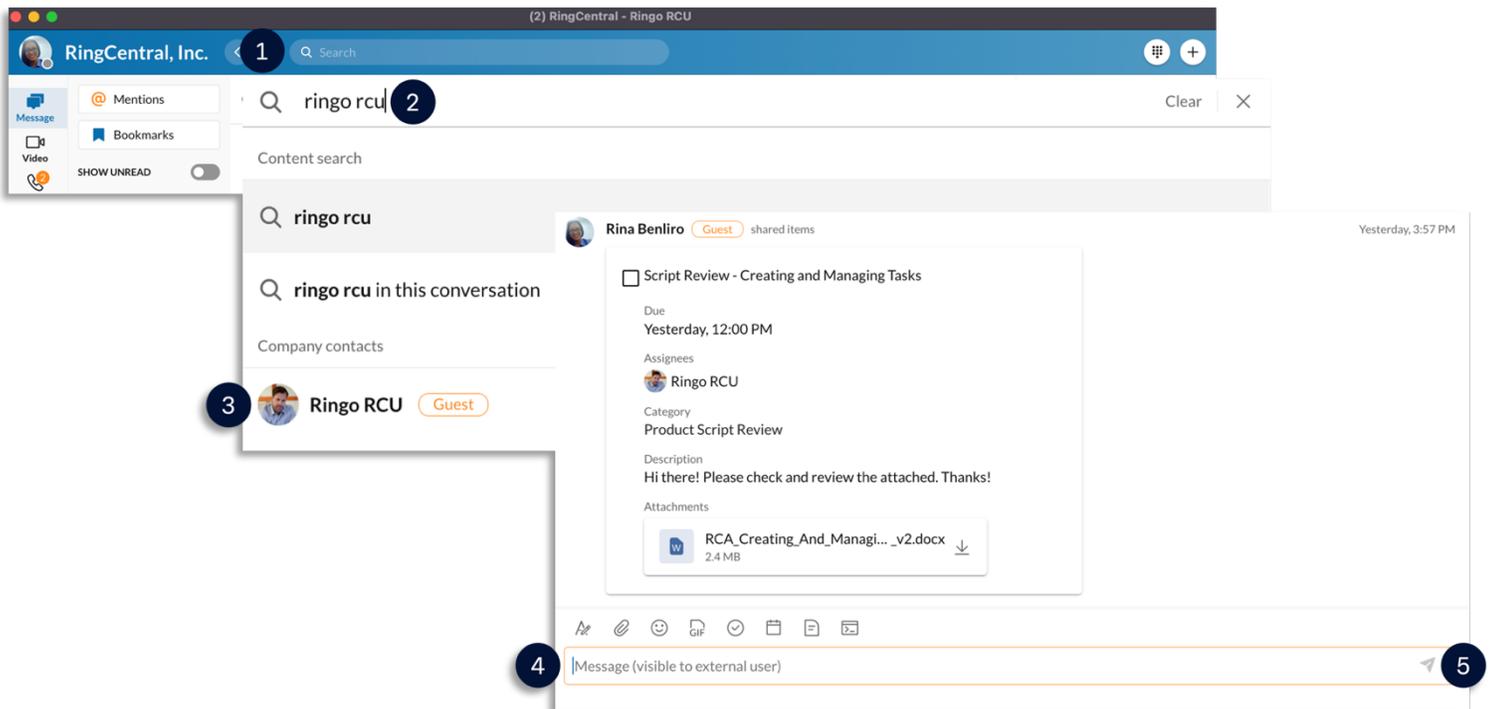
RingCentral App: Creating Teams

Team conversations in the RingCentral app is used to enhance your collaboration experience within your organization by exchanging messages, files, notes, software code, and even track tasks and events.

Teams can be created by any RingCentral app user. The person creating a team automatically becomes that team's administrator.

There are several methods for creating a team:
- Clicking the **Create team** button
- Clicking on the **New actions** button
- Converting a group conversation to a team conversation

Creating a Team

To create a team using the **Create team** button:
1. Select the **Message** icon.
2. Under **TEAMS** section, click **Create team**.
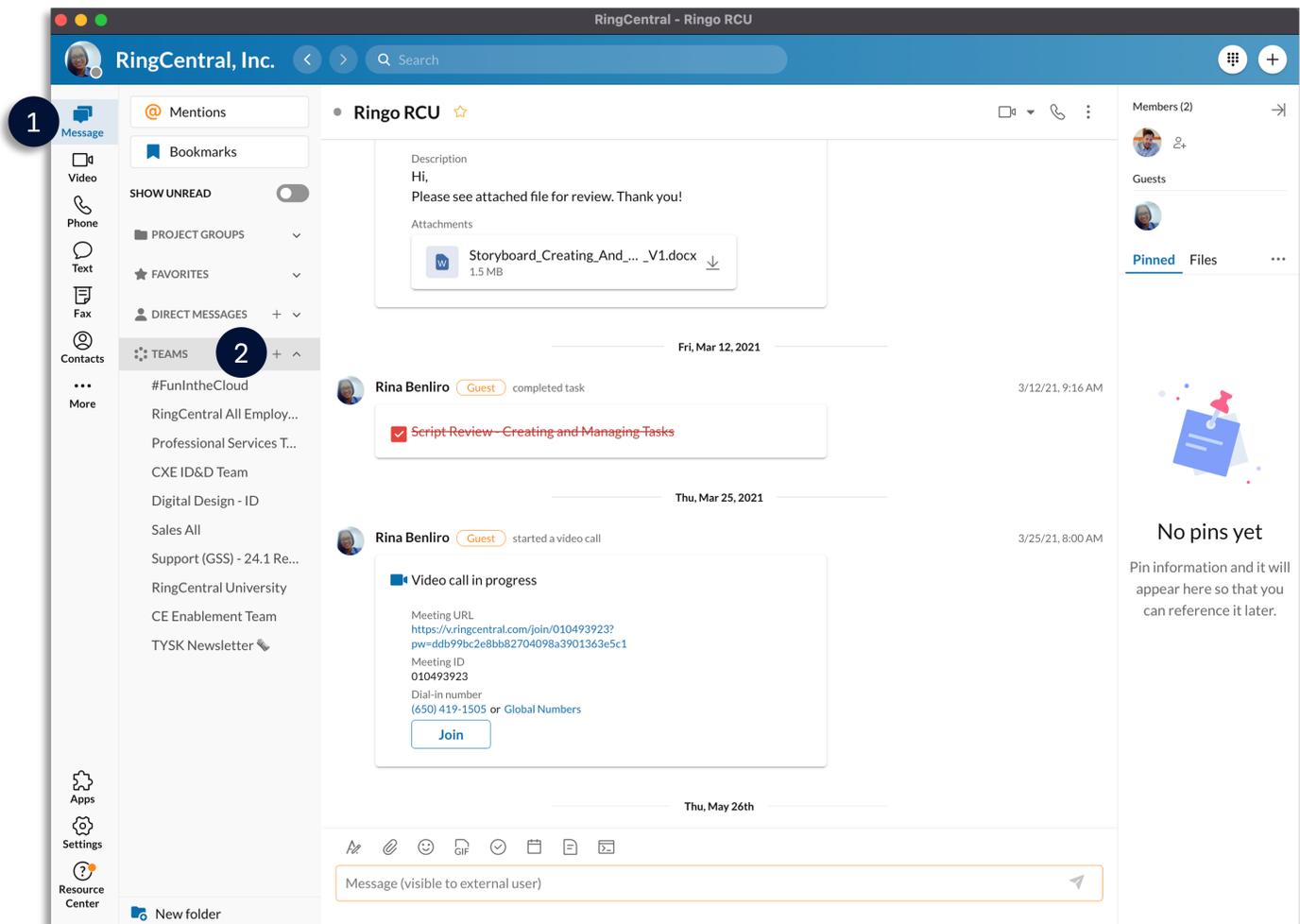
3. Complete the necessary details and configure the following settings for your team:
   - **Team name**: Enter the name of your team in this field.
   - **Members**: Enter the names of contacts to add to this team.
   - **Team description**: Enter a description for your team.
   - **Type of team**: Click the dropdown menu and choose from the following options:
     a. **Private**: Choose this option for a team to be private. Users will need to be invited to this team in order for them to join. Non-members of this team will not be able to search for it in the RingCentral app.
     b. **Public**: Choose this option if you want the team to be public, which means anyone within your organization can search for it in the RingCentral app and join without being invited.
   - **Allow members to add other members**: Enable this to allow non-admin members of the team to invite members. This setting is only applicable for private teams.
   - **Allow members to post Messages**: Disable this setting to make this team read-only, meaning any non-admins will be unable to post in this team.
   - **Allow members to @team mention**: Enable this setting to allow non-admins to use the @team conversation.
   - **Allow members to pin post**: Toggle this setting on to allow non-admins to pin posts in the conversation.
4. Click **Create**.

5. The new team appears at the top of the **TEAMS** section in the left pane. Select it to go to the team's conversation thread and start collaborating.
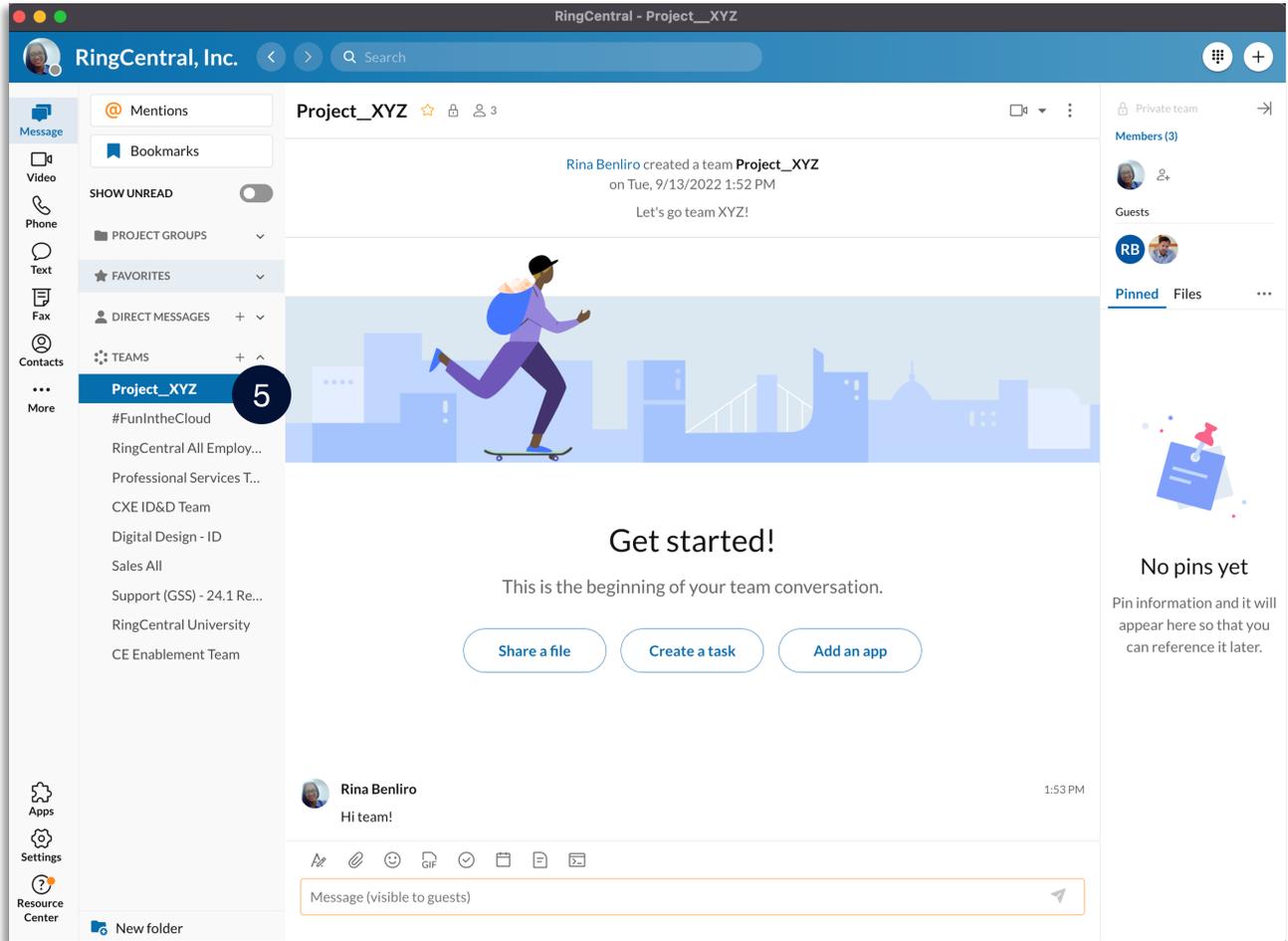
Another alternative method in creating a team is via the **New Actions** button. To use this, follow these steps:

1. Click **New Actions** beside your Profile photo.
2. Select **Create team** from the drop-down menu.
   Note: Repeat the same steps detailed in "Creating a Team" to complete this process.
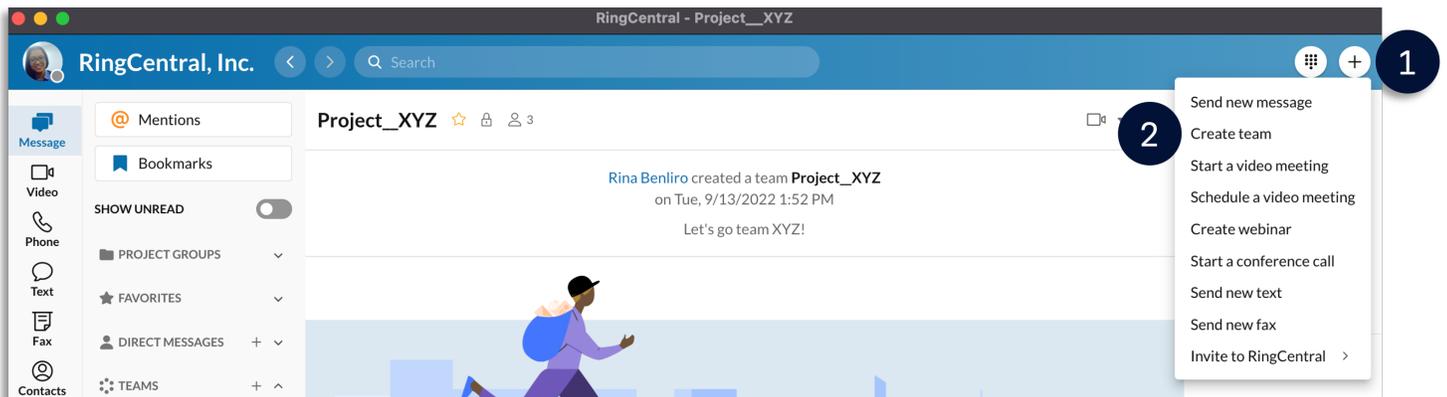
Converting a Group Conversation into a Team

To convert a group conversation into a team, follow these steps:

1. Click **Message**.
2. Under **DIRECT MESSAGES**, select a group conversation.
3. Click **More**.
4. Select **Convert to team**.
5. Enter your preferred Team name.
6. Click **Convert to team**.
7. Once you've converted a group to a team, that team will appear under the **TEAMS** section in the conversation list.
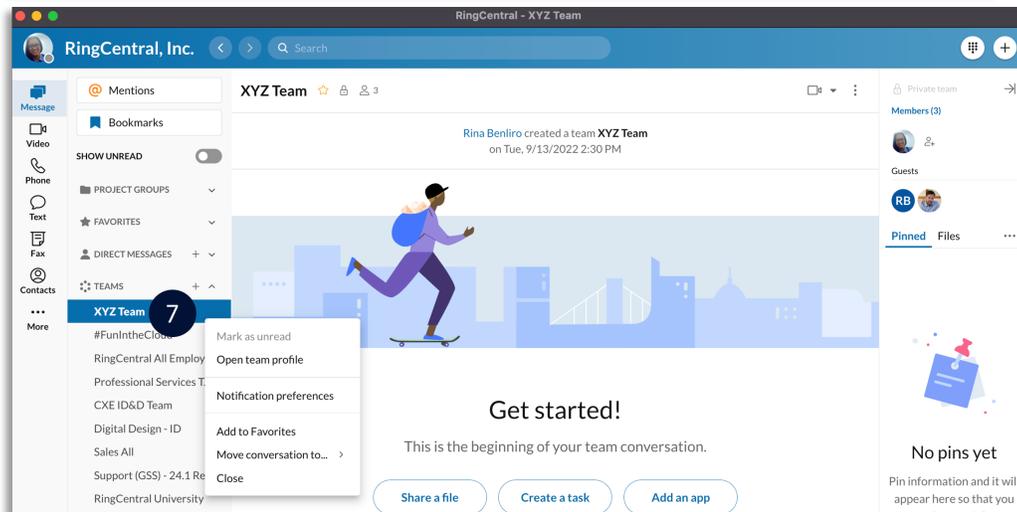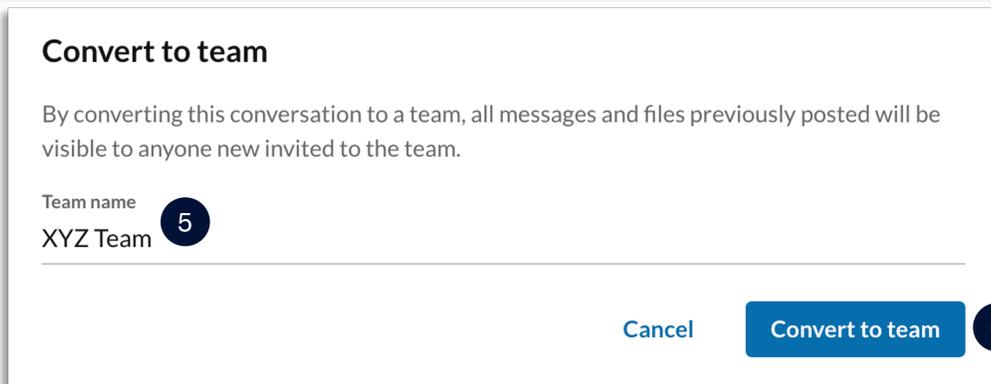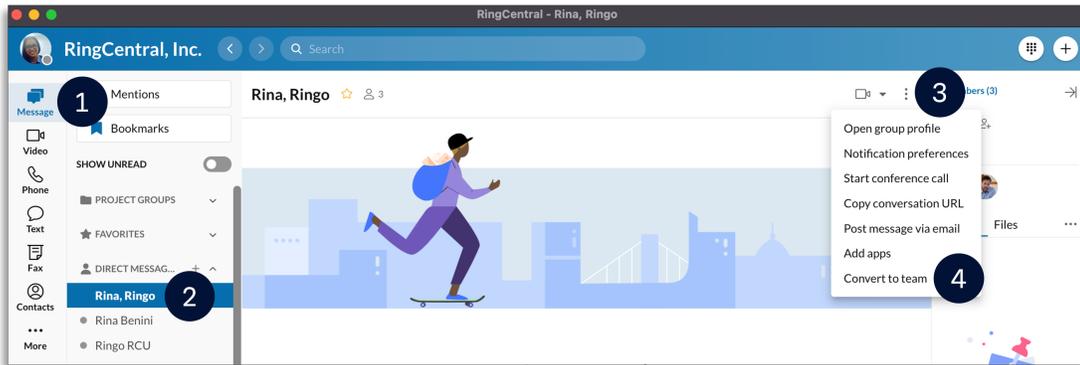
RingCentral App: Searching and Bookmarking Messages

The RingCentral app allows you to search through all your conversations to find specific messages, events, files, links, notes, tasks, or code snippets. You can also bookmark them for easier access in the future.

Using the Search Tool

Scrolling back and reading several posts or messages can take a lot of time. The RingCentral app's search feature helps you quickly find what you need. Here's how to use this feature:

1. Within the conversation page, type a keyword in the **Search** field.
2. Your search results are separated into the following categories:
   - Content or specific messages
   - Company contacts
   - Groups & Teams
   - Text Conversations
   - Settings
3. Click the **Show more** text to view the full list of search results for a specific category.

4. Scroll through the list of your search results until you find the one you need.
5. Hover your mouse over your preferred result and click **View in conversation** to see the full message in the conversation thread.
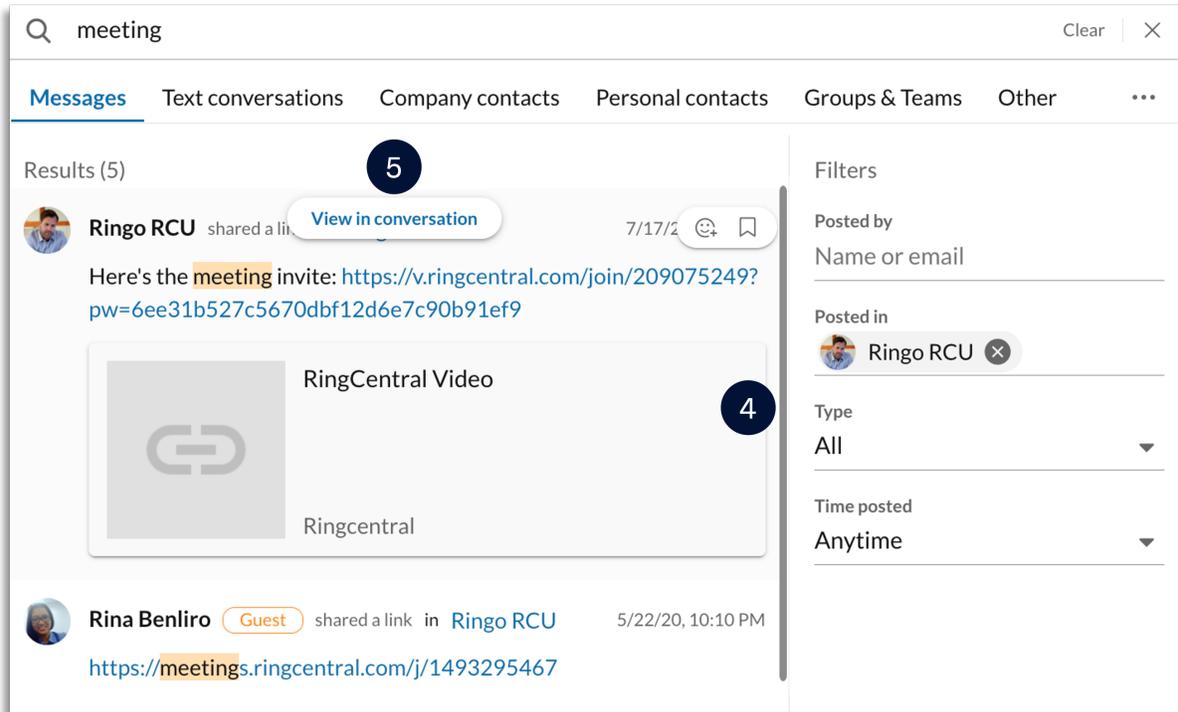
Optional: You can use the Filters section in the RingCentral app to narrow your selection results. Use the following steps below:

i. Go to the **Filters** section to narrow your selection.
ii. Edit the **Type** and the **Time posted** to narrow the search results.
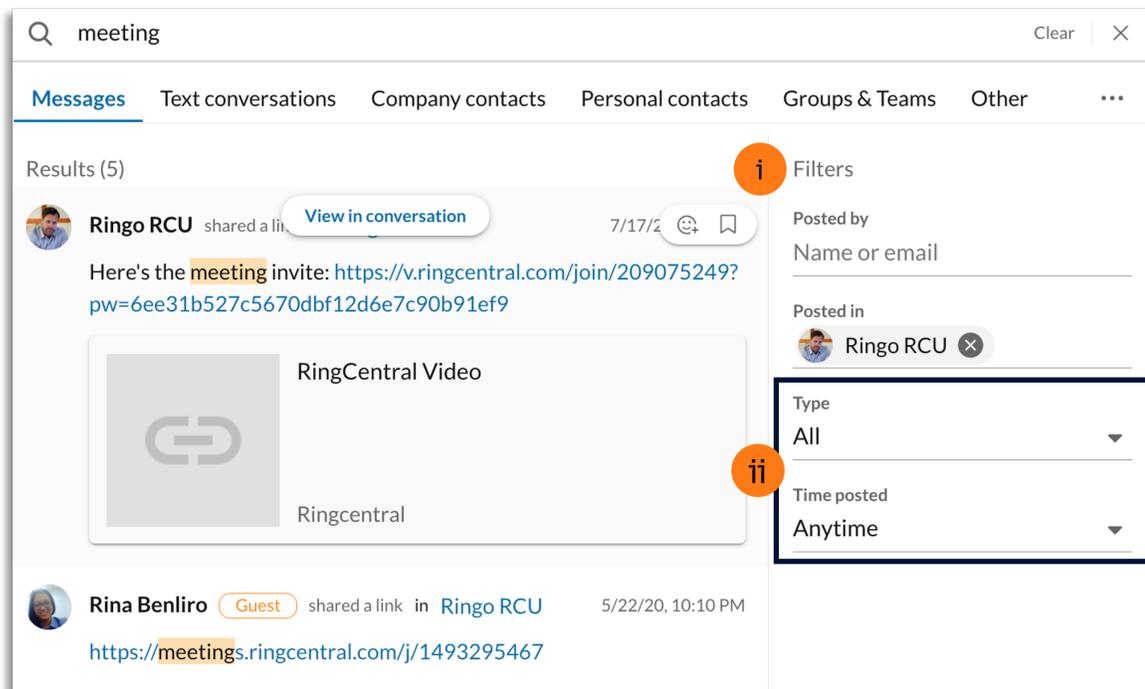
Bookmarking Messages

The RingCentral app's bookmark feature allows you to easily access saved messages, events, or posts. To bookmark a message from any existing conversation, follow these steps:

1. Within the Message section, select your preferred conversation.
2. Hover your mouse over the message, then click **More**.
3. Click **Bookmark**.
4. Go to **Bookmarks** on the left-pane to view all bookmarked posts.
   Note: You can hover your mouse over a message and click **Remove bookmark** to remove it from the Bookmarks section.
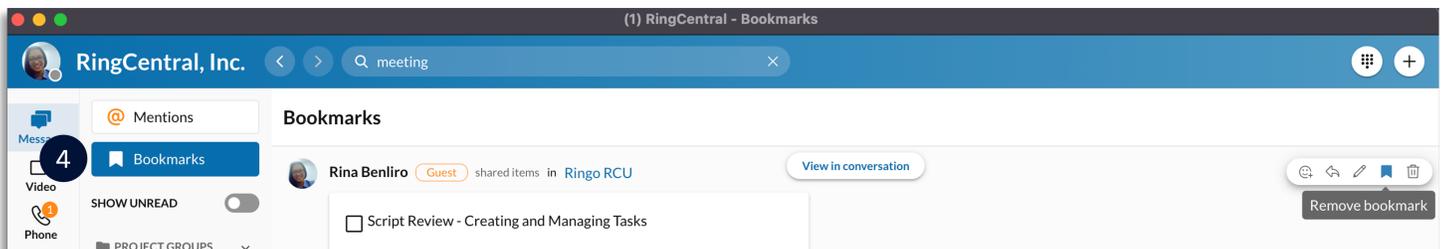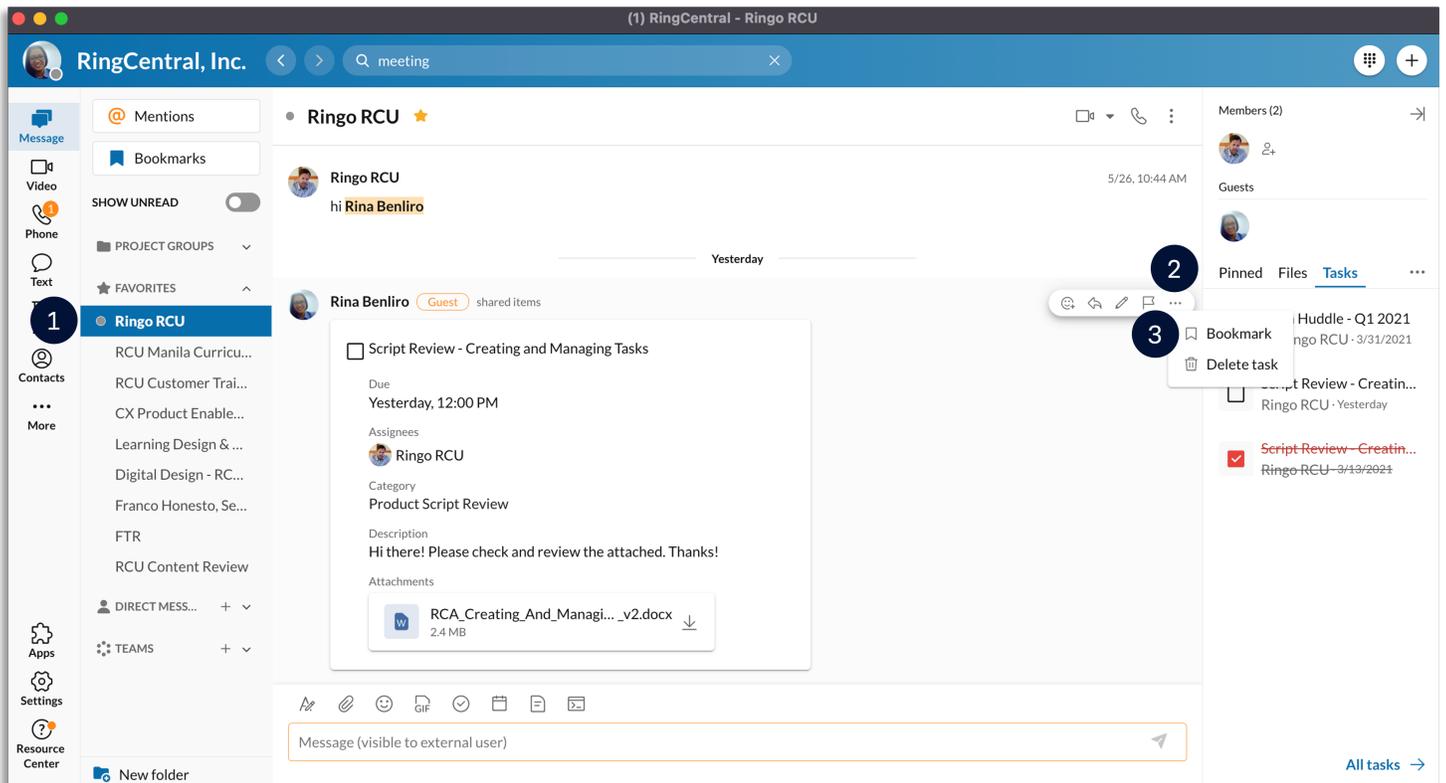
RingCentral App for Desktop: Enhanced Messaging - Using the Messaging Toolbar

Within an individual, group, or team conversation, you have several options to enhance your messaging experience. This quick guide covers the built-in features within RingCentral app conversations.

Change the Format of Your Message

Use the text format toolbar to change the font size, font color, text alignment, lists, and the like.

1. Click Format message.
2. Use the following options to format your message:
   A. Bold
   B. Underline
   C. Italic
   D. Strikethrough
   E. Numbered list
   F. Bulleted list
   G. Increase indent
   H. Decrease indent
   I. Insert link
   J. Insert horizontal line
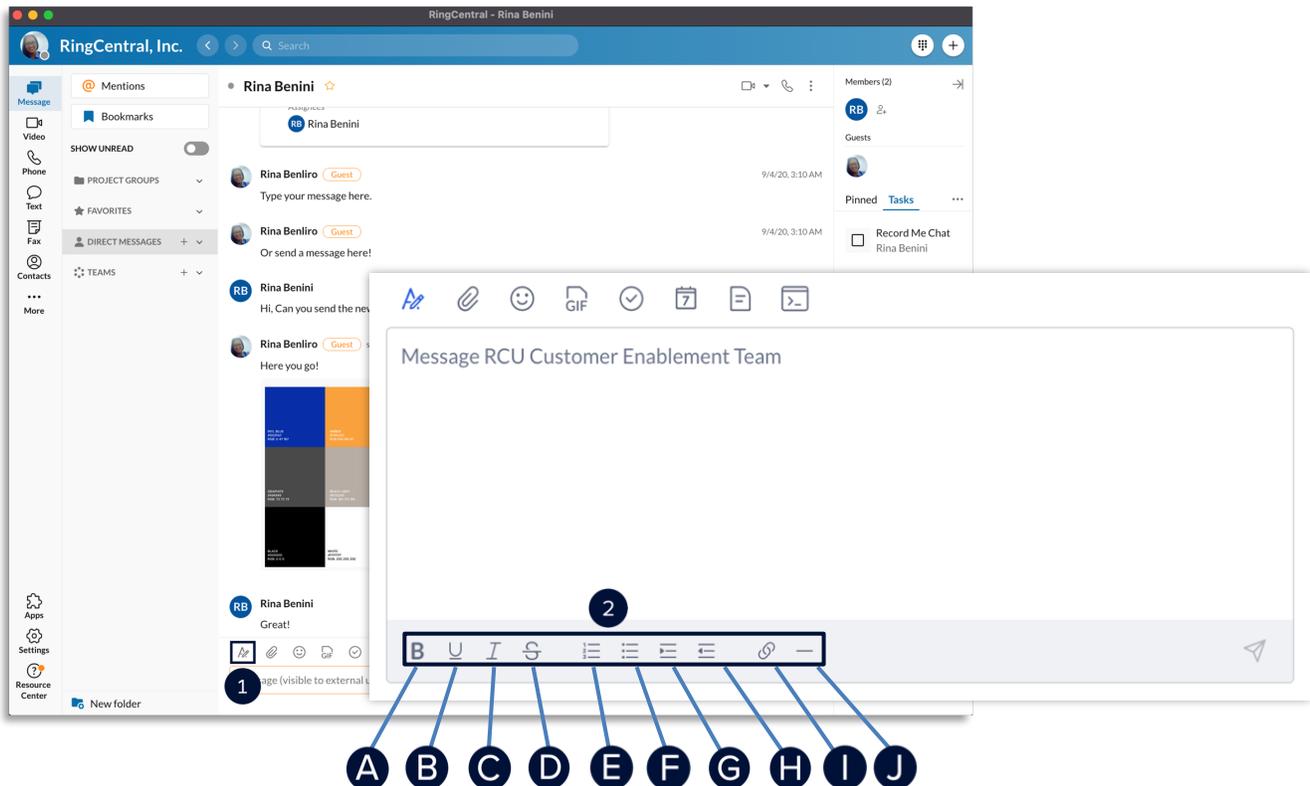
Attach a File to a Message

Different files can be attached to a message – typically used as a simple way to share documents, video files, and images.

1. Click **Attach file**.
2. Click **Computer** to upload files from your computer or choose from **Google Drive, OneDrive/Sharepoint, Box, or Dropbox** to upload files from cloud storage.
Note: You can also drag and drop files directly into a conversation from your computer.
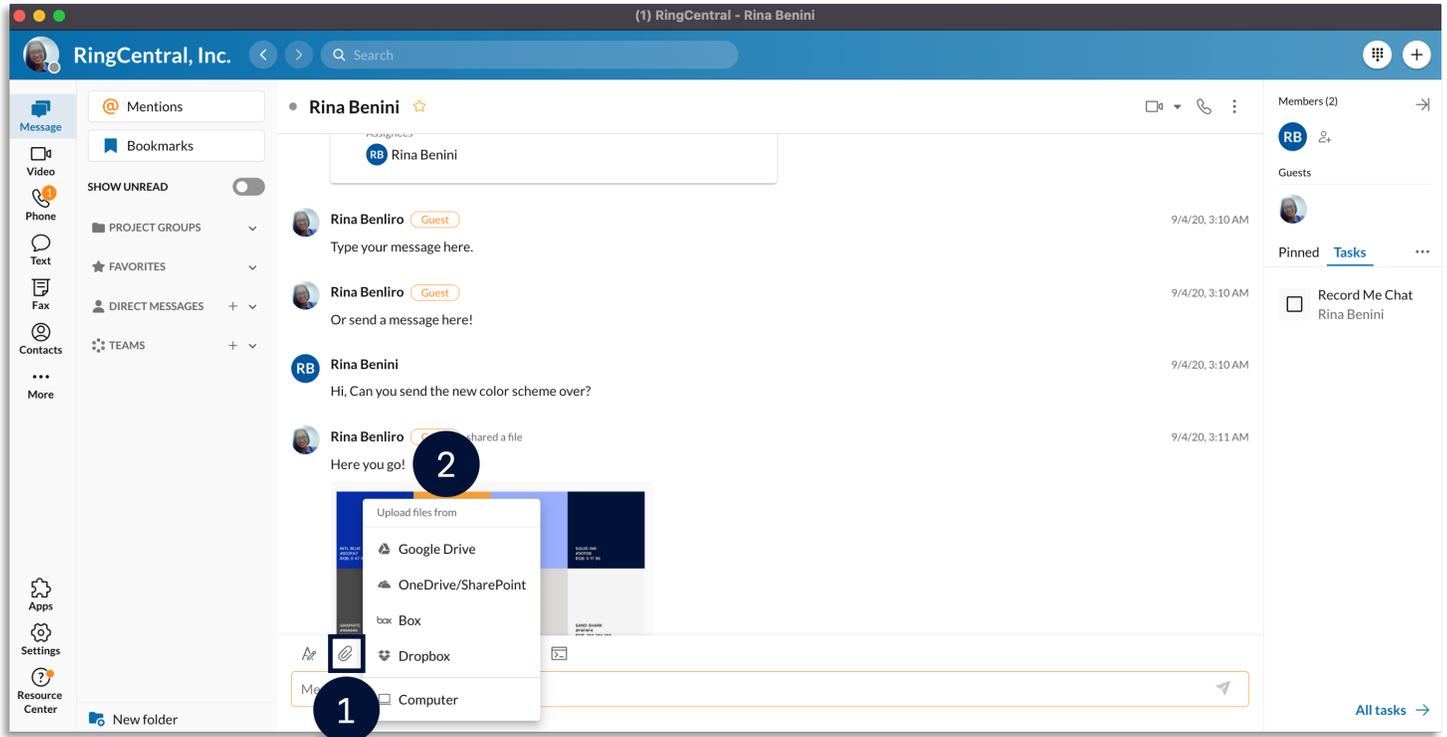
Use Emoji and GIF Options

Use emojis and GIFs in a conversation. These features allow you to react to messages and add character.

To add an emoji:

1. Click **Emoji**.
2. Select your preferred emoji.
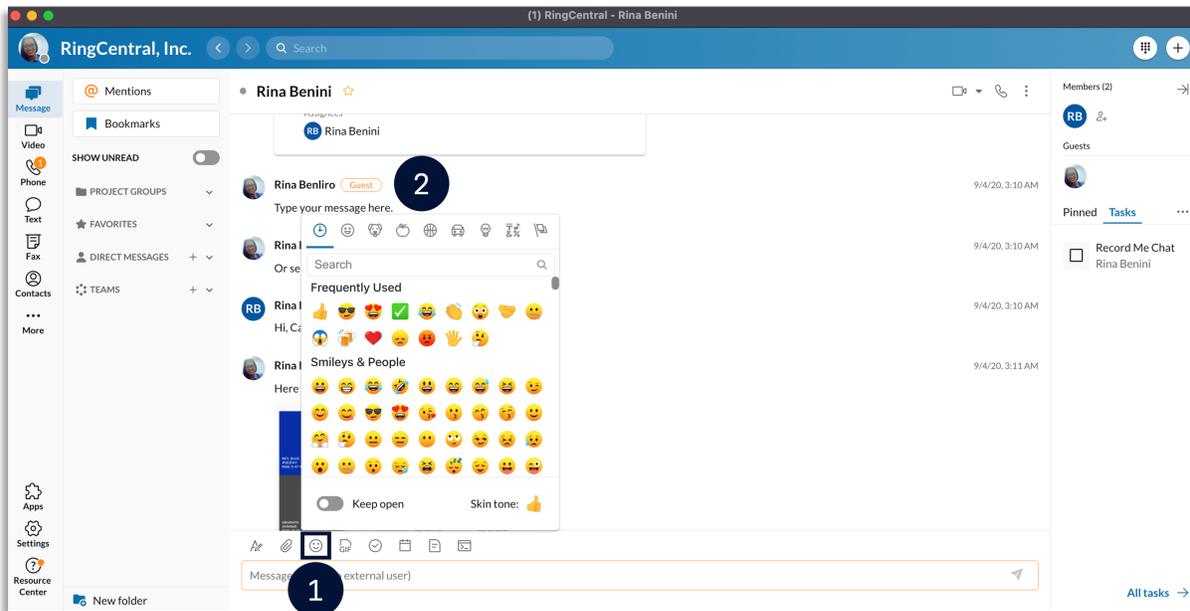
To add a GIF:

1. Click **Share a GIF**.
2. Search for GIFs using the search bar or select from the available GIFs in the preview window.
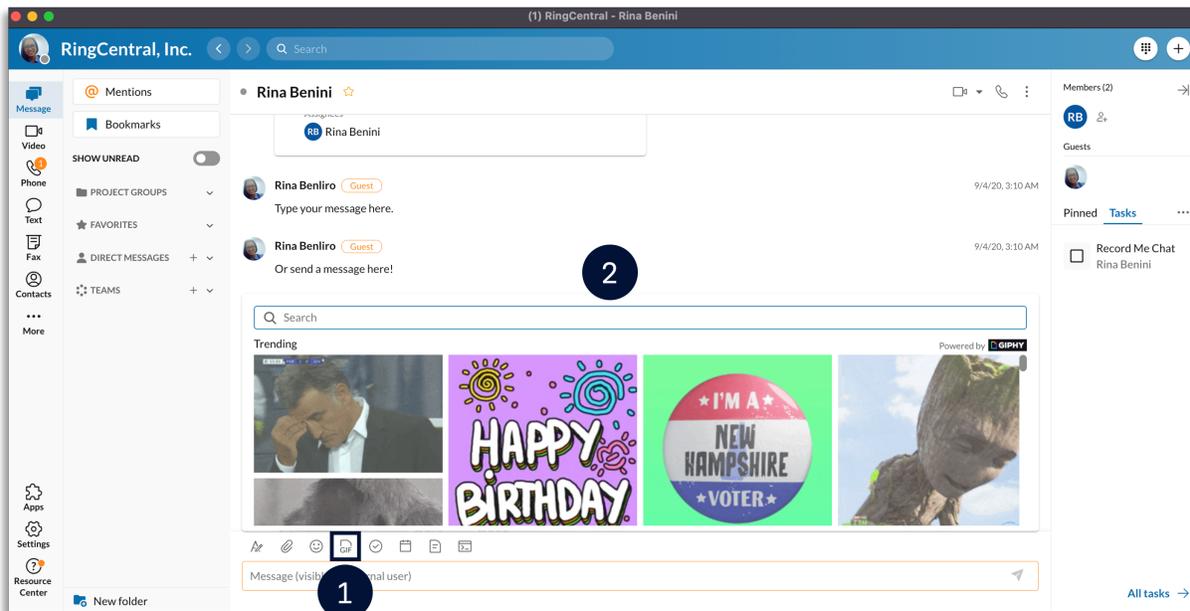
Create and Assign Tasks Within a Conversation

Create and assign tasks to collaborate with colleagues and keep track of projects.

1. Click **New task**.
2. Fill out the following fields (as appropriate):
   A. **Task title** – Enter the task name. (Required)
   B. **Category** – Enter the task category.
   C. **Assignees** – Set the task assignees.
   D. **Start Date** – Set the start date.
   E. **Due Date** – Set the due date.
   F. **Due Time** – Set the due time.
   G. **Repeat** – Set the task reoccurrence.
   H. **Complete when** – Set the completion condition.
   I. **Color tag** – Select a task color.
   J. **Enter task description** – Enter the task description.
   Note**:** You can also attach files, add links, and add emoji in the description.
3. Click **Post and close** to go back to the conversation window or **Post and new** to create a new task.
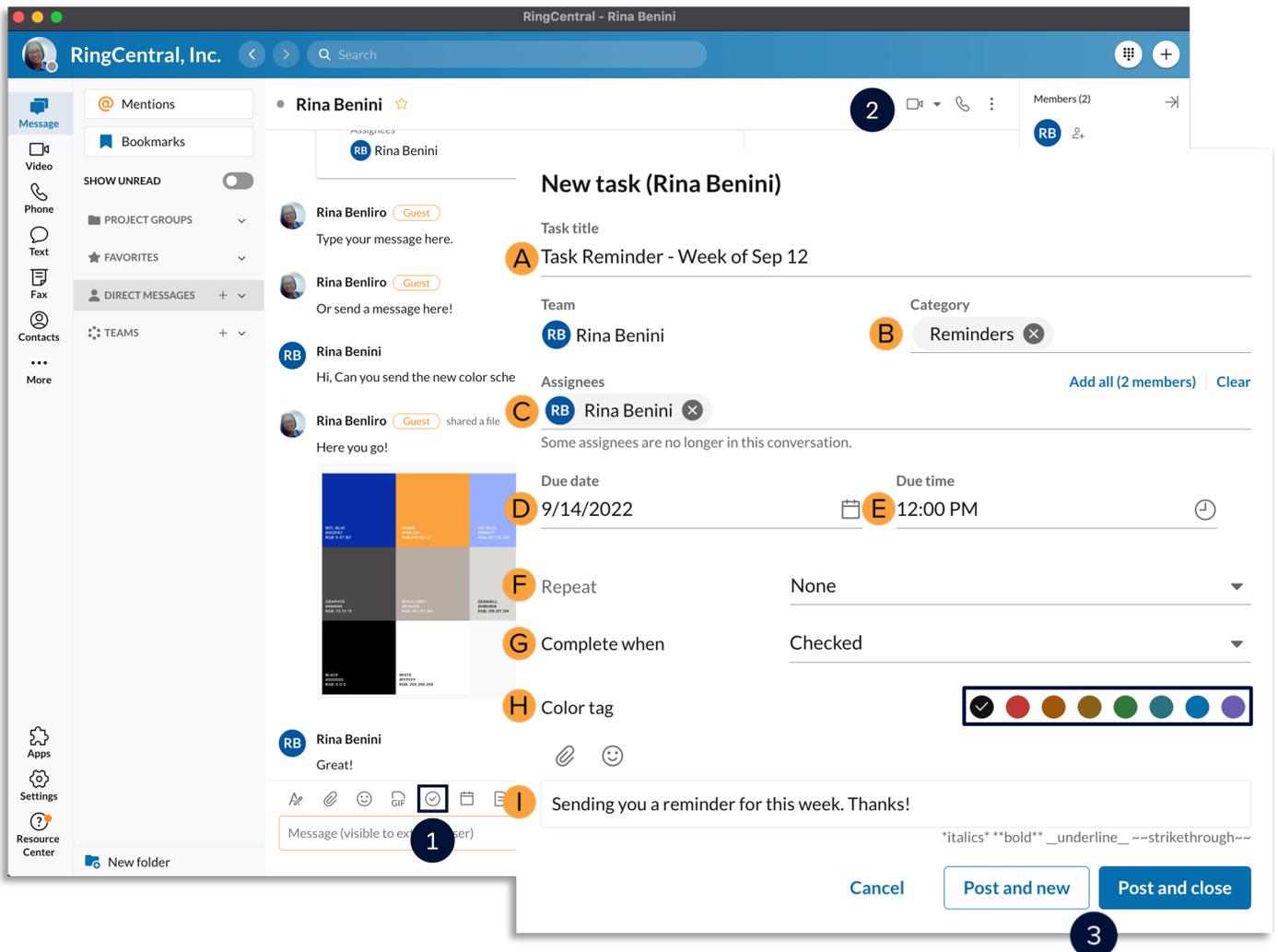
Create an Event Within a Conversation

Keep up to date with your meetings and schedule by adding entries to the RingCentral app calendar by creating events.

1. Click **New Event**.
2. Fill out the following fields:
   A. **Event title** – Enter the task name.
   B. **Start date** – Set the start date.
   C. **End date** – Set the end date.
   D. **Start time** – Set the start time.
   E. **End time** – Set the end time.
   F. **Repeat** – Set the event reoccurrence.
   G. **Location** – Set the event location.
   H. **Color tag** – Select an event color.
   I. **Enter event description** – Enter the event description.
3. Click **Create**.
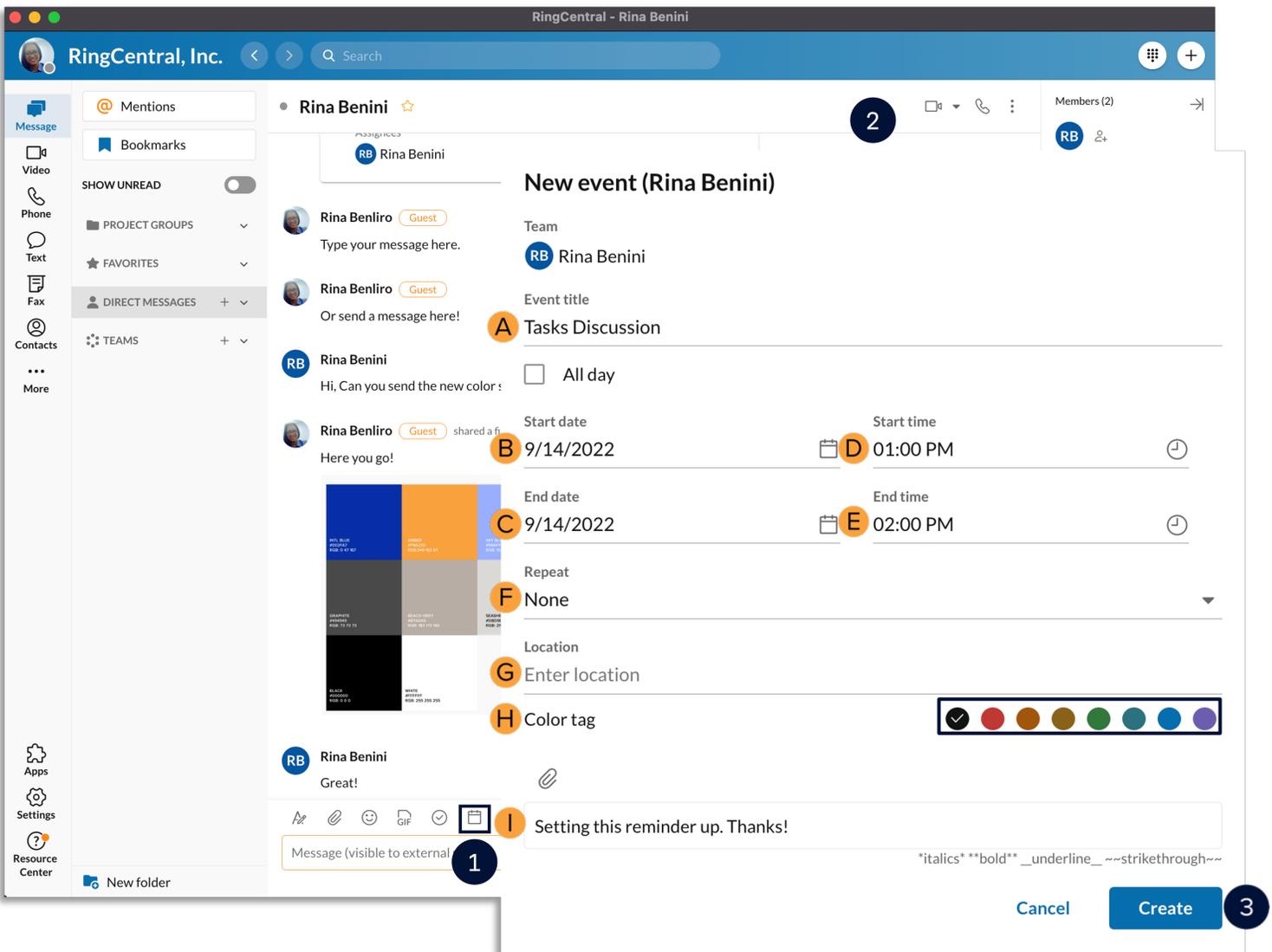
# Create a Note Within a Conversation

Use notes to draft and post relevant information that everyone in the conversation can edit.

1. Click **New note**.
2. Enter a title and draft the note.
3. Click the **Post to** icon to finish.
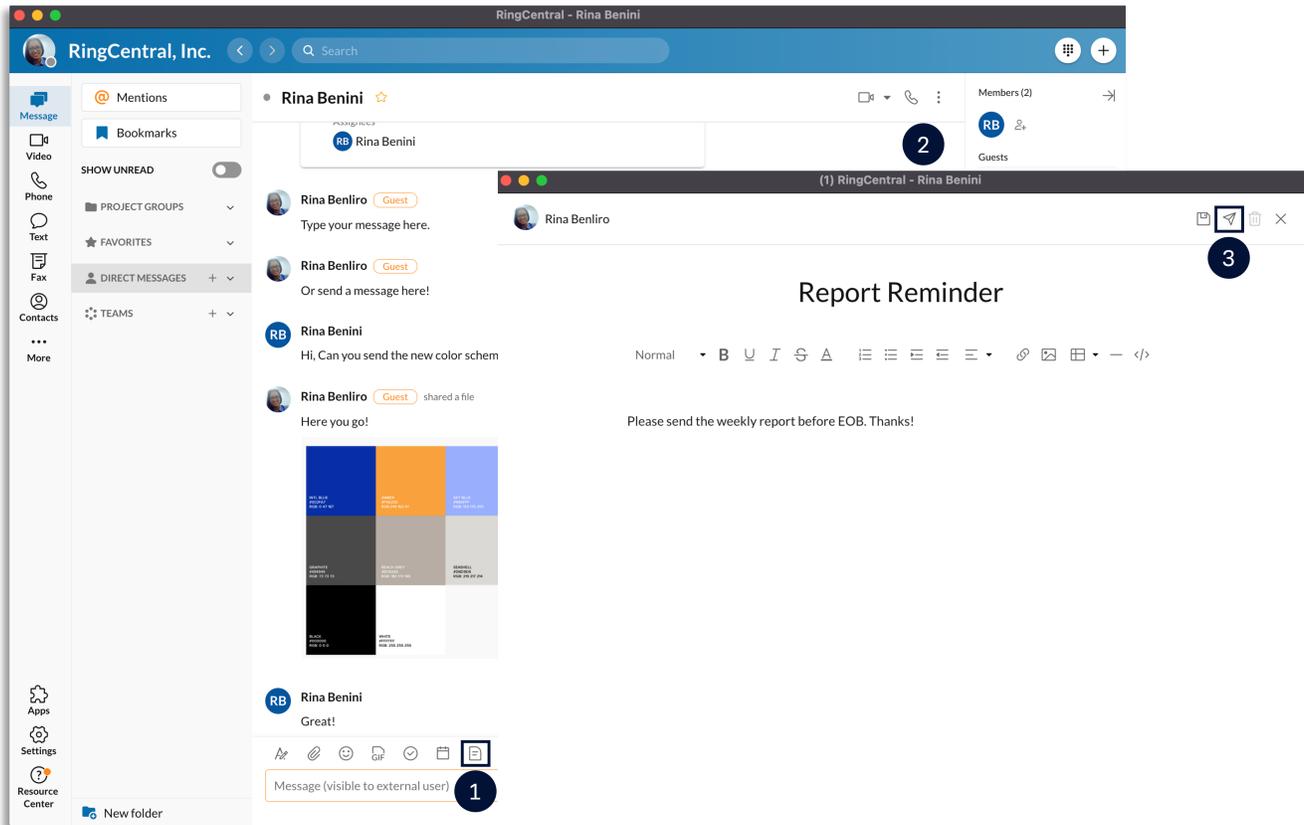
Use the @Mention Feature

Draw attention to someone to let them know they were called out. Use the @mention feature by typing **@** and their name. You can also type **@team** to notify all the members within a team conversation.
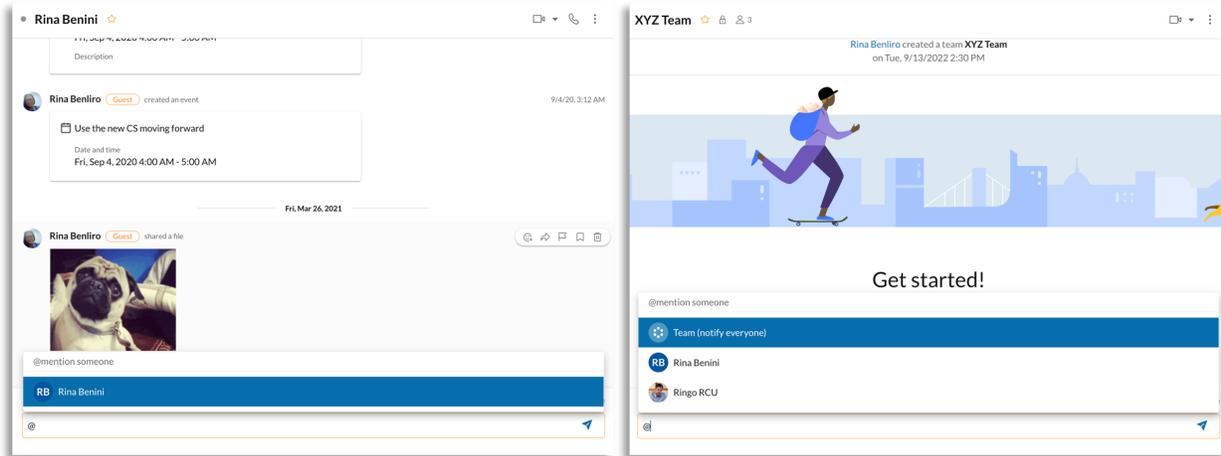
RingCentral App: Updating Conversation Preferences

Take time to update your conversation preferences in the RingCentral app, so you don't miss important calls or messages; this quick guide shows you how to do it.

Updating Conversation Preferences

1. Click **Settings**.
2. Select **Notification and audio**.
3. Click the **New messages** dropdown to choose your desktop notification for new messages.
   a. Select **All new messages** to get notified when there are direct or new messages sent to you or teams you are a member in.
   b. Select **Direct Messages and mentions** to get notified only when someone mentioned you through a direct message or the team you a member in.
   c. Select **Off** to turn off all message notifications.

4. Activate **Incoming calls** to get notified when someone calls you.
5. Turn on **Missed calls and new voicemails** to get notified when you miss a call, or someone leaves a voicemail.
6. For Mac users, click the **Bounce app icon** dropdown menu to select how often you want the icon to notify you when you have a new message, incoming call, missed call, or voicemail.
   a. For Windows users, enable the **Flash app icon** option to receive notifications.

Desktop notifications

New messages
Choose your preference for desktop notifications for new messages   Off ▼

Incoming calls   4
Receive notifications for incoming calls

Missed calls and new voicemails   5
Receive notifications for missed calls and new voicemails

                                                                                     Bounce continuously

Bounce app icon   Bounce once   6
Bounce the app icon in the dock when receiving a notification
                                                                                     Off

A
R   Flash app icon   a
         Flash the app icon when receiving a notification

Upcoming meeting reminder   When meeting starts ▼
Choose when you'd like to be notified before a meeting begins.

7. You can also customize the sound of each notification type. This helps you identify when receivingany of the following:
   a. Direct messages
   b. Mentions
   c. Team messages
   d. Incoming voice calls
   e. Incoming video calls

Sounds

Direct messages
Choose sound for new direct messages
Ching ▼ ⓐ

Mentions
Choose sound for when you are mentioned
Bing Bong ▼ ⓑ

Team messages
Choose a sound for new team messages
Snap ▼ ⓒ

Ringtone
Select the sound you'll hear when you receive incoming calls.
Ringing Bells ▼ ⓓ

Incoming video calls
Choose a sound for incoming video calls
Ring ▼ ⓔ

8. Customize how often you want to receive an email notification for direct messages.
9. Enable email notifications whenever your name is mentioned.
10. Customize how often you want to receive email notifications for team messages.

Email notifications

Every 15 minutes

Direct messages
Receive email notifications for direct messages
Every hour ⑧

Off

Mentions
Receive email notifications for when you are mentioned
⬜ ⑨

Teams
Receive email notifications for team messages
Off ▼ ⑩

RingCentral App:
Creating and Managing Tasks

This quick guide shows you 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 these 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 taskto one or more team members.
   a. You can also click **Add all** to add your name as one of the assignees.
5. Enter a due date and a due time.
6. Select the task recurrence.

Message (visible to external user) **1**

New task (Ringo RCU)

Task title **2**
Script Review - Creating and Managing Tasks

Team
Ringo RCU

Category **3**
Product Script Review ⊗

Assignees
Ringo RCU ⊗ **4**
Some assignees are no longer in this conversation.

4a Add all (2 members) | Clear

Due date **5**
9/13/2022

Due time
12:00 PM

6 Repeat

Complete when

Color tag

Enter task description

None
Every day
Every weekday
Every week
Every month
Every year

Cancel | Post and new | Post and close

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.
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.
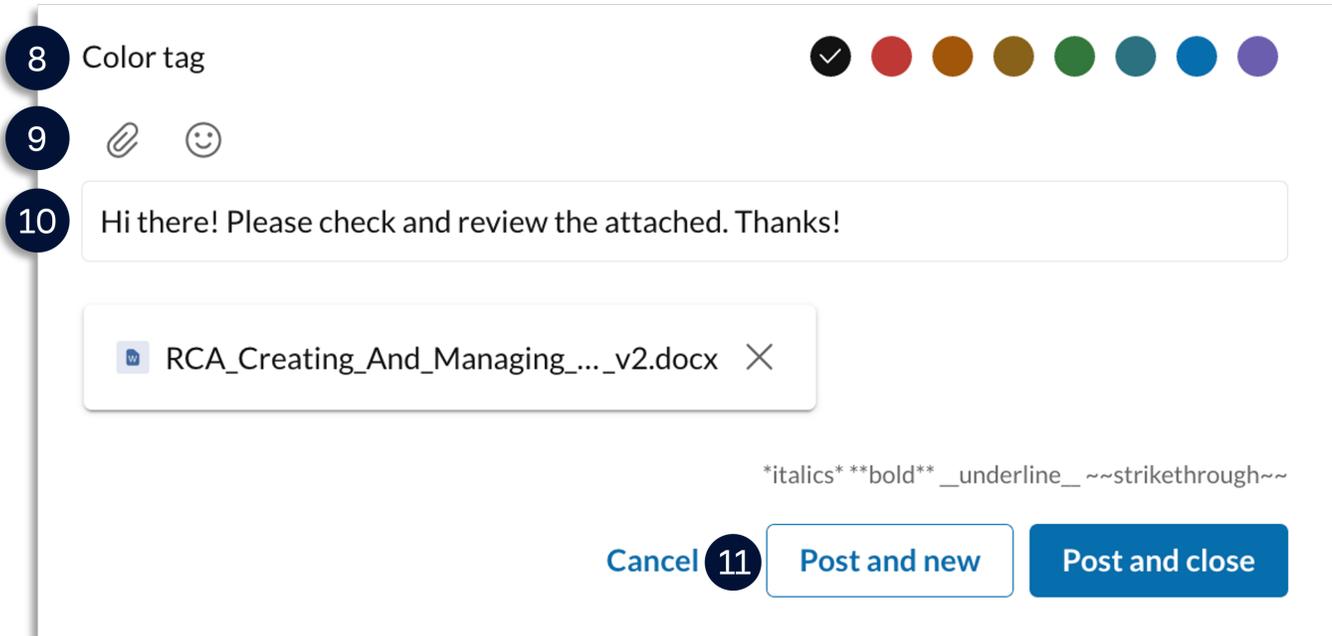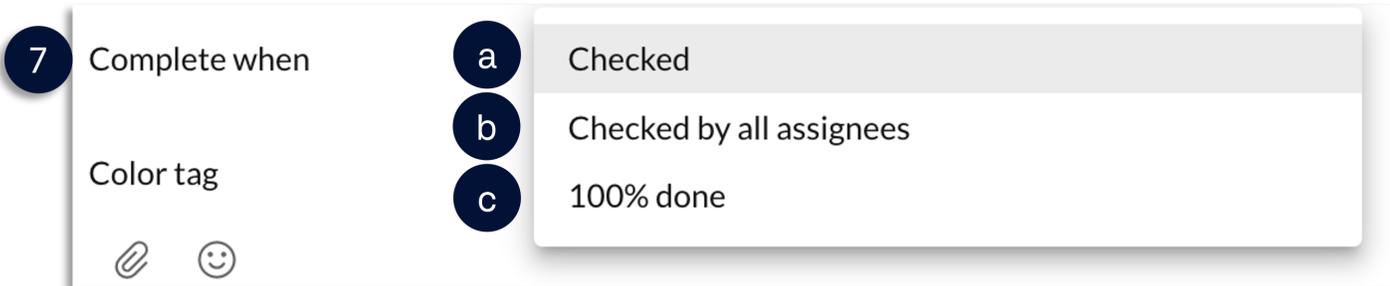
Managing a Task

Follow these steps to manage a task:

1. Users can manage tasks from the conversation pane to:
   a. React with an emoji
   b. Reply to task
   c. Edit task
   d. Mark unread from here
   e. Bookmark
   f. Delete task
2. Everything the Workspaces tab displays for all groups, teams, and individual conversations. Click the **Tasks** then click **Workspace** to show the following:
   a. Calendar
   b. Tasks
   c. Events
   d. Files
   e. Notes
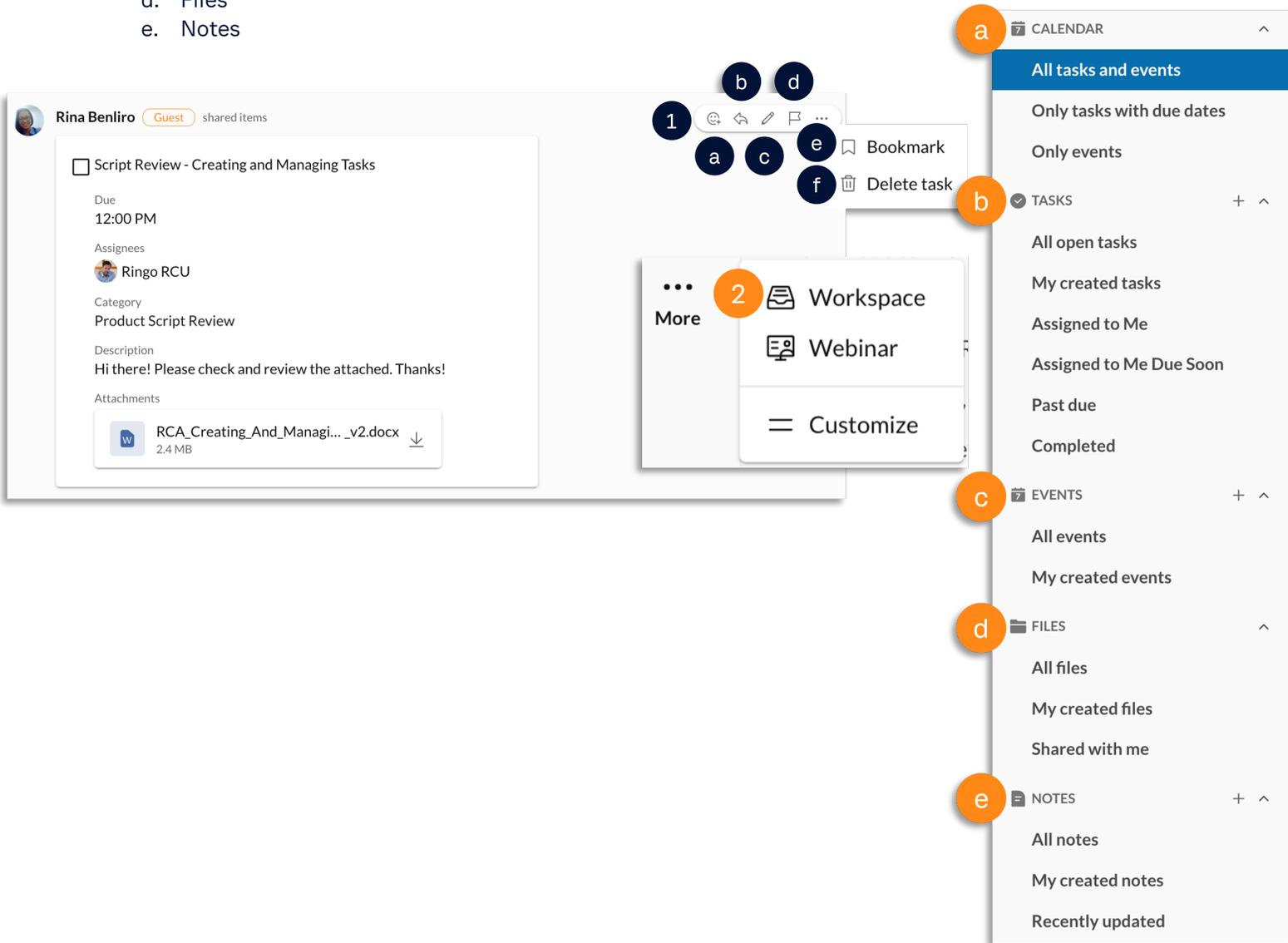
RingCentral App:
Using Personal Folders

The RingCentral app allows you to create personal folders to sort your conversations, helping you more easily access them by giving you the power to arrange them in folders that you label.

Creating a New Personal Folder

Follow these steps to create a new Personal Folder:

1. Click **New Folder**.
2. Type your preferred **Folder name**.
3. Type the names of the individual, group, or team conversations you want to include in this folder.
4. Select a **Color tag** to help you easily identify it.
5. Click **Create** to finish.
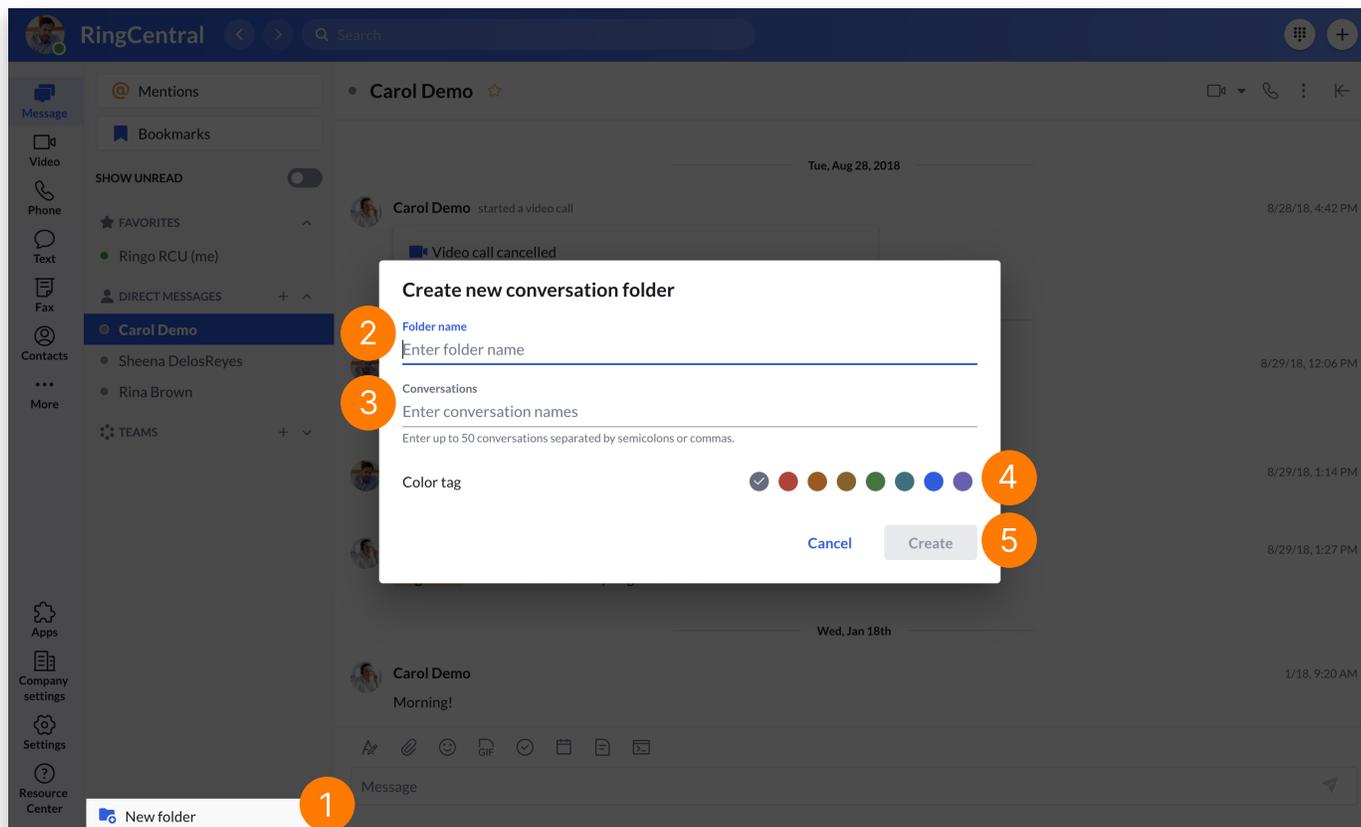
Moving a Conversation to a Personal Folder

You can freely move any of your individual, group, or team conversations to a new or existing Personal Folder. Follow these steps:

1. Select your preferred conversation.
2. Click **More**.
3. Select **Move conversation to**, then you can either:
   a. Create a new Personal Folder.
   b. Select an existing Personal Folder.
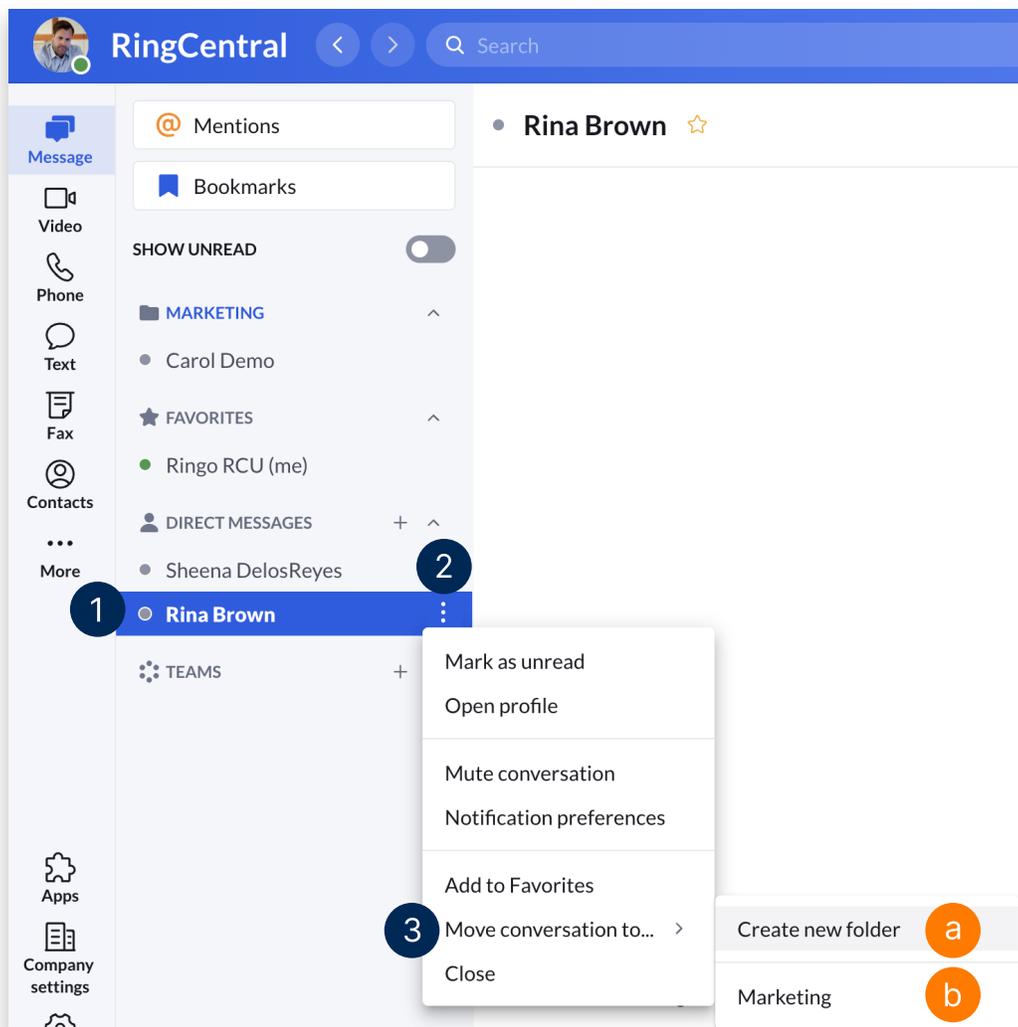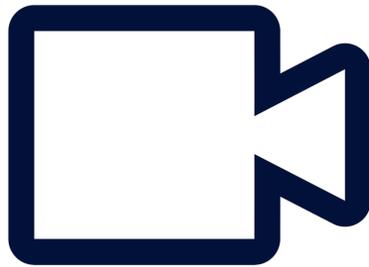
Video

RingCentral App:
Video Meetings Basics

The RingCentral app enables you to host, join, and schedule video meetings conveniently from one location. This quick guide gives an overview of how to access Video within the app and basic functions to use.

1. Click **Video**.
2. Select **Meetings**.
   a. **Start** – Starts a video meeting with you as the host.
   b. **Schedule** – Allows you to schedule a video meeting for later, while providing the options to configure the meeting settings.
   c. **Join** – Lets you join a video meeting using a meeting ID or link.
   d. **Share in room** – Allows you to instantly share your screen to a nearby RingCentral Rooms Controller using Proximity Sharing or by entering a meeting ID.
   e. **Connect your calendar** – Prompts you to log in to your Microsoft, Exchange, or Google account. This lets you synchronize your calendar with the RingCentral app to display your upcoming meetings and calendar events. **Connect with Calendar** allows you to connect your device calendar to the RingCentral app.
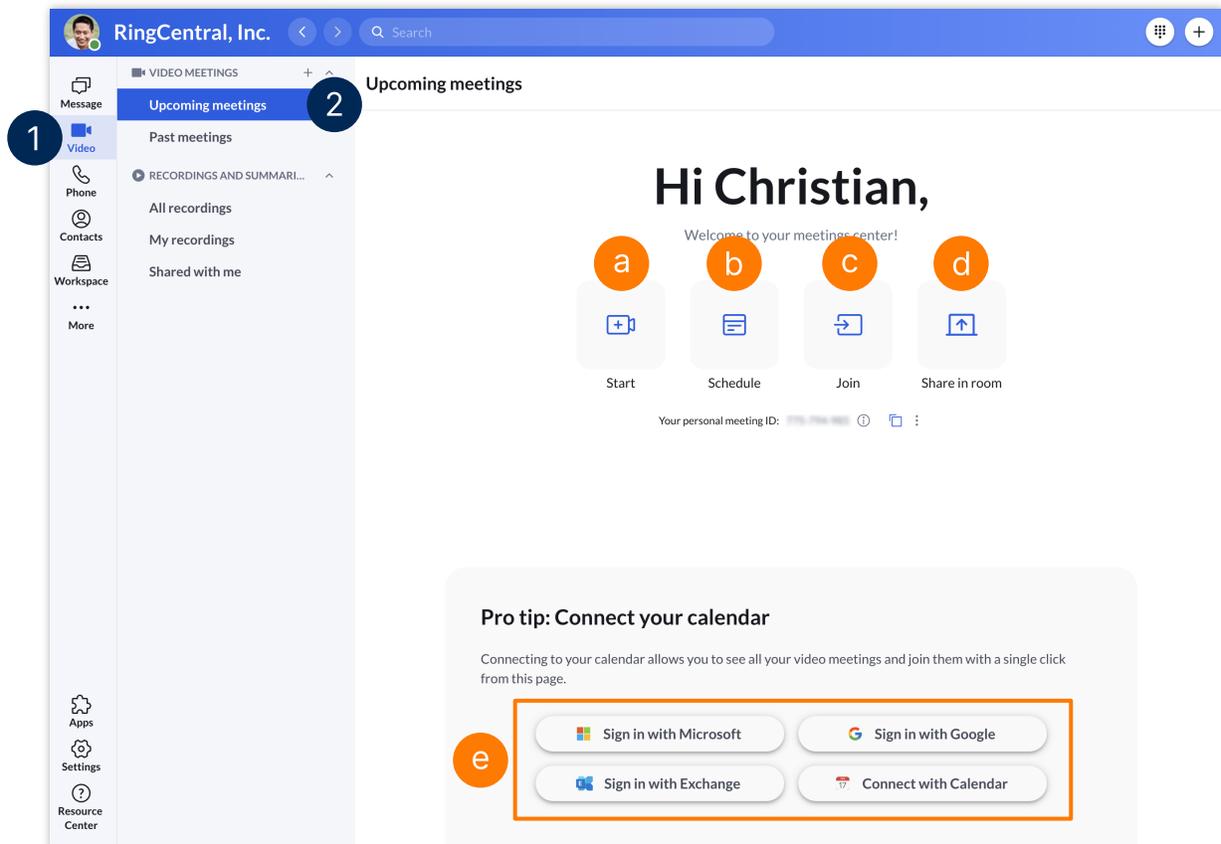
RingCentral Video: Scheduling Through the Outlook Add-In

The RingCentral Scheduler Outlook add-in makes scheduling RingCentral Video sessions in Outlook easy. With this add-in, RingCentral users with a Microsoft Outlook account can quickly add a meeting to any new or existing calendar event.

Installing the RingCentral Scheduler add-in

Follow the steps below to integrate the RingCentral Scheduler to your Outlook account:

1. Open the Outlook desktop or the web application and click ⊞ **Get Add-ins**.
   Note: Depending on your operating system and if you are using the new Outlook interface, you can find the **Get Add-ins** button under the **Home** ribbon (Windows) or **Tools** (MacOS).
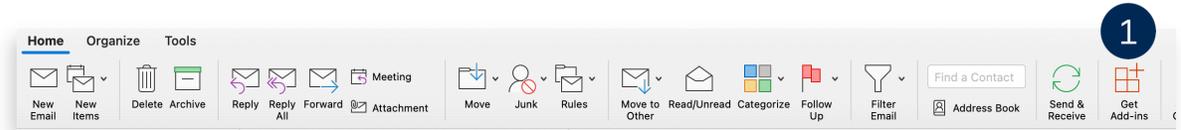
2. A browser window opens. In the search box, type "RingCentral Scheduler" and select the add-in from the search results.
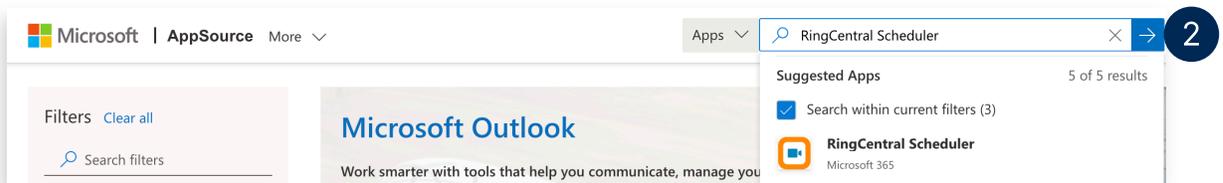
3. Click **Get it now** to begin the installation.
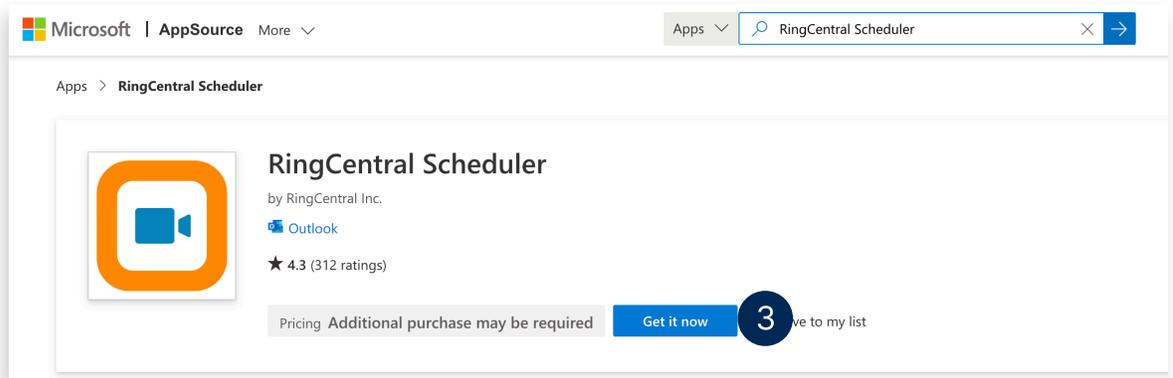
Scheduling a Meeting Using the RingCentral Scheduler Add-In

Follow the steps below to add the RingCentral Video to your Outlook meeting invites:

1. Click Schedule with RingCentral.
2. If using the add-in for the first time, you are prompted to sign in to your RingCentral account. Click **Sign in.**
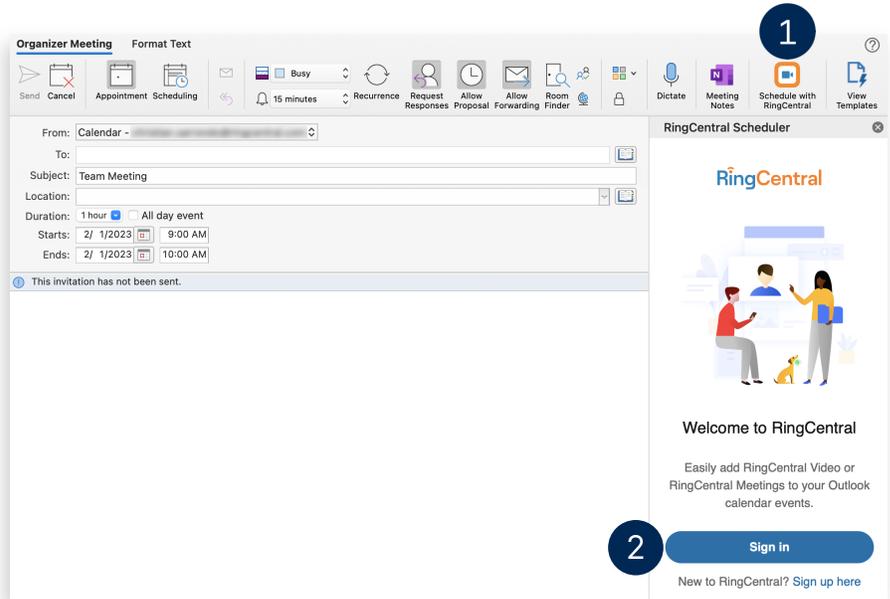
3. Once signed in, set your preferred meeting settings.
4. Click **Add meeting**. The details are automatically added to the meeting description.
5. Copy the meeting link in the description and add it to the Location field of the invite so participants can more easily view and access it.

   Note: If you are using the new Outlook interface, the Location field is automatically populated with the meeting link.
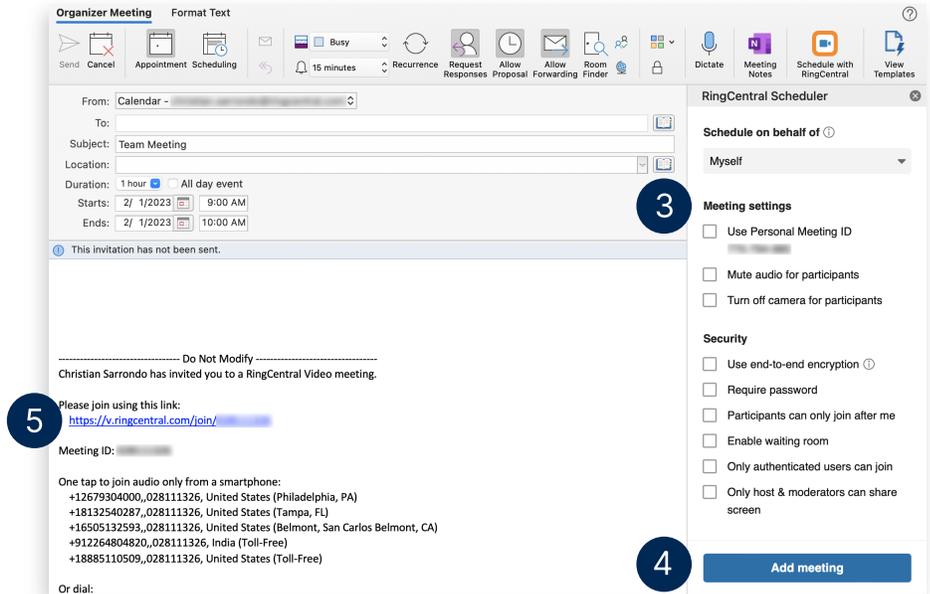
RingCentral Video: Avoiding Audio, Video, and Screen Sharing Pitfalls

RingCentral gives you the option to control the audio, video, and screen sharing settings. The following tips help you avoid common pitfalls and ensure seamless and productive video meetings.

Avoiding Audio Pitfalls

1. While in a video meeting, click the microphone icon to **Mute** and **Unmute** your audio.
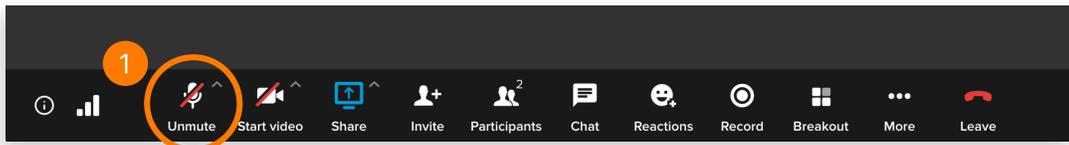
2. Check your audio source to ensure that other participants can hear you and vice versa. Click the ⌃ arrow next to the mute button.
   a. Verify that your preferred microphone and speakers are selected.
   b. Choose between the different levels of background noise removal.
   c. To check if your audio output is clear, click **Test mic and speaker settings**.
      i. Click **Test microphone** to test the microphone clarity.
      ii. Click **Test speakers** to test your audio output.
   d. When clicking **Leave computer audio**, participants lose your audio and vice versa.
   e. When clicking **Switch to phone call**, RingCentral video asks for your phone number. The system then calls the number to transfer the meeting.
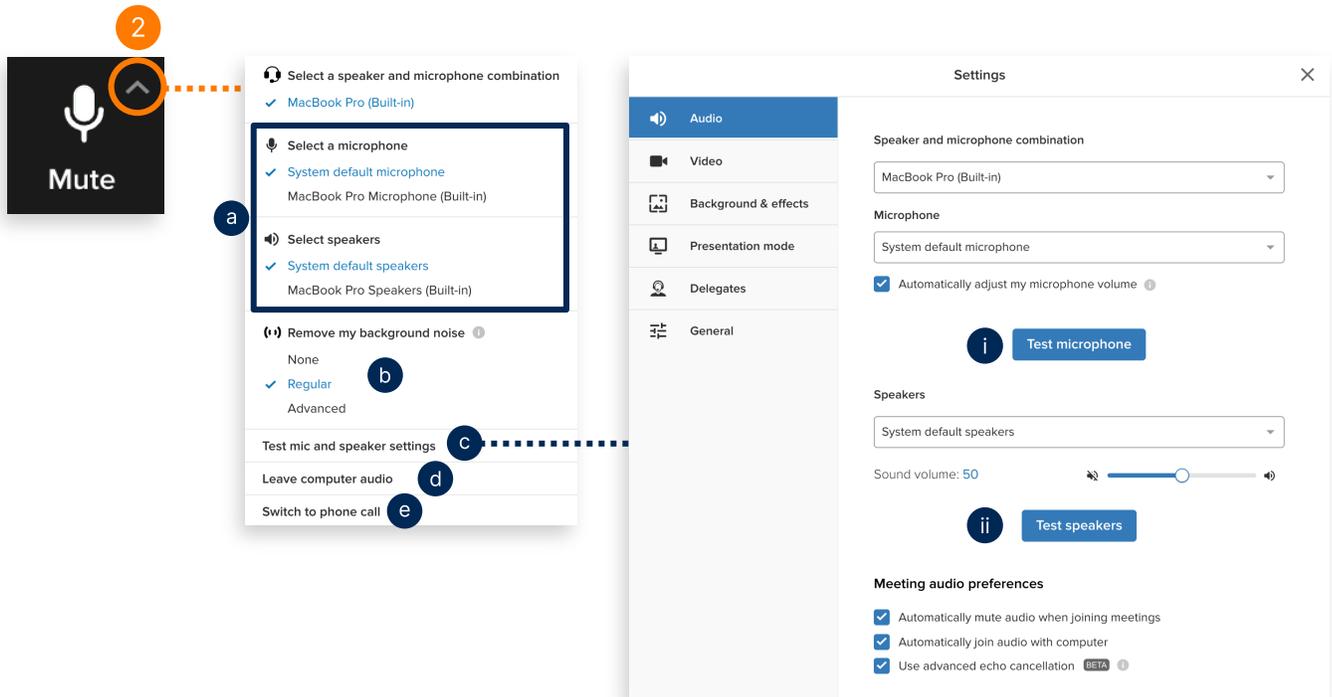
Avoiding Video Pitfalls

1. Click the video icon to turn your camera on and off.
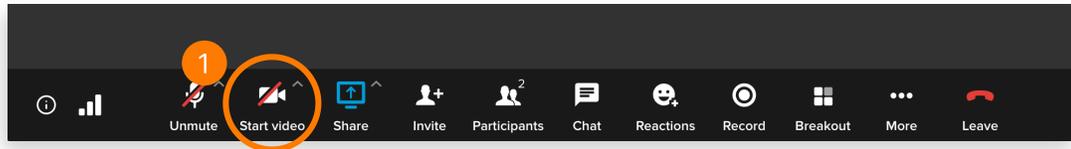
2. To verify the video source and other video settings, click the ⌃ arrow next to the video button.
   a. Verify your preferred video source is selected.
   b. Click **Background & effects** to configure your virtual background settings and other effects.
      i. Select from the default backgrounds, a GIF, or upload your own image or video.
      ii. Under Effects, you can enable **Touch up my skin** and **Improve my video in low light** to improve your appearance in meetings. Choose **Auto-follow**, so the camera automatically adjusts to keep you at the center of the frame as you move around.
   c. Select **Disable incoming video** so anyone who joins the meeting has their video off by default.
   d. To check your video settings and clarity, click **Video settings**.
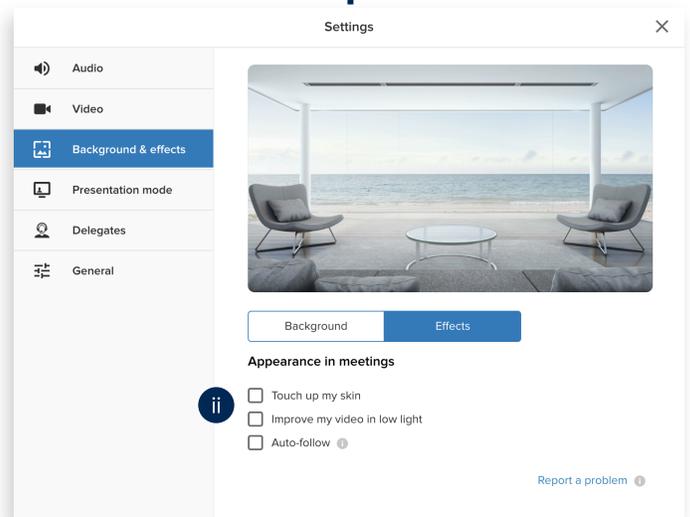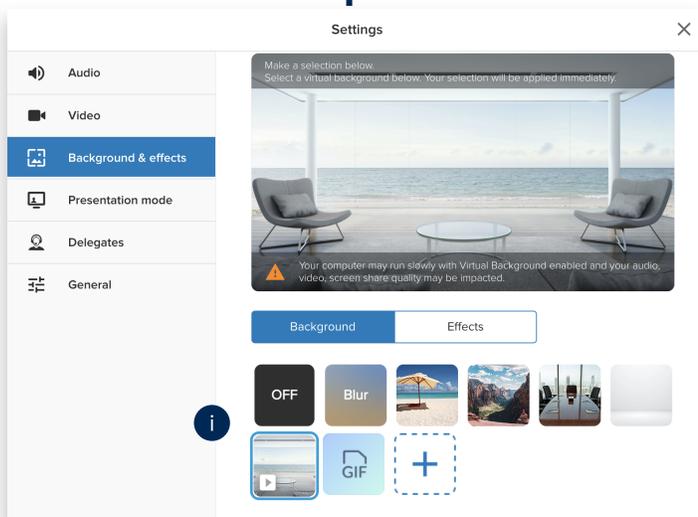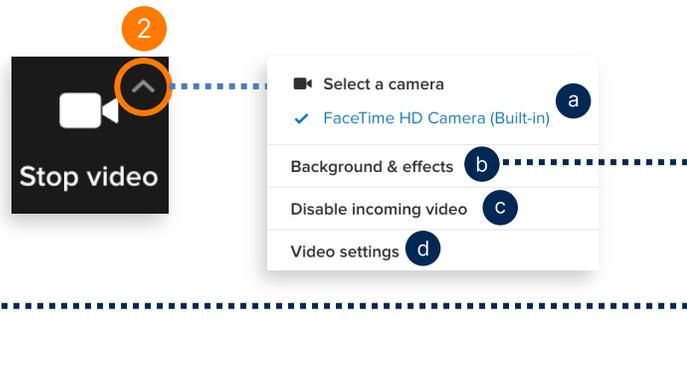
Avoiding Screen Sharing Pitfalls

1. Clicking the **Share** button opens a new window. You have the option to choose what to share.
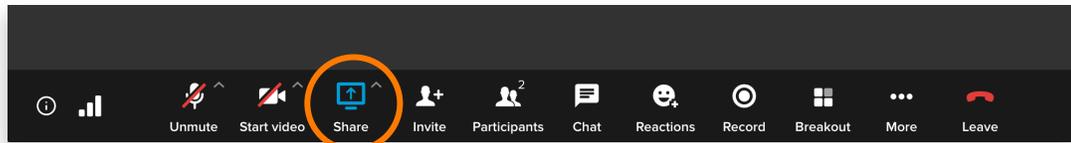
   a. Share your entire screen – All applications, files, etc. If working on multiple screens, you can select which one you want to share.
   b. Application window – Only the application or file that is selected is shared.
   Note: A yellow border appears to indicate which screen, application, or file is about to be shared.

2. Once you have selected what to share, click **Share**. Verify that the yellow border highlights the screen or window that you intended to share.
   i. While sharing, click **Annotations** to enable screen annotations for yourself and all participants.
   ii. Click **Participants** to see a list of meeting attendees. The popup window also allows you to send chats while in the meeting.
   iii. **Remote control** gives options to allow or disable requests to control your desktop remotely.
   iv. Click **Stop sharing** when you are finished.
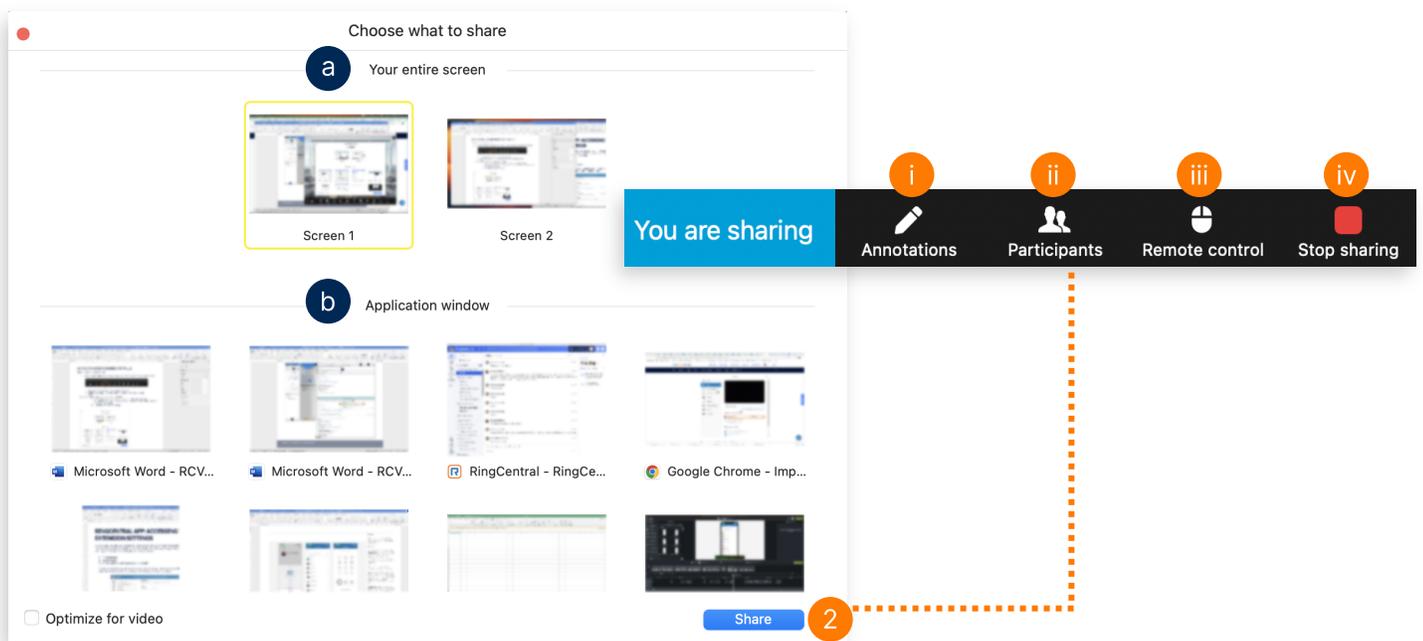
RingCentral Video: Recording Video Meetings

RingCentral Video lets you record and share your video meetings, so you can easily archive important meetings or share them with people who weren't able to attend.

Recording Video Meetings

Use the following steps to record a RingCentral Video meeting session:

1. Click **Record** to start recording the video meeting.
2. If necessary, click **Pause** to pause the recording.
3. Click **Resume** to resume recording the video meeting.

The recording is automatically saved once the video meeting ends.

Note: The ability to record is only available to the meeting host and participants who have been assigned as moderators.
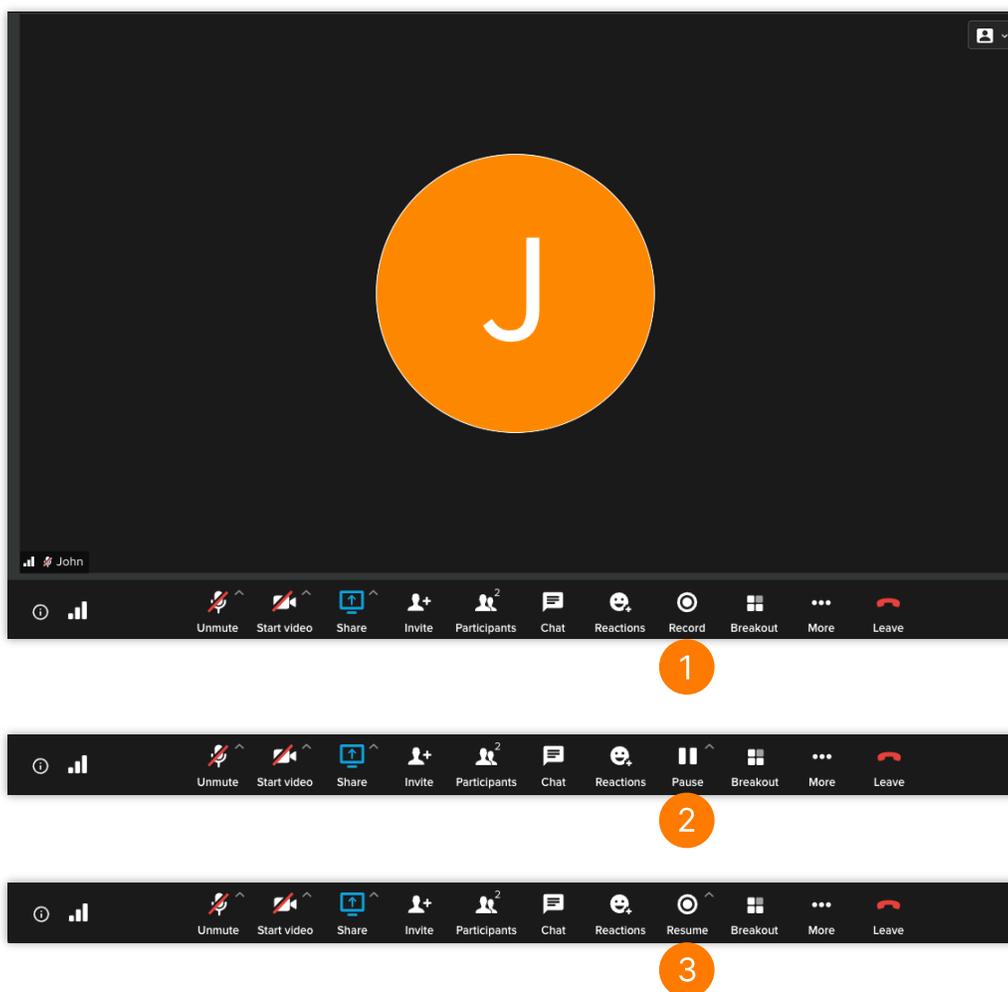
Accessing Video Meeting Recordings in the RingCentral App

You can access your recorded video meetings in the RingCentral app by following these steps:
1. Click **Video**.
2. Select your preferred list of recordings.
3. Select a specific video meeting recording and press ▷ **Play** to view it. A new window displays. This allows you to view the video meeting details, including the meeting Summary, Transcript, and Highlights.

   You can also choose the following options:
   A. ⬆ **Share recording** – Allows you to share the recording with others.
   B. ⬇ **Download** – Downloads the video meeting recording to local storage.
   C. ⋯ **More** – Provides additional options:
      a. ✎ **Edit summary** – Allows you to add and edit the summary of the recording. RingCentral Video advanced meeting insights uses artificial intelligence (AI) to summarize meeting contents. Modify the AI-generated summary or add and edit keywords by using this feature.
      b. 🗑 **Delete** – Deletes the selected recording and removes it from all shared contacts.
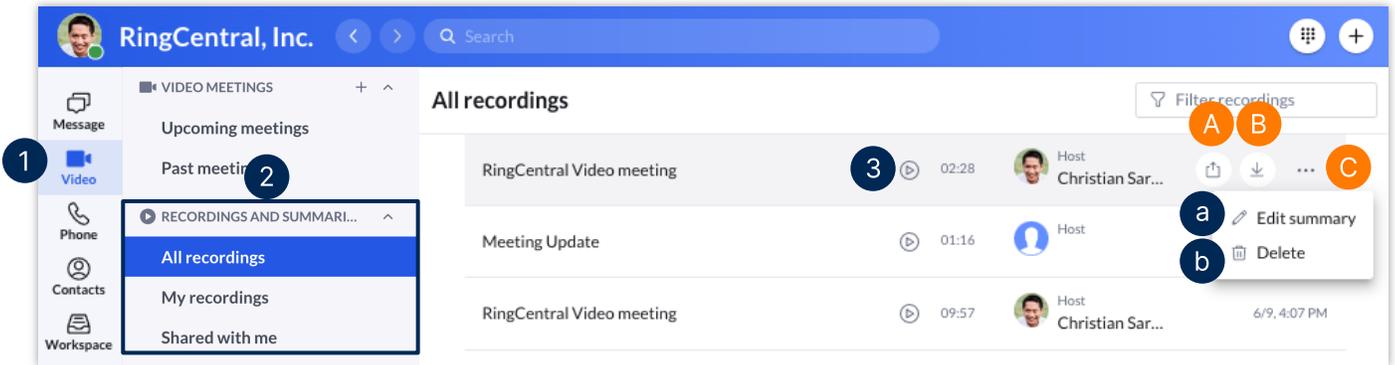
RingCentral Video: Switching Video Meetings Between Mobile and Desktop

RingCentral Video lets you switch between your smartphone and computer or vice versa, without disconnecting from the video meeting, allowing you to multitask with ease.

Note: You need to be logged in to the RingCentral app on your computer and smartphone at the same time using the same profile to use this feature.

Switch Video Meetings from Your Computer to Smartphone

During an active video meeting on your computer, follow these steps to switch to your smartphone:

1. From your smartphone, tap **Switch meeting to this device**.
2. Tap **Switch**.
3. Choose how to join audio.
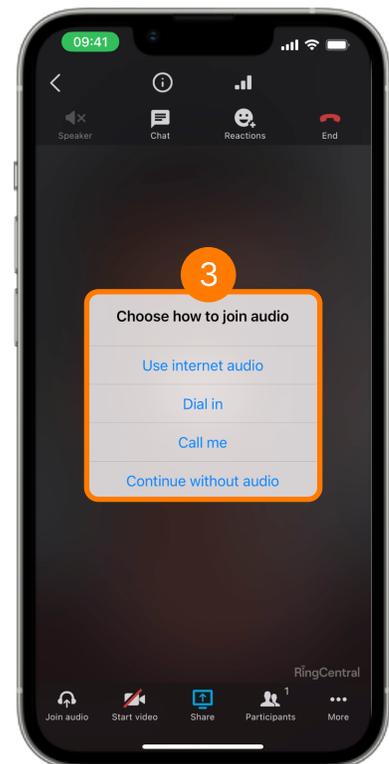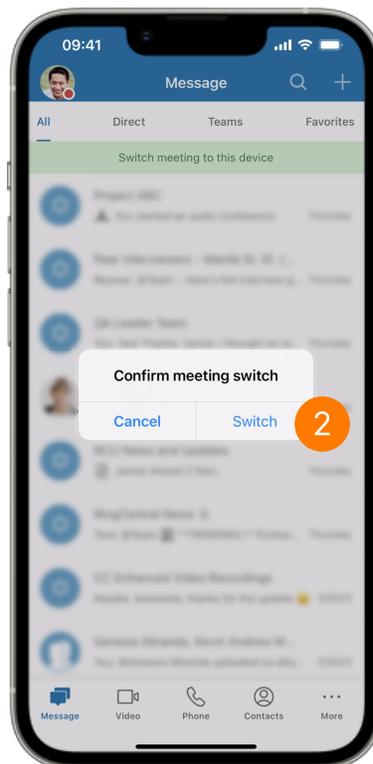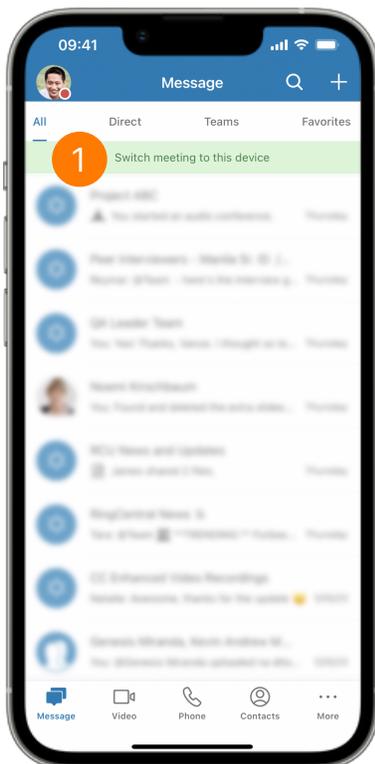
Switch Video Meetings from Your Smartphone to Computer

During an active video meeting on your smartphone, follow these steps to switch to your computer:

1. From your computer, click **Switch meeting to this device**.
2. Click **Switch**.
3. Choose how to join audio.
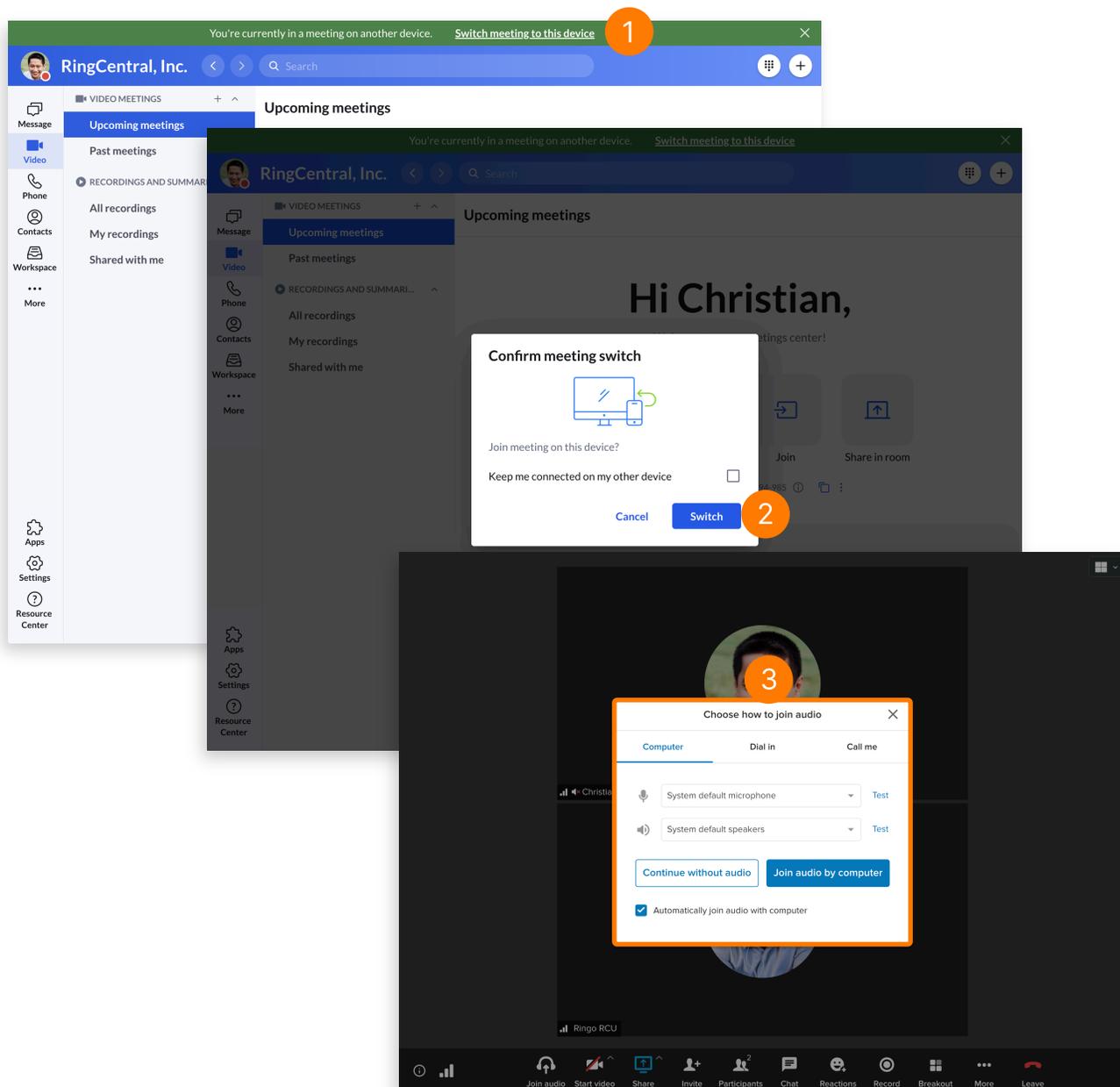
RingCentral App:
Using the Call to Video Feature

The RingCentral app's Call to Video feature allows you to quickly switch from a voice or audio conference call to a RingCentral Video meeting or screen sharing session. This feature makes it easier for users to share their screen or video without the need to end the call and initiate a video meeting invite. Follow the steps below to do this:

1. Within an active voice call, click **Video**.
2. Select from either of the two options shown:
   a. **Switch to video call** - You are switched from the call to an active RingCentral Video meeting. The people in the call are automatically added as video meeting participants.
   b. **Share screen** - You are switched from the call to an active RingCentral Video meeting and the screen sharing selection window is activated. You can then start sharing a selected screen or window with the participants.

Note: If others in the call are not using the RingCentral app, they stay on the call as an audio-only, dial-in participant in the RingCentral Video meeting.
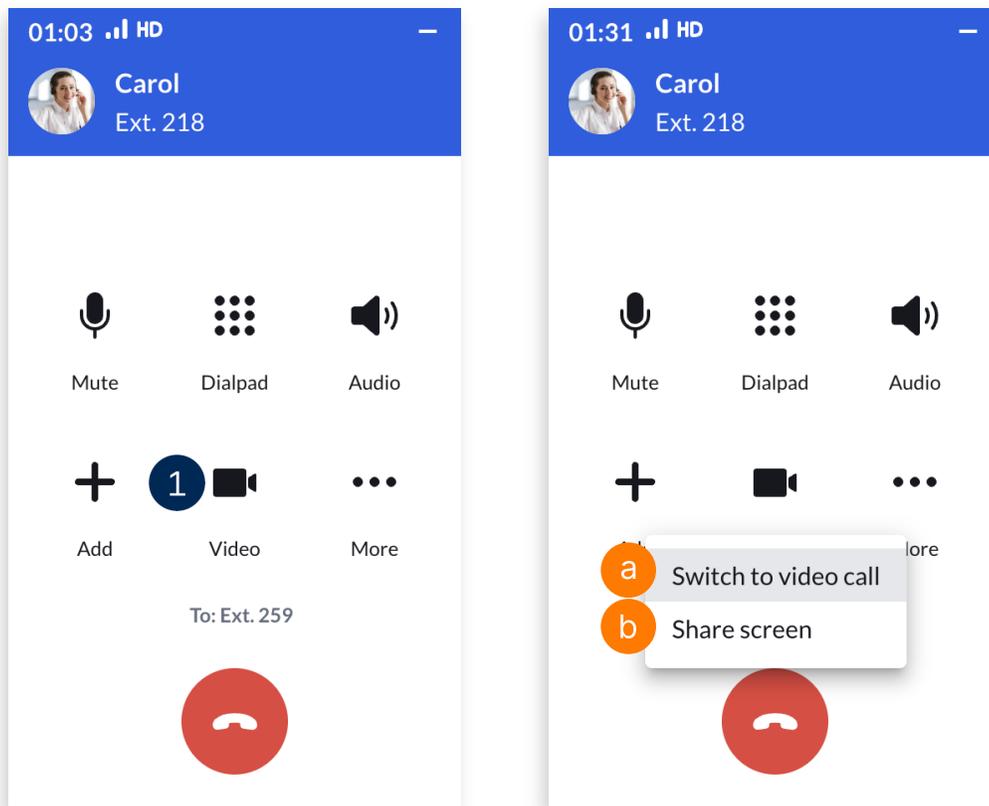
RingCentral Rooms: Hosting and Joining Video Meetings

Hosting and joining video meetings using your RingCentral Rooms system is quick and easy. This job aid givesan overview of these processes.

Hosting Video Meetings

Use the following steps to host a video meeting session using RingCentral Rooms.

1. In your Rooms Controller, press the **Meet Now** icon.
2. Type the names of the contacts to invite to your video meeting. All invited participants must beincluded on your RingCentral contacts list.
3. Press the **Meet Now** button to start the video meeting.

> You can invite more participants using the Invite button, while the meeting is ongoing.
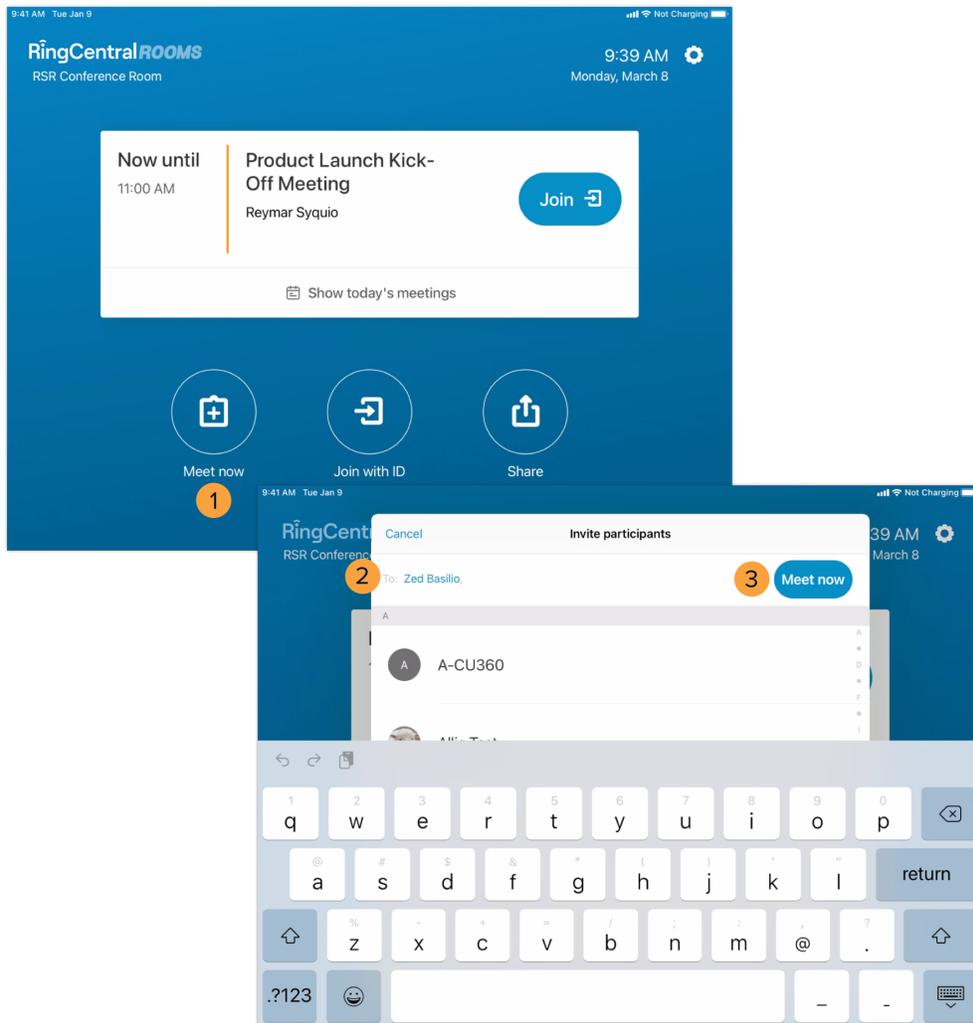
Joining Scheduled Video Meetings

If your Rooms license is connected to your calendar service, easily join a scheduled video meeting by pressing **Join** (1) in the calendar event displayed in your Rooms Controller.
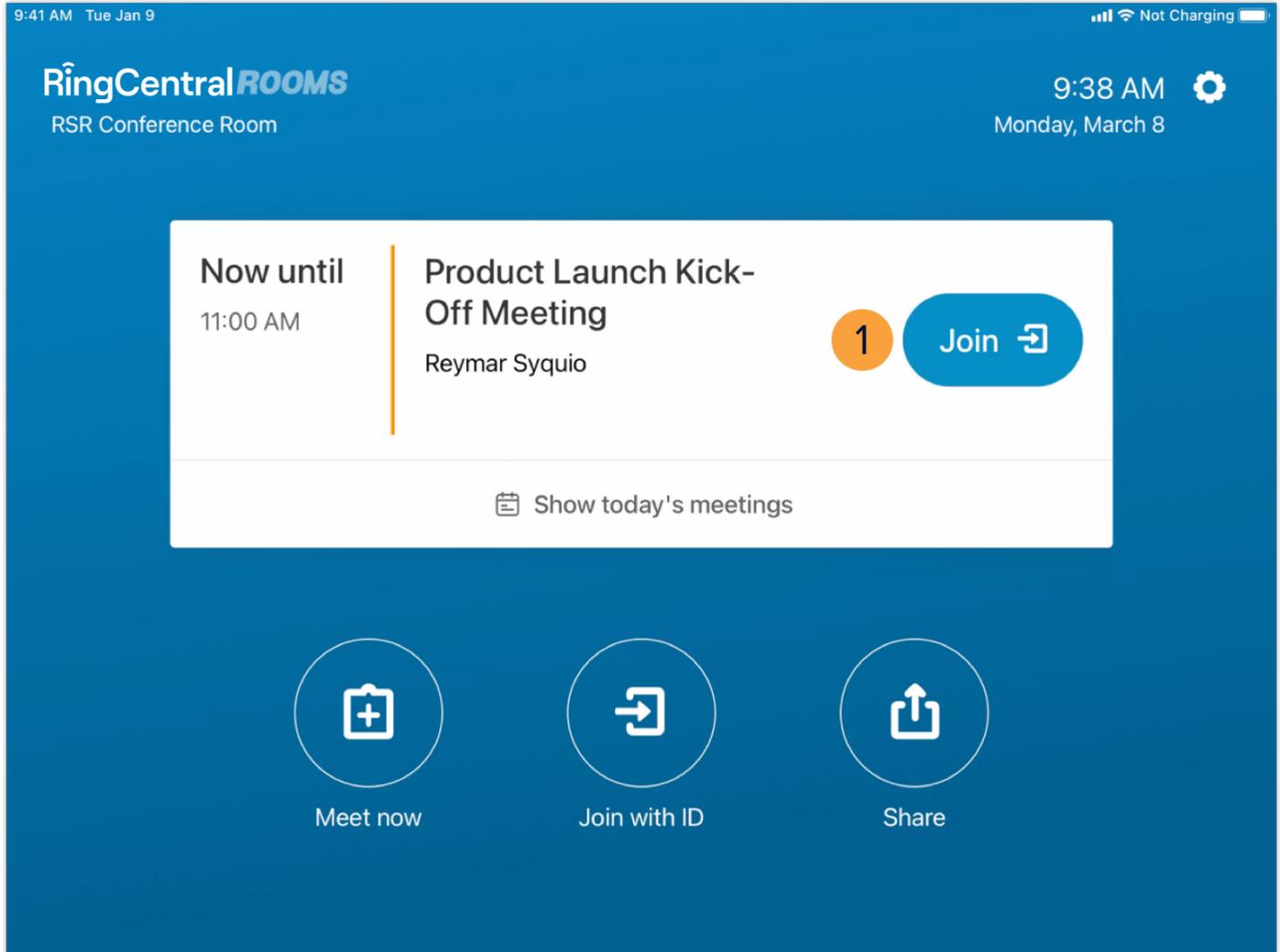
Joining Video Meetings Using a Meeting ID

Use the following steps to join a video meeting session using a Meeting ID:

1. In your Rooms Controller, press **Join with ID**.
2. Type the appropriate Meeting ID.
3. Press **Join**.

If the video meeting requires a password, follow these additional steps:

4. Type the meeting password.
5. Press **Join** again.
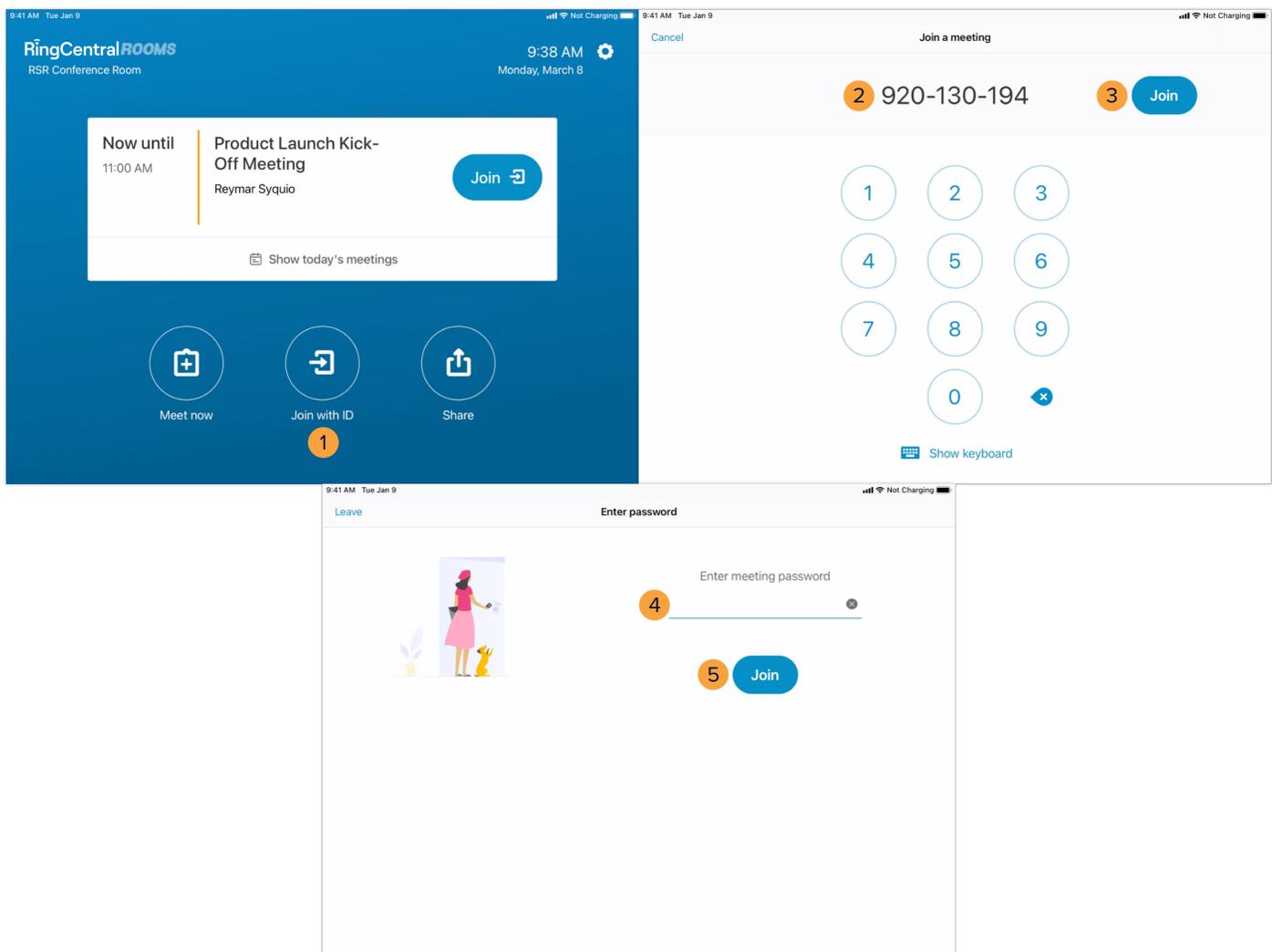
RingCentral Rooms:
Using Video Meeting Controls

RingCentral Rooms gives you the ability to efficiently manage your video meetings through the Rooms Controller.
This quick guide gives an overview of the available controls in your Rooms Controller during anactive video meeting.

1. **Mute / Unmute mic** – Mutes or unmutes your microphone audio.
2. **Turn off / Turn on camera** – Enables or disables your video camera feed.
3. **Share screen** – Displays a URL and code you can use to share content from a device, besides theRoom Controller, within the video meeting.
4. **Settings** – Opens the menu to access RingCentral Rooms' Audio and Video settings.
5. **Invite** – Allows you to invite RingCentral contacts as video meeting participants or phone numbers asaudio-only participants.
6. **Participants** – Displays the participants list. As the video meeting host, it also allows you to mute participants, request they enable or disable their video, remove them from the meeting, assign themas moderators, lock the entire video meeting, and control who can share content.
7. **Record** – Records the video meeting; this feature is only available to the video meeting host andassigned moderators.
8. **Views** – Allows you to choose how your video meeting participants are displayed on your connected RingCentral Rooms monitors.
9. **Control camera** – Lets you control the zoom, pan, and tilt of your connected RingCentral Roomscamera, provided that the camera has these features.
10. **Exit meeting** – Allows you to leave the video meeting or end the video meeting for everyone (if youare the host).
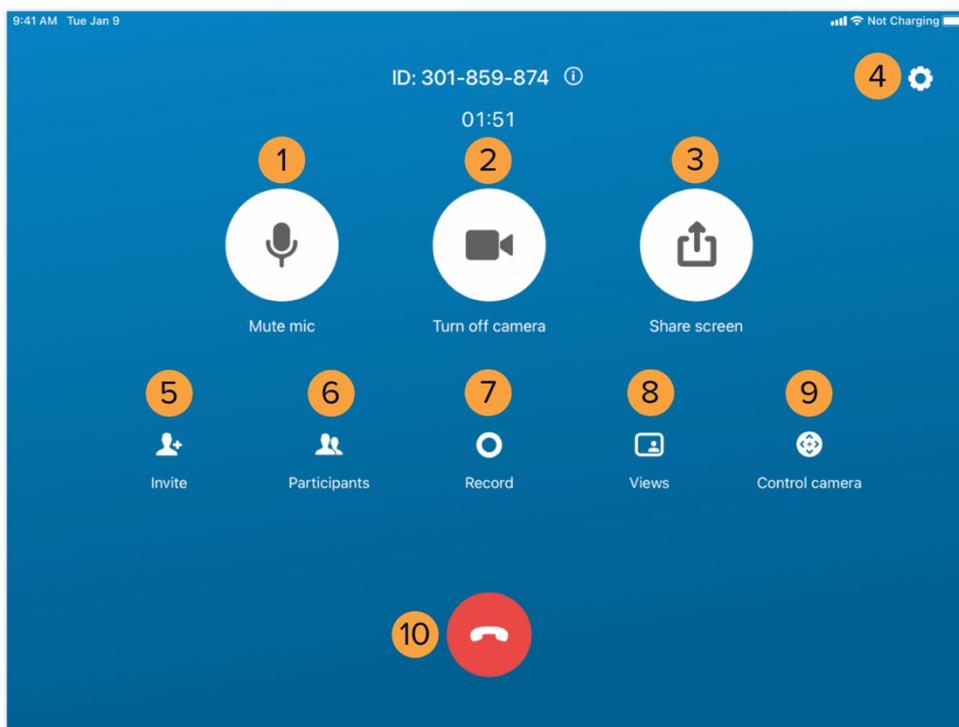
RingCentral Rooms: Testing Audio Devices

Before using the RingCentral Rooms system to host and join video meetings, take time to configure and test your audio devices to ensure that you minimize the risk of audio issues. This quick guide gives an overview of how to access RingCentral Rooms' audio settings through your Rooms controller and which settings to check.

1. In your Rooms Controller, press **Settings**.
2. Press **Audio** and check these settings:
    a. **Software audio processing** – This setting enables software echo cancellation, noise reduction, and automatic gain control for your microphone. Activating this enhances youroverall microphone audio quality.
    b. **Microphone** – Allows you to choose the microphone used with your RingCentral Roomssystem.
    c. **Volume** (Microphone) – Adjusts the audio gain of the selected microphone.
    d. **Level** – Shows the volume level that your selected mic currently picks up. This is useful inhelping determine that the microphone works.
    e. **Speaker** – Allows you to choose the speaker to be used with your RingCentral Roomssystem.
    f. **Volume** (Speaker) – Adjusts the audio gain of the selected speaker.
    g. **Play test sound** – Plays a test audio to help determine if the selected speaker works.
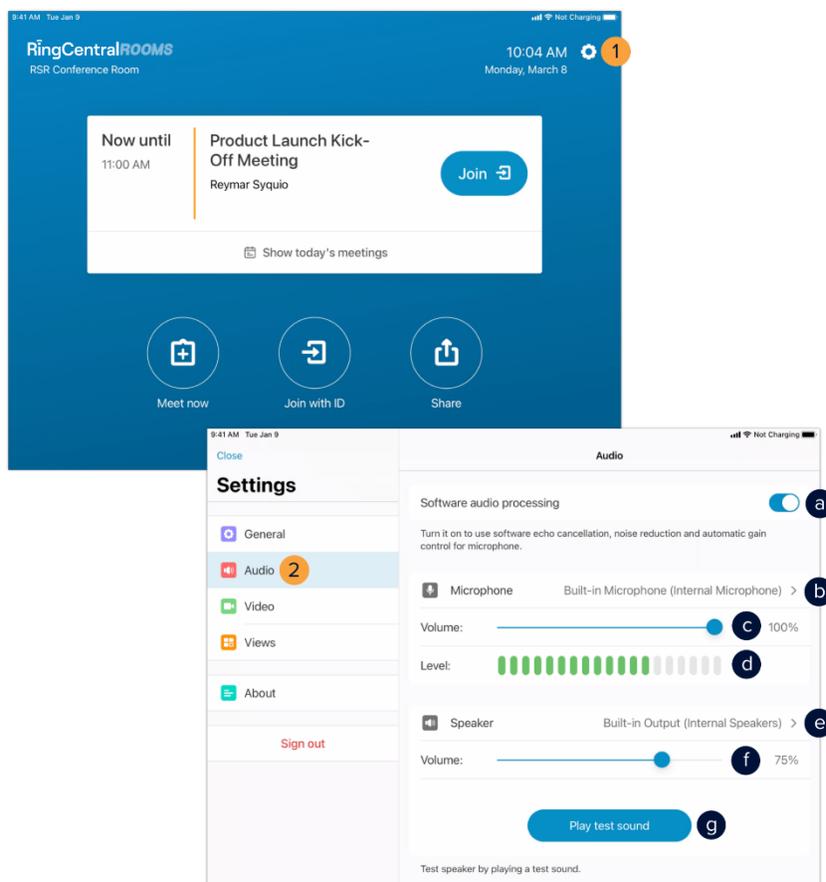
Phone

RingCentral App:
Making Calls and Checking Voicemails

The RingCentral app enables you to initiate calls in several ways, and allows you to check, listen, and download your stored voicemails. This guide shows you how to make calls and manage your voicemails conveniently within the app.

Initiate a Call Within an Active One-on-one Conversation

1. In the Message section, select your preferred one-on-one conversation.
2. Click ☎ Phone.
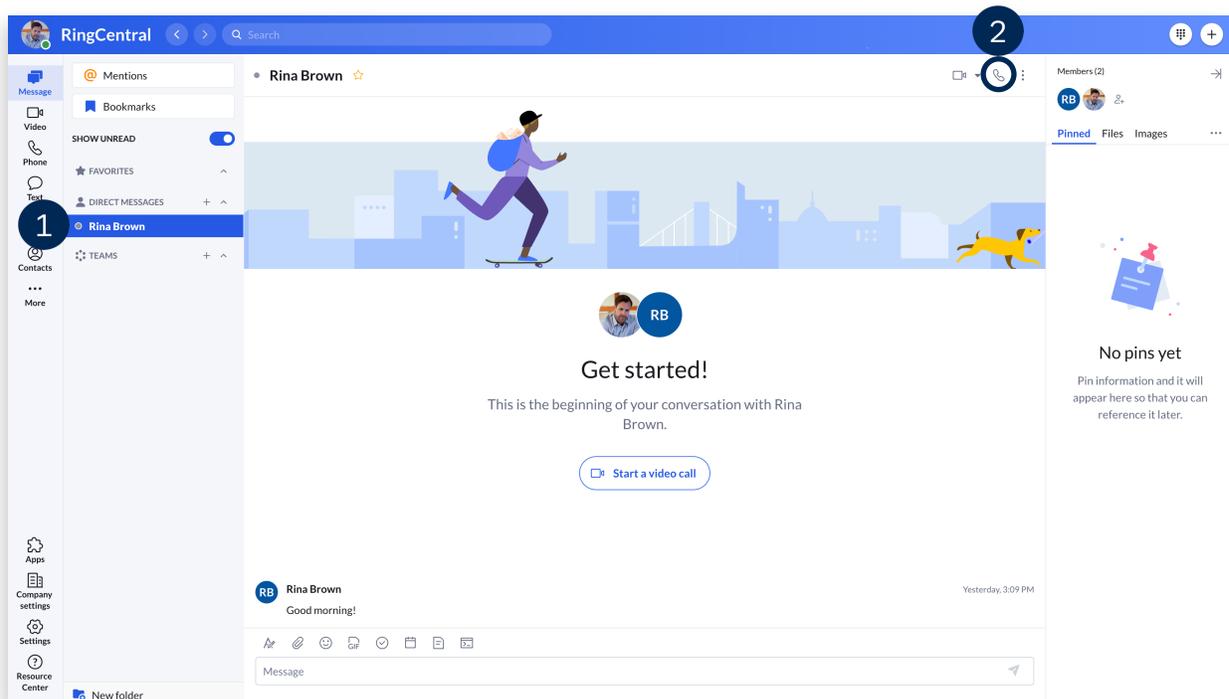
Initiate a Call Manually

1. From anywhere in the app, start by clicking the ⊞ **Dialpad**.
2. Enter your contact's name or phone number in the dialpad.
3. Click 📞 **Dial** to initiate the call.
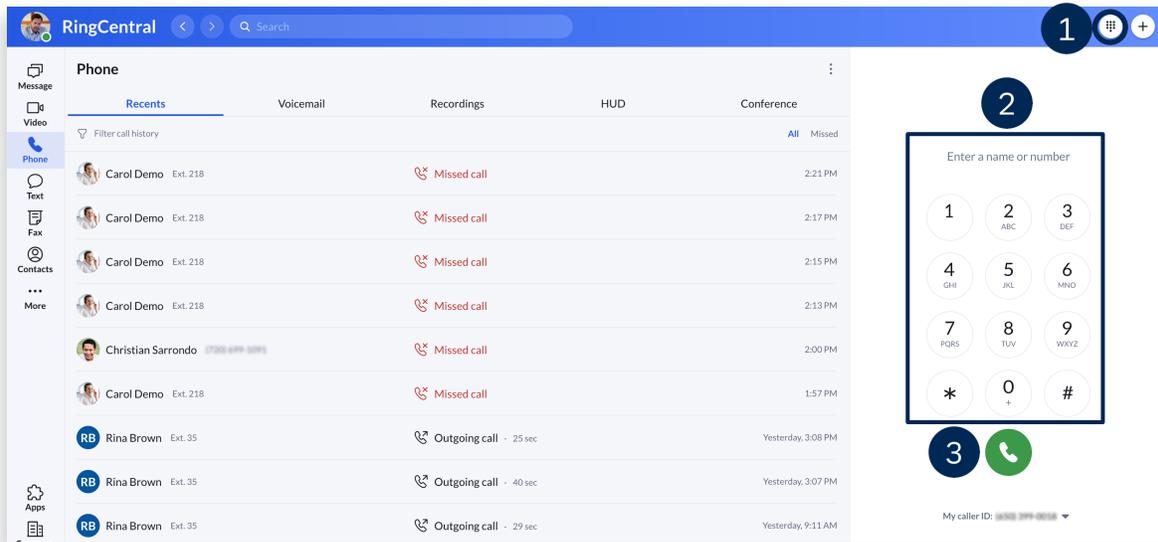
Initiate a Call From Your Contacts List

1. Click **Contacts**.
2. Type the name of your contact in the **Filter all contacts** field.
3. Click 📞 **Phone** to initiate the call.
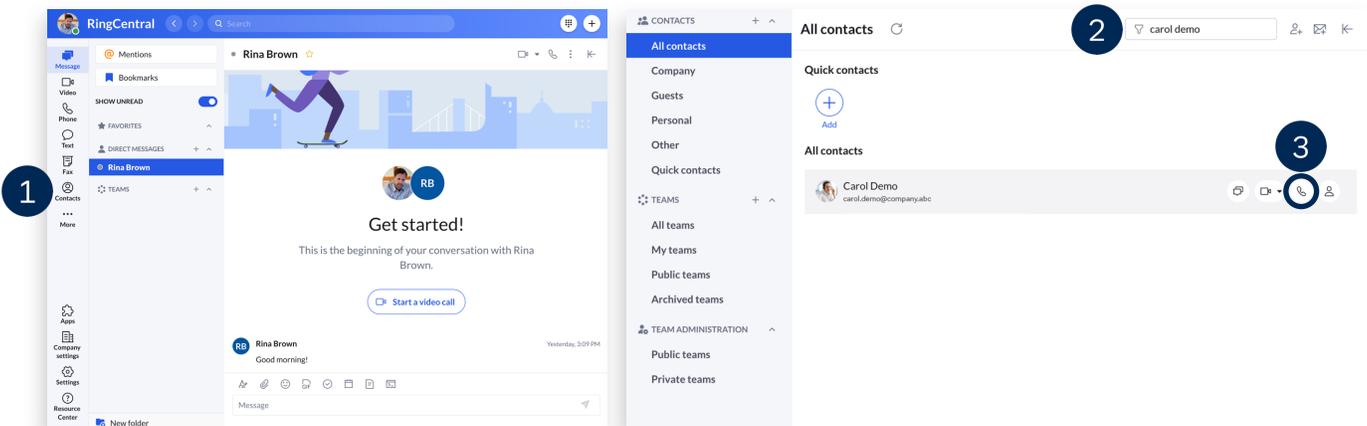
Check Your Voicemails

1. In the **Phone** section, select the **Voicemail** tab.
2. Click on a message to display additional information, including the caller's details, transcript, and phone number dialed. The following options are also available:
   a. 📞 **Phone** – Call the sender.
   b. 💬 **Text** or 🗗 **Message** – Reply to the sender via text or direct message, if they are a part of your organization.
   c. 📹 **Start video call** – Initiate a RingCentral Video meeting with the sender.
   d. ⊘ **Block number** – Block the sender's phone number.
   e. ▶ **Play** – Play the message.

   Click ⋮ **More** to access the following:
   f. ⬇ **Download** – Download the message as an MP3 file.
   g. 🚩 **Mark as read/unread** – Flag the message as read or unread.
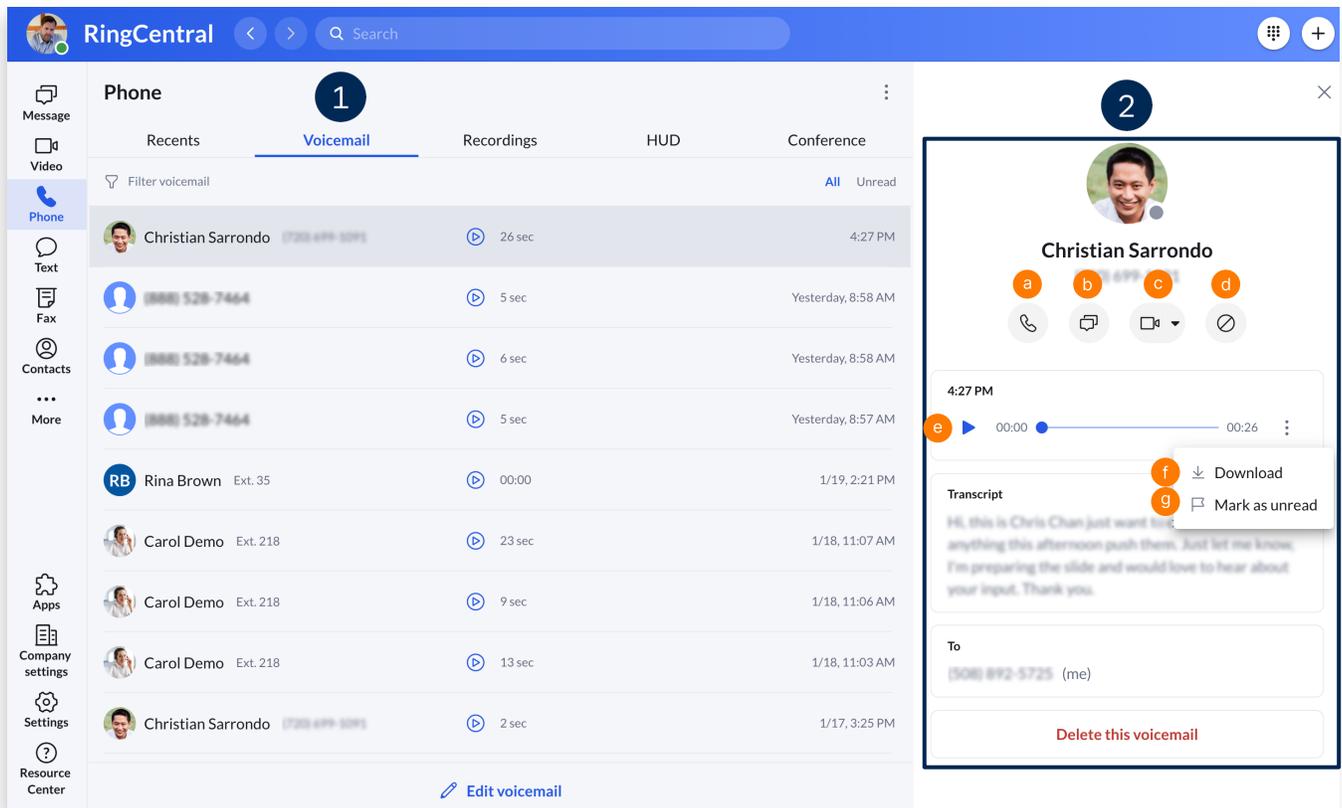
RingCentral App: Updating Your Voicemail Greeting

The voicemail greeting is what callers hear when they reach your voicemail box. Follow the steps below to personalize your voicemail greeting:

1. In the RingCentral app, go to **Settings**.
2. Select **Phone**.
3. Under Incoming calls, look for Voicemail and click **Edit**. A popup window appears.
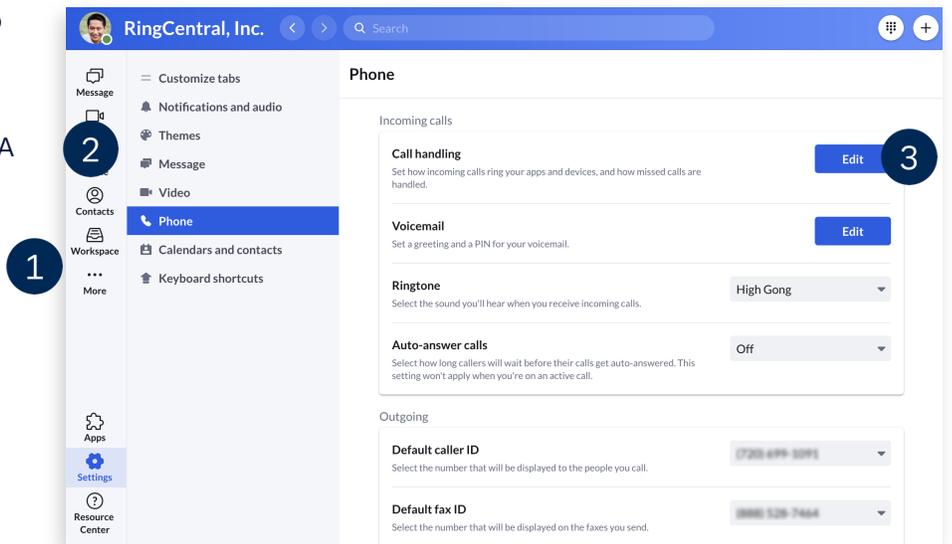
4. By default, your voicemail greeting applies 24/7. You can configure your account to play two distinct greetings for your work and after hours to let callers know when you are available and can return calls. To set your work hours, click **Edit schedule**.
5. Select **Specific work schedule** and update the time to reflect your working hours.
6. Click **Save**.
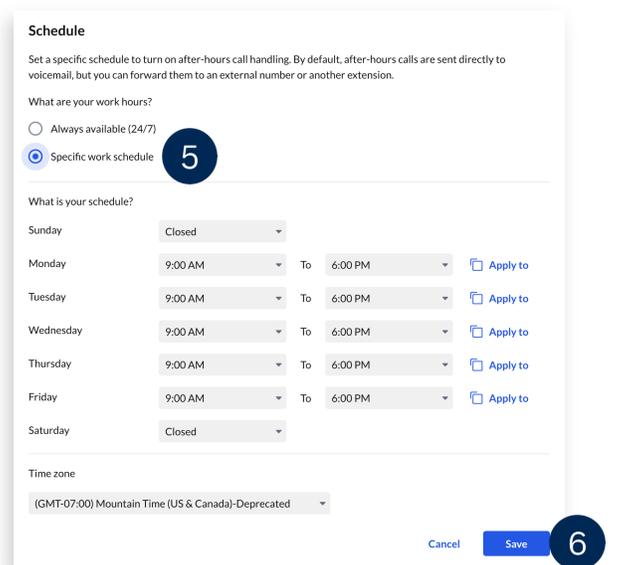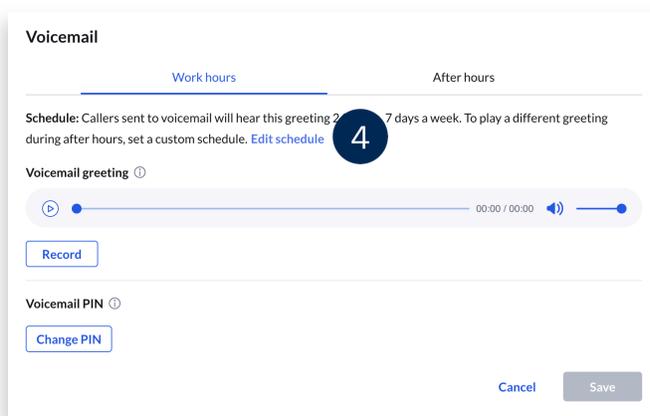
7. Once your works hours are set, you can proceed with configuring your voicemail greeting. The same steps apply to both Work hours and After hours. Start by clicking **Record**.
8. Here, you can playback the system-generated greeting or click the Record button to create a new one.
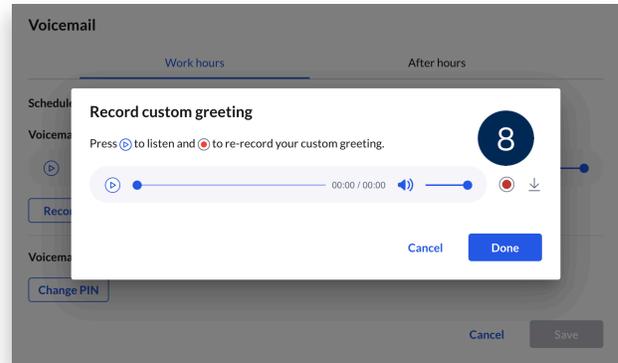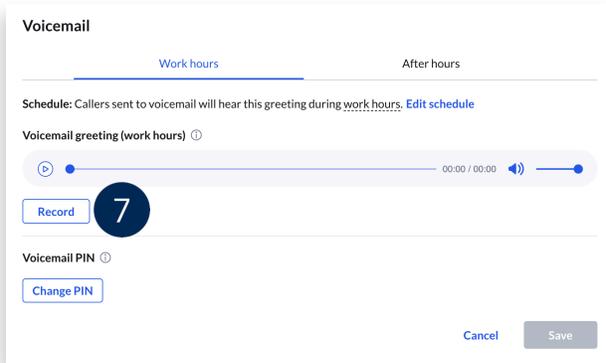
9. Select from the following options to customize your greeting:
    a. **Microphone** – Record your voicemail greeting using your computer microphone.
        i.   Click on the **Record** button. Start recording your greeting.
        ii.   When finished, hit the **Stop** button.
        iii. To listen to your recording, click **Play**.
        iv.   If you need to record again, use the **Record** button.
        v.   Use the **Upload** button once you are set with your recording.
        vi.   Click **Done**.
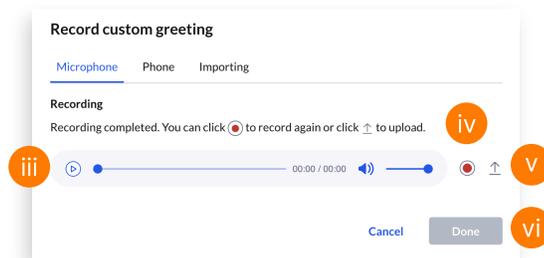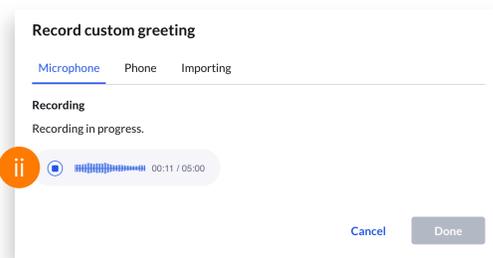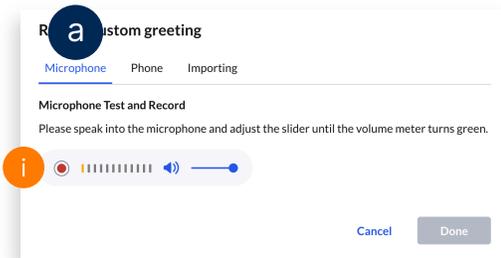
b. **Phone** – RingCentral calls you at your specified phone number to record your custom greeting.
   i. Enter the phone number you want the system to call. Note that RingCentral can only call you at a domestic (local or toll-free) number or an international number listed in your RingCentral account's call handling settings.
   ii. Click **Call now**. Follow the prompt on how to record your new greeting on your phone.
   iii. Once finished, click **Done**.
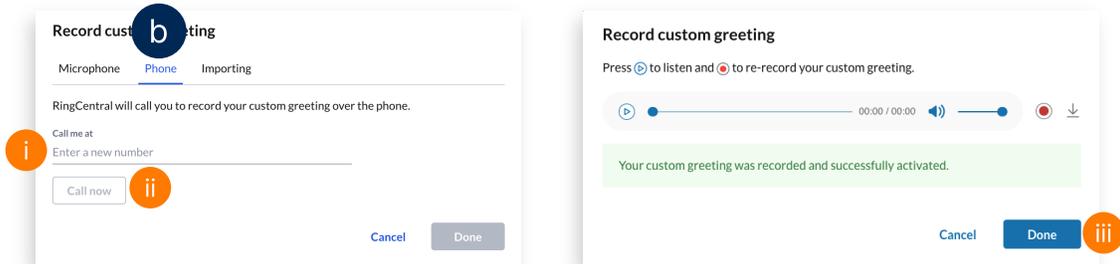
c. **Importing** – Upload a WAV or an MP3 file to play as your voicemail greeting. The following formats are recommended:
   - CCITT u-Law (G711a), 8kHz, 8 bit, mono
   - PCM, 8kHz, 16 bit, mono

   i. Click **Browse** and open the file from your computer.
   ii. Once selected, the uploaded file automatically applies. Click **Done** to proceed.
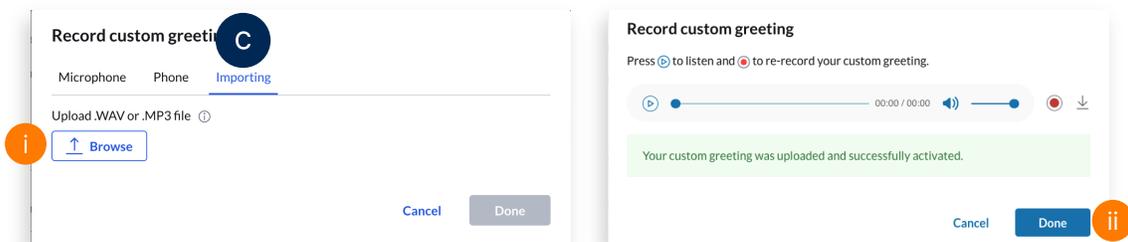
10. If needed, you can switch back to the system-generated greeting at any time by clicking **Reset to default**.
11. Click **Save**.
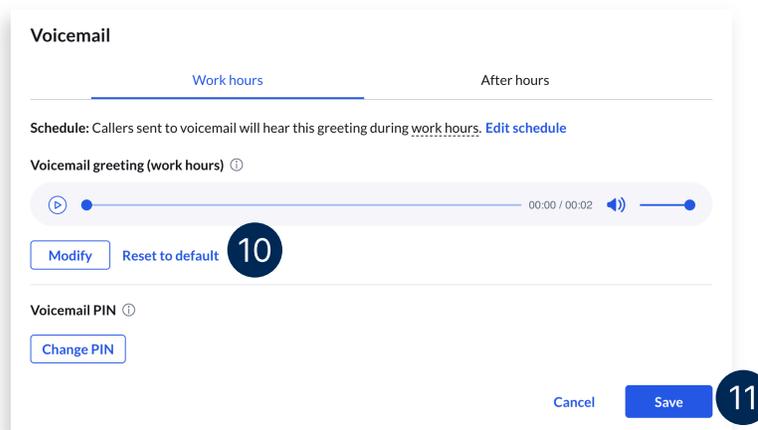
RingCentral App: Adding Callers

Adding participants in an active call has never been easier when using the RingCentral app. The RingCentral app allows you to have up to nine people on any active call for a maximum of ten participants.

Follow these steps to add participants to your active call:

1. Click **+ Add**.
2. There are two ways for you to add participants to the call:
   a. Type your preferred contact name or phone number. The RingCentral app automatically looks up people in your contacts list and displays a selectable list. You can also type the complete phone number and click 📞 **Dial**.
   b. Click 🕐 **Recent calls** and choose from the list of contacts.
3. Once the new call connects, click 🏃 **Merge to conference** to add the participant.

   NOTE: *You can repeat the steps above to have up to ten (10) participants in the call, including yourself.*
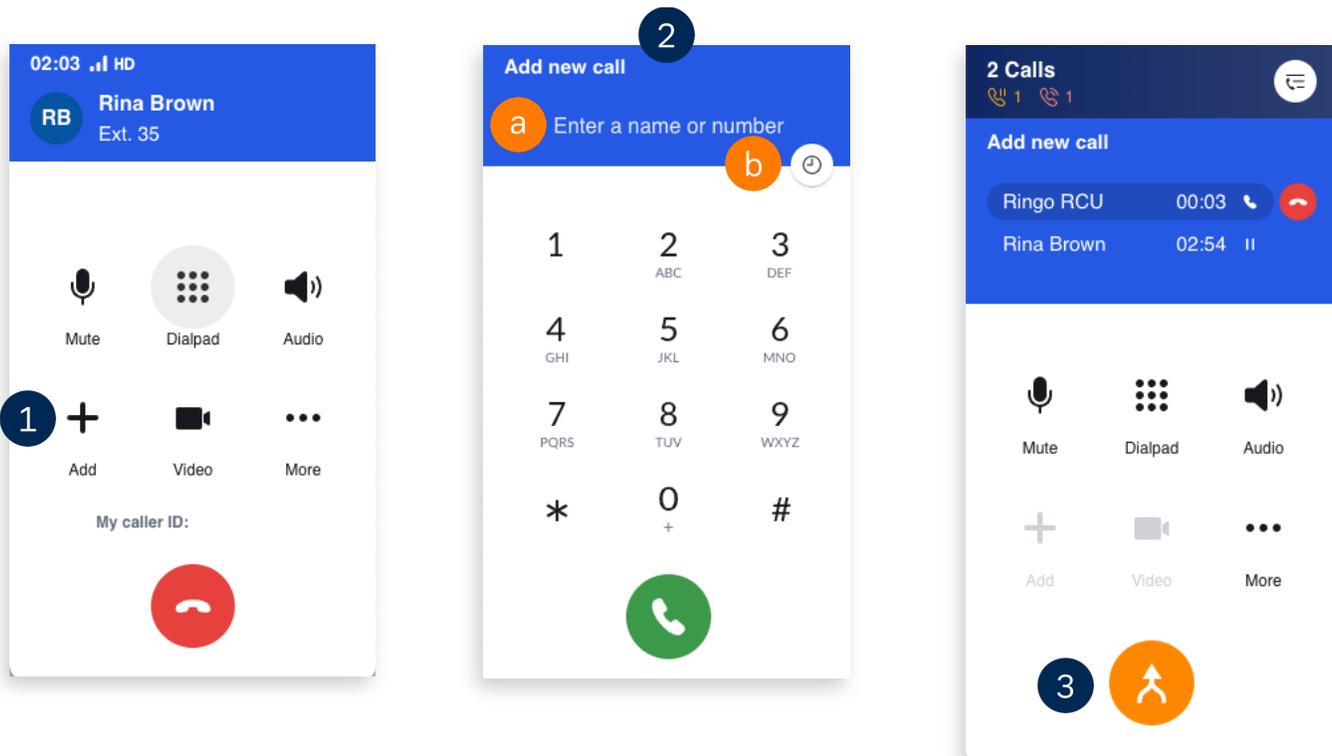
RingCentral App: Transferring Calls

The RingCentral app allows you to transfer a live call to another phone or extension of your choice. Follow these steps to transfer an active call:

1. Click ⋯ **More**.
2. Select **Transfer**.
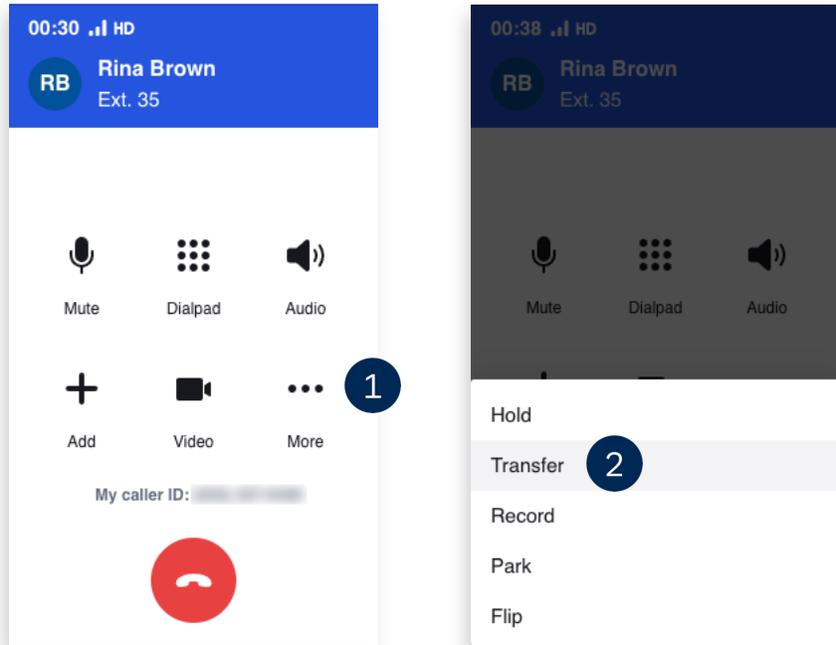
3. There are two ways for you to add the number of the person to transfer the call:

   a. Enter a contact's name or phone number. The RingCentral app automatically looks up people in your contacts list and displays a selectable list. You can also type the complete phone number.

   b. Click ⏱ **Recent calls** and choose from the list.
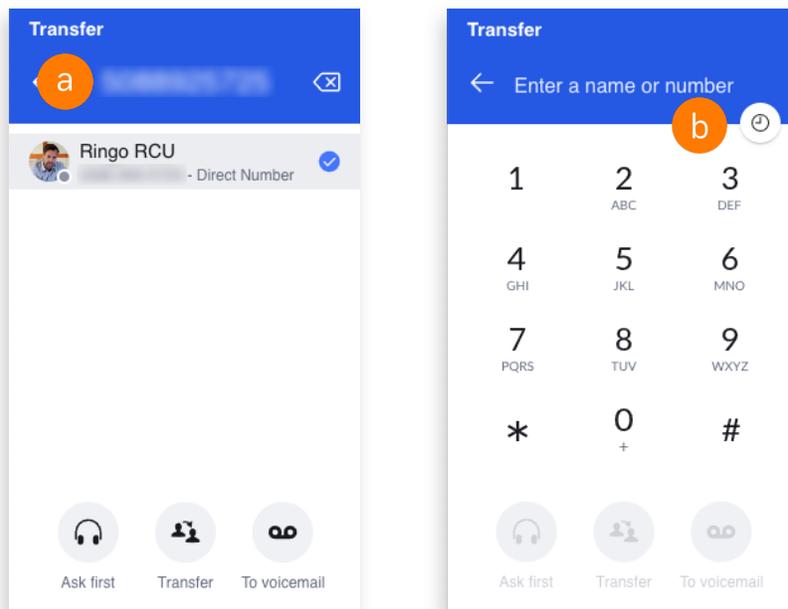
4. Choose one of the three transfer options:
    a. **Ask first** – Ensures the receiving party is available to accept the call by allowing you to talk to them first. At this time, the original call is put on hold until you complete the transfer. When you are ready to transfer the call, click 🟢 **Complete transfer**.
    b. **Transfer** – Immediately completes the call transfer to the receiving party and disconnects the call on your end.
    c. **To voicemail** – Sends the caller directly to the voicemail of the receiving party.
        NOTE: *This option is only available when you are transferring to a contact within your organization's RingCentral account.*
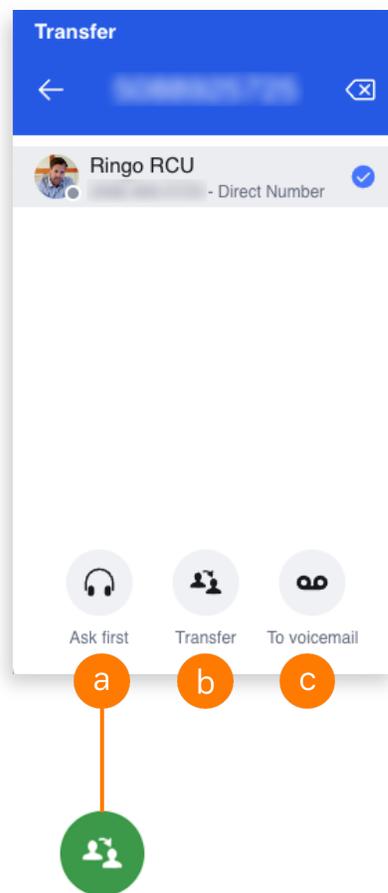
RingCentral App: Using Call Flip

The Call flip feature in the RingCentral app lets you transfer a live call from one device to another, including home phones, desk phones, and smartphones, without interrupting the call.

For example, you are about to leave the office but are currently engaged in a call using the RingCentral desktop app. You can initiate a Call flip from the desktop app to continue the conversation on your mobile phone.

While in an active call:

1. Click ⋯ **More**.
2. Select **Flip**.
3. Select the phone number of the device where you would like to continue the call.
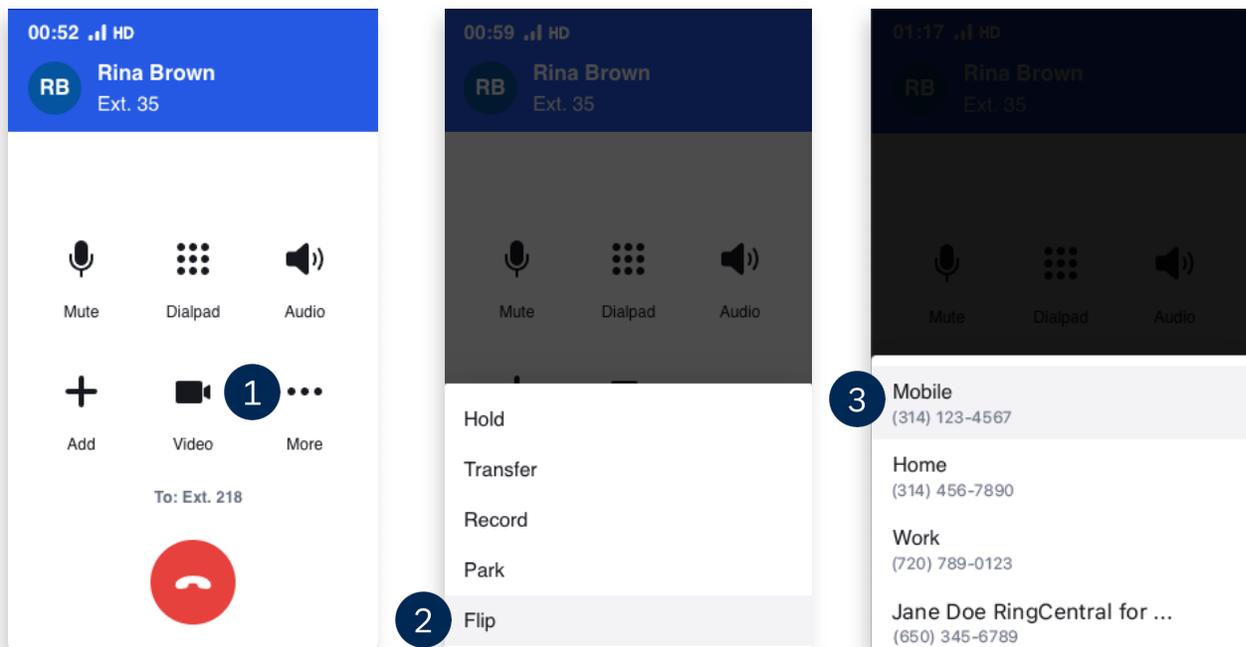
You can add or modify phone numbers that you can use with Call flip.

1. Click **Settings**.
2. Select **Phone**.
3. Click **Edit** next to Call handling.
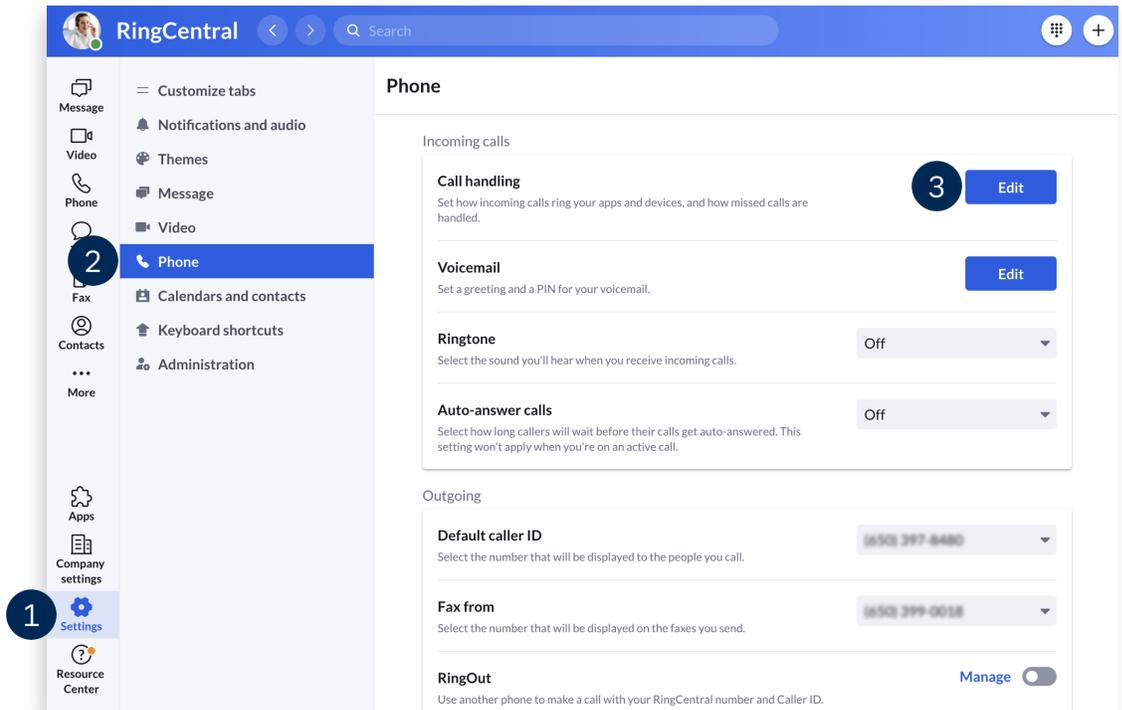
4. In the popup window, click **Add number or coworker** and complete the necessary details.
5. Click **Save**.
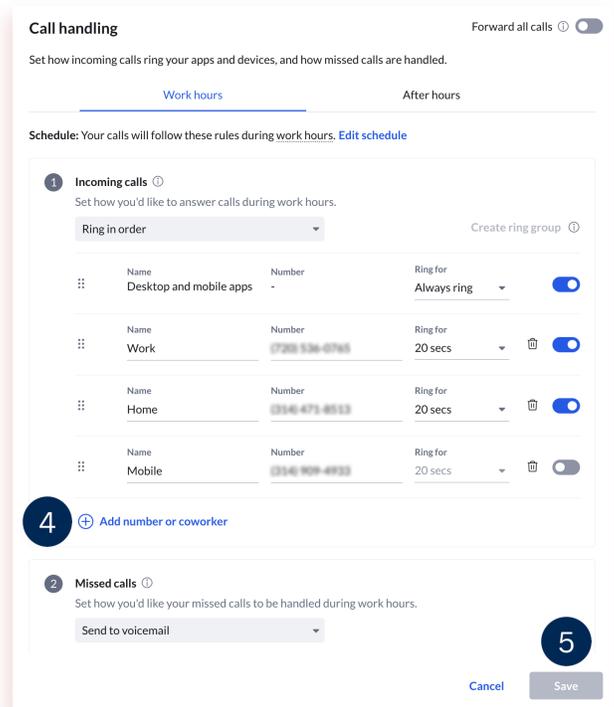
Learn more about configuring your Call Handling settings:
https://support.ringcentral.com/article/9758.html

RingCentral App: Using RingOut Through the RingCentral App for Mobile

When using the RingOut feature, your calls connect using carrier minutes instead of mobile data or WiFi. This is useful when you are travelling, and WiFi or mobile data connectivity is unreliable. Once enabled, RingCentral calls your chosen phone number, then automatically connects you to the phone number you dialed. Outgoing calls made with RingOut use the same Caller ID that you have set in the RingCentral app.

Note that initiating calls using the RingOut feature still requires internet connectivity.

Enabling the RingOut Feature

Follow the steps below to enable the RingOut feature:

1. In the RingCentral app, tap your **Profile Picture** to open the menu.
2. Under Settings, tap **Phone**.
3. Select **RingOut** under Outgoing Calls.

4. Tap the toggle to enable RingOut for outgoing calls.
5. If a number needs to be assigned, tap **Add RingOut number**.
6. Type in your RingOut number (your phone number).
7. Click **Done**.
8. Enable **Press 1 before connecting** to receive a prompt to press 1 before your RingOut calls connect.
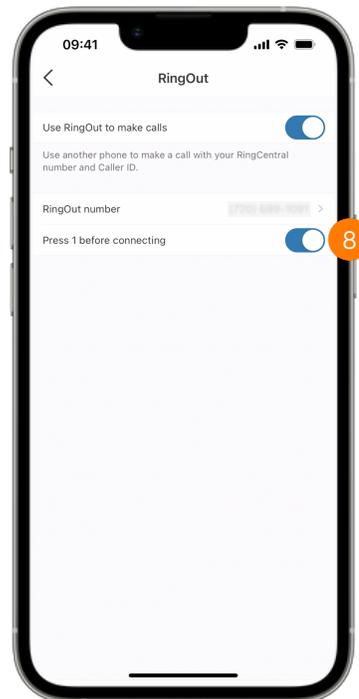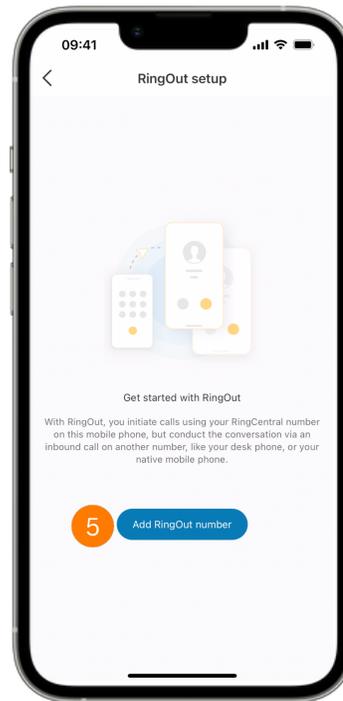
Calling Using the RingOut Feature

Follow the steps below to start calling using the RingOut feature:

1. Once you have assigned a RingOut number and selected RingOut as your calling mode, your calls will now connect via RingOut. Dial a number or choose a contact to start.
2. Notice that the path to connect to the other party appears.
3. You are now connected via the RingOut feature.
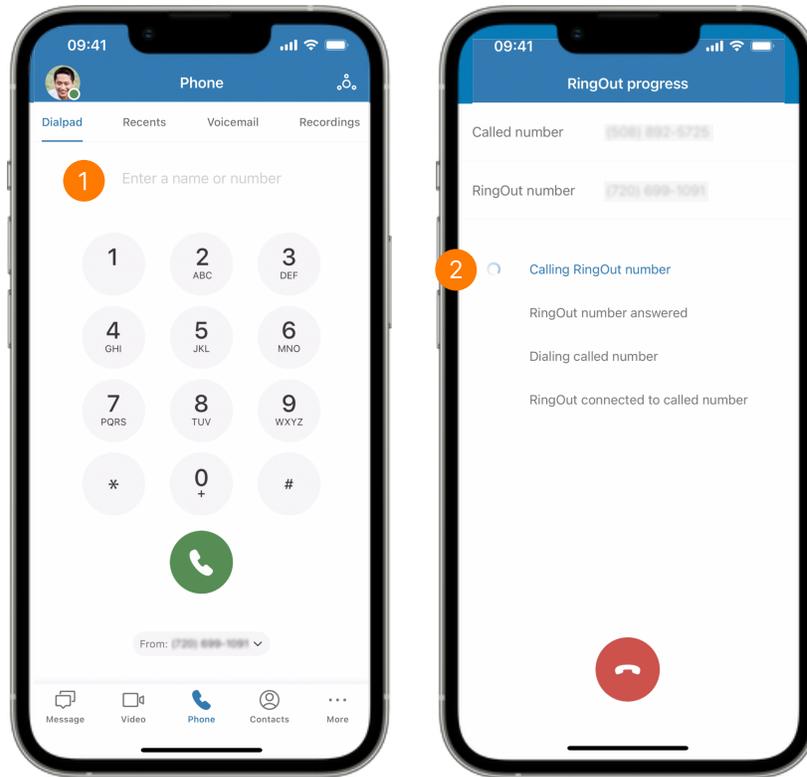
RingCentral App: Setting Your Phone Preferences

This quick guide explores some important settings to adjust for use with the calling feature of the RingCentral app.

Setting Your Phone Preferences

1. Click **Settings**.
2. Click ✆ **Phone**.
   a. Click the **Default caller ID** dropdown to select your preferred caller ID for outbound calls.
   b. Under "Default phone app for calling", select the **Use RingCentral (this app)** option.
   c. **Manage** your physical address under the Emergency response location section.
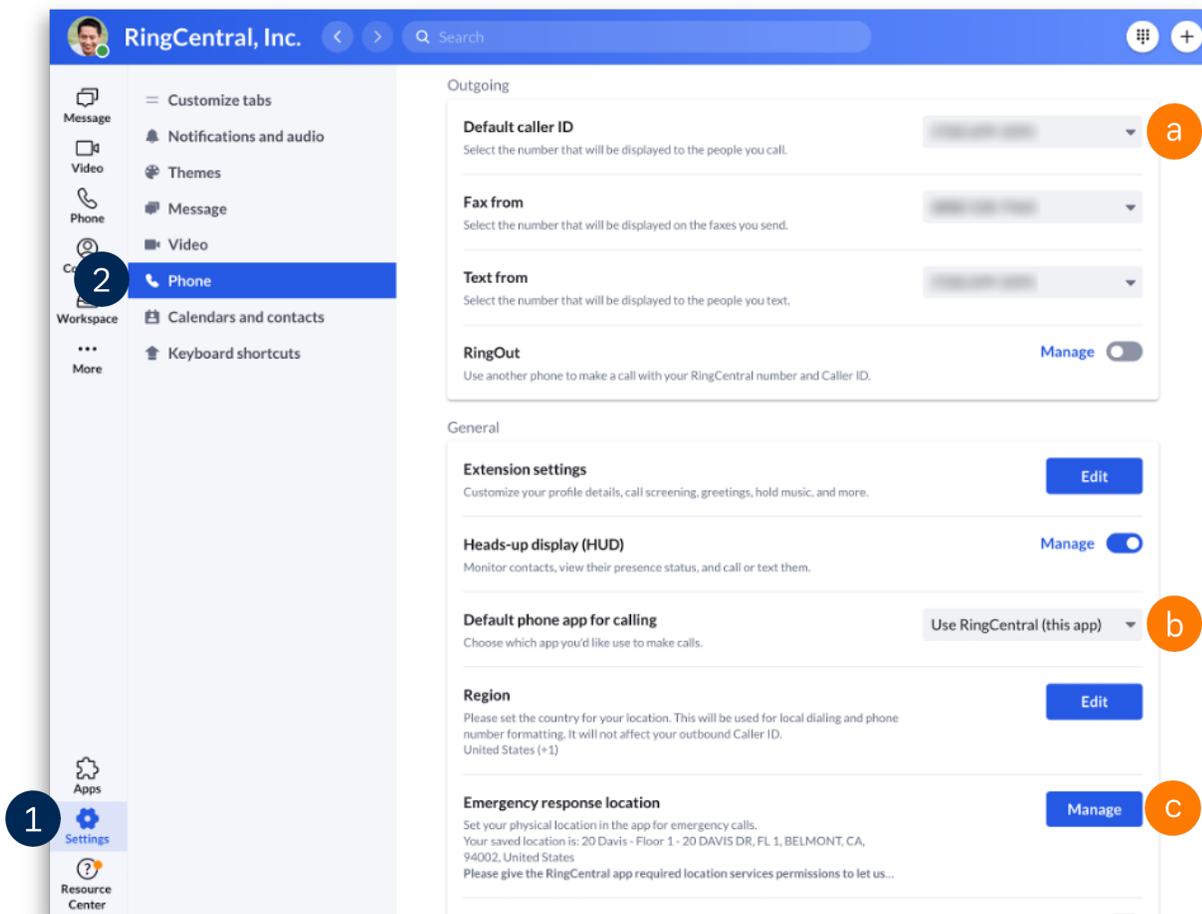
Updating Your Availability Status

Once you have updated the general settings, click your **profile picture** to set your availability status.

    a.   Select **Available** if you are available to take phone and video calls.

    b.   Select **Do not disturb** to block incoming calls. This also mutes chat notifications from direct messages and teams.

    c.   Selecting **Invisible** gives the impression that you are offline. You still receive messages and calls.

    d.   Your status automatically appears as **In a meeting** when on phone or video calls.
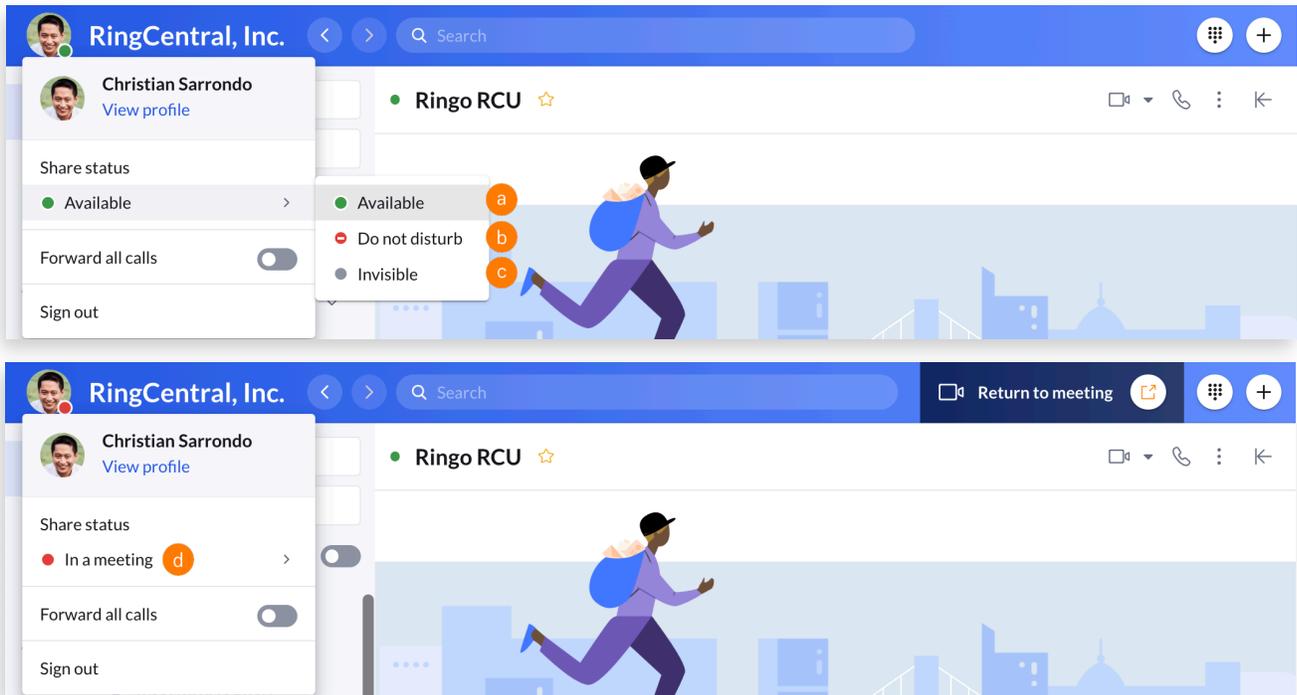
RingCentral App: Starting Audio Conference Calls

Conference calling is one of the key features within the RingCentral app. There are a few ways to start a conference call within the app, including the following:

1. Clicking **Start conference call** from the menu within a group or team conversation.
2. Converting a live call into a conference call via the dialpad.

Starting Conference Calls

You can start a conference call with all members of a team or group, while within the conversation.

1. Navigate to the **Message** section via the side menu bar.
2. Select a group or team conversation via the conversation list.
3. Click ⋮ **More**.
4. Click **Start conference** call.
5. Click **Start** in the popup window.
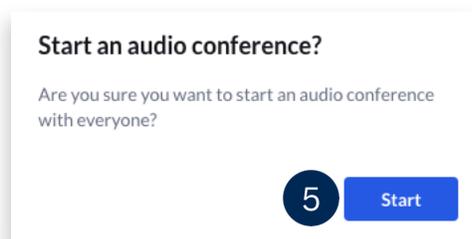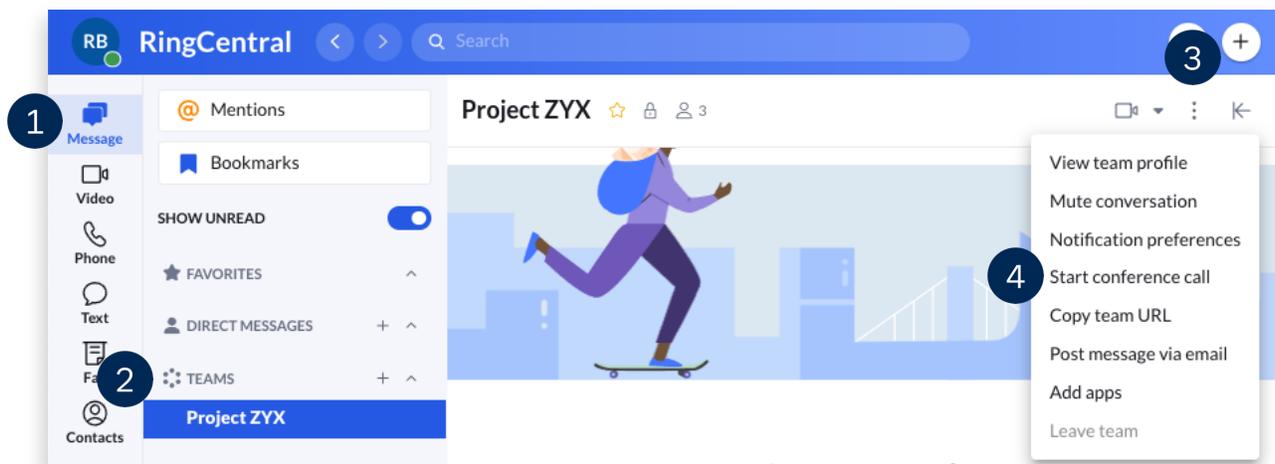
Joining Conference Calls

A message with options for joining the conference call appears when a conference call in a team or group starts.

    a.   **Dial-in number** – a regional or global number that members use to dial into the conference call.

    b.   **Host access** – the code the host (the person who starts the call) uses to dial into the conference call. Note that only the host can see the Host access code.

    c.   **Participant access** – the code the guests use to dial into the conference call. This is also used to identify which conference call they are joining.

    d.   **Join** — a button that appears in the group or team message that allows participants to instantly join the conference call.
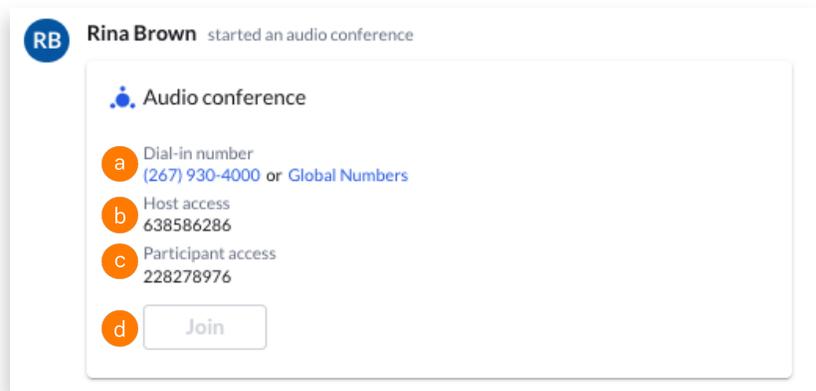
Converting Live Calls into Conference Calls

1. While on a call, click ⊕ **Add**.
2. Enter the name or number of the person to be added to the call.
3. Once the third person answers, click 🚶 **Merge to conference**.

Note: *You can repeat steps 1-3 to add up to nine more participants, for a total of ten including the host.*
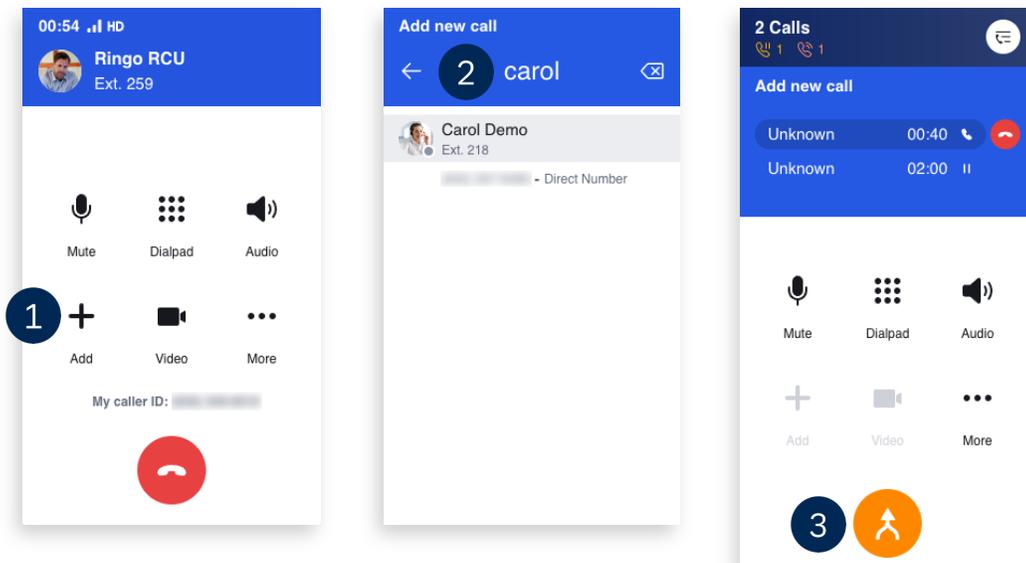
RingCentral Online Account: Forwarding Voicemail Messages to Email

You can configure your extension settings to forward your voicemail messages to your email through your RingCentral online account. Once set, you can access your voicemail messages from the RingCentral app and from your email with the voicemail attached.

1. Access your RingCentral online account.
2. Click **Settings**.
3. Select **Notifications**.
4. Expand **Messaging Notifications**.
5. Click the dropdown menu and select **Advanced Settings**.
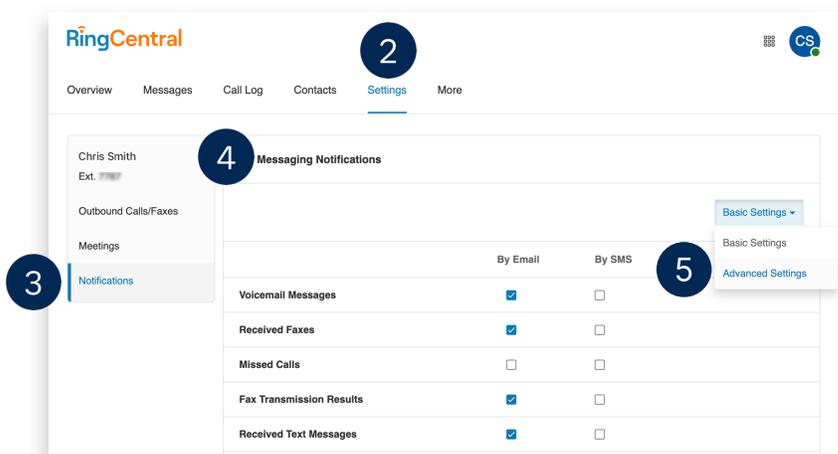
6. In the By Email column, check **Voicemail Messages**.
7. To ensure the notification includes an MP3 attachment, click **Customize Notifications**.
8. In the popup window, verify **Include attachment with email** is checked.
9. Type your preferred email address/es in the **Email** field. Separate multiple email addresses with semicolons.
10. Click **Done**.
11. Click **Save**.
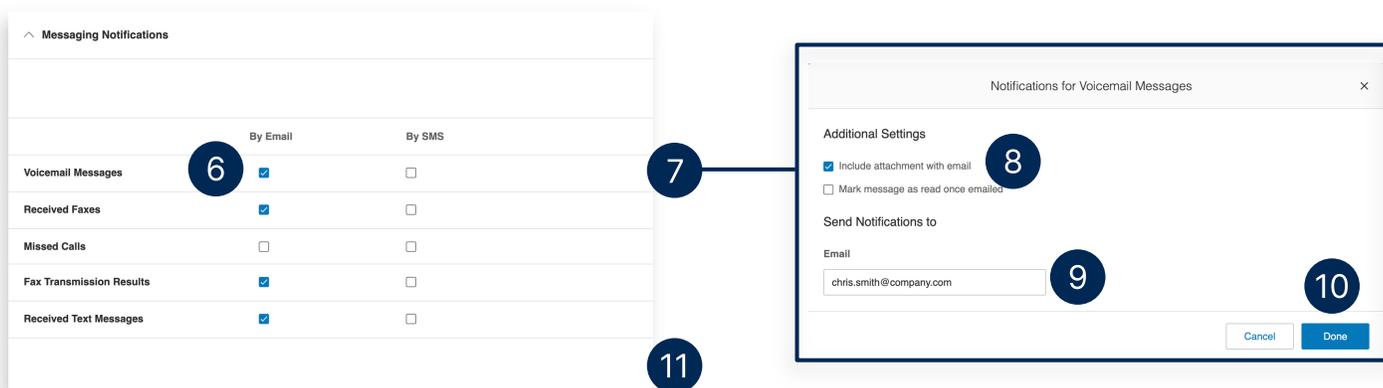
RingCentral App: Using Call Park

Call Park is a feature that allows RingCentral app users to send a call to a park extension, and have a different user pick up the call by dialing the system-generated extension.

Place a Call in a Public Park Location

During an active call, follow these steps to place the call in a public park location.

1. Click **More**.
2. Click **Park**. Then, take note of the park location extension that the system displays.

Note: *Call park location extensions are automatically generated, with ranges from *801 to *899.*
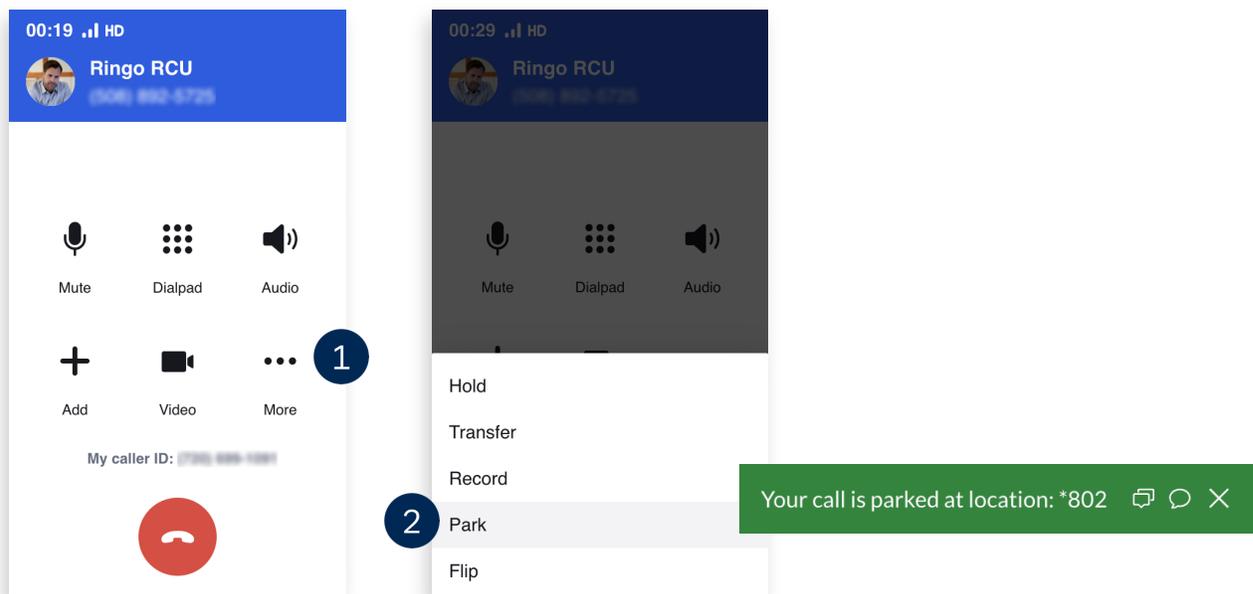
Retrieve a Call from a Public Park Location

Follow these steps to retrieve a call from a public park location:

1. Enter the appropriate park location extension of the call you want to retrieve using the dial pad.
2. Click the **Dial** button.
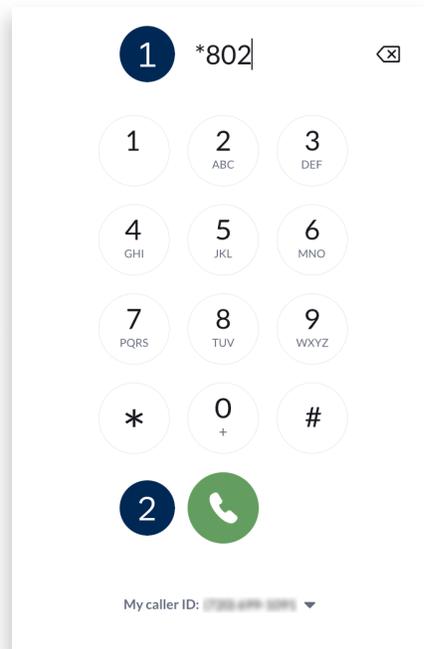
RingCentral App: Configuring Your Extension's Call Handling Settings

Users can configure where to receive incoming calls in the RingCentral app. Calls can be forwarded to multiple endpoints to be answered. You can choose to forward incoming calls to your desktop and mobile apps, deskphone, or a third-party phone number. Note that you may need permissions from your account administrator to edit Call Handling settings.

1. In the RingCentral app, click **Settings**.
2. Select **Phone**.
3. Click **Edit** next to Call handling. A popup window appears and shows your call handling settings.
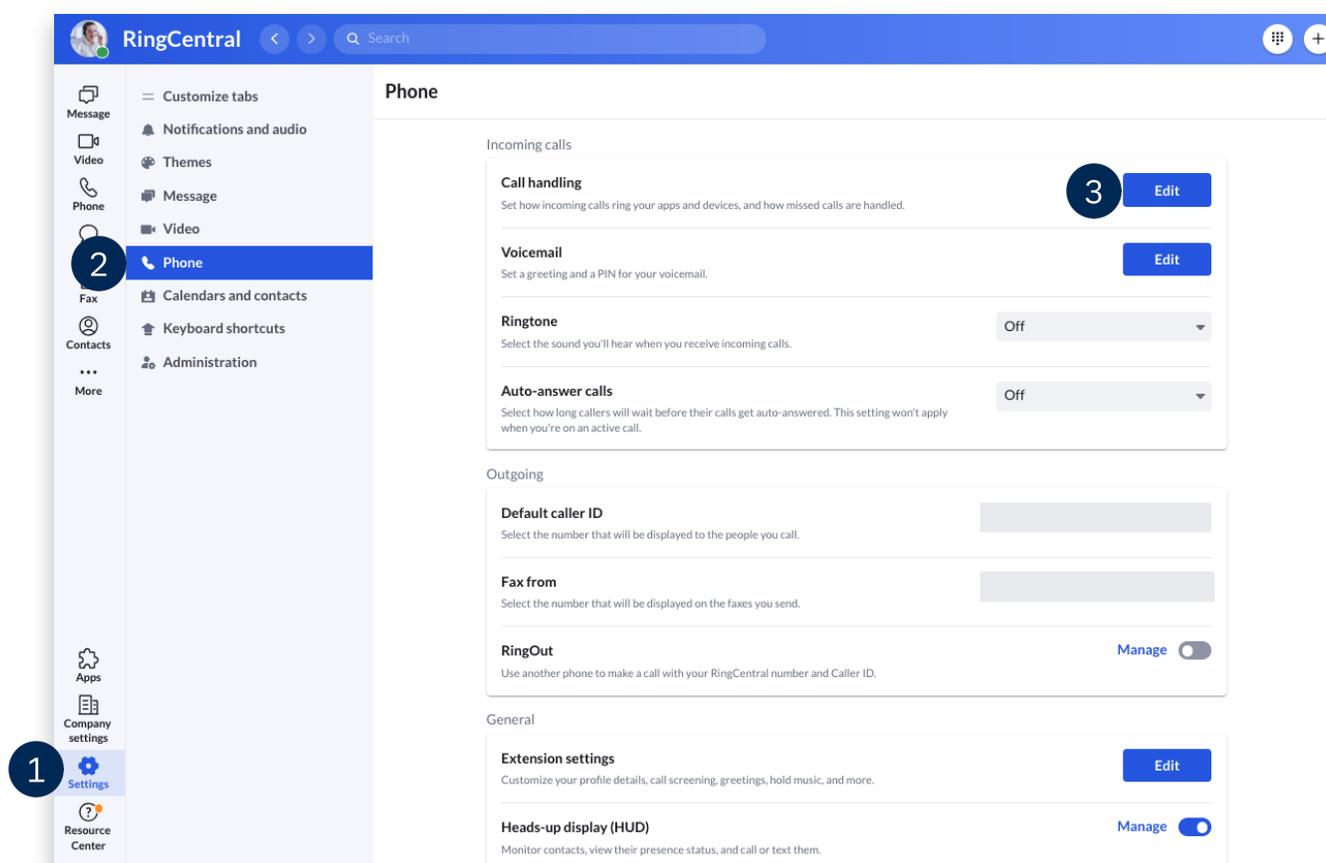
Forward All Calls

The Forward all calls feature allows you to forward all incoming calls when you are unable to answer. Note that enabling this feature overrides all your call handling settings for work and after hours.

1. Click the toggle for **Forward all calls**. A popup window appears.
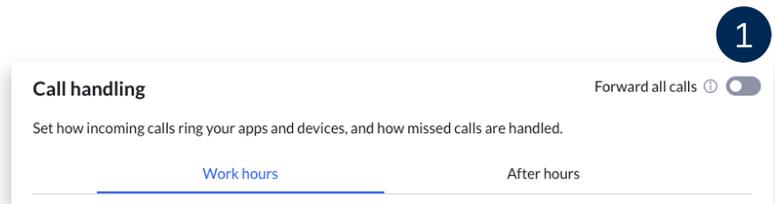
2. Click the dropdown to choose where you want to forward your calls.

3. Click **Show more options** to see the complete list.
    a. **Voicemail** – A greeting plays and forwards calls to your voicemail box. You can play and customize your voicemail greeting.
    b. **Contact or phone number** – Calls are sent to your chosen contact or phone number. Type a coworker's name, then select from the search results, or enter an external phone number.
    c. **Announcement** – A customizable announcement plays, then the call disconnects.
    d. **Call queue** – Calls are forwarded to a certain call queue group, where any available member can answer the call. Type a call queue name or extension in the search box, then select from the search results.
    e. **Shared line** – Calls are forwarded to a shared line and can be answered on any shared device. Type the name or extension of a shared line in the search box, then select from the search results.
    f. **IVR menu** – Calls are forwarded to an IVR menu. Type the IVR menu name or extension in the search box and select from the search results.
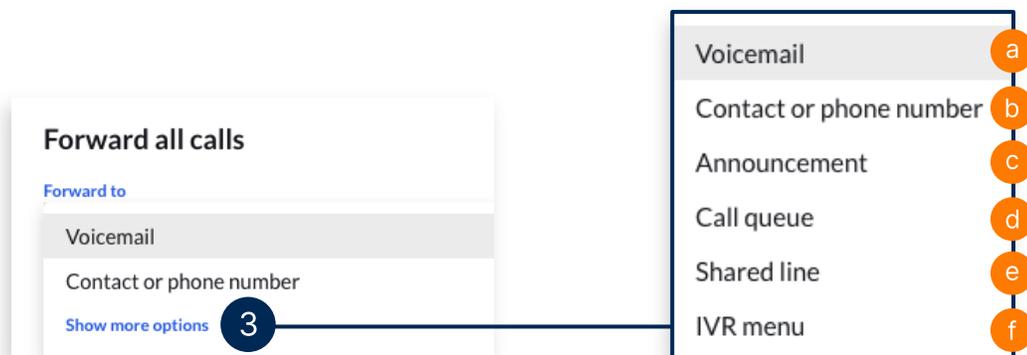
4. Optionally, you can check **Specify start and end dates** to set a duration when all your calls are forwarded.
5. Click **Save**.

Configuring Your Work Hours

Call handling rules can be set for both your work hours and after hours. You can modify your schedule to create separate rules for after hours. If your schedule is set to 24/7, all calls follow the rules you select under the Work hours tab.

1. To set your work hours, click **Edit schedule**.
2. Select **Specific work schedule** and update the time to reflect your working hours.
3. Click **Save**.

Configuring Your Call Handling Settings for Work and After Hours

Once your work hours are defined, you can set up separate call handling rules for your work and after hours.

1. Choose from the following call handling options for **Incoming calls**:
   - **Ring in order** – Calls ring the numbers and devices in the order they're listed. You can drag and drop from within the list to change the order.
   - **Ring all at once** – Incoming calls ring all numbers and devices simultaneously.
   - **Do not ring** – (Only available for After hours) Calls do not ring on your devices and follow call handling rules for Missed calls.
2. Click the **Ring for** dropdown to select how long you want each device to ring. You can choose **Always ring**, if you'd like your apps to continuously ring as your other devices are also ringing.
3. Select **Add number or coworker** to add a phone number or a contact in your organization.
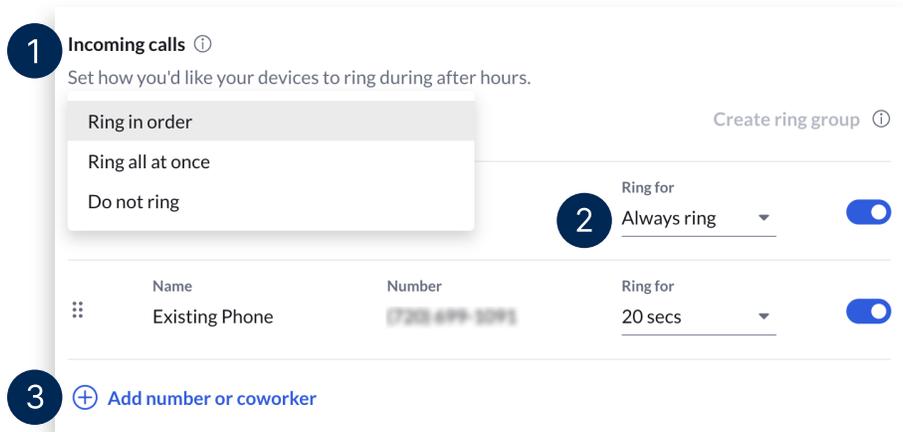
4. Hover over an item on the list and a checkbox appears. You can check multiple devices to create a **Ring Group**. This feature allows you to combine both aspects of Ring in order and Ring all at once options. Grouped devices follow the order they are listed and ring simultaneously.
   a. Click ⊕ **Ungroup** to remove the **Ring Group**.
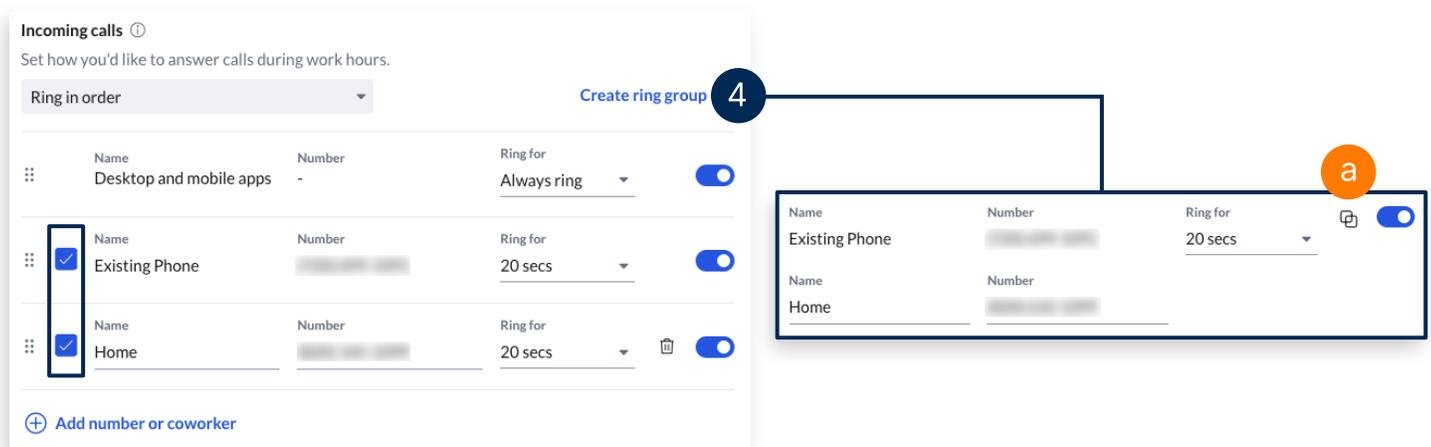
5. Under **Missed calls**, select from the following call handling options:
   - **Send to voicemail** – Sends calls to your or another extension's voicemail.
   - **Play an announcement** – Plays a customizable message and disconnects the call.
   - **Forward to extension** – Sends calls to a coworker, call queue, IVR menu, or an announcement-only or message-only extension.
   - **Forward to external number** – Sends calls to your preferred external number.
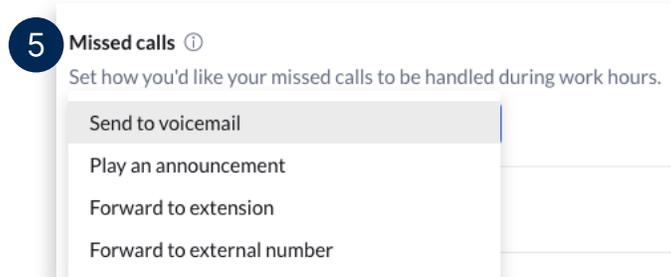
6. Once you finish configuring you call handling settings, click **Save**.
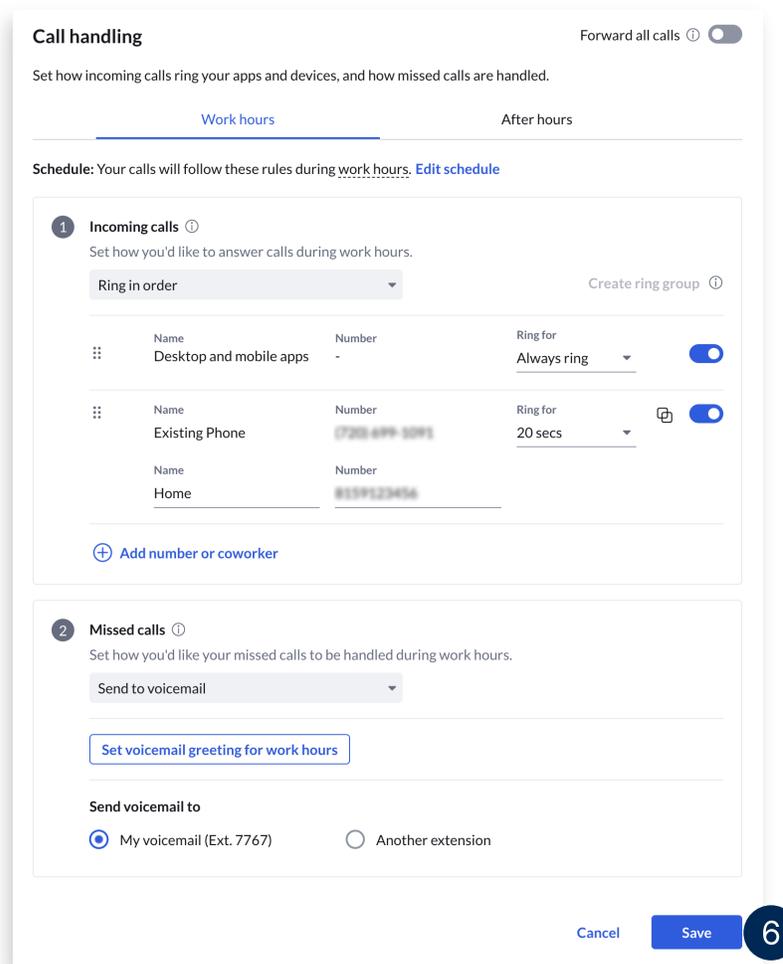
RingCentral App: Setting Up Custom Answering Rules for Your Extension

Custom Answering Rules allow you to set specific call handling actions based on your defined conditions. This saves you time and effort in reconfiguring the standard call handling settings to meet specific conditions.

Example: Forward your incoming calls directly to your voicemail during lunch breaks or holidays.

Note: *You may need additional permissions from your account's administrator to configure your Custom Answering Rules. Custom Answering Rules are applied before your standard Work Hours and After Hours call handling rules.*

1. In the RingCentral app, click **Settings.**
2. Select **Phone**.
3. Under General, click **Edit** beside Extension settings. A browser window opens to access your settings.

4. Click **Call Handling**.
5. Select **Custom rules**.
   a. Note that if enabled, **Forward all calls** overrides all Call Handling rules, including custom answering rules. To ensure that your set rules are applied, turn this option off.
6. Click **Add rule**.
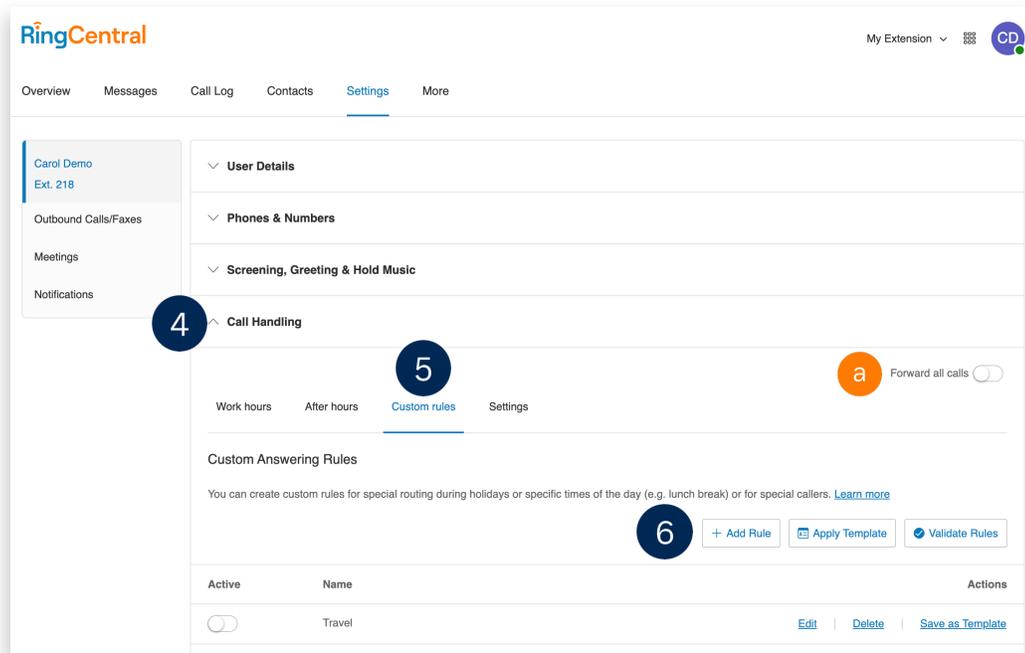
7. In the popup window, configure your Custom Answering Rule details, starting with the rule name.
8. Click **Next**.

9. Select your preferred condition/s for your Custom Answering Rule. You can select multiple conditions simultaneously.
   a. **Caller ID** – Configures call handling behavior based on the incoming caller ID. You can specify complete or partial numbers, such as country codes or area codes.
   b. **Called Number** – Configures call handling behavior based on the phone number that the caller dialed.
   c. **Date and/or Time** – Configures call handling behavior based on date or time ranges.
10. Click **Next**.
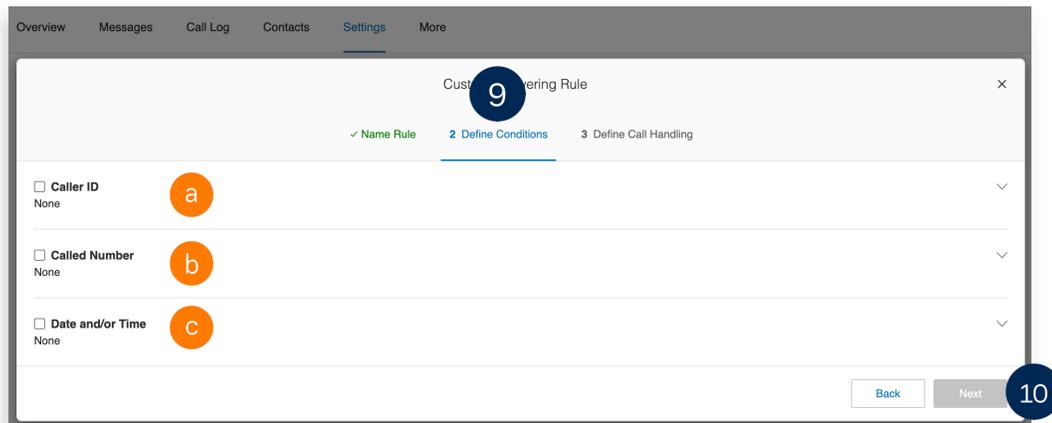
11. Select the action that should apply when an incoming call matches the conditions you selected.
    a. **Ring my devices** – Rings the numbers and devices associated with your RingCentral account.
    b. **Send to voicemail** – Send callers directly to voicemail. Choose between the voicemail of the current extension or a different extension.
    c. **Play an announcement** – Choose to play the default unavailable greeting or record a custom greeting. The call disconnects after the announcement.
    d. **Forward to extension** – Forwards the call to the selected extension.
    e. **Forward to external number** – Forwards the call to the specified phone number.
12. Click **Save**.
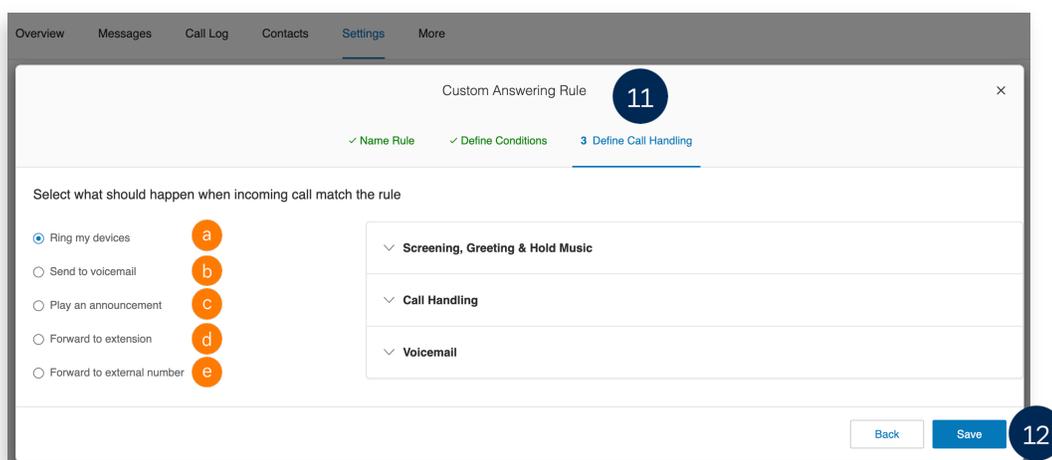
After completing this process, your Custom Answering Rule displays in the **Custom rules** tab. You may edit, delete, or save the rule as a template.

Quick Tip: *Click* ***Validate Rules*** *to check if your Custom Answering Rules overlap or conflict with another rule. For Custom Rules with conflicts, you may edit, delete, or temporarily disable any conflicting rules.*

⌃ **Call Handling**

Forward all calls ◯

Work hours   After hours   Custom rules   Settings

Custom Answering Rules

You can create custom rules for special routing during holidays or specific times of the day (e.g. lunch break) or for special callers. Learn more

＋ Add Rule   ✓ Validate Rules

Active	Name	Actions
🔵	My Rule 1	Edit | Delete
◯	PTO	Edit | Delete

FAX

RingCentral App: Sending Faxes

Stay organized and eliminate the need to print out documents to send faxes. This quick guide shows you how to set up, customize, and conveniently send faxes using the RingCentral app.

Send a Fax

During an active video meeting on your computer, follow these steps to switch to your smartphone:

1. Click **New Actions**.
   Note: *Users can also click the **Phone Fax Text** tab then **New fax**.*
2. Click **Send new fax**.
3. Enter the recipient's contact name or fax number.
4. Select your preferred **Cover page**, you can choose **None**, if you don't want to include a cover page.
5. Include a **Cover page note** (optional).
6. Attach the document you want to fax.
   Note: *The file should not exceed the 50 MB limit.*
7. Click **Send now**.
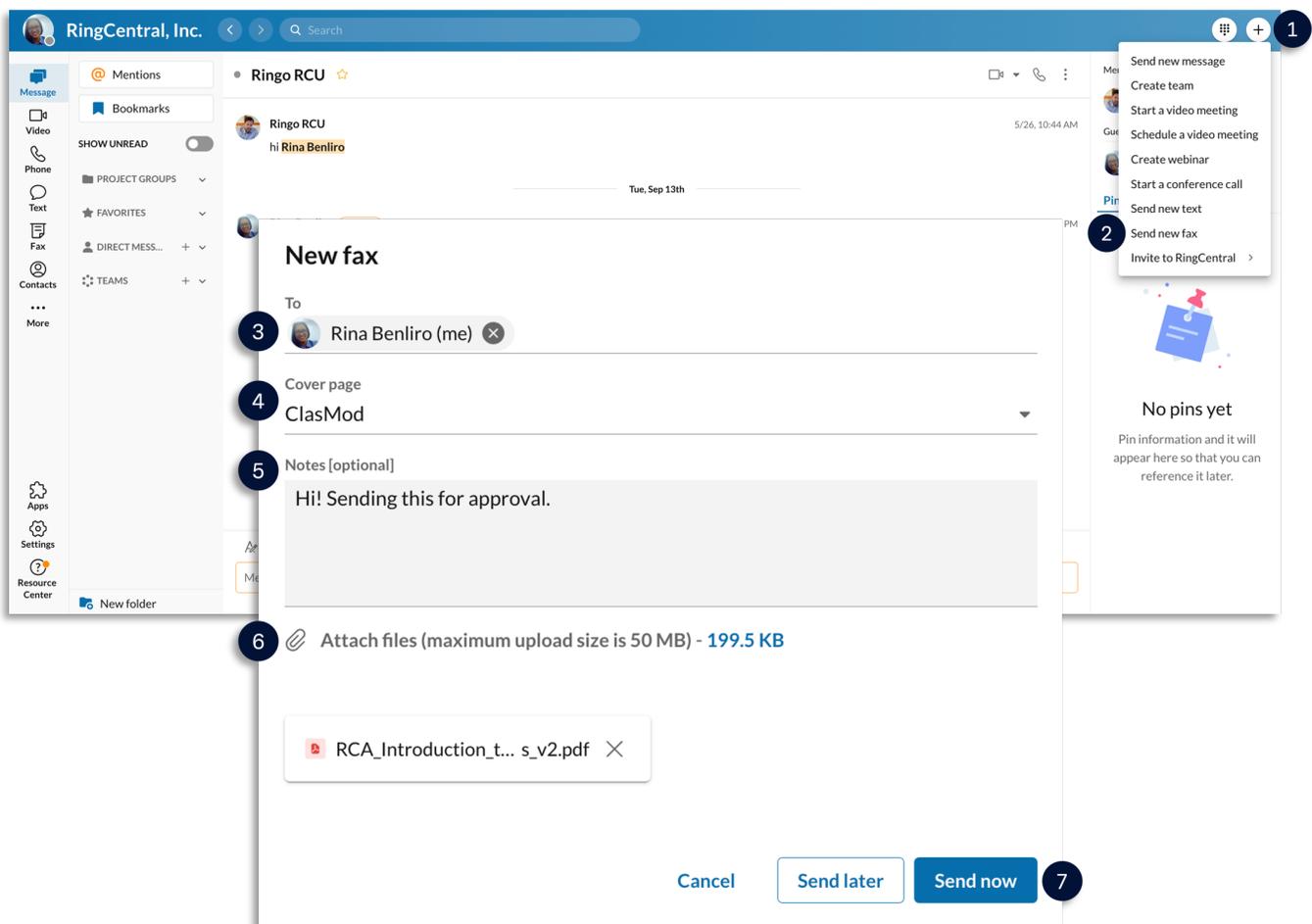
Schedule a Fax

The RingCentral app allows you to schedule when you want your fax to be sent. After you have entered the recipient details and attached the file you want to fax, follow the steps below to schedule a fax.

1. Click **Send later**.
2. Select a **Due date**.
3. Select a **Due time**.
4. Click **Schedule.**

New fax

To

Rina Benliro (me) ✕

Cover page

ClasMod ▾

Notes [optional]

Hi! Sending this for approval.

📎 **Attach files (maximum upload size is 50 MB) - 199.5 KB**

📄 RCA_Introduction_t... s_v2.pdf ✕

1

Cancel   Send later   Send now

Pick date and time

2 Due date
09/23/2022 📅

3 Due time
12:00 PM 🕐

Cancel   Schedule   **4**

RingCentral App: Receiving Faxes

When someone sends you a fax, it appears in the Received page under the Fax section on the Phone menu. Received faxes appear as unread until you navigate to the Received page to view the fax.

Your received faxes can also be accessed in your RingCentral Online Account (https://service.ringcentral.com) or your email inbox, if you have the extension configured.

To view your received faxes, follow these steps:

1. Click **Fax**.
2. Select **Received**.
3. Hover your mouse over your preferred fax message to display a series of icons you can select to perform:
   A. **Add Contact**: Allows you to add an unknown number or contact.
   B. **View**: Preview of the fax.
   C. **Download**: Downloads the fax message to your local storage.
   D. **Forward**: Allows you to forward the fax to another contact. This opens the **New fax** window, where you can select your preferred options before forwarding the fax.
   E. Select the **More** button to reveal a list of additional options.
      i. **Mark as unread**: Marks the fax message as unread.
      ii. **Block number**: Blocks the phone number of the person who sent the fax.
   iii. **Delete**: Deletes the fax.
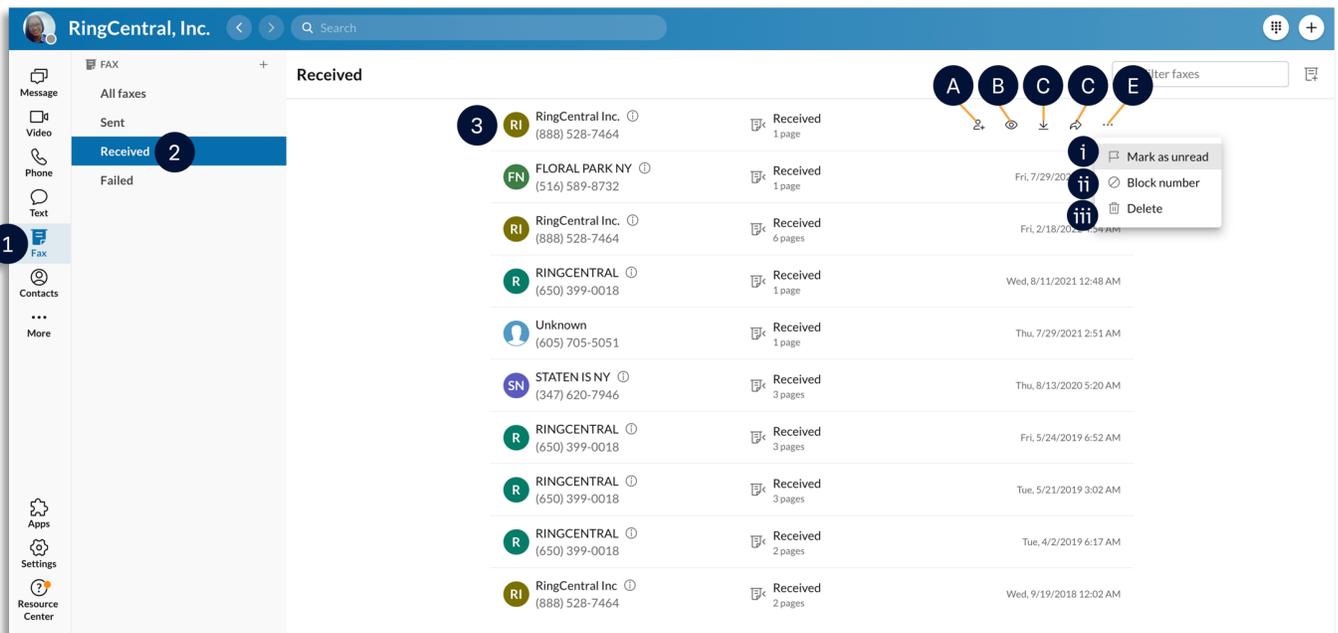
RingCentral App: Handling Failed Faxes

A fax transmission Failed status indicates that the fax failed to send. Follow the steps below to access the failed faxes menu.

1. Click the **Fax** tab.
2. Click **Failed**.
3. Hover your mouse over the ⓘ icon to see the reason for the failed fax transmission.

When you hover your mouse over a failed fax, a series of icons appear, which you can select to perform one of the following actions:

A. **Add contact** – Add the recipient to your contact list.
B. **Resend** – Resend the fax.
C. **Delete** – Delete the fax.
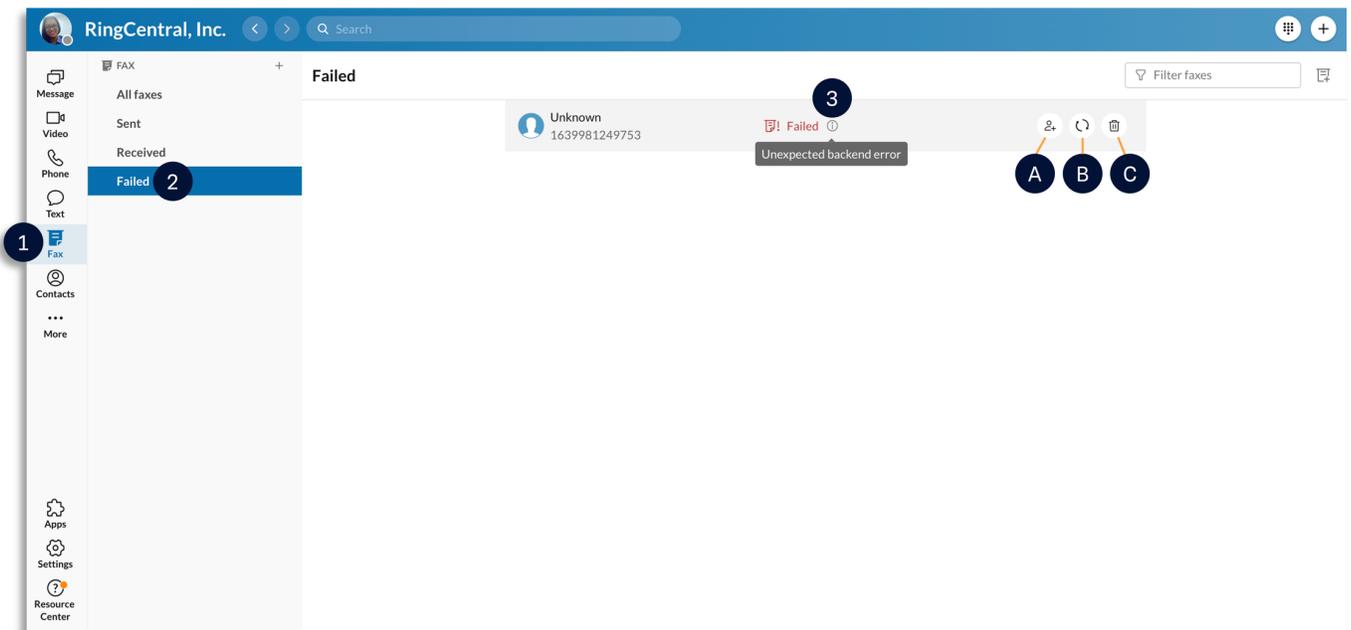
Factors Affecting Fax Transmission

Fax transmission can be affected by the following factors:

Recipient's Contact Name and Fax Number
A valid contact name or fax number is needed for a successful fax transmission.

Supported Files

- Ensure that the file name of the attached files does not include ampersands or other special characters, such as: **@ # $ % ^ & ***.
- Ensure the attachment does not exceed **200 pages**.
- Ensure the file size does not exceed **50 MB**.
- Verify the file type is any of the following:
    - Adobe Acrobat /Adobe Reader (pdf)
    - Adobe Photoshop (psd)
    - Microsoft Word (doc, docx, docm)
    - Microsoft Word Document Template (dot)
    - Microsoft Word for Mac (mcw)
    - Microsoft Excel (xls, xlsx, xlsb, xlsm)
    - Microsoft PowerPoint (ppt, pptx, pptm)
    - Microsoft Visio (vsd, vdx)
    - Microsoft Publisher (pub)
    - Microsoft Works (wps)
    - Microsoft Windows Write (wri)
    - Microsoft Fax (awd)
    - Generic Graphics Format (tif, tiff, gif, jpg, jpeg, bmp, png, pcx, tga)
    - Rich Text Format (rtf)
    - Text Files (txt, log, h, cpp, c, err, hpp)
    - Lotus 1-2-3 (wk1, wk3, wk4)
    - Quattro Pro DOS (wq1)
    - Extensible Markup Language (xml)
    - Hypertext Markup Language (html, htm)
    - Comma Separated Values (csv)

Note: *Macro-enabled files that require a macro to execute or open are not supported.*

Document Size and Quality
Documents with large amounts of text or complex images are digitally processed longer than a simple one, delaying the fax.

Note: *Documents containing mostly text take approximately one minute per page of transmission time, and documents with many graphics and scanned pages take longer.*

Quality of Connection
Noise on the telephone line or poor connection on the recipient's end may slow down fax transmission.

Connection Speed
Old fax machines or network connection problems may cause transmission speed to drop to **9600bps** orless, which can cause delays or failures in receiving faxes from RingCentral.

TEXT

# RingCentral App: Sending Text Messages

The RingCentral app lets you send individual and group text messages to anyone, so you can communicate with people who don't have the RingCentral app installed.

Viewing Text Messages

1. Select the **Phone** tab.
2. You can find the list of your sent or received text messages under the **TEXT** section.
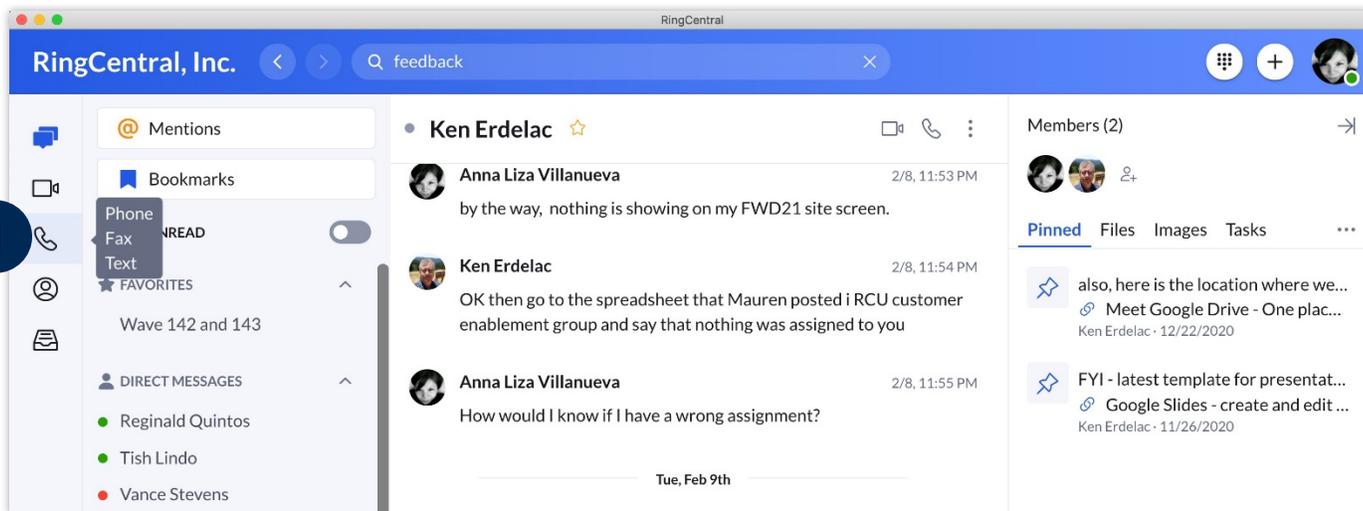
3. Click any of the contacts to view the message thread.
4. Type your message in the message field.
5. Press Enter/Return to send the message.
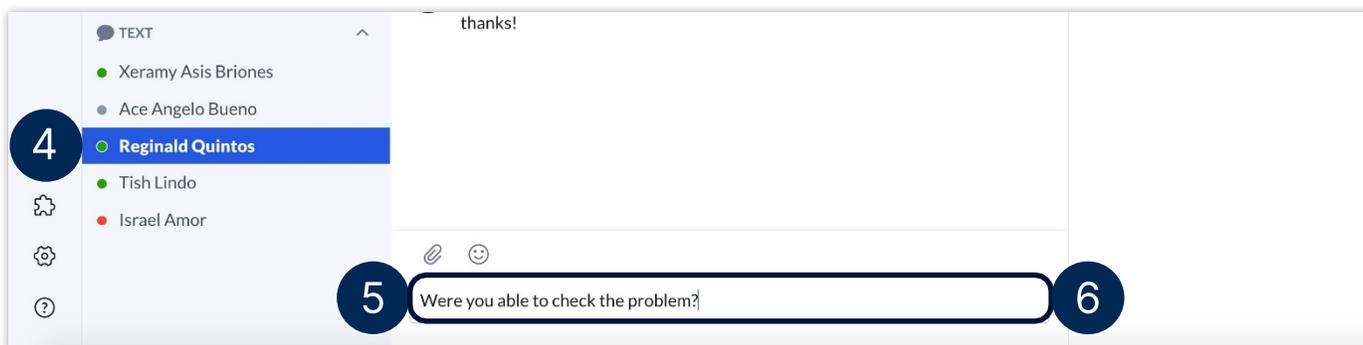
Sending a Text Message

There are two ways you can send a text message in the RingCentral app:

- Send a text message via the **Send new text** button in the Phone menu.
- Send a text message via the **New actions** button at the top right.

One way you can send a text message is via the **Send new text** quick creation button found in the **Phone** menu. To send a new text message using this method, follow these steps:

1. Click **Send new text**.
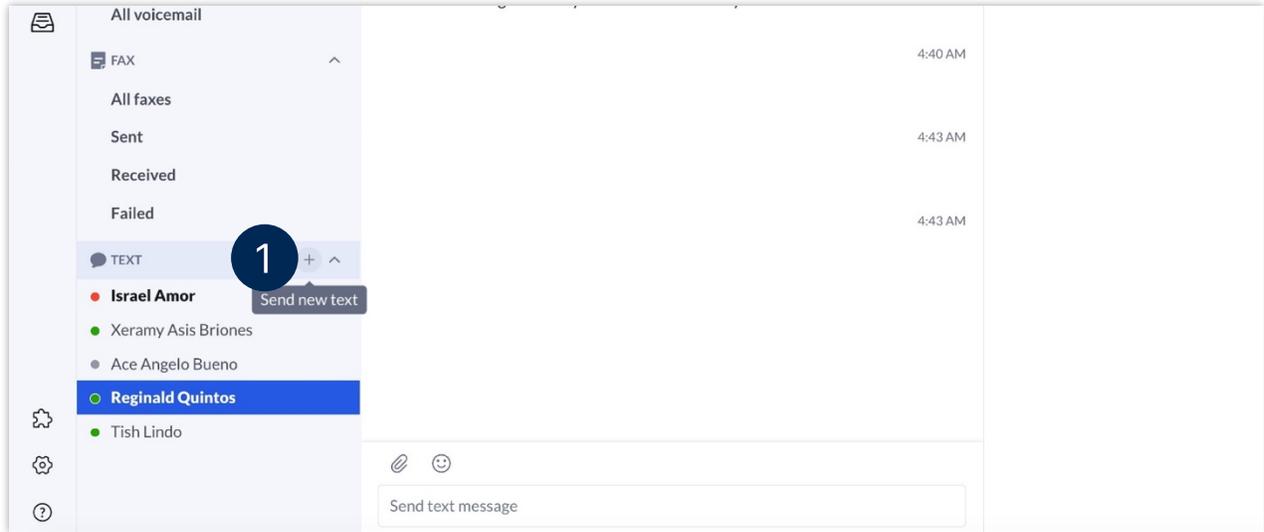
2. If there are several SMS-enabled phone numbers assigned to your extension, choose theappropriate one in the **Text from** field.
3. Type the name or phone numbers of your preferred message recipients in the **To** field.
   Note: *You can just type their names, if they are part of your organization.*
4. Tick the **Create group text** option to send a group text message.
   Note: *Uncheck this option to send the text message to each contact individually. You can send agroup text to a maximum of 10 people.*
5. Click **Next**.
6. Type your message in the message field.
7. Press **Enter/Return** to send the message.

Another way of sending a text message is via the **New Actions** button. To do this, follow these steps:

1. Click the **New Actions** plus button at the top right.
2. Select **Send new text from** the drop-down menu.

Note: *Repeat the same steps detailed above to complete this process.*
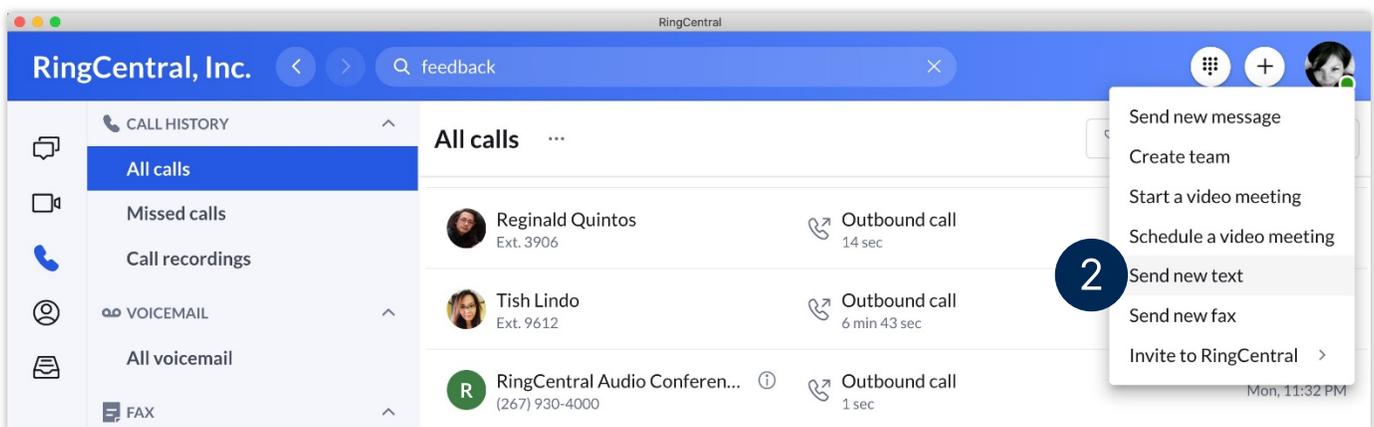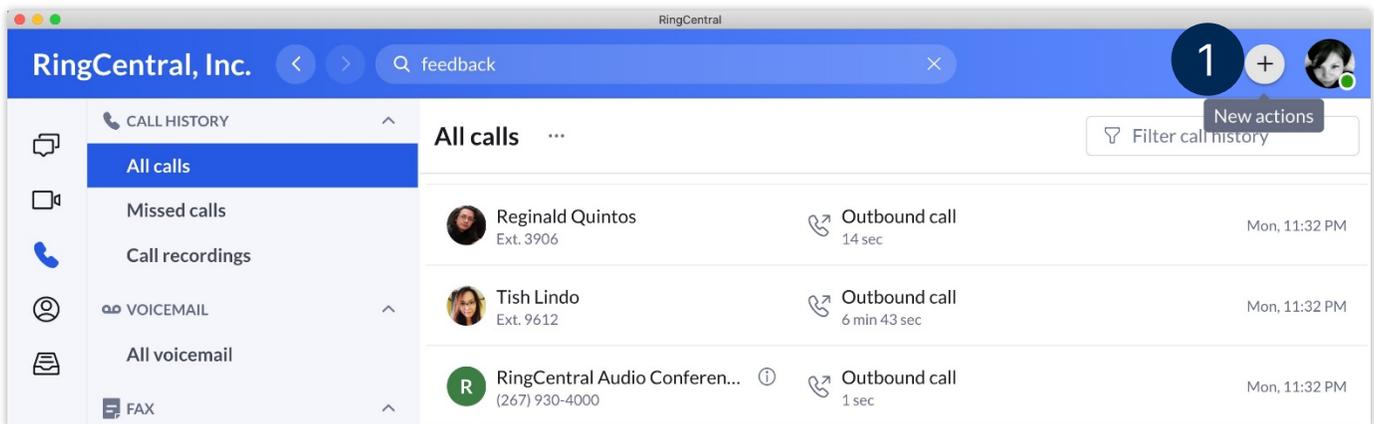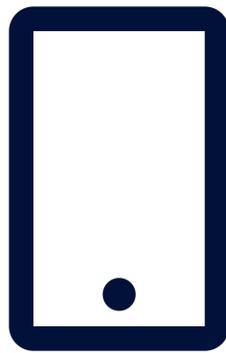
MOBILE

RingCentral App for iOS: Mobile Basics

RingCentral app for mobile provides a feature-rich user experience. It keeps you connected anytime, anywhere. It allows you to always be on top of the conversation and be productive even when you're on-the-go.

Message

Message shows all messages from individuals, groups, or teams.
1. **All** shows all active conversations.
2. **Direct** filters messages from individuals and groups.
3. **Teams** shows messages from teams you created or are a member.
4. **Favorites** shows conversations tagged as favorite.
5. To add an individual or a team to your favorites, swipe left on a conversation and tap ☆ **Favorite**.
6. Tap the 🔍 **Search** icon to look up a message or a contact.
7. Tap the ⊕ **Plus** icon to create new messages or teams.
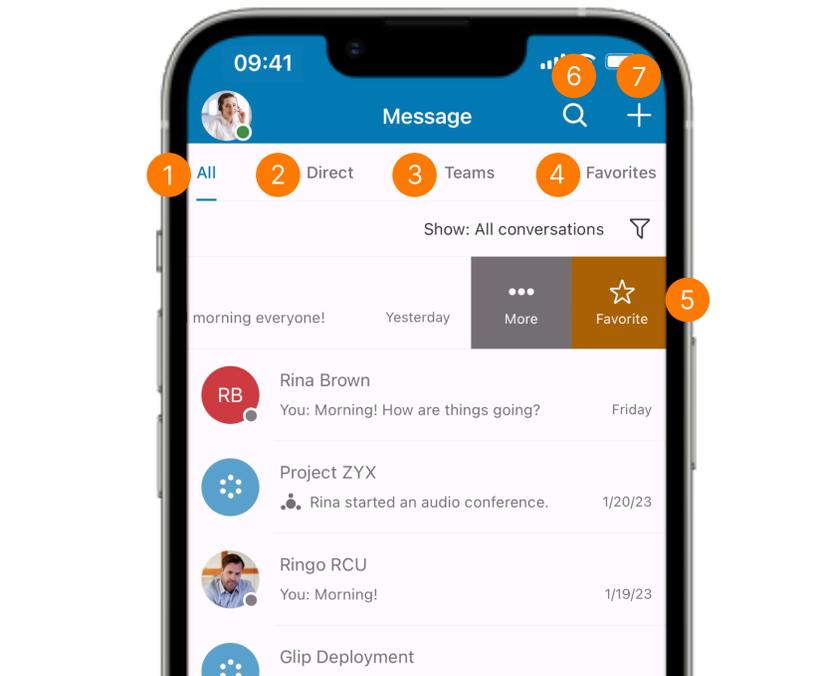
Message Tips

1. Swipe left on a conversation and tap
   ⚫ **More**.
2. The following options appear:
   a. **Call** — call the contact.
   b. **Mute conversation** — disable notifications
      from the
      conversation.
   c. **Close** — hide the contact from the
   active messages list.
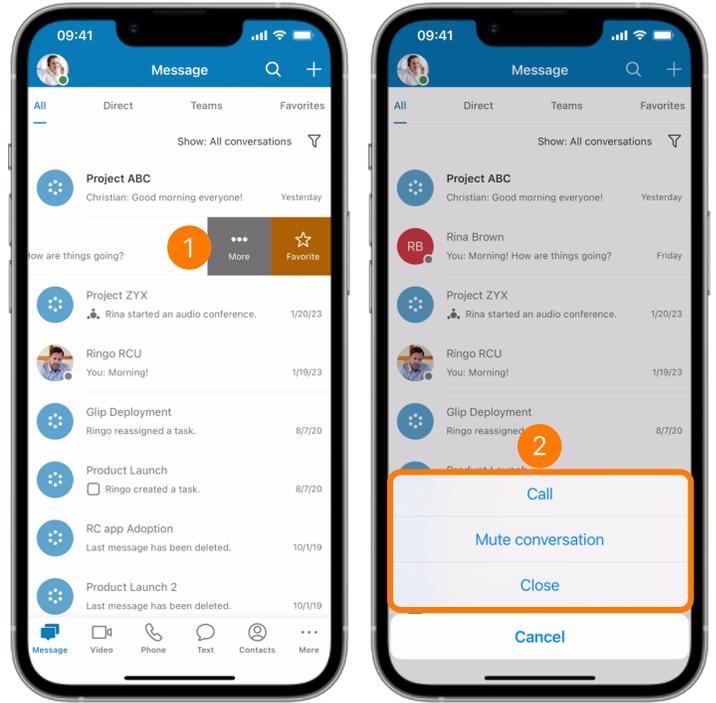
3. When in a conversation, tap the ⚫ **More**
   icon to see the following:
   a. Shared files
   b. Pinned messages
   c. List of tasks
   d. Scheduled events
   e. Shared notes
   f. Shared links

4. Tap on a message you sent.
    The following options appear:
    a. Quote message
    b. Forward message
    c. Edit message

5. Tap the ⋯ **More** icon to show
    more options:
    a. Copy
    b. Mark unread from here
    c. Bookmark
    d. Pin for everyone
   e. Reaction
    f. Delete message
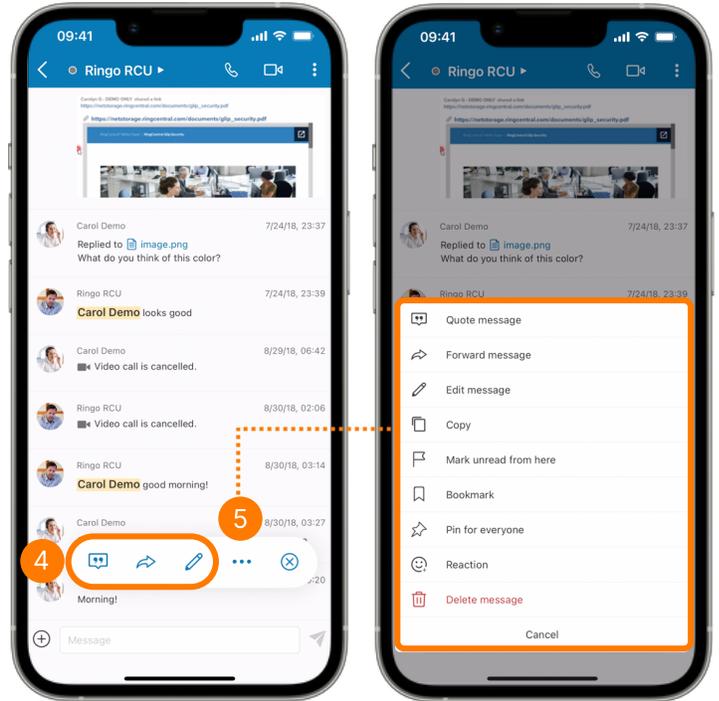
6. Tap on a received message to display the
    following options:
    a. Reaction
    b. Quote Message
    c. Forward message

7. Tap the ⋯ **More** icon to show more options:
    a. Copy
    b. Mark unread from here
   c. Bookmark
    d. Pin for everyone
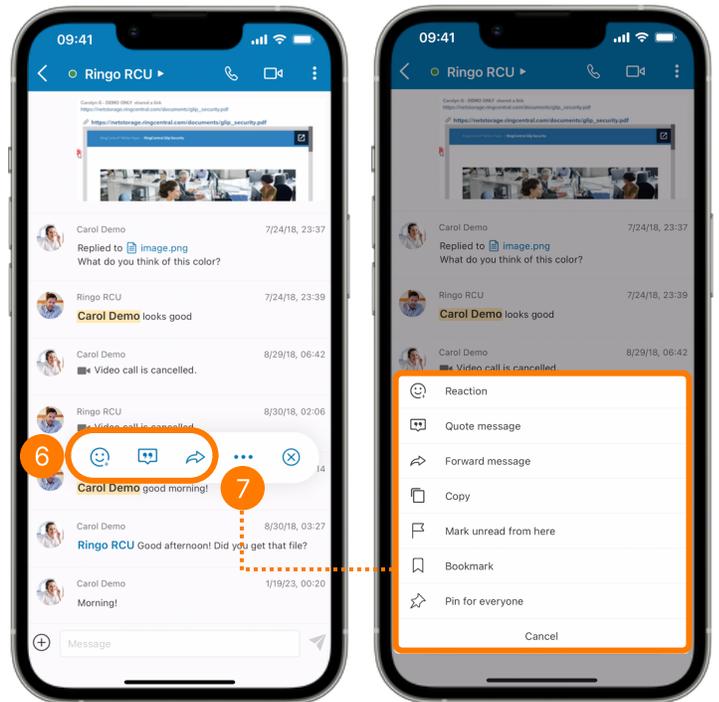
Video

Start, join, and schedule a meeting under the Video tab.

1. **Start** instantly connects you to a meeting.
2. **Schedule** allows you to set up a meeting.
3. Tap **Join** and enter a meeting ID or link to connect to a meeting.
4. Tap the ⋮ **More** icon to view additional options, including recordings and video meeting settings.
5. Connect your Microsoft, Exchange, Google, or device calendar to your RingCentral account.
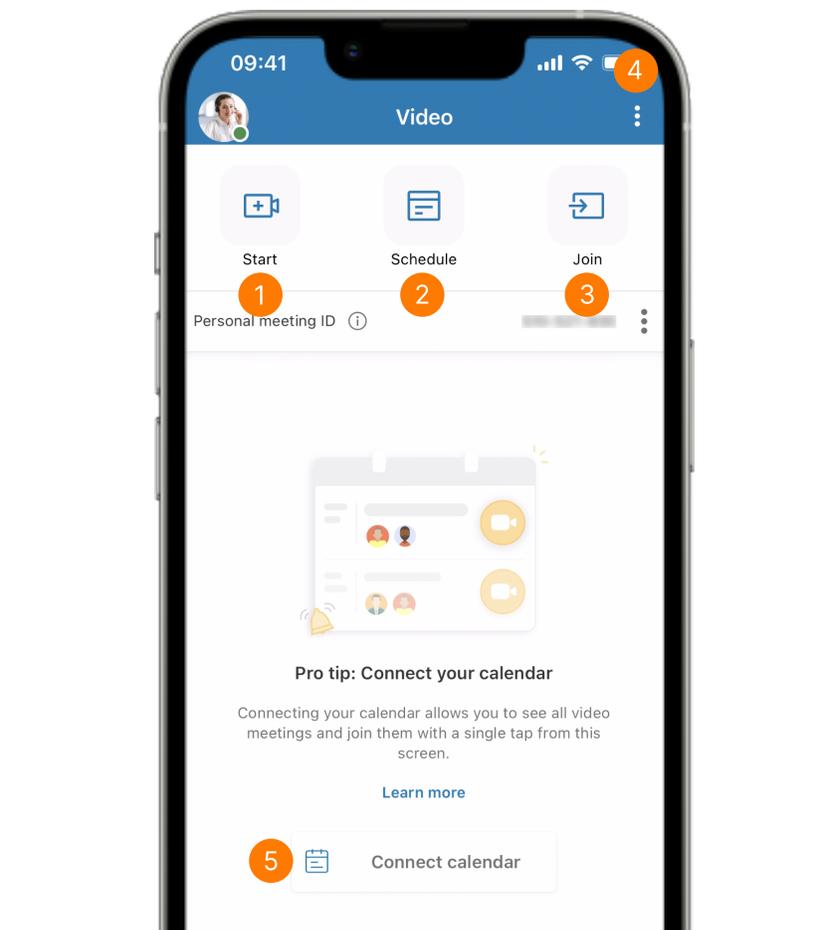
Video – Scheduling a Meeting

1. To schedule a video meeting, tap **Schedule**.
2. Set the meeting options as necessary.
3. Tap **Next**.
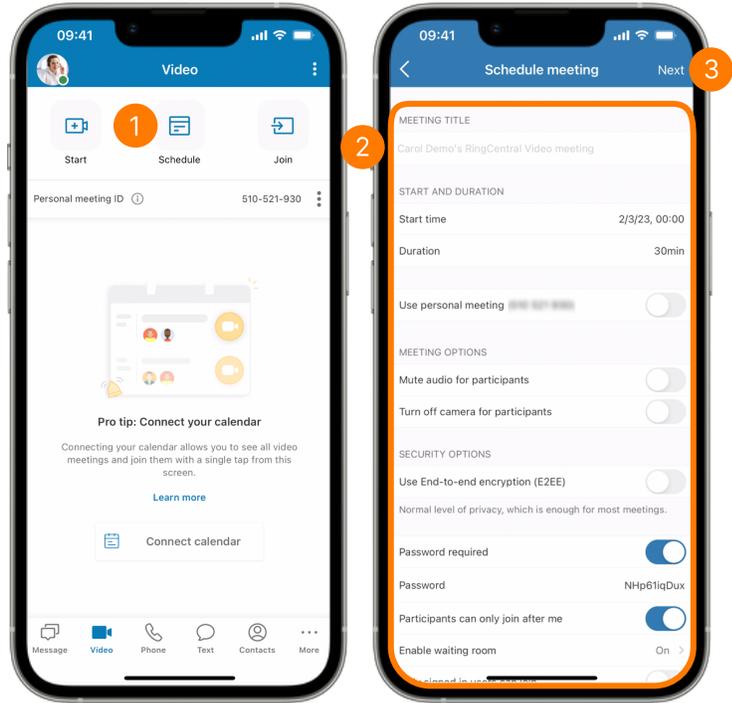
4. To share the meeting details via your device's sharing options, such as email and other apps, tap **Share invite**.
5. To share the invite through Message, tap anywhere to close the popup message, then tap the ⋮ **More** button next to the meeting information.
6. Tap **Send invite**; then, select **Invite via message**.
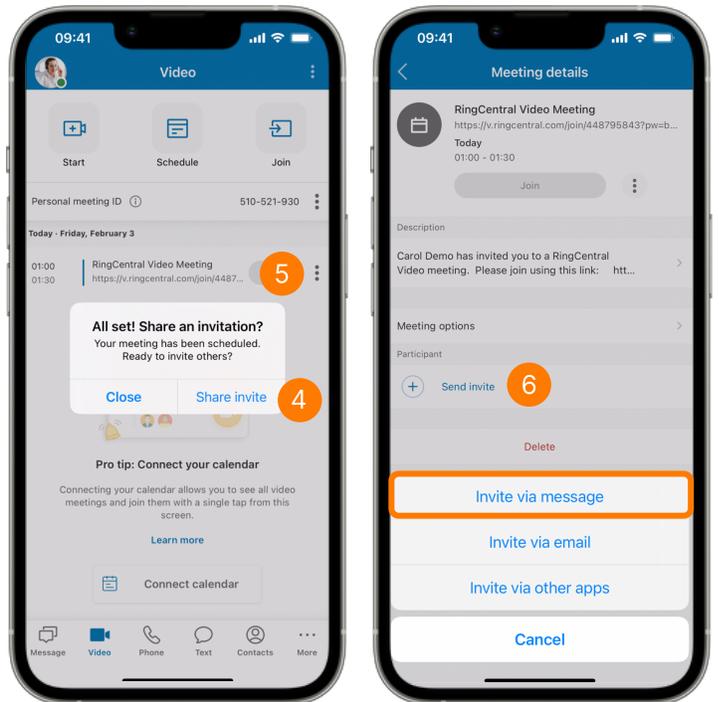
Video – Joining a Meeting

1. To join a scheduled meeting, tap **Join** next to the meeting details.
2. To join a meeting using a link or the meeting ID, use the **Join** button.
3. Add the meeting ID or meeting link and tap **Join**.
4. Choose how you want to join audio.
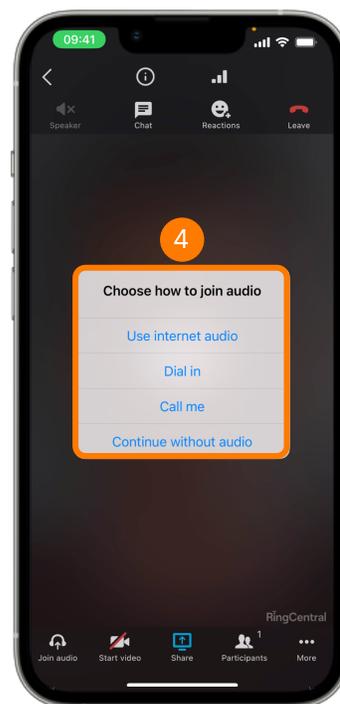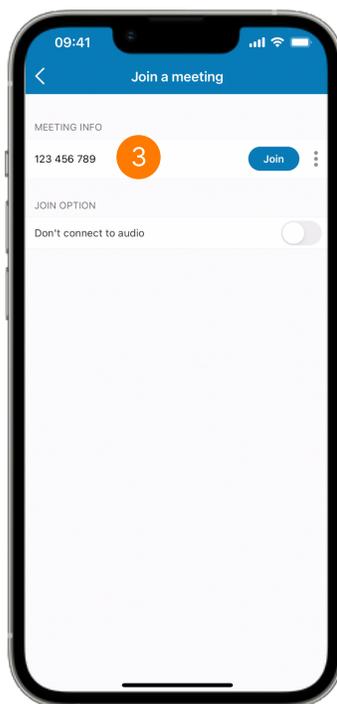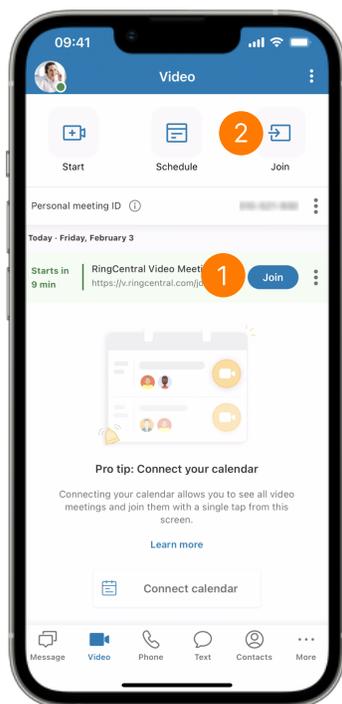
Video Tips

1. RingCentral users are assigned a **Personal meeting ID** that lets them have their own virtual room that people can join at any time.
2. Tap the ⋮ **More** button beside the system-generated Personal meeting ID to see the following options:
   a. Start meeting
   b. Dial in
   c. Share meeting link
   d. Settings
3. Select **Settings** to configure your Personal meeting ID.
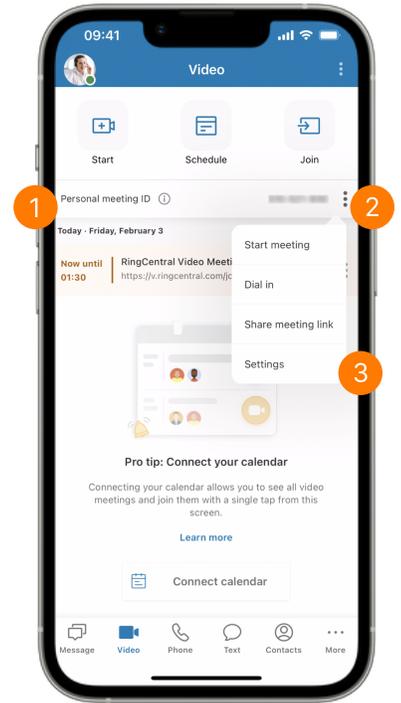
4. Under **PERSONAL MEETING OPTIONS**, you can modify your meeting ID or name to your liking, making it easy to remember.
5. Select if you want to mute the audio or turn off the camera for your participants when they join your virtual room.
6. Configure your meeting security options as you see fit. It is recommended to set a password or enable the waiting room to keep your room secure.
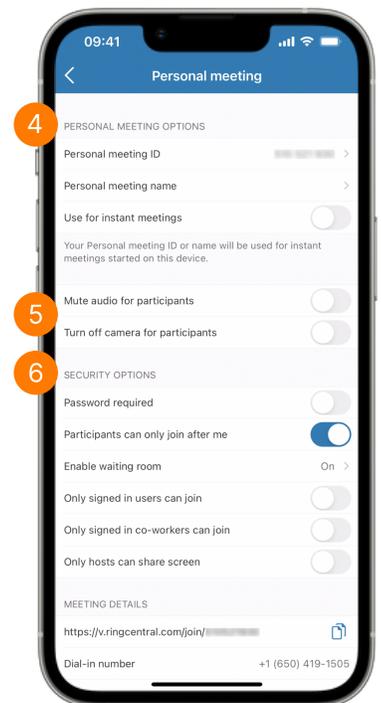
Phone

Access your call log, voicemail, and start conference calls in the Phone tab.

1. **Dialpad** allows for manual dialing of numbers or searching for contacts.
2. The **Recents** tab shows your call log.
3. **Voicemail** shows all voicemail messages.
4. Access all your call recordings in the **Recordings** tab.
5. Schedule or start a conference call using the ⊙ **Conferencing** button.
6. Tap the **From** dropdown menu to select the caller ID you want to use for an outgoing call, then dial the number.
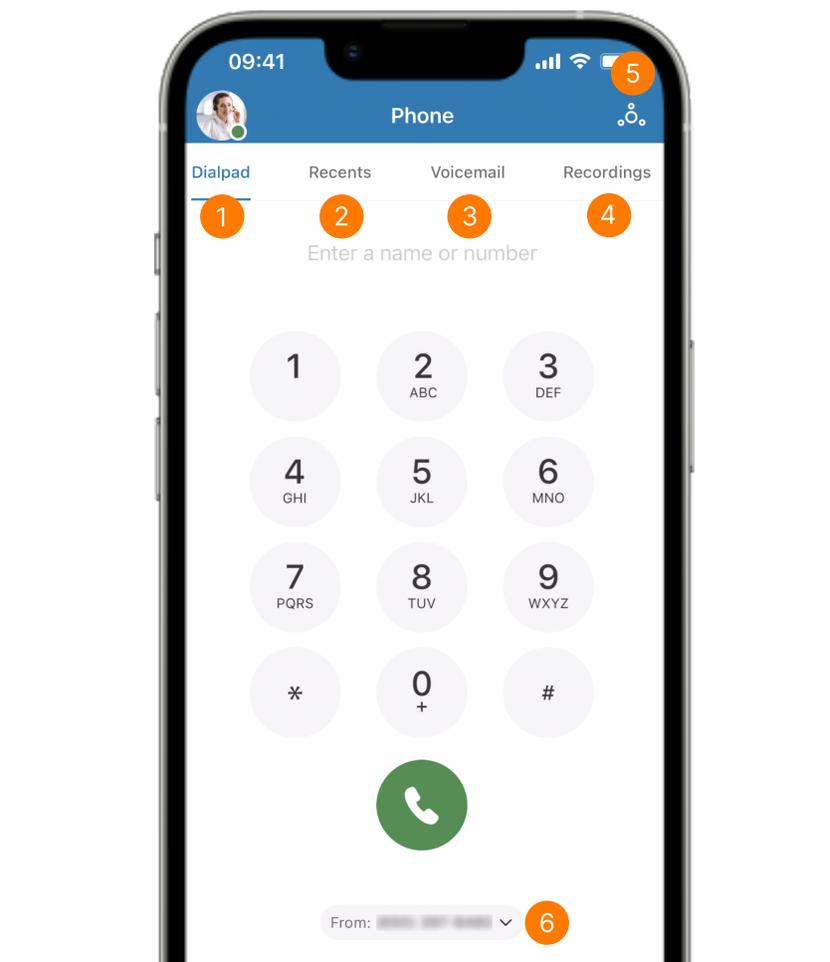
Phone Tips

1. Access the **Recents** tab to view your call log.
2. Search for a number or contact name using the search box.
3. Tap on a call log entry. You can choose to call, send a message, view the call details, or select **More** for additional actions, including start a video meeting and delete an entry.
4. Tap the **Filter** icon to show your missed calls or all calls.
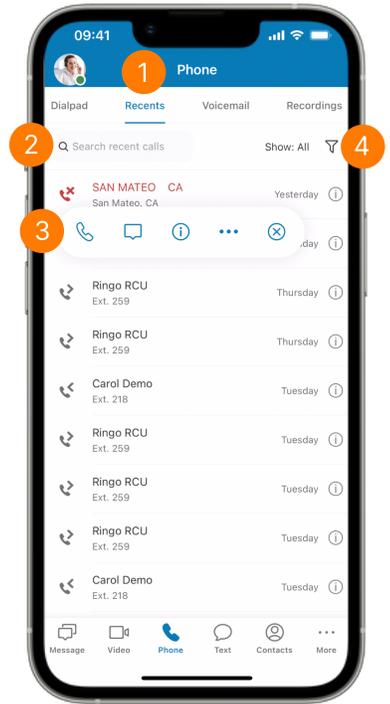
5. Check your voicemails in the **Voicemail** tab.
6. Search for a voicemail through the search box.
7. Use the **Filter** button to switch the view between all or unread voicemails.
8. Tap on an item to open the voicemail and view the transcript. The following options are also available:
   a. Play the message
   b. Send a message
   c. Call the sender
   d. Delete the voicemail
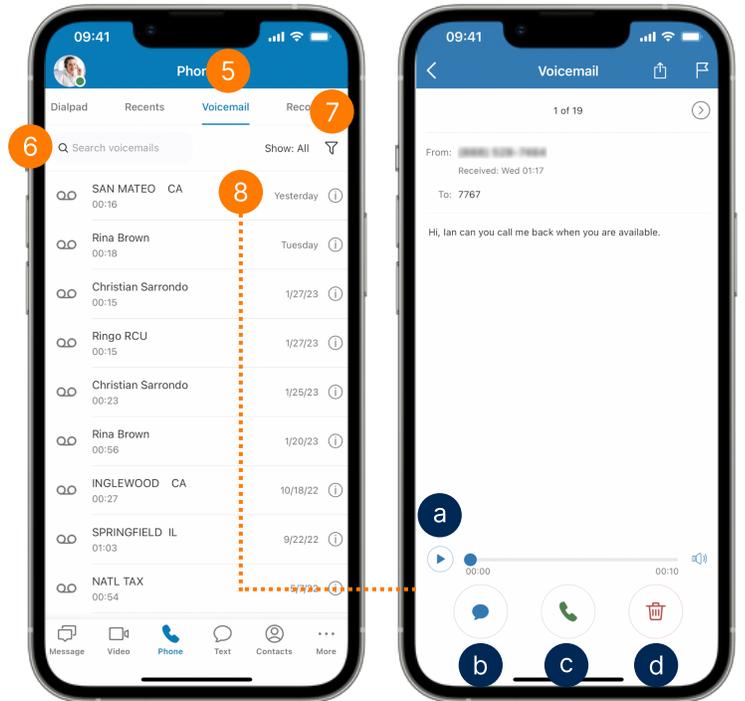
9. Access your call recordings in the **Recordings** tab.
10. Search for any recording using the search box.
11. Tap on an item to view the following options:
    a. Play the recording
    b. Switch the audio output from handset to speakerphone
    c. Send a text or start a direct message
    d. Start a call
    e. Delete the recording
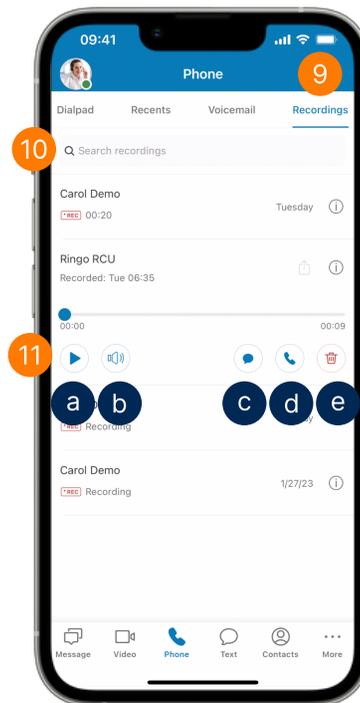
Text

Manage your text messages efficiently. Note that the availability of the Short Message Service (SMS) feature depends on your company account permissions.

1. Search for a text message using keywords or a contact's name or number in the search box.
2. Tap on any message to open it. Tap and hold on a message to select multiple messages to delete or mark them as read or unread.
3. Tap the ⊕ **Plus** icon to start a new text.
   a. Enter the name or phone number of your desired recipients.
   b. You can choose to send individual or group text messages.
4. ▽ **Filter** your text messages to show all, unread only, drafts, or failed messages.
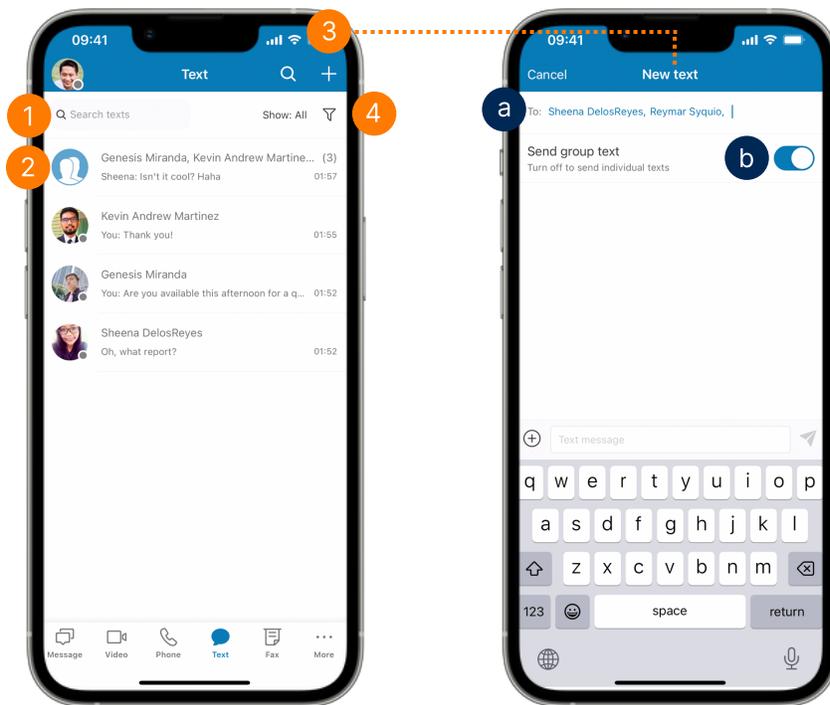
FAX

Send and receive faxes anytime, anywhere. Note that the availability of faxing depends on your account permissions.

1. Use the **Search** bar to search for a fax or a phone number from your fax messages.
2. Tap on an item to open the fax.
3. Tap the ⓘ **Info** icon to view the details of the sender or recipient.
4. Tap the ⊕ **Plus** icon to compose a fax.
   a. Type the fax number or name of the person you wish to send a fax message to.
   b. Select a **cover page**. You can choose from the available templates or upload your own custom cover page.
   c. Add a note to your cover page if needed.
   d. Tap **Add attachment** to attach files or photos.
   e. You can choose to send the message at a later time. Tap **Send later** and set the date and time.
   f. If you want to send it immediately, tap **Send**.
5. The fax message appears on the list of your fax messages while processing.
6. To remove a fax, swipe left on an item and tap **Delete**. Tap ⋯ **More** to delete multiple fax messages or mark them as read or unread.

End of Document