

MVP User Basics

Training Guide

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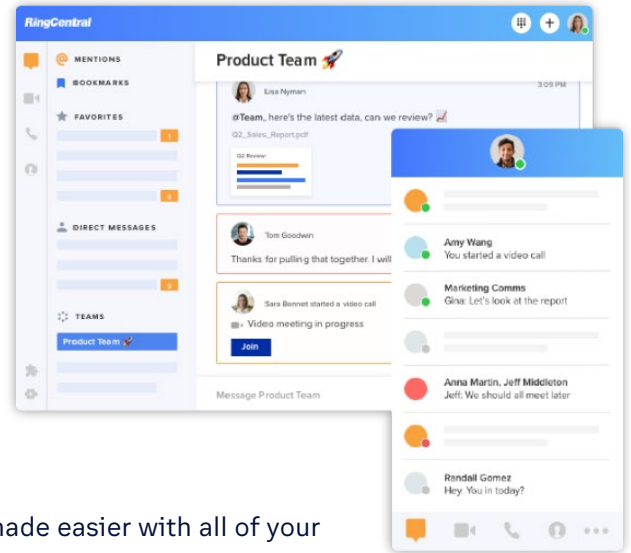
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RingCentral App

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 to navigate, 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.

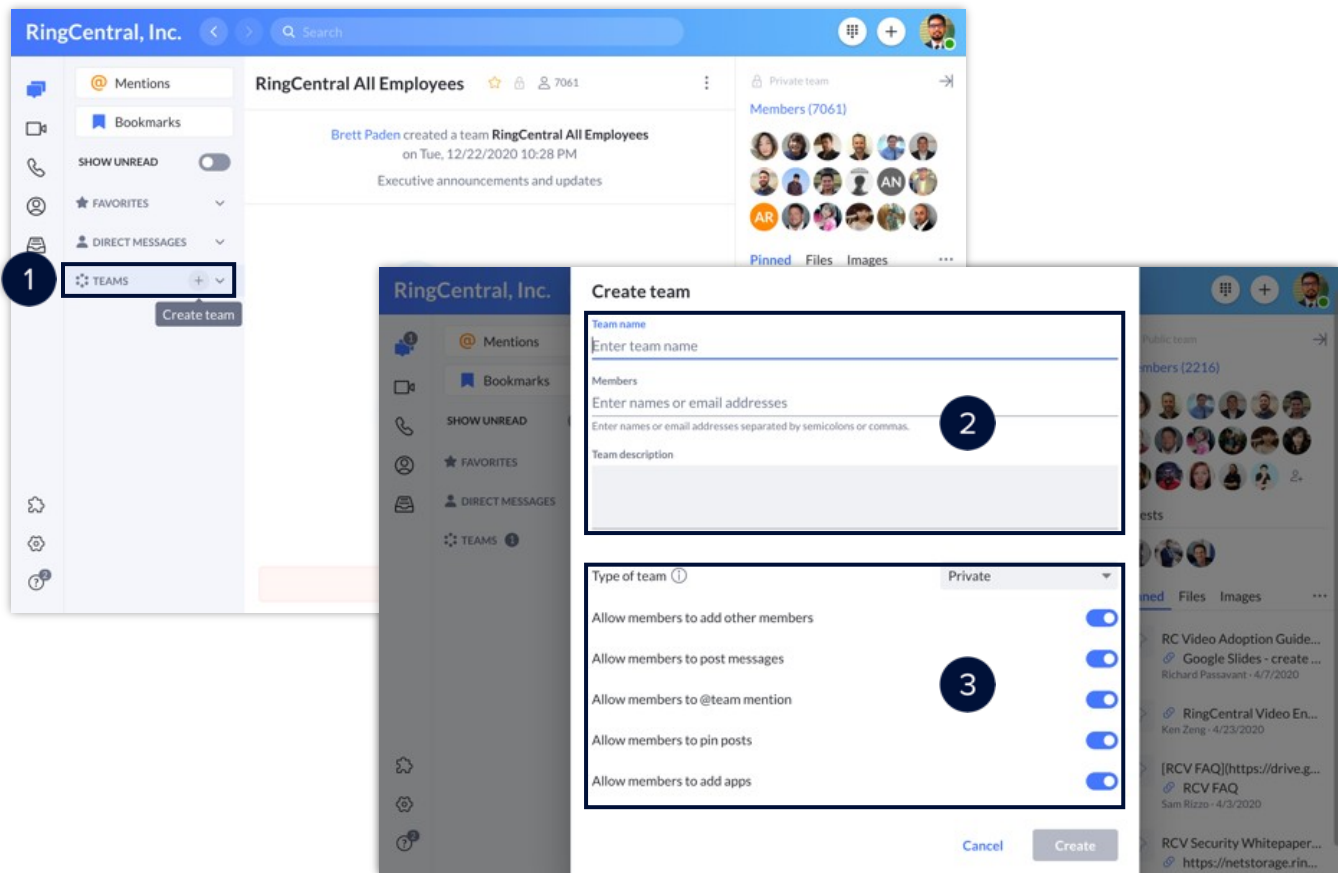
RingCentral App: Getting the Most Out of the RingCentral App

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.

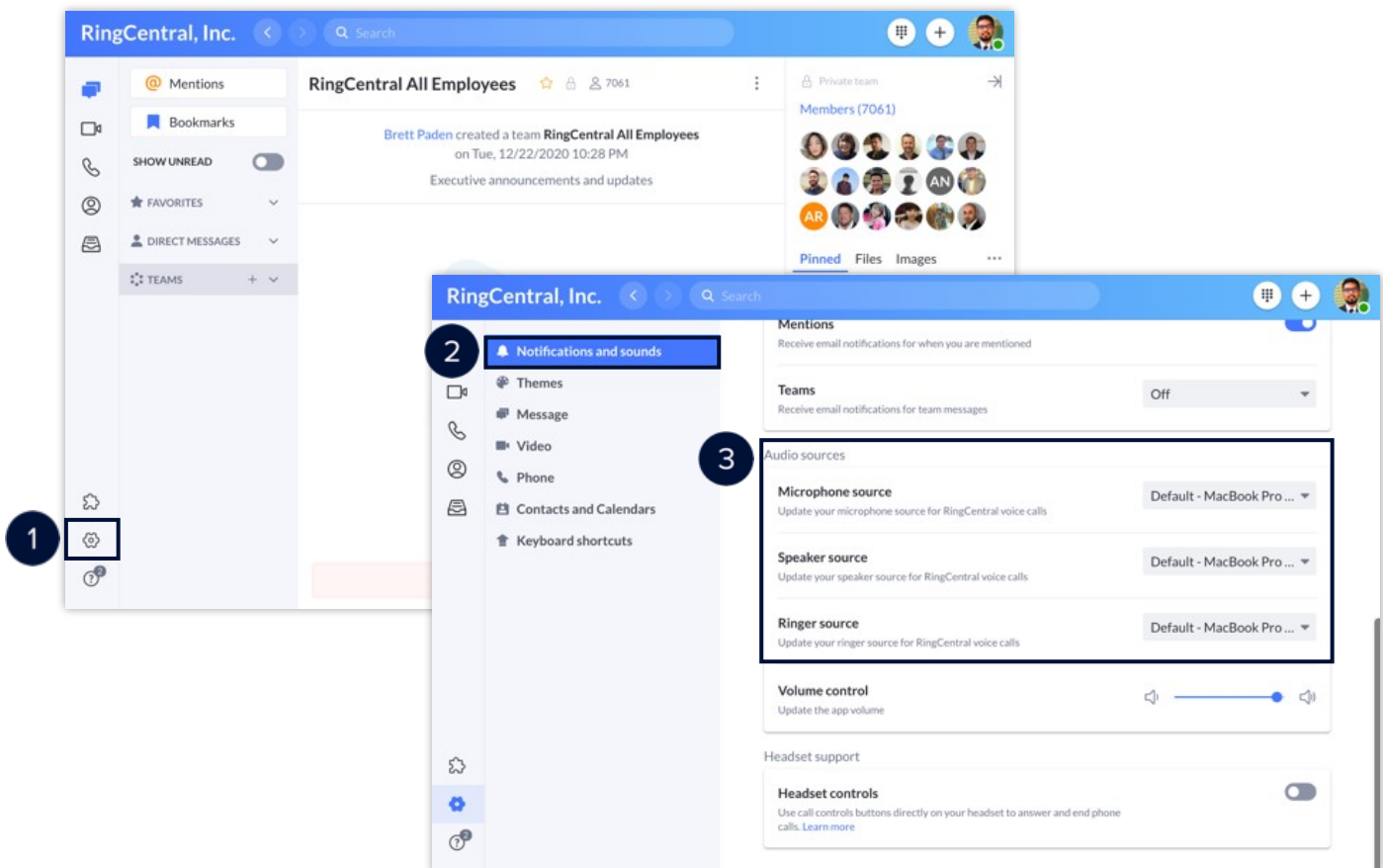
1. Click **Create team**.
2. Enter the team name, members, and team description.
3. Customize the team permissions.



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 sounds**.
3. Select the **Microphone, Speaker, and Ringer** Sources.

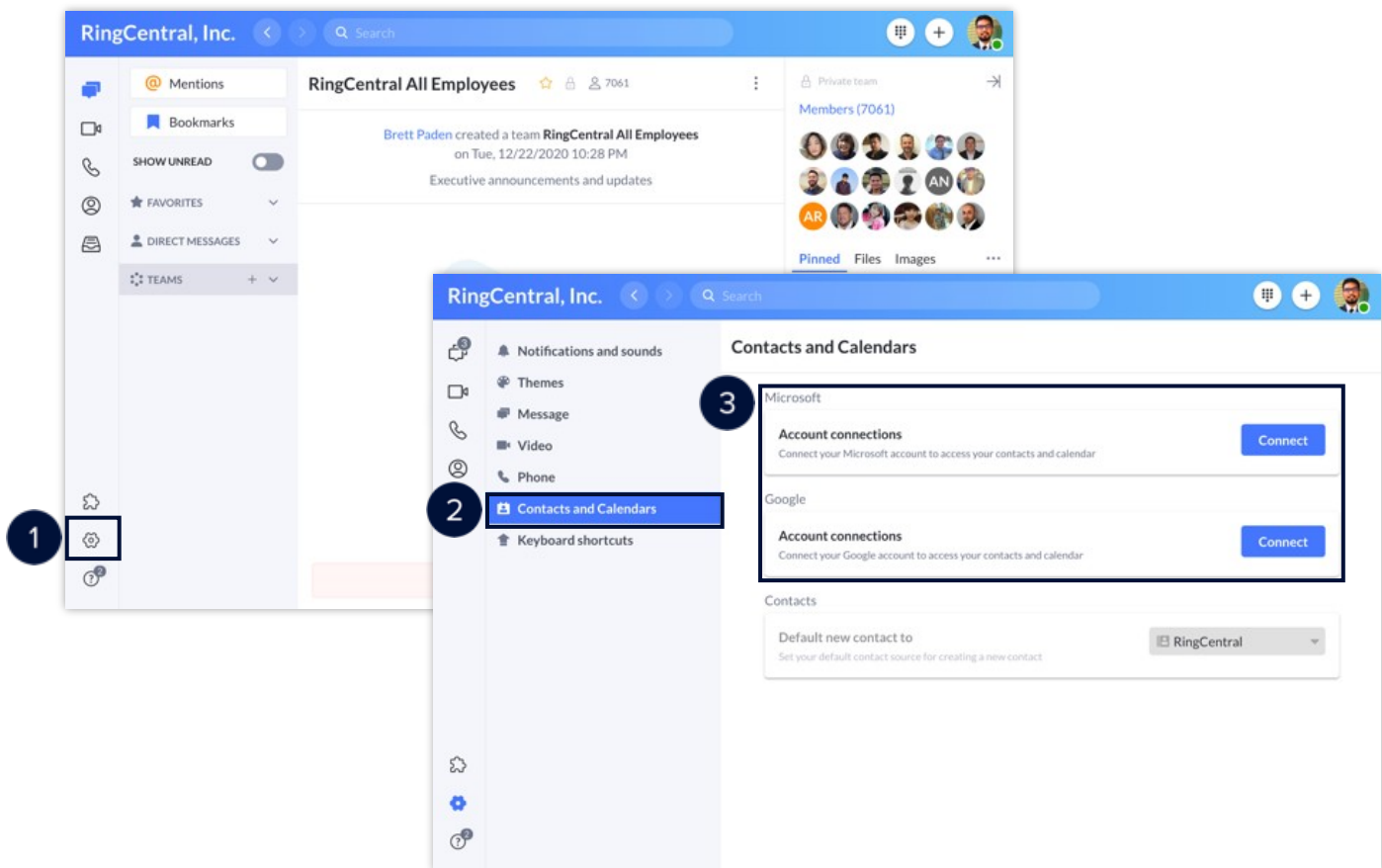


If you are using a supported headset, toggle **Headset controls ON** to use the buttons directly on your headset.

Connect your Contacts and Calendars

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

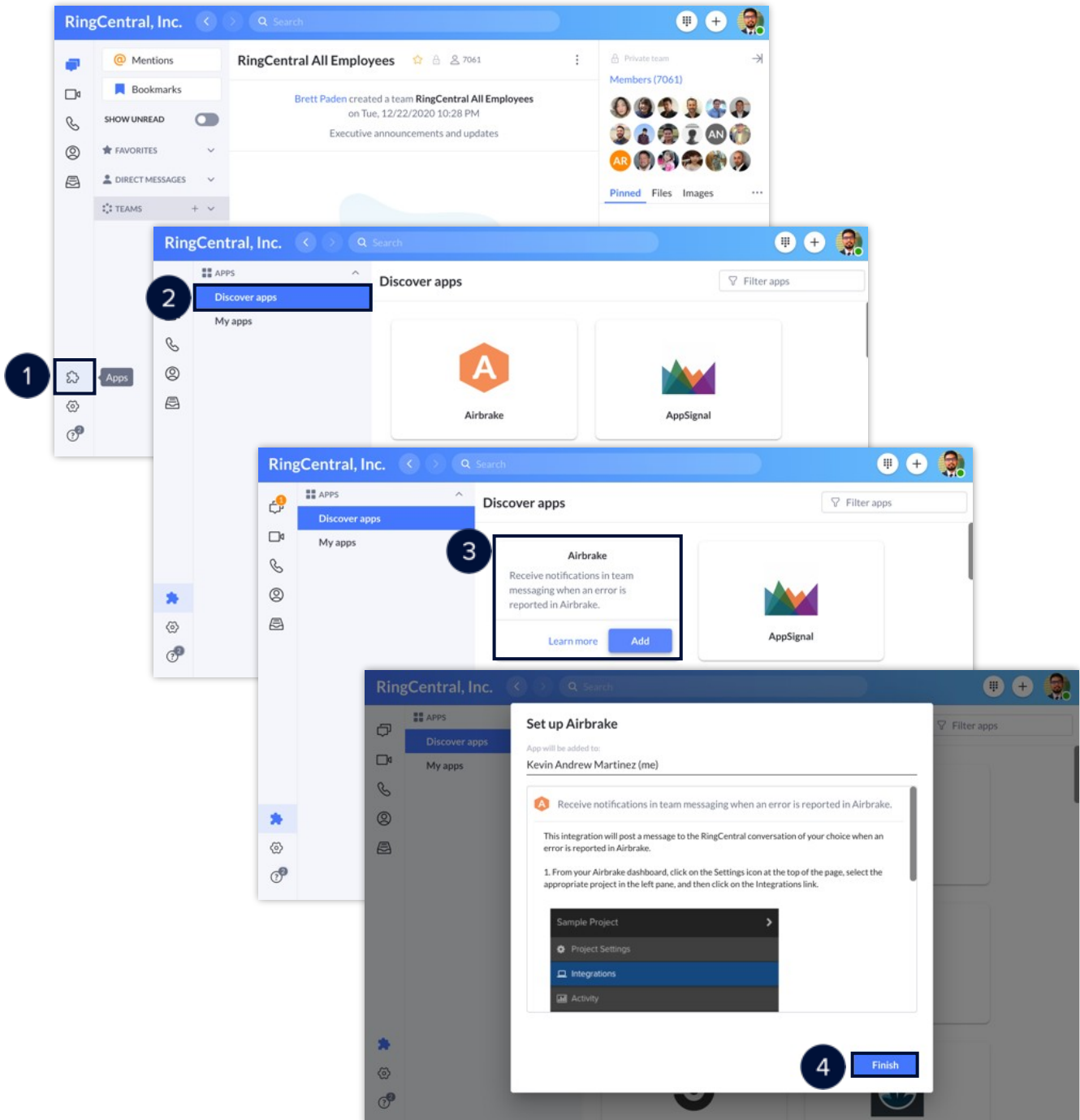
1. Click **Settings**.
2. Click **Contacts and Calendars**.
3. Choose between Microsoft or Google, then click **Connect**.



Integrate third-party apps

The app integration feature lets you integrate third-party apps with the RingCentral app to access services and features from other applications that your organization uses, making your daily workflow more efficient.

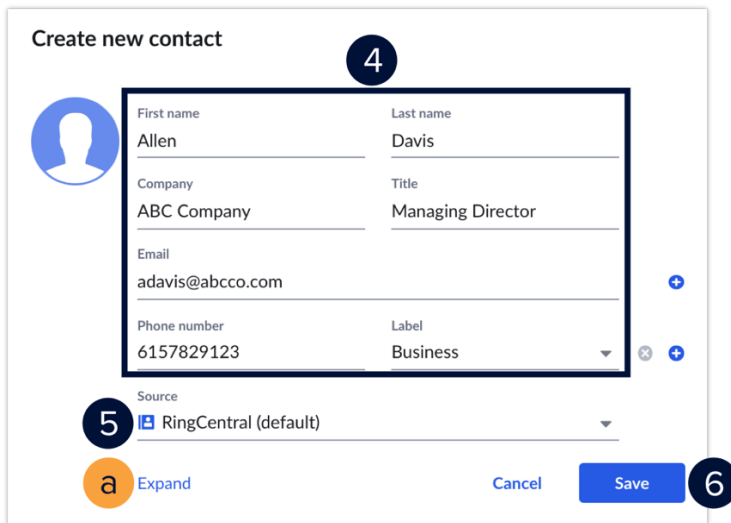
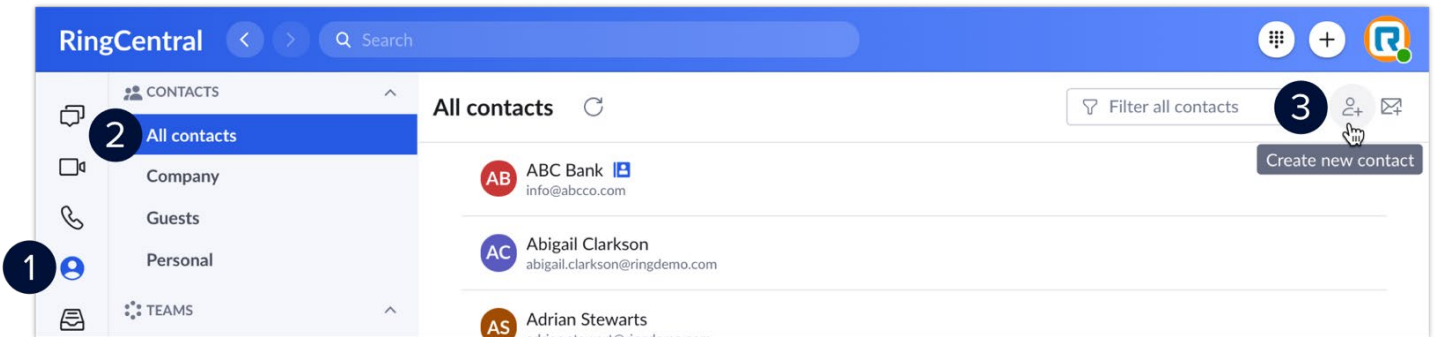
1. Click **Apps**.
2. Click **Discover apps** to see a list of supported apps.
3. Hover on the desired app and click **Add**.
4. Click **Finish**.



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:

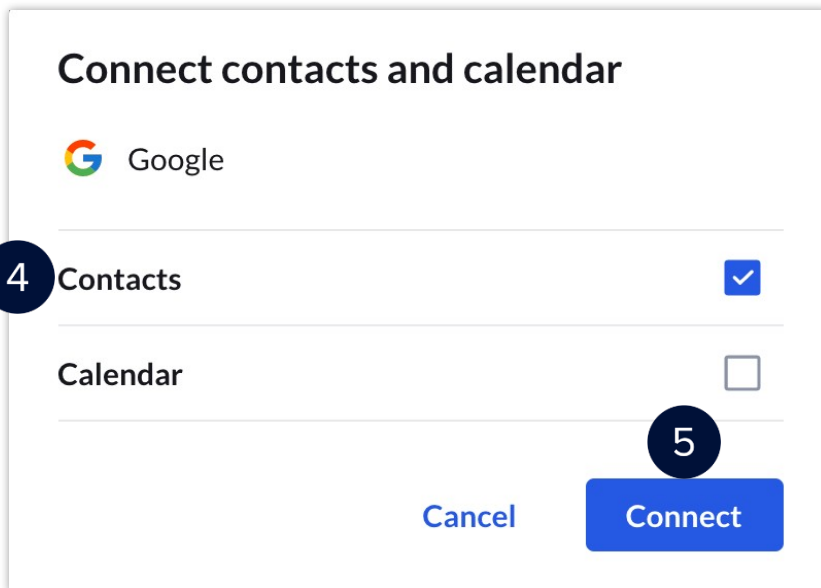
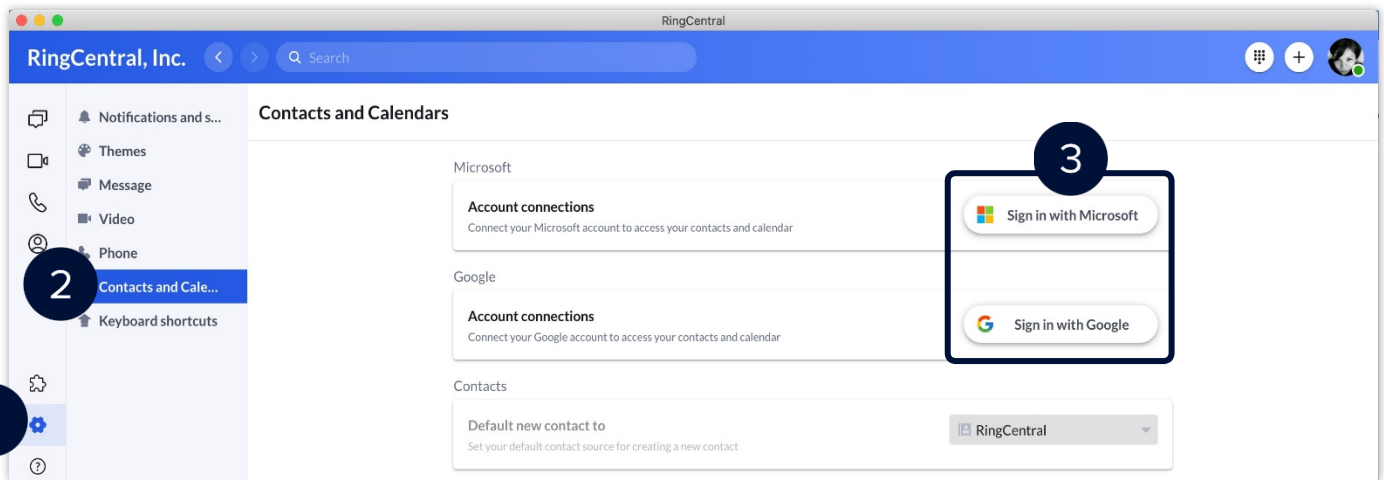
1. Click **Contacts**.
2. Select **All contacts**.
3. Click **Create new contact**.
4. Complete the new contact's details.
5. Select your preferred contact source in the Source drop-down menu. You can choose to your Microsoft or Google account as a contact source, if you have them synchronized with your 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:

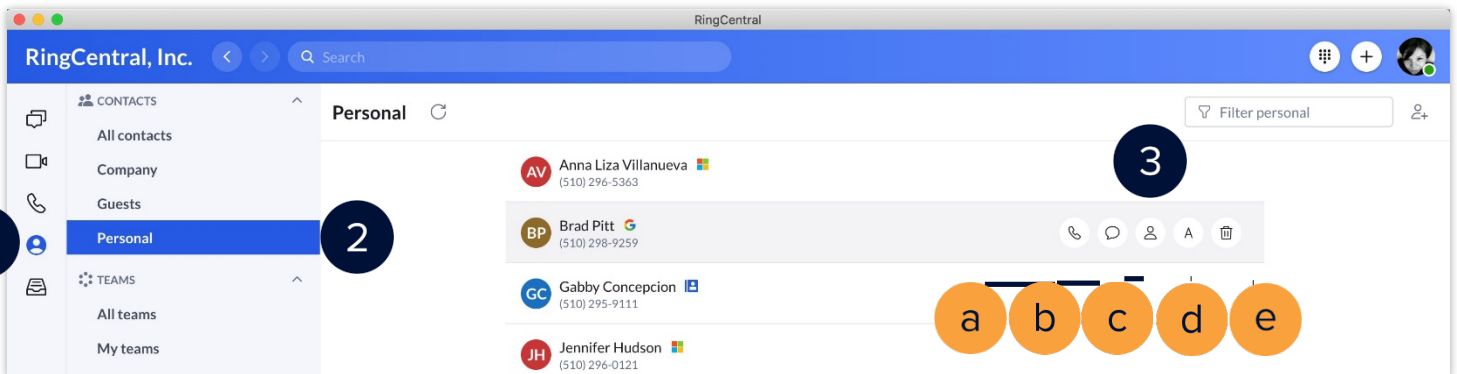
1. Click **Settings**.
2. Click **Contacts and Calendars**.
3. Click Sign in with Google or Sign in with Microsoft under Account Connections.
4. In the Connect contacts and calendar window, check **Contacts**.
5. Click **Connect**.
6. Follow the sign in process for your Google or Microsoft account to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



Viewing your contacts

To access your synchronized contacts, do the following steps:

1. Click **Contacts**.
2. Click **Personal**.
3. Hover your mouse over a specific contact to see your available actions or click to view more details.
 - a. **Call** – 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.
 - 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.



Your contacts are tagged with a Google or Microsoft icon to indicate their source.

Any changes made on the contact details reflect on your Google or Microsoft account.

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.

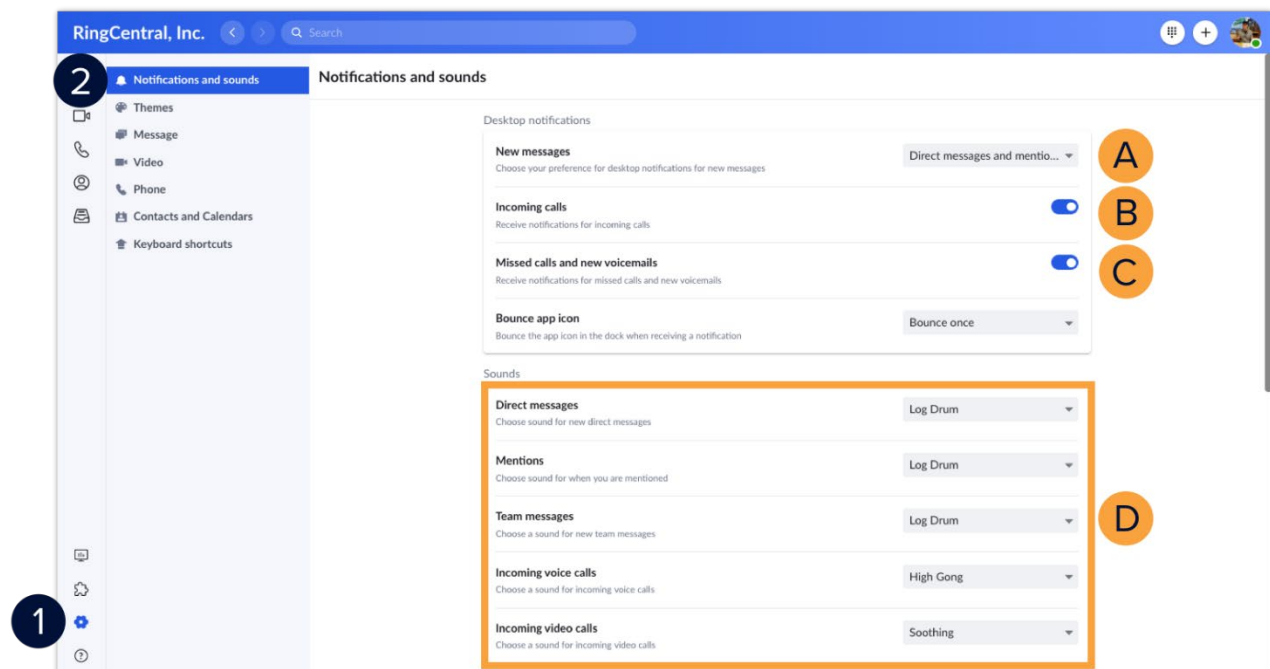
Configure your desktop notifications and sound settings

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 sounds**.

Then, modify the following settings according to your preference:

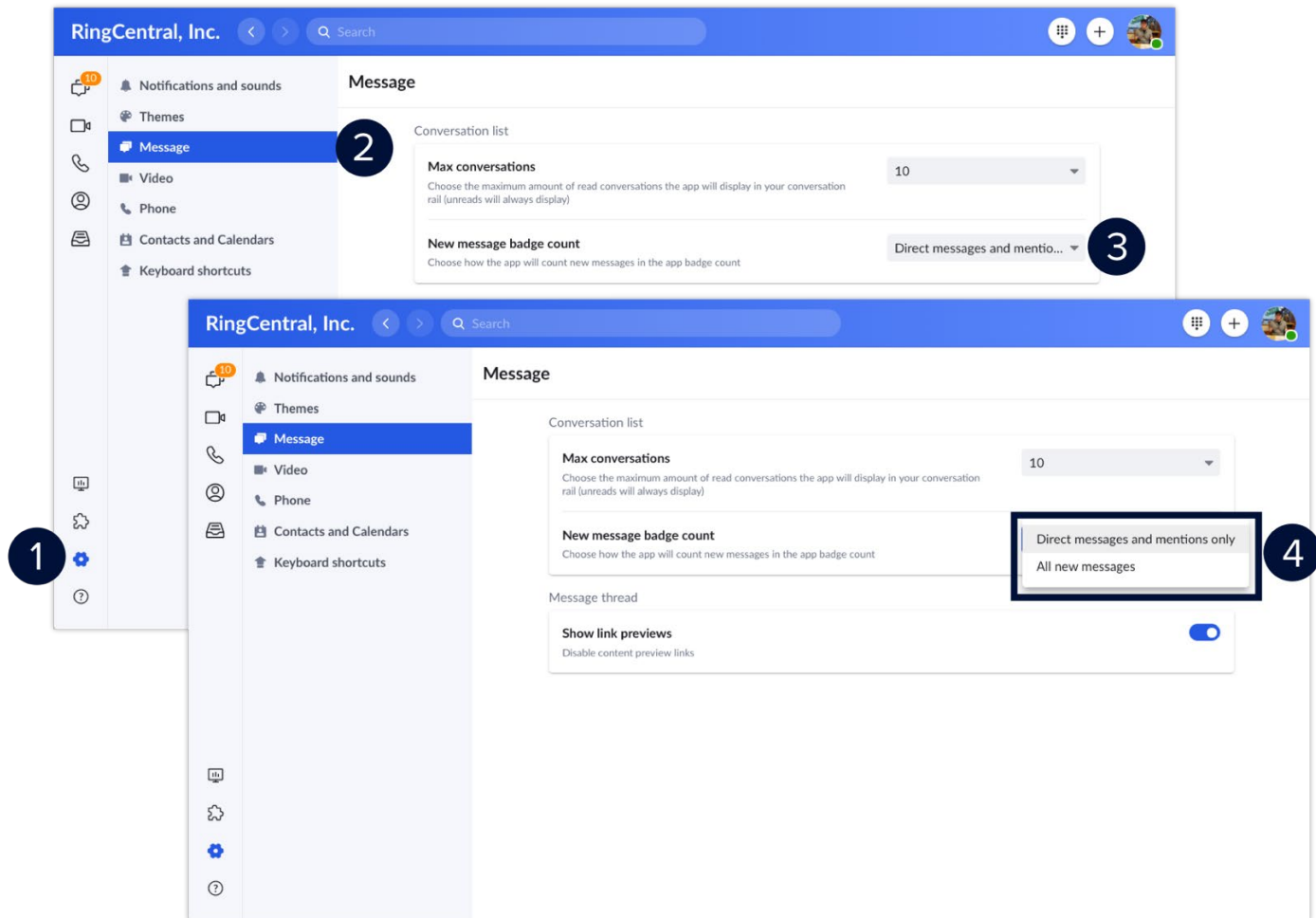
- New messages** – Choose if you want desktop notifications for all new messages or for only direct messages and @mentions. You can also turn this setting off, so you don't get any desktop notifications for any new messages.
- Incoming calls** – Allows you to enable or disable desktop notifications for incoming calls.
- Missed calls and new voicemails** – Enables or disables desktop notifications for missed calls and new voicemails.
- 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.

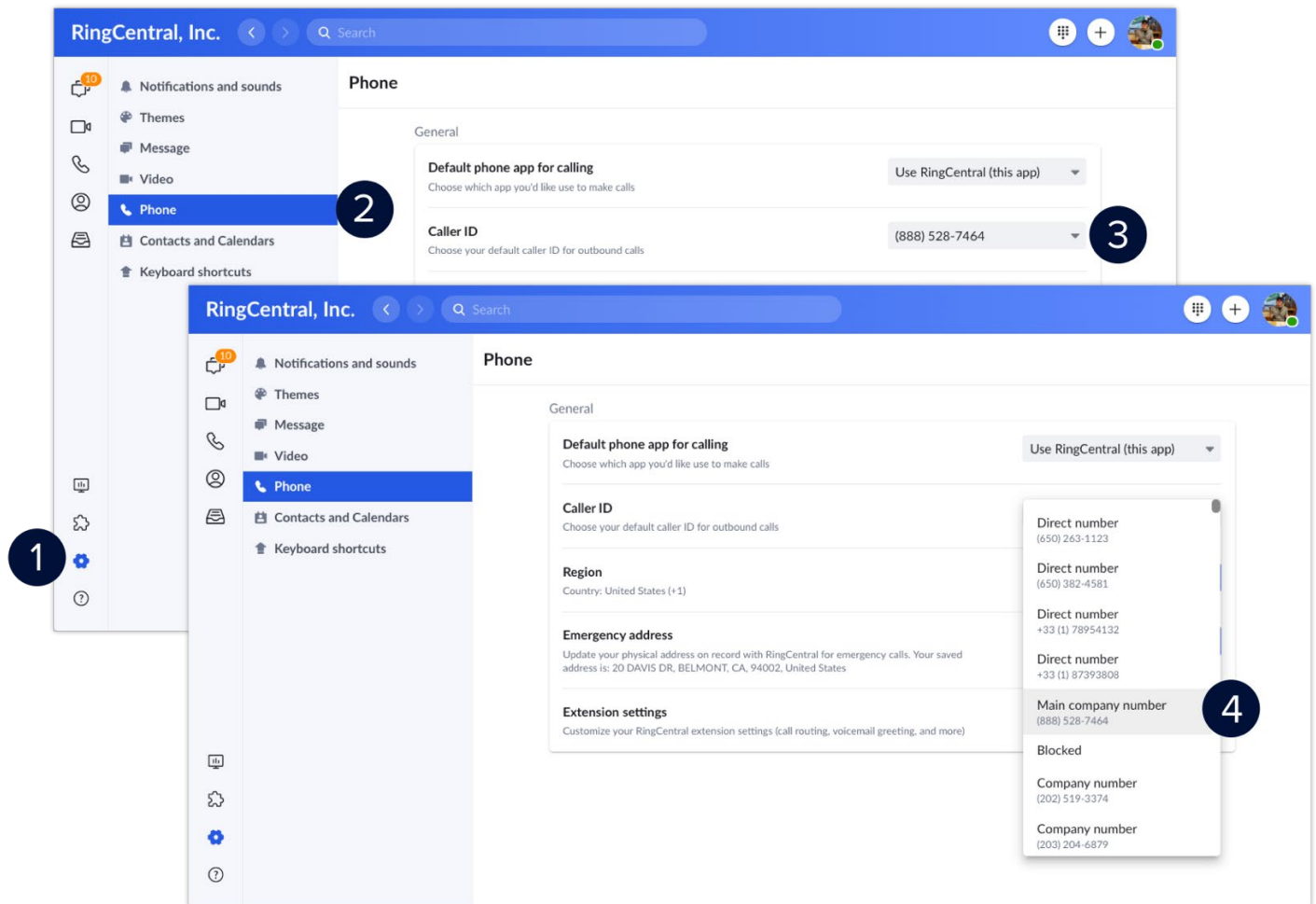
1. Click **Settings**.
2. Click **Message**.
3. Click the **New message badge count** drop-down menu.
4. Select your preferred setting.



Configure your caller ID

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

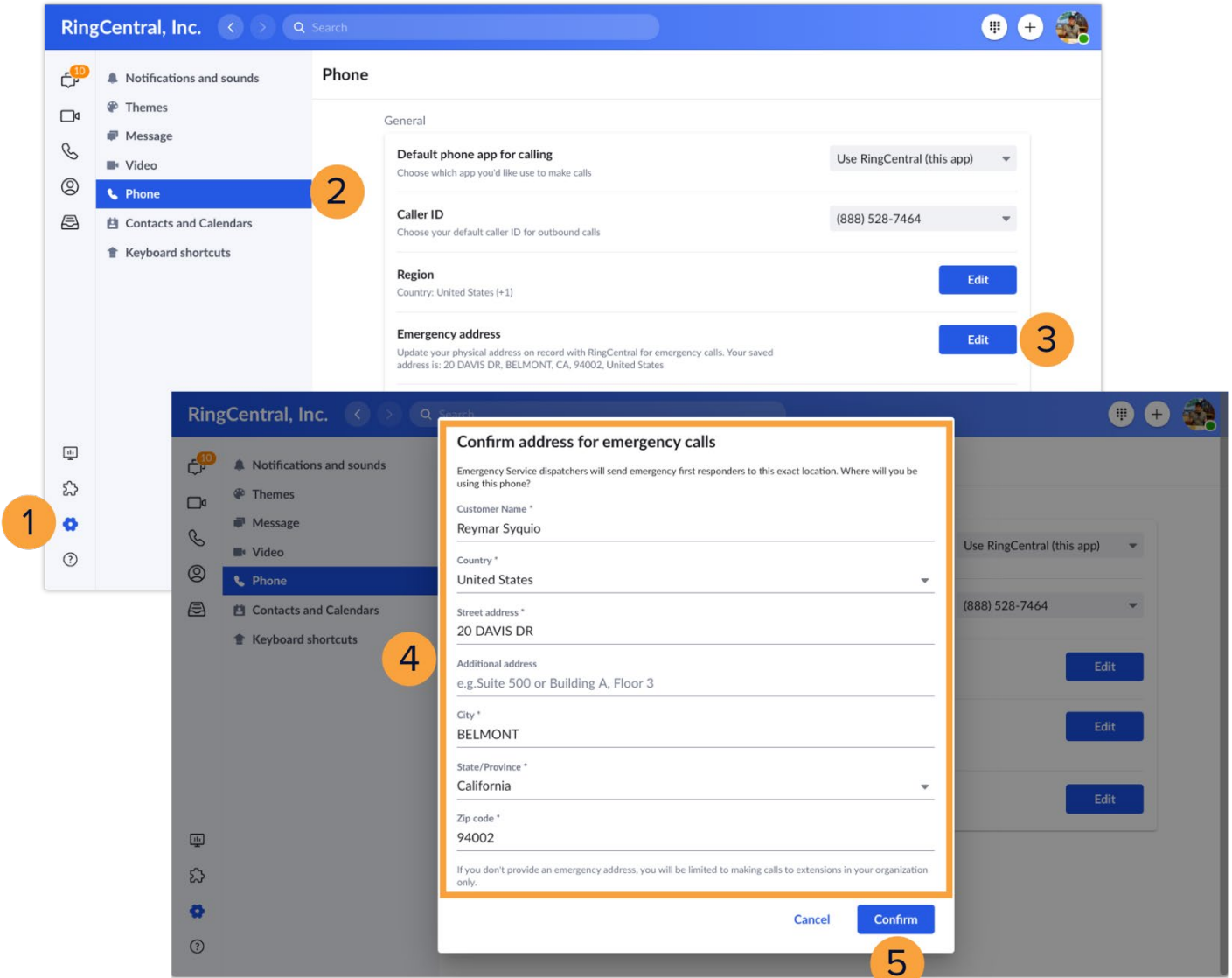
1. Click **Settings**.
2. Click **Phone**.
3. Click the **Caller ID** drop-down menu.
4. Select your preferred Caller ID.



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 address section, click **Edit**.
4. Type your Emergency address details.
5. Click **Confirm**.

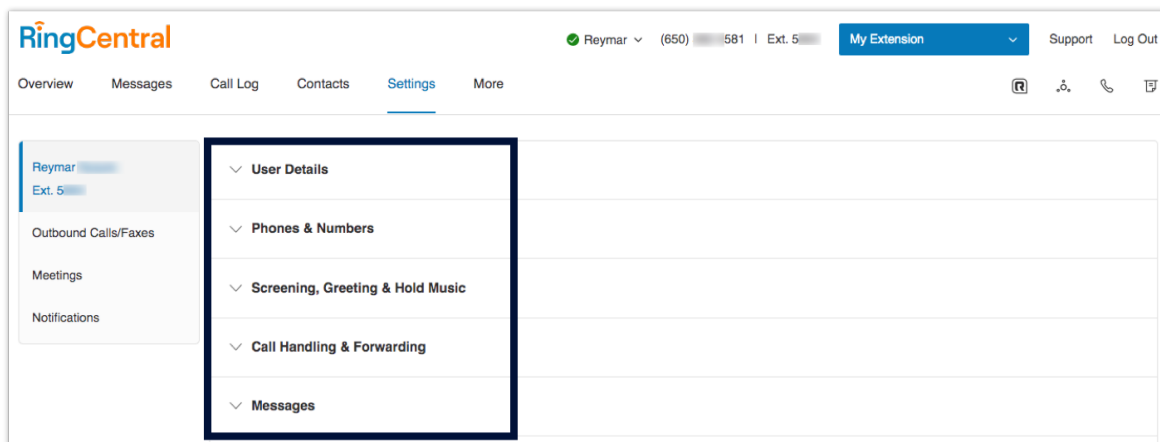
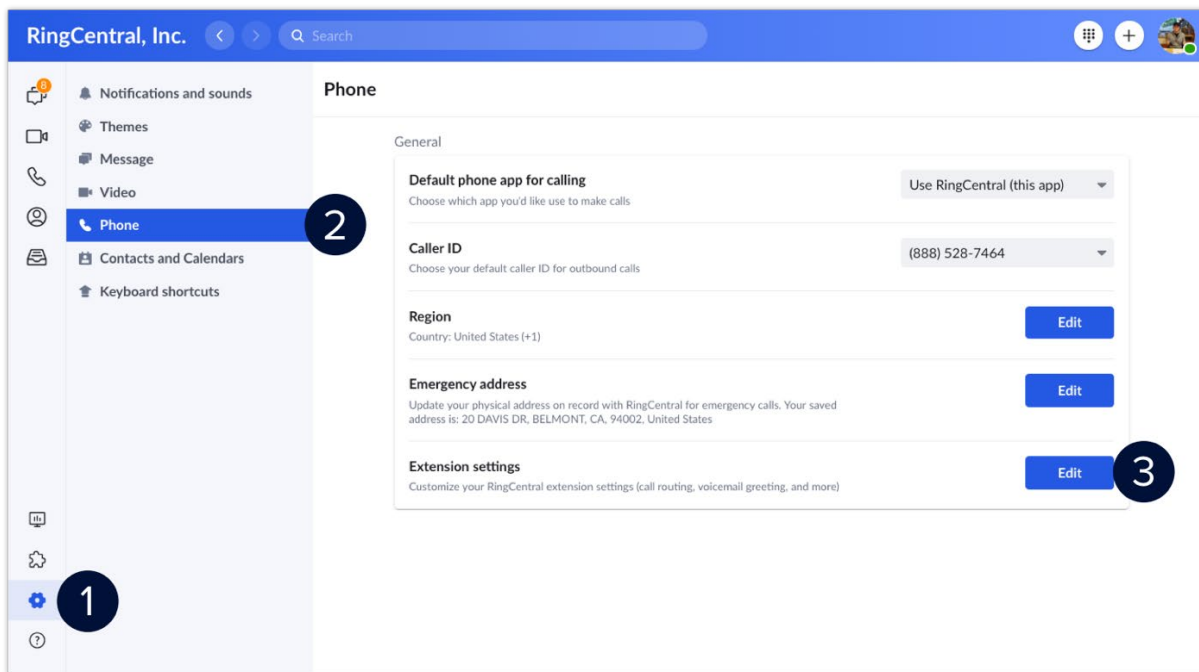


RingCentral App: Accessing your Extension Settings

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**.

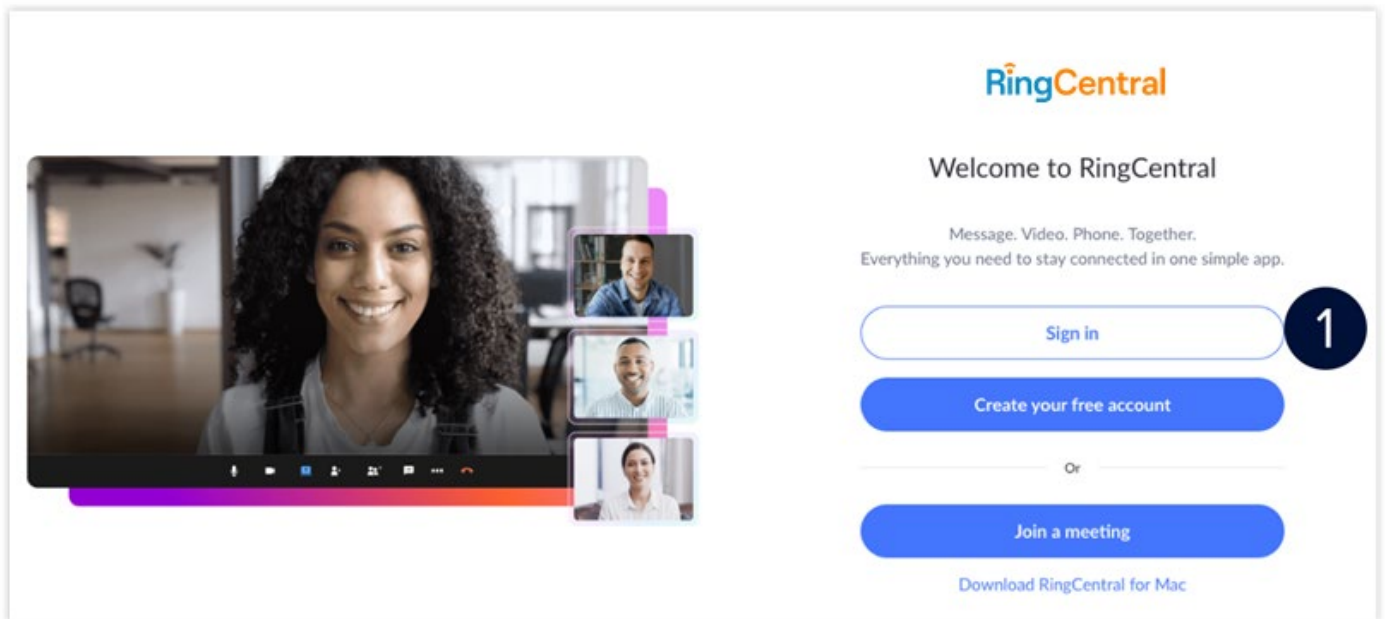
A browser window displays with your extension settings section pulled up. Now you can proceed with making the necessary configuration changes for your extension.



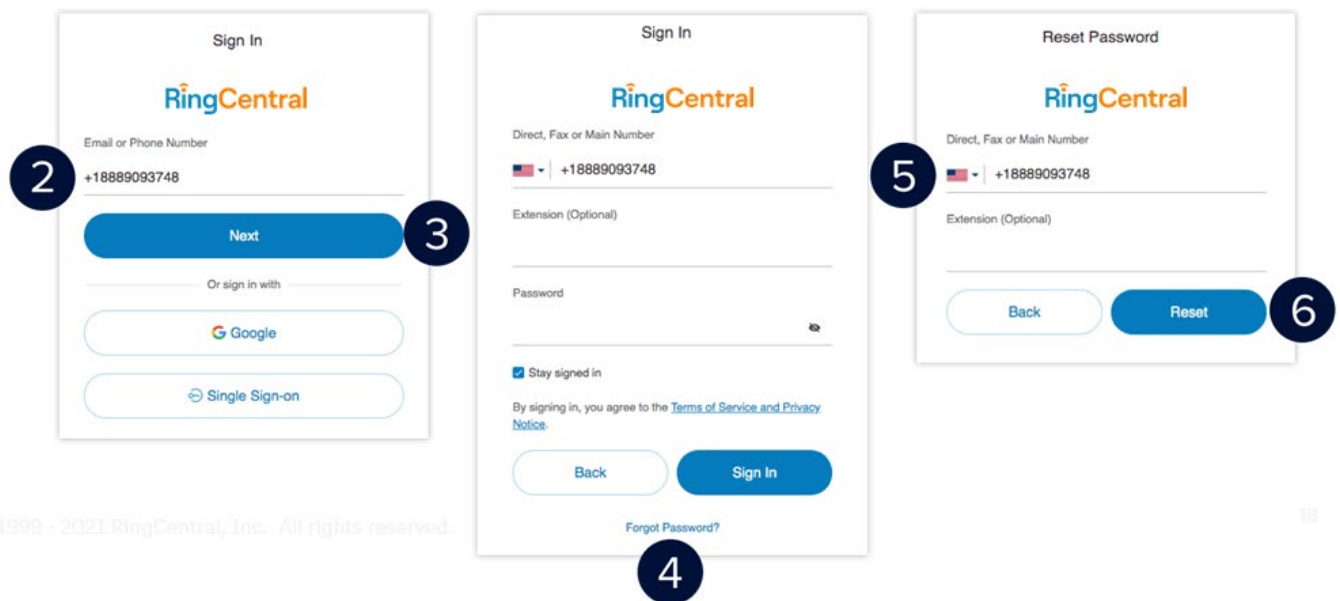
RingCentral App: Resetting your Password

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.
6. Click **Reset**.



You can also enter your extension number as an optional step.



7. Open the email sent to your extension's registered email address and click **Reset Your Password**.
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.

The image displays two screenshots from the RingCentral password reset process. The first screenshot is an email notification with the RingCentral logo at the top. It says "Dear Reymar" and "Looks like you want to reset your password. Let's get you updated." Below this is a blue button labeled "Reset Your Password" with a circled number 7 next to it. At the bottom, there is a link to the password reset page. The second screenshot is a mobile app interface for setting a new password. It has the RingCentral logo and the title "New Password". There is a password input field with a circled number 8 next to it. Below the input field is a "Password Criteria" section with a list of requirements: "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)", and "Length 8-32 characters". Below the criteria is a "Reenter New Password" field with a circled number 9 next to it. At the bottom is a blue "Save" button with a circled number 10 next to it.



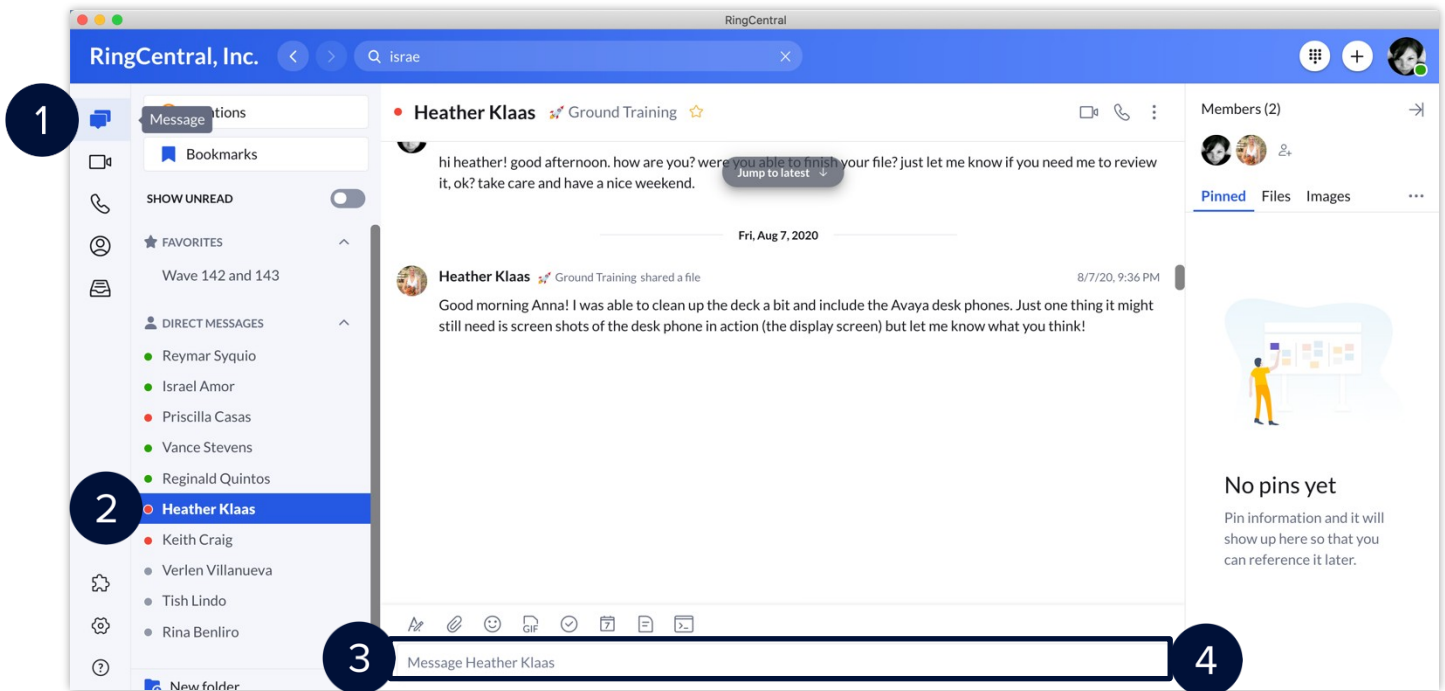
Message

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.



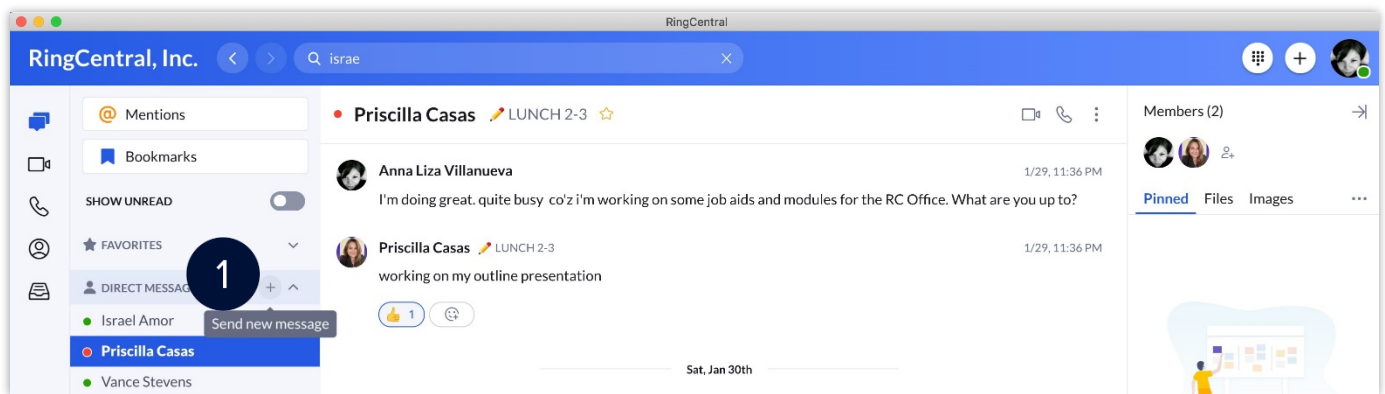
Sending a team message

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

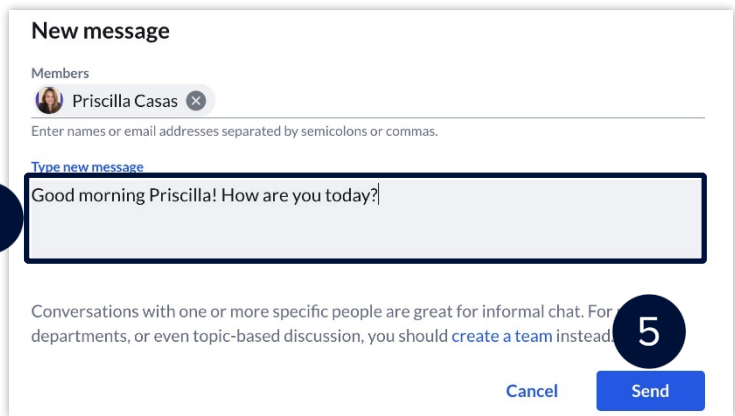
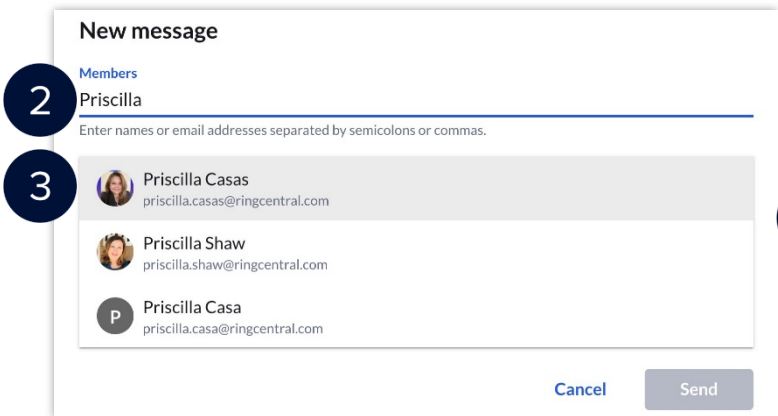
- Send a new message via the **Send new message** button
- Send a message via the **New actions** button
- Send a message by searching and selecting contacts using the **Search bar**

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.
3. Once the individual, group, or team appears, select it.
4. Type a message in **Type new message**.
5. Click **Send**.



For external contacts, type their e-mail address.

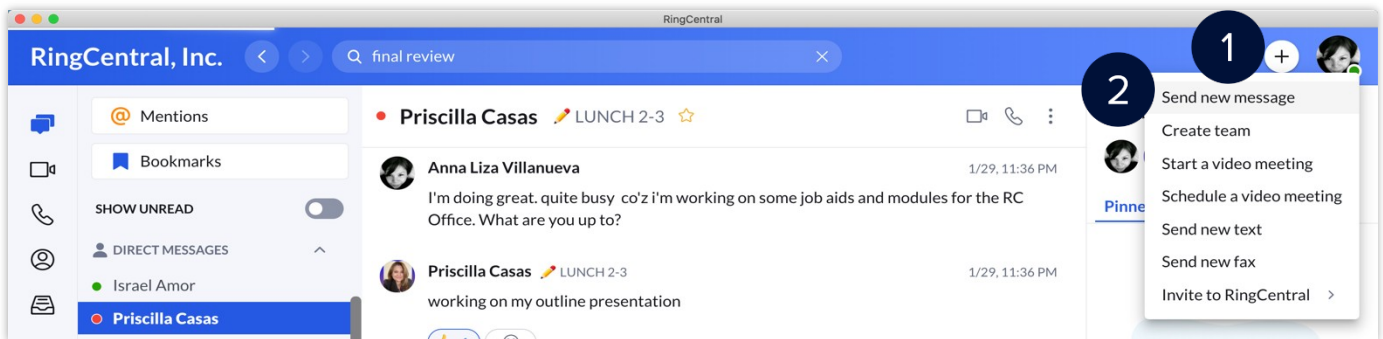


Once you send a new message, that message appears in the conversation thread.

RingCentral App | Sending Team Messages

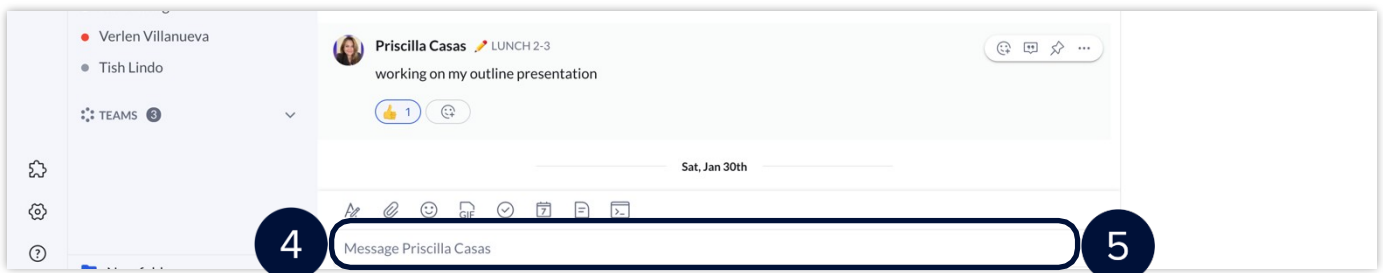
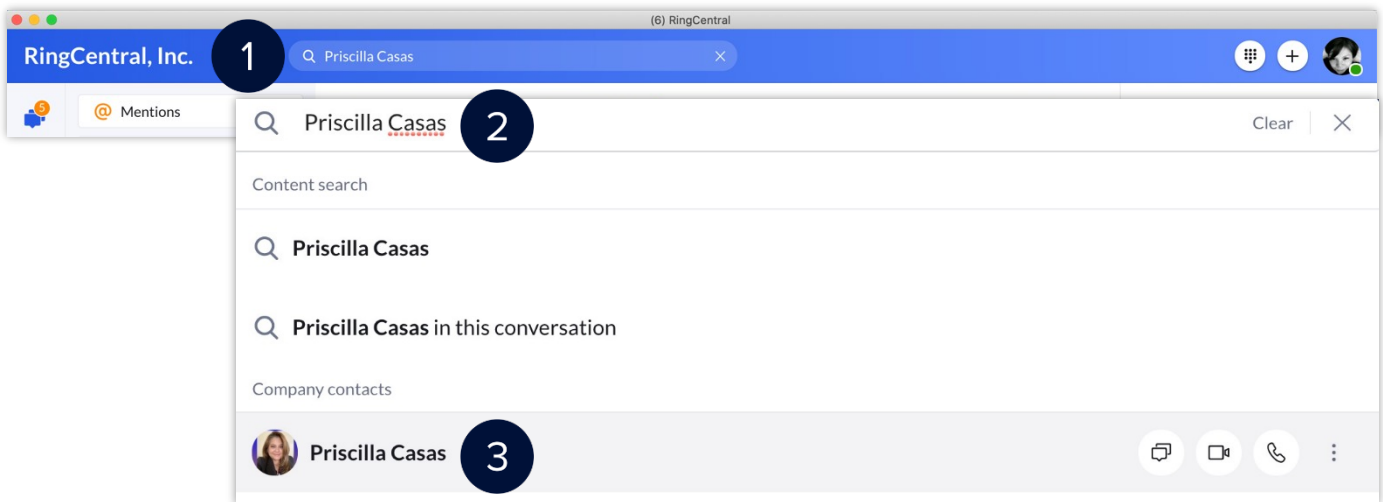
The second method of sending a text message is via the **New Actions** button. To do this, follow these steps:

1. Click the **New actions** button at the top right.
2. Select **Send new text** 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 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.

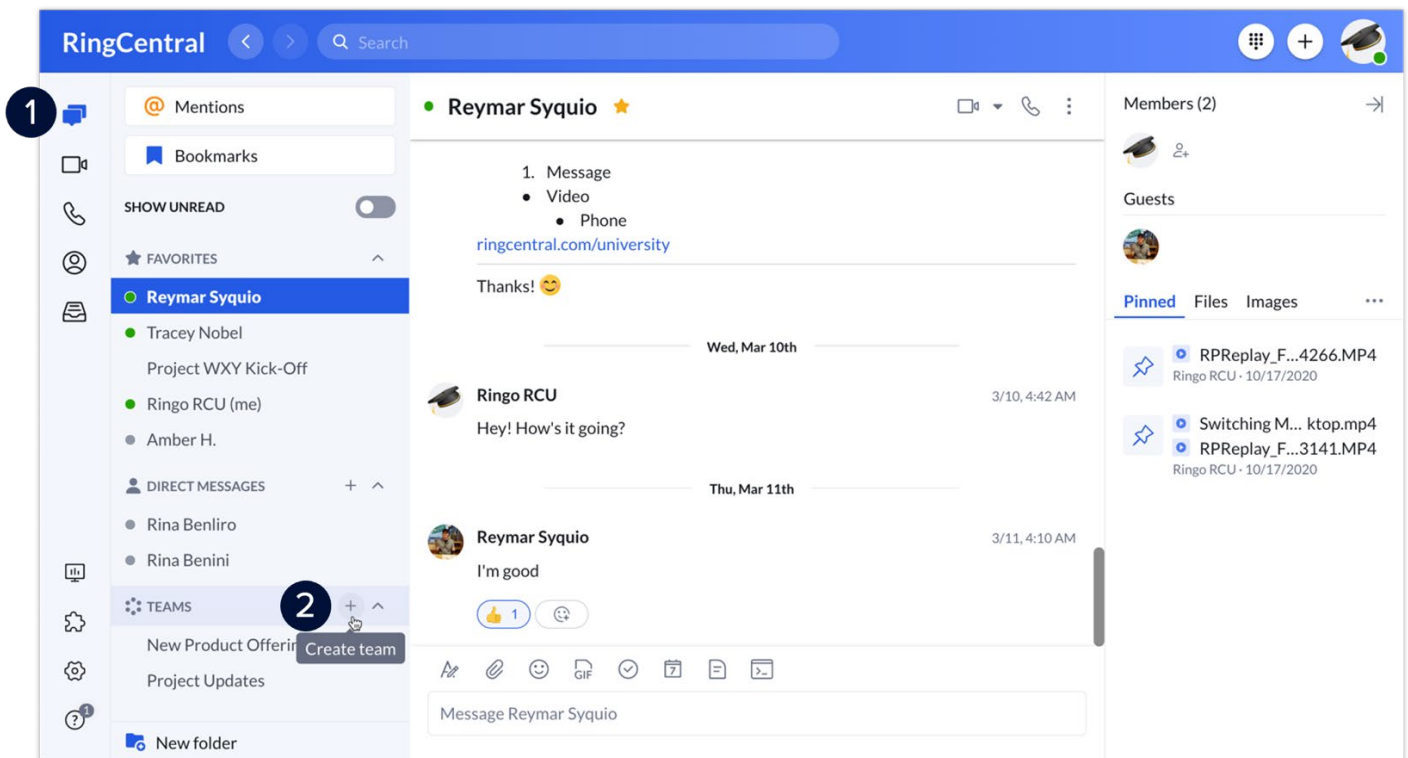
There are several methods for creating a team:

- 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 drop-down 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**.

Create team 3

Team name
Project XYZ

Members
Reymar Syquiao × Rina Benliro × Carol Demo ×

Team description
Let's get Project XYZ rolling!

Type of team ⓘ Private ▼
Private
Public

Allow members to add other members

Allow members to post messages

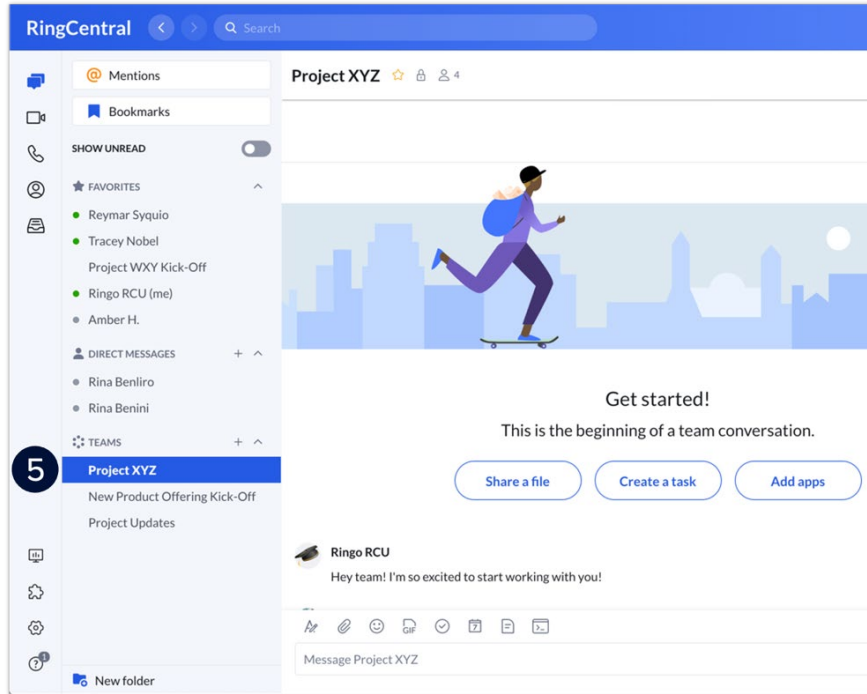
Allow members to @team mention

Allow members to pin posts

Allow members to add apps

Cancel Create 4

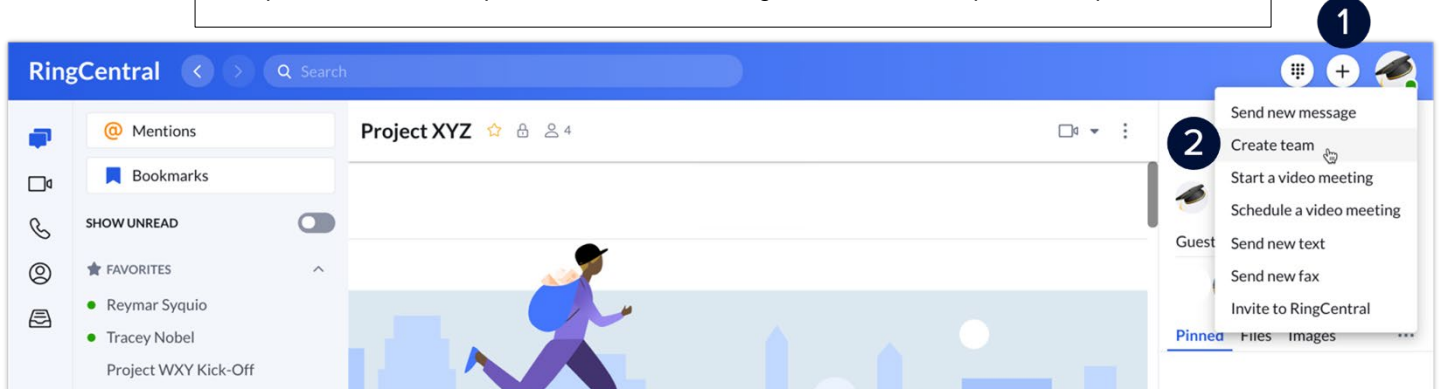
5. The new team appears at the top of the **TEAMS** section in the left pane. Select it to go to the team's conversation thread and start collaborating.



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.

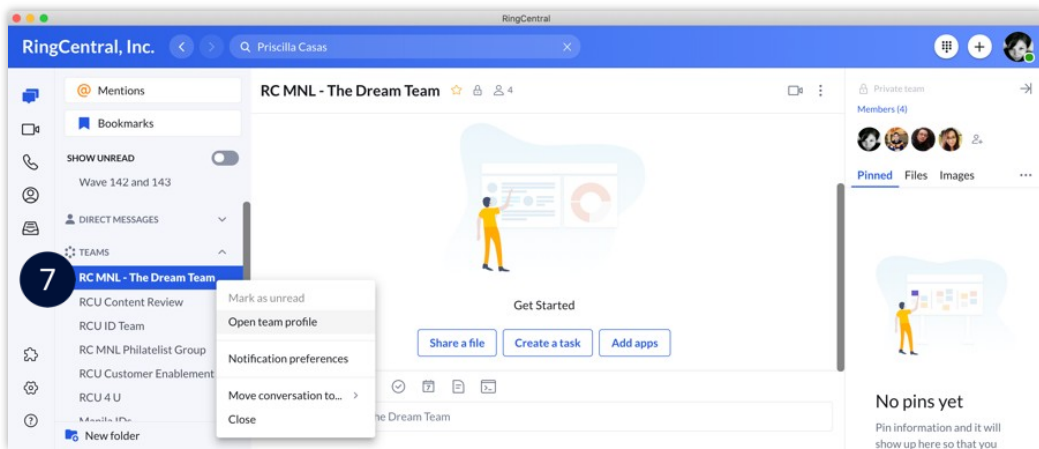
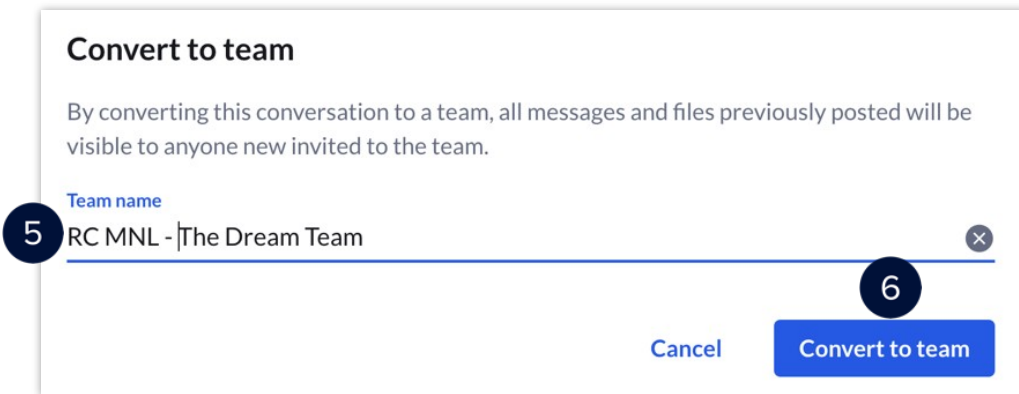
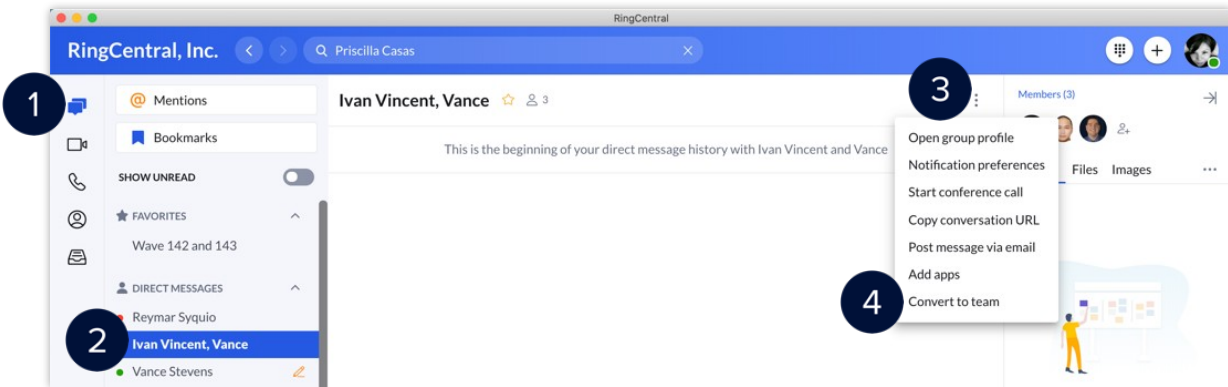
Repeat the same steps detailed in “Creating a Team” to complete this process.



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.



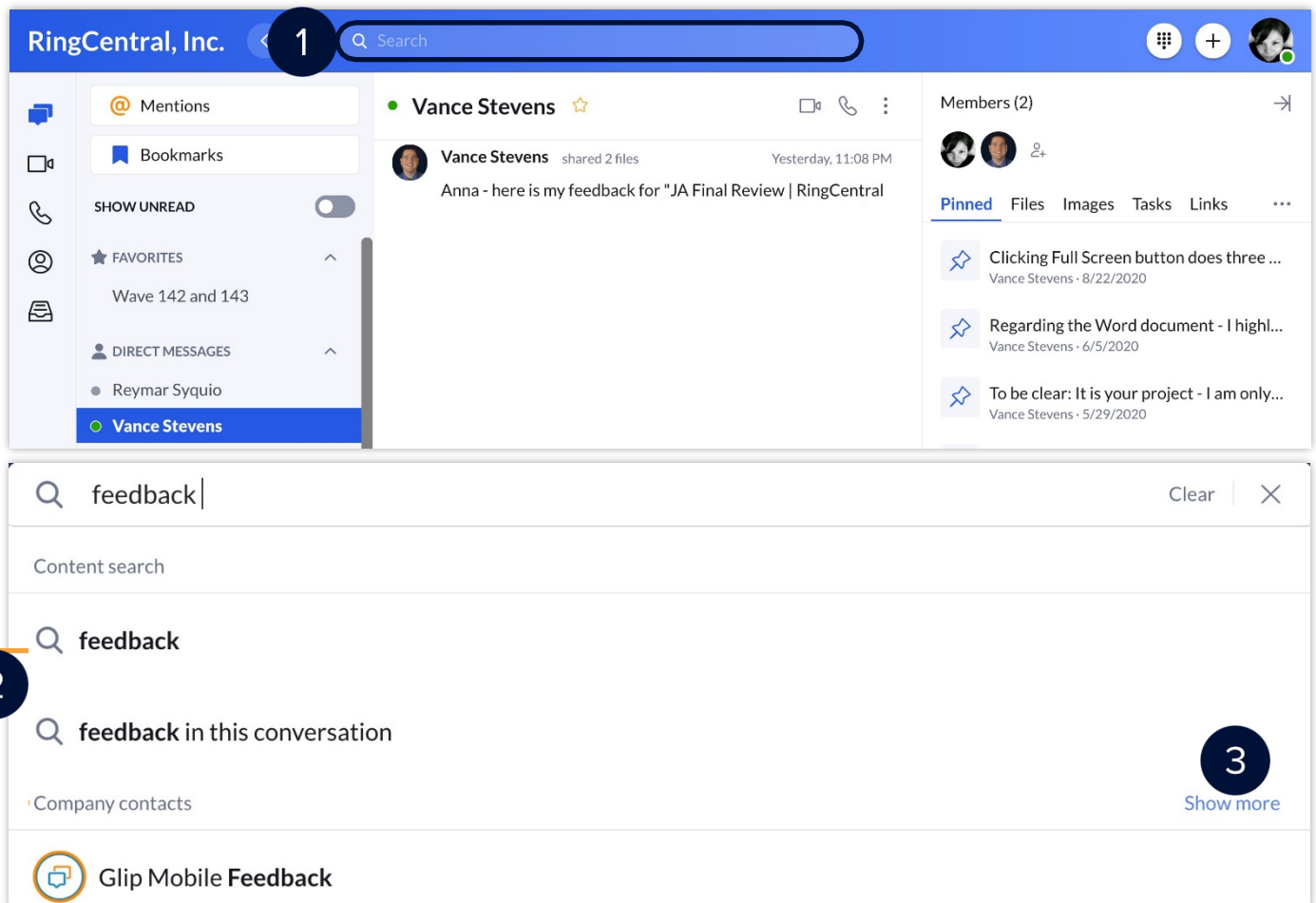
RingCentral App: Searching and Bookmarking Messages

The RingCentral app allows you to search through all of 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

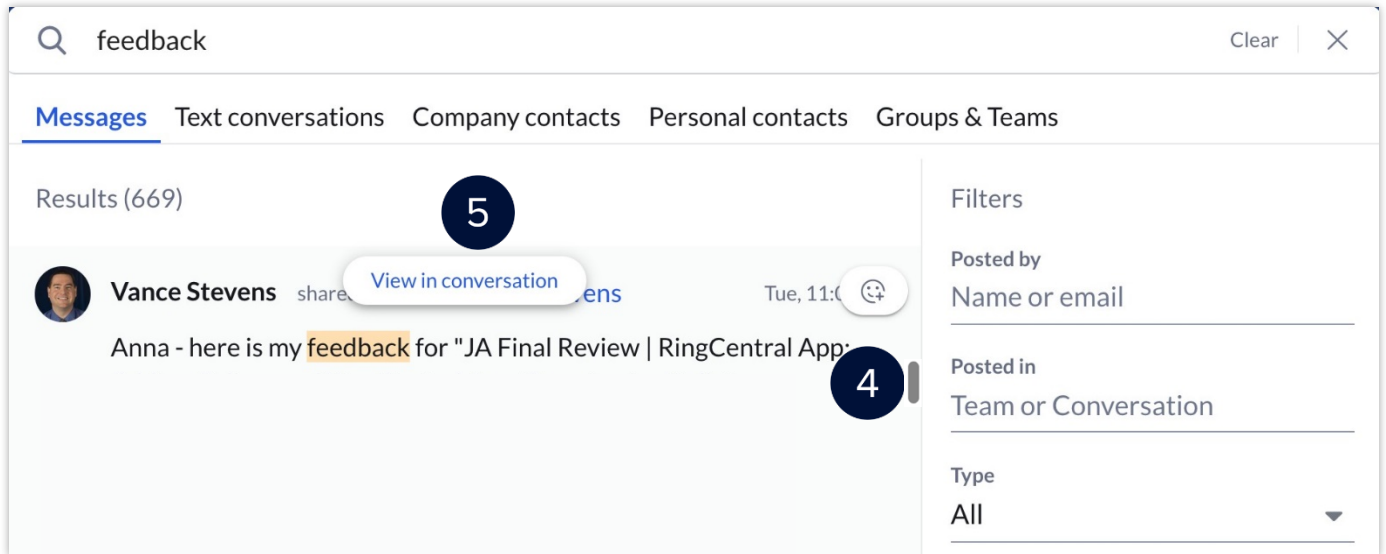
Scrolling back and reading several posts or messages can take a lot of time. The RingCentral app's search feature helps you quickly find what you need. Here's how to use this feature:

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
3. Click the **Show more** text to view the full list of search results for a specific category.



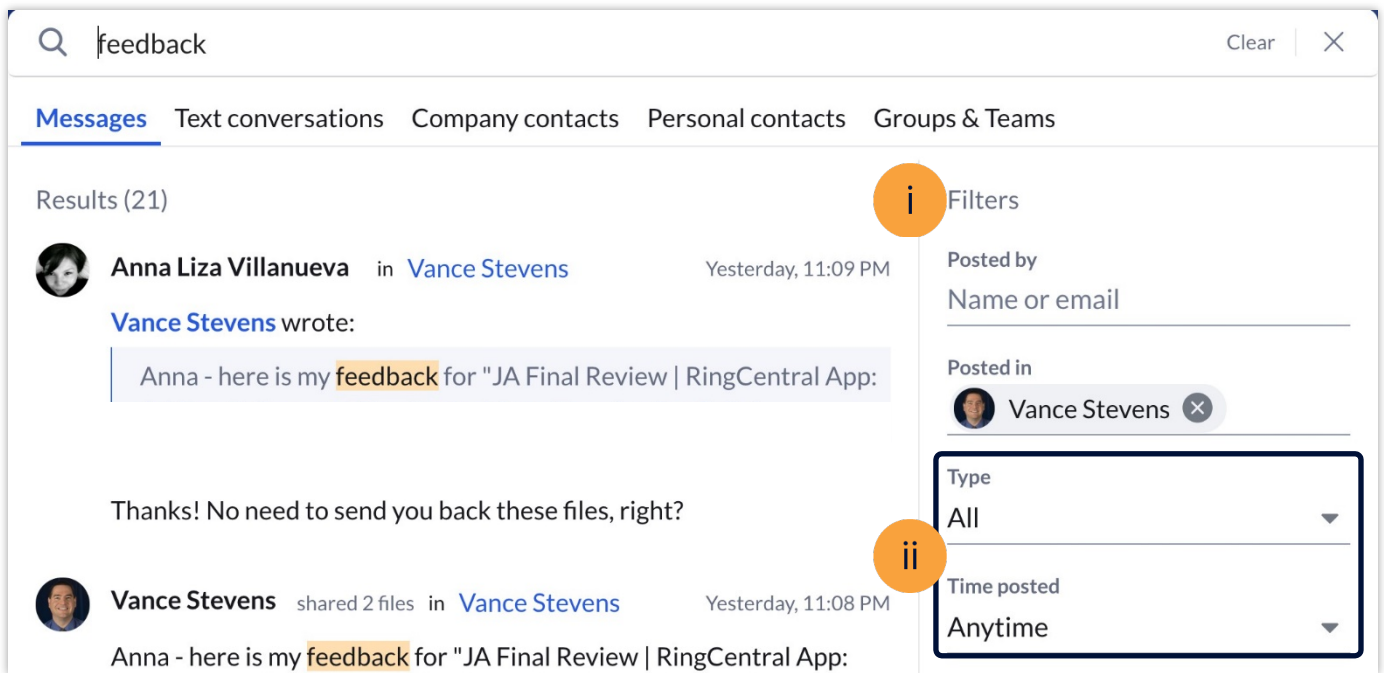
RingCentral App | Searching and Bookmarking Messages

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:

- Go to the **Filters** section to narrow your selection.
- Edit the **Type** and the **Time posted** to narrow the search results.

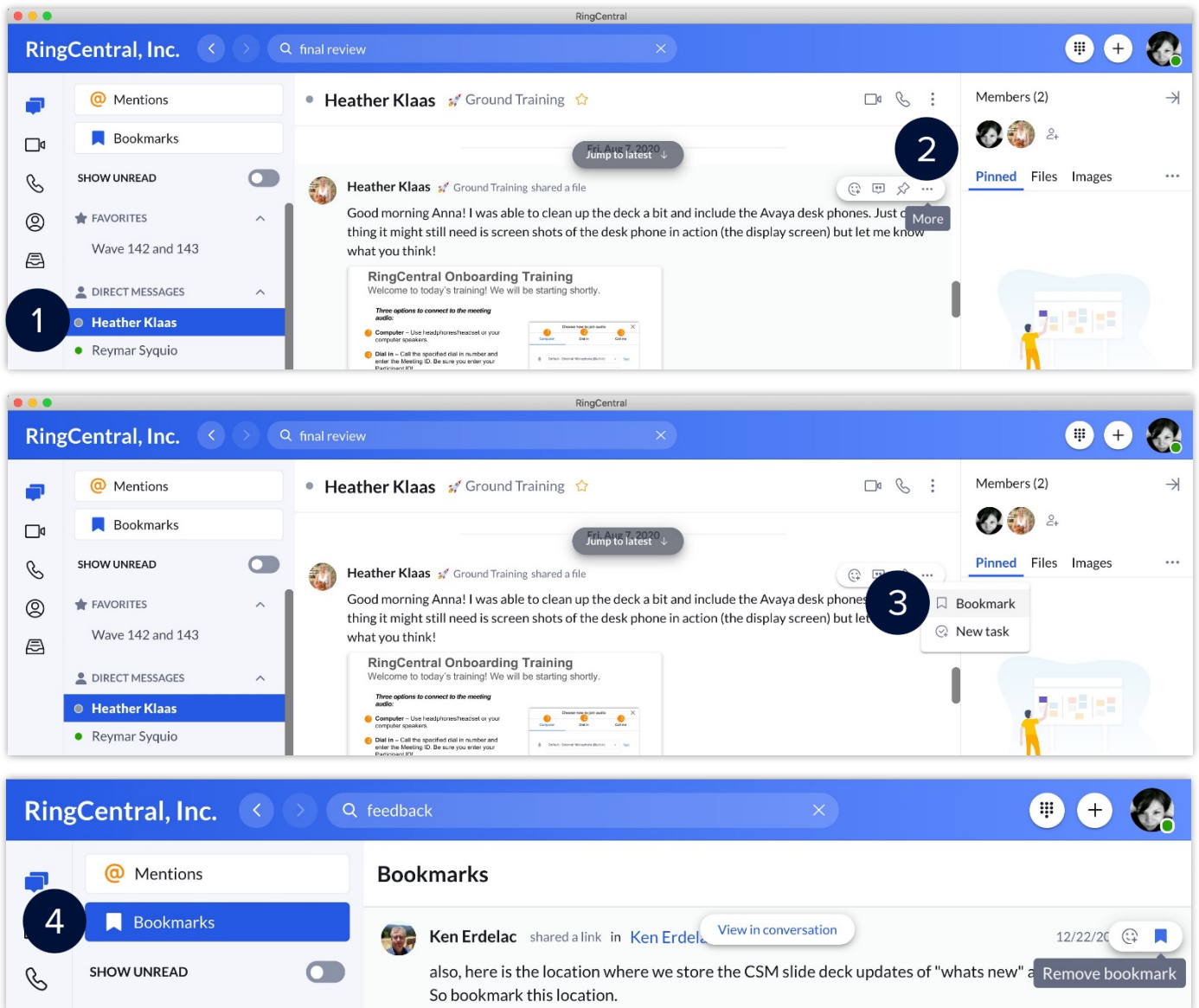


Bookmarking messages

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.

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

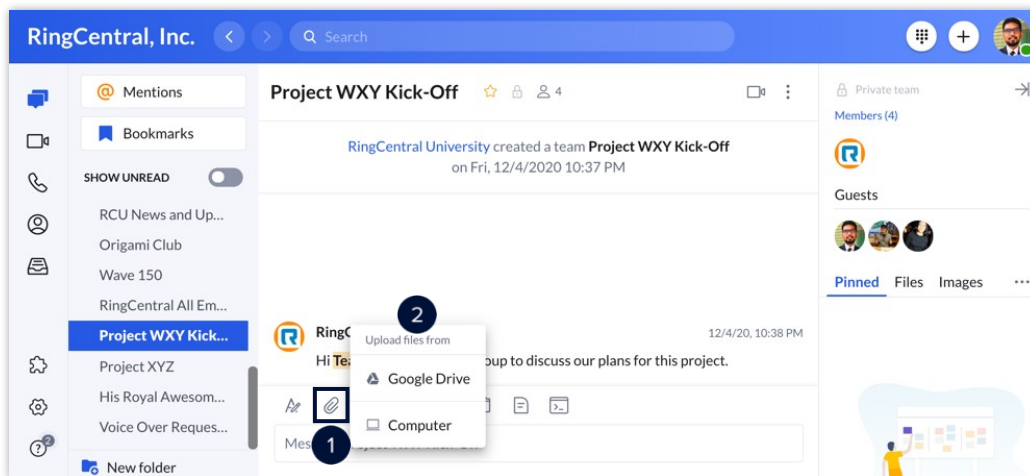


Attach a file to a message

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 **Google Drive** to upload files from cloudstorage.

You can also drag and drop files directly into a conversation from your computer.

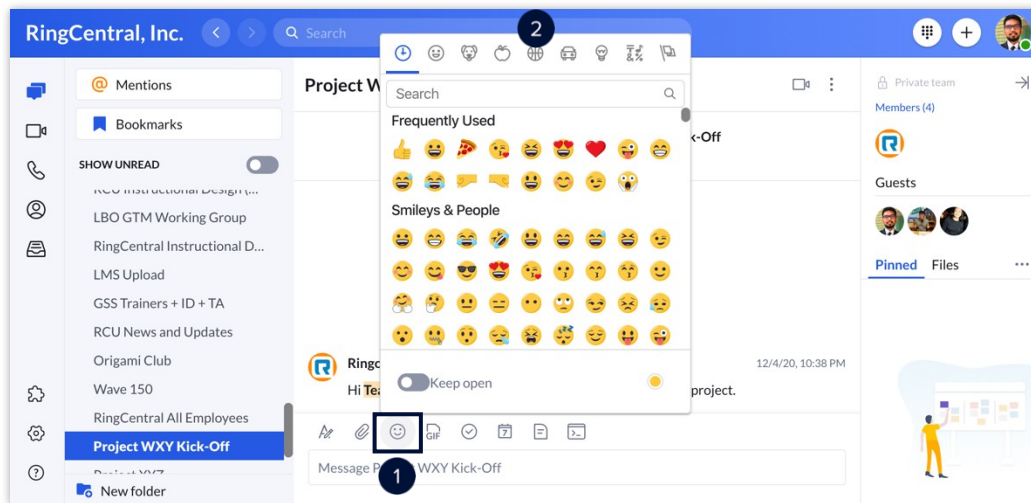


Use emoji and GIF options

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

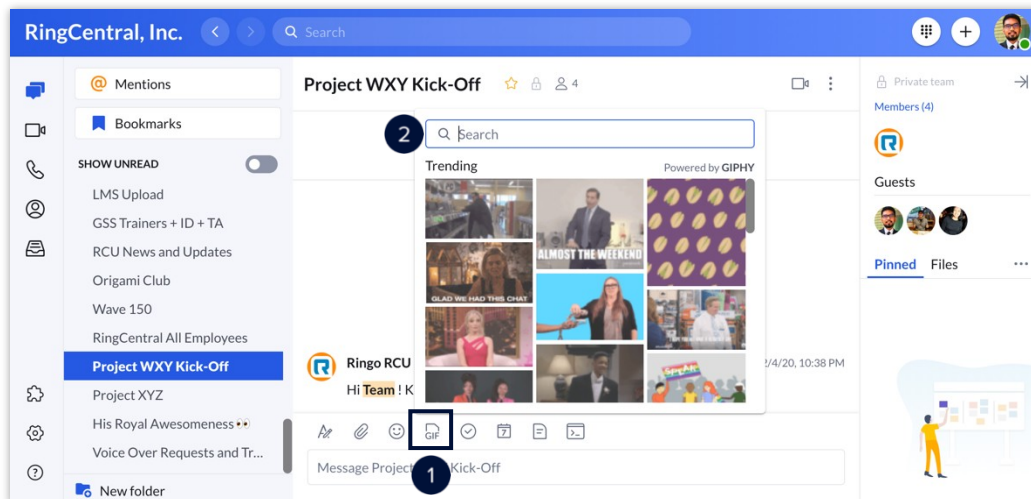
To add an emoji:

1. Click **Emoji**.
2. Select your preferred emoji.



To add a GIF:

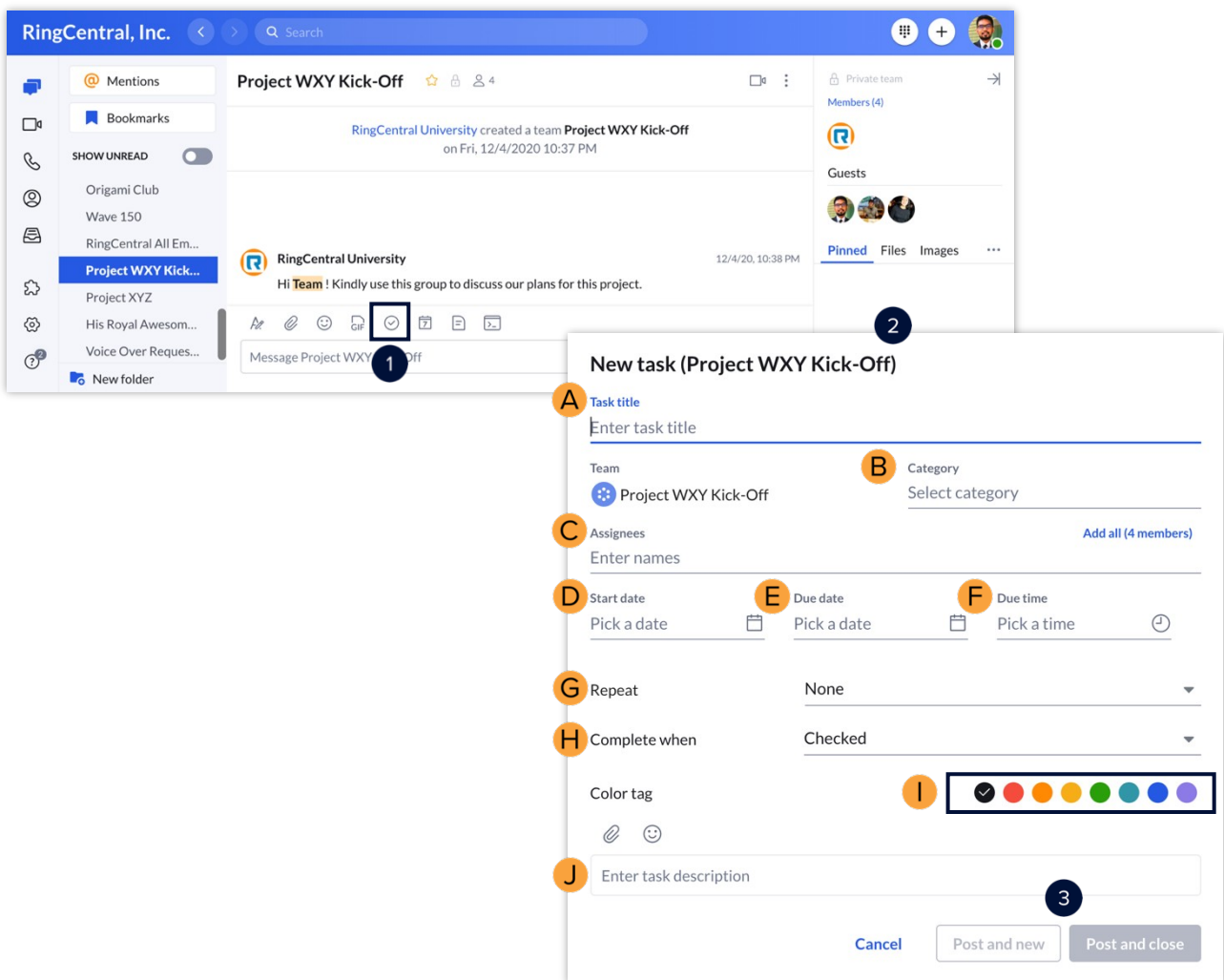
1. Click **Share a GIF**.
2. Search for GIFs using the search bar or select from the available GIFs in the preview window.



Create and assign tasks within a conversation

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

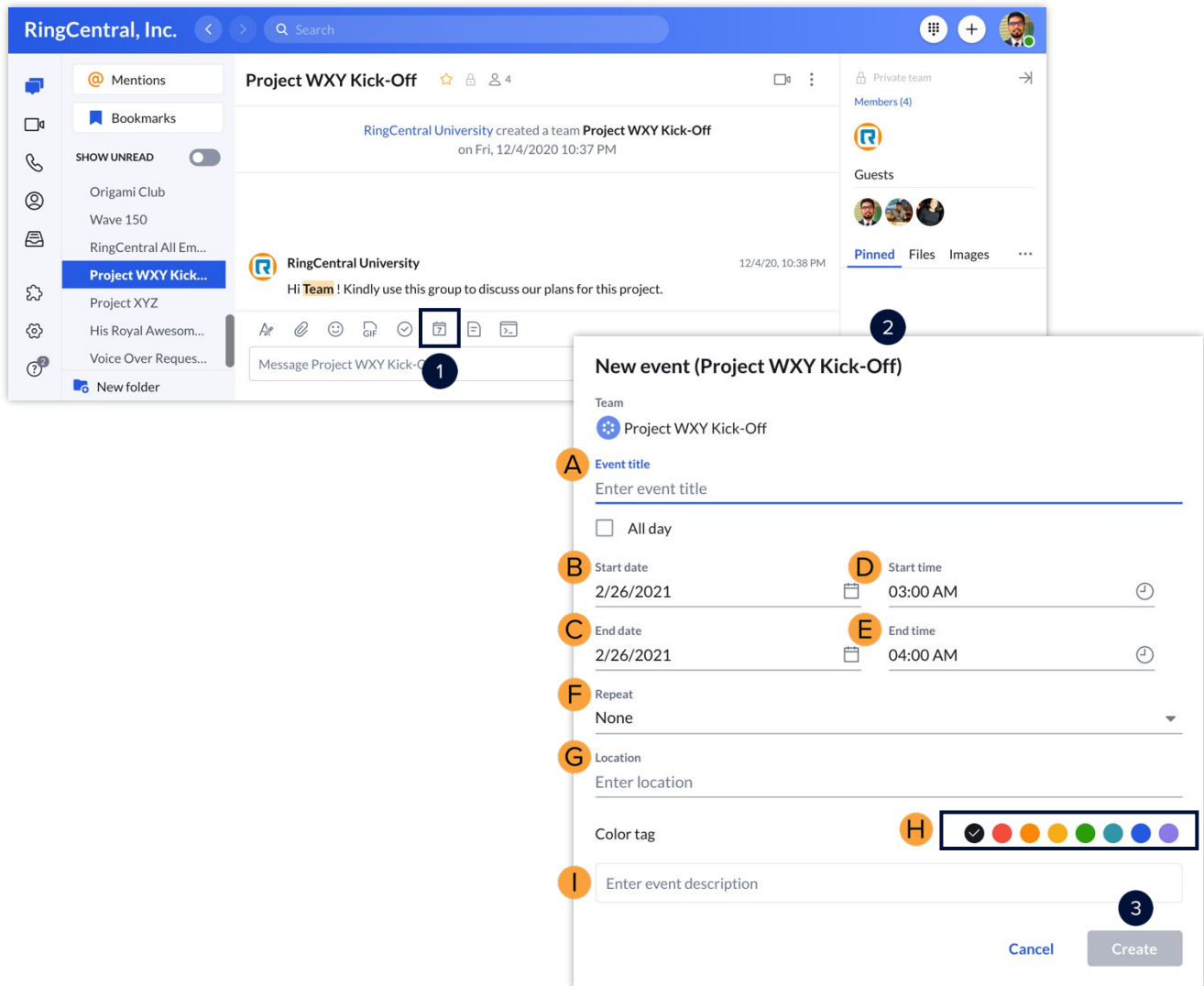
1. Click **New task**.
2. Fill out the following fields (as appropriate):
 - A. **Task title** – Enter the task name. (Required)
 - B. **Category** – Enter the task category.
 - C. **Assignees** – Set the task assignees.
 - D. **Start Date** – Set the start date.
 - E. **Due Date** – Set the due date.
 - 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.
 - K. **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.

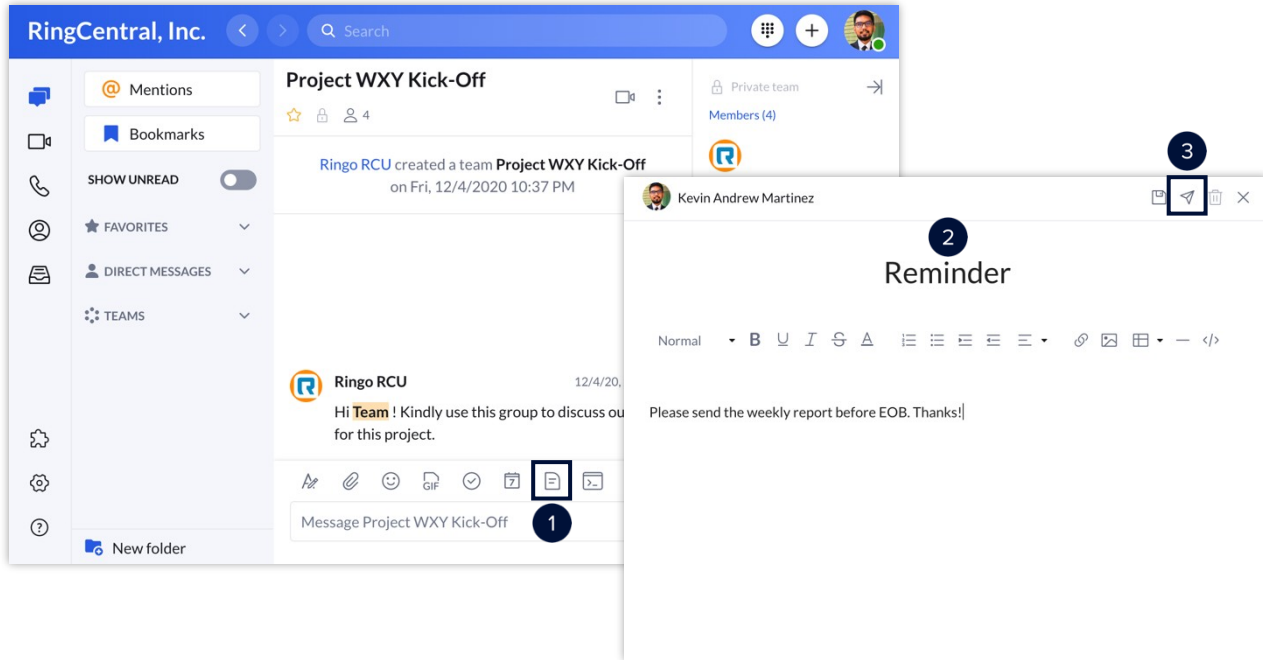
1. Click **New Event**.
2. Fill out the following fields:
 - A. **Event title** – Enter the task name.
 - B. **Start date** – Set the start date.
 - C. **End date** – Set the end date.
 - D. **Start time** – Set the start time.
 - E. **End time** – Set the end time.
 - F. **Repeat** – Set the event reoccurrence.
 - 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

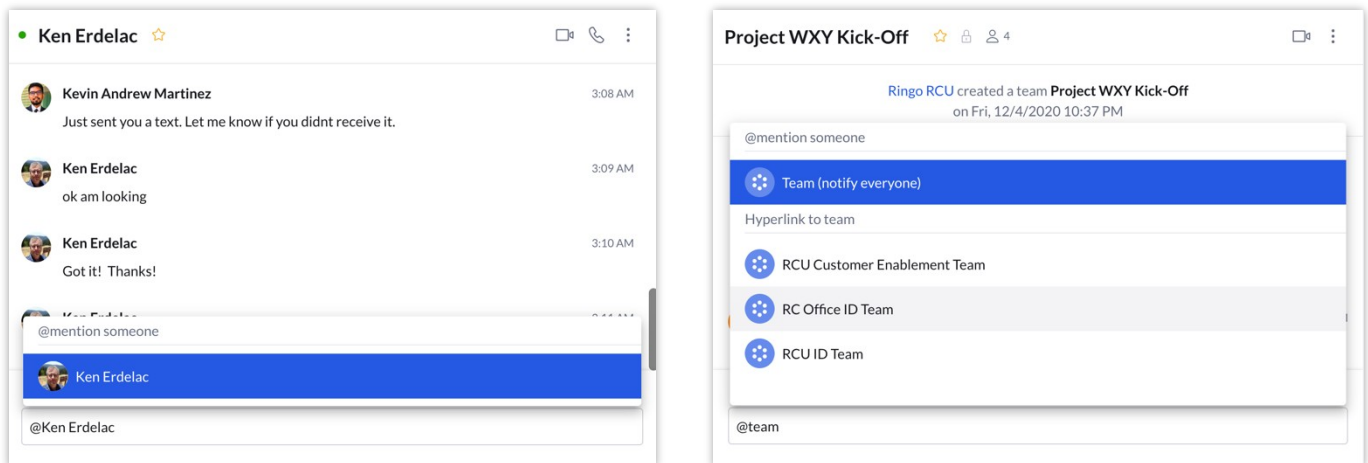
Use notes to draft and post relevant information that everyone in the conversation can edit.

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.

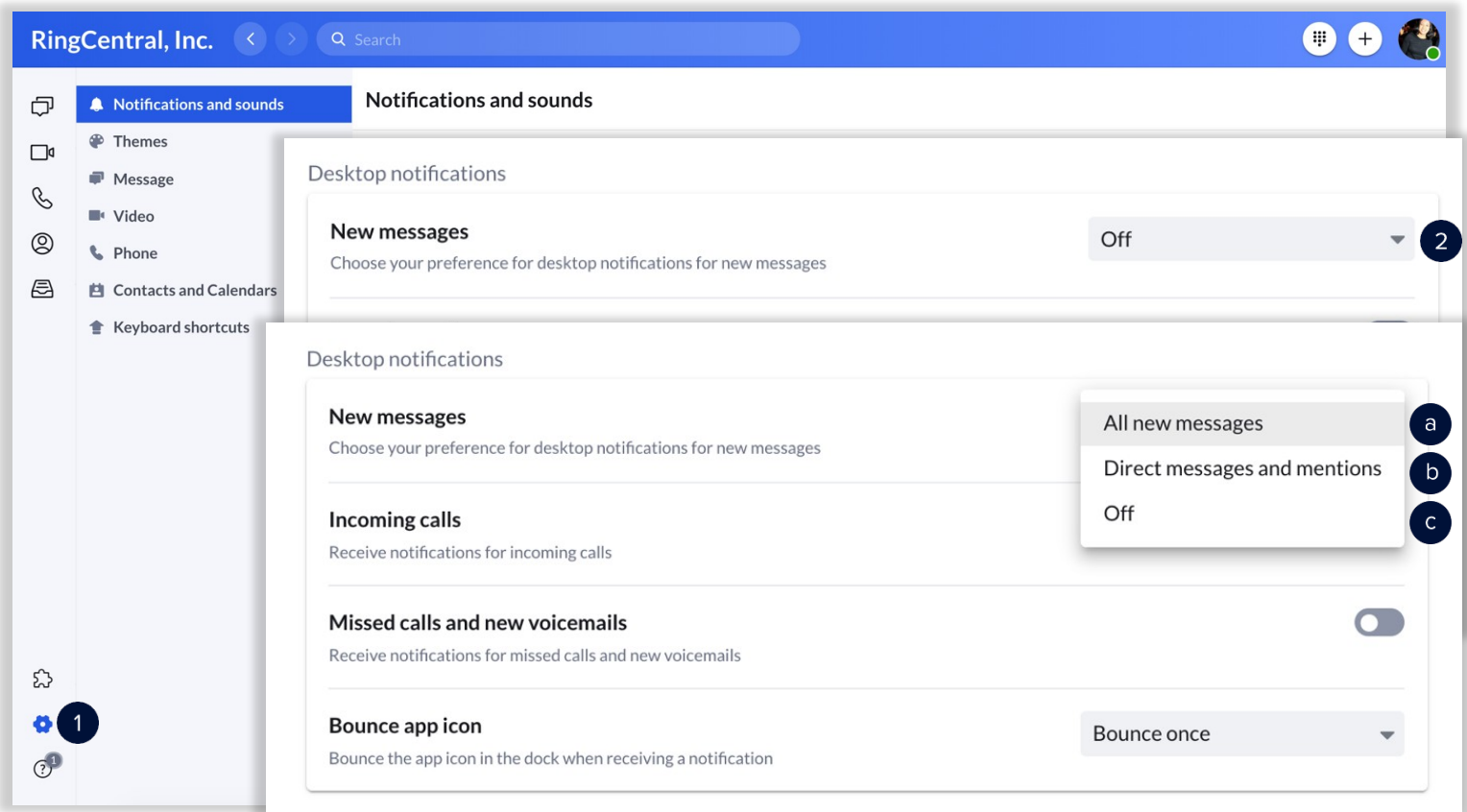


RingCentral App: Updating Conversation Preferences

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.

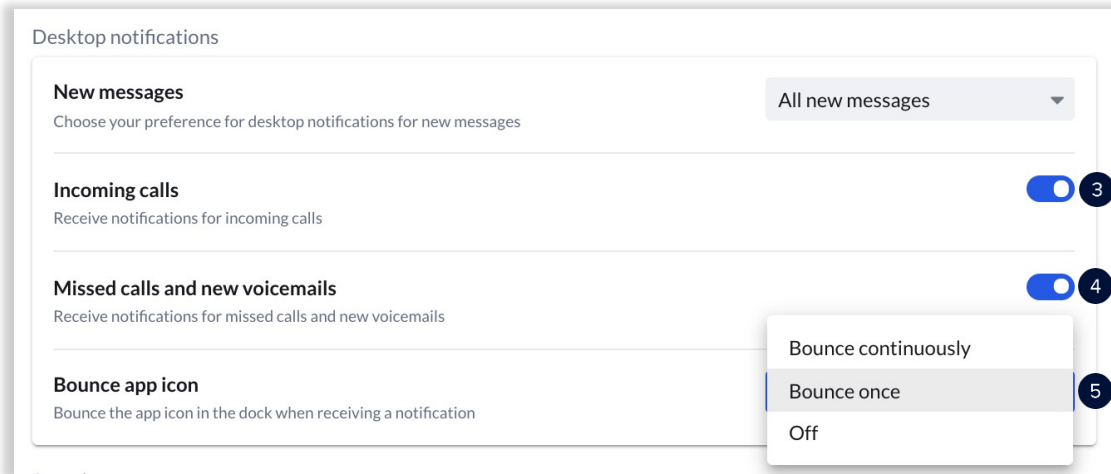
Updating conversation preferences

1. Click **Settings**.
2. Under Notifications and sounds, 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.

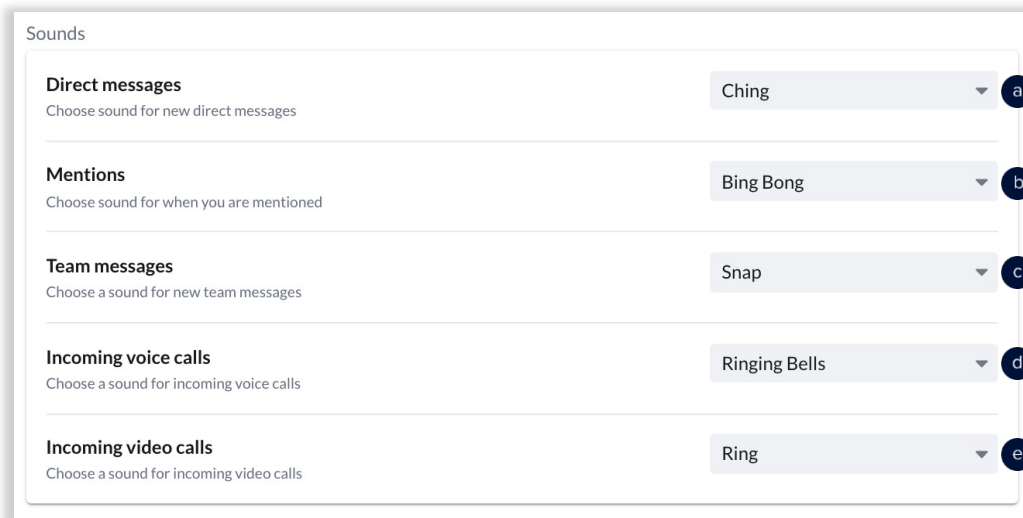


RingCentral App | Updating Conversation Preferences

3. Activate **Incoming calls** to get notified when someone calls you.
4. Turn on **Missed calls and new voicemails** to get notified when you miss a call, or someone leaves a voicemail.
5. 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.



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



RingCentral App | Updating Conversation Preferences

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

The screenshot shows the 'Email notifications' settings page in the RingCentral App. It is divided into three sections: 'Direct messages', 'Mentions', and 'Teams'. A dropdown menu is open for the 'Direct messages' section, showing options: 'Every 15 minutes', 'Every hour' (highlighted), and 'Off'. A callout '7' points to the 'Every hour' option. The 'Mentions' section has a toggle switch that is turned on, with a callout '8' pointing to it. The 'Teams' section has a dropdown menu set to 'Every hour', with a callout '9' pointing to it.

Email notifications

Direct messages
Receive email notifications for direct messages

Mentions
Receive email notifications for when you are mentioned

Teams
Receive email notifications for team messages

Every 15 minutes
Every hour
Off

Every hour

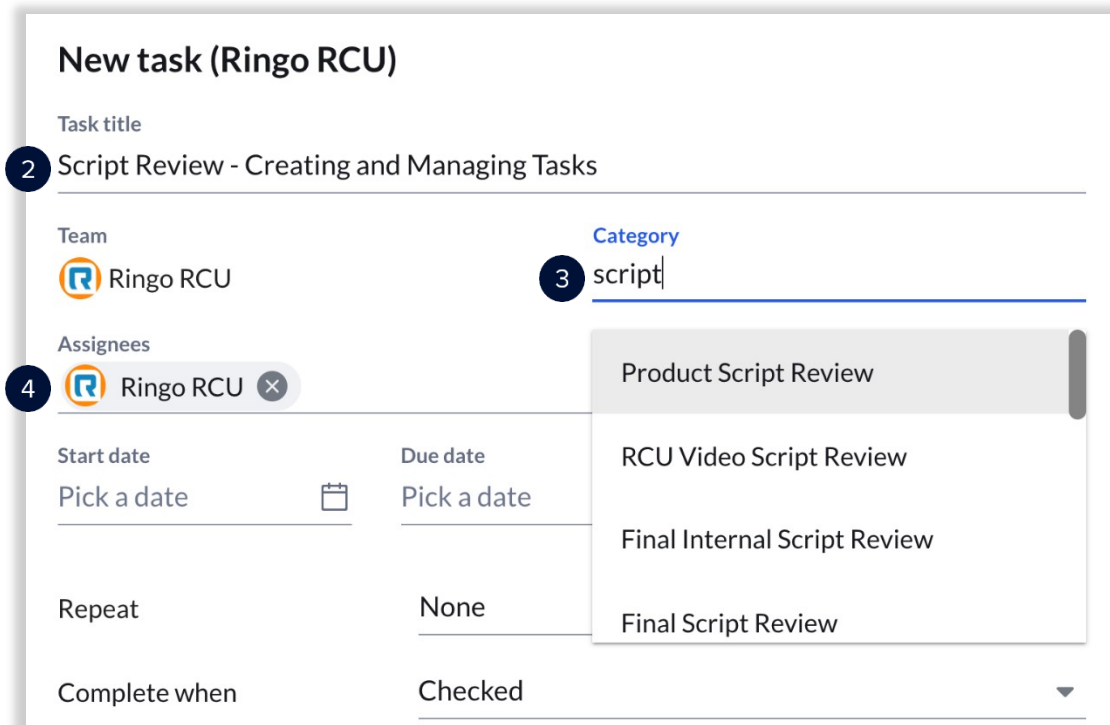
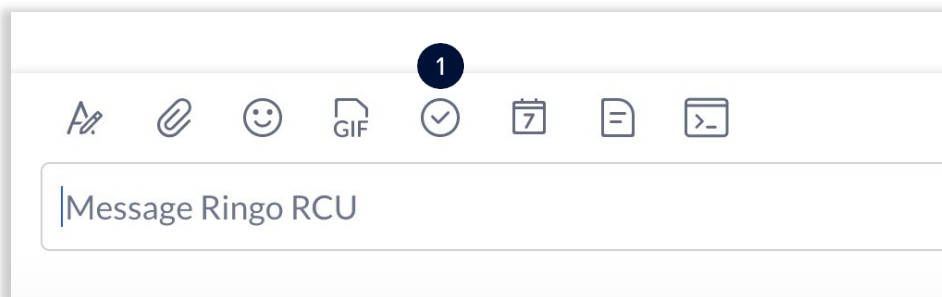
RingCentral App: Creating and Managing Tasks

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 task to one or more team members.



RingCentral App | Creating and Managing Tasks

5. Enter a start date, due date, and due time.
6. Select the task recurrence.
7. Choose how you want the task completed:
8. **Checked** – Any one of the assignees can mark the task as complete.
9. **Checked by all assignees** – All assigned members check the task for it to complete.
10. **100% done** – Task can be marked by incremental percentages until it is complete.
11. Assign a color tag. Use this option for easier identification when you have multiple tasks.
12. Click **Attach** to attach a file.
13. Complete the task description.
14. Click **Post and new** to post and create another task or **Post and close** to post and close the taskwindow.

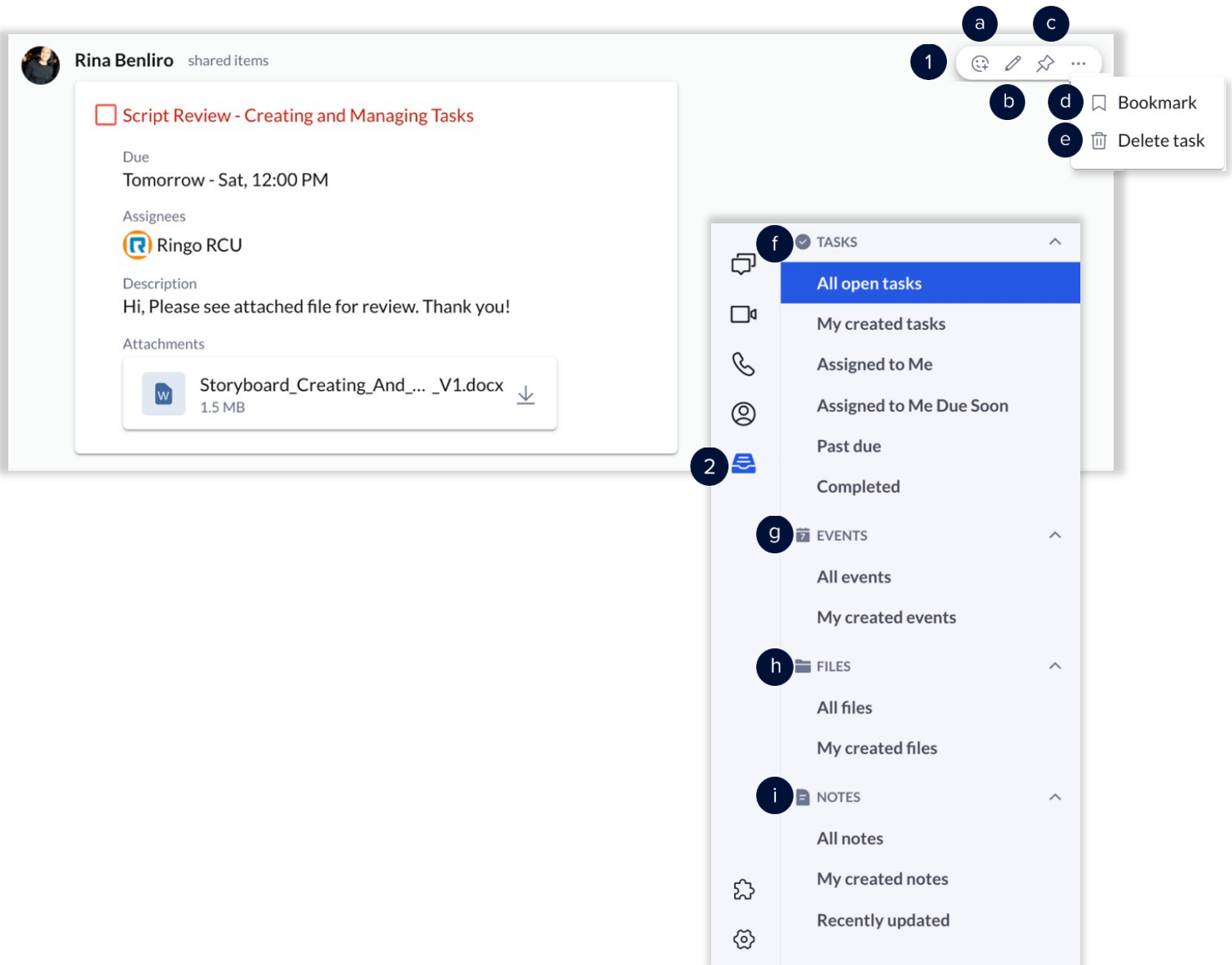
The screenshot shows the task creation interface with the following elements and callouts:

- 5**: Start date (3/12/2021), Due date (3/13/2021), and Due time (12:00 PM) fields.
- 6**: Repeat dropdown menu with options: None, Every day, Every weekday, Every week, and Every month.
- 7**: Complete when dropdown menu with options: a) Checked, b) Checked by all assignees, and c) 100% done.
- 8**: Color tag selection area with a row of colored circles (black, red, orange, yellow, green, teal, blue, purple).
- 9**: Attach icon (paperclip) and emoji icon (smiley face).
- 10**: Text input field containing "Hi, Please see attached file for review. Thank you!".
- 11**: File attachment area showing "Storyboard_Creating_And_Ma..._V1.docx" with a close icon (X).
- Bottom right: "Cancel", "Post and new", and "Post and close" buttons.

Managing a task

Follow these steps to manage a task:

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



RingCentral App: Using Personal Folders

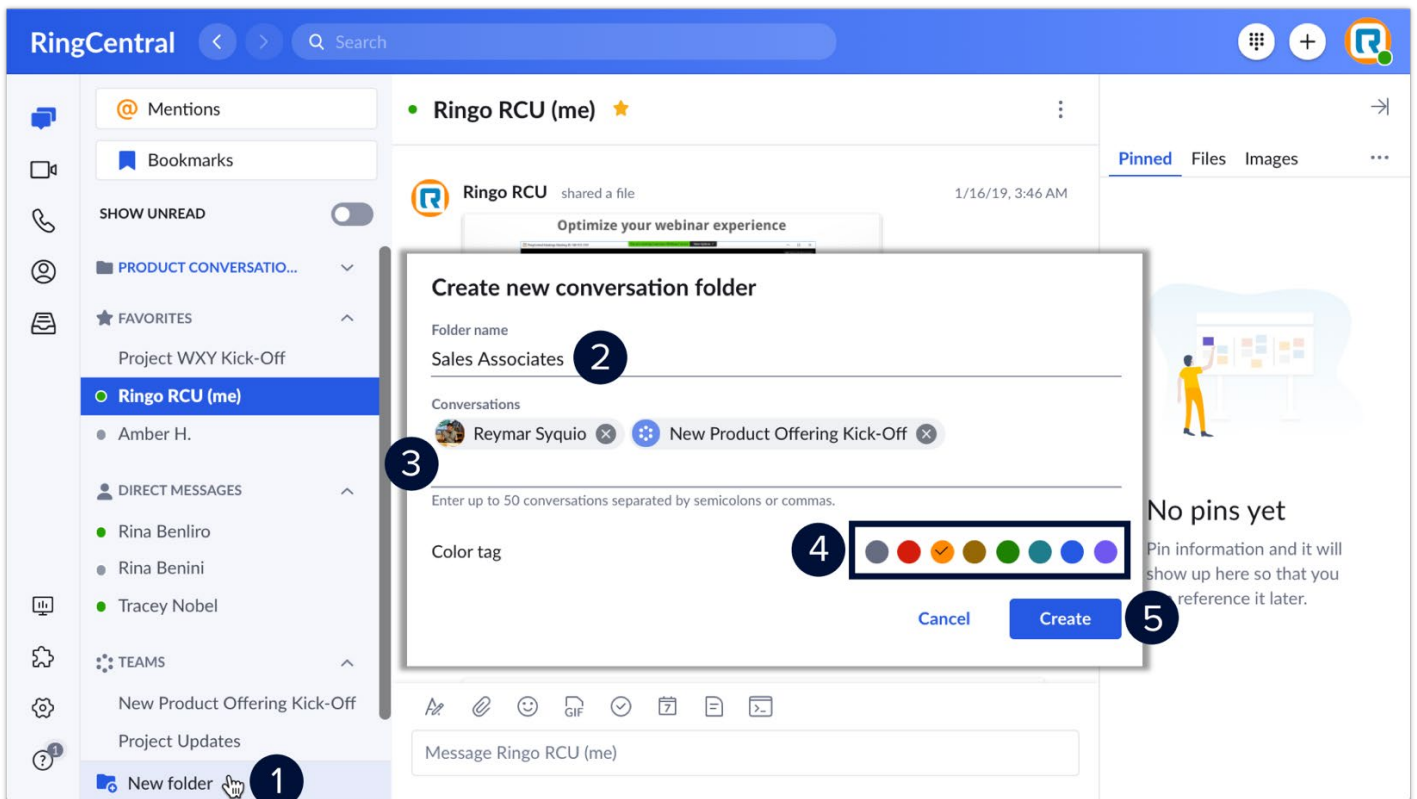
The RingCentral app allows you to create personal folders to sort your messaging conversations, helping you easily access the right conversations by giving you the power to arrange them in folders that you label.

This quick guide covers how to use this feature.

Creating a new personal folder

Follow these steps to create a new Personal Folder:

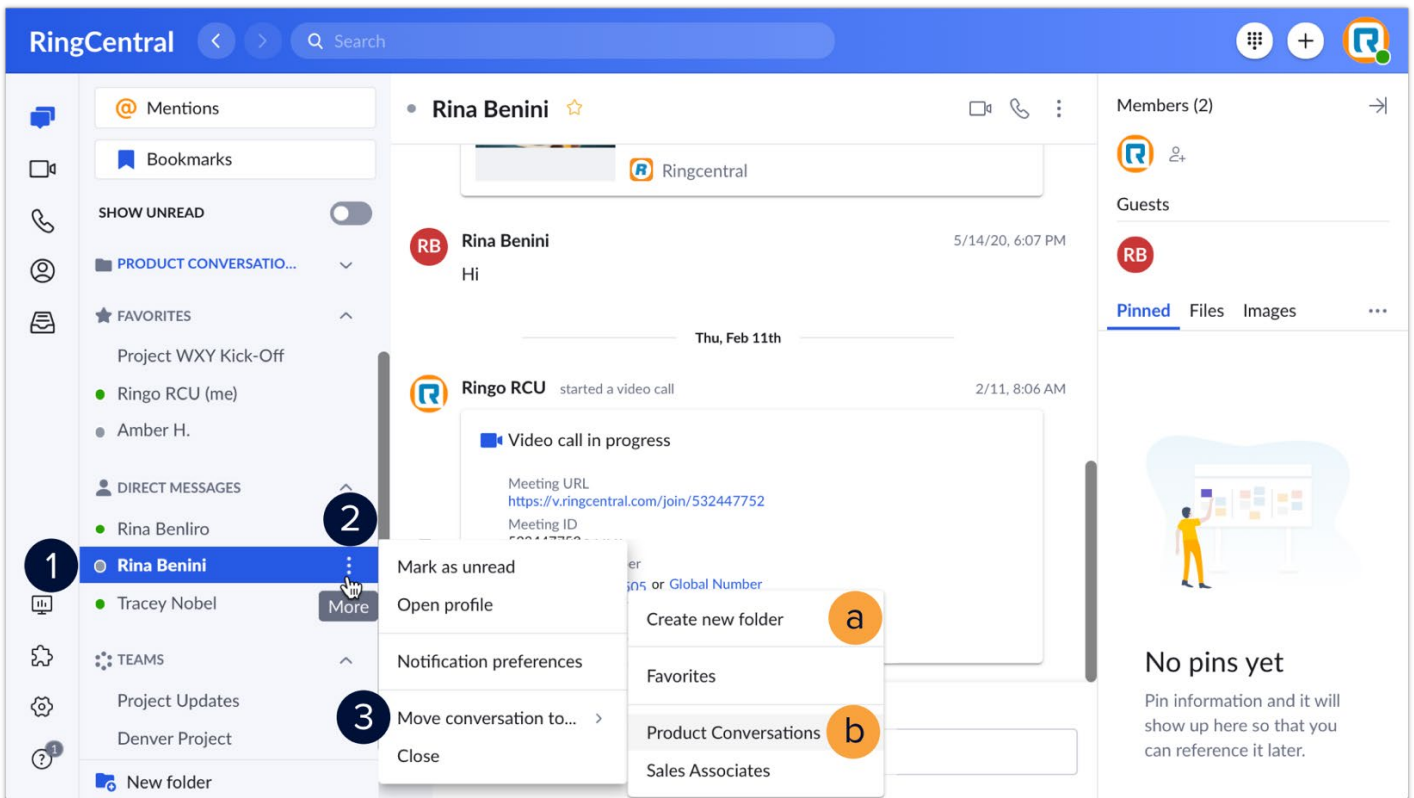
1. Click New Folder.
2. Type your preferred **Folder name**.
3. Type the names of the individual, group, or team conversations you want to include in this folder.
4. Select a **Color tag** for this Personal Folder; this helps you easily identify it.
5. Click **Create** to finish.

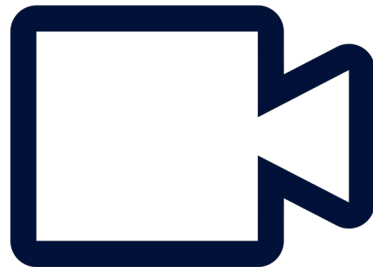


Moving a conversation to a personal folder

You can freely move any of your individual, group, or team conversations to a new or existing PersonalFolder. 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.



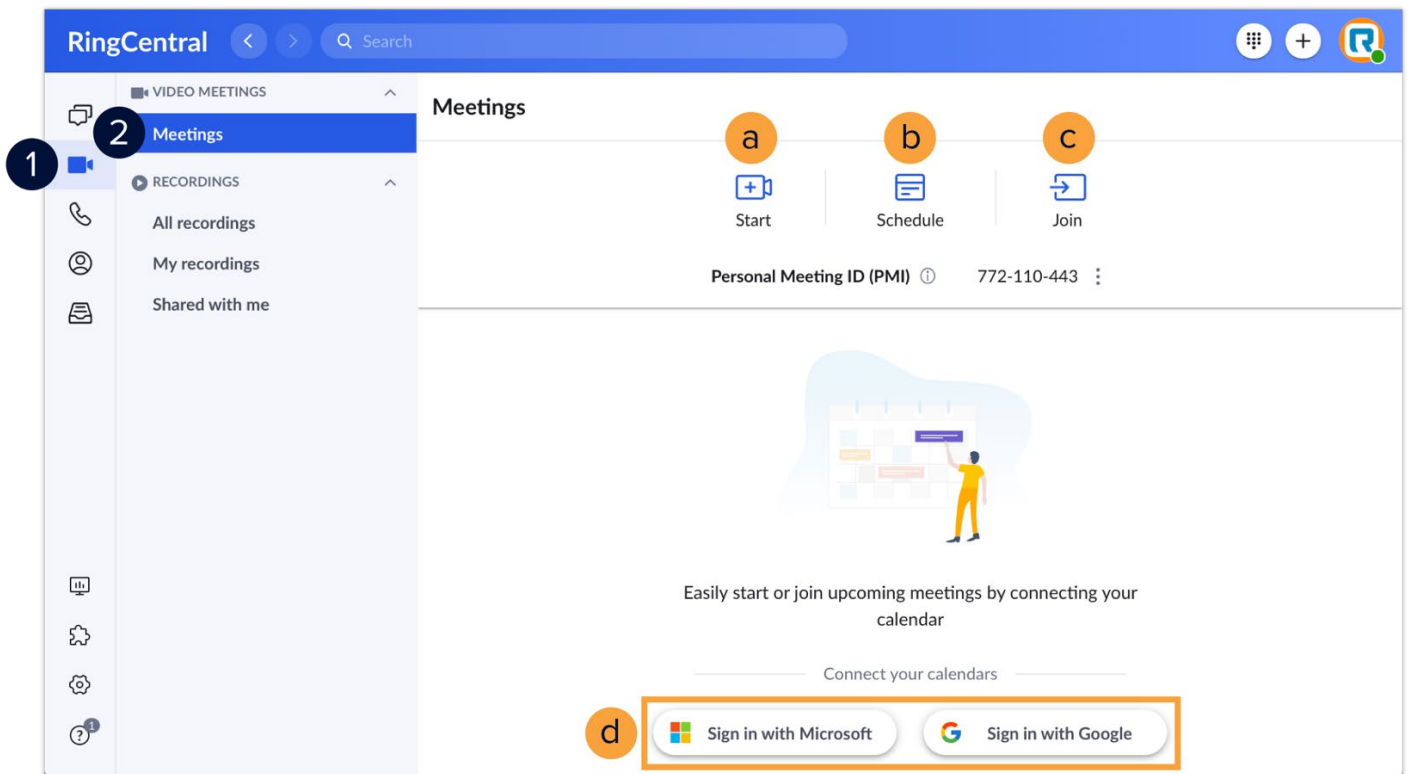


Video

RingCentral App: Video Meetings Basics

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

1. Click **Video**.
2. Select **Meetings** to display the options within RingCentral Video.
 - a. **Start** – Starts a RingCentral Video meeting with you as the host.
 - b. **Schedule** – Allows you to schedule a RingCentral Video meeting for a later, while providing you with the options to configure the meeting settings.
 - c. **Join** – Lets you join a RingCentral Video meeting using a meeting ID or link.
 - d. **Sign in with Microsoft / Google** – Prompts you to log in to your Microsoft or Google account and lets you synchronize your calendar with the RingCentral app to display your upcoming meetings and calendar events.



RingCentral Video: Scheduling Through the Microsoft Outlook Add-In

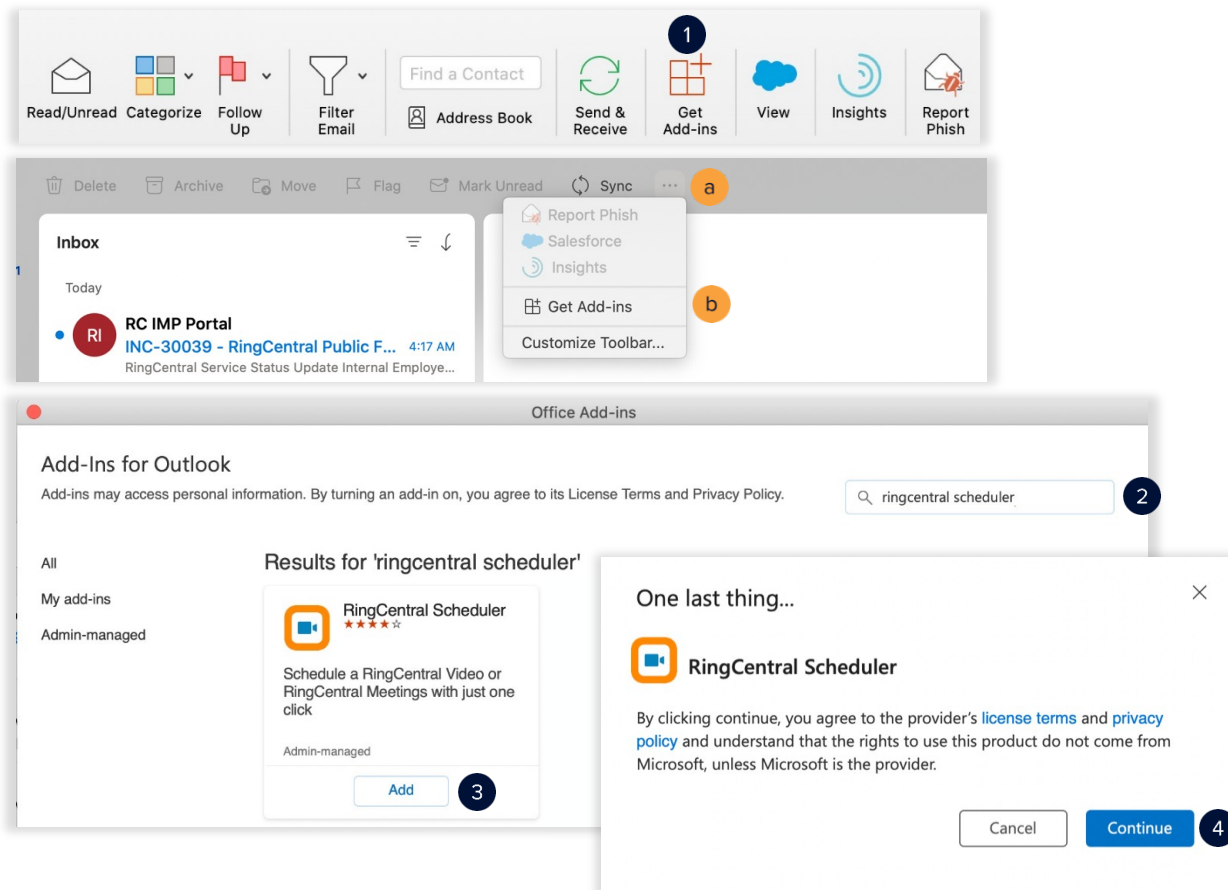
The RingCentral Scheduler Outlook add-in makes scheduling RingCentral Video sessions in Outlook easy. With this Outlook add-in, you can quickly add a meeting to any new or existing calendar event.

This add-in is only available to RingCentral users with Microsoft Outlook

Installing the RingCentral Scheduler add-in

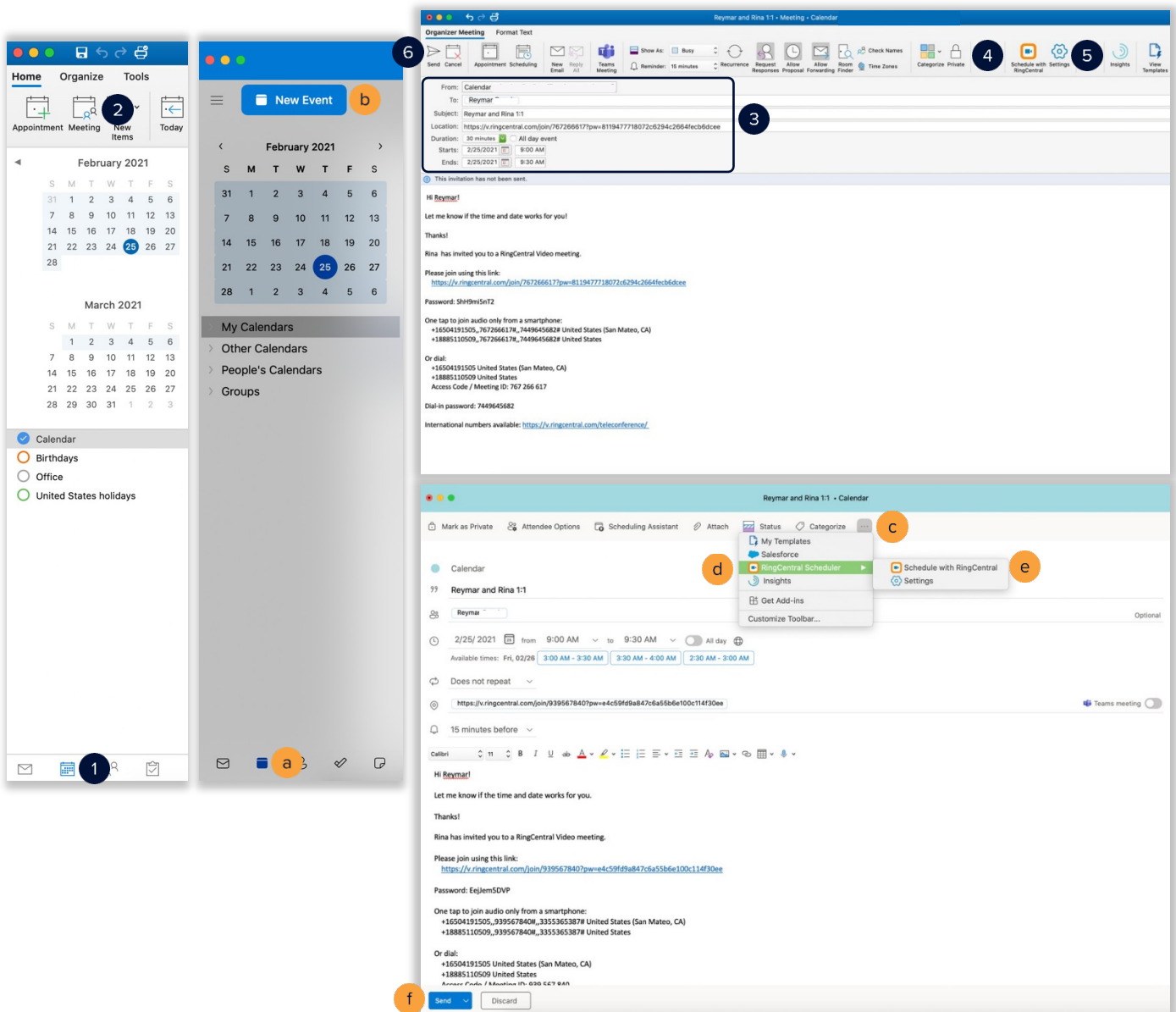
Follow the steps below to integrate the RingCentral Scheduler to your Outlook account:

1. Open the Outlook desktop or the web application and click **Get Add-ins**.
 - a. If you are using the new Microsoft Outlook interface, click the **More** icon.
 - b. Select **Get Add-ins**.
2. Type "RingCentral Scheduler" in the search bar.
3. Click **Add**.
4. Click **Continue** to begin the installation.



Scheduling a meeting using the RingCentral Scheduler Add-In

1. Access your Outlook calendar.
2. Click **Meeting**.
 - a. If you are using the new Microsoft Outlook interface, click **Calendar**.
 - b. Click New Event.
3. Complete the meeting invite details.
4. Click Schedule with RingCentral.
5. Click **Settings** to customize your meeting invite. This is optional.
6. Click **Send**.
 - c. If you are using the new Microsoft Outlook interface, click the **More icon**.
 - d. Hover over RingCentral Scheduler.
 - e. Select Schedule with RingCentral.
 - f. Click **Send**.



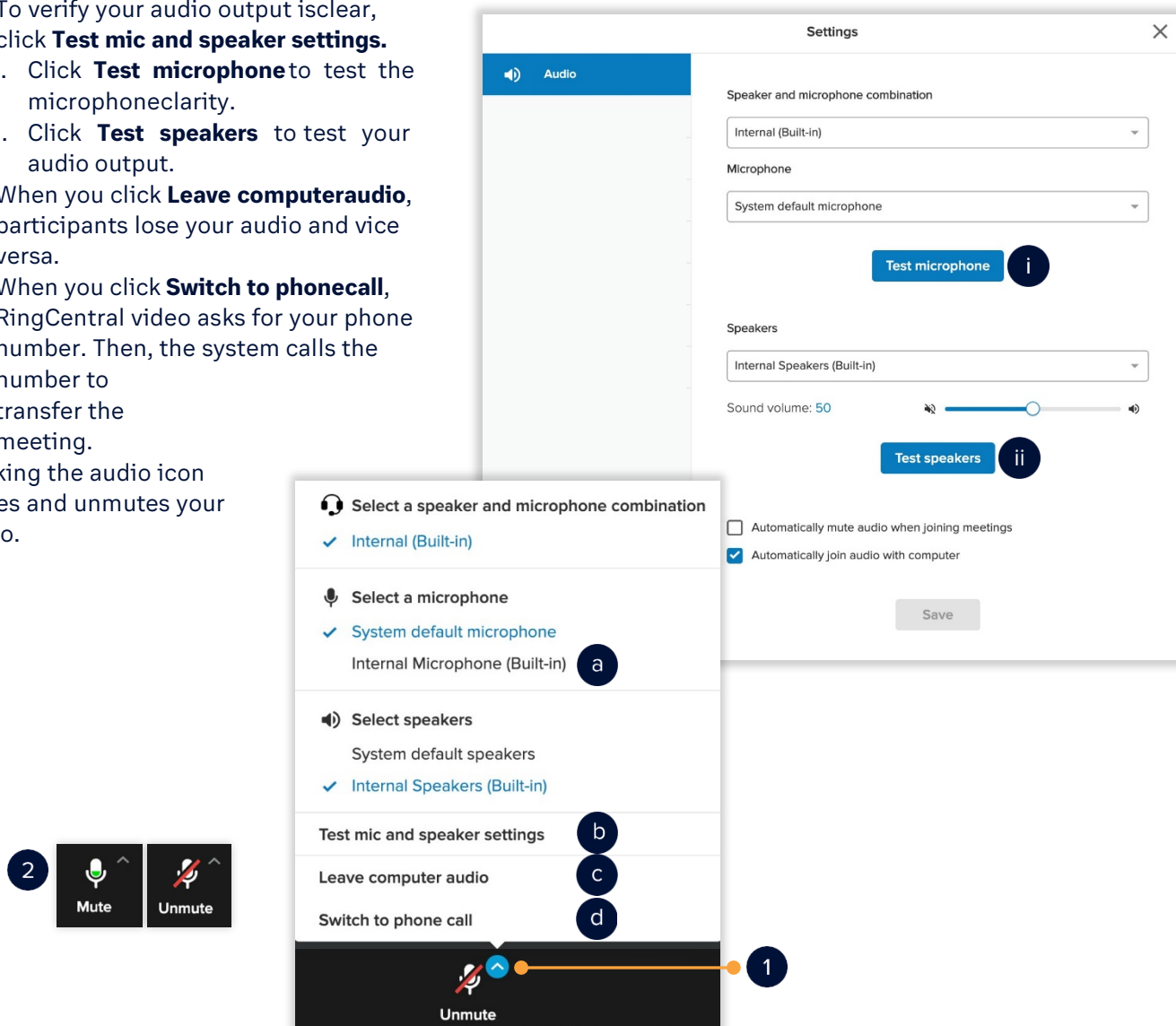
RingCentral Video: Avoiding Audio, Video, and Screen Sharing Pitfalls

RingCentral gives you the option to control the audio, video, and screen sharing settings.

Avoiding audio pitfalls

Check your audio source.

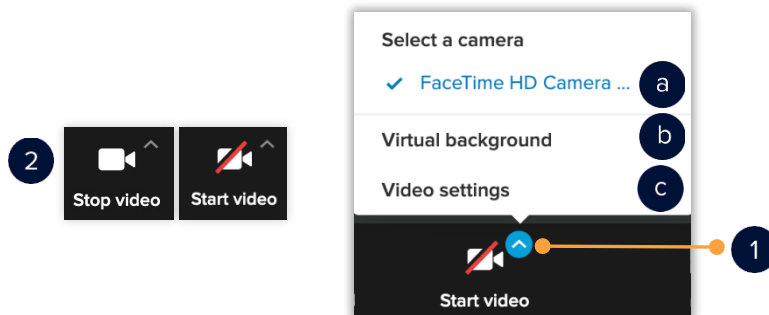
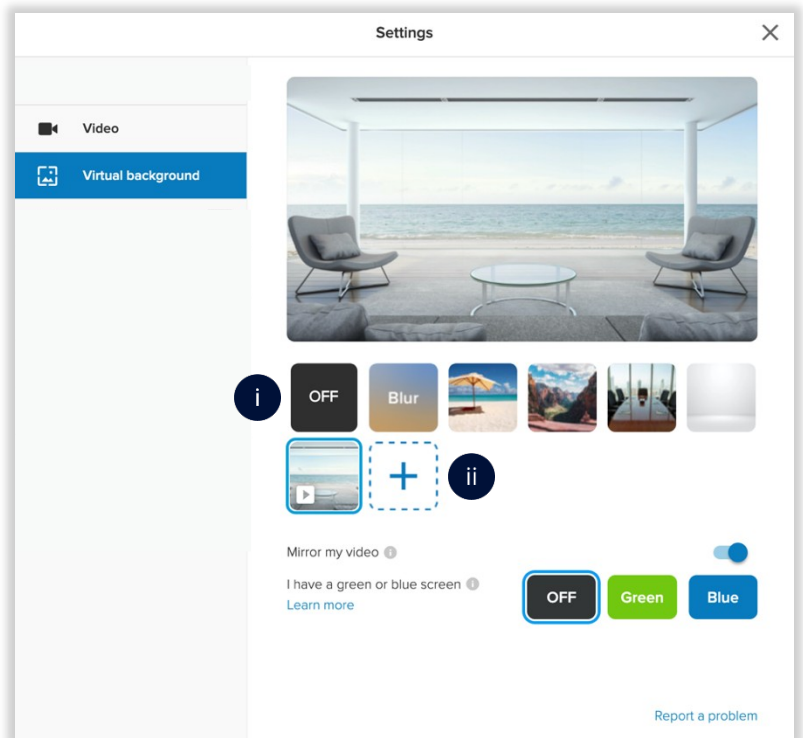
1. To check audio source, click the **audio settings** button.
 - a. Verify your preferred audio source is selected.
 - b. To verify your audio output is clear, click **Test mic and speaker settings**.
 - i. Click **Test microphone** to test the microphone clarity.
 - ii. Click **Test speakers** to test your audio output.
 - c. When you click **Leave computeraudio**, participants lose your audio and vice versa.
 - d. When you click **Switch to phonecall**, RingCentral video asks for your phone number. Then, the system calls the number to transfer the meeting.
2. Clicking the audio icon mutes and unmutes your audio.



Avoiding video pitfalls

Check your video source.

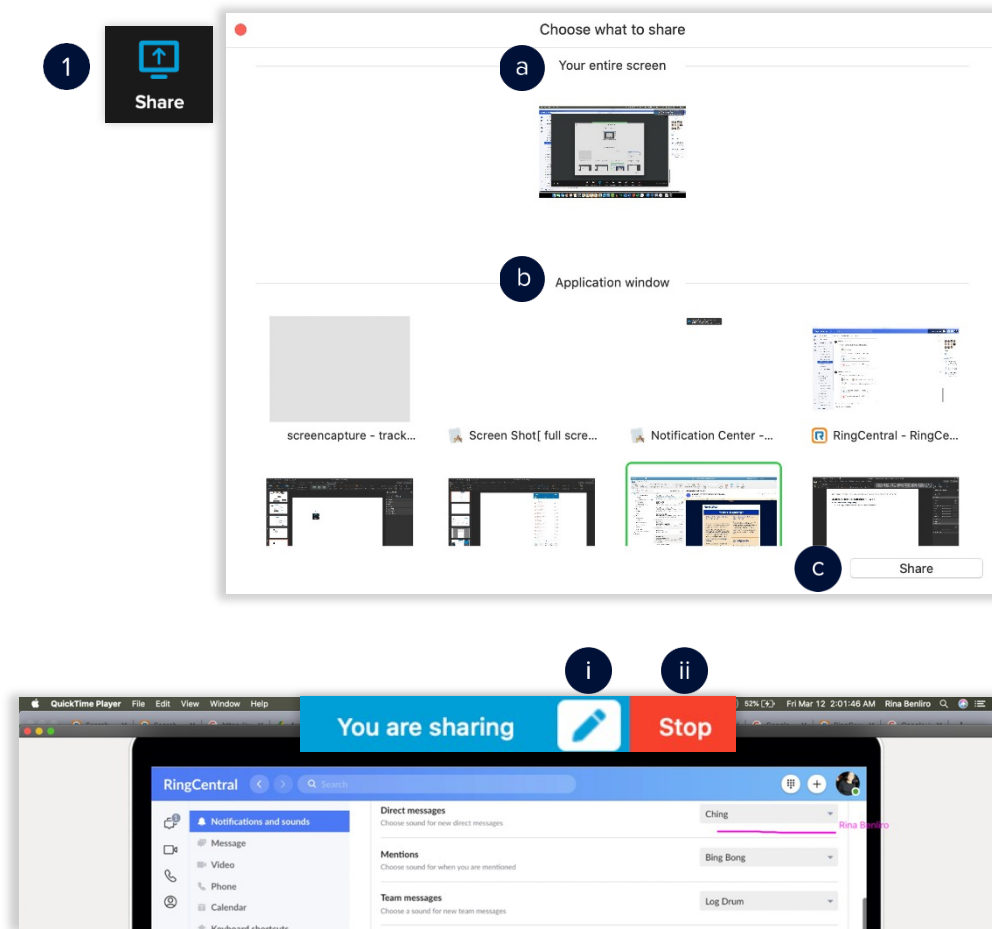
1. To verify the video source, click the **video settings** button.
 - a. Verify your preferred videosource is selected.
 - b. Clicking **Virtual background** enables your virtual background screen.
 - i. Select from the defaultvideo backgrounds.
 - ii. Click the **Upload** button to upload anadditional image or video as your virtual background.
 - c. To check your video settings and clarity, click **Video settings**.
2. Clicking the video icon turns video on and off.



Avoiding screen sharing pitfalls

Check your screen sharing settings.

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.
 - b. Application window – Only the application or file that is open is shared. The green border indicates which application or file is about to be shared.
 - c. Once you have selected what to share, click **Share**.
 - i. While sharing, you have the option to annotate. Click **Enable/Disable Annotations**. Enabling annotations gives your participants the ability to annotate on what you are sharing.
 - ii. Click **Stop** to stop screen sharing.



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.

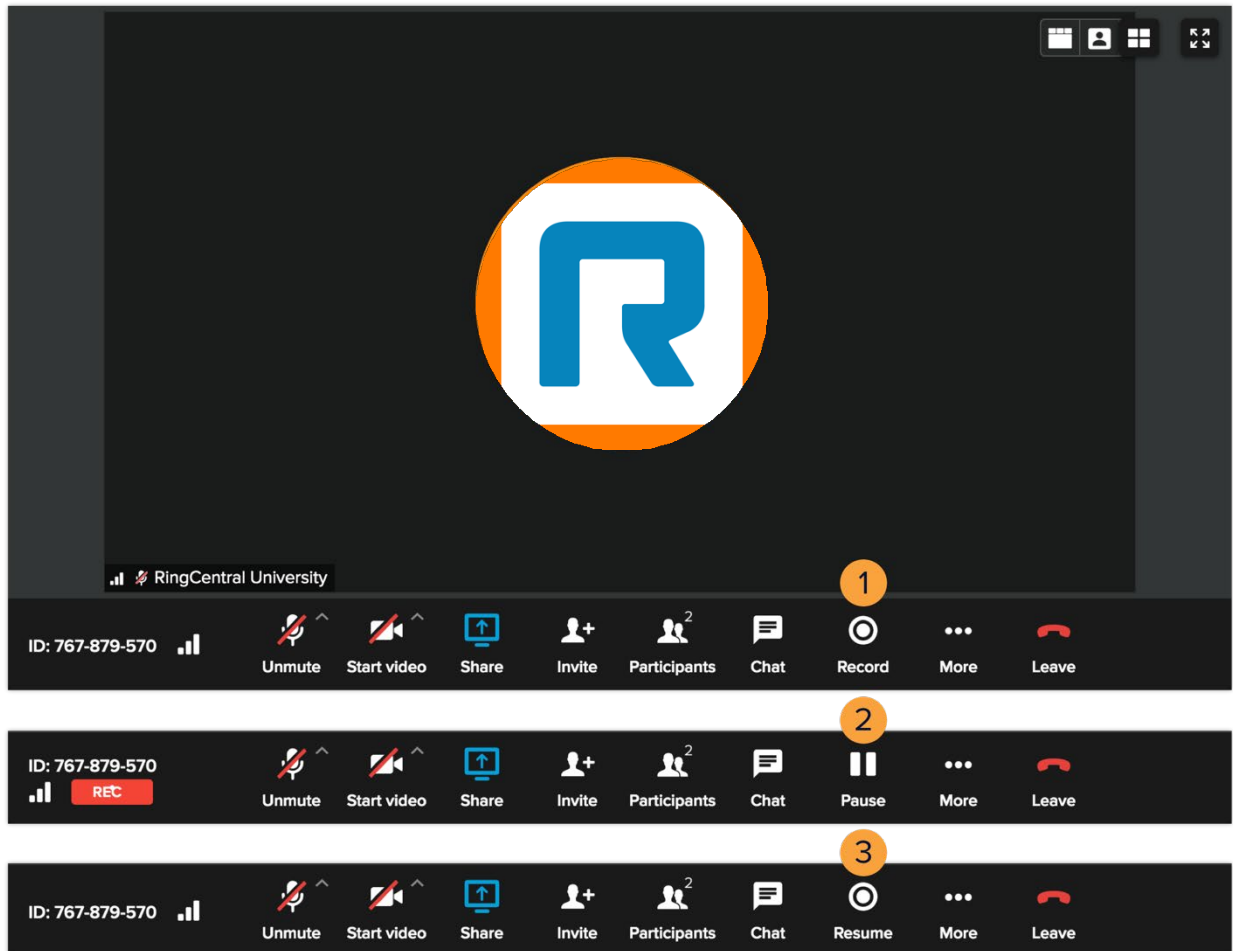
Recording video meetings

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

1. Click **Record** to start recording the video meeting.
2. If necessary, you can 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.

The ability to record is only available to the video meeting host and participants who have been assigned as moderators.



Accessing video meeting recordings in the RingCentral App

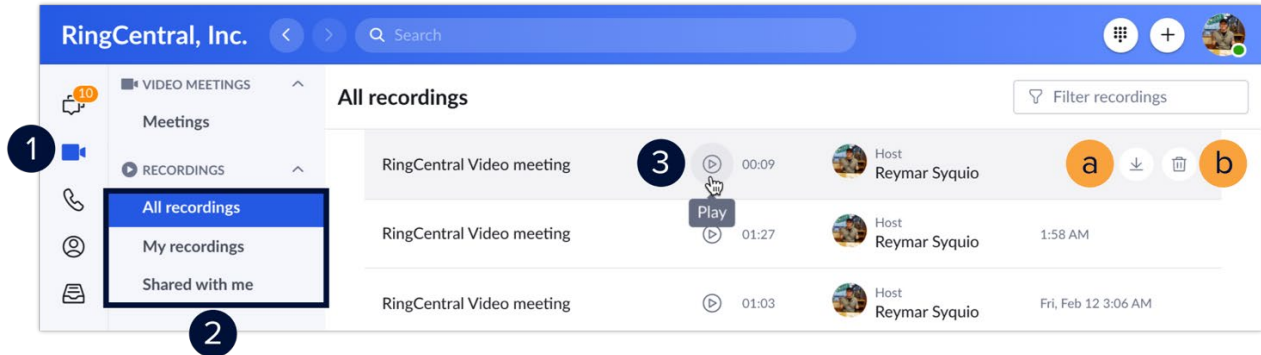
You can access your recorded video meetings in the RingCentral app by following these steps:

1. Click **Video**.
2. Select your preferred list of recordings.
3. Select a specific video meeting recording and press **Play** to view it.

You can also choose the following options:

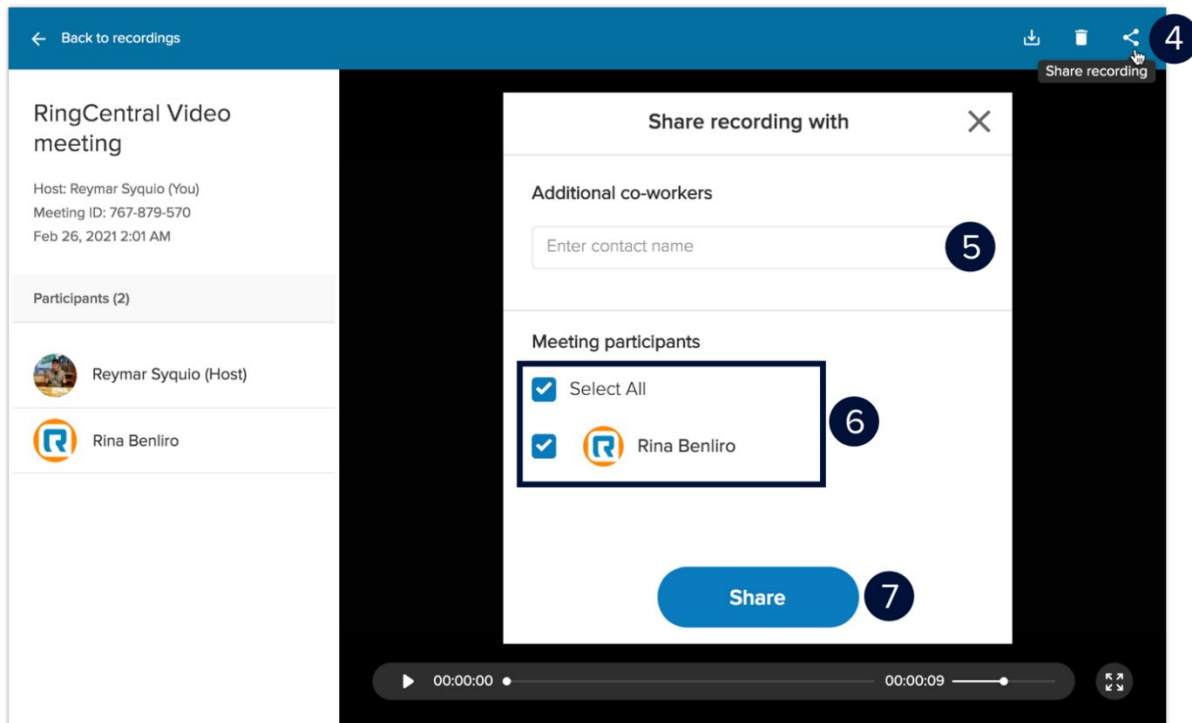
- a. **Download** – Downloads the video meeting recording to local storage.
- b. **Delete** – Deletes the selected recording and removes it from all shared contacts.

A new window displays after clicking **Play**, this allows you to view the video meeting details and play the recording.



You can also share recordings to other contacts by following these steps:

4. Click **Share** recording.
5. If you want to share the recording to contacts that didn't participate in the meeting, type their names in the **Additional co-workers** field.
6. Select the names of meeting participants to share this recording.
7. Click **Share** to finish.



RingCentral Video: Switching Video Meetings Between Mobile and Desktop

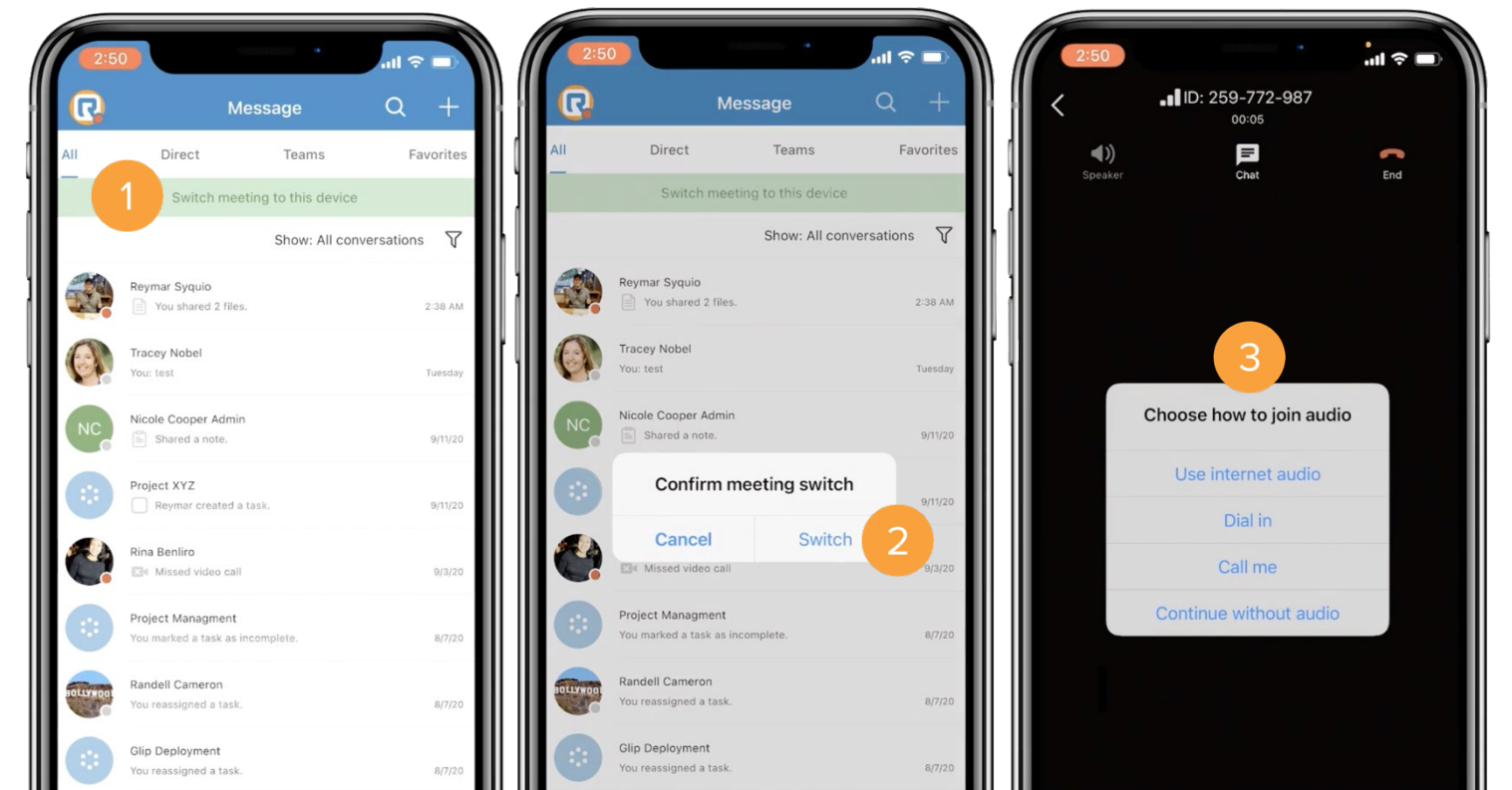
RingCentral video lets you switch between your smartphone and computer or vice versa, without disconnecting from the video meeting, allowing you to multitask with ease.

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 meeting from your computer to smartphone

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

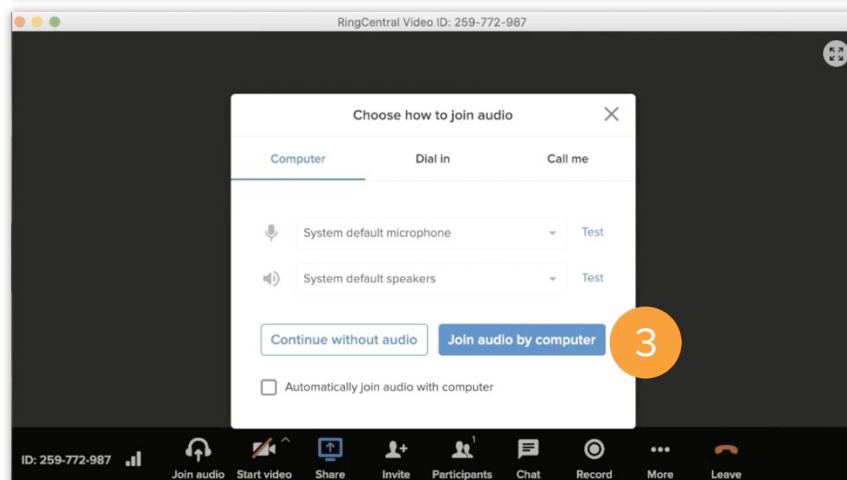
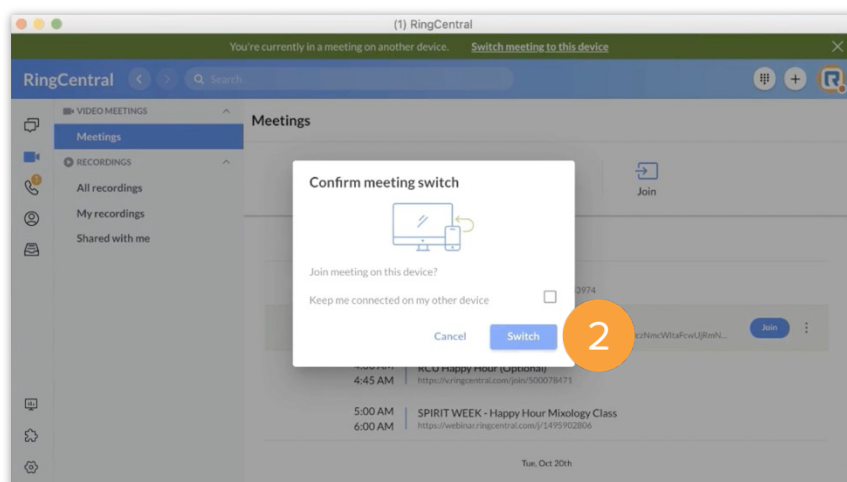
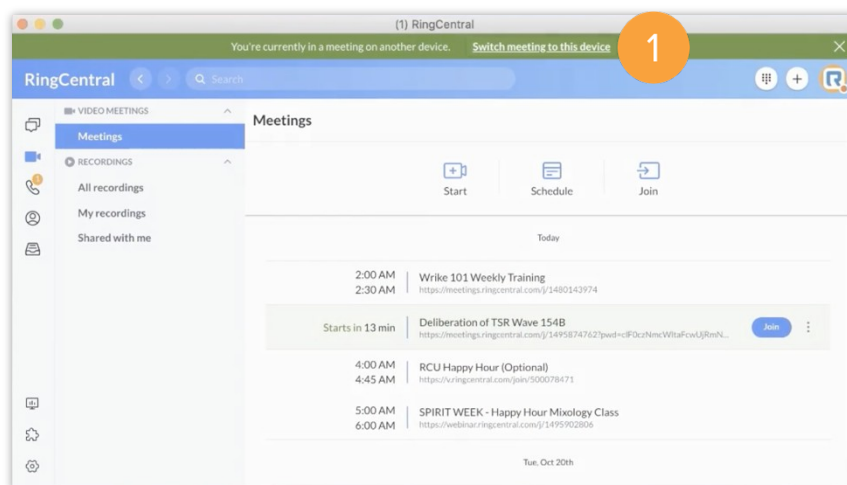
1. Tap **Switch meeting to this device.**
2. Tap **Switch.**
3. Choose how to join audio



Switch video meeting from your smartphone to computer

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

1. Click **Switch meeting to this device**.
2. Click **Switch**.
3. Choose how to join audio.

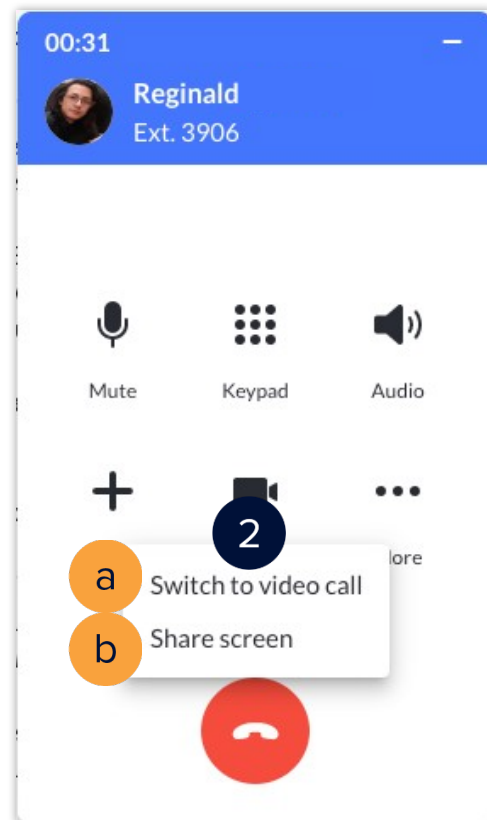
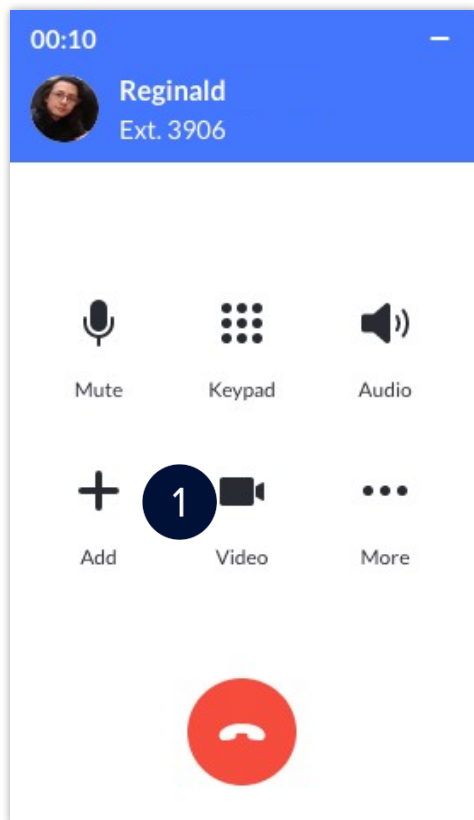


RingCentral App: Using the Call to Video Feature

The RingCentral app's Call to Video feature allows you to quickly switch from a voice or an 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. To do this, use the following steps:

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 automatically join as video meeting participants.
 - b. **Share screen** - You are switched from the call to an active RingCentral Video meeting with the screen sharing selection window automatically activated. You can then start sharing your screen with the video meeting participants, once you have selected the appropriate screen to share.

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

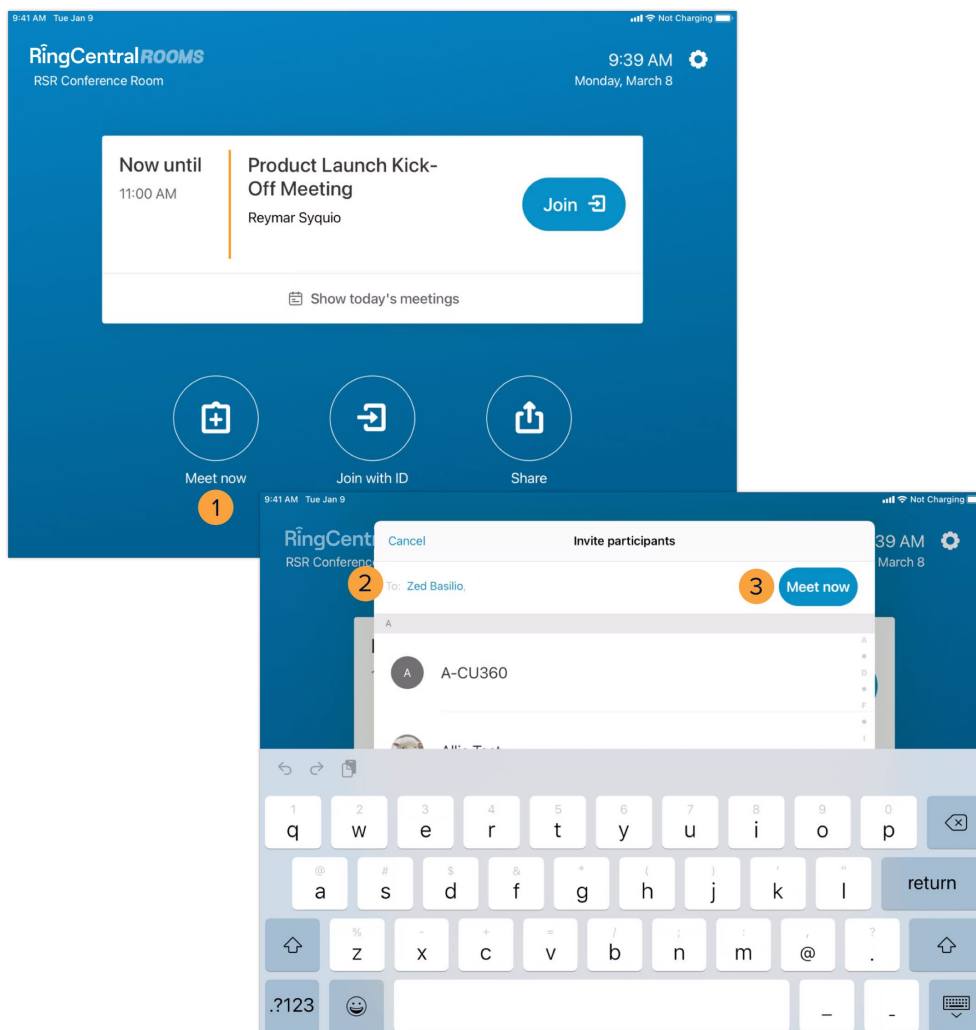
Hosting and joining video meetings using your RingCentral Rooms system is quick and easy. This job aid gives an overview of these processes.

Hosting video meetings

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

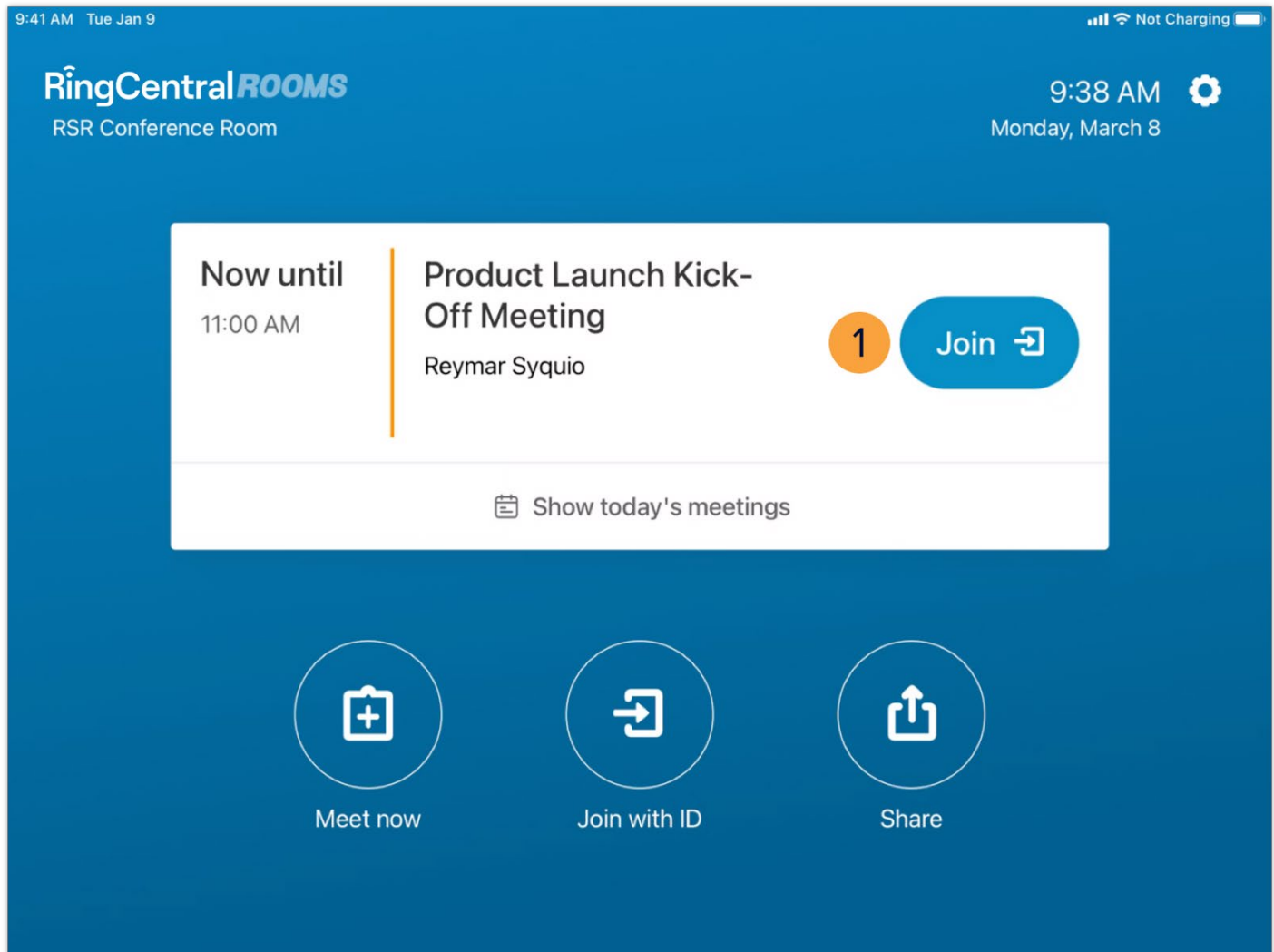
1. In your Rooms Controller, press the **Meet Now** icon.
2. Type the names of the contacts to invite to your video meeting. All invited participants must be included on your RingCentral contacts list.
3. Press the **Meet Now** button to start the video meeting.

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.



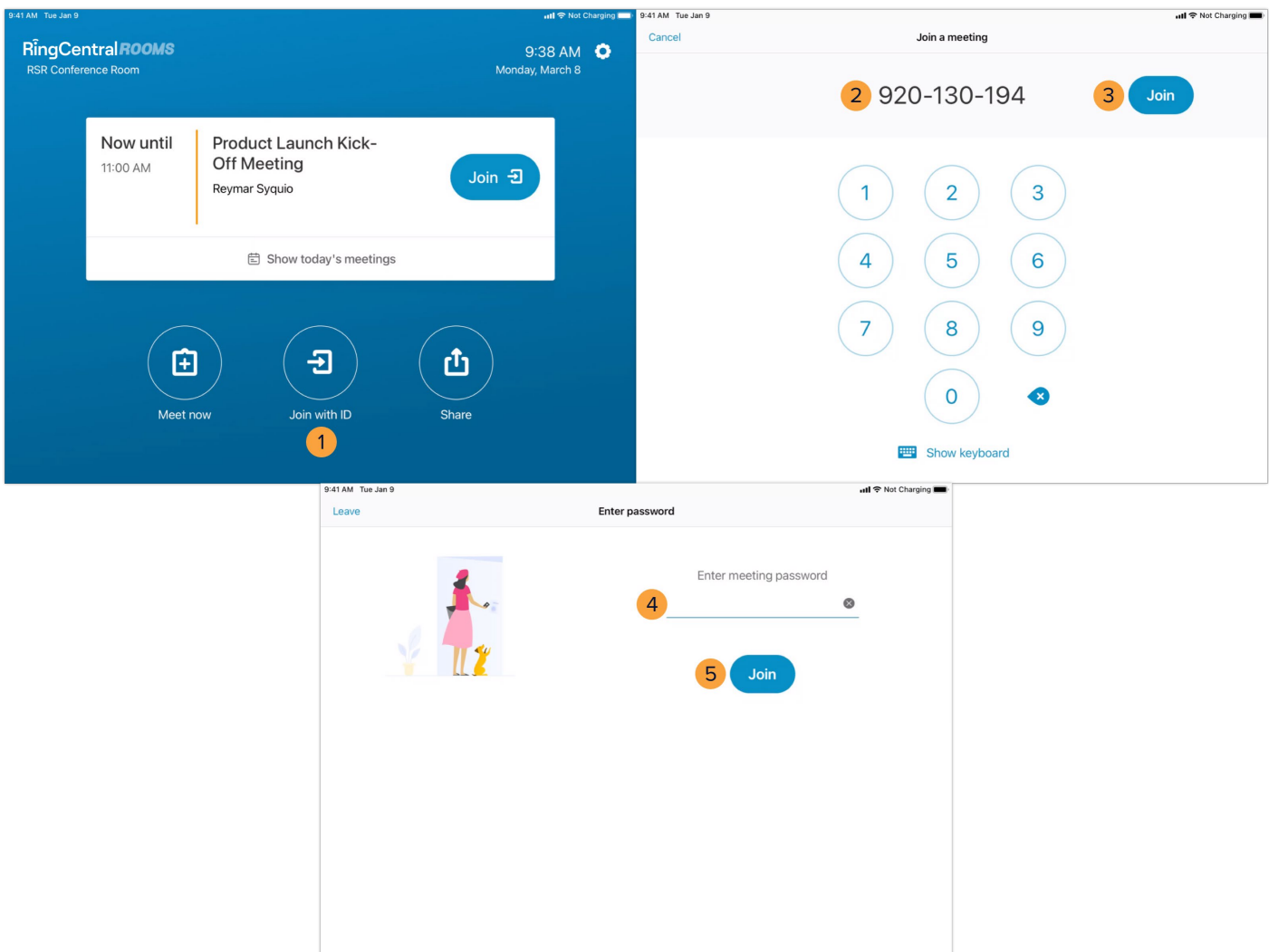
Joining video meetings using a meeting ID

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:

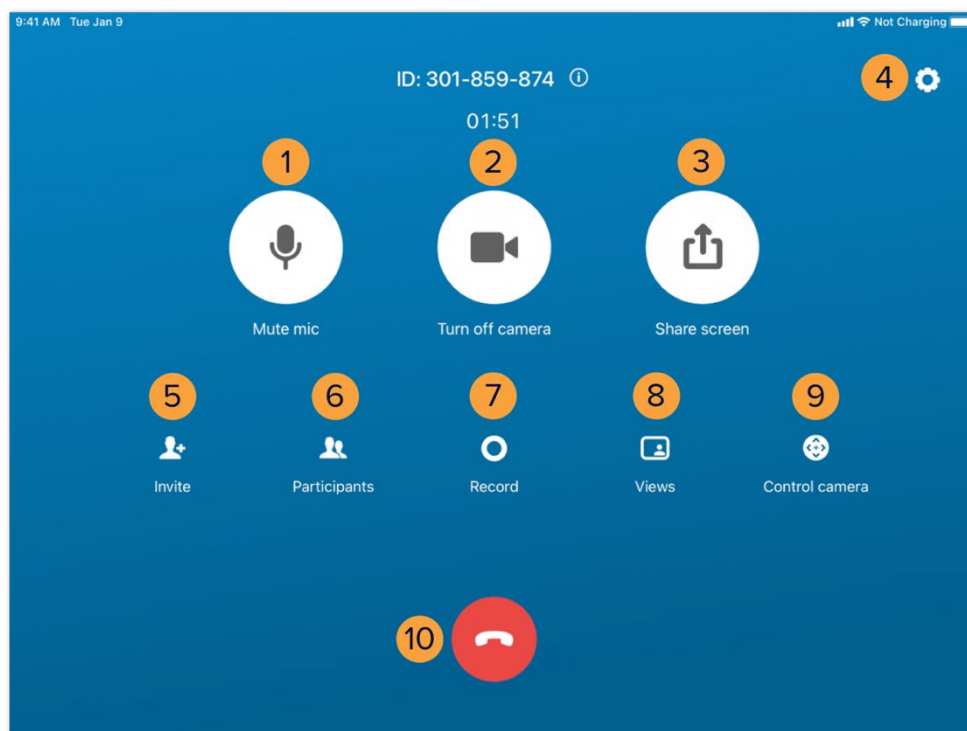
4. Type the meeting password.
5. Press **Join** again.



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 an active video meeting.

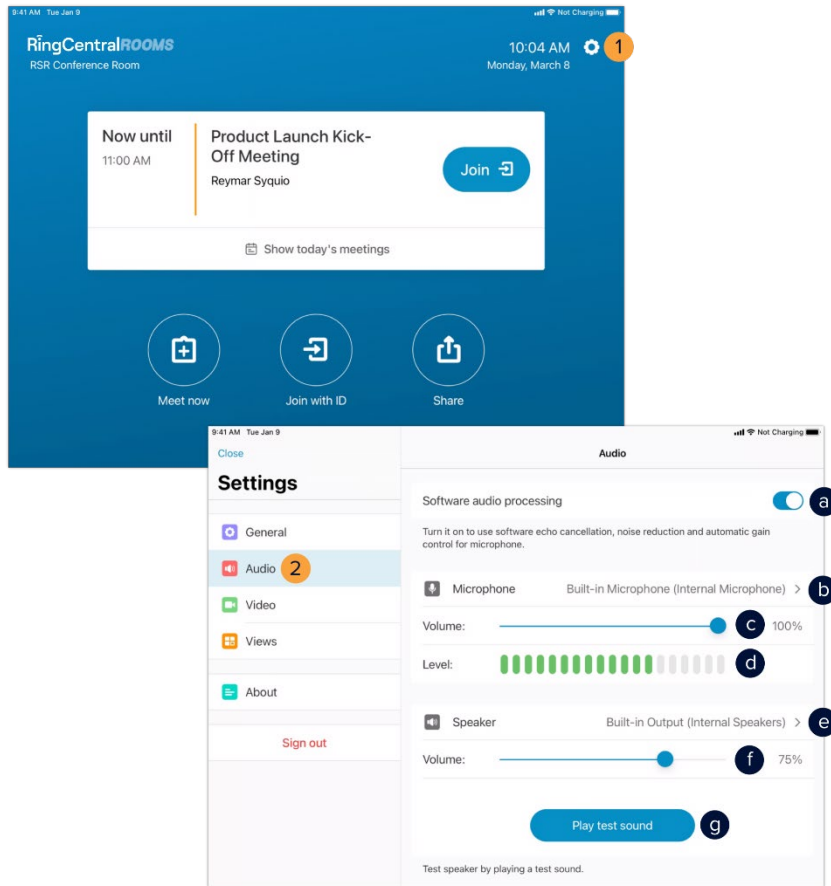
1. **Mute / Unmute mic** – Mutes or unmutes your microphone audio.
2. **Turn off / Turn on camera** – Enables or disables your video camera feed.
3. **Share screen** – Displays a URL and code you can use to share content from a device, besides the Room Controller, within the video meeting.
4. **Settings** – 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 as audio-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 them as 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 and assigned 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 Rooms camera, 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 you are 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 your overall microphone audio quality.
 - b. **Microphone** – Allows you to choose the microphone used with your RingCentral Rooms system.
 - 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 in helping determine that the microphone works.
 - e. **Speaker** – Allows you to choose the speaker to be used with your RingCentral Rooms system.
 - 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.





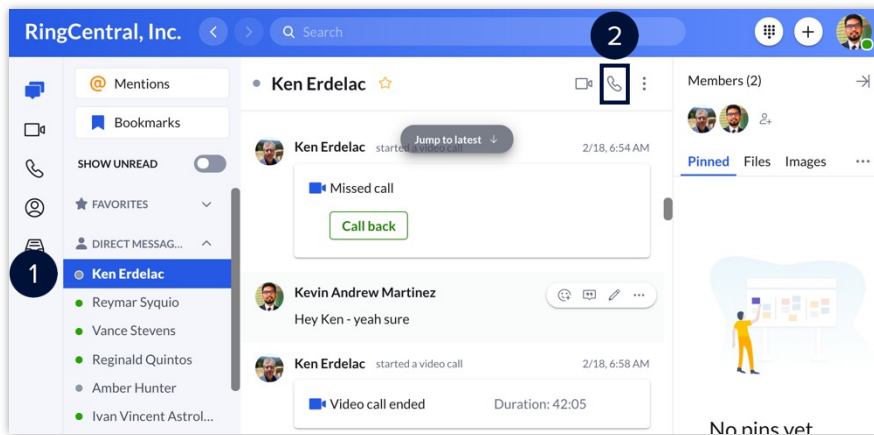
Phone

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.

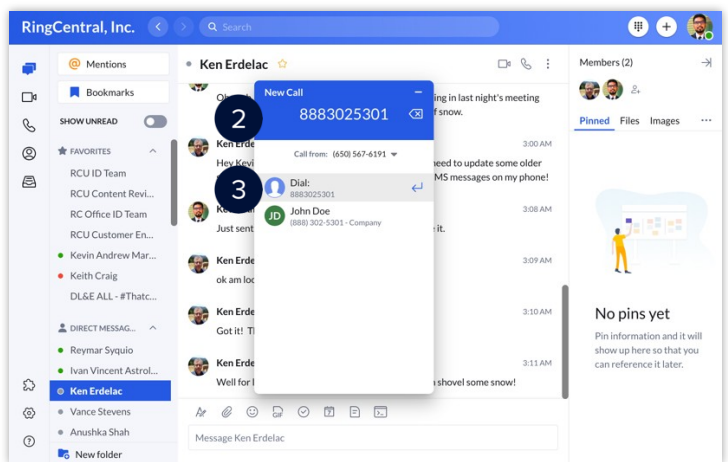
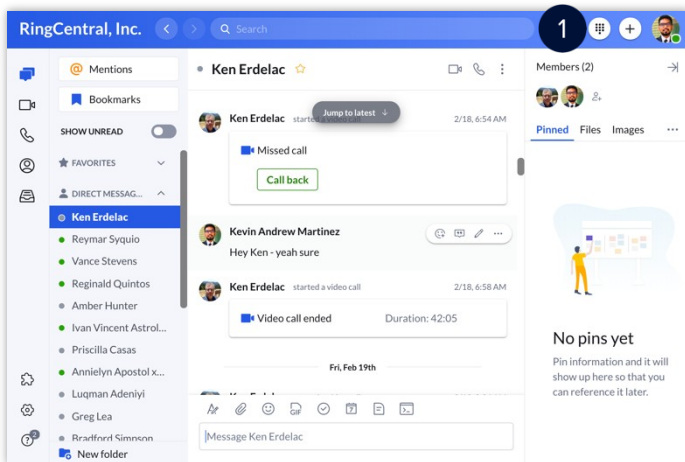
Initiate a call within an active one-on-one conversation

1. Select your preferred one-on-one conversation.
2. Click the **Phone**.



Initiate a call manually

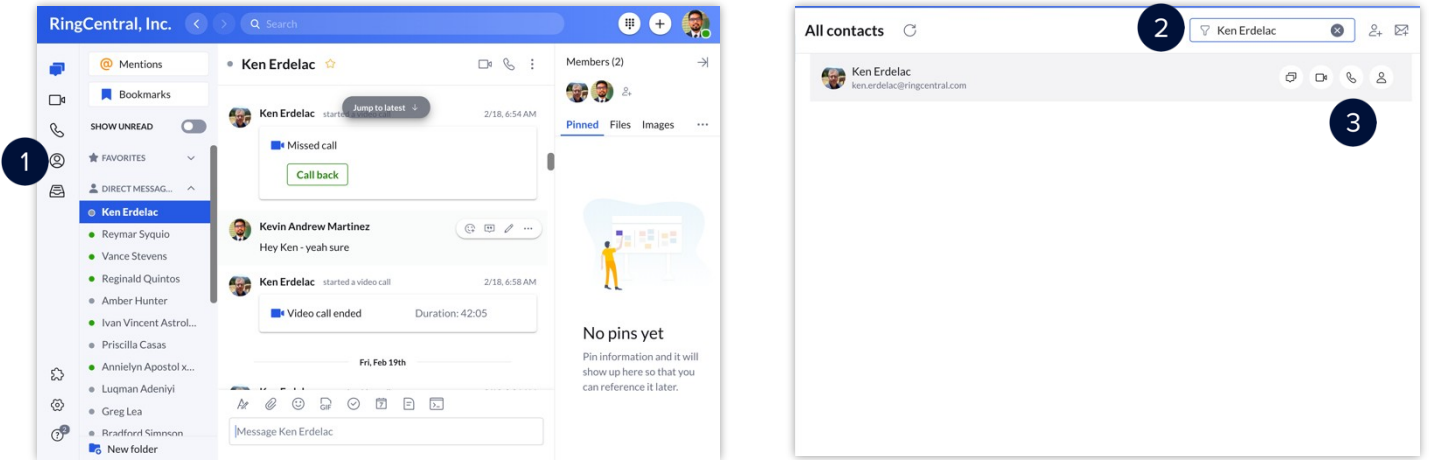
1. Click the **Dial pad**.
2. Enter your contact's name or phone number.
3. Click **Dial** to initiate the call.



Initiate a call from your contact list

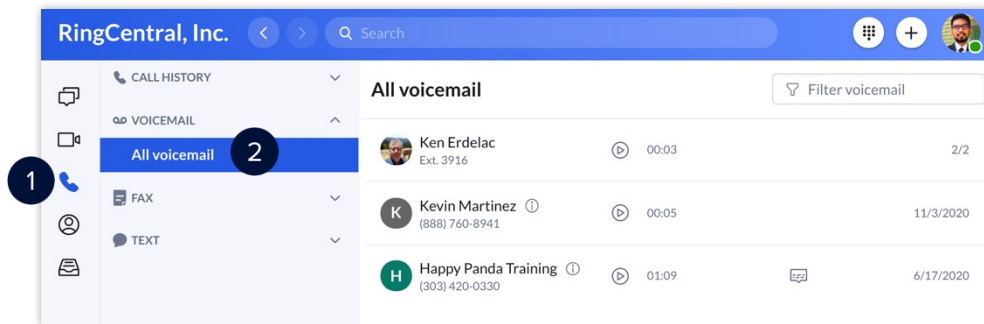
1. Click **Contacts**.
2. Type the name of your contact.
3. Click **Phone** to initiate the call.

Note: Users may have to click More and then Phone, depending on the RingCentral app window size.



Check your voicemails

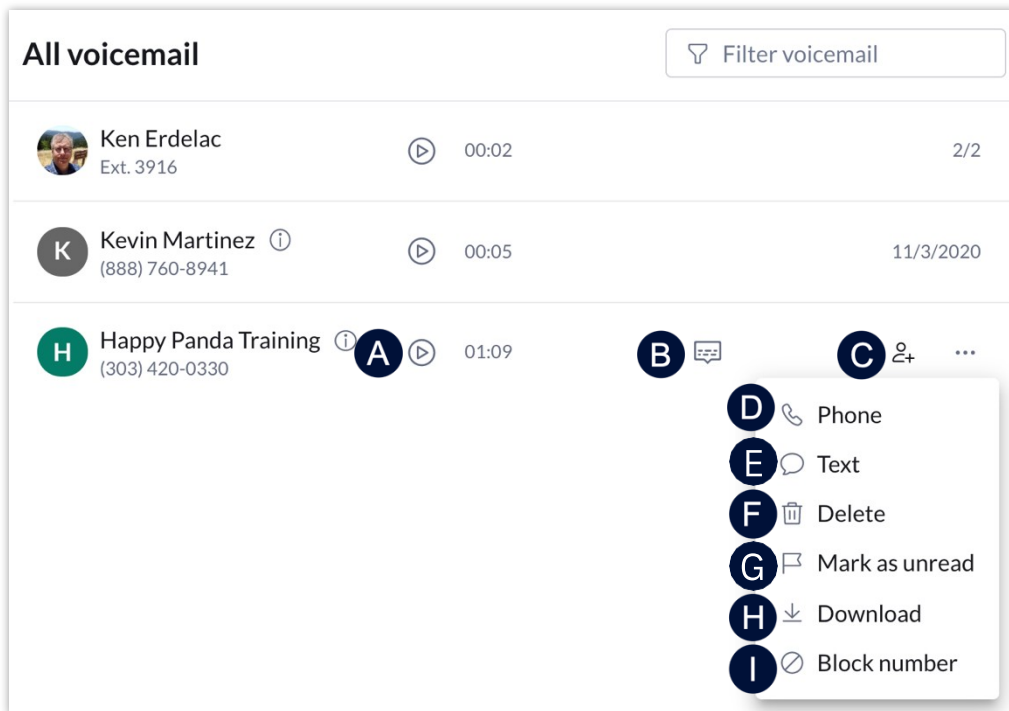
1. Click the **Phone Fax Text** icon.
2. Click **All voicemail**.



RingCentral App | Making Calls and Checking Voicemails

Each voicemail gives you the following options:

- A. **Play** – Play the message.
- B. **Show transcript** – Show a text transcript of the message.
- C. **Add contact** – Add the sender to your contact list.
- D. **Phone** – Call the sender.
- E. **Text** – Reply to the sender via text or via direct message if they are a part of your organization.
- F. **Delete** – Delete the message.
- G. **Mark as unread** – Mark the message as unread.
- H. **Download** – Download the message as an .mp3 file.
- I. **Block number** – Block the sender’s phone number.

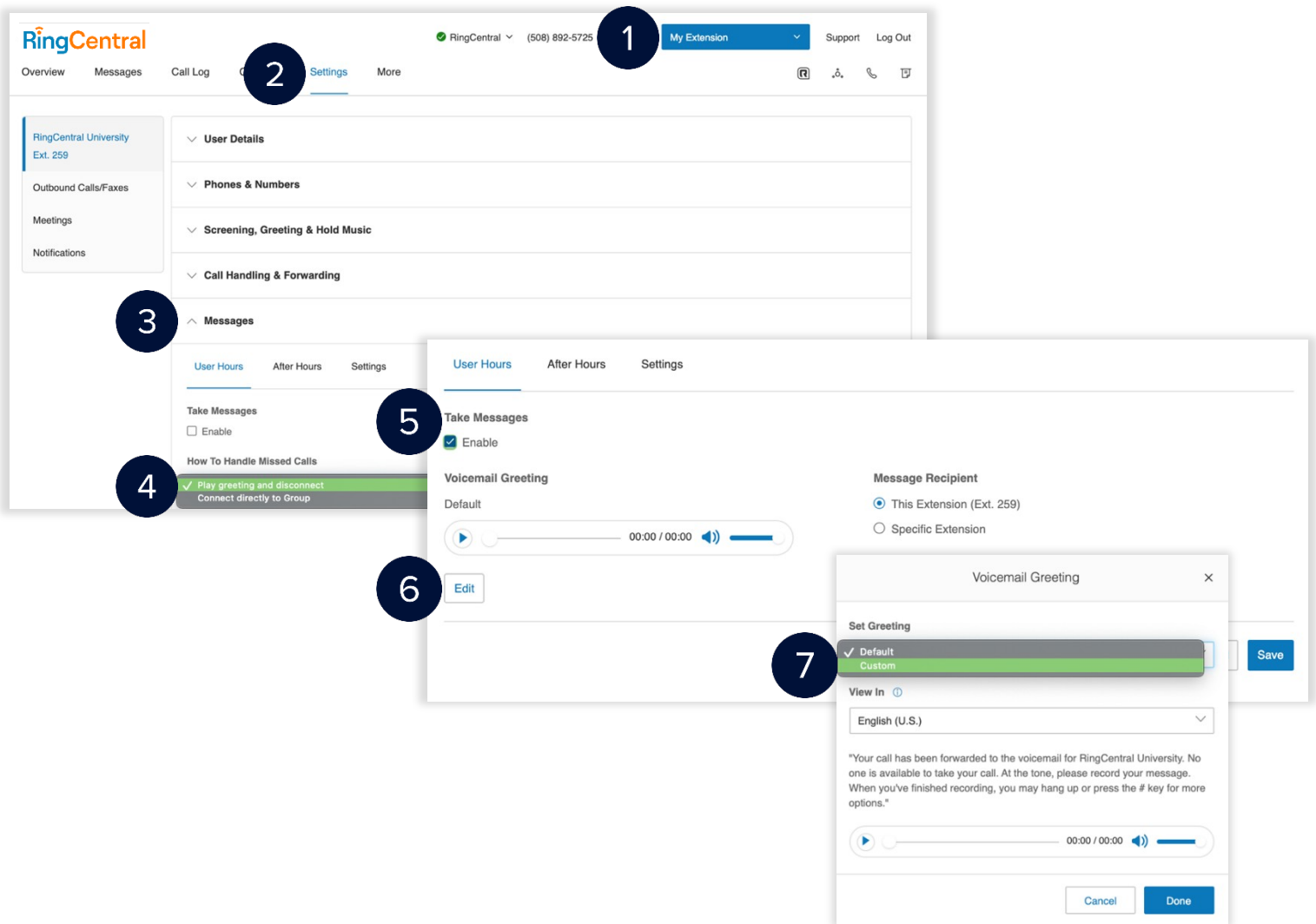


RingCentral Online Account: Updating your Voicemail Greeting

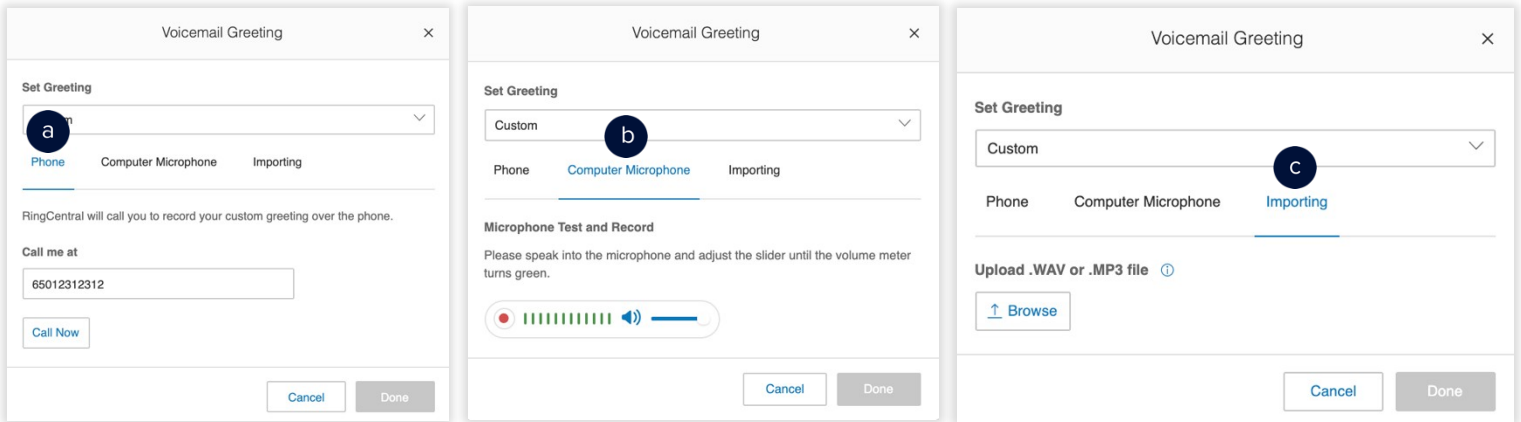
The voicemail greeting is what callers hear when they reach your voicemail box. This is different from your extension's user greeting, which plays when a caller reaches your extension initially.

Follow the steps below to personalize your voicemail greeting:

1. Log in to your RingCentral online account. Verify that your extension details display.
2. Click **Settings**.
3. Expand **Messages**. Customize your User Hours and After Hours voicemail greetings here.
4. Select how you want to handle missed calls. In this example, we select the Play Greeting and Disconnect **option**.
5. Play Greeting and Disconnect **option**.
6. Make sure that the **Take Message** option is enabled.
7. Click **Edit** to personalize your voicemail greeting.
8. Click the **Set Greeting** drop-down arrow and select **Custom**. You have multiple ways of customizing your greeting.

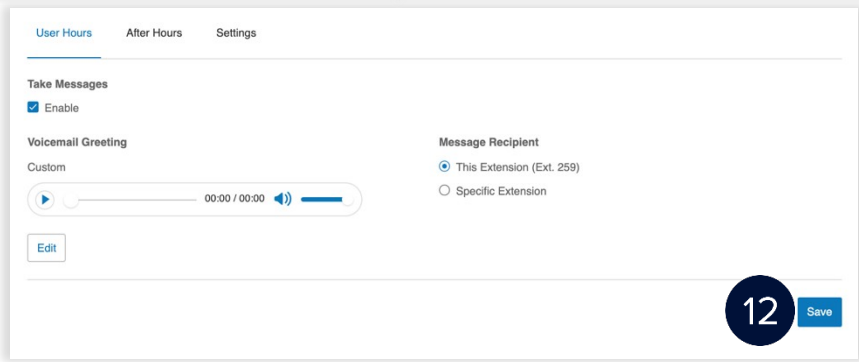
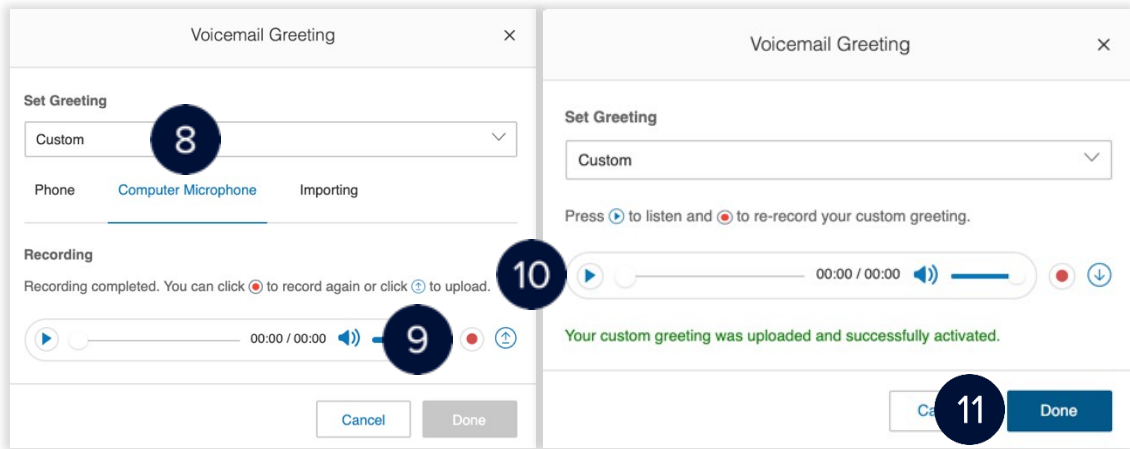


- a. **Phone** – RingCentral calls you at your specified phone number to record your custom greeting, follow the voice prompts to complete this process.
- b. **Computer Microphone** – Record your voicemail greeting using your computer microphone.
- c. **Importing** – Upload a .WAV or an MP3 file to play as your voicemail greeting. We recommend the following formats:
 - i. CCITT u-Law (G711a), 8kHz, 8 bit, mono
 - ii. PCM, 8kHz, 16 bit, mono



9. In this example, we selected **Computer Microphone**.
10. Click the red **record** button. Click the record button again to stop recording.
11. Review your recording by clicking the **Play** button. Otherwise, click the **Upload** button to proceed.
12. Click **Done**.
13. Click **Save**.

User Hours and After Hours use the same process to personalize voicemail greetings.



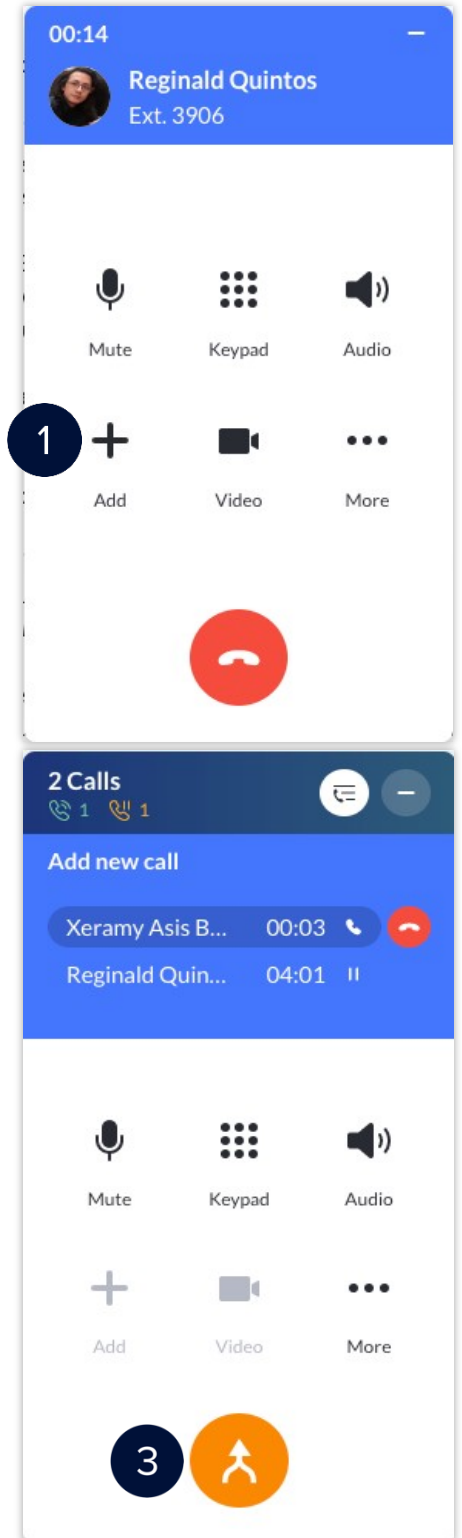
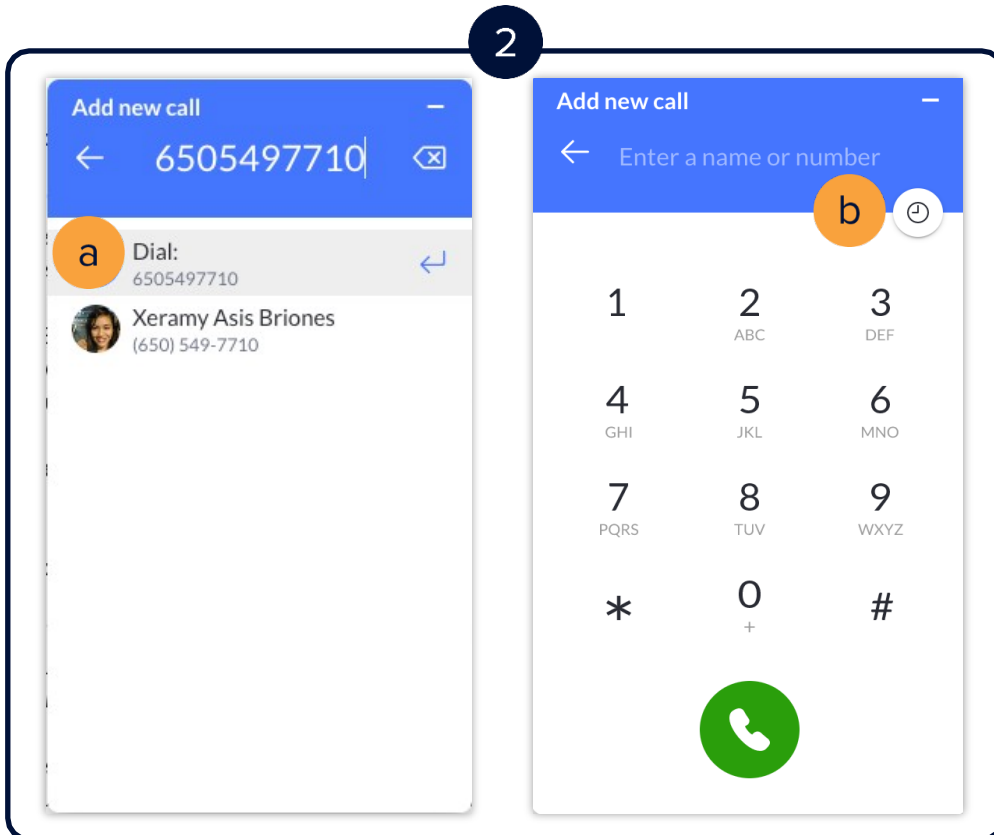
RingCentral App: Adding Callers

Adding more 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 contact list and displays a list to select from. You can also type the complete phone number to call 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.
- 4.

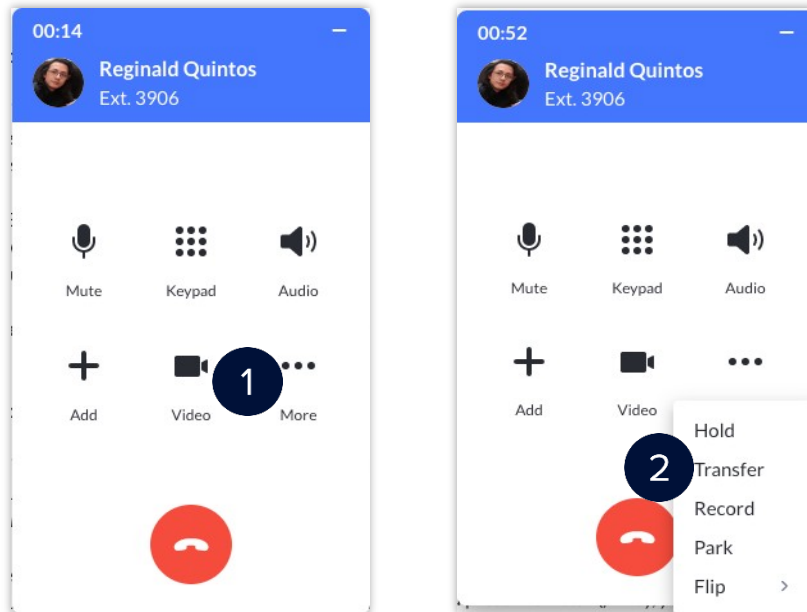
You can repeat the same steps to add seven more participants for a total of ten, including yourself.



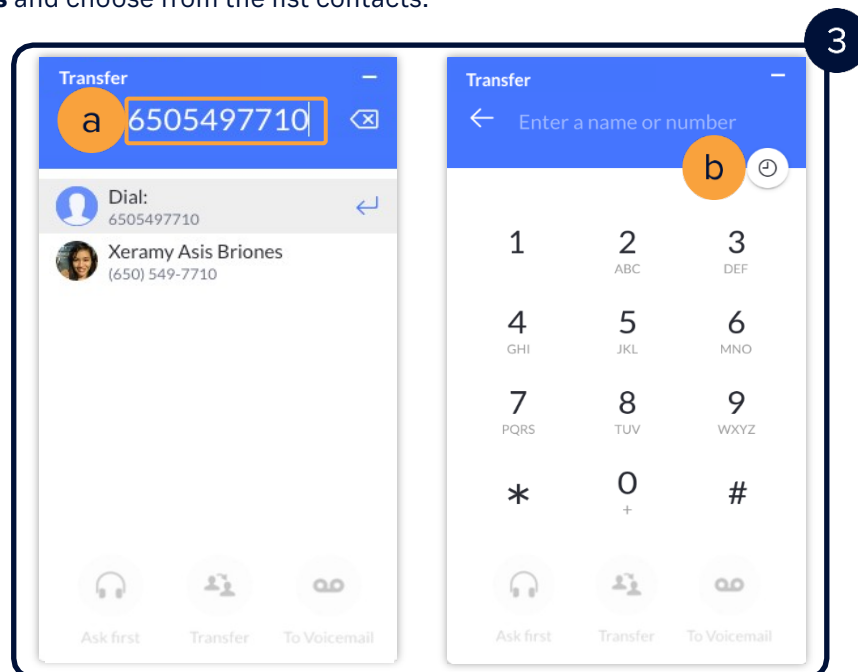
RingCentral App: Transferring Calls

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**.

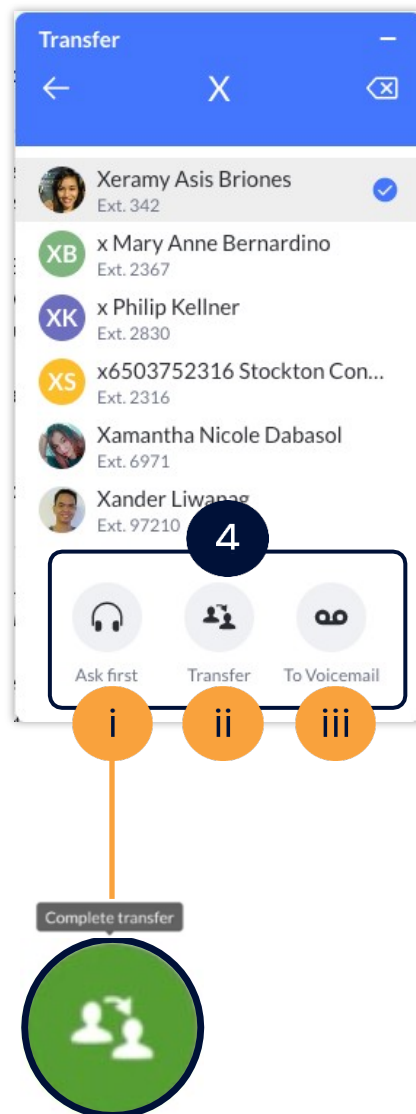


3. There are two ways for you to add the number of the person to transfer the call:
 - a. The RingCentral app automatically looks up contacts already in your contact list as you type. Select your preferred contact from the list displayed. You can also just type the complete phone number of the person you want to transfer the call to and click **Dial**.
 - b. Click **Recent calls** and choose from the list contacts.



4. Choose one of the three transfer options:
 - i. **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**.
 - ii. **Transfer** – Immediately completes the call transfer to the receiving party and disconnects the call on your end.
 - iii. **To Voicemail** – Sends the caller directly to the Voicemail of the receiving party.

This option is only available when you are transferring to a contact within your organization's RingCentral account.



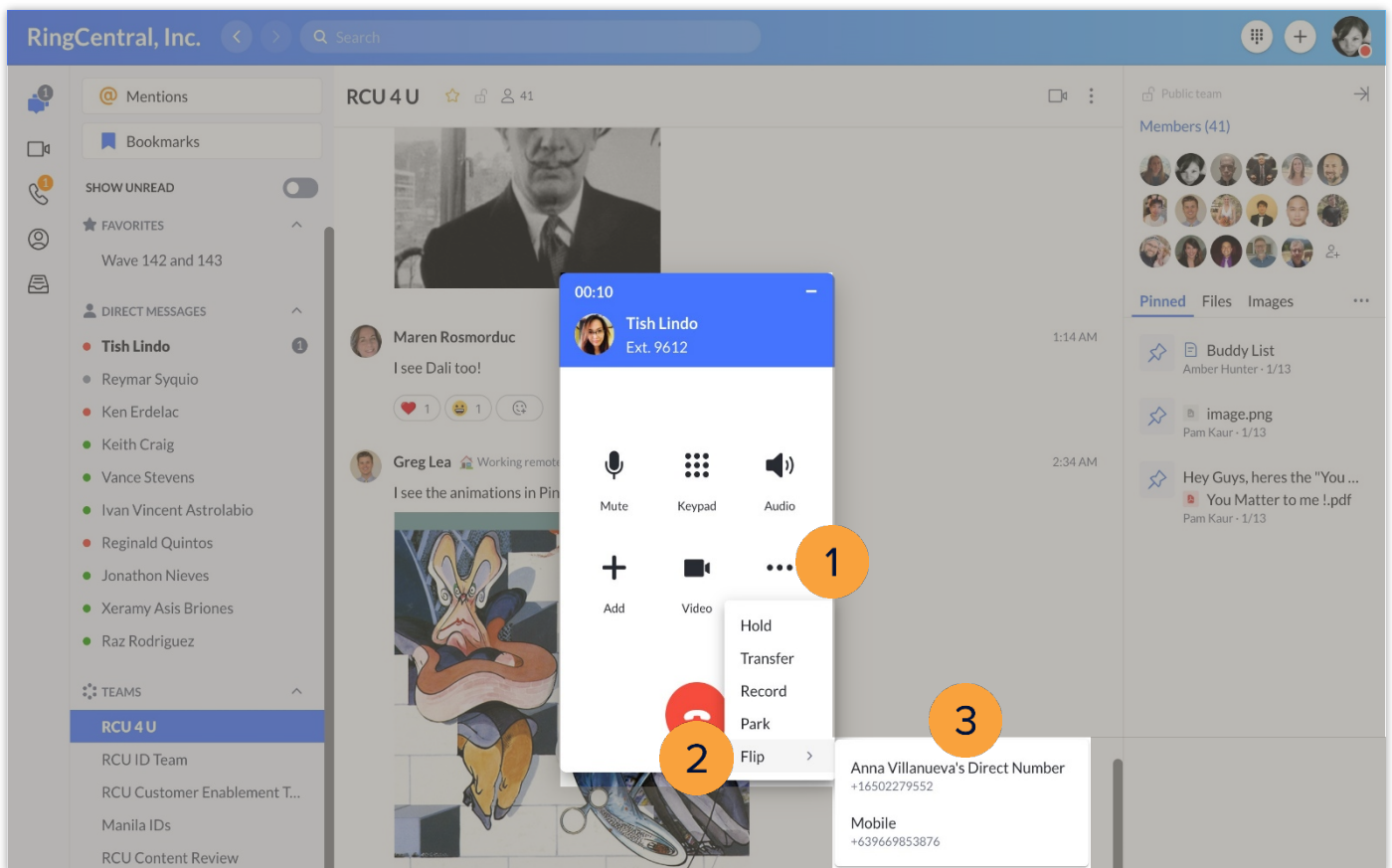
RingCentral App: Using Call Flip Options

The Call Flip feature in the RingCentral app lets you transfer or "push" a live call between your extension's assigned call forwarding devices, 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 app in your desktop computer. You can initiate a Call Flip from your desktop app to continue the conversation on your mobile phone.

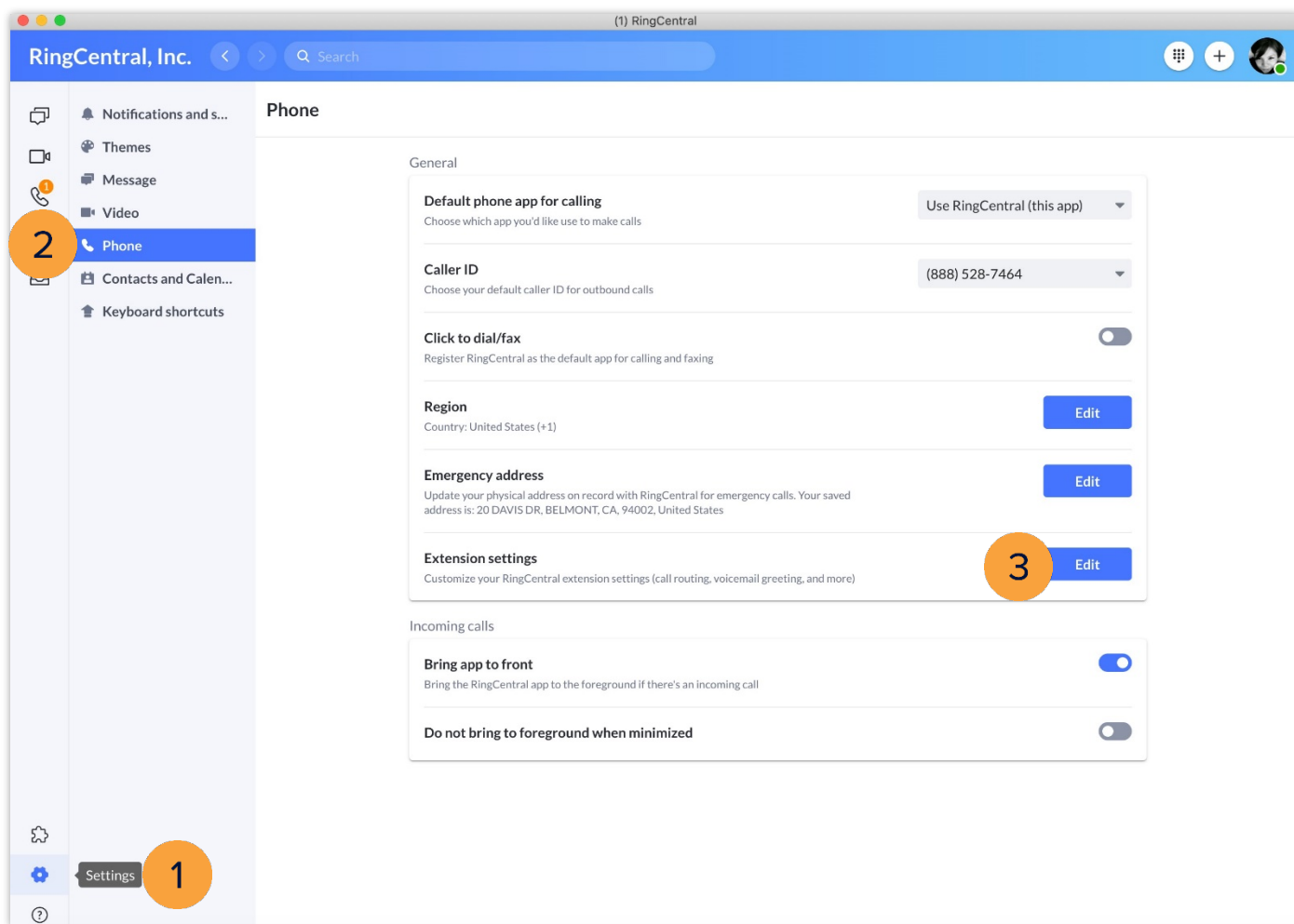
While in an active call:

1. Click **Call Actions**.
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 in the Call Handling & Forwarding settings of your extension.

1. Click **Settings**.
2. Select **Phone**.
3. Click **Edit** under the Extension Settings section.



Learn more about configuring your Call Handling & Forwarding settings:
<https://support.ringcentral.com/article/9758.html>

RingCentral App: Using RingOut through the RingCentral App for Mobile

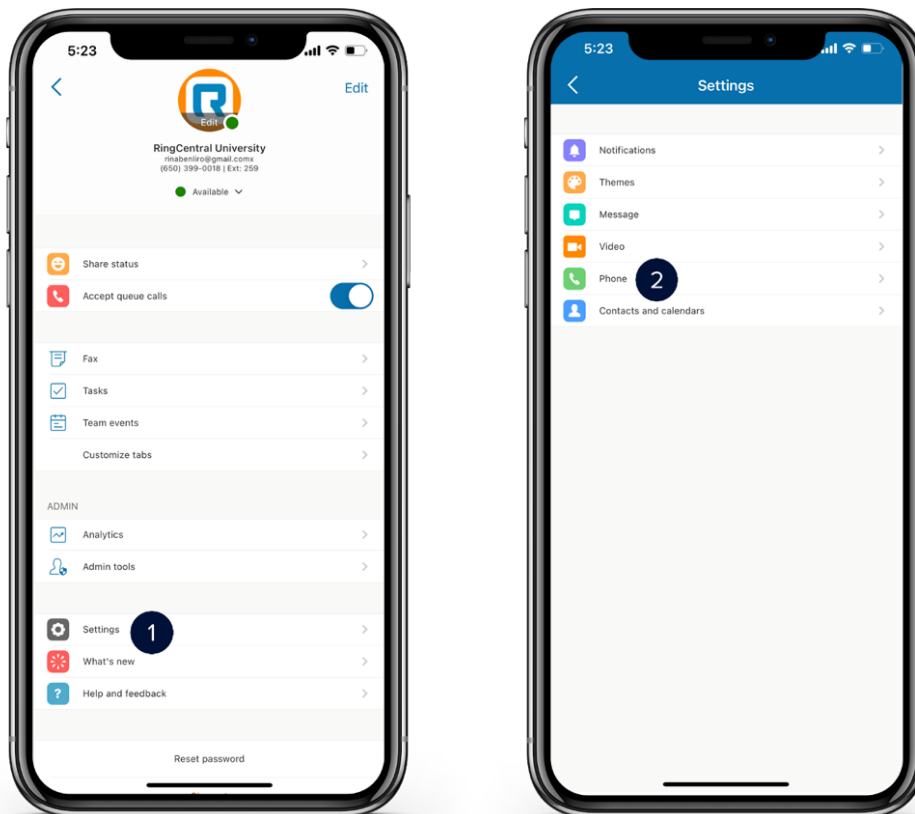
Using the RingOut feature has the RingCentral app connect your calls using your incoming call carrier minutes instead of mobile data or Wi-Fi. This is useful when you are travelling, and the Wi-Fi or mobile data connectivity is unreliable. Once enabled, RingOut has the RingCentral system call your indicated RingOut number first (this should be your phone number), then it automatically connects you to the phone number you dialed. Calls made with RingOut display the same Caller ID that you have set in the RingCentral app.

Initiating calls using the RingOut feature still requires internet connectivity.

Enabling the RingOut feature

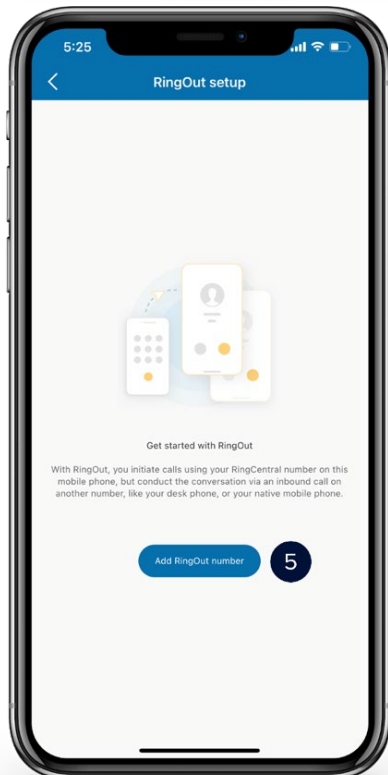
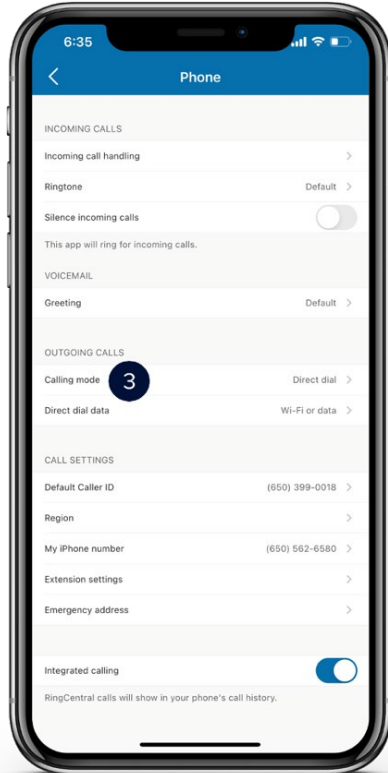
Follow the steps below to enable the RingOut feature:

1. Tap your **Profile Picture** and choose **Settings**.
2. Tap **Phone**.



RingCentral App | Using RingOut Through the RingCentral App for Mobile

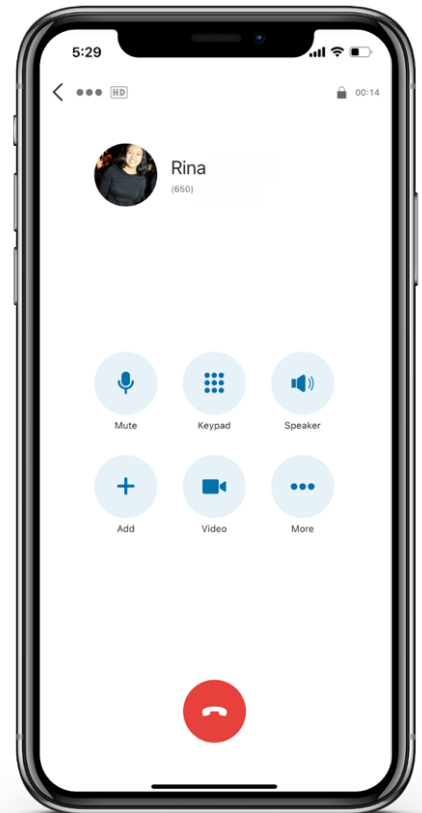
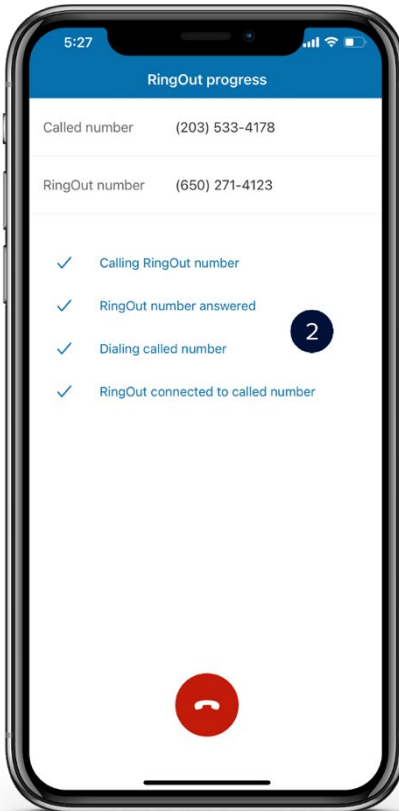
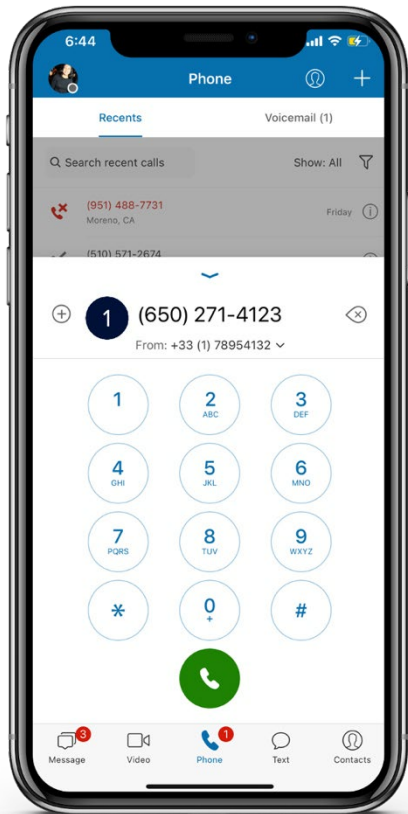
3. Under **Outgoing Calls**, select **Calling mode**.
4. By default, your calling mode is Direct dial. Choose **RingOut** to enable this feature.
5. If no number is assigned to RingOut, tap **Add RingOut number**.
6. Type in your RingOut number (your phone number). Make sure that the number you enter is an active number as this will be used to connect your RingOut call.



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 will appear.
3. You are now connected via the RingOut feature.

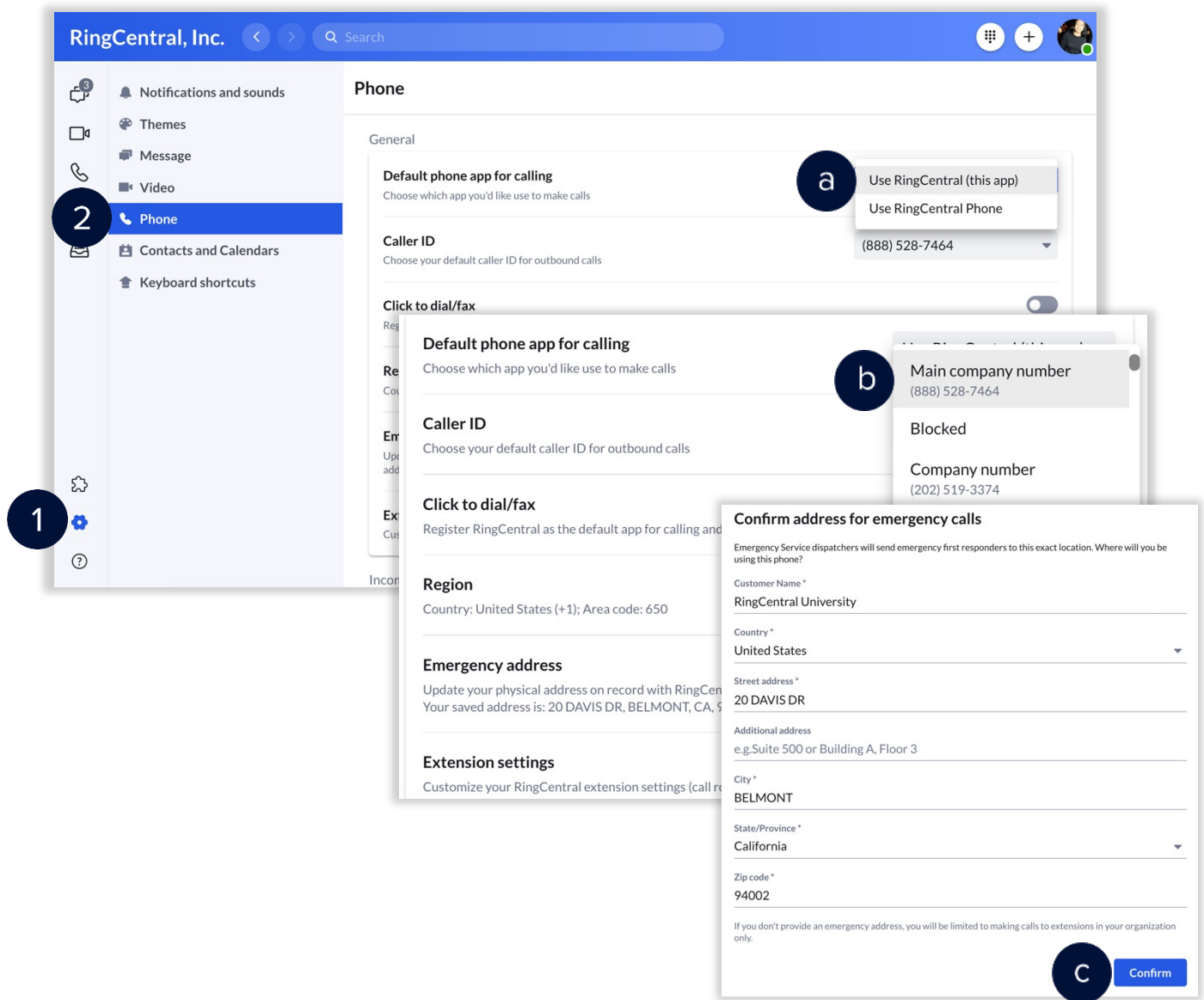


RingCentral App: Setting Your Phone Preferences

This quick guide shows you how to get ready to use the calling feature of the RingCentral application.

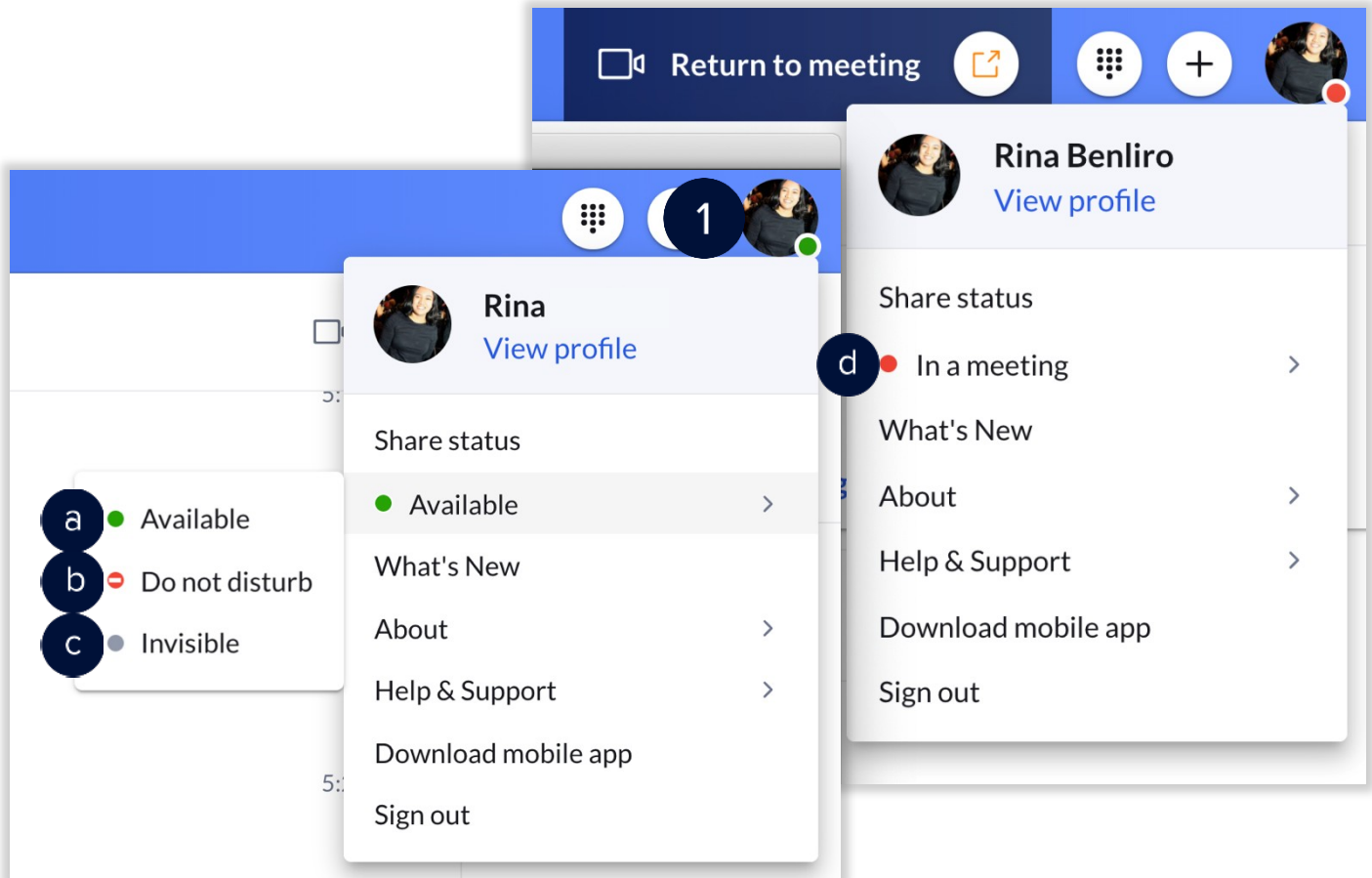
Setting your phone preferences

1. Click Settings.
2. Click **Phone**.
 - a. Under “Default phone app for calling”, select the **Use RingCentral (this app)** option.
 - b. Click the **Caller ID** dropdown menu to select your preferred Caller ID for outbound calls.
 - c. Update your physical address under the Emergency address section and click **Confirm**.



Updating your availability status

1. 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 individual or group messages.
 - c. Selecting **Invisible** gives the impression that you are offline. You still receive messages and calls.
 - d. Your status appears as **In a meeting** when on phone or video calls.



RingCentral App: Starting Audio Conference Calls

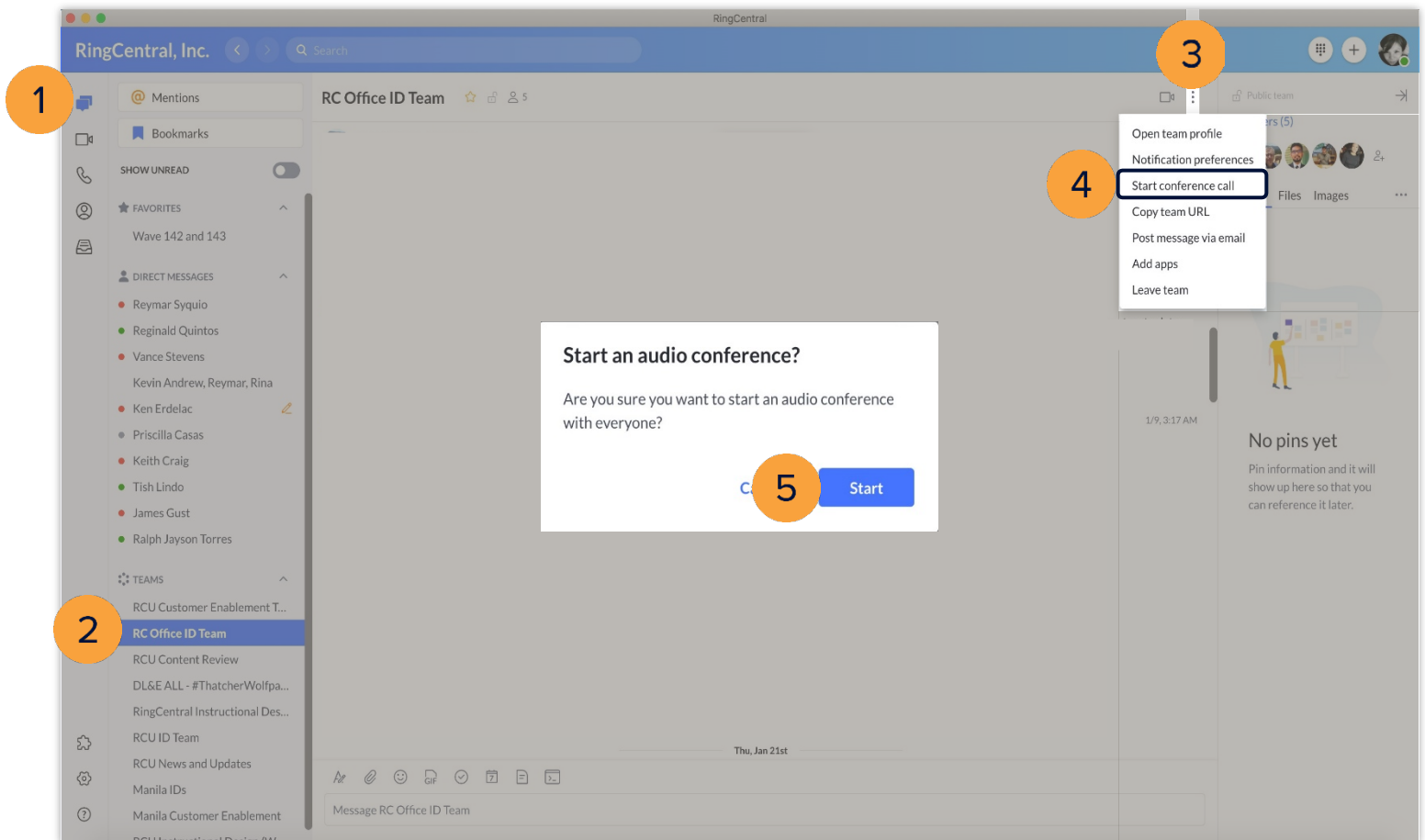
Conference calling is one of the key features within the RingCentral app. Conference calls allow talking to several people at the same time. There are a few ways to start a conference call within the app, including the following:

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

Starting conference calls

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

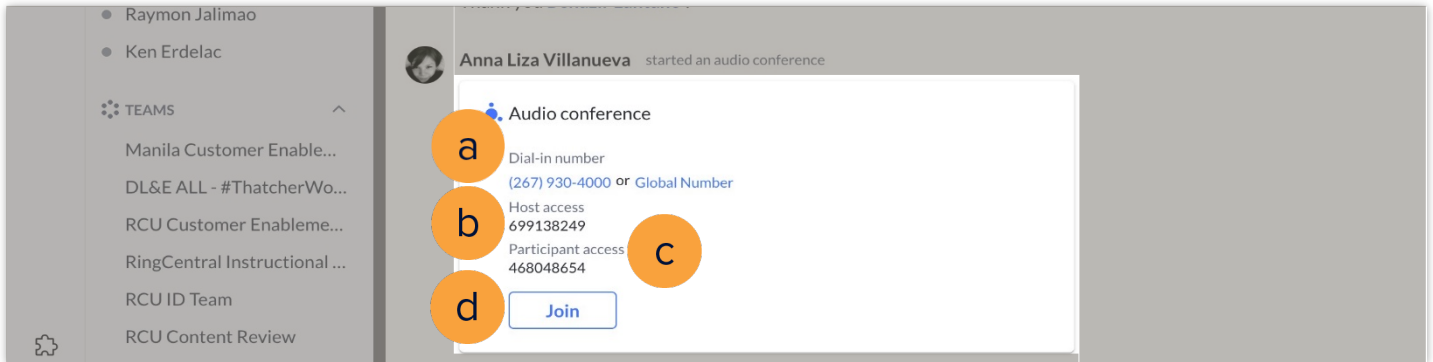
1. Navigate to the **Message** section via the side menu bar.
2. Select a group or team conversation via the conversation list.
3. Click **More**.
4. Click **Start conference call**.
5. Click **Start**.



Joining conference calls

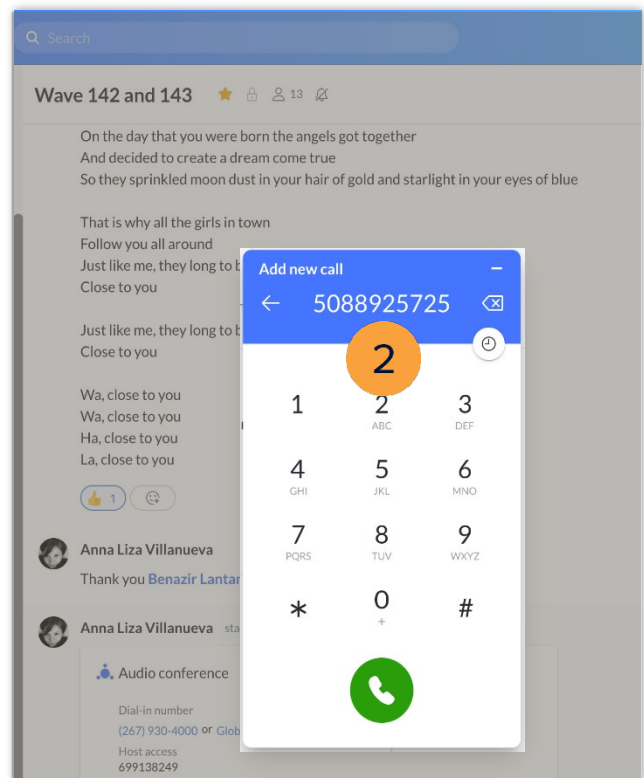
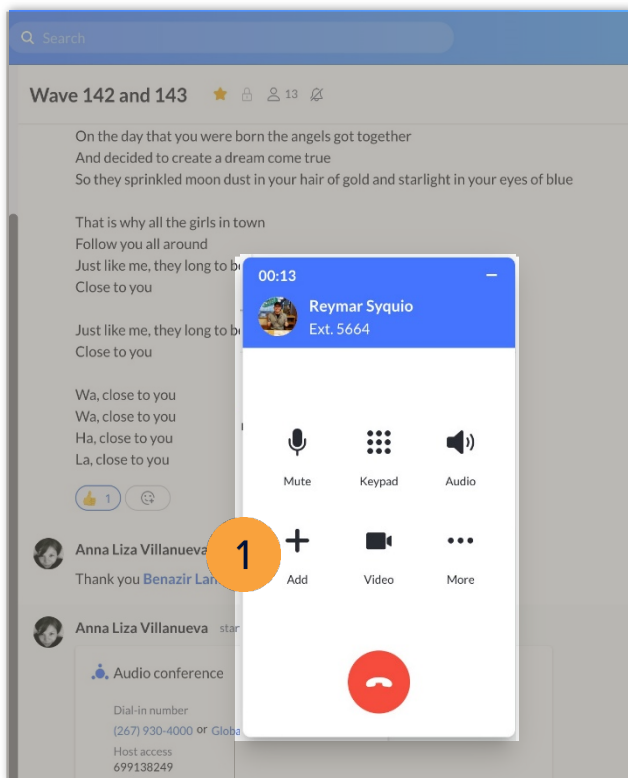
A message with options for joining the conference call appears when a conference call in a team or group starts.

- Dial-in number** – regional or global number that the team or group members can use to dial into the conference call.
- Host access** – the code the host (the person who starts the call) uses to dial in to the conference call.
- Participant access** – the code the guests use to dial in to the conference call.
- Join** – join the conference call.



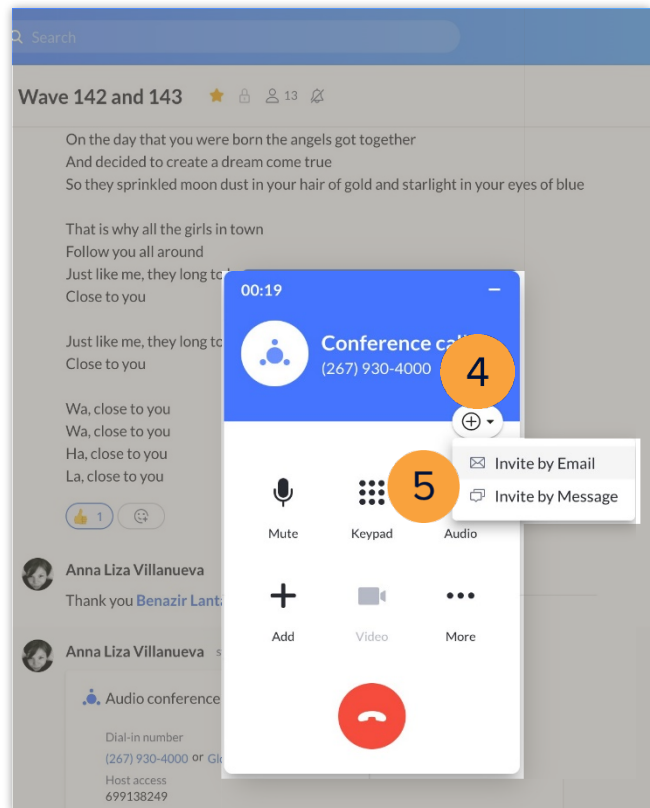
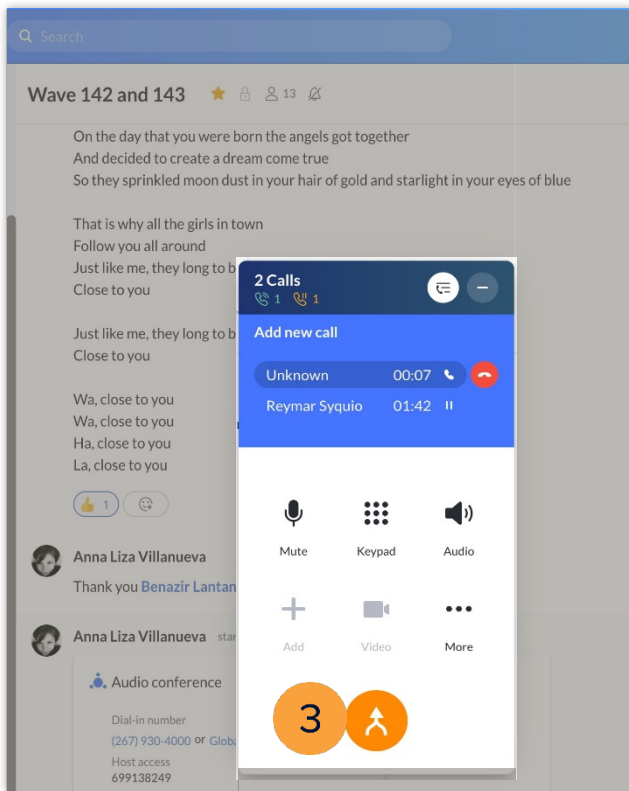
Converting live calls into conference calls

- While on a call, click **Add**.
- Dial the number of the person to be added to the call.



RingCentral App | Starting Audio Conference

3. Click **Merge to conference**.
4. Click the **Invite** button to add more people to the conference.
5. Select the method to invite:
 - **Invite by Email**
 - **Invite by Message**



RingCentral Online Account: Forwarding Voicemail Messages to Email

You can configure your extension to forward your voicemail messages to your email through your RingCentral Online Account. Once this setting is completed, when you receive a voicemail message, it is not only accessible in your RingCentral app's voicemail section, but it is also sent to your email with the voicemail attached.

Follow the steps to enable voicemail email notification:

1. Access your RingCentral online account and verify that your extension details display.
2. Click **Settings**.
3. Select **Notifications**.
4. Click the drop-down menu and select **Advanced Settings**.
5. Check **Voicemail Messages** under By Email.
6. To ensure the notification includes an attachment, click **Customize Notifications**.
7. Under Additional Settings, verify **"Include attachment with email"** is checked.
8. Type your preferred email address in the Email field. Separate multiple email addresses with semicolons.
9. Click **Done**.
10. Click **Save**.

The image illustrates the configuration process in the RingCentral online account. It shows the 'Settings' page with 'Notifications' selected. A table lists notification types and their delivery methods (By Email, By SMS). The 'Voicemail Messages' row is highlighted, showing it is checked for 'By Email'. A 'Customize Notifications' link is visible. A dialog box titled 'Notifications for Voicemail Messages' is shown, with 'Include attachment with email' checked and an email address entered in the 'Send Notifications to' field. The 'Done' button is highlighted.

	By Email	By SMS	Actions
Voicemail Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customize Notifications
Received Faxes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customize Notifications
Missed Calls	<input type="checkbox"/>	<input type="checkbox"/>	Customize Notifications
Fax Transmission Results	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customize Notifications
Received Text Messages	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Customize Notifications

RingCentral App: Using the Call Park Feature

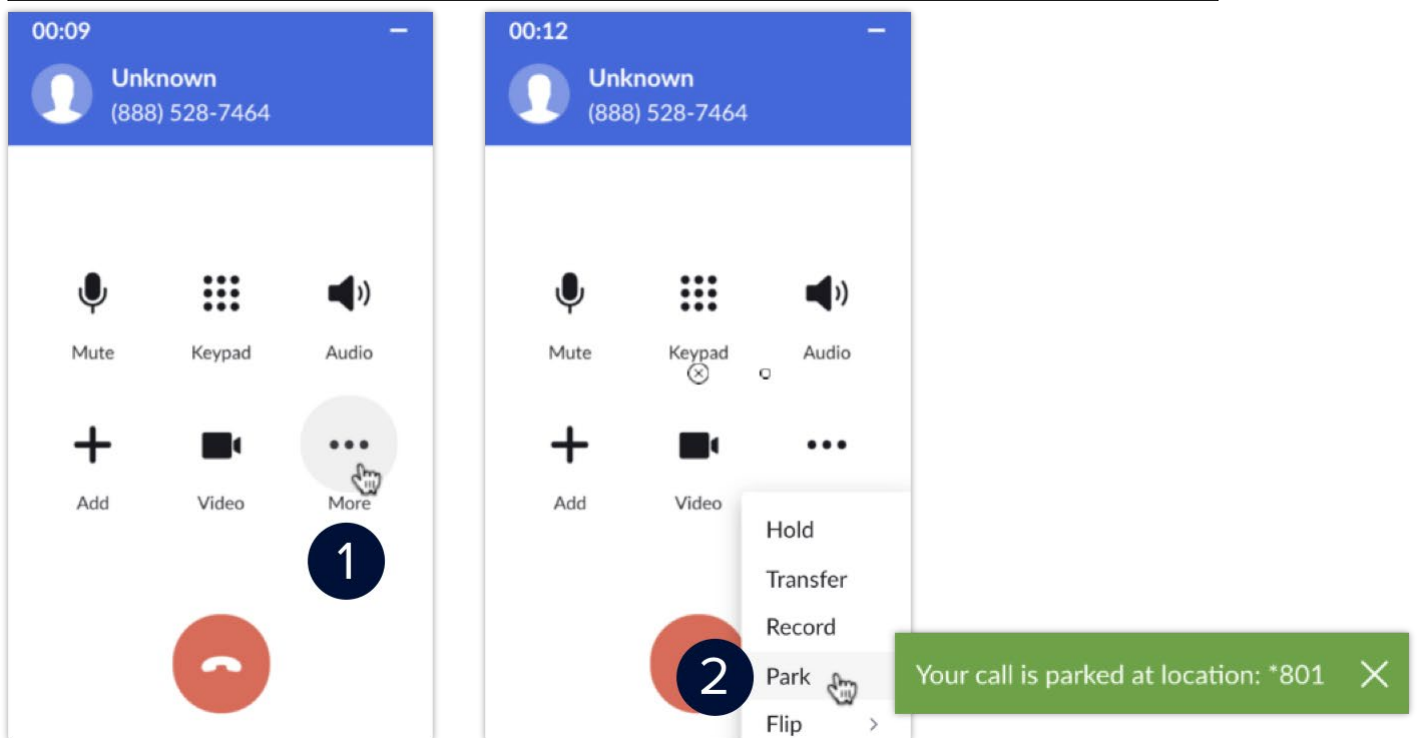
Call Park is a feature that allows RingCentral app users to place a call in a Public Call Park location and have a different user pick up the call, by dialing the park location extension generated by the system.

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.

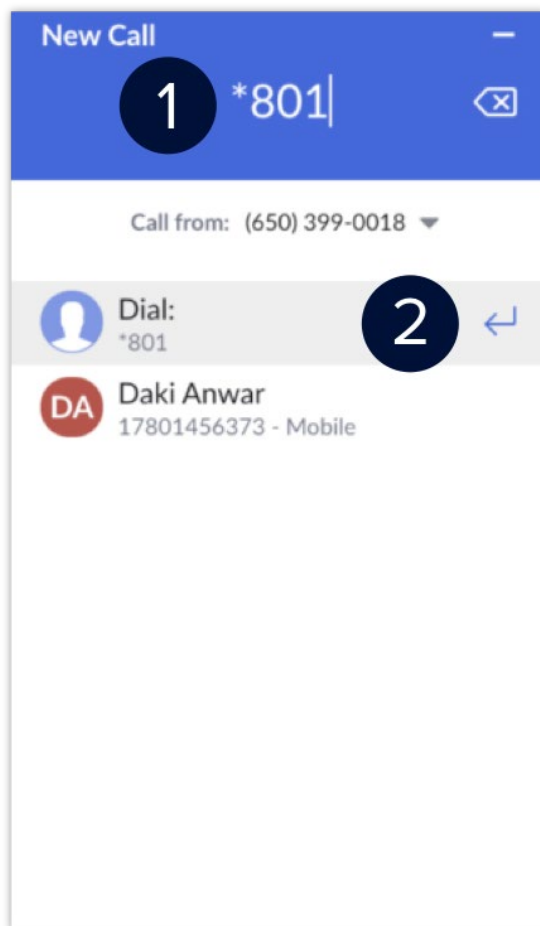
Call park location extensions are automatically generated, with ranges from *801 to *899.



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 & Forwarding Settings

Users can configure where to receive incoming calls in the RingCentral online account. Calls can be forwarded to multiple endpoints where you want them to be answered. Extensions can forward incoming calls to their Desktop & Mobile App, desk phone, or a third-party phone number. Note that you may need permission from your account administrator to edit Call Handling & Forwarding settings.

1. Access **My Extension** of your RingCentral Online Account.
2. Click **Settings**.
3. Click **Call Handling & Forwarding**. Click
4. **User Hours**.
5. Toggle the **Active switch** of the appropriate destination you want incoming calls to be forwarded.

Happy Panda (719) 225-2200 My Extension Support Log Out

Overview Messages Call Log Con Settings More

Happy Panda Training Ext. 101

Outbound Calls/Faxes

Meetings

Notifications

User Details

Phones & Numbers

Screening, Greeting & Hold Music

3 Call Handling & Forwarding

4 User Hours After Hours Settings Custom Rules

To edit or set up the group and position the call forwarding number. [Learn More](#)

Incoming Calls Forward in this Order

Sequentially + Add Call Forwarding Phone

Create Ring Group Ungroup

<input type="checkbox"/>	Order	Active	Ring For	Name	Number
<input type="checkbox"/>	1	<input checked="" type="checkbox"/>	6 Rings / 30 Secs	Desktop & Mobile Apps	
		<input type="checkbox"/>	Always ring for at least 30 seconds before forwarding is completed.		
<input type="checkbox"/>	2	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Gloria Sangster Existing Phone	(719) 225-1205
<input type="checkbox"/>	3	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Home	(555) 555-5555
<input type="checkbox"/>	4	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Mobile	1234567890
<input type="checkbox"/>	5	<input type="checkbox"/>	4 Rings / 20 Secs	Work	Phone Number

RingCentral App | Configuring Your Extension's Call Handling & Forwarding

These are the locations that you can forward your calls to:

- **Desktop & Mobile App** – You must be logged in to the RingCentral Phone Desktop or Mobile app to receive the forwarded calls.
 - **Desk Phone** – Receive the forwarded calls on the desk phone set up by your administrator.
 - **Home, Mobile, and Work Phone Number** – Add up to 10 forwarding numbers for each of your extensions and set calls to ring sequentially or simultaneously.
 - **Another Extension Within Your Company** – Forward calls to the desk phone or softphone of another user.
6. Set the number of rings for each phone and forwarding number on the list.
 7. Select the order or sequence of your call forwarding numbers.
 - **Simultaneously** – call rings on all forwarded phones at the same time. Ringing to some devices may be delayed due to different networks.
 - **Sequentially** – call rings on forwarded phones in sequential order. You can drag and drop the row of the respective forwarded phones to change their sequence.
 8. Click **Save**.

The screenshot displays the 'Incoming Calls Forward in this Order' configuration page. At the top, there are tabs for 'User Hours', 'After Hours', 'Settings', and 'Custom Rules'. Below the tabs, a dropdown menu is open, showing 'Sequentially' as the selected option. A table lists six forwarding destinations, each with a 'Name' and a 'Number' field. The first destination is 'Desktop & Mobile Apps'. The second is 'Gloria Sangster Existing Phone' with number '(719) 225-1205'. The third is 'Home' with number '(555) 555-5555'. The fourth is 'Mobile' with number '1234567890'. The fifth is 'Anna Liza Villanueva RingCentral P...' with number '(925) 746-9071'. The sixth is 'Work' with a 'Phone Number' field. A 'Save' button is located at the bottom right of the page.

			Name	Number
1	<input checked="" type="checkbox"/>	6 Rings / 30 Secs	Desktop & Mobile Apps	
	<input type="checkbox"/>	Always ring for at least 30 seconds before forwarding is completed.		
2	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Gloria Sangster Existing Phone	(719) 225-1205
3	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Home	(555) 555-5555
4	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Mobile	1234567890
5	<input checked="" type="checkbox"/>	4 Rings / 20 Secs	Anna Liza Villanueva RingCentral P...	(925) 746-9071
6	<input type="checkbox"/>	4 Rings / 20 Secs	Work	Phone Number

Setting up call handling and forwarding for after hours

After Hours call handling takes effect after your extension's User Hours. If your schedule is set to 24/7, you will need to set specific User Hours before you can define After Hours call handling settings. There are four options to handle your calls during After Hours:

Send callers directly to voicemail - routes the caller to your voicemail following the extension's After Hours settings.

- i. Select Send callers directly to **voicemail**.
- ii. Click **Save**.

Decide how you want your calls answered during After Hours.

Your calls will do this during After Hours

Send callers directly to voicemail

Select if you want calls to go directly to your voicemail.

Save

Play announcement and disconnect - plays the default or a custom recorded announcement then disconnects the call.

- i. Select **Custom**.
- ii. Choose where to record:
 - Phone
 - Computer Microphone
 - Importing

In the case that you choose to record on the Phone, click Call Now once you have entered the number for you to call at.

- iii. Click **Done**.

Announcement

Set Greeting

Custom

Phone Computer Microphone Importing

RingCentral will call you to record your custom greeting over the phone.

Mobile: 1234567890

Call Now

Done

Forward Calls - Forwards the call to multiple phone numbers in a specific order and applies your Greeting settings. Refer to Step 5 for the complete procedure.

Unconditional Forwarding - immediately forward calls to the specified phone number without applying additional settings. For example, calls are forwarded to your personal voicemail when unanswered.

- i. Enter the phone number.
- ii. Click **Save**.

Your calls will do this during After Hours

Unconditional Forwarding

Select if you want to forward the call to a different phone number without having to go through your greeting settings. This option is good when you want the call to go directly to your personal voicemail when you don't pick-up.

Forward Calls

Save

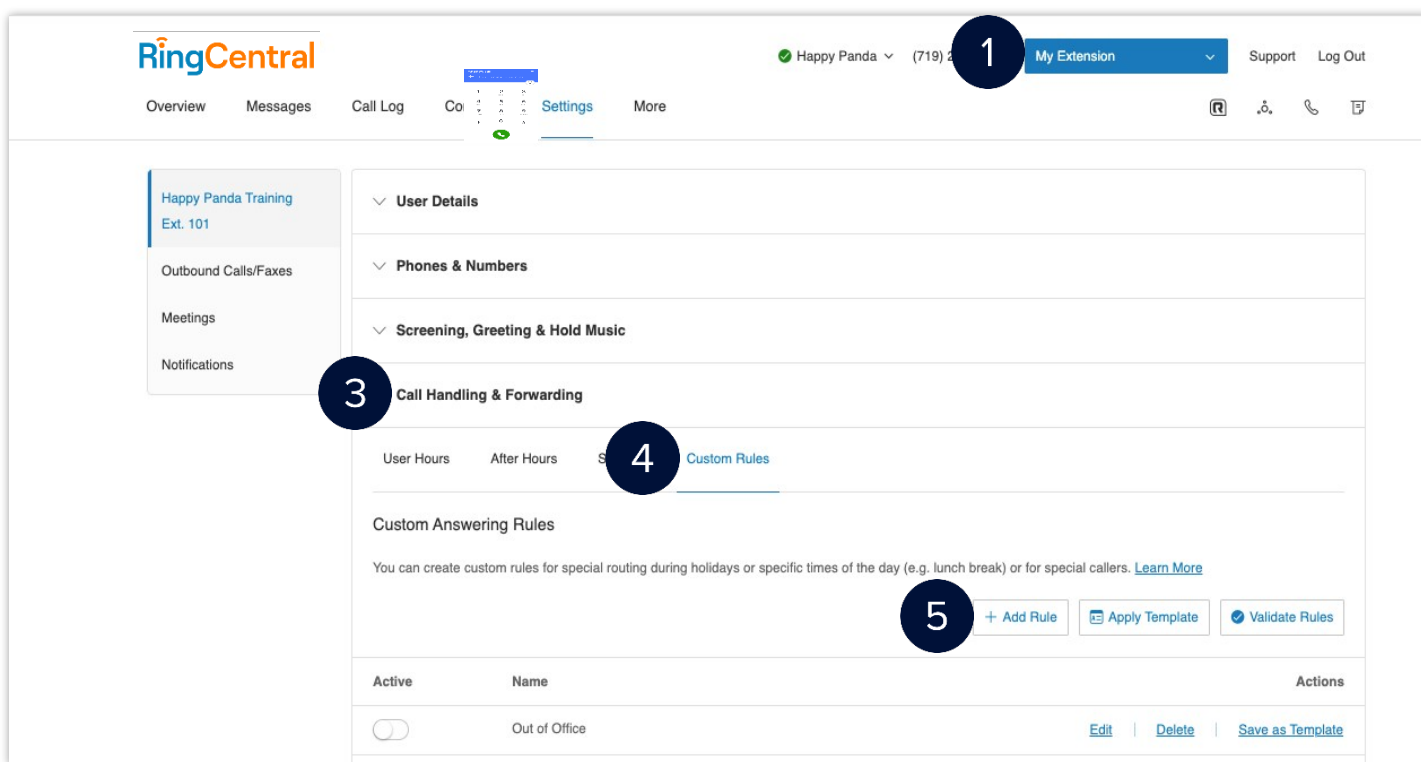
RingCentral App: Setting Up Custom Answering Rules for your Extension

Custom Answering Rules is a feature in the RingCentral app, which performs specific call handling actions based on your defined conditions. This saves you time and effort in reconfiguring the standard call handling settings, just to meet specific conditions.

Example: Forwarding your extension’s incoming calls directly to your voicemail during your lunch breaks or holidays.

You may need additional permissions from your account’s administrator to be allowed to configure your Custom Answering Rules.

1. Access your RingCentral Online Account’s **My Extension** view.
2. Click **Settings**.
3. Click **Call Handling & Forwarding**.
4. Select **Custom Rules**.
5. Click **Add Rule**.
6. Type your preferred Custom Answering Rule name.
7. Click **Next**.



RingCentral App | Setting Up Custom Answering Rules for Your Extension

Home Users Phone System Meetings Reports Billing More

Custom Answering Rule

1 Name Rule 2 Define Conditions 3 Define Call Handling

Enter a descriptive name for the rule.

Your Rule Name

My Rule 1

Next

8. 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 numbers or use 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 and/or time ranges.

Custom Answering Rules are applied before your User Hours and After Hours call handling rules.

9. Click **Next**.

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Home Users Phone System Meetings Reports Billing More

Custom Answering Rule

✓ Name Rule 2 Define Conditions 3 Define Call Handling

Caller ID None

Called Number None

Date and/or Time None

Next

10. Select your preferred condition/s for your Custom Answering Rule, you can select multiple conditions simultaneously.
 - a. **Forward Calls** – Forwards your calls to a single or multiple phone number in a specific order and have your RingCentral greeting and voicemail settings apply.
 - b. **Take Messages Only** – Sends all callers to voicemail.
 - c. **Play Announcement Only** – Plays a pre-recorded announcement and end the call afterward.
 - d. **Unconditional Forwarding** – Unconditionally forwards a call to a specific phone number, none of your RingCentral greetings, voicemail, or other call handling settings apply once the call has been forwarded.

RingCentral App | Setting Up Custom Answering Rules for Your Extension

11. Click **Save**.

Custom Answering Rule

✓ Name Rule ✓ Define Conditions **10** Define Call Handling

Select action to take when incoming calls match this rule

- Forward Calls **a**
- Take Messages Only **b**
- Play Announcement Only **c**
- Unconditional Forwarding **d**

Screening, Greeting & Hold Music

User Greeting
 Enable

Call Screening
 Enable

Connecting Message
 Enable
Default
00:00 / 00:00
Default Message: "Please hold while I try to connect you."
Edit

Audio While Connecting
 Enable
Music: Acoustic
00:00 / 00:00
Music or Ringtone callers will hear while connecting
Edit

Hold Music
 Enable
Music: Acoustic
00:00 / 00:00
Edit

Call Handling

Messages

11 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.

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 Apply Template Validate Rules		
Active	Name	Actions
<input type="checkbox"/>	Out of Office	Edit Delete Save as Template



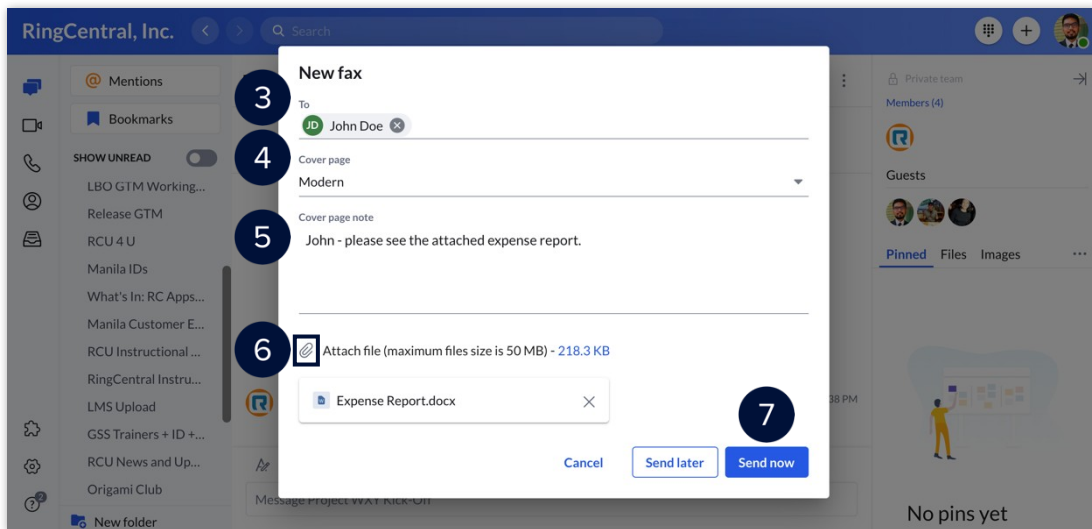
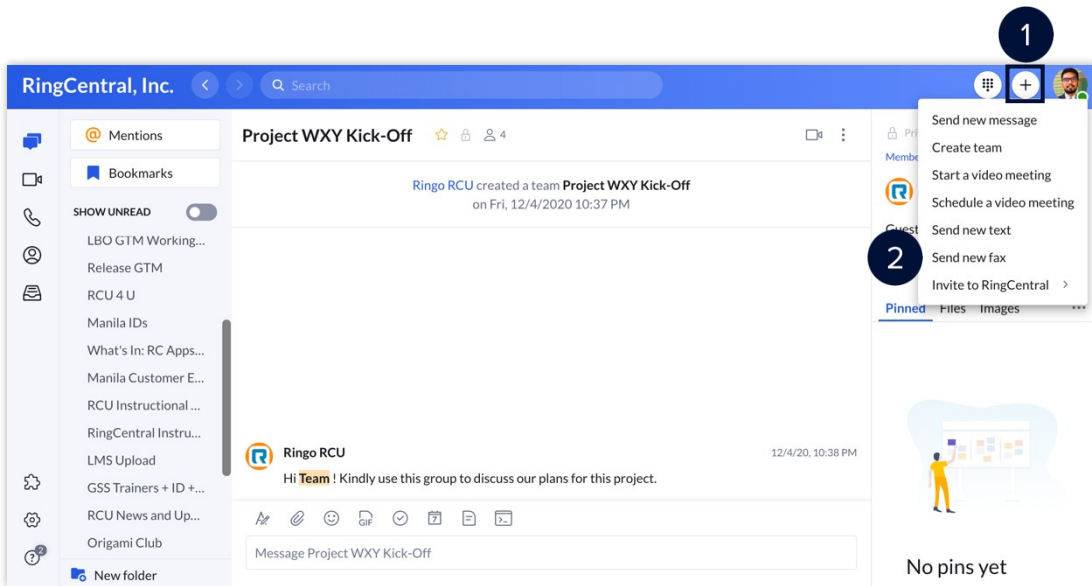
RingCentral App: Sending Faxes

Stay organized and eliminate the need to print out documents to send faxes. This job aid shows you how to setup, 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:

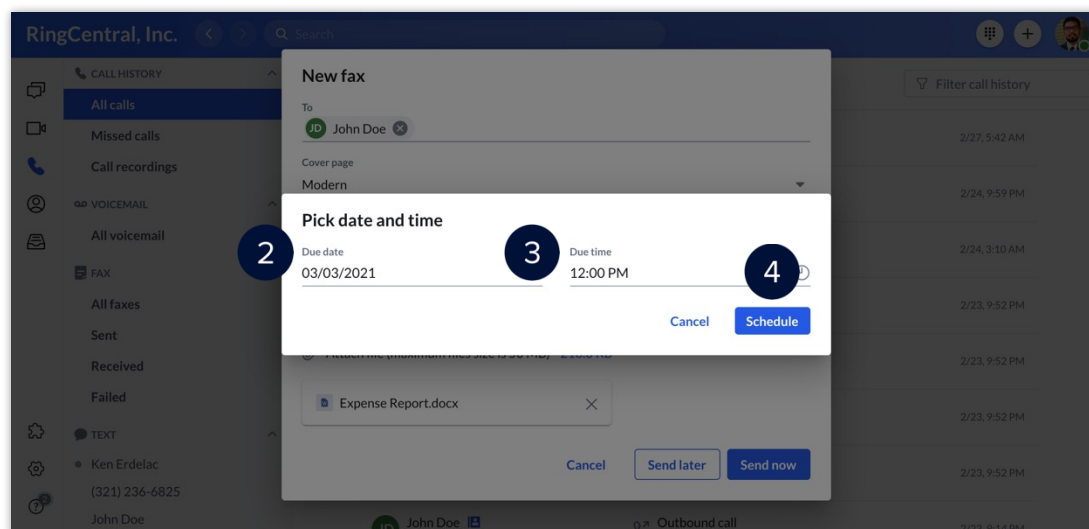
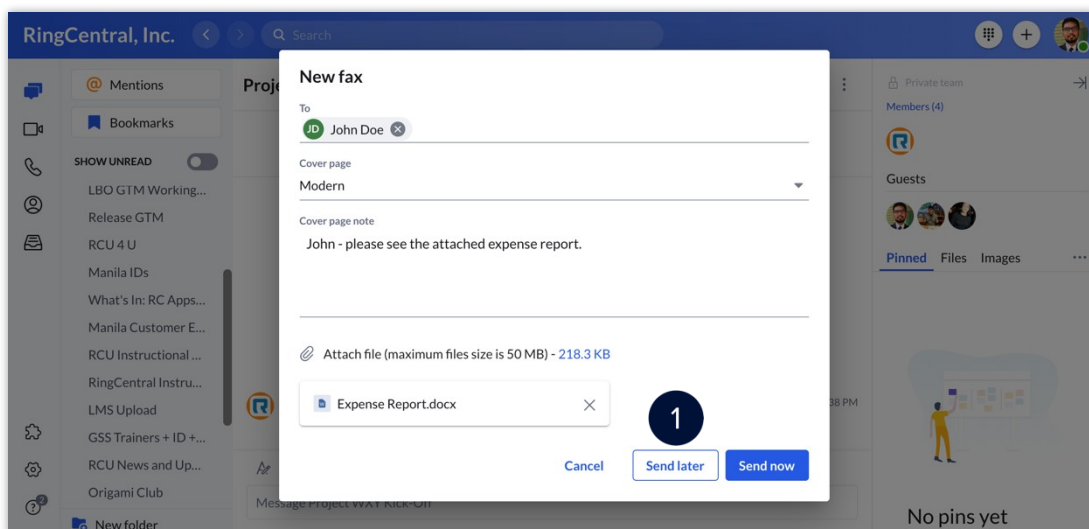
1. Click **New Actions**.
Note: Users can also click the *Phone Fax Text* tab then *New fax*.
2. Click **Send new fax**.
3. Enter the recipient's contact name or fax number.
4. Select your preferred **Cover page**, you can choose **None**, if you don't want to include a cover page.
5. Include a **Cover 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**.

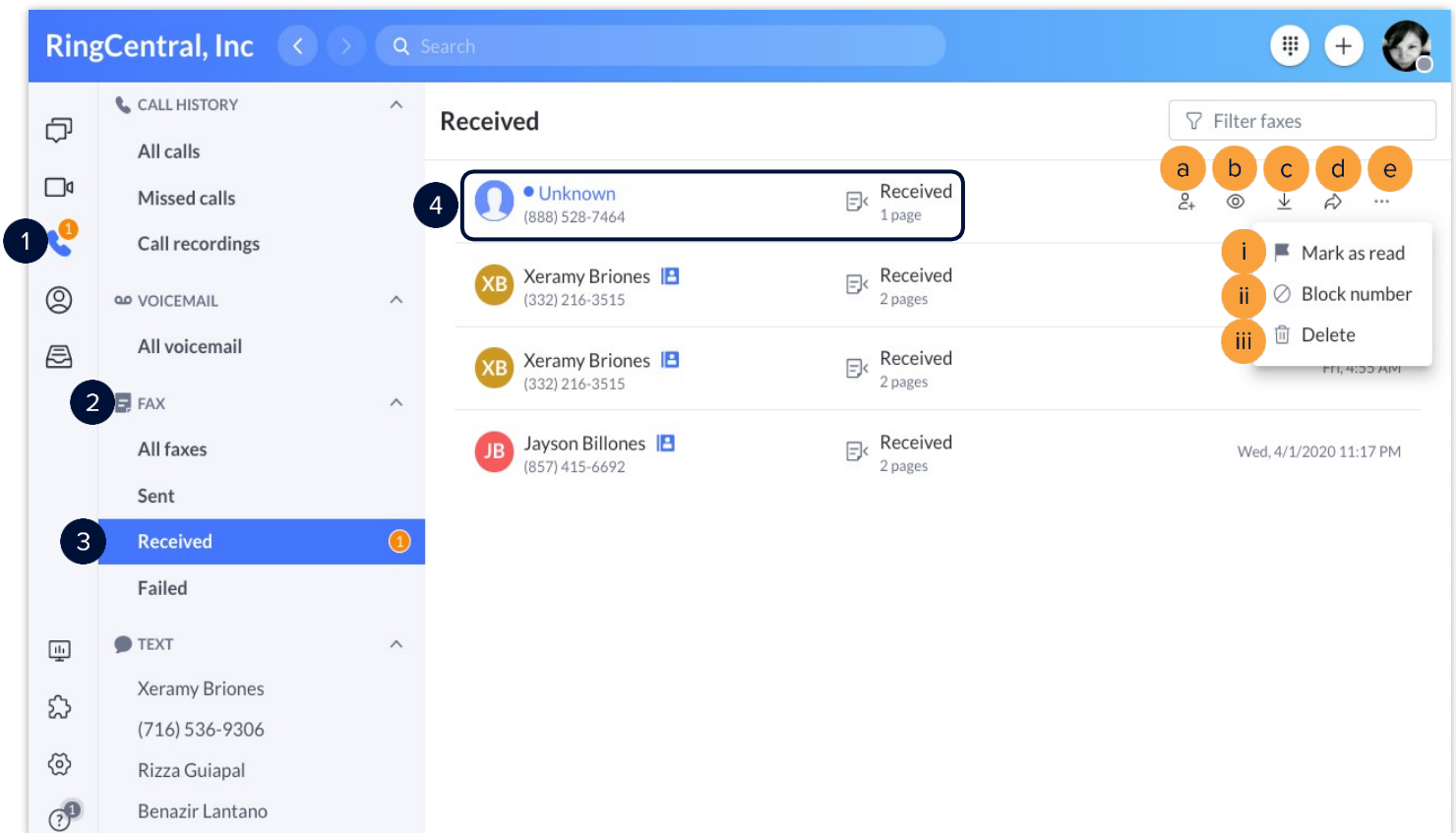
RingCentral App: Receiving Faxes

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:

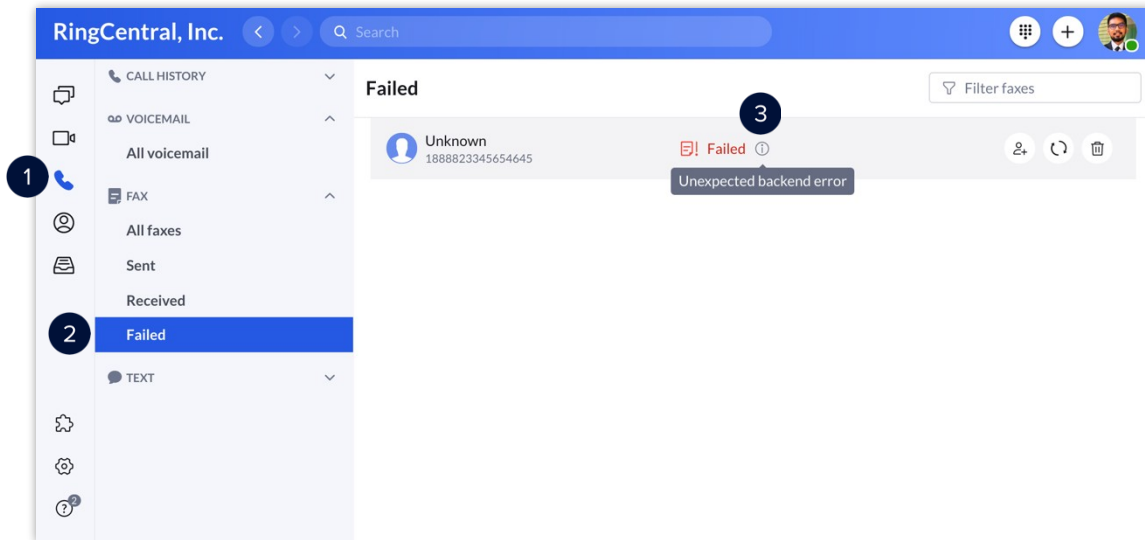
1. Click the **Phone** icon.
2. Click FAX.
3. Select **Received**.
4. Hover your mouse over your preferred fax message to display a series of icons you can select to perform:
 - a. **Add Contact:** Allows you to add an unknown number or contact.
 - b. **View:** Preview of the fax.
 - c. **Download:** 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

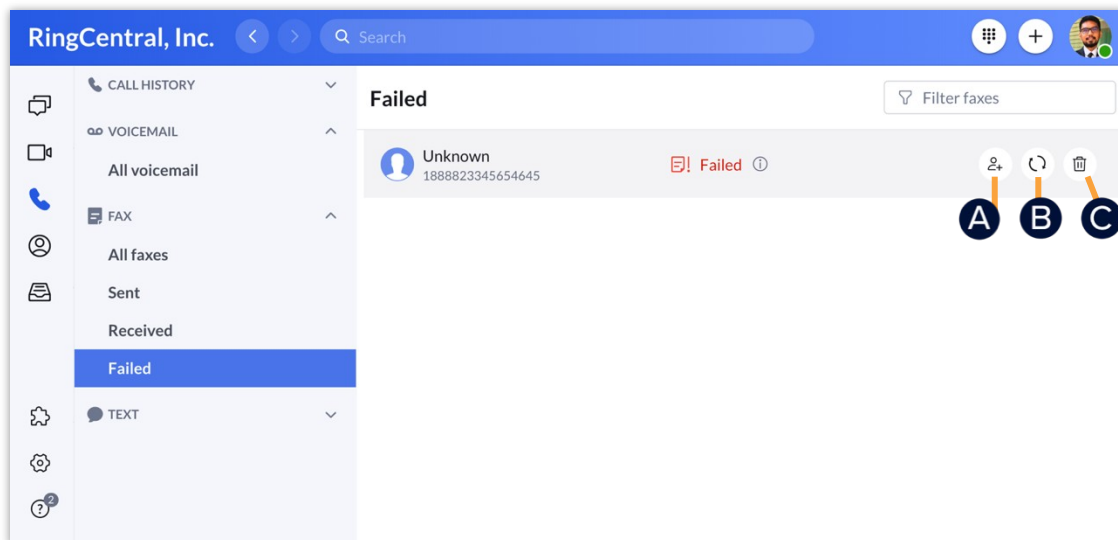
A fax transmission Failed status indicates that the fax failed to send. Follow the steps below to access the failedfaxes menu.

1. Click the **Phone Fax Text** 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, xlsx)
 - 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** or less, which can cause delays or failures in receiving faxes from RingCentral.



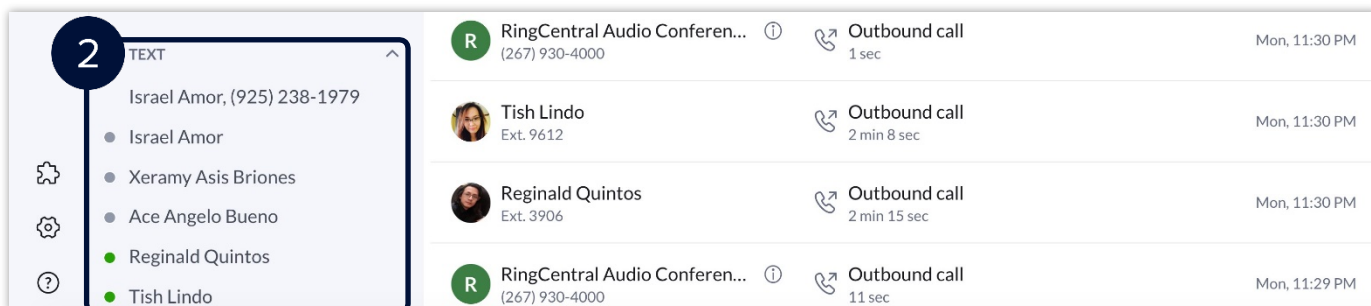
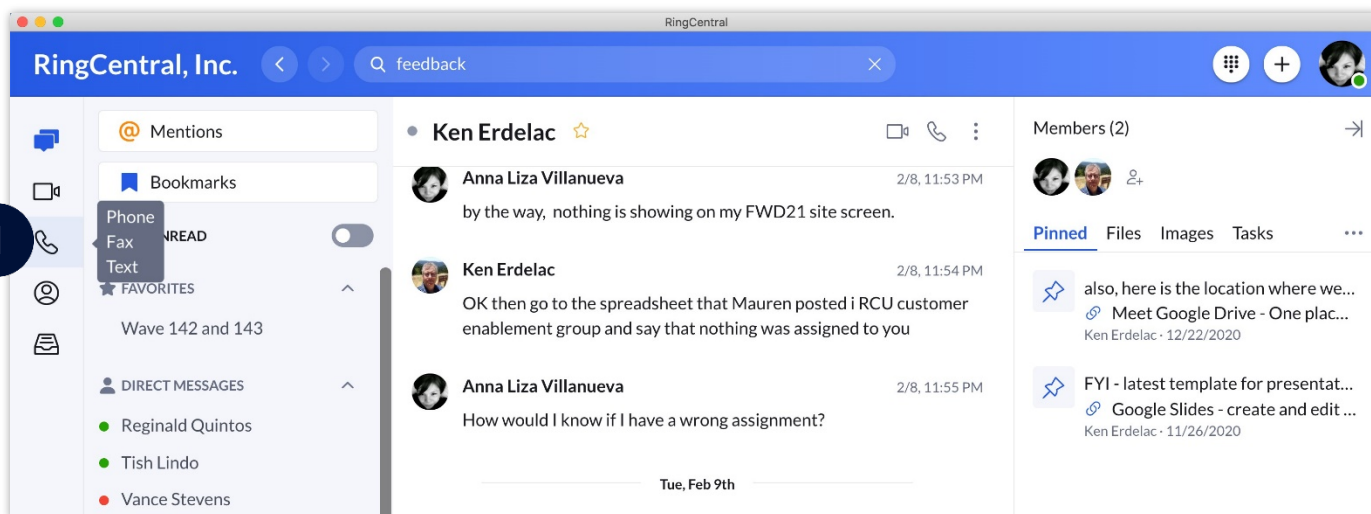
TEXT

RingCentral App: Sending Text Messages

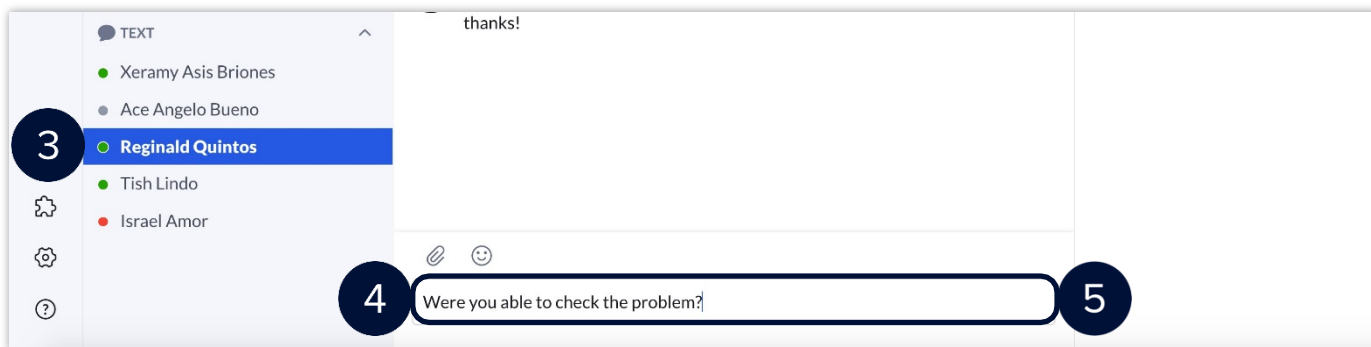
The RingCentral app lets you send individual and group text messages to anyone, so you can communicate with people who don't have the RingCentral app installed.

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.



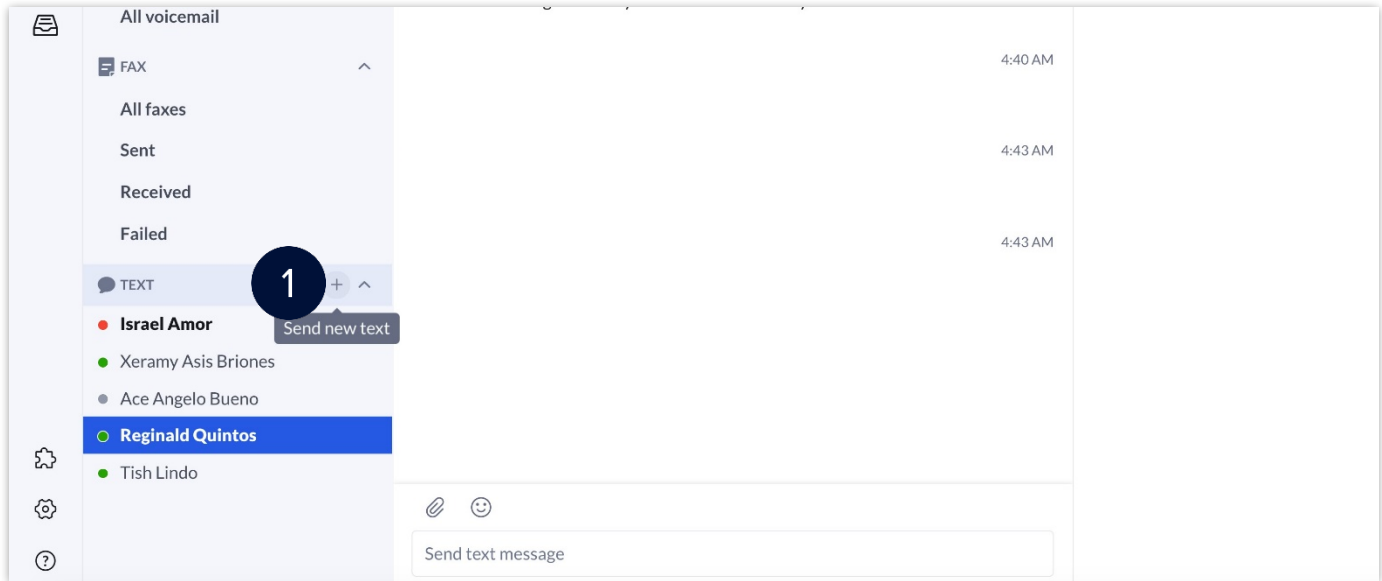
Sending a text message

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

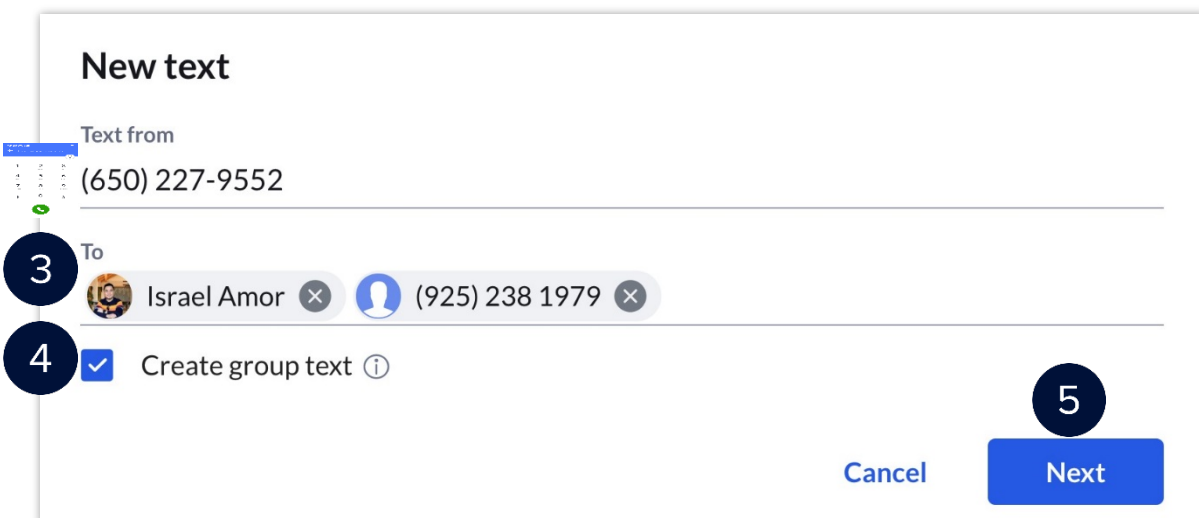
- Send a text message via the **Send new text** button in the Phone menu.
- Send a text message via the **New actions** button at the top right.

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:

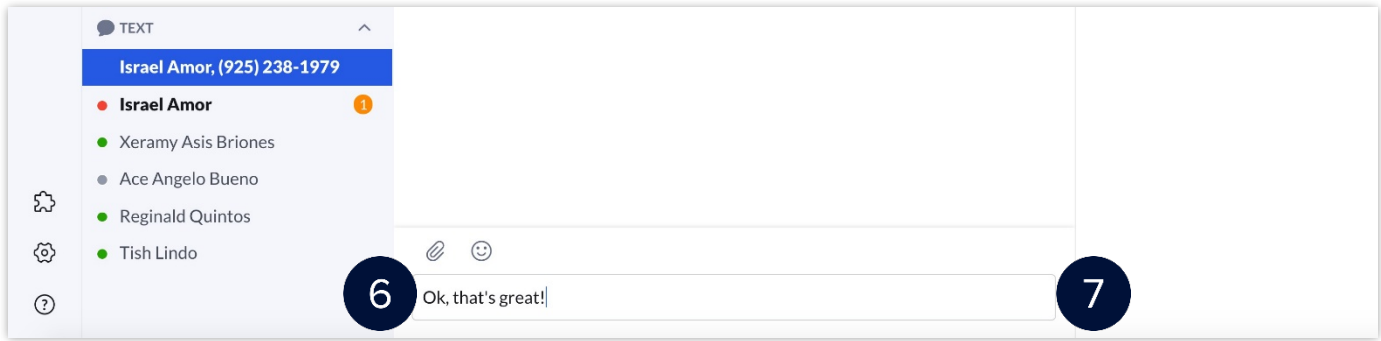
1. Click **Send new text**.



2. If there are several SMS-enabled phone numbers assigned to your extension, choose the appropriate 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 a group 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.



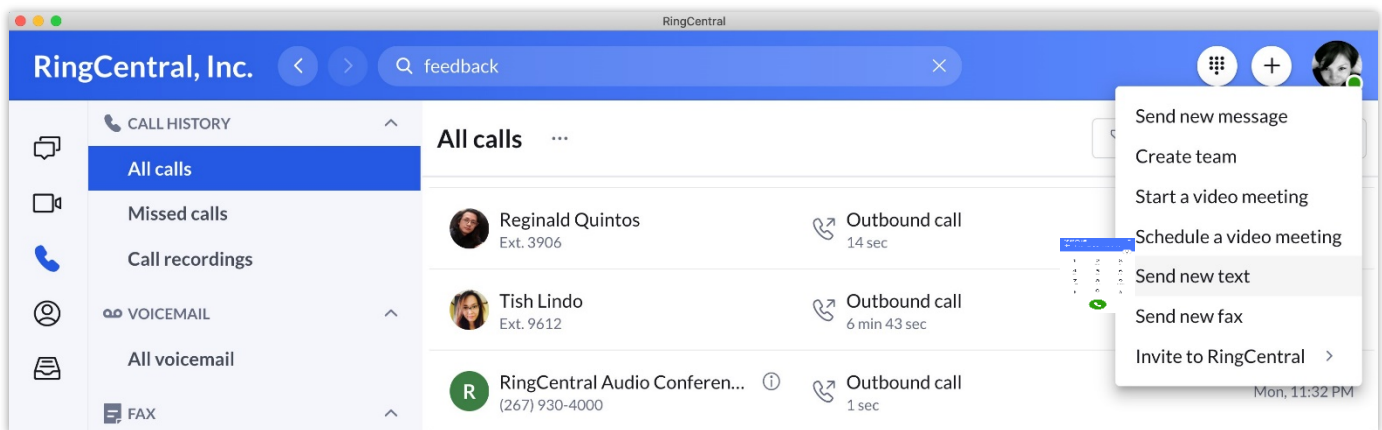
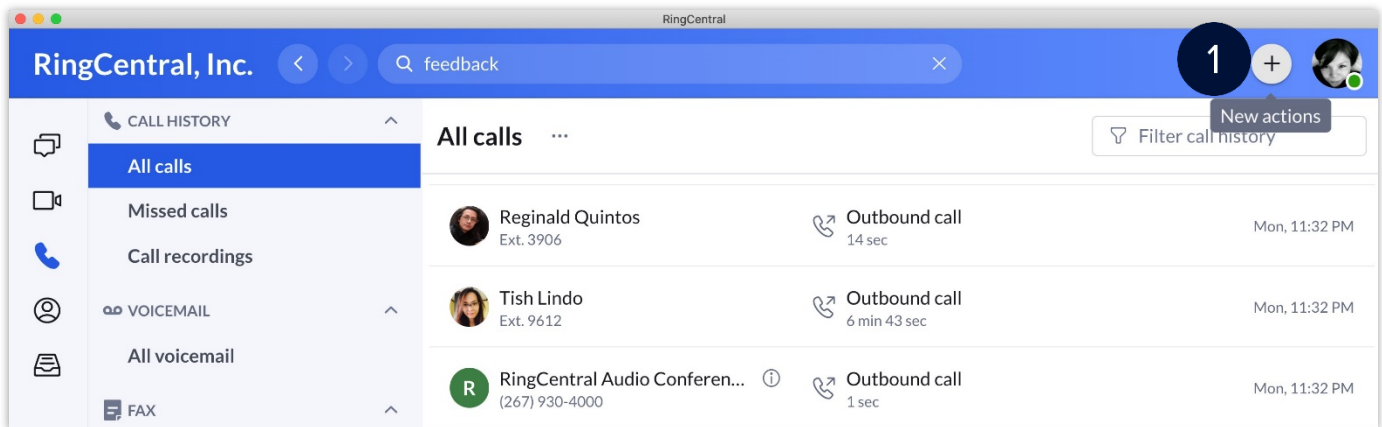
RingCentral App | Sending Text Messages



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.



RingCentral App: Texting

Frequently Asked Questions

This job aid provides answers to the RingCentral Business SMS / MMS feature's frequently asked questions. Access to the SMS / MMS feature depends on your account permissions and service region, contact your system administrator for more information.

1. What is RingCentral Business SMS / MMS?

- RingCentral Business SMS / MMS enables you to send and receive text messages and multimedia files with your business number, eliminating the use of multiple numbers as you have one number for MMS, voice, fax, and text messaging.

Note: *MMS is currently not supported in Canada.*

2. Is SMS supported for toll-free Canada numbers?

- Yes, SMS is available for toll-free Canada numbers.

3. How do I activate RingCentral Business SMS / MMS?

- RingCentral Business SMS / MMS is automatically activated for RingCentral Office customers.

4. Is RingCentral Business SMS / MMS free?

- Yes, this is a free feature for RingCentral Office customers.

5. What are the requirements for sending SMS / MMS messages?

- In order to send SMS/MMS messages, the following are required:
 - An active RingCentral US/Canada Office plan (RingCentral Office All-in-One Standard, Essentials, Standard, Premium or Ultimate)
 - Extension includes an assigned Direct Local Number or Digital Line

Note: *SMS/MMS is currently not available for RingCentral UK accounts.*

6. Can I send SMS / MMS if my extension does not have an assigned number?

- If your extension does not have a Direct Local Number or Digital Line assigned, you can only send a text message to a user's extension within your RingCentral account.

7. What devices can I use for sending and receiving SMS / MMS?

- You can send and receive SMS / MMS on computers, smartphones, and tablets.

8. Can I use my toll-free number to send SMS / MMS?

- Yes, outbound SMS is supported. Sending/receiving MMS for toll-free numbers is currently not supported.

9. Can I send International SMS and MMS messages?

- Yes, this is available for RingCentral Office US and Canada (International SMS only) accounts. Note that your account's international calling option must be enabled to use this feature.

10. Can I send SMS / MMS to a Group?

- Yes, you can send a group SMS / MMS to up to 10 people using the RingCentral app.

11. Is there a limit to the number of recipients I can send an SMS / MMS?

- There is a maximum of 50 recipients per SMS / MMS.

12. Is there a maximum number of characters that I can send per SMS?

- There is a maximum of 1,000 characters per message.

13. What are the files supported for sending and receiving MMS?

- The following file types are supported for sending and receiving MMS.

- **RingCentral App for Mobile**

- ▶ Incoming:

- Images: jpg/jpeg, png, gif, bmp, tif/tiff, svg
- Videos: 3gp, mp4, mpeg, avi, wmv, mov, flv
- Audio: mp3
- Files: vcf/vcard, zip, rtf, gzip, html, txt

- ▶ Outgoing:

- Images: jpg/jpeg, png, gif, bmp, tif/tiff
- Videos: 3gp, mp4, mpeg, flv, wmv, mov
- Audio: mp3
- Files: vcf/vcard, zip, rtf, html

- **RingCentral App for Desktop**

- ▶ Incoming:

- Images: jpg/jpeg, png, gif, bmp, tif/tiff, svg
- Videos: 3gp, mp4, mpeg, flv, wmv, mov, avi
- Audio: mp3
- Files: vcf/vcard, zip, rtf, html, txt

- ▶ Outgoing:

- Images: jpg/jpeg, png, gif, bmp, tif/tiff, svg
- Videos: 3gp, mp4, mpeg
- Audio: mp3
- Files: vcf/vcard, zip, rtf

14. Can I block numbers from sending me an SMS / MMS?

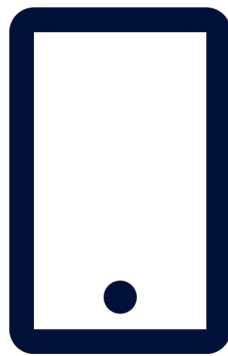
- The option to block SMS or MMS is currently unavailable. Submit feature requests to community.ringcentral.com.

15. Can I disable the RingCentral Business SMS or MMS feature?

- Yes. To disable the RingCentral Business SMS or MMS feature on one or multiple RingCentral local numbers on your account, please contact [RingCentral Customer Support](#).

16. If I transfer my number from another carrier to RingCentral, how long does it take before RingCentral Business SMS gets activated?

- RingCentral Business SMS activation (for RingCentral Office plans) can take from 72 hours, up to five additional business days after your number is transferred.



MOBILE

RingCentral App: Mobile Basics

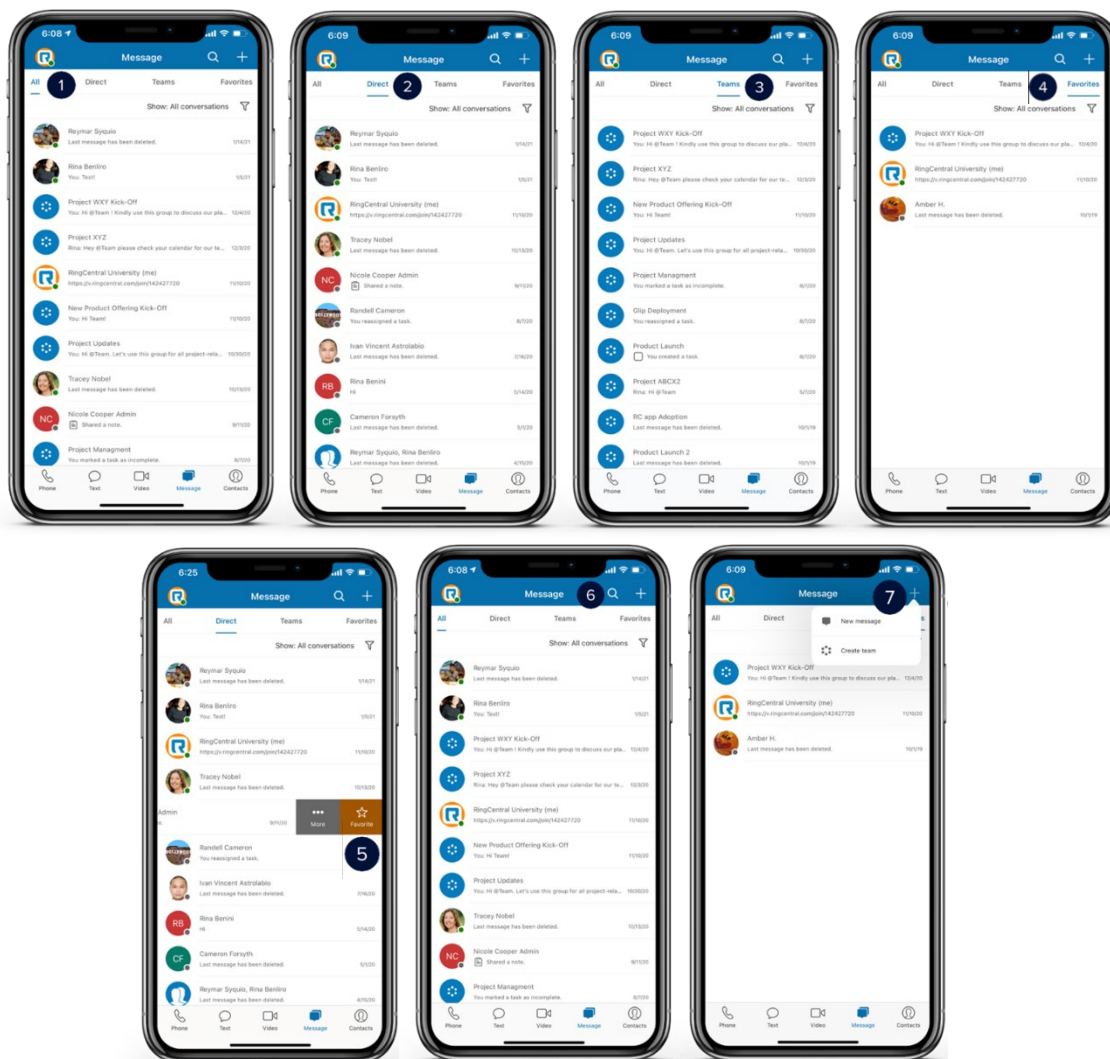
RingCentral app for mobile provides a feature-rich user experience. It keeps you connected anytime, anywhere. It allows you to always be on top of the conversation and be productive even when you are on-the-go.

You can access and configure the following when you open the RingCentral app on your iOS or Android device.

Message

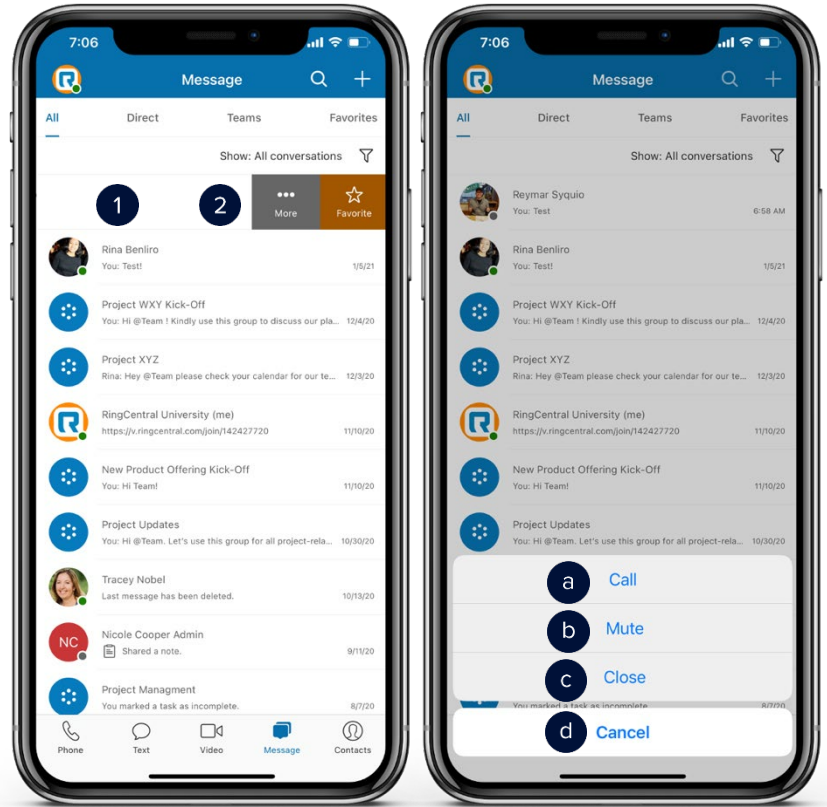
Message shows all messages from individuals or your groups.

1. **All** shows all active conversations.
2. **Direct** filters messages from individuals.
3. **Teams** shows messages sent to your groups.
4. **Favorites** shows messages from individuals or groups you tagged as favorite.
5. To add an individual or a team to your favorites, swipe left on the conversation and tap **Favorite**. Tap the **Search** icon to look up a message or a contact.
6. Tap the **plus (+)** icon to create new messages or teams.

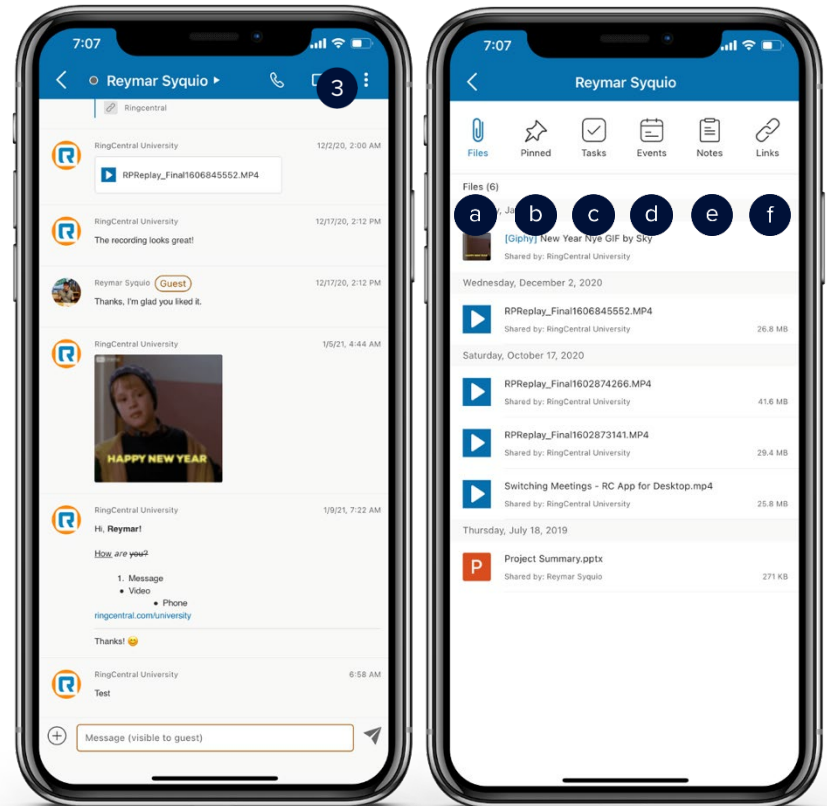


Message tips

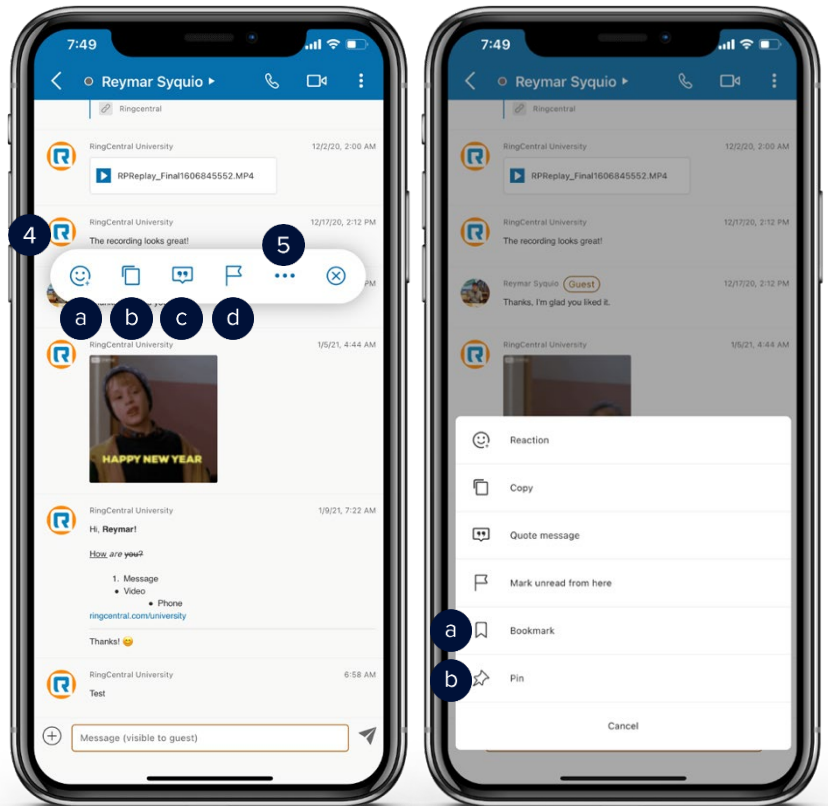
1. Swipe left on a conversation.
2. Tap **More**. The following options appear:
 - a. **Call** – call the contact
 - b. **Mute** – disable notifications from the conversation
 - c. **Close** – hide the contact from the active messages list (iOS only)
 - d. **Cancel** – return to the list of conversations



3. When in a conversation, tap the **ellipsis** icon to see the following:
 - a. Files
 - b. Pinned messages
 - c. List of tasks
 - d. Scheduled events
 - e. Written notes
 - f. Shared links



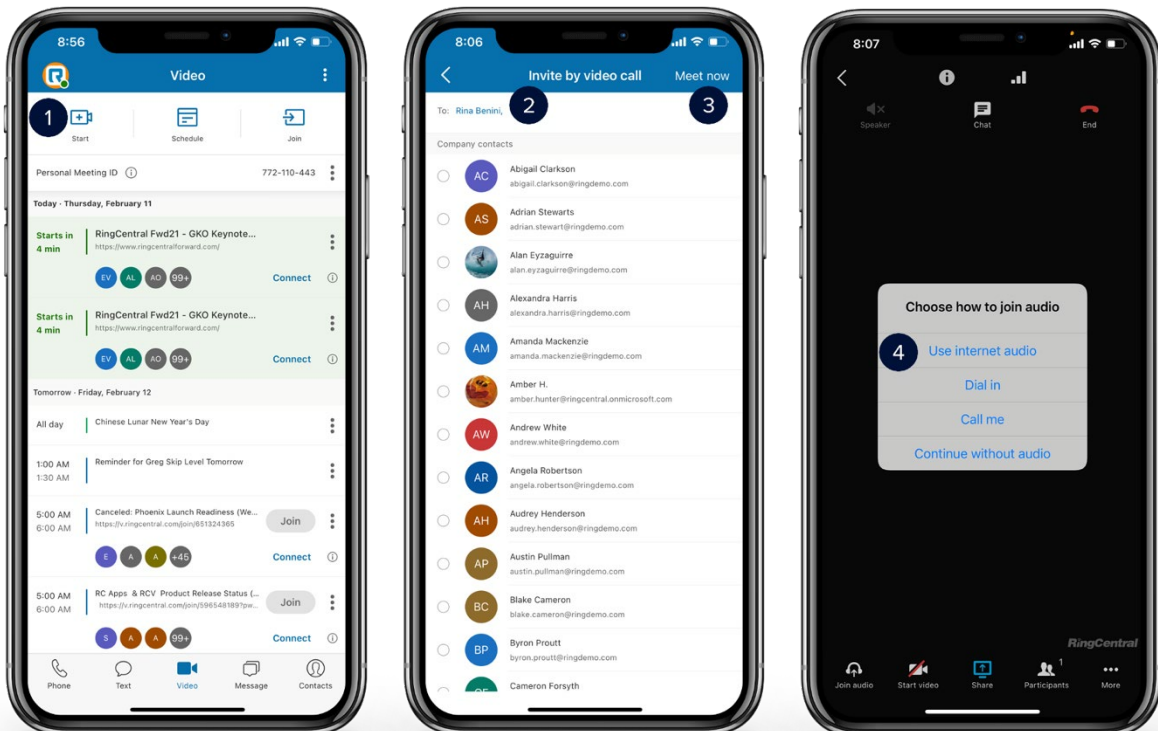
4. Tap and hold a message. The following options appear:
 - a. React with an emoji
 - b. Copy
 - c. Quote and reply
 - d. Mark as unread
5. Tap the **ellipsis** icon to show more options:
 - a. Bookmark
 - b. Pin



Video – starting a meeting

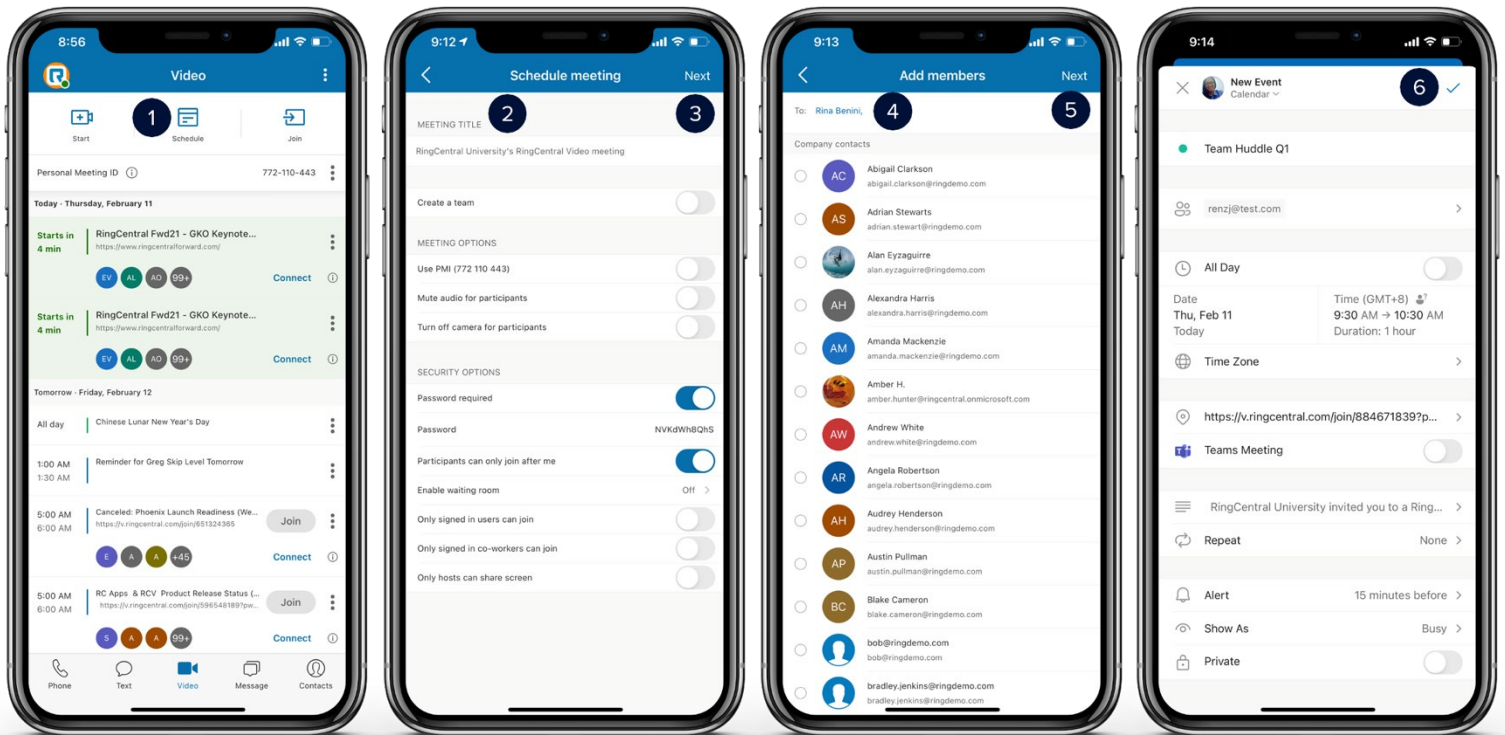
Start, join, and schedule a meeting in an instant under the Video tab.

1. To start a video meeting, tap **Start**.
2. Enter the names or choose your participants from your contacts list.
3. Tap **Meet now**.
4. Choose how you want to join audio.



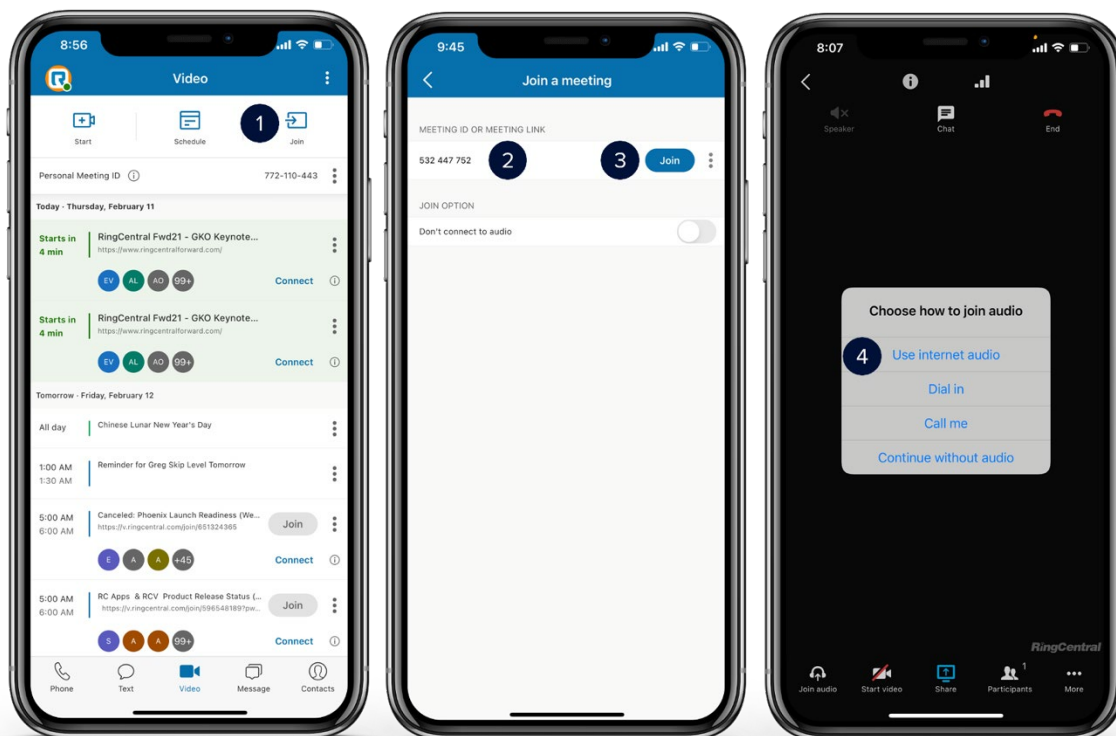
Video – scheduling a meeting

1. To schedule a video meeting, tap **Schedule**.
2. Set the meeting options as necessary.
3. Tap **Next**.
4. Enter the names or choose your participants from your contact list.
5. Tap **Next**. Your default email calendar opens. Complete the meeting details
6. Tap the **check** icon on the top right corner. Your meeting is now scheduled and should appear on your calendar.



Video – joining a meeting

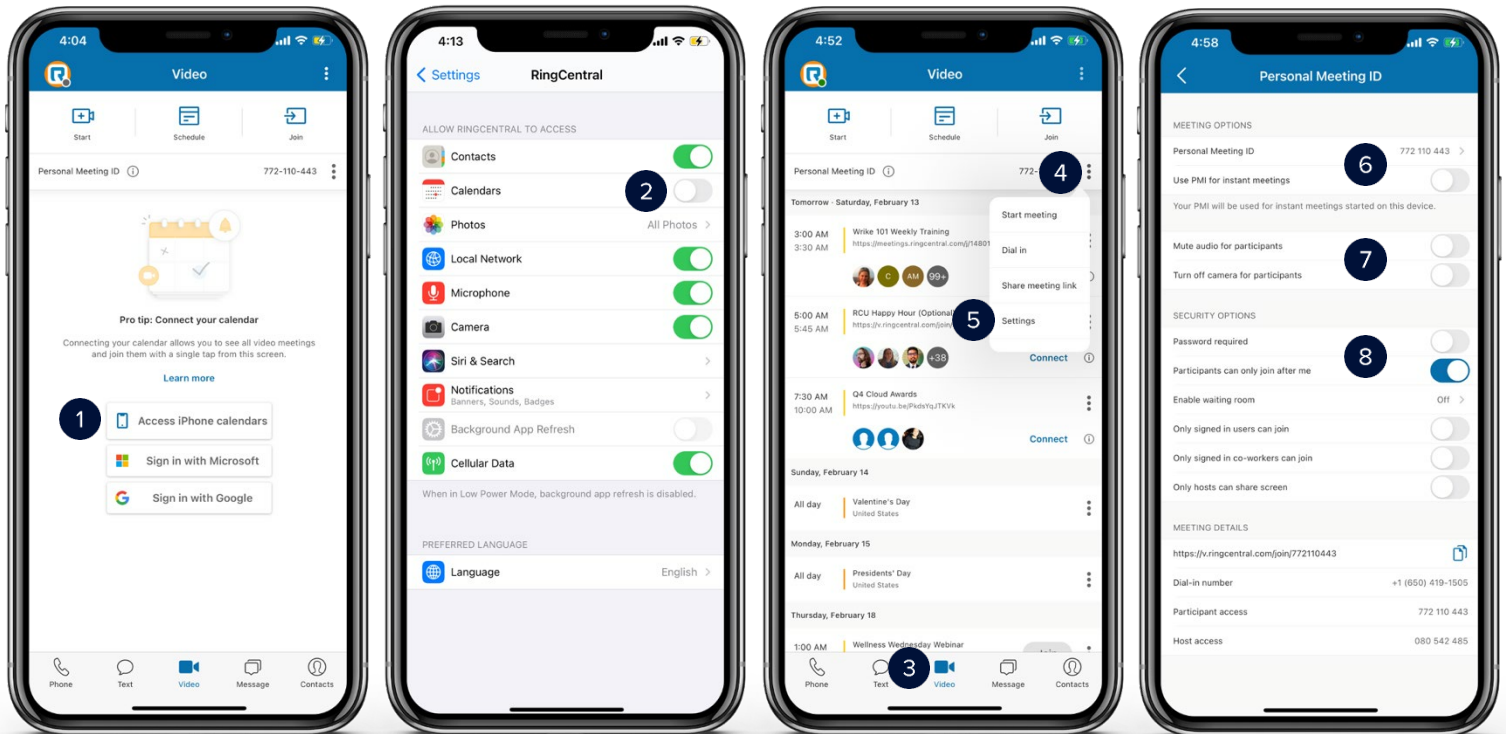
1. To join a meeting, tap **Join**.
2. Tap and paste the meeting ID or meeting link.
3. Tap **Join**.
4. Choose how you want to join audio.



Video tips

Connect your calendar to see all video meetings and join them with a single tap.

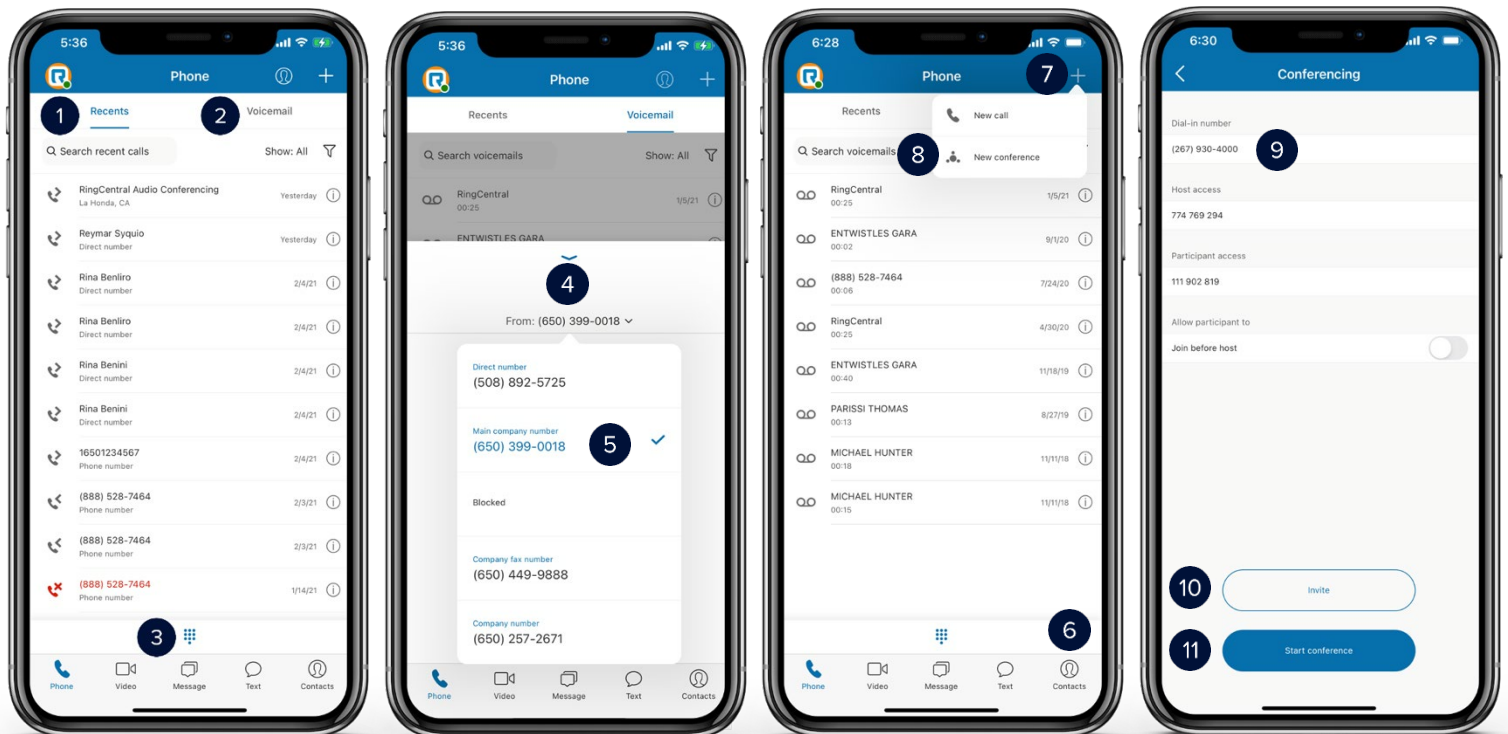
1. If your calendar is not yet connected to the RingCentral application, synchronize your calendar with the RingCentral app. You can select which calendar you want to connect. In this example, tap **AccessiPhone calendars**.
2. This opens the permission settings of your phone. Enable **Calendars**.
3. Relaunch the RingCentral app and tap **Video**. Your scheduled events now show in Video.
4. Tap the **ellipsis** icon.
5. Select **Settings**.
6. Create an easy to remember **Personal Meeting ID (PMI)**. Enabling Use PMI for instant meetings uses this PMI in future meetings started on this device.
7. You can mute the audio and/or turn off the camera for your participants when they join your meetings.
8. Configure your meeting security options as you see fit. You can set a password to the meeting.



Phone

Access your call logs and voicemails and start conference calls in the Phone tab.

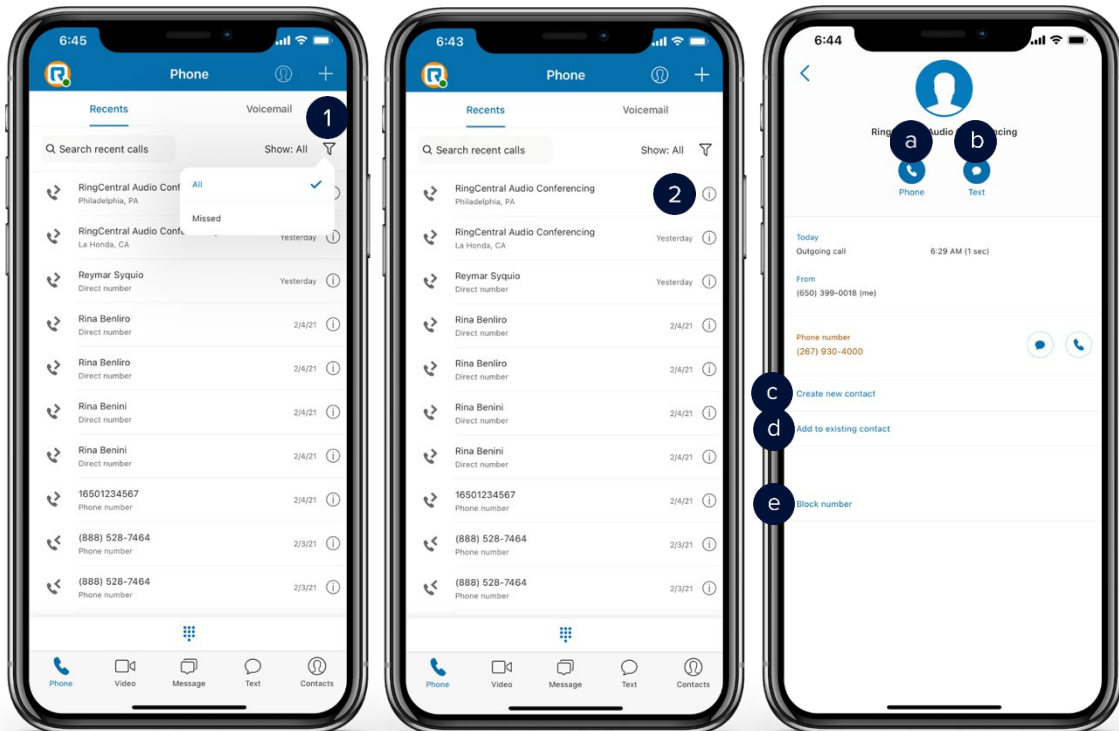
1. **Recents** – shows all incoming and outgoing calls
2. **Voicemail** – shows voicemail messages
3. Tap **Dialpad**. This allows for manually dialing numbers.
4. Tap the **From** drop-down menu.
5. Select the caller ID you want to use for the outgoing call, then dial the number.
6. Alternatively, **Contacts** allows for searching company contacts.
7. Tap the **plus (+)** icon on the upper right corner.
8. Select **New conference**. This is also another way to place a new call.
9. Complete the conference call details.
10. Tap **Invite** to invite participants via message, text, or email.
11. Tap **Start conference**.



Phone tips

Make calls, send messages, and set video meetings from the Recents and Voicemail tabs.

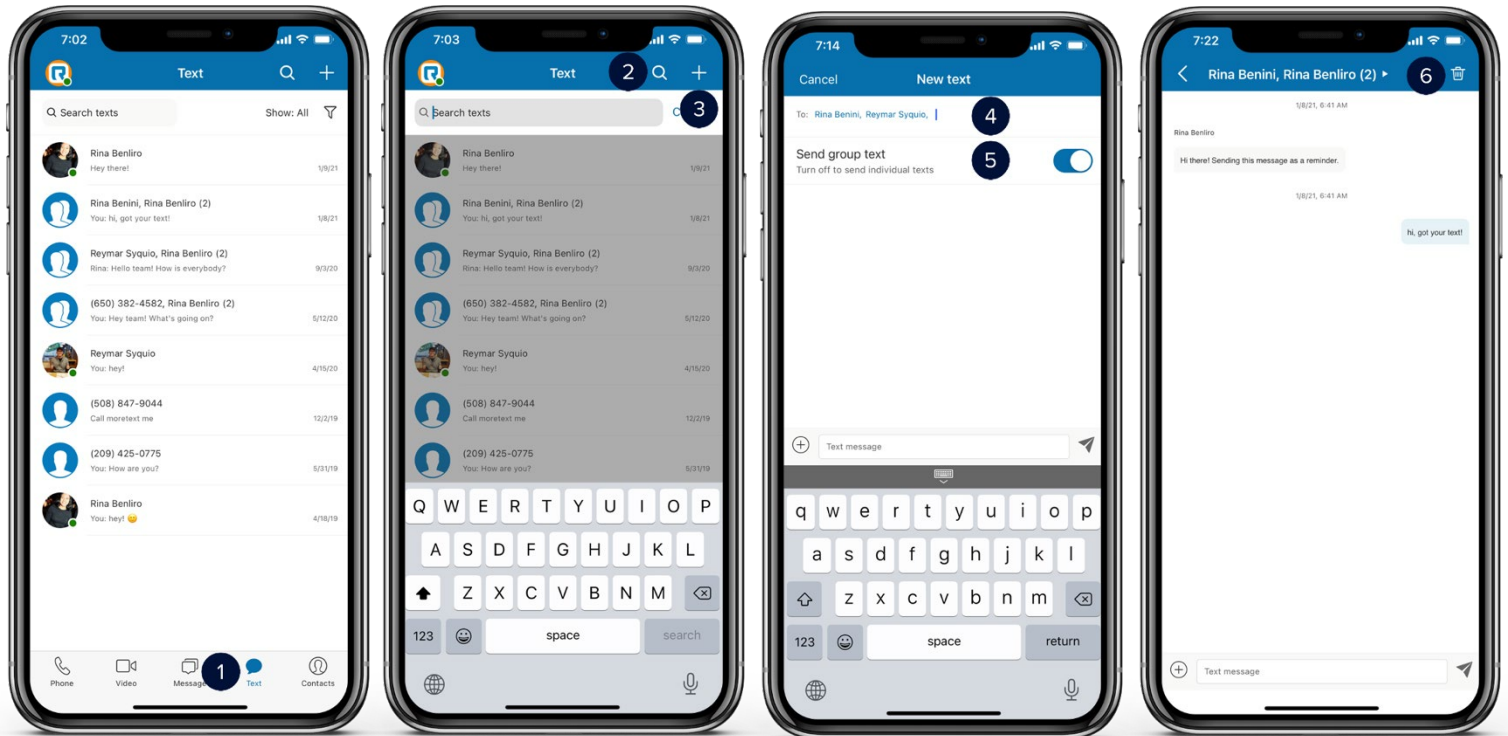
1. Tap the **Filter** icon to filter missed calls or unread voicemails.
2. Tap the **Info** icon next to the time or date of a call or voicemail. The following options appear:
 - a. Phone – call the number
 - b. Text – send a text message
 - c. Create new contact
 - d. Add to existing contact
 - e. Block number



Text

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

1. Tap **Text** to see your text messages.
2. Tap the **Search** icon to search a specific text or contact.
3. Tap the **plus (+)** icon to start sending an SMS.
4. Type the phone number or name of the party you wish to send an SMS.
5. You have the option to send group or individual texts.
6. To delete a message, select a conversation and tap the **Delete** icon.

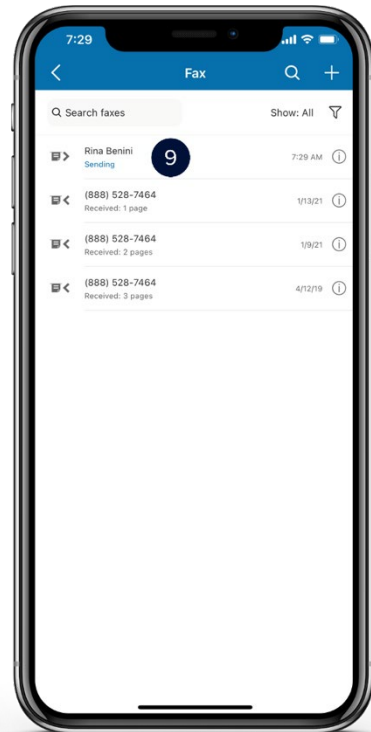
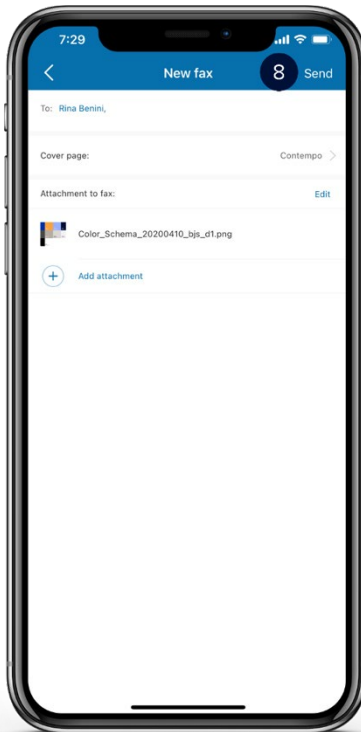
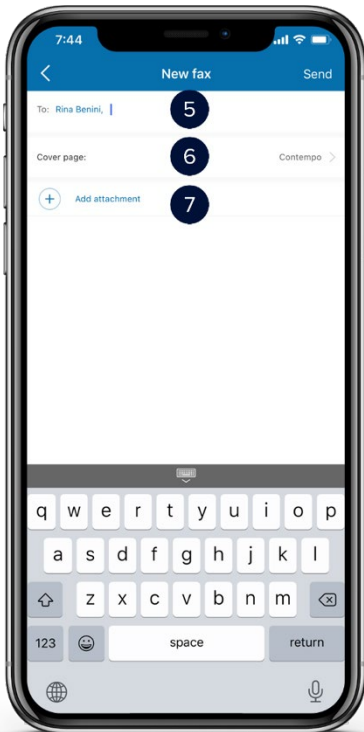
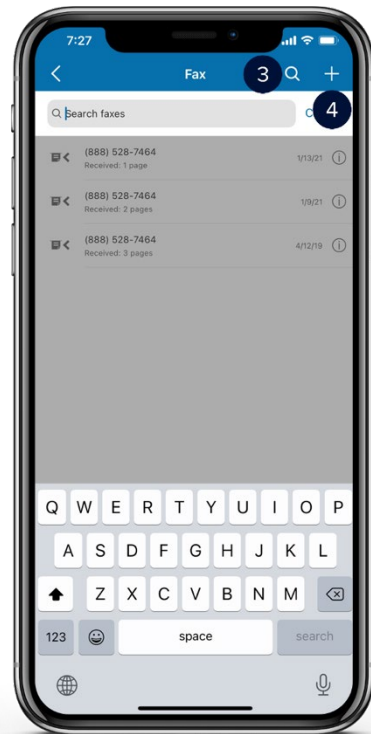
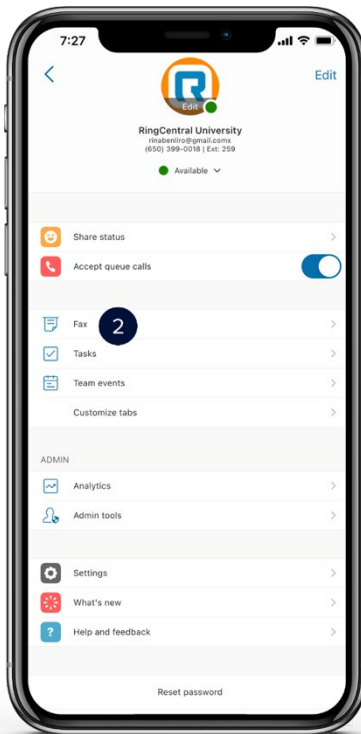
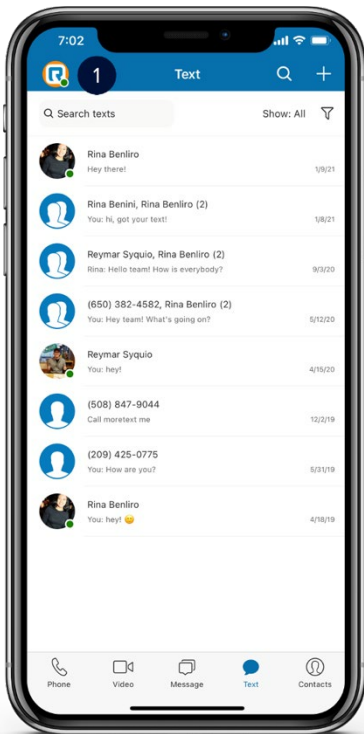


FAX

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

1. To access your fax messages, tap your **profile picture**.
2. Tap **Fax**.
3. Tap the **Search** icon to search a fax message or a number from your fax messages.
4. Tap the **plus (+)** icon to compose a fax.
5. Type the fax number or name of the person you wish to send a fax message to.
6. Select a **cover page**. The options depend on your fax message.
7. Tap **Add attachment** to attach files or photos.
8. Review your fax message, then tap **Send**.
9. The fax message appears on the list of your fax messages while sending.

RingCentral App | Mobile Basics





**End of
Document**