RingCentral app

Desktop and web

Getting Started Guide

RingCentral

Table of contents

Introduction

The RingCentral app allows you to seamlessly transition between team messages, video meetings, and phone calls on the web or your desktop and mobile device, allowing you to connect with others wherever you are. The main features of the RingCentral app include:

- Message
- Video
- Phone
- Contacts
- Messaging notification apps and app integrations

Requirements

Desktop System Requirements

- Windows 10 or later
- Mac OS X 10.13 High Sierra or later
- Intel Skylake-class 6th Gen i3, i5, i7 processor or newer / AMD Excavator-class (2015) processor or newer / Apple Silicon
- 8GB of RAM or more
- Internet bandwidth requirements:
    - For 1-on-1 video meetings, 1mbps download, and upload or more
    - For 1 to many meetings, 1.5mbps download, and upload or more
    - For 1 to many meetings using virtual background feature, 2mbps download, and upload or more
    - For audio-only meetings (camera stream turned-off), 512kbps download and upload or more

Web System Requirements

- Google Chrome: Version 78 or higher
- Mozilla Firefox: Version 68 or higher
- Safari: Version 11.1 or higher
- Microsoft Chromium Edge 80 or higher

RingCentral app components

This seamless transition between calls, meetings, and chat is made easy by the side menu bar, which you can use to navigate between the following main RingCentral app components: Message, Video, and Phone.

Let's review what you can do with each of these main components.

Message

With the Message feature, you can:

- Communicate with others one-on-one or in a team
- Add GIFs and code snippets
- Invite and communicate with guest users (users outside of your company) for free
- Share links and files
- Create and manage tasks for yourself or others
- Share important events to keep your team members informed of your activity

To learn more about what you can do with messaging, visit [Intro to Message in the RingCentral app](#).
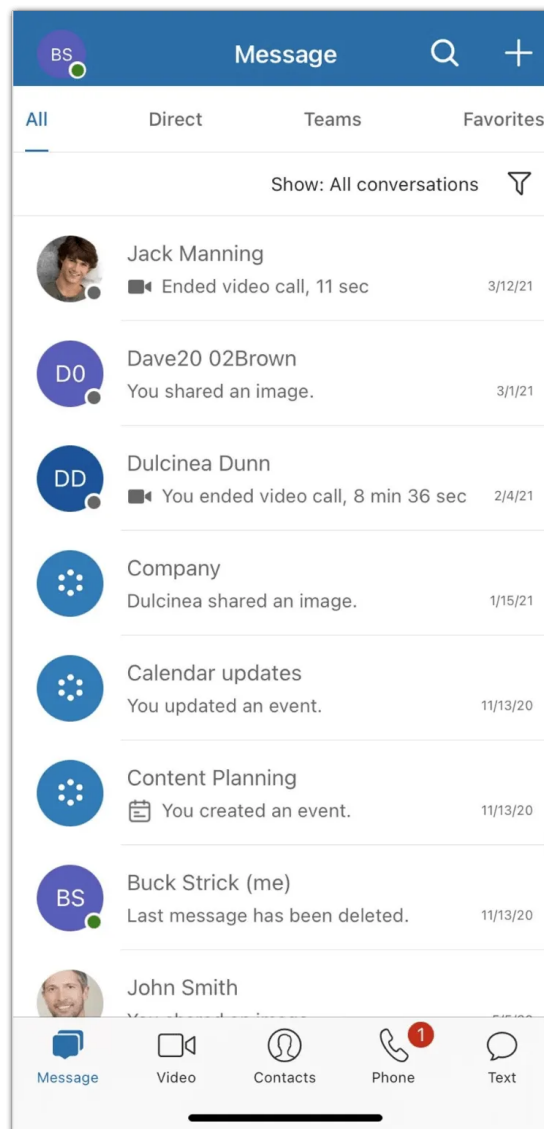
Video

With the Video feature, you can:

- Begin, join, or schedule online meetings directly in the app
- Broadcast meetings in HD quality to your computer or mobile device
- Easily switch between your desktop and mobile device while in a meeting
- Join audio through your computer or by dialing in using domestic and global numbers
- Share your screen, record, share, and playback meetings, and chat with other meeting attendees during a meeting
- Integrate your Outlook or Google calendar to join and manage meetings scheduled in your calendar
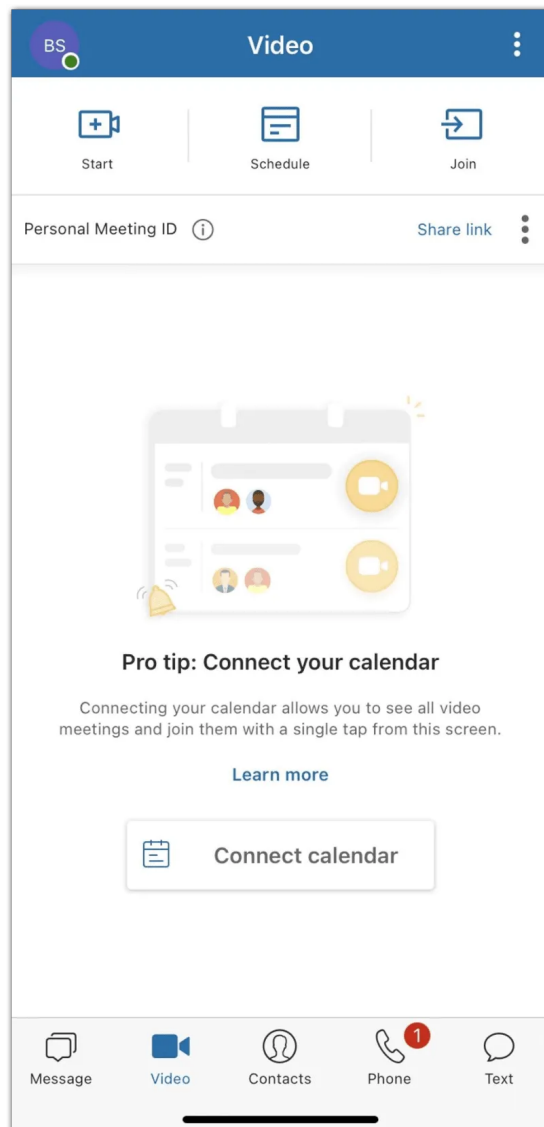
Phone

With the Phone feature, you can:

- Make or receive calls at any time locally or globally with service in over 100 countries
- Use your carrier minutes, WiFi, or cellular data without dropping a call
- Protect your data via RingCentral's encrypted and redundant data networks
- Send SMS and MMS text messages and online faxes
- Review call logs, including missed calls, call recordings, and voicemails
- Perform call controls such as Call Flip, call switch, call transfer, and call park

To learn more about what you can do under Phone, visit Intro to Phone in the RingCentral app.
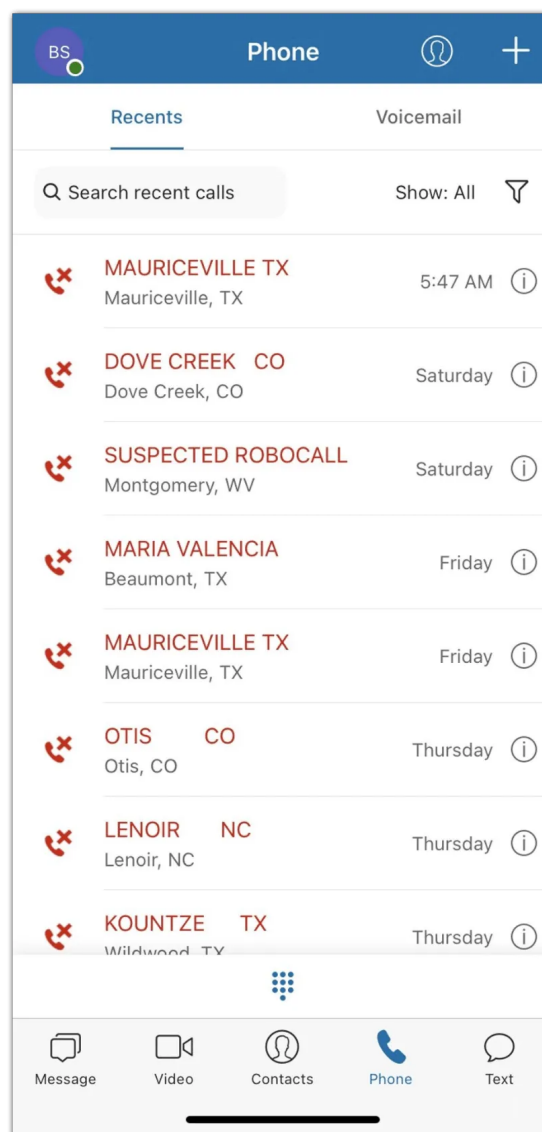
Contacts

The Contacts interface allows you to:

- Access a directory of all your RingCentral account users (both co-workers and guest users) and personal contacts, and organize your most frequent contacts in a Quick contact list
- Review a list of all your company's RingCentral app teams
- View a user's profile and perform app actions such as sending a direct message, starting a video meeting, and calling
- Manage RingCentral app users and guests (if you're a RingCentral app admin)
- Connect your personal contacts from Outlook, Google, and your mobile device
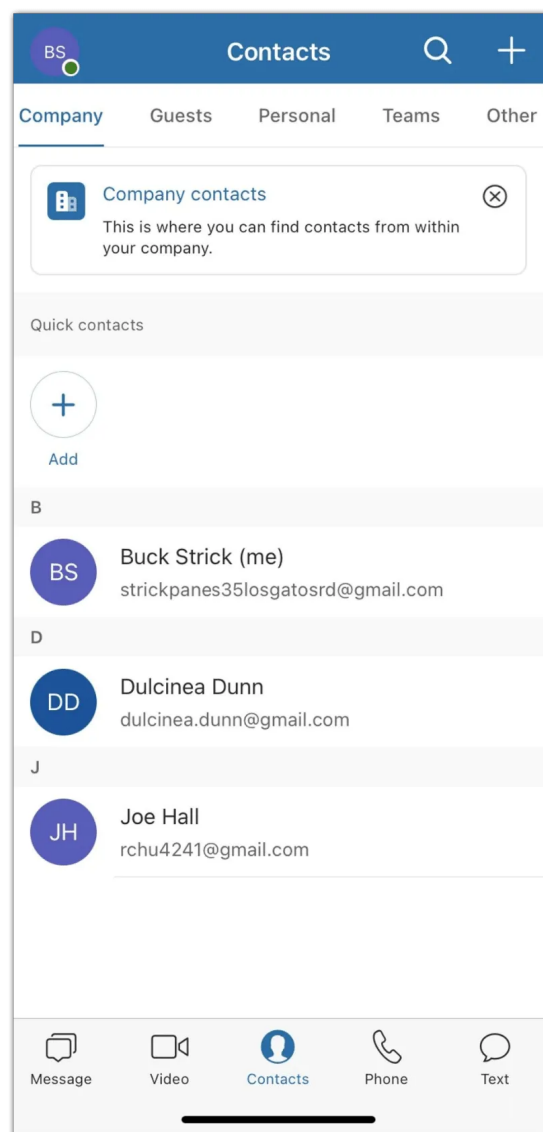
Messaging notification apps

With [integrations](#), you can:

- Shorten sales cycles with popular CRM integrations
- Enhance the delivery of customer support
- Boost user efficiency with cloud file-sharing services

To learn more about what you can do under Apps, visit [Intro to RingCentral app integrations](#).

Getting started

Downloading and installing the RingCentral app

Downloading and installing the app for Windows

1. Navigate to the [RingCentral downloads page](#).
2. In the **RingCentral App** row, select the download link for Windows.
3. Allow the download to finish and then select the downloaded file to **Run** the installation file.

Once the installation has completed, you will see the RingCentral app's icon on your taskbar.

Checking the chip on your Mac computer

Before downloading the RingCentral app on your Mac computer, check first which chip it has.

1. At the top left, click the Apple menu.
2. Select **About This Mac**.
3. In the **Overview** tab, look for **Processor** or **Chip**.
4. Check if it says **Intel** or **Apple**.

Depending on the chip your Mac has, follow the steps below on downloading and installing the RingCentral desktop app.
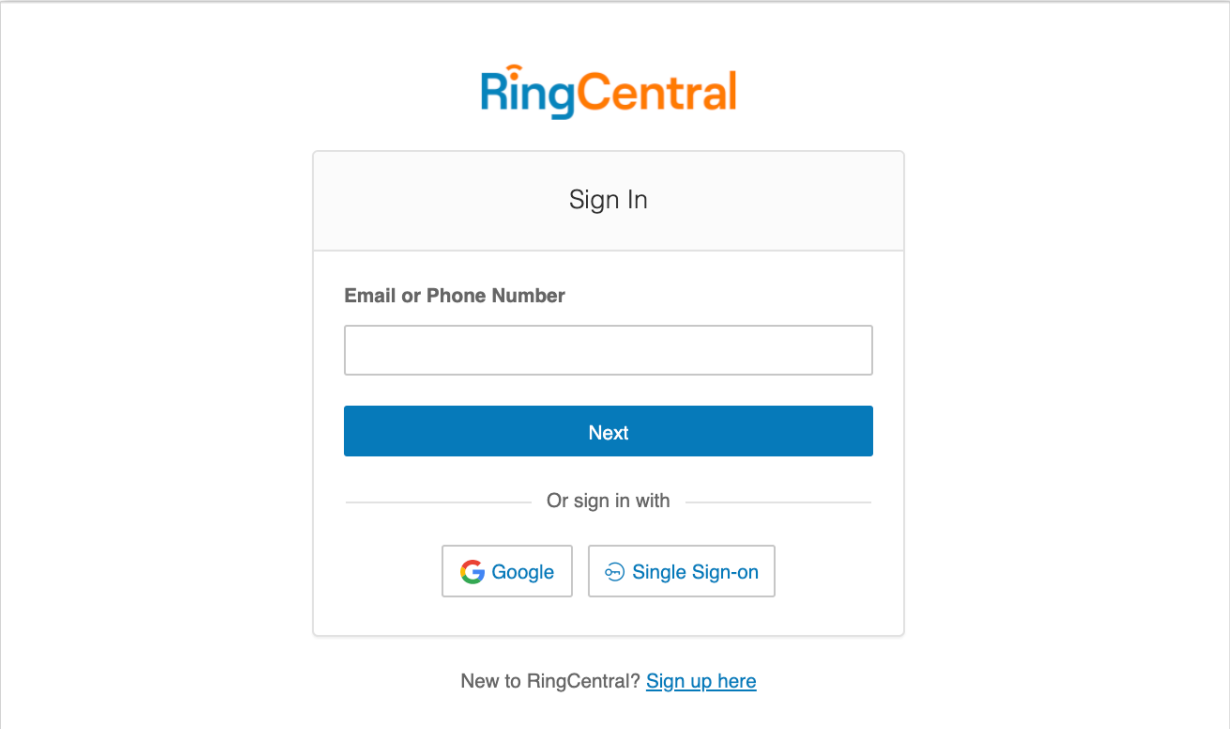
Downloading and installing the app for Mac with Intel Processors

1. Navigate to the RingCentral downloads page.
2. In the **RingCentral App** row, select the download link for **Mac with Intel Processors**.

3. Open the installer package after the download completes.
4. For users, select **Install for me only**. For admins, select **Install for all users of this computer** and then click **Continue.**
5. Select **Install**.
6. Verify that the application is in the Applications folder.

Downloading and installing the app for Mac with Apple Silicon Processors

1. Navigate to the RingCentral downloads page.
2. In the **RingCentral app** row, select the download link for Mac with **Apple Silicon Processors**.
3. Open the installer package.
4. For users, select **Install for me only**.
5. For admins, select **Install for all users of this computer** and then click **Continue**.
6. Select **Install**.
7. Verify that the application has been placed in the Applications folder.

RingCentral

Sign In

Email or Phone Number

Next

Or sign in with

G Google   ↩ Single Sign-on

New to RingCentral? Sign up here

Logging in to the RingCentral app desktop and web

1. Launch the RingCentral app on your computer
   OR
   Navigate to app.ringcentral.com.

2. Click the **Sign in** button.
3. Select your preferred sign-in method from the login page:
    a. RingCentral sign-in form
    b. Google
    c. or Single Sign-on

Logging in using your preferred login method
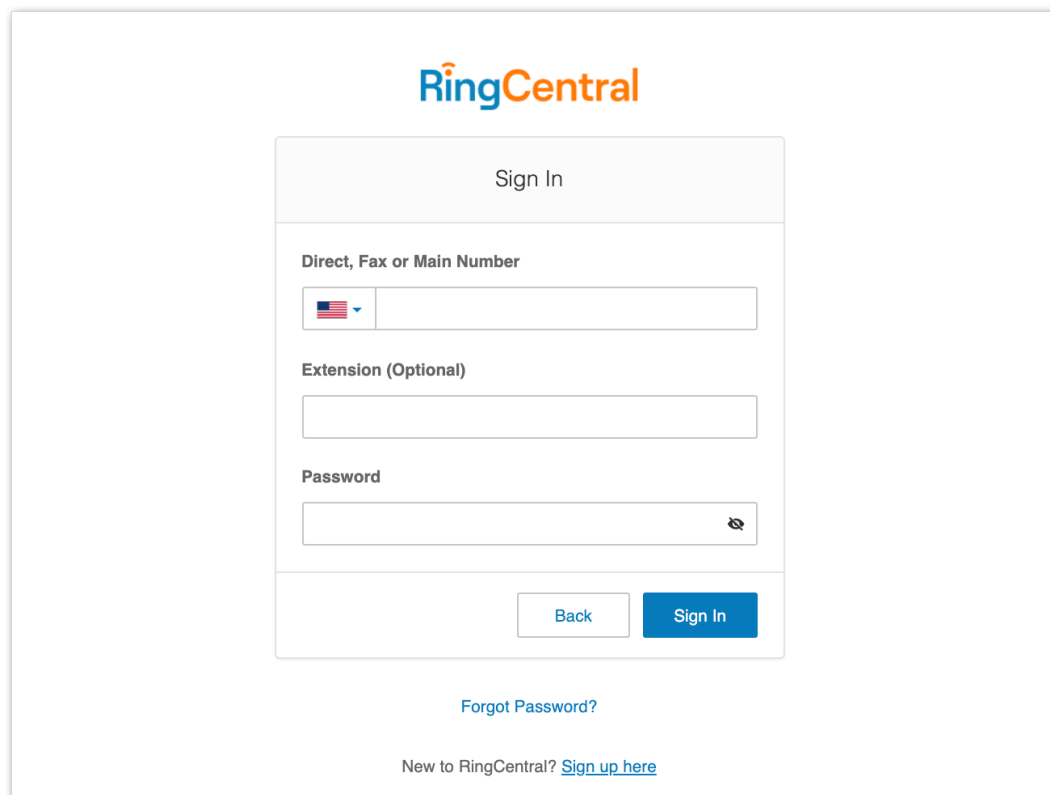
Your login options include:

- RingCentral login form: Use this login method to sign in using your RingCentral credentials.
- Google: Use this login method to sign in using your Google account credentials.
- Single Sign-on: If Single Sign-on is enabled on your account, use this login method to sign in using your Single Sign-on credentials.

Logging in using the RingCentral sign-in form

1. Enter your RingCentral email or phone number.
2. Select the **Next** button.
3. If you logged in using your phone number, enter your extension number in the **Extension (optional)** field.
   Note: You may need to specify your extension if you share the same phone number in your account to avoid logging in as a different user.

4. Enter your password.
5. Click **Sign in**.

Logging in using your Google account

If you have logged in before using your Google account credentials, select your Google account from the login page to log in automatically.

If this is your first time logging in:

1. Enter your Google email address or phone number.
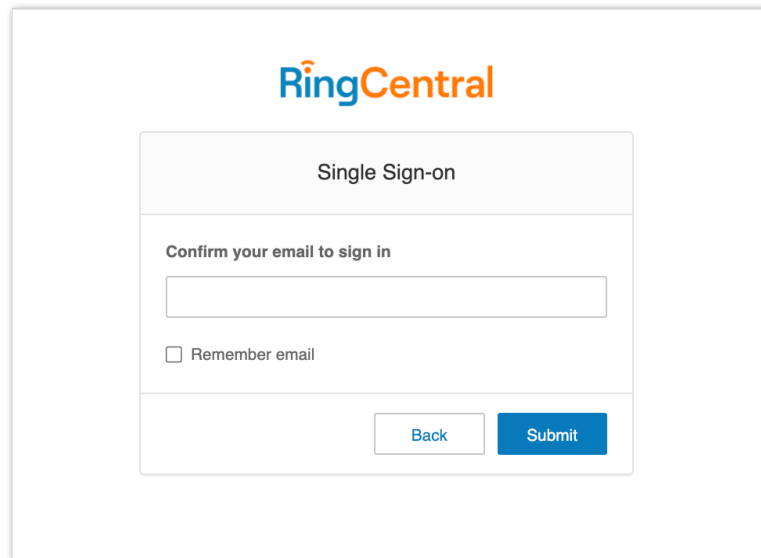
2. Click the **Next** button.
3. Enter your password.
4. Click **Next** to navigate to a page requesting access to your Google account.
5. Click **Allow** to sign in.

Note: If your Google account has been provisioned with Google G Suite, you may be redirected to the Google G Suite login page. Enter your login credentials, and then click **Sign In**. Visit **Enable Google Cloud Directory in the RingCentral Online Account** to learn more.

Logging in using Single Sign-on

1. Click the **Single Sign-on** button.

2. Enter your email to confirm your identity.
3. Click **Submit** to redirect to the RingCentral Single Sign-on page.
4. Enter your **Username** and **Password**.
5. Click **Sign in**.

In-app activation

After you sign up for a RingCentral MVP account, you will receive an email that contains an activation link. Navigating to this link will prompt you to set up your account using the Express Setup. The Express Setup will assist you with setting up your company details and phone system.

Once you are finished setting up your account via Express Setup, one of the following things will happen:

● The RingCentral app will launch if you have it installed on your computer. Confirm that you'd like to open the desktop app.
● You will be prompted to download the RingCentral app, or you can choose to continue to the web version of the RingCentral app.

Your RingCentral MVP account activation will finish in the RingCentral app, and you can choose how to log in.

Navigating the RingCentral app for web and desktop

The RingCentral app for desktop and web is divided into several sections: the top header bar, the side menu bar, the left pane, and the center pane.

Some of the information in each section may change depending on which part of the app you are in, but the left navigation bar and the top header bar sections stay the same no matter where you are.

Left-hand navigation bar

Depending on your permissions, you can navigate between the following features in the left-hand navigation bar:

- <u>Message</u>**:** Send and receive messages, create and collaborate in teams, share files, and create tasks.
- <u>Video</u>**:** Start, schedule, and join meetings, manage recordings, and view upcoming meetings.
- <u>Phone</u>**:** Make and receive phone calls, send and receive text messages, manage your call history, and listen to your voicemails.
- <u>Contacts</u>**:** Add, view, and manage RingCentral app users, including administrators, co-workers, and guest users. You can also create, view, and manage teams. Note: You can connect your <u>Google personal contacts</u> and connect your Office 365 account <u>here</u>.
- <u>Tasks and more</u>: Add, view, and manage your tasks, events, files, and notes
- <u>Analytics</u>**:** Only available as an administrator; select the bar graph icon to navigate to the RingCentral MVP analytics portal.
- <u>Apps</u>: Integrate third-party apps from the RingCentral App Gallery to receive custom notifications and alerts.
- <u>Settings</u>**:** Configure your RingCentral app settings, including settings for notification and sounds, Message, Video, and Phone. You can also sync your calendar and view the app's available keyboard shortcuts.
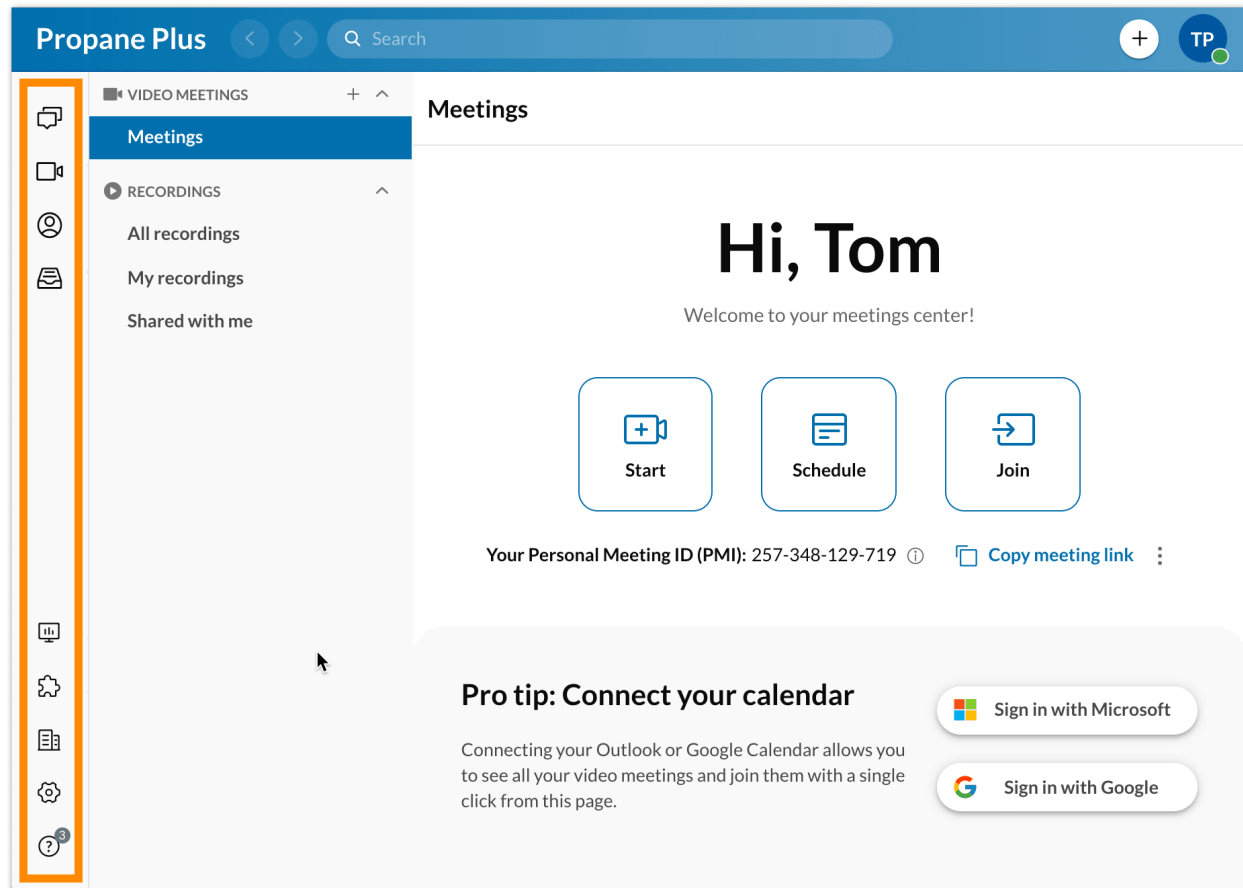
Top header bar

The top header is always available at the top of the app and contains (from left to right):

- Your company name

- Back and forward arrows to navigate to the page you visited previously

- A search bar to search for messages, users, groups, and teams in your company

- A dial pad to call colleagues or external numbers. Note: You must have telephony enabled on your account for this feature.

- **New actions** button to perform quick actions (depending on your permissions):
    - Send a new message: Send a new message to someone.
    - Create a team: Create a new team.
    - Start a video call: Start a RingCentral video meeting. You can add participants once in the meeting.
    - Schedule a video meeting: This opens a window for you to schedule a new meeting.
    - Send new text: Send a new text message.
    - Send new fax: Send a new fax.

- Invite to RingCentral: Hover over this setting to reveal a set of options for inviting new users to the RingCentral app. Options include By email, By text, and By sharing a link:
- Your profile menu. Click this to reveal the following option:
  - Profile: Select View profile to open your profile and make changes to your information and profile picture
  - Status: Select Share status to create a status to share with others and Clear status to clear your existing status
  - Presence: Set your RingCentral app presence by hovering over your current status and selecting from a list of options from a dropdown menu. Options include Available, Do not disturb, and Invisible
  - What's new: Opens the release notes from the RingCentral support site. This shows the new features of the RingCentral app
  - Accept queue calls: Available to admins and users that are part of a call queue, click the Accept queue calls toggle to enable or disable this option
  - About: Select the About button to learn more about which version of the app you're running and the RingCentral app security, privacy notice, terms of service, and acceptable use policy
  - Manage account: Only available to admins; this opens the RingCentral online account, so you can manage your settings
  - Help & Support: Click the Help & Support option to report an issue, share an idea, or access support content
  - Sign out: Select Sign out to log out of the RingCentral app
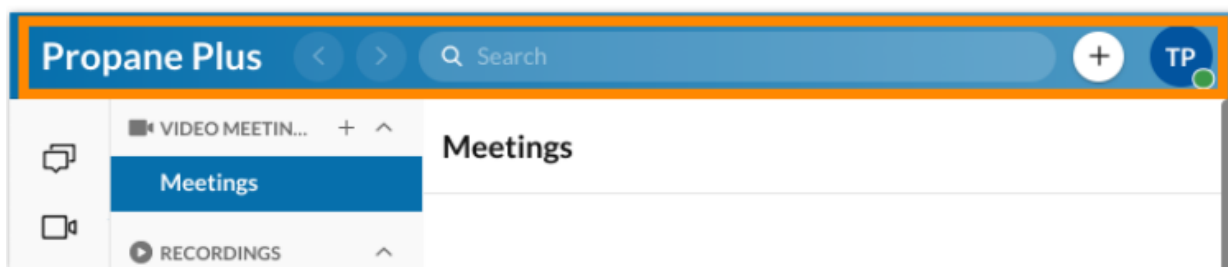
Left pane

No matter where you are in the app, you'll find a left pane that allows you to navigate through the main parts of a particular menu option. However, the contents of this pane will differ depending on which menu option you're using.

For example, in Message, this left pane contains a list of all direct messages, groups, and teams you have open.

Quick creation

An important feature of the left pane is the quick creation plus button. Clicking this button will create an item associated with that section.
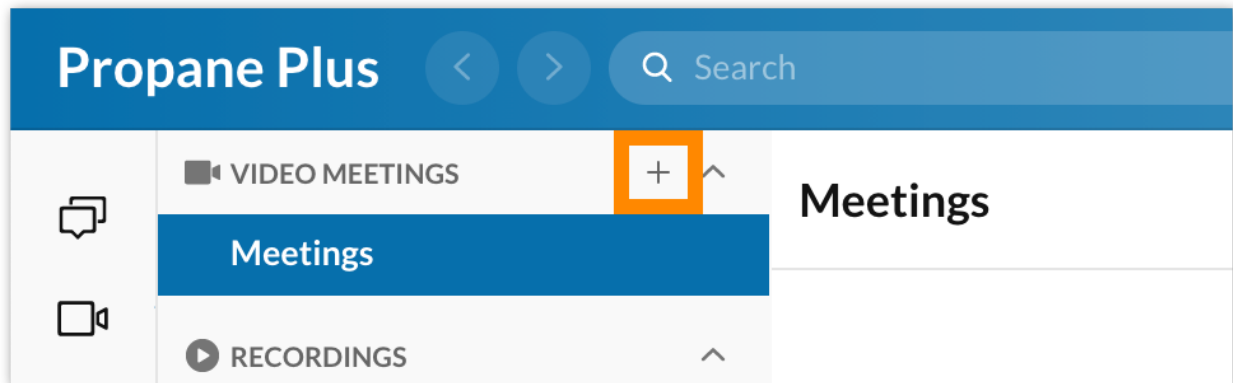
Center pane

Finally, each page in the app has a center pane, where you will spend most of your time interacting within the app. The center pane will differ depending on where you are within the app.

For example, in Message, the center pane is your message thread containing the history of a particular conversation. In Video, if you're on the Meetings page, this page will contain a list of scheduled meetings for the day as well as action buttons to start, schedule, or join a meeting.

Navigating the Contacts menu

You can view and manage all your company's RingCentral app users and any teams you have created via the **Contacts** menu, including all co-workers, guest users, and admins.

Note: Guest users can only view RingCentral app users that they are in conversations with. If they're not in a direct message, group, or team chat with a user, then they will not see that user in the **Contacts** menu.

You can access the **Contacts** menu by clicking the person icon via the left-hand navigation bar.
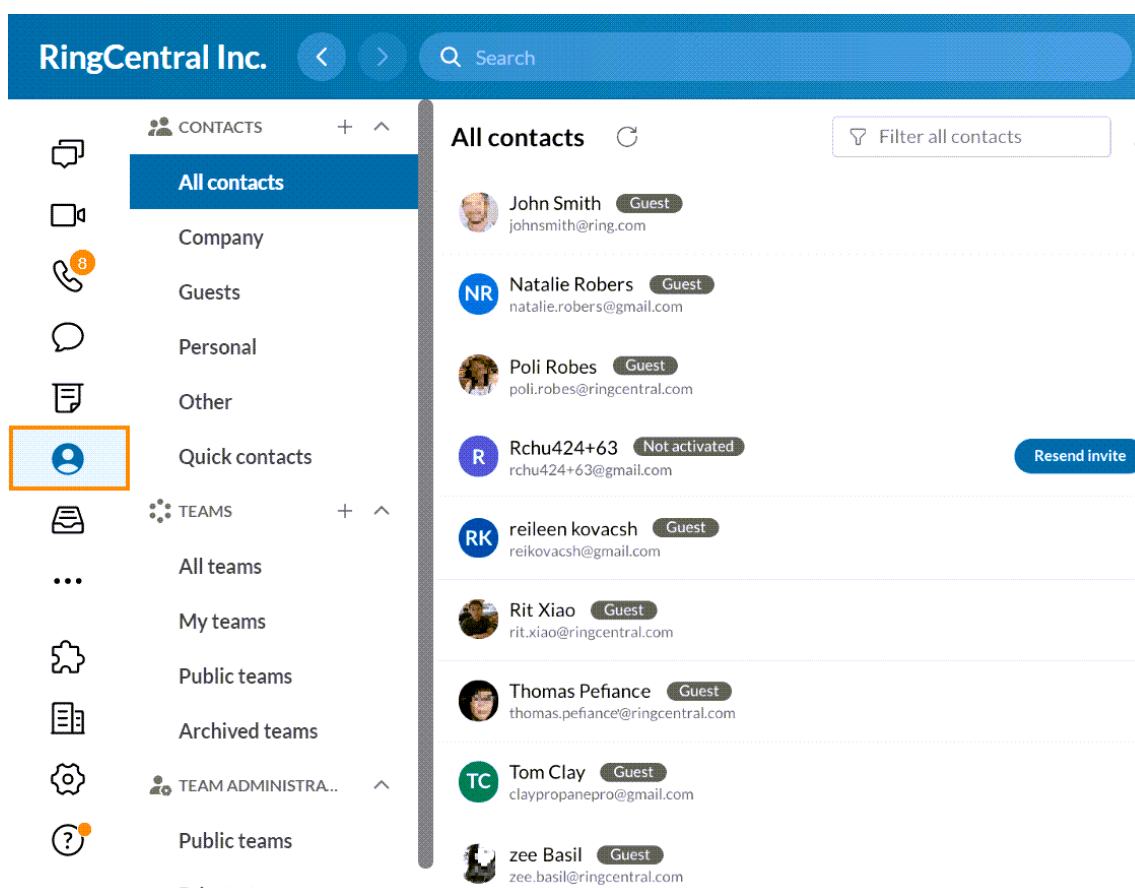
Left pane

In the **Contacts** menu, the left pane contains the main navigation tabs that will take you to the major pages under **Contacts**. This pane is divided into two collapsible sections: **Contacts** and **Teams**.

Contacts

The **Contacts** section in the left pane contains the following tabs:

- **All contacts**: A full list of your RingCentral account contacts
- **Company**: Contacts whose email addresses are on your company's private domain
- **Guests**: Users who do not work at your company but have been invited to collaborate in a team conversation
- **Personal**: Your personal contacts, including contacts you have added in the RingCentral app and contacts you have synced from your Microsoft and Google accounts
- **Other**: Contains a list of group extensions on your account, including call queues, announcement-only extensions, message-only extensions, and shared lines.
- **Quick contacts**: Allows you to manage your frequent contacts.
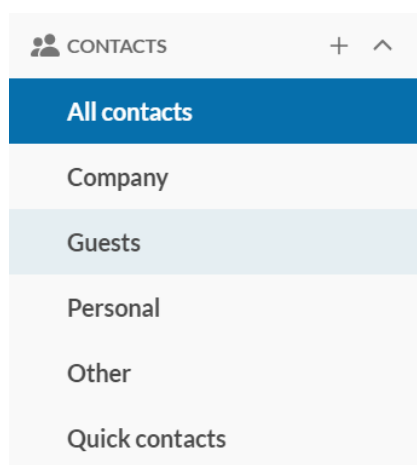
Quick contacts

With the Quick contacts feature, you have a dedicated place to easily access your most frequent contacts. By adding people to your quick contacts list, you don't have to search for them whenever you need to contact them.
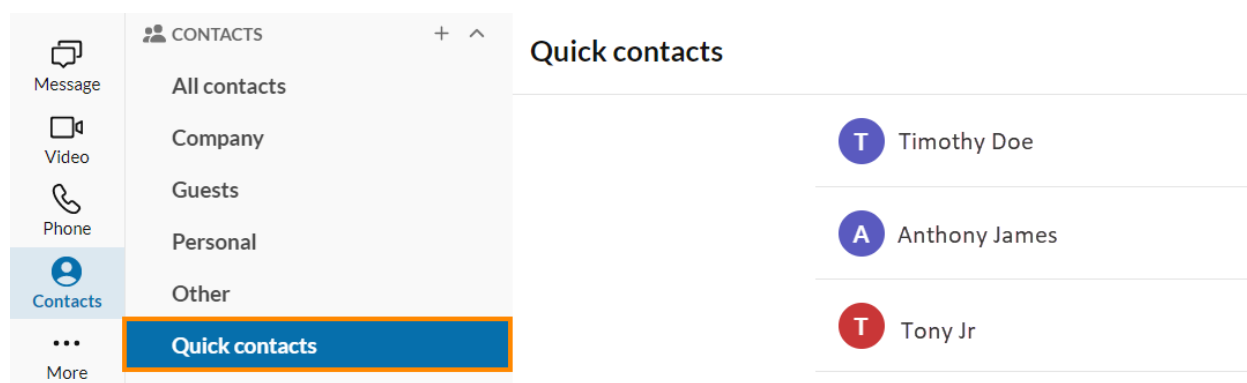
After adding people to your Quick contacts list, you can access their profiles from the top of the **All contacts** tab. You have access to the first 10 quick contacts, and if you want to access more, you can click **Manage**.
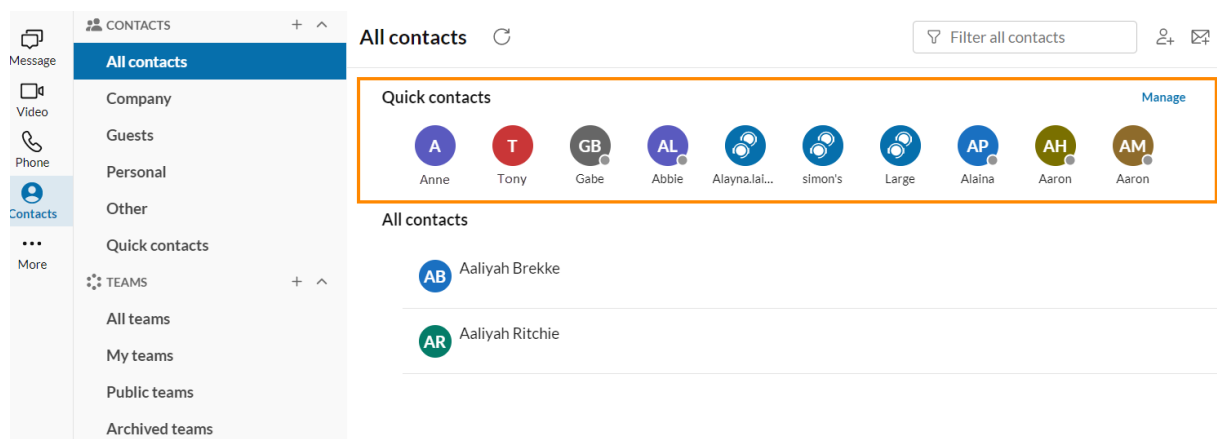
To learn more about what you can do under Contacts, visit Intro to users in the RingCentral app.

Teams

In the **Contacts** menu, you can locate your teams via the **Teams** section in the left pane. This section contains the following tabs:

- **All teams**: All teams that have been created in your company's account, with the exception of private teams of which you're not a member
- **My teams**: Teams that you have either created or joined
- **Public teams**: Teams that are public — that is, teams that you can join without an invite
- **Archived teams**: Teams you were a part of that have been archived by an admin of the team. If you're an admin of an archived team, you may reactivate it by clicking **Restore** at the far right
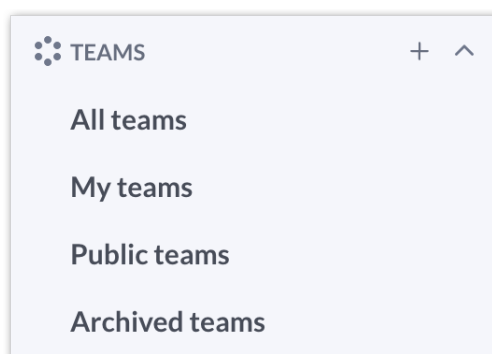
Team Administration

Team Administration gives super admins the ability to view all private and public teams in the Contacts tab. This section in the left pane contains the following tabs:

- **Public teams**: View of all your company's public teams, where users can join without an invite.
- **Private teams**: View of all your company's private teams, where users are added or invited to the team.
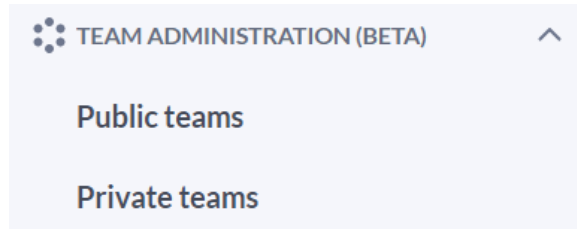
Using keyboard shortcuts

The RingCentral app has keyboard shortcuts to simplify navigation within the app, whether that's returning to a previous conversation or making changes to a message. Keyboard shortcuts allow users to more easily navigate our desktop and web apps by pairing commonly used actions with various key combinations.

Accessing keyboard shortcuts

Click **Settings** at the bottom left of the left-hand navigation bar, and then select the **Keyboard shortcuts** tab in the left pane.

See this article for the list of shortcuts that will appear on the keyboard shortcuts settings page.

Using the Resource Center

The Resource Center is a single location for users to:

- Take a quick tour of how to get started.
- Access quick tips and step-by-step guides.
- Access app information and submit feedback.
- Watch how-to-videos.
- Discover recommended features and what's new.
- Search for help topics.

Note: You will see an orange alert bubble in the Resource Center icon if there is new content or added feature that you may want to view.
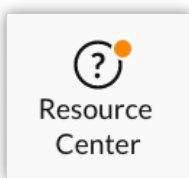
Accessing the Resource Center

1. Navigate to the left-hand navigation bar.
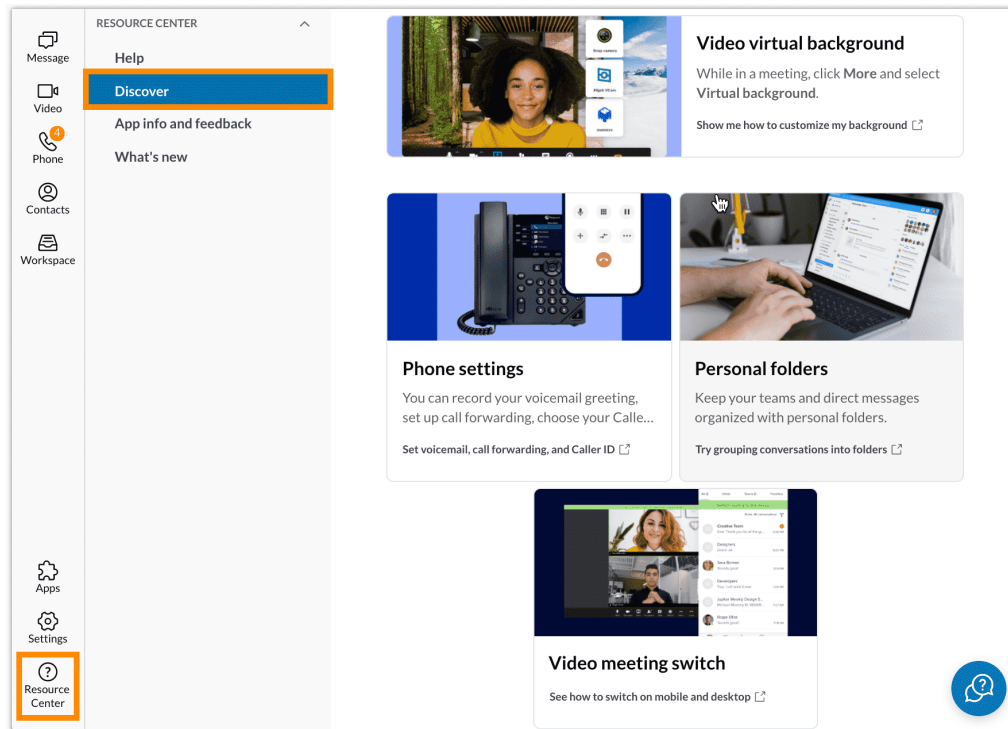
2. Click **Resource Center**.

3. Navigate between the Resource Center features.

Resource Center features

-   Discover: Discover new features and watch how-to videos. Please note that some videos might not be available depending on your language and region.
-   Help: Get help by using any of the following:
    -   Search topics and questions: Type questions or topics directly in the search bar.
    -   Popular topics: Click one of the topics to access related information.
    -   Filter by: Filter related topics for in-app tours using one of the following: *All*, *Message*, *Video*, or *Phone & SMS*.

Need help?

Visit our support page to find answers to your questions.

Go to support

Join our community

Get help and support from our friendly community about yo...

Join now

RingCentral blog

Read about company news, customer stories, and trends.

Visit blog

In-app tours

Check out our quick step-by-step guides in the app

Filter by

All	
Message	
Video	
Phone & SMS	

View phone and voicemail settings

Welcome guide

Schedule meetings from message t...

Create teams

Connect calendars

Customize Personal Meeting ID

View recordings

Send text messages

Send faxes

Add contacts

Search for contacts

Update themes

Start calls with dial pad

Create tasks and events

Take quick actions

Invite colleagues

Set Caller ID

Join meetings from video tab

Start meetings from video tab

Schedule meetings from video tab

Start meetings from message tab

Send direct messages

- App info and feedback: View app version, security and privacy notice, terms of service and acceptable use policy.
- What's New: Discover what's new in the RingCentral app.

Adding or managing users

If you're an admin on your company account or a user given the proper permissions, you can add an unlimited number of users to the RingCentral app at any time. There are three types of users:

- Admins
- Co-workers
- Guest users

Note: Only other admins can add admins in the RingCentral app.

If you can't invite a new user, this permission could be disabled for you. Reach out to your company admin to request access to this feature.

Admin users are added via the **Administration** page; if you'd like to learn more, visit Manage Admin Users in RingCentral App. Note: Only other admins can add admins in the RingCentral app.

There are multiple ways that you can add a new user to your company account, including:
- By selecting Invite to RingCentral when you click on the New actions plus button at top right and selecting one of the following options:
    - By email
    - By text
    - By sharing a link
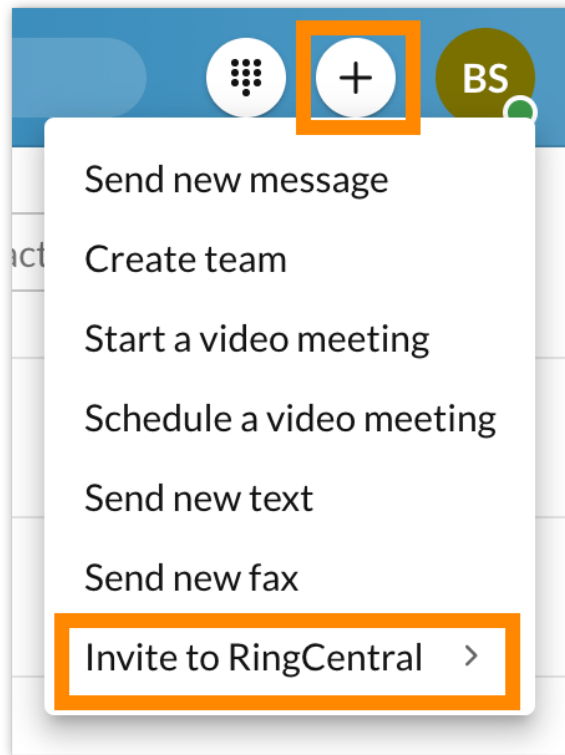
- By selecting the Create new contact person icon via the Contacts menu in the left-hand navigation bar
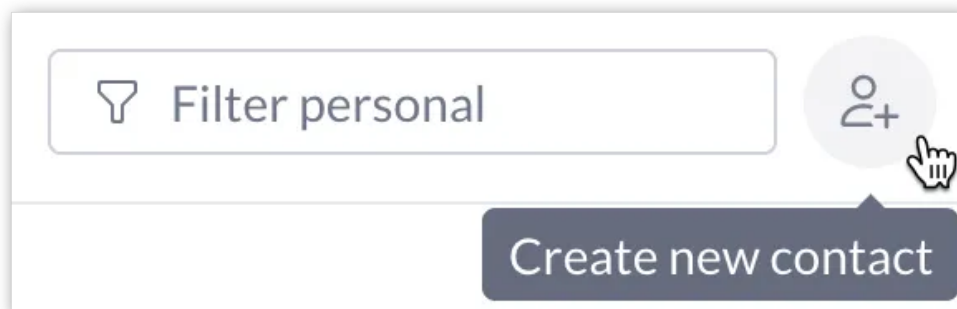
- By sending a new message to a person outside of the RingCentral app

New message

Members

johnsmith@ringcentral.com ⊗

Enter names or email addresses separated by semicolons or commas.

Type new message

Conversations with one or more specific people are great for informal chat. For projects, departments, or even topic-based discussion, you should create a team instead.

Cancel   **Send**

- By inviting a person outside of the RingCentral app to a team or group

Add team members

Members

johnsmith@ringcentral.com ⊗ |

Enter names or email addresses separated by semicolons or commas.

Cancel   **Add**

Inviting new users

1. Select the New actions plus button at top right.
2. Hover over the Invite to RingCentral option to reveal a dropdown menu of invitation options.
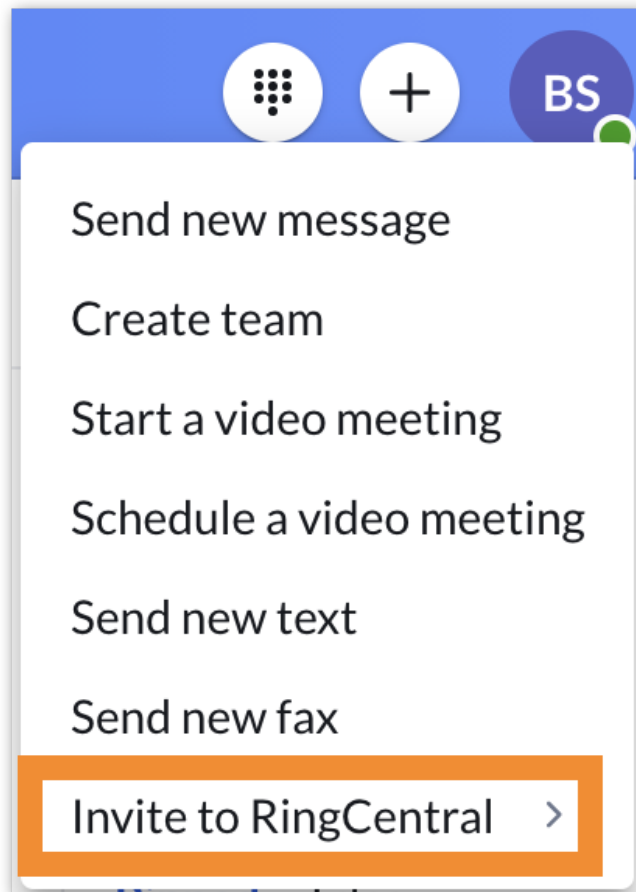
3. From the dropdown menu, choose either By email, By text, or By sharing a link.
4. Configure the appropriate settings based on the option you selected in step 3.

When you choose one of the options under the Invite to RingCentral option, additional actions are required to invite a user successfully.

Inviting new users by email

1. Enter a semicolon- or comma-separated list of email addresses (max. is 20 emails).
2. Select Invite to send an email invitation to each email address.

Invite by email

Email

jsmith@locksmiths.com ⊗

Enter up to 20 emails separated by semicolons or commas.

Cancel   **Invite**

Inviting new users by text

1. Provide a phone number in the To field and press Enter or Return on your keyboard.
2. Select Next.
3. In the message field at the bottom of the app, provide an invite message (optional).
4. Press Enter or Return on your keyboard to send the message.

Invite by text

Text from

(409) 200-2234   ▼

To *

Enter name or phone number

📎   ☺

Buck Strick invites you to create a free RingCentral Glip account with unlimited video
meetings and messaging: https://glip.com/invite/7b4e4c7f3fpwgeb

Cancel   Next

5. Invite by text in RC app

Note: The option to invite by text message is only available if your company has text messaging enabled at the account level. Additionally, only admins with a direct number can send text messages and invite new users by text.

Inviting new users by sharing a link

1. Share the link in one of two ways

a. Click the Share invite link via the email button.
   i. Enter a list of email addresses you'd like to send the invitation line to via the default email app that opens
   ii. Send the email
b. Select the Copy paper icon to copy the link
   i. Send the link to any person you'd like to invite

Invite link

https://glip.com/invite/abea640f3fpwgeb ⬚

Share invite link via email   Done

Managing guests

Guests are users who do not work at your company but have been invited to collaborate in your RingCentral app company account. These users can also include those whose email addresses do not share your company's private domain.

If you're an admin on your RingCentral account, you can block unwanted guests from the Contacts page and the guest profile. This security feature will prevent guests from communicating with your users.

For more info about allowing or blocking domain and webmail accounts, go to Managing your domain allow/block list in the RingCentral app desktop and web.

Blocking guests from the Contacts page

1. Go to **Contacts** from the left navigation bar.
2. Click **Guests** on the left pane.
3. Search for the guest that you'd like to block or browse through the list of your guest contacts.
4. Hover over the guest user and click on the **Block** trash can icon at far right. Note that you may have to click the **More** icon before clicking **Block**.

D0 Dave20 02Brown (Guest)
dave2002brown@gmail.com

---
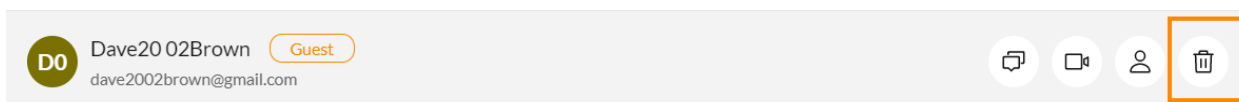
5. Click **Block**.

Blocking guests from profile

1. Click on the profile photo of the guest anywhere you see it within your RingCentral account, then click **Profile**.
2. Click the **More** icon on the upper right, then click **Block**.
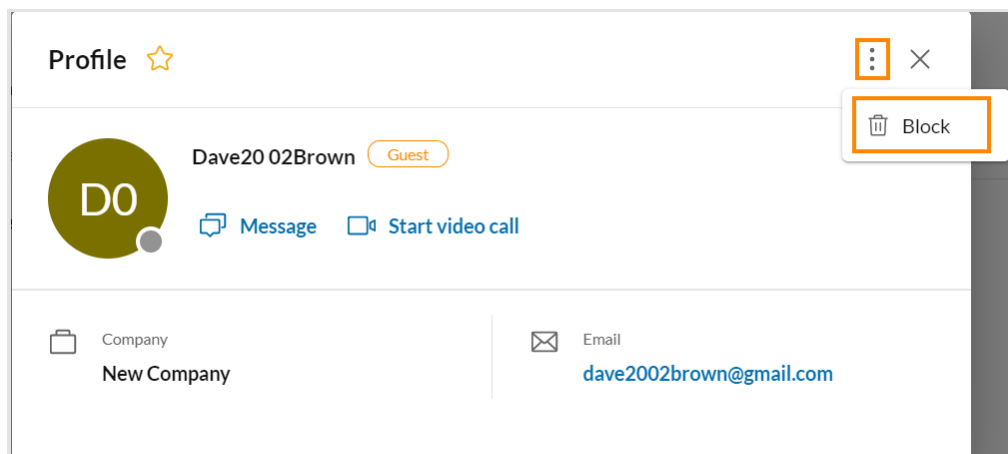
3. Click **Block**.

Using RingCentral Message

Sending a message

One way you can send a message is via the **New actions** plus button. When you send a message via this option, you can easily start a new chat with one individual or a group of people.

1. Click the **New actions** button at the top right to reveal a dropdown menu.
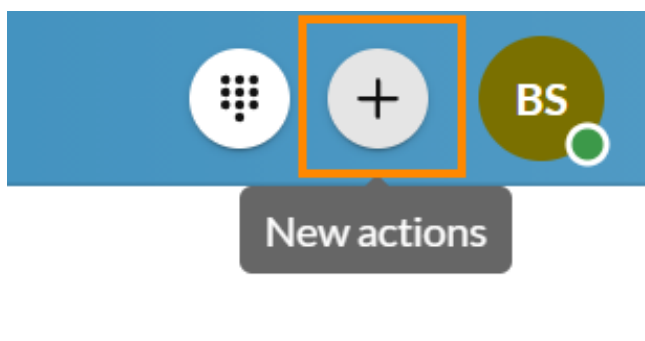
2. Select *Send new message.*

3. Enter a list of names or email addresses in the **Members** field and separate each name or email with a comma or semicolon.
4. Type the body of your message in the **Type new message** field.
5. Click **Send.**

Once you've sent a new message, that conversation will appear at the top of your conversations list.

This is just one way you can send a message, but keep in mind there are several other methods you can use to send a message. To learn more, visit Send a Message in RingCentral App for Desktop or Web.

Attaching a file in a message

You can attach files to a message at any time, and these files can come from your computer, Google Drive, or cloud storage like OneDrive/SharePoint and Dropbox. You can attach any type of file, including documents, images, or videos as long as it's under 1 GB.

The processes for attaching a file from your computer, Google Drive, OneDrive/SharePoint, or Dropbox are a little different, so let's review each of these methods separately.

Note: Admins need to enable file sharing for the file source to appear on users' accounts. For more information, visit Managing file sharing in the RingCentral app desktop and web.

Attaching a file from your computer

If you'd like to attach a file from your computer without including a message, you can simply drag a file from your computer into the message field at the bottom of the app. However, if you'd like to include a message along with your attachment(s), follow these steps to attach a file:

1. Navigate to **Message** via the left-hand navigation bar, and select a conversation.
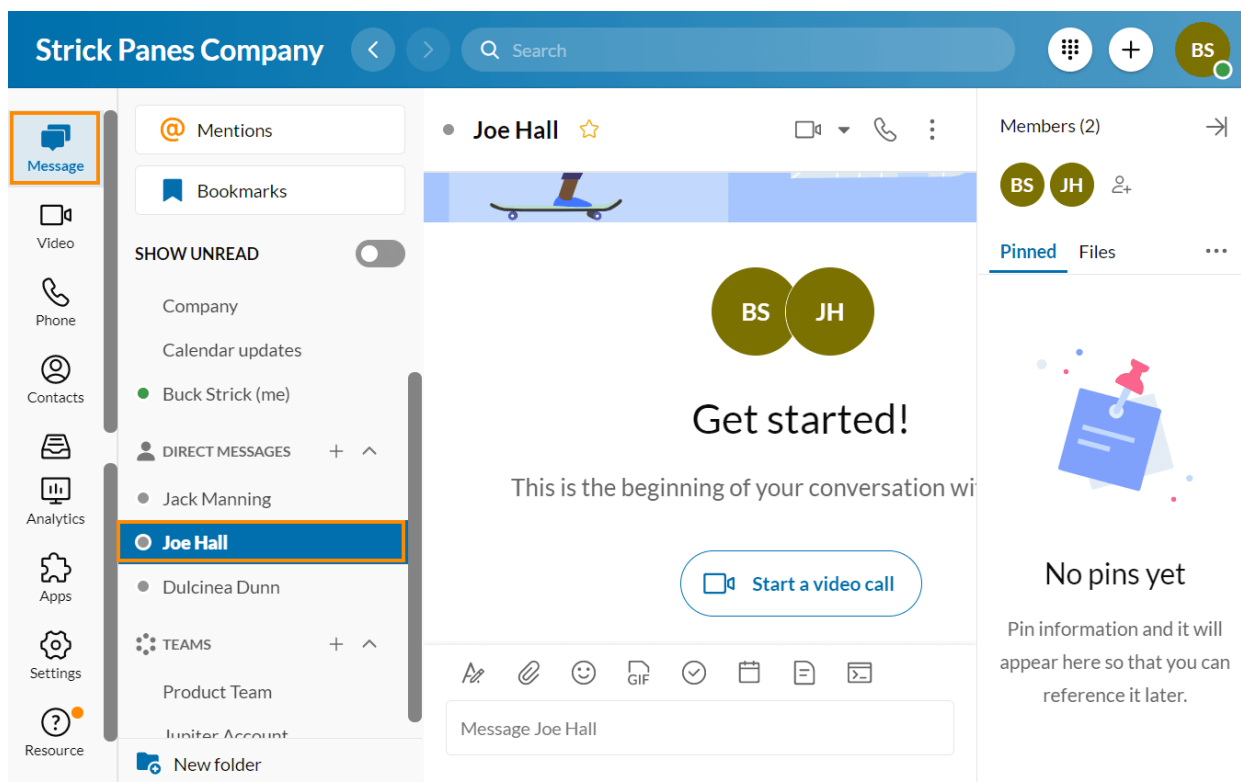
2. Draft your message in the message field.
3. Click the **Attach file** paperclip icon above the message field, then select *Computer*.
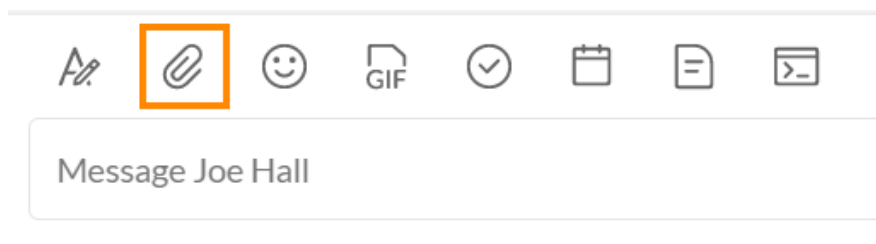
4. Locate and select the files you want to add, then click Open to attach to the message.
5. Once you're ready to send, press Enter on your keyboard or click the Send icon to send your message.

Attaching a file from Google Drive

1. Navigate to **Message** via the left-hand navigation bar and select a conversation from the conversation list.
2. Draft your message in the message field (optional).
3. Click the **Attach file** paperclip icon above the message field, then select Google Drive.
4. A window will appear, informing you that you must give RingCentral permission to access your files and remind you to enable pop-ups in your browser. Click **OK** to continue.

Import files from Google drive

You must allow RingCentral to have access to your files and make sure popups are enabled in the browser.

OK

5. Choose the Google account from which you'd like to import your files.
6. Log in to your Google account.
7. If this is your first time importing files from Google Drive, you will be prompted to give RingCentral permission to access your Google account. Click **Allow** to continue.
8. Locate and click on the file(s) from your Google Drive you'd like to attach to the message.

Select a file ✕

Google Drive   Shared drives

Google Drive ▸ **Message**

Files

RC-RCapp-mes...
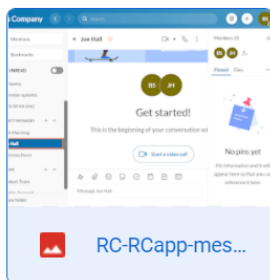
Select   Cancel

9. Click **Select** to attach the file(s).
10. Once you're ready to send your message, press **Enter** on your keyboard or click the **Send** icon.

Attaching files from OneDrive/SharePoint

1. Navigate to **Message** via the left-hand navigation bar and select a conversation from the conversation list.
2. Draft your message in the message field (optional).
3. Click the **Attach file** paperclip icon above the message field, and select OneDrive/SharePoint.
4. A window will appear, informing you that you must give RingCentral permission to access your files and remind you to enable pop-ups in your browser. Click **OK** to continue.

Import files from OneDrive/SharePoint

You must allow RingCentral to have access to your files and make sure pop-ups are enabled in the browser.

OK

5. Log in to your Microsoft account that you created for OneDrive/SharePoint.
6. If this is your first time importing files from OneDrive/SharePoint, you will be prompted to give RingCentral permission to access your Microsoft account. Click **Yes** to continue.
7. Locate, select, and open the file(s) from your cloud storage to attach to the message.

8. Click **Open** to attach the file(s).
9. Once you're ready to send your message, press **Enter** on your keyboard or click the **Send** icon.

Attaching a file from Dropbox

1. Navigate to **Messages** via the left-hand navigation bar and open a conversation.
2. Draft your message in the message field (optional).
3. Click the Attach file paperclip icon above the message field, and select Dropbox.

4. A window will appear, informing you that you must give RingCentral permission to access your files and remind you to enable pop-ups in your browser. Click **OK** to continue.

5. Sign in to your Dropbox account using Google, Apple, or your email address.
6. Locate and click the file(s) from Dropbox that you want to attach to the message.

7. Click **Choose** to attach the file(s).
8. Once you're ready to send your message, press **Enter** on your keyboard or click the **Send** icon.
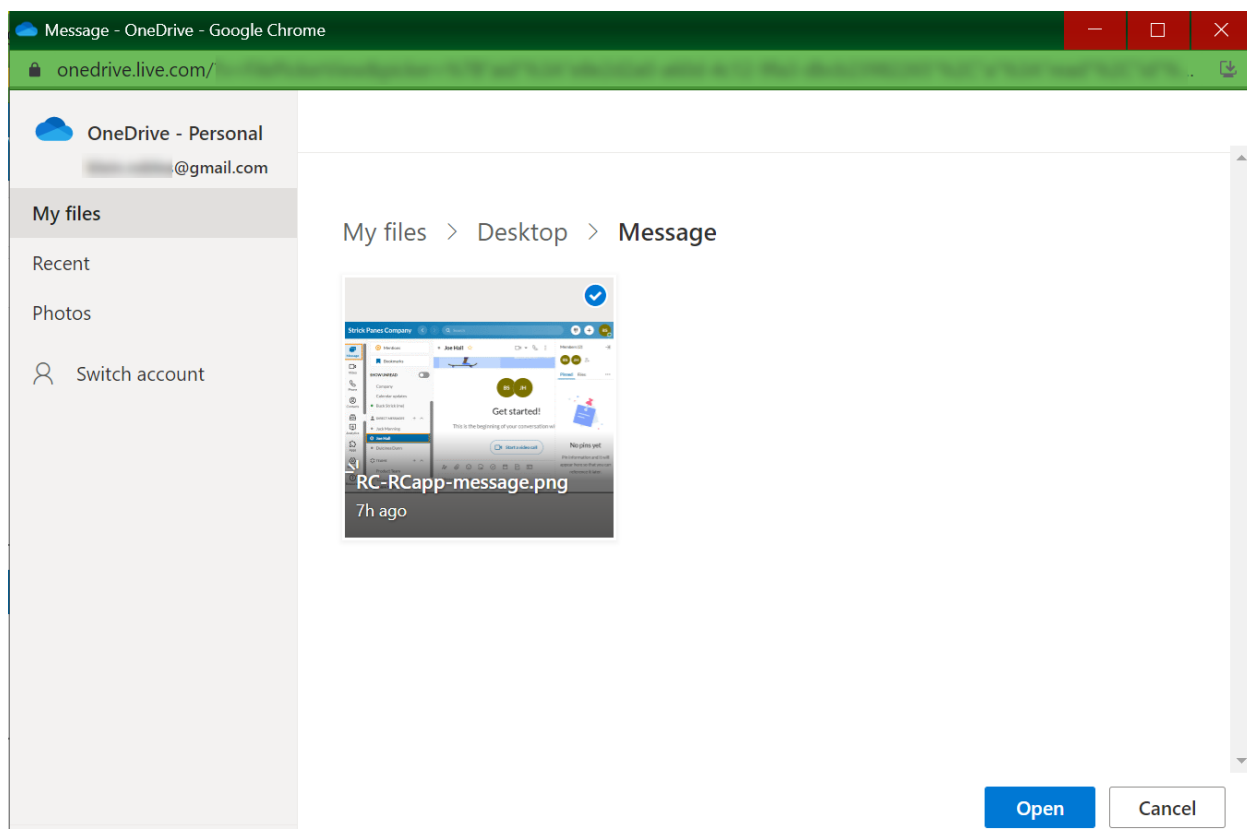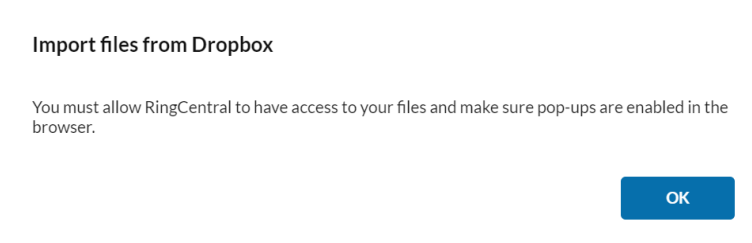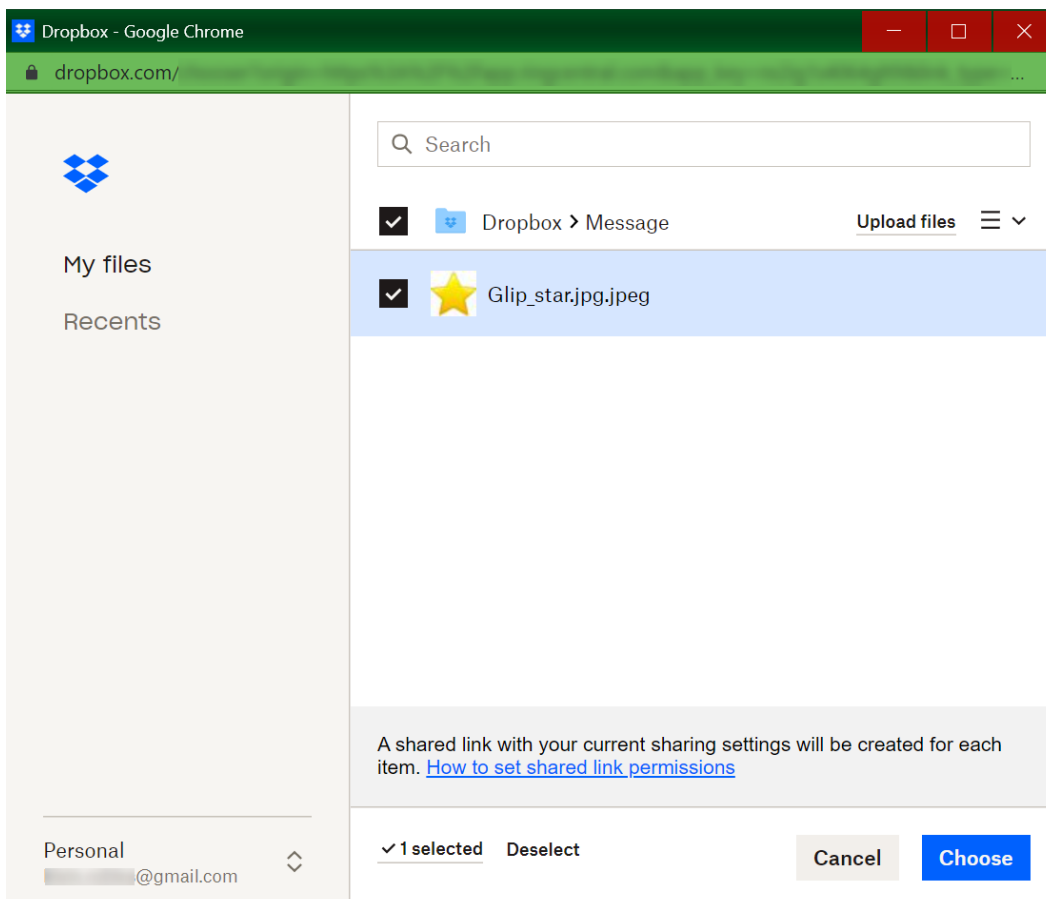
Attaching a file from Box

1. Navigate to **Messages** via the left-hand navigation bar and open a conversation.
2. Draft your message in the message field (optional).
3. Click the **Attach file** paperclip icon above the message field, and select *Box*.
4. You will be redirected to sign in to your Box account. Options include signing in with SSO or using your email address.
5. Locate and click the file(s) from Box that you want to attach to the message.
6. Click the check icon to attach the file(s).
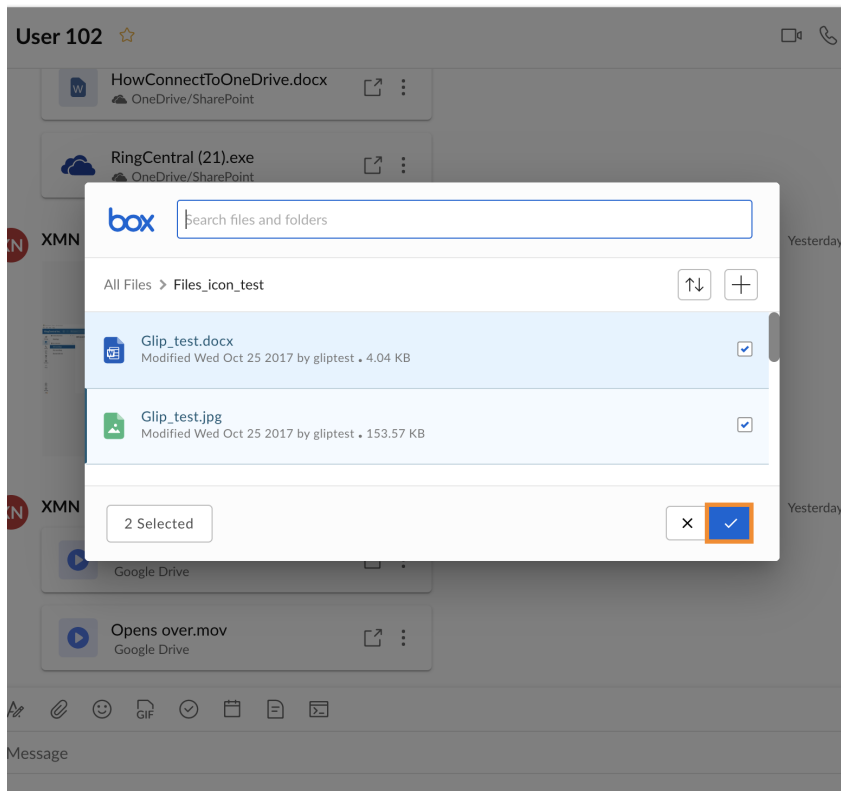
7. Press **Enter** or **Return** or click the **Send** icon.

While attachments from Google Drive, OneDrive/SharePoint, Dropbox, and Box will appear as a thumbnail, you have the option to view that file in your browser. Click the View in browser icon to view the file.
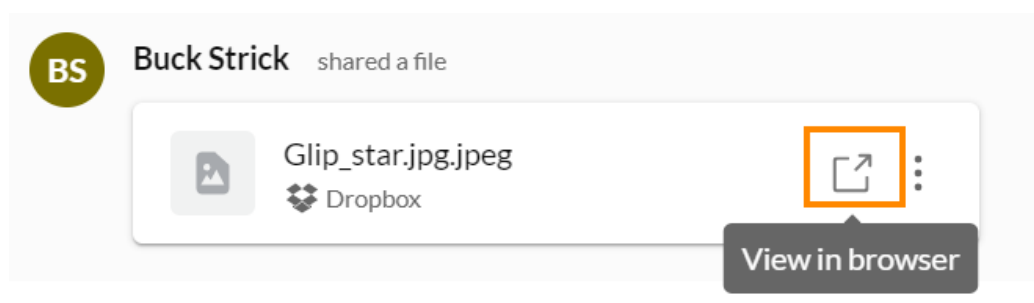
Forwarding a message to another conversation

As a user, you can share messages and attachments from one conversation to another. The forwarded message contains the original poster's name, the team name (if applicable), a quote of the original message, and any included attachments.

If the post was forwarded from a group conversation, the group conversation's name will not be displayed and will only show as a direct conversation.

Supported type of messages

- Text only post
- Text + file(s) post
- File(s) only post

Forwarding a message

1. Go to **Message** from the left navigation bar.
2. Select a conversation from the conversation list.
3. Hover over the message you want to forward, then click the **Forward** right arrow button at the far right.
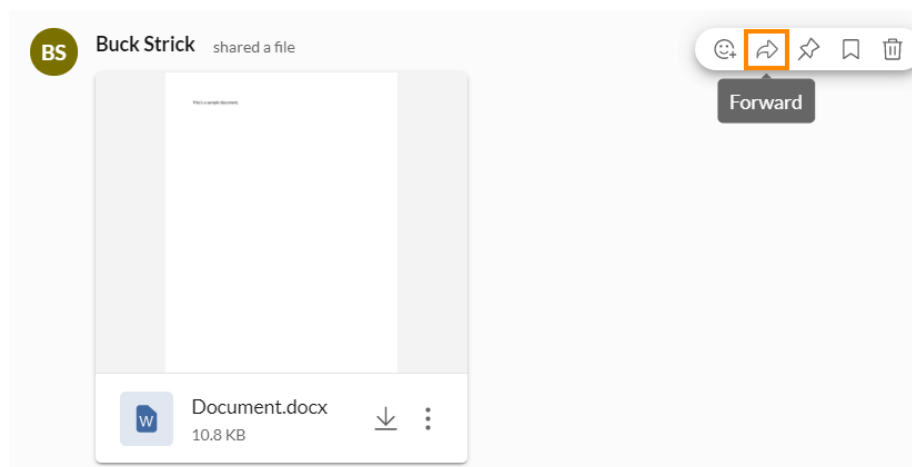
4. Type the name of the person or team name, or scroll through the list of your recent conversations.

Forward to ✕

🔍 Type person or team name

Recent conversations

- ⚙ Company
- ⚙ Finance
- ⚙ Calendar updates
- ⚙ Product Team
- JH Joe Hall
- Dulcinea Dunn
- Dulcinea, Jack
- BS Buck Strick (me)
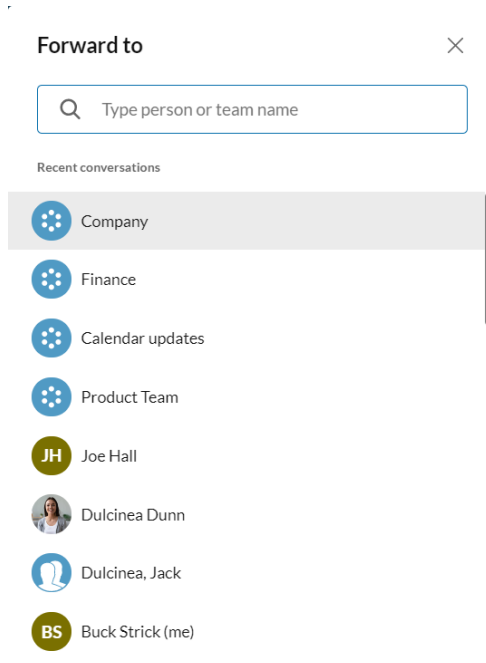
5. Click the conversation you want to forward the message to. Any messages or files are also forwarded to the chosen conversation.

Company ⭐ 🔒 👤 4   📹 ⋮

BS **Buck Strick** shared a file   😊 💬 ✏ ↪ ⋯

Buck Strick posted in a direct conversation

W Document.docx   ↓ ⋮
10.8 KB
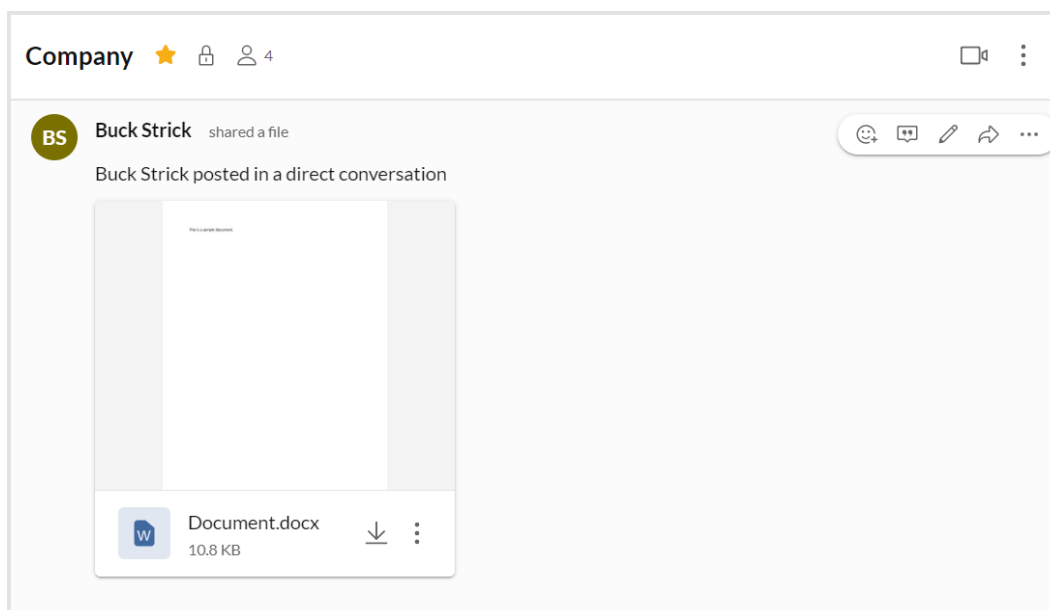
Creating a task from a message

The RingCentral app makes it easy to create a new task from a message post in any of your conversations. You don't need to copy the post and paste it in the new task description dialog input as it is automatically filled. This reduces the time for you to create tasks when the post already contains the information needed.

1. Navigate to **Message** via the left-hand navigation bar.
2. Select a conversation from the conversation list.
3. Hover your mouse over the message that you want to create as a task.
4. Click the **More** icon at the far right of the message.
5. Click **New task**. In the **New task** window, the message is automatically filled in the new task description dialog input at the bottom. You can edit this field to customize it.

6. Enter the **Task title**. This field is required.
7. The **Team** and **Assignees** fields are automatically filled in with the name of the person you're having a conversation with for direct messages. You can remove the name on the **Assignees** field or add other assignee(s). For group and team messages, the **Team** field is automatically filled, but the **Assignees** field is blank. You can click on **Add all** (number of members) or enter the name of the assignee(s). Note that the **Assignees** field is optional.
8. Select a **Due date** and **Due time** (optional).
9. Decide if you'd like the task to repeat via the **Repeat** dropdown (optional).

10. Decide the condition on which this task can be marked as complete via the **Complete when** dropdown (optional).
11. Choose a **Color tag** (optional).
12. Click **Post and close** to create the task and close the window
    OR
    Click **Post and new** to finish creating that task and open a new task to configure.

Read more about task settings in [Creating a task in the RingCentral app desktop and web](#).

Organizing conversations

Whenever you start a new conversation, that conversation will appear in your conversation list in the left pane. Your conversations are automatically separated into Direct messages and Teams. Additionally, you can create Folders and select Favorites to further organize your conversations.

You can conveniently group relevant conversations together by creating folders so that you can always access important information between multiple conversations.

Creating a folder

1. Navigate to **Message** via the left-hand navigation bar.
2. Click the **New folder** button at the bottom of the RingCentral app.
3. Enter the folder name.
4. Enter the names of the conversations you want to put into that folder.
5. Select **Create**.
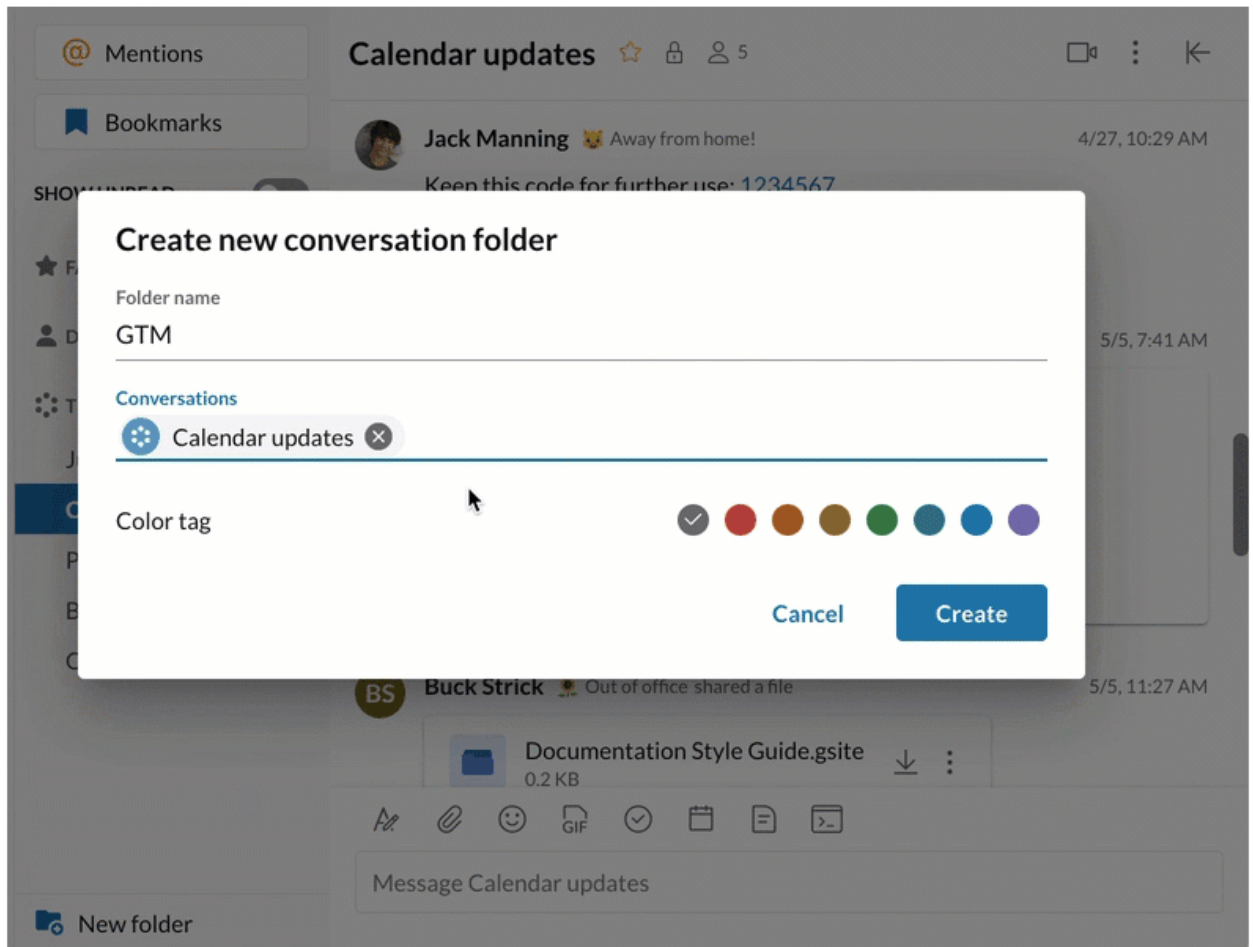
Moving a conversation to a folder

1. Navigate to **Message** via the left-hand navigation bar.
2. Hover over the conversation you want to move to a folder and select the **More** icon that appears at the far right of the name.
3. Click **Move conversation to….**
4. Select the folder you want to move the conversation to.

Creating a team

A team is a conversation held between a group of people within your company. Any RingCentral app user can create teams, and the person who creates a team automatically becomes that team's administrator.

There are several ways to create a team:

- Click the **New actions** plus button and select **Create team** from the dropdown menu.
- Hover over the Teams section in your conversation list and click on the **Create team** plus button that appears at far right.
- Convert a group into a team. To learn more, visit Converting a group to a team in the RingCentral app.

To create a team:

1. Click the **New actions** plus button located at the far right in the top bar.
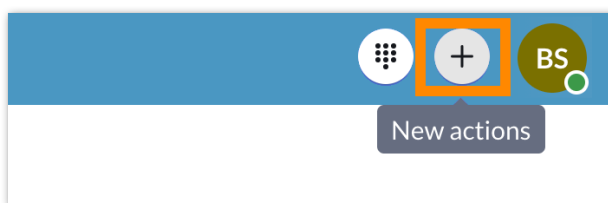
2. Select *Create team* from the dropdown menu.
3. Provide a name for your team in the **Team name** field.
4. Enter a list of names or email addresses in the **Members** field.
5. Provide a description in the **Team description** field (optional).
6. Choose either *Private* or *Public* from the **Type of team** dropdown (more on that below).
7. Toggle on or off each of the permissions at the bottom of the window (we'll review each of these permissions below).
8. Click **Create** to finish creating the team.

Once you've created your team, that team will appear under the **Teams** section in your conversation list. The number of teams that appear in your conversation list will depend on how you've configured your Message settings. To learn more, visit **Configuring message settings in the RingCentral app desktop and web.**

This is just one way you can create a team, but keep in mind there are several other methods you can use to create a team. To learn more, visit Creating a new team in the RingCentral app.
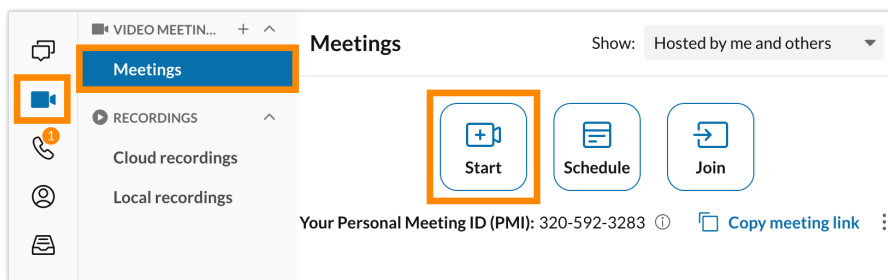
Once you've created a team, that team conversation will appear under the **Teams** section in your conversation list.

Using RingCentral Video

Starting a meeting

To start a meeting in the RingCentral desktop or web app, follow these steps:

1. Navigate to Video via the left-hand navigation bar.
2. Click the Start button at the top of the app to open a new window.

3. Connect your audio. For RingCentral Video, visit **Joining RingCentral Video audio on desktop and web**.
4. Invite participants. For RingCentral Video, visit **Inviting others to join a RingCentral Video meeting on desktop and web**.

Depending on the video service you chose when you configured your Video settings, you will have slightly different options for selecting the audio sources from which you'd like to start your meeting.

Scheduling a meeting

To schedule a meeting via the Video interface, follow these steps:

1. Navigate to **Video** via the side menu bar.
2. On the **Meetings** page, click the **Schedule** button at the top to open the **Schedule a meeting** window.
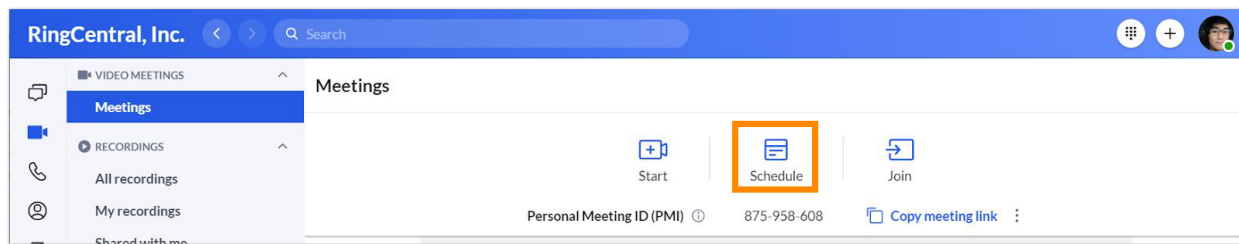
3. Update the **Meeting title** or leave as default.

4. Enter the meeting **Date**, **Time**, and **Duration**.
5. If you're scheduling on behalf of someone else, select the name of that person in the **Schedule for** dropdown.
6. In **Schedule using**, select whether you'd like to send your invite using Outlook or Google calendar, or if you want to share the invite via email, text, or other means.
7. Check the **Create team and invite members** box if you'd like to create a new team with your meeting participants.
    a. The **Team name** auto-fills with the meeting title.
    b. Add members by entering the name or email address of the meeting participants (separated by semicolon) that you'd like to add to the team.
8. Configure the remaining settings under the **Meeting settings** and **Advanced settings** dropdown.
9. Click the Schedule button to open the meeting in the calendar app you specified in the **Calendar** setting. You may be required to sign in and authenticate that calendar if you have not synced your calendar to the RingCentral app.
10. Configure your meeting invite, add your participants, and any additional info in the invite body.
11. Send the meeting invite.

Note: This is not the only method of scheduling a meeting in the RingCentral app. To learn more about the other methods available to you, visit Schedule a Meeting in the RingCentral App.

Configuring your RingCentral Video meeting settings

- **Meeting title**: Title of your meeting. This will be displayed during the meeting and be used for the recording's title. This will also be used for the meeting invite if selecting a calendar.
- **Date**: Date on which you'd like to host the meeting.
- **Time**: Time for which you'd like to host the meeting.
- **Duration**: Meeting duration in hours and minutes.
- **Schedule for**: Select if you want to schedule for yourself or select the person from the dropdown. Available if you are authorized to schedule a meeting on behalf of a co-worker. For more info, visit Setting delegates to schedule your RingCentral Video meetings.
- **Schedule using**: Select Outlook Calendar, Google Calendar, or Calendar app for the app you'd like to create the invite with, or select Meeting info to create a meeting ID and copy the meeting details to the clipboard. Choosing Meeting info allows you to still see and select specifics of the invite if needed. You can then paste the information anywhere and decide how to send the meeting invite.
- **Note**: If you have the Outlook app installed and use the desktop app, the dropdown will show two Outlook choices, one for Outlook web calendar and one for Outlook app calendar. Selecting Outlook web calendar opens the browser Outlook calendar. Selecting Outlook app calendar opens the Outlook app desktop interface. After scheduling your first meeting, the system defaults to the most recently selected option.
- **Note**: If you did not copy the meeting info details, you will need to recreate the meeting..
- **Participants**: If you're scheduling a meeting from a conversation, this is where you select the people to invite.
- **Create team and invite members**: Select if you want to create a new team with the meeting participants. This only appears if you're scheduling a meeting via the Video interface.
- **Team name**: Only available when you checked to Create team and invite members. The team name defaults with (your name)'s RingCentral Video Meeting. You can opt to change the team name, but this will create a separate team conversation.
- **Members**: Only available when you checked Create a team. Enter the name or email address of the meeting participants (separated by a semicolon) that you'd like to add to this team.
- **Use personal meeting [ID/name]**: Select to schedule the meeting with your Personal Meeting ID or name instead of a newly generated meeting ID. Using the Personal Meeting ID or name will use the settings of that meeting and apply to all meetings using PMID.
- **Require password**: Require a password to enter your meeting.
- **Participants can only join after me**: Only allow participants to join once the host starts the meeting.
- **Enable waiting room**: When enabled, the host controls when participants join the meeting. The host can set the waiting room to Everyone, Anyone outside my company, or Anyone not signed in.
- **Advanced settings**:
  - **Only authenticated users can join**: This allows only authenticated users to join your meeting. Options include *Off*, *Signed in co-workers*, and *Signed in users*.
  - **Turn off camera for participants**: This immediately turns off the camera for participants when they enter the meeting. Participants can still turn their cameras on at any point during the meeting.

- ○ **Mute audio for participants**: This mutes participants when they enter the meeting. Participants can still unmute their audio at any point during the meeting.
- ○ **Only host & moderators can share screen**: Enable this option to allow only you (as host) and moderators to share their screen in a meeting.

Joining a meeting

1. Navigate to **Video** via the side menu bar.
2. On the **Meetings** page, join the meeting in one of two ways:
   a. Select the **Join** button at top right to open the **Join a meeting** window.
      i. Enter the Meeting ID or link in the **Meeting ID** field.
      ii. Click the **Join** button to open that meeting in a new separate window.
   b. Click the **Join** button at the far right of the meeting.
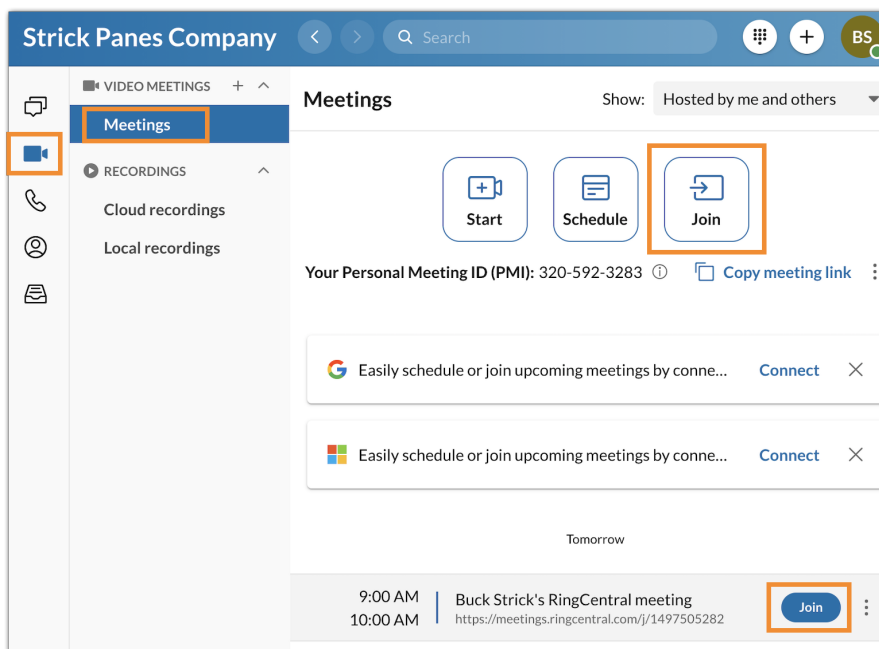
3. If the meeting creator has required a password, provide the password to join that meeting.
4. Configure your audio sources in the meeting that opens on your device.

To know more about joining a meeting, visit Joining a meeting on the RingCentral app desktop and web.

Sharing your screen in RingCentral Rooms

Participants in RingCentral Rooms can use one-click direct screen sharing from the RingCentral app for desktop and web with Proximity Sharing. Proximity Sharing enables the controller to generate an ultrasonic signal that can be detected by the RingCentral app and automatically connect to the RingCentral Rooms Controller when a participant clicks **Share Screen**.

Enabling Proximity Sharing for RingCentral Rooms

1. Navigate to Settings via the left-hand navigation bar.
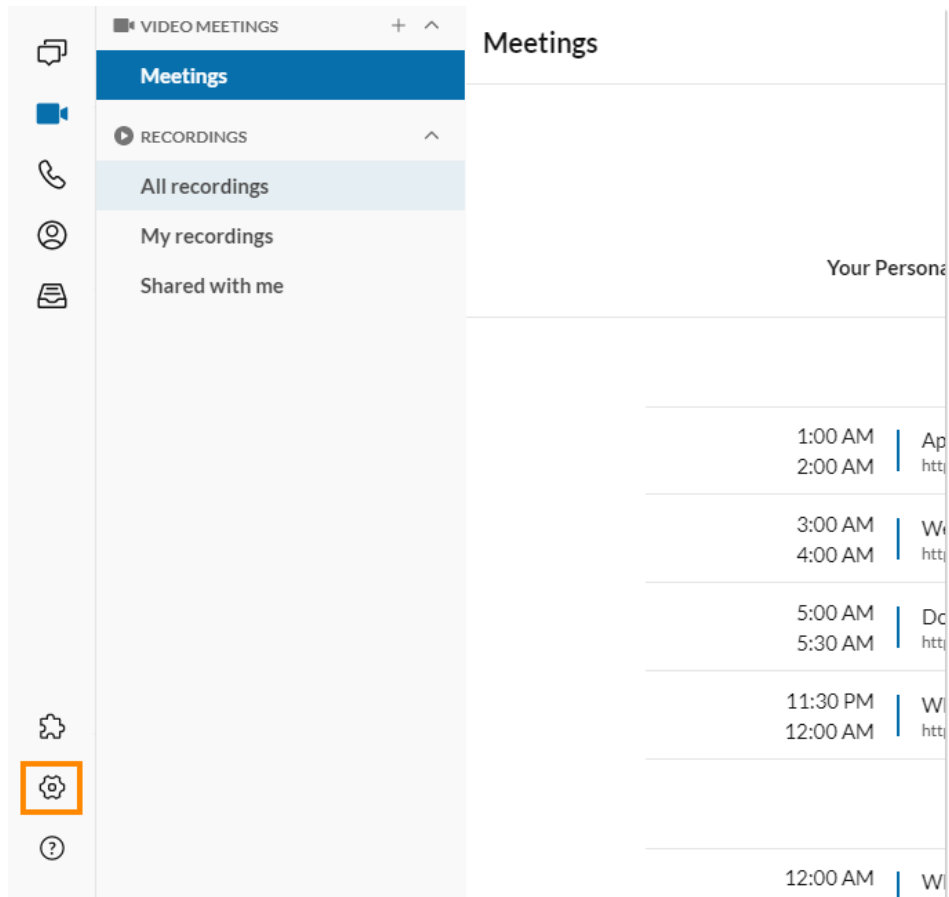
2. Click on the **Video** tab in the left pane.
3. Toggle on the **Display Share in Room** option setting under **Share in Room**.

Video

General

Video service
Choose your preferred app for using video services

RingCentral Video ▼

RingCentral Video Embedded (POC)
Enable RingCentral Video embedded (POC) for video calls and meetings.

Video meeting settings
Open RingCentral Video settings

Edit

Personal Meeting ID
Open RingCentral Video settings to manage your Personal Meeting ID and related settings

Personal Meeting ID link: https://v.ringcentral.com/join/835349594

Edit

Share in Room

Display Share in Room option
Allow screen sharing in meeting rooms with compatible Room systems
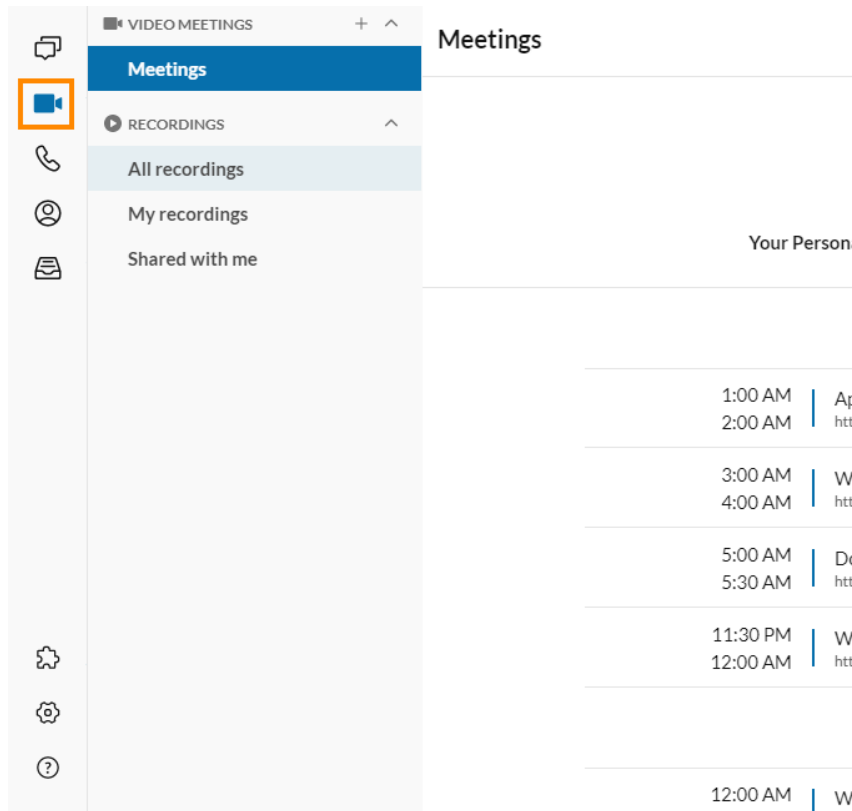
Screen sharing

Do Not Disturb (DND) while screen sharing
Turn on Do Not Disturb automatically to block all notifications and incoming video calls on all devices while sharing your screen.
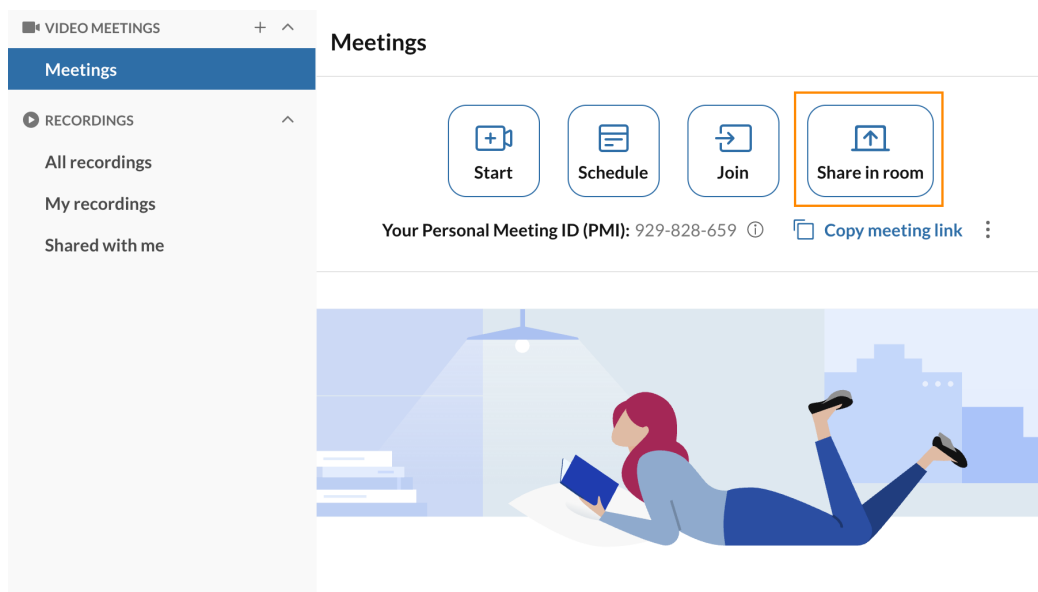
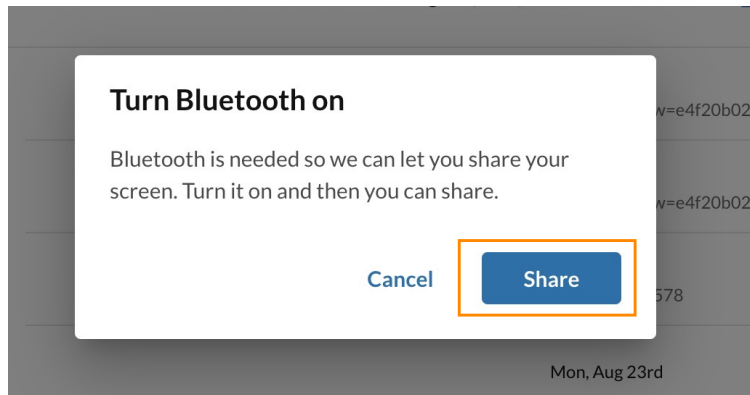## Using Proximity Sharing for RingCentral Rooms

1. Navigate to **Video** via the left-hand navigation bar.

2. Click on the **Meetings** tab in the left pane.
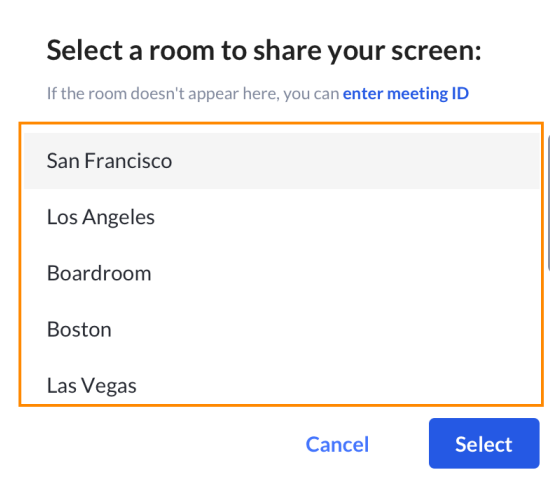3. Click **Share in room**.

Note: If you haven't allowed RingCentral Rooms to access your Bluetooth, you will receive a prompt asking for Bluetooth access. Click **Share** to give RingCentral Rooms access.
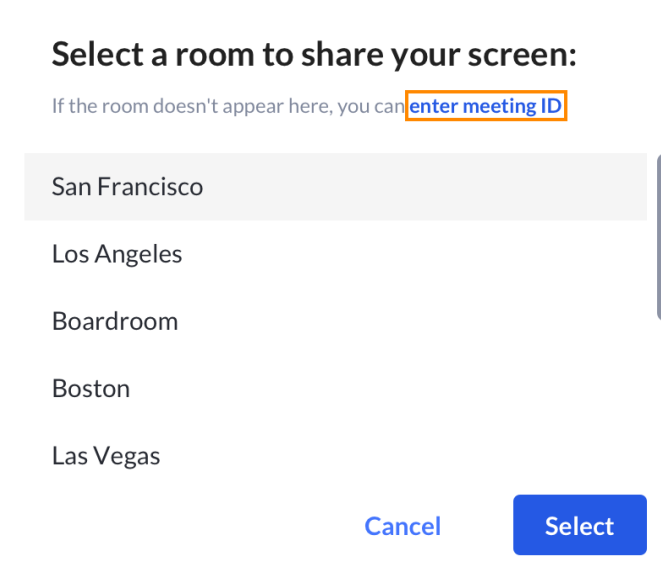
Turn Bluetooth on

Bluetooth is needed so we can let you share your screen. Turn it on and then you can share.

Cancel   **Share**

Mon, Aug 23rd

4. Select the Room you want to share in. You can find the Rooms using these methods:

a. Proximity: If there are Rooms nearby, you will get a list of the available Rooms.

Note: This is only available for RingCentral app for desktop. Web users can only share via a Meeting ID.

Select a room to share your screen:

If the room doesn't appear here, you can **enter meeting ID**

San Francisco

Los Angeles

Boardroom

Boston

Las Vegas

Cancel   **Select**

b. Meeting ID: If you can't find your Room via proximity, you can enter the meeting ID by clicking on **enter meeting ID**.

Note: This option will automatically show if no Rooms are detected after 10 seconds.

Select a room to share your screen:

If the room doesn't appear here, you can enter meeting ID

San Francisco

Los Angeles

Boardroom

Boston

Las Vegas

Cancel   Select

5.   Select the screen you want to share.

Stopping screen sharing

You can stop screen sharing from the RingCentral app by clicking on the **Stop sharing** button on the **Meetings** tab.

Start   Schedule   Join   Stop sharing

Your Personal Meeting info ⓘ
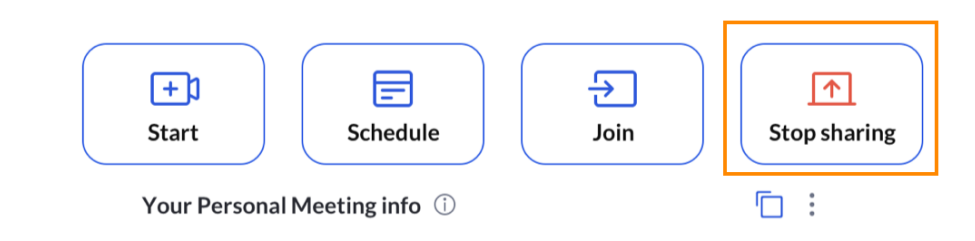
# Using Presentation Modes in a RingCentral Video meeting

Make your training sessions and sales presentations in RingCentral Video more impactful and immersive with Presentation Modes.

Presenter overlay mode

The Presenter overlay mode allows you to show your camera while using your presentation as the background. You can use this feature via your web browser (Chrome and Edge) or the RingCentral desktop app. You can also adjust the transparency of your video to make sure you're not covering up any important information.

Using the Presenter overlay mode

1. When in a RingCentral Video meeting, click the **More** button at bottom right.
2. Select **Presentation mode**. This opens the **Settings** window.
3. Click **Overlay**.
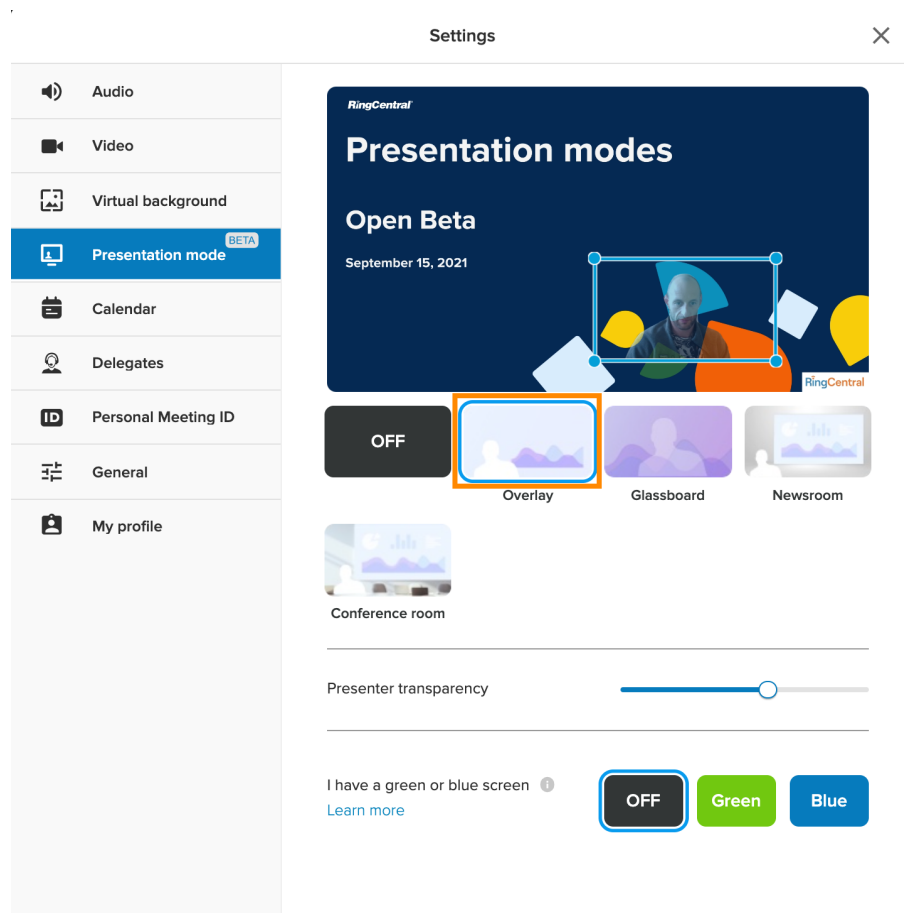
4. You can also select an option for <u>I have a green or blue screen</u>

       a. **Off**
       b. **Green**
       c. **Blue**

5. Configure the position and size of your video by dragging the blue rectangle on the preview screen.
6. Configure the transparency of your video.
7. Close the **Settings** window.
8. Click the **Share** button at the bottom and select a screen to share.
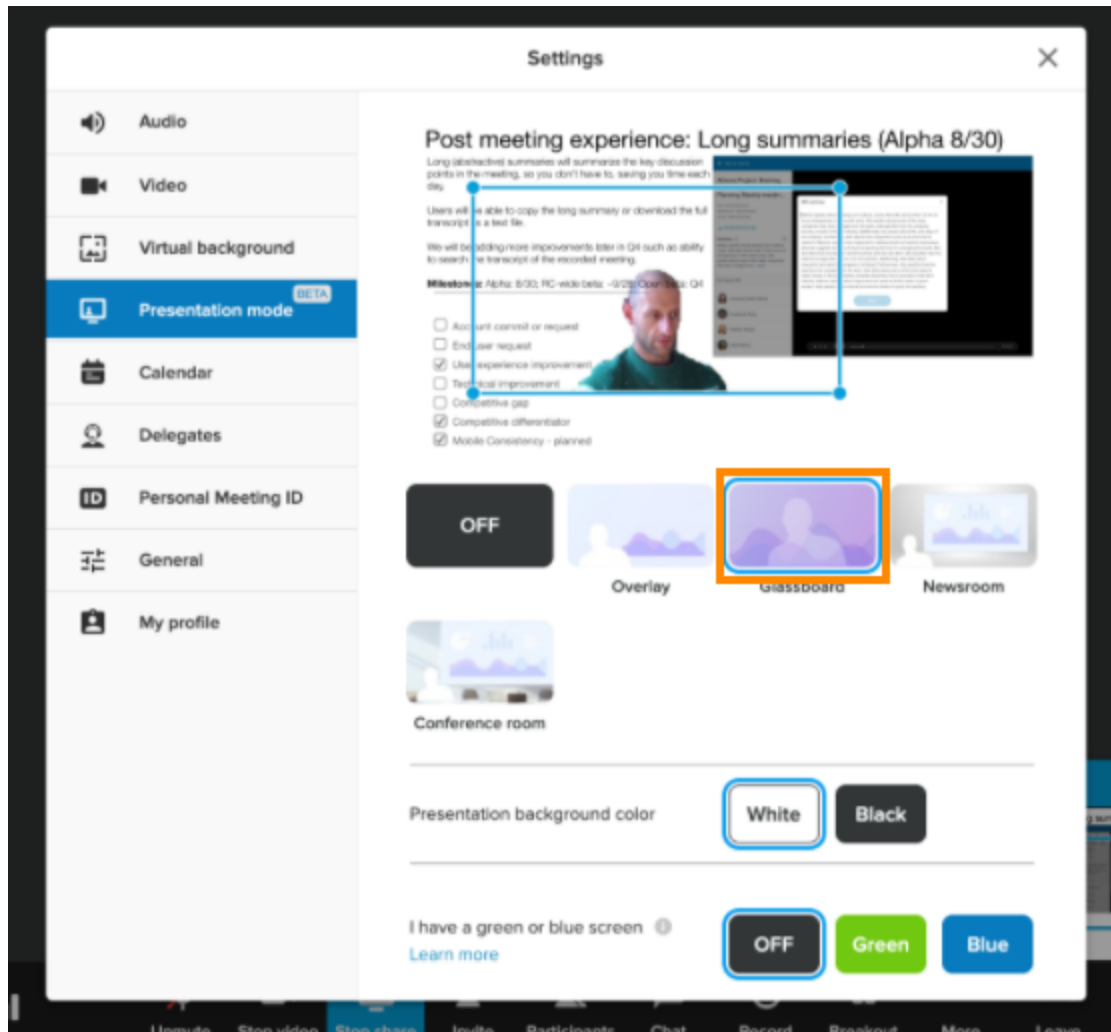9. Click **Share**.

Glassboard mode

Glassboard mode makes it look like you're behind your presentation by making your video transparent through primarily white or black colors in your presentation.

Glassboard mode works with online white-boarding tools such as Miro or with any presentation of consistent color (either mostly white or mostly dark).

Using Glassboard mode

1. When in a RingCentral Video meeting, click the **More** button at bottom right.
2. Select **Presentation mode**. This opens the **Settings** window.
3. Click **Glassboard room**.
4. Select the primary background color of your presentation.
       a. White
       b. Black

5. You can also select an option for <u>**I have a green or blue screen**</u>.
   a. **Off**
   b. **Green**
   c. **Blue**
6. Close the **Settings** window.
7. Click the **Share** button at the bottom and select a screen to share.
8. Click **Share**.

Newsroom mode

The Newsroom mode is designed to give you the most presentation real estate while keeping your video to the side and ensuring it doesn't overlap with your presentation.

Using Newsroom mode

1. When in a RingCentral Video meeting, click the **More** button at bottom right.

2. Select **Presentation mode**. This opens the **Settings** window.
3. Click **Newsroom**.
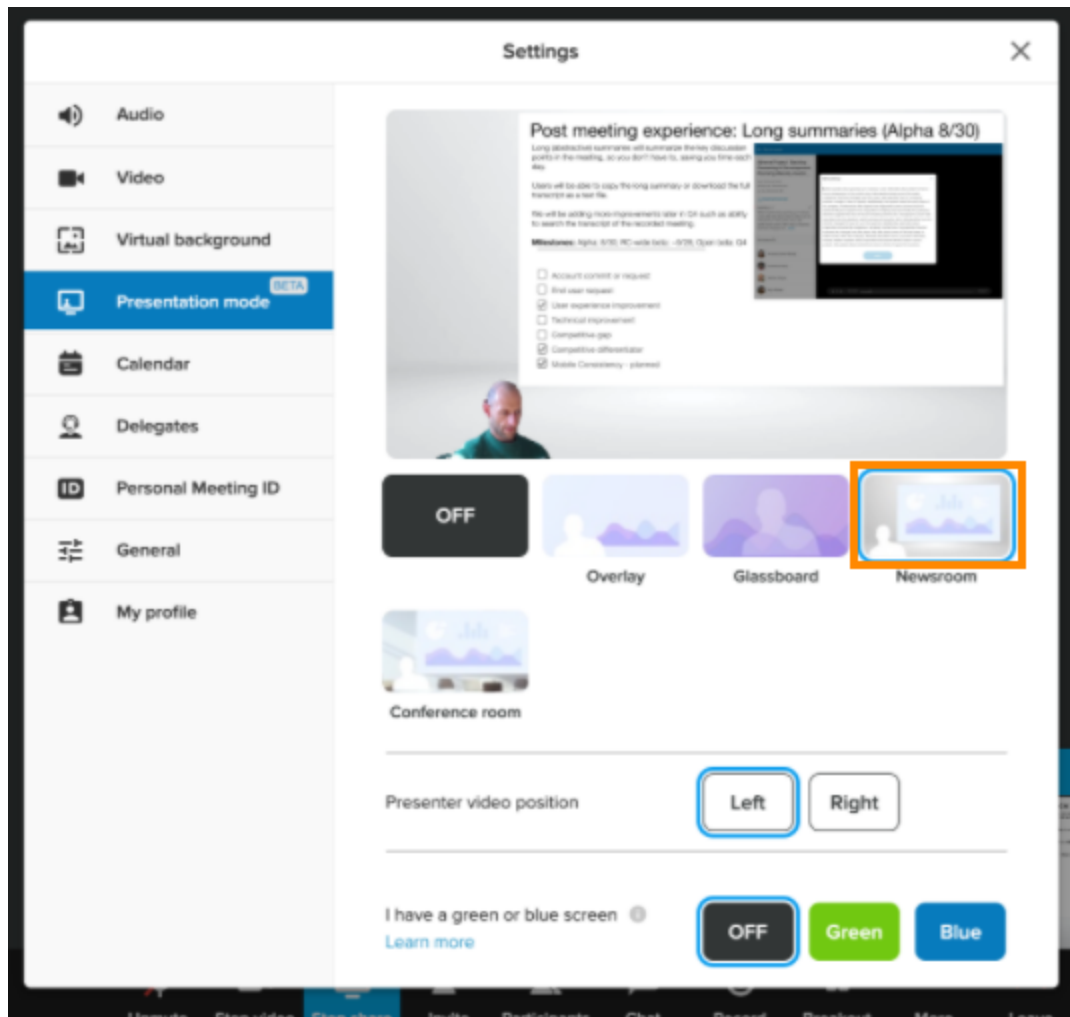
4. You can also select where you want to position your video during the presentation.
   a. **Left**
   b. **Right**
5. You can also select an option for **<u>I have a green or blue screen</u>**.
   a. **Off**
   b. **Green**
   c. **Blue**
6. Close the **Settings** window.
7. Click the **Share** button at the bottom and select a screen to share.
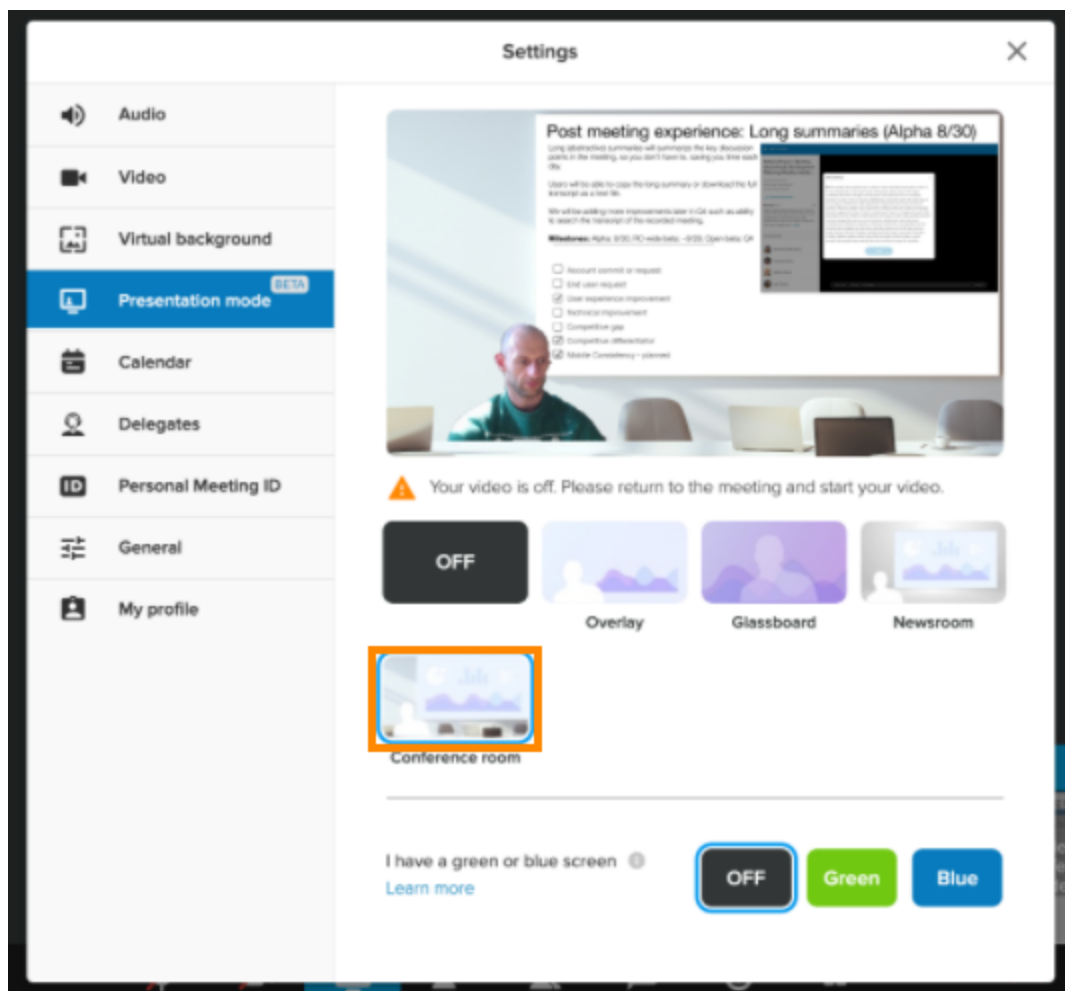8. Click **Share**.

Conference room mode

Conference room mode gives your presentation a more immersive feeling, like you're in a real conference room.

Note: Make sure your camera is positioned far enough away from you to provide a realistic perspective.

Using Conference room mode

1. Click the **More** button at bottom right.
2. Select **Presentation mode**. This opens the **Settings** window.
3. Click **Conference room**.

4. You can also select an option for <u>I have a green or blue screen</u>.
   a. **Off**
   b. **Green**

c. **Blue**
5. Close the **Settings** window.
6. Click the **Share** button at the bottom and select a screen to share.
7. Click **Share**.

## Best practices when using Presentation mode

- Practice the position of your video before your presentation and as you transition slides. You can always change the position of your video in your video settings during the meeting.
- Be mindful of your hands — when using your hands to explain something, make sure to keep your hands inside the video camera frame.
- Consider using a green screen. For more information about green screens, see **Using a green screen with RingCentral Virtual Background and Presentation mode**.

Using the Phone menu of the RingCentral app

Making a call

You can make a call right within the RingCentral app to other users in your organization, and if your extension has a DigitalLine, you can also make outgoing calls to external phone numbers. To use this feature, your app administrators must first enable phone features at the account level.

Additionally, for users with Digital Lines, you must also ensure that your emergency address is up to date, otherwise, you will be limited to only making calls to other people within your company. See Configuring phone settings in the RingCentral app desktop and web and Phone Numbers - RingCentral DigitalLine Overview to learn more.
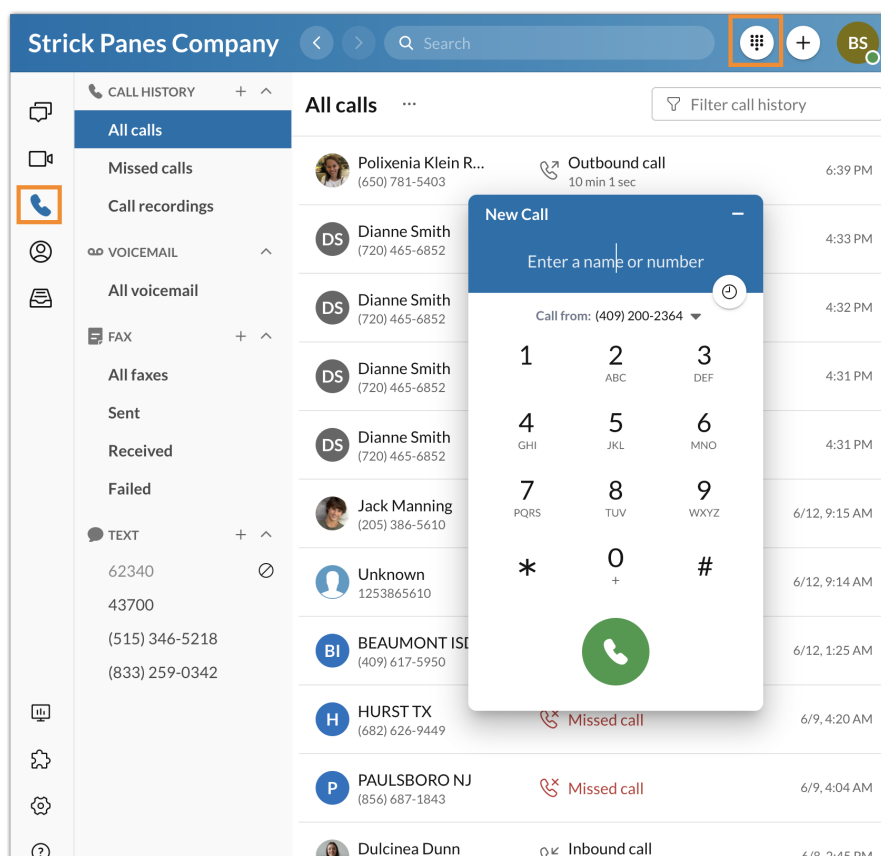
There are several ways you can make a call in the RingCentral app. You can start a call via the following methods:

- Selecting the Dial pad icon at top right
- Hovering your mouse over the Call History section via the Phone menu and selecting the Start call plus button that appears at far right
- Clicking on the Call phone icon anywhere you see it within the app

To make a call using the dial pad:

1. Navigate to the **Phone** menu via the side menu bar.
2. Click the **Dial pad** icon at the top right
3. Leave the default Caller ID or select a new number in the **Call from** the dropdown list
4. Enter a number in the dial pad and dial the number in one of two ways:
   a. Type a name or phone number of the person you'd like to call to populate a list of options below
      i. Select the contact you'd like to dial to start a call
   b. Manually press the keys on the dial pad to dial a number
      i. Click the green button at the bottom to start the call

To learn more about making a call in the RingCentral app, visit Make a Call in the RingCentral App for Desktop or Web.

Taking a call

You can easily take a call using the app whenever someone calls your RingCentral number. When you have an incoming call, a pop-up window will appear, from which you can select from the following options:

- **Answer**: Click this button to answer the incoming call
- **To Voicemail**: Click this button if you want to send the caller to your voicemail to leave a message. To use this effectively, configure your voicemail settings in your online account. See Manage Your RingCentral App Voicemails to learn more
- **Ignore**: Click this button if you do not want to answer the call and ignore the call instead of sending the caller straight to your voicemail
- **More**: Select the ellipsis icon to reveal the following options:
  - *Forward*: Select this option if you want to forward a call to another user. When selected, you will be prompted to forward the number to your available number or a custom number.
  - *Reply*: Select this option if you want to message the caller with a preset or custom message. If you want to reply with a preset message, double click on the message. If you want to reply with a custom message, enter your message in the field and then press **Enter.**
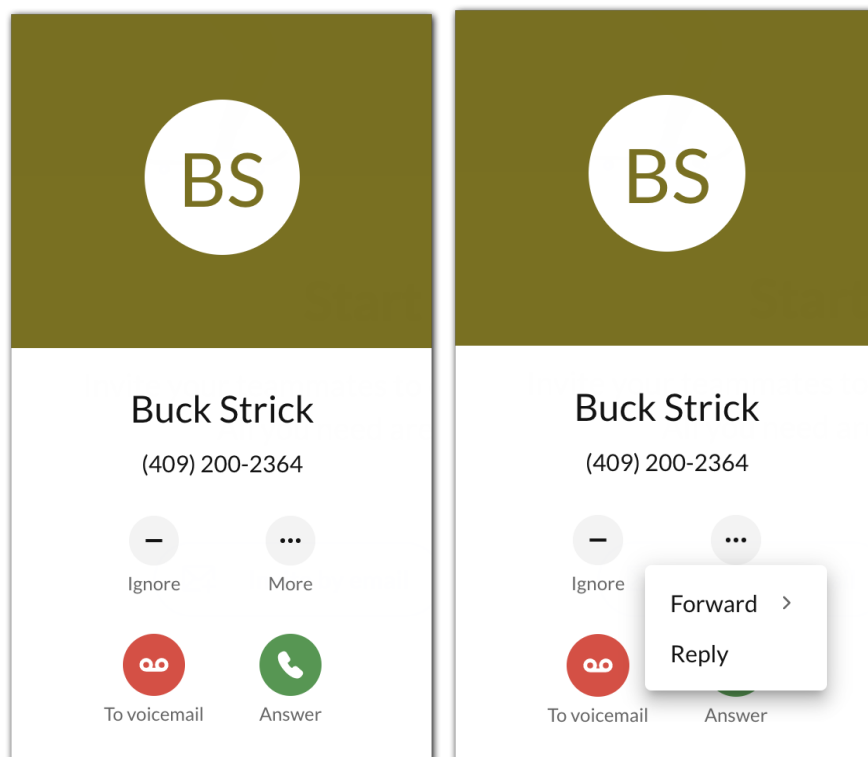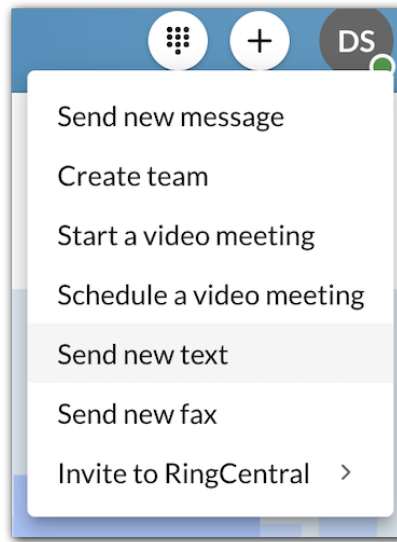
To learn more, visit [Take a Call in the RingCentral App for Desktop or Web](#).

Sending a text message

To send a text message in the RingCentral app, follow these steps:

1. Click the **New actions** plus button located at top right.
2. Select *Send new text* from the dropdown menu.

3. If you have several Caller IDs assigned to you, click inside the **Text from** field and select the Caller ID you'd like the text to come from.

4. Enter the name or phone number of the person you'd like to text in the **To** field.
5. Click the **Next** button to navigate to the text message conversation.
6. Draft a message in the message field at the bottom of the app.
7. Send the text message by pressing Enter or Return on your keyboard.

If you'd like to learn more, visit [Send a Text Message in the RingCentral App for Desktop or Web](#).

Using the HUD

The head-up display (HUD) in the RingCentral app provides you with advanced phone functionality and keeps your frequently used extension list at your fingertips. The HUD also lets you see user extensions in real-time whether they are available or engaged in a call

Enabling the HUD feature via RingCentral app desktop

1. Navigate to **Settings** via the left-hand navigation bar.
2. Click on the **Phone** tab from the left pane.
3. Enable the toggle switch for the **HUD** feature under the **Head-up display (HUD)**.

Note: Once the HUD feature is enabled, you can enable the **Ring when extensions I am monitoring receive incoming calls** option if the RingCentral app is your default phone app. You will then receive call notifications when somebody you are monitoring receives a call.

Navigating the HUD interface

To view the extensions in your HUD after enabling the feature, navigate to **Phone** via the left-hand navigation bar, then click the category to be displayed:

- **Extensions**: View user extensions.
- **Conferences rooms**: View delegated calls.
- **Delegated calls**: Join or make a conference call.
- **Parked locations**: View parked calls.

Note: By default, only the Delegated calls category is displayed. The other categories require an admin setup. Contact [customer support](#) to learn more.

Sending a fax

To send a fax via the New actions button, follow these steps:

1. Select the **New actions** plus button located at top right.
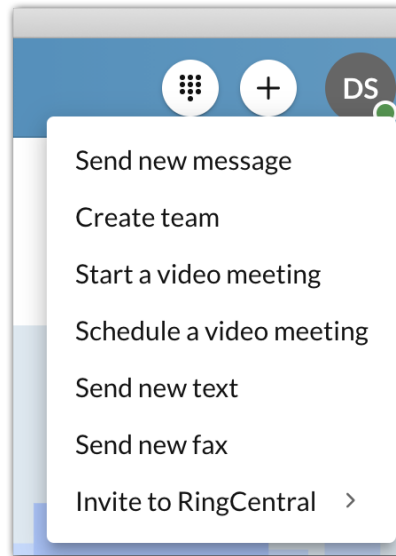
2. Click *Send new fax* from the dropdown menu.

3. Enter a fax number in the **To** field.
4. Select a theme for your cover page via the **Cover page** dropdown menu (default is *Contempo*).
5. Add any notes in the **Cover page note** text box (optional).
6. Select the **Attach file** paperclip icon and select any files you'd like to fax.
7. Choose to perform one of the following:
    a. Select **Send now** to send the fax immediately OR
    b. Select **Send later** to open the **Pick date and time** window.
        i. Choose a **Due date**
        ii. Specific a **Due time**

iii.   Select the **Schedule** button to schedule your fax

To learn more, visit [Send and Receive a Fax in the RingCentral App](#).

Setting up work hours

By default, your work hours are set to a 24/7 format. You can set your work hours to a specific schedule on the Phone settings page in the RingCentral app.

Configuring your work schedule

1. Navigate to **Settings** via the left navigation bar.
2. Click the **Phone** tab on the left pane.
3. Under **Genera**l, click the **Edit** button for **Work hours**.
4. Select *Specific work schedule.*
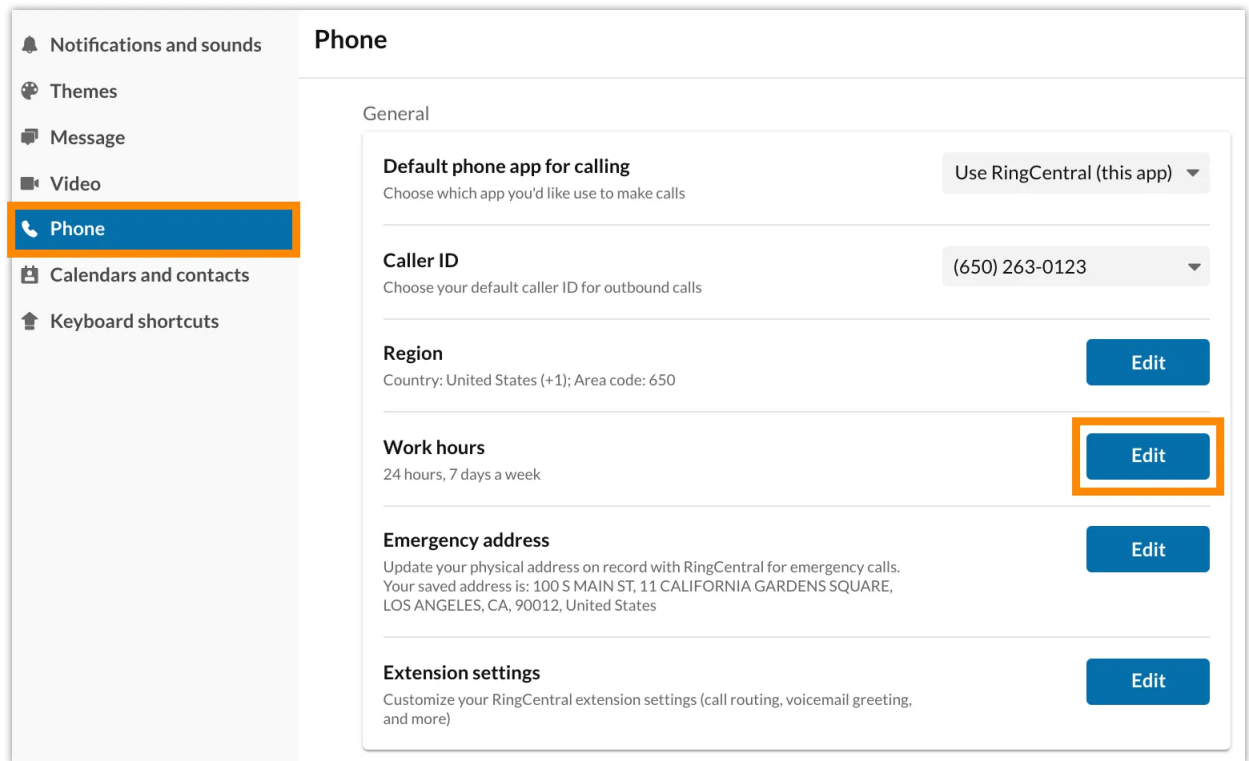
5. Set your **Time zone** from the dropdown list.

6. Set your work schedule from **Sunday** to **Saturday**.

7. Click **Apply to** at far right of the schedule you want to copy to Weekdays or All days (optional).
8. Click **Save**.

Setting up user call forwarding

You can configure call forwarding during the account setup process and make changes in Phone settings.

Setting up user call forwarding during account setup

Configuring this feature during account setup is only for small and medium business (SMB) customers. Not sure which customer you are? Click here to learn more. Read RingCentral MVP and Video plans to learn more about different plans.

1. Click **Review** or **Edit** on the Review your call handling card.
2. Click **Call forwarding**.
3. Set the **Ring order**. You can select from a simultaneous or a fixed order.
4. Configure the length of ring time for each forwarding number.
5. Click **Save**.

Setting up user call forwarding in Phone settings

1. Navigate to **Settings** via the left-hand navigation bar.
2. Select **Phone** on the left pane.
3. Scroll down to **Incoming calls**.
4. Click the **Edit** button at the far right of **Call forwarding** to open the Call forwarding window.
5. Configure the length of ring time for each forwarding number.
6. Set the **Ring order** setting.
   a. If *Simultaneous* is selected, add one or more phone numbers.
   b. If *Fixed order* is selected, add one or more phone numbers and determine the call order.
7. Click **Save**.

Ring order options

- Simultaneous: Rings forwarding phones at the same time. If you have added multiple phones, you will not be able to change their order.

- Fixed order: Rings forwarding phones one at a time. If you have added multiple phones, your primary phone will always ring first, and then the next phone, depending on how you set the order of your phones. You can reorder your phones by dragging and dropping to your preferred order.

Launching an application or URL on an incoming call

Launching an application or URL on an incoming call allows you to configure a command that will launch when you receive an incoming call. This command can include opening a URL, opening an app you have on your computer, or running a script you have.

In all of the above cases, you choose from a list of supported parameters passed along with the command.

1. Sign in to RingCentral app.
2. Go to **Settings > Phone > Advanced incoming calls**.
3. Toggle the slider to enable **Launch an external app or a URL on incoming calls**. The **Manage external apps or URLs for incoming calls** window will pop up.
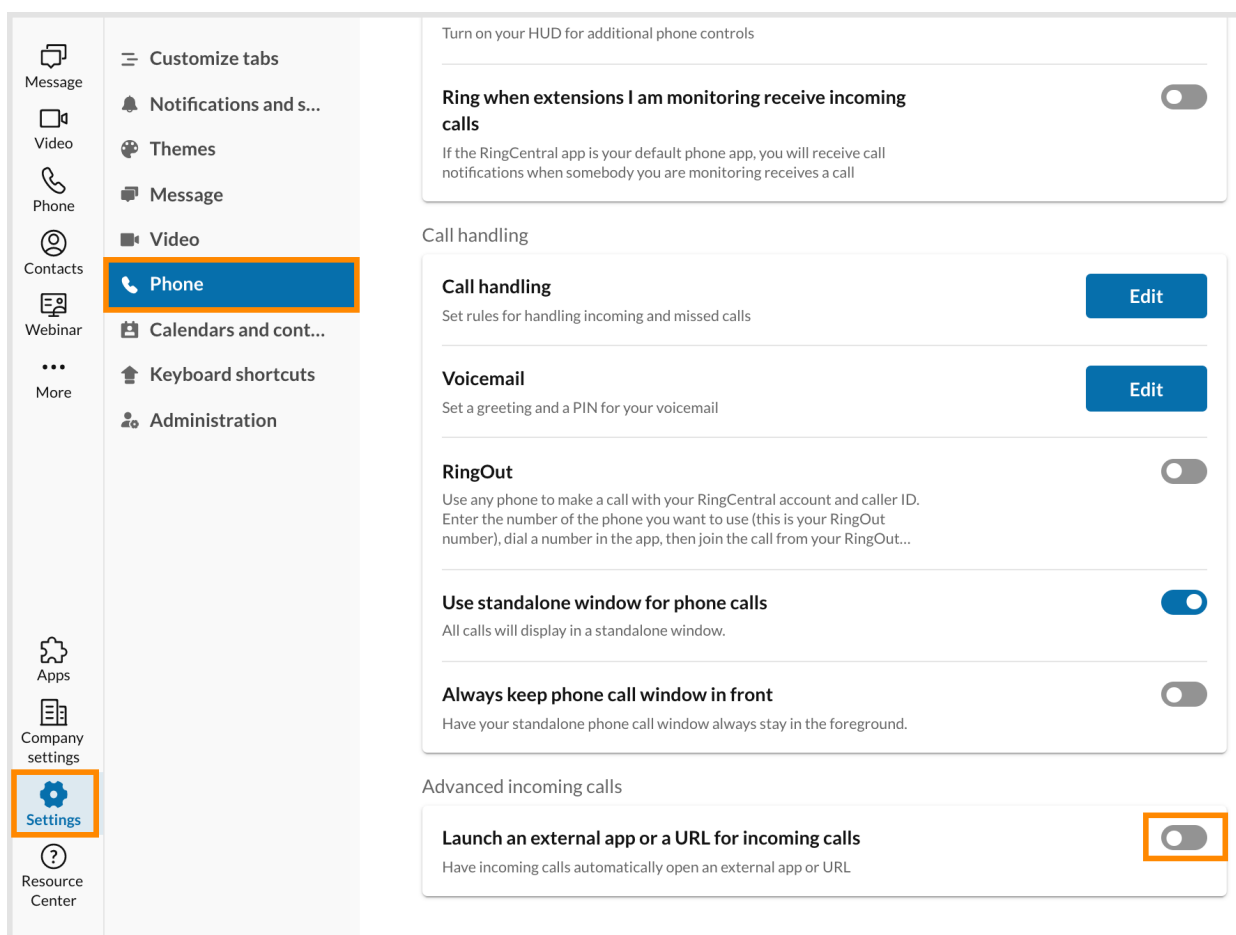
4. Enter a URL in the **Enter command** field or click the **Browse** icon to choose an application. You can launch an application on both the RingCentral app desktop and web.

Manage external apps or URLs for incoming calls

Note: Launching an external app may impact the performance of RingCentral services.

Enter command

https://www.salesforce.co   [□]   (Test)

Help: Use the parameters below in your commands.

Parameter	Usage
%N	Full name
%F	First name
%L	Last name
%D	Called number
%P	Formatted phone number: (650) 555-4092 Examples: • Launch URL http://www.mysite.com/myintegration.htm?number=%P This example launches a browser, opens a webpage, and passes the caller's phone number details. • Launch app

Cancel   **Save**

5. Click the **Test** button to test launching the application.
6. Click **Save**.