

# RingCentral app

Desktop and web

Getting started guide

V23.1

## Table of contents

<b>Introduction</b>	<b>7</b>
Requirements	7
RingCentral app components	7
Message	8
Video	9
Phone	10
Contacts	11
Messaging notification apps	12
<b>Getting started</b>	<b>13</b>
Downloading and installing the RingCentral app	13
Downloading and installing the app for Windows	13
Launching the app silently	13
Checking the chip on your Mac computer	14
Downloading and installing the app for Mac with Intel Processors	14
Downloading and installing the app for Mac with Apple Silicon Processors	14
Logging in to the RingCentral app desktop and web	15
Logging in using your preferred login method	15
Logging in using the RingCentral sign-in form	16
Logging in using your Google account	17
Logging in using Single Sign-on	18
In-app activation	18
<b>Navigating the RingCentral app for web and desktop</b>	<b>19</b>
Left-hand navigation bar	19
Top header bar	20
Left pane	21
Quick creation	21
Center pane	21
Navigating the Contacts menu	22
Left pane	23
Contacts	23
Quick contacts	24
Teams	25
Team Administration	25
Configuring notifications and audio	26
Notifications	26
Audio	28
Email notifications	28
Audio sources	28
Headset support	29
Using keyboard shortcuts	29
Accessing keyboard shortcuts	29
Navigating the Apps interface	29
Left pane	30

Discover apps	30
Right pane	31
Using the Resource Center	32
Accessing the Resource Center	32
Resource Center tabs	33
<b>Searching for a user, conversation, or setting</b>	<b>35</b>
<b>Adding or managing users</b>	<b>35</b>
Inviting new users	36
Inviting new users by email	37
Inviting new users by text	37
Inviting new users by sharing a link	38
Managing guests	38
Managing the guest badge	40
Configuring external guest settings	40
Blocking guests from the Contacts page	41
Blocking guests from profile	41
<b>Using RingCentral Message</b>	<b>42</b>
Sending a message	42
Muting a conversation	43
Attaching a file in a message	43
Attaching a file from your computer	43
Attaching a file from Google Drive	45
Attaching files from OneDrive/SharePoint	46
Attaching a file from Dropbox	47
Attaching a file from Box	48
Forwarding a message to another conversation	49
Supported type of messages	49
Forwarding a message	49
Marking a message as unread	50
Marking a message as unread in conversation	50
Viewing unread messages in a conversation	51
Editing a message	51
Deleting a message	52
Creating a task from a message	52
Organizing conversations	54
Creating a folder	54
Moving a conversation to a folder	55
Revising dialogs	55
Creating a team	57
Assigning a team member as an admin	59
Creating an event	60
Creating events in the Workspace menu	60
Creating events in a conversation	61

Viewing team events calendar	61
Viewing team events in the conversation details	61
Viewing team events calendar in the Workspace menu	62
Finding an event in the Workspace menu	63
Showing in a conversation	64
<b>Using RingCentral Video</b>	<b>65</b>
Starting a meeting	65
Scheduling a meeting	65
Scheduling a video meeting in a conversation	67
Scheduling a video meeting from the new actions button	68
Configuring your RingCentral Video meeting settings	70
Joining a meeting	72
Using the meetings page	72
Using only audio	73
Using RingCentral Video attendee controls	74
Sharing your screen in a meeting	75
Optimizing screen share for video	75
Using the whiteboard during a meeting	76
Enabling whiteboard	76
Sharing a nonverbal reaction during a meeting	76
Viewing participants who shared nonverbal reactions	78
Sharing your screen in RingCentral Rooms	78
Enabling Proximity Sharing for RingCentral Rooms	79
Using Proximity Sharing for RingCentral Rooms	81
Stopping screen sharing	84
Scheduling a webinar	84
Using Presentation Modes in a RingCentral Video meeting	86
Overlay mode	86
Using the Presenter overlay mode	86
Glassboard mode	87
Using Glassboard mode	88
Newsroom mode	89
Using Newsroom mode	89
Conference room mode	90
Using Conference room mode	90
Best practices when using Presentation mode	91
Requesting and approving remote desktop control	92
Limitations	92
Requesting remote desktop control during a screen share	92
Approving support remote desktop control during a screen share	93
Approving support remote desktop control request	94
Removing background noise during a RingCentral Video meeting	95
Using Remove my background noise	95



Viewing and managing RingCentral Video meeting recordings	97
Viewing and managing meeting recordings from the recording overview	97
Finding the overview of a meeting recording	97
Viewing and managing recordings from the recording overview	97
Viewing and managing meeting recordings from the recording detail window	102
Finding the detail window for a meeting recording	102
Viewing and managing recordings from the detail window	103
Viewing and managing meeting materials from the right side of the recording detail window	108
Managing notification settings for meeting recordings	113
Switching a RingCentral Video meeting from desktop to mobile	115
Switching a RingCentral Video meeting from mobile to desktop	115
<b>Starting a conference call</b>	<b>116</b>
Starting a conference call using the new actions button	116
Starting a conference call from Message	117
Starting a conference call from Phone	118
Starting a conference call on behalf of another user	119
<b>Using the Phone menu</b>	<b>119</b>
Making a call	119
Taking a call	121
Transferring a call	122
Warm transferring a call	122
Cold transferring a call	124
Transferring a call to voicemail	125
Transferring calls using Heads-up display (HUD)	125
Sending a text message	126
Marking a text message as unread	127
Configuring phone settings	127
Incoming calls settings	128
Outgoing calls settings	128
General settings	128
Using the HUD	130
Enabling the HUD feature via RingCentral app desktop	130
Navigating the HUD interface	130
Using Call Queue Pickup via the HUD	130
Setting up work hours	132
Configuring your work schedule	132
Setting up user call forwarding	133
Setting up user call forwarding during account setup	133
Setting up user call forwarding in Phone settings	134
Setting up the Forward all calls feature	135
Where to forward your calls	136

Ring order options	137
Launching an application or URL on an incoming call	138
Using the fax menu	140
Sending a fax	140
Viewing and managing a fax	142

## 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.

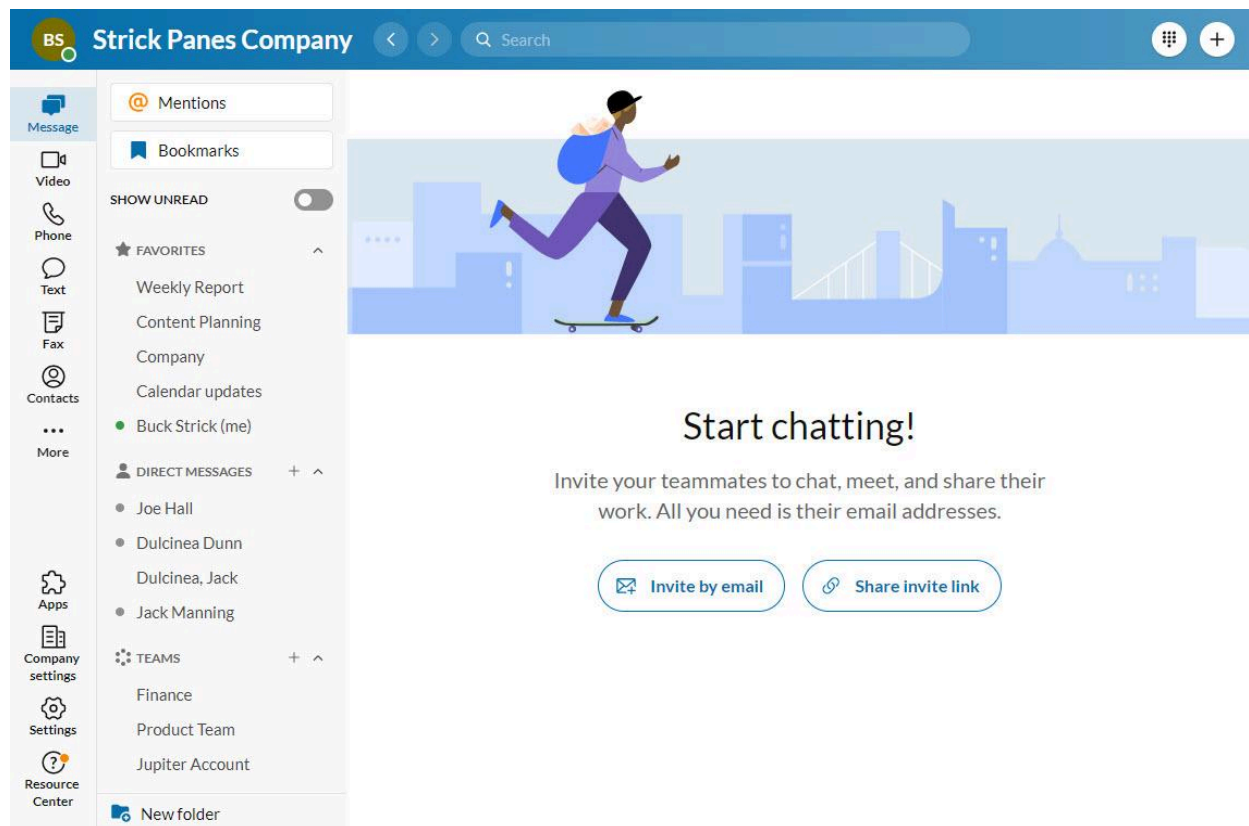
Let's review what you can do with each of these main components.

## 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

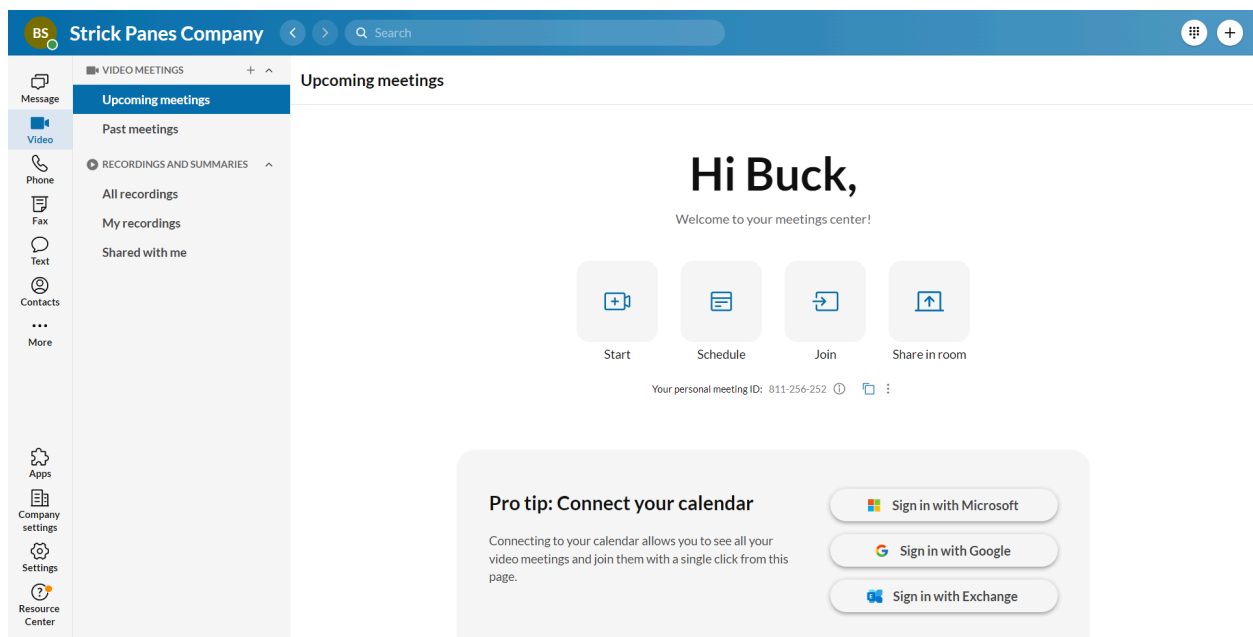
To learn more about what you can do with messaging, visit [Intro to Message in the RingCentral app](#).



## 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

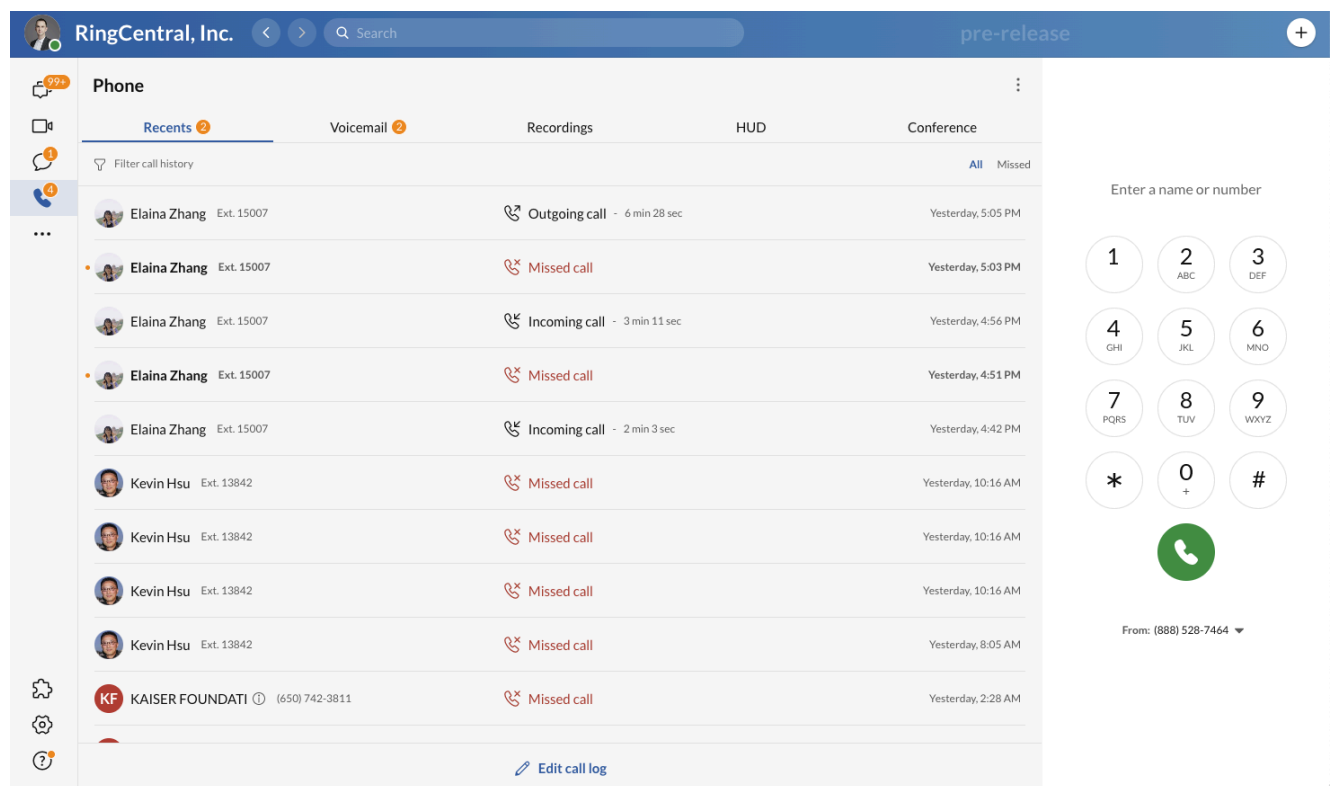


## Phone

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
  - You can also [bulk delete](#) call logs.
- Perform call controls such as Call Flip, call switch, call transfer, and call park
- Easily navigate to the dialer from the main Phone menu.

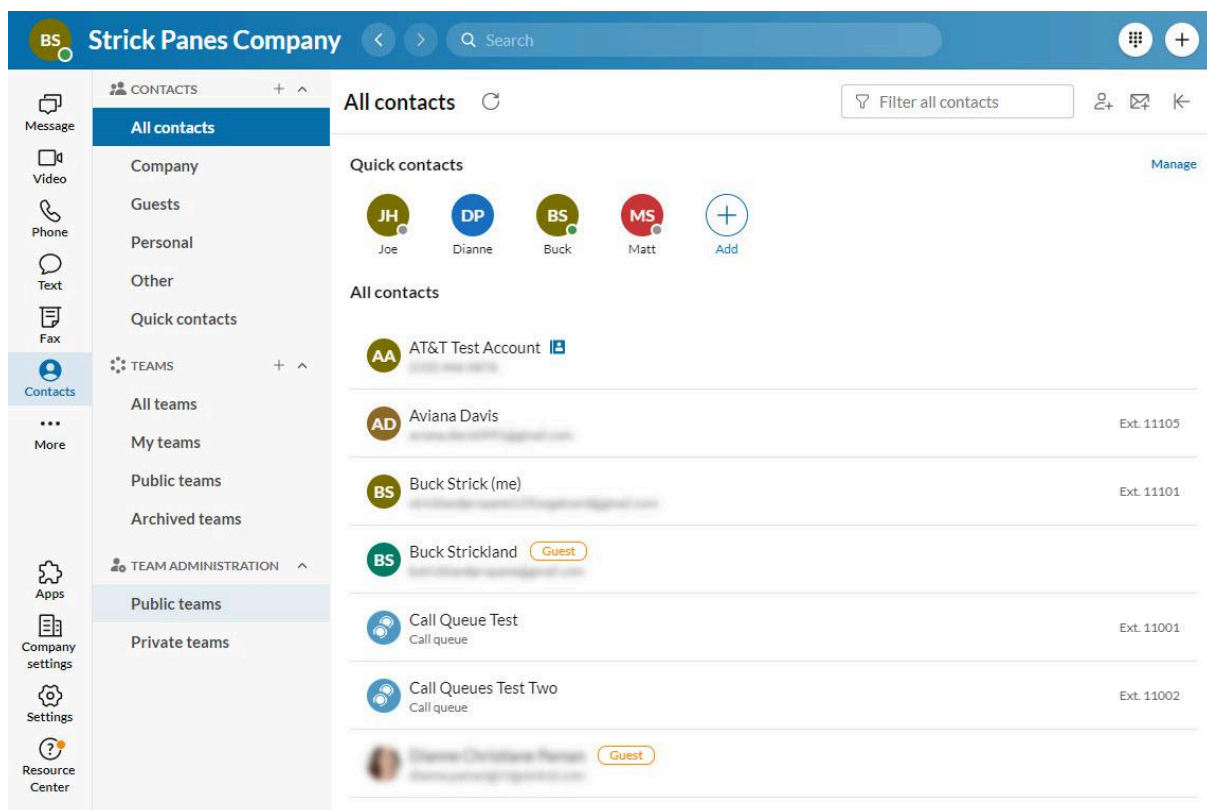
To learn more about what you can do under Phone, visit [Intro to Phone in the RingCentral app](#).



## 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.

RingCentral Support

MyRingCentral Products Community Resources University Contact System Status Login

### RingCentral Downloads

**Work together. From anywhere.**  
Team messaging, video meetings and phone - all in one app.

**Get the new RingCentral app**

[Download for Mac](#) [Download for PC](#)

	Version	Updated	Windows	Mac	Linux	Android	iOS	Web
<b>RingCentral App</b> Desktop, Mobile & Web ⓘ	21.3.10	7/14/21	64-bit (EXE) 64-bit for IT (MSI - Non Auto Update)	<a href="#">Download</a>	-	<a href="#">Download</a>	<a href="#">Download</a>	<a href="#">Open</a>
<i>We've re-built the RingCentral desktop app with faster load time, enhanced searches, and many more improvements! The previous app, now RingCentral Classic, is still available for download. Not sure which RingCentral app you are using? Click <a href="#">here</a> to learn more.</i>								
<b>RingCentral Classic App</b> Desktop & Web ⓘ <i>Retiring soon</i>	20.4.30	12/10/20	64-bit   32-bit 64-bit for IT (MSI)   32-bit for IT (MSI)	<a href="#">Download</a>	-	-	-	<a href="#">Open</a>
<b>Tools to transition to RingCentral Video</b>								
<b>RingCentral Scheduler</b>	21.2.22	6/17/21	<a href="#">Enable</a>	<a href="#">Enable</a>	-	-	-	-

#### Launching the app silently

Once you install the RingCentral app on your Windows computer and open it for the first time, you can right-click the window and select **Launch in background**. The app will open on system start in the background.

## 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**.

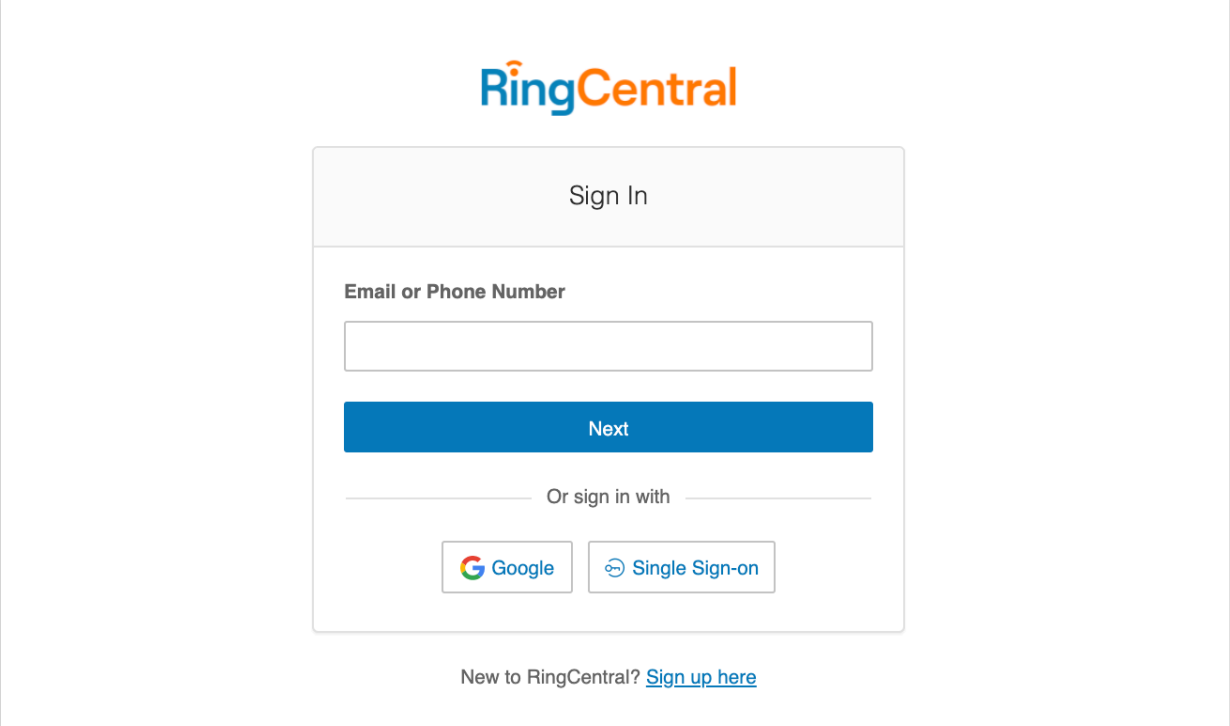
Depending on the chip your Mac has, follow the steps below on downloading and installing the RingCentral desktop app.

## 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.

The image shows the RingCentral Sign In interface. At the top is the RingCentral logo. Below it is a 'Sign In' header. Under the header is a form with a label 'Email or Phone Number' above a text input field. Below the input field is a blue 'Next' button. Under the button is a separator line with the text 'Or sign in with'. Below this are two buttons: 'Google' with the Google logo and 'Single Sign-on' with a circular arrow icon. At the bottom of the form is a link: '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](https://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

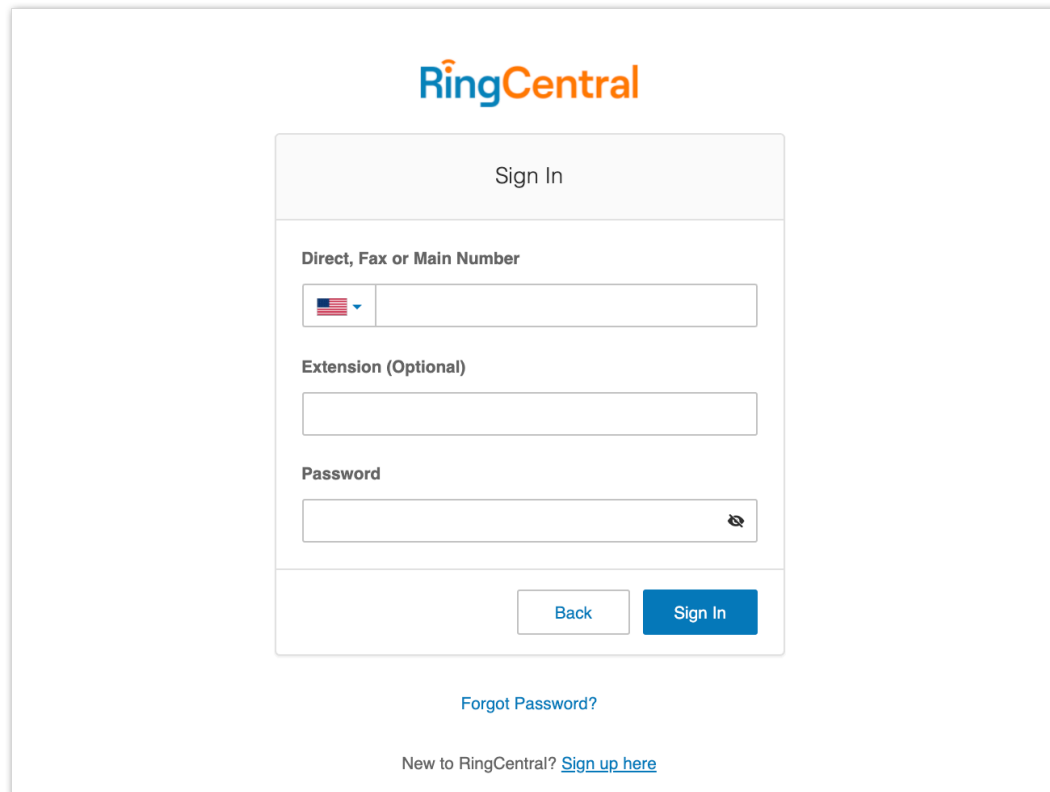
Your login options include:

- 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.




The image shows the RingCentral Sign In form. At the top is the RingCentral logo. Below it is a 'Sign In' header. The form contains three input fields: 'Direct, Fax or Main Number' with a country code dropdown (showing US), 'Extension (Optional)', and 'Password' with a toggle for visibility. At the bottom are 'Back' and 'Sign In' buttons. Below the form are links for 'Forgot Password?' and 'New to RingCentral? Sign up here'.

RingCentral

Sign In

Direct, Fax or Main Number



Extension (Optional)

Password

[Back](#) [Sign In](#)

[Forgot Password?](#)

New to RingCentral? [Sign up here](#)

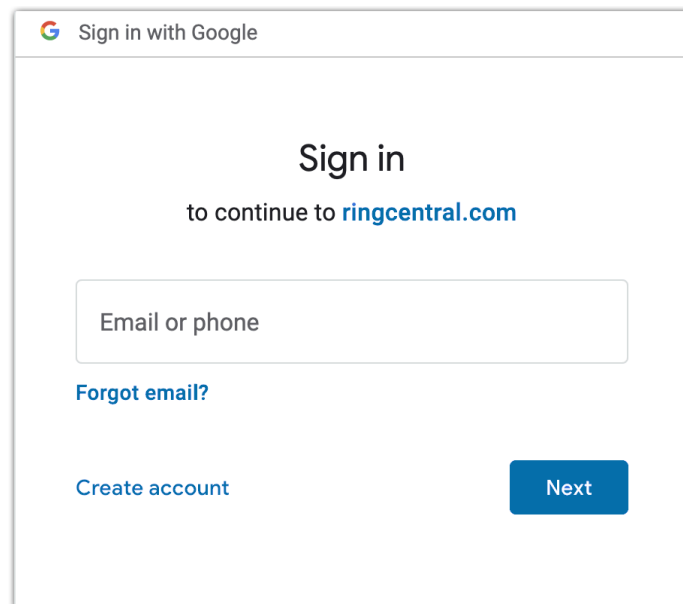
4. Enter your password.
5. Click **Sign in**.

## 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.

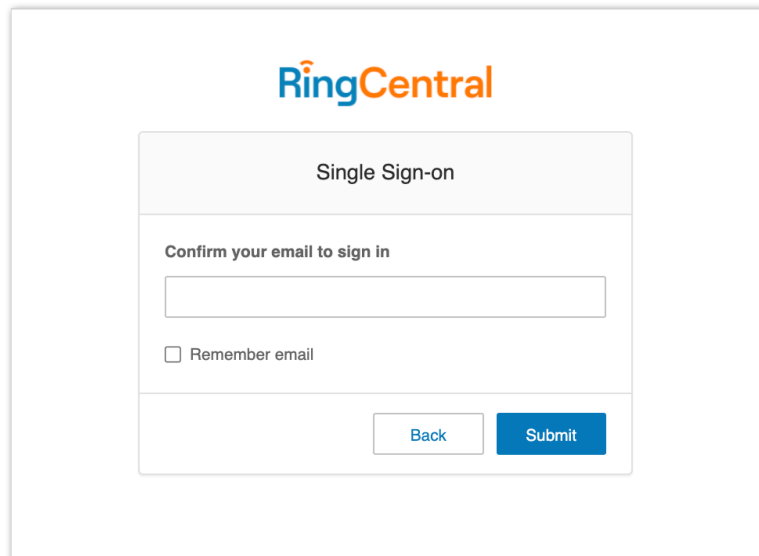
A screenshot of the Google sign-in interface. At the top, it says "Sign in with Google" with the Google logo. Below that, it says "Sign in to continue to ringcentral.com". There is a text input field labeled "Email or phone". Below the field, there is a link "Forgot email?". At the bottom left, there is a link "Create account". At the bottom right, there is a blue button labeled "Next".

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.

A screenshot of the RingCentral Single Sign-on page. At the top is the RingCentral logo. Below it is a form titled "Single Sign-on". Inside the form, there is a section titled "Confirm your email to sign in" with a text input field. Below the input field is a checkbox labeled "Remember email". At the bottom of the form are two buttons: "Back" and "Submit".

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

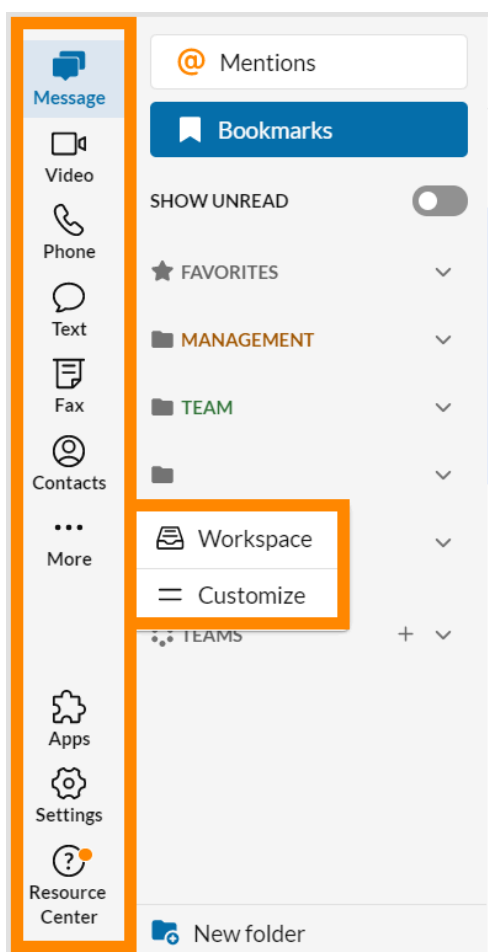
## Navigating the RingCentral app for web and desktop

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:

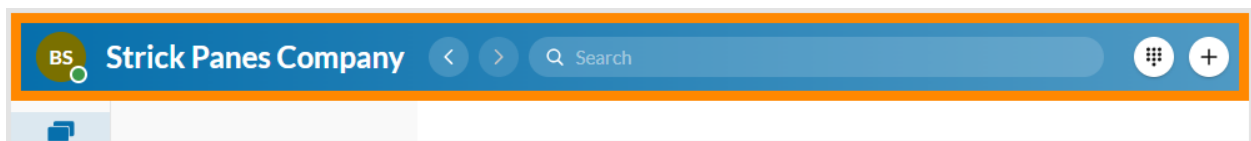


- **Message:** Send and receive messages, create and collaborate in teams, share files, and create tasks.
- **Video:** Start, schedule, and join meetings, manage recordings, and view upcoming meetings.
- **Phone:** Make and receive phone calls, send and receive text messages, manage your call history, and listen to your voicemails.
- **Contacts:** 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 [Google personal contacts](#) and connect your Office 365 account [here](#).
- **Tasks and more:** Add, view, and manage your tasks, events, files, and notes
- **Analytics:** Only available as an administrator; select the bar graph icon to navigate to the RingCentral RingEX analytics portal.
- **Apps:** Integrate third-party apps from the RingCentral App Gallery to receive custom notifications and alerts.
- **Settings:** 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 dialpad 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 meeting](#): 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*.
  - **Forward all calls**: Enable to forward all incoming calls to a voicemail, coworker, external number, call queue, announcement, IVR menu, or other locations.
  - **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
  - **Manage account**: Only available to admins; this opens the RingCentral online account, so you can manage your settings
  - **Sign out**: Select Sign out to log out of the RingCentral app





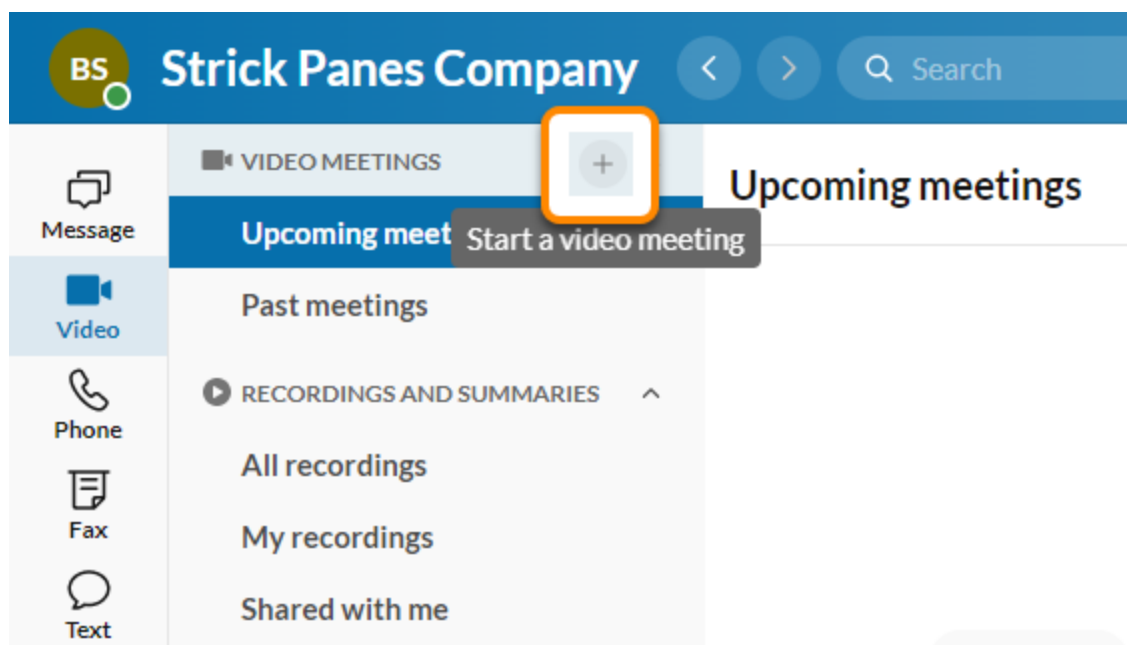
## Left pane

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.

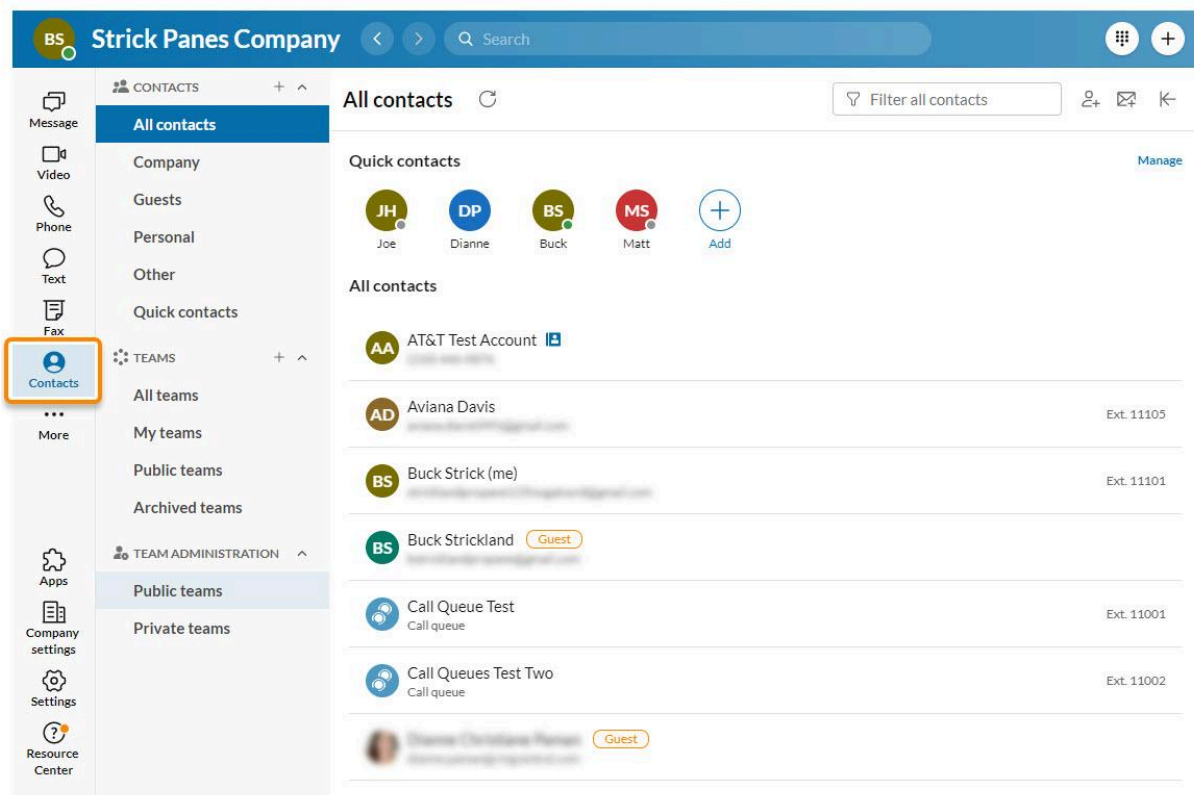
For example, in **Message**, the center pane is your message thread containing the history of a particular conversation. In **Video**, if you're on the Upcoming meetings page, this page will contain a list of scheduled meetings for the day as well as action buttons to start, schedule, or join a meeting.

## 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.



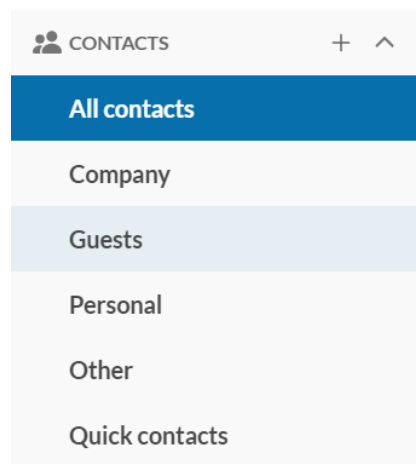
## Left pane

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

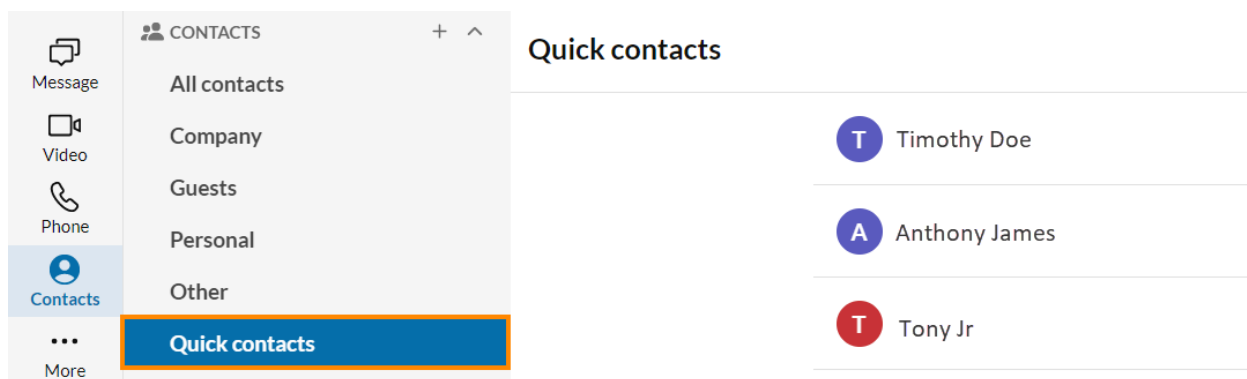
The **Contacts** section in the left pane contains the following tabs:

- **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.

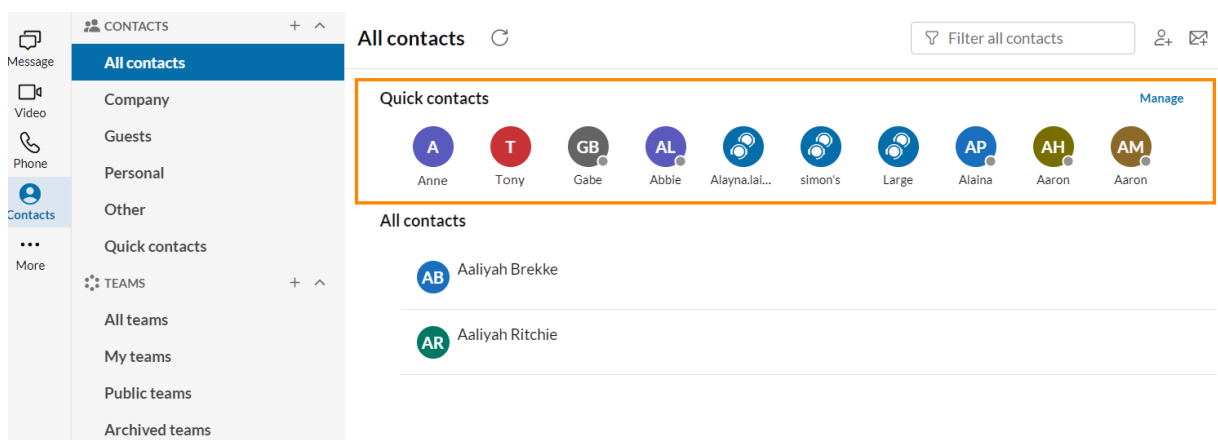


## Quick contacts

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**.

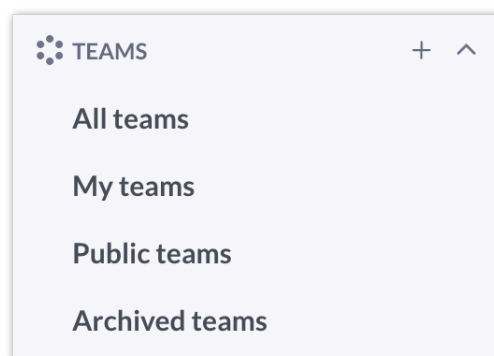


To learn more about what you can do under Contacts, visit [Intro to users in the RingCentral app](#).

## Teams

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

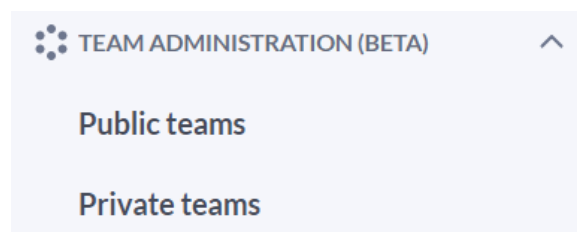
- **All teams:** All teams that have been created in your company's account, with the exception of private teams of which you're not a member
- **My teams:** Teams that you have either created or joined
- **Public teams:** Teams that are public — that is, teams that you can join without an invite
- **Archived 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



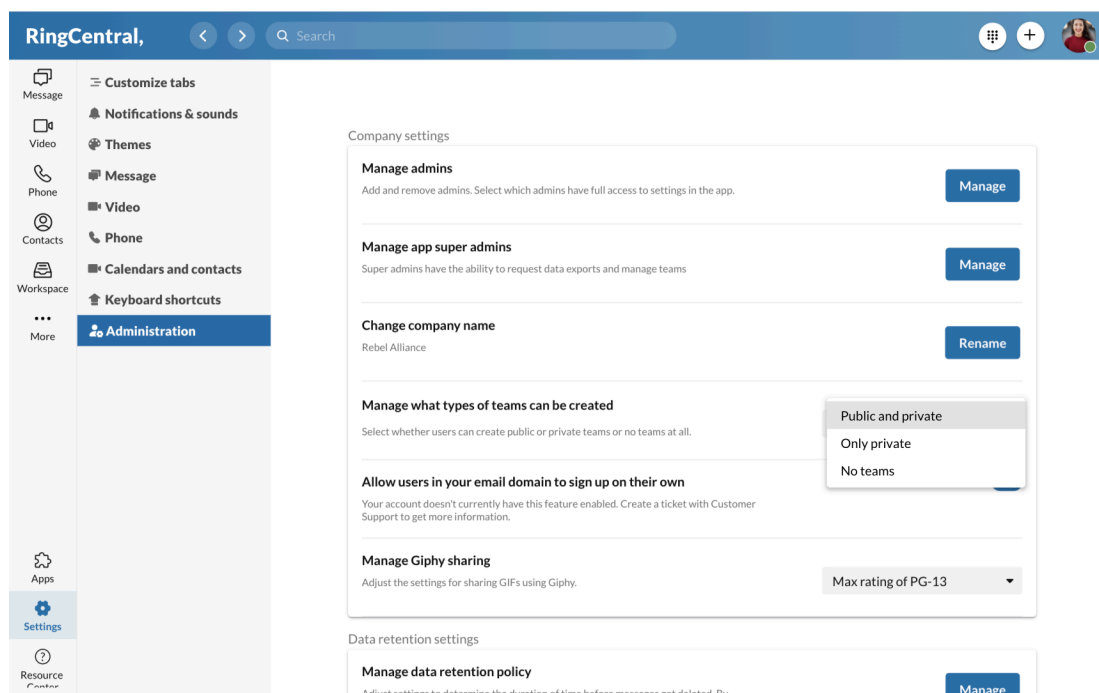
## Team Administration

**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.



Admins can also choose what types of team users can create or convert a team/group conversation into.



## Configuring notifications and audio

You can [select the type of notifications and sounds](#) you want to receive for new messages, during incoming calls, and for voice and video calls. You can also set reminder notifications for scheduled events.

Any changes you make to your settings in the RingCentral desktop and web app will also be applied to your RingCentral mobile app. You'll need to update your notifications and sounds for the RingCentral Phone app separately.

You can also use the [Admin Portal to configure email and text message notifications](#), and if you're an admin, you can update other users' preferences.

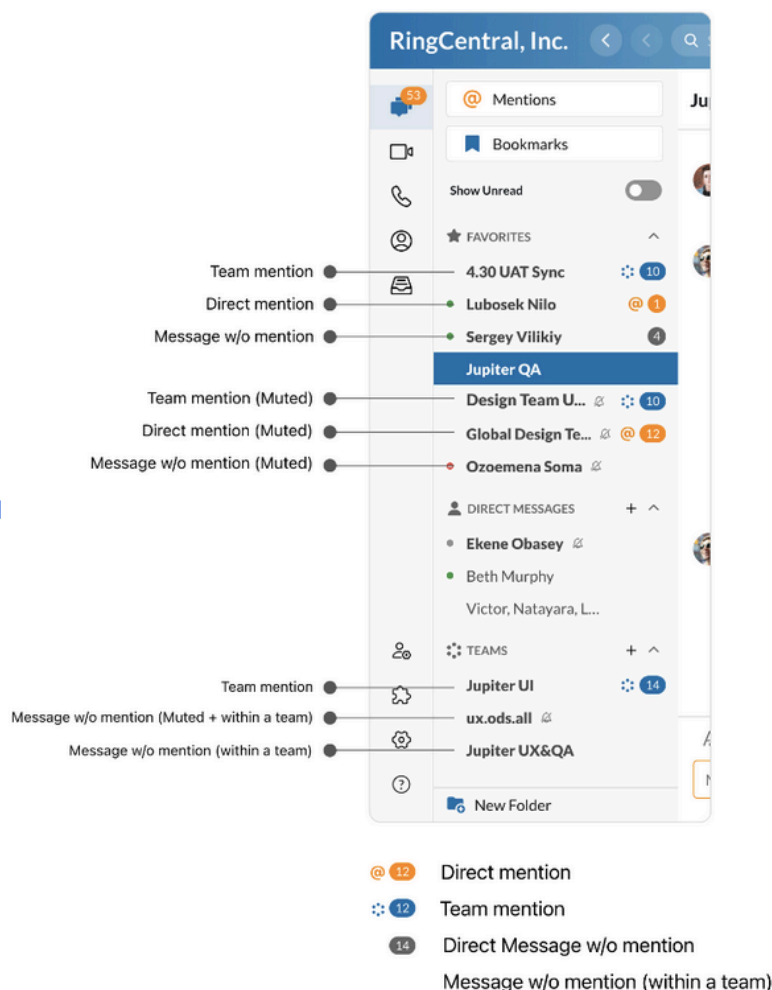
To access your **Notifications and audio** settings, go to **Settings > Notifications and audio**.

## Notifications

Choose when and how you'd like to be notified for messages, calls, voicemails, and meetings.

- **Browser notifications:** Receive notifications within your web browser. This is only available in the RingCentral web app.
- **New messages:** Select the type of messages you'd like to receive notifications for:
  - *All new messages:* Receive notifications for all new messages.
  - *Direct messages and mentions:* Receive notifications for direct messages and @mentions only.
  - *Off:* Receive no notifications.

- Note: Notifications for direct messages, direct mentions, and team mentions differ in the Message window display. Direct mentions will display in orange, team mentions in blue, and new direct messages in gray.



- **Incoming calls:** Receive notifications for incoming calls.
- **Missed calls and new voicemails:** Receive notifications for missed calls and new voicemails.
- **Bounce or Flash app icon:** Bounce (Mac) or flash (Windows) the app icon in your dock or start bar when you receive a notification. You can choose from *continuously*, *once*, or *off*. This feature is only available in the RingCentral desktop app.
- **Always show notifications when the app is in the foreground:** Receive notifications even when the app is in the foreground and in use. Note: New users still need to turn on desktop notifications first to see the desktop notifications even when the app is in the foreground.
- **Upcoming meeting reminder:** Choose how long before the start of a meeting you'd like to be notified. You can choose from *Don't notify me*, *When meeting starts* (default), or 1-15 minutes before a meeting begins.

You can also configure your [notification preferences for specific direct, group, or team conversations](#).

**Note:** If you're using the RingCentral app on Chrome, Firefox, or Safari, make sure you turn on notifications in your browser settings as well. If you have notifications turned off in your web browser, go to your browser settings and either allow any site to show desktop notifications or allow sites to ask for permission to show notifications.

## Audio

Select the notification sound you want to hear for each type of message, meeting, and call you receive by clicking the dropdown at the far right of each setting. You can click the **Play** icon next to the name of each sound to preview it.

You can select a sound for each of these notifications:

- Direct messages
- Mentions
- Team messages
- Ringtone for incoming calls
- Incoming video calls
- Text messages
- Faxes

## Email notifications

Choose how you'd like to receive email notifications for different types of messages.

- **Direct messages:** Change how often you receive email notifications for direct messages. Choose from Every 15 minutes, Every hour, or Off.
- **Mentions:** Turn email notifications on or off for @mentions of your name. This category doesn't include @team mentions.
- **Teams:** Change how often you receive email notifications for teams that aren't muted. Choose from Every 15 minutes, Every hour, or Off.
- **Texts:** Turn off/on email notifications for SMS text messages

## Audio sources

Select the devices you'll use for sending and receiving audio. You can use your headset, microphone, or speakers during calls or meetings.

- **Microphone source:** The source of your audio input, such as your default computer microphone or a stand-alone microphone.
- **Speaker source:** The source of your audio output, such as your headphones or computer speakers.
- **Ringer source:** Choose where you want to hear the audio for an incoming call.
- **Volume control:** Adjust the volume of the RingCentral app on your desktop or web browser. This setting operates independently from your computer's volume settings.



Note: If the audio sources for your microphone and speakers are different, you may experience a loss in sound quality.

## Headset support

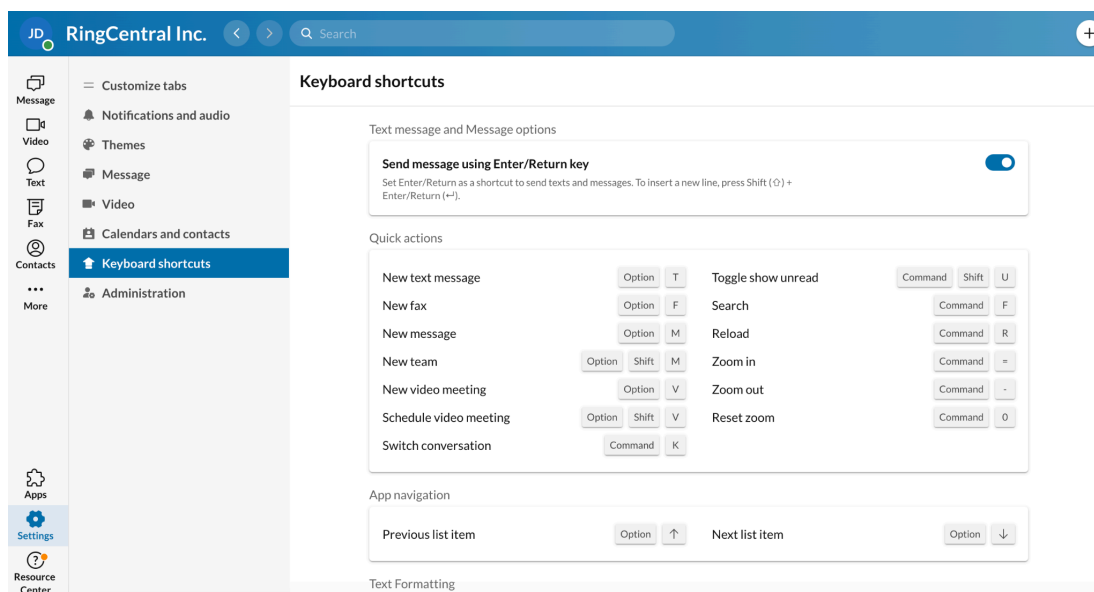
You can [set up a headset to use for calls](#). If you have a headset connected, you can turn on Headset controls to use your headset's call control buttons to answer and end calls.

## 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

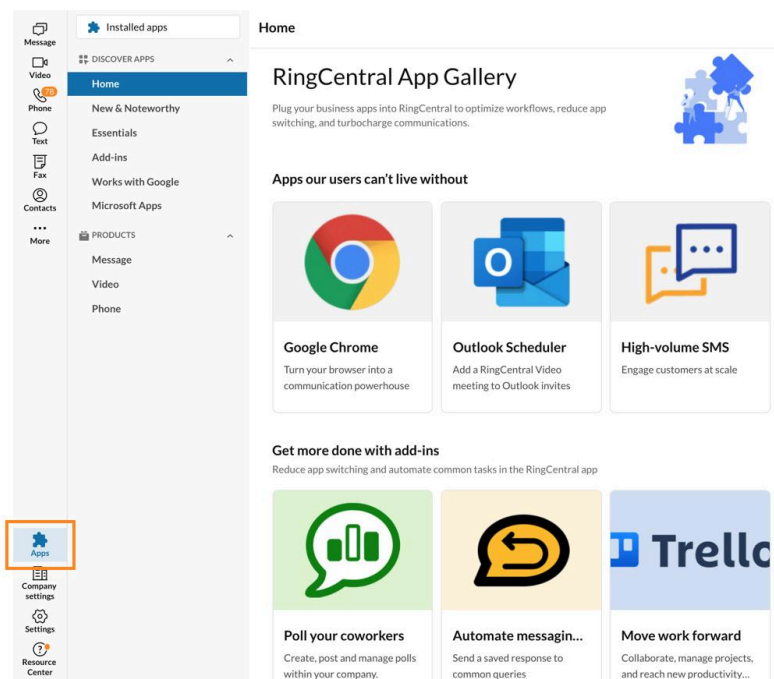
Click **Settings** at the bottom left of the left-hand navigation bar, and then select the **Keyboard shortcuts** tab in the left pane.



[See this article](#) for the list of shortcuts that will appear on the keyboard shortcuts settings page.

## Navigating the Apps interface

The Apps tab in the RingCentral desktop app enhances discovery and installation of add-ins, bots and other integrations. The new design mirrors the content that can be found on our external App Gallery website. You can get to the app gallery by clicking on the puzzle piece in the left navigation bar.



The app integrations interface is divided into two sections:

- The left pane contains your main navigation tabs.
- The right pane contains the different apps related per tab.

## Left pane

The left pane in the Apps interface shows the main navigation tabs:

- **Installed apps:** Select this tab to display all the apps that are integrated in your RingCentral app.
- **Discover apps:** Select this tab to discover different app types you can add.
- **Products:** Select this tab to view a list of apps that you can integrate into Message, Video, or Phone.

## Discover apps

Going to the Discover apps tab to browse collections of apps and integrations. These will change over time as RingCentral updates its apps and integrations offerings. Here are some topic areas you may find:

- **Home:** Displays all the apps you can use with RingCentral.
- **New & Noteworthy:** Shows recently added apps.
- **Essentials:** Shows the most popular apps that you can integrate with RingCentral.
- **Add-ins:** Discover add-ins that enhance your team messaging experience and help you get more work done without leaving the app. Add-ins integrate functionality directly into a RingCentral client, such as Team Messaging and Video.
- **Works with Google:** Shows the Google apps that work with RingCentral.

- **Microsoft Apps:** Shows the Microsoft apps you can use together with RingCentral.

## Right pane

Lists all available apps accessible when you click on any tabs in the left pane. You will see the related information for each app or collection you click. You can also easily install or be redirected to the app store to download.

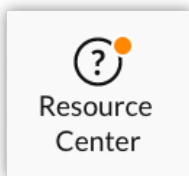
Visit [Setting up app integrations in the RingCentral app](#) to learn more about adding an app.

## 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 and new features.
- Browse all RingCentral app features.
- Share feature ideas and report issues.

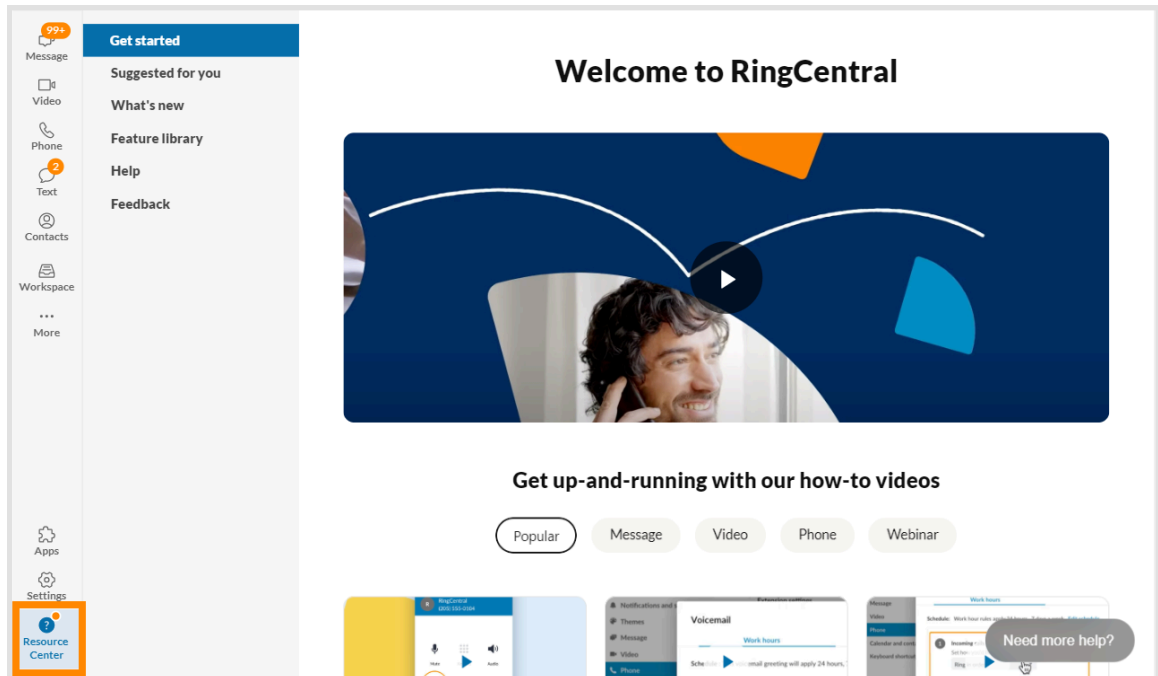
Note: You will see an orange alert bubble in the Resource Center icon if there is new content or an added feature that you may want to view.



## Accessing the Resource Center

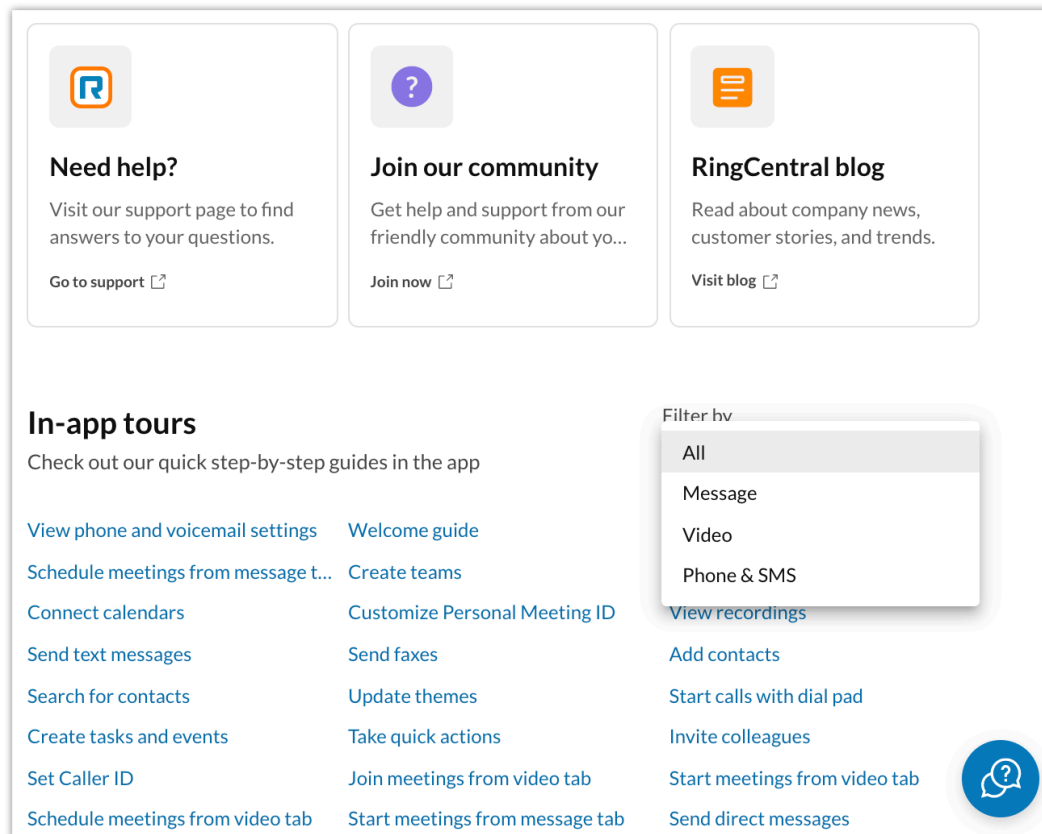
You can access the Resource Center from the left navigation bar. You will find the different [Resource Center](#) tabs, including Get started, Suggested for you, What's new, Feature library, Help, and Feedback.

You can click the Need help? button at the bottom right of the Resource Center tabs to access Search for your question, Report a bug, Get app info quick links. You can also access the AI-powered chatbot and ask questions about your online account or the RingCentral app.



## Resource Center tabs

- **Get started:** Watch how-to videos and explore the most popular features of the RingCentral app. Note that some videos may be unavailable depending on your language and region.
- **Suggested for you:** Learn about the RingCentral desktop and web app's recommended and beta features.
- **What's new:** Read release notes and stay up to date with the latest features, improvements, and bug fixes for the RingCentral desktop and web app.
- **Feature library:** Browse all RingCentral app features and read related documentation.
- **Help:** Get help by using the following:
  - **Search topics and questions:** Type questions or topics directly in the search bar.
  - **Popular topics:** Click one of the topics to access information related to that topic.
  - **Filter by:** Filter related topics by using one of the following: All, Message, Video, or Phone & SMS.



- **Feedback:** Submit your feedback, encountered issues, feature improvement ideas, and new feature requests. [Learn more about submitting feedback](#)

## Searching for a user, conversation, or setting

Use the search field in the top bar of the RingCentral desktop and web app to look for any of the following:

- Conversations (chat and text)
- Contacts
- Settings related to:
  - Message
  - Video
  - Phone notifications
  - Connected accounts
  - Themes
  - Data and storage

Users can utilize the search field like a search engine and find the settings you want to modify in the app.

[Learn more about using the search field.](#)

## 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.

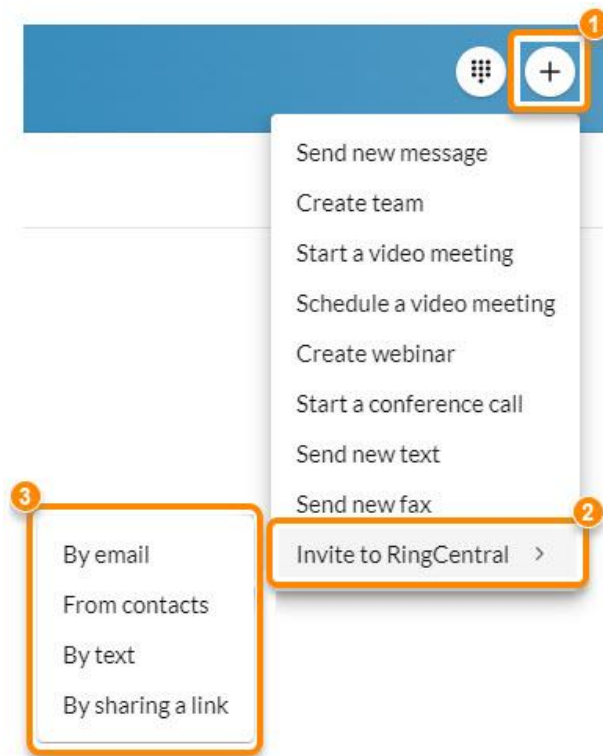
There are multiple ways that you can add a new user to your company account, including:

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

## 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.



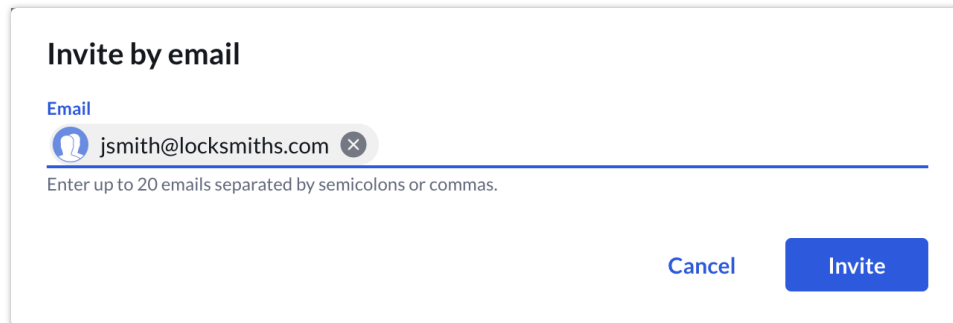
4. Configure the appropriate settings based on the option you selected in step 3.

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

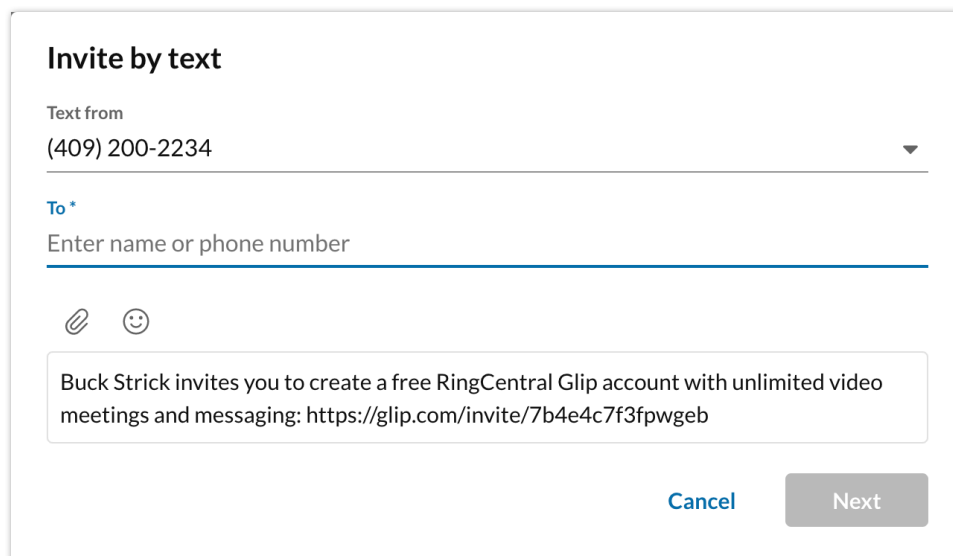
1. Enter a semicolon- or comma-separated list of email addresses (max. is 20 emails).
2. Select Invite to send an email invitation to each email address.



The 'Invite by email' dialog box has a title bar 'Invite by email'. Below it is a label 'Email' in blue. A text input field contains 'jsmith@locksmiths.com' with a blue user icon on the left and a close button (X) on the right. Below the input field is a hint text: 'Enter up to 20 emails separated by semicolons or commas.' At the bottom right are two buttons: 'Cancel' and 'Invite' (which is highlighted in blue).

## 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.

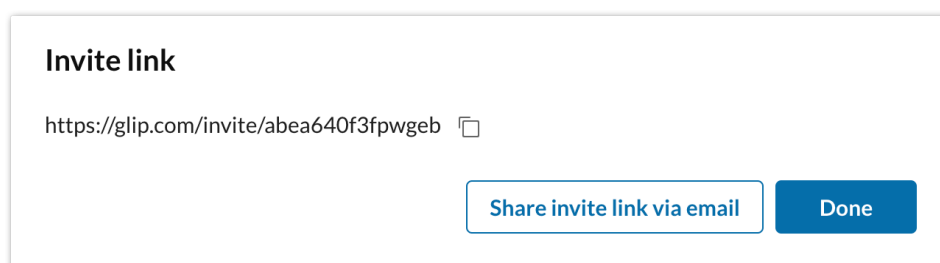


The 'Invite by text' dialog box has a title bar 'Invite by text'. Below it is a 'Text from' section with the value '(409) 200-2234' and a dropdown arrow. Below that is a 'To \*' section with a text input field containing the placeholder 'Enter name or phone number'. Below the input field are two icons: a paperclip and a smiley face. Below the icons is a text area containing the message: 'Buck Strick invites you to create a free RingCentral Glip account with unlimited video meetings and messaging: <https://glip.com/invite/7b4e4c7f3fpwgeb>'. At the bottom right are two buttons: 'Cancel' and 'Next' (which is highlighted in grey).

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

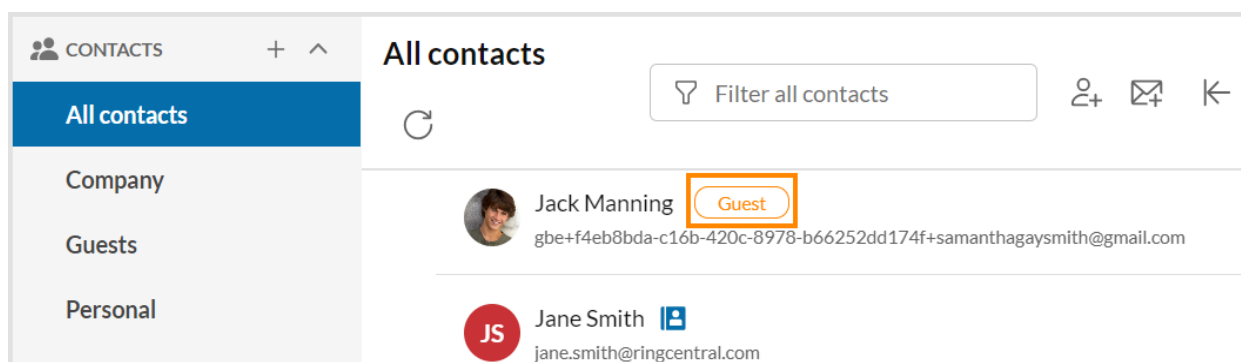
1. Share the link in one of two ways
  - a. Click the Share invite link via the email button.
    - i. Enter a list of email addresses you'd like to send the invitation line to via the default email app that opens
    - ii. Send the email
  - b. Select the Copy paper icon to copy the link
    - i. Send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



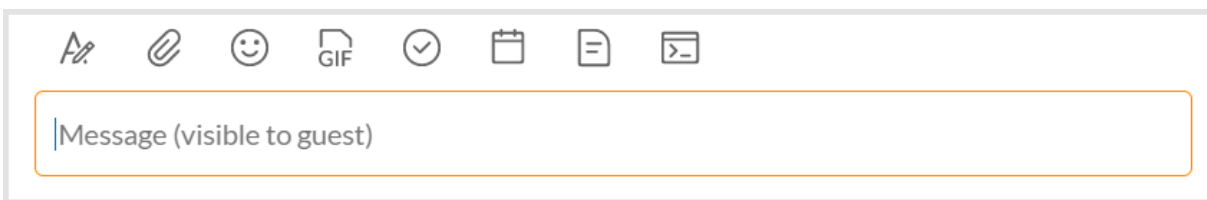
## Managing guests

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.

Guests are indicated with a guest pill in your Contacts list, and they're added once they're invited to create a RingCentral account. In a conversation, there's a guest section on the right pane where you can see members of that conversation who are invited as guests.

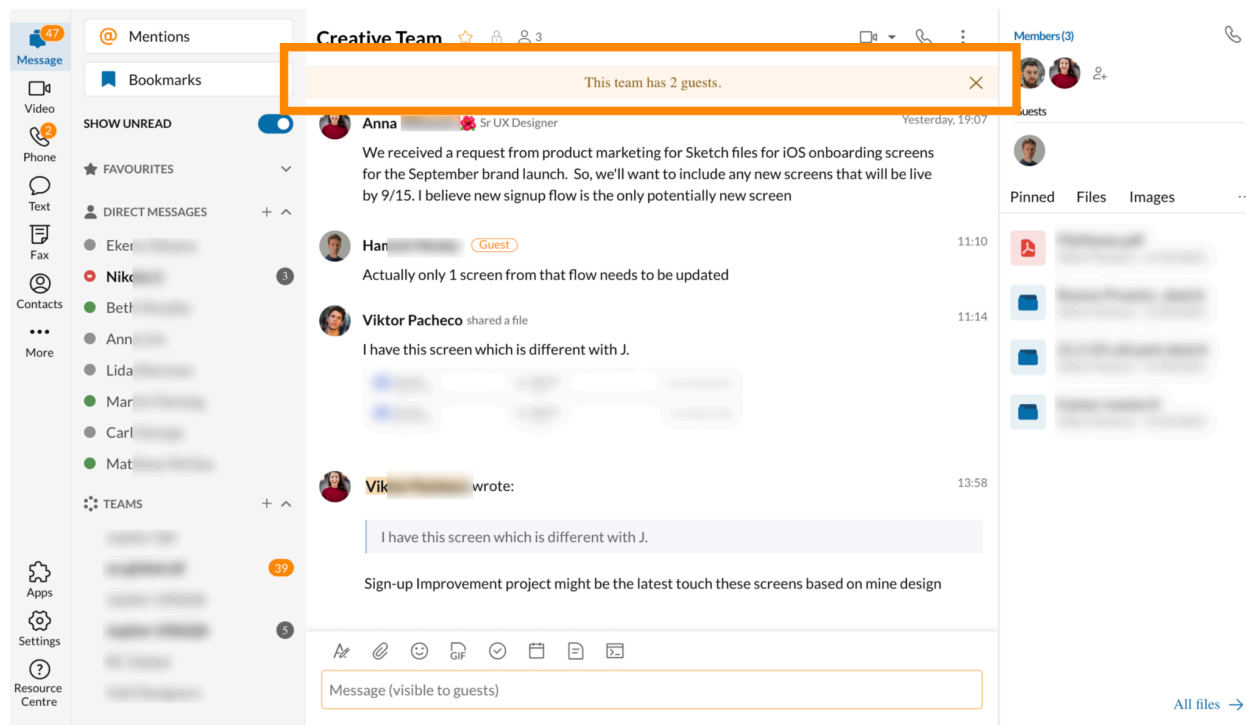


In a message thread with guests, you will see ghost text indicating that there are guests in the conversation. The ghost text disappears after you type in the field.



- In a direct message, group conversation, or teams with one guest, the ghost text is Message (visible to guest).
- In a group conversation or teams with more than one guest, the ghost text is Message (visible to guests).
- If you're a guest in a conversation, the ghost text says Message (visible to external user) or Message (visible external users).

When a guest or several guests are members of a conversation, it will be indicated by a guest banner at the top of the conversation or team. Note that clicking the x close button on the guest banner will close it permanently.

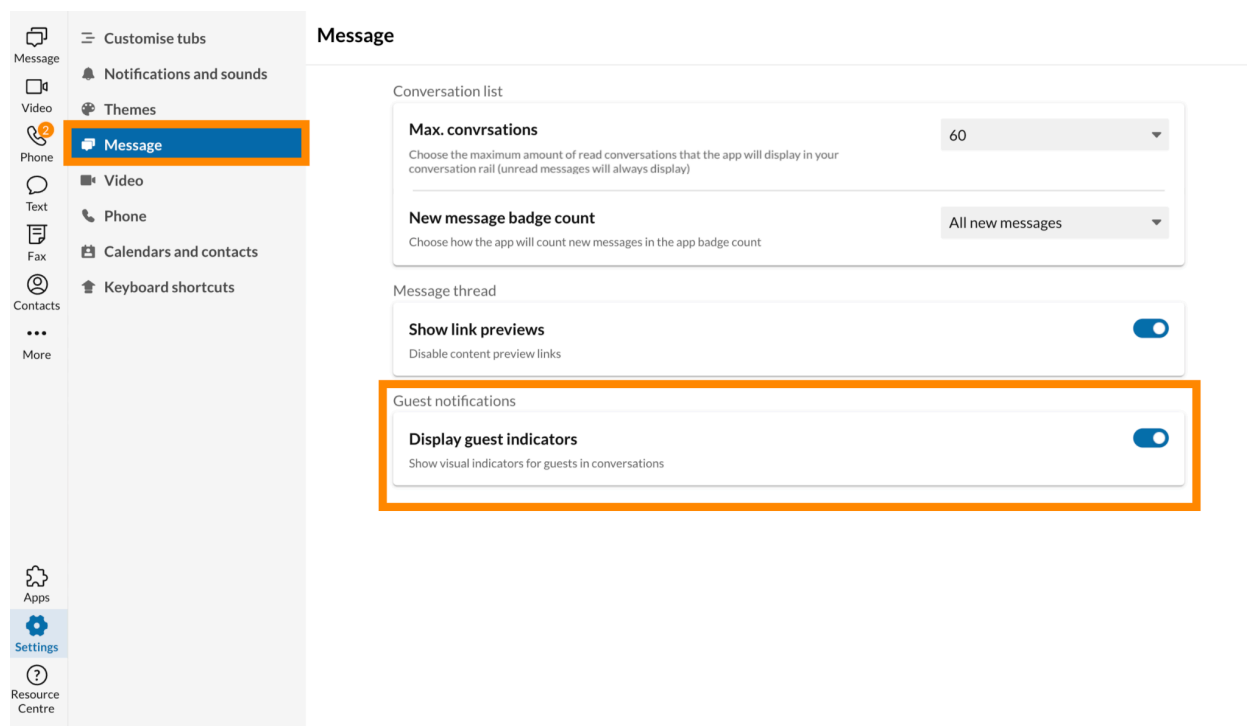


If you're an admin on your RingCentral account, you can block unwanted guests from the Contacts page and the guest profile. This security feature will prevent guests from communicating with your users.

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.](#)

## Managing the guest badge

You can turn off the guest badge display in certain places by going to **Settings > Message** and turning off the toggle for Display guest indicators under the Guest notifications section. [Learn more](#)



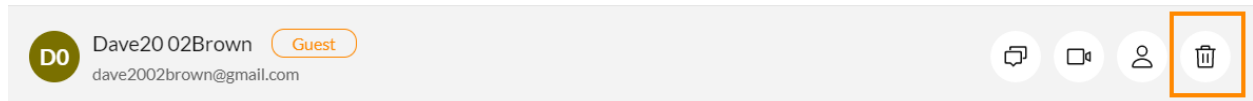
## Configuring external guest settings

External guest settings allow RingCentral app admins to allow or block new messages from external guests and manage the external company domains and personal email addresses that are allowed to initiate conversations with company users.

1. Go to **Settings** via the left navigation bar.
2. Click the **Administration** tab in the left pane.
3. Under **External guest settings**, toggle the **External guest communications** setting on or off to control whether guests are allowed to start conversations with your coworkers.
4. Click **Manage** at the far right of **Domain allow/block list** to manage which external company domains and personal email addresses have permission to initiate conversations with your users.

## Blocking guests from the Contacts page

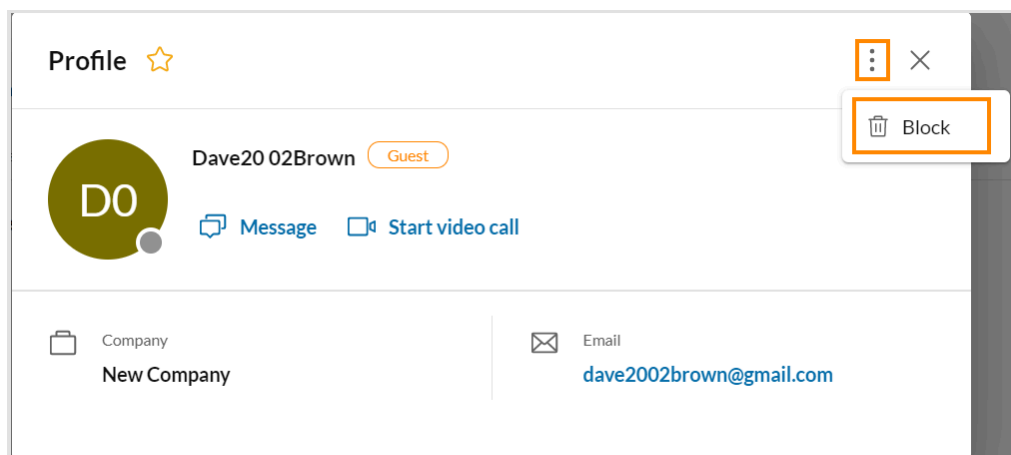
1. Go to **Contacts** from the left navigation bar.
2. Click **Guests** on the left pane.
3. Search for the guest that you'd like to block or browse through the list of your guest contacts.
4. Hover over the guest user and click on the **Block** trash can icon at far right. Note that you may have to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



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**.



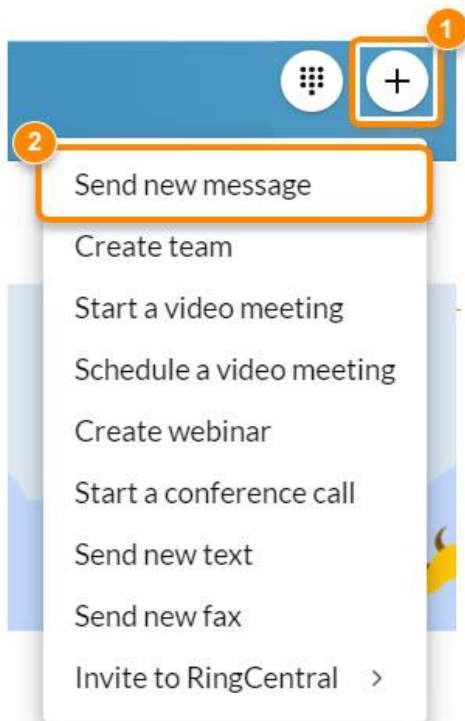
3. Click **Block**.

## Using RingCentral Message

### Sending a message

One way you can send a message is by using the **New actions (+)** button. When you send a message this way, you can start a new conversation with one person 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 one or more names or email addresses under **Members**. Separate multiple names or email addresses with commas or semicolons.
4. Type 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.

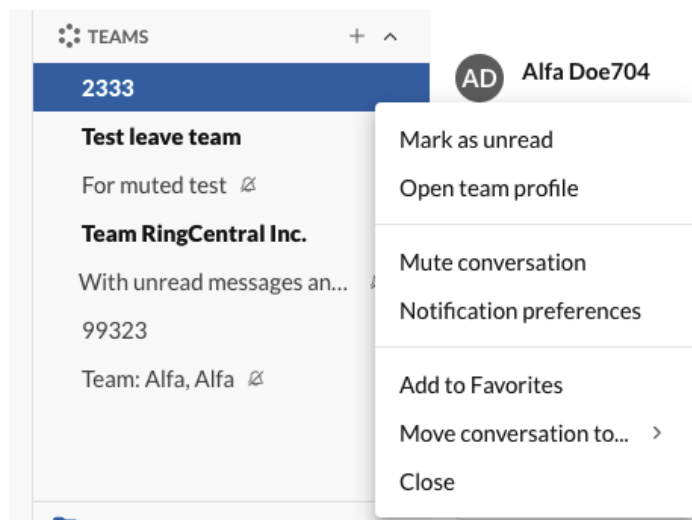
Note: If you add more members to a group conversation, be aware that it will create a new group conversation rather than simply keeping the original conversation.

There are several other methods you can use to send a message. To learn more, visit [Sending a message in the RingCentral app for desktop and web](#).

## Muting a conversation

If you have a lot of conversations going on, you can mute some to avoid constant notifications.

1. Click on the conversation.
2. Click the **More** (three horizontal dots) button.
3. Select **Mute conversation**.



## 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.

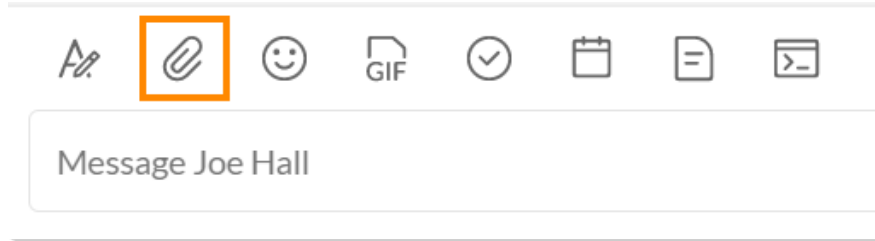
The processes for attaching a file from your computer, Google Drive, OneDrive/SharePoint, or Dropbox are a little different, so let's review each of these methods separately.

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. Click the **Attach file** paperclip icon above the message field, then select *Computer*.

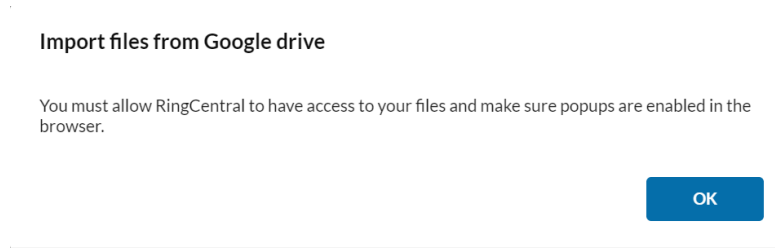


3. Locate and select the files you want to add, then click **Open** to attach to the message.
4. Once you're ready to send, press Enter on your keyboard or click the **Send** icon to send your message.

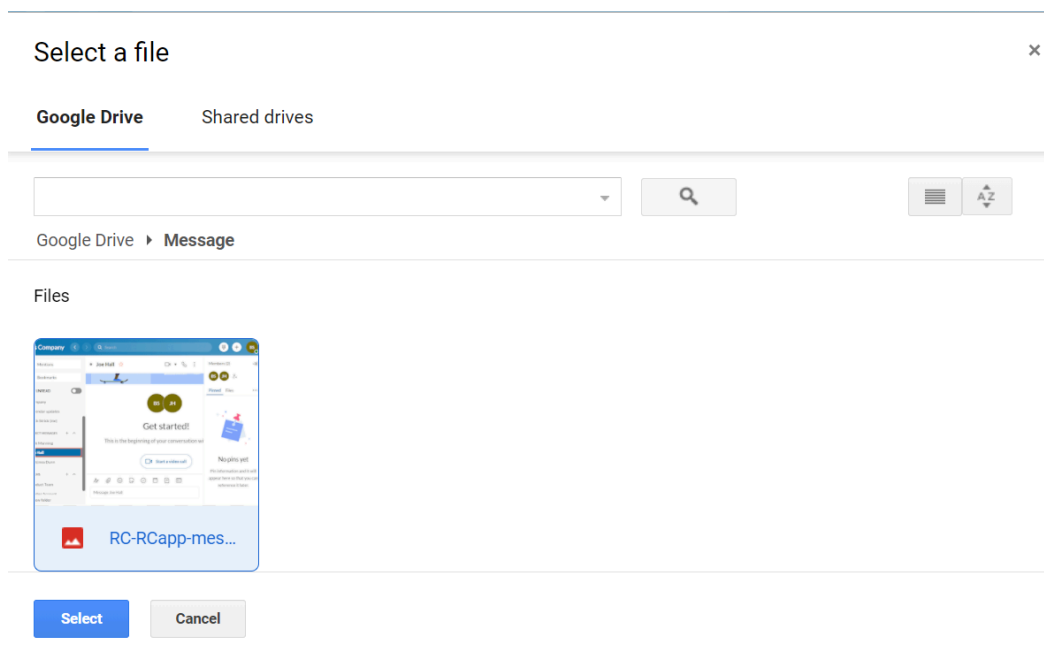


## Attaching a file from Google Drive

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.



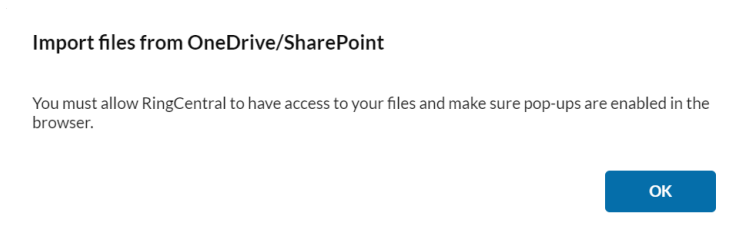
5. Choose the Google account from which you'd like to import your files.
6. Sign in to your Google account.
7. If this is your first time importing files from Google Drive, you will be prompted to give RingCentral permission to access your Google account. Click **Allow** to continue.
8. Locate and click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



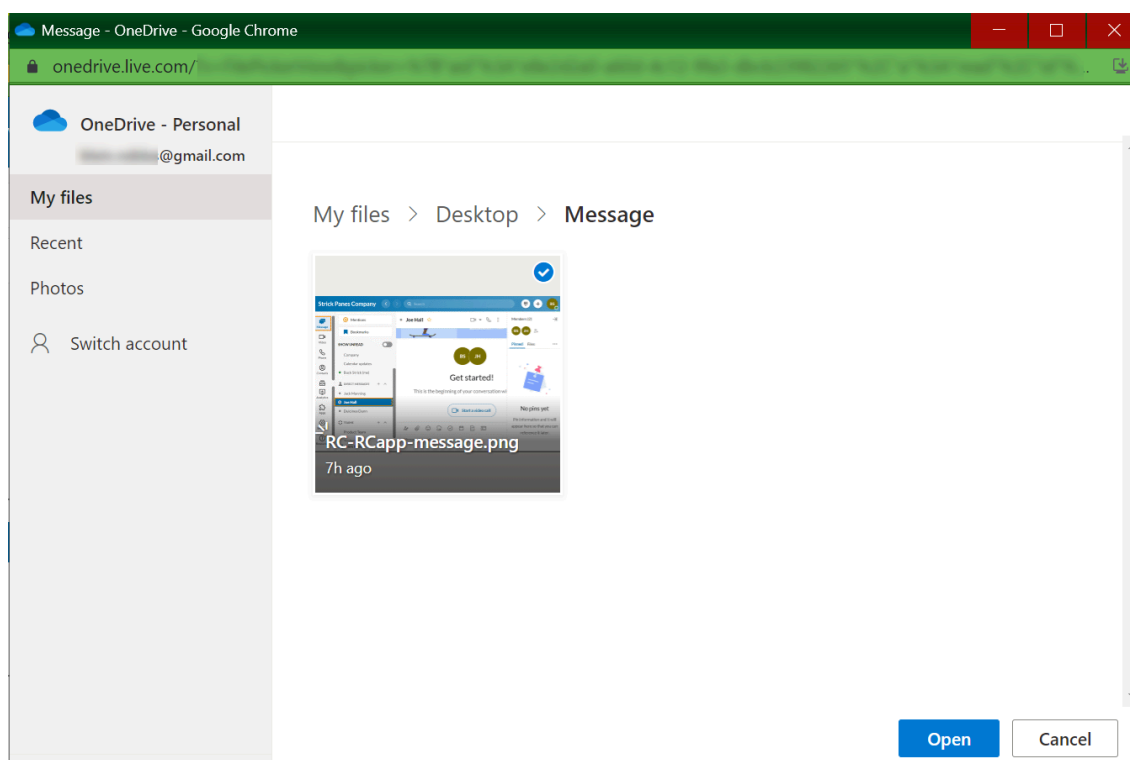
9. Click **Select** to attach the file(s).
10. Once you're ready to send your message, press **Enter** on your keyboard or click the **Send** icon.

## 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.



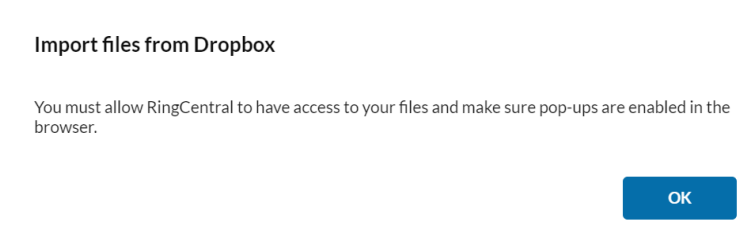
5. Log in to your Microsoft account that you created for OneDrive/SharePoint.
6. If this is your first time importing files from OneDrive/SharePoint, you will be prompted to give RingCentral permission to access your Microsoft account. Click **Yes** to continue.
7. Locate, select, and open the file(s)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



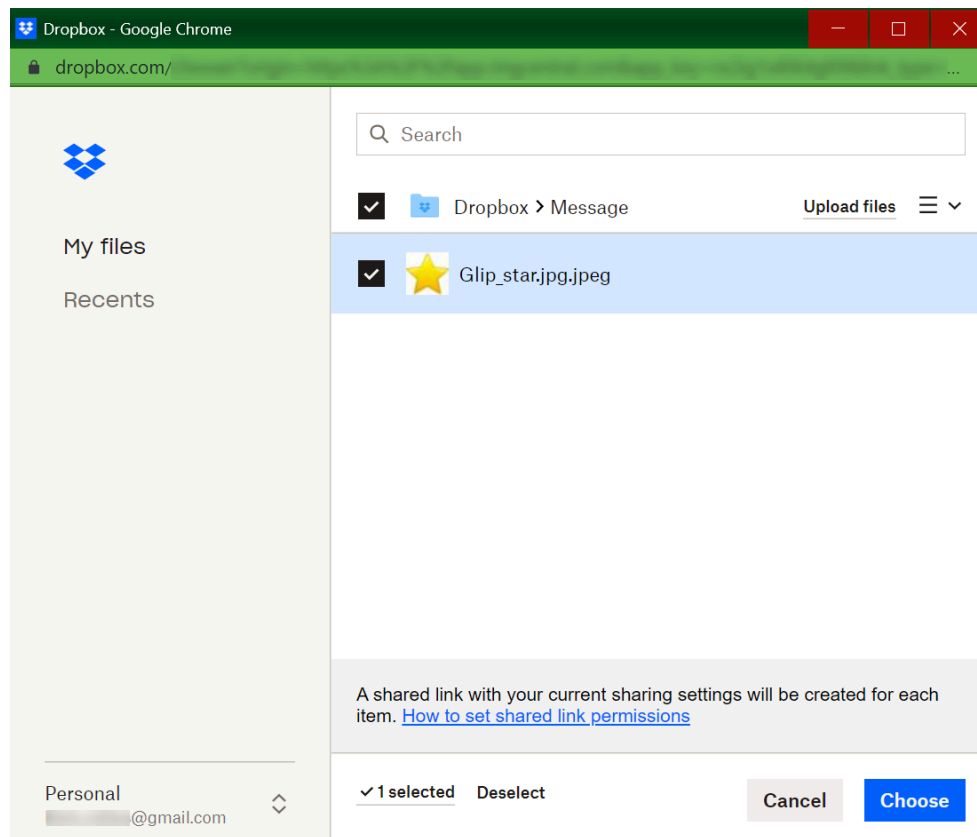
8. Click **Open** to attach the file(s).
9. Once you're ready to send your message, press **Enter** on your keyboard or click the **Send** icon.

## 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.



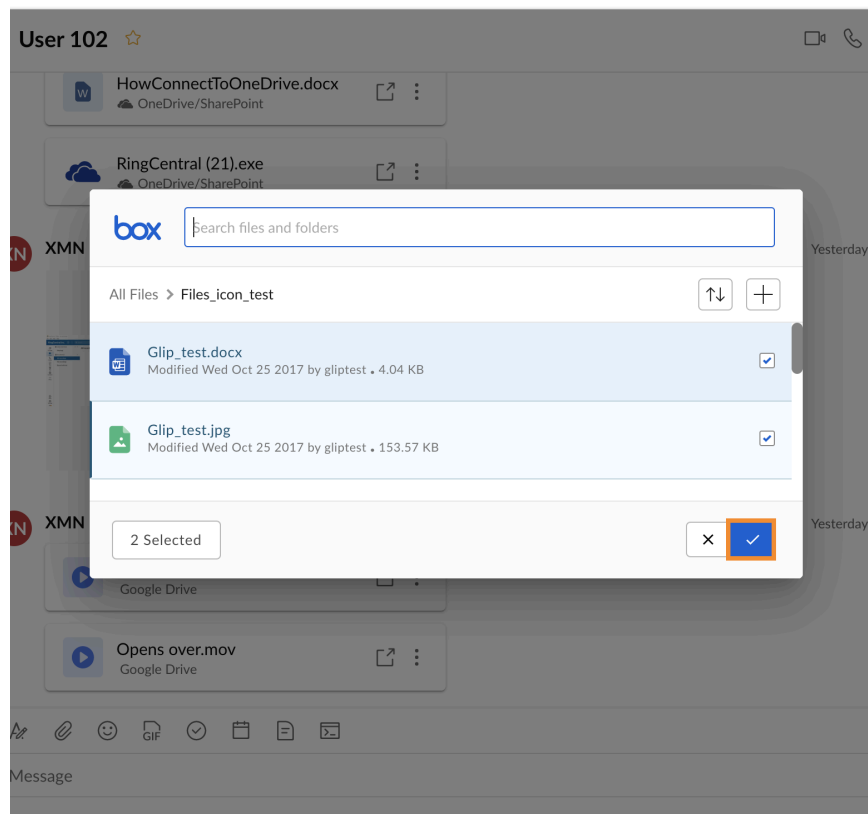
5. Sign in to your Dropbox account using Google, Apple, or your email address.
6. Locate and click the file(s) from Dropbox that you want to attach to the message.



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.

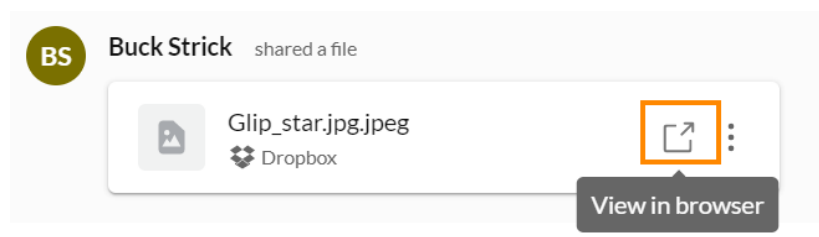
## Attaching a file from Box

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.

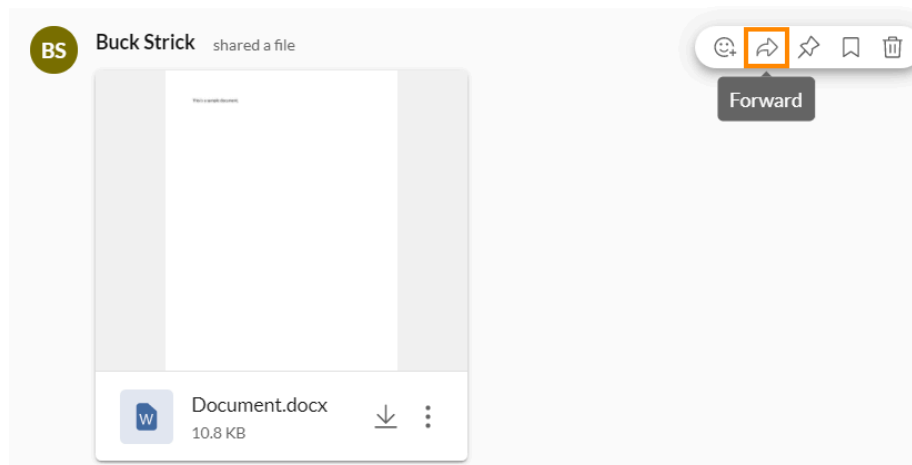
If the post was forwarded from a group conversation, the group conversation's name will not be displayed and will only show as a direct conversation.

### Supported type of messages

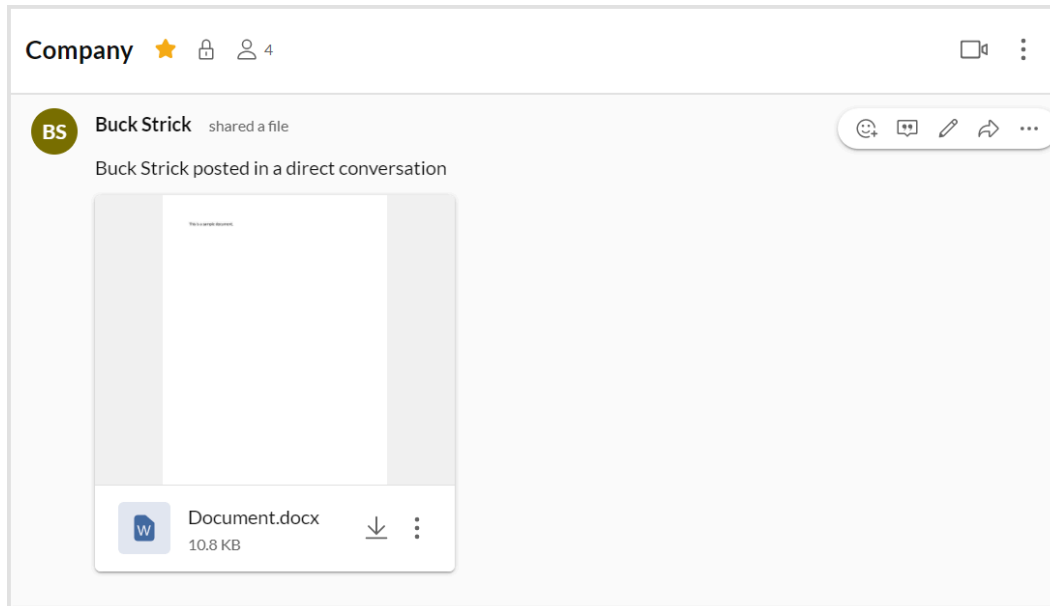
- Text only post
- Text + file(s) post
- File(s) only post

### 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.
5. Click the conversation you want to forward the message to. Any messages or files are also forwarded to the chosen conversation.



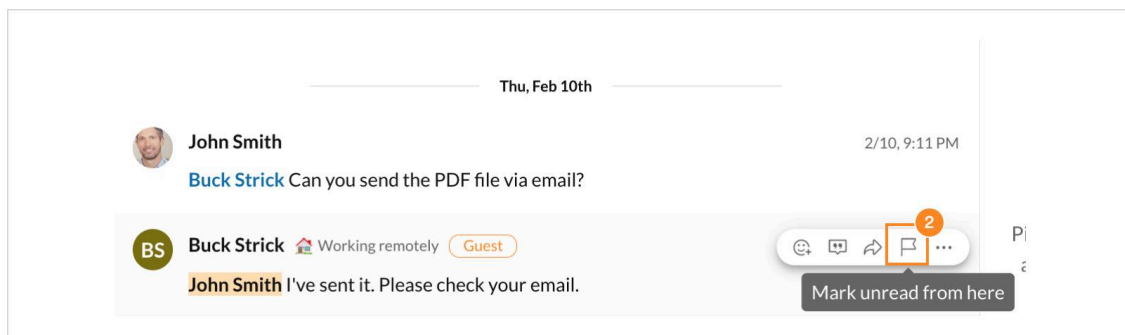
## Marking a message as unread

You can mark a message as “unread from here” on the RingCentral desktop and web app. This feature can help you keep your place when reading a conversation.

When you use this feature, you’ll see a message count that indicates the number of unread messages in the conversation.

## Marking a message as unread in conversation

1. Hover over any message to mark where you want to start re-reading a conversation.
2. Click the flag icon, or click the three-dot **More** icon, then click **Mark unread from here**.



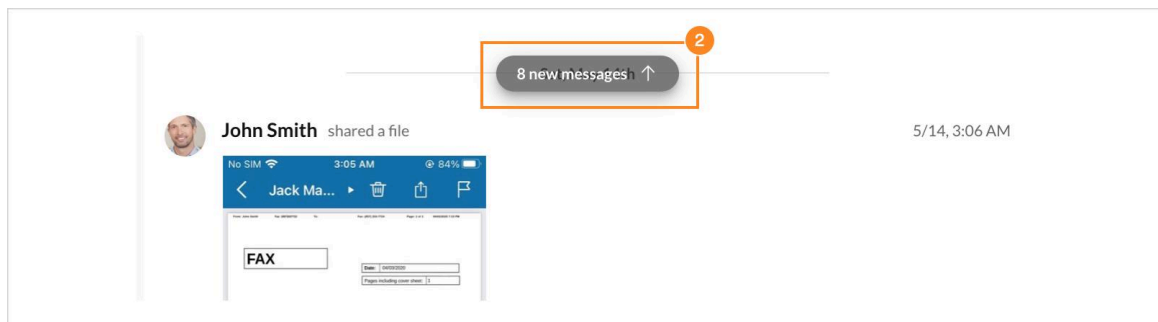
The unread message count will be displayed next to the name of your conversation(s).

**Note:** If you have set the **New message badge** count in Message settings to **Direct messages and mentions only**, no badge count will be displayed on Team messages in which you aren’t mentioned. Only the team name will be displayed.

## Viewing unread messages in a conversation

To reread a conversation from the unread marker:

1. Open the conversation.
2. Click the new message button at the top of the conversation.



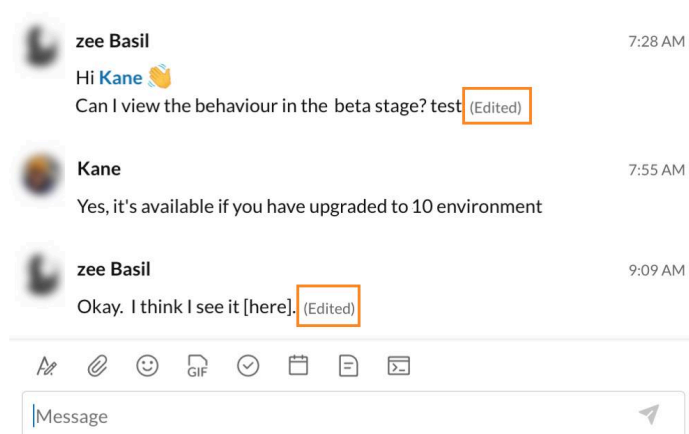
3. A new message badge will redirect you to the message you marked as unread.

Note: If all unread messages fit on the page, you won't see the *new message* badge.

## Editing a message

1. Go to **Message** in the left navigation bar.
2. Select a conversation from the list.
3. Hover over the message, then click **Edit post** (pencil).
4. When you're finished, press **Enter/Return** or click the **blue arrow** next to the message.

An *(Edited)* notification with a timestamp will appear next to the message. You can edit your message multiple times, but you'll only see the timestamp for the latest edit.



Note: You'll need to follow a different process for editing message attachments. To learn more, read [Managing attached files in the RingCentral app desktop and web](#).

## Deleting a message

1. Go to **Message** in the left navigation bar.
2. Select a conversation from the list.
3. Click the three-dot **More** icon next to the message.
4. Click the **Delete post** (trash can) icon.
5. Click **Delete** in the popup.

Note: If you delete a message that contains an attachment but no text, you can skip Step 2.

## 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.



**New task (team2\_u2\_u3)**

**Task title**  
Enter task title

---

**Team**  
team2\_u2\_u3

**Category**  
Select category

---

**Assignees**  
Enter names [Add all \(5 members\)](#)

---

**Due date**  
Pick a date

**Due time**  
Pick a time

---

**Repeat**  
None

**Complete when**  
Checked

---

**Color tag**

Hey, can you send me a pdf version of the invoice? Thanks.

Cancel Post and new Post and close

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](#).

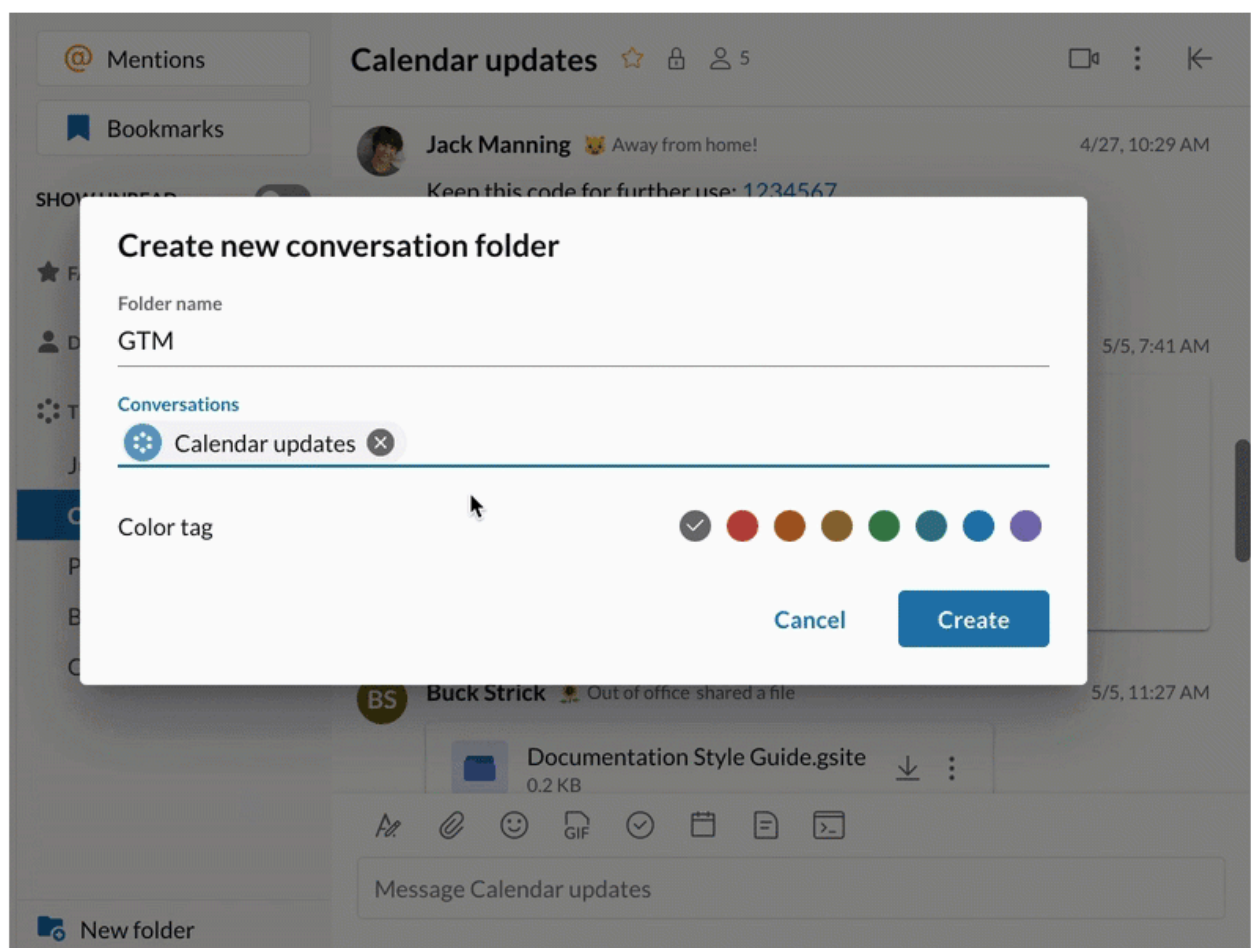
## Organizing conversations

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**.

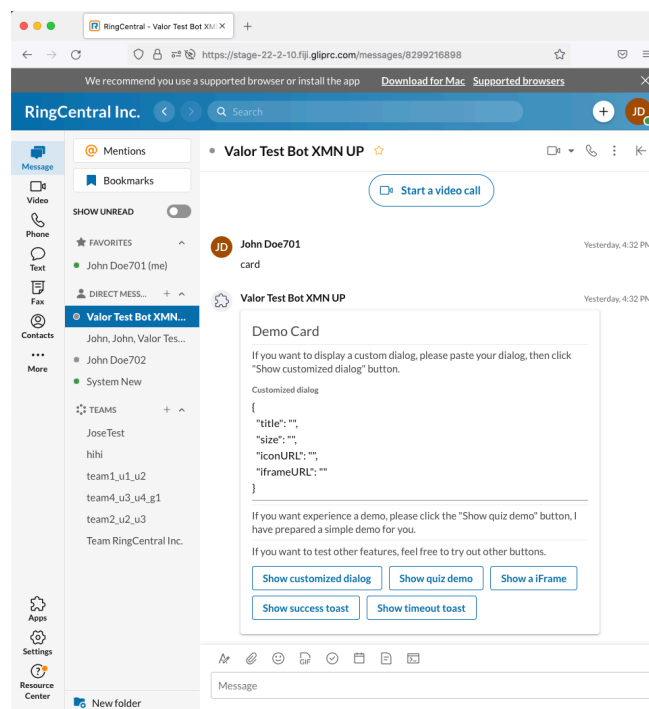


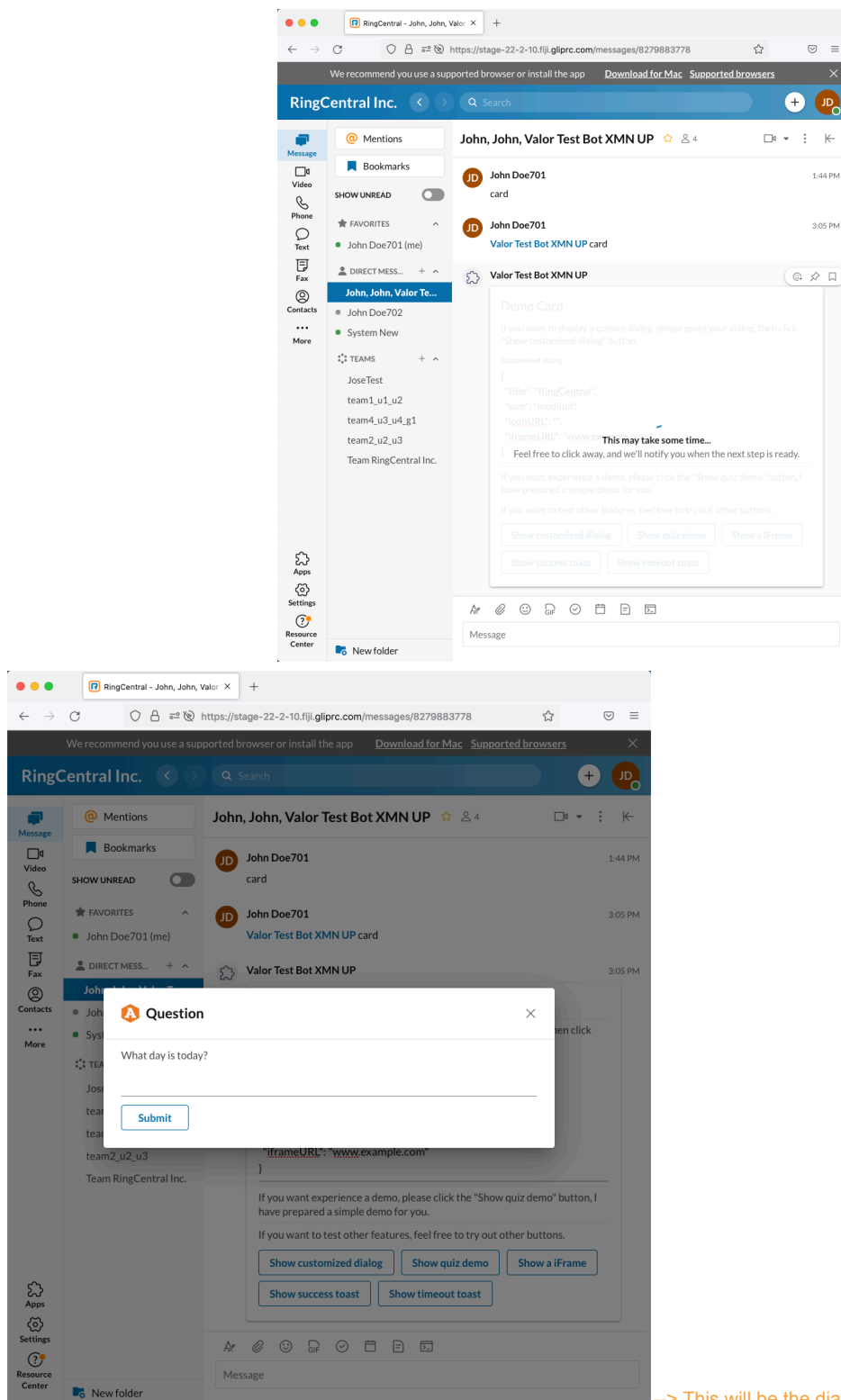
## Moving a conversation to a folder

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.

## Revise dialogs

Developers can invoke a dialog/modal window and render content. To edit the content, click the card button and customize the content as needed.





--> This will be the dialog title and app name defined by developers.

## Creating a team

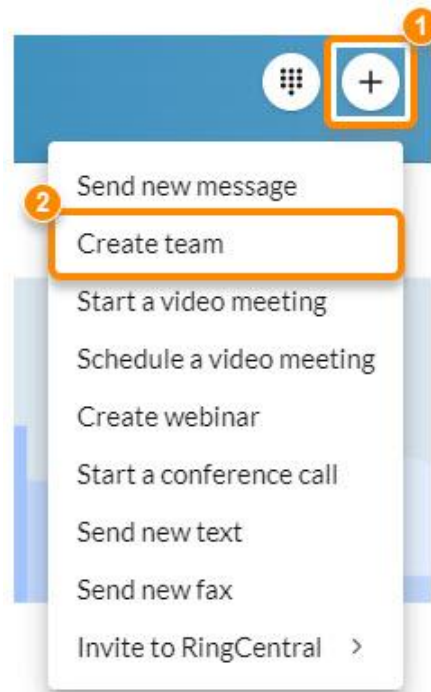
A team is a conversation held between a group of people within your company. Any RingCentral app user can create teams, and the person who creates a team automatically becomes that team's administrator.

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.

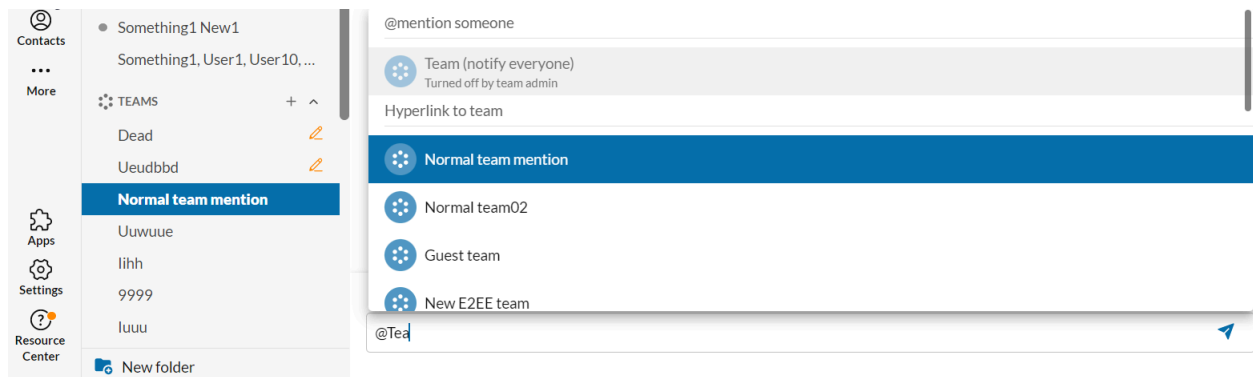


3. Provide a name for your team in the **Team name** field.
4. Enter a list of names or email addresses in the **Members** field.
5. Provide a description in the **Team description** field (optional).
6. Choose either *Private* or *Public* from the **Type of team** dropdown (more on that below).
7. Toggle 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. You can also modify other settings, such as turning off mentions. If you do, the user will see a message in the dropdown when attempting to use the feature.



## Assigning a team member as an admin

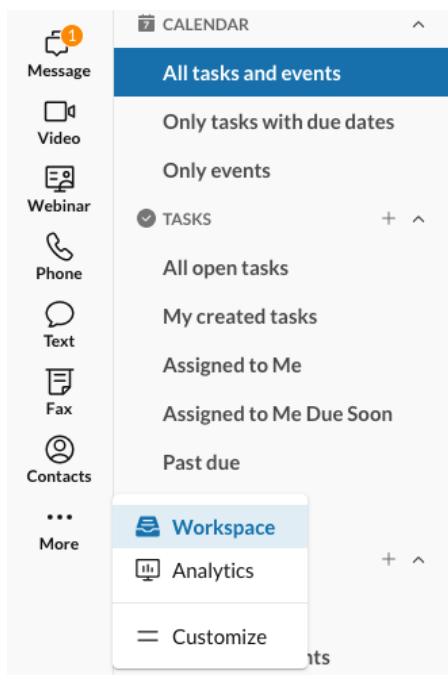
Once you've created a team, you can assign specific members as administrators. Read our article on [admin assignments in teams](#) for more information.

## Creating an event

Events are a way for you and your co-workers to keep track of what's happening with individuals, within a team, and within the company. This can be useful in situations like checking when someone will be out of the office and unavailable.

### Creating events in the Workspace menu

1. Go to **Workspace** in the left navigation bar.



2. Click on the **New event** plus button at the far right of the **Events** tab in the left pane.
3. Select a team in the **Team** field.
4. Provide a title for your event in the **Event title** field (required).
5. Set the **Start date** (required) and **End date** (optional) of the event.
6. Check the **All day** box if the event runs all day for the dates specified  
OR  
Set the **Start time** and **End time** of the event.
7. If you want the event to repeat, select an option from the **Repeat** dropdown menu and configure the settings for the option you selected (optional).
8. Type the location of the event in the **Location** field (optional).
9. Select a color for the event via the **Color tag** setting (optional).
10. Click the paperclip icon to attach a file (optional).
11. Enter an event description in the field at the bottom of the window (optional).
12. Select the **Create** button to finish creating the event.



## Creating events in a conversation

1. Go to **Message** via the left navigation bar.
2. Select a conversation from the conversation list.
3. At the bottom of the app, click the **New event** calendar icon above the message field to open the **New event** window.
4. Provide a title for your event in the **Event title** field (required).
5. Set the **Start date** (required) and **End date** (optional) of the event.
6. Check the **All day** box if the event runs all day for the dates specified.  
OR  
Set the event **Start time** and **End time**.
7. If you want the event to repeat, select an option from the **Repeat** dropdown menu and configure the settings for the option you selected (optional).
8. Type the location of the event in the **Location** field (optional).
9. Select the color you'd like to use for the event via the **Color tag** setting (optional).
10. Click the paperclip icon to attach a file (optional).
11. Enter an event description in the field at the bottom of the window (optional).
12. Select the **Create** button to finish creating the event.

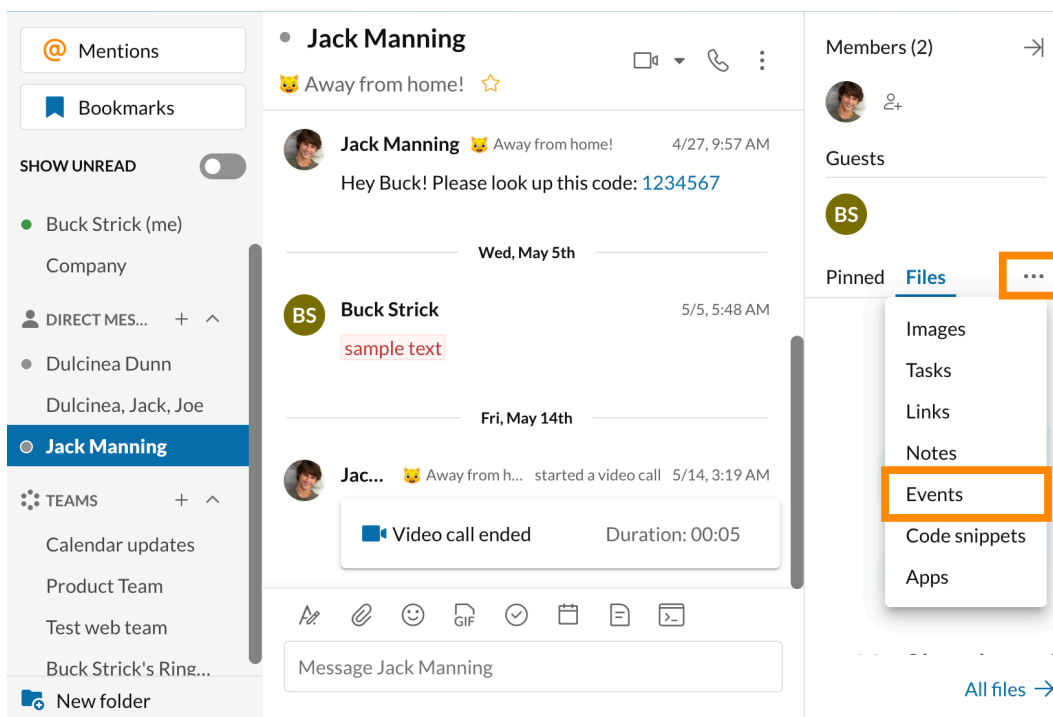
## Viewing team events calendar

When you create an event, it appears in the message thread and shows the event name, event date and time (including whether it's set to repeat), location, and description. You can view, sort, and filter through all events in a single place in the view of a calendar by day, week, and month. To see any of these events, you can either view it under the conversation details panel in a conversation or navigate to the **Workspace** menu.

## Viewing team events in the conversation details

When a user creates an event in a conversation, in addition to finding that event in the message thread, you can also access all upcoming events created in that conversation.

1. Navigate to **Message** via the left navigation bar.
2. Select a conversation from the conversation list.
3. Click on the **More** three-dot menu in the conversation details pane at far right, then select **Events**.



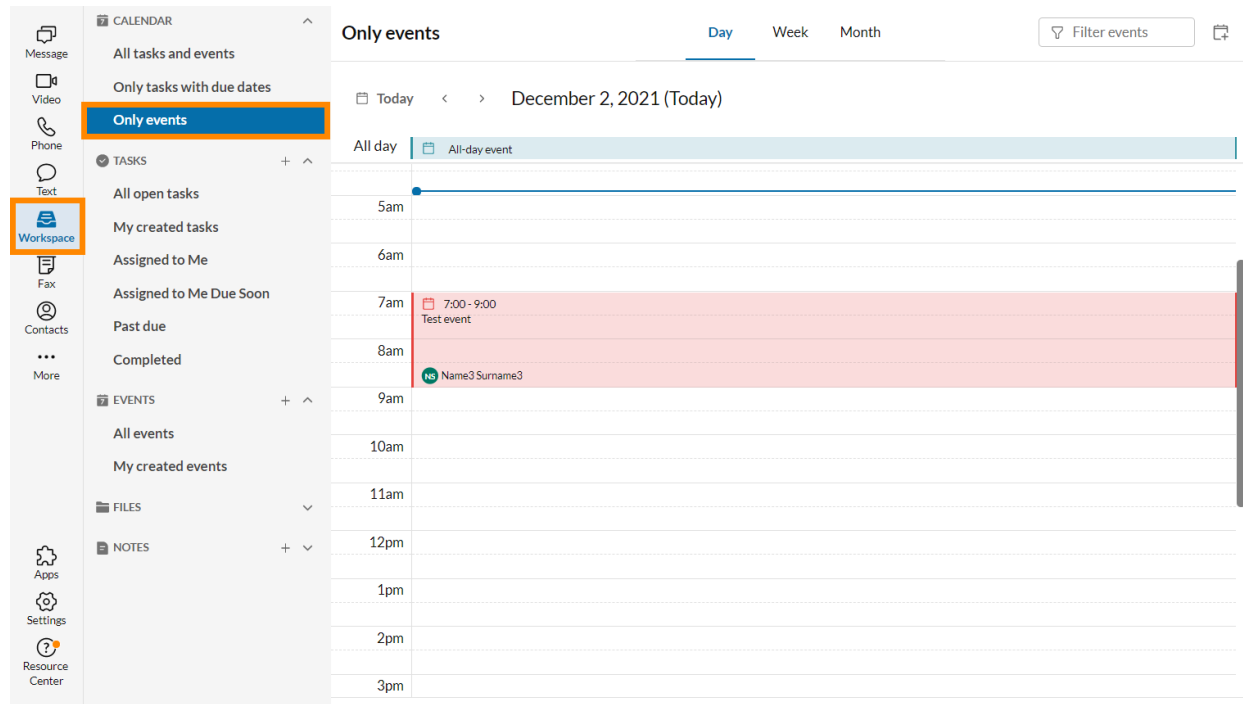
If you'd like to view all team events in that conversation, including past events, click **All events** in the bottom right corner of the conversation details pane to view the team events calendar.

Events are ordered with the current or soonest upcoming events at the top of the list, and you can click on any entry to open and view its details.

## Viewing team events calendar in the Workspace menu

The **Only events** or **All tasks and events** tab in the Workspace menu contains all the events created in your conversations, including direct messages, group conversations, and team conversations. At the top center of the right pane, you can select from the following type of views:

- **Day:** Contains all-day events and all events for the current day with its time indicator. You can go to the previous or next day's team events by clicking the left and right arrows at the top left side of the right pane. Click **Today** to go back to the current day's events.
- **Week:** Contains all your events for the current week with a time indicator at the left side of the right pane. The current day and its events are highlighted. On the upper right, you can customize your view by selecting *Show weekends*, *Hide weekends*, *Start from Sunday*, or *Start from Monday*.
- **Month:** Contains all your events for the current month. The current day's events are highlighted. On the upper right, you can customize your view by selecting *Show weekends*, *Hide weekends*, *Start from Sunday*, or *Start from Monday*.

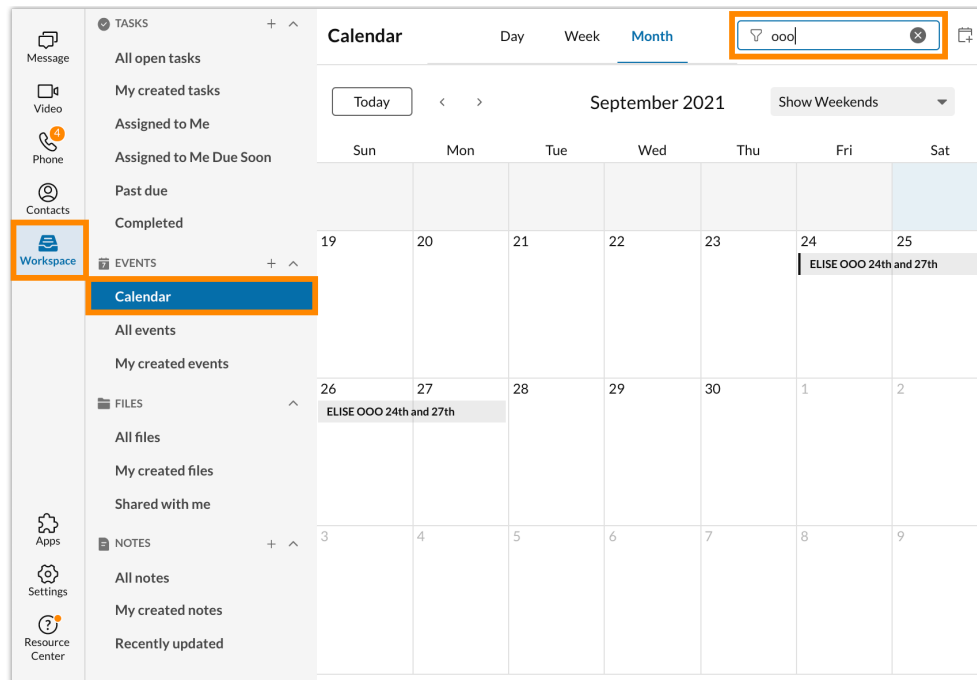


At the top of the right pane, to the right of the **Today** button, you'll find two opposite-pointing arrows. If you'd like to see the events from the previous month, click the left arrow. The right arrow will take you to the events for the next month.

To view the details of the event, click on the event to open the **Event** detail window.

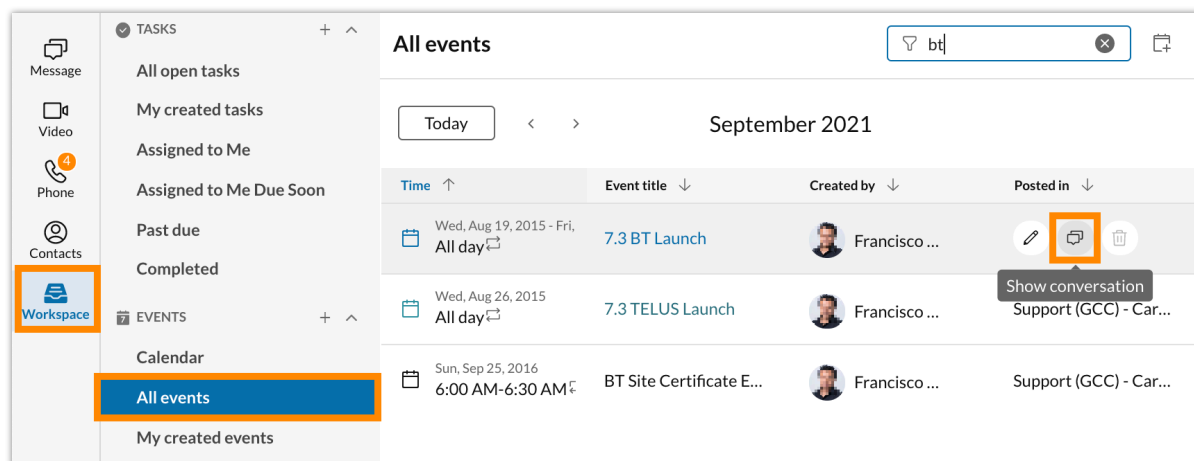
## Finding an event in the **Workspace** menu

1. Navigate to **Workspace** via the left navigation bar.
2. Under **Events** on the left pane, select the appropriate tab associated with the event you're looking for.
3. Begin typing into the search bar at the upper right side. As you type, a list of results matching your search will appear on the right pane.



### Showing in a conversation

1. Navigate to **Workspace** via the left navigation bar.
2. Go to **All events** and locate the event by browsing through the list of events or by using the search bar at the upper right side.
3. Hover over the event and click the **Show conversation** double chat bubble icon that appears at the far right.

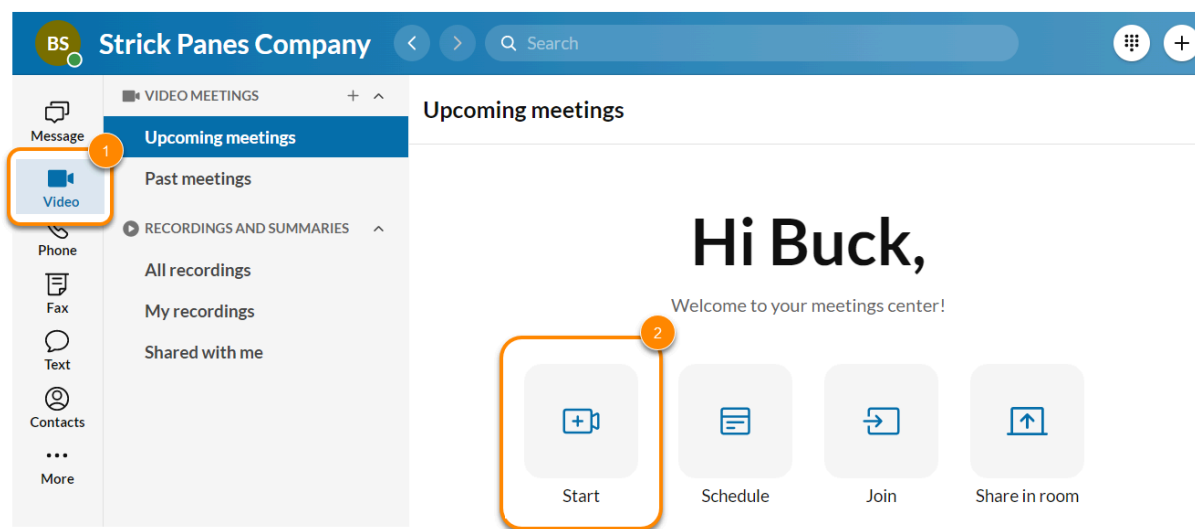


## Using RingCentral Video

### 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.



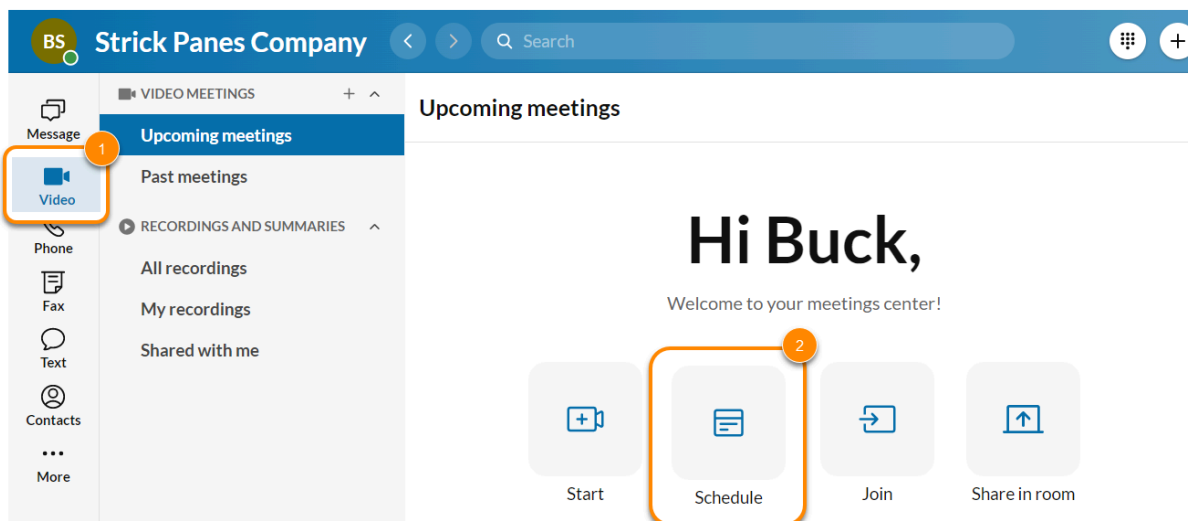
3. Connect your audio. For RingCentral Video, visit [Joining RingCentral Video audio on desktop and web](#).
4. Invite participants. For RingCentral Video, visit [Inviting others to join a RingCentral Video meeting on desktop and web](#).

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. Go to **Video** in the left navigation bar.
2. On the **Upcoming meetings** page, click the **Schedule** button at the top to open the **Schedule a meeting** window.



3. Enter your meeting details and adjust your settings:
  - a. Enter your **Meeting title** and set the **Date**, **Time**, and **Duration**.
  - b. Select **Recurring meeting** if you'd like the meeting to repeat.
  - c. If you're [scheduling on behalf of someone else](#), select their name in the **Schedule for** dropdown.
  - d. In the **Schedule using** dropdown, you can send your invitation using your preferred calendar or select Meeting info and share the invitation in an email or text message.
    - i. If you schedule using your preferred calendar, you can select **Create team and invite** members to create a new team with your meeting participants. The **Team name** will be the title of the meeting by default. You can delete this title and add your own.
  - e. Select **Use personal meeting** to schedule the meeting with your [Personal meeting ID](#) instead of a different meeting ID.
  - f. Adjust the remaining settings under [Meeting settings and Advanced settings](#).

**Schedule a meeting**

Meeting title  
Enter a meeting title

Date 8/12/2022 Time 04:00 PM Duration 1 hr 00 min

Recurring meeting ☐

Schedule using

Create team and invite members ☐

Use personal meeting: ☐

Meeting settings

Require password ☐

Participants can only join after me ☐

Enable waiting room ☐

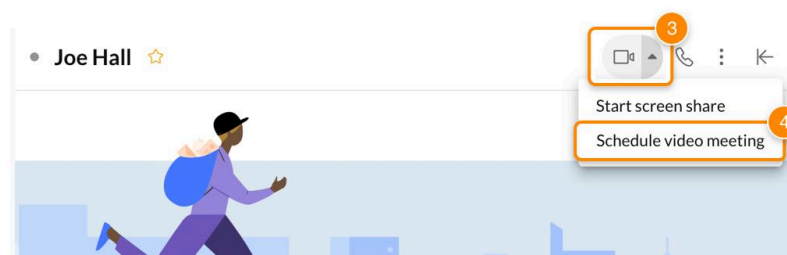
[Advanced settings](#)

[Cancel](#) [Schedule](#)

4. Click **Schedule**.
  - a. If you scheduled using a calendar, clicking **Schedule** will open your synced email account with an email that has your video meeting information filled in automatically. Add contacts, then send the email as you normally would.
  - b. If you scheduled using Meeting info, clicking **Schedule** will display your meeting information for you to copy and share.

## Scheduling a video meeting in a conversation

1. Go to **Message** in the left navigation bar.
2. Select a conversation from the left panel.
3. Click the **Video** actions dropdown at the upper right of the main panel.



4. Select *Schedule video meeting*.
5. Enter your meeting details and adjust your settings:
  - a. Enter your **Meeting title** and set the **Date**, **Time**, and **Duration**.
  - b. Select **Recurring meeting** if you'd like the meeting to repeat.

- c. If you're [scheduling on behalf of someone else](#), select their name in the Schedule for dropdown.
- d. In the **Schedule using** dropdown, you can send your invitation using your preferred calendar or select *Meeting info* and share the invitation in an email or text message.
- e. Add or remove **Participants**.
- f. Select **Use personal meeting** to schedule the meeting with your [Personal meeting ID](#) instead of a different meeting ID.
- g. Adjust the remaining settings under [Meeting settings and Advanced settings](#).

**Schedule video meeting with Joe Hall**

---

**Meeting title**  
Enter a meeting title

---

Date: 8/12/2022    Time: 05:00 PM    Duration: 1 hr 00 min

Recurring meeting: ☐

Schedule for: Myself

Schedule using: Outlook web calendar

Participants: JH Joe Hall (x) [Clear](#)

Use personal meeting: ☐

**Meeting settings**

Require password: ☒

Participants can only join after me: ☒

Enable waiting room: ☒

Enable waiting room for: Anyone outside my com...

[Advanced settings](#)

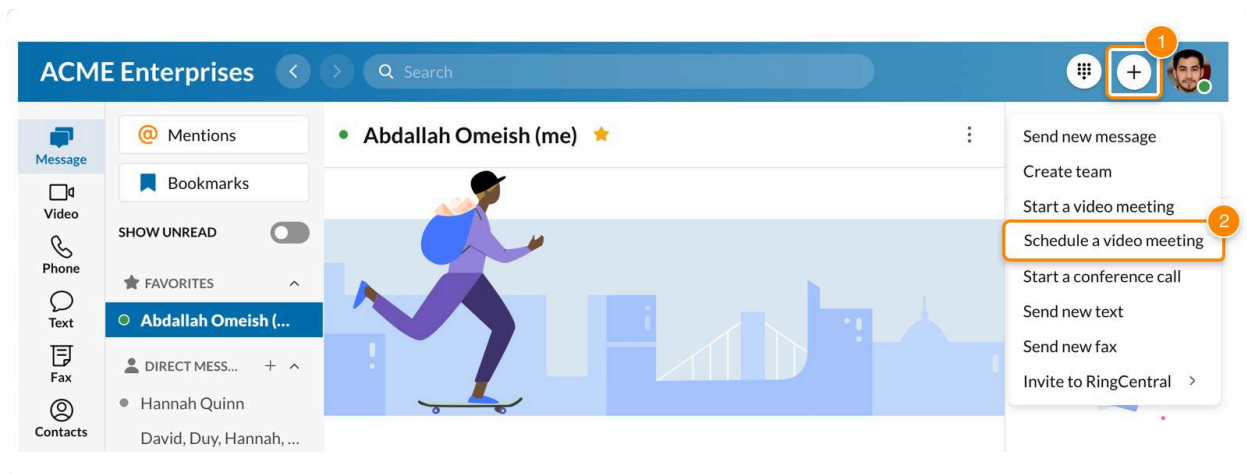
[Cancel](#) [Schedule](#)

6. Click **Schedule**.
  - a. If you scheduled using a calendar, clicking **Schedule** will open your synced email account with an email that has your video meeting information filled in automatically. Add contacts, then send the email as you normally would.
  - b. If you scheduled using Meeting info, clicking **Schedule** will display your meeting information for you to copy and share.

## Scheduling a video meeting from the new actions button

1. Click the **new actions (+)** button in the upper right corner next to your profile picture.
2. Select **Schedule a video meeting**.





3. Enter your meeting details and adjust your settings:
  - a. Enter your **Meeting title** and set the **Date, Time, and Duration**.
  - b. Select **Recurring meeting** if you'd like the meeting to repeat.
  - c. If you're [scheduling on behalf of someone else](#), select their name in the **Schedule for** dropdown.
  - d. In the **Schedule using** dropdown, you can send your invitation using your preferred calendar or select *Meeting info* and share the invitation in an email or text message.
    - i. If you schedule using your preferred calendar, you can select **Create team and invite members** to create a new team with your meeting participants. The **Team name** will be the title of the meeting by default. You can delete this title and add your own.
  - e. Select **Use personal meeting** to schedule the meeting with your [Personal meeting ID](#) instead of a different meeting ID.
  - f. Adjust the remaining settings under [Meeting settings and Advanced settings](#).

**Schedule a meeting**

Meeting title  
Enter a meeting title

Date: 8/12/2022 Time: 04:00 PM Duration: 1 hr 00 min

Recurring meeting ☐

Schedule using <sup>①</sup> Outlook web calendar ▼

Create team and invite members <sup>①</sup> ☐

Use personal meeting: <sup>①</sup> ☐

Meeting settings

Require password ☐ Alphanumeric only

Participants can only join after me ☐

Enable waiting room ☐

[Advanced settings ▼](#)

[Cancel](#) [Schedule](#)

4. Click **Schedule**.
  - a. If you scheduled using a calendar, clicking **Schedule** will open your synced email account with an email that has your video meeting information filled in automatically. Add contacts, then send the email as you normally would.
  - b. If you scheduled using Meeting info, clicking **Schedule** will open your meeting information for you to copy and share.

## Configuring your RingCentral Video meeting settings

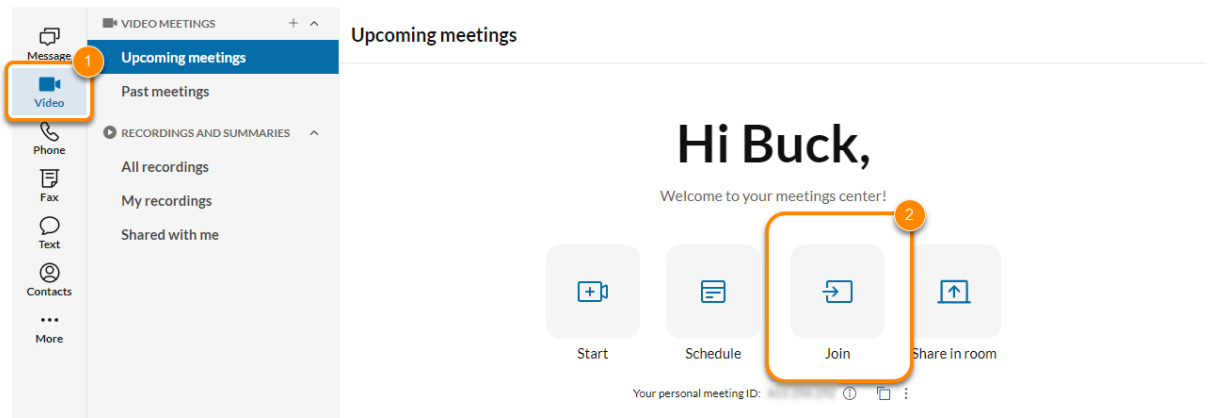
- **Meeting title:** Title of your meeting. This will be displayed during the meeting and be used for the recording's title. This will also be used for the meeting invite if selecting a calendar.
- **Date:** Date on which you'd like to host the meeting.
- **Time:** Time for which you'd like to host the 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, Exchange 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. Go to **Video** in the left navigation bar.
2. Click the **Join** button at the top of the main panel.



3. Enter the meeting info, or select a meeting from the dropdown.

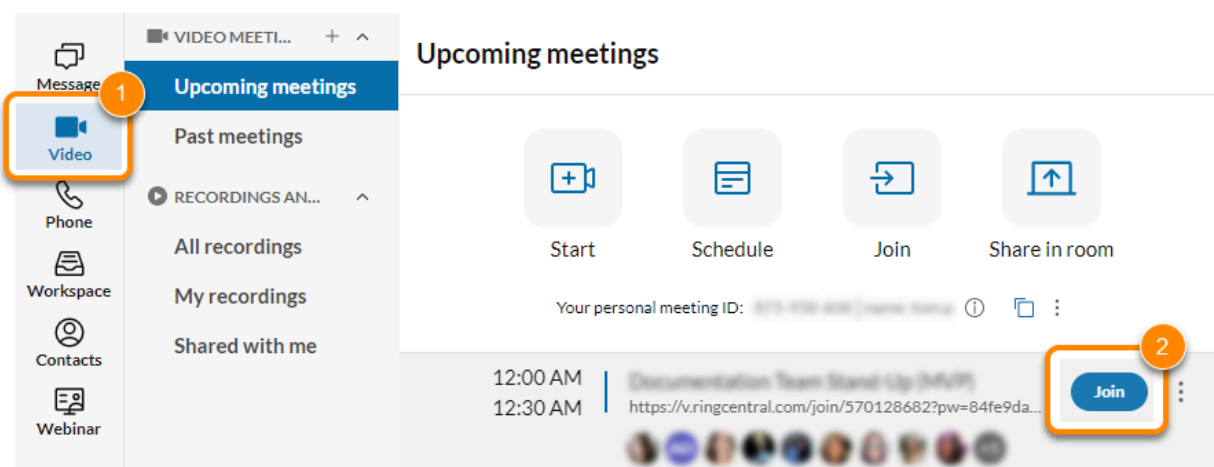


4. Click **Join**. Enter a password if required.
5. [Choose how you'd like to connect your audio](#)

## Using the meetings page

If you've [connected your calendar](#), scheduled meetings will appear on the **Upcoming meetings** page as a list.

1. Go to **Video** in the left navigation bar.
2. On the **Upcoming meetings** page, hover over the scheduled meeting and click **Join**.



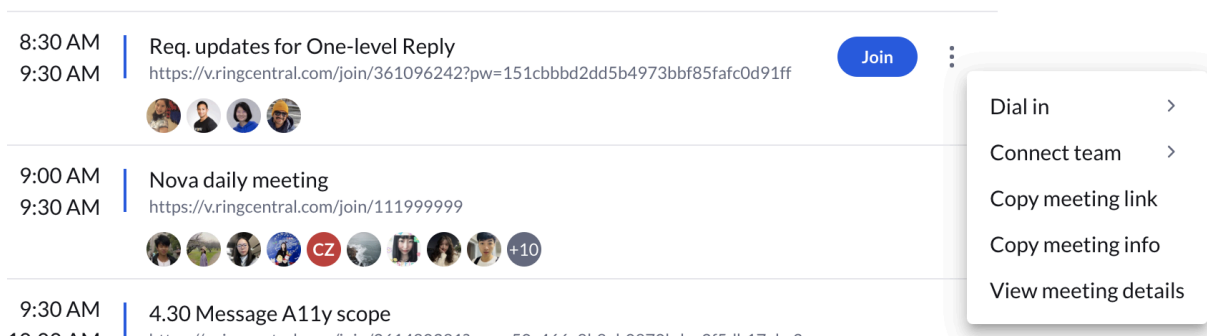
### 3. [Choose how you'd like to connect your audio](#)

You can also view all meetings you've attended by clicking **Past meetings**.

## Using only audio

To join a meeting using audio only, make sure you have phone features turned on at the company account level.

1. Go to **Video** in the left navigation bar.
2. Hover over a scheduled meeting and click the **More** icon to the right of the **Join** button.
3. Click **Dial in**. Your dialpad will open, and you'll automatically join the meeting. RingCentral Video meeting invitations display your premium purchased phone numbers along with the default RingCentral Video meeting numbers and dial-in options. For your premium numbers to be displayed in your meeting invitations, you'll need to add them using the [Admin Portal](#).



**Note:** Clicking **More (three vertical dots)** > **Connect team** lets you connect a new or existing team to the meeting for easy collaboration.

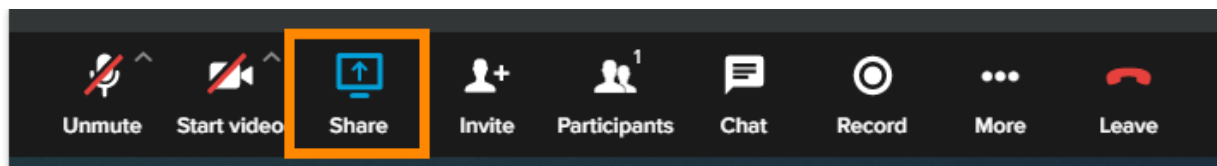
## Using RingCentral Video attendee controls

Attendees in a RingCentral Video meeting can access the following controls via the bottom bar during a meeting:

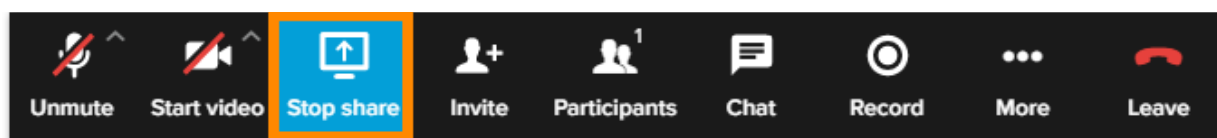
- **Meeting information:** The letter 'i' icon at the bottom left corner allows you to view or copy the meeting details.
- **Network connection:** The signal icon shows the network connection details, including packet loss and jitter for sharing, video, and audio for upstream and downstream media streams. You will also see latency, which is measured for both upstream and downstream, so it is the same value for both. Clicking **Diagnose issues** redirects to the [RingCentral Network Test](#) service that provides the capability to diagnose network conditions.
- **Mute/Unmute:** Mute or unmute your microphone.
- **Start/Stop video:** Turn your camera on or off.
- **Share:** Share your screen or whiteboard.
  - *Share screen:* Share your current screen or window.
  - *Whiteboard:* Enable the whiteboard. [Learn more](#)
- **Invite:** Invite others to the meeting by phone, email, invite link, or invite details.
- **Participants:** View the other meeting participants.
- **Chat:** Send public or private messages to anyone in the meeting.
- **Reactions:** Raise/lower your hand or share nonverbal reactions to participate in the video meeting.
  - *Raise hand:* Raise hand to get the attention of the host, moderator, or presenter.
  - *Feedback:* Asks the host, moderator, or presenter to Slow down or Speed up and react Yes or No.
  - *Status:* Set by participants to show if they will Be right back or are Multitasking.
  - *Feelings:* Share feelings with an emoji. Choose to send a thumbs up, applause, surprised, laughing, or sad emoji. Note: Feelings will disappear after 10 seconds.
- **More:** Click here to find the following options:
  - *Background & effects:* Enable *Background & effects* to display an image or video as your background during a meeting.
  - *Presentation mode:* Enable presenter overlay in Presentation Mode to place your video over the screen you're sharing.
  - *Enable closed captions:* Enable closed captions. Closed captions are visually displayed on the bottom of the meeting screen to provide a better, more inclusive meeting experience by presenting real-time meeting discussions.
  - *Settings:* Configure your video meeting settings.
  - *Send feedback:* Report a problem or give feedback on your meeting session.
  - *Submit feature idea:* Suggest a feature idea for RingCentral Video.
  - *Help:* Open the RingCentral support webpage.
- **Leave:** Leave the meeting.

## Sharing your screen in a meeting

1. Click on the **Share** button via the bottom menu bar.



2. Select which screen you want to share. You can share your entire screen or any of the application tabs you have open.
3. Click **Share**.
4. Click **Stop share** to stop screen sharing.



You can also turn on **Do Not Disturb** while screen sharing from the video settings **General** menu on Windows and **Settings > Video** on Mac. **Do Not Disturb (DND)** while screen sharing lets you turn off notifications while in presentation or screen share mode. This helps protect your privacy and prevent distractions when sharing your screen. To learn more, see [Do Not Disturb while screen sharing](#).

## Optimizing screen share for video

You can screen share videos by optimizing screen share for your video. When **Optimize for video** is enabled, the frame rate of the screen share will increase to improve video quality and motion smoothness.

Note: This option is only available for the RingCentral desktop app.

1. Click on the **Share button** via the bottom menu bar.
2. Select which screen you want to share. You can share your entire screen or any of the application tabs you have open.
3. Tick the **Optimize for video** box.
4. Click **Share**.
5. Click **Stop share** to stop screen sharing.

## Using the whiteboard during a meeting

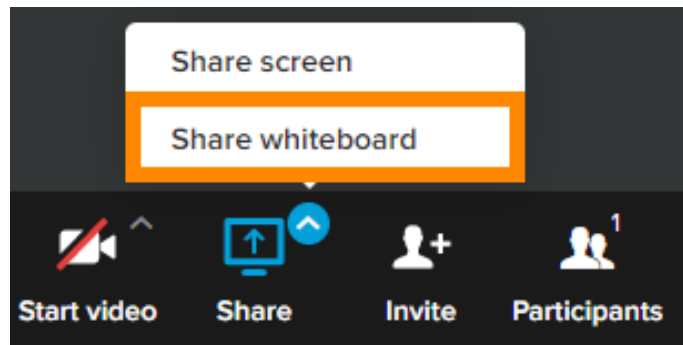
Whiteboard is a virtual collaborative canvas that allows you to express ideas visually. In a RingCentral Video meeting, you can illustrate ideas the way you would on a physical whiteboard for all meeting attendees to see and collaborate.

Any meeting participant can start sharing the whiteboard where everyone can draw, comment, edit objects, and erase them.

Note: Before you use the Whiteboard, make sure your device meets the [system requirements](#).

## Enabling whiteboard

In a meeting, click the up arrow on the **Share** button and select **Share whiteboard**.

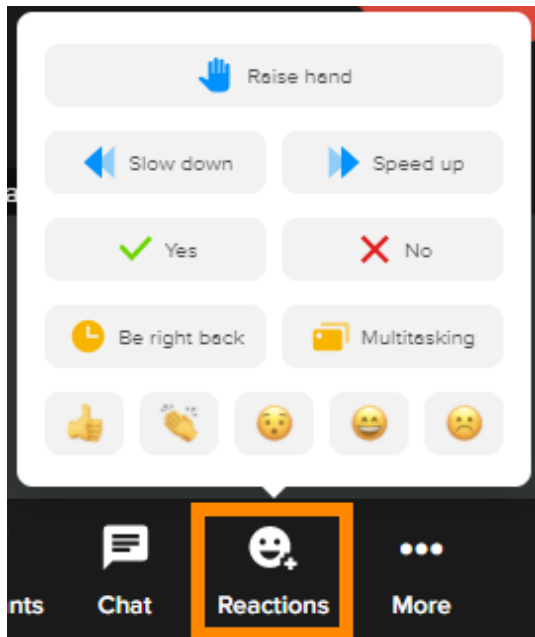


When you share your whiteboard, you can [use the whiteboard tool](#) to collaborate or brainstorm with other participants.



## Sharing a nonverbal reaction during a meeting

1. During a meeting, click the Reactions button at the bottom toolbar.

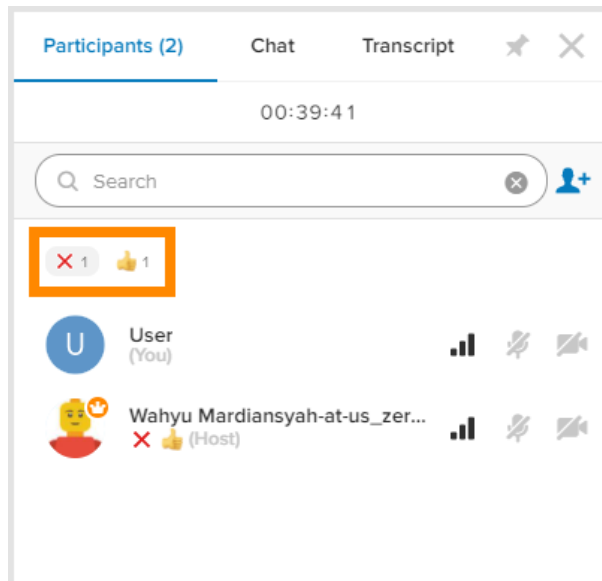


2. You can choose to share the following nonverbal reactions:
  - a. **Raise hand:** Raise your hand to get the attention of the host, moderator, or speaker.
  - b. **Feedback:** Ask the speaker to Slow down or Speed up and react Yes or No.
  - c. **Status:** Set your meeting status to Be right back or Multitasking.
  - d. **Feelings:** Share your feelings with an emoji. Choose to send a thumbs up, applause, surprise, laughing, or sad emoji.
3. To clear a feedback or lower your hand, click the button again or wait for the host to dismiss the reaction.

Note: You cannot have multiple nonverbal reactions, such as Raise hand, Slow down, Speed up, Yes, No, Be right back, or Multitasking. Only your latest reaction will appear. However, your shared feelings or emoji notification can appear alongside the reaction and will disappear after 10 seconds.

## Viewing participants who shared nonverbal reactions

You can see the participants who shared nonverbal reactions or raised their hands by clicking **Participants** at the bottom toolbar. You can also use the filter to view only the participants who shared feedback or raised their hands.

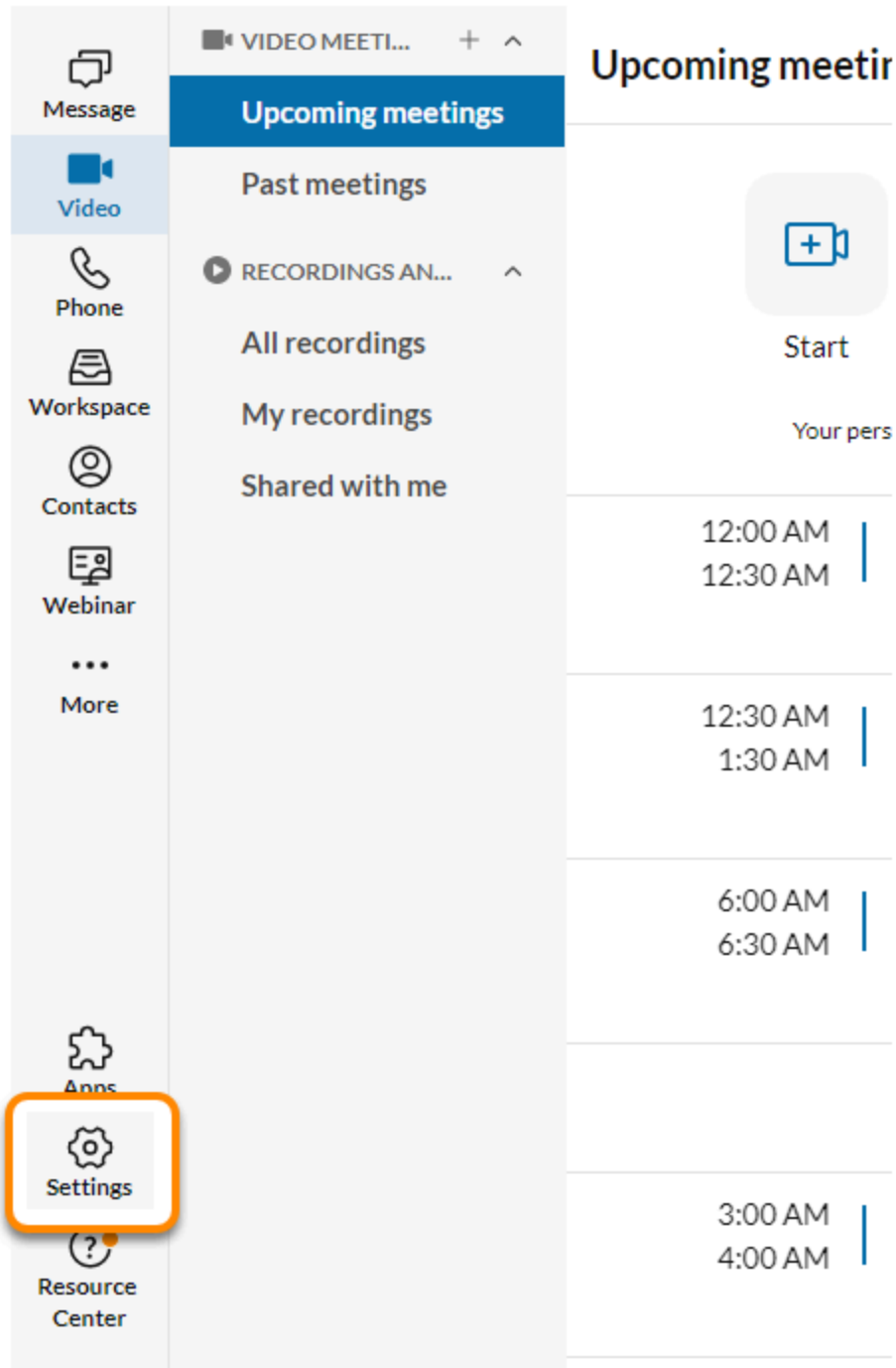


## Sharing your screen in RingCentral Rooms

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

Edit

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

### Share in Room

#### Display Share in Room option

Allow screen sharing in meeting rooms with compatible Room systems



### Screen sharing

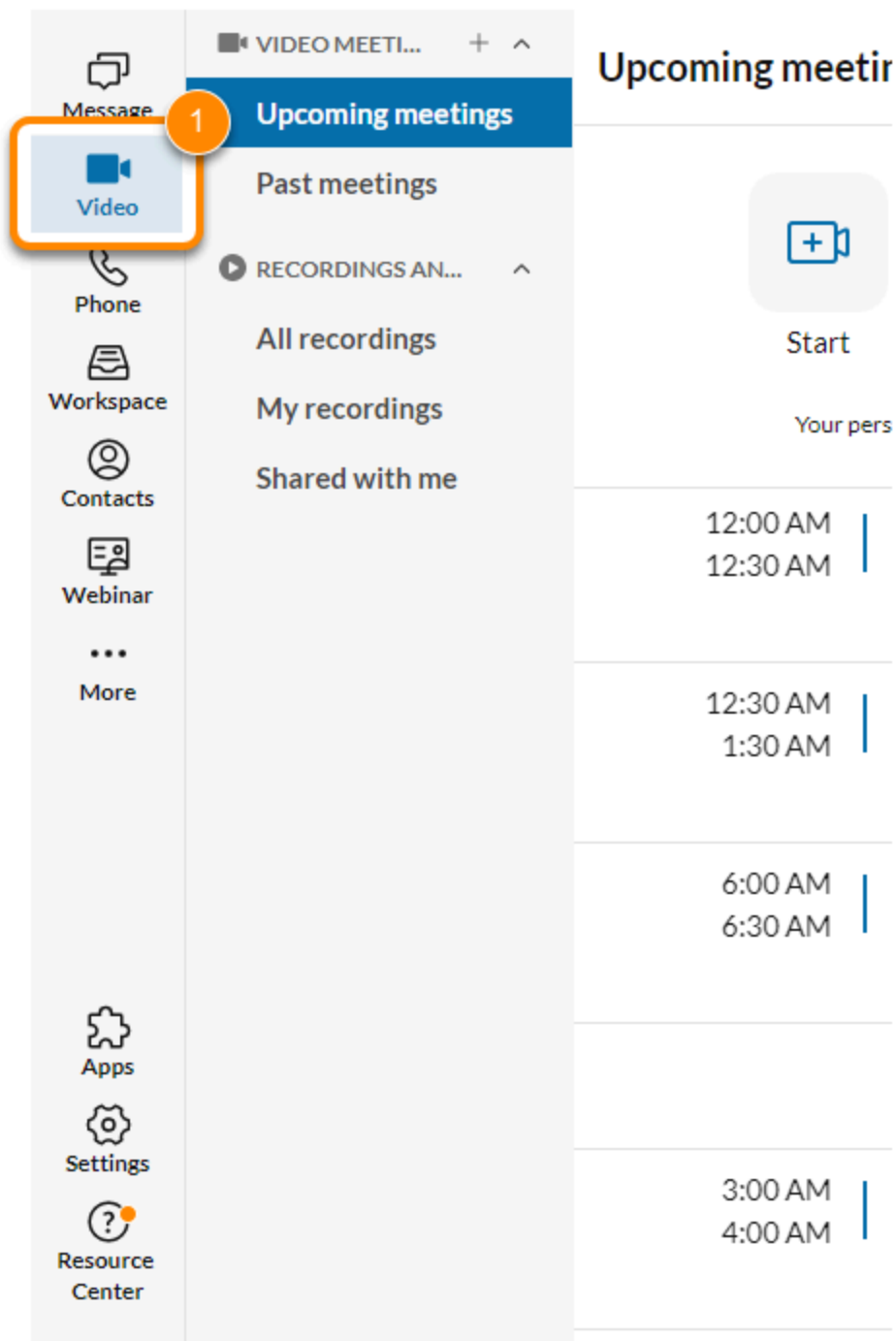
#### Do Not Disturb (DND) while screen sharing

Turn on Do Not Disturb automatically to block all notifications and incoming video calls on all devices while sharing your screen.

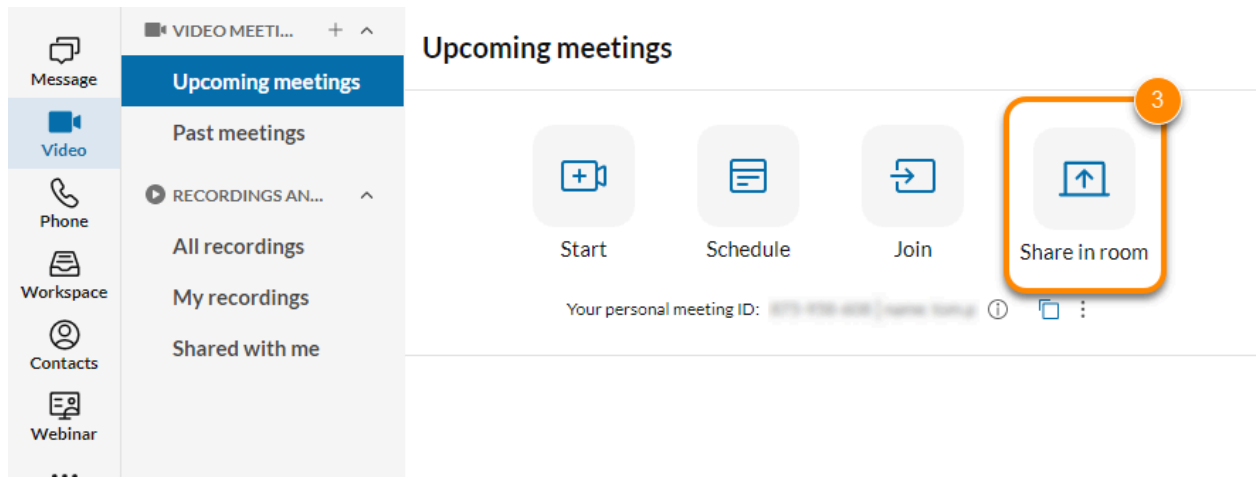


## Using Proximity Sharing for RingCentral Rooms

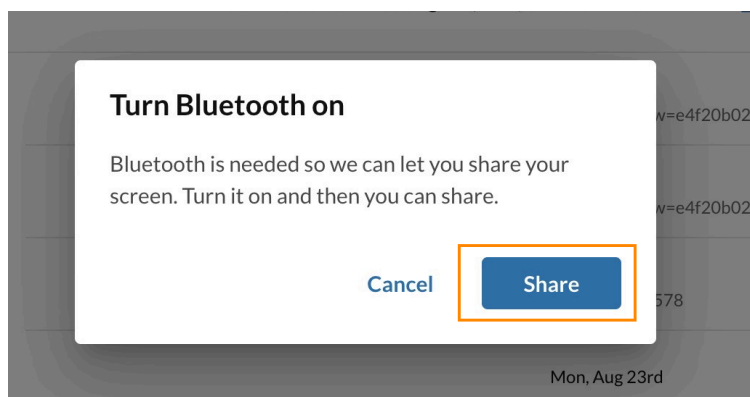
1. Navigate to **Video** via the left-hand navigation bar.



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

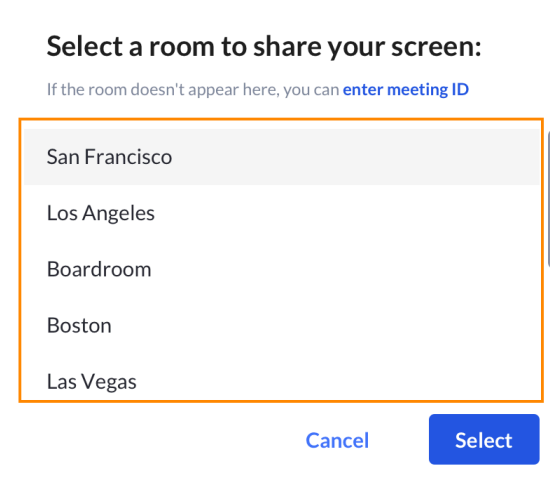


Note: If you haven't allowed RingCentral Rooms to access your Bluetooth, you will receive a prompt asking for Bluetooth access. Click **Share** to give RingCentral Rooms access.



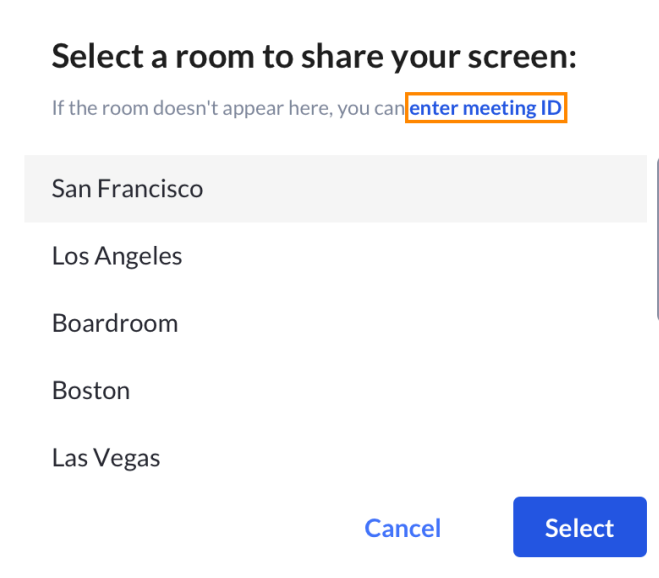
4. Select the Room you want to share in. You can find the Rooms using these methods:
  - a. Proximity: If there are Rooms nearby, you will get a list of the available Rooms.

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



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

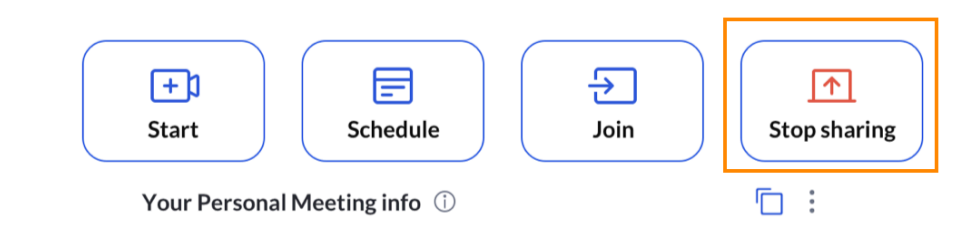
Note: This option will automatically show if no Rooms are detected after 10 seconds.



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 **Upcoming meetings** tab.



## Scheduling a webinar

Webinar hosts can now view all invited panelists and cohosts (up to a maximum of 99) in a centralized location on the webinar dashboard, found in the desktop app. You can click to resend/delete the invitation or view its content.

Hosts may also add the description for a webinar from the dashboard in the desktop app.



Test

×

Event details

✓

Webinar info

✎

Thu, Jul 21st, 2022

11:00 AM - 12:00 PM CST | 1 hour

Description

No

Prep session

No


Require registration

No

⌵

Hosts & panelists ①

(Maximum 100)



Invite cohosts and panelists

✓

Attendees ①

(Maximum 10000)

📅

Google Calendar

📧

Microsoft Outlook

You can also

Download invitation

(ICS file) ①

Settings

⌵

Webinar settings

✎

Security

Edit

Webinar room

Edit

Post-webinar

Edit

✓

Recording

✎

Automatically record this webinar

Off

✓

Q&A

✎

Allow Q&A

On

Allow anonymous questions

On

[Back](#) Hosts and panelists

Cohosts

Panelists

## Invite panelists

You can invite up to 97 more cohosts or panelists. You can also invite RingCentral Rooms as a panelist. ⓘ

Invites have not been sent yet.

2+ Invite

Filter invited/added panelists

Added panelists (invite not sent)

JD

John Doe2001

john.doe2001@kamino1657078805273.com

↗

✉

🗑

JD

John Doe2002

john.doe2002@kamino1657078805273.com

Send now

Send later

## Using Presentation Modes in a RingCentral Video meeting

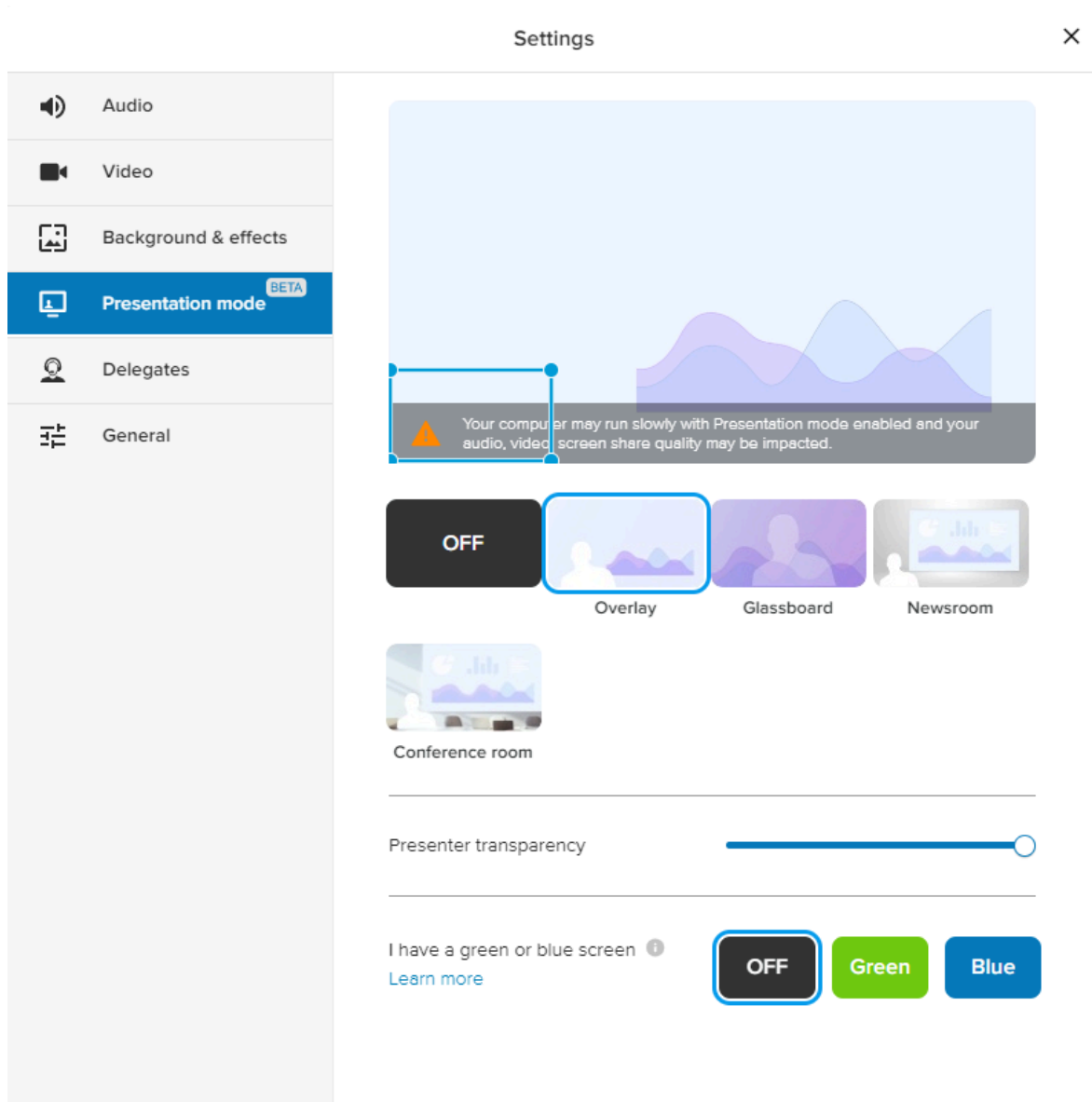
Make your training sessions and sales presentations in RingCentral Video more impactful and immersive with Presentation Modes.

### 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. Drag the blue rectangle on the preview screen to resize or move your video around.
5. Click and drag the slider to adjust the transparency of your video.
6. You can select an option for [I have a green or blue screen](#) if you have one.
7. Close the **Settings** window.
8. Click the **Share** button and select a screen to share.
9. Click **Share**.

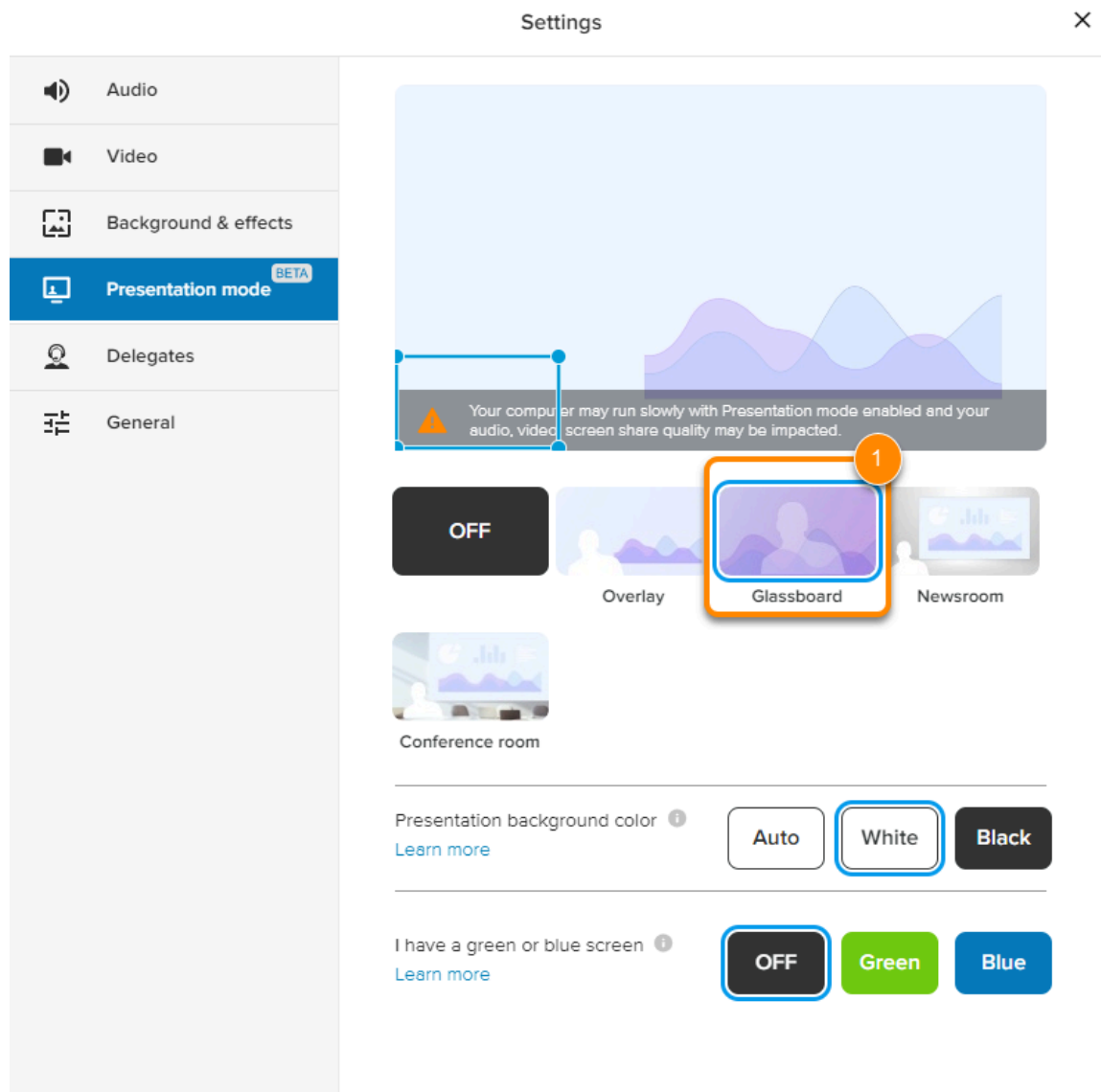
## Glassboard mode

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**.
4. Select the primary background color of your presentation.
  - a. Choose **White** if your presentation is mostly light-colored.
  - b. Choose **Black** if your presentation is mostly dark-colored.



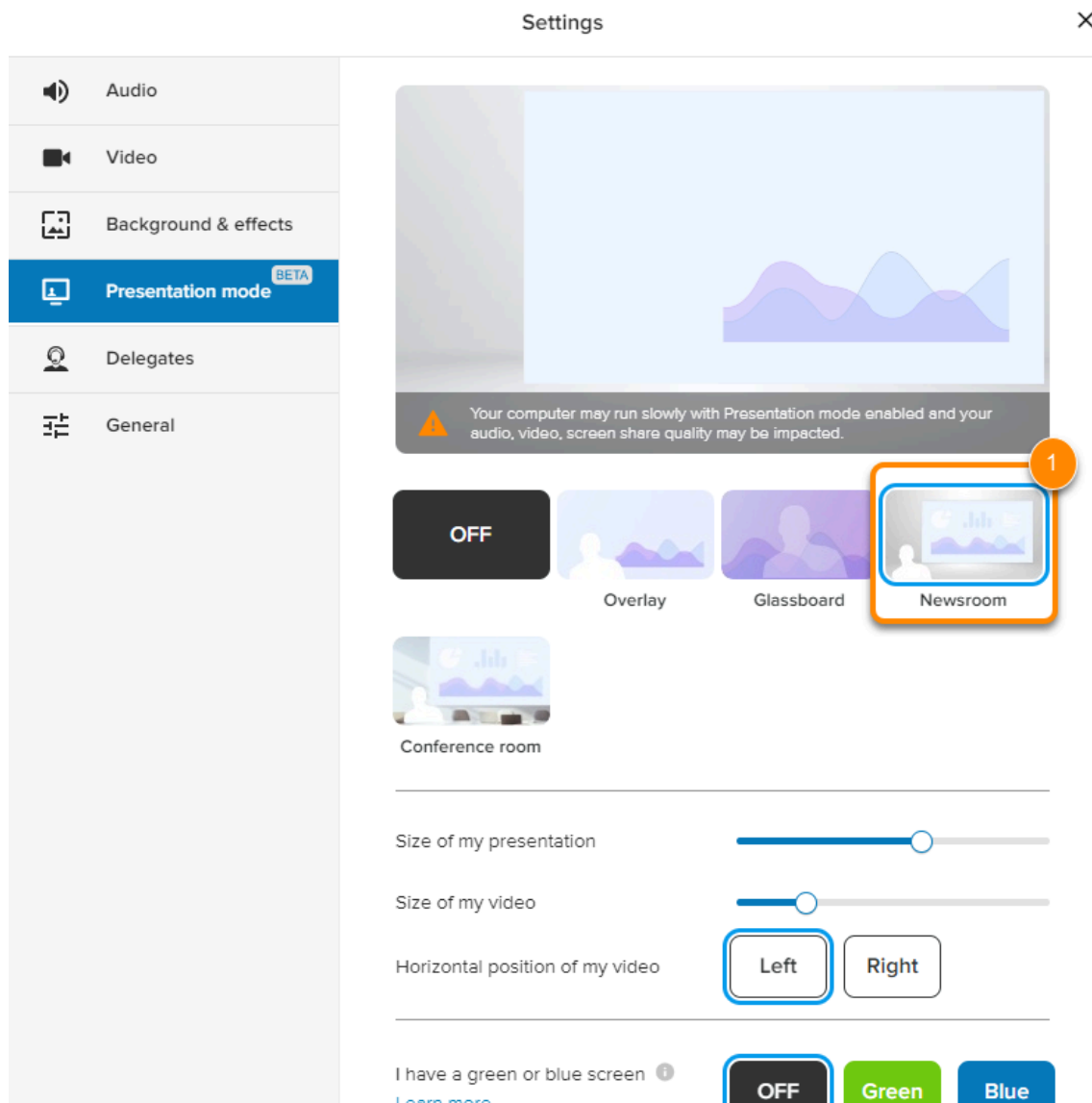
5. You can select an option for I have a green or blue screen if you have one.
6. Close the **Settings** window.
7. Click the **Share** button and select a screen to share.
8. Click **Share**.

## 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. Select either **Left** or **Right** to choose the position of your video.
5. You can select an option for I have a green or blue screen if you have one.
6. Close the **Settings** window.
7. Click the **Share** button and select a screen to share.
8. Click **Share**.

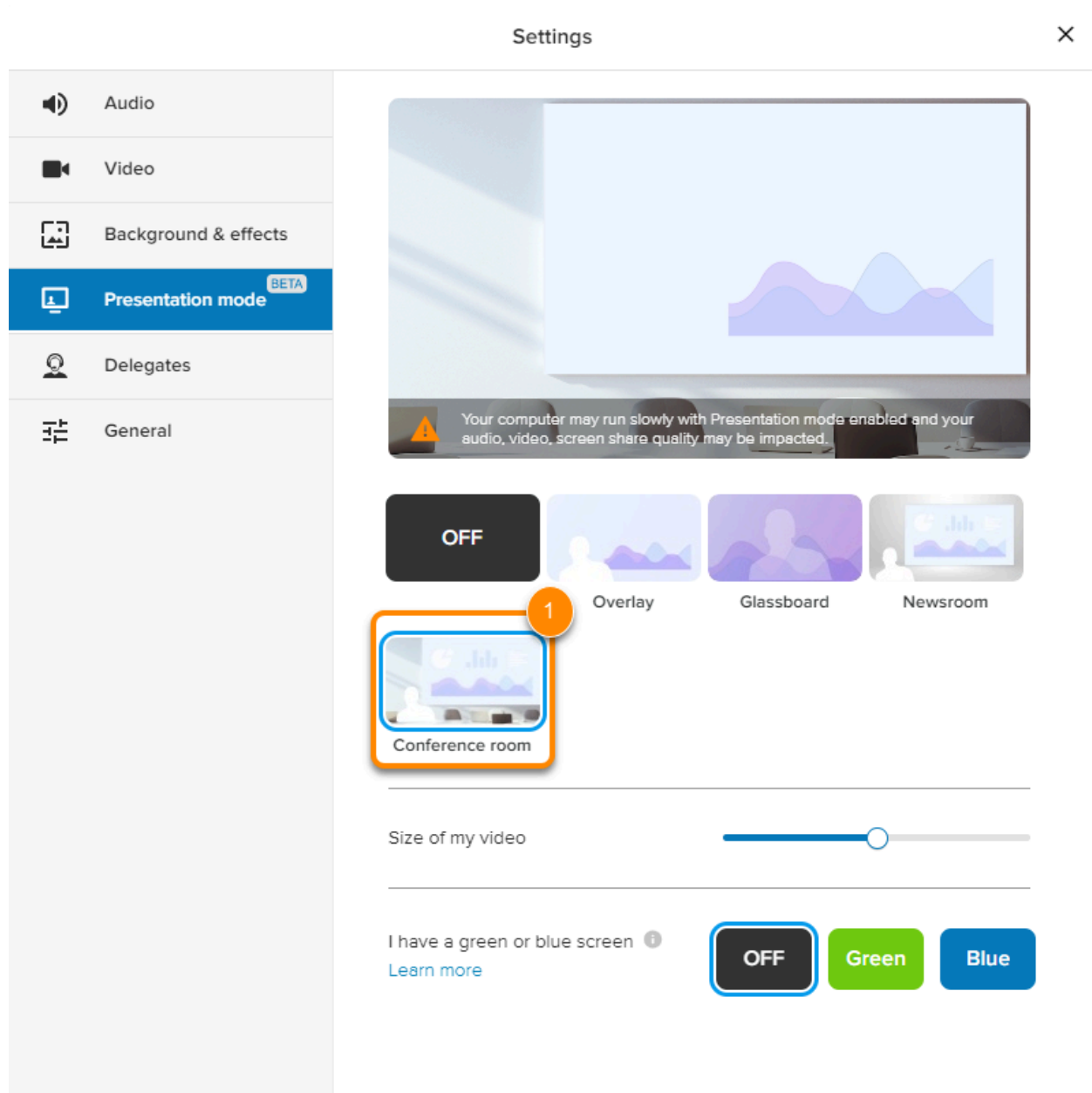
## Conference room mode

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 select an option for [I have a green or blue screen](#) if you have one.
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 Background & effects and Presentation mode**.

## Requesting and approving remote desktop control

RingCentral Video provides remote desktop control during screen sharing in a meeting. Any participant in the meeting can ask the presenter to give them control of their screen during a screen share. When the request is approved, the user can use the mouse, touchpad, and keyboard on the presenter's desktop. Learn more about how this feature can be enabled or disabled from the Admin Portal.

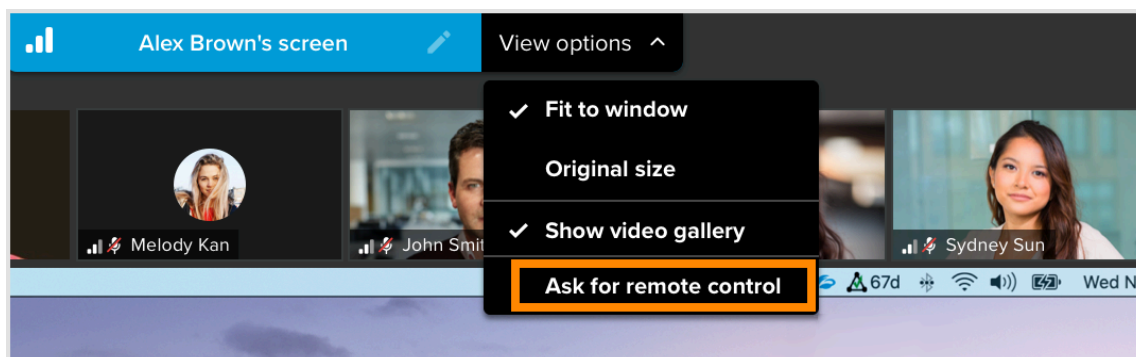
### Limitations

- The remote desktop control feature is available to users using the RingCentral app for desktop. The user who requests control can either use the RingCentral app for desktop or web.
- The remote desktop control feature is available only while full-screen sharing, not while the app is minimized during screen sharing. Only one user is allowed per remote desktop control session.

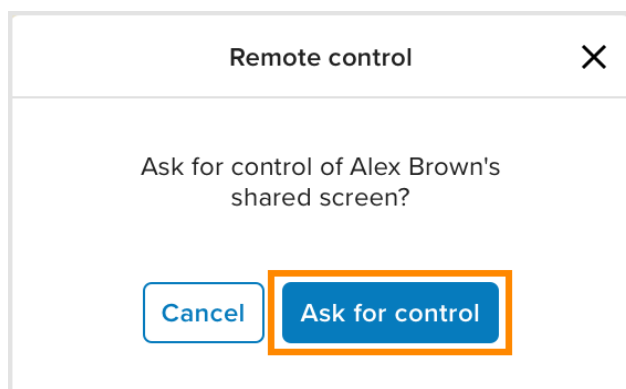
### Requesting remote desktop control during a screen share

Meeting participants can request to remotely control the screen of the host or screen-sharer.

1. Click the **View options** dropdown while a screen is being shared, then select **Ask for remote control**.
- 2.

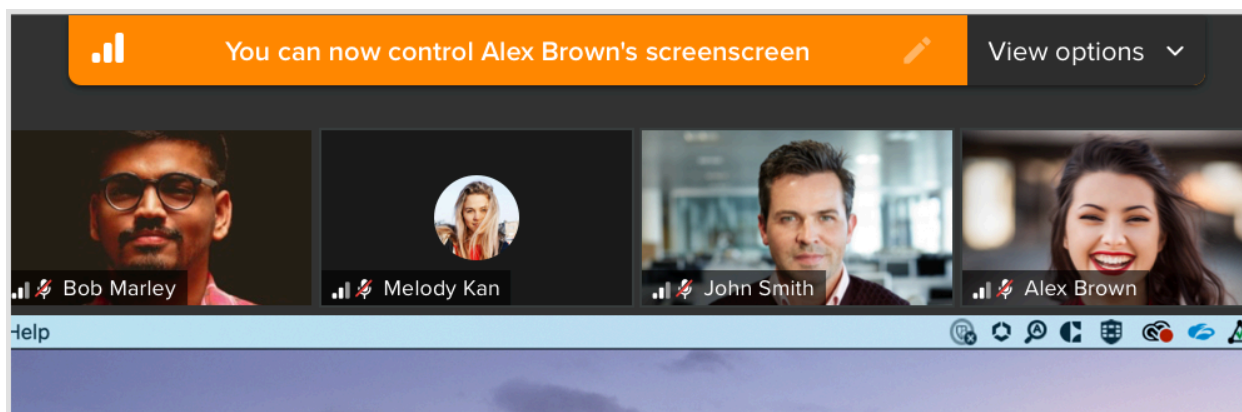


3. Click **Ask for control** to confirm.





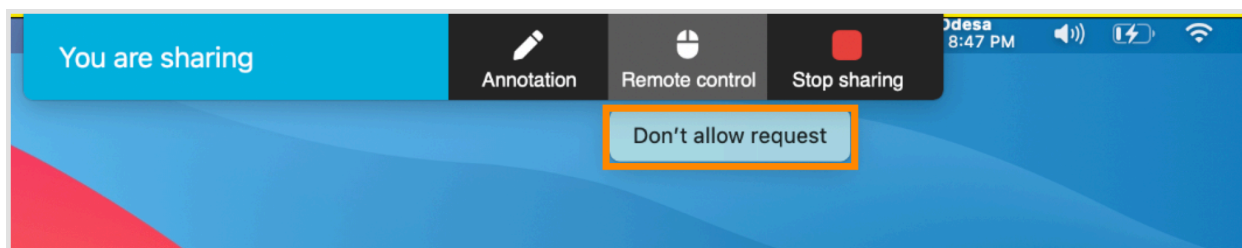
A notification at the top of the screen will appear when the presenter has given you access to their screen.



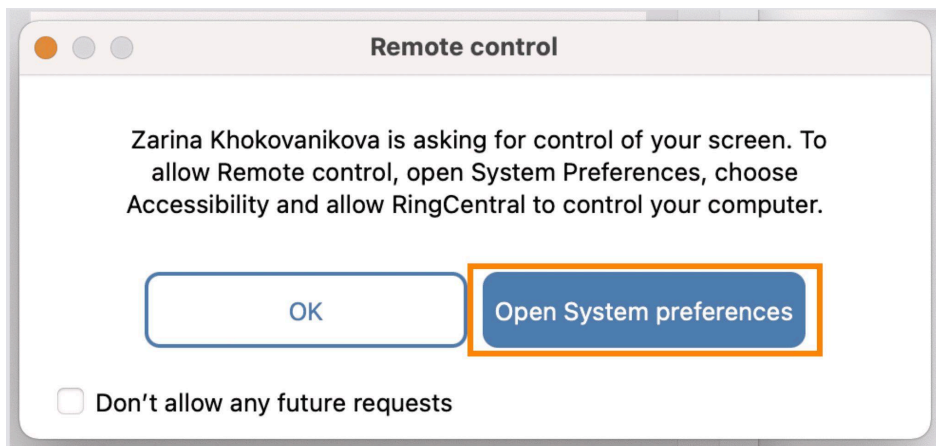
### Approving support remote desktop control during a screen share

A screen-sharer can set control access for their shared screen, and can also approve or deny any remote-control requests.

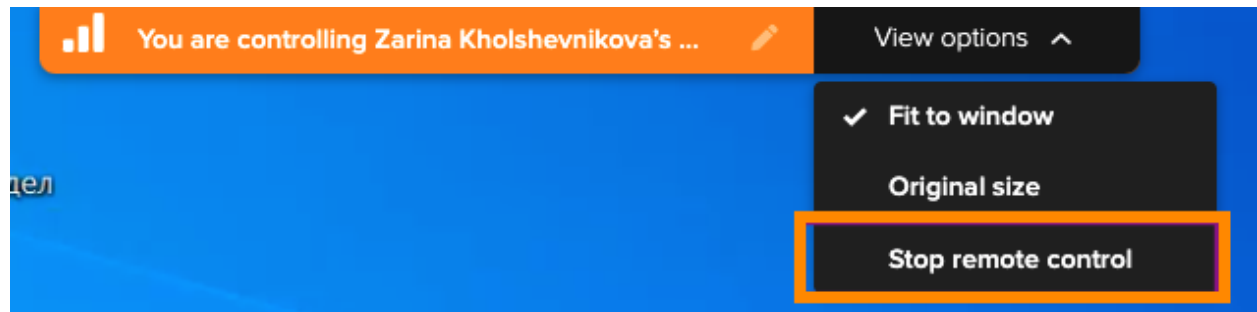
During a screen share, presenters can select **Don't allow requests** under **Remote control**.



When the presenter grants remote control to another participant, a popup window appears on the requester's screen. The requester can click **Open System Preferences** to accept remote control.



A notification at the top of the screen will appear on the requester's screen when granted access. The requester can stop the remote control anytime.



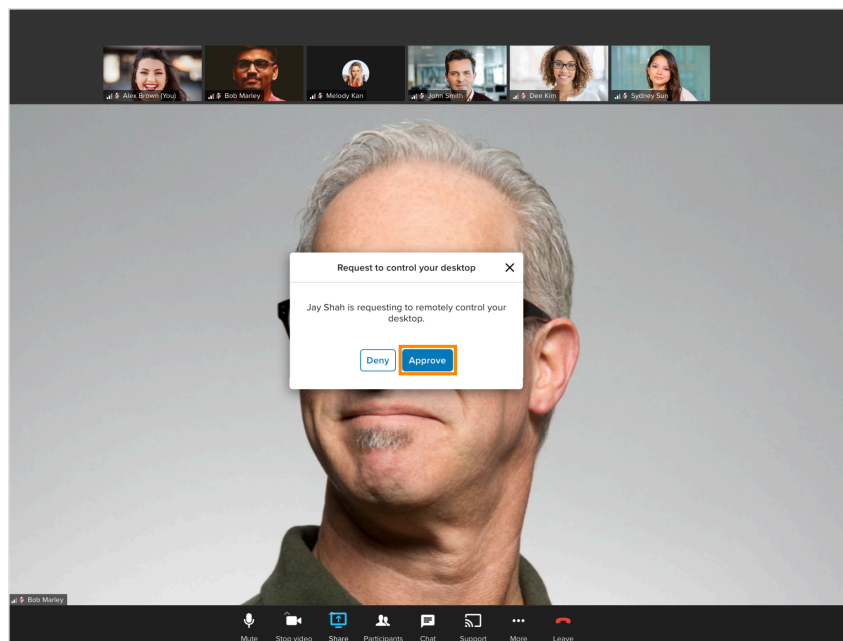
The presenter can temporarily take back control at any time by moving their mouse or typing.

The remote controller can also take back the control by moving their mouse or typing. If the presenter wants to end the remote control session, they can select **Remote Control > Stop remote control** from the sharing toolbar at any time.

## Approving support remote desktop control request

You will see a Request control popup window when a participant asks to control your desktop. You can approve or deny the request.

When a participant submits a desktop-control request to you, a **Request to control your desktop** popup window will appear in the middle of your screen. Click **Approve** on to give desktop access to the requester.



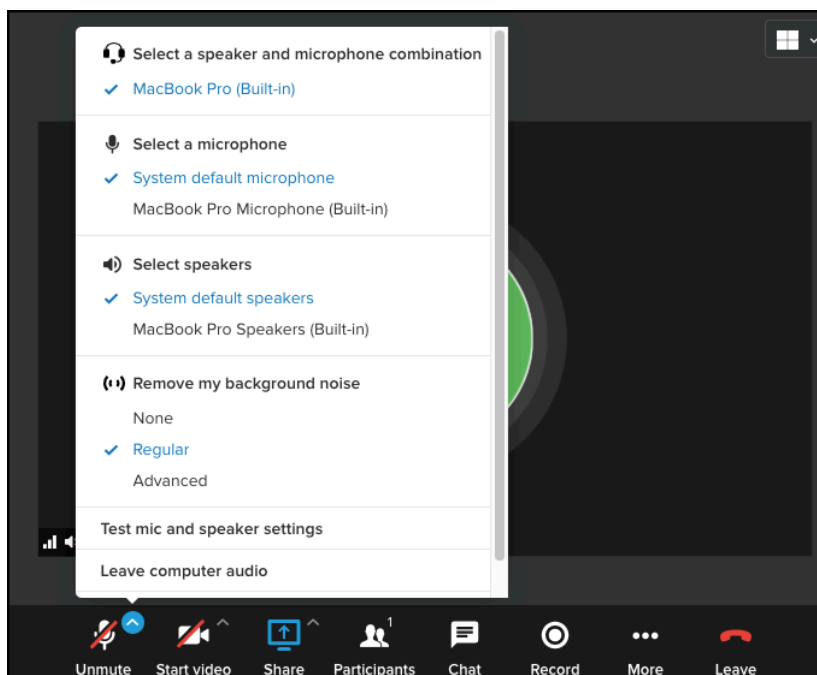
## Removing background noise during a RingCentral Video meeting

RingCentral background noise reduction is turned on at the Regular level by default and filters out constant sounds picked up by your microphone such as car noise, wind, or fans.

If you're in a meeting in a location with the potential for sharp sounds, such as a dog barking, or a baby crying, you can select the Advanced option.

### Using Remove my background noise

1. In a meeting, click the up-arrow next to Mute/Unmute microphone in the bottom menu.
2. Under Remove my background noise, select an option:
  - a. None: Turns off background noise reduction.
  - b. Regular: Removes constant background noise like cars or fans (default setting).
  - c. Advanced: Removes sharp noises such as typing, a car horn, or a dog barking.



#### Note:

- If you don't see background noise reduction in the menu, make sure you have the RingCentral app version 22.1.30 or later.
- If you selected the Advanced setting:
  - It will stay on for the duration of the meeting and will reset back to the default option (Regular) for your next meeting.
  - It will increase the CPU usage of the RingCentral app. If you notice signs of high CPU usage, like your voice sounding choppy to others, you might want to switch back to Regular.

- If your CPU usage gets too high, it will automatically switch to Regular, and you'll receive a warning pop-up message of this change.

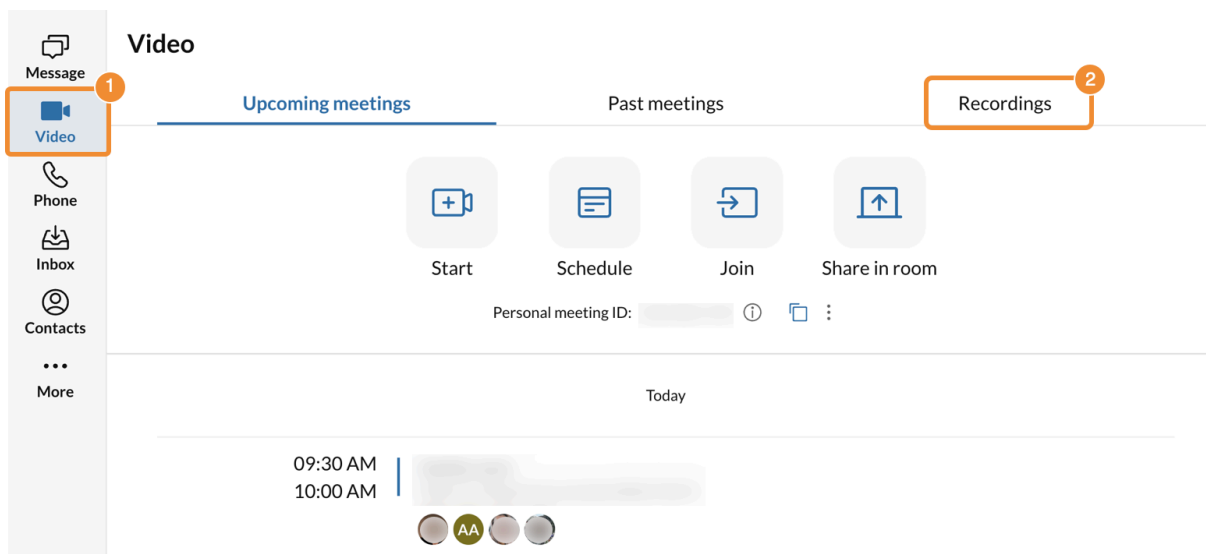
## Viewing and managing RingCentral Video meeting recordings

Once you record a RingCentral Video meeting, you can view, download, delete, or share the recording, as well as customize email notification settings. You can also manage a video highlights version of the recording, summaries, keywords, and transcripts—all generated by artificial intelligence (AI) technology.

### Viewing and managing meeting recordings from the recording overview

#### Finding the overview of a meeting recording

1. In the navigation bar, click **Video**.
2. Click **Recordings** at the top right.



3. To determine which recordings are displayed, click the dropdown below **Recordings** and select one of the following:
  - *All recordings*: All your meeting recordings.
  - *My recordings*: Meetings you recorded.
  - *Shared with me*: Meeting recordings shared with you.

### Viewing and managing recordings from the recording overview

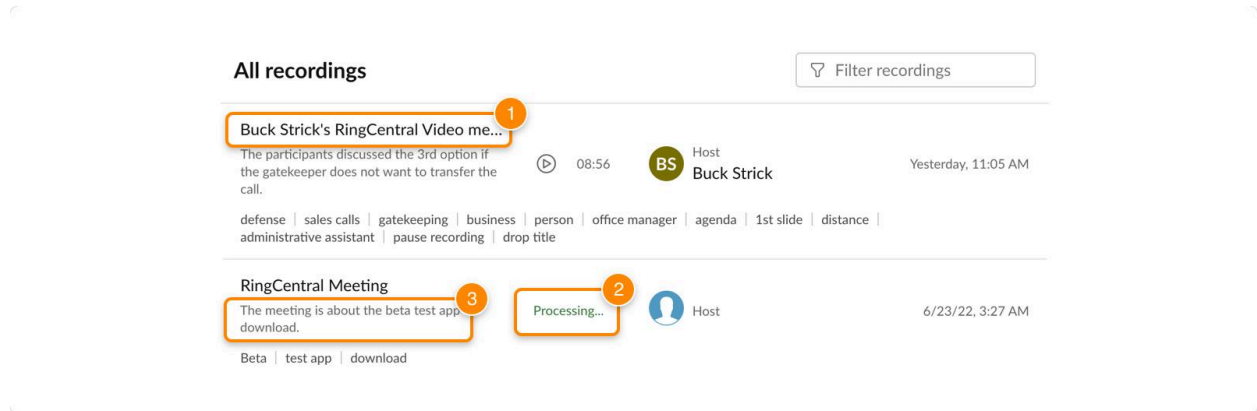
1. **View the meeting name:** This is created by the host when scheduling the meeting. Instant meetings or those without a unique name will appear as **RingCentral Video meeting**.

Note: A meeting's name can't be changed after the meeting starts.

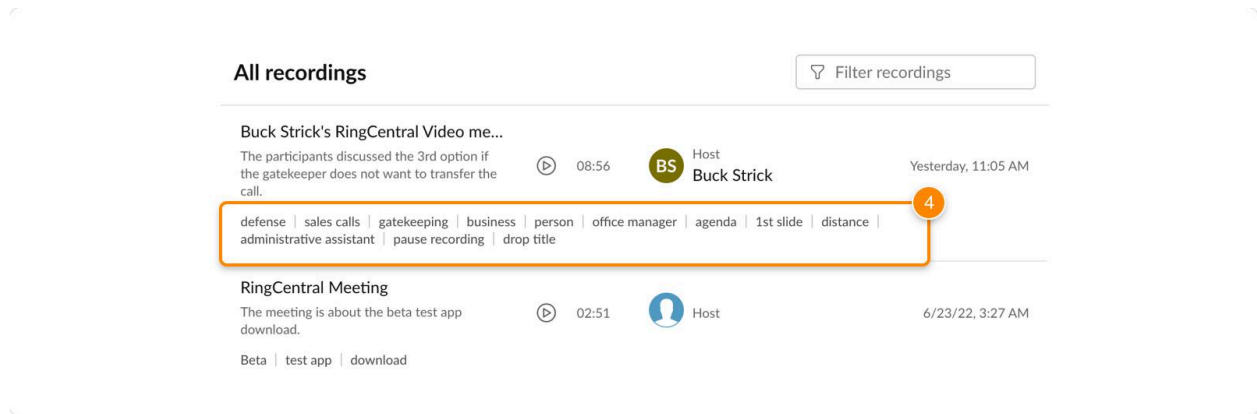
**2. Check the status and watch the recording:** To the right of the meeting name is a **Play** button or status message:

- *Play button:* Your recording is ready. Click to watch it.
- *Processing:* Your recording is still being created.
- *Failed:* Your recording wasn't successful.

**3. View a short AI-generated summary of the recorded meeting.**



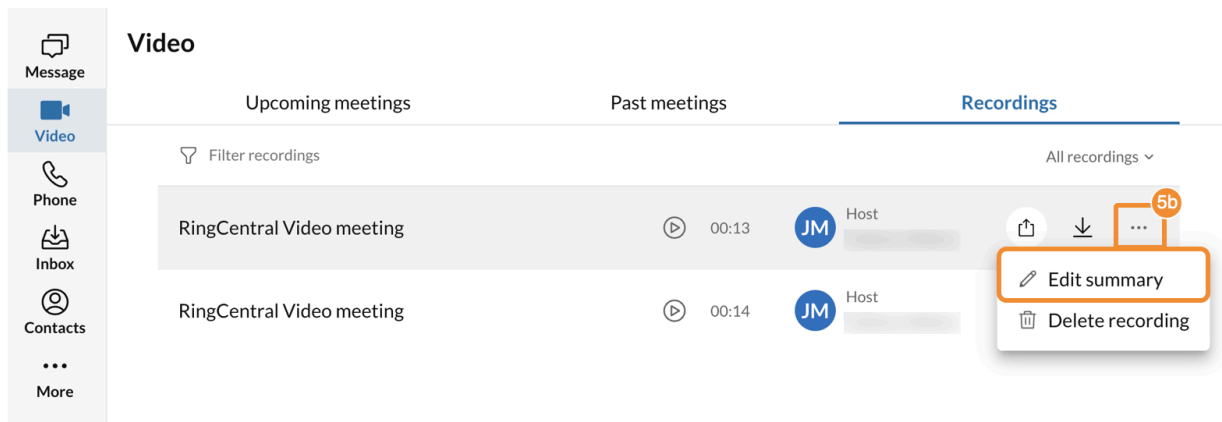
**4. View AI-generated keywords from the recorded meeting.**



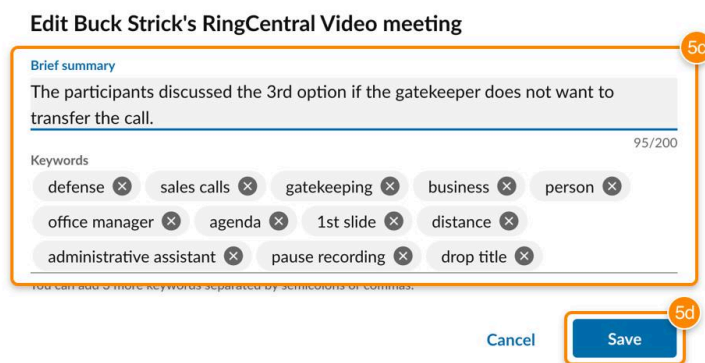
**5. Edit the AI-generated summary or keywords from the recorded meeting:**

- Hover over the recording overview.
- If you attended but didn't host the meeting, click the **Edit summary** icon on the far right. If you hosted the meeting, click the three-dot **More** icon on the far right, then click **Edit summary**.

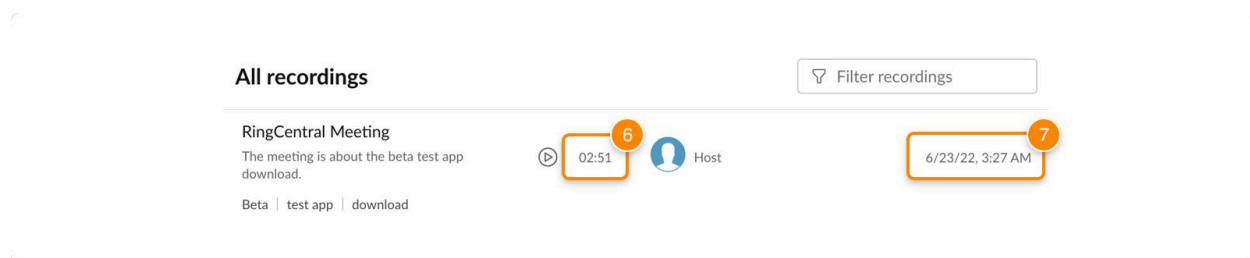
Note: If a recording of a meeting you *didn't attend* has been shared with you, you can't edit the summary.



- c. Edit the summary or keywords:
  - **To edit the summary:** Click the **Brief summary** field. You can enter up to 200 characters.
  - **To add or remove keywords:** Click the **Keywords** field. You can enter up to 15 keywords.
- d. Click **Save**.

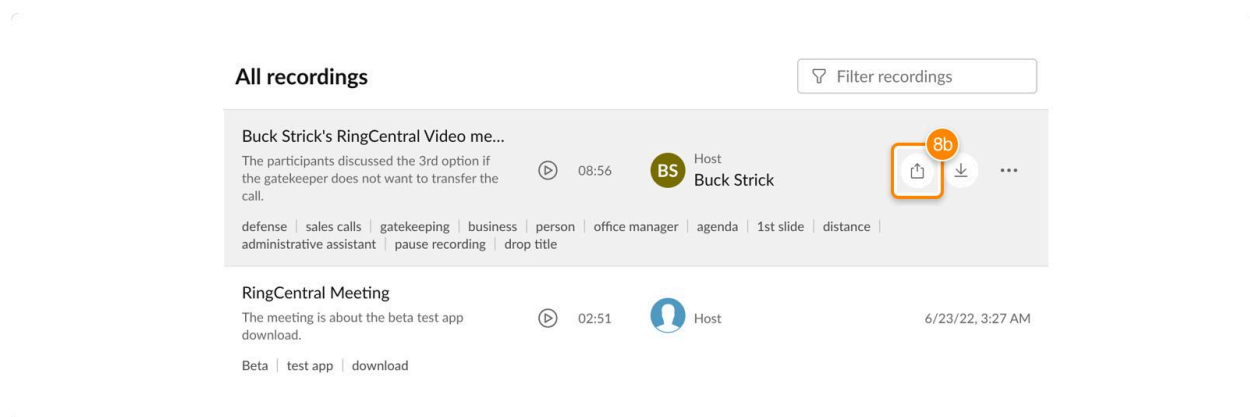


6. View the length of the recording.
7. View the date and starting time of the recorded meeting.



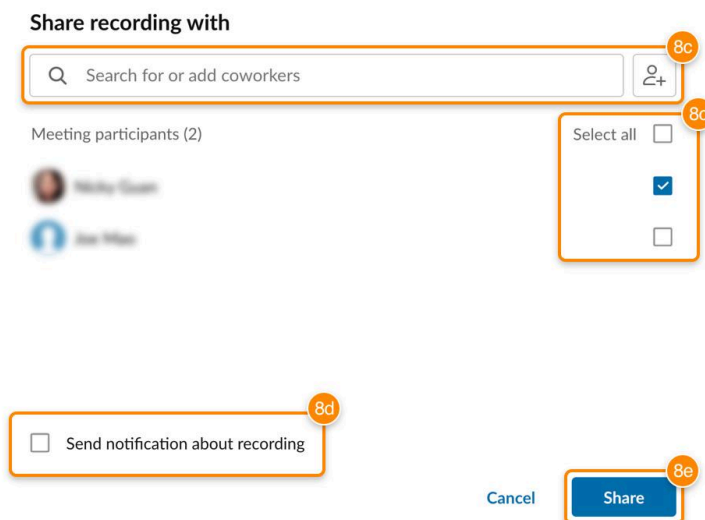
## 8. Share the recording with coworkers:

- Hover over the recording overview.
- Click the **Share recording** icon that appears at the far right.



- Select coworkers:
    - **To share with meeting participants**, do either of the following:
      - Check the box to the right of a person's name to share with individual participants.
      - Check **Select all** to share with all participants.
    - **To share with coworkers who weren't in the meeting**, do either of the following:
      - Begin entering a coworker's name in the search bar. When the name appears below, click **Add**.
      - Click the **Add coworkers** button to the right of the search bar. In the popup window, begin entering a coworker's name or email address, then click the name when it appears below. Click **Add**.
- Note: If the Share button isn't clickable, it means you've already shared the recording with the selected coworker(s).
- Check **Send notification about recording** if you'd like to send coworkers an email letting them know the recording was shared.
  - Click **Share**.
  - The recording is automatically added to the coworker's list of recordings, accessible by clicking **Video** in the navigation bar, then **Recordings** at the top of the page.

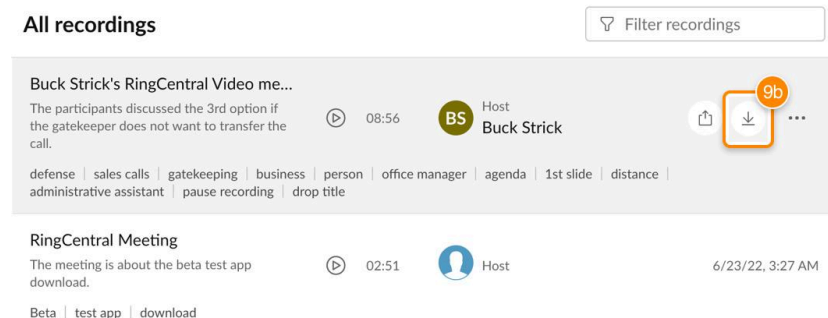




**Note:** You can only share recordings of meetings you host or instant meetings you initiate, and you can only share recordings with coworkers. To share recordings shared with you or share recordings outside your organization, you can download the recording (see below).

**9. Download the recording, meeting summary and highlights, or transcript:**

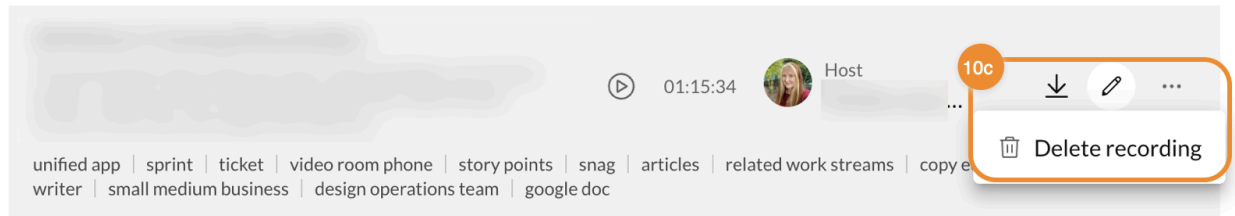
- a. Hover over the recording overview.
- b. Click the **Download** icon that appears at the far right.
- c. Select what you want to download:
  - *Recording:* An MP4 (video) file of your recording
  - *Summary & highlights:* A PDF file containing an AI-generated summary, highlights, and meeting keywords
  - *Transcript:* A PDF file containing a complete, AI-generated transcript of the meeting
- d. Look in your downloads folder or wherever your downloads usually appear.



Note: Downloading a recording allows you to share recordings that were shared with you or share recordings with people outside your organization. Simply send the MP4 file as an attachment using email or any messaging app.

#### 10. Delete the recording:

- a. Hover over the recording overview.
- b. Click the three-dot **More** icon that appears at the far right.
- c. Select **Delete recording**.
- d. Click **Delete** in the popup window to confirm.

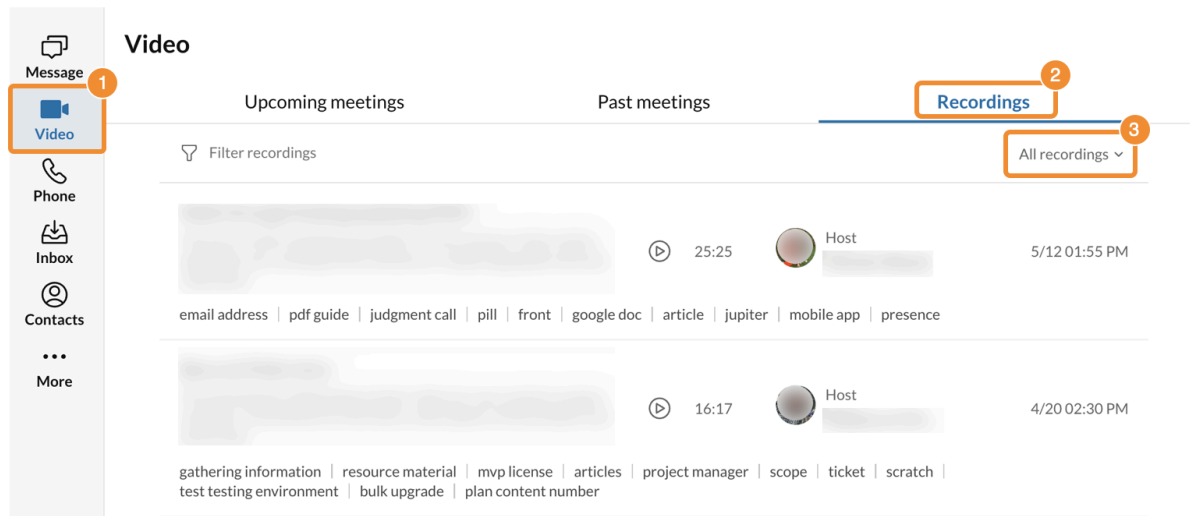


**Note:** Meeting recordings are stored for up to one year, depending on your service plan, then automatically deleted. [Learn more about RingCentral's data retention policies.](#)

## Viewing and managing meeting recordings from the recording detail window

### Finding the detail window for a meeting recording

1. In the navigation bar, click **Video**.
2. Click **Recordings** at the top right.
3. To determine which recordings are displayed, click the dropdown below **Recordings** and select one of the following:
  - *All recordings*: All your meeting recordings
  - *My recordings*: Meetings you recorded
  - *Shared with me*: Meeting recordings shared with you
4. Click anywhere on the recording overview to open the recording detail window.



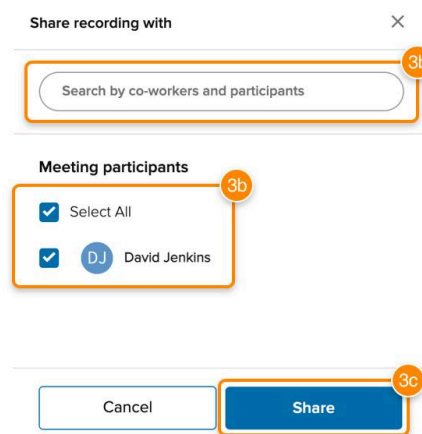
## Viewing and managing recordings from the detail window

1. **View the meeting name, date, time, and ID number:** This is created by the host when scheduling the meeting. Instant meetings or those without a unique name will appear as **RingCentral Video meeting**.  
Note: A meeting's name can't be changed after the meeting starts.
2. **Check the length of the full recording.**
3. **Share the recording with coworkers:**
  - a. Click **Share** at the top right.

Note: This will only appear for recordings of meetings you host or instant meetings you initiate.

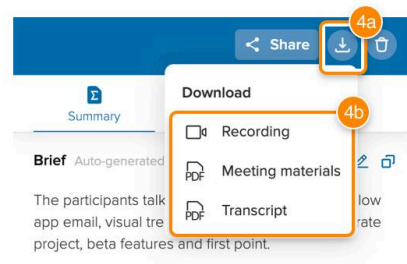


- b. Select coworkers by doing any of the following:
  - **To share with meeting participants:**
    - Check the box to the right of a person's name to share with individual participants.
    - Check **Select all** to share with all participants.
  - **To share with coworkers who weren't in the meeting:**
    - Begin entering a coworker's name in the search bar. Click the name when it appears below.
- Note: If the Share button isn't clickable, ~~it means~~ you've already shared the recording with the selected coworker(s).
- c. Click **Share**.
- d. The recording is automatically added to the coworker's list of recordings, accessible by clicking **Video** in the navigation bar, then **Recordings** at the top of the page.



#### 4. Download the recording, meeting summary and highlights, or transcript:

- a. Click the **Download** icon at the top right.
- b. Select what you want to download:
  - *Recording*: An MP4 (video) file of your recording
  - *Meeting materials*: A PDF file containing an AI-generated summary, highlights, and meeting keywords
  - *Transcript*: A PDF file containing a complete, AI-generated transcript of the meeting



- c. Look in your downloads folder or wherever your downloads usually appear.

Note: Downloading a recording allows you to share recordings that were shared with you or share recordings with people outside your organization. Simply send the MP4 file as an attachment using email or any messaging app.

#### 5. Delete the recording:

- a. Click the **Delete recording** icon at the top right.
- b. Click **Delete** in the popup window to confirm.



**Note:** Meeting recordings are stored for up to one year, depending on your service plan, then automatically deleted. [Learn more about RingCentral's data retention policies.](#)

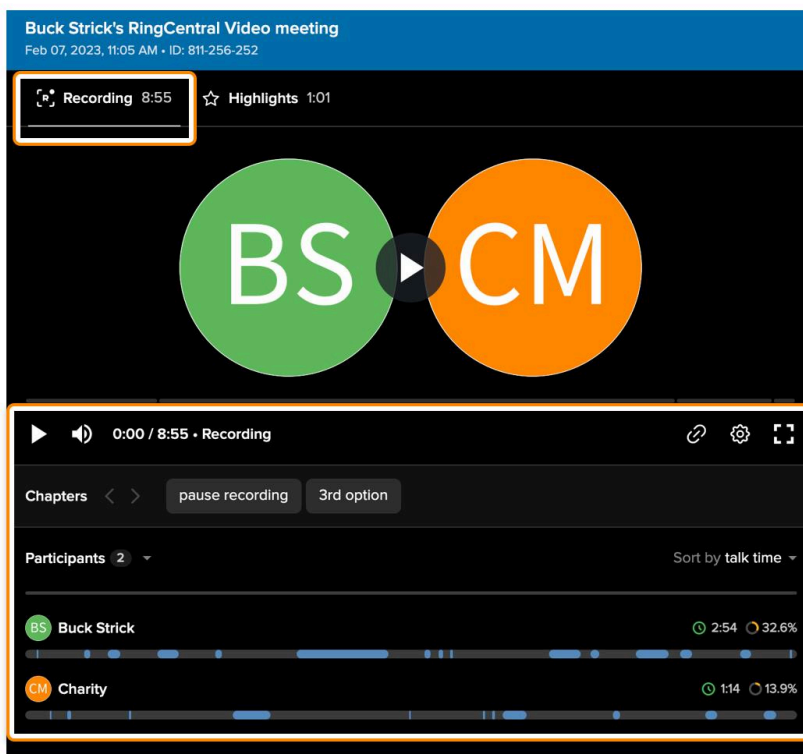
**6. Watch and manage the full recording:** Click the **Recording** tab to do the following:



- **Watch the full recording:** Click the **Play** button at the bottom left of the playback area.
- **Mute, unmute, and adjust the volume:**
  - **To mute or unmute:** Click the **Mute/Unmute** icon at the bottom left of the playback area.
  - **To adjust the volume:** Hover over the **Mute/Unmute** icon, then click and drag the slider that appears.
- **Share a link to the recording:** Click the **Share link** icon at the bottom right of the playback area. Under **Share link**, select either of the following:
  - *Copy the replay link:* Copies a link to the beginning of the recording.
  - *Copy the link at M:SS:* Copies a link to a specific time in the recording. After copying, paste the link into an email or text message to share with a coworker.

**Note:** A coworker can only access the recording using a shared link after you have first shared the recording directly using a Share button (see **3. Share the recording with coworkers** above).

- **Adjust the playback speed:** Click the **Settings** icon at the bottom right of the playback area, then select your desired speed.
- **Enter and exit full screen mode:** To enter, click the **Full screen** icon at the bottom right of the playback area. To exit, click the **Exit full screen** icon at the bottom right.
- **Jump to, or edit, AI-generated chapters of the recording** (for recordings longer than five minutes):
  - **To jump to a chapter:** Click the chapter name below the playback area, next to **Chapters**. You can also click the arrows to move forward or back through the chapters.
  - **To edit chapter names:** Hover over the chapter name, then click the **Edit** icon.
  - **To share a link to a chapter:** Hover over the chapter name, then click the **Copy chapter link** icon. Paste the link in an email or text message to share with a coworker.  
 Note: A coworker can only access the recording using a shared link after you have first shared the recording directly using a Share button (see **3. Share the recording with coworkers** above).
- **View a list of participants and select whose talk times are displayed:** Click **Participants**, then check the desired box(es).
- **Select how participants are organized:** Click the **Sort by** arrow then select *By talk time* or *By name*.
- **View each participant's talk time:** See *Total speaking time* on the left and *% of all speaking time* on the right.
- **Watch only the segments in which a particular participant is talking:** Hover over the profile picture to the left of the participant's name, then click the **Play** button that appears.



7. **Watch and manage the AI-edited video highlights version of your recording:** Click the **Highlights** tab to use the same functions described in step 6 above, but to watch and manage the video highlights version of the recording.



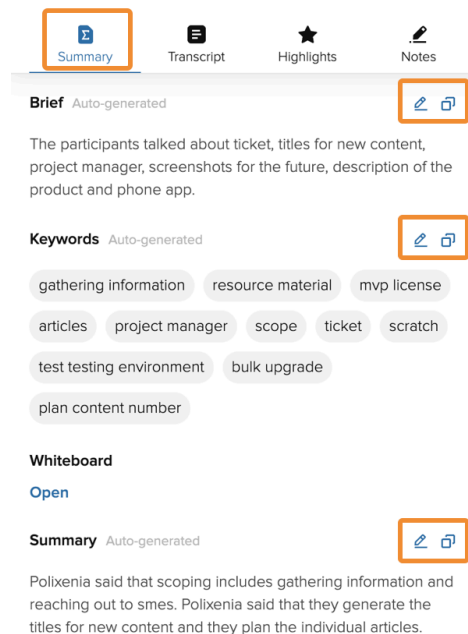
## Viewing and managing meeting materials from the right side of the recording detail window

The right side of the recording detail window lets you view and manage RingCentral Video meeting insights and other materials.

Meeting insights are generated using AI technology. They include a summary of the meeting, keywords, a transcript of the full recording, and video highlights with their associated transcripts. Other materials include the whiteboard and notes created by participants during the meeting.

1. **View and manage the AI-generated summaries and keywords:** Click the **Summary** tab at the top to do the following:
  - **Edit the summary, brief summary, or keywords:** Click the **Edit** icon at the right of *Brief*, *Keywords*, or *Summary*. In the popup window, click in the main field to edit, then click **Done**.  
Note: You can enter up to 200 characters for the brief summary, up to 10,000 characters for the summary, and up to 15 keywords.
  - **Copy the summary, brief summary, or keywords:** Click the **Copy** icon at the right of *Brief*, *Keywords*, or *Summary*.

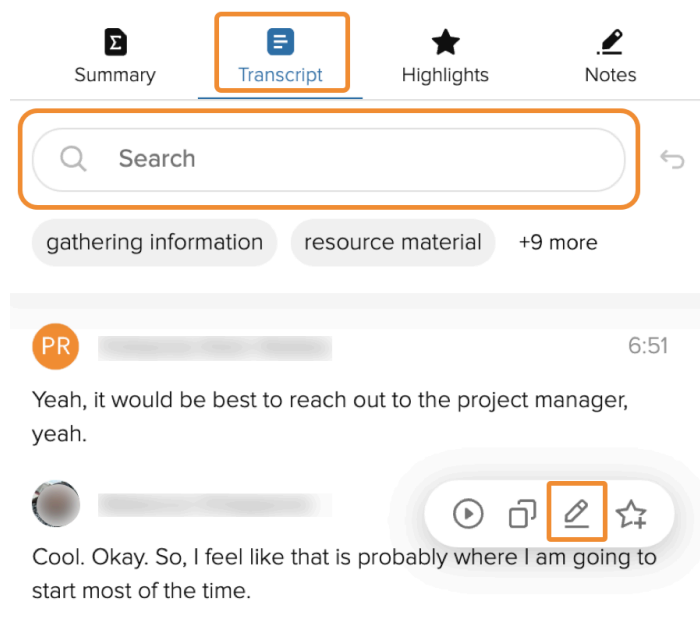


**Note:**

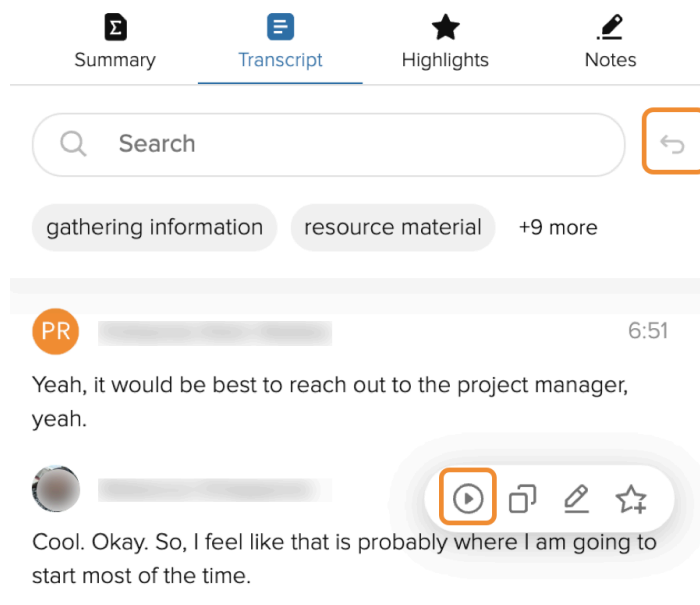
- Any coworkers whom the recording has been shared with can copy the summaries and keywords. Only meeting participants can edit them.
- Edits to the summaries or keywords appear for all coworkers the recording has been shared with.

2. **View and manage the AI-generated transcript of the full recording:** Click the **Transcript** tab at the top to do the following:

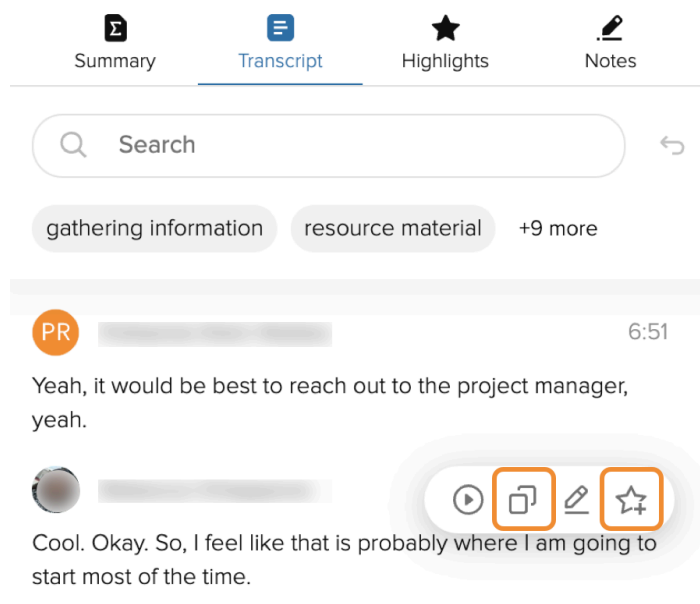
- **Search the transcript:** Click the search bar at the top, then enter a word or phrase. Click the arrows that appear below the search bar to move forward or back through the transcript highlighting each mention.
- **Edit the transcript:** Hover over the area of the transcript you'd like to edit. Click the **Edit** icon that appears at the right. In the popup window, click in the main field to edit, then click **Save changes**.



- **Revert to the original transcript after editing:** Click the **Revert to original transcript** icon to the right of the search bar at the top. Click **Revert** in the popup window to confirm.
- **Watch the recording along with the transcript starting at any point:** Hover over the transcript where you'd like to begin watching the recording. Click the **Play** button that appears at the right.

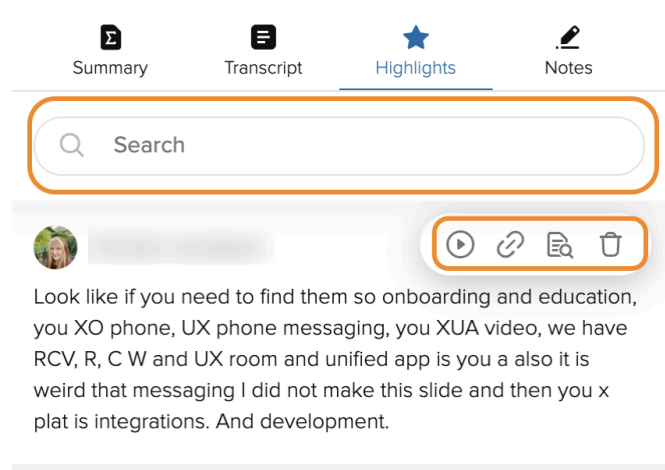


- **Add or remove text highlights from the transcript:**
  - **To add text highlights:** Use your cursor to select text. Click the **Create highlight** icon that appears.
  - **To remove text highlights:** Select only the currently highlighted text. Click the **Delete highlight** icon that appears, then click **Delete** in the popup window.
- **Copy from the transcript:** Use your cursor to select text, then click the **Copy** icon that appears.

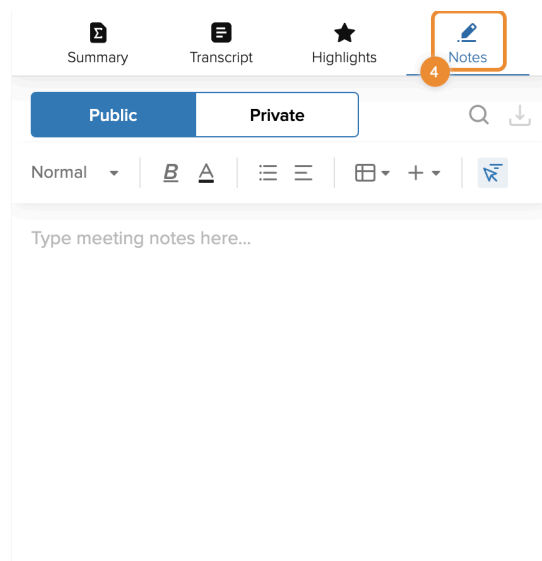


3. **View and manage AI-generated video highlights, and associated transcripts, from your recording:** Click the **Highlights** tab at the top to do the following:
  - **Search the transcript of video highlights:** Click the search bar at the top, then enter a word or phrase. Click the arrows that appear below the search bar to move forward or back through the transcript highlighting each mention.
  - **Watch video highlights:** Hover over the video highlight you'd like to watch. Click the **Replay highlight** icon that appears to the right.
  - **Share links to video highlights:** Hover over the video highlight you'd like to share. Click the **Copy highlight link** icon that appears at the right of it, then paste the link in an email or text to share it.  
 Note: A coworker can only access the recording using a shared link once you have first shared the recording directly using a Share button (see 3. **Share the recording with coworkers** under **Viewing and managing recordings from the detail window** above).
  - **Find a video highlight within the full transcript:** Hover over the video highlight you'd like to find. Click the **Find in transcript** icon that appears at the right of it.

- **Delete a video highlight:** Hover over the video highlight you'd like to delete. Click the **Delete highlight** icon that appears at the right of it. Click **Delete** in the popup window to confirm.



4. **View and manage the notes from the meeting:** Click the **Notes** tab at the top to do the following:



- **Select public or private notes:** Click **Public** to view and manage meeting notes visible to all participants. Click **Private** for your personal meeting notes visible only to you.
- **Search the notes:** Click the **Search** icon above the notes area, then enter a word or phrase. The searched words are highlighted.
- **Download the notes:** Click the **Download** icon above the notes area. This will download a PDF file containing all notes taken during the meeting.

- **Edit the notes:** Click anywhere within the notes.
- **Use formatting tools:** Use your cursor to select the text to format. Then, hover over any icon in the toolbar to display the tool's name and click to apply it.

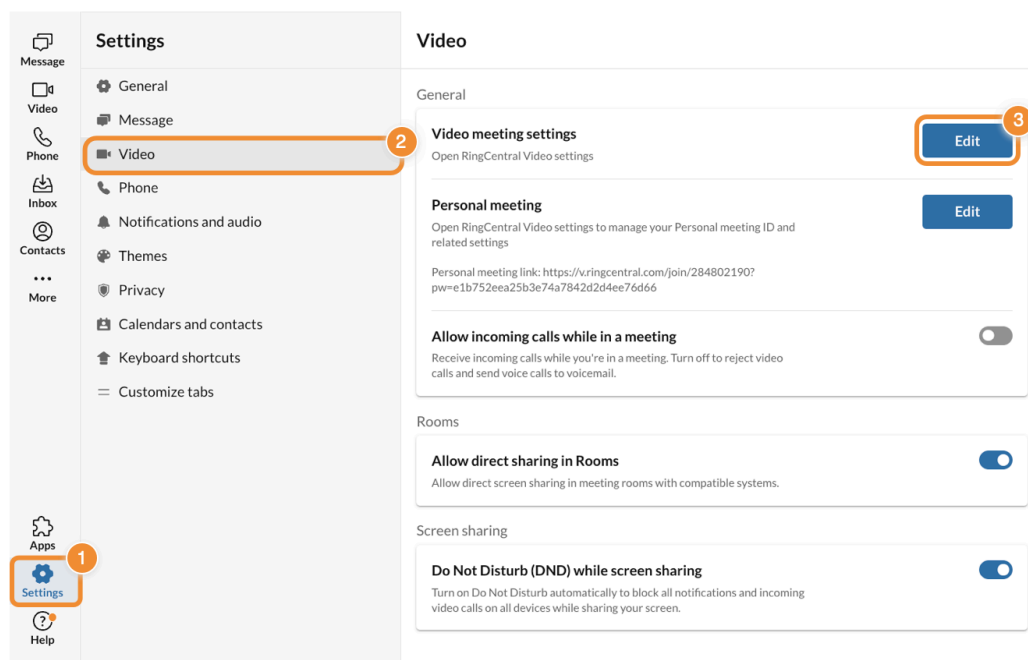
**5. View and manage the whiteboard from the meeting:** Click the **Summary** tab at the top, then click **Open** under Whiteboard. Use the tools and shortcuts to add text or sticky notes, erase, share the whiteboard, and more.

**Note:** Edits made to the public notes or whiteboard appear for all coworkers the recording has been shared with.

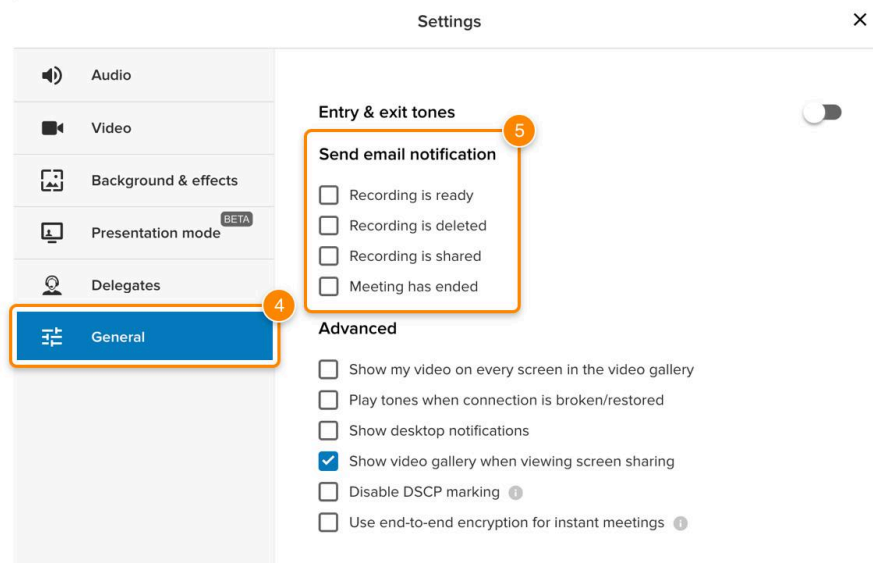
## Managing notification settings for meeting recordings

You can choose whether to receive email notifications when a recording is ready to view, has been deleted or shared, or when a meeting has ended.

1. In the navigation bar, click **Settings**.
2. Click **Video** in the left panel.
3. Click **Edit**.

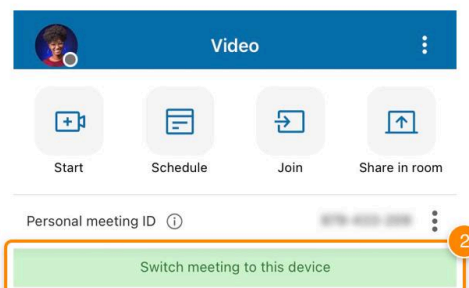


4. Click **General** in the popup window.
5. Under **Send email notification**, check the box(es) next to the events you want to be notified about: *Recording is ready*, *Recording is deleted*, *Recording is shared*, *Meeting has ended*.

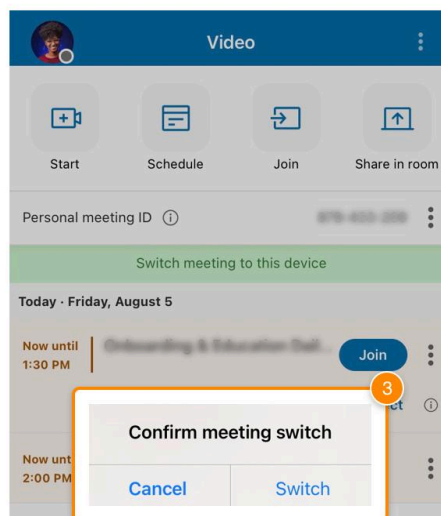


## Switching a RingCentral Video meeting from desktop to mobile

1. While you're in a meeting on your computer, open the RingCentral mobile app on your phone.
2. Tap **Switch meeting to this device** at the top of your screen.



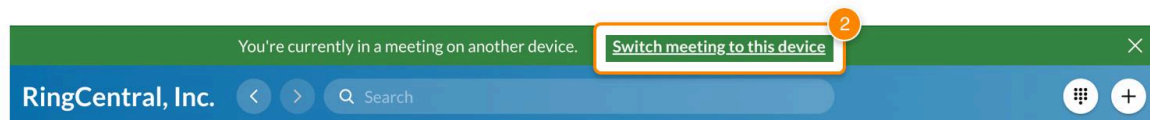
3. Tap Switch.



Note: This will open the meeting on your phone and close it on your computer.

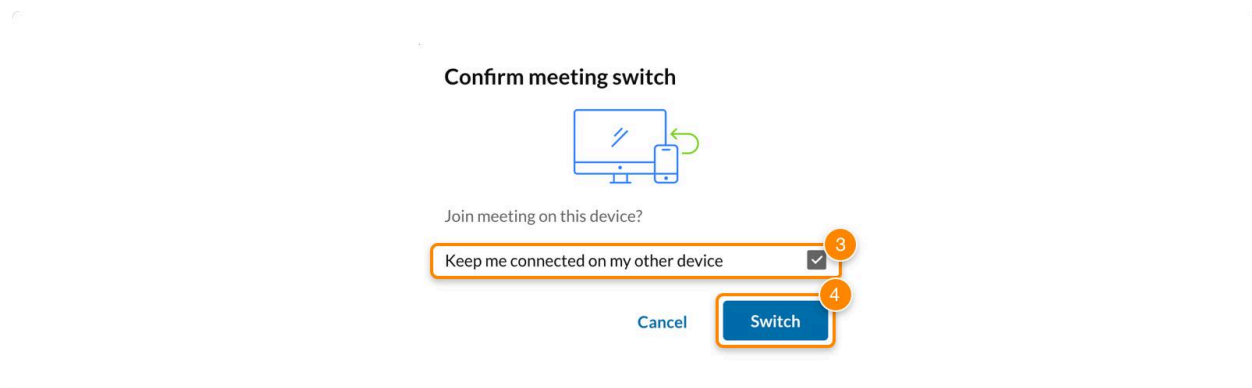
## Switching a RingCentral Video meeting from mobile to desktop

1. While you're in a meeting on the mobile app, open the RingCentral desktop app on your computer.
2. Click **Switch meeting to this device** in the green bar at the top of the screen.



3. Check the box for **Keep me connected on my other device** if you want to attend the meeting from both the mobile and desktop apps.

Note: If you choose this option, you'll need to leave the meeting from both apps when you finish.



4. Click **Switch**.

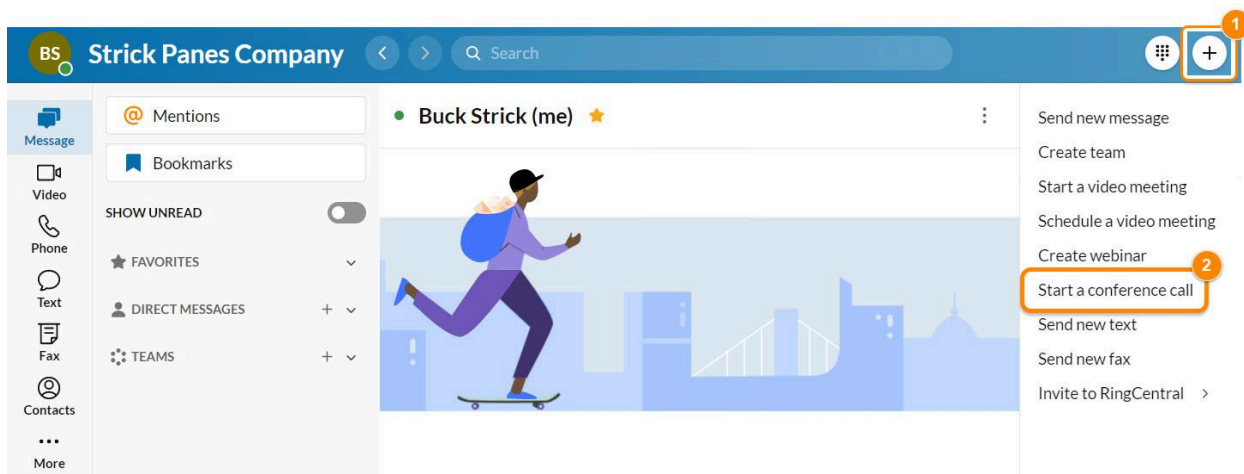
## Starting a conference call

The RingCentral app on your desktop or web browser lets you start a conference call with multiple participants.

You can start a conference call by clicking **Start conference call** anywhere you find it in the RingCentral app on your desktop or web browser.

### Starting a conference call using the new actions button

1. Click the **new actions (+)** button to the left of your profile picture in the upper right corner.
2. Select **Start a conference call**.





3. The **Conference call** window will show your conferencing information. Update your details if necessary.
  - a. **Dial-in number:** The number that participants use to dial in to the conference call. You can also include additional dial-in numbers.
  - b. **Allow participants to join before host:** If this is turned on, you'll allow participants to join the conference call before the host joins.
4. Click the **Invite** dropdown and choose how you'd like to invite participants.
  - a. **Invite by Text:** Send a text message from your RingCentral phone number. Search for a contact or enter a number, then click Send. Note: This option is only available to users with direct numbers or [DigitalLines](#).
  - b. **Invite by Email:** Open your synced email account with an email that includes your conference call information filled in automatically. Add contacts, then send the email as you normally would.
  - c. **Invite by Message:** Send a direct message using the RingCentral app on your desktop or web browser. Enter your contacts' names or email addresses, then click Send.
5. Click **Start conference**.

**Conference call**

Dial-in number  
 United States, Philadelphia, PA (US) 717 555-4567

Include additional dial-in numbers  
 Enter number

Host access 594670876

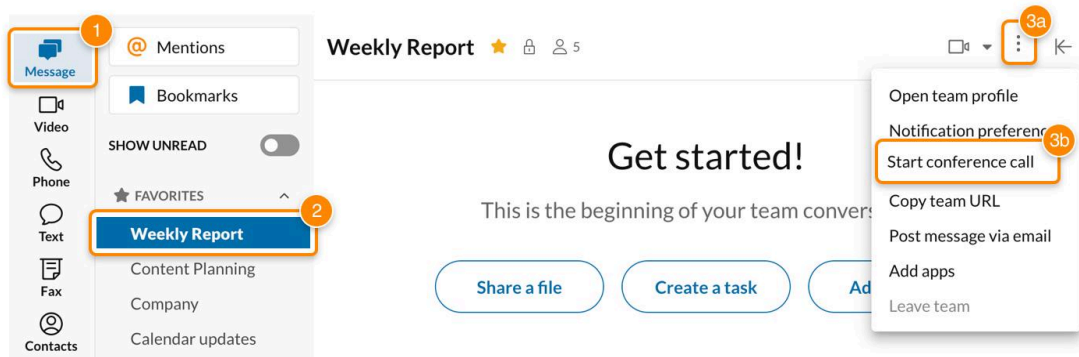
Participant access 259709090

Allow participants to join before host ☒

Cancel Invite Start conference

## Starting a conference call from Message

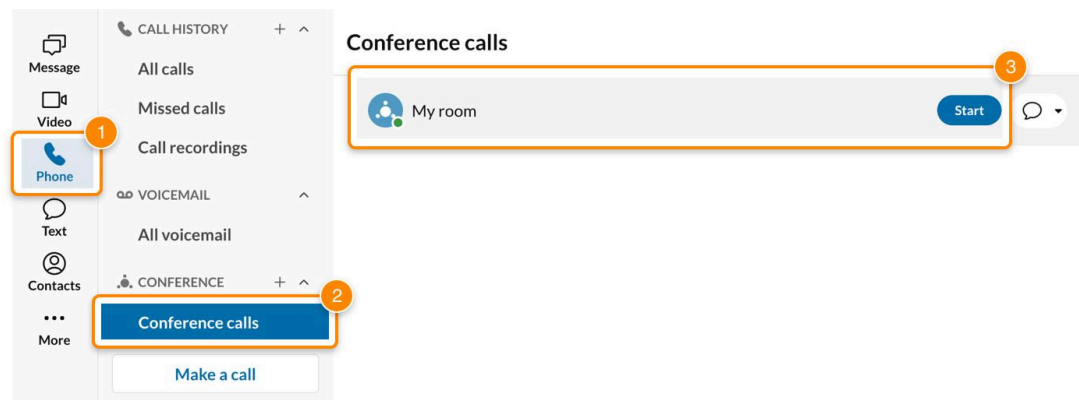
1. Go to **Message** in the left navigation bar.
2. Select a group or team conversation.
3. Click the **More** icon at the top right of the main panel, then select **Start conference call**.



4. Click **Start**. The dialpad will automatically open, and your conference call will begin.

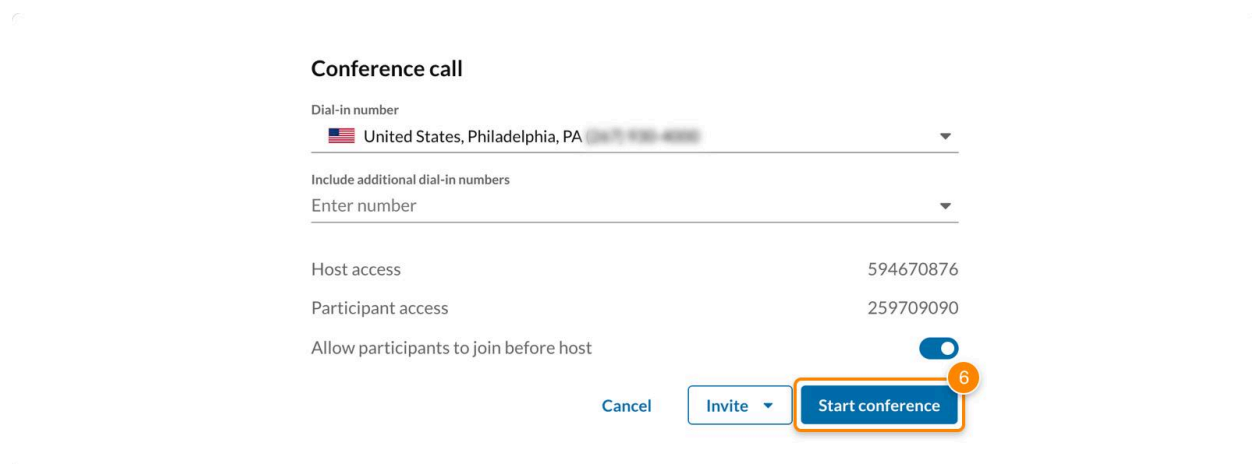
## Starting a conference call from Phone

1. Go to **Phone** in the left navigation bar.
2. Click **Conference calls**.
3. Click **My room** to view your conferencing information.



4. Update your details if necessary.
  - a. **Dial-in number:** The number that participants use to dial in to the conference call. You can also include additional numbers.
  - b. **Allow participants to join before host:** If this is turned on, you'll allow participants to join the conference call before the host joins.
5. Click the **Invite** dropdown and choose how you'd like to invite participants.
  - a. **Invite by Text:** Send a text message from your RingCentral phone number. Search for a contact or enter a number, then click **Send**. Note: This option is only available to users with direct numbers or [DigitalLines](#).
  - b. **Invite by Email:** Open your synced email account with an email that includes your conference call information filled in automatically. Add contacts, then send the email as you normally would.

- c. **Invite by Message:** Send a direct message using the RingCentral app on your desktop or web browser. Enter your contacts' names or email addresses, then click **Send**.
6. Click **Start conference**.



## Starting a conference call on behalf of another user

You can start a conference call on behalf of another user only if they've turned on [delegate permissions](#).

1. Go to **Phone** in the left navigation bar.
2. Click **Conference calls**.
3. Hover over the name of the conference room you'd like to use.
4. Click **Start a conference on behalf of**.

## Using the Phone menu

### 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.

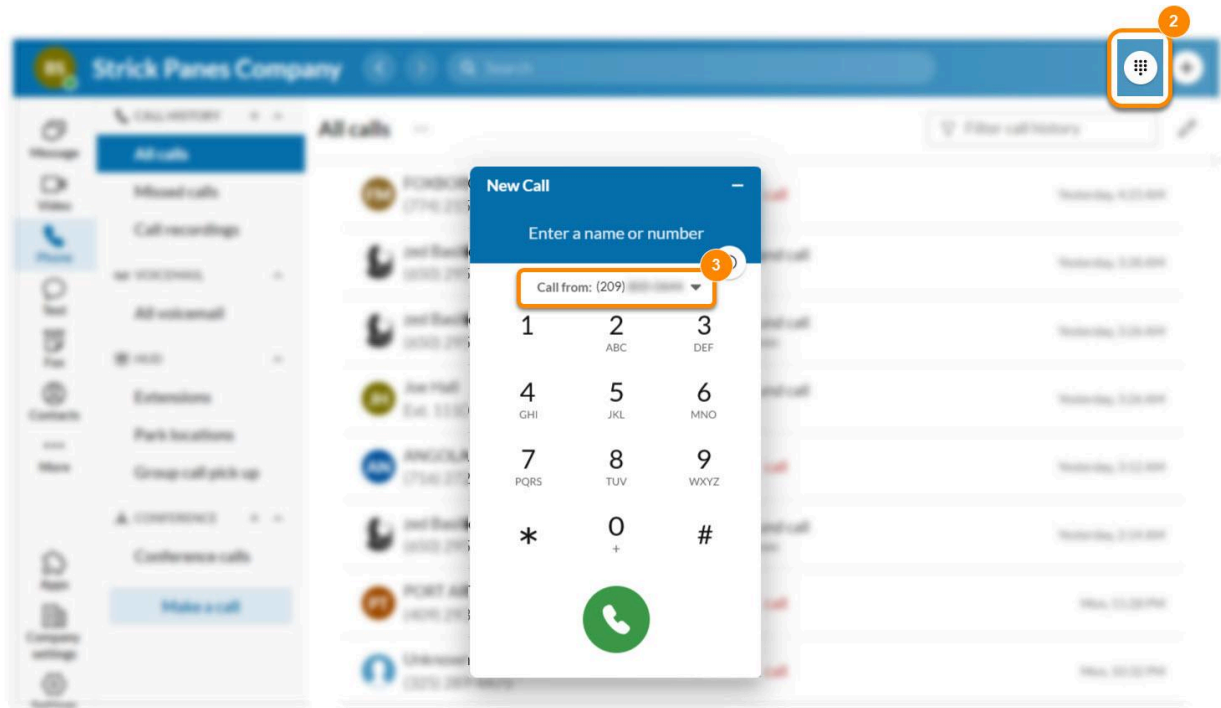
There are several ways you can make a call in the RingCentral app. You can start a call via the following methods:

- Selecting the Dialpad 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 dialpad:

1. Navigate to the **Phone** menu via the side menu bar.
2. Click the **Dialpad** 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 dialpad 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 dialpad to dial a number
    - i. Click the green button at the bottom to start the call

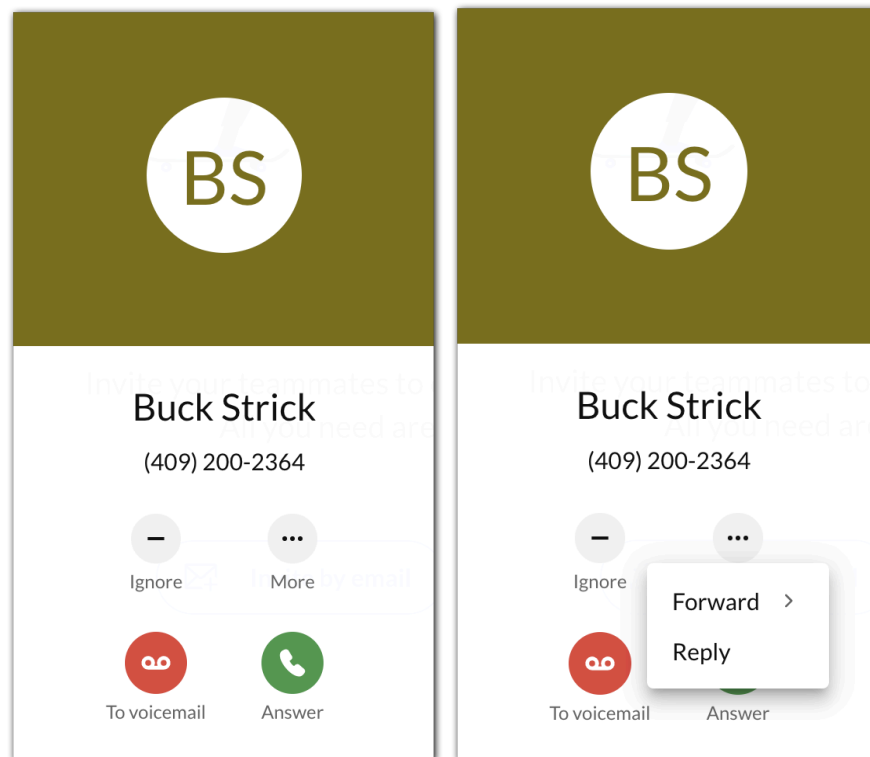
Note: Users need to dial 10 digits (**area code + telephone number**) to complete local calls in the United States.

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](#).

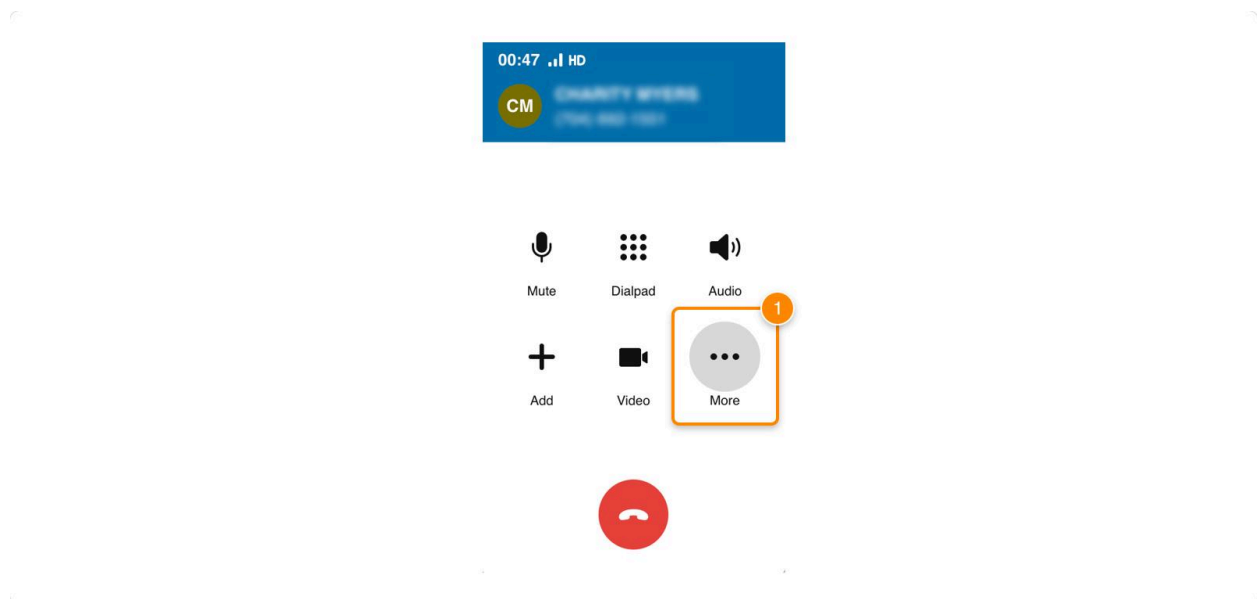
## Transferring a call

You can transfer a live call to any number. When transferring a call, you'll have three options:

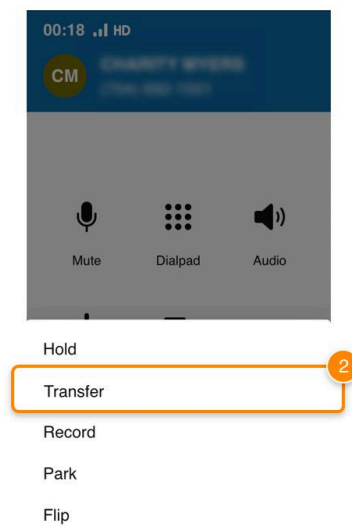
1. Before transferring, you can contact the person who will receive the call. This is known as a warm transfer.
2. You can transfer without speaking to the person receiving the call. This is known as a cold transfer.
3. You can transfer directly to someone's voicemail.

### Warm transferring a call

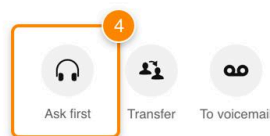
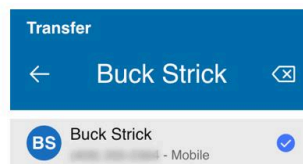
1. While on a live call, click the **More** button.



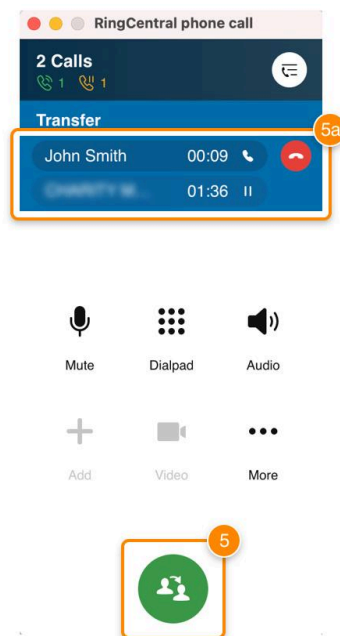
2. Select **Transfer**.



3. Enter a name or number in the field, or enter a number using the dialpad.
4. Click **Ask first** at the bottom.

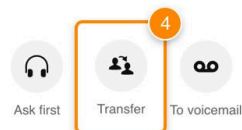
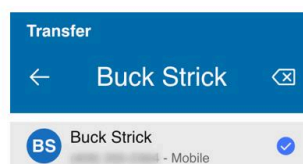


5. Once you've spoken to the person receiving the transfer, click the **Complete transfer** button at the bottom.
  - a. You can speak to each person involved before completing the transfer. While on a call, click the label for the person on hold to switch to that call. This will put the other caller on hold until you switch back.



## Cold transferring a call

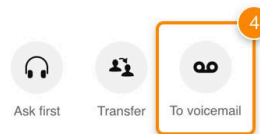
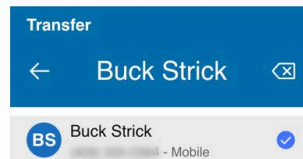
1. While on a live call, click the **More** button.
2. Select **Transfer**.
3. Enter a name or number in the field, or enter a number using the dialpad.
4. Click **Transfer** at the bottom.





## Transferring a call to voicemail

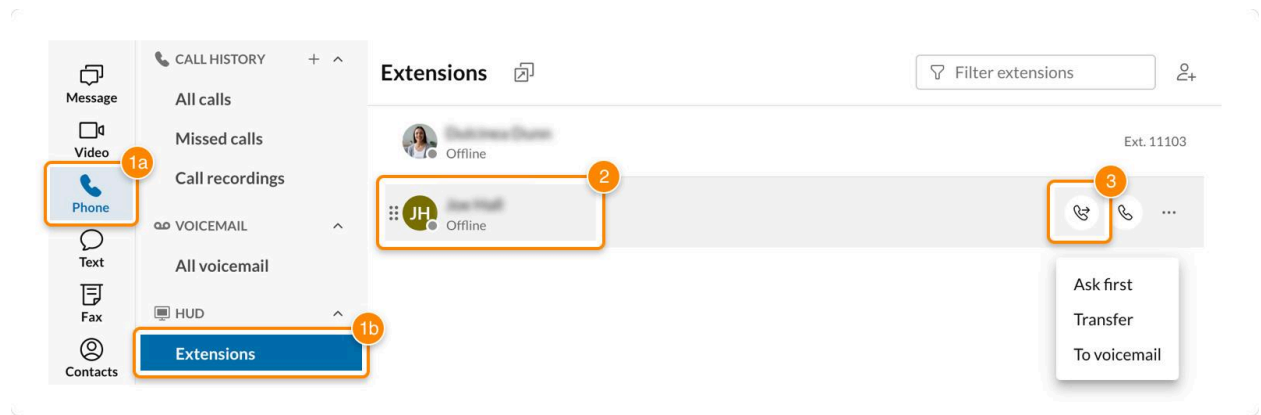
1. While on a live call, click the **More** button.
2. Select **Transfer**.
3. Enter a name or number in the field, or enter a number using the dialpad.
4. Click **To voicemail** at the bottom to send the call directly to the selected person's voicemail.



## Transferring calls using Heads-up display (HUD)

Note: To transfer calls using HUD, make sure you have [turned on HUD in the RingCentral app](#) on your desktop or web browser.

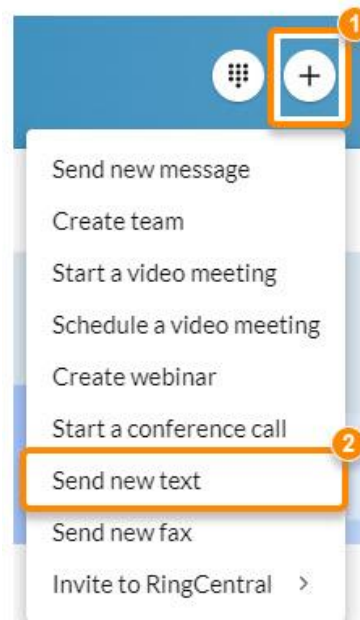
1. While on a live call, click **Phone** in the left navigation bar, then click Extensions.
2. Hover over the user you'd like to transfer the call to.
3. Click the **Transfer** icon, then select from the following:
  - a. *Ask first*: Talk to the person you'd like to transfer the call to before you make the transfer. When ready, click **Transfer**.
  - b. *Transfer*: Automatically transfers the call to the selected extension.
  - c. *To voicemail*: Transfers the call directly to the selected extension's voicemail.



## Sending a text message

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

1. Click the **New actions (+)** button in the top right.
2. Select *Send new text* from the dropdown.



3. If you've been assigned more than one caller ID, click the **Text from** field to select which caller ID you'd like to use to send your message.
4. Enter the name or phone number of the recipient in the **To** field.
5. Click **Next** to open the conversation.
6. Type your message at the bottom.
  - Click the **Emoji** icon to include emojis.

- Click the paper clip icon to attach files, such as documents and images.
- 7. Certain settings determine how you can send a text message. Click **Settings** in the left navigation bar, then click **Keyboard shortcuts**. Note the toggle next to **Send message using Enter/Return key**.
  - If **Send message using Enter/Return key** is turned on: You can send your text message by pressing Enter or Return on your keyboard or clicking the **Send** button to the right of the message. Pressing Shift+Enter/Return adds a new line break.
  - If **Send message using Enter/Return key** is turned off: You can send your text message by pressing Shift+Enter/Return on your keyboard or clicking the **Send** button to the right of the message. Pressing Enter or Return adds a new line break.

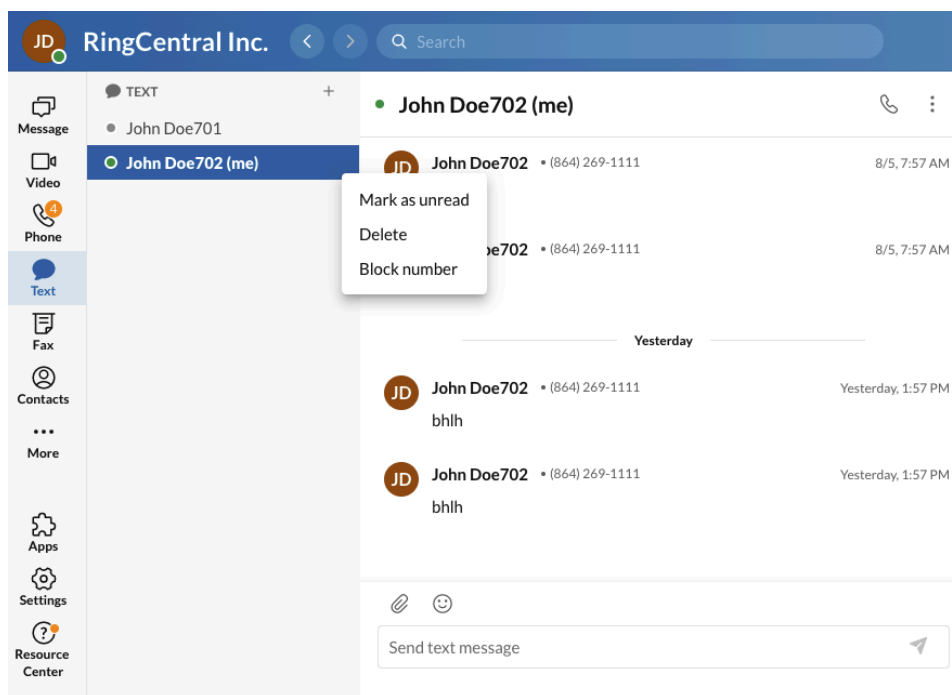
Note: **Send message using Enter/Return key** is turned on by default.

To learn more, read [Sending and viewing text messages in the RingCentral app for desktop and web](#).

## Marking a text message as unread

You can mark a text message as unread.

1. Go to **Text** in the app and select the text message.
2. Click **More (three horizontal dots)**.
3. Select **Mark as unread**.



## Configuring phone settings

On the Phone settings page, you can configure your default outbound Caller ID, country code, and area code formatting from the phone settings in the RingCentral app. You can also update your local emergency address if you need to contact emergency services.

If you want to improve the quality of your calls, you can use Citrix with the RingCentral web app. To learn more, visit [Using Citrix VDI integration in the RingCentral desktop and web](#).

To access your phone settings, select the Settings gear icon in the left navigation bar of the RingCentral app, and then click Phone from the left pane.

## Incoming calls settings

- **Call handling:** Ring numbers sequentially or in a fixed order. You can add other phones like a mobile phone to receive calls when you don't answer your primary phone.
- **Voicemail:** Configure voicemail settings such as voicemail rules when a call is not answered and your voicemail greeting type. You can also record your greeting and set up a voicemail PIN.
- **Ringtone:** Select the sound you'll hear when you receive incoming calls.
- **Volume:** The app will let you know when the volume is set to 0, meaning you can't hear the caller but they can hear you.
- **Ring versus answer:** Launch an external app or website for incoming calls and choose between 'ring' and 'answer'

See [Setting up user call forwarding in the RingCentral app desktop and web](#) and [Setting up your voicemail in the RingCentral app desktop and web](#) to learn more.

## Outgoing calls settings

- **Caller ID:** Select your default Caller ID for outbound calls. When making or taking a call, you will see both the number used to call your extension, along with the number you set up for placing or receiving calls.
- **RingOut:** Use any phone to make a call with your RingCentral account and Caller ID. Click Manage to configure your RingOut number and confirm connection before your RingOut call.

## General settings

- **Extension settings:** Allows you to configure your extension settings. Click Edit to be redirected to the extension settings on your RingCentral online account, where you can update call routing, voicemail greeting, and more.
- **Head-up display:** Toggle on to enable the head-up display (HUD) feature in the RingCentral app. The HUD also lets you see user extensions in real-time, whether available or engaged in a call. Click Manage to enable or disable notifications when someone you are monitoring receives a call.
- **Default phone app for calling:** Select which app you'd like to use to make calls in this section. From the dropdown menu, select either Use RingCentral (this app) or Use RingCentral Phone. Note: RingCentral Phone is a stand-alone app, and selecting this option will prevent calls from ringing in the RingCentral app.

- **Region:** Lets you set the default country and area code for your region. This will be used for phone number formatting and local and emergency dialing. Click Edit to set your Country and Area code on the popup window, and click Save to confirm changes.
- **Emergency location:** Lets you update your physical address on record with RingCentral for emergency calls. Click Edit to update, then click Confirm location to save.
- [Use RingCentral for click to dial and fax](#): Allows you to select the RingCentral app as the default app to open when clicking on any telephone number. This setting is only available in the RingCentral desktop app.
- [Use standalone window for phone calls](#): Allows you to handle calls in a standalone call window separate from the main app. Click Manage to enable or disable Always keep the phone call window in front. When you search for a person to call, their presence will show up next to their name in the results.
- **Bring app to front:** Automatically move the RingCentral app to the front when you have an incoming call.
- **Launch an external app or a URL for Incoming calls:** Your calls will automatically open an external app or URL when enabled.
- **Updates:** App will display a banner warning to users who need to update their app. Click the banner message to get the latest version.

## 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:

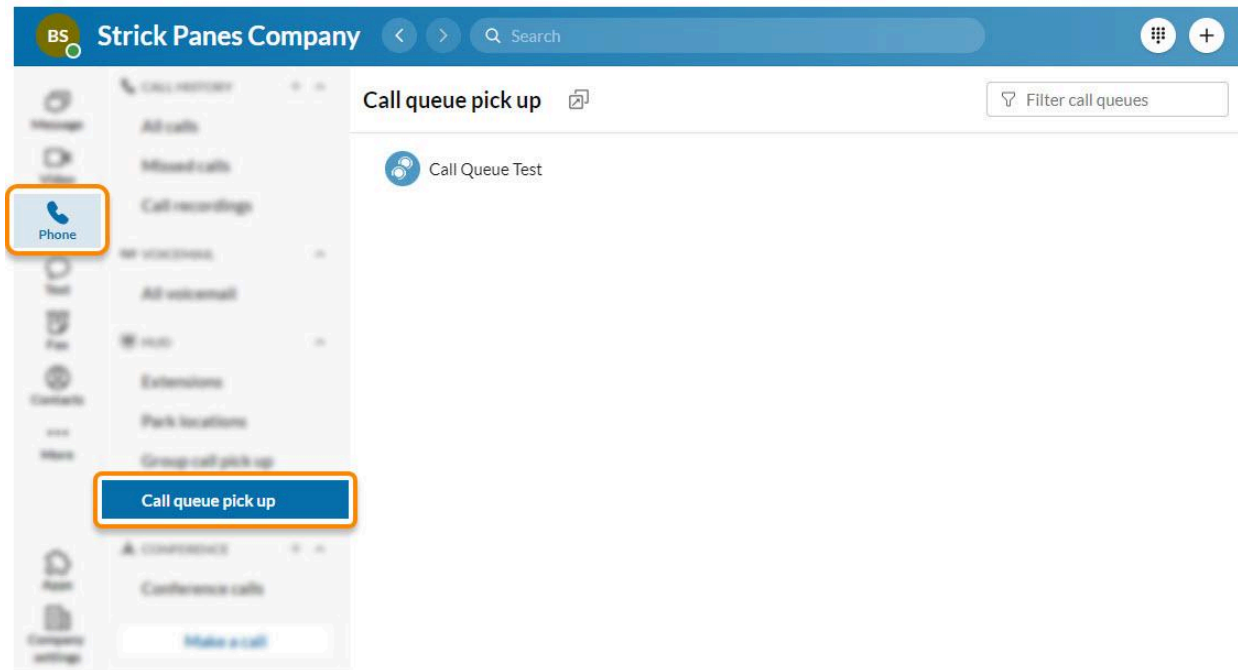
- **Extensions:** View user extensions.
- **Conference rooms:** View delegated calls.
- **Delegated calls:** Join or make a conference call.
- **Parked locations:** View parked calls.

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

### Using Call Queue Pickup via the HUD

The **Call Queue Pickup** feature allows calls waiting in a call queue to be answered by pickup group members rather than waiting for the primary agents. The **Call queue pick up** tab will automatically appear in your HUD section if you have it configured in your RingCentral online account.

1. Go to **Phone** via the left navigation bar.
2. Click **Call queue pick up**.



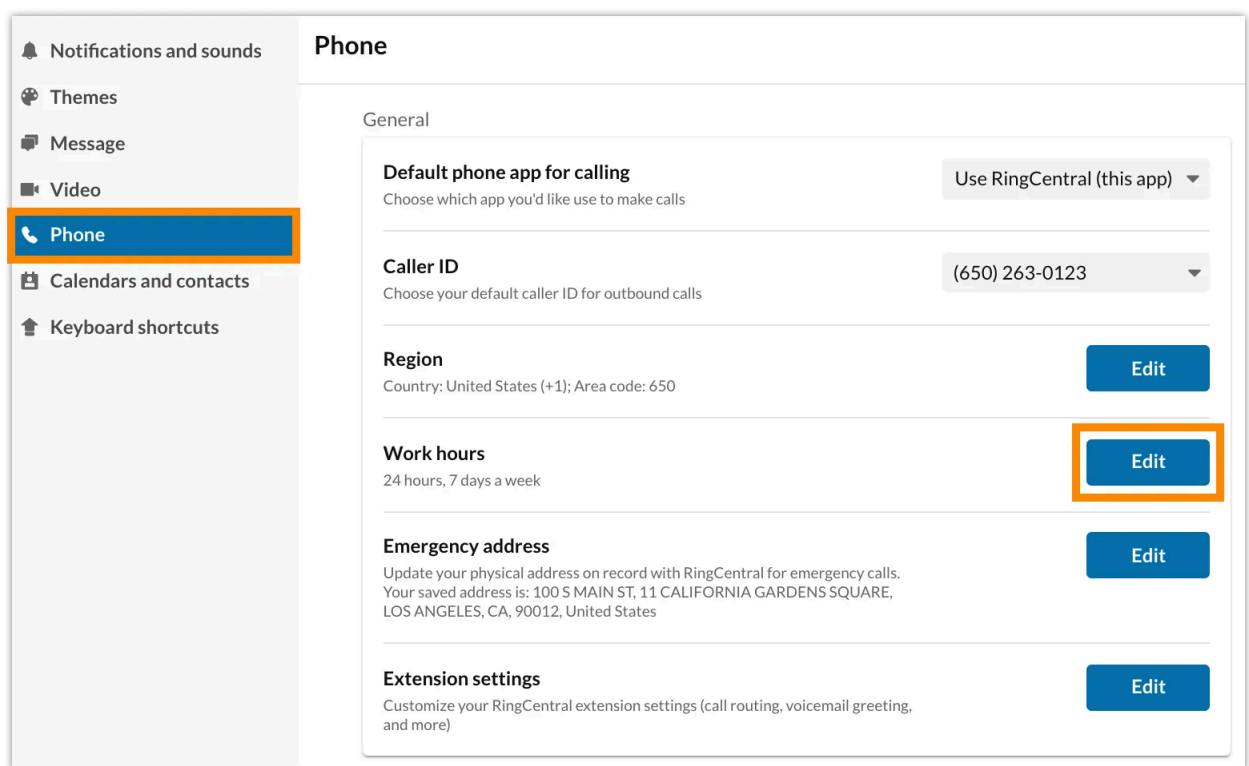
3. Click **Answer** to pick up a call from your call queue pickup groups.

## 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 **General**, click the **Edit** button for **Work hours**.
4. Select *Specific work schedule*.



5. Set your **Time zone** from the dropdown list.



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

### Work hours

What are your work hours?

☐ Always available (24/7)
 ☒ Specific work schedule






---

Time zone

(GMT-08:00) Pacific Time (US & Canada) ▼

---

What is your schedule?

Sunday	Closed ▼			
Monday	9:00 AM ▼	To	6:00 PM ▼	 <a href="#">Apply to</a>
Tuesday	9:00 AM ▼	To	6:00 PM ▼	 <a href="#">Apply to</a>
Wednesday	9:00 AM ▼	To	6:00 PM ▼	 <a href="#">Apply to</a>
Thursday	9:00 AM ▼	To	6:00 PM ▼	 <a href="#">Apply to</a>
Friday	9:00 AM ▼	To	6:00 PM ▼	 <a href="#">Apply to</a>

[Cancel](#)
[Save](#)

- Click **Apply to** at far right of the schedule you want to copy to Weekdays or All days (optional).
- 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 RingEX and Video plans](#) to learn more about different plans.

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

- Click **Save**.

### Call forwarding

Route incoming business calls to any of your devices and apps or forward calls to another number.

Work hours

After hours

Ring order

☐ Simultaneous
 ☒ Fixed order

Name		Ring for	
Primary phone	Desktop and mobile apps	0 secs	<input checked="" type="checkbox"/>
<div>⋮</div> Name Home	Number (650) 486-9692	Ring for 20 secs	<div>⋮</div> <input checked="" type="checkbox"/>
<div>⋮</div> Name Mobile	Number (205) 419-3471	Ring for 20 secs	<div>⋮</div> <input checked="" type="checkbox"/>
<div>⋮</div> Name Work	Number (650) 486-5555	Ring for 20 secs	<div>⋮</div> <input checked="" type="checkbox"/>
<div>⋮</div> Name 1319's device	Number (650) 516-3510	Ring for 20 secs	<div>⋮</div> <input type="checkbox"/>

+

 Add another phone

Cancel

Save

## Setting up user call forwarding in Phone settings

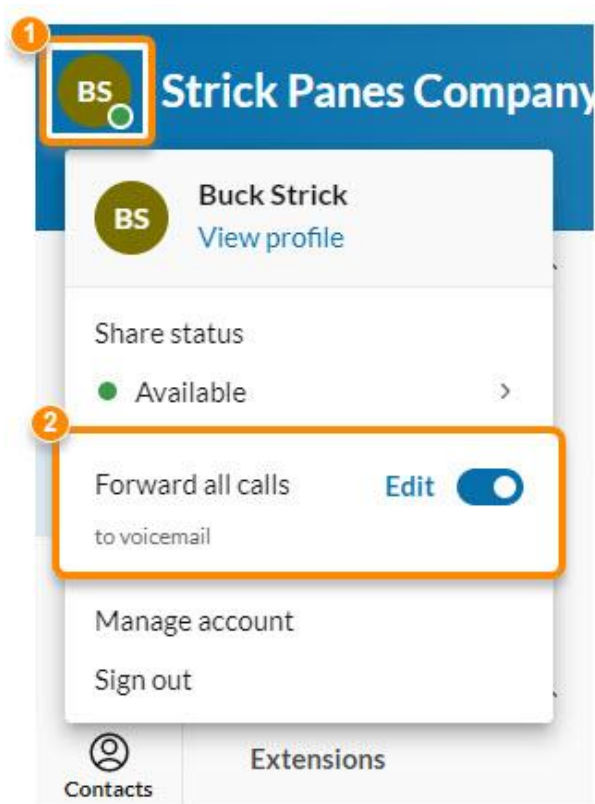
- Navigate to **Settings** via the left-hand navigation bar.
- Select **Phone** on the left pane.
- Scroll down to **Incoming calls**.
- Click the **Edit** button at the far right of **Call forwarding** to open the Call forwarding window.
- Configure the length of ring time for each forwarding number.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

## Setting up the Forward all calls feature

The RingCentral app's **Forward all calls** feature allows you to forward all your incoming calls when you're unable to answer. You can forward incoming calls to a voicemail, coworker, external number, call queue, announcement, IVR menu, or other locations. You can also specify the date and time when your calls will be forwarded.

Admins can set the **Forward all calls** feature for users.

1. Click your profile photo at the top right of the RingCentral app for desktop or web.
2. Turn on the toggle for **Forward all calls**.



3. Click the **Forward to** dropdown, and select [where you want to forward your calls](#). Click **Show more options** to see the complete list.
4. Set dates and/or times for call forwarding to start and end (optional). This feature is useful for forwarding calls around your break or vacation schedule.
5. Click **Save**.

**Forward all calls**

Forward to

- Voicemail
- Coworker
- External number
- Announcement
- Show more options

Start date	Start time	End date	End time
06/15/2022	22:00	06/16/2022	22:00

(GMT-08:00) Pacific Time (US & Canada)

Cancel Save

A banner will appear at the top of the RingCentral app to remind you when your calls are forwarded. You can click Edit to modify your call forwarding settings, or click Turn off to stop forwarding your calls.

## Where to forward your calls

- **Voicemail:** Forward calls to your voicemail box. You can play and customize your voicemail greeting.
- **Coworker:** Forward calls to a coworker. Type the coworker's name or extension number in the search box, then click on the desired coworker.
- **External number:** Forward calls to an external number, such as an answering service.
- **Announcement:** Play an announcement. You can play and customize the greeting.
- **Call queue:** Forward calls to a call queue. Type the call queue name or extension number in the search box, then click on the desired call queue.
- **Delegated line:** Forward calls to a delegated line. Type the delegated line name or extension number in the search box, then click on the desired delegated line.
- **Shared line:** Forward calls to a shared line. Type the shared line name or extension number in the search box, then click on the desired shared line.
- **Limited extension:** Forward calls to a limited extension. Type the limited extension name or extension number in the search box, then click on the desired limited extension.
- **IVR menu:** Forward calls to an IVR menu. Type the IVR menu name or extension number in the search box, then click on the IVR menu line.

Note:

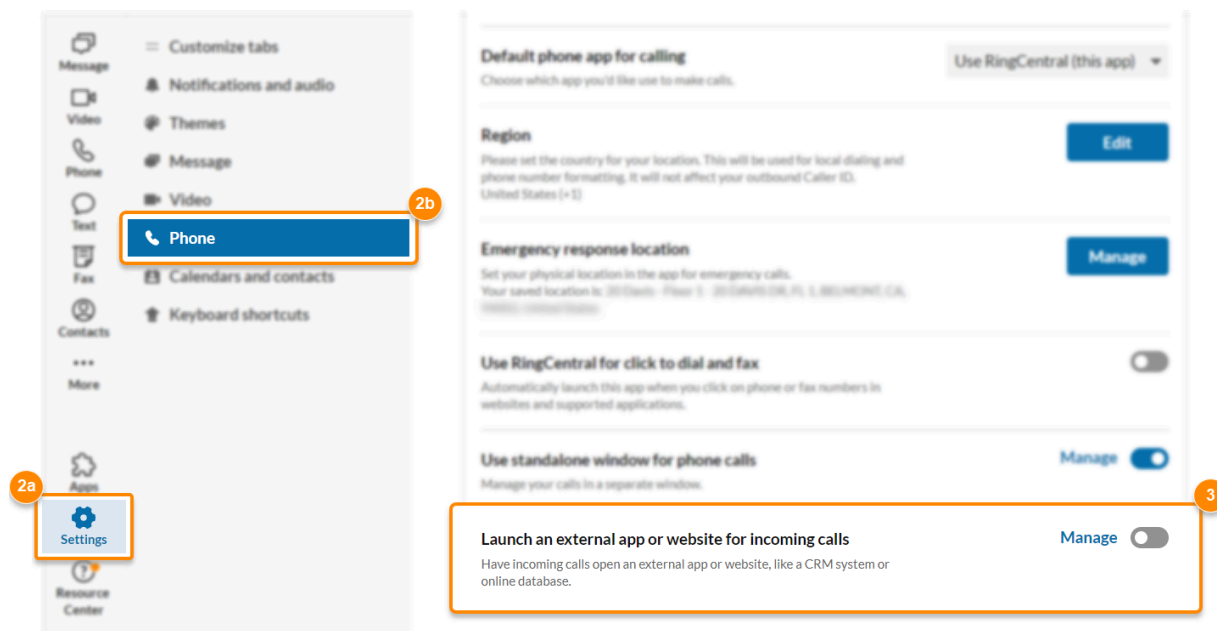
- To use the **Forward all calls** feature, the **User Settings - Call handling** permission is required. If a user doesn't have this required permission, the Forward all calls feature won't be available to them. For more information, go to [List of User Permissions](#).
- When **Forward all calls** and Do Not Disturb (DND) are both turned on, calls will be forwarded according to your **Forward all calls** settings.

## 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

1. In the RingCentral desktop or web app, click **Settings** in the left navigation bar.
2. Go to **Phone > General**, then scroll down.
3. Next to *Launch an external app or website for incoming calls*, slide the toggle to enable. The **Manage external apps or URLs for incoming calls** window will appear.



4. Click the *Launch an external app or website when* dropdown to select the situation in which you want to launch a specific app or website:
  - a. **A call begins to ring:** The specified website or app will launch as soon as the call arrives.
  - b. **A call is answered:** The specified website or app will launch after you answer the call.
5. Enter a URL in the *Enter command* field or click the Browse icon to choose an application. Enter the supported parameters at the end of the path or URL, as needed. Read more about [using parameters](#).
6. Click the **Test** button to confirm the command or behavior you've set up.
7. Click **Save**.

### Manage external apps or URLs for incoming calls

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

4 Launch an external app or website when  
A call begins to ring

5 Enter command

6 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: <ul style="list-style-type: none"><li>Launch URL <code>http://www.mysite.com/myintegration.htm?number=%P</code> This example launches a browser, opens a webpage, and passes the caller's phone number details.</li><li>Launch app <code>/myfolder/myapp "%P" "%N"</code> This example opens an application on your computer and passes the caller's phone number and full name to the app.</li></ul>
%C	Full canonical format: +1 (650) 555-4092
%E	E164 phone number: +16505554092
%%	%symbol

7

Cancel Save

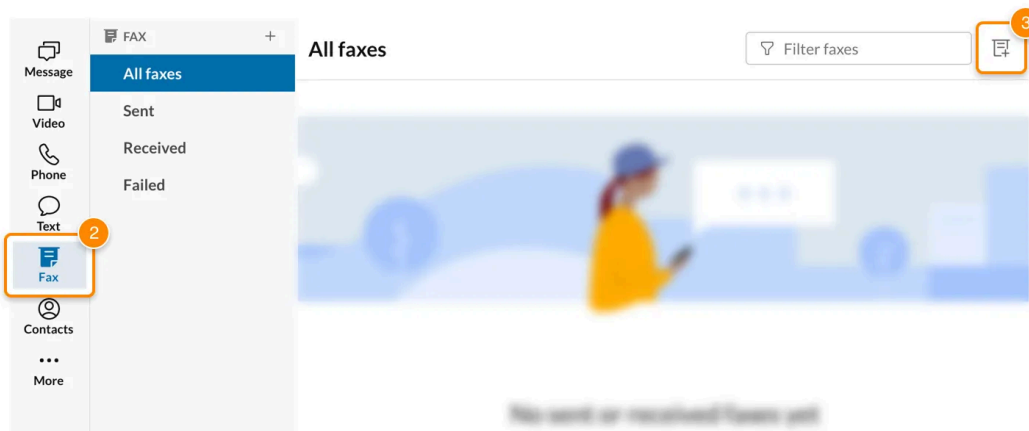
## Using the fax menu

You can send faxes in the RingCentral app for desktop and web:

- To one or multiple contacts at a time
- Immediately or at a scheduled date and time

### Sending a fax

1. Click the plus icon next to **Fax** or the **Fax icon** at far right.  
Note: Depending on how your tabs are customized, you may need to click **More > Fax**.
2. In the upper right corner, select the **Fax icon**.



3. Enter the phone numbers or names from your contacts list in the **To** field.  
Note: You can add up to 50 recipients. To add more, Fax broadcasting must be turned on. [Learn how](#)
4. Select a **Cover page style** or click **Add cover page** and select a template. If you don't want to use a cover page, select *None*. If you'd like, add a **Cover page note**.

**New fax**

**To**  
Enter fax number or contact number

**Cover page**  
Ancient

Cover page note

Attach file (maximum files size is 50 MB)

[Cancel](#) [Send later](#) [Send now](#)



You can send a fax with a custom cover page where you can assign a name, upload a file, or download a template you can configure before uploading. Previously uploaded custom cover fax pages are readily available to be selected, and you have an option to preview, edit or delete it.

- Drag and drop or attach a .docx file
- Click sample.docx to customize a new cover page and then upload

**New fax**

To  
Enter a fax number or a contact number

**Add a new cover page**

Cover page name  
Enter name

Drag and drop or attach a .docx file

You can use [sample.docx](#) to customize a new cover page and then upload it here.

Cancel Save

Cancel Send later Send now

5. Click the **Attach file** paperclip and select the files you want to send.  
Note: Make sure the files are smaller than 50 MB combined and that they are one of the [supported file types](#).
6. To send the fax immediately, click **Send now**. To send the fax at a future date and time, select **Send later**, enter a date and time, then click **Schedule**.

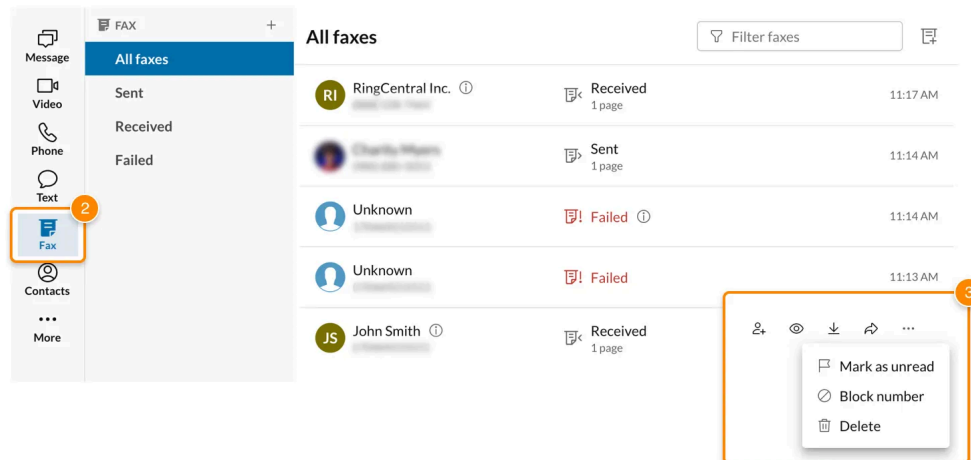
To confirm whether a fax was sent, go to **Sent** or **All faxes**. A fax's status shows as **Processing**, **Submitted**, **Sent**, **Failed**, or **Received**. To learn more, visit [Send and Receive a Fax in the RingCentral App](#).

## Viewing and managing a fax

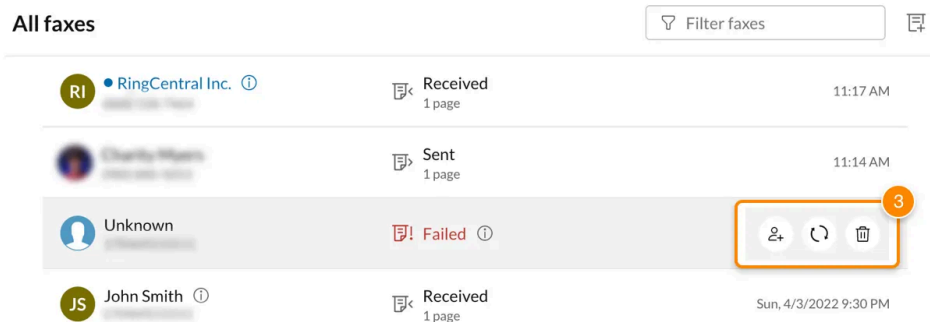
With RingCentral, you can send and receive faxes without a fax machine. You can view, download, forward, or delete a fax.

1. Select **Fax** from the left navigation bar.

Note: Depending on how your tabs are customized, you may need to click **More > Fax**.



2. Hover over a fax entry to show your options at the far right:
  - Click the person icon and select *Create new contact* or *Add to existing*.
  - Click the eye icon to view the fax.
  - Click the download icon to save the fax to your device.
  - Click the right arrow icon to forward your fax to another recipient.
  - Click the circular arrows to resend a failed fax.
  - Click **More** and select **Mark as read**, **Block number**, or **Delete**.



You can see the number of unread faxes both over the Fax icon and to the right of the **Received** tab. Unread faxes are shown as blue text. Faxes will show as **Sending**, **Sent**, **Received**, or **Failed**.