RINGCENTRAL APP: CREATING AND MANAGING TASKS

This quick guide shows you how to create and manage tasks within the RingCentral app. You can add tasks to individual, group, and team conversations, to help track your organization's tasks within one application.

CREATING A TASK

Follow these steps to create a task:

1. Click **New Task**.
2. Enter a Task title. This is the only required field.
3. You may create a new or use an existing category.
4. Type the assignee names. You may assign the task to yourself for tracking purposes or assign a task to one or more team members.
   a. You can also click **Add all** to add your name as one of the assignees.
5. Enter a due date and a due time.
6. Select the task recurrence.

New task (Ringo RCU)

Task title ②
Script Review - Creating and Managing Tasks

Team
Ringo RCU

Category
③ Product Script Review ✕

Assignees   4a Add all (2 members)   Clear
Ringo RCU ✕ ④
Some assignees are no longer in this conversation.

Due date   Due time
⑤ 9/13/2022   📅   12:00 PM   🕐

⑥ Repeat

Complete when

Color tag

📎 ☺

Enter task description

| None |
| Every day |
| Every weekday |
| Every week |
| Every month |
| Every year |

Cancel   Post and new   Post and close

7. Choose how you want the task completed:
   a. **Checked** – Any one of the assignees can mark the task as complete.
   b. **Checked by all assignees** – All assigned members check the task for it to complete.
   c. **100% done** – Task can be marked by incremental percentages until it is complete.
8. Assign a color tag. Use this option for easier identification when you have multiple tasks.
9. Click **Attach** to attach a file.
10. Complete the task description.
11. Click **Post and new** to post and create another task or **Post and close** to post and close the task window.
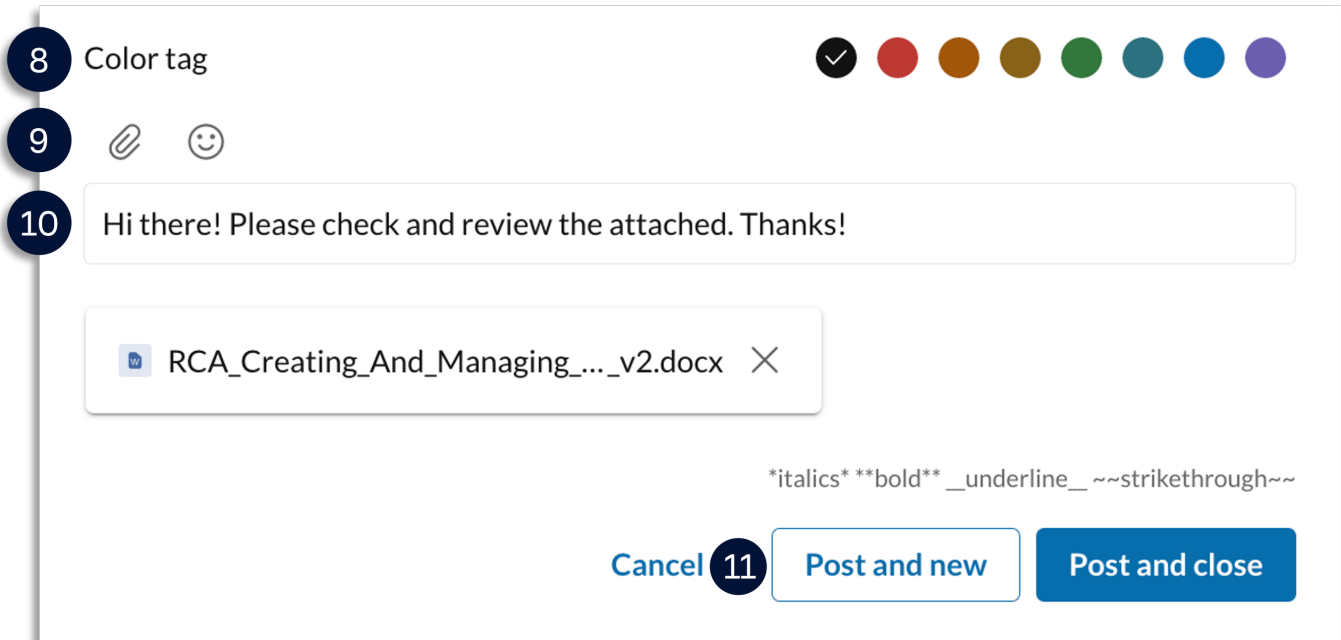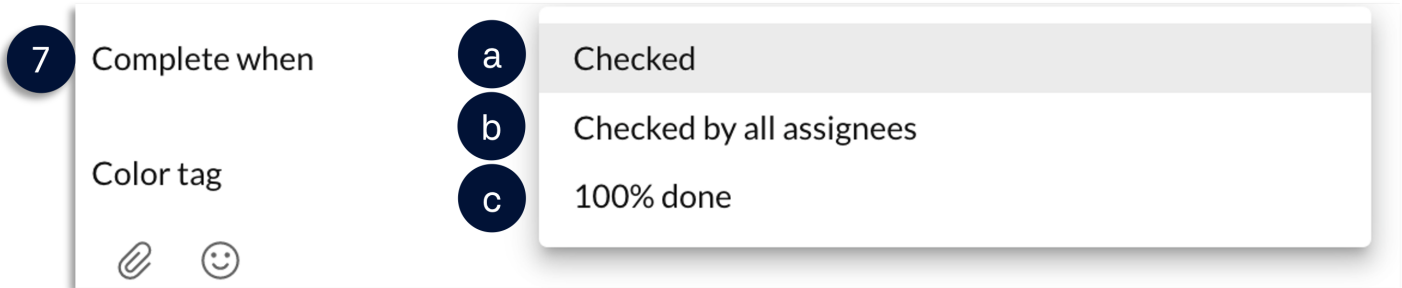
MANAGING A TASK

Follow these steps to manage a task:

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