# [Client Name] and RingCentral



## For additional information

1. **RingCentral University:** https://university.ringcentral.com/page/user-basics-mvp

2. **RingCentral Support/Knowledge Base**: https://support.ringcentral.com/

# Table of Contents

# RingCentral Desktop

1. From your computer, open the RingCentral app. The welcome screen will appear as follows:



2. Click **Sign in**



3. Enter your [Client name] email address and click **Next**

4. Enter the RingCentral password that was provided to you and click **Sign in**

tthibodeau@ ▪▪▪ ▪ ▬ ▬ ▪

Password

••••••••••••                                            ⊘

☑ Stay signed in

By signing in, you agree to the Terms of Service and Privacy Notice.
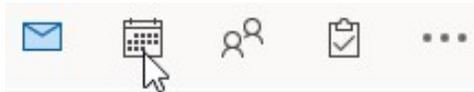
Back        Sign In

Forgot Password?

## Sign in to Outlook Plug-In

1. From your computer, open Outlook

2. In the bottom left corner, click the Calendar icon

3. On the toolbar in the top left corner, click **New Meeting**

New Appointment    New Meeting    New Items ⌄

New
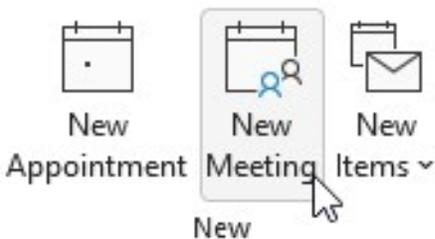
4. A new window will open. On the toolbar in the top right corner, there should be a **Schedule with RingCentral** icon

Dictate    Immersive Reader    Add a Zoom Meeting    Settings    Schedule with RingCentral    View Templates    Viva Insights

Voice    Immersive    Zoom    RingCentral Scheduler    My Templates    Add-in

5. If the icon is there, proceed to step 14. Otherwise, proceed to step 6 to install the RingCentral Outlook Plug-In

6. Close out of the new meeting window and return to the Outlook window

7. In the bottom left corner, click the Mail icon



8. On the toolbar in the top right corner, click **Get Add-ins**



9. Type "ringcentral" in the search box and click on **RingCentral Scheduler**
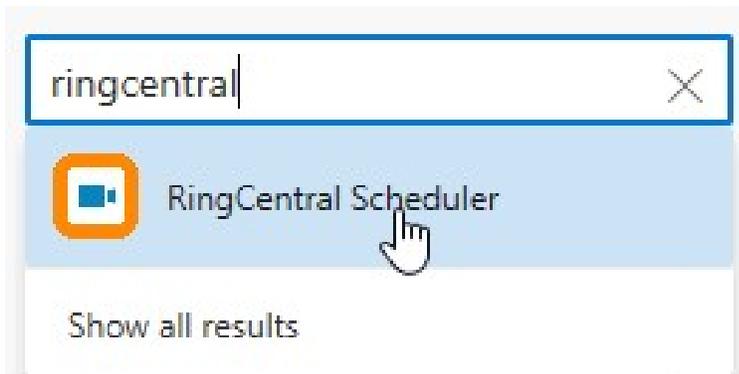


10. Click **Add**
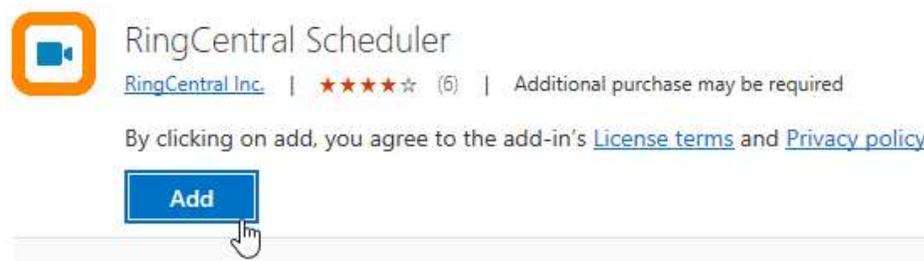


11. Verify the following message appears:

12. Close out of the Add-ins window

13. Repeat steps 2 - 3 above to open a New Meeting window

14. From the New Meeting window, click **Schedule with RingCentral**



15. The RingCentral Scheduler sidebar will open. Click **Sign in**



16. Enter your [Client name] email address and click **Next**

17. Enter the RingCentral password that was provided to you and click **Sign In**

Sign In

tthibodeau@ ▮▬▬▬▬▮

Password

••••••••••••

Back    Sign In

Forgot Password?

18. Once signed in, your RingCentral Scheduler sidebar will appear as follows:

RingCentral Scheduler

**Meeting settings**

☐ Use Personal Meeting ID 996-527-160

☐ Mute audio for participants

☐ Turn off camera for participants

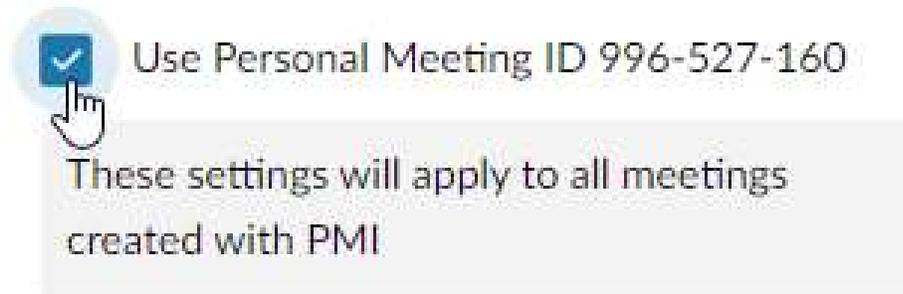**Security**

☐ Use end-to-end encryption ⓘ

☑ Require password

8jyd2BbGkP

☑ Participants can only join after me

☑ Enable waiting room for

Anyone outside my company ▼

☐ Only authenticated users can join

☐ Only host & moderators can share screen

19. Uncheck **Require password**



20. It is also recommended to check **Use Personal Meeting ID ###-###-###**[1]



21. When you are finished making changes, click **Update**



22. Close out of the New Meeting window. If prompted to save changes, click **No**

# RingCentral Voicemail

With RingCentral, there is no need to setup your voicemail, as it will already be setup with a standard greeting.

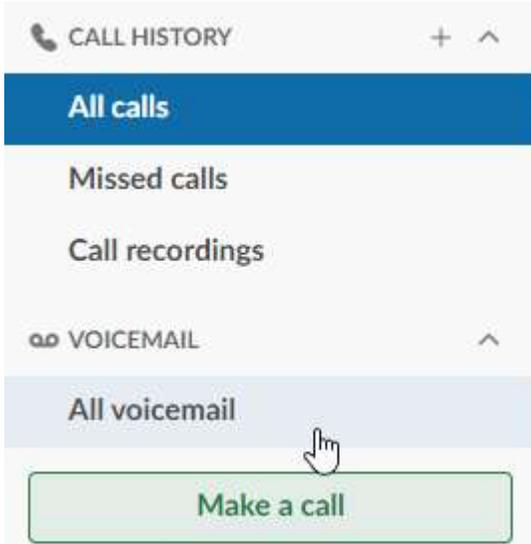## Checking Your Voicemail

### From Your Desktop App

1) Open the RingCentral App from your computer.

2) Verify that RingCentral is opened in the **Phone** section of the app.



3) Look for the **All voicemail** icon and click it



4) From the **All voicemail** page, you will see a list of voice messages that have been left for you (if empty, there are no voice messages)

**All voicemail**



5) Hover your cursor over a voice message (if done correctly, the voice message will highlight blue)



    a) This is the *play* button
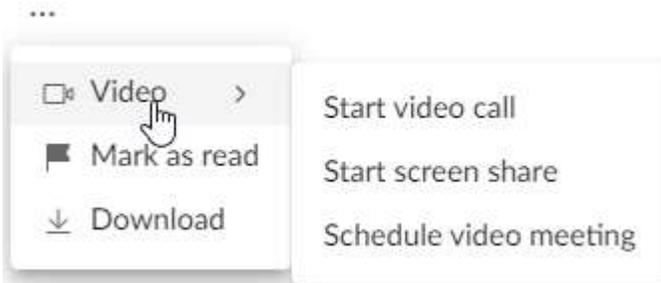
b) This is the *show transcript* button



c) These are the *call back*, *text message* and *delete* buttons



d) There is also a *more options* button



Clicking the *more options* button will show the following options:
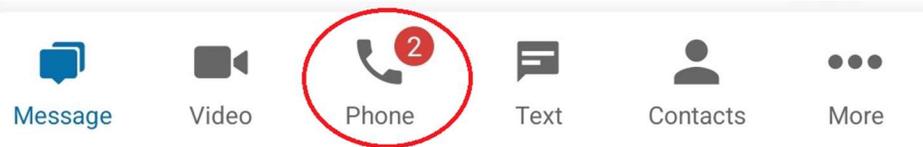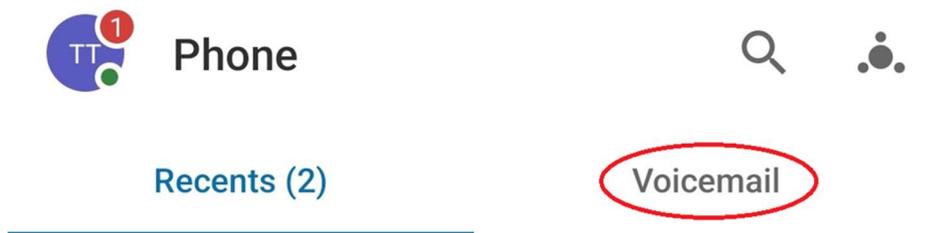


**From your mobile (phone) app**

1) Open the RingCentral mobile app (if not installed, open the app store, search "RingCentral" and download the app). The icon appears as follows:

2) Once the app is open, tap **Phone** from the row of icons at the bottom of the screen



3) Tap the **Voicemail** icon



4) From the list of voice messages, tap the one you want to listen to
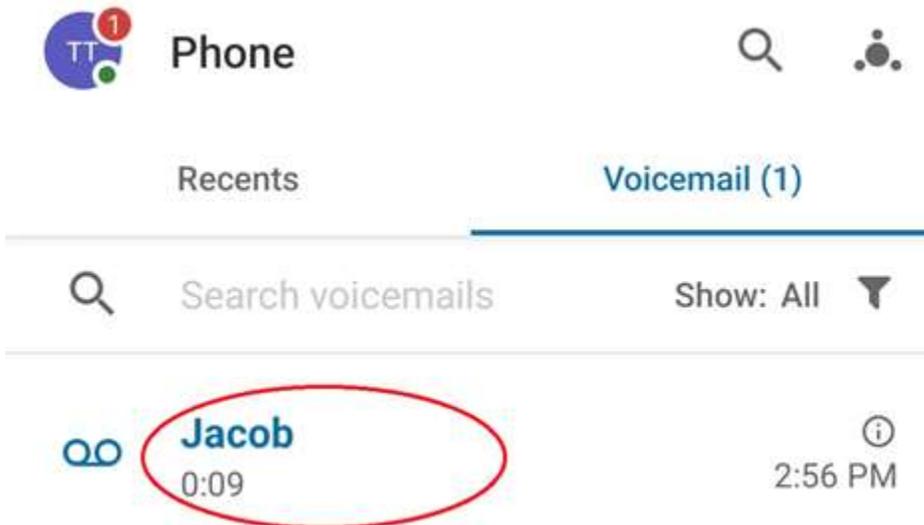


5) The voicemail screen will appear as follows, and will have several components:
   a) The voice to text transcription
   b) The *play* button
   c) The *volume* button
   d) The *text message* button
   e) The *call back* button
   f) The *delete message* button

From: **Jacob**
Received: 2:56 PM

To: 503

**a**

Test test test test test test test test test test?

**b** **c**

▶ ●━━━━━━━━━━━━━━━━━━━━━ 🔊

00:00 00:09

**d** **e** **f**

**RingCentral Meetings**

Refer to the earlier section of this document titled [RingCentral Desktop](#) for instructions signing into RingCentral Desktop Program and Outlook Plug-In.

## Using RingCentral Desktop

### Viewing your meeting schedule

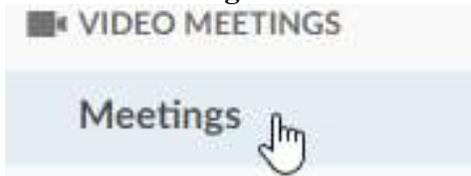1. Open RingCentral Desktop Program. The start menu icon appears as follows:
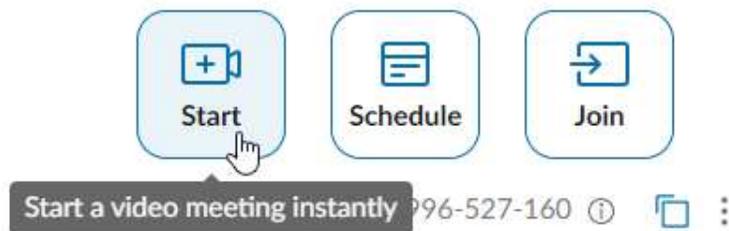


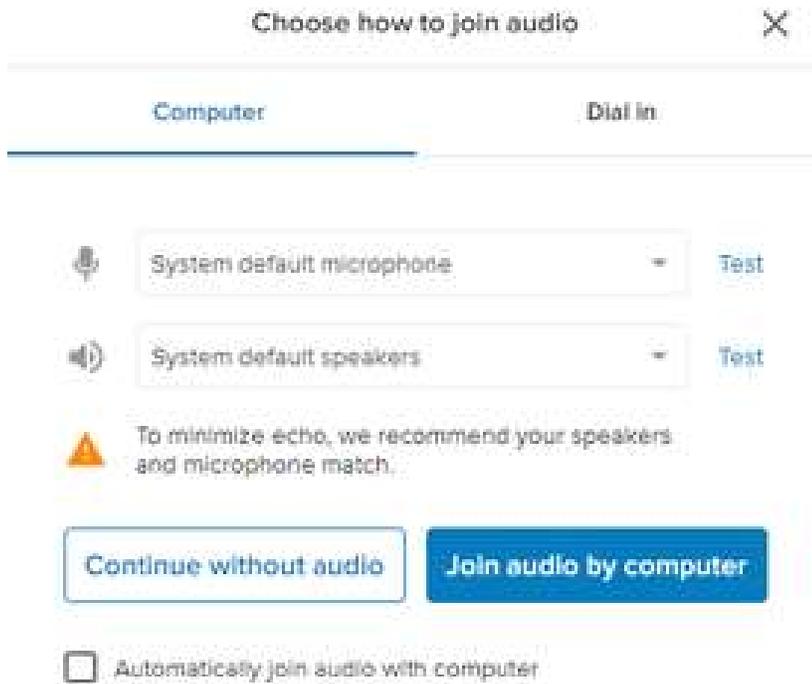2. Click the **Video** icon



3. Click the **Meetings** tab



### Starting an Instant (Unscheduled) Meeting
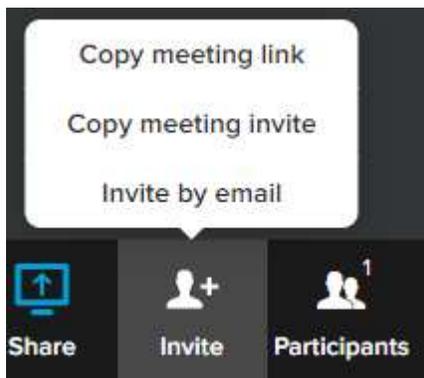
From the RingCentral Meetings tab,

1) Click **Start**



2) In the new meeting window that appears, verify your audio settings and choose whether to **Continue without audio** or **Join audio by computer**

3) Once the meeting starts, click the **Invite** icon from the icon tray at the bottom of the meeting window:



4) From the **Invite** menu that pops up, there are several ways to add attendees
   a) **Copy meeting link,** which copies just the meeting URL itself (e.g):
      https://v.ringcentral.com/join/352263056

   b) **Copy meeting invite**, which copies invite text and the meeting URL:
      "[Your Name] has invited you to a RingCentral Video meeting.

      Please join using this link:
      https://v.ringcentral.com/join/352263056

      Meeting ID: 352 263 056

      One tap to join audio only from a smartphone:
      +16504191505,,352263056# United States (San Mateo, CA)

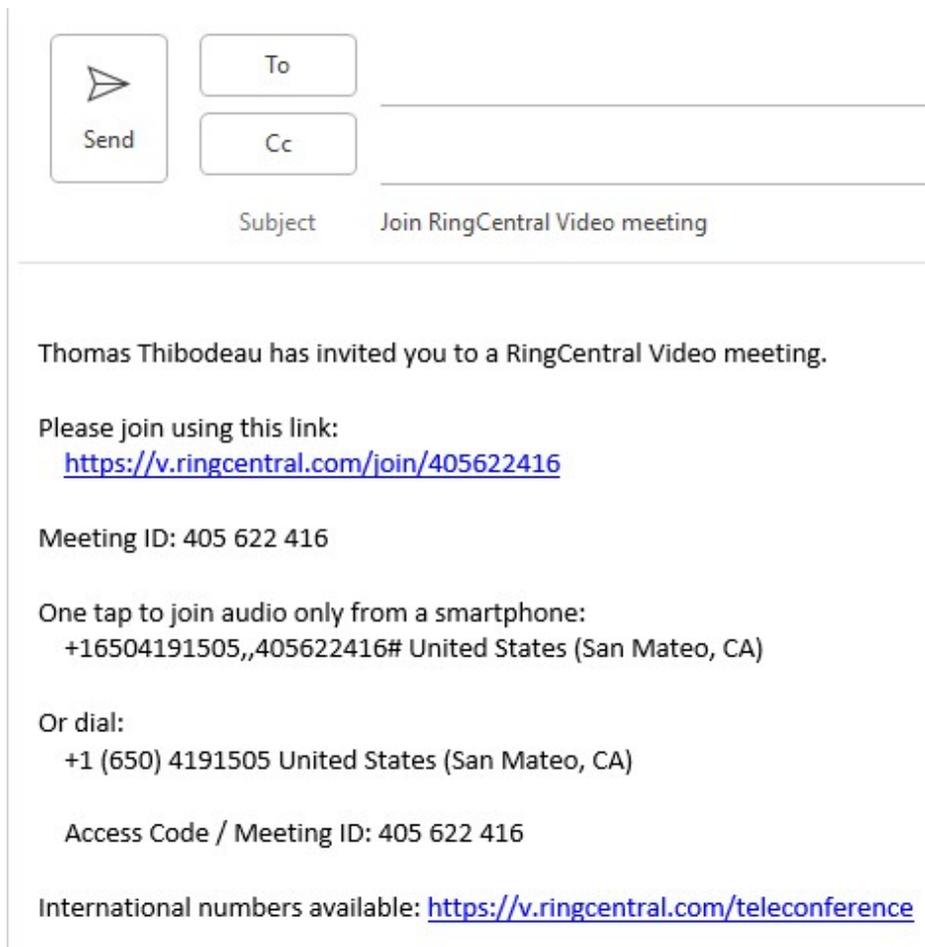      Or dial:
      +1 (650) 4191505 United States (San Mateo, CA)"

```
Access Code / Meeting ID: 352 263 056
```

International numbers available: https://v.ringcentral.com/teleconference)

c) **Invite by email**, which opens a new email window in Outlook and auto-fills with the meeting invite



**Starting a Planned (Scheduled) Meeting**

From the RingCentral Meetings tab,

1. Click **Schedule**

2. In the *Schedule a meeting* window that appears, customize your meeting and click **Schedule**

## Schedule a meeting

Meeting title

Your | RingCentral Video meeting

| Date | Time | Duration |
|------|------|----------|
| 12/20/2021 | 02:00 PM | 1 hr 00 min |

Schedule using ⓘ                                    Outlook app calendar ▾

Create team and invite members ⓘ                    ☐

Use personal meeting: 996-527-160 ⓘ                 ☑

Personal meeting settings              **Change personal meeting settings**

   Require password            Alphanumeric only          ☐

   Participants can only join after me                          ☑

   Enable waiting room                                         ☑

     Enable waiting room for         Everyone ▾
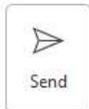
Advanced settings ▾

Cancel        **Schedule**

3. A new email window opens in Outlook with the options you customized from the previous step



ⓘ You haven't sent this meeting invitation yet.
   This appointment conflicts with another one on your calendar.

Title: Your RingCentral Video meeting

Start time: Mon 12/20/2021  2:00 PM    ☐ All day    ☐ 🌐 Time zones
End time: Mon 12/20/2021  3:00 PM    ↻ Make Recurring
Location: https://v.ringcentral.com/join/996527160

Thomas Thibodeau has invited you to a RingCentral Video meeting.

Please join using this link:
https://v.ringcentral.com/join/996527160

Meeting ID: 996527160

One tap to join audio only from a smartphone:
+16504191505,,996527160# United States (San Mateo, CA)

Or dial:
+1 (650) 4191505 United States (San Mateo, CA)

Access Code / Meeting ID: 996527160

International numbers available: https://v.ringcentral.com/teleconference

4. Add attendees to the meeting, verify all details are correct and click **Send**

ⓘ You haven't sent this meeting invitation yet.
   This appointment conflicts with another one on your calendar.

| Send | | | |
|------|---|---|---|
| | Title | Your RingCentral Video meeting | |
| | Required | ● Thomas | |
| | Optional | | |

| | Start time | Mon 12/20/2021 📅 | 2:00 PM ▾ | ☐ All day ☐ 🌐 Time zones |
|---|---|---|---|---|
| | End time | Mon 12/20/2021 📅 | 3:00 PM ▾ | ↻ Make Recurring |

| | Location | https://v.ringcentral.com/join/996527160 |
|---|---|---|

Thomas Thibodeau has invited you to a RingCentral Video meeting.

Please join using this link:
https://v.ringcentral.com/join/996527160

Meeting ID: 996527160

One tap to join audio only from a smartphone:
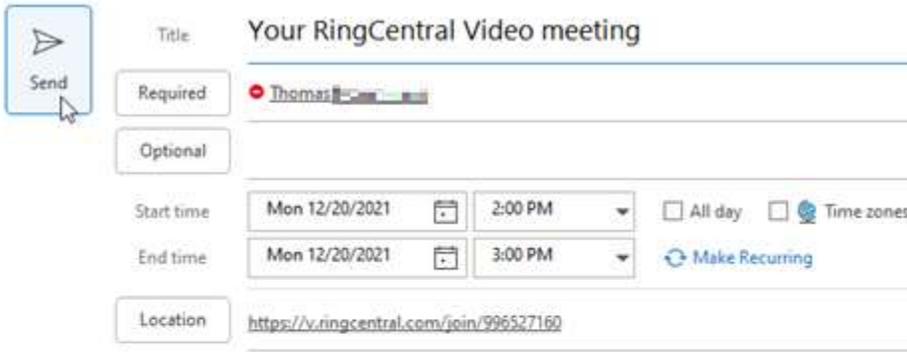+16504191505,,996527160# United States (San Mateo, CA)

Or dial:
+1 (650) 4191505 United States (San Mateo, CA)

Access Code / Meeting ID: 996527160

International numbers available: https://v.ringcentral.com/teleconference

b
▶ ●━━━━━━━━━━━━━━━━━━━  c
                        🔊 ))
00:00                   00:09

d          e          f
💬          📞          🗑

5. To verify the meeting was successfully created, return to the RingCentral Desktop Program and verify that the **Meetings** option from the **Video** tab is still opened:
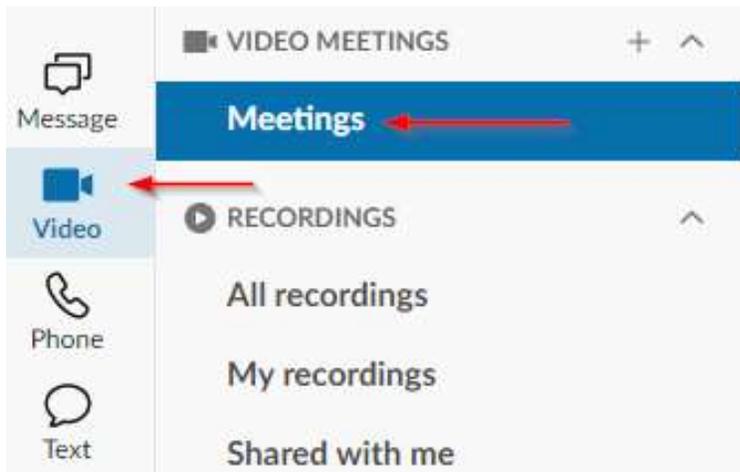
6. From the main window (under **Start**, **Schedule**, and **Join** buttons), look for calendar events. The RingCentral Video meeting you just created should appear:



## Starting A Meeting With Personal Meeting ID (PMI)[1]

**NOTE:** The Personal Meeting ID <u>replaces</u> traditional meeting invites, which will be explained in the following steps.
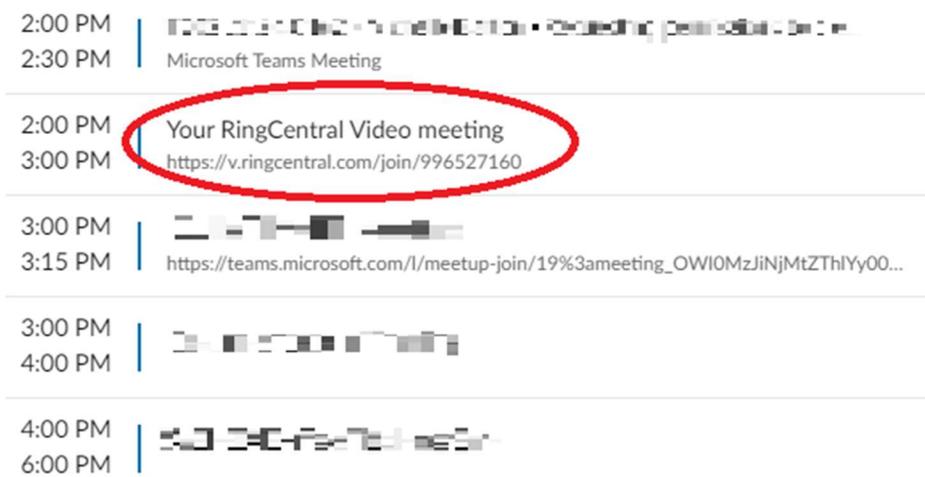
1) If you have already setup a PMI, proceed to step 3. Otherwise, click the **More** (three dots) icon next to "Your personal meeting ID", then click **Customize your personal meeting**:
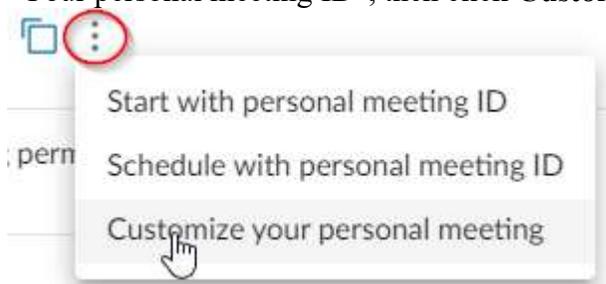


2) The Personal meeting settings window will appear. From it, there are several options you can customize for your PMI:

a) **Personal meeting ID** - this is the 9 digit number that will be assigned to your meetings. The ID is a unique identifier to your meetings only.

b) **Personal meeting name** - this is the 5-40 character name that will be assigned to your meetings. The name is a unique identifier to your meetings only. The name needs to:
   i)   Contain at least one letter
   ii)  Be 5-40 characters long
   iii) Only contain: a-z, 0-9, underscore, dash and period (no spaces)
   iv)  Must end in a letter or number

c) **Use Personal meeting ID or name for instant meetings** - By default, your PMI is used for scheduled meetings, but not for instant meetings. Select this option if you wish to use your PMI for both scheduled and instant meetings.

d) When you are done configuring your personal meeting settings, click the **Save** button



3) Once your PMI is configured, all you will need is your personal meeting link. To find the link, return to the meetings page in RingCentral.

4) Click the **Copy meeting link** icon next to "Your personal meeting ID"
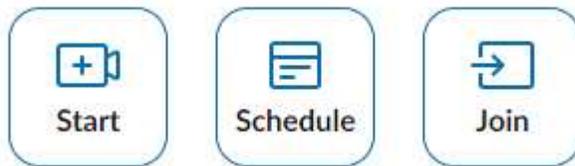


Your personal meeting ID: 996-527-160 | name: tthibodeau ⓘ   [copy icon]   ⋮

Copy meeting link

5) Once you have copied your personal meeting link, simply send it to your attendees and start/schedule a meeting

## Using RingCentral Outlook Plug-In

1. Open your Outlook Desktop Program.

2. Click the **Calendar** icon from the bottom left corner



3. Click **New Meeting**



New Appointment   New Meeting   New Items ˅

New
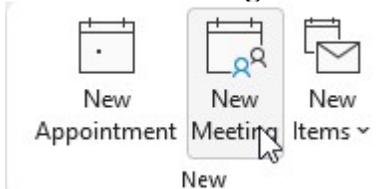
4. From the icon bar at the top of the window, click **Schedule with RingCentral**



Immersive Reader      Schedule with RingCentral

Immersive   RingCentral Scheduler

5. Sign In, if prompted. Otherwise, continue to the next step.

6. Fill in the settings you wish to use
   **NOTE**: If you wish to use your Personal Meeting ID, refer to step 15 in the previous section for more information

## RingCentral Scheduler                                  ✕

### Meeting settings

☑ Use Personal Meeting ID 996-527-160

> These settings will apply to all meetings
> created with PMI

☐ Mute audio for participants

☐ Turn off camera for participants

### Security

☐ Use end-to-end encryption ⓘ

☐ Require password

☑ Participants can only join after me

☑ Enable waiting room for

| Everyone                          ▼ |
|-------------------------------------|

☐ Only authenticated users can join

☐ Only host & moderators can share
screen

7. When ready, click the **Update** button

**Update**

8. Note that clicking **Update** automatically fills the body of your new meeting with a meeting invite:

ⓘ You haven't sent this meeting invitation yet.

| | | |
|---|---|---|
| ⟶ Send | Title | RingCentral Video Meeting |
| | Required | |
| | Optional | |

| | | |
|---|---|---|
| Start time | Mon 12/20/2021 📅 | 12:00 PM ▼  ☐ All day  ☐ 🌐 Time zones |
| End time | Mon 12/20/2021 📅 | 12:30 PM ▼  ↻ Make Recurring |
| Location | https://v.ringcentral.com/join/996527160 | |

Thomas Thibodeau has invited you to a RingCentral Video meeting.

Please join using this link:
https://v.ringcentral.com/join/996527160

One tap to join audio only from a smartphone:
+16504191505,,996527160# United States (San Mateo, CA)

Or dial:
+16504191505 United States (San Mateo, CA)
Access Code / Meeting ID: 996 527 160

International numbers available: https://v.ringcentral.com/teleconference

9. Add attendee(s), fill in the remaining details of your meeting, and click **Send**

ⓘ You haven't sent this meeting invitation yet.

| | | |
|---|---|---|
| ▷ Send | Title | RingCentral Video Meeting |
| | Required | ✅ Thomas ▮▮▮▮▮▮▮▮ |
| | Optional | |

| | | | | |
|---|---|---|---|---|
| Start time | Mon 12/20/2021 📅 | 12:00 PM ▾ | ☐ All day | ☐ 🌐 Time zones |
| End time | Mon 12/20/2021 📅 | 12:30 PM ▾ | ↻ Make Recurring | |
| Location | https://v.ringcentral.com/join/996527160 | | | |

Thomas Thibodeau has invited you to a RingCentral Video meeting.

Please join using this link:
https://v.ringcentral.com/join/996527160

One tap to join audio only from a smartphone:
+16504191505,,996527160# United States (San Mateo, CA)

Or dial:
+16504191505 United States (San Mateo, CA)
Access Code / Meeting ID: 996 527 160

International numbers available: https://v.ringcentral.com/teleconference

**b** **c**
▶ ● ──────────────────────── 🔊
00:00                              00:09

**d**                **e**                **f**
💬                   📞                   🗑️

10. Open RingCentral Desktop Program. The program icon looks as follows:
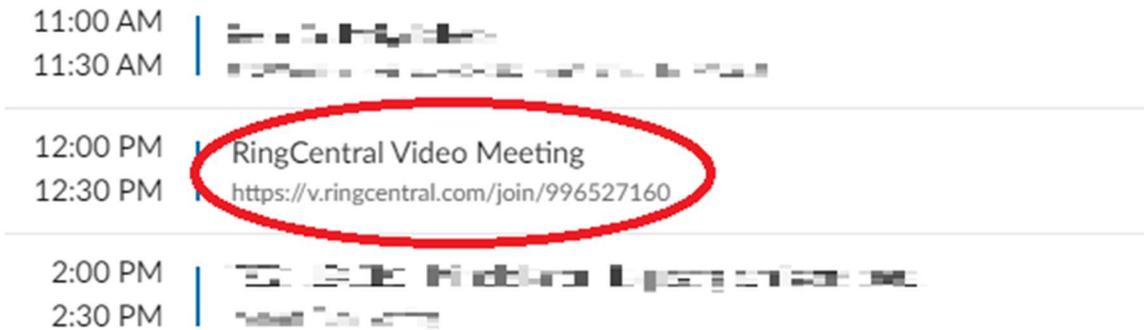
Ⓡ RingCentral

11. Click the **Video** icon



12. Click **Meetings**

13. From the main window, under **Start**, **Schedule**, and **Join** buttons, there should be a calendar events, including the RingCentral Video meeting you just created:
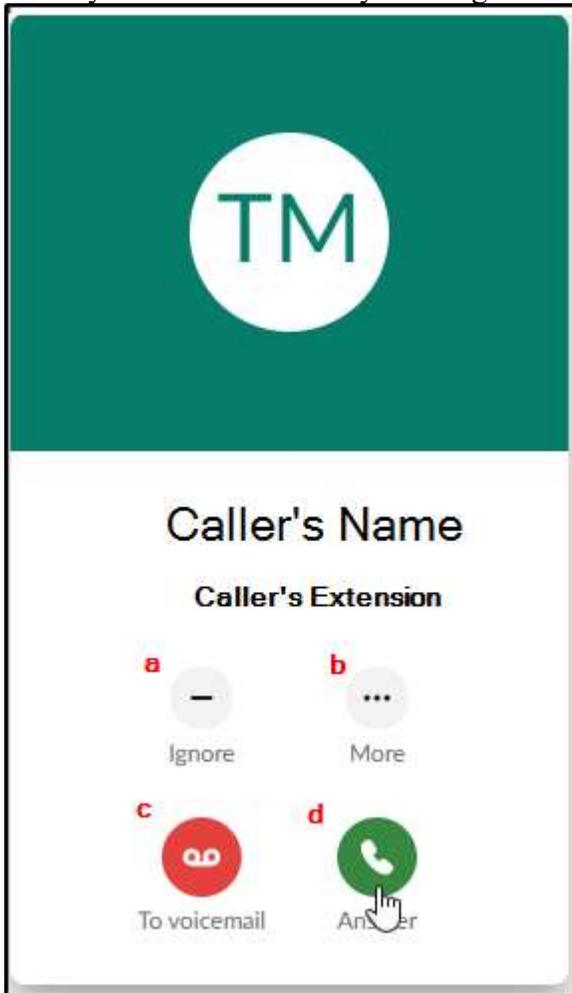


# Making and Receiving Calls

**From RingCentral Desktop Program**

**Receiving A Call**

1) When you *receive* a call on your RingCentral Desktop Program it will appear as follows:



a) Clicking **Ignore** will cause the new call window to close. If the call is coming from a queue you are signed into, the call will continue to ring in the queue until answered, but will not show as ringing from your RingCentral Desktop Program.

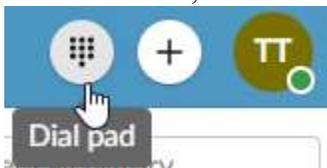b) Clicking **More** will show the following menu:
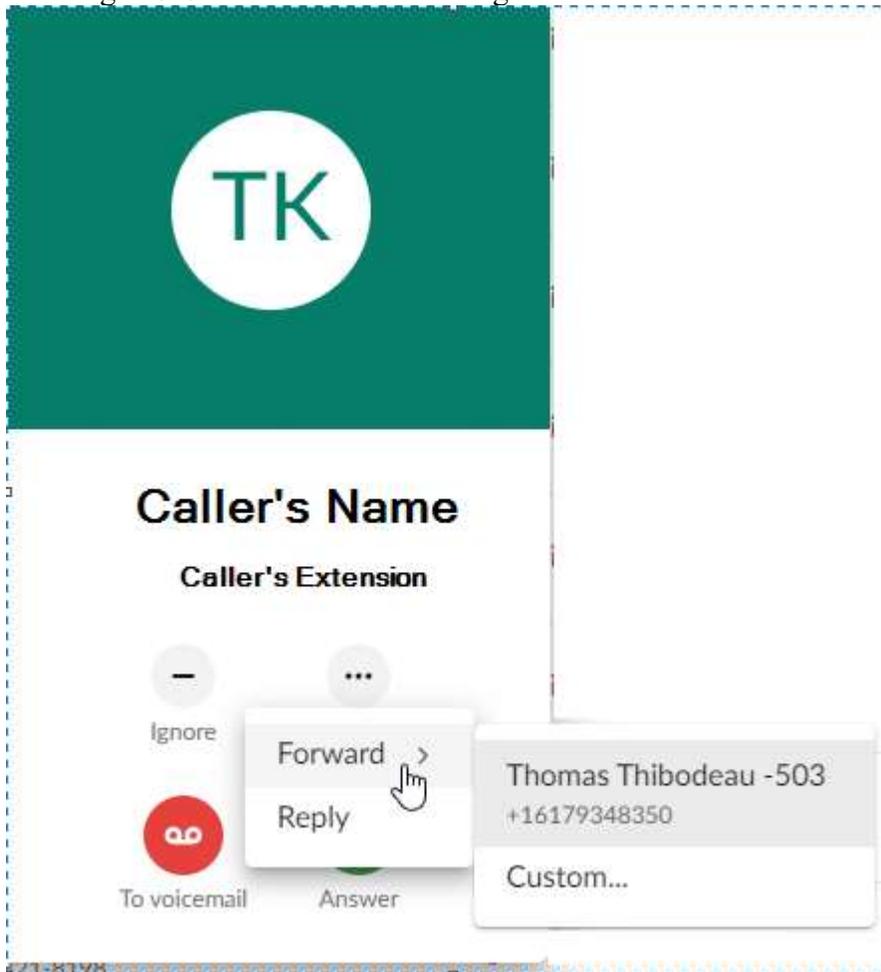


c) Clicking **To voicemail** will send the call immediately to voicemail

d) Clicking **Anser** will answer the call immediately
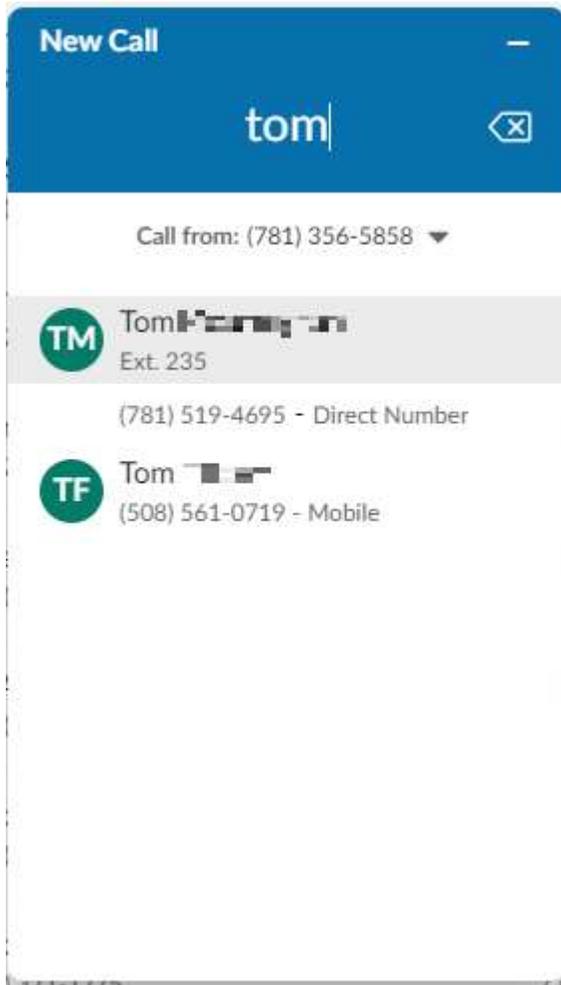
## Making A Call

1) To *make* a call, click the **Dialpad** icon in the top right-corner of the RingCentral window:



2) From the **New Call** window that opens, you have two options:
   a) Search for the recipient by name
      i) Start typing the name of the recipient you wish to call and a list of matching RingCentral contacts will appear:
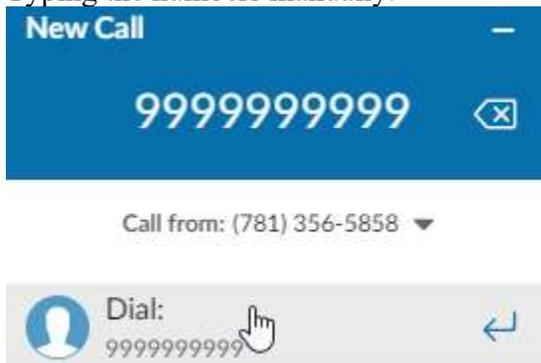
ii) Simply click the name of the recipient you wish to call, and the call will start.

b) Dial the recipient's phone number, by doing one of the following:
i) Clicking numbers on the on-screen keypad

ii) Typing the numbers manually.



## Ending A Call

1) To end a call:

a) From a call that is in progress, click the **End call** button



## From RingCentral Mobile App[2]

### Receiving A Call

RingCentral Mobile screenshots in this section may differ from what is shown on your smartphone, depending on which type of smartphone you are using.

1) When there is an incoming call on your RingCentral mobile app, a notification will appear and will appear as follows:
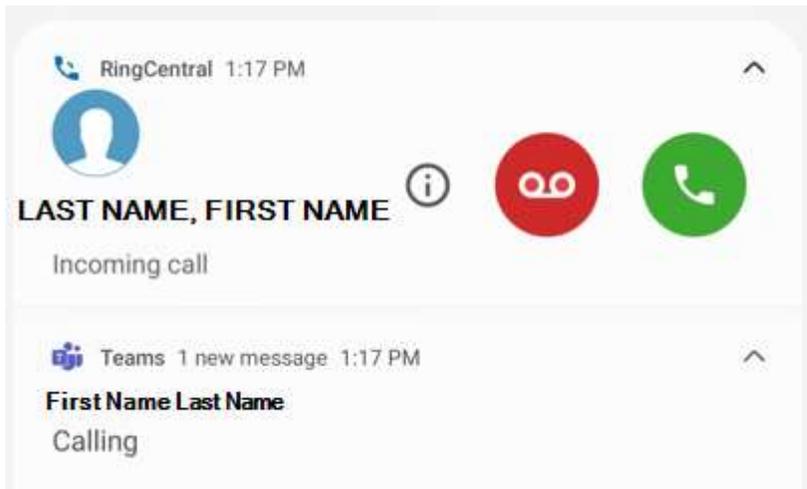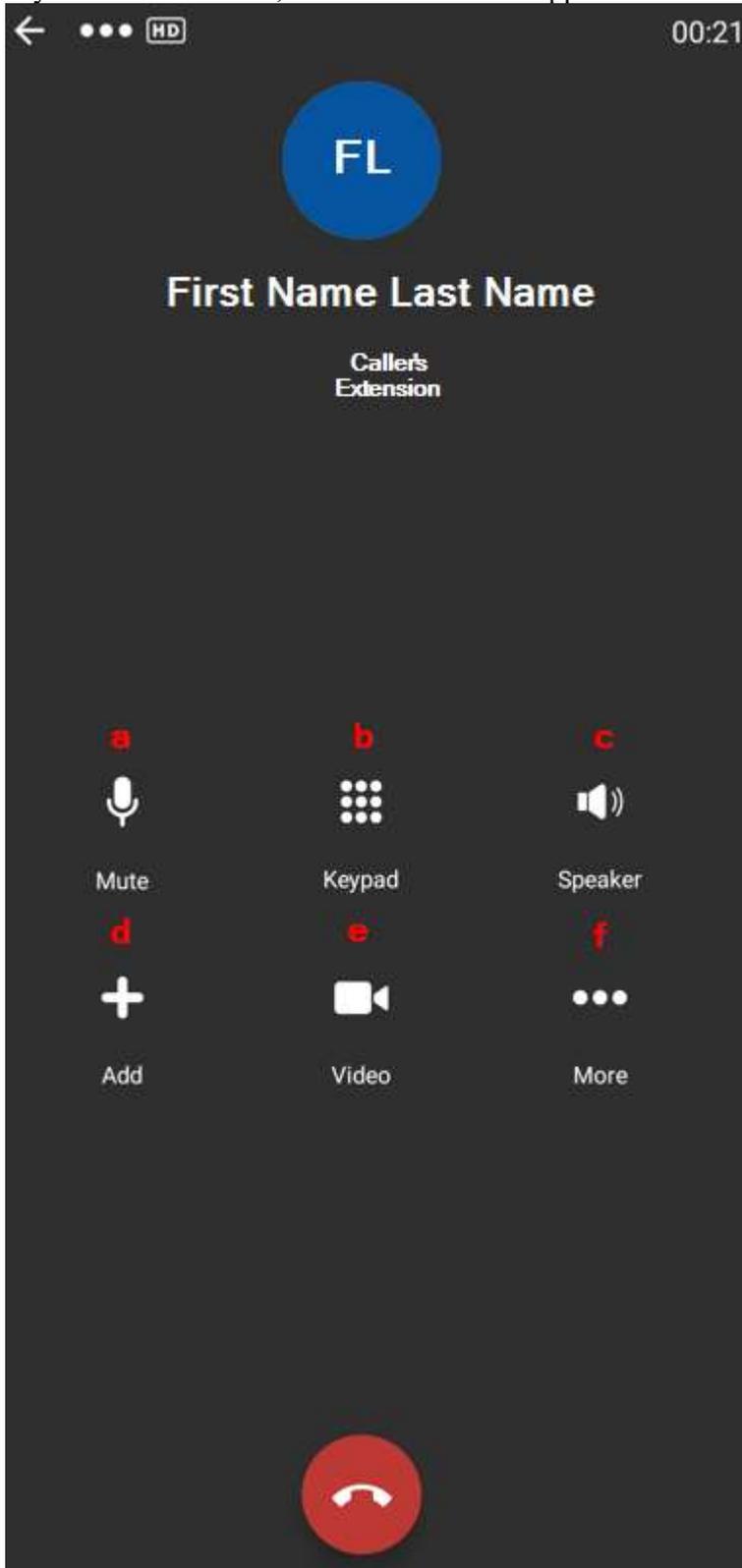
2) RingCentral Mobile App will show the following options to answer an incoming call:
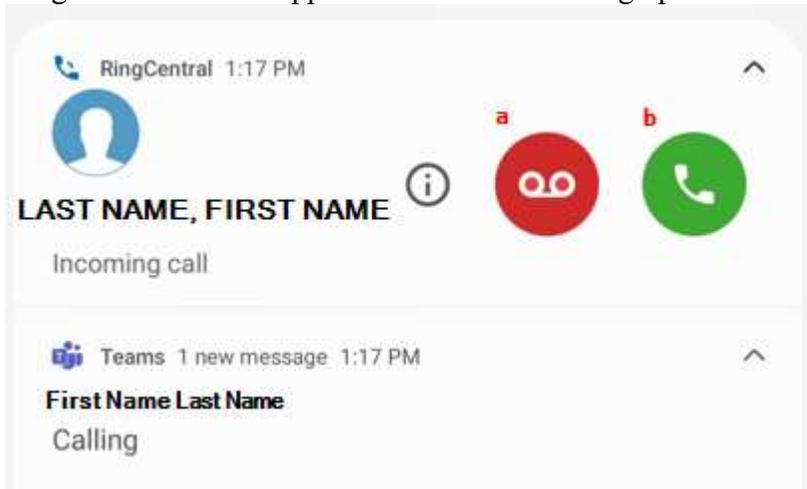


a) Tapping **Send to Voicemail** will close the incoming call notification and send the call to your voicemail box instantly.

b) Tapping **Answer Call** will answer the call immediately

3) If you answer the call, the call screen will appear with the following options:



a) Tapping **Mute** will mute your audio immediately

b) Tapping **Keypad** will bring up the onscreen keyboard

c) Tapping **Speaker** will switch the caller's audio to speakerphone

d) Tapping **Add** will bring up the add a call screen, where you can add someone to the call for three-way calling

e) Tapping **Video** will bring up the video call menu

f) Tapping **More** will bring up the more options menu with the following options:

More

❚❚   Hold

👥   Transfer

📡   Switch to carrier

◯   Record
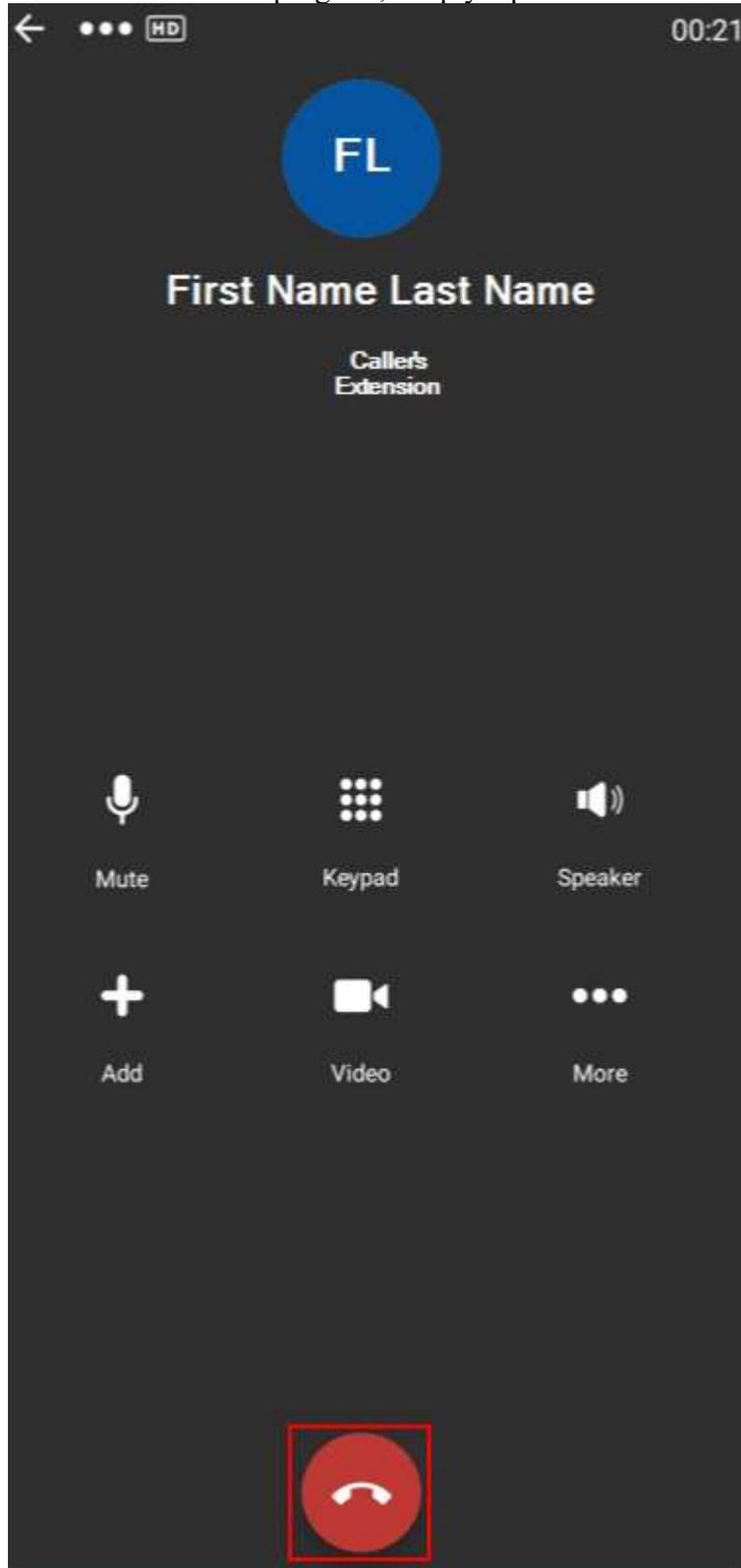
🅿   Park

☎   Flip

**Ending A Call**

1) To end a call:

a) From a call that is in progress, simply tap the **End call** button:



# RingCentral Contacts

## From RingCentral Desktop

### Opening Your Contact List

1. From your computer, open the RingCentral Desktop Program.

2. Click **Contacts** on the left-hand menu:



## Managing Contacts

1) From the top-right corner of the **All contacts** window, you will see the following options:



a) The **Filter all contacts** search bar allows you to search for contacts by name

b) The **Create new contact** button allows you to add a new contact by filling in their contact information (to RingCentral contacts <u>only</u>, not Outlook or any other application)

## Create new contact
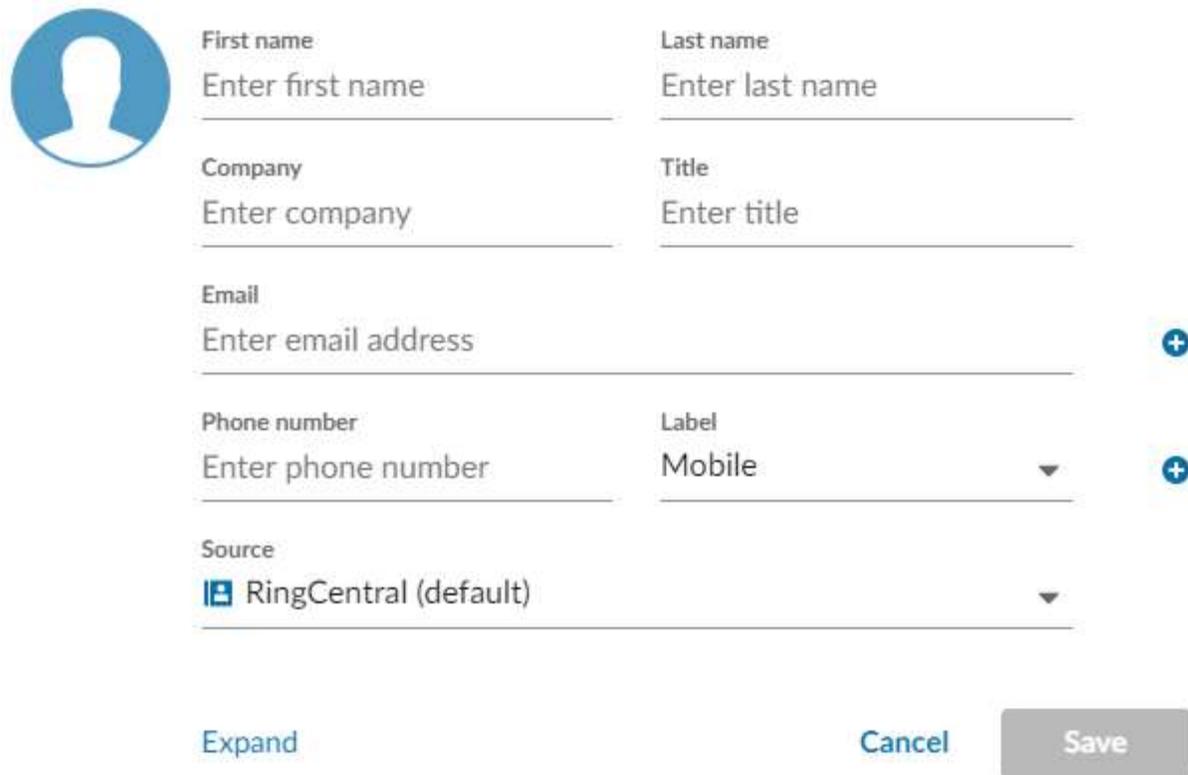


| First name | Last name |
| Enter first name | Enter last name |

| Company | Title |
| Enter company | Enter title |

Email
Enter email address    ⊕

| Phone number | Label |
| Enter phone number | Mobile ▾   ⊕ |

Source
🗐 RingCentral (default) ▾

Expand      Cancel   Save

c) The **Invite guests** button allows you to invite someone from outside your organization to your RingCentral organization as a guest. Guests who accept your invitation are able to collaborate with you on RingCentral.
**NOTE:** For more information, refer to the links included at the beginning of this document.

## Existing Contacts

1) When you hover your cursor over an existing contact in your contact list, the following options will appear:
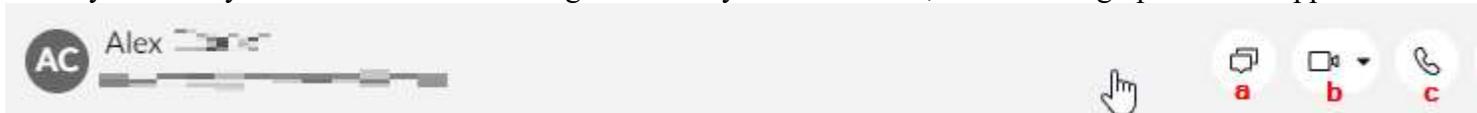


a) The **Message** button allows you to send the contact a direct message.

b) The **Start a Video Call** button allows you to start an immediate (unscheduled) video call with the contact. The **Video actions** drop-down menu within the **Start a Video Call** icon shows the following options:



Start screen share

Schedule video meeting
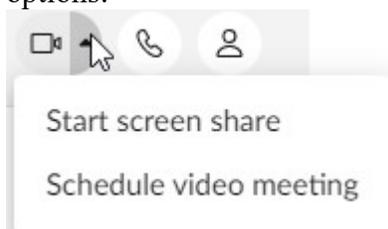
c) The **Phone** button allows you to call the contact.

d) The **Open Profile** button allows you to view more information about the contact.

[1] https://support.ringcentral.com/app/video/desktop-web/using-personal-id-ringcentral-app-desktop-web.html
[2] https://support.ringcentral.com/app/overview/mobile/downloading-installing-ringcentral-app.html