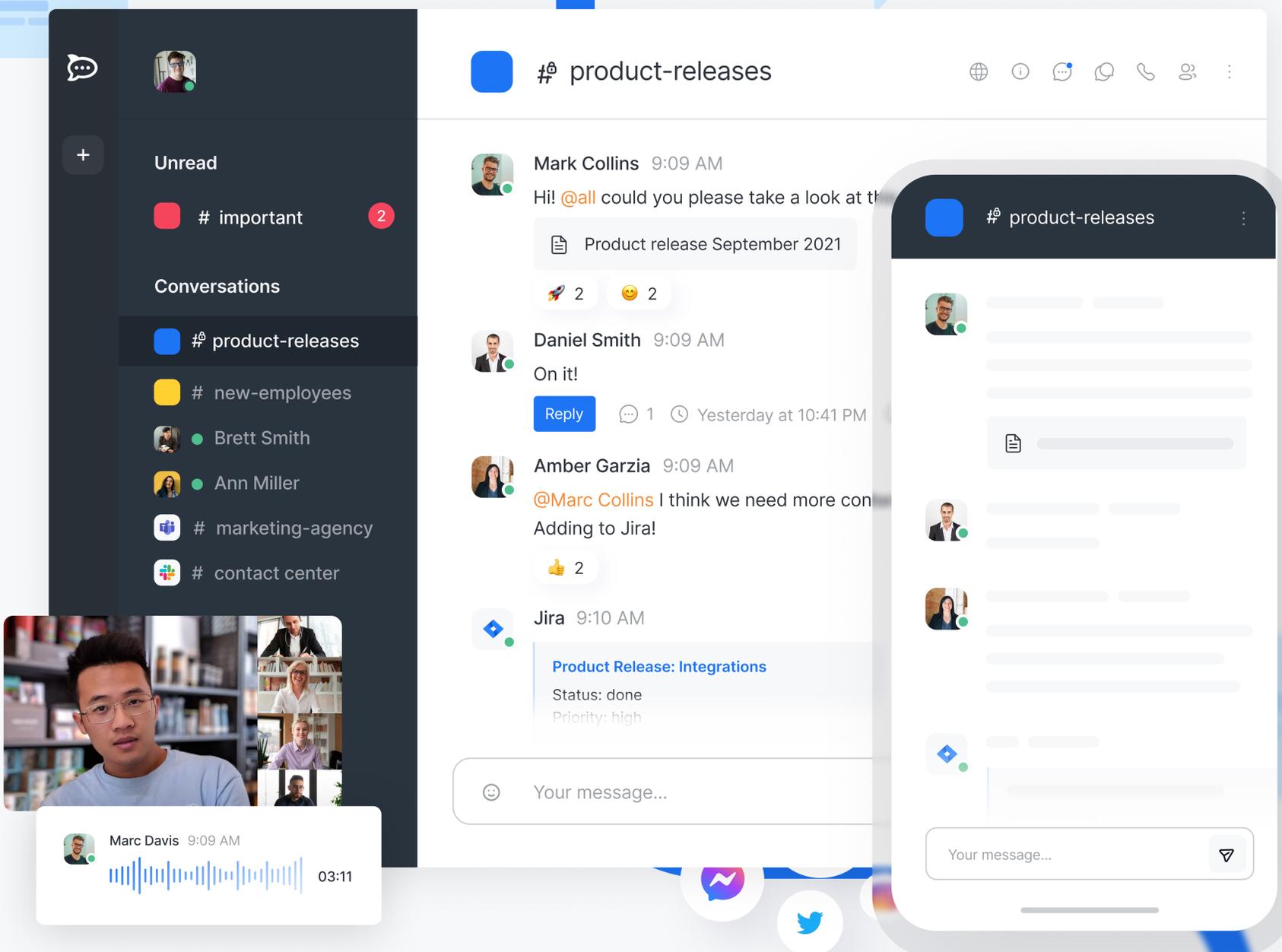


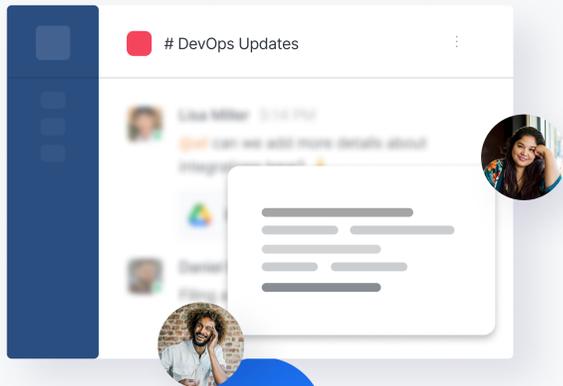


# Trial Guide

Complete these 10 steps to ensure a successful trial.



# Introduction



First things first. Thank you for giving us a try. During the next 30 days, you're welcome to explore the full potential of Rocket.Chat's functionalities.

That said, we thought it might be helpful if we put together this guide highlighting the 10 steps people who manage a successful trial usually take, in order of completion.

If you need help, feel free to [contact us](#) at any point.

# Step 1: Invite your first 3 users

It takes 2 to tango. Well, in this case, 4. Hear us out, there's no **real-time conversation** if you're the only one in there. First thing you'll want to do is [invite 3 colleagues](#) to join in with you.

Assign roles

Change permissions

 **Lisa Miller**  
VP Product

Administrator

 **Ralph Edwards**  
UI/UX Designer

Moderator

 **Eleanor Pena**  
Product Manager

Owner

 **Frankie Jones**  
Client

Guest

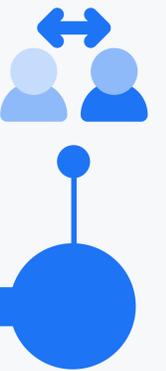


 Add User

## Step 2: Explore 5 different ways to collaborate

Some conversations are done and over in 5 minutes. Some might go on for days, months, years even. Some are public while others private. Frequently a bigger topic will spin out of one into a different group altogether. Whatever it is, you can do it all with Rocket.Chat.

This short guide summarizes [5 essential ways to collaborate](#):



Here's the TLDR version of it:

### 2.1 # Channels

These are meant for topics that are “evergreen.” Meaning they will coexist forever along with your company

#### 2.1.1 ✓ Public Channels

What makes it “public” is that anyone who’s a part of your workspace can choose to join (without any pre-approval).

For example, you could create one for IT announcements.

#### 2.1.2 🔒 Private Channels

Like public channels, you also want private ones to be evergreen. But every organization has a need to limit the audience of certain conversations: in these channels, you restrict participation only to the specific users added individually to it.

## 2.2 Teams

This is the best way of collaboration between a specific department or squad. By adding someone to a team, besides serving as a private channel it also contributes to onboarding new members. This feature enables the ability to find and join all channels that are relevant to them.

### 2.1.2

For example, you create a team for your IT department where it could reference the IT announcements public channel and allow members to join it themselves.

## 2.3 Direct Messages

Just as the name suggests. You can use this to message an individual or a group of select individuals directly. What's unique here is that you cannot add new people to this conversation once it's started.

## 2.4 Discussions

Used for specific and temporary topics. Say the IT team is working on a specific project. It may include a few IT team members (or all) and possibly even people from other teams. The point is, this is temporary, so it doesn't really make sense to create a full on channel. That's when you should create a discussion.

**Pro tip:** A discussion is always associated with a channel. You'll notice how anyone from that channel can see that a discussion was started and choose whether or not to join.

## 2.5 Threads

This is an essential feature to organize topic-specific conversations within a channel, discussion, or message. One of the downfalls of chat systems is that if you have a channel with a lot of people in it, or if a conversation suddenly takes off, it becomes very difficult to keep up with everything that's going on. That's where 'threads' come in. It's almost like organizing your chats into folders - instead of having every single message come in one under the other, you can click and reply to individual messages so that it opens up a different view just for that conversation.

**Bonus:** Within your unread messages, you'll sometimes notice different colored circles. This is incredibly helpful in helping you manage your conversations.

- **Red** means you've been tagged in that conversation, so you might want to prioritize it.
- **Blue** is for threads you've engaged or have notifications turned on.
- **Orange** is applicable for @all or @here tags.
- **Gray** is for direct messages without tagging nor threads.



# Step 3: See what's possible within your admin settings

## 3.1

# Set up video conferencing

Rocket.Chat comes with many settings that enable you to set up your workspace just the way you need it. That being said, here are some essential ones that will ensure a smooth experience for all your users:

Leverage our integration with Jitsi, BigBlueButton, Pexip, and Google Meet, to refrain from juggling tools, and initiate a video call from within Rocket.Chat.

Click on the phone icon within a Direct Message, Team, Channel, Discussion, and Multiple Direct Messages to get started.

The integration of Rocket.Chat and Pexip enables you to have secure and compliant communication. This comprehensive collaboration suite consolidates your chat messages, video communication, and projects into a single location while maintaining the security of sensitive and mission-critical communications.

You're just one click away from initiating your first video call. To get started, refer to our step-by-step [video conferencing guide](#).

## 3.2 Explore our apps marketplace

Enhance your Rocket.Chat experience with a [variety of apps](#) that improve collaboration, boost productivity and help your team get more work done.

### 3.2.1

Expand video conferencing alternatives with [Zoom](#)



### 3.2.2

Boost DevOps productivity with [Bitbucket](#) or [Bamboo](#)



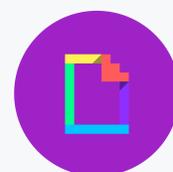
### 3.2.3

Create easy to launch [Polls](#) within a specific channel



### 3.2.4

Add some fun to teamwork through [GIPHY](#) or Imgur



## Step 4: Check out our top 3 flexibility features

Because Rocket.Chat is open source, it's flexible enough to fit into the most unique use cases.

For starters, here are 3 features most companies find invaluable:

### 4.1

Now that you've been messaging other users in Rocket.Chat, take a moment to [check out your message auditing panel](#) where you can review messages between users.

### 4.2

[Integrate tools or services](#) to ease everyday workflows.

### 4.3

Leverage our [white-labeling capabilities](#) to make Rocket.Chat look and feel exactly like your organization.

## Step 5: Ramp up data privacy with these 3 capabilities

Rocket.Chat puts data privacy, security and ownership first. It's a secure environment for communication between colleagues, customers, partners and vendors. To get a feel for this, try out these 3 capabilities:



### 5.1

[Enable 2 Factor \(2FA\) authentication](#) to make sure only the right people are granted access to your workspace.

### 5.2

[Turn on end-to-end encryption \(E2EE\)](#) to prevent third parties from accessing your data while it's transferred from one end system or device to another.

### 5.3

[Allow off-the-record \(OTR\) messaging](#) so people can exchange temporary, encrypted messages.

This ensures these types of messages are not even stored in your own Rocket.Chat server.

(To try this, be sure to have users online and engaged in a conversation at the same time)

## Step 6: Dive into user authentication



Ensuring the right individuals have the appropriate access to your Rocket.Chat workspace (and every conversation that goes on within it) is key.

Rocket.Chat makes it possible for you to connect with your Active Directory application or Identity Management System through the following:

### 6.1

[LDAP](#): Rocket.Chat supports a variety of LDAP capabilities and associated identity management features. You can use advanced settings such as background sync, roles mapping from groups, auto logout and advanced user data sync.

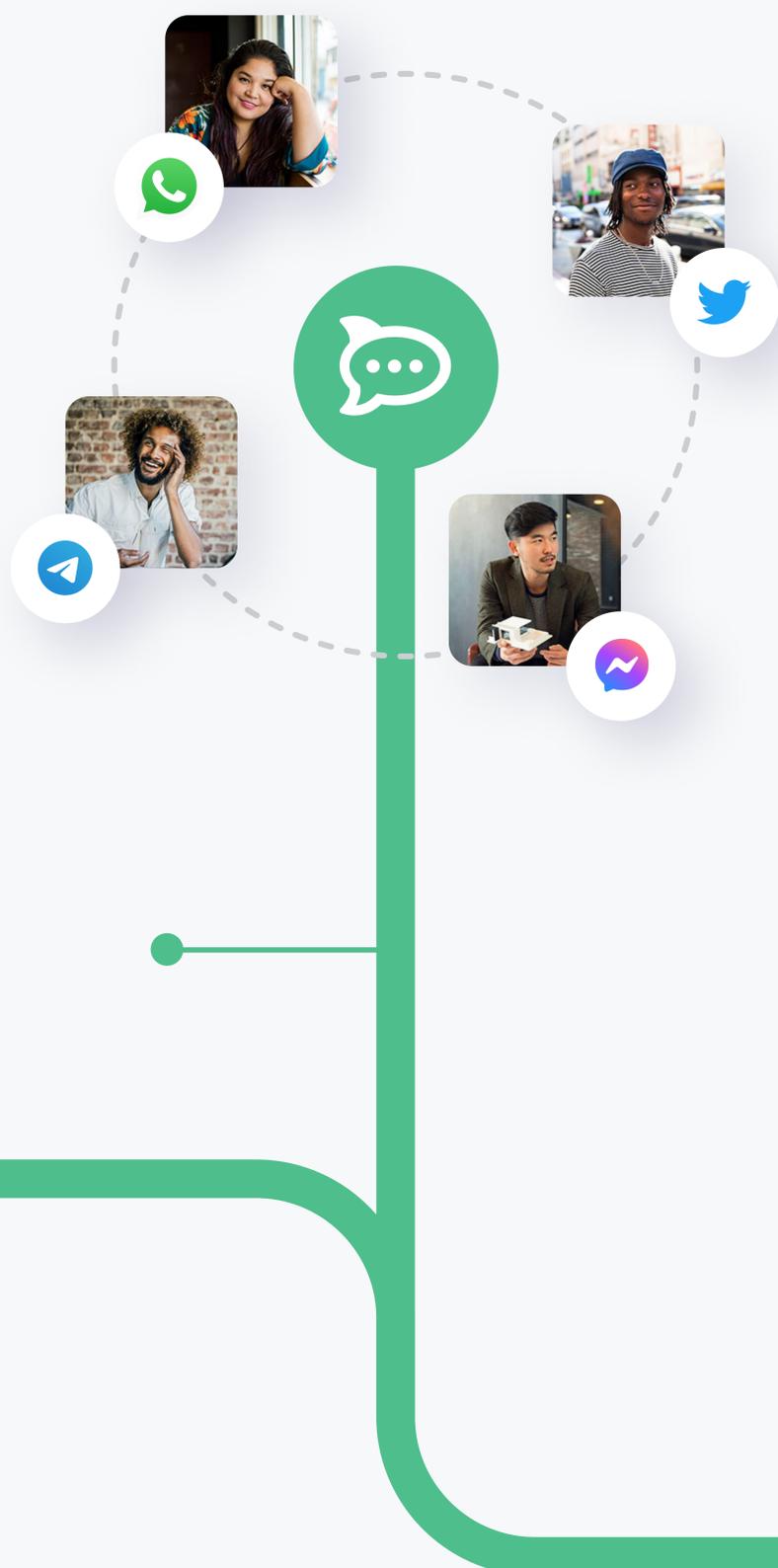
### 6.2

[Oauth](#): Login with Apple, Dolphin, Drupal, Facebook, GitHub, GitHub Enterprise, GitLab, Google, LinkedIn, Meteor, Nextcloud, Tokenpass, Twitter, WordPress.

### 6.3

[SAML](#): Create role mapping from user groups, selecting any field you want to sync with Rocket.Chat plus additional advanced settings.

## Step 7: Open up your workspace for customer communication



Rocket.Chat goes way beyond team collaboration. You can also use it to talk to website visitors plus customers, regardless of which channel they use to connect with you. This capability is called Omnichannel.

You can add a live chat widget to your website or even pull in messages from your company's Twitter DMs, Facebook Messenger, Telegram, WhatsApp, email or SMS - whichever you need, these messages can be pulled into Rocket.Chat and routed to your next available agent. It's your **one** place to manage **all** business conversations.

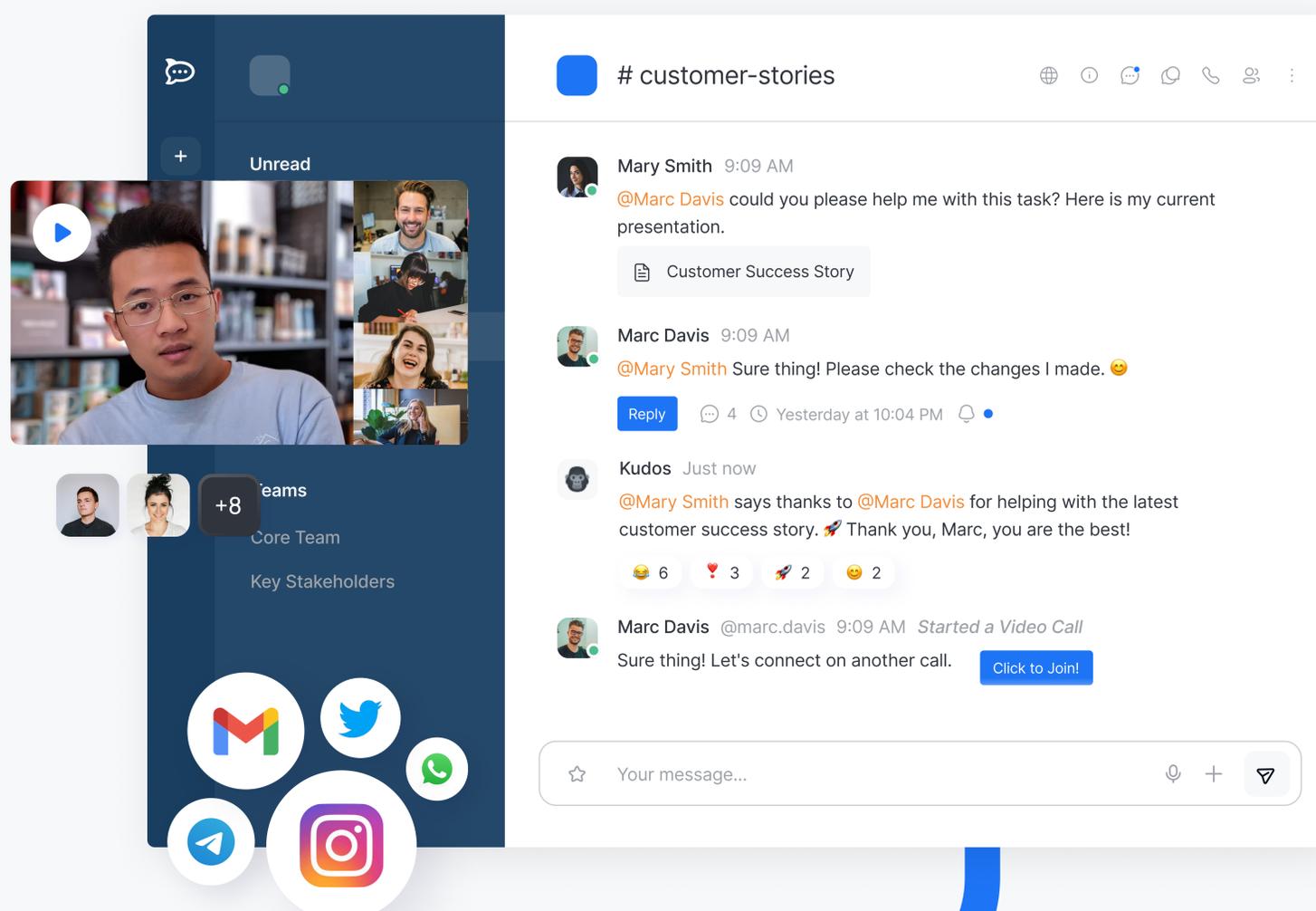
To get started, assign yourself as an [agent](#) and [manager](#).

# Step 8: Set up your first channel integration for customer communication

Now that you have managers and agents assigned, you're ready to start receiving messages from any of the available customer communication channels. Pick a channel, such as [Facebook Messenger](#) or [Telegram](#), and get set up in minutes.

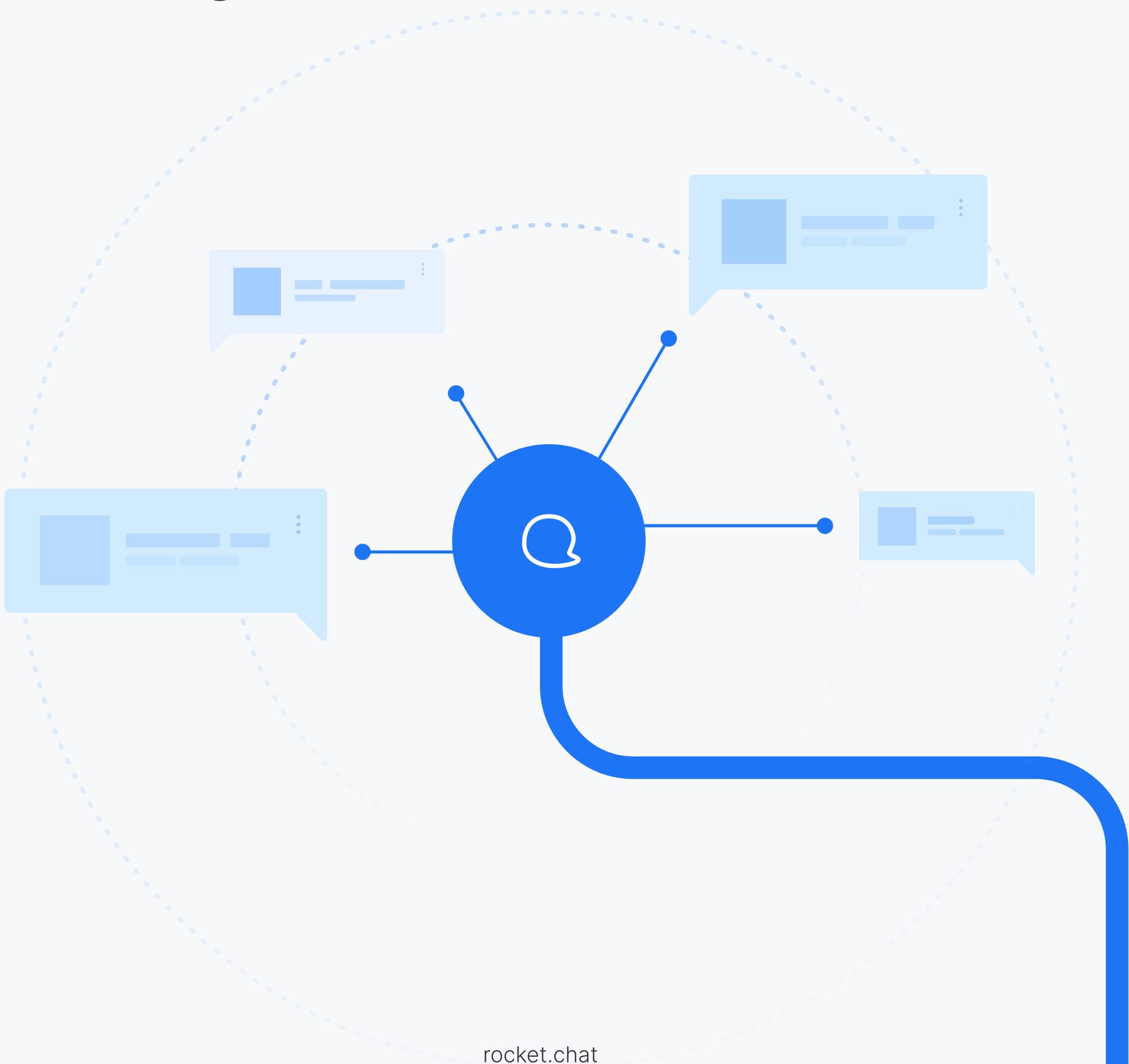
If you choose Facebook, you'll need to have a Facebook Page. If you don't have one yet, you can [create yours in just 30 seconds](#). If you take the Telegram route, you'll need a Telegram account.

PS: [Here are all the channels we support](#).



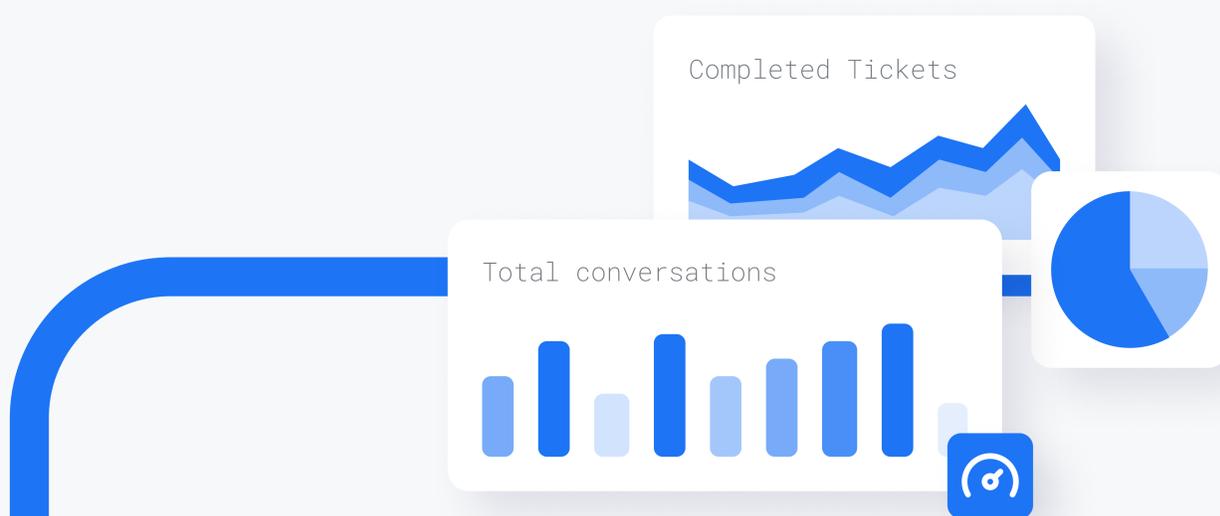
## Step 9: Start greeting customers with a predefined message

Canned responses allow you to save predefined messages that improve customer experience while making your agents' lives easier. [Give your first one a try.](#)



## Step 10: Get insights into your agents' productivity

Your Rocket.Chat workspace comes with an analytics dashboard that allows you to view conversations and agent's performance over any period of time. It gives managers the insights they need in order to make data driven decisions that improve customer experience. [Take a peek.](#)



You have reached the end of the initial 10 steps of your trial. You sure did unlock quite a bit from Rocket.Chat's platform.

Wondering what's next?  
Talk to an expert