

# RingCentral for Outlook

## Installation & User Guide



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# Introduction

## About RingCentral for Outlook

RingCentral® for Outlook® provides seamless integration between your Microsoft Outlook and your RingCentral services.

It offers these features:

- Make or receive calls through the RingCentral phone system directly from your Outlook.
- Find your Outlook and RingCentral contacts combined together on an easy-to-search screen.
- Enable click-to-dial on any phone number in your Outlook, allowing you to spend more time servicing clients and less time dialing.
- Send or receive text messages and see them as conversations.
- Listen to your voicemails directly from your Outlook.
- View calls you've made, received, or missed.
- Schedule a RingCentral Conference and RingCentral Meetings without leaving Outlook.

## About this Guide

This guide is designed for users of RingCentral for Outlook. It shows how to install the application to your Windows computer and how to use the application. This guide also provides some basic troubleshooting tips.

## Basics

For optimal user experience, ensure that:

- You have set the correct number as your RingCentral Direct Number — you will be making and receiving calls from this number through Outlook. You can find RingCentral Direct Number in the RingCentral Portal at **My Settings > Phones and Numbers > Direct Numbers**.
- You are using Microsoft Outlook 2010 or later.
- You are using Windows 7 or later.

# Installation

# Installation

Make sure you have ability to install new software on your Windows computer, as sometimes administrator privileges are required to install software.

Download the latest version of RingCentral for Outlook. Make sure you close all of your Outlook windows if they are open before you run the installation file. Run the installation .MSI file and follow the prompts. (See Figure 1.)

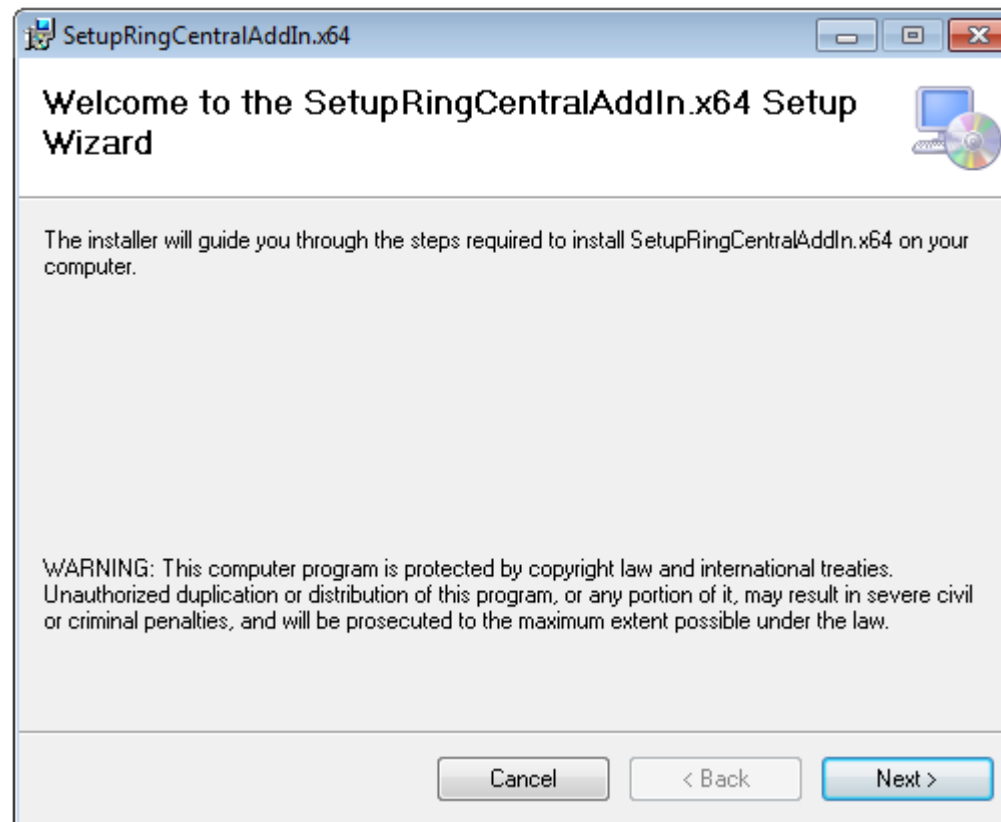


Figure 1

# Verify Installation

After the app is installed, open Outlook; you should see Login to RingCentral on the right side of your Outlook. (See Figure 2.)

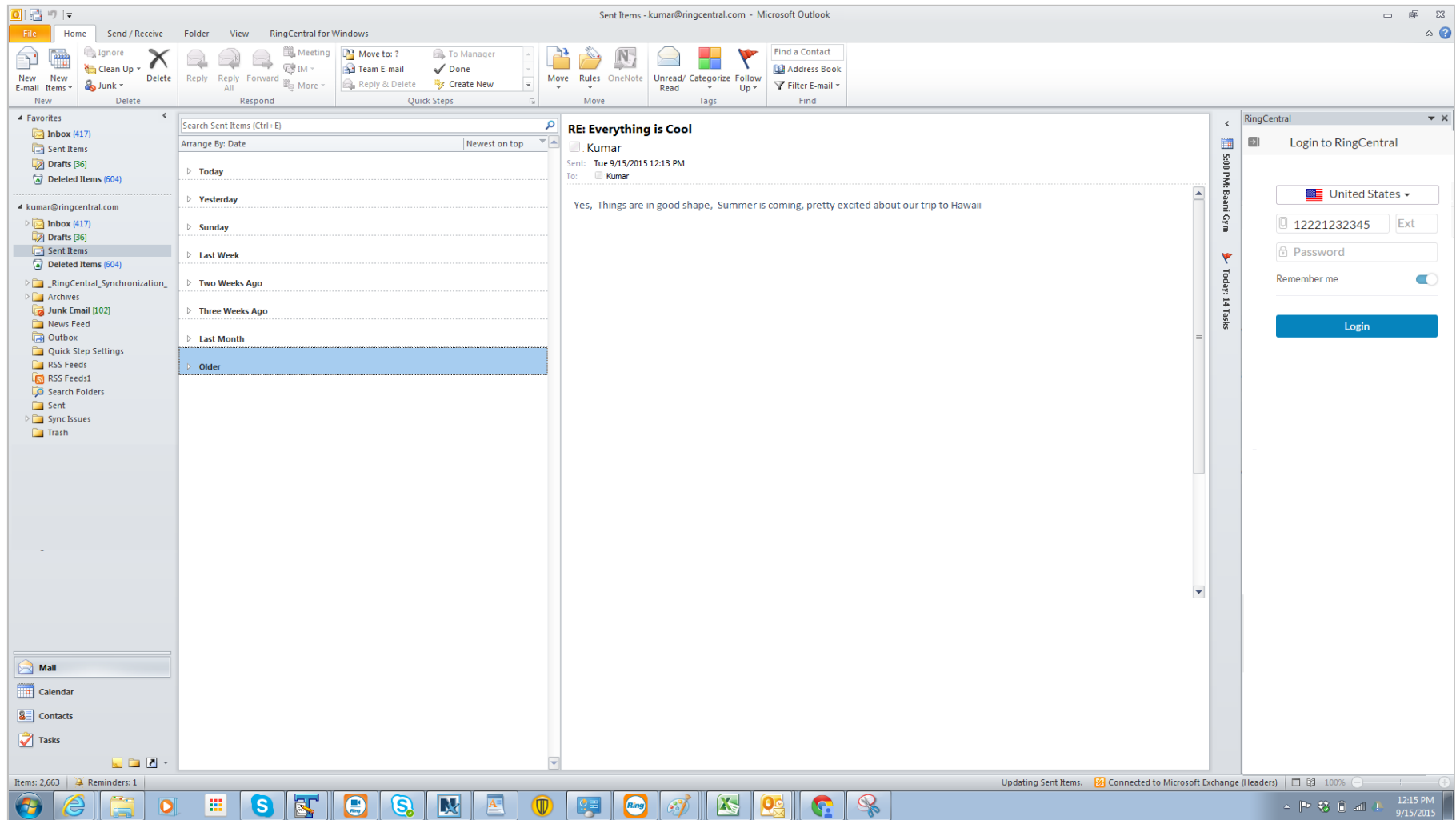


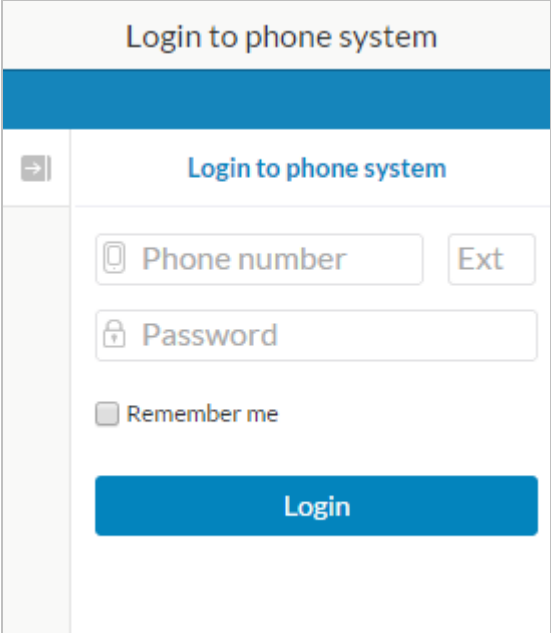
Figure 2



## Login

To log in to RingCentral for Outlook, use your RingCentral Direct Number for the phone number and your RingCentral password. RingCentral for Outlook is available for all RingCentral customers.

You can select **Remember me** to stay logged in to RingCentral for Outlook for one week.  
(See Figure 3.)



The screenshot shows a web-based login form titled "Login to phone system". The form has a blue header bar with the title. Below the header, there is a sidebar on the left with a right-pointing arrow icon. The main content area contains the following elements: a blue header bar with the title "Login to phone system", a "Phone number" input field with a phone icon, an "Ext" input field, a "Password" input field with a lock icon, a "Remember me" checkbox, and a large blue "Login" button.

Figure 3

## Collapse and Retract Button

When RingCentral for Outlook is not in use, you can collapse it for more reading area in your Outlook. (See Figures 4 and 5.)

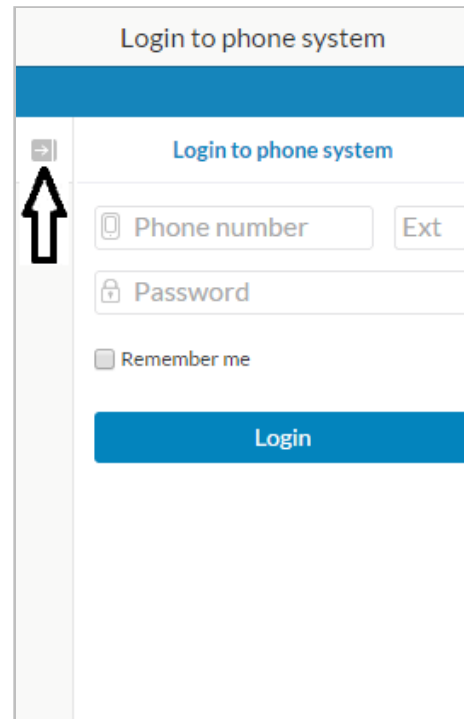


Figure 4

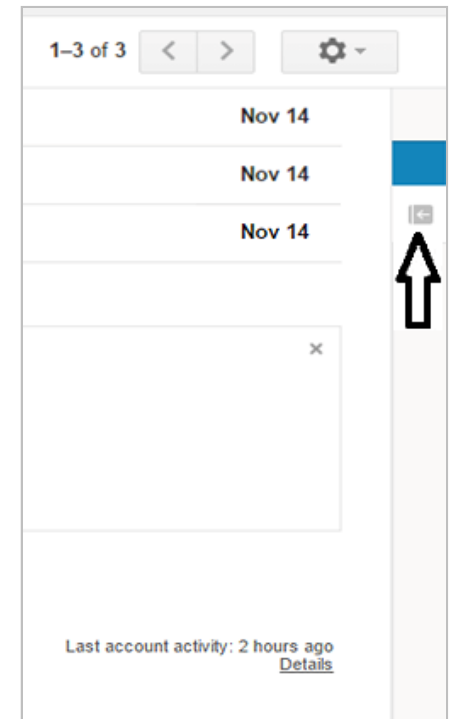


Figure 5

## Options

You can also get to these options any time by clicking on the gear icon in the top navigation bar. On the **Settings** screen you can:

**Dial from extension**—allows you to make an outbound call using your RingCentral company phone number and extension when you do not have a direct phone number.

**Click to dial**—enables click-to-dial for Outlook so that you can select a phone number from an email and right-click to initiate a call.

(See Figure 6.)

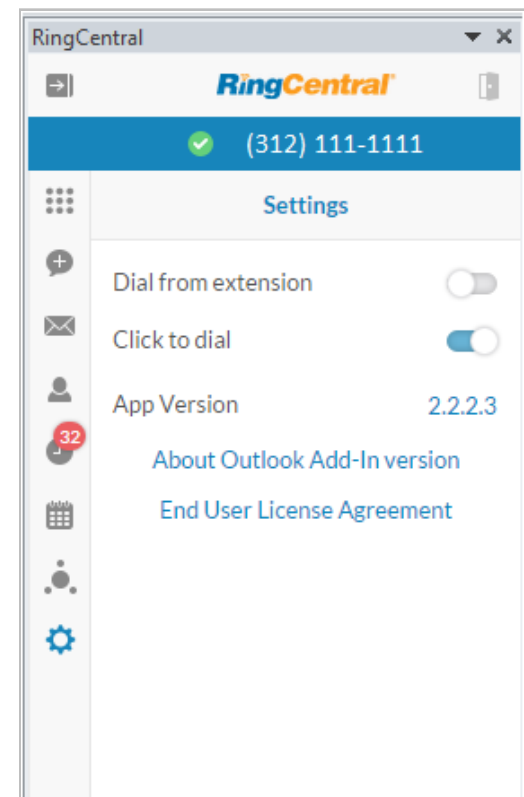


Figure 6

# Dialer

You can bring up the dialer by clicking the dialer icon from the navigation bar. In order to make an outbound call you can either use the number buttons on the dial pad or type a number directly in the text box.

## Make Outbound Call With

You can make an outbound call with either your browser or your RingCentral phone.

**Browser**—you can use your computer to make and receive calls. When you use this option make sure you have a working microphone and speaker. You can also select a caller ID that will be displayed to your call recipient. Please note your inbound call will also ring your computer when selecting this option.

**Other phone**—you can use your RingCentral phone such as your desk phone or RingCentral softphone on your computer.

(See Figures 7 and 8.)

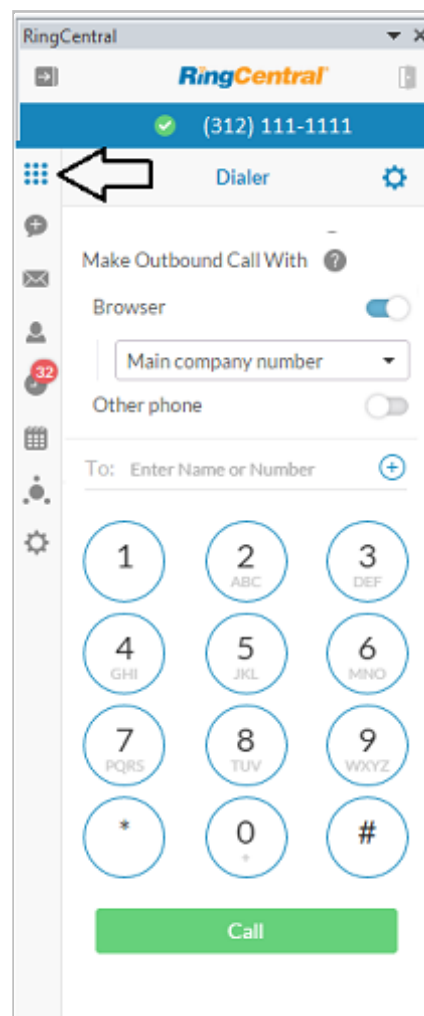


Figure 7

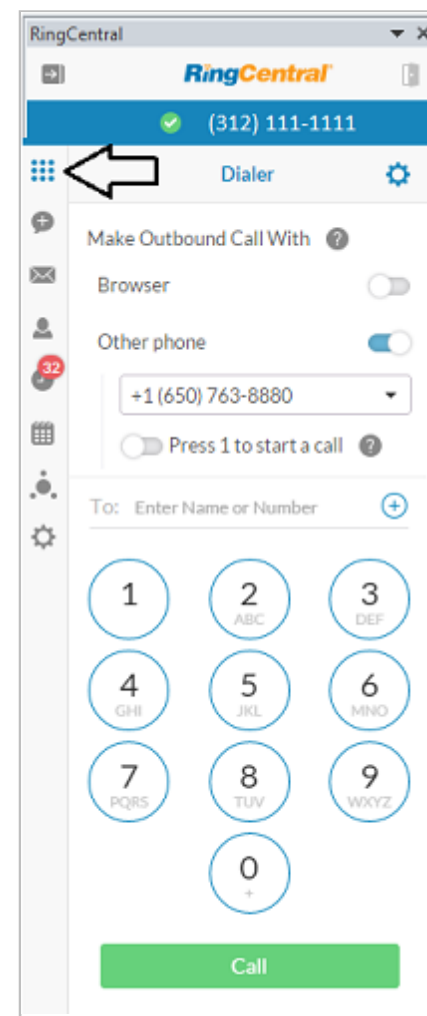


Figure 8

# Click-to-Dial

You can also use the click-to-dial feature to make an outbound call. Once you are logged in successfully to RingCentral for Outlook, all phone numbers in your email can be selected to bring up a context menu with the “Call with RingCentral” option that, when clicked, will dial that number. (See Figure 9.)

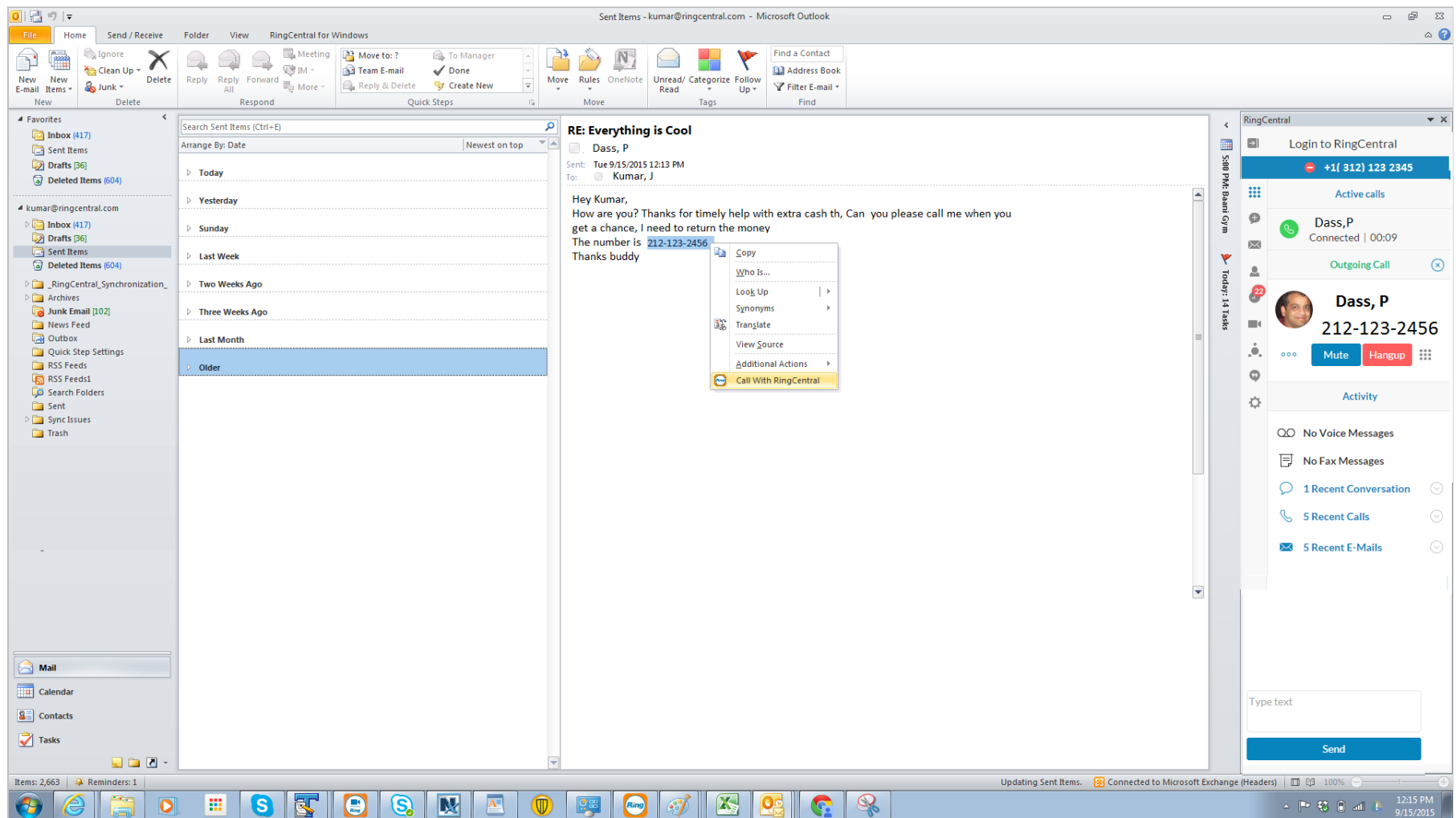


Figure 9

## Outgoing Call

Once you click on a phone number as described in **Click to Dial** above, or use the dial pad to make an outgoing call, RingCentral for Outlook shows the status of your call and your selected RingCentral device will ring. (See Figure 10.)

If you choose to use a RingCentral device rather than browser after you accept the call on your RingCentral device, you may be prompted to press 1 if you had selected the check box on your setting screen.

After you accept the call (by pressing 1 or simply by picking up the phone depending on your settings), the destination phone will ring. (See Figure 11.)

When the call is connected and the destination phone rings, the call status is shown on RingCentral for Outlook. (See Figure 12.)

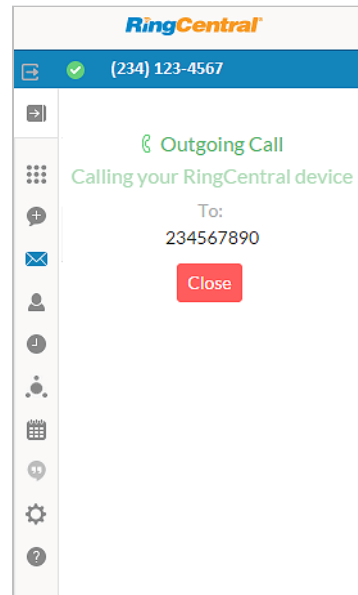


Figure 10

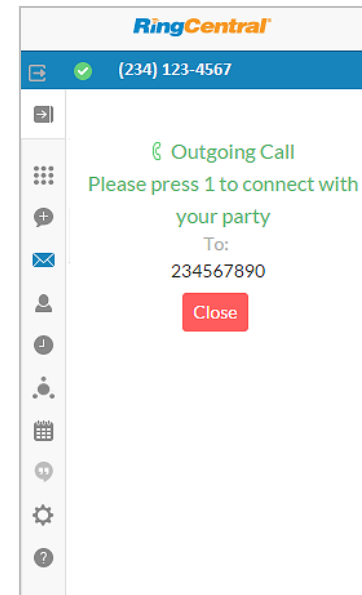


Figure 11

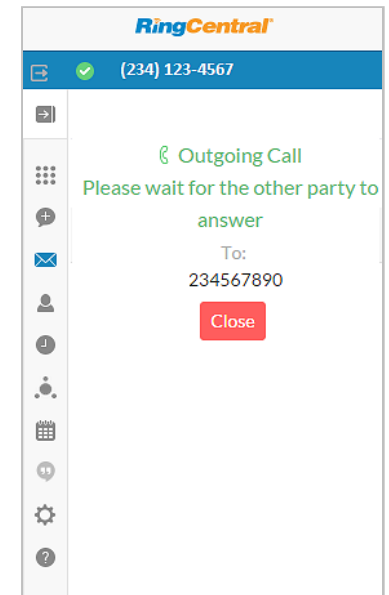


Figure 12

## Incoming Call

When you have an incoming call, RingCentral for Outlook will show you the call indicator. If you are using the browser call option then you can take action in Outlook itself (shown in Figure 13); otherwise you can answer the call on your RingCentral device.

Once the call is connected, the call timer starts.

When you click the **Close** button you are returned to the screen you were on prior to the call. (See Figure 14.)

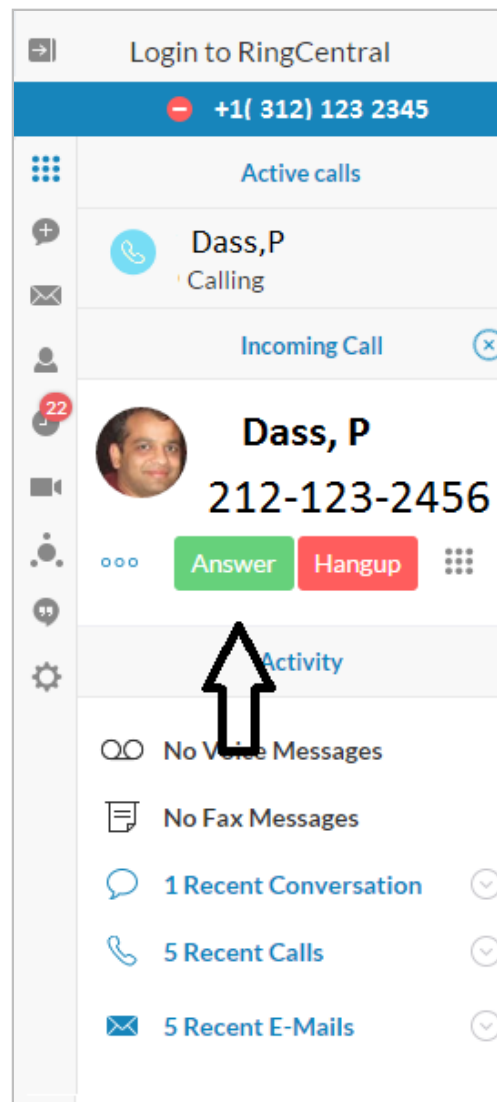


Figure 13

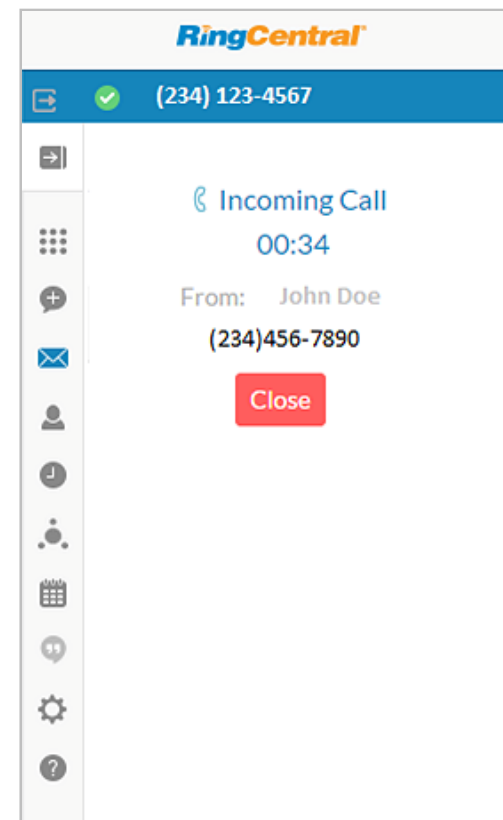



Figure 14


## Browser Call Control

When you have selected a browser for call handling and you are on a call, either incoming or outgoing, RingCentral for Outlook presents you with call control options.

**Mute**—the **Mute** button allows you to mute your speaker and microphone.

**Hangup**—the **Hangup** button allows you to hang up the phone.

Clicking the  icon opens up additional call controls (See Figure 15.)

Clicking the  icon opens up the dial pad, which allows you to enter digits when on a call—for example, when calling a certain 800 number and getting a voice prompt to “press 1 for customer support”. (See Figure 16.)

**Transfer**—the **Transfer** button allows your call to be forwarded to a different phone or extension.

**Flip**—the **Flip** button allows your call to be switched to a different RingCentral device.

**Record**—the **Record** button allows you to record an active call.

**Hold** — Puts an active call on hold.

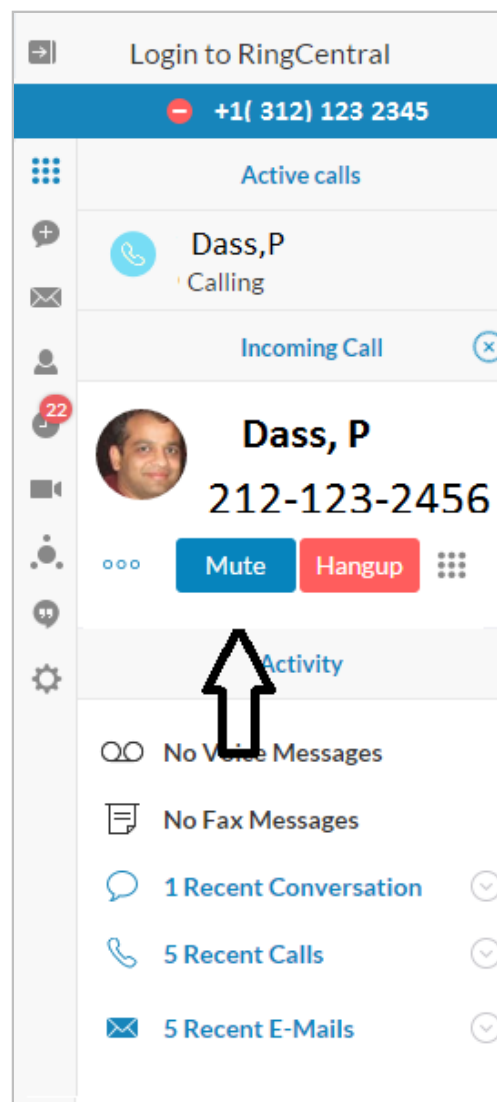


Figure 15

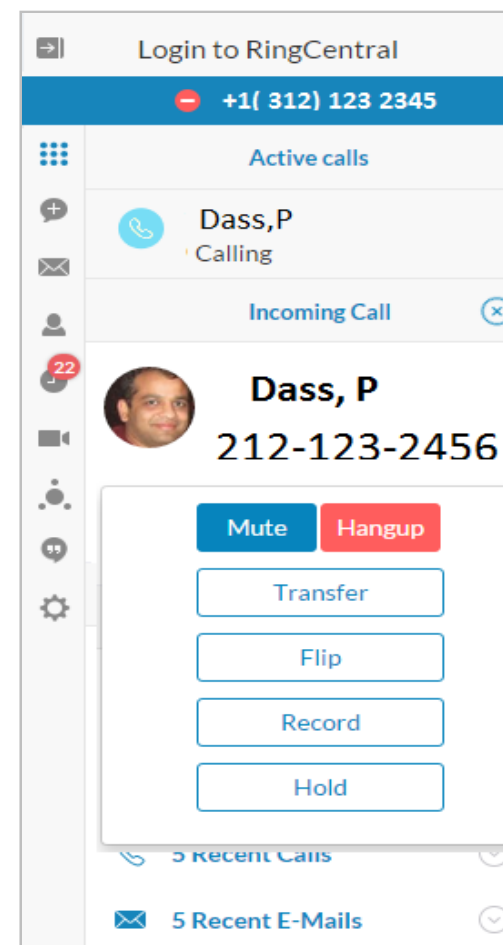


Figure 16



## New SMS

The **New SMS** screen allows you to send a text message to your Outlook contacts, your company colleagues, your personal contacts, or any other phone number. The screen allows you to select more than one contact or phone number in case you want the same message to be sent to multiple recipients. (See Figure 17.)

As you start typing in the “To” field, RingCentral for Outlook will search across your RingCentral Corporate Directory, RingCentral Personal Contacts, and your Outlook Contacts to try to find a match. (See Figure 18.)

After the message is sent, you will see the **Conversation** screen. See the **Message Conversation** section for more details.

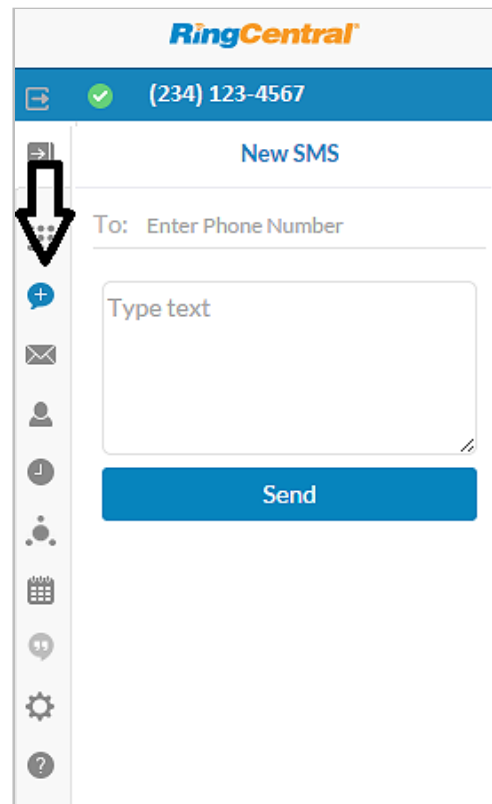


Figure 17

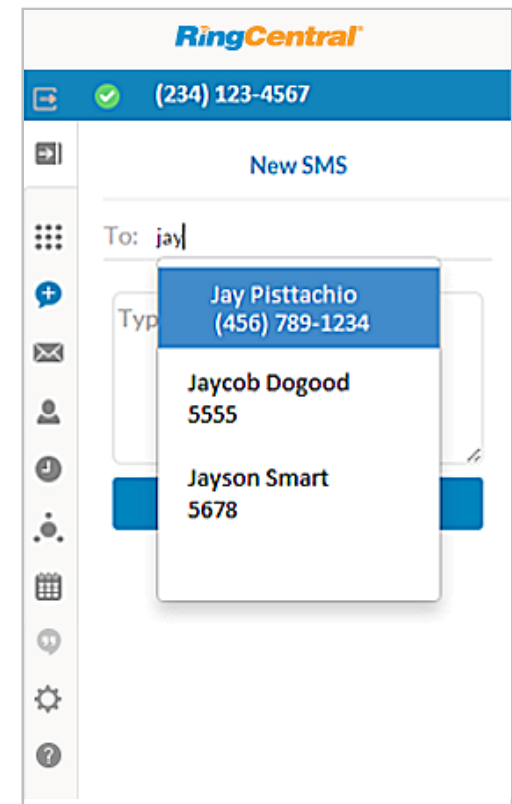


Figure 18

# Messages

Select tabs to view your **Voice**, **Fax** and **Text** messages on the **Messages** screen. This screen displays all of the messages that you have received for the past week.

The **All** tab displays all of your messages combined. (See Figure 19.)

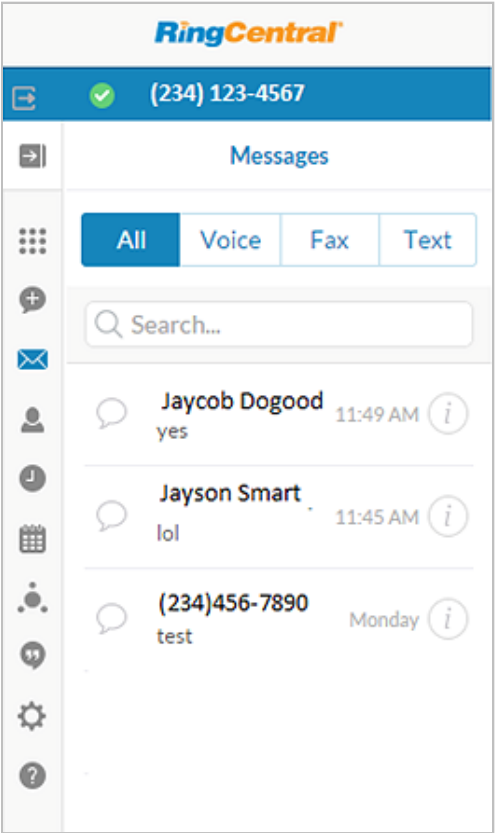


Figure 19

## New Message Indicator

When you receive a new message, the RingCentral for Outlook **Messages** screen displays a new message indicator as a number inside a **red** field. The number indicates the total number of messages that are new (that is, not heard or read). (See Figure 20.)

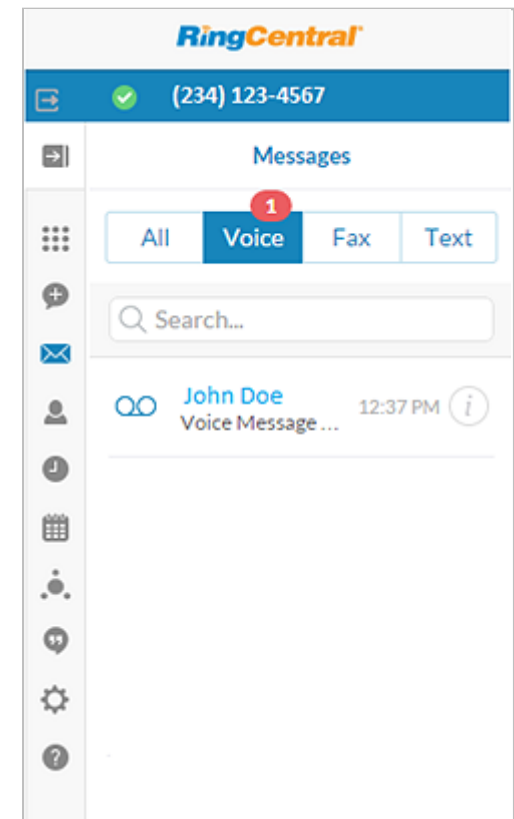


Figure 20

## Message Details

The **Message Details** screen shows:

- Direction of the message (Incoming or Outgoing).
- Contact name (if available).
- Phone number.
- Message Received or Sent time.
- A **Call** button that allows you to make a call to your message sender or recipient.
- A **Send Text** button allows you to send a text to your message sender or recipient.
- A **Back** button allows you to go back to the message list.

(See Figures 21 and 22.)

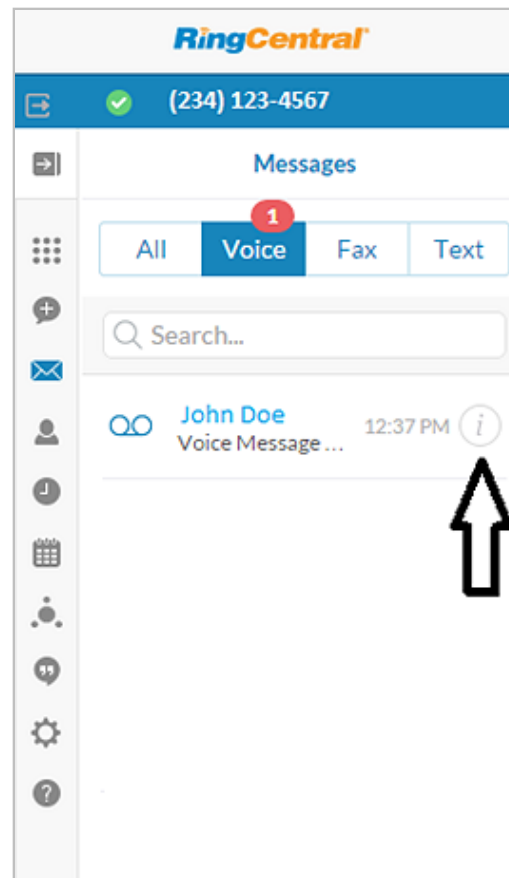


Figure 21

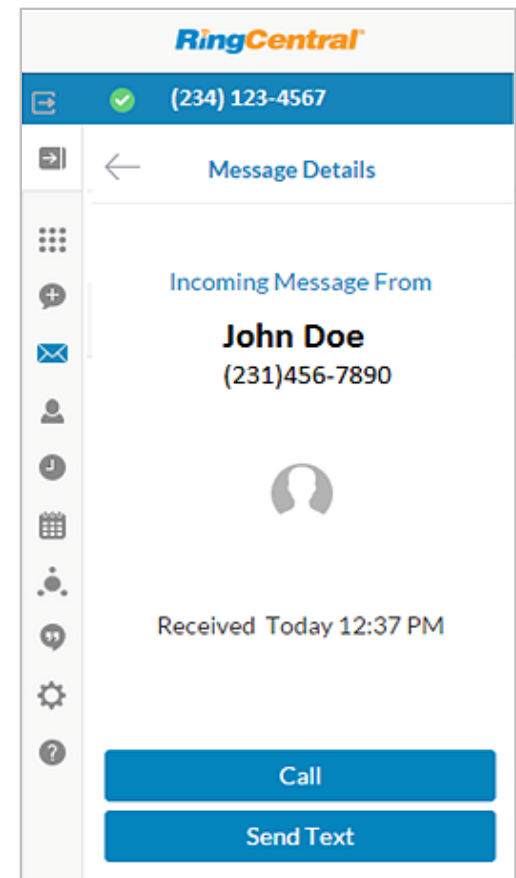



Figure 22

## Voicemail Messages

In order to listen to your voice messages, click on the name or number that appears on the message. A voicemail audio control will pop up.

- The play  button will allow you play your voice message through your computer's audio.
- A voice message duration is displayed.
- You can pause and resume anytime the message is playing.
- You can return a call to the person who left you this message by clicking on the phone icon.
- You can send a text message to the person who left you this message by clicking the balloon icon.
- You can flag this message by clicking on the flag icon.
- You can delete a message by clicking on the delete icon.

(See Figure 23.)

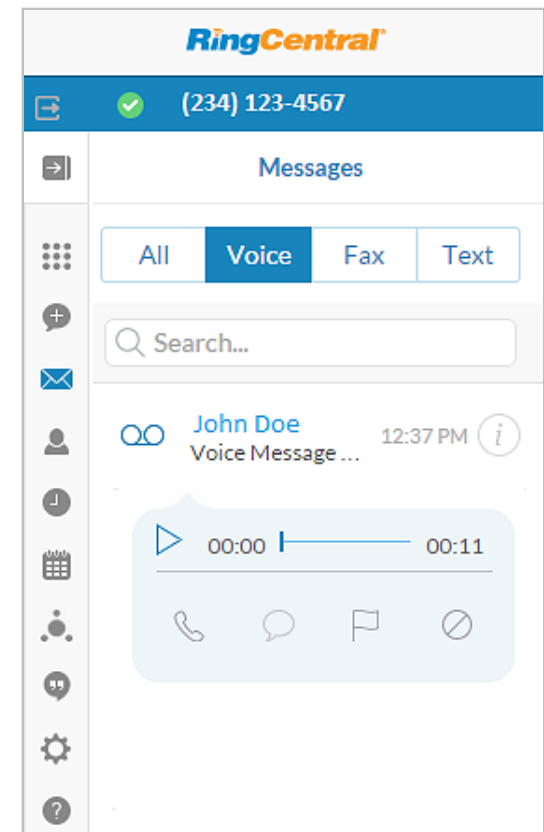


Figure 23

## Fax Messages

To view a fax message, click on the name or number that appears on the message. A fax message control will pop up.

- When you click on the fax icon on the pop up, the fax will open up in your browser.
- Clicking **Delete** will delete the fax message.

(See Figure 24.)

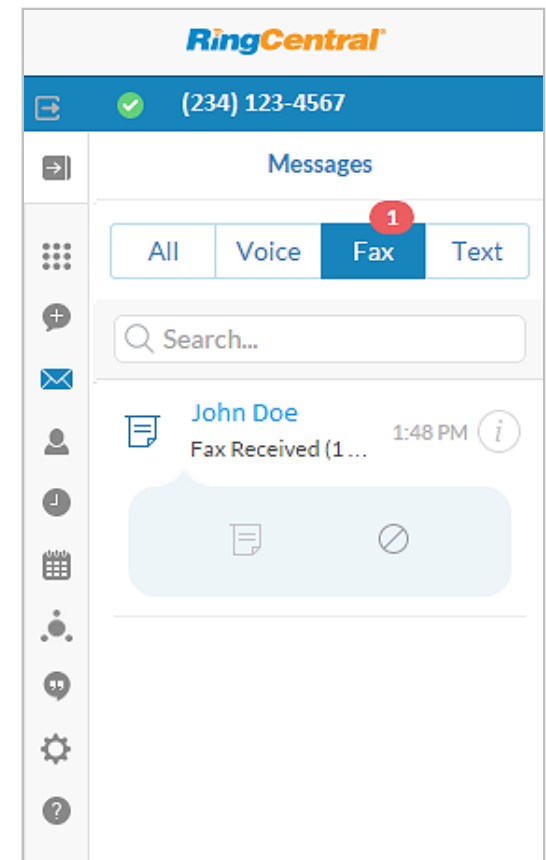


Figure 24

# Text Messages

When you see a list of messages, the list displays the most recent message if the message is part of a conversation.

To view your text message conversation, click on the name or number that appears on the message. (See Figure 25.)

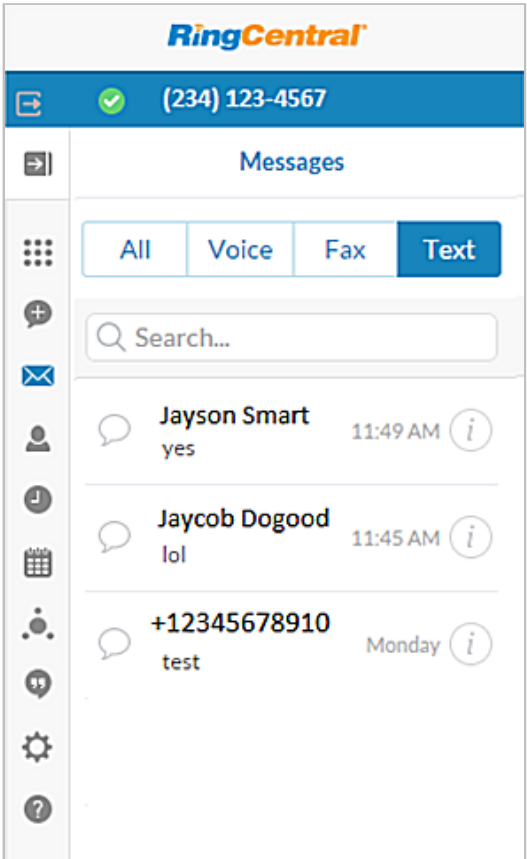


Figure 25

## Message Conversation

Once you are on the conversation screen, you will see messages that are part of this conversation. The messages are sorted by the time they arrived or were sent. Newer messages are displayed at the bottom.

You can send a new message as part of this conversation by typing in the text box and by clicking the **Send** button, or by hitting the **Enter** key.

The back arrow ← will navigate you back to the message list. (See Figure 26.)

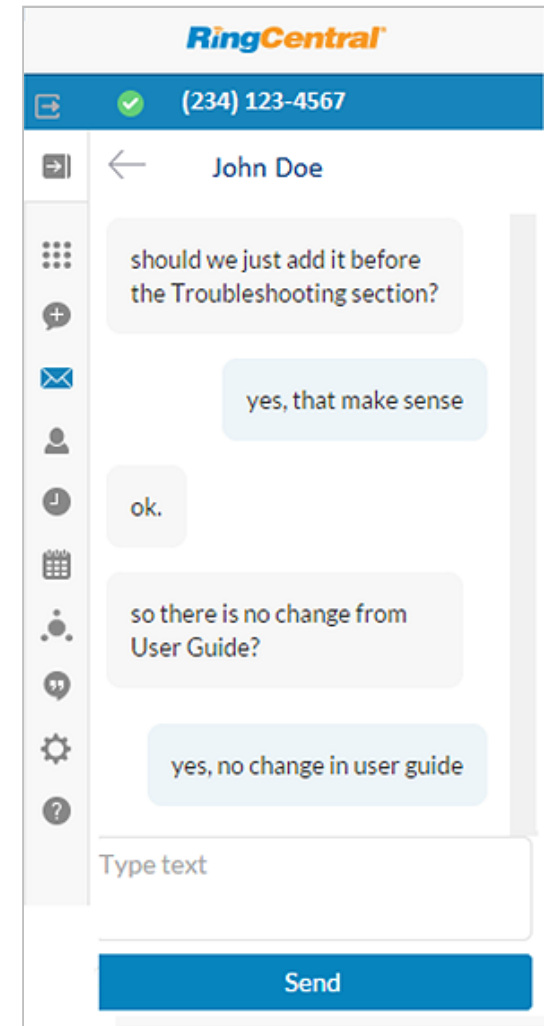


Figure 26



## Contacts

You can access your RingCentral Company Directory, RingCentral Personal Contacts, and Outlook Contacts from RingCentral for Outlook.

You can navigate to the **Contacts** screen by clicking on the person icon in the navigation bar. The screen is initially blank; type in the search box to find your contact. (See Figure 27.)

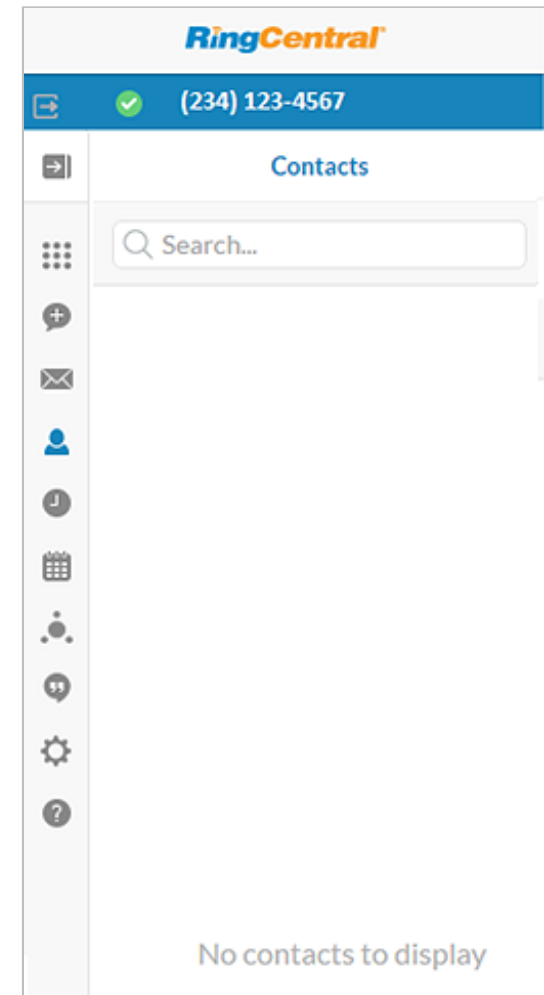


Figure 27

## Contacts Search

As you start typing in the search text box, RingCentral for Outlook will simultaneously search your Outlook, Personal, and Company Directory contacts and display them on your **Contacts** screen.

(See Figure 28.)

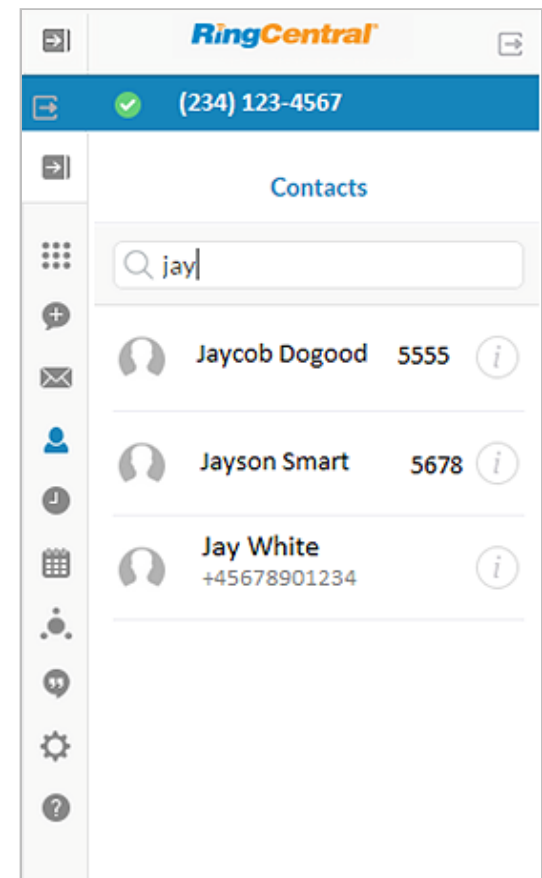


Figure 28

## Contact Details

On the **Contacts** screen (previous page) you can click on a name or the info icon ⓘ to view the contact's details: first name, last name, email, and phone number.

On the **Contact Details** screen (this page), when you click the down-facing caret ▼ next to a phone number, it will reverse (^) and the screen will expand with options to initiate a call or send a text message to your contact.

Clicking the back arrow ← on the **Contact Details** screen will return you to the **Contacts** screen and your search results (shown on the previous page).

(See Figure 29.)

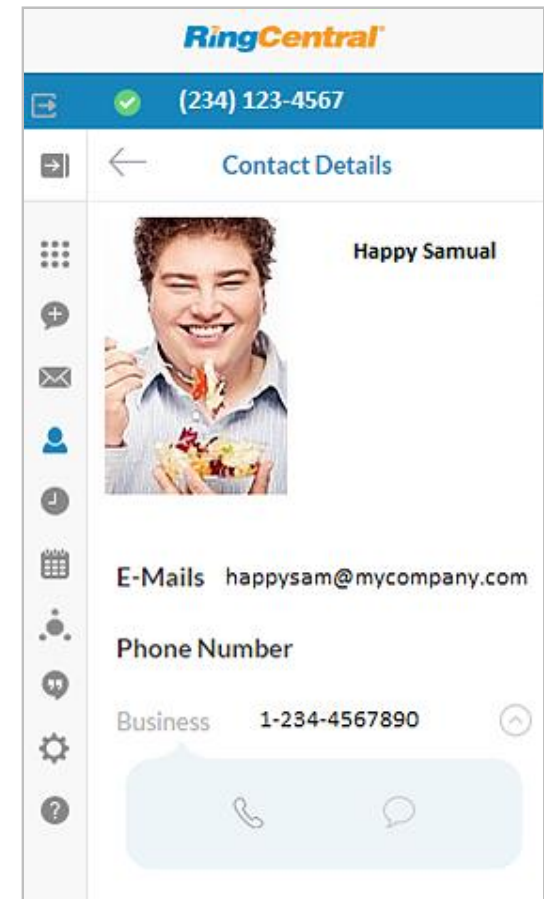



Figure 29



## Call Log

The **Call Log** screen shows a list of all your calls in the last week. Click the clock icon  on the navigation bar to bring up the **Call Log** screen.

The **Call Log** screen is organized into two tabs. The **All** tab displays all of your calls, while the **Missed** tab displays a list of calls that you missed.

The list displays the caller name, caller location, and time of the call. The list of calls is sorted by time when the call was originated, with the newest calls on top.

The screen allows you to search for a call record. By entering a phone number or caller name in the search box, you can filter the call logs according to the search criteria you entered.

A phone icon with an arrow pointing to the right  indicates an incoming call, and an arrow pointing to the left  indicates an outgoing call.

The info icon  on a given call record will allow you to view the call details. (See Figure 30.)

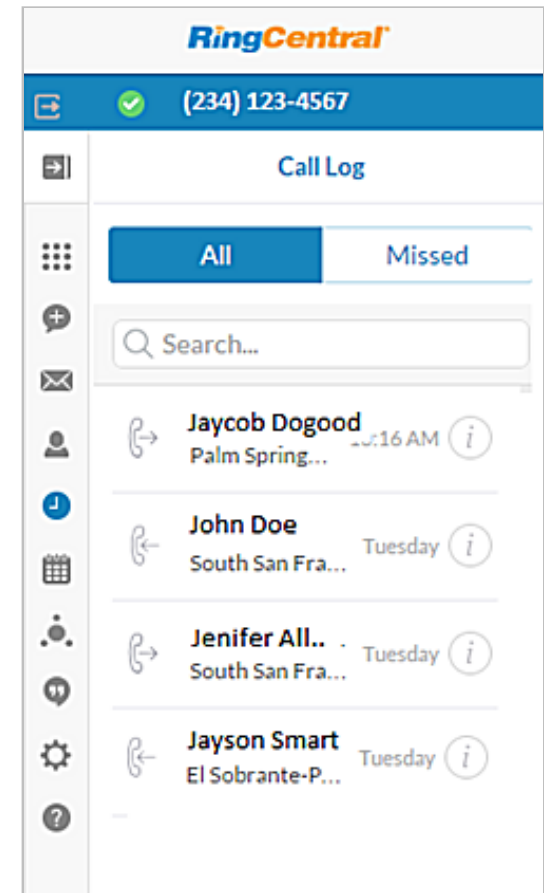


Figure 30

## Call Details

The **Call Details** screen shows detailed call information.

Here you can view the call direction, caller ID, call location, call time, and call duration.

You can also initiate a call or send a text to the caller or person you called.

(See Figure 31.)

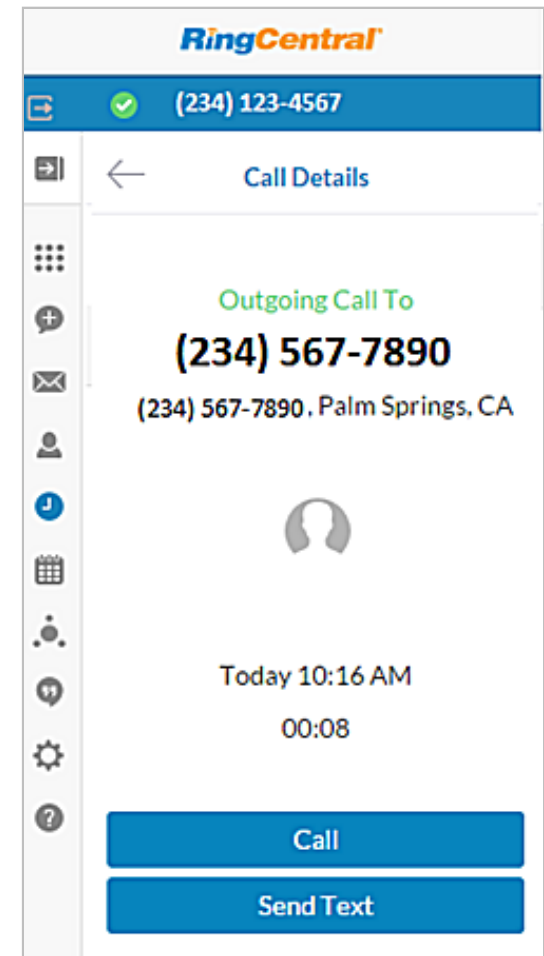


Figure 31

## RingCentral Conference

You can view your RingCentral Conference information or schedule a new RingCentral Conference on the RingCentral **New Conference** screen.

The screen displays the dial-in number, your host code, and the participant code that you distribute to people whom you wish to participate in your conference.

When you select **International participants**, RingCentral for Outlook displays a list of countries along with their respective dial-in numbers.

The list is searchable; you can type in the first few letters of the country name to avoid scrolling through the entire list. You can select the country by selecting the checkbox for that country name.

Clicking **Save in Calendar** will create an Outlook calendar invitation, as described in the next section.

(See Figure 32.)

RingCentral

**New Conference**

Dial-in Number: +1 (267) 930-4000

Host: 564-234-979

Participants: 282-117-489

International participants ☒

Select International Dial-in Numbers

Search...

<input type="checkbox"/> Argentina	+54 3814085011
<input type="checkbox"/> Australia	+61 386720111
<input type="checkbox"/> Austria	+43 12650505
<input type="checkbox"/> Bahrain	+973 16568305
<input type="checkbox"/> Brazil	+55 2123911541
<input type="checkbox"/> Bulgaria	+359 24372638
<input type="checkbox"/> Canada	+1 (647) 499-8281
<input type="checkbox"/> Chile	+56 448909302

Save in Calendar

Conference Commands

Figure 32

## RingCentral Conference—Outlook Calendar Invitation

Once you have created an Outlook Calendar invitation from the RingCentral **New Conference** screen, you'll find that the conference information has been prepopulated into your Outlook Calendar invitation. Here you can interact with your Outlook Calendar invitation just as you normally would; enter your event name, invite guests, or edit the description. (See Figure 33.)

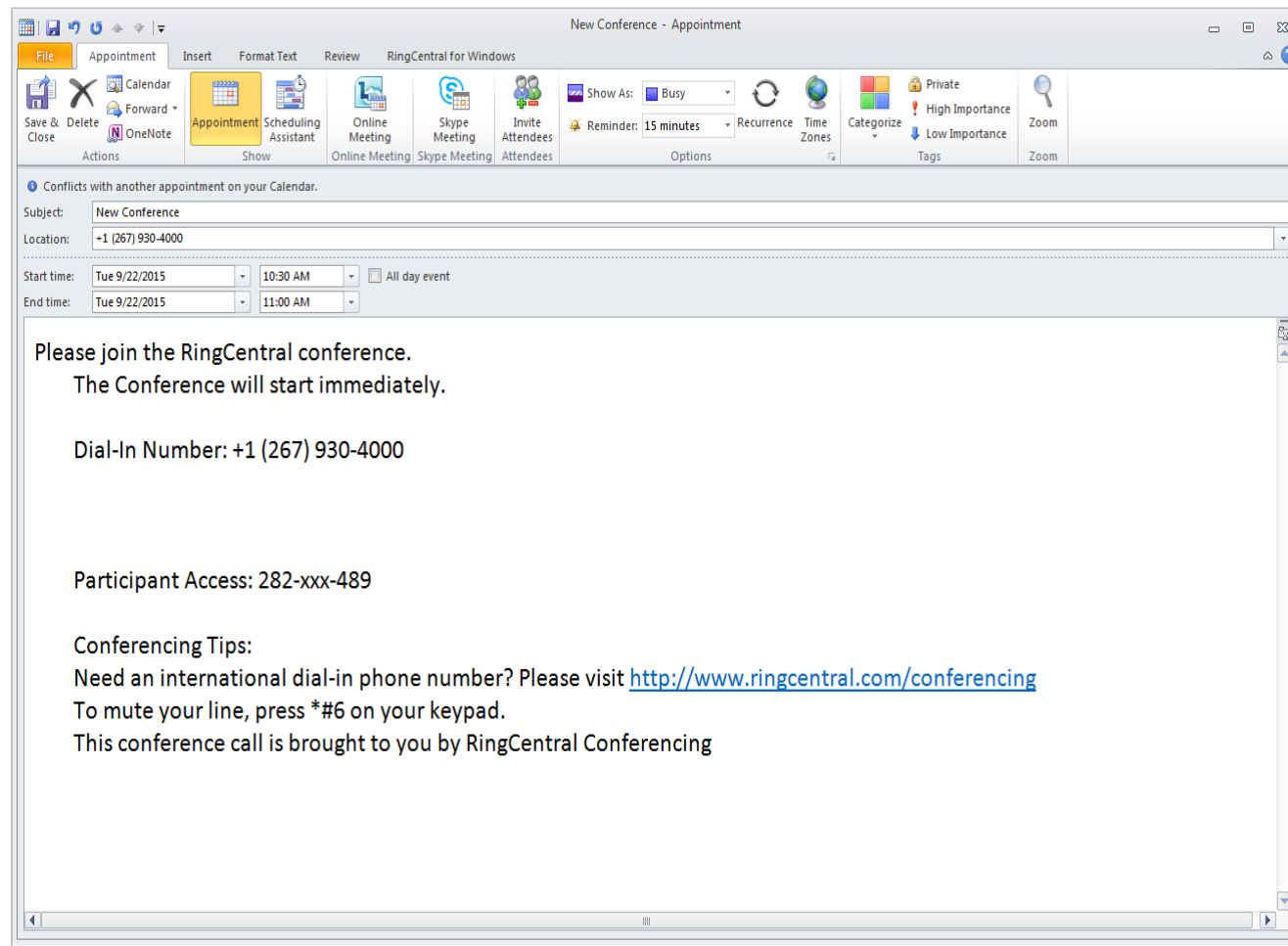


Figure 33

## RingCentral Meetings

You can schedule a **RingCentral Meetings** event with your Outlook Calendar. **RingCentral Meetings** allows you to host meetings with audio, video, or screen sharing. The calendar icon on the navigation bar brings up the RingCentral **New Meeting** schedule screen.

The meeting topic is required.

Select **Recurring Meeting** if you would like that option; otherwise select a single date and time.

Select **Meeting Type** and **Meeting Options**; then click **Create a meeting in Outlook**.

(See Figure 34.)

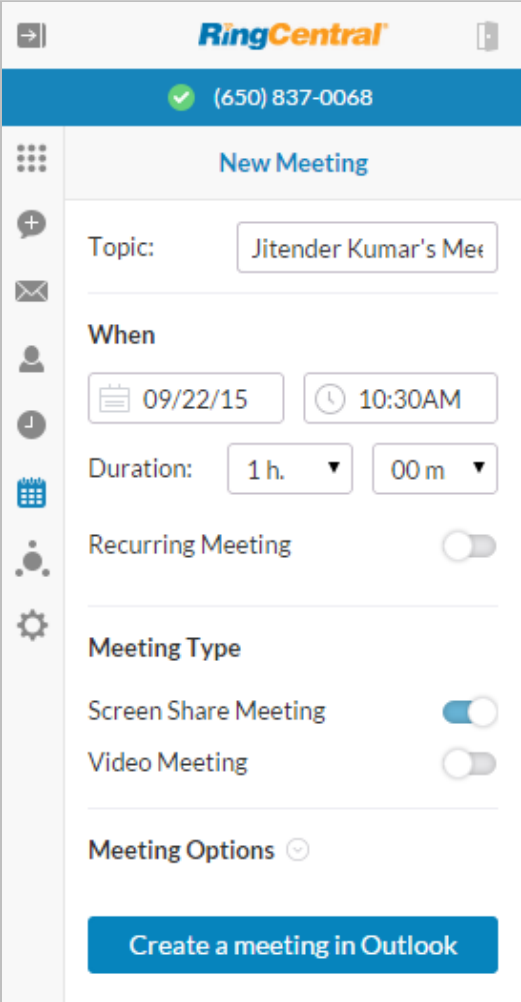
The screenshot shows the 'New Meeting' interface in the RingCentral application. At the top, there's a header with the RingCentral logo and a phone number '(650) 837-0068'. Below this, the title 'New Meeting' is centered. The form includes a 'Topic' field with the text 'Jitender Kumar's Me...'. Under the 'When' section, there are fields for the date '09/22/15' and time '10:30AM'. A 'Duration' section shows '1 h.' and '00 m.' with dropdown arrows. There is a 'Recurring Meeting' toggle switch which is currently turned off. The 'Meeting Type' section has two options: 'Screen Share Meeting' (which is turned on) and 'Video Meeting' (which is turned off). Below this is a 'Meeting Options' section with a dropdown arrow. At the bottom, there is a large blue button labeled 'Create a meeting in Outlook'. On the left side of the screen, there is a vertical navigation bar with icons for home, messages, email, contacts, clock, calendar, people, and settings.

Figure 34



## RingCentral Meetings—Outlook Calendar Invitation

Once you have set up your meeting in RingCentral for Outlook, a new Outlook Calendar invitation will be created for you, prepopulated with the information you have specified. You will see the RingCentral Meeting information is also prepopulated in your Outlook Calendar invitation.

(See Figure 35.)

The screenshot shows an Outlook calendar invitation window titled 'Kumar's Meeting - Meeting'. The ribbon includes 'File', 'Meeting', 'Insert', 'Format Text', 'Review', and 'RingCentral for Windows'. The 'Meeting' tab is active, showing options like 'Appointment', 'Scheduling Assistant', 'Online Meeting', 'Skype Meeting', 'Cancel Invitation', 'Address Book', 'Check Names', and 'Response Options'. The 'Options' group includes 'Show As: Busy', 'Reminder: 15 minutes', 'Recurrence', 'Time Zones', 'Room Finder', 'Categorize', and 'Tags'. A message states: 'Invitations have not been sent for this meeting. Conflicts with another appointment on your Calendar.' The 'To...' field is empty. The 'Subject' is 'Kumar's Meeting' and the 'Location' is 'https://ringcentral.zoom.us/j/1489172223'. The 'Start time' is 'Tue 9/22/2015 10:30 AM' and the 'End time' is 'Tue 9/22/2015 11:30 AM'. The 'All day event' checkbox is unchecked. The main body of the invitation contains the following text: 'Kumar is inviting you to a scheduled RingCentral meeting. Topic: Kumar's Meeting Time: September 22, 2015 10:30 -07:00 Meeting type: screen share Join from PC, Mac, iOS or Android: <https://ringcentral.zoom.us/j/148917xxx23> Or join by phone: Dial: 165083xx Meeting ID: 148917xx23 International numbers available: <https://meetings.ringcentral.com/teleconference>

Figure 35

# Troubleshooting

**Q: I can't see RingCentral for Outlook when I open Outlook. What is the problem? Does it require some special permission?**

A: No, RingCentral for Outlook does not require any special permission. Make sure RingCentral for Outlook is installed correctly and is enabled—you can check this by going to the Outlook menu, and then to **Outlook Options > Add-Ins**. Also make sure **RingCentral Outlook Add In** is checked.

**Q: I would like to disable this feature for now.**

A: Go to Windows Control Panel and Uninstall RingCentral for Outlook.

**Q: Which operating systems are supported?**

A: The following operating systems are supported: Windows 7 and above.