



RingCentral for Microsoft Teams

Embedded App 2.0

User Guide



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Introduction

This document outlines the features offered by RingCentral EmbeddedApp for Microsoft Teams. This next-generation integration will boost your productivity and provide an easy way to communicate and collaborate with your team members by placing phone calls, you can also manage call queues, look up contacts, and do much more!

In an overview, the features offered are

1. A redesigned, revamped, and recharged RingCentral embedded app for Microsoft Teams on desktop and web.
2. The new plugin replaces the requirement for users to download the RingCentral MVP desktop app.
3. Unified contact search from both RingCentral and Microsoft directories
4. Send and receive SMS and faxes
5. Get notifications when you miss a call, receive a new text or voicemail, and more
6. Customize RingCentral phone settings right without leaving Microsoft Teams

Prerequisites

To get started with the next-generation embedded app, please ensure the following applications are installed on your devices.

For desktop and web,

1. Microsoft Teams desktop or web app
2. RingCentral for Microsoft Teams Embedded App
3. RingCentral for Microsoft Teams Desktop plugin

For mobile,

1. Microsoft Teams mobile app
2. RingCentral for Microsoft Teams Embedded App
3. RingCentral mobile app

The supported OS versions for the desktop plugin are as follows

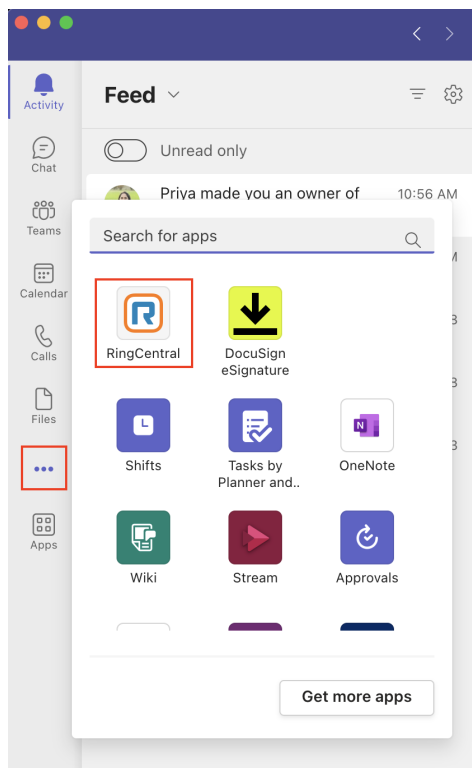
1. Windows 8.1 (64-bit), or later
2. macOS 10.13 (High Sierra), or later
3. Intel Skylake-class 6th Gen i3, i5, or i7 processor, or later
4. AMD Excavator-class (2015) processor, or later
5. At least 8 GB of RAM

Embedded App installation

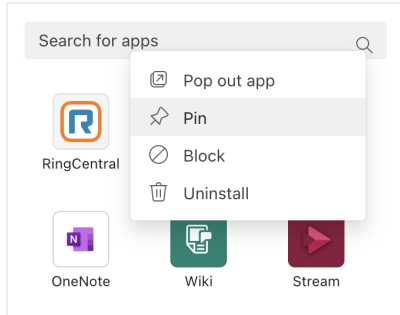
There are two ways in which you can install the RingCentral for Microsoft Teams Embedded App

Pre-installed by your IT administrator:

If the RingCentral Embedded App has been installed by your IT administrator, you can locate the app by clicking on the 3 dots icon on the left side menu of your Teams desktop or web app.



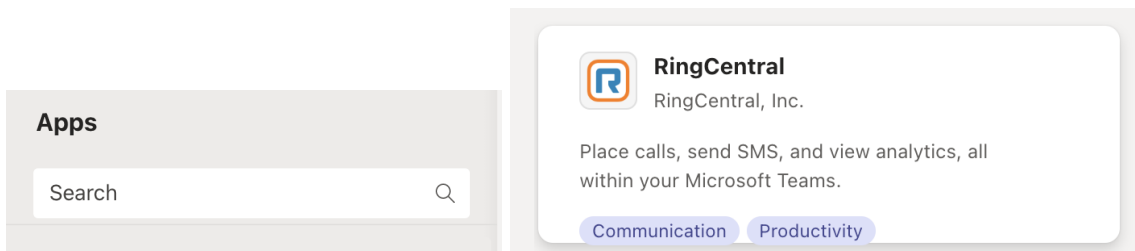
For better and easier access to the embedded app, please pin the app.



Self-installation:

You can search for the RingCentral Embedded app from within your Teams desktop or web app or you can install it from the Microsoft AppSource by clicking [here](#).

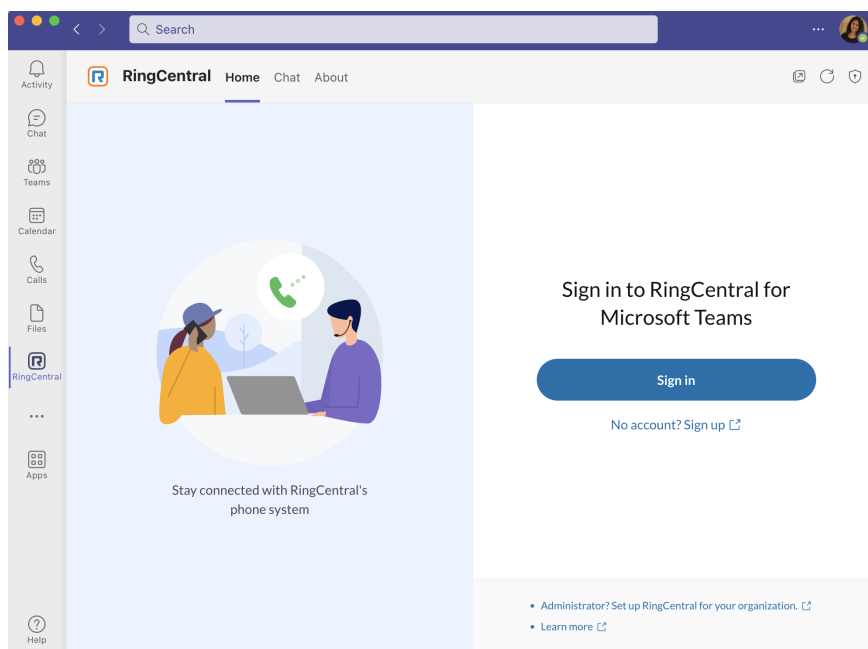
To find the app within Teams, click on the **Apps** icon from the left-side menu  and search for **RingCentral** and click **Add**



Important note: It is highly recommended that your administrator must install the embedded app as they can grant the necessary permissions between RingCentral and Microsoft so you can utilize all features of the embedded app.

In case you have installed the app from the Microsoft AppSource, contact your IT admin to grant those permissions. For more details, please refer to Step 1 in the [admin guide](#).

The new sign-in experience will ask you to enter your RingCentral credentials and proceed with using the embedded app.

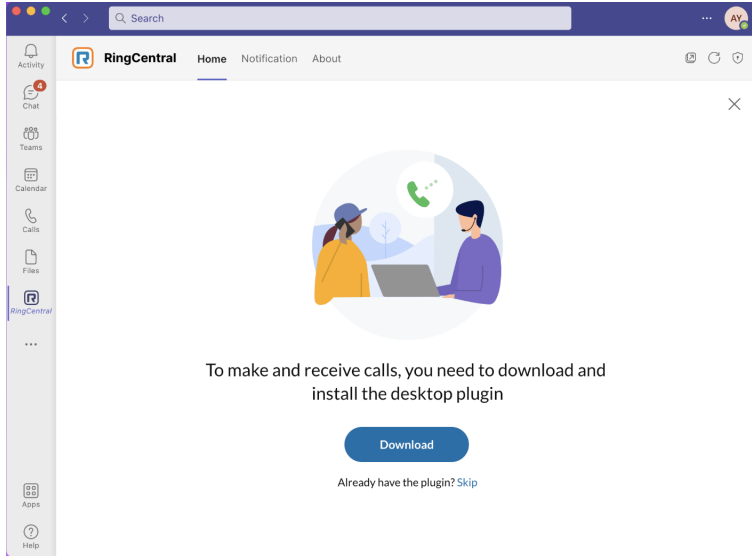


Desktop plugin installation

To pair with the RingCentral embedded app, RingCentral also offers a headless application called the RingCentral for Teams desktop plugin to make and receive phone calls, and manage active call controls.

The desktop plugin resides on your desktop and runs as a background application. Whenever you initiate an outgoing call, the desktop plugin is launched to display the active call controls such as mute, hold, hangup, etc as well as displays call controls to answer or ignore whenever there is an incoming call.

If your IT administrator has not already deployed the desktop plugin, then the embedded app will detect it and display a message as shown below. You can click on the **Download** button to download and install the desktop plugin.



You can also manually install based on your OS by clicking on the links below

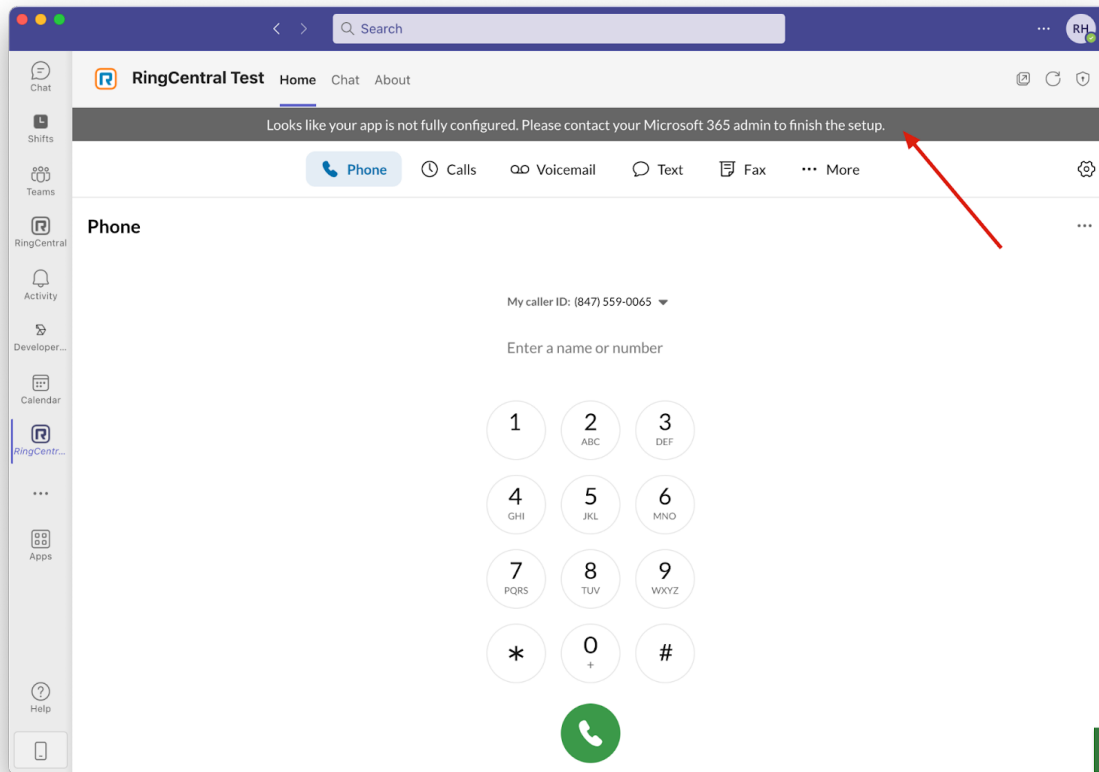
- Windows (32/64 bit):
<https://teams.ringcentral.com/assets/desktop-plugin/rc/latest/windows/RingCentralForTeamsDesktopPlugin.exe>
- Mac (Apple/Intel chipset):
<https://teams.ringcentral.com/assets/desktop-plugin/rc/latest/mac/RingCentralForTeamsDesktopPlugin-x64.pkg>

Note: Ensure to enable microphone permissions if requested by the app during installation.

Contact your admin for granting permissions

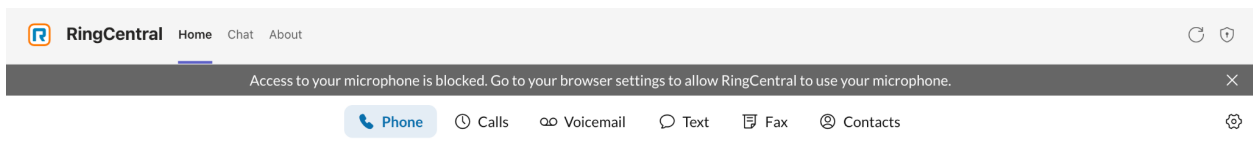
If you are seeing a message similar to the image shown below, it means your IT administrator did not grant the necessary permissions between RingCentral and Microsoft.

When the permissions are not granted, Microsoft contacts sync, and the notification service features are disabled. Please contact your IT administrator to enable them. For more details, please refer to Step 1 in the the [admin guide](#).

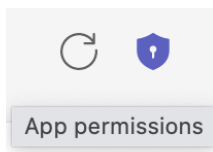


Enable media permissions

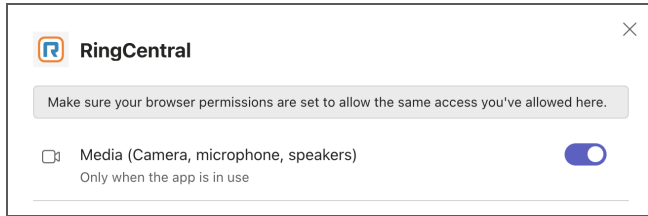
If you see the following message on your Embedded app, that means the audio permissions are not fully setup.



To enable them, click on the App permissions icon located in the top-right corner of the embedded app.



Next, enable the media permissions to be able to change your audio input and output settings

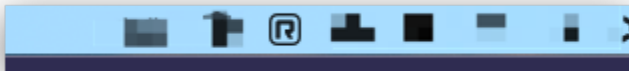


Desktop plugin features

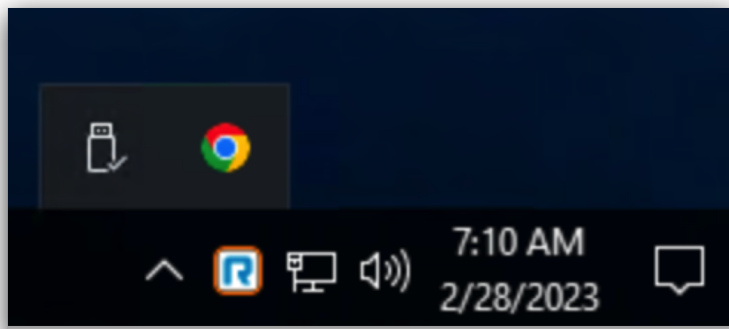
Auto launch

If the desktop plugin is installed and not blocked by the user or any 3rd party tools, the desktop plugin will auto-launch with the OS.

On Mac, it will display as an R icon on the menu bar as shown below.



On Windows, it will display as an R icon on the start menu bar as shown below.

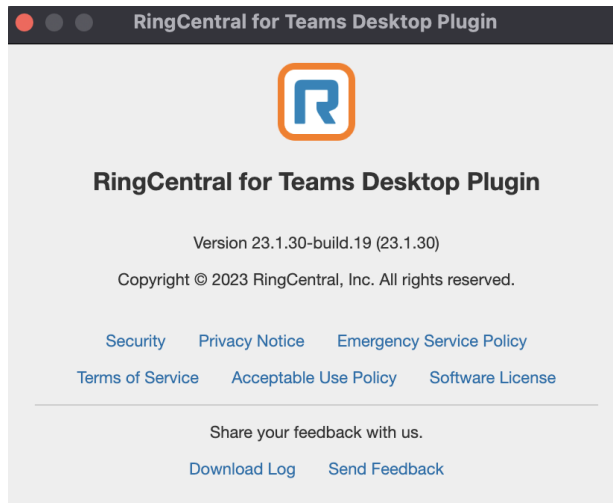


Menu

When you click on the desktop plugin icon, it will display the following menu



By selecting 'About', you can view more information about the desktop plugin



By selecting 'Quit', the desktop plugin will be prompted to quit.

Note: Once the desktop plugin is quit, the inbound call/ outbound call features for the embedded app cannot function.

Update desktop plugin

When the desktop plugin is launched (via a computer restart or the user manually quitting the desktop plugin and reopening it), a prompt will be displayed within the embedded app asking you to upgrade to the latest version.

The screenshot displays the RingCentral web interface. At the top, there is a navigation bar with 'Home', 'Activity', and 'About' links. Below this, a secondary bar contains 'Phone' (with a notification icon), 'Inbox', 'HUD', 'Contacts', and 'More'. The main content area is split into two panels. The left panel, titled 'Phone', shows a call log with columns for 'Calls', 'Recordings', and 'HUD'. The call log lists several calls, including missed calls from Albert Wen and Vijay Uppalapati. The right panel shows a dial pad interface with a 'My caller ID: (650) 727-0640' dropdown, an input field for 'Enter a name or number', and a numeric keypad with letters associated with each number. A green notification banner at the top right of the dial pad area reads: 'RingCentral for Teams Desktop Plugin is ready for an upgrade. [Restart to upgrade](#)'.

You will also notice a small indicator on the desktop plugin indicating an upgrade available as well.



Login experience

No login is required!

The desktop plugin will always be connected to the embedded app using the credentials shared during the embedded app login.

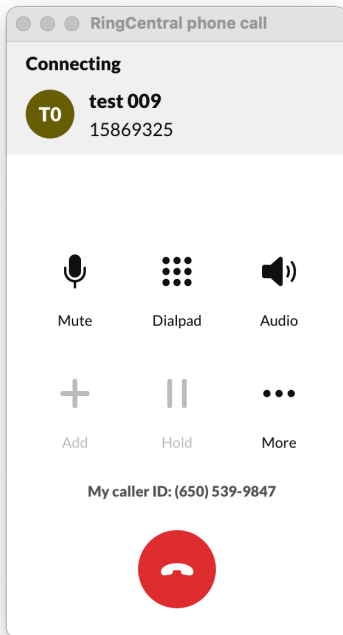
So, when you log out from the embedded app, the desktop plugin logs out as well.

Note: When you choose to quit the Microsoft Teams app without signing out of the embedded app, then the desktop plugin will remain active.

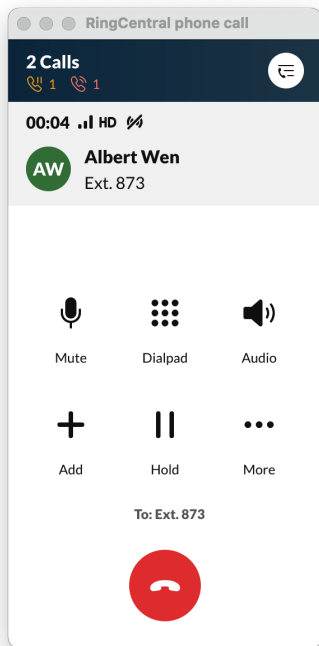
Default state

The desktop plugin does not have a default interface. It only shows up during an active call displaying the active call controls and during an inbound call.

Single call



Multiple calls



Works even if the Microsoft Teams app is closed

When the desktop plugin is running (even if the Microsoft Teams app is closed), it can receive and display inbound calls.

Desktop plugin call experience

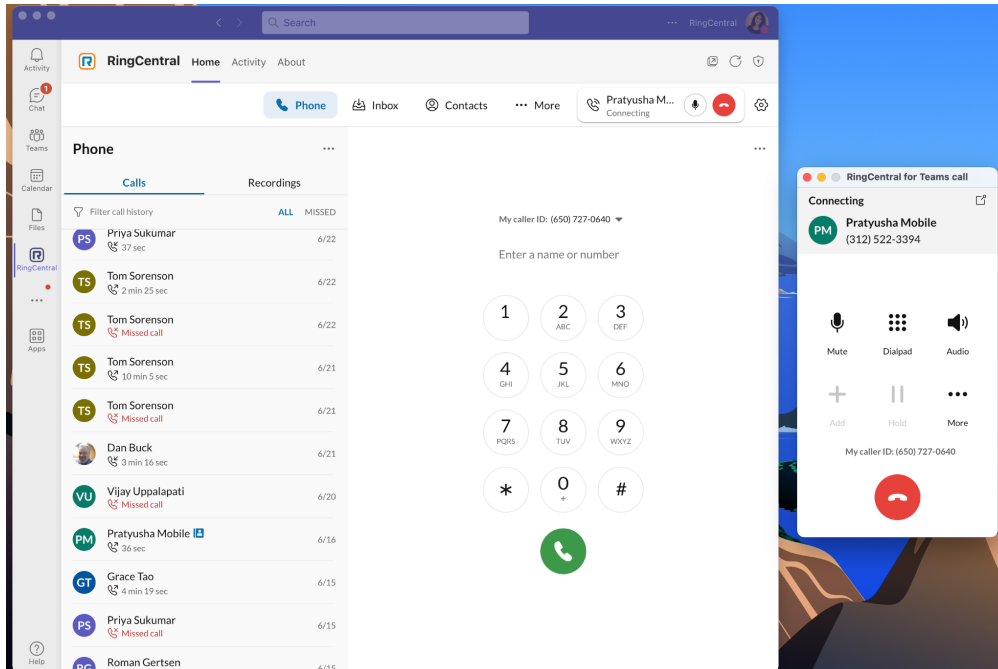
Outbound calls

When the desktop plugin is active, you can initiate a call from the embedded app and it will be routed through the desktop plugin.

There are several ways to initiate an outbound call from the embedded app, such as

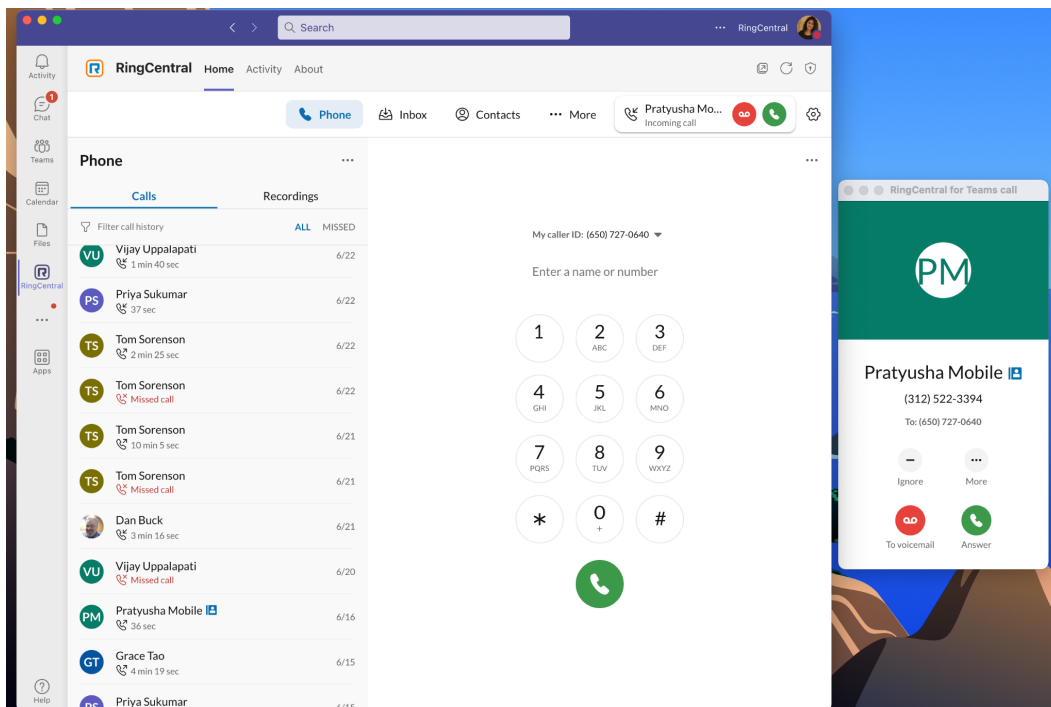
- Dialer
- Call back from Calls, Voicemail, Text, Fax, HUD, Contacts tabs
- Calls from user profile

When there's an active call, an active call indicator will display in the embedded app as shown below.



Inbound calls

As long as the desktop plugin is actively running, you can receive inbound calls. The desktop plugin will pop out to the forefront of your screen displaying the inbound call controls. Also, the embedded app will display an active call indicator.



Call handling

You can set your call handling rules by navigating to Settings -> Phone -> Call handling,

This setting will apply across all relevant RingCentral apps such as the RingCentral MVP app. For more details, click on [this link](#).

Blocked numbers

You can block numbers to make sure no inbound calls are received or outbound calls can be placed to a specific phone number.

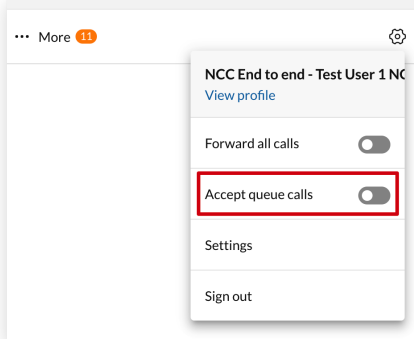
The embedded app provides the Blocked number management tool same as the latest RingCentral MVP app.

You can find it in Settings -> Phone -> Blocked numbers.

For more details, click on [this link](#).

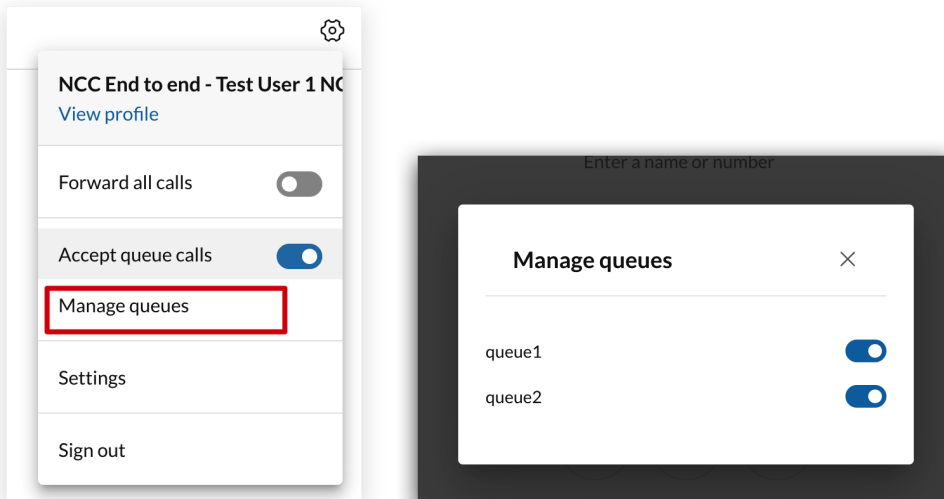
Queue experience

If you have permission to manage queue calls, you can see the 'Accept queue calls' toggle under the Settings icon within the embedded app..



With this toggle ON, you can answer inbound calls.

And if you have permission to manage multiple calls and also accept queue calls, then you will also see the 'Manage queues' feature.



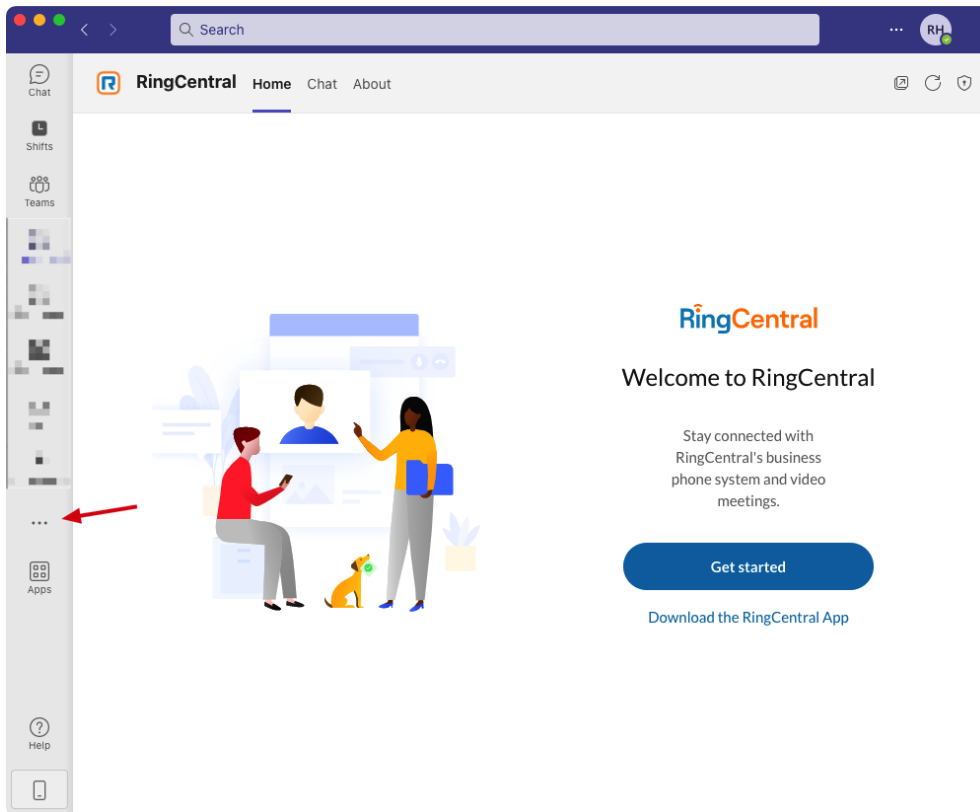
Migration from Live version (1.0) to Open beta (2.0):

If you are a brand new user of the RingCentral for Teams application, you will be receiving the latest and greatest features offered by the open beta version.

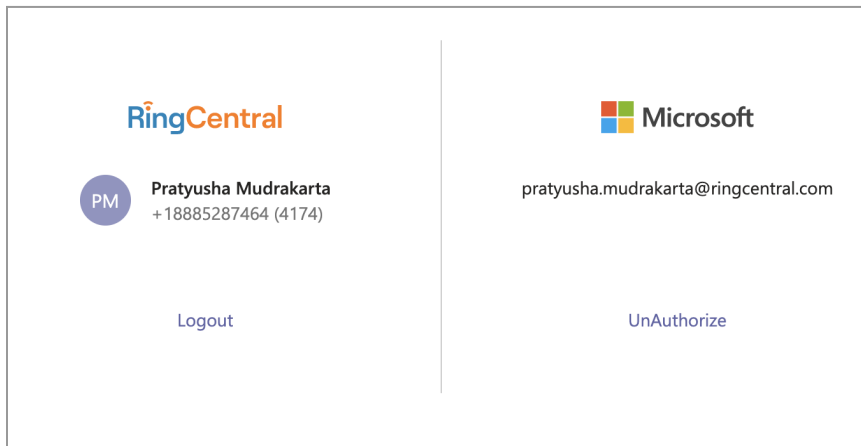
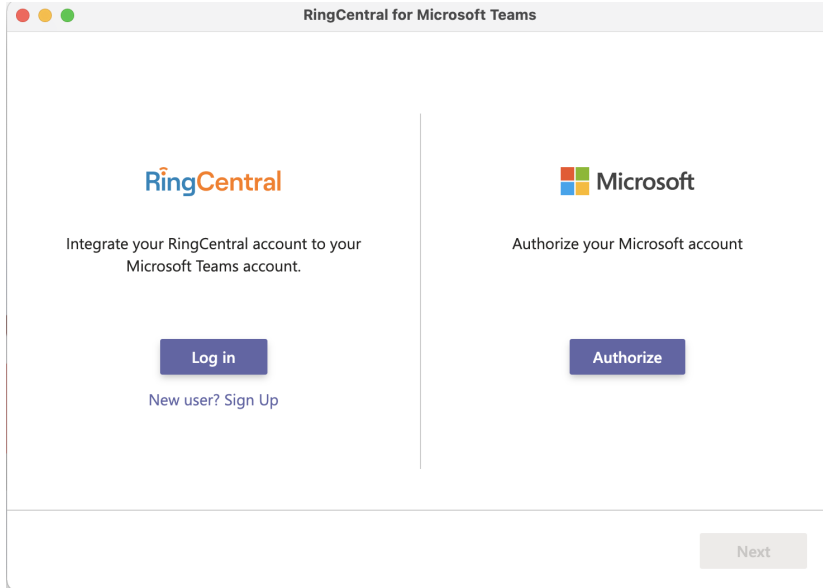
However, the users on the older version of the app will be provided a choice to migrate to the latest version depending on how the embedded app has been installed to their Teams app.

Sign in to the Live version and switch to open beta

You can sign in by clicking on the **Get Started** button as shown below



Connect your RingCentral and Microsoft credentials to proceed



Once the credentials are verified, a prompt will appear asking you to download the RingCentral app which you can skip this step.

Note: Please skip this step as you will be switching to the open beta version of the next-generation RingCentral embedded app soon which will no longer require you to download the RingCentral app.

https://teams.ringcentral.com



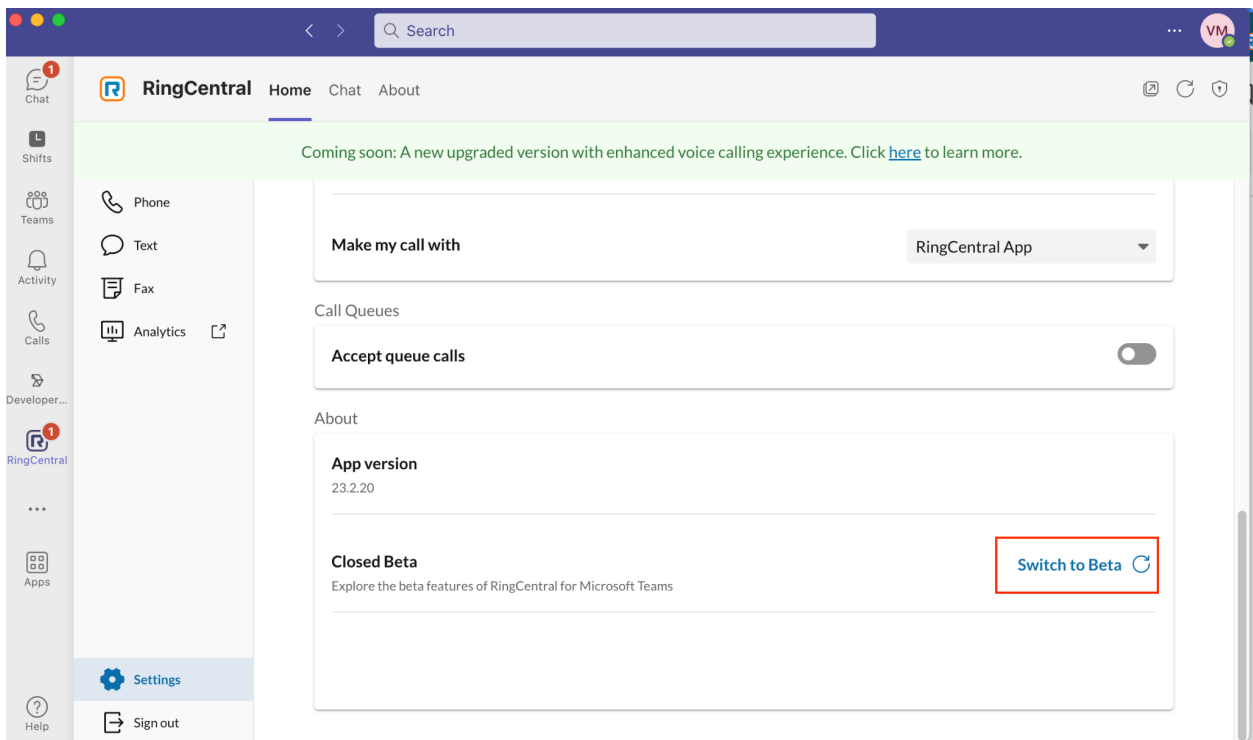
Download the RingCentral App to get started

Download

Back

Done

Next, you will find the **Switch to Beta** button in the **Settings** tab of the Embedded App.



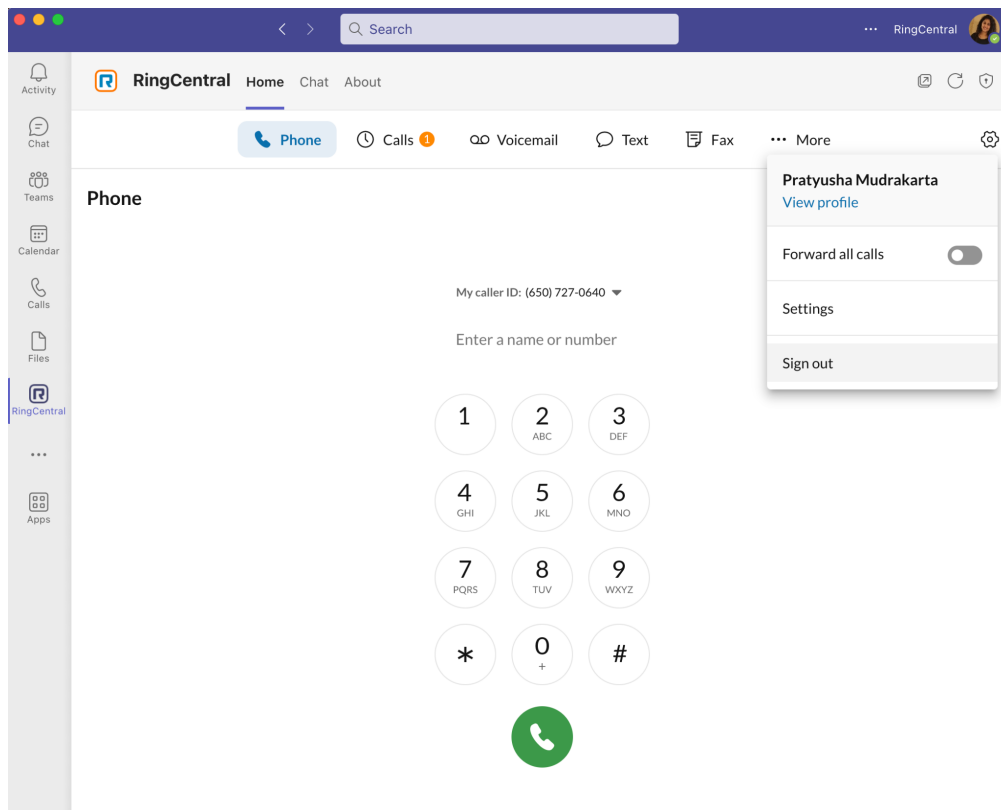
By clicking on the **Switch to beta** button, you will be redirected to the open beta version.

Important note:

In some cases, you can switch back to the Live version from the open beta version. Refer to [this article](#) for how the migration experience applies to your setup.

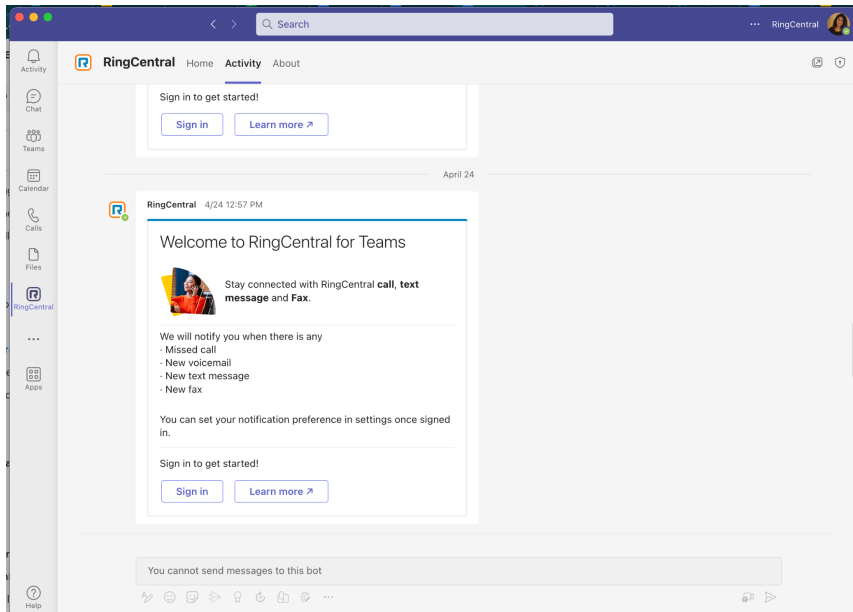
Sign out of open beta

Please note that once you sign out of the embedded app from the open beta version, you will no longer be required to authorize your Microsoft account as you will be guided through the new sign-in experience.



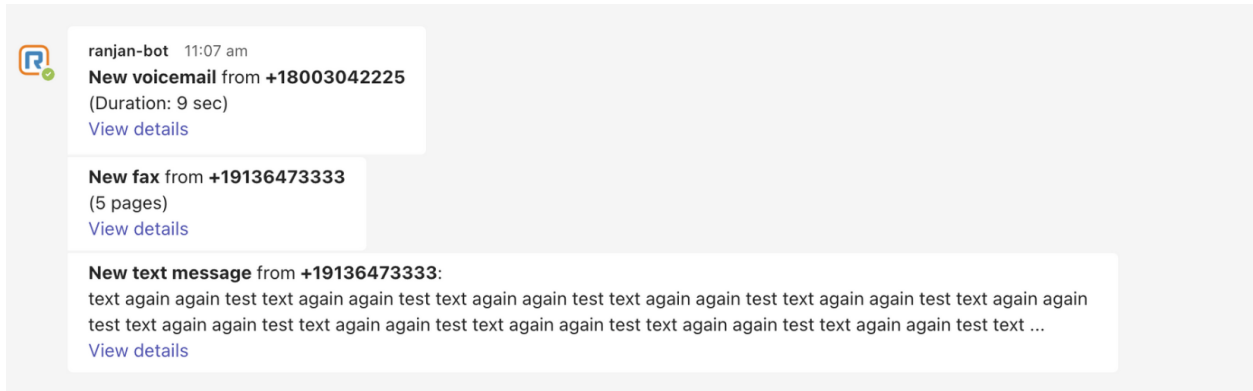
Notification service

When the Embedded App is installed, a welcome message will be pushed to the users Teams. The end-user can navigate to embedded app sign in or learn more about the integration

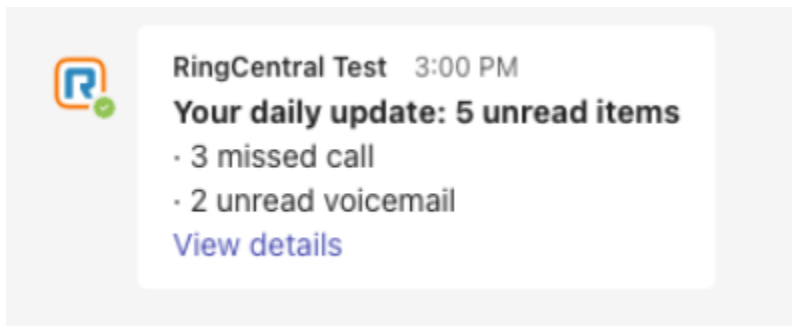


Additionally, with the notification service will be available in the Activity section, whenever you miss a call, text, or fax, then you will receive a notification in the embedded app as shown below

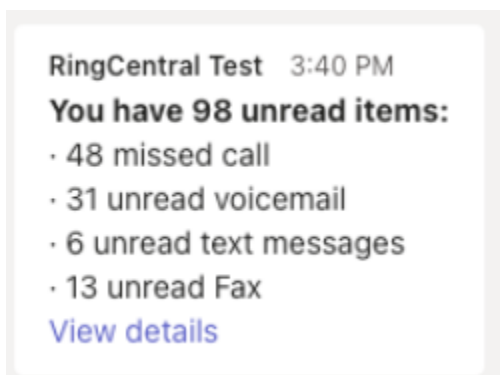
Missed call from +18003042225
(Called at 02:37 PM)
[View details](#)



A daily-unread notification will also be posted to the user at 8 AM user's local time. This is a summary of missed items past 24 hours



A summary notification is also posted whenever a user signs in so they are up-to-date with their missed items



Configure notification preferences

All notifications will be defaulted as ON for all users. You can always navigate to the Settings tab to toggle on/off a certain type of message notification based on your needs.

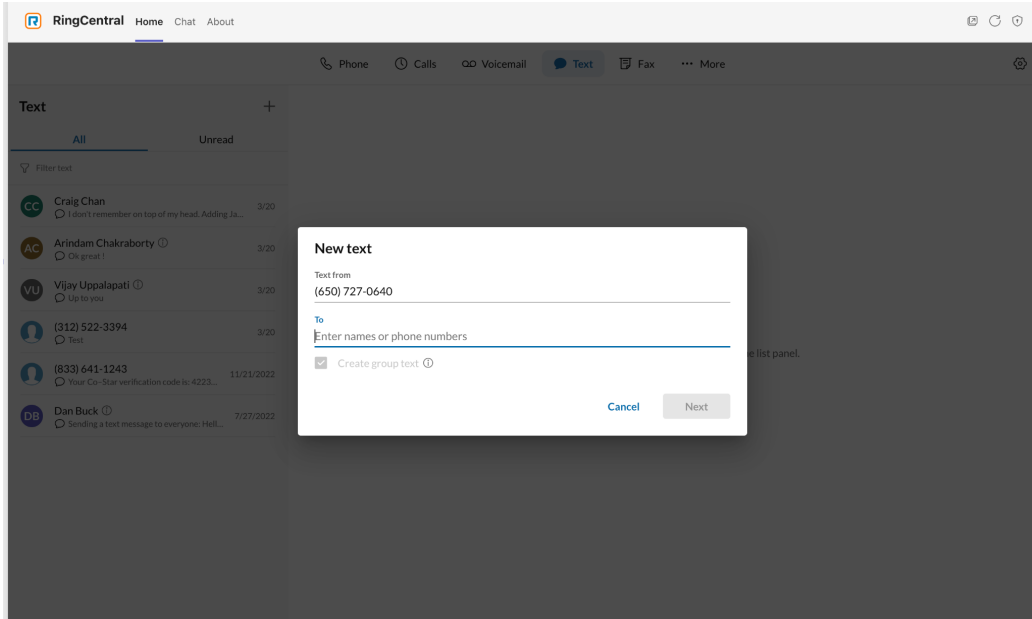
Notifications and audio

Notification settings

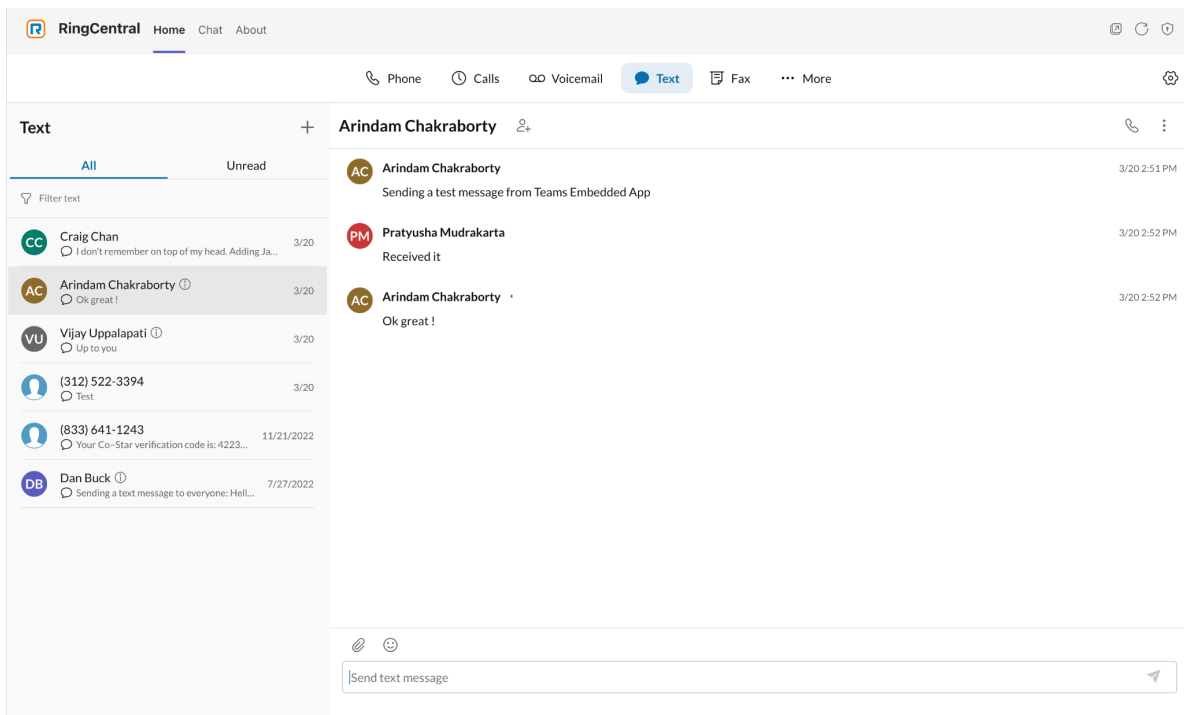
Missed call Receive notifications for missed call	<input checked="" type="checkbox"/>
New text Receive notifications for new text	<input checked="" type="checkbox"/>
New fax Receive notifications for new fax	<input checked="" type="checkbox"/>
New voicemail Receive notifications for new voicemail	<input checked="" type="checkbox"/>
Daily unread items Receive notifications for daily unread items	<input checked="" type="checkbox"/>
Unread items at sign-in Receive notifications for unread items at sign-in	<input checked="" type="checkbox"/>

Text

You can send and receive SMS text messages from within your RingCentral embedded app. You can create a new SMS by clicking on the **+** icon from the **Text** tab.

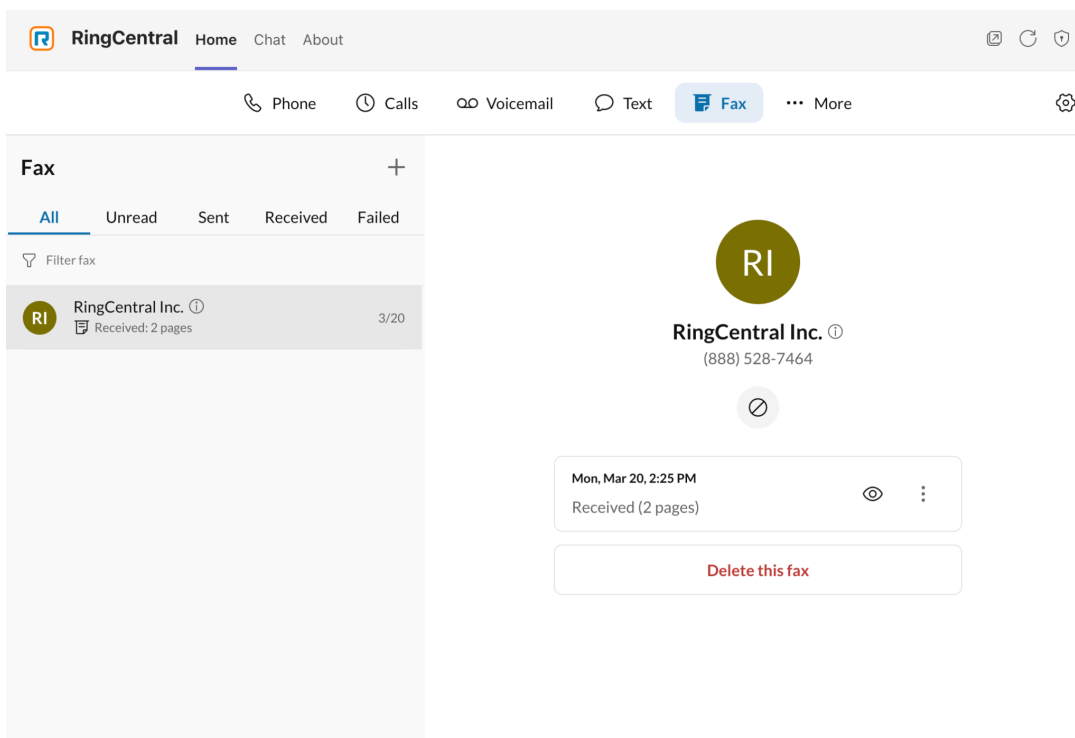
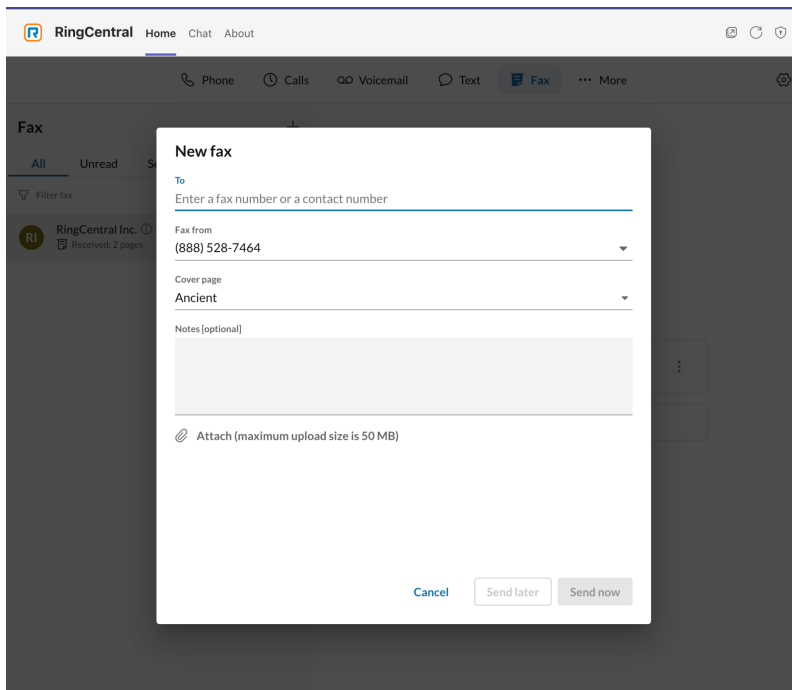


Once you send or receive an SMS text, you can click on the conversation and find the text history with that contact within your embedded app.



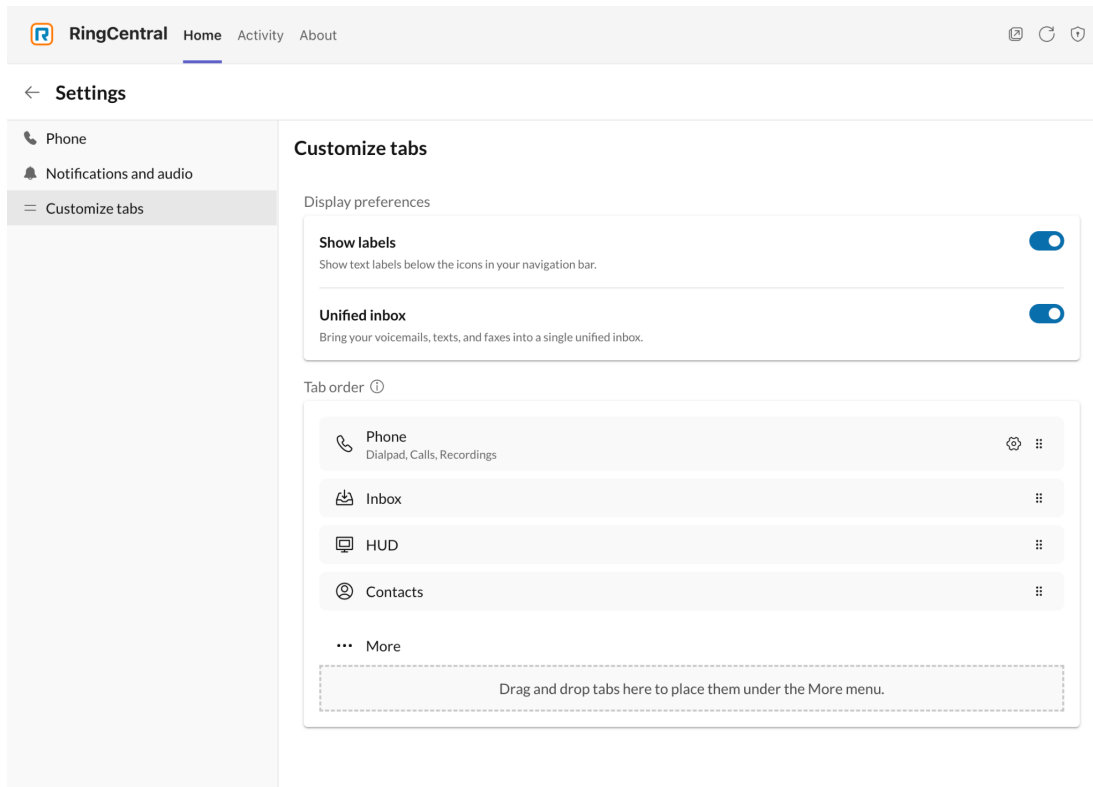
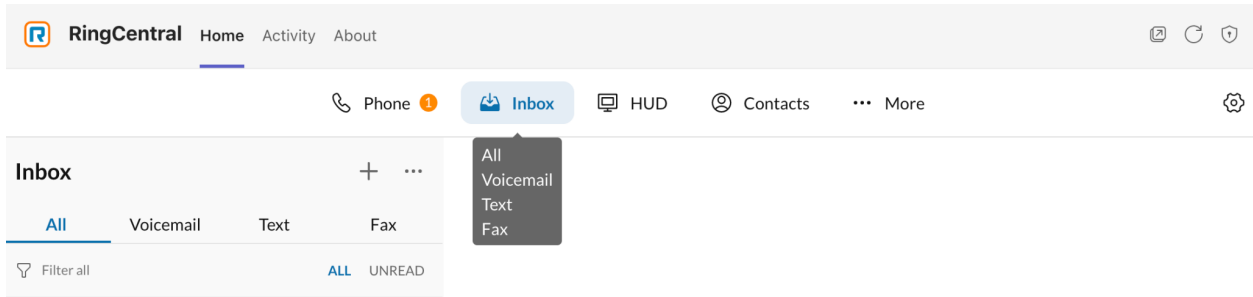
Fax

You can compose a new Fax or view your fax history from within your embedded app under the **Fax** tab.



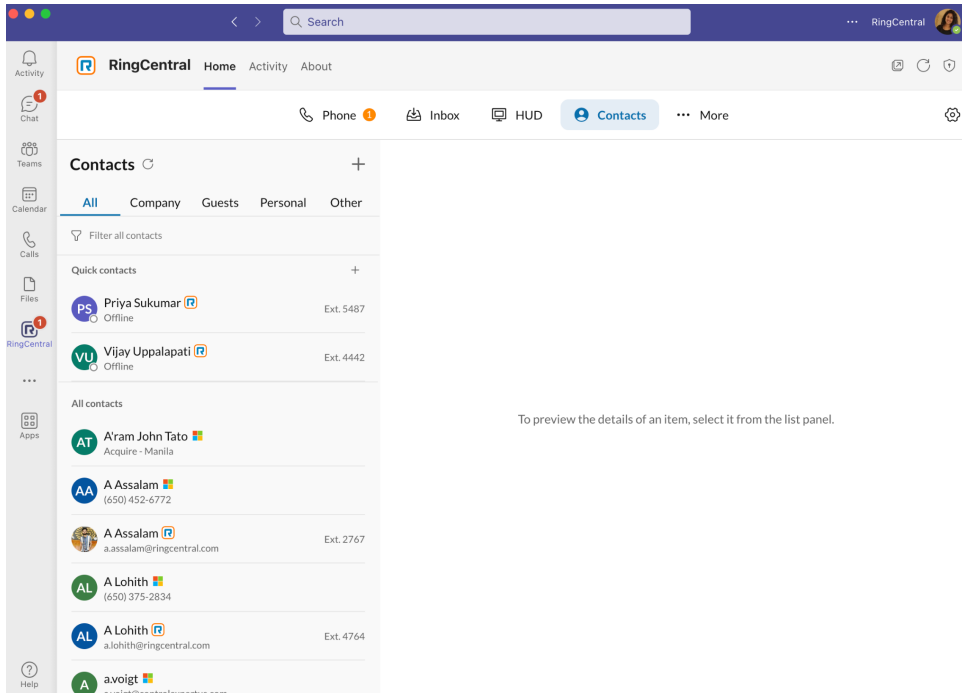
Customized menu bar

You can organize the menu bar, specifically for the Text, fax and voicemail into a single Inbox view so it is more consolidated and organized. You can always switch this user experience back to showing individual tabs for Text, Fax and Voicemail as per your desire from the settings.

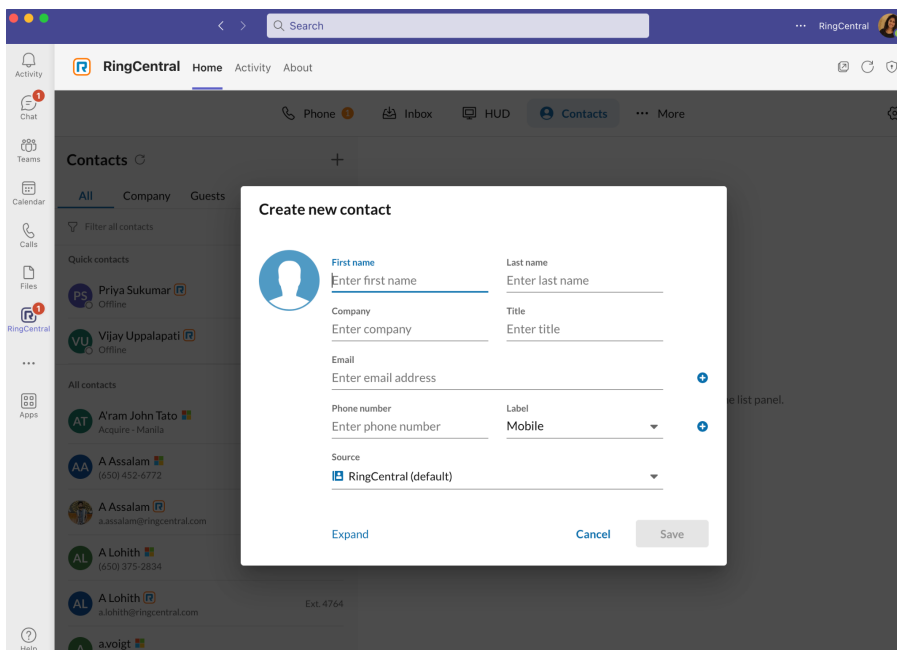


Contacts

You can view contacts from both your Microsoft and RingCentral directories as a unified contact list from within the embedded app under the **Contacts** tab.



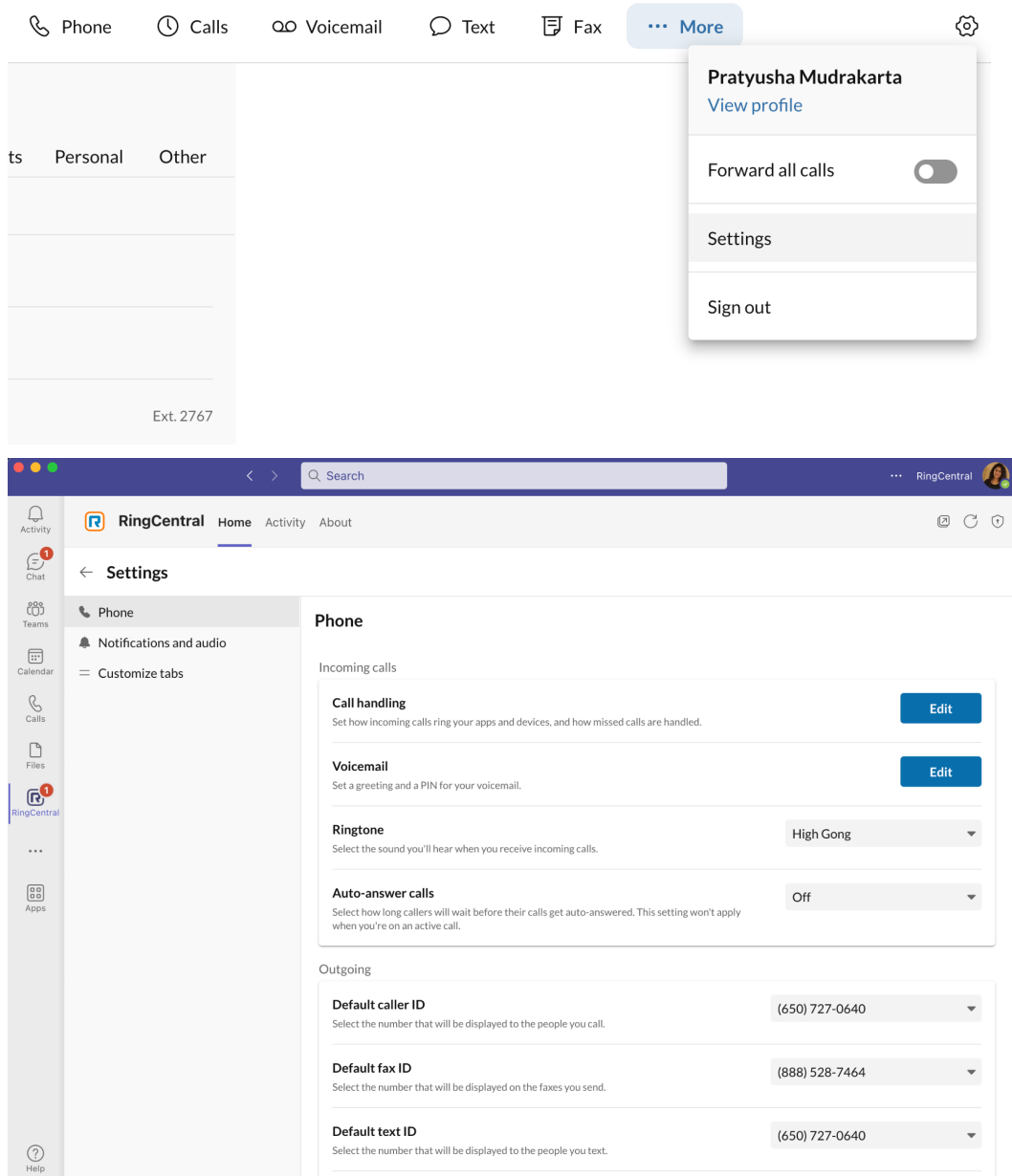
You can create a new contact by clicking the + icon displayed at the top of the contacts tab.

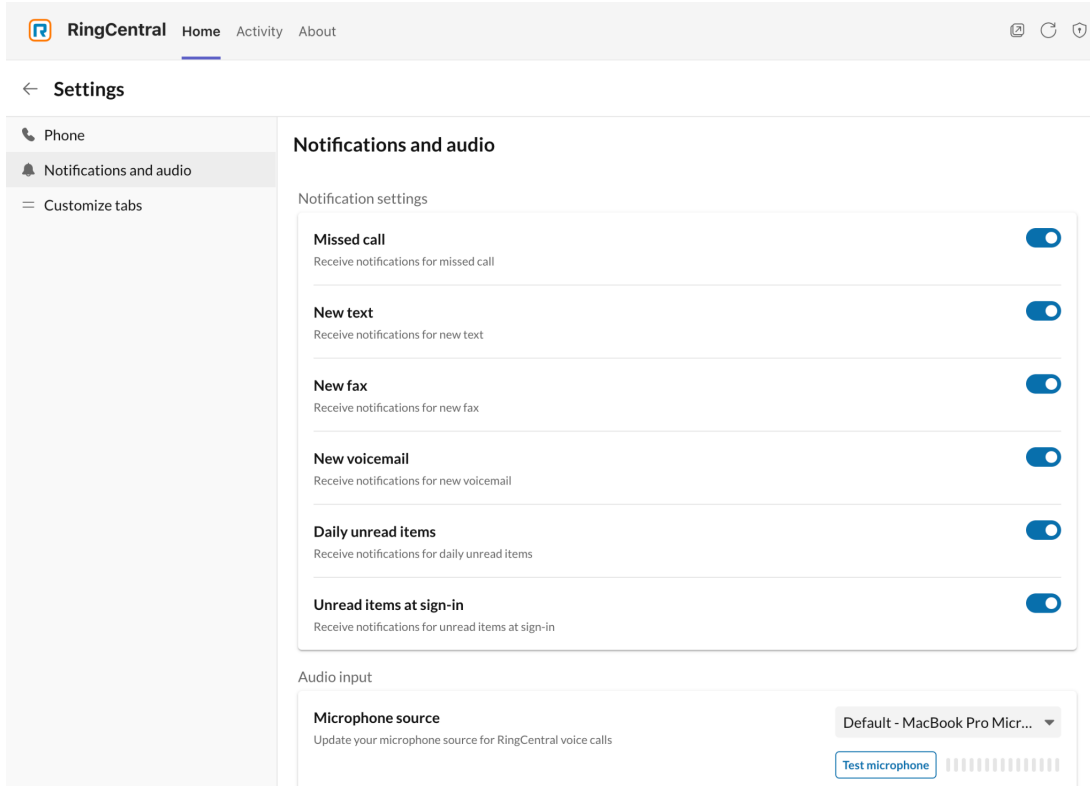


Note: The IT administrator should have granted the necessary permissions from the RingCentral Admin Portal for you to view your Microsoft directory contacts within the embedded app. Contact your administrator in case you face any errors.

Settings

The next-generation embedded app offers many phone settings such as default Caller ID, call handling, voicemail, audio preferences etc, that you can configure from within the **Settings** tab found under the **gear** icon.





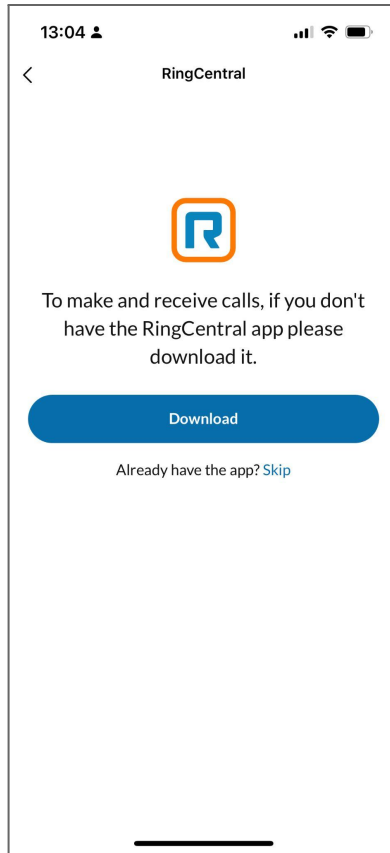
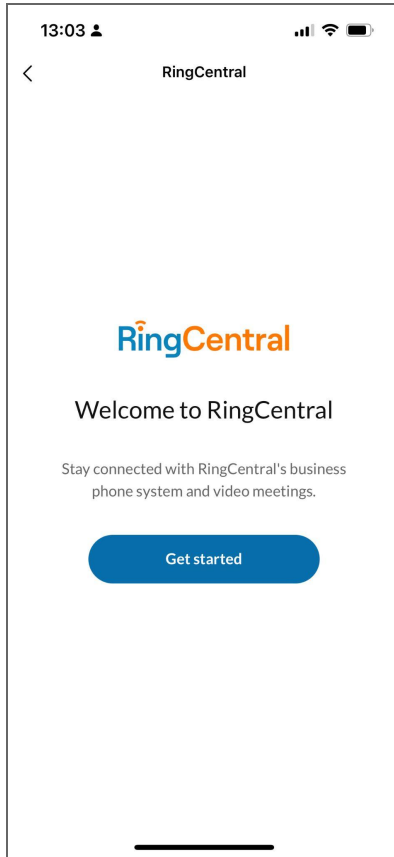
Mobile Experience

Once installed either by your administrator or yourself, the RingCentral embedded app will be available within your desktop, web, and mobile Teams app.

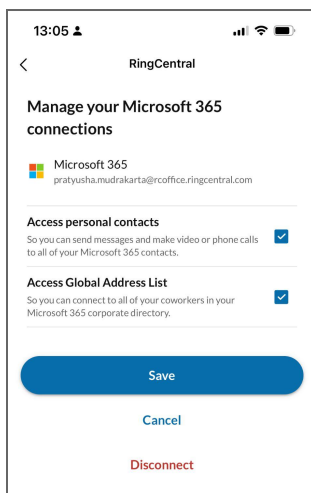
To get started, you will need to download and install the RingCentral mobile app that will complement the RingCentral embedded app within Teams for making and receiving calls as well as displaying the call controls during an ongoing call.

Quick notes:

1. Ensure that you are logged in to the same RingCentral account in both the RingCentral embedded app within Teams and the RingCentral mobile app.
2. For an outgoing call initiated from the RingCentral embedded app, it is not mandatory to be logged into the RingCentral mobile app as the embedded app will handle the login experience.

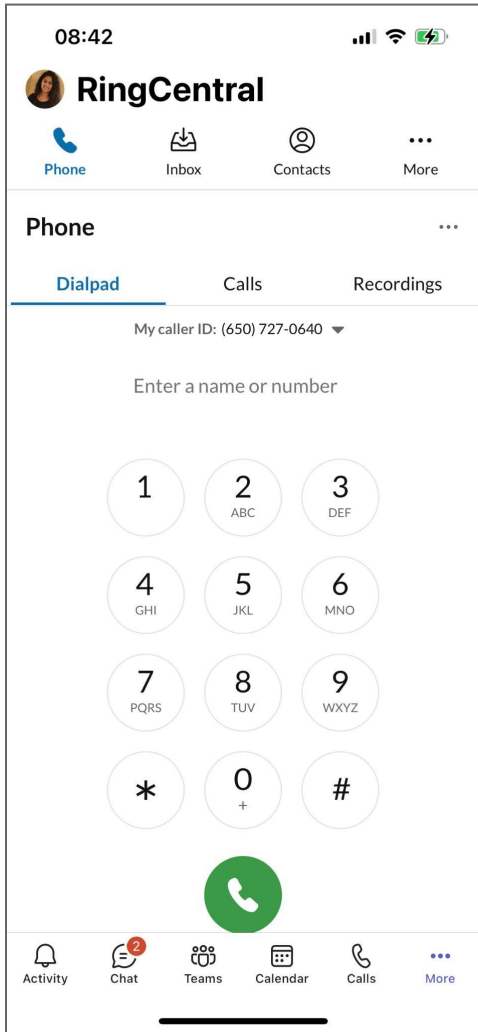


To ensure all your Microsoft contacts are displayed on the mobile interface, you will need to grant access to RingCentral. This does not require administrator permission as it is granted per-user level.

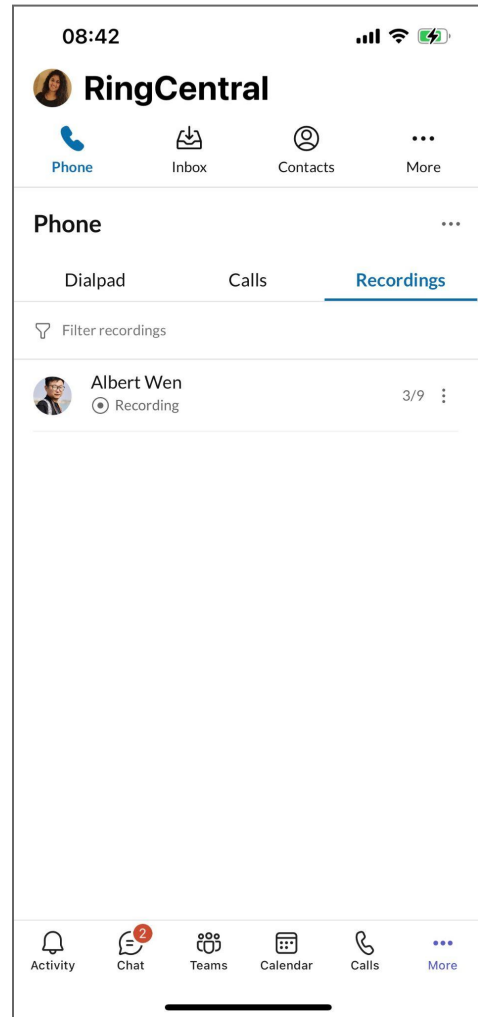


The mobile experience offers the same set of features as the desktop and web-embedded app experience. Below are some images of the features offered.

Dialer



Call Recordings list



Inbox

08:42

RingCentral

Phone Inbox Contacts More

Inbox + ...

All Voicemail Text Fax

Filter all ALL UNREAD

- Phong Vu, Gurpreet Singh** Yesterday :
Okay
- Chintamani Patwardhan, Vija...** Yesterday :
got test SMS from Pratyusha and...
- Dan Buck** 5/3 :
Test message for today!
- Priya Sukumar, Dan Buck** 5/1 :
Message received
- Sam Rizzo** 4/26 :
Received: 1 page
- Sam Rizzo** 4/26 :
Test SMS
- Pratyusha Mobile** 4/26 :
Demo 2
- Gurpreet Singh** 4/24 :
awesome

Activity Chat Teams Calendar Calls More

Text SMS conversation

08:42

RingCentral

Phone Inbox Contacts More

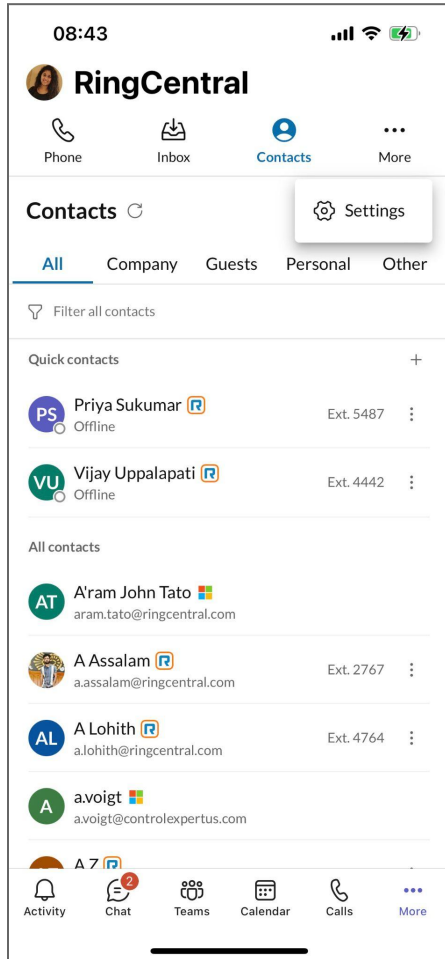
< Chintamani Patwardh... : >

- PM Pratyusha M...** • (650) 727-0640 Yesterday, 1:31 PM
Hello all, test sms
- VU Vijay Uppala...** • (650) 242-4937 Yesterday, 1:32 PM
Test
- CP Chintamani ...** • (650) 539-9846 Yesterday, 2:16 PM
got test SMS from Pratyusha and Vijay Uppalapati

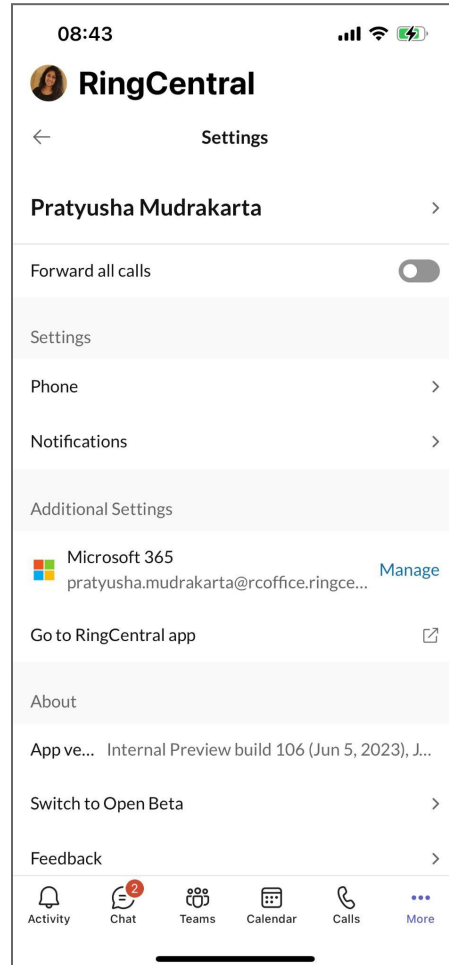
Send text message

Activity Chat Teams Calendar Calls More

Settings

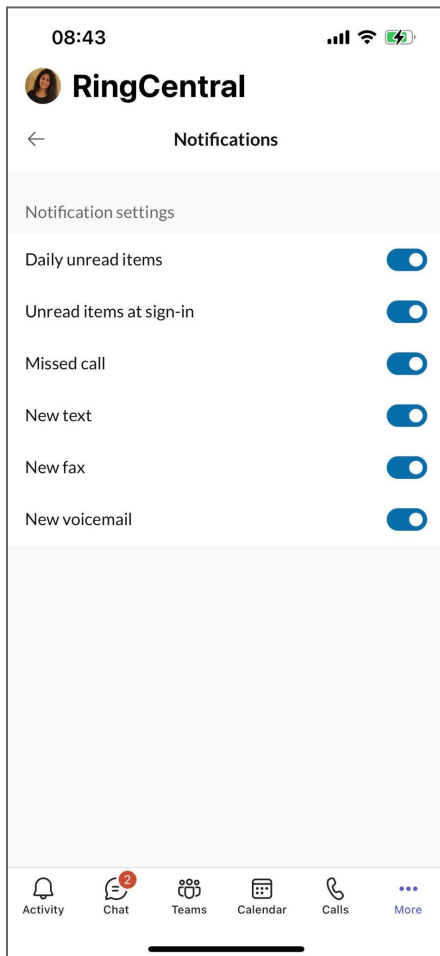


Settings view

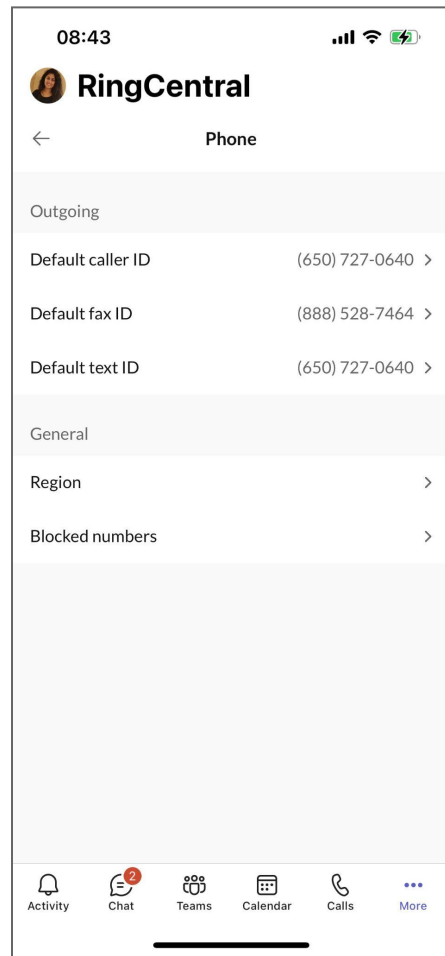


Note: To access more RingCentral phone settings, you can navigate to the RingCentral mobile app by clicking on the “Go to RingCentral app”

Notification settings



Caller ID and Region settings



Note: If you disable these notifications, you will not receive push alerts when you miss a call or a text message. However, they will be marked as unread when you open the embedded app.

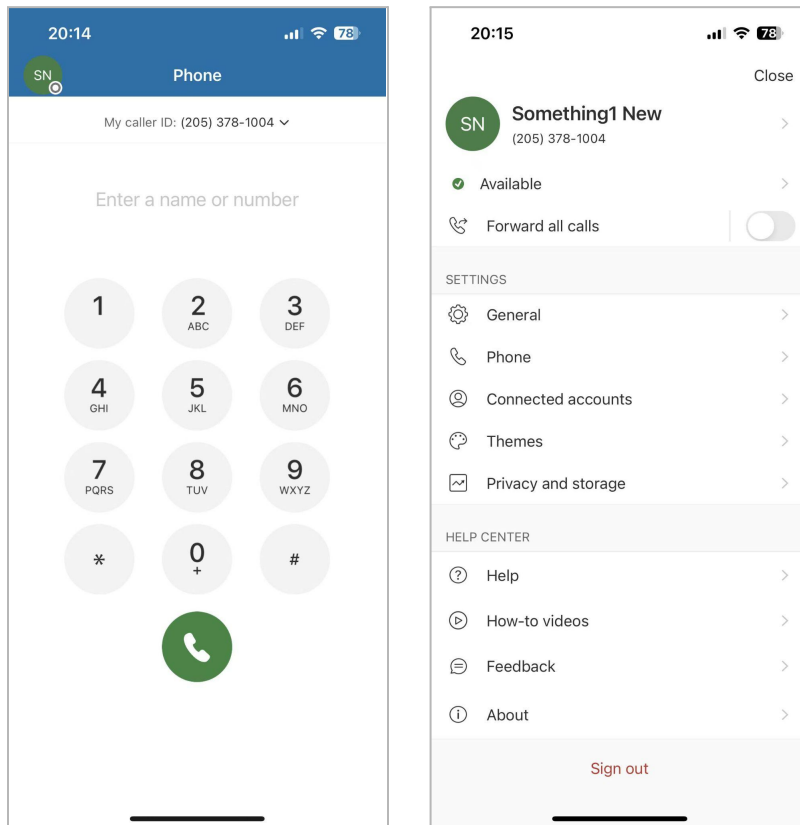
Mobile mode for RingCentral mobile app

To make and receive calls with RingCentral for Teams embedded app on mobile, users require the [RingCentral mobile app](#) to be installed and running on their mobile devices.

For a more focused call-only experience within the RingCentral mobile app, your RingCentral administrator can enable a mobile mode for your app. This mode hides all the message, video

and other RingCentral features and helps your app stay focused on any ongoing calls.

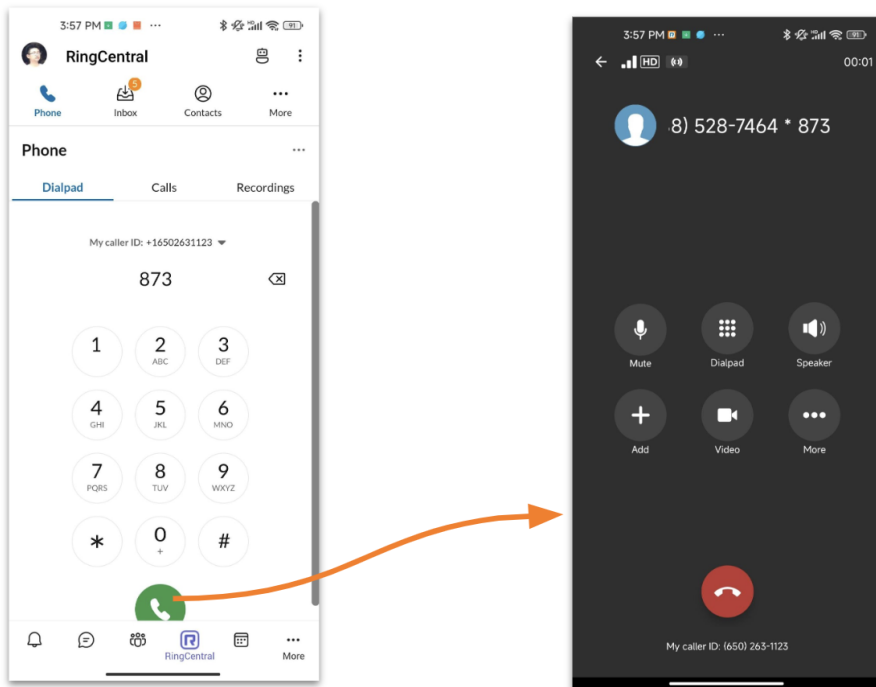
You can continue to leverage your RingCentral embedded app within Teams for other telephony features such as access call history, voicemail, SMS, etc.



Outgoing call with mobile mode experience:

You can dial a number or look up a contact and click the green button to place an outgoing call with the embedded app. Next, the embedded app cross-launches the RingCentral mobile app to place the call and display call controls.

Once your call has ended, you will be automatically navigated back to the embedded app with Teams mobile app.



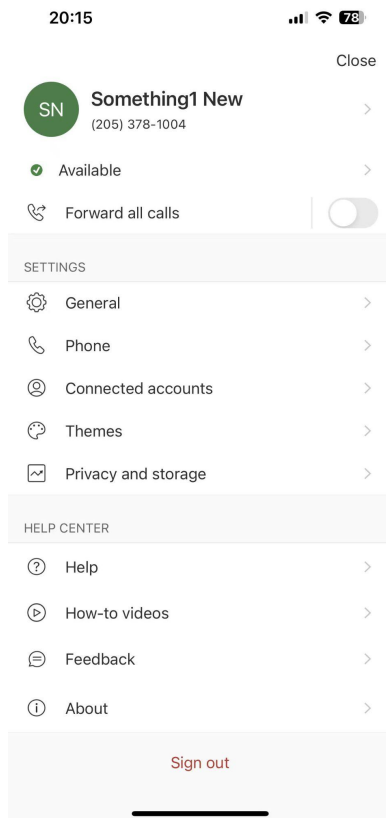
Note: You do not need to stay logged into RingCentral mobile app to make an outgoing call from the RingCentral embedded app within Teams.

Incoming call in mobile mode:

To receive incoming calls via RingCentral on your mobile device, you need to be logged into the RingCentral mobile app. This applies when the app is in mobile mode as well.

Settings in mobile mode:

You can change a few RingCentral phone settings from your RingCentral mobile app in the mobile mode as shown in the image below. In case your app is disabled from the mobile mode to the full MVP version, the changed settings will still apply.



Presence Sync in Embedded App

The RingCentral Presence Sync enables the integration of Microsoft Teams Presence into your RingCentral for Microsoft Teams embedded app, as well as the presence status of MS Teams users who are on active calls into the Teams environment.

You can now see if specific users or stakeholders in your organization are available online or engaged in another call. Presence is updated in real-time on the desktop and web application versions.

To learn more, please refer to the [Presence sync user guide](#).

Known issues and limitations

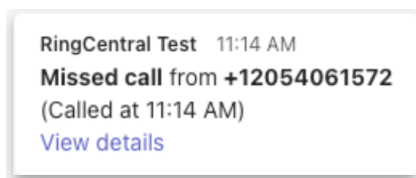
As we are continuously improving our embedded app to provide you with the best experience, we are currently investigating and working on the following known issues.

In case you encounter any of the following, please check the workarounds or report via

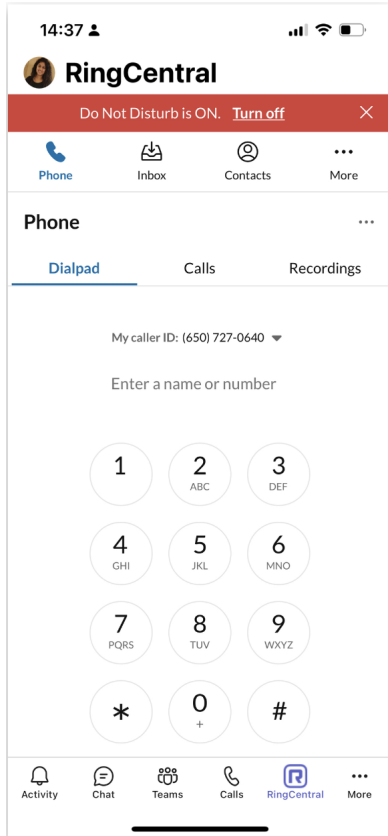
the **Feedback** feature found within the **Settings** tab with the embedded app.



1. To ensure stability, ensure only one Embedded App and one Desktop Plugin are running at a given time.
2. If you use the Teams web version, ensure the browser is updated to the latest version. Chrome and Edge Chromium are recommended.
3. Click “View details” in Activity Notifications and can only jump to the record list in the Embedded App.



4. Firefox browser is not fully supported. Use the latest Chrome or Edge browser version if running the Web Teams.
5. Download Fax, Voicemail, etc are currently not supported in the mobile version of the RingCentral embedded app.
6. OS text size setting is not supported in the mobile version of the embedded app.
7. When a user’s status is set to Do-not-disturb, a banner appears on the embedded app. You can close this banner but it will not change the presence status. You will need to change it from the RingCentral app.



10. If you leave your device idle for 30 secs, the phone icon will be grayed out. It will be enabled once you move your mouse pointer.

11. On some occasions, the RingCentral embedded app on mobile, specifically on iOS, might display the sign-in page after you have already signed in with your RingCentral account. This behavior will be fixed in future releases.

To reset, please pull down and refresh the app to sign you back in.