RingCentral

RingCentral for Microsoft Teams

User Guide For v21.3.3 and later

Table of Contents

Introduction	2
Requirements	2 3
Installation	4
Sign in and Authorization	6
Pin RingCentral app in Messaging Extension	
Make Calls via Messaging Extension	
Start Video Meetings via Messaging Extension	
Start Video Meetings and Conference Calls via Bot	
Schedule Video Meetings via Messaging Extension	
Make Calls via Embedded Dialer	
Check and search recent Calls in Call History	
Look up detailed caller/callee info in Contact Details	
Use RingCentral for MS Teams on Mobile Version	
Un-Authorize / Uninstall RingCentral App	
Limitations	

Introduction

The RingCentral app brings robust, enterprise-grade communications and collaboration capabilities to the Teams app. With this app installed, you can access and enjoy all advanced RingCentral phone, video meetings, and video conferencing features right from your Teams app.

The new visualized design of the embedded dialer enables your intuitive calling experience. The Call History and the Contact Details provide you with detailed info and comprehensive control of your calls and their caller/callee.

With a single command, the Bot posts meeting and call details in a one-on-one or group conversation. With a simple click on the Messaging extension, users can directly launch phone calls with RingCentral services.

In overall, RingCentral provides a seamless communication experience within Microsoft Teams and RingCentral services.

In order to use the app, the user needs to have an active RingCentral account.

To start using the RingCentral message extension, the app must be pinned in Microsoft Teams.

Requirements

Software

- RingCentral for Teams
- RingCentral App (highly recommended) or RingCentral Phone
- Browser
 - Google Chrome (Recommended, version 69 or later)

Permission

- To install RingCentral for Teams, the Microsoft admin's permission is required.
- To use RingCentral for Teams, RingCentral Office editions Standard and above is required.

Key Features

- Make calls or start video meetings via Message Extension
- Make calls or start video meetings via Bot
- Make calls via Embedded Dialer
- Check recent calls in Call History
- Look up caller/callee info from RingCentral and MS Teams in Contact Details

About this Guide

This guide is specifically designed for end-users of RingCentral for Teams v21.3.3 and later versions. This guide is not intended for system/network administrators and does not provide any information on how to set up the application on user desktops or how to configure the Teams instance to be able to use this application. This user guide will show you how to use this application and provide known issues/limitations of the application as well as some basic troubleshooting questions and answers.

Installation

- 1. Install RingCentral app from Microsoft Teams store.
- 2. Select a chat to start using RingCentral



- Join meetings: In-chat meeting cards and global dial-in numbers allows team members to connect in seconds.
- @ mention RingCentral in a Teams conversation to bring up bot commands including:
- Meet: Start a video meeting
- Help: Brings back the RingCentral Bot menu
- Login: Login to RingCentral
- Logout: Logout of RingCentral





Select a chat to start using RingCentral

Type the name of a chat

Search	1.	Q
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2	Klay Chen	
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Set up a bot

Sign in and Authorization

1. Initiate RingCentral message extension in personal one-on-one chat, click "**Sign in**" button. (If the admin has granted consent, the user will not be asked to sign in again.)



2. Authorize to Microsoft Teams, click "Authorize" button



Next

3. If you are unable to complete the authorization as below, check the following: (*Please skip this step if you authorize to Microsoft Teams successfully*)



Authorize your Microsoft account

Authorize

Sorry, we can't complete your request now, try again later.

- Make sure you are authorizing the same Microsoft account as the Teams login account
- Check the account has a defined email address: <u>https://admin.microsoft.com/AdminPortal/Home#/users</u>

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4. After login and authorize successfully, click "Next" button

5. Download **RingCentral App** or **RingCentral Phone**, click "**Download**" button and install. Then click the "**Done**" button to finish Sign in flow.



RingCentral App Gallery

Q. Search apps

Sign in

← Back



RC Phone

by RingCentral

RingCentral Phone frees your business phone system so you can call, fax, text, conference, and hold online meetings from anywhere.

Get support

Sign up for a free trial





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Pin RingCentral app in Messaging Extension

Microsoft Teams allow the users to interact with other web service through buttons and forms in the Microsoft Teams client. In order to use RingCentral phone/video meeting services better, you can pin RingCentral services as a icon in Teams Messaging Extension.

- 1. Go to any chat within Teams
- 2. Click "..." at the right side of messaging extension to pop-up a window to search 'RingCentral'
- 3. Add RingCentral service to messaging extension



New Cashad		
RingCentral Start video meetings and call RingCentral Start video meetings and call	within conversativ	

Make Calls via Messaging Extension

- 1. Initiate RingCentral Messaging again, directly call the contact or select phone number to call.
 - Directly clicking "**Phone**" will call contact's phone number that is defined in Teams first, if there are no phone numbers in Teams, will call the phone number defined in RingCentral.
 - If the contact has the exact same Email address and Contact Name between Microsoft Teams and RingCentral, the detailed RingCentral contact info will be shown in 'RingCentral' section.
 - If the contact only has the same Email address or same Contact Name between Microsoft Teams and RingCentral, the detailed RingCentral contact info will be shown in 'Similar contacts in RingCentral' section.



- 2. Click "Phone" icon or phone number to call out the number
- 3. Open a new website/tab to "Open RingCentral App" or "Open RingCentral Phone"
- 4. Start Call with RingCentral App or RingCentral



RingCentral App

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RingCentral Phone



Start Video Meetings via Messaging Extension

- 1. Start from a One-on-one Chat in Teams,
 - a. When clicking the "**Video**" button on the pop-up page, it will send a meeting info card to chat and open the meeting URL at the same time. The "**Join**" button is clickable to attend the meeting and the meeting ID is also provided that the user can attend the meeting in their preferred way.

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			Details 🔨
Micros	oft Teams	RingCentral	
7	Business (310) 322-3256	No matches found.	
	Mobile 5202573265		

 b. After clicking "Join", it will present a new browser window to "Open RingCentral" or you can use "click here" to start a Video meeting in the browser.

New RingCentral Video (highly recommended)

RingCentral 2:06 AM	
RingCentral Video	
Meeting ID: 266383662	
Dial-in Number: +165041915	05
Join Global Numb	bers

Open RingCentral?	
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Always allow v.ringcentral.com to open links of this type	e in the associated app
Cancel	Open RingCentral

Previous RingCentral Meetings

RingCen	tral Meetings	
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Join	Global Numbers	

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Please click Open RingCentral Meetings if you see the system dialog.

If nothing prompts from browser, click here to launch the meeting, or download & run RingCentral Meetings.

- 2. Start video meeting in Team/Group/Bot conversation.
 - a. Click RingCentral icon on the bottom navigation bar
 - b. When clicking the "**Video**" button in the pop-up window, a meeting info card is sent to Team/Group/Bot conversation.
 - c. Click "Join" in the card to start a video meeting.



Start Video Meetings and Conference Calls via Bot

- 1. Make a Video Meeting via Bot
 - a. Open a chat and type the command "**Meet**" in the conversation, a Bot message with RingCentral Video Information will be sent to the conversation. If you are in any team or channel, then you can type the command **@RingCentral Meet**.
 - b. The users can join the meeting quickly by clicking the "Join" button
 - c. If the Bot-user didn't sign in the RC account, Bot will display a message to remind the user to login



- 2. Make a conference call via Bot
 - a. Same for Conference Call, type the command "Call' in the conversation, a bot message with scheduled Conference Call will be sent to the conversation, people can join the call quickly by clicking the 'Dial in' button. If you are in any team or channel, then you can type the command @RingCentral Call.

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	Dial In Global Numbers	

Schedule Video Meetings via Messaging Extension

1. Users can schedule the Meetings in Messaging Extension

- Choose a one-on-one Chat/Group Chat
- Click RingCentral icon on the bottom navigation bar
- Click the "Schedule", it will display a modal window in meeting details that you can make changes.



• Click "Schedule" to confirm the meetings.



RingCentral Communication & Collaboration

Schedule a video meeting

Meeting title*

Steve Johnson's RingCentral meeting

Participants*

Charlie Chen X

Time zone

(UTC+08:00) Beiji	ing, Chongqing, Hong Kor	ng, Urumqi			\sim
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Back	Schedule
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Clear all

2. Users can get a meeting is scheduled message from the RingCentral chat



3. Users can review the meeting through the Calendar and can edit the meeting information by clicking the meeting in the Calendar. Any modification can be saved by clicking **"Send Update"**, or users can **"Cancel meeting"** as well on the same page

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Make Calls via Embedded Dialer

In MS Teams, when clicking RingCentral icon at left navigation bar, it will display a three-column design screen. From the left to the right are **Embedded Dialer**, **Call History**, and **Call Details**.

The embedded dialer is for making a call. After typing phone number and press green call button, the call will be automatically redirected to RingCentral App or RingCentral Phone. More call control functions can be found on RingCentral App or RingCentral Phone.

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In Embedded Dialer, it supports contact name search function. You can type the phone number or partial of contact name which is matched in either Teams contacts or RingCentral contacts. All the matched records will be shown in a list as below



Check and search recent Calls in Call History

All the calls that you recently make can be found in center of screen, called Call History. Each row represents one phone record with contact name, phone number, inbound/outbound call, status, and length of time. At the right-hand side, there are two hidden buttons of call back and delete. They can be shown when mouse cursor hover that area.



If you have a lot of recent calls, you can use the filter function at the top of Call History. It will filter the matched call records in the list, which will help you quickly to identify the call you are looking for.



Look up detailed caller/callee info in Contact Details

At the right-hand side of the screen, there is an area for Contact Details. It combines both contacts in MS Teams and RingCentral. It gives the user complete information about the caller or callee.



Use RingCentral for MS Teams on Mobile Version

1. Find the RC apps in Navigation

- The RingCentral app which was installed in desktop version can be synced with MS Teams mobile version automatically
- Click "More" button at the navigation to show all installed apps
- Find the "**RingCentral**" apps to open the apps at Bot chat You can click "**Reorder**" to edit the navigation by moving the icons



2. Open the RC app at Bot chat

- There are 2 ways to open the RingCentral app at Bot chat
- 1. Find the "RingCentral" app in "More" to open it directly at the Bot chat
- 2. Click the "Chat" in navigation and find a named "RingCentral Bot" contact to open the Bot chat



3. Start a Call or Video at Bot chat

User should login/sign up the RingCentral account before starting the call or video
To tag RingCentral simply type "Meet/Call/Help"

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4. Find the RC apps at 1:1 chat

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- Click "**Chat**" at the navigation Select any contact to start a 1:1 personal chat Click the "+" icon to find the RingCentral app Click "**RingCentral**" to "**Invite**" apps into the chat for the initial use -

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5. Find the RC apps at Teams chat

- Click "**Teams**" at the navigation
- Select any Group to start a group or channel chat
- Click "New Post"
- Click the "+" icon to find the RingCentral app
- Click "RingCentral" to "Invite" apps into the chat for the initial use



6. Start a Call at 1:1 chat

- Click "RingCentral" icon -
- After logged in, user can Open the Contact Page to click "**Phone**" to start a call by using RingCentral App or RingCentral Phone If user didn't install RC phone before, there is a notification to let user download -
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RingCentral		RingCentral			
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7. Start a Video at 1:1 chat

- Click the "RingCentral" icon
- After logged in, open the Contact Page to click "Video" to start a Video by using RingCentral mobile version
- User can click "Join" to join the meeting thru the message card in conversation as well
- If user didn't install RingCentral mobile version before (unified app), the meeting will be held in the browser



8. Start a Video at Teams chat

- Click the "RingCentral" icon
- After logged in, open the Team info Page to click "Video" to start a Video by using the RingCentral app
- Click "Join" to join the meeting through the message card in conversations as well
- If the user didn't install RingCentral mobile version before, the meeting will be held in a browser



9. Schedule a meeting at 1:1 or Teams chat

- Click the "RingCentral" icon
- After logged in, open the Contact or Team info Page to click the "Schedule" button
- Edit meeting settings if desired then schedule the meeting
- Once scheduled successfully, the meeting will appear on all parties calendars

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Un-Authorize / Uninstall RingCentral App

1. Right click RingCentral message extension icon, and click "Settings"



2. Click "Un-Authorize" and it will be unauthorized successfully.

RingCentral *	Microsoft
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Logout	UnAuthorize
	Done

3. Click 'Uninstall' to remove RingCentral app from the chat.

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Limitations

- 1. In order to use the app, the user needs to have an Active RingCentral account.
- Start using the RingCentral message extension, the app must be pinned in Microsoft Teams, and it works in personal one-on-one chats only.
- 3. Teams preview won't open in Safari. <u>https://support.office.com/en-us/article/safari-browser-support-</u> <u>1aac0a7c-35a8-42c1-a7df-f674af e234df?ui=en-US&rs=en-US&ad=US</u>