RingCentral for Microsoft Office 365

Installation & User Guide

Office 365

RingCentral®

Contents

RingCentral®

Introduction

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About RingCentral® for Microsoft Office 365™

RingCentral for Microsoft Office 365™ seamlessly integrates business communications into your cloud work environment, transforming Microsoft Office 365 into an enterprise-grade communications hub with a powerful and easy-to-use interface that is very simple for end-users to deploy and IT to manage.

RingCentral for Office 365 integration is available for Mail, Calendar, Contacts (People) and Tasks.

It offers these features:

- Use Google Chrome browser on any platform (Windows®, Mac®, and Chromebook®).
- Connect a Microsoft Office 365 user account and a RingCentral Office subscription.
- Click-to-dial any phone number that appears in the Microsoft Office 365 Mail application.
- Send and receive business SMS from the Microsoft Office 365 interface.
- View your complete communications history—calls, texts, faxes, and voicemails from your Microsoft Office 365 Mail application.
- Combine RingCentral and Microsoft Office 365 Contacts in one easy-to-search screen.
- Schedule RingCentral Meetings® or audio conferences from within Microsoft Office 365 Calendar application.

About this Guide

This guide is designed for users of RingCentral for Microsoft Office 365. It shows how to add the application to your browser and how to use the application. This guide also provides some basic troubleshooting tips.

Basics

For optimal user experience, ensure that:

- Your Google Chrome browser is updated to the latest version.
- You have set the correct number as your RingCentral Direct Number — you will be making and receiving calls from this number through the Office 365 interface. You can find RingCentral Direct Number in the RingCentral Portal at **My Settings > Phones and Numbers > Direct Numbers**.
- You are logged in to your Microsoft Office 365 account.

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Installation

Installation

Step 1: Launch **Google Chrome** and then navigate to the Chrome Web Store.

 Note: Make sure you have the latest version of Google Chrome: Go to **Settings > About Google Chrome**

Step 2: Click **Extensions** and Enter **RingCentral** in the search box. (Figure 1)

Step 3: Locate **RingCentral for Office 365** and click **+ ADD TO CHROME.** (Figure 2)

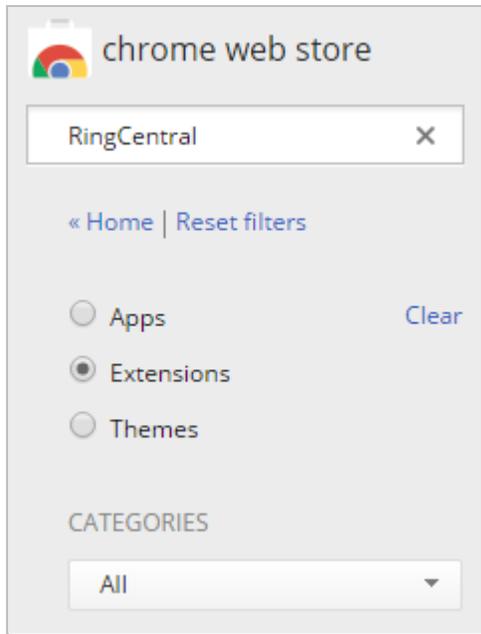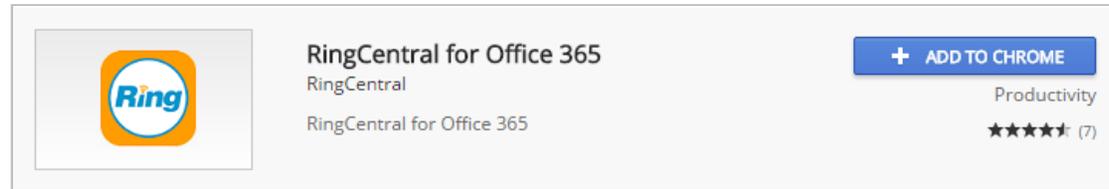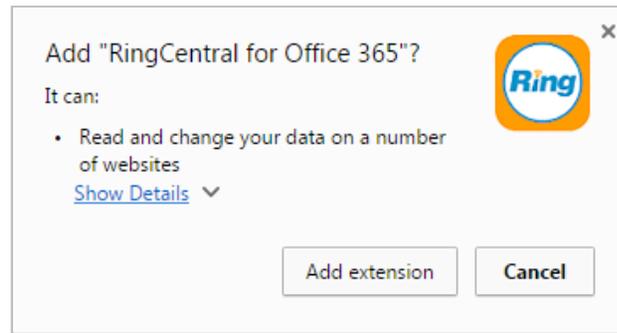**Step 4:** Click **Add extension** to confirm the installation. (Figures 3 and 4)

Figure 2

Figure 4

Figure 1
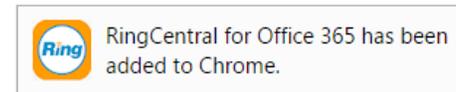
Figure 3

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Verify Installation and Login

Step 1: After the app is installed, log in to your Microsoft Office 365 account on your Chrome browser. (Figure 5)
Currently the integration works only on Google Chrome.

Step 2: Enter your RingCentral Office credentials and click **Login**. (Figure 6)

Note: You should see RingCentral for Microsoft Office 365 Dialer on the right side of Mail, Calendar, People, and Tasks. (Figure 7)
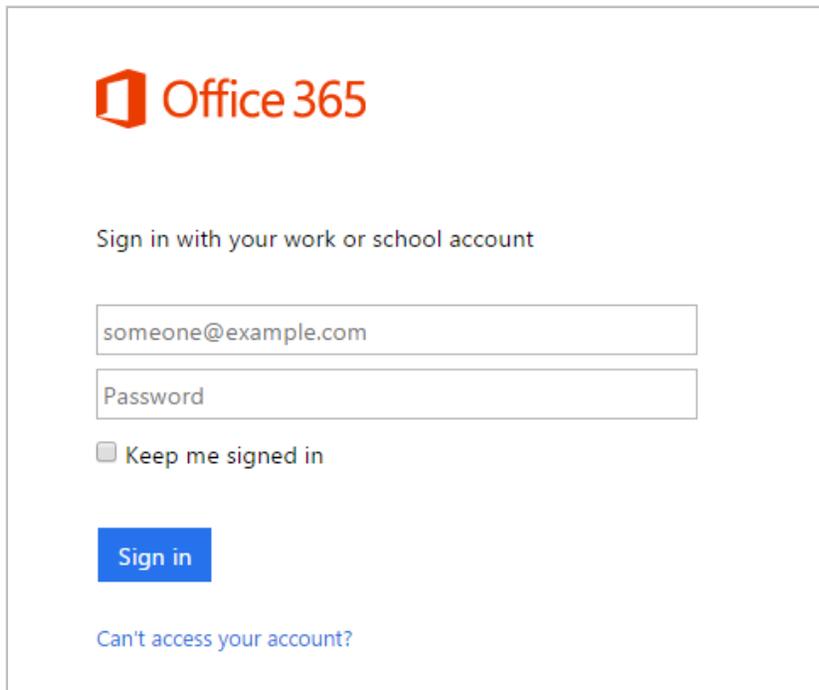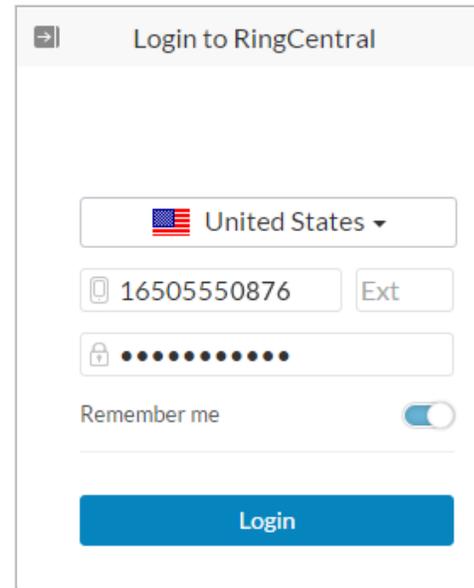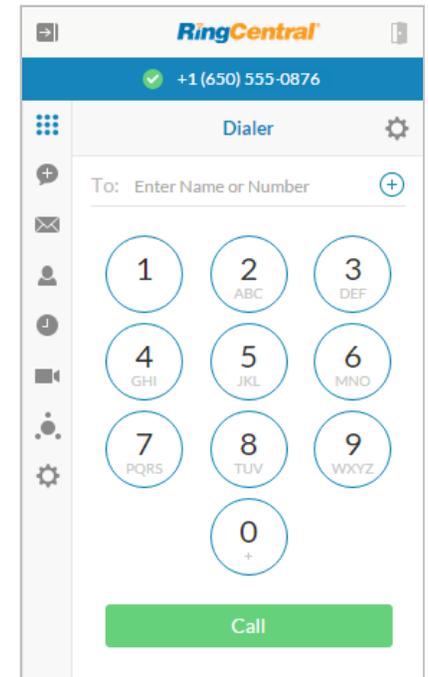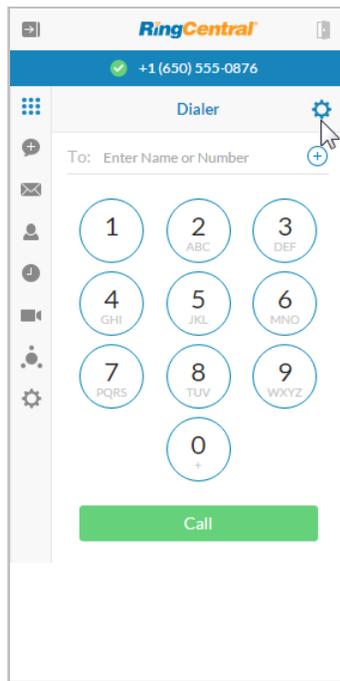
Figure 5

Figure 6

Figure 7

Placing a Call with Microsoft Office 365

Step 1: Log into your Office 365 and RingCentral accounts. (Figures 5 and 6 above)
Note: You can select **Keep me signed in** and **Rembmber me** to stay logged in for one week.

Step 2: Click the **Dialer Settings** icon ⚙. (Figure 8)

Step 3: Click the Dialer Outbound number drop-down to select a RingOut number. (Figure 9)

Step 4: Click the plus icon ⊕ to open **Contacts**; then click the Contact you wish to call. (Figures 10 and 11)

Step 5: Click the Call button [Call] on the contact details panel to start your call to Extension 107. (Figure 12)
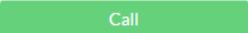
Note: Outbound calling is available only via RingOut to an RingCentral Office provisioned device (Softphone or deskphone) available on your account. Custom numbers cannot be used. In this example, the RingCentral Desktop App was used. You may also use a RingCentral provisioned deskphone.
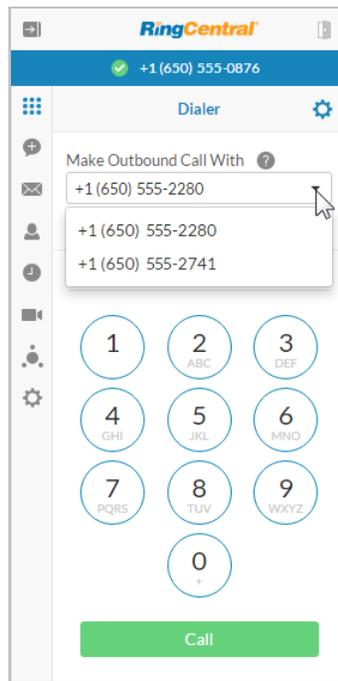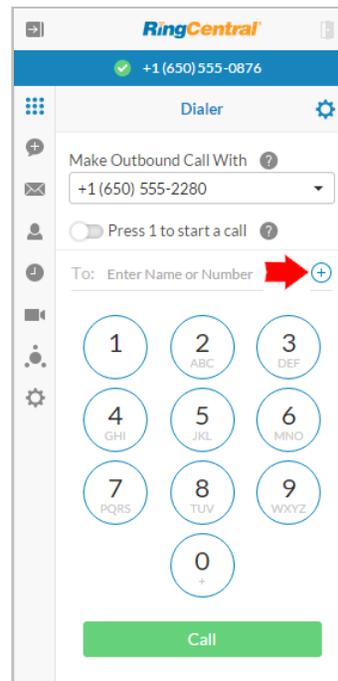
| Figure 8 | Figure 9 | Figure 10 | Figure 11 | Figure 12 |

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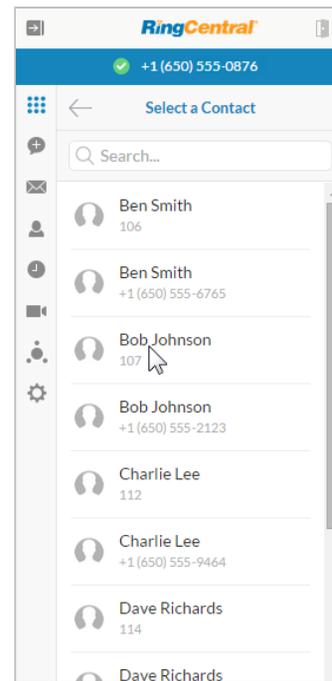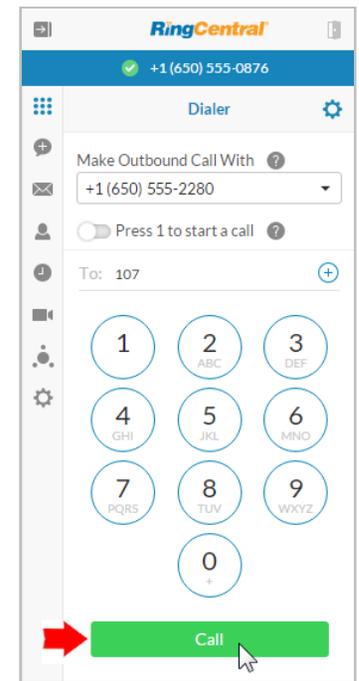
Using Click-to-Dial to Place an Outbound Call

The call to Extension 107 shown above used the click-to-dial feature to connect to the extension inside the RingCentral phone system. Once you are logged in, all phone numbers in your Outlook Contacts become clickable links.

Your outgoing call to Extension 107 will be confirmed, as shown in Figure 13. Confirmation of your connection is shown in Figure 14. Confirmation that your call has finished is shown in Figure 15.

Note: You can also select your party's outside number from your Contacts list (Figure 16) and call it using the dial pad (Figure 17).
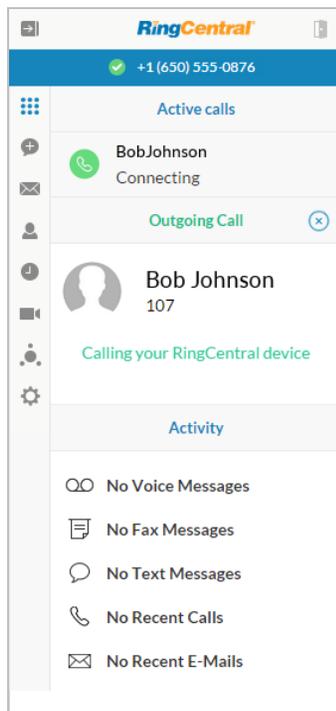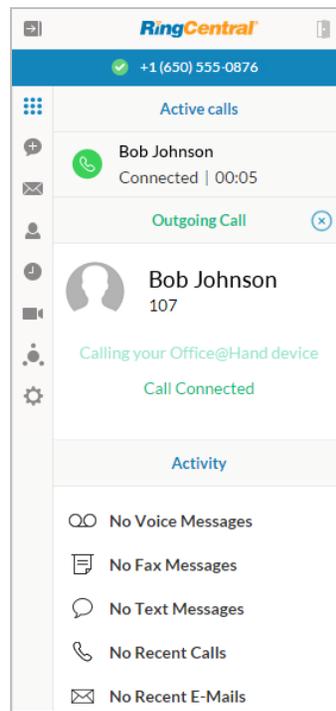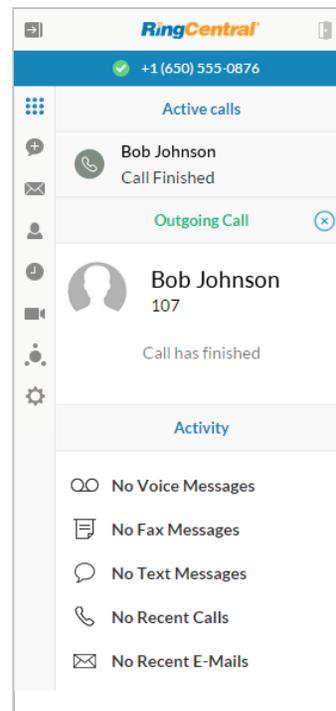
| Figure 13 | Figure 14 | Figure 15 | Figure 16 | Figure 17 |
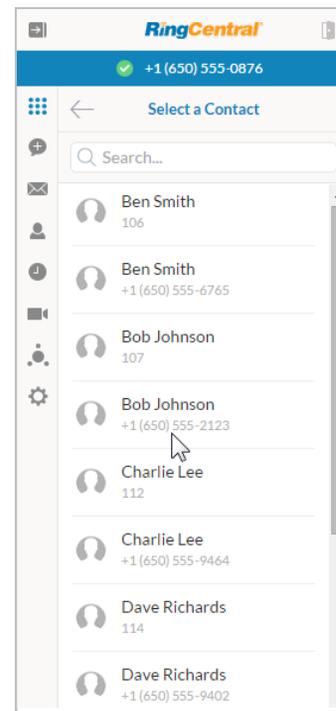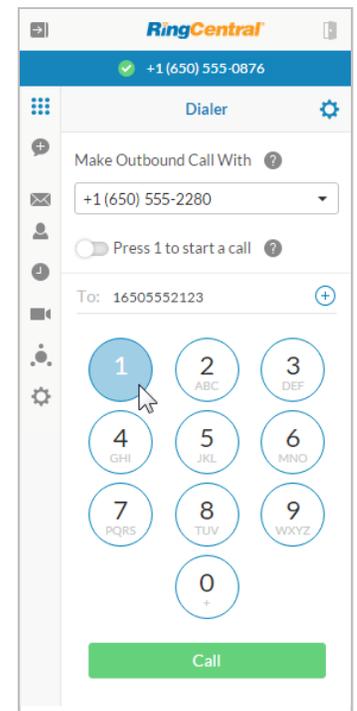
Sending a Text Message with RingCentral for Office 365

Step 1: Log into your Office 365 and RingCentral accounts. (See page 7)

Step 2: Click the **Business SMS** icon ⊕. (Figure 18)

Step 3: Click the plus icon ⊕ to open **Contacts**; then click the Contact you wish to message. (Figure 19)

Step 4: Type you text message and click **Send**. (Figure 20)

Step 5: Checking her **Messages**, Helen can read Mary's request and respond to her. (Figure 21)

Step 5: Checking *her* **Messages**, Mary can read Helen's response to her request for a meeting. (Figure 22)
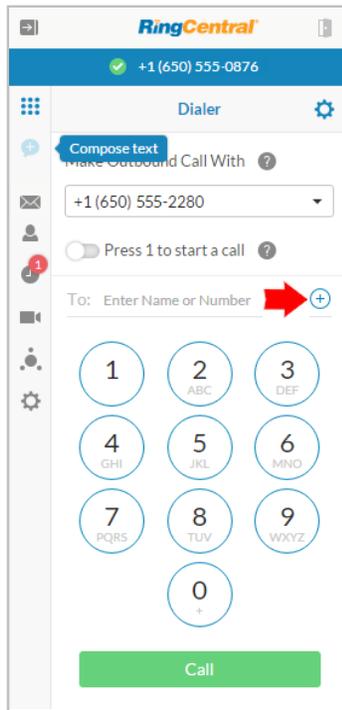
Figure 18
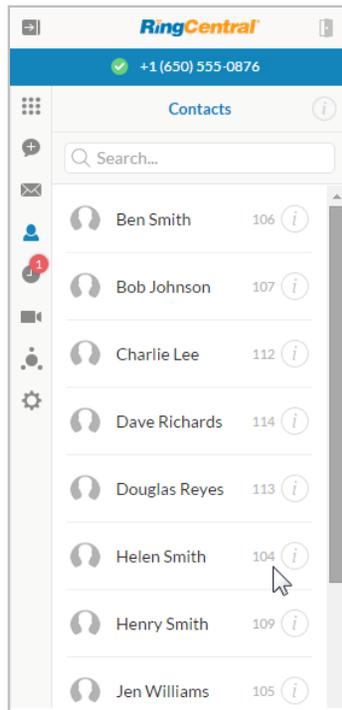
Figure 19
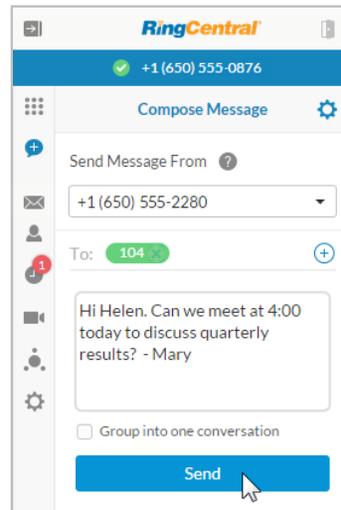
Figure 20
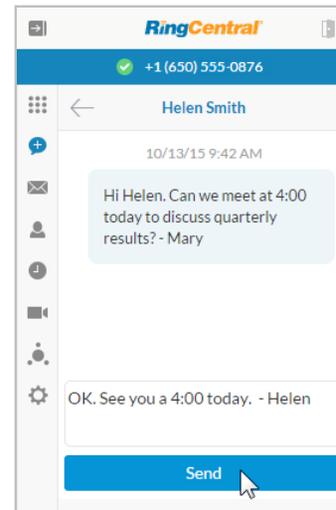
Figure 21
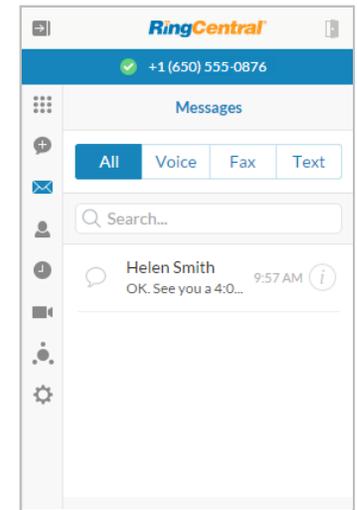
Figure 22

Browsing your Contacts List

Step 1: Log into your Office 365 and RingCentral accounts. (See page 7)

Step 2: Click the **Contacts** icon 👤 . (Figure 23)

Step 3: Select a contact and click the **Info** icon ⓘ to see contact details. (Figures 24 and 25)
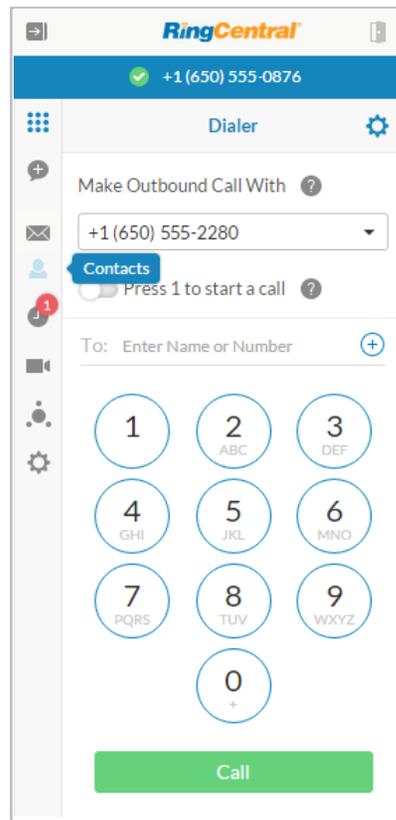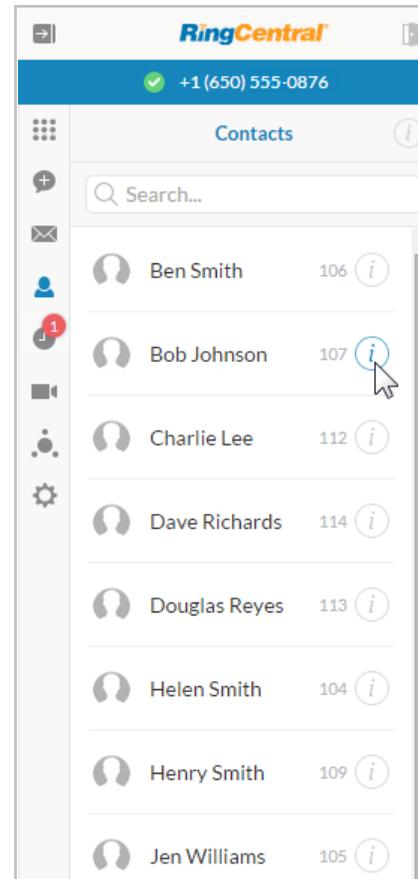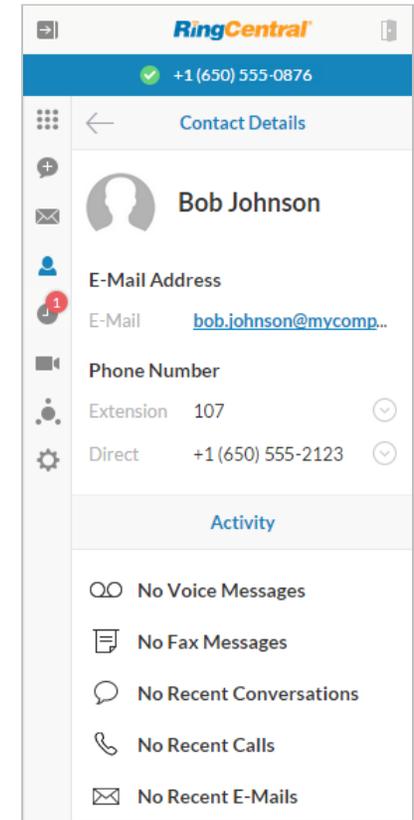
Figure 23

Figure 24

Figure 25

Checking the Call Log

Step 1: Log into your Office 365 and RingCentral accounts. (See page 7)

Step 2: Click the **Call Log** icon 🕐. The Call Log list opens in the **All** setting. (Figure 26)

Step 3: Click the **Info** icon next to a call on the list to see details for that call. (Figure 27)

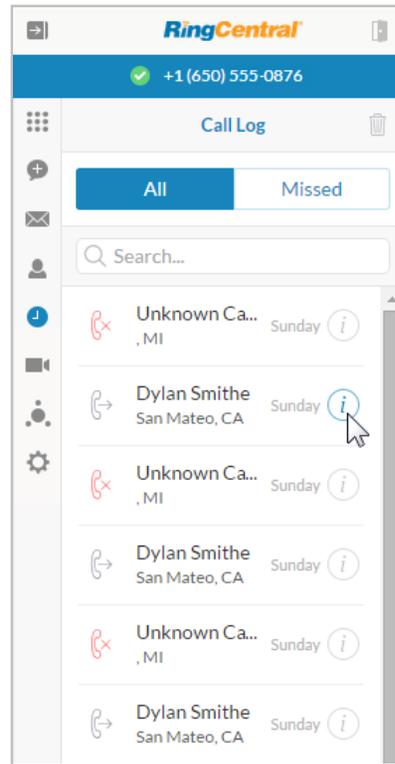**Step 4:** Click **Missed** to see only missed calls. (Figure 28)
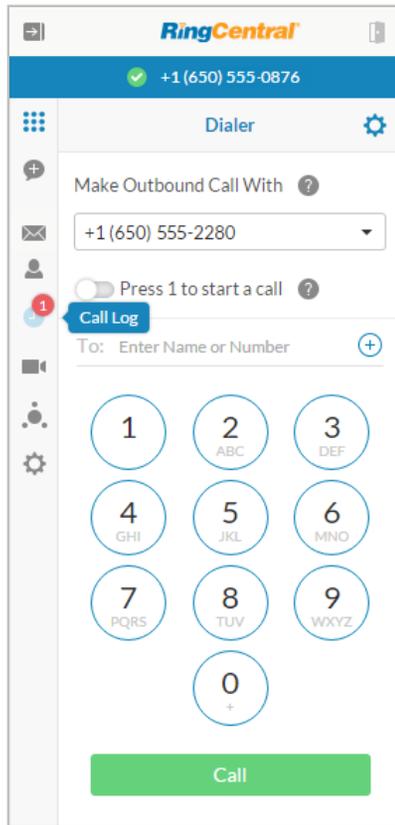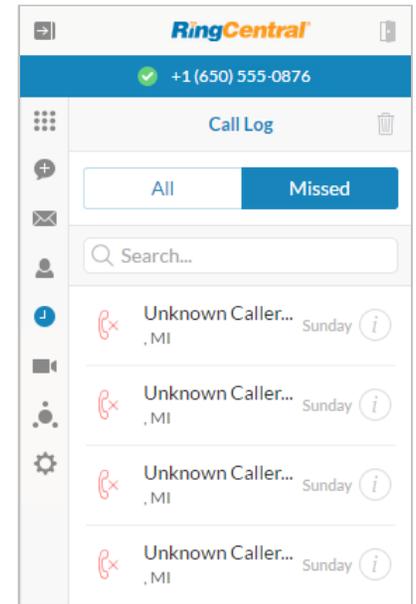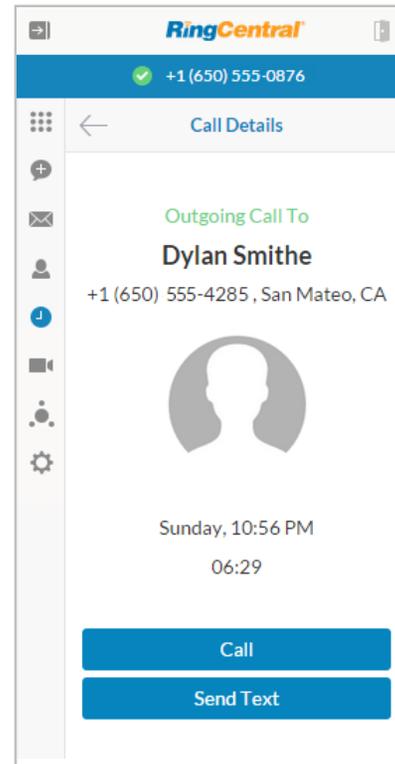

Figure 26

Figure 27

Figure 28

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Setting up a Meeting with Office 365

Step 1: Log into your Office 365 and RingCentral accounts. (See page 7)

Step 2: Click the **Schedule Meeting** icon ▇◢ (Figure 29). The **New Meeting** page opens. (Figure30)

Step 3: Enter the meeting topic, date & time, duration, meeting type, and password; Enable join before host, and click **Save in Calendar**. (Figure 30)

Step 4: View the meeting details on your Office 365 calendar (Figure 31) and add an email reminder for yourself (Figure 32).
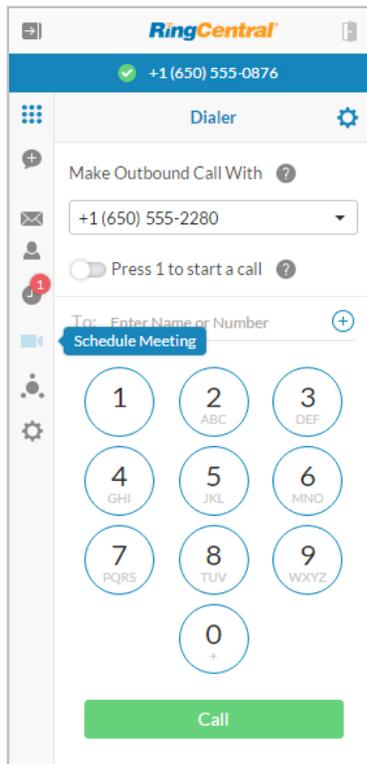
Figure 29
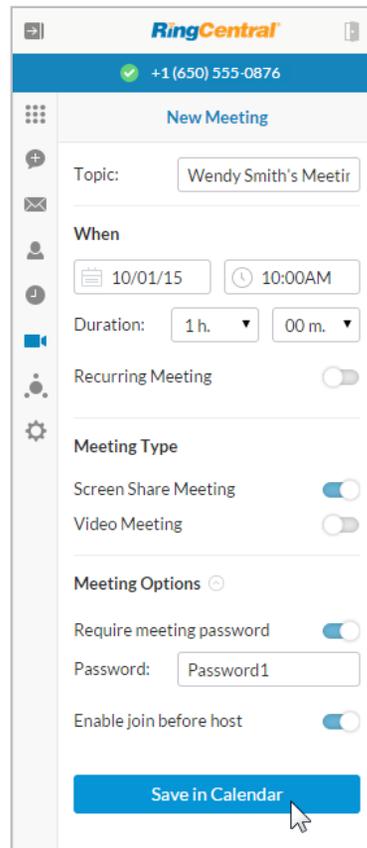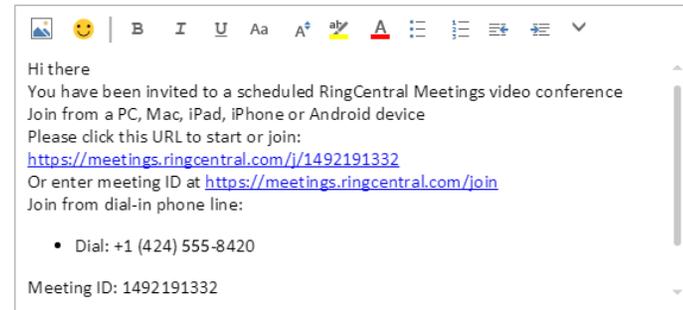

Figure 30
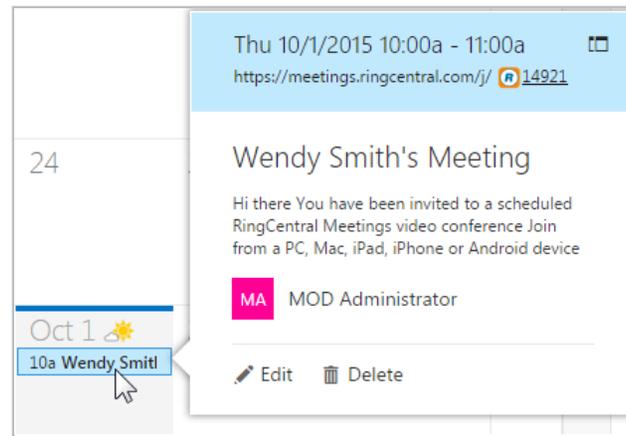
Figure 31

Add an email reminder

Figure 32

Setting up a Conference with Office 365

Step 1: Log into your Office 365 and RingCentral accounts. (See page 7)

Step 2: Click the **Conference** icon 📍 . (Figure 33)

Step 3: Select International participants (if any) and click **Save in Calendar**. (Figure 34)

Step 4: Click "New Conference" on your Office 365 calendar to see details and add an email reminder for yourself (Figures 35 and 36).
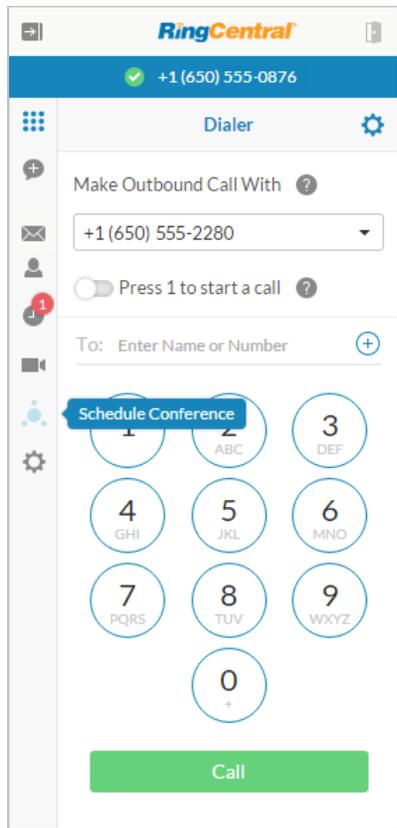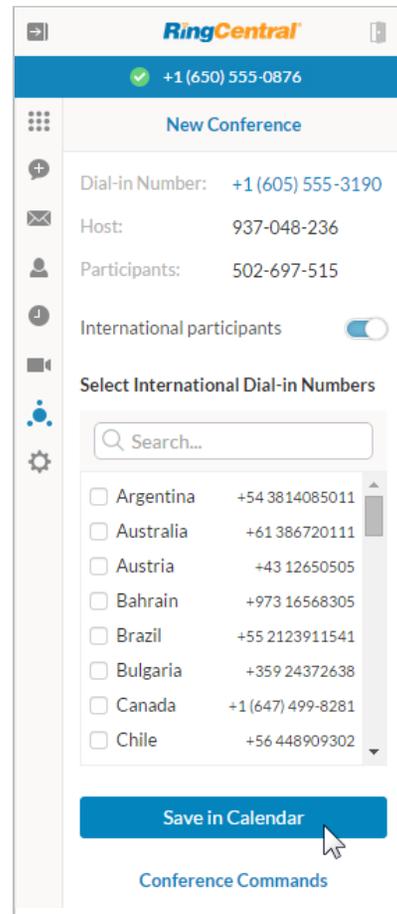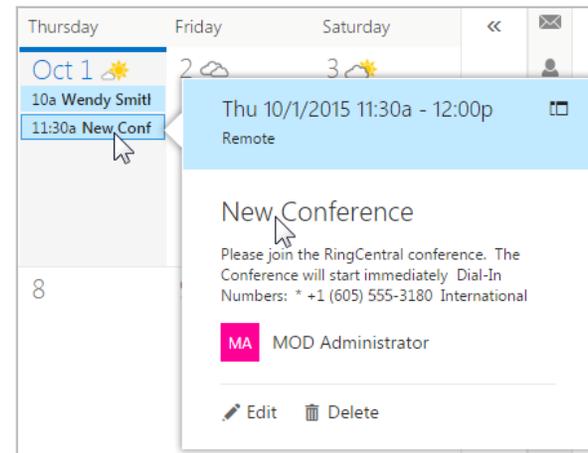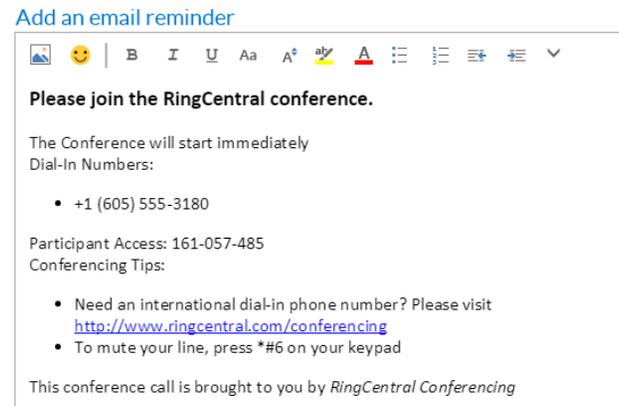
Figure 33

Figure 34

Figure 35

Figure 36

Conference Commands

At the bottom of the Conference page, click **Conference Commands** to open the list. (Figures 37, 38, 39, 40)
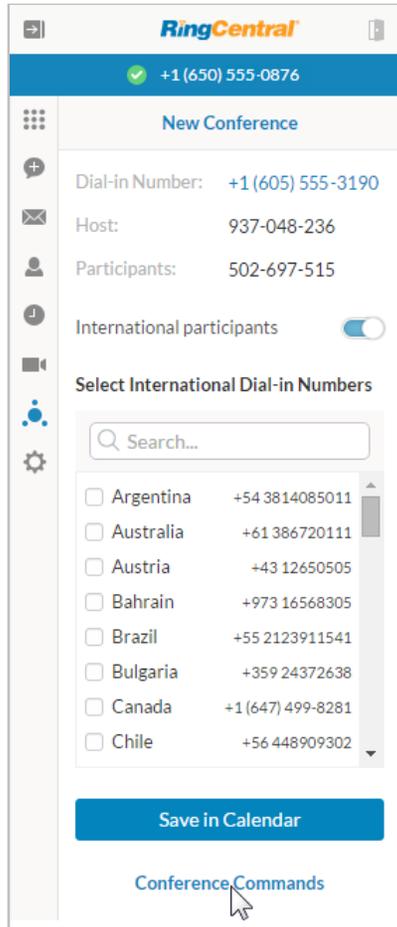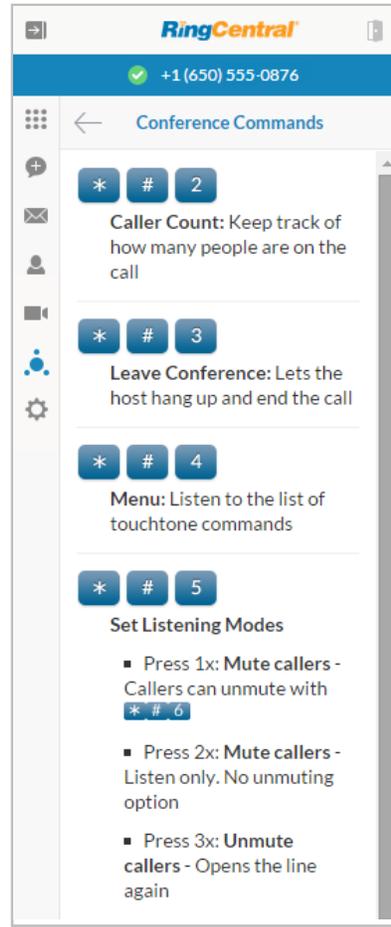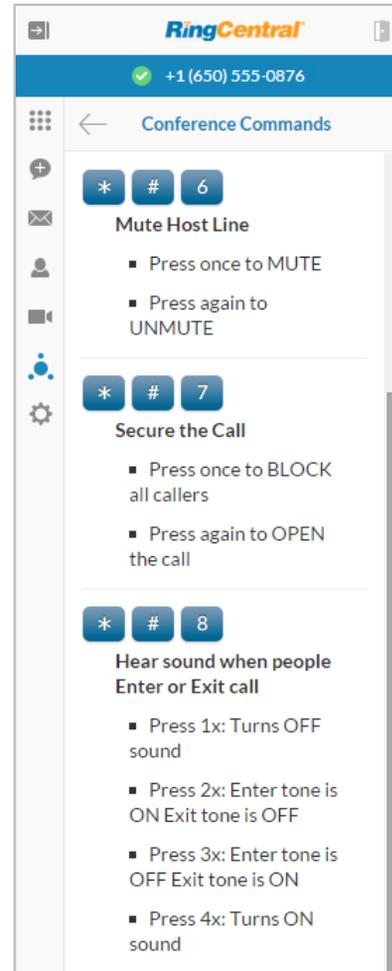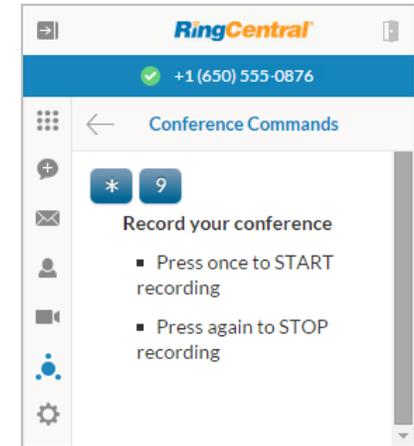

Figure 37

Figure 38

Figure 39

Figure 40

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Settings

Click the **Settings** icon ⚙ to see the version of Office 365 and to view the End User License Agreement. (Figures 41 and 42)
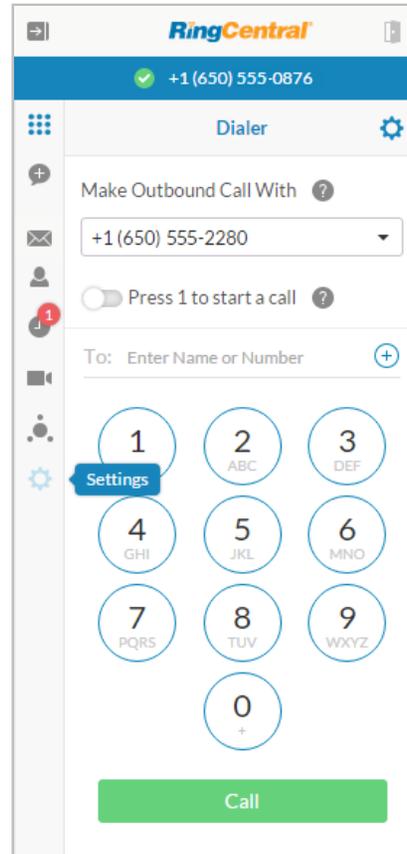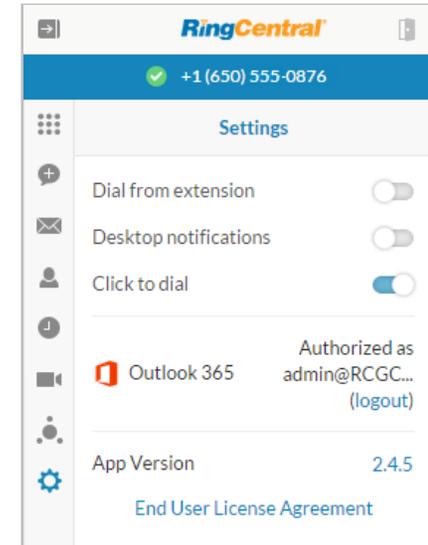

Figure 42

Figure 41