

Add guest team members outside of your Office 365 organization

Video Transcript:

Most of the time, you will add members to a team who have an account with your company's Office 365 organization. But Teams does allow you to add members to a team who are not in your organization. These guest users will need to use a Microsoft account to sign in to Teams. And if they do not already have a Microsoft account, they will be prompted to create a free account. So let's see how this works. Looking at the one team that I've already created, I can go to the menu next to the name of the team just by clicking on this button with three little dots, and there's an option here to add members. This is where I go to invite new members to this team. And you also have this option when you create a team. Now it's important here that you see this line that says, you can also add people outside your organization as guests. If you do not see that line, then you are only able to invite people to this team if they are part of your company's Office 365 deployment. If that is the case, you need to contact your company's Office 365 administrator and ask them to enable guest access to teams. Now if your Office 365 administrator needs to know how to do that, I'll show how to get that enabled at the end of this movie. For now, since I do see that line, I can add guests. I just need to type in that person's email address right now. If that person has an Office 365 or other Microsoft email address, you should definitely use that. But if that person does not already have a Microsoft account, you can send this invitation to any email address, but that guest will need to create a new Microsoft account to sign into teams. So I'm going to invite somebody who uses Gmail, so I'll type in her address. And you can see, it gives me the option to add her as a guest, it specifies that this will be a guest user. So that's good, I'll click there, she has been added, I can add other people if I want, but I'm just going to hit Add Here to add that one person, and then I'll hit Close here. Now that invitation has been sent to Madison. Let's see what happens on her end. So I'm going to switch over to another computer. So here on Madison's computer, I'm signed into Gmail and I see that invitation email from Teams, so let's click on that. This is the email that people will receive when you invite them as a guest. So within this email, there is a link to open up Microsoft Teams, so I'll click on that and we'll start the process of setting up our account. What's happening here is that I will need to create a new Microsoft account that I can use to sign into Teams. This is why it's better to use the guest Microsoft email address, if they have it. If the guest already has a Microsoft account, it saves them the trouble of creating a new account. Since this guest does not have a Microsoft account, she will need to make one, so let's do that. I'll click Next here, it will use this person's email address as the sign-in name for this new

account. If you prefer to set up a Microsoft account that includes a Microsoft email address, there is that option here, but I'm not going to do that, I'm just going to use this email as the username and click Next. And then of course, we'll have to create a password. So I'll type in the password I want to use, and click Next. Now, to confirm the account, it sends a verification code back to the original email address. So let's get that verification code. I'll go back to this user's Gmail account, let's go back to her inbox. Here's that message with the verification code, so I'll click on that. And here is that verification code, it's just four digits, so I'll switch back here and type that in. I do not want to receive promotional emails from Microsoft, so I'll turn this off and click Next. Now they also have another security step where you need to provide a phone number to link to your account. They will text a verification code to that phone number. So I'm going to put in a phone number here, so I'll put in the phone number and hit Send Code. In a moment, I will receive that code as a text message on my phone, and I will type in that verification code from that text message. Then, I can hit Next. And now we see some standard startup screens when you sign into a Microsoft account. I'll click Yes here. And now, Madison has a Microsoft account that she can use to sign into Teams and communicate with the other members of this team. In fact, I can just click on Open Web App and go straight to Teams on the web from here. There are some introductory screens here, you might want to read that, but I'm just going to click Next through here, let's go. And now you can see, she is a member of this team. In the future, whenever she signs in, she will use her Gmail address as the username with the password that she set during this process. Just don't expect everything that we will see in this course to work for a guest user, because lots of the features of Teams are inherently tied to the Office 365 organization. Just be on the lookout for features that work differently for guests. But, there is one more detail. Remember, I promised to show you what an administrator needs to do to enable this feature for your organization. If you do not have the option to invite guests, this is what you need to ask your company's administrator to do. First, let me switch to my administrator's computer. So here I am on a different computer. I'm signed into the Office 365 website as Stuart. Stuart is my company's Office 365 administrator. Now administrators, and only administrators, will have this option here on the Office 365 website, labeled Admin. So I'm going to click on Admin. Within the Admin screen, I need to go to this gear on the sidebar on the left. This is Settings, then I'll go to Services & Add-ins, scroll through this list, and find Microsoft Teams. On this little popup panel, we need to go to this category, Settings By User And License Type. In this menu, we need to switch to Guest, and make sure that this switch is turned on to enable Microsoft Teams for guest users. With that enabled, everybody who uses Teams in this company will have the ability to invite guests to a team.