Microsoft Teams Integration:

Thank you for your purchase of the Microsoft Teams integration. To begin this process, we need to gather some information from your Microsoft Administrator to allow your organizations Microsoft Teams to use Crexendo VoIP services.

Microsoft Licensing:

The Integration will require each Teams User have a Microsoft Office User License and a Microsoft Phone System, or comparable license. Some Microsoft packages provide both, but most require the phone add-on license to be purchased separately. You will need 1 additional license then your order to complete the integration.
(10 users will require 11 licenses for the setup)

Please confirm that your users have a one each of the licenses from each group on this link: https://docs.connecttoteams.com/en/articles/11-microsoft-licensing-for-the-connector

For any questions regarding licensing contact Microsoft support.

Once the licenses have been secured, and added to the individual users, our next steps are to begin enabling our services on your Office 365 Instance.

Beginning the Setup:

Our Team will be sending an email invitation to our connection software to the Microsoft Enterprise Admin to start the integration setup. You can follow the steps here to know more about the setup of the integration: HYPERLINK "https://connecttoteams.elevio.help/en/articles/15-enterprise-start-provisioning" https://connecttoteams.elevio.help/en/articles/15-enterprise-start-provisioning

Once the invitation have been accepted, your MS Office instance will be asked to connect to our TEAMMATES EPP system: HYPERLINK "https://connecttoteams.elevio.help/en/articles/17-microsoft-permissions-for-the-enterprise-provision-portal-epp" https://connecttoteams.elevio.help/en/articles/17-microsoft-permissions-for-the-enterprise-provision-portal-epp

After all of the above is completed, the next step for your team is to setup the Direct Routing. This will act as the connection between your MS Office Domain and The Crexendo VoIP System. HYPERLINK "https://connecttoteams.elevio.help/en/articles/19-set-up-direct-routing" https://connecttoteams.elevio.help/en/articles/19-set-up-direct-routing

Upon completion of the above steps, our team will verify that we see all of the connections within our integration and begin the process of creating, connecting and licensing out the users and permissions from our integrations side.

Please note that our team may take up to 48 hours to configure users, as the Microsoft Server user, and MS Teams propagation will take some time to configure each user.

Our team will send an email, upon completion of the users being successfully integrated into the system, and as for you to confirm the changes on your end by signing into the system and syncing over the new settings and configurations for each user:
HYPERLINK "https://connecttoteams.elevio.help/en/articles/32-user-setup-individual"
https://connecttoteams.elevio.help/en/articles/32-user-setup-individual

After the sync with the teams server is complete, the final steps are to enable and allow calling on each user. You can find the steps to complete this step in this article here: HYPERLINK "https://connecttoteams.elevio.help/en/articles/36-enable-calling-as-microsoft-enterprise-admin"
https://connecttoteams.elevio.help/en/articles/36-enable-calling-as-microsoft-enterprise-admin

Your MS Admin will then need to create the Custom application to connect TEAMS and Crexendo together. This is just a quick process of naming the application and allowing it to connect to your instance of MS Teams: HYPERLINK "https://connecttoteams.elevio.help/en/articles/41-build-the-teams-application"
https://connecttoteams.elevio.help/en/articles/41-build-the-teams-application

Next, you will need to add the TEAMS App to each users individual MS TEAMS instance. This must be done by the Enterprise admin or the MS TEAMS admin, as it may require an admin password to complete the installation.

Once all the users have the custom app installed and see the Calls Icon appear on the left side column you are ready to use your new Crexendo MS TEAMS softphone.

VIP MS Teams Integration- Adding Users- Customer Side

We will next walk you through adding users to the MS Teams Integration and through the Crexendo VIP Portal. An Office Manager and the Microsoft General Administrator with access to the teammates integration must complete the following steps.

1.Work with the CrexendoVIP team to get your MSTeams instance registered and onlined with our integration.

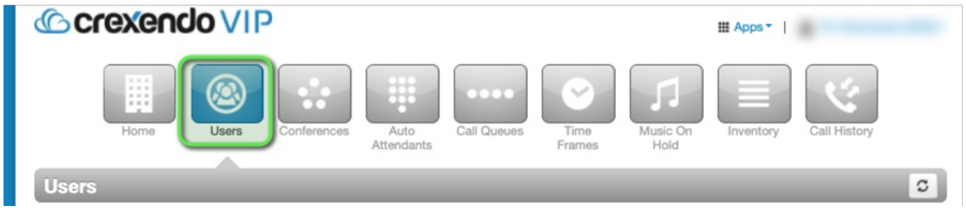
   a. This will require you to have the Direct Routing user setup on our Office 365 instance
   b. Add all of the required licenses to your users on the serverside

c. For more information or questions on setup and Microsoft licensing, please follow this link https://connecttoteams.elevio.help/en/articles/11

2. The steps 3-10 may not be needed if your Project Manager setup your Crexendo VIP account imported all your user data ahead of the cut date.

3. Open the CrexendoVIP Portal and login https://portal.crexendovip.com/portal

4. Click on the Users button on the top navigation row



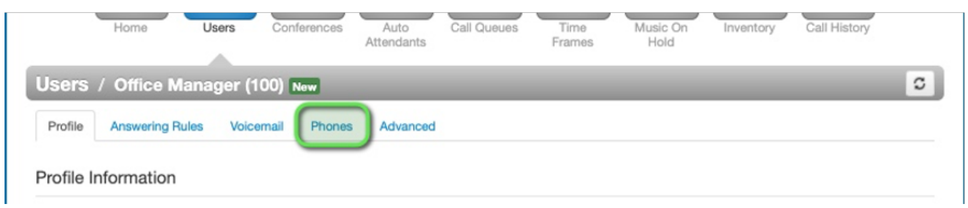
5. Click the Users name that you wish to configure the Teams Integration on, this will bring you to the users Profile Information page.

6. Scroll towards the bottom of the page to the "Change Account Security Section"

7. Confirm the email address listed here matches the users Office 365 email address.

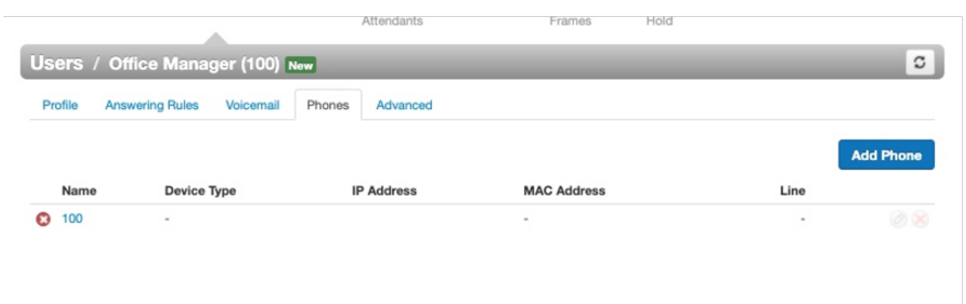
8. Now that the email address has been confirmed we can move onto Device Creation.

9. Scroll back up and click the Phones link under the gray user bar.



10. The Phones screen will show you all the individual user's devices. (If the MS teams phone will be the only device the user is utilizing you can select that extension)

11. Click on the add phone so that we can add a new device for Microsoft Teams.



12. We are now in the add a phone creation screen.

A. Phone Suffix- Add a T. We use T to indicate a MSTeams extension.

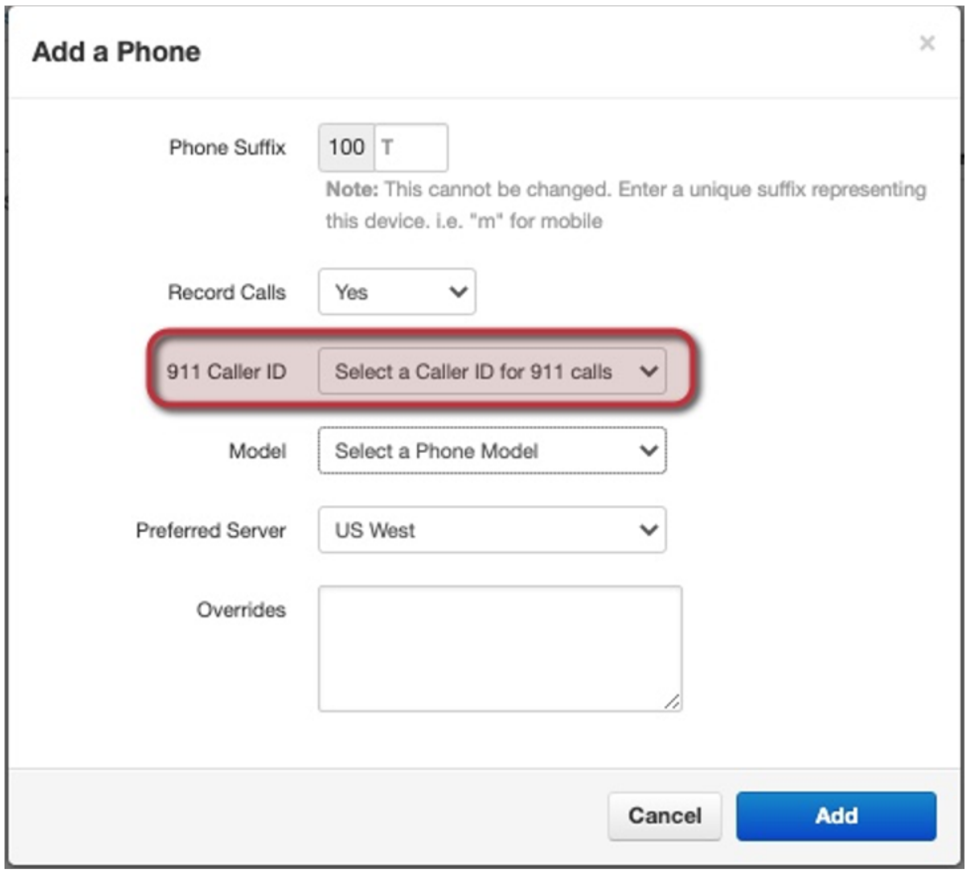
B. Assign a 911 Caller ID from the drop down. It is REQUIRED to complete the registration.

C. Model- Leave as "Select a Phone Model"

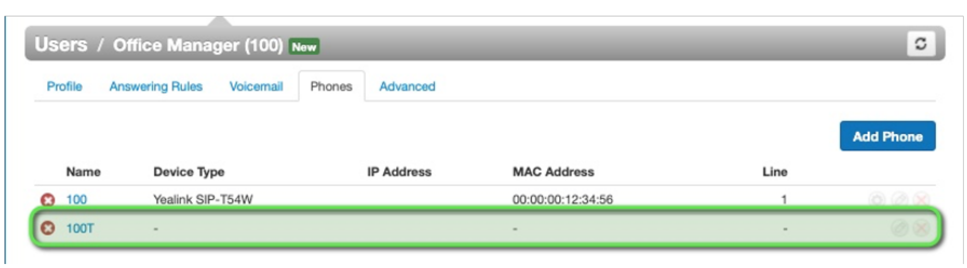
D. Preferred Server will automatically choose the closest to your location.

E. Overrides- Leave Blank

F. Click the Add button



13. Once completed successfully you will see a new device listed under the phones section

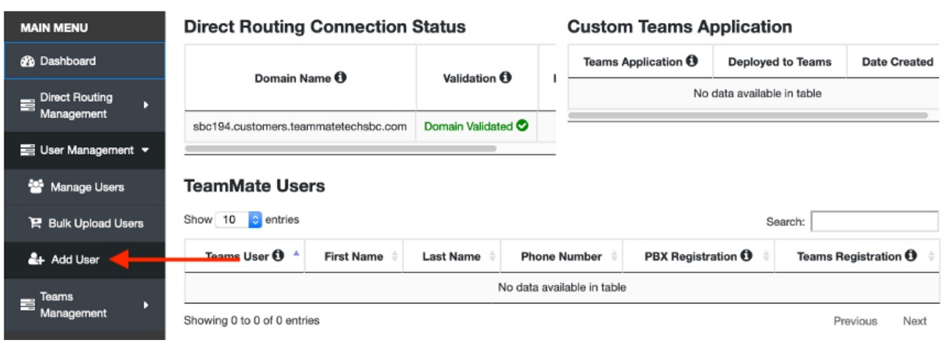


14. Complete the above steps for all users who will be using the MS Teams phone integration.

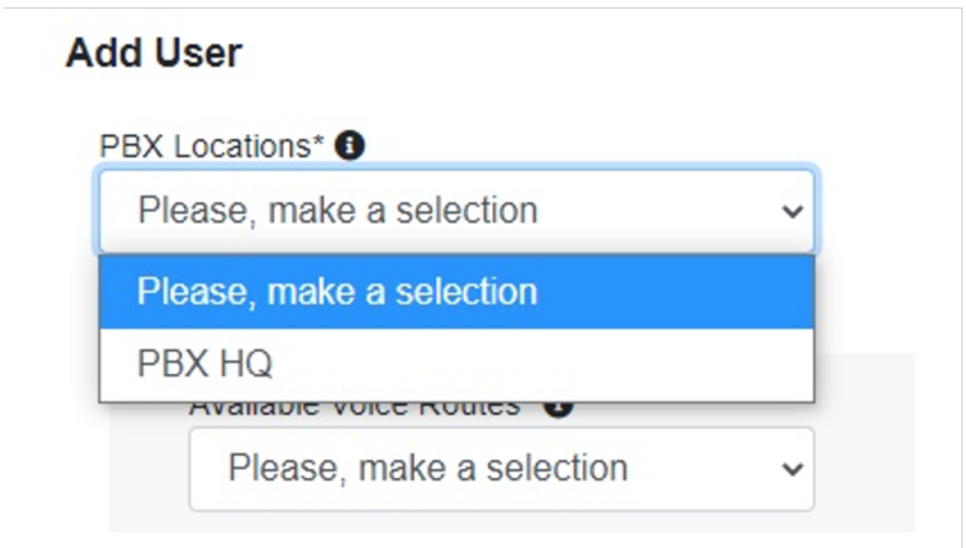
15. Once all users are created the Office365 administrator can sign into the MS Teams Integration tool. (You will need to login via the email sent to your Microsoft General Administrator account)

16. Now we are going to add the users to the Teammates Integration.

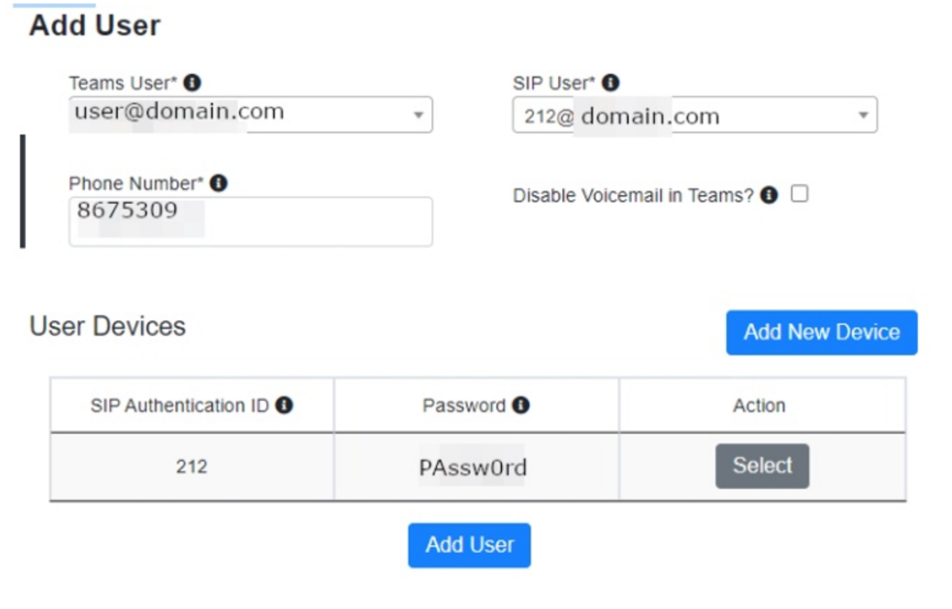
17. Navigate to User Management>Add User



18. Select the appropriate PBX location.



19. For each CrexendoVIP user created there will be an option to use an existing endpoint on the PBX or to create a new one. Upon selecting the SIP user from the dropdown, all existing devices registered to that user will populate. Here you should see the new phone we created that ends with T, for example 100T. Here is a preview of the screen and what we will be editing.



20. In the phone number field change the automatically populated number to the corresponding users extension.

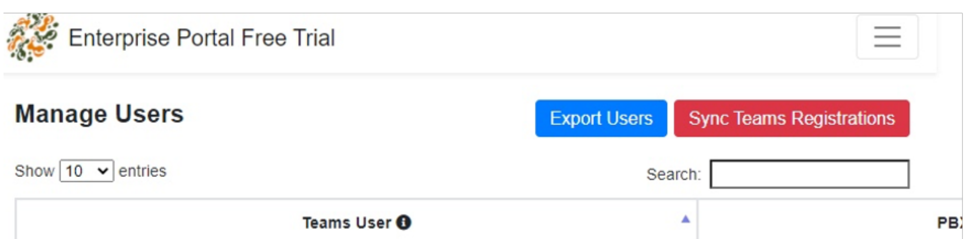
21. Check the Disable Voicemail in Teams Box for message to be left on the CrexendoVIP phone system.

22. Click Select on the device associated with the Teams extension under the Users Devices section.

23. Once all the fields have been filled out and a device has been selected, press the Add User button to create the new user connection.

24. Repeat for all users using the MS Teams Integration

25.Once all the users are added you will see a Sync Teams Registrations button

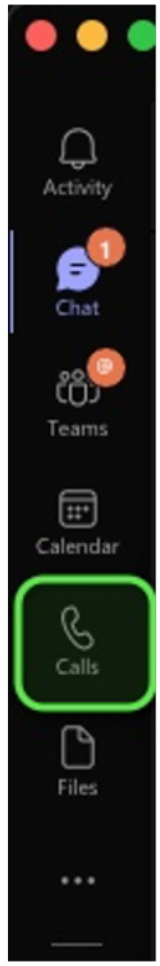


26. Press this button to sync all users. (if the button is missing, the system sent over the registrations via live update)

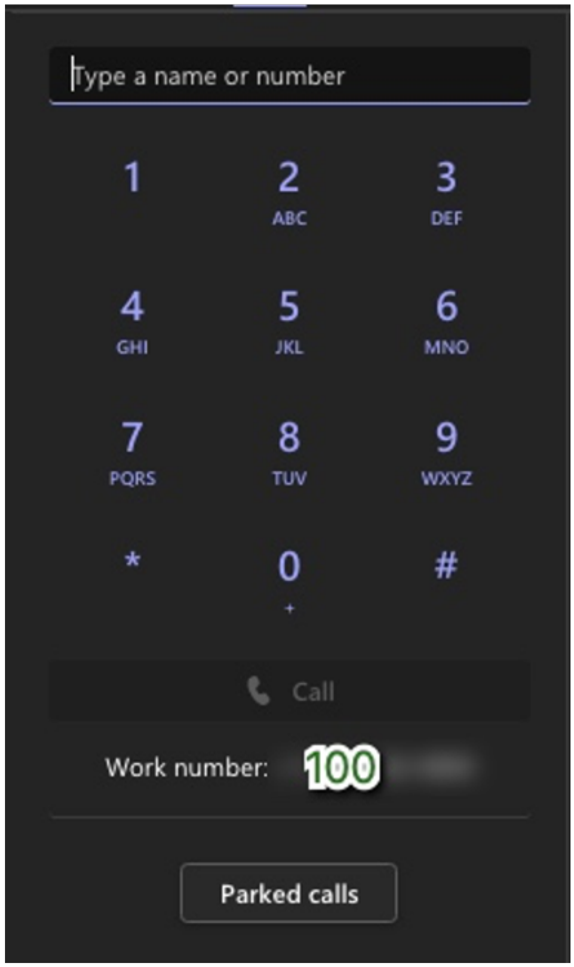
27.Once synced, the CrexendoVIP portal will now show the phone we created as registered to MS Teams.

28. Once all users are registered, have them all LOGOUT AND LOG BACK IN OF ALL MS TEAMS APPLICATIONS.

29. Upon logging back into Teams the user should now see the Calls icon on their MS Teams



30. The user will now have a dialpad that shows their extension in the work number field.



Now that we have successfully integrated teams, let's go over a few quick pointers that will help you take advantage of teams to its fullest intent.

Ensuring your Computer is Ready

Before using Teams to make a call, receive a call, or to attend a meeting, we need to configure a headset properly.

1. Ensure your headset is plugged into your computer

2. Click your profile picture at the top of the app, then select **Settings** > **Devices**

3. In the *Devices* section, your headset should appear in the

4. Under *Audio Settings* → choose **your headset model**
5. Under *Speakers*, choose **your headset model**

6. Under *Microphone*, choose **your headset model**

7. Under *Secondary Ringer*, choose **Speakers/Headphones (Realtek® Audio)**

8. Your final settings should be shown as follows:
   (INSERT IMAGE HERE)
9. Choose **Make a test call**

10. What will occur is that you should hear the test in your headset. When prompted, record a test message. Wait a few second and your test message will play back to you.

11. At the end a summary will display on the screen. Your test call results should show all green. If you do not have a camera, then all will show a red alert icon. This is ok. Choose **Close**.

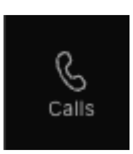
Making Call with Teams

Teams integration allows you multiple ways to start a call. The next section is a quick reference on each way.

STARTING A CALL USING THE DIAL PAD

The Dial-pad can be used to dial internal extensions and external calls outside of your Organization.

1. **Navigate to the Calls icon on the left of teams**

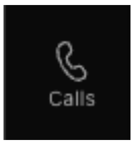


2. **Using the DialPad, type the number or internal extension yoo would like to call**
3. **To start the call after dialing, click the Call Button Icon**

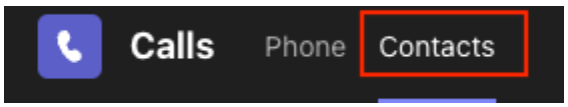
STARTING A CALL USING A CONTACT

Teams shares a contact section with Outlook. You can add a contact in either Teams or Outlook.

1. **Navigate to the Calls section**



2. **Click Contacts at the top**



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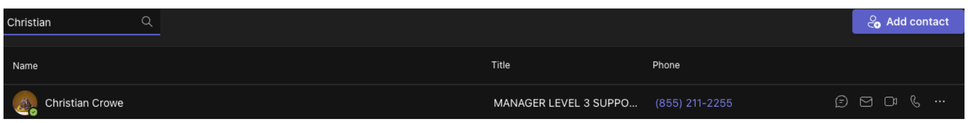
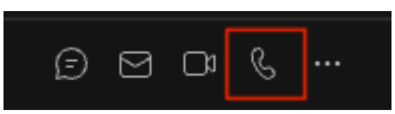
3. **Here you will see a list of your Contacts**

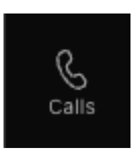


4. **Click the Phone Icon to direct dial the contact.**

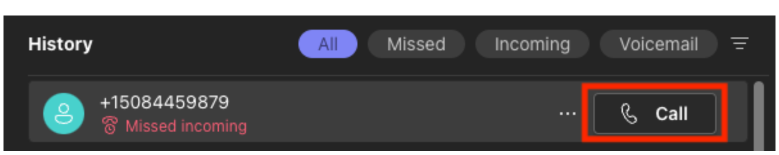


STARTING A CALL using HISTORY

1. **Navigate to the calls section.**

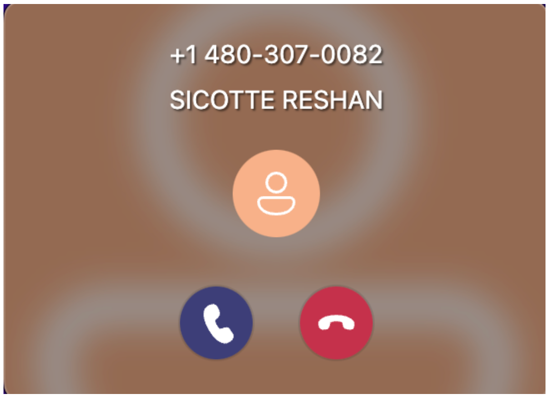


2. **Call History will be listed on the right.**
3. **Hove over the call history entry you would like to call**
4. **Click the Call Icon**



ANSWERING A CALL USING TEAMS

1. When someone calls you, you'll get a notification in the corner of your screen that lets you accept or decline the call. You can answer by clicking on the phone icon on your screen or your headset.

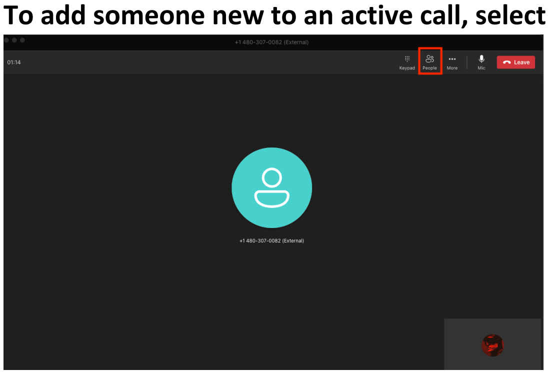


2. Click the Phone icon to answer with audio only.
3. Click the Video icon to accept the call and enable video as well.

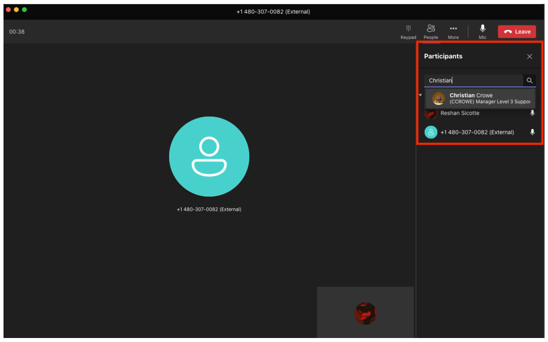
Adding someone to a call

Multi-party calling is allowed. A maximum of 50 people can be added to a call.

1. **To add someone new to an active call, select the Show participants icon in your call control**



2. **Then type their name or phone number in the search box and hit enter or click their contact. This will add them into the call**

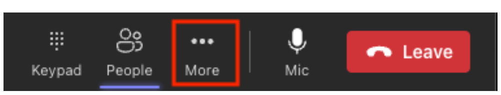


TRANSFERRING A CALL

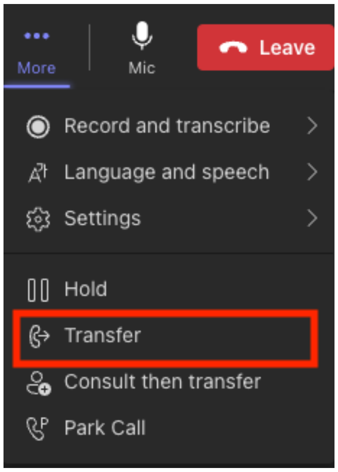
Teams provides the ability to transfer a call to another user. There are two different transfer types that Teams allow, Blind Transfer and Consultative Transfer. A blind transfer will automatically send the customer to the extension you are transferring to. When the transferring agent receives the transfer, it will be the customer. The second type of transfer is the consultative transfer. This will allow the transferring agent to consult with the receiving agent before bringing the customer on the line.

Blind Transfer

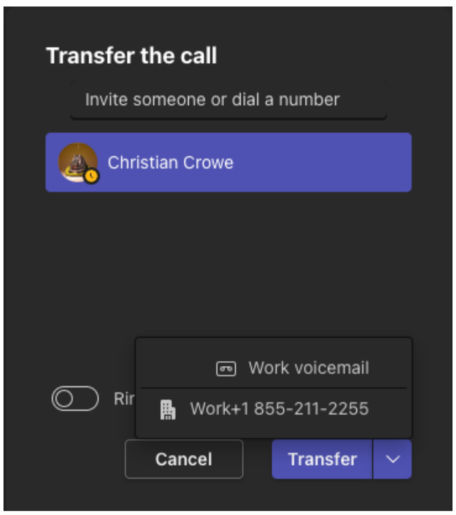
1. To transfer a call, select **More options**



2. **Transfer** in your call controls.



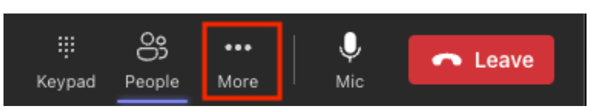
3. Type the name of the person you want to transfer the call to and select them. You can also dial a nmber to transfer to
4. Click the drop-down arrow in the **Transfer** button to see more transfer options.
5. Choose **Work** to transfer the call to their Teams number, or **Work voicemail**



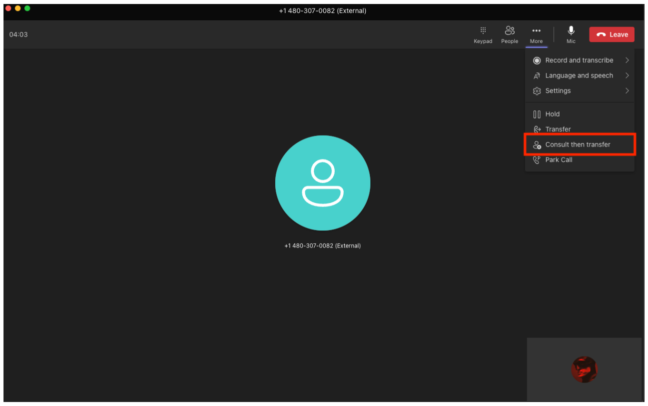
Consultative Transfer

Consultative transfer allows the person to consult with the person prior to transferring the call. This may be done via the phone or using Chat. (Physical phones do not allow chat).

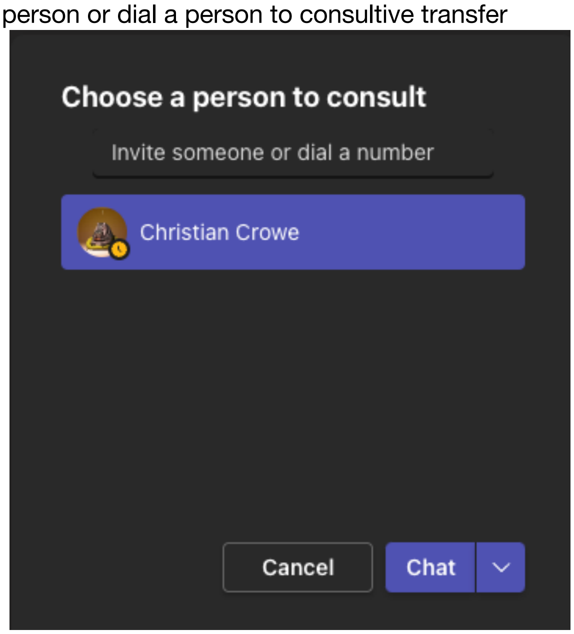
1. To transfer a call, select **More options**



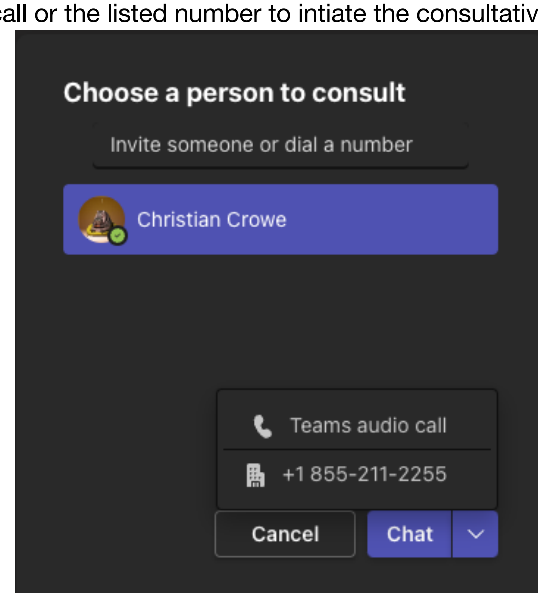
2. Select Consult and transfer



3. Invite a person or dial a person to consultive transfer



4. The Chat Icon will turn pruple. Click it to start a chat with the person receiving the transfer
5. To initiate the transfer click the drop down arrow to the right of the Chat button and select teams audio call or the listed number to intiate the consultative transfer



6. Teams will dial out to the user you searched, here you can consult further.
7. When ready to transfer, click the transfer button in the call controls.

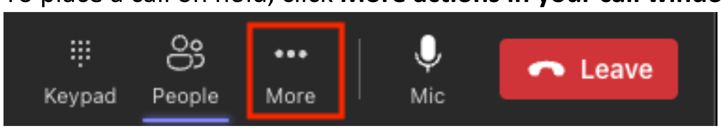
Call Park

Microsoft Teams offers many different types of clients from mobile, desktop or web (using Chrome). Therefore, a call can be picked up from any device. You may want to transfer the call to another device. This is done by using Call Park. By using Call Park, the call is temporarily put on hold so it can be picked up on another device by using a Pickup code.

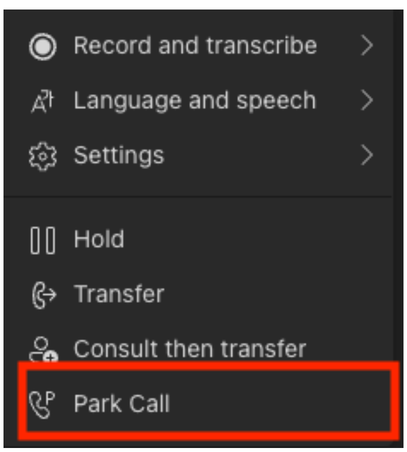
Parking a Call

To move a call from one device to another.

1. To place a call on hold, click **More actions in your call window.**



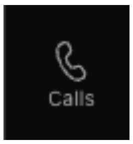
2. Select **Park Call**



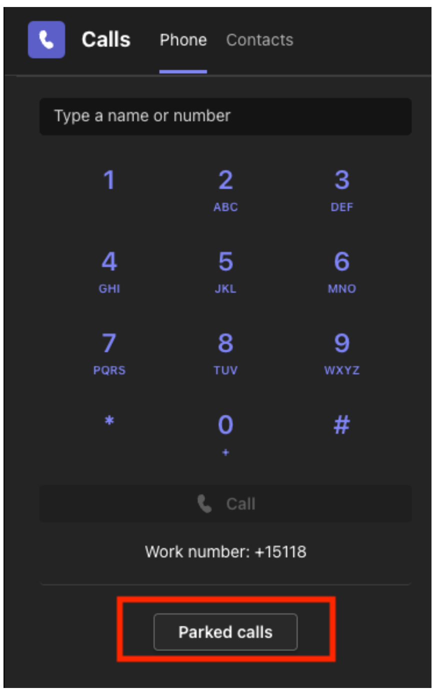
3. When successfully parking a call, Teams will provide you with a park. It is essential to remember this number in order to retrieve your parked call. You can copy it to your clipboard by pressing the copy code button.

Picking up a Parked Call

1. Navigate to the calls section

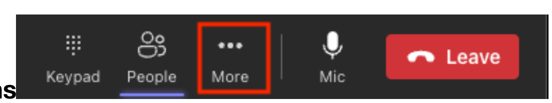


2. Click the Parked calls button.

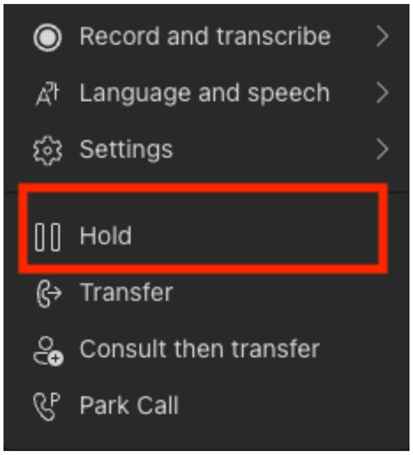


3. Enter your parked call code and click pick up call
4. The call will now be active on your line again

Putting a call on hold



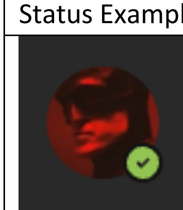
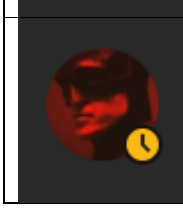
1. To place a call on hold, click **More actions**
2. Select **Hold**.

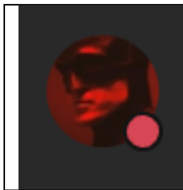
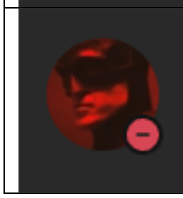


3. Everyone in the call will be notified that they've been put on hold, and you can continue your call by clicking **Resume**.
4. People on hold (including you) won't be able to see or hear anyone else on the call. Screen sharing is suspended, too. Everything will return to normal once you resume your call.

Understanding whether a person is available for a call

Listed below are the different presence stats that a user can put themselves into. It is helpful in knowing a member's status before attempting a call. The status of Do Not Disturb (DND) Can cause calls not to be completed.

Status Example	Description	Status Marking
	Person is actively working and available	Green Check Mark
	Person has stepped away	Yellow Clock

		Person is busy, the phone will still ring if called. (they may already be on an active call)	Red Dot
		Person has set themselves to Do Not Disturb(DND) they will not receive a call if dialed	Red dot with a minus sign