## Logging In

Login to Microsoft Teams account with the MS Teams Integration for UCaaS enabled. Enable two-factor authentication if needed.

If this is the first time you have logged in, you'll see the Welcome message that lists the phone number assigned to your account, click the "Get started" button. A "Getting Started Wizard" will guide you through the environment on first login.
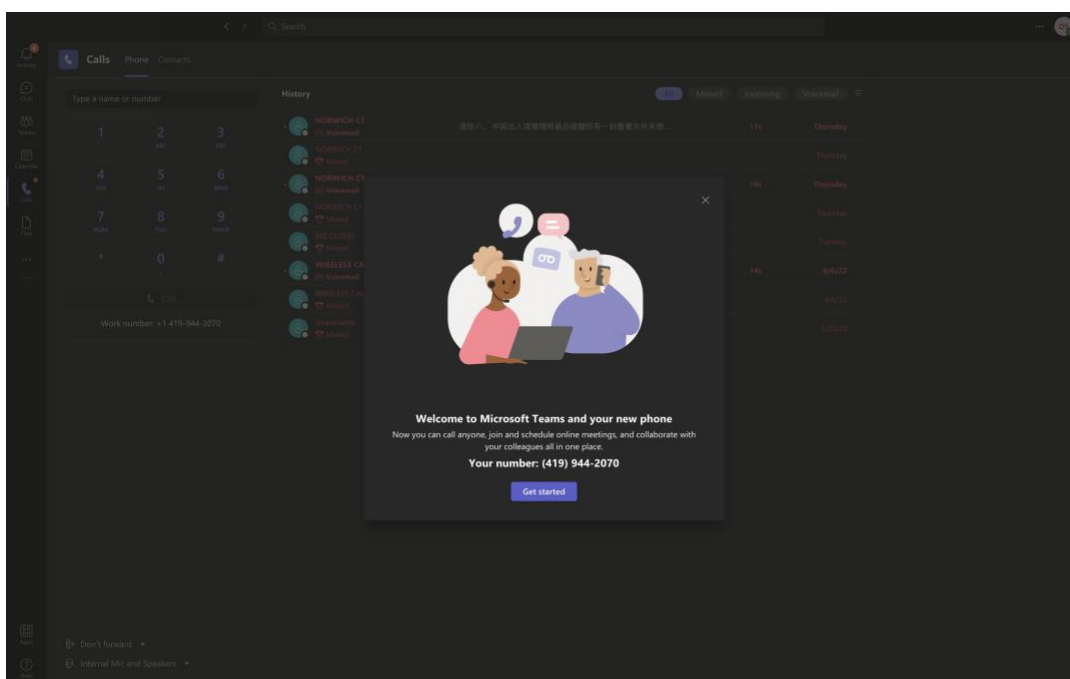
Handling Calls

In Microsoft Teams, on the left-hand navigation pane, click on the "Calls" icon to access the calling section.

You'll be presented with two tabs on this page. The first one is "**Phone**" and the other is "**Contacts**". On the Phone tab, you'll be presented with a number pad for outbound dialing. Below the number pad you will see your assigned Work Number listed as well.
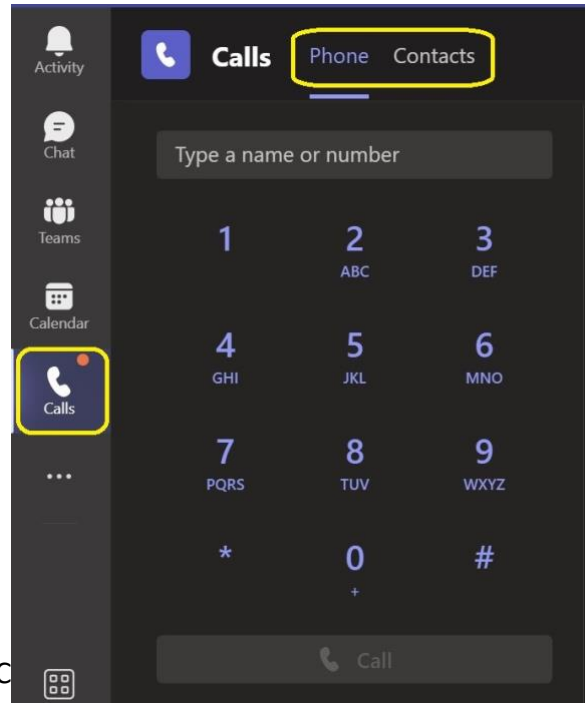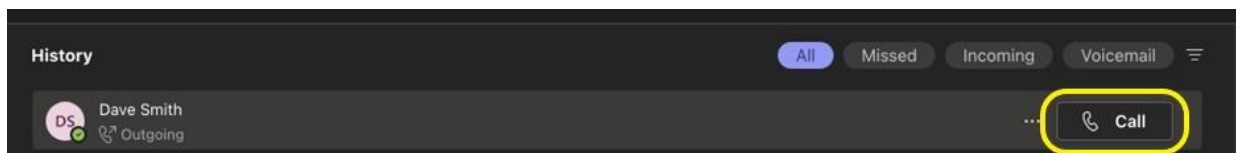

To the right of the number pad is the Call History. C

- *All*
- *Missed*
- *Incoming*
- *Voicemail*
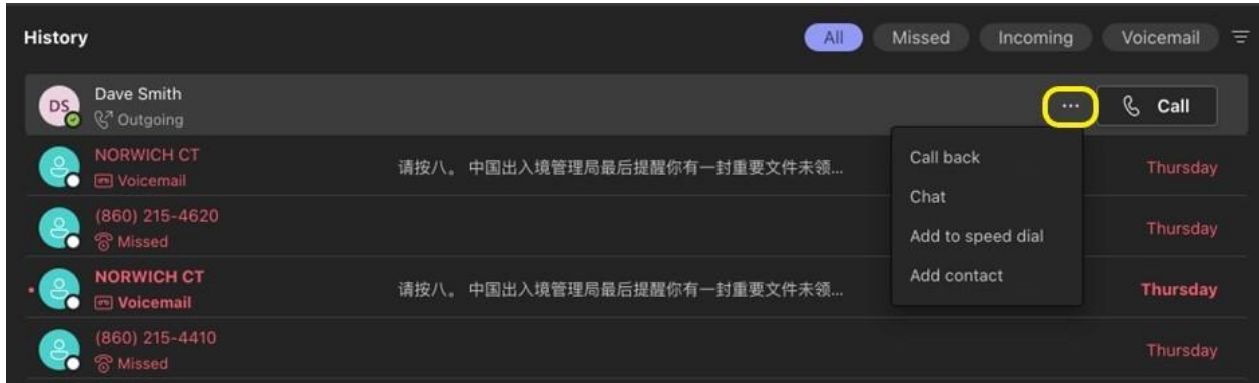- *Search by name or number*

Click on an individual call in the history and you will have the option to call that number back.
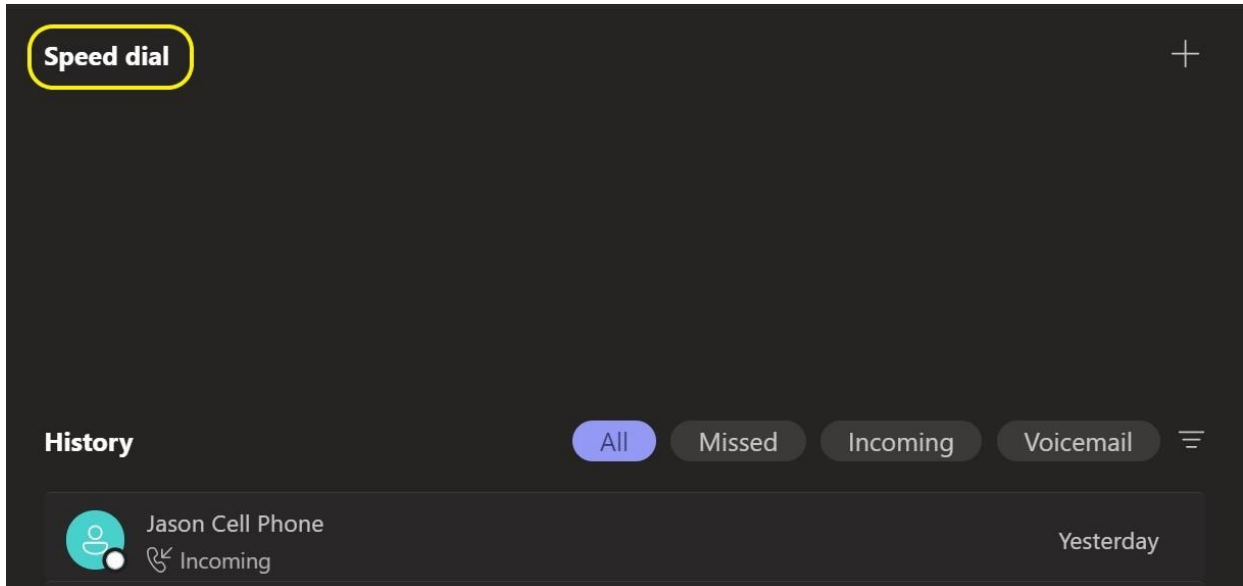
You can also click on the three dots to take additional actions:
- *Call back*
- *Chat* (requires that call to be from another Teams user)
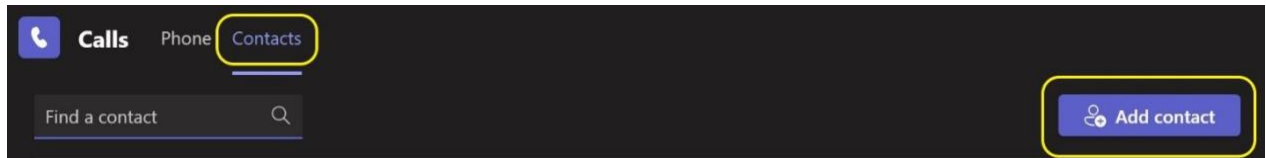- *Add to speed dial*
- *Add contact*

Speed Dial and Contacts

Directly above the Call History list, you will find the Speed Dial section. To add numbers to the speed dial list you must first setup Contacts.
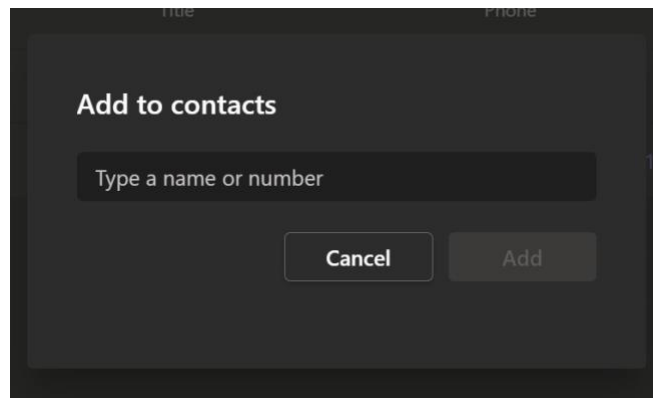
Adding a Contact

Click the Contacts tab at the top of the page, just above the dial pad. On the Contacts tab, click the "**Add contact**" button
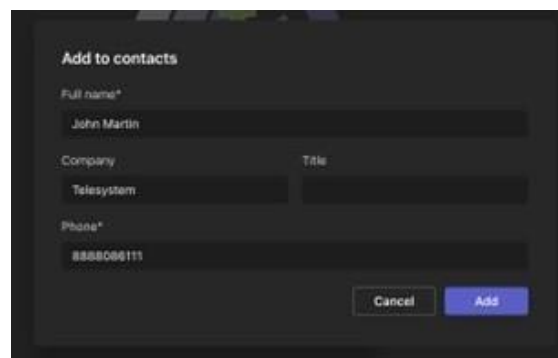

Type the name of a person within your Microsoft Teams directory, or a phone number for an external contact you would like to add.


If you type in a phone number, additional fields will become available including:

- *Full Name*
- *Company*
- *Title*
- *Phone Number*

The full name and phone number are required fields and must be populated. All other fields are optional.

Once you have one or more contacts added, you can manage them from this page or use it as a personal phone book with options to click-to-call internal and external contacts, or message, email, or video call with other Microsoft Teams contacts.
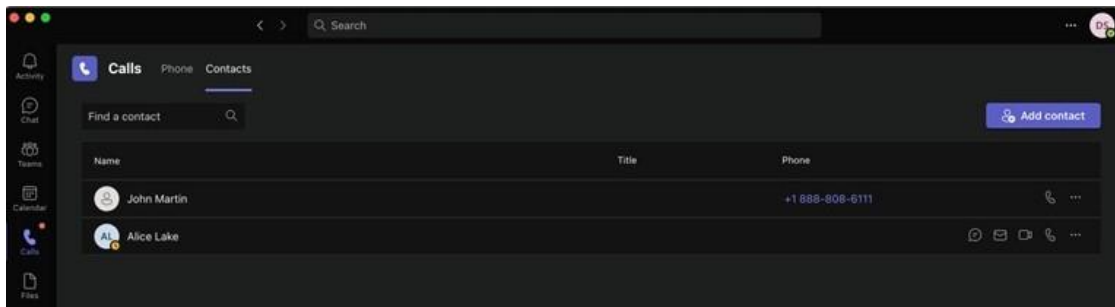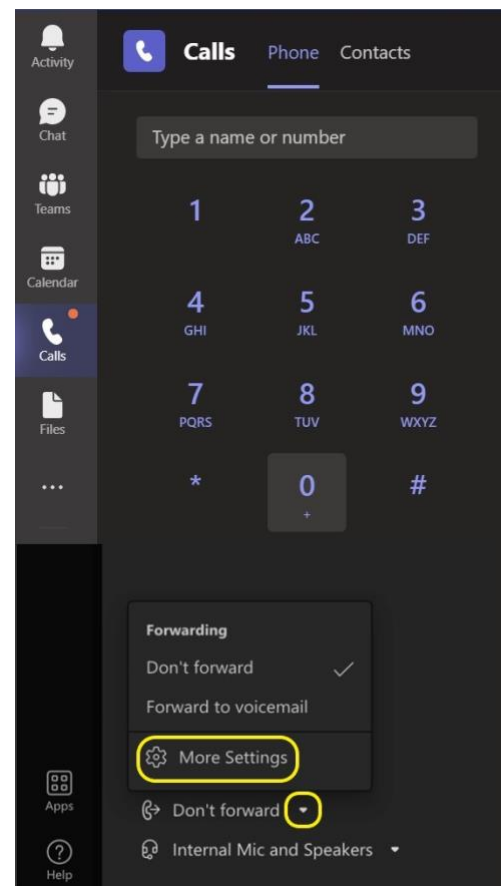

Call Forwarding and Additional Options

Below the number pad are options to setup forwarding and configure your Internal microphone and speaker options.

With the forwarding, options include:
- Don't forward (default)
- Forward to voicemail
- More settings

When "More settings" is selected, users will be presented with the Microsoft Teams Settings menu.

In this menu, on the "**Calls**" tab, users can customize their call answer rules and Voicemail configuration.

For Call Answering Rules, choose between the following options:
- *Calls ring me*
- *Forward my calls*

When "**Calls ring me**" is selected, user can choose for inbound calls to "**Also Ring**":
- New number or contact
  - Selecting the "**New number or contact**" option will open a text field to add the number or name of the contact you wish to add. Click cancel if you choose not to select this option and return to the drop-down box and select a different inbound answering rule.
- No one else (default option)
  - Selecting this option ensures inbound calls only ring to you.

- Call group
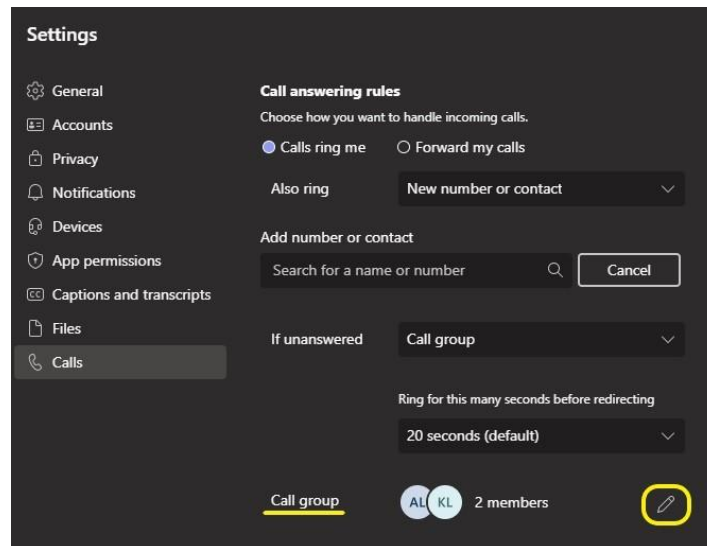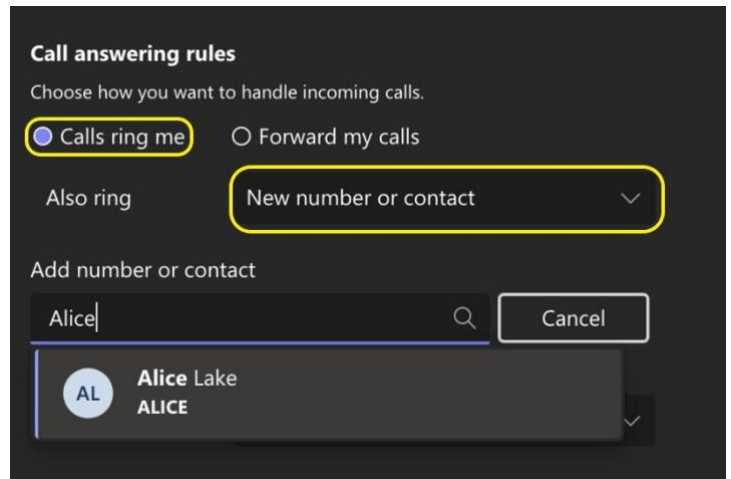
- Selecting the edit icon will take you to a Call group setup screen where you can search and add people within your organization to add to the group and then select how the pattern that calls will ring into each person.
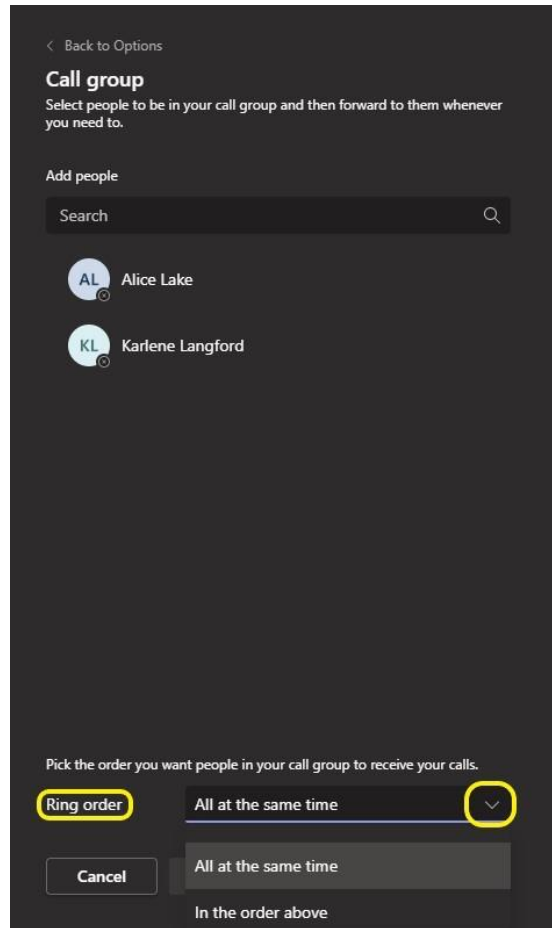
- o The Ring order options include:
  - • *All at the same time*
  - • *In the order above*
- Once you've created your group click save to return to the previous menu.

Once you have configured the inbound ringing options, you can also customize what happens to inbound calls that are unanswered.
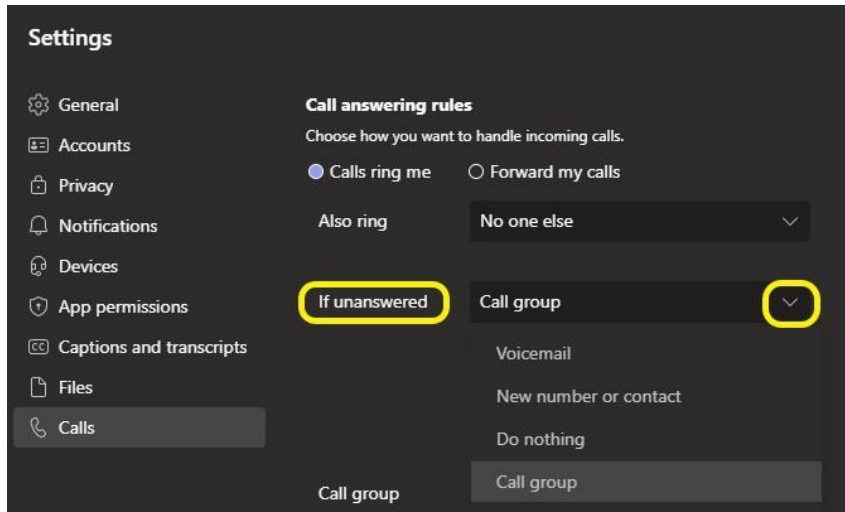
Options include:
- Voicemail (default)
- New number or contact
- Do nothing
- Call Group
  Users may also customize the number of seconds before the call is redirected to a voicemail, new number, or contact, or call group from this section.

Voicemail

The Voicemail section allows for the user to customize their voicemail box within the Microsoft Teams environment. Click on the "***Configure voicemail***" button to access the full set of options.
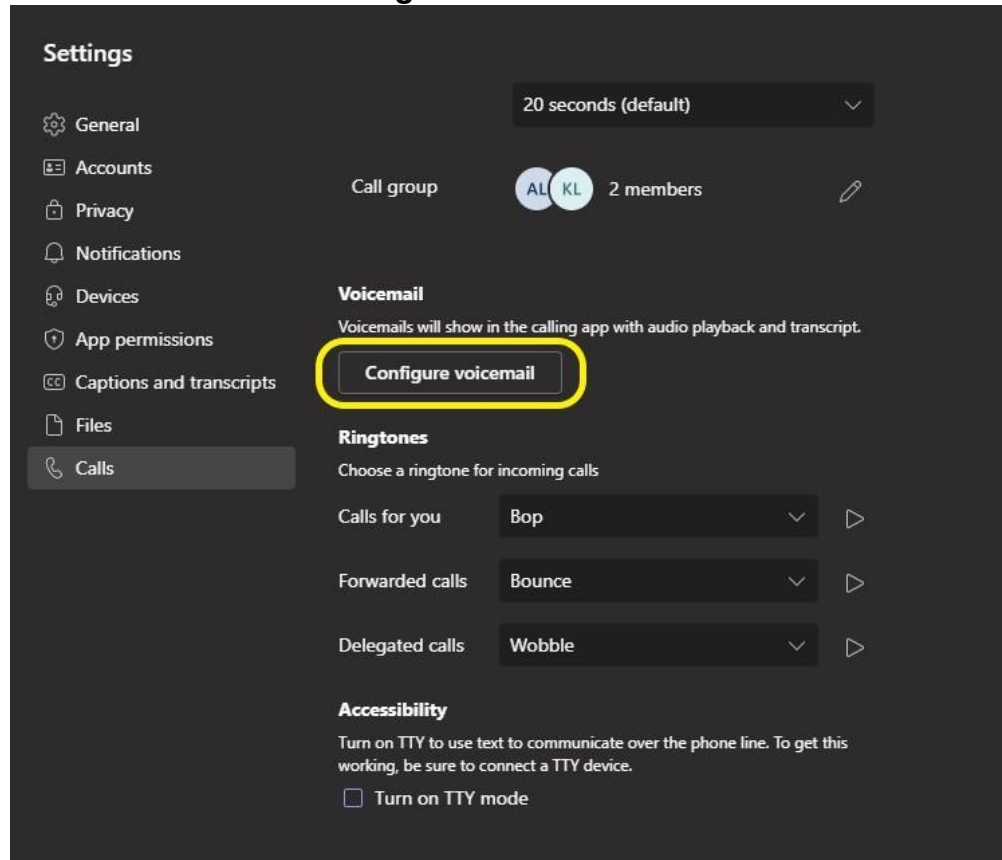

In the Voicemail menu:

1. Click the "***Record a greeting***" button to dial into your voicemail box and navigate the audio to setup the voicemail box and record a greeting
2. ***Call answer rules*** – allows you to choose how you would like to handle your calls when they go to voicemail. Options include:
   a. Let the caller record a message
   b. Let the caller record a message or be transferred to someone else
   c. End the call without playing your greeting
   d. Play your greeting and end the call
   e. Transfer the call to someone else

   If you choose any options that involve a transfer to someone else, an additional field will appear allowing you to type in the phone number or name of where the call can be transferred.
3. ***Greeting language*** – Allows you to set the default language the greeting will be in for system messages, or the default messages provided by Microsoft.
4. ***Text-to-speech customized greeting option*** – Allows the user to type a message that the system's text-to-speech tool will used to play to the caller. You can create different

messages for custom greeting (for regular unanswered calls) and custom out of office greeting (for calls when you are using the out of office notification)
  a. If you record a greeting it will override the text-to-speech customized greeting option
5. ***Out of office greeting*** – allows the user to specify when the Out of Office greeting should be played to callers. Options include:
  a. All the time
  b. When I have an Outlook auto reply
  c. When I have an Out of Office calendar event

Voicemail

You'll find your voicemail messages and transcripts in Calls.

[Record a greeting]

Call answer rules
How would you like us to handle your calls when they go to voicemail?

[Let the caller record a message   ∨]

Greeting language
Which language should your default greeting be in?

[English (United States)   ∨]

Text-to-speech customized greeting option
Do you want to replace the default voicemail greeting with your own text-to-speech greetings? ⓘ

Your custom greeting:

[   ]

Your custom out of office greeting:

[   ]

Out of office greeting
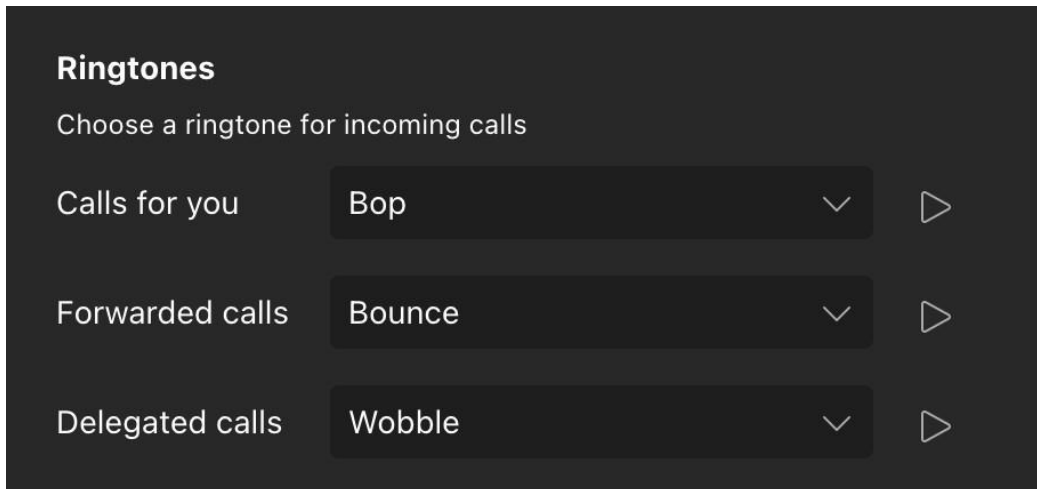When should your custom out of office greeting play?
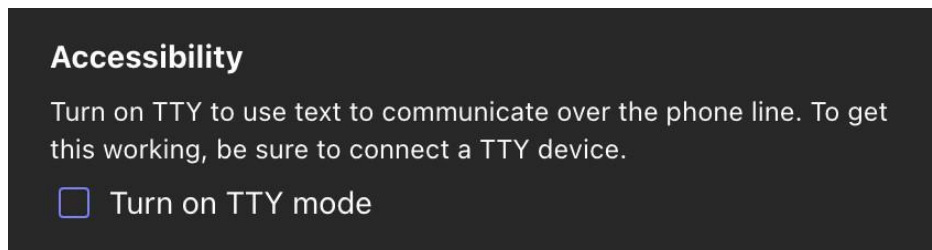
☐ All the time

[Cancel]   [OK]

Ringtones

Ringtones can be configured from the Calls Settings menu. Users can choose to customize the ringtone based on three criteria:

- *Calls for you*
- *Forwarded calls*
- *Delegated calls*

Accessibility

Turn on TTY to use text to communicate over the phone line. To get this working, be sure to connect a TTY device.


Call Handling

While on an active call, you will have a separate window to manage the call. This window will show you the phone number of the person you are speaking with.

In the upper, right-hand corner of the window you can access the keypad if you need to enter DTMF/touch tones, a "**People**" menu which will open a participants list on the right-hand side of the screen which will allow you to add participants to the call to establish a conference call.

The "*More*" option will produce a drop-down menu with options for Device settings, Call health, Hold, Transfer, Consult then transfer, Turn on live captions, Start Transcription, Start recording, and mute notification (note some of these options may not be available depending on the licensing options you have for Microsoft Teams) .
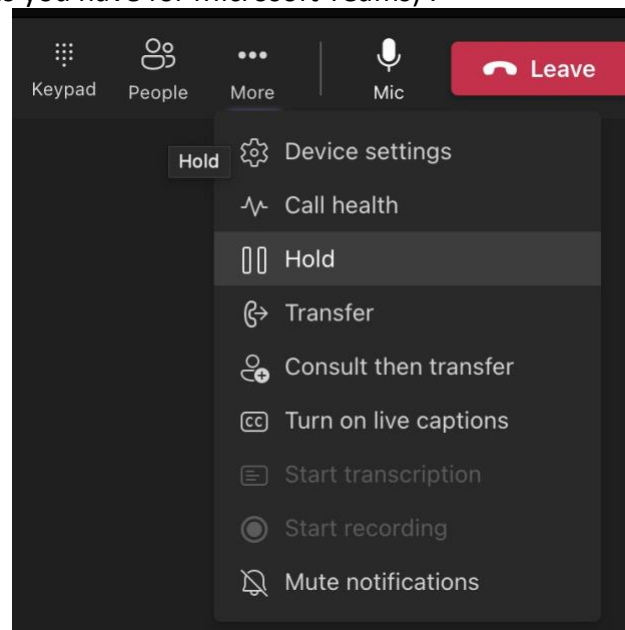
Device Settings is where you may go to adjust the audio devices to switch between internal microphone or a headset you may be using. There are also options to adjust for Noise Suppression.

The *Call Health* will display information about your call such as network packet loss, audio and video bitrates. This information may be helpful if you are having difficulties with the call quality, and you want to troubleshoot with your IT administrator or network admin.

The *Mic* option allows you to mute/unmute your own microphone during the call.

The red "*Leave*" button allows you to disconnect the call. Note that if you are on a conference call/three-way call and you choose to leave the call, the other parties on the call will remain connected.

Checking Voicemail

When you receive a new voicemail message a notification will display in the call history when you are filtering by "*All*" or "*Voicemail*". You will also see a notification in the Microsoft Teams "*Activity*" menu (top option in the left-hand navigation pane).

Along with the notification on the call history, you will also see a brief transcription of the voicemail message.
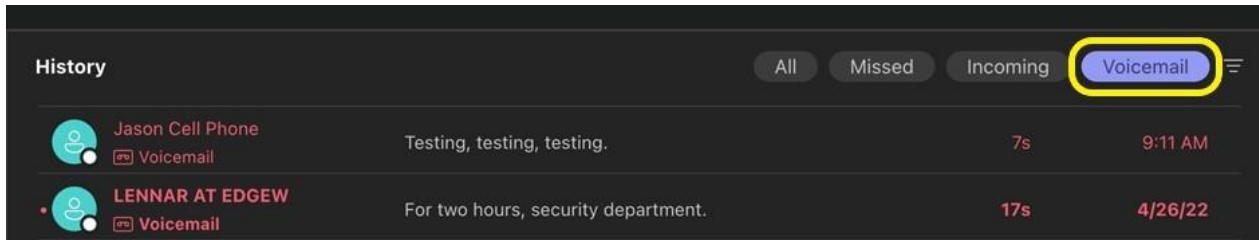
Click on the voicemail message and the Details pane will open on the right-hand side of the Microsoft Teams application. Here you can get the date and time of the message, caller information, transcription of the message, and at the bottom of the application you can click to play the message audio file directly from Microsoft Teams (an option is available to play the message at a faster or slower rate as well.
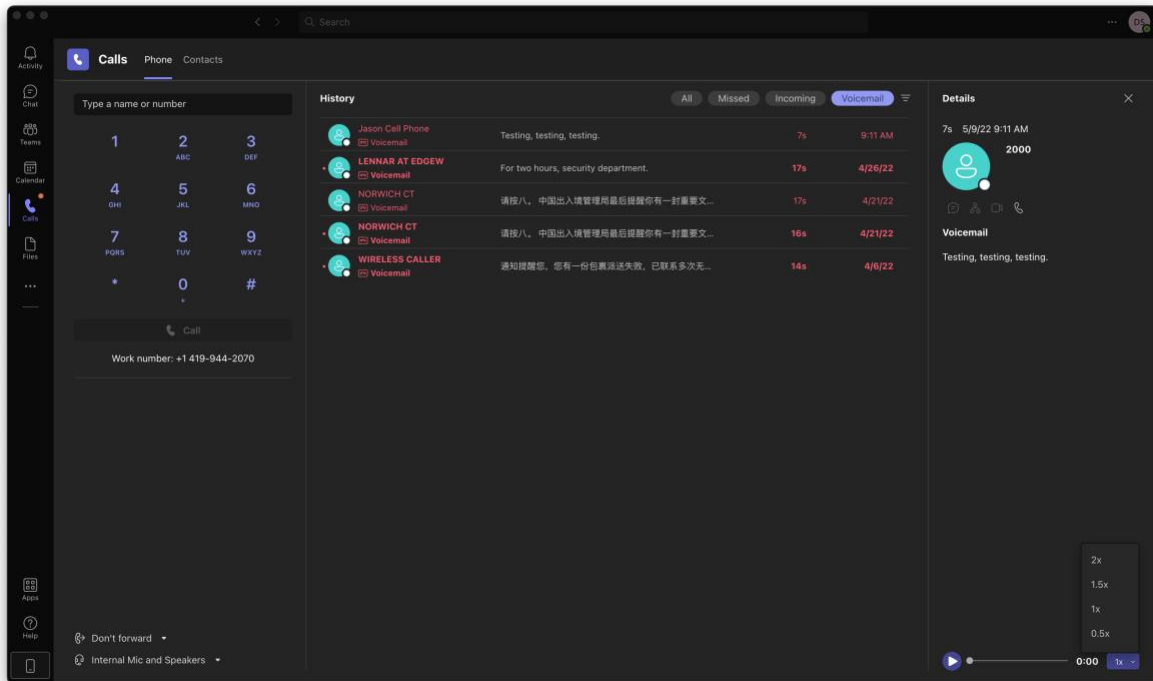
In the call history, you can also click on a voicemail line and the Teams will automatically present you with the option to click to call that party back.
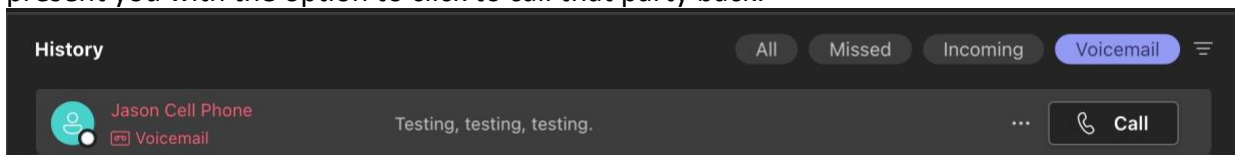
Teams PBX App

Within the Microsoft Teams Application, users can install additional apps to add on more functionality. One app is named "Teams PBX App" which was created by TeamMate Technology.

Users are advised to install this app into their Microsoft Teams environment to receive voicemail notifications

To install the app, from Microsoft Teams, click on the 3 dots in the left-hand menu which will open a slide out menu. In the search bar type in "Teams PBX App". Click on the app in the search results below the search bar.
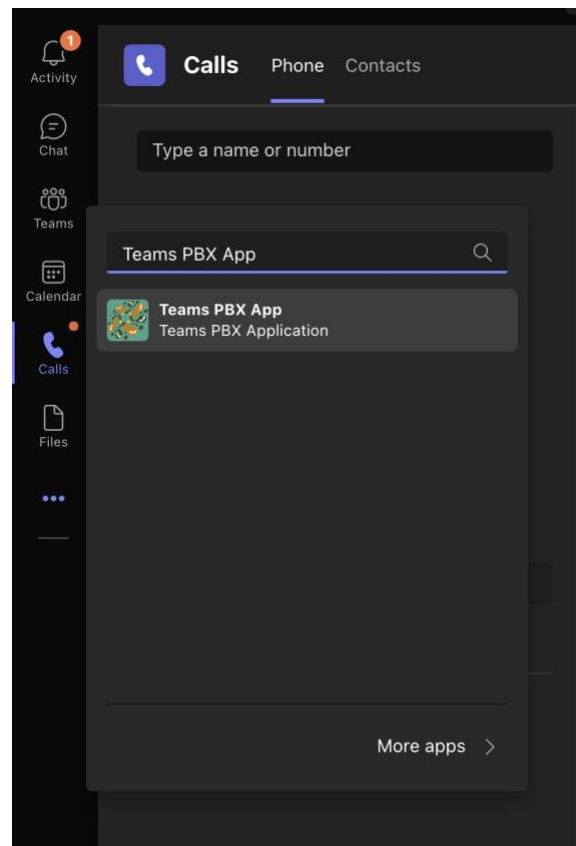
Click the "***Add***" button.
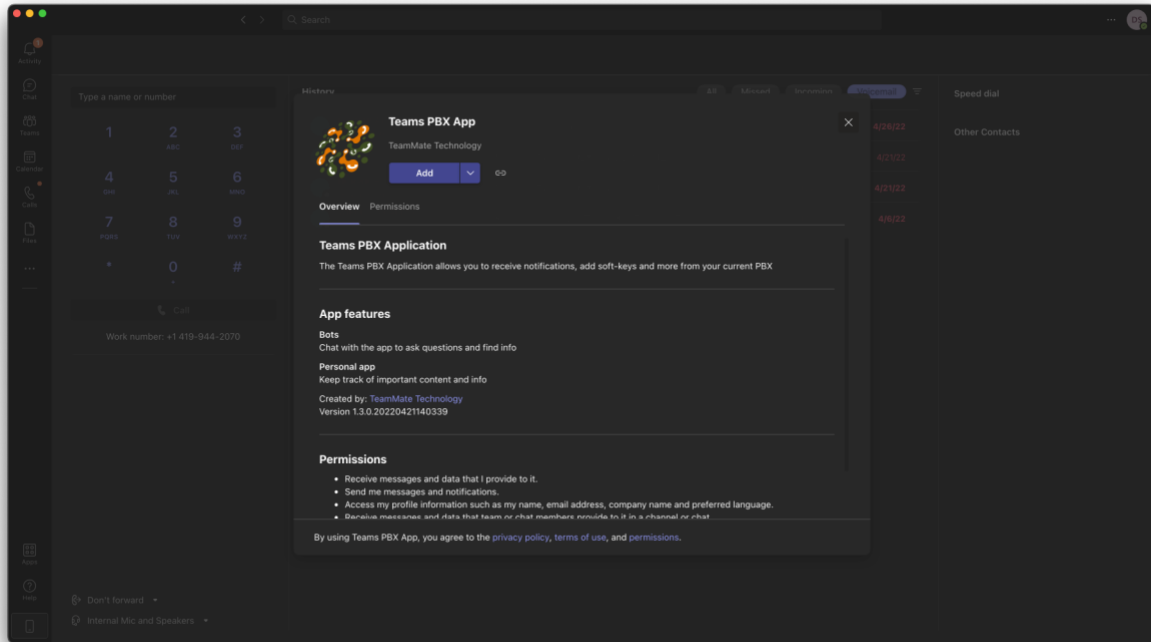
The app will be added to your Microsoft Teams. You may see an icon in the left-hand navigation pane available now and you will receive a welcome message from the chat bot built into the app.