



# Call2Teams Integration

Call2Teams is a simple add-on to your Smart User that connects Microsoft Teams to any PBX phone system in minutes, allowing you make and receive calls on any device using the Microsoft Teams App.

## Important Microsoft requirement

For this service to work, each user within your business will need a Phone System license within the Microsoft Office 365 environment. The easiest way to assign this is to add on a "**Common Area Phone**" license to each of your users or add an "**E5**" license per user. Without one of these, the user will not get the dial pad within the Microsoft Teams application.

Please also note that it can take up to 72 hours for the dial pad to appear. If it does not show up in this time, please contact Microsoft Support or the Office 365 provider.

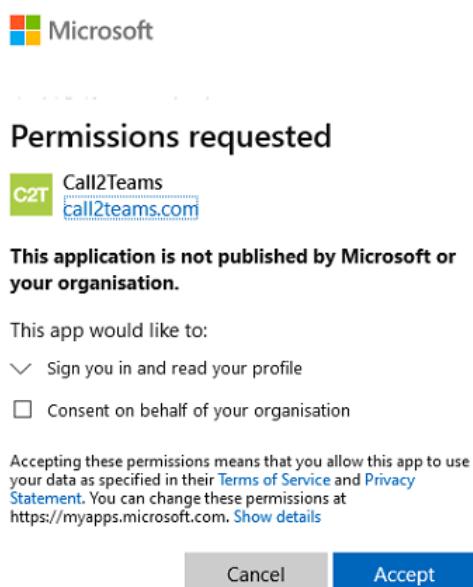
Call2Teams also requires 2 spare Office 365 licenses - please refer to the Troubleshooting section at the end of this document.

## CALL2TEAMS PORTAL SETUP.

### Global Admin User Initial Login

The "**Global Admin**" user will receive an email from Call2Teams, in there is a link they must click on and they will be taken to the portal.

Here they will be asked to login with their Microsoft credentials and will then be prompted with a consent form. They must accept this to proceed:



Once this is done the Global Admin User must select the Services Menu along the top, and select the “**Teams**” tab and then press “**Enable Service**”

The screenshot shows the Call2Teams portal interface. At the top, there's a navigation bar with links for Getting Started, Services (which is underlined), Users, and Account. To the right of the navigation is a Reseller Account / Business Account dropdown and some user icons. Below the navigation, the word "Services" is prominently displayed. Under the Services menu, there are two tabs: "PBX" and "Teams", with "Teams" being the active tab. A modal window is overlaid on the page, titled "Setup of Office 365". It contains text about spare licenses and a note that the sync will start after enabling. There's a checkbox labeled "Enable Sync" which is checked, and a sub-note below it stating: "After the service has been enabled we will start syncing data between this portal and Microsoft Office 365." At the bottom of the modal is a blue "Enable Service" button.

There will then be 2 more consent Windows from Microsoft to be accepted then, if successful, the Global Admin will see a Syncing timer (this usually takes 15 minutes). If there are any errors here, please refer to the troubleshooting section:

The screenshot shows the "Users" section of the Call2Teams portal. At the top left, the word "Users" is displayed. To the right, there's a status message: "Syncing | Waiting for 2 domains to activate in Office 365 : 12:17". Below this, a note says "23 of 25 PBX user licences available." The main content area is currently empty, showing a light gray background.

Once complete the Global Admin can leave the portal and the final step for your Account Manager needs to be completed.

## TROUBLESHOOTING

### Sync Errors

You may come across a similar error to the below when the "Global Admin" user tries to complete the initial "**Sync**" in the Call2Teams portal.

You may get an error around not having any spare licenses in Office 365.

The spare licences are only required once, for the few minutes during the initial set-up process. Once completed you can release the licences.

Within the MS portal you can take up the following free-trial subscriptions without charge for 30 days:

- E5 – 25 users
- Business Premium – 25 users
- Common Area Phone – 25 users (recommended)

The choice of the free trial you take depends on the SKUs you already have - any of the above SKUs will suffice.

Once assigned, the "**Global Admin**" can press SYNC again and this time it will complete. Once done the trial licenses can be removed.

### No Users in Add User Dropdown

When trying to add users to the service in the Call2Teams admin portal, if the dropdown list is empty this is because there are no users or no new users with the "**Common Area Phone**" license or the "E5" license within the Office 365 environment.

Please assign the appropriate license to the user (within the Office 365 portal) and then get the "**Global Admin**" user to Sync again.