

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.

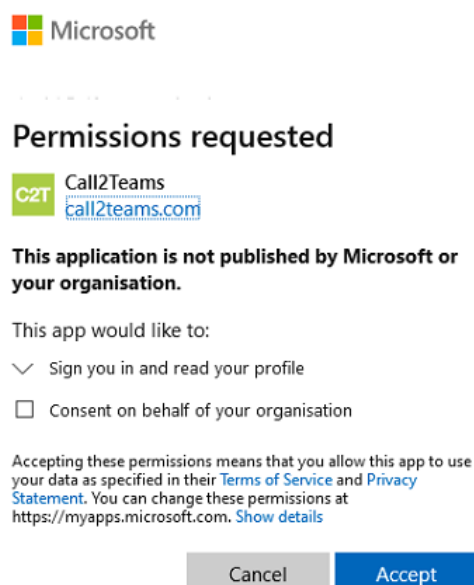
Call2Teams also requires 2 spare Office 365 licenses - please refer to the Troubleshooting section at the end of this document.

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 web interface. At the top, there is a navigation bar with 'Call2Teams' logo and menu items: 'Getting Started', 'Services', 'Users', and 'Account'. On the right, it says 'Reseller Account / Business Account' with icons for help, search, and user profile. The main content area is titled 'Services' and has two tabs: 'PBX' and 'Teams'. The 'Teams' tab is active. Below the tabs, there is a light blue box containing the following text: 'Setup of Office 365 works best if you have two spare licenses such as Business Essentials/Premium or E1/E3/E5. These spare licenses are only required for a few hours during the setup process and can be removed or re-assigned afterwards. If you only have one spare license then the set-up process also works but may take longer. If you don't have any spare licenses then additional manual activation steps will be required.' Below this text, there is a section for 'Office 365 Sync' with a checked checkbox for 'Enable Sync' and a note: 'After the service has been enabled we will start syncing data between this portal and Microsoft Office 365.' At the bottom of this section is a blue button labeled 'Enable Service'. Below the light blue box, there is a 'Documents' section with a list of links: 'Teams Admin Setup Guide (One-Click)', 'Teams User Setup Guide', 'Advanced Call Handling Scenarios', and 'Teams Troubleshooting Guide (One-Click)'.

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' page in the Call2Teams interface. The title 'Users' is on the left. On the right, there is a 'Syncing' status with a dropdown arrow. Below the title, it says '23 of 25 PBX user licences available.' In the center, there is a blue notification banner that reads 'Waiting for 2 domains to activate in Office 365 : 12:17'.

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

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.