MS Teams - Calling v2411

Introduction

With a standard landline, calls can only be answered when in the location of the line - usually within the office. With Teams, calls can be answered anywhere and can be transferred to any mobile number or landline.

Previously may have had one landline in your office meaning only one call could have been made at a time. Multiple calls can now happen simultaneously. Call queues will have been set up so callers will be held in a queue until someone is free, rather than being given the engaged tone.

Every Teams phone user has their own direct dial number assigned to them in the Teams system. It is best to keep this private to prevent others dialling you direct.

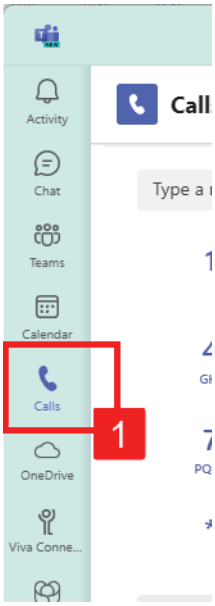
Some points to note:

All laptops have internal speakers. Ensure that the sound is unmuted on both the PC and in the VDI.
If you are using a set of headphones on the PC – remember that these have to be plugged in before you log into the VDI. Ensure that the sound is unmuted on both the PC and in the VDI.
If someone waits on the line until voicemail answers but doesn't leave a message – this will not show as a missed call.
You don't have to be logged in on the PC for your phone to ring.
Teams is aware of your diary entries. If you are showing "Busy" in your diary your phone will not ring. If everyone opts out of taking calls and has their diaries marked as busy the calls will go to voicemail. (See 'Problem Solving' section for more information).

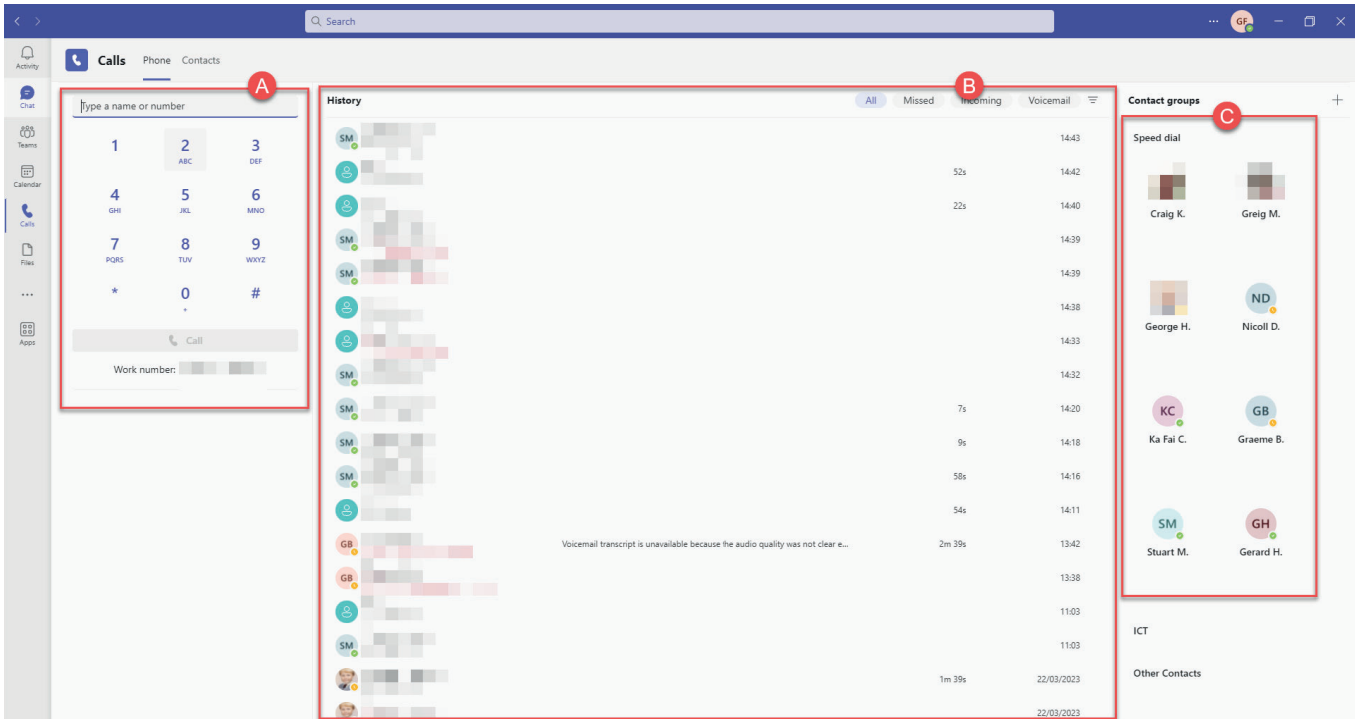
Calls - Call Tab

How do I view the ‘Calls’ section of Teams?

1. Click the ‘Calls’ tab.



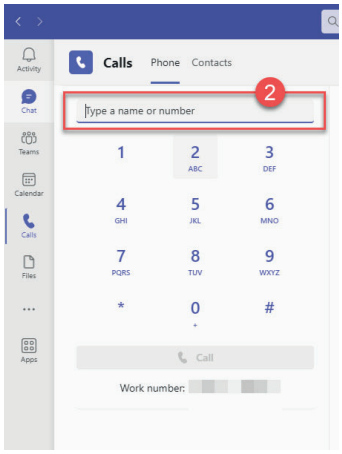
2. The ‘Calls’ window will be displayed, depending on the size of the window, this is likely to be split into three main sections.
   a. The number pad at the left hand side,
   b. the ‘History’ section showing missed, dialed and answered calls
   c. the right hand side any speed dials you’ve created.



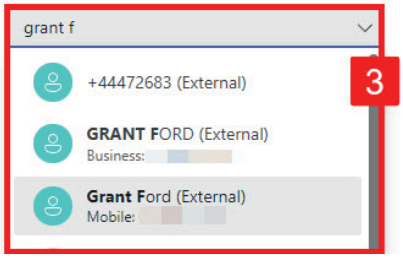
Calls - Making Calls

How do I make a call?

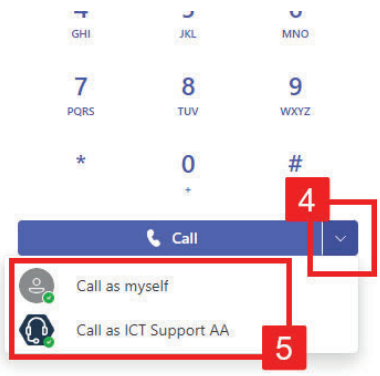
1. Click the 'Calls' tab.
2. Click in the 'search' box at the top of the screen.



3. Search for a Key/Lifestyles/ TAG user by typing their name in the search box and selecting it from the options shown.
   OR
   Type the phone number.

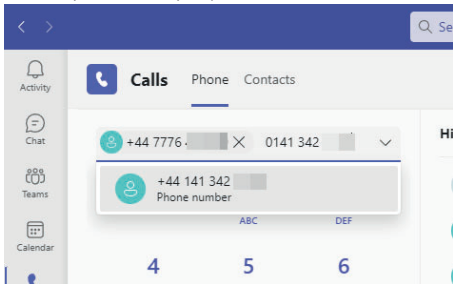


4. Click the 'Call' drop down menu.
5. Choose whether to call as yourself or as one of the groups you belong to.
   This affects the number that is shown to the person you are calling - your number or the group number. Use the group if you dont want them to get your direct number!



How do I make a group call?

1. Click the 'Calls' tab.
2. Click in the 'search' box at the top of the screen.
3. Type the name of the first user in the search box and select them from the options displayed.
   OR
   Type the number in the search box then click on the number in the drop down list to accept it.

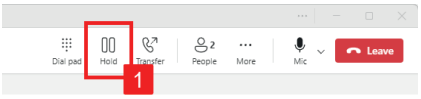


4. Repeat this step for any other users you wish to add to the call.
5. Click the 'Call' drop down menu.
6. Choose whether to call as yourself or as one of the groups you belong to.

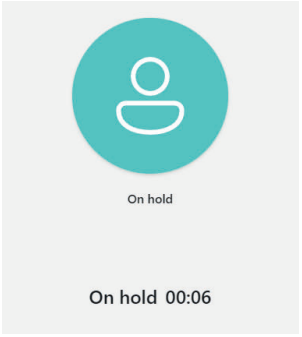
Calls - Hold

How do I put a call on ‘Hold’?

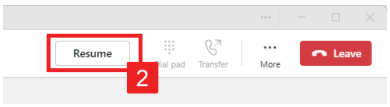
1. Click the ‘Hold’ button.



You will see on screen that the caller has been placed on hold.



2. Click ‘Resume’ to take back the call.

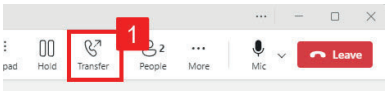


Calls - Transferring

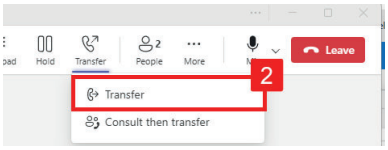
How do I transfer a call?

Method One:

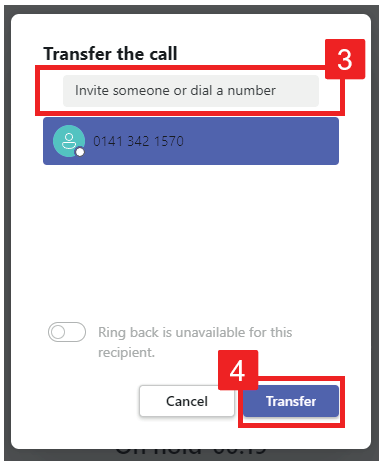
1. Click the 'Transfer' button in call window. The caller will be put on hold.



2. Click 'Transfer'.



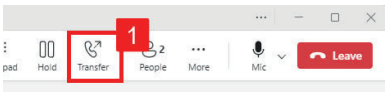
3. Enter the name of the person you wish to transfer the call to and select their name when its displayed.
   OR
   Type the phone number.
4. Click the 'Transfer' button.



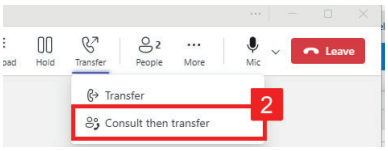
Method Two: Check-in before transfer

You may want to check in with the person before transferring a call to them.

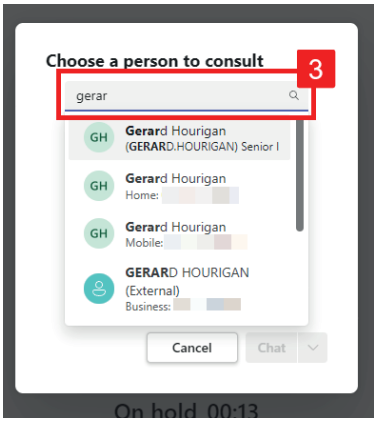
1. Click the 'Transfer' button in call window. The caller will be put on hold.



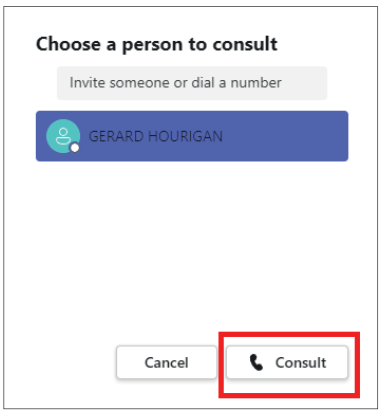
2. Click 'Consult then Transfer'.



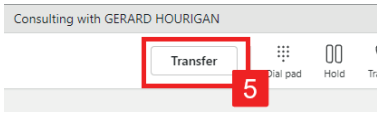
3. Enter the name of the person you wish to transfer the call to and select their name and the correct number if more than one is listed.
   OR
   Type the phone number.



4. Click 'Consult'.

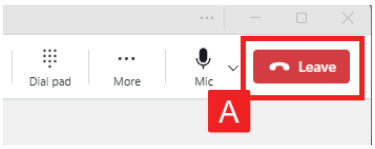


5. A new Teams call window will be displayed. If the person is happy to take the call click the 'Transfer' button.

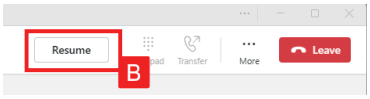


If they do not wish to take the call or don't answer:

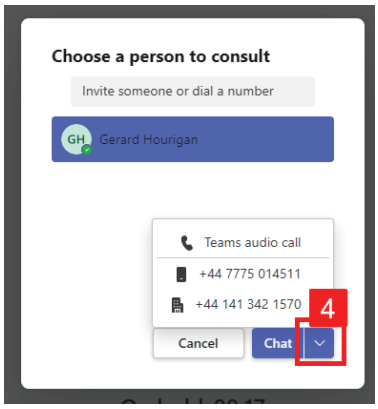
A. Click the 'Leave' button.



B. Then click 'Resume' to go back to the original caller.



NOTE:
If you choose a contact with more than one number 'attached' in step 3, click the arrow next to the chat button and choose the number to use.
Clicking the 'Chat' button will bring up a text chat window.



Calls - Voicemail

How do I check voicemail?

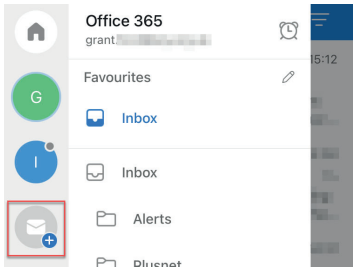
Most offices have voicemail redirected to a shared mailbox. These voicemails will be available within Outlook. On your PC, the shared mailbox will be added automatically. On your phone you will need to add this manually.

1. Open Outlook
2. Click the 'Voicemail Mailbox' below your personal email folders.
3. Click 'Inbox'.
4. A transcription of the voicemail will be included in the body of the message, an audio file will be attached to the email. Double click this file as normal to open.

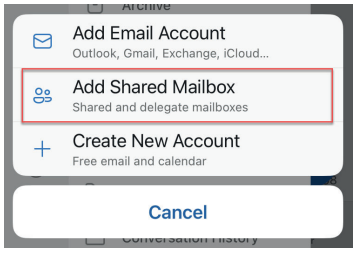
How do I add a shared mailbox?

1. With your mail on view, click the icon in the top left of the screen.

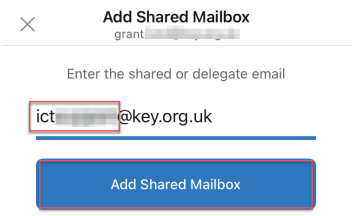
2. Click the 'Add Mailbox' button.



3. Click 'Add a shared mailbox'.



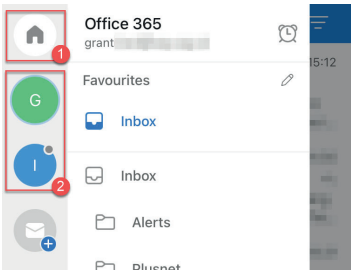
4. Type the email address of the mailbox.
5. Click 'Add Shared Mailbox'.



How do I view the shared mailbox?

1. With your mail on view, click the icon in the top left of the screen.

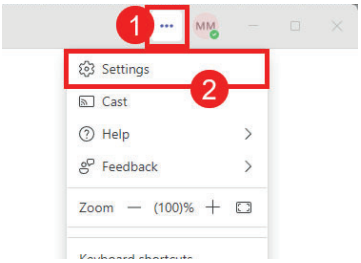
2. Click the 'Office' icon to view mail in all mailboxes in one list (1)
   OR
   Click the initial of the account you wish to view (2).



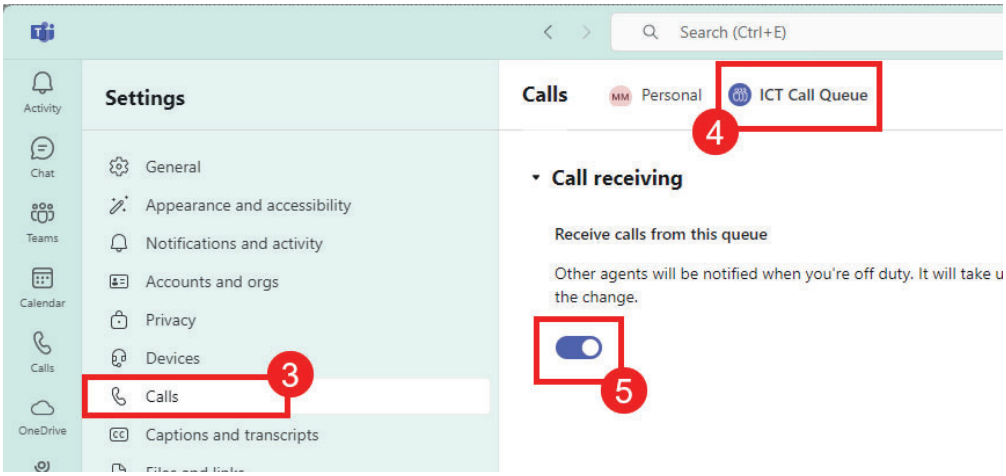
Opting In/Out of Calls - PC

How do I opt in/out of calls?

1. Click the '2 dots' in the top right hand corner of Teams next to your initials.
2. Click 'Settings'.



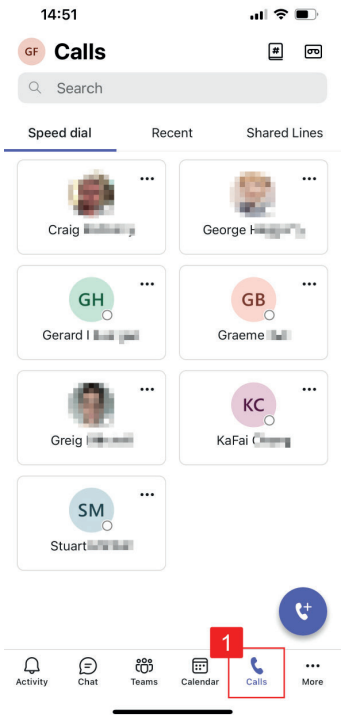
3. Click the 'Calls' button.
4. Click the appropriate Call Queue at the top of this window.
5. Click to toggle in/out of the call queue.



Making Calls - Phone App

How do I view the 'Calls' section of Teams?

1. Click the 'Calls' button. The default tab shown will be your 'Speed Dials'.



How do I make a call?

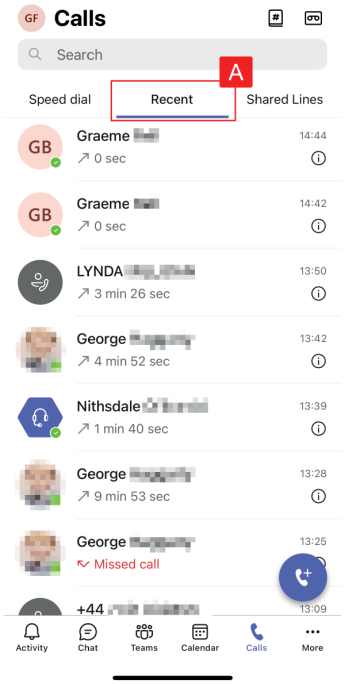
1. Click the 'Calls' button (see above).

Method One:

a. Click on a user in the 'Speed Dials' section to call them.

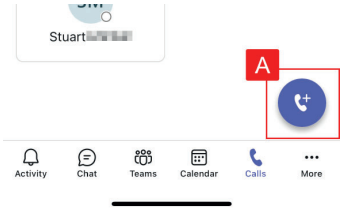
Method Two:

a. Click on 'Recent'
b. Click on an entry to call.



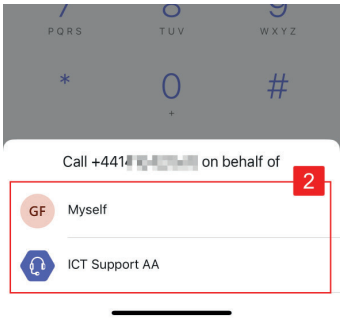
Method Three:

a. Click the 'Dial' button



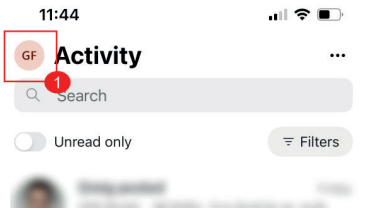
b. Dial a number.
c. Use the 'Search' bar at the top to search contacts.
d. Click the 'Dial' button.

2. Choose whether to call as yourself or as one of the groups you belong to.
Use the group number if you dont want the person you are calling to get your direct number!

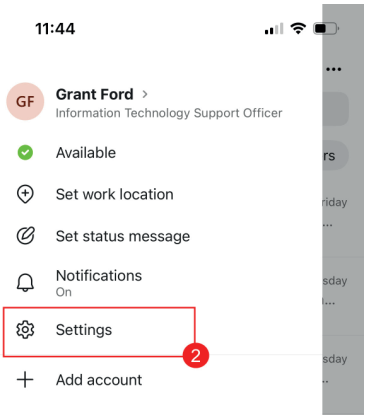


Opting In/Out of Calls - Phone App

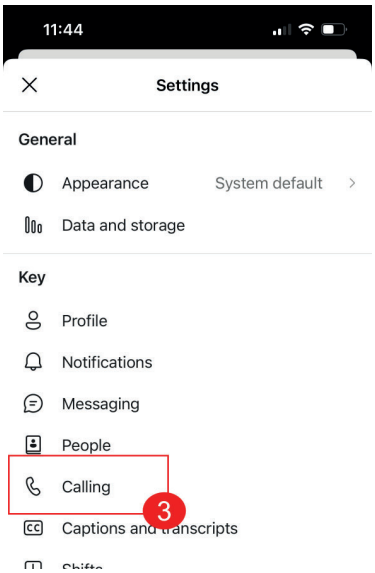
1. Click your initials in the top left hand corner of the screen.



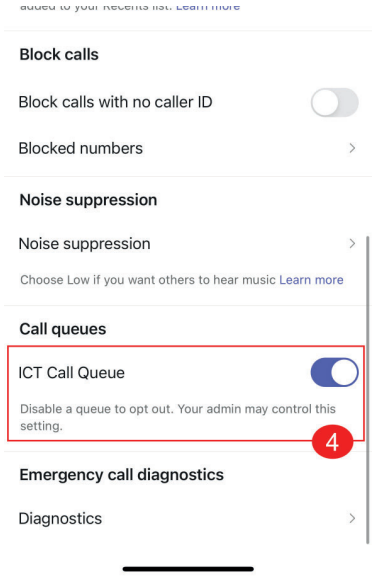
2. Click Settings.



3. Click Calling.



4. Scroll to the 'Call Queues' section and opt in/out.

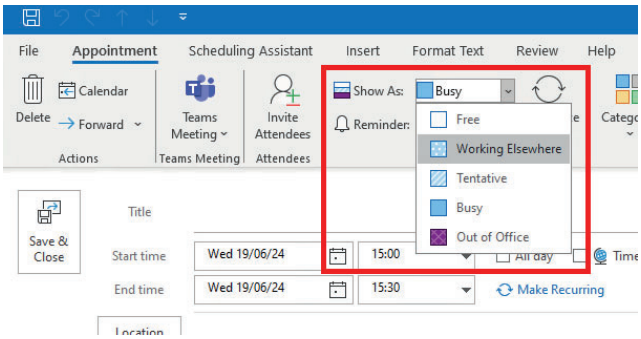


Problem Solving

Why isn't my phone ringing?

Teams is aware of entries in your calendar. If you are showing as busy or out the office in Outlook, Teams will not ring when calls are received.

When you are creating entries in your diary that may be more reminders than meetings, you might want to set your diary to show "Free".



If all diaries are showing that people are unavailable then no phones will ring and the caller will be directed to voicemail.

A quick way to check. If the entry shows you are 'Free' the calendar entry will be white at the left hand side.