



Customer Facing
Information Worker

Get started with Teams Phone

Streamline your day by
using Microsoft Teams
as your phone

Customer Facing Information Workers manage an array of daily tasks—and they need tools to help stay on top of them all. Fortunately, Microsoft Teams Phone can help simplify communication tasks and better manage work. Here's how to get started.

Initiate voice and video calls from the Teams App

Make **voice and video calls** to people within your organization or external Teams users.

Easily transition **to voice or video** calls from Teams Chat.

Add participants at any point in the conversation.

How to call another Teams user

- Select **Audio call** or **Video call** directly from a chat, OR
- Select **Calls** from the left menu in the Teams App, and choose or search for a contact

To add participants

- Select **Add people**

Call a phone number from the Teams App

Use the Teams desktop app to **call phone numbers** – that is, phone numbers outside your company.

Easily **save phone numbers as contacts**, then make a call by searching for your contact by name.

How to call a phone number

- Select **Calls** from the left menu in the Teams App
- Select **Dial a number**
- Dial any number on the keypad
- Select **Add contact** from your call history to save number to contact list

Accept inbound calls from the Teams App across any device (Laptop/Mobile/Desk Phone)

Use the Teams app to take **Inbound Calls** from a customer to your department or store.

Calls from an **IVR, Auto Attendant, or Call Queue** can be routed directly to the right associate, automatically.

Easily **triage and transfer calls** to the right person quickly within the Teams mobile app.

How to accept inbound calls




- Inbound **calls** activate the Teams client automatically
- Tap **Answer** to accept the call

Call park and retrieve

Easily **park a call and retrieve** the call from another device.

A representative parks a customer call and sends an announcement on a Teams channel for an expert to retrieve the call and help the customer. An expert enters the code in Teams clients to retrieve the call.

How to park and retrieve calls

- Click **More actions**  in your call window and select **Call park** 
- Teams will give you a unique code you can use to retrieve the call
- To retrieve a parked call, go to the speed dial tab, click **Unpark** , and enter the park code

Transfer calls to other team members

Forward a call to another team member.

Ensure a seamless call handoff to your manager by transferring with consult, which enables a pop-up chat before transferring a call.

Use hold to place a user on hold while addressing other tasks.

How to transfer a call with a consult

- When on a call, select the **More actions** menu
- Select **Transfer**, then choose **transfer now** or **Consult first**
- **Search** a team member and tap on them to **transfer** directly or **consult** first

Use the Teams App to call from your mobile device

On the go? Use the Teams App on your mobile device to receive and make phone calls to and from any number.

Easily **switch from your PC to your mobile device** by launching the Teams App on your phone—even during a call.

How to use your mobile device to make a Teams call

- Launch the Teams App on your mobile device
- For iPhone, tap the **Calls** icon
- For Android, tap the **More** icon and then select **Calls**

Get better ways to manage voicemail

Easily set up a voicemail message and add custom messages for **your store**.

Consolidate all your voicemail messages into Microsoft Teams with **cloud voicemail**.

See **voicemail transcriptions** next to recordings for easy scanning and to save time.

Retrieve voicemails in voice enabled Call Queues

Call log and voicemail is front and center in voice enabled channels.

How to view calls and voicemail in a Voice enabled channel

- From the **Teams Desktop App** select the channel for the call queue
- Select the **voice message** you want to listen to

Learn more

For more information about Teams Phone and its capabilities, please visit: [Microsoft Teams Phone | Voice and Video Calling](#)