Call2Teams®

Proof of Concept (PoC) Deployment walkthrough and PBX validation

Document Owner: Mark Herbert

Document Status: Production

Date: September 20

Version No: 2

Version	Purpose	Prepared By	QA Checked	Approved	Date
2.0	Update	Mark Herbert			15/9/20

Call2Teams®

Guidance for performing a Call2Teams Proof of Concept

This guidance note outlines the steps necessary to perform a basic Proof of Concept (PoC) of the Qunifi Call2Teams service on an existing PBX service.

Audience

The administration and configuration of the Call2Teams connector requires competence in:

- Administering Office 365
- Setting up SIP devices on a PBX

Pre-requisites

1. Watch the 9-minute video PBX setup video on the Call2Teams website:
   https://www.call2teams.com/webinars

2. An Office 365 account is needed: Take up the Office 365 E5 license trial if you don't have a sandbox or test account. You will need E1 licenses or better, with the Phone System add-on (an E5 license includes everything you need).

   The trial is available from https://go.microsoft.com/fwlink/?LinkID=723562

   If you are a Microsoft partner, Office 365 demo tenants are available from demo.microsoft.com, select "Microsoft 365 Enterprise Demo Content"

3. Ensure you have at least one, preferably two, unallocated Office 365 licenses, these are used by the setup process.

4. Move to the next tenant set-up phase

Call2*Teams*®

Tenant set-up

1. If you have not received a PoC account invitation, send an email to your Qunifi contact with an administrator's Office 365 UPN/username (email address) for us at Qunifi to grant you your Call2Teams portal access.

2. When you receive confirmation your account is active, use the link in the email to log in to https://admin.call2teams.com/ with your 'Global Admin' Office 365 credentials from your test tenant.

3. Create or shortlist at least two licensed test users in the Office 365 tenant that will be used for the PoC

4. Create at least two SIP accounts on your PBX, one for each user in the PoC

5. Complete the information table for the PoC users e.g.

User	Phone number	SIP Username	SIP Domain	SIP Password
Bob	+443300072675	VH4836902	Mypbx.com	Dhsgah6%gs
Mary	+17267265356	VH4836966	Mypbx.com	G5seeth6ye

6. Go through the process of setting up the Office 365 account and Call2Teams users as described in the **'Teams Admin Setup Guide'** in the Teams services area of the Call2Teams portal:

   ↓ Add PBX config

   ↓ Enable service in the Teams services tab

   ↓ Configure SIP credentials in the Call2Teams portal for users.

   ↓ Use the Sync Now function to update user information in Microsoft 365

7. Ensure you have created a Call2Teams user for each PoC user and enter the SIP credentials in the portal for each user from the table.

8. The PoC users should install the Teams client on PC or Mac (download from teams.microsoft.com and ensure they can log in.) The Teams web client can also be used.

9. Note: The Teams calls button should appear on the left in teams, **it can take a few hours** for O365 to sync the settings across.

Basic PoC confidence tests

Perform the following tests to check compatibility with your PBX for standard confidence levels:

1. Ensure there are at least 2 users registered from the same Call2Teams region

2. Test users can call out to the PSTN from Teams

3. Test users can call the extension number of other PBX users from Teams

Call2Teams®

4. Make calls into Teams users to their DDI from the PSTN

5. Make calls into Teams from the PSTN then have a user transfer the call back out to a PSTN number

Call2*Teams*®

Full interoperability tests

The following tests are recommended to ensure wide-ranging compatibility with PBX platforms. Some of these tests will not apply to all PBX platforms or are out of scope.

1. Basic call w/o ACR (Automatic Call Recording)

Feature	Detail Feature	Test Result	Operation
1. Internal Call	1.1.1. Make a call	y	1. Ext A calls Ext B. 2. Ext B answers the call. 3. Check the voice path.
	1.1.2. Receive a call	y	1. Ext B calls Ext A. 2. Ext A answers the call. 3. Check the voice path.
2. External call	1.2.1. Make a call	y	1. Ext A make an outbound trunk call to an external user B. 2. The external user B answers the call. 3. Check the voice path.
	1.2.2. Receive a call	y	1. An external user B calls to Ext A through trunk line. 2. Ext A answers the call. 3. Check the voice path.
3. Voice Mail	1.3.1. Message Retrieval 1.3.2. Message Delete 1.3.3. Set the greeting message 1.3.4. change password	y	1. Ext A calls the Voicemail Service number. 2. Ext A is prompted to enter mailbox number. 3. Ext A enters voicemail number(extension number) and '#'.
4. Auto Attendant	1.4.1. Auto Attendant	y	1. Ext A calls Auto Attendant Service Number. 2. Ext A hears Scenario Prompt. 3. Ext A dials digits according to the prompt. 4. Check whether the call is delivered to the next step or the destination.

2. Basic call w/ ACR

Feature	Detail Feature	Test Result	Operation
1. Internal Call	2.1.1. Make a call	y	1. Ext A(ACR) calls Ext B. 2. Ext B answers the call. 3. Exts hear the recording announcement. 3. Check the voice path.
	2.1.2. Receive a call	y	1. Ext B calls Ext A(ACR). 2. Ext A answers the call. 3. Exts hear the recording announcement. 4. Check the voice path.
2. External Call	2.2.1. Make a call	y	1. Ext A(ACR) make an outbound trunk call to an external user B. 2. The external user B answers the call. 3. The users hear the recording announcement. 4. Check the voice path.
	2.2.2. Receive a call	y	1. An external user B calls to Ext A(ACR) through trunk line. 2. Ext A answers the call. 3. The users hear the recording announcement. 4. Check the voice path.

3. Receiving call

Feature	Detail Feature	Test Result	Operation
1. MDN feature - Mobile extension	3.1.1. mobile extension	y	1. Ext B calls Ext A. 2. Ext A and Ext A's Mobile A are ringing at the same time. 3-1. Mobile A answers the call, the ring of Ext A is terminated. Or, 3-2. Ext A answers the call. the ring of Mobile A is terminated.
2. Allow Anonymous Call	3.2.1. allow anonymous call	y	1. An external user calls Ext A's DDI number without CID from outside. 2. The user hears an error tone. 3. The call ends.
3. Incoming call name & number display	3.3.1. incoming call name & number display	y	1. An external user calls Ext A's DDI number through trunk line. 2. Check that the number or name is displayed on Ext A's screen.

4. Call forward

1. Call Forward	4.1.1. Unconditional	y	1-1. Set up Call Forward from Ext A to Ext B.
	4.1.2. Busy	y	1-2. Ext C calls Ext A.
	4.1.3. No Answer	y	1-3-1. Unconditional : The call is always received at Ext B.
	4.1.4. Busy and No Answer	y	
	4.1.5. Call Forward Cancel	y	1. Cancel the Call Forward function of Ext A. 2. Ext C calls Ext A. 3. The call is received at Ext A.
2. Preset Call Forward	4.2.1. Preset call forward	y	1. Set up Preset Call Forward for Ext A. 2. Set the Day/Night Mode at Customer Manager > Company > Time Schedule. 3. Call Ext A from Ext B or trunk line for external cases. 4-1. Check Unconditinal destination at Day, Night or Timed mode. 4-2. Check Busy destination at Day, Night or Timed mode. 4-3. Check No Ans destination at Day, Night or Timed mode. 4-4. Check DND destination at Day, Night or Timed mode.

5 Call transfer

1. Blind Transfer	5.1.1. Internal Transfer	y	1. Ext A calls Ext B. 2. Ext B answers the call. 3. Ext A hold the Ext B. 4. Ext A calls Ext C. 5. Ext A hangs up. 6. Ext B hears ringback tone, Ext C is ringing. 7. Ext C answers the call. 8. Ext B and Ext C talk.
	5.1.2. Off-Net Transfer	y	1. Ext A calls Ext B. 2. Ext B answers the call. 3. Ext A hold the Ext B. 4. Ext A make an outbound trunk call to an external user C. 5. Ext A hangs up. 6. Ext B hears ringback tone, the external user C is ringing. 7. The external user C answers the call. 8. Ext B and the external user C talk.
2. Screened Transfer	5.2.1. Internal Transfer	x	1. Ext A calls Ext B. 2. Ext B answers the call. 3. Ext A hold the Ext B. 4. Ext A calls Ext C. 5. Ext C answers the call. 6. Ext A and Ext C talk. 7. Ext A hangs up. 8. Ext B and Ext C talk.
	5.2.2. Off-Net Transfer	x	1. Ext A calls Ext B. 2. Ext B answers the call. 3. Ext A hold the Ext B. 4. Ext A make an outbound trunk calls an external user C. 5. The external user C answers the call. 6. Ext A and the external user C talk. 7. Ext A hangs up. 8. Ext B and the external user C talk.

6 Supplementary service

1. Mute	6.1.1. mute	y	
2. CID Display	6.2.1. CID Display	y	1. An external user calls Ext A's DDI number via trunk line. 2. Check that the CID number is displayed on Ext A's screen. 3. If Present External Caller ID is None, the CID is displayed as anonymous.
3. Call Park	6.3.1. Call park	x	**1. Park a call** 1-1. Ext A calls Ext B. 1-2. Ext B answers the call. 1-3. During conversation, Ext A presses Hold + Dials feature code + bin number(000-999) 1-4. Ext B is held. 1-5. Ext A hears Confirm tone. **2. Retreive a parked call** 2-1. Ext A dials feature code + bin number(000-999). 2-2. The call is connected with parked Ext.
4. Hold	6.4.1. Hold	y	1. Ext A calls Ext B. 2. Ext B answers the call. 3. Ext A presses hold or trans button. 4. Ext B hears MOH.
5. MOH (Trunk)	6.5.1. MOH(Trunk)	y	1. An external user calls Ext A's DDI number via trunk line. 2. Ext A answers the call. 3. Ext A presses hold or trans button. 4. The external user hears MOH.
6. MOH (Extension)	6.6.1. MOH(Extension)	y	1. Ext A calls Ext B. 2. Ext B answers the call. 3. Ext A presses hold or trans button. 4. Ext B hears MOH.
7. Direct Call Pickup	6.7.1. Direct Call Pickup	x	1. Ext C calls Ext B. 2. Ext B is ringing. 3. Ext A dials {Call Pick-up (Direct)} feature code + Ext B number. 4. Ext A and Ext B talk to each other.
8. Group Call Pick Up	6.8.1. Group Call Pickup	x	1. Ext C calls Ext B(member of pickup group). 2. Ext B is ringing. 3. Ext A(member of pickup group) dials the {Call Pick-up (Group)} function code. 4. Ext A and Ext B talk to each other.
9. Conference Room	6.9.1. Conference Room Activate	y	1. Ext A dials {Conference Room Activate} feature code + conf-room number + '*' + (password-max 6digits) + '*' 2. Confirm tone is heard.
	6.9.2. Conference Room Attend	y	1. Ext A dials conf-room number + (password-max 6digits) + '*' 2. [Conf-room In] tone is heard.
	6.9.3. Conference Room Deactivate	y	1. Ext A dials {Conference Room Deactivate} feature code + conf-room number + '*' + (password-max 6digits) + '*' 2. Confirm tone is heard.
10. Extension Group	6.10.1. Hunt Number Group	y	1. Ext A dials Hunt Group Representative number 2. The group members are ringing. 3. Ext B(member) answers the call.
	6.10.2. Pick Up Group	x	1. Ext C calls Ext B(member of pickup group). 2. Ext B is ringing. 3. Ext A(member of pickup group) dials the {Call Pick-up (Group)} function code. 4. Ext A and Ext B talk to each other.
	6.10.3. Paging Group	x	Paging send only. 1. Ext A dials {Internal Page} feature code + Page Index(01~99) 2. The idle member of the paging group is automatically answered to listen to the broadcast on the speakerphone or receive the broadcast when the ring is answered.
11. Call Log	6.11.1. Call log	y	
12. Paging	6.12.1. Paging call	x	Paging send only. 1. Ext A dials {Internal Page} feature code + Page Index(01~99) 2. The idle member of the paging group is automatically answered to listen to the broadcast on the speakerphone or receive the broadcast when the ring is answered.
13. Call Recording	6.13.1. Call Recording by Answer (ACR)	y	1. Ext A(ACR) calls Ext B. 2. Ext B answers the call. 3. Call Recording is started automatically.
	6.13.2. Call Recording Stop	y	1. Ext A or Ext ends the call. 2. Call Recording is stopped automatically. 3. Check the list of Call Record Report on Customer Manager portal or Call Record Message on Customer User portal
15. Wake-up Call	6.15.1. Wake-up Register	x	1. Set Wake-up time for Ext A. 2. When the setting is completed, the clock icon is displayed on the Ext A's screen.
	6.15.2. Wake-up Cancel	x	1. Cancel Wake-up time 2. When the setting is completed, the clock icon disappears on the Ext A's screen.
	6.15.3. Wake-up Service	y	When it comes to the configured time, the wake-up alarm rings.
16. Timed Do Not Disturb (DND)	6.16.1. Timed DND	y	1. Set DND at Ext A 2. Ext B calls Ext A. 3. Ext B hears a error tone.
17. Caller ID Display Restrict(On/Off)	6.17.1. CID Display Restrict	y	1. Set "Customer Manager > User > User Setup > Outgoing Caller ID" for Ext A. 2. Ext A makes an outbound trunk call. 3. Allow Send CID : An external user displays Ext A's Outgoing Caller ID. 4. Restrict : An external user displays the number as Anonymous.

Adding a PBX template

If tests are successful, then a request can be submitted for a new template to be created in the Call2Teams portal with the PBX service fields pre-set, hidden, or locked.

Use the online form at

https://form.jotform.com/201506646645052

To submit trunk templates for adding to the portal.

Also please ensure your listing is up to date on our find-a-partner page by completing this listing form:

https://form.jotform.com/202416190722043

Documentation

For the convenience of customers and partners, a document can accompany the template to provide guidance on how to access the settings in the PBX to complete the portal configuration task.

Please provide a document to certification@call2teams.com in MS Word format and this will be attached.