Before You Begin
Before you begin the Teams admin setup you will need:

✔ A user/login to your Office 365 account with Global Admin rights
✔ Microsoft Phone System license add-ons (or E5 licenses) for the end users of the service
✔ Access to the PBX to create/manage SIP credentials.
✔ Ideally, one or two spare Office 365 user licenses such as Business Essentials/Premium or E1/E3/E5, for a few hours during the initial setup.

Overview
To enable the Teams Calling service the following steps are required:

● Gather SIP Credentials from the PBX
● Purchase and assign Microsoft Phone System (or E5) licenses
● Set up the PBX service
● Set up the Teams service
● Connect users to the PBX service.
Set up the PBX service

The set-up is split into two stages: **Services** and **Users**. Services are Customer-wide settings such as the set-up of the connection to the existing PBX and the set-up of the Office 365 tenant.

In the **8x8 Voice for Teams Portal**, select the **Services** tab. Choose the desired PBX from the list, or select ‘Custom’ if your PBX is not listed.

Enter the required information into the page. The information will be shown as will the option to add another PBX; an additional PBX entry would be used if you have more than one PBX.
Set up the Teams service

In the Services area, the Teams tab will allow the creation of the Teams configuration. The service automatically allocates endpoints based on the location of the PBXs or SIP trunks. The Enable Sync function allows the portal to automatically configure the service and set phone numbers directly into your Office 365 tenant.

Customers wishing to configure their tenant manually should untick the Enable Sync option. Information for manual config is available in section 0.

Setup of Office 365 works best if you have two spare licenses such as Business Essentials/Premium or E1/E3/E5. These spare licences 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.

At the point the service is enabled, the portal will request permission to make changes to the voice configuration in Office 365

A request to log-in and two separate permissions windows will appear.

IT IS IMPORTANT TO LOGIN WITH THE CREDENTIALS FOR THE OFFICE 365 ACCOUNT BEING SET-UP.

LOGGING IN WITH THE CREDENTIALS TO A DIFFERENT OFFICE 365 ACCOUNT WILL AUTHORIZE CHANGES TO AN OFFICE 365 TENANT OTHER THAN THE ONE THAT SHOULD BE CONFIGURED.
The user account used must have *Global Admin* rights to the Customer’s Office 365 tenant for the initial setup and any changes to regions, and at least *Skype for Business admin* rights for subsequent user provisioning.

There will be two or three pop ups requesting permission to enable the administration activities to configure the Office 365 account.

Part of the sync adds special domains to the Office 365 account and activates them for voice. This requires that a licensed user has their sign-in address changed to each of these domains in turn for long enough for Microsoft to activate that domain in the voice subsystem. The sync will do this automatically using the first of these three methods that applies:
1. Use a spare license to create a user, then delete the user when done.
2. Change the sign-in address of the user whose credentials were specified for the sync if it has an appropriate license, changing it back once done.
3. Change the sign-in address of an arbitrary user who has an appropriate license, changing it back once done.

NOTE: the sync will wait up to 20 minutes for Microsoft to activate the domain before giving up and restoring the sign-in address. In most cases this is more than enough times, but occasionally the Microsoft subsystem that activates domains for voice seems to stop working and it may be necessary to wait for a day before trying again.

When the initial configuration is complete, the Sync button with show a green checkmark.

![Sync button](image)

Note: the portal normally requires authorization to an Office 365 account just once, and this access authority is stored in Office 365. Access can be revoked at any time (see section 0 to revoke access if needed).

Occasionally through the configuration process, the Sync Now button will change to the blue button, this means that there are updates pending to be applied to the Office 365 tenant.

![Sync Now button](image)

Completing setup if there are no spare licenses
The sync will automatically detect if there are any spare licenses and will complete without any further steps.

However, if you do not have a spare license then it will prompt for manual intervention to complete activating the domains for voice. Section 0 shows this in more detail.

Create the Users in the service portal
Selecting the Users tab will display the list of configured users along with their Registration status.

![Users table](image)
There are some important features of the Add User function to note:
A list of users will be displayed that are applicable for PBX Voice calls that will have at least one of the following:

- A phone system license
- An E5 license

If a user has a phone number assigned in Office 365, this will show when the user is selected.

A phone number entered for a user will be pushed into the customer's Office 365 configuration by the next **Sync Now** activity.

Remember to start a Sync Now activity after updating users, the Sync Now button will show blue to alert that a sync is required.

**Editing Users**
In the user list, the user detail can be expanded using the small arrowhead next to the username:

![User List](image)

Click this element to expand the user detail:

![User Details](image)

At this stage the user information can be amended, or the user deleted. After changes to a user, a **Sync Now** activity is required.

This completes the set-up process.
Configuration delays
Some elements of the configuration within Microsoft Office365 can be subject to delays as information propagates between different parts of the Microsoft system. This can vary from day to day, so we recommend that you aim to carry out these steps at least 48 hours prior to your go-live date to allow for this. If you get an unexpected error on any step, then we suggest waiting 24 hours and trying again before reporting a problem to Microsoft.

Troubleshooting
If you encounter problems with these set-up steps for DNS or Teams dial-pad, please refer to the separate Troubleshooting guide in the Downloads area of the portal.