

SMS Connector Enterprise Set-Up Guide



TeamMate

Creating an Enterprise as a Reseller

As a Reseller you will start the process in the Service portal by inviting the Microsoft Enterprise who will be your business customer to build the connection.

Click Add Enterprise in the upper right-hand corner of the Enterprises page.

Add Enterprise

Enterprise Name* i <input type="text" value="Company Name"/>	Enterprise Admin Email ID* i <input type="text" value="globaladminteamsemail@msft.com"/>
User Limit i <input type="text"/> <i>(Leave the field blank to allow unlimited users)</i>	PBX Music On Hold i <input type="checkbox"/>
Billing Reference i <input type="text"/>	Access SIP Data i <input type="checkbox"/>
SBC Region i <input type="text"/>	Request Consent for Enterprise Management i <input type="checkbox"/>
	Services i <input type="text" value="x SMS"/>
	SMS Service Options Secure SMS i <input type="checkbox"/>

Submit

Enterprise Start Provisioning



The Global Administrator completes signup by selecting Complete in the invitation email and then logging in with Microsoft Enterprise Global Administrator credentials.

The invitation email will look similar to this image.

Enterprise Registration for Microsoft Teams - Phone System Connector

 TeamMate <no-reply@connecttoteams.com>
To: globaladminemail@msft.com

 Reply  Reply All  Forward  

Tue 1/9/2024 3:23 PM

 If there are problems with how this message is displayed, click here to view it in a web browser.

Dear TeamMate Connector Enterprise Admin,

Welcome to the Enterprise Provisioning Portal by TeamMate Connector Technology. Once you have completed this process you will be able to make and receive calls using your usual phone system from within Microsoft Teams using the Microsoft native dialpad.

There are a few steps to finalize your setup on the TeamMate Connector Connector.

- Use the link below to login to TeamMate Connector's Enterprise Provisioning Portal using your Microsoft Office 365 Global Administrator credentials. These credentials must be associated with a licensed (E1, E3, E5, Microsoft Business Voice) Microsoft Office user.
- Navigate to the 'Direct Routing Management' menu.
- Select a valid Domain Name in your Office 365 Tenant/Organization and input the Invitation Code included below.
- Next add in your PBX Settings and upload User information as instructed.

Invitation Code: **86b2Cf8f4Vb1481**

We will do our best to keep you informed during the provisioning process. Some processes are asynchronous - Microsoft takes time to propagate new Office settings. On these you will receive email notifications when things are ready.

You must use the COMPLETE button below to initiate use of the TeamMate Connector Connector

[Complete Registration](#)

Thank you,
TeamMate Connector

Helpful link: <https://docs.connecttoteams.com/en/articles/15-enterprise-start-provisioning>

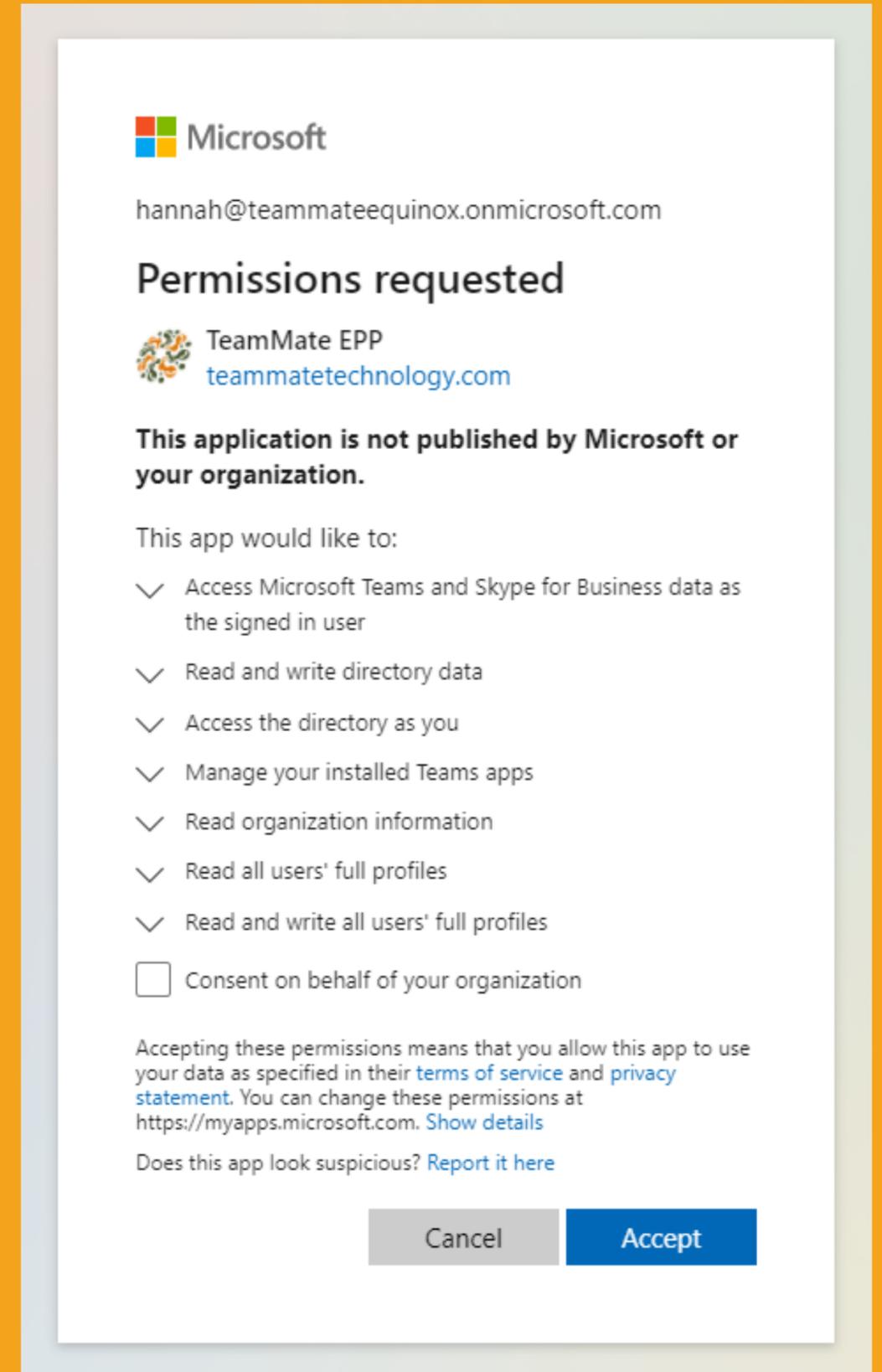


Granting Permissions

ConnecttoTeams performs certain limited tasks with the Microsoft Global Administrators' consent. These allow for automated provisioning via PowerShell of Direct Routing, User Calling activation and Teams Application setup in Microsoft.

The initial request when the Microsoft Enterprise Global Administrator is asked for permission looks like this:

The full set of Microsoft Permissions for the Enterprise Portal can be accessed [here](#).



User Group Sync



On the initial login to the Enterprise Portal, the enterprise Global Administrator will be redirected to the User Group Sync page and must select whether Users will be synchronized by specifying one or more Groups to serve as filters. If no Group(s) are selected, then all Users of the enterprise will be synchronized. If any Group(s) are selected, then only Users that belong to the Group(s) will be synchronized. The Portal WILL NOT synchronize or store Users that are not part of the selected Group(s).

The image below shows a case where two Microsoft Groups (Accounting and Billing) have been selected to be synchronized.

Manage Enterprise Groups for User Sync

- When no Group is selected, the Portal WILL SYNC all the Users from Azure AD.
- Selecting a Group here WILL LIMIT the User Sync to the Users of the Group.
- The Manage Users page will show Users that were previously synchronized before Group selection was chosen, however the synchronization will not happen and any updates made in Azure AD will not be reflected in the Portal

Enterprise Groups ⓘ

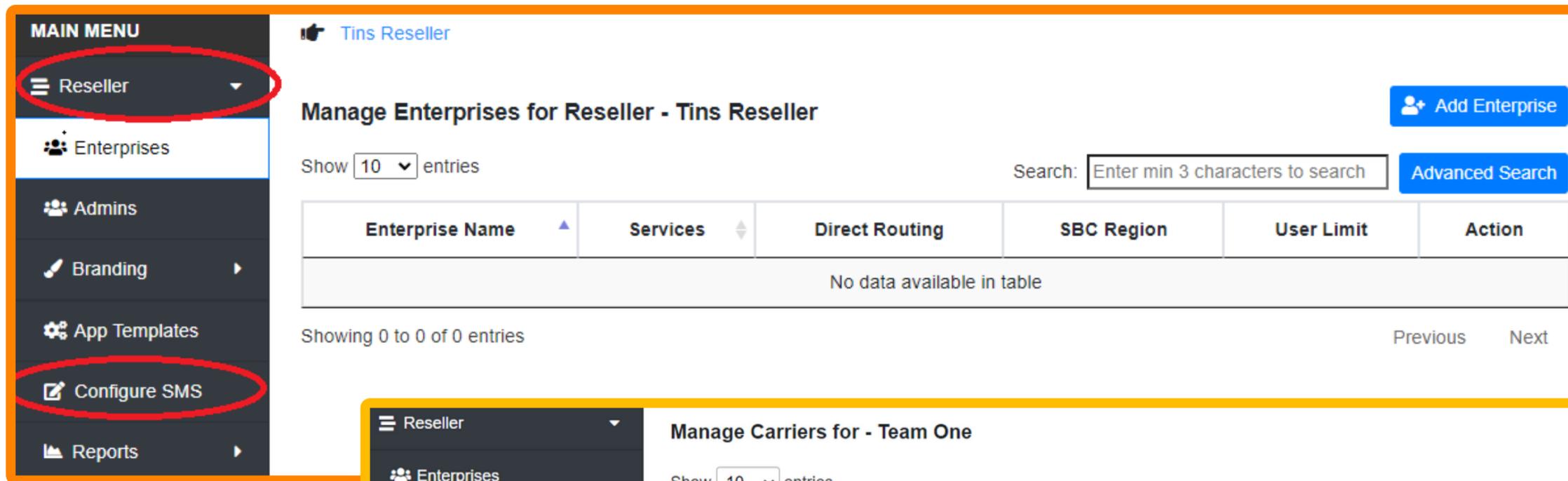
× Accounting × Billing

Update Sync Groups

Helpful link: <https://docs.connectoteams.com/en/articles/189-user-groups-sync>

Carrier Configuration as a Reseller Admin

Log in as a Reseller Admin. The Carriers can be defined from the left-side menu by clicking on Configure SMS. Depending on the choice of carrier, edit the required API parameters under action items.



MAIN MENU

- Reseller
- Enterprises
- Admins
- Branding
- App Templates
- Configure SMS
- Reports

Tins Reseller

Manage Enterprises for Reseller - Tins Reseller

Show 10 entries Search: [Advanced Search](#) [Add Enterprise](#)

Enterprise Name	Services	Direct Routing	SBC Region	User Limit	Action
No data available in table					

Showing 0 to 0 of 0 entries [Previous](#) [Next](#)



Reseller

Manage Carriers for - Team One

Show 10 entries Search:

Carrier Name	API Token	Action
Bandwidth		...
Twilio		Edit
Inteligent	N/A	...

Helpful link: <https://docs.connectteams.com/en/articles/152-sms-carrier-configuration-as-a-reseller-admin>



Save The App Template - Reseller

As a Reseller, you need to create a template for the Teams Application that will house the SMS interface. This template will set your default settings for any applications that are deployed to your enterprises. Save it first via the "App Template".

App Template Management

• Sets the Template for creating New Apps for New Enterprises

PBX App **SMS App** Call App

Version* 2.0.1

Dev Name* TeamMate Technology

Short Name* JunaidSMSEnt
(Short Name will be used as the Application Name in Teams)

Full Name* JunaidSMS

Short Description* App for SMS Management

Full Description* This app provides SMS Management Services for the Teams User.

Application Branding Icon - Large*
To change, [click here](#) to upload a new PNG Image

Application Branding Icon - Small*
To change, [click here](#) to upload a new PNG Image

Portal Single Sign On Tab Name* SMS Portal

Website URL* https://www.teammatetechnology.com

Privacy URL* https://www.teammatetechnology.com/privacy

Terms of Use URL* https://www.teammatetechnology.com/terms

Select Accent Color for Logo #60a18e

Configurable Tabs
× End User Portal × Chat × About

- Unselect and select the options in the Order you wish to see in the Teams Client
- About and Chat are mandatory tab elements in a Teams application, they will be added at the end if they are unselected.
- The ones marked in Red are Mandatory and will be required to be added and the tabs will be displayed in the default Teams client ordering.

Save SMS Application Template



Save The App Template - Reseller Cont...

You can customize the settings at the enterprise level via "App Management".

The screenshot shows the 'App Settings Management' interface for an 'SMS App'. The left sidebar contains a navigation menu with 'App Management' highlighted. The main content area is titled 'App Settings Management' and includes a sub-header: 'Sets the App settings for the specific App for the specific enterprise'. Below this, the 'SMS App' is selected. The settings are organized into two columns:

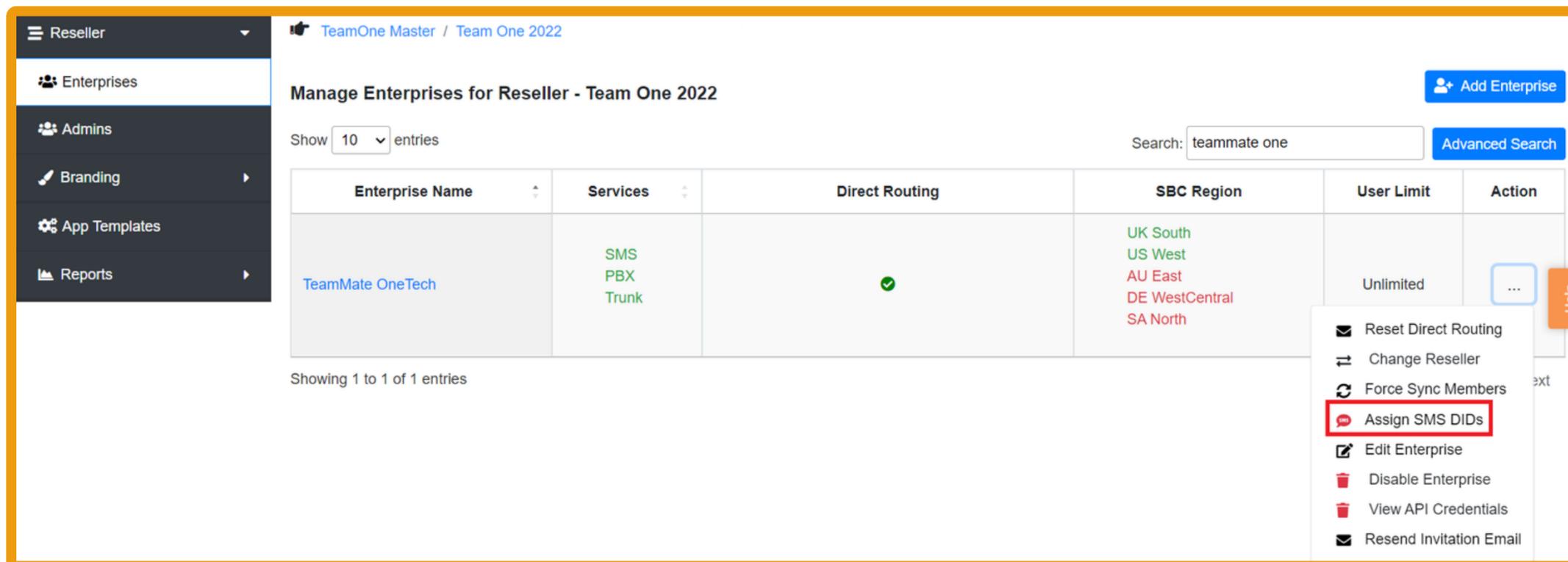
- Version***: 1.6.0
- Dev Name***: TeamMate Technology
- Short Name***: JunaidSMSEnt (Note: Short Name will be used as the Application Name in Teams)
- Full Name***: JunaidSMS
- Short Description***: App for SMS Management
- Full Description***: This app provides SMS Management Services for the Teams User.
- Application Branding Icon - Large*** and **Application Branding Icon - Small***: Both show a small icon and a link to upload a new PNG image.
- Portal Single Sign On Tab Name***: SMS Portal
- Website URL***: https://www.teammatetechnology.com
- Privacy URL***: https://www.teammatetechnology.com/privacy
- Terms of Use URL***: https://www.teammatetechnology.com/terms
- Select Accent Color for Logo**: #60a18e
- Configurable Tabs**: End User Portal, Chat, About

At the bottom, there are two buttons: 'Save SMS settings for JunaidSMSEnt Deployment' (blue) and 'Remove SMS settings for JunaidSMSEnt Deployment' (red).

Helpful link: <https://docs.connectoteams.com/en/articles/112-sms-enterprise-configuration>

Add SMS DIDs for Enterprise

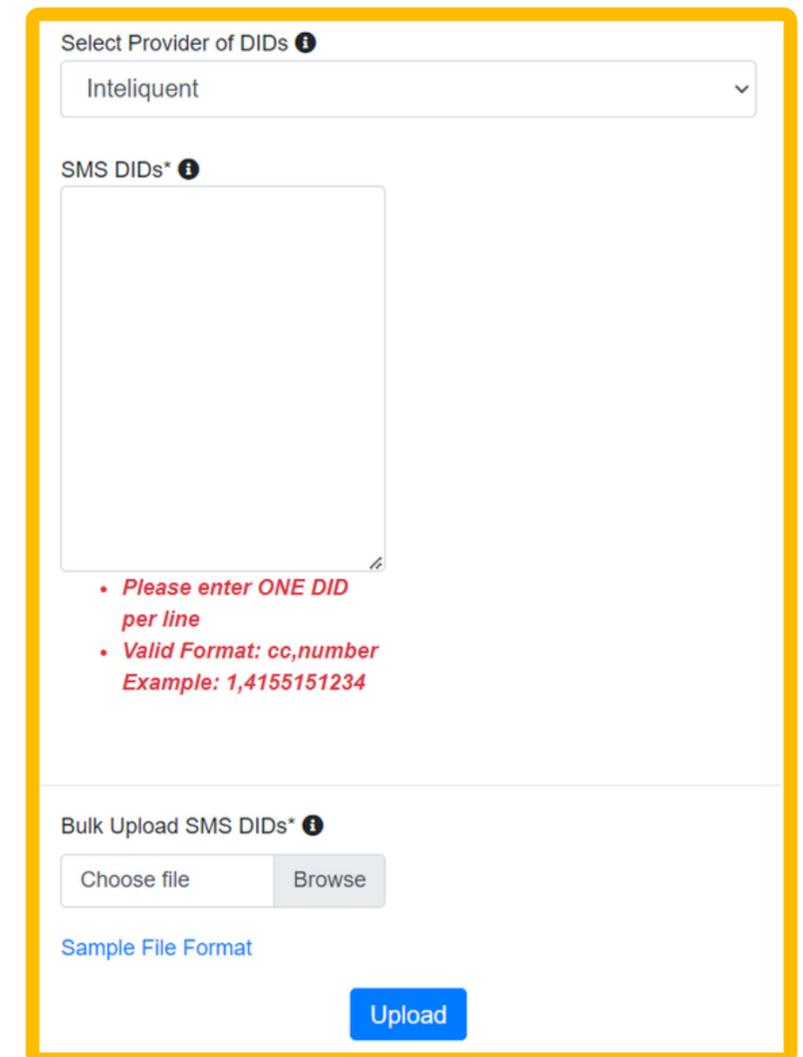
From the reseller dashboard, click the action icon. Select “assign SMS DIDs.” Select which carrier will be providing the DIDs from the dropdown. Use either the CSV file to do a bulk upload or use the freeform box to input the DIDs.



The screenshot shows the 'Manage Enterprises for Reseller - Team One 2022' page. The left sidebar contains navigation options: Reseller, Enterprises, Admins, Branding, App Templates, and Reports. The main content area shows a table with one entry for 'TeamMate OneTech'. The table columns are Enterprise Name, Services, Direct Routing, SBC Region, User Limit, and Action. The 'Action' column for 'TeamMate OneTech' has a dropdown menu open, with 'Assign SMS DIDs' highlighted. The 'SBC Region' dropdown is also visible, showing options: UK South, US West, AU East, DE WestCentral, and SA North.

Enterprise Name	Services	Direct Routing	SBC Region	User Limit	Action
TeamMate OneTech	SMS PBX Trunk	✓	UK South US West AU East DE WestCentral SA North	Unlimited	...

Helpful link: <https://docs.connectoteams.com/en/articles/112-sms-enterprise-configuration>



The screenshot shows the 'Assign SMS DIDs' configuration form. It includes a dropdown for 'Select Provider of DIDs' (Inteliquent), a text area for 'SMS DIDs', and a 'Bulk Upload SMS DIDs' section with a file upload button and an 'Upload' button. The 'SMS DIDs' text area has a red warning message: 'Please enter ONE DID per line' and 'Valid Format: cc,number Example: 1,4155151234'.

Select Provider of DIDs ⓘ
Inteliquent

SMS DIDs* ⓘ

- Please enter ONE DID per line
- Valid Format: cc,number Example: 1,4155151234

Bulk Upload SMS DIDs* ⓘ
Choose file Browse

[Sample File Format](#)

Upload

Configure an SMS User



1. From the "Users" page, click the Action icon next to the intended user. Click "Manage SMS."
2. Check the "Enable SMS Service" box.
3. Select "Basic User" from the dropdown.
4. Select the phone number to assign to the user, and use the blue arrow button to move it from the "unassigned" list to the "Assigned" list and click submit.

The screenshot shows the "Manage SMS Configuration" page for user kristin@teammate technology.com. The left sidebar is highlighted in orange, showing the "Users" menu item. The main content area is also highlighted in orange and contains the following elements:

- Enable SMS Service:** A checkbox that is checked, highlighted with a red box.
- User Type:** A dropdown menu set to "Basic User", highlighted with a red box.
- SMS DIDs:** Two columns: "Unassigned DIDs" and "Assigned DID(s)". Both show "1929" with a blue arrow button pointing from unassigned to assigned.
- Submit:** A blue button at the bottom right.

A context menu is open over the "Action" column of the user table, with "Manage SMS" highlighted in a red box. The table below shows the user details:

Teams User	PBX User	SBC Location	License Details	Action
kristin@teammate technology.com	6110@teammate.22881.service	US East 2	[Icons]	[Action Icon]

The screenshot shows the "Manage Users" page. The left sidebar is highlighted in orange, showing the "Users" menu item. The main content area is also highlighted in orange and contains the following elements:

- Manage Users:** Header with "Disable Users", "Export Users", and "Add User" buttons.
- Search:** A search bar and "Advanced User Search" button.
- User Table:** A table with columns: Teams User, PBX User, SBC Location, License Details, and Action. The "Users" menu item in the sidebar is highlighted with a red box.
- Context Menu:** A context menu is open over the "Action" column, with "Manage SMS" highlighted in a red box.

Helpful link: <https://docs.connecttoteams.com/en/articles/112-sms-enterprise-configuration>

Sync the SMS App

To finalize all changes, the Global admin should login and click the “Sync SMS App” button from the dashboard page.

Enterprise Admin Action Items

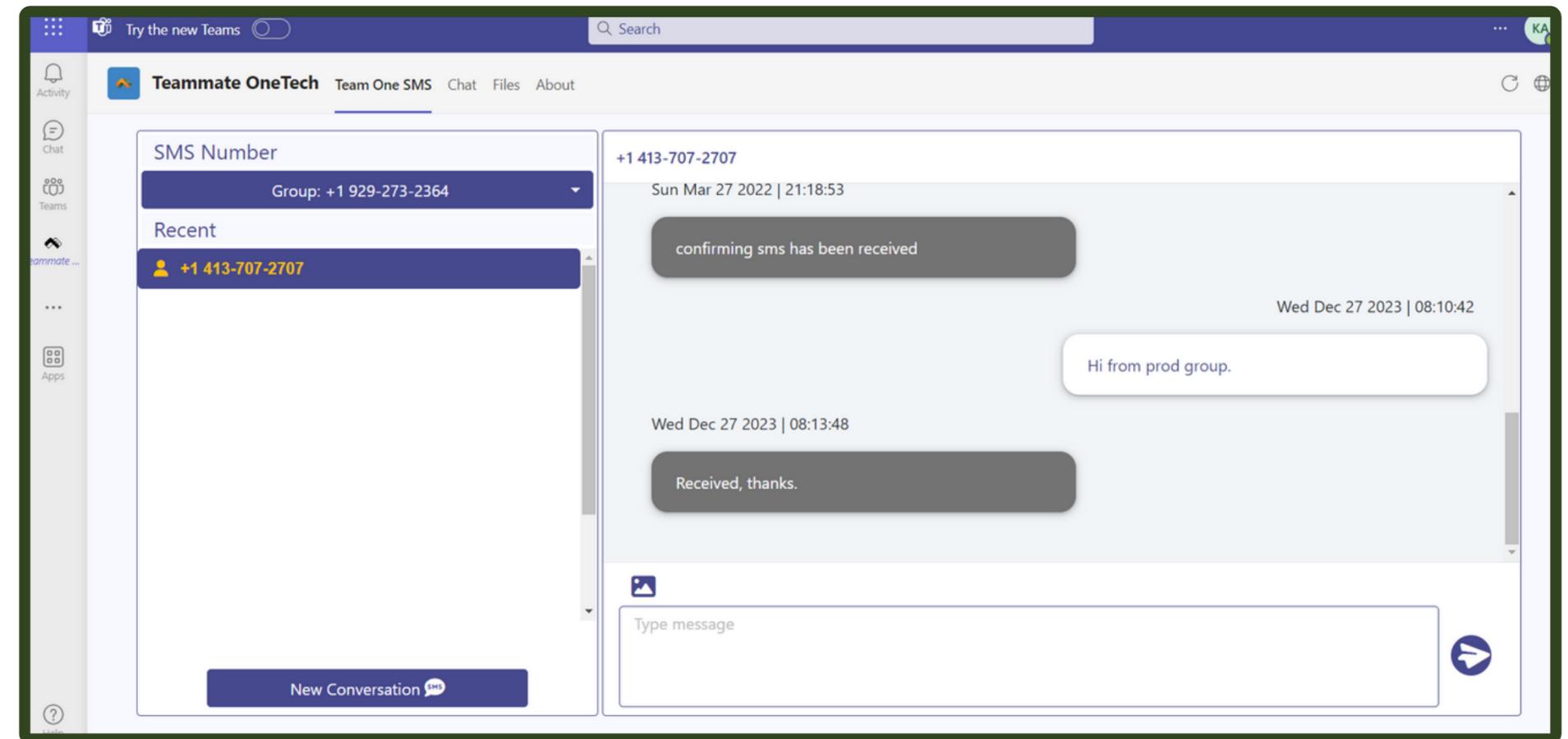
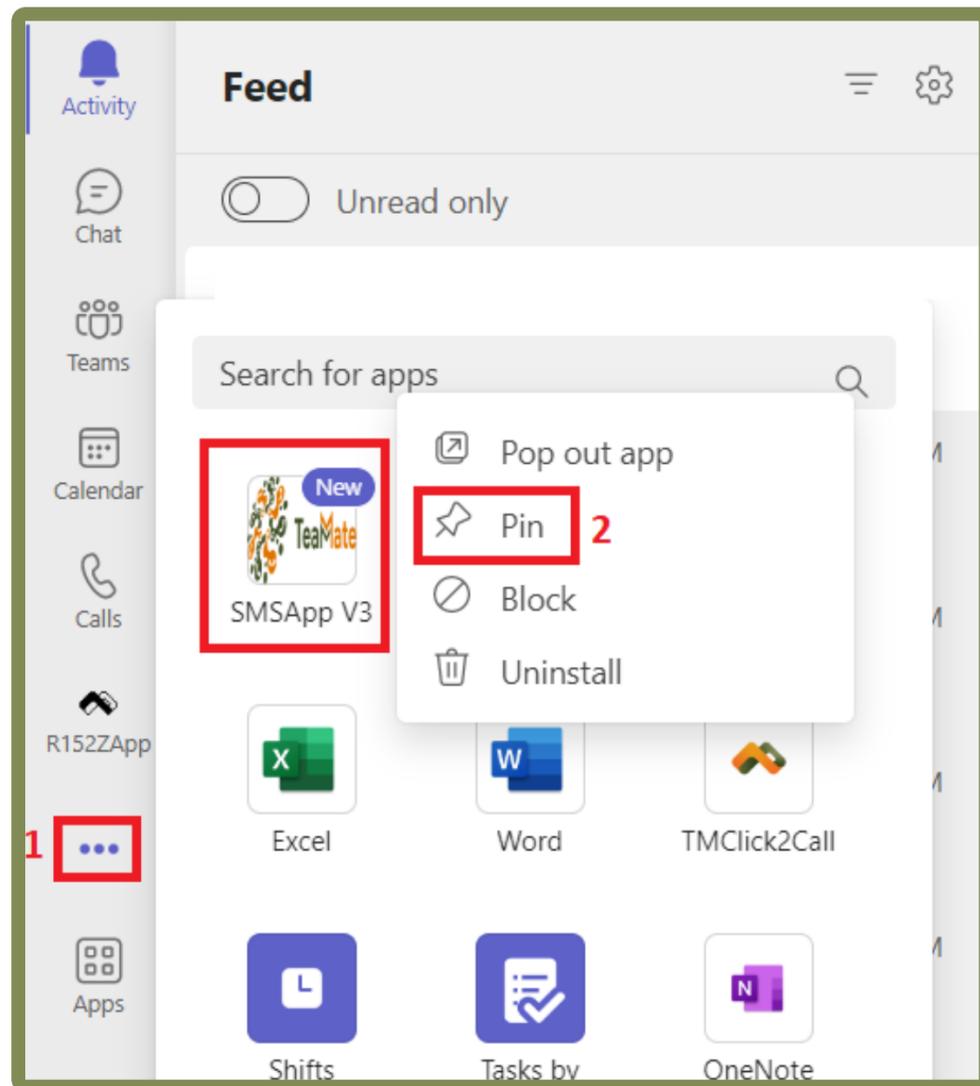
Setting	Current Status
 Teams SMS Application	Pending Synchronization

Action Required [Sync SMS App](#)

Helpful link: <https://docs.connecttoteams.com/en/articles/112-sms-enterprise-configuration>

End User Experience

A fully configured SMS user can send a message in various ways. It can be done via the SMS App.



Helpful link: <https://docs.connectteams.com/en/articles/172-how-to-send-sms-and-mms-from-the-application>



End User Experience

And by invoking the SMS Smart Composer by either pinning the widget or clicking the “Respond to Message” button.

