

In-Call Popup Details

Description of the TeamsPhone Plugin popup elements and functions during a call.

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Popup Anatomy

Regardless of the call scenario, the TeamsPhone Plugin popup uses the same basic structure.

TeamsPhone Plugin popup

Status indicator: a flashing green dot appears in the upper-left corner. It is only a visual element and is not synchronised with the real call status in Microsoft Teams.

Header: displays the matched record name and recognised phone number.

Quick Actions: expands the popup to show configured fields, linked records, and role-specific action buttons.

Minimise: reduces the popup to a small icon without losing its information.

Close: closes the popup after confirmation. Closing the popup does not end the Microsoft Teams call.

Popup Positioning

The complete popup can be dragged freely in both expanded and minimised mode. Click and hold the popup, then move it to any position on the screen so that it does not interfere with the operator's other activities during the call.