

Call Scenarios

At the same time, independently from the Teams notification, TeamsPhone Plugin searches the incoming number in the CRM.

- **Single result:** the matching CRM record is opened directly, without an intermediate selection page.
- **Multiple results:** the operator sees several cards containing the record name, matching phone number, and linked records. One card may be marked as **Recommended**, but the operator can select any result.

[Multiple call results](#)

- **No result:** an unknown-caller popup is displayed, with the option to search for the number online.

[Unknown caller popup](#)

If a **Create Record** quick action has been configured for the operator's role, a new CRM record can be created directly from the popup during the call.

Revision #1

Created 2026-07-28 14:03:48 UTC by Admin

Updated 2026-07-28 14:04:17 UTC by Admin