

How It Works

TeamsPhone Plugin works in three automatic stages:

1. **Call notification:** when a call arrives, Microsoft Teams proactively sends the notification to the CRM through a policy configured at company-tenant level in the Microsoft Teams administration.

[Microsoft Teams incoming call](#)

2. **CRM search:** after receiving the notification, TeamsPhone Plugin searches for the number in the configured module and can continue with linked searches in associated modules.
3. **Result display:** the plugin shows a single result, multiple result cards, or an unknown-caller popup.

[TeamsPhone Plugin popup](#)

The popup can be moved freely and minimised.

“ **Important: TeamsPhone Plugin is an integration, not a synchronisation.**

Microsoft Teams and vtenext remain independent. Answering or ending a call in Teams does not automatically close the popup, and closing the popup does not end the Teams call. The call must always be managed directly in Microsoft Teams.

Revision #2

Created 2026-07-28 13:52:13 UTC by Admin

Updated 2026-07-28 13:52:50 UTC by Admin