

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.

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