

Ascend for Teams Embedded Solution

Getting Started Guide



New to Ascend for Teams Embedded? Read this guide to learn the basics.

Collaborate in Teams

Collaborate in Microsoft Teams using the Chat, Meetings and File sharing tabs.

Chat

Use chat to instantly connect and stay engaged anywhere, anytime in real time

Meeting

Start, schedule, or view upcoming meetings

Files

Access, share, and manage files in real-time

Communicate in Ascend

All cloud communications are handled via the Ascend tab in the Teams desktop application.

Voicemails

Manage, playback, or view voicemail transcriptions

Dialpad / Calling

Access company directory at-a-glance, manage and place calls

Company Messaging

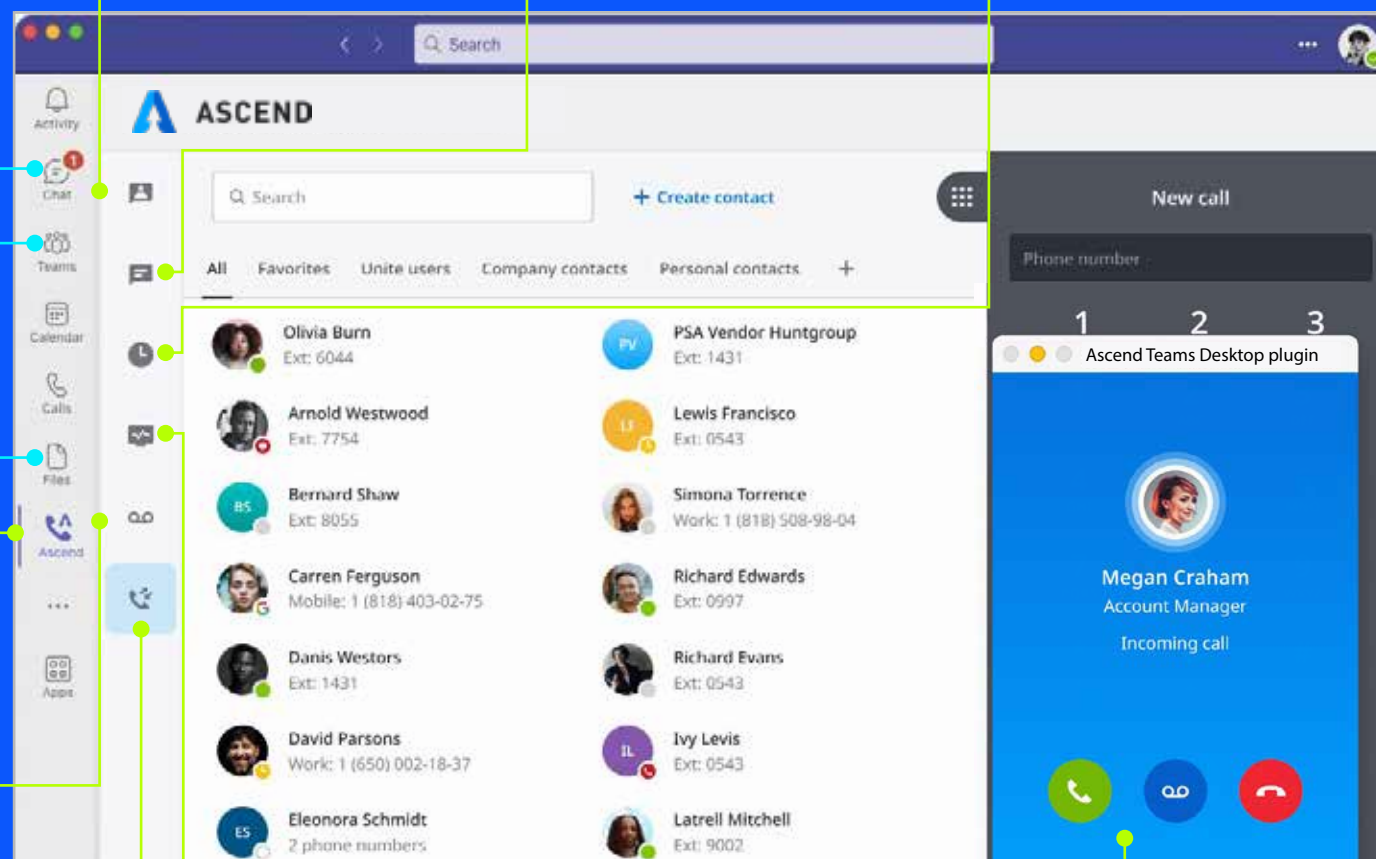
Use an assigned company phone number to receive and send SMS from that number

SMS

Use SMS for sending and receiving one personal message at a time between two users

Call History

View your call history including all call activity or missed calls



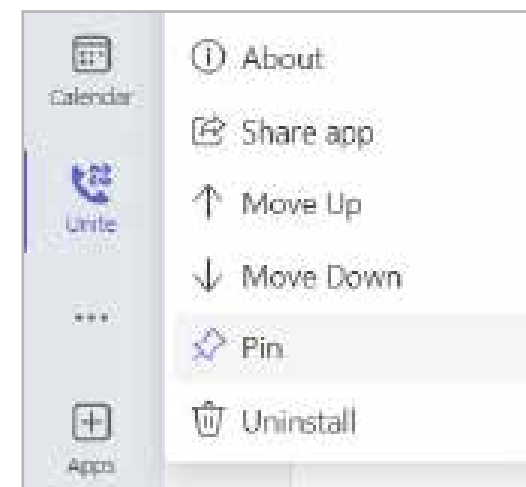
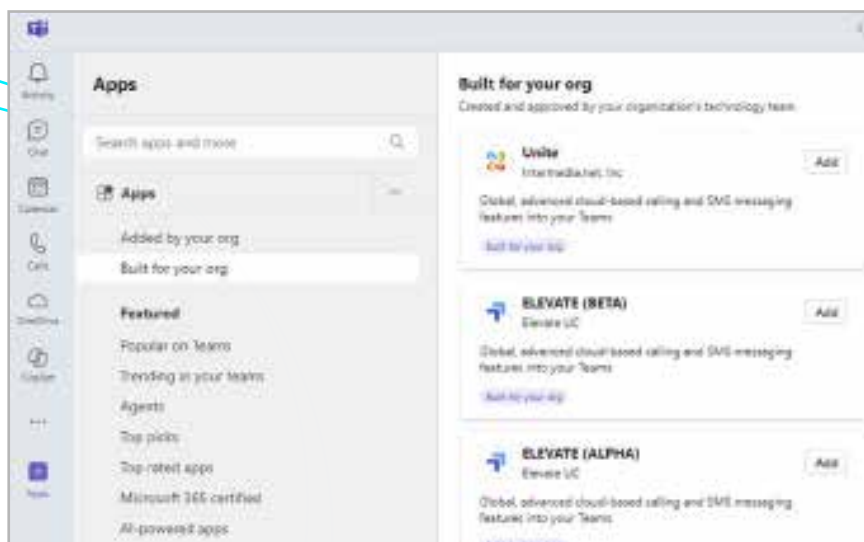
Install the Ascend for Teams Embedded Desktop App

Note: the Ascend Teams Embedded App can be automatically installed by an administrator, if this has happened these steps are not required.

STEP 1

Install and Pin the Ascend for Teams Embedded App

- 1 Login to the Microsoft Teams desktop app.
- 2 Select the **Apps** option in the sidebar and then select the **Built for Your Organization** category.
- 3 Locate the **Ascend app** and click on the **Add** button to add it to your installed Teams apps and then click on Open.
- 4 The Ascend for Teams Embedded App will appear in the MS Teams navigation bar. Right-click on it and select the Pin option – this will ensure the app is always visible.



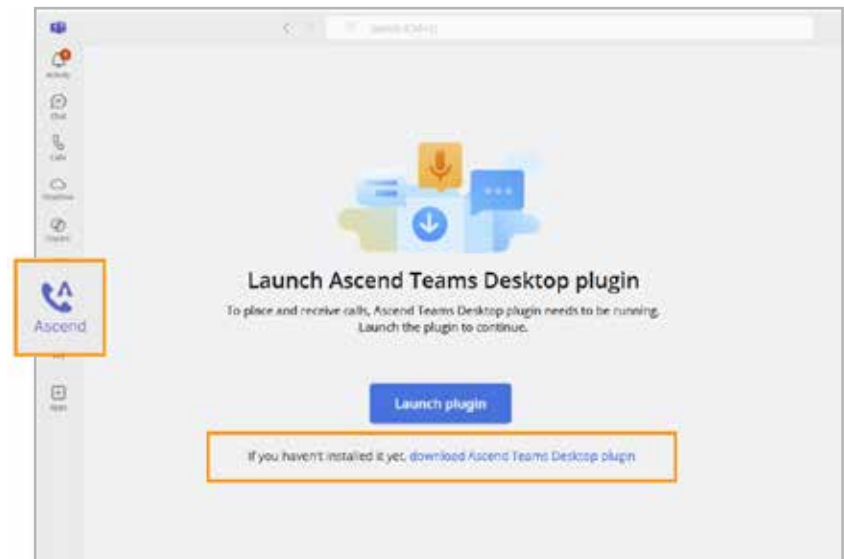
Install the Ascend for Teams Embedded Desktop App ctd.

The plugin enables calling from within the Microsoft Teams app. While Teams is used for collaboration (chat, meetings, file sharing), the Ascend desktop plugin connects the phone system to Teams, allowing you to place and manage business calls directly from the Ascend tab.

STEP 2

Install the Ascend for Teams Desktop Plugin and Log in to Your Account

- 1 When prompted, download the **Ascend for Teams Desktop Plugin** by clicking on the download link displayed on the screen.
- 2 Once downloaded, click **Open** and accept the license terms.
- 3 Select to install **Only for me** and click **Next**.
- 4 **Accept** the default location and click the **Install** button to continue.
- 5 Leave the checkbox ticked to run the Desktop Plugin and click the **Finish** button. The Ascend Teams Desktop Plugin application will start.
- 6 **Open** the Ascend App in MS Teams and sign in.



Important Notes: The Ascend login dialog opens in a separate window. When signed in, the Ascend Teams Desktop Plugin window will automatically minimize.

SMS for Ascend for Teams Embedded Desktop App

Sending SMS

SMS is a 1-1 communication that can be sent two different ways from the Desktop app.

From New SMS

Simply select the icon to create a New SMS. You can also choose an existing SMS chat which will have a grey SMS note on top.

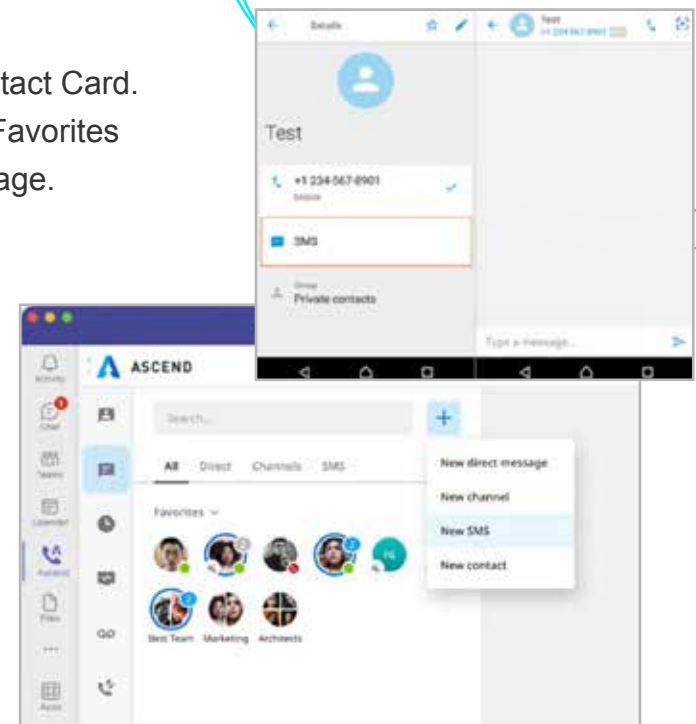
From a Contact Card

An option to send SMS is available in Contact Card. Search for a person or choose from your Favorites and select SMS to start writing your message.

Receiving SMS

Received SMS messages look almost like received chat messages. Once you receive a new SMS, it will pop up under the Chat section with a sign SMS next to it.

You will also receive a missed message from notification, just like you do with chat messages.

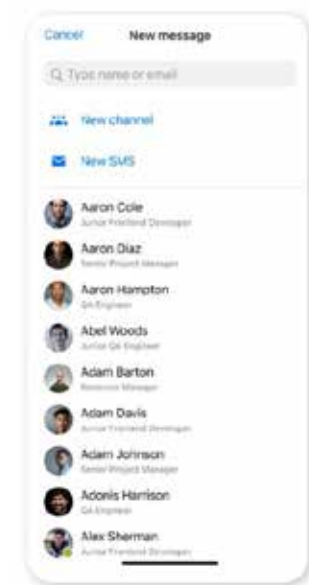


SMS for Ascend Mobile App

Sending SMS

Navigate to the New Message section. Choose New SMS and enter a 10-digit number or search contacts for the destination. All contacts having phone numbers outside your organization (private or corporate) will be displayed.

Then type the text and click Send icon. You can also choose an existing SMS chat which will have a grey SMS note on top.



Calling

Place, Receive and Manage Calls in Two Ways

1

Computer

Use computer speakers and microphone for calls (can use Bluetooth headset or headphones)

2

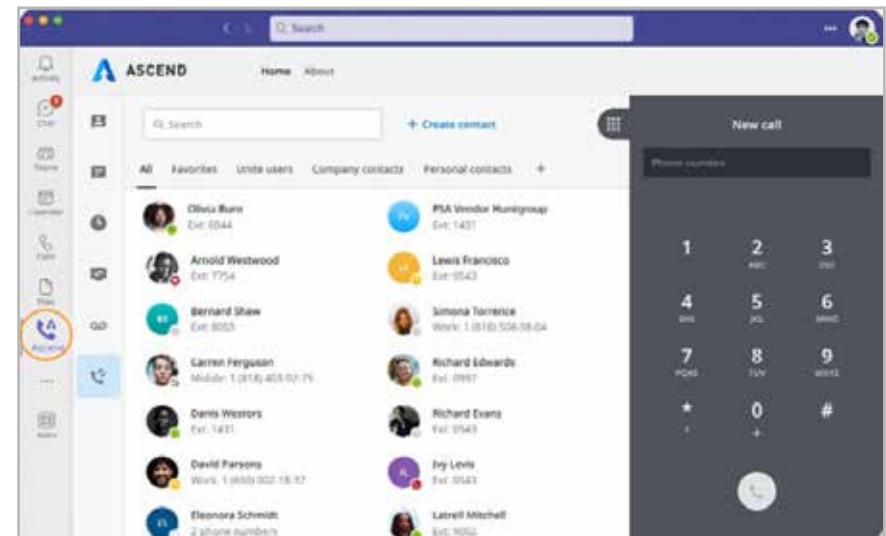
Deskphone

Use hardware (desk phone) or calls



Place Calls and View Contacts

Place calls to internal and external contacts, search and view company contacts at-a-glance, and switch between pre-defined filters to manage calls.



Calling Features Vary Based on Calling Mode

Feature / App Mode	Place A Call	Receive A Call	3-Way Calling	Mute / Unmute	Hold	DTMF	Call Flip	Call Park	Transfer	End Call
Computer	●	●	●	●	●	●	●	●	●	●
Desk-Phone	●	Desk-Phone		Desk-Phone	Desk-Phone	Desk-Phone	●	●	●	●

Ascend Mobile App

Take Your Work with You, Wherever You Go

Call and send/receive SMS from your mobile device with the Ascend mobile application.

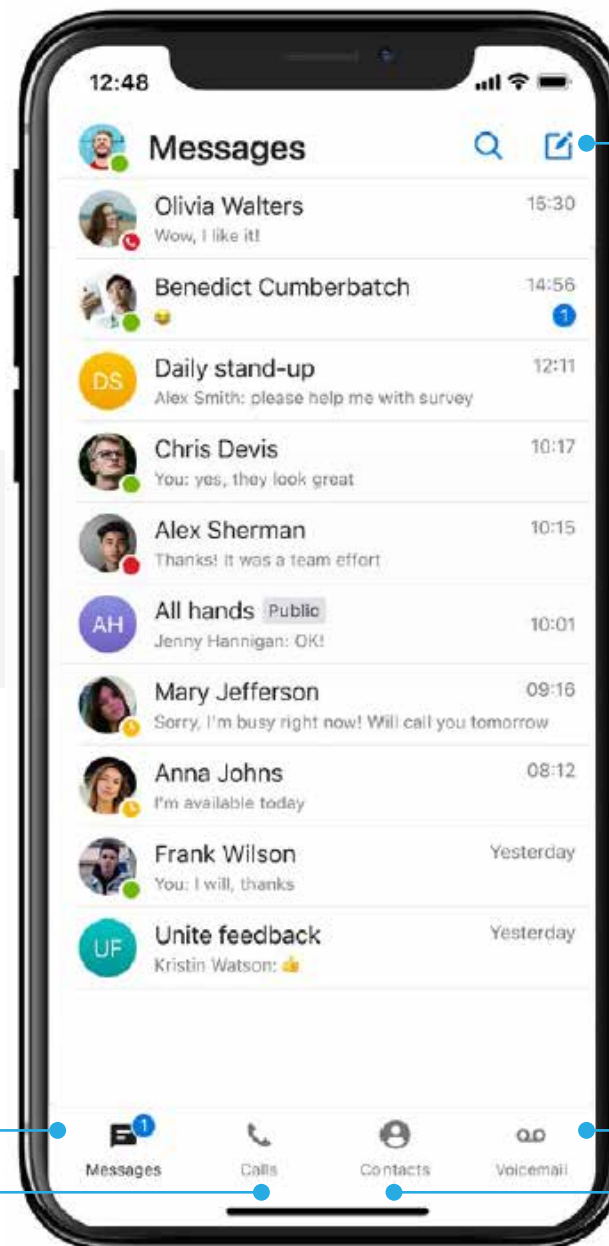
Get the Ascend Mobile App Here

Scan the QR code or download from the iOS or Android Store.



Contact Sync

Sync contacts from your personal device to your Ascend for Teams Embedded desktop and mobile applications.



Start New Messages

Create a new direct, channel or SMS message*

Messaging

Communicate in real-time with Direct and Channel messaging

Voicemail

Listen to and manage voicemails

Calls

Use your business phone number to place, receive and manage calls

Contacts

View all company and personal contacts

**Business SMS must be enabled by admin. Business SMS is only available in North America.*

Microsoft Teams Mobile App

The Ascend for Teams Embedded app brings key business calling features into the MS Teams mobile app without requiring a Teams Phone license.

Get the Microsoft Teams Mobile App Here

Scan the QR code or download from the iOS or Android Store.



App Requirements

Download and install both the Microsoft Teams mobile app and the Ascend mobile app on your device.

Important Exceptions:

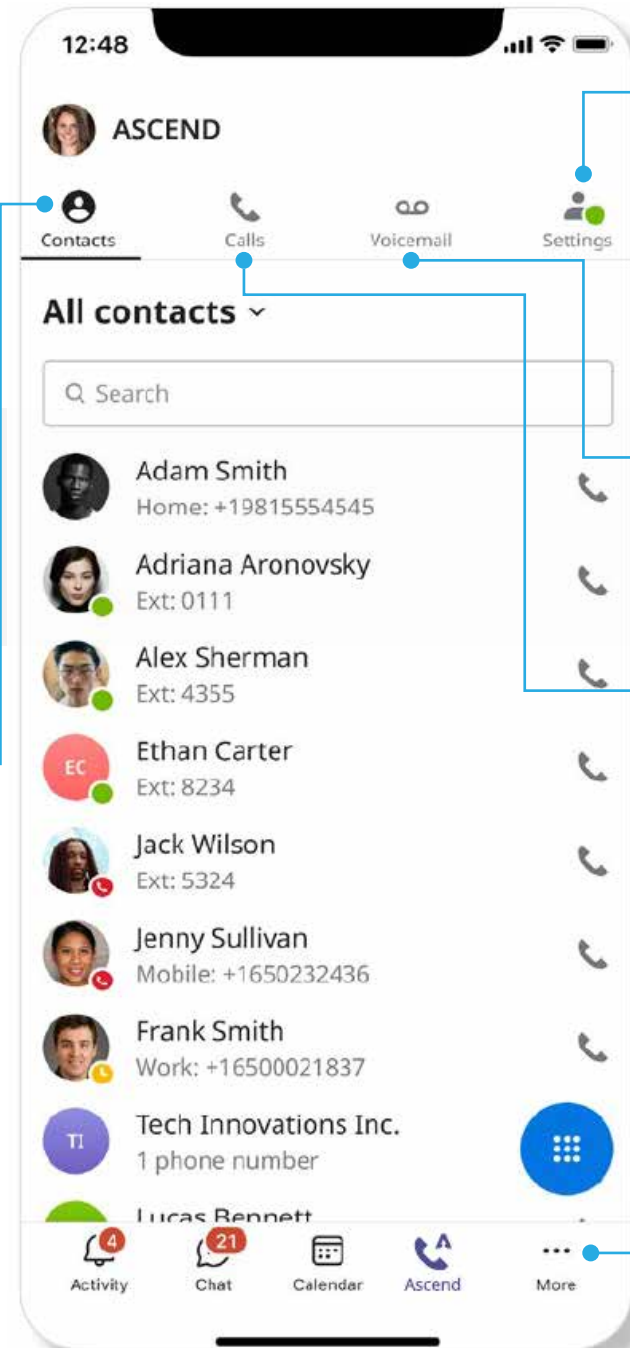
Chat, SMS, file sharing, meetings, Hunt Group, or Contact Center features are not supported.

All call notifications are managed through the Ascend Mobile app.

Contact and group creation/editing, phone sync, and primary number management are unavailable.

Contacts

Search and view business contacts or tap a contact to quickly place a call



Settings

Check app version, change user presence status, update language, send feedback, or log out from the app.

Voicemail

Listen to and manage voicemails

Calls

Use your business phone number to place and manage calls

ReOrder Ascend icon

Select the More... icon to reorder the Ascend app. This will ensure it appears on the home screen each time you open the Teams mobile app

**Business SMS must be enabled by admin. Business SMS is only available in North America.*

Installing the Ascend for Teams Embedded App Inside of the Microsoft Teams Mobile App

Install the Ascend Embedded app in MS Teams and Log in to Your Account

- 1 Open the Teams mobile app, and navigate to the **More...** tab in the bottom right of the home screen.

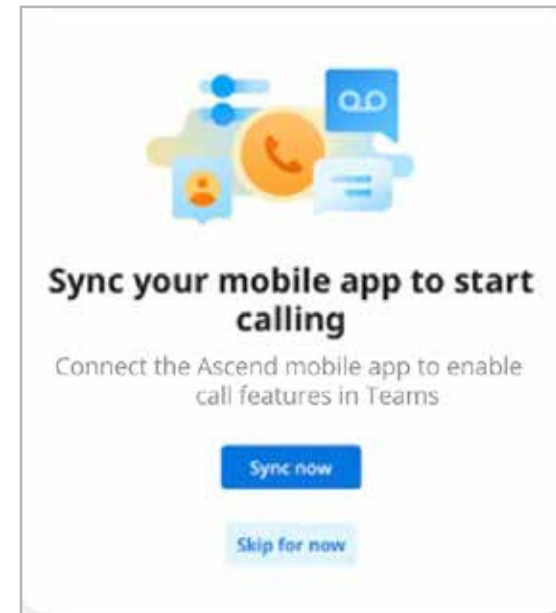


- 2 Find the Ascend app from the app list and launch it. You may be prompted to sign in.



- 3 **Log in** to the Ascend Teams mobile app with your credentials.

- 4 You will be prompted on the next screen to either **download** the Ascend mobile app or **Skip** to continue if this app is already installed.



- 5 Tap **Sync now** to complete a one-time synchronization with the Ascend mobile app. The screen may flicker briefly.

- 6 After a successful sync, you will return to the Teams app and all calling features will be available.

How Calling Works in the Teams Mobile App

Outgoing calls initiated from the Teams mobile app will automatically redirect you to the Ascend mobile app, where the call is placed.

After the call ends, you will be automatically returned to Teams.

All incoming calls and missed call notifications will appear in the Ascend mobile app, not in Teams.

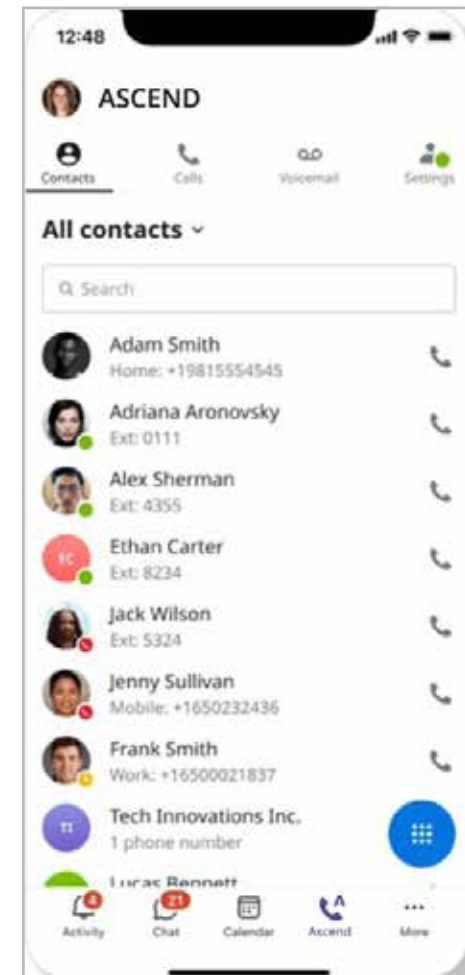
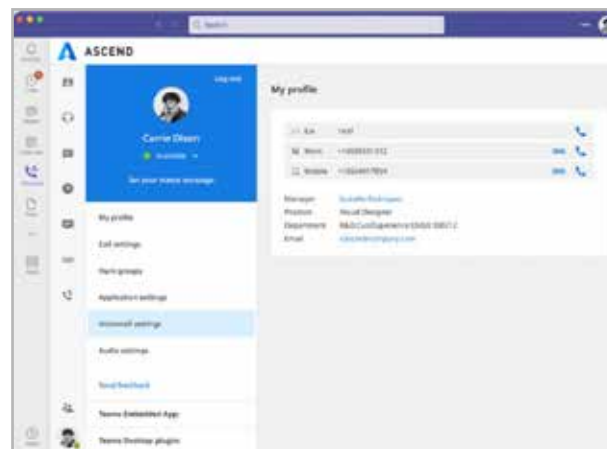
Next Steps

Send Us Your Feedback:

Are you enjoying Ascend for Teams Embedded solution?

Is there room for improvement?

Let us know!



+ Questions? Contact Us Today!