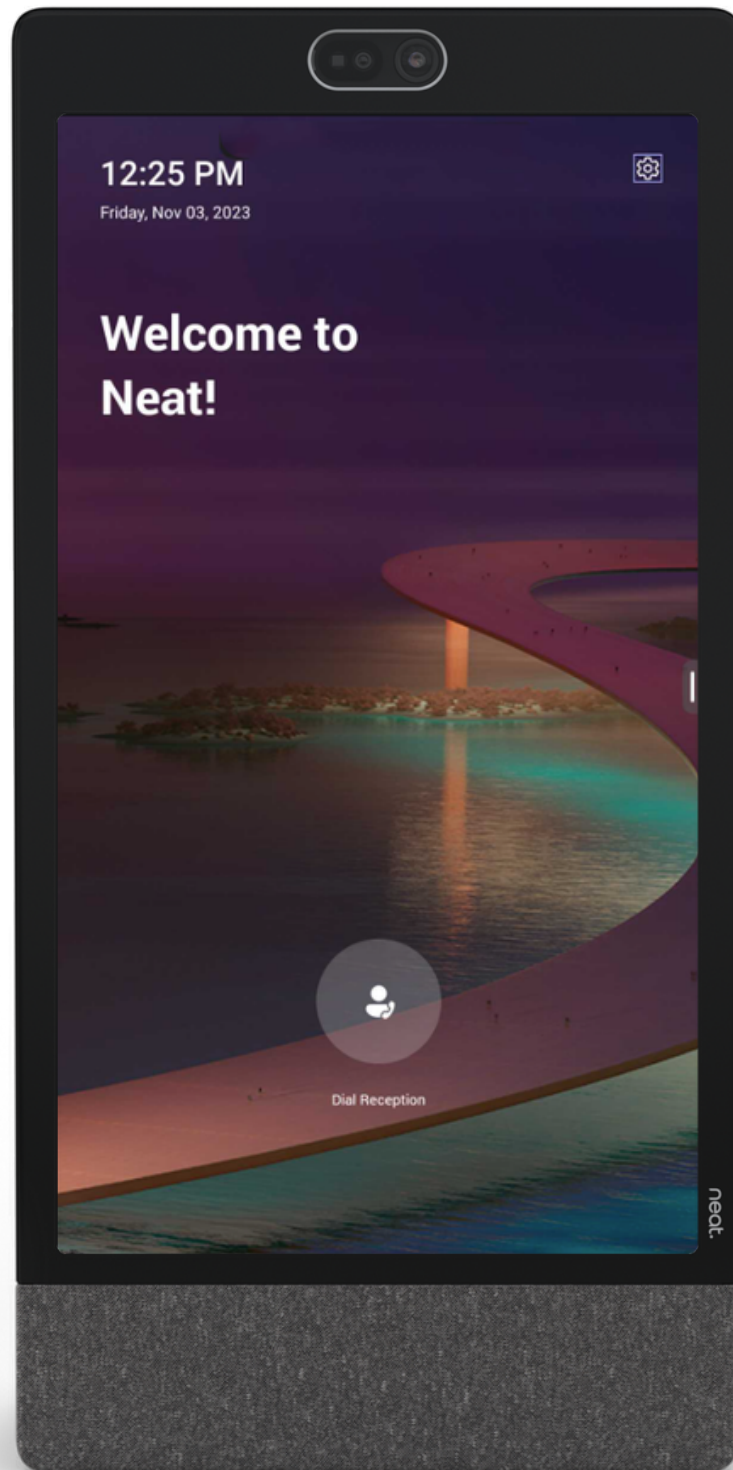


Neat Frame

Virtual Front Desk guide for Microsoft Teams



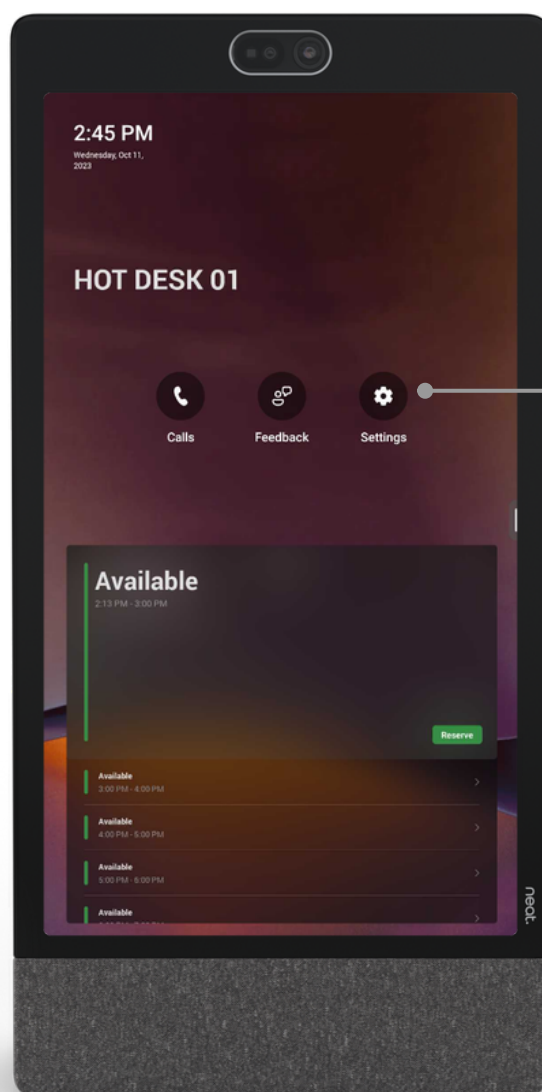
Updated November 2023

Virtual Front Desk

Virtual Front Desk (VFD) is a feature on Teams Display devices that enables the device to act as a virtual receptionist. VFD allows professionals to streamline reception operations. Greet and engage with clients, customers, or patients whether on-site or remote. Increase productivity, save costs, and create a lasting first impression. Please note, you need a Microsoft Teams Shared Device license to use VFD.

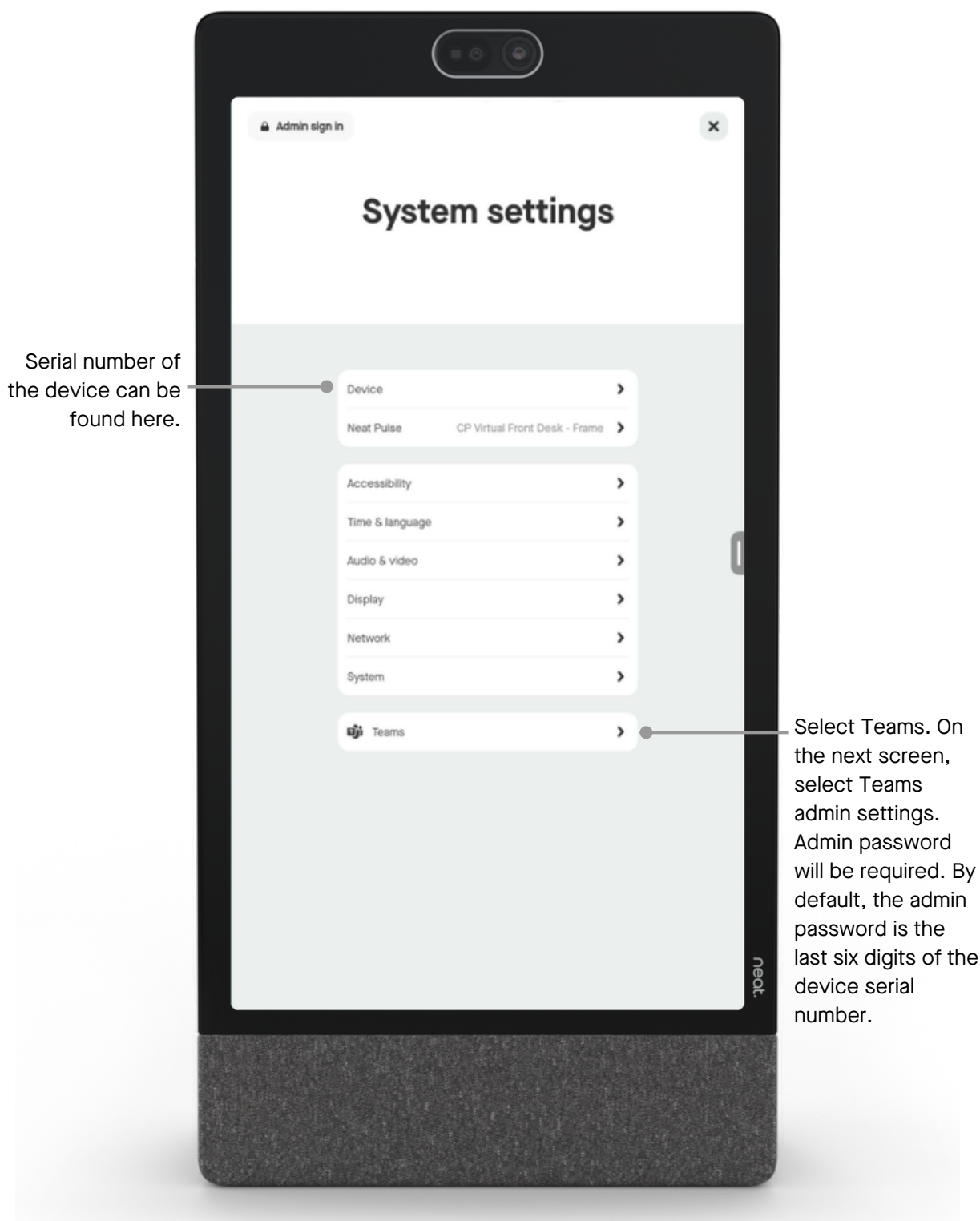
Setup of Virtual Front Desk

When you login to Neat Frame with an account that has the Microsoft Teams Shared license assigned, Frame will default to the Teams hot desk interface. To change the UI to Teams Virtual Front Desk, follow the steps below.



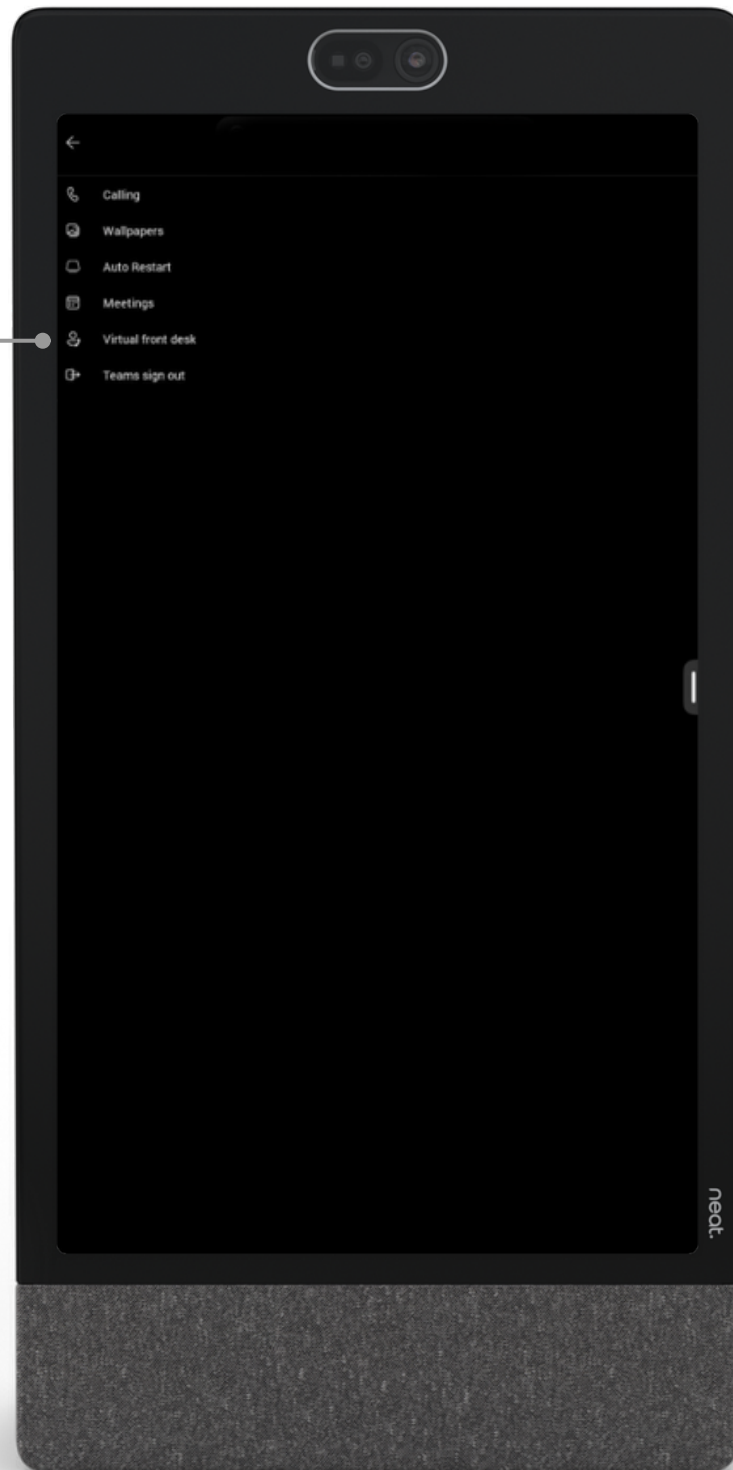
Click into Settings and then select Device Settings.

Setup Virtual Front Desk

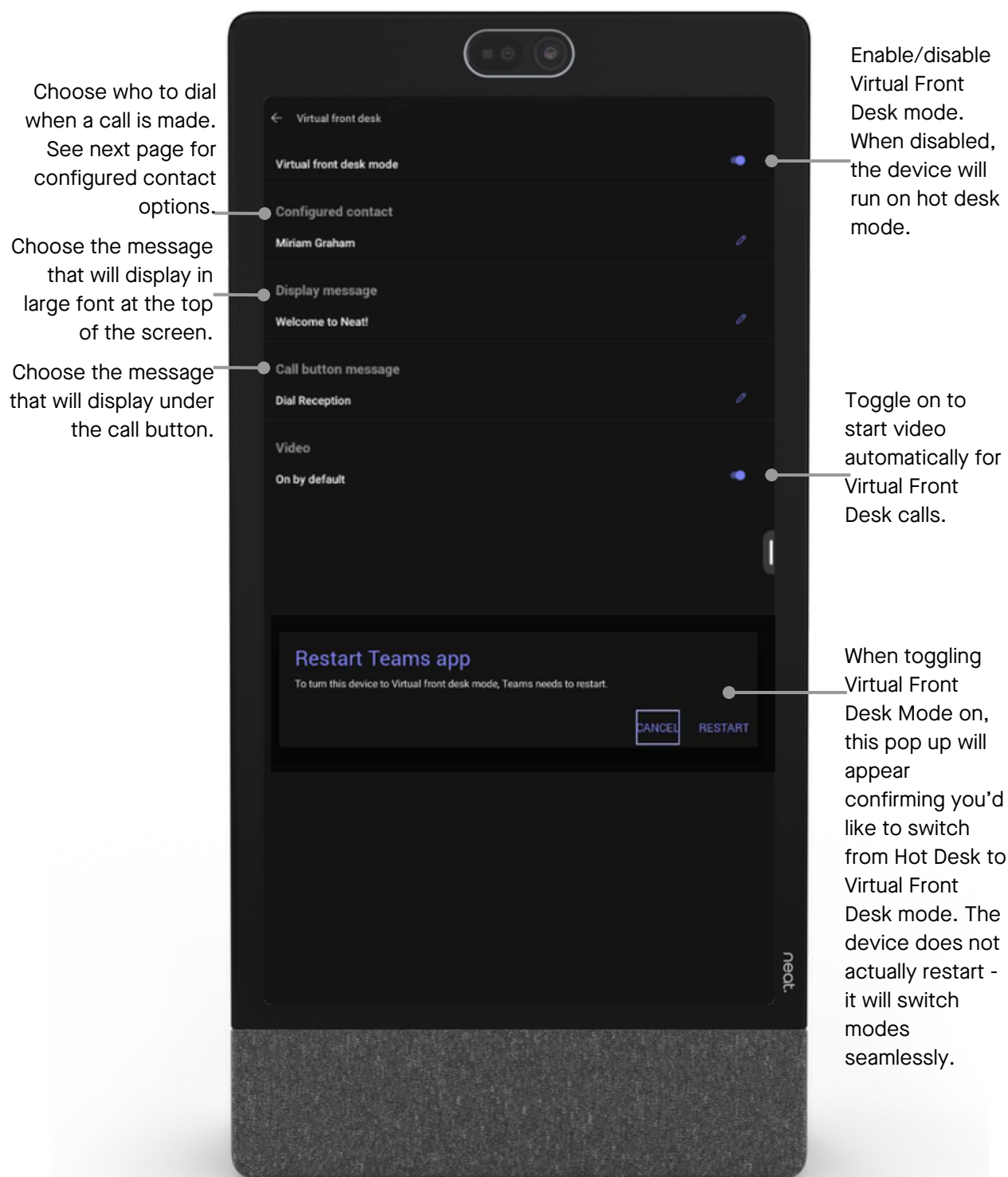


Setup Virtual Front Desk

Select Virtual Front
Desk



Setup Virtual Front Desk



Additional information

Configured contact options:

The configured contact designates where the call will go when the VFD button is pressed. The simplest setup (and a useful setup to ensure initial setup is functional) is to designate an individual Teams user to act as the virtual agent, so when the button is pressed, that user will receive the call. There are three total contact options:

1. A single teams user - call will be directed only to this user.
2. Resource account assigned to MSFT Teams call queue - call queue can direct calls to multiple voice enabled Teams users.
3. Resource account assigned to MSFT Teams auto attendant - auto attendant will provide a menu tree option (ie: select 1 for reception, 2 for help desk, etc.) and can then route to Teams voice user or call queue.

Prepping users for call queue (or auto attendant):

In scenarios where multiple remote agents are needed, a call queue is required. The call queue is a Teams voice routing element and requires specific setup of the call queue and licensing for users that are part of the queue.

Specifically, all users added to the call queue will need to be set up as Teams voice users with a PSTN phone number assigned. There are multiple ways to setup Teams voice for users, however our most straightforward recommendation for organisations that do not currently have Teams voice configured, is to add the Teams Phone with Calling Plan license to call queue users. Once the license has been assigned, phone numbers will need to be acquired and assigned for these users.

Setup a Teams call queue

After preparing users for call queues, the call queue can be setup to be used with Neat Frame in Teams Virtual Front Desk mode. The resource account that is assigned to this call queue will need to be added to the Configured contact section of the VFD settings. There is no need to assign a phone number to the call queue resource account.

Additional information cont. and helpful links

Setup a Teams Voice Auto Attendant

If you would like to give multiple options to the user interacting with Virtual Front Desk, using Teams Auto Attendant is recommended. In scenarios where an Auto Attendant is used, after the VFD button is pressed to initiate the call, the user will be presented with menu options such as: press 1 for the receptionist, press 2 for customer support, etc. On Neat Frame, the dial pad will need to be displayed to make this choice. Destinations for these number selections could be an individual user, a call queue, an auto attendant, etc. The resource account that is assigned to this auto attendant will need to be added to the Configured contact section of the VFD settings. You will not need to assign a phone number to the Auto Attendant resource account.

Helpful links

- Purchasing Calling Plans: <https://learn.microsoft.com/en-us/microsoftteams/calling-plans-for-office-365#how-to-buy-calling-plans>
- Assigning Teams Phone with Calling Plan add-on licenses to users: <https://learn.microsoft.com/en-us/microsoftteams/teams-add-on-licensing/assign-teams-add-on-licenses#using-the-microsoft-365-admin-center>
- Get phone numbers for your users: <https://learn.microsoft.com/en-us/microsoftteams/getting-phone-numbers-for-your-users#get-new-phone-numbers-for-your-users>
- Add an emergency location (each users must have an emergency location assigned): <https://learn.microsoft.com/en-us/microsoftteams/add-change-remove-emergency-location-organization#using-the-microsoft-teams-admin-center>
- Assign phone numbers to users: <https://learn.microsoft.com/en-us/microsoftteams/getting-phone-numbers-for-your-users#assign-phone-numbers-to-users>
- How to setup a Teams Call Queue: <https://learn.microsoft.com/en-us/microsoftteams/create-a-phone-system-call-queue?tabs=general-info>
 - Note: Make sure to set “Conferencing Mode” to enabled all Call Queues utilized with Virtual Front Desk.
- How to setup a Teams Auto Attendant: <https://learn.microsoft.com/en-us/microsoftteams/create-a-phone-system-auto-attendant?tabs=general-info>