Teams Fax App

Teams User

Quick Reference

Microsoft

MOMENTUM

Teams Fax App Installation

This guide outlines the basic steps a Teams User must follow to install the Teams Fax App in their Microsoft Teams Client. It includes the steps to add and set up the Fax app for an individual Teams User and for Group Fax use within a *Team*. Your organization's Teams Global Administrator added this application to the Teams environment for use by properly provisioned Teams Fax users.

Important Notes:

- The Fax App will <u>only</u> install and function for Teams users configured with a license for the Teams Fax user service.
- If the Fax App is not accessible from the Teams Client, a Teams Admin within your organization will need to address this.
- Microsoft Policies may have been set on the tenant to prevent user access to Apps or for installation of the Teams Fax app on the Teams client. This issue is considered outside the scope of the Service Provider's control, support, or assistance.
- *Contact your Teams Admin with questions or for assistance related to Teams Fax access in your Teams client.*

User Fax App Install/Setup

This section provides the basic steps required to install and use the Teams Fax App in the Teams Client for an end-user.

Add Teams Fax App to the Desktop Client

In your Teams Desktop Client:

1. Navigate to **Apps** on left menu panel.

2. Navigate to **Built for Your Org** - or use the Search field to find *Fax* (Momentum Telecom)
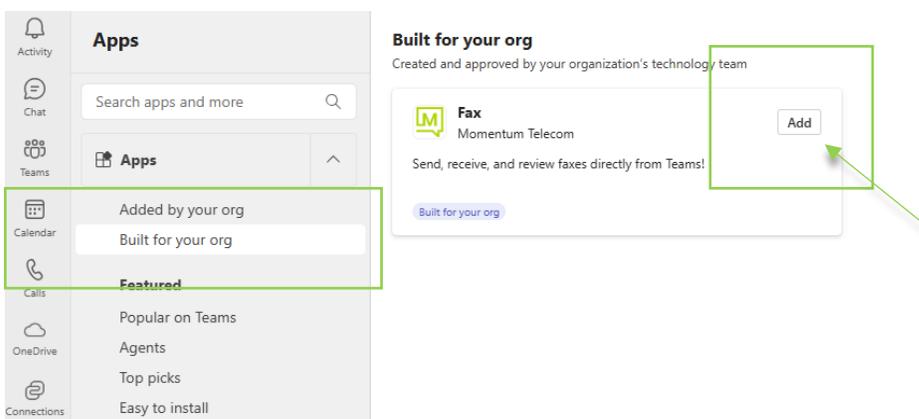
3. Click the **Add** button in the Fax App tile to open the information pop-up dialog.

4. Click **Add** on pop-up window to install the app.
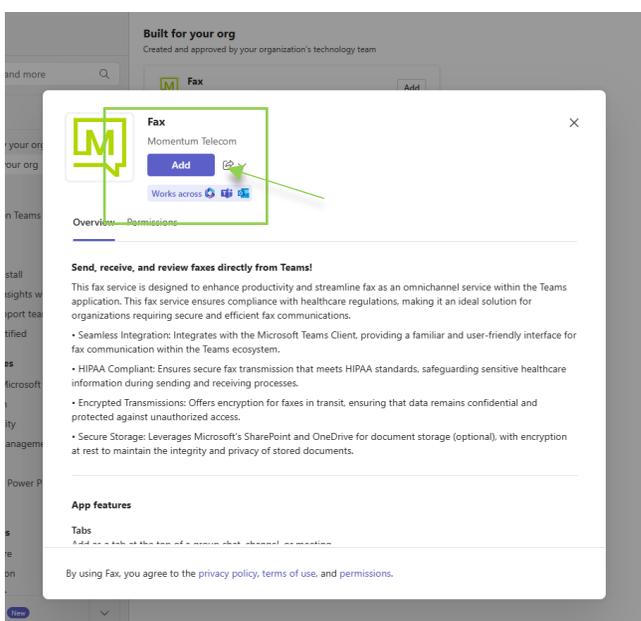
Open Teams Fax App and Define Settings

Once the Fax App is installed on the Teams user's client, the application will automatically sign the user in and display a new Fax icon in the left navigation menu. *Contact your Teams Admin if you encounter any issues.*

1. Click on the Fax Application menu icon to open your new Fax App in Teams.
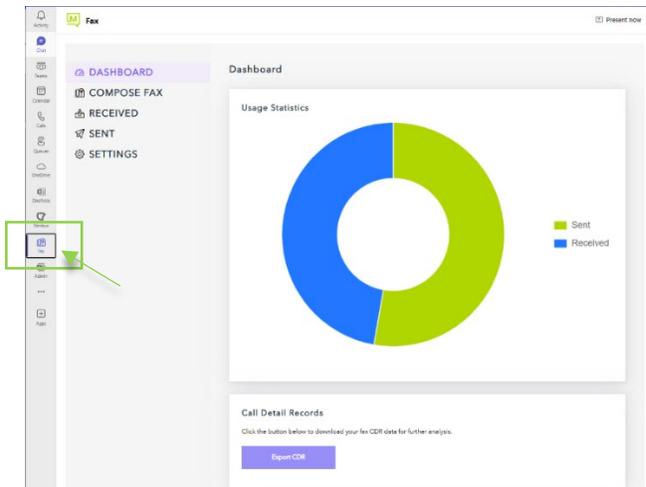
2. Navigate to **Settings**.
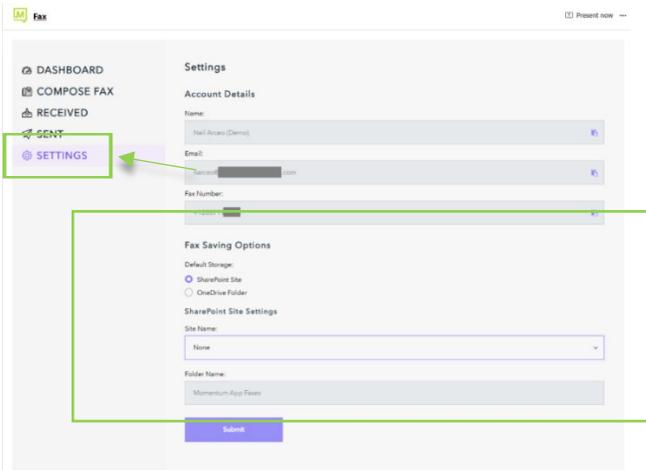
3. Define the following **Fax Saving Options**.

    • **Default storage**: Choose ⊙ SharePoint site or ○ OneDrive folder.

    • **Site Name**: If *SharePoint Site* was selected, choose the Sharepoint Site name from the drop-down list.
              Note: The User <u>must</u> have read / write access to the SharePoint site selected.

    • **Folder Name**: If *OneDrive Folder* was selected, a Momentum App Faxes folder will be the storage
              location - or (if made available to edit) navigate to a local OneDrive folder location to select it.

4. Click **Submit** to save the settings.

<div align="center">Your basic setup for Teams Fax for your User account is complete.</div>

You are now ready to send and receive faxes from your Teams Fax App.

    • Statistics for this Team's faxes are displayed on the Fax Dashboard along with an option to download a CDR report.

    • Faxes sent/received by members of this Team will be listed for review in the sections for Sent and Received.

    • Faxes can be created and sent within the **Compose Fax** section.

    • All Fax files will be saved to the storage location defined in Settings.
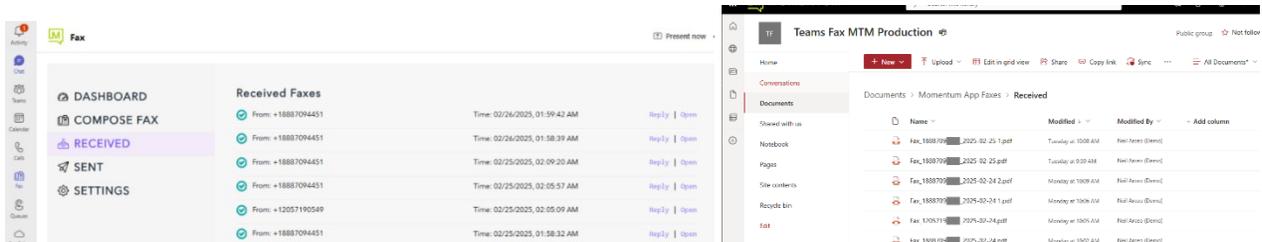
Group Fax App Install/Setup

This section provides the basic steps required to install and use the Teams Fax App within an MS Teams "*Team*" for group usage.

Add Teams Fax to a Team (Group)

Important Note: The Teams Group Fax service app will only install and work for a Microsoft Teams "**Team**" that has been set up and provisioned with a license for the Fax service. Check with your organization's Teams Admin.

In your Teams Client:

1. Click on the **Teams** icon in the left navigation menu.

2. Select the correct Team in the list to display it.

3. Click on the **Add a tab** ➕ icon displayed to you within the Team's header section options.
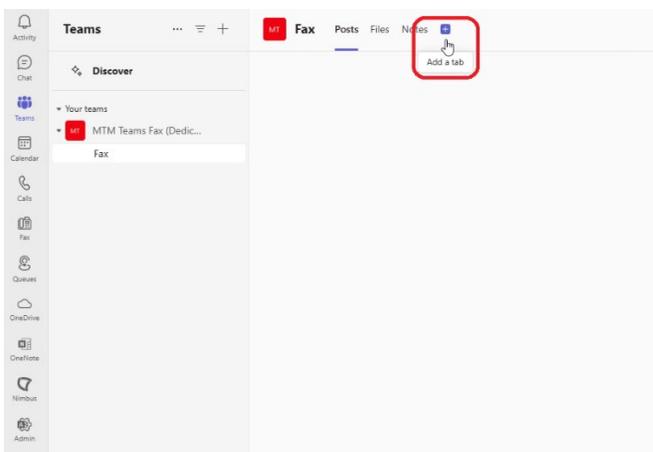
4. Locate and click on the **Teams Fax App** to select it within the Apps dialog. This opens the app's *About* dialog.
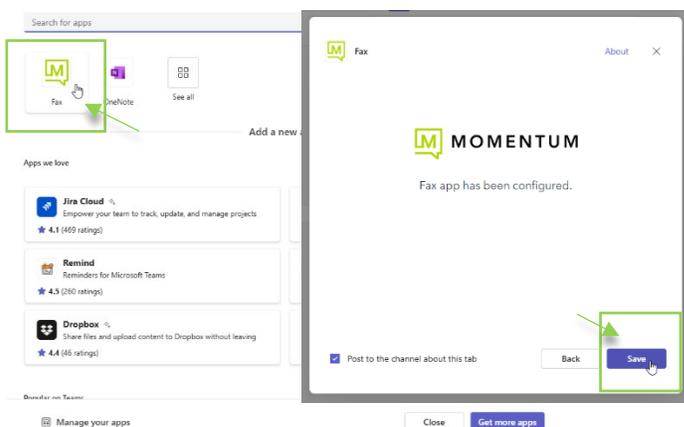
   Optional: Click to enable ☑ ***Post to the channel about this tab*** to include a group notification to the Team when Fax is added.

5. Click the **Save** button on the pop-up dialog to add the Fax App as a tab in the Team (Group).
   Teams Fax is added to the Team (Group) as a Tab and is accessible to assigned group members by clicking on the Fax Tab in this view.

Open Teams Fax App Tab and Review Settings

1. Click the new **Fax** tab to open the application. Members of the "team" will also have access to the Fax application via this tab.
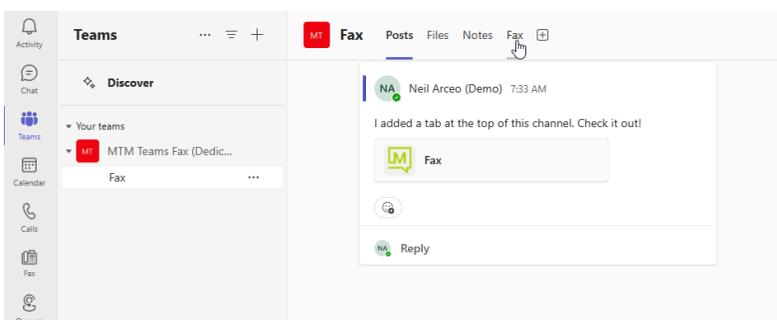
2. Click on **Settings** to review the basic setup for fax storage so you know where to look for files in SharePoint.
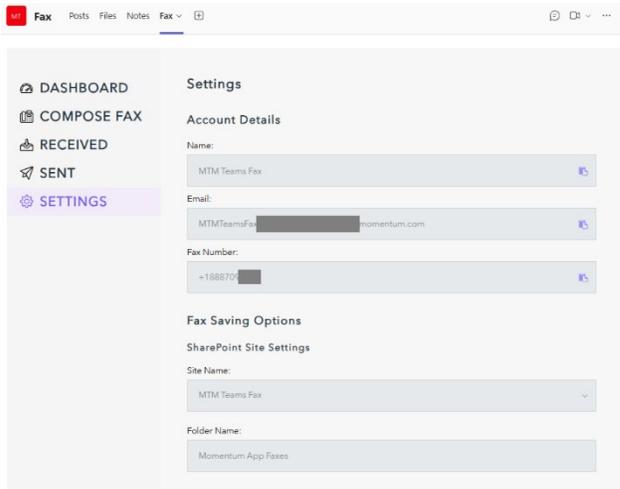
Note: The storage location for a Group Fax App is predefined (locked) to save all files to the SharePoint site for the selected Team.

This completes the setup steps for Group Fax in the selected Team.

The Team's group members can now send and receive faxes via the Fax tab within the Team.

- Statistics for this Team's faxes are displayed on the Fax Dashboard along with an option to download a CDR report.
- Faxes sent/received by members of this Team will be listed for review in the sections for Sent and Received.
- Faxes can be created and sent within the **Compose Fax** section.
- All Fax files will be saved to *Sent* and *Received* folders in the "Team" SharePoint site.
  Reminder: The name of the Team's SharePoint site is displayed in the Fax App tab's Settings section.
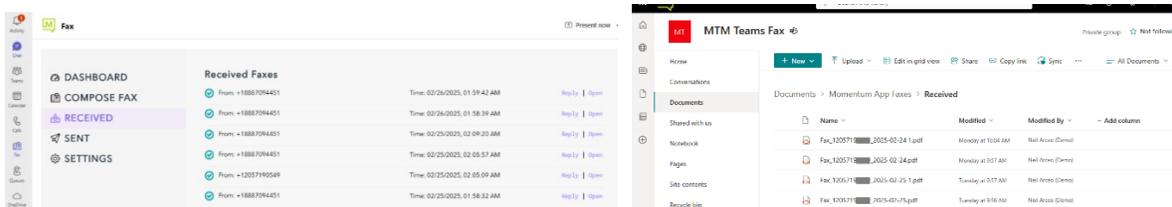
⚠️ **Important Note:**
Fax data/file storage and backup policies are the responsibility of the purchasing organization and its users. The Service Provider does not store or 'back up' faxes or fax information on behalf of any organization or its users. The Service Provider cannot assist with fax data or file recovery if fax data is purged or a fax file is deleted from the organization's storage. Contact your organization's Microsoft Administrators for more information or assistance.

Teams Admins can reference the Teams Admin: Teams Fax Deployment Quick Reference Guide.