

Delegation Settings

Overview: MS Teams calls "delegates" as someone that can make and receive calls on your behalf. "You can pick someone in Teams to be your *delegate*—when you add a delegate, you're essentially sharing your phone line with them, so they can see and share all of your calls."



Please note: Configuring Delegates is ONLY accessible on the Microsoft Teams DESKTOP client for Windows and Mac

Step 1: Set up the process to "Share your line with a Delegate"

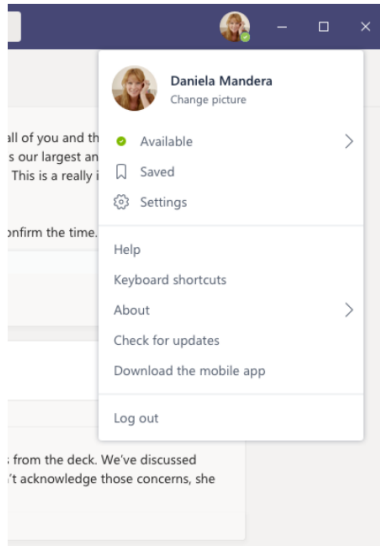
Share a phone line with a delegate

Microsoft Teams

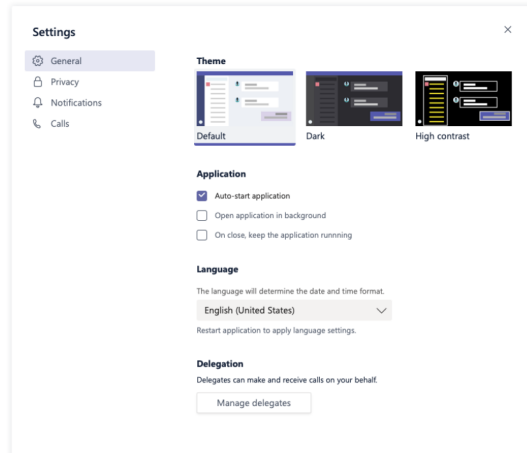
You can pick someone in Teams to be your *delegate*—to receive and make calls on your behalf. When you add a delegate, you're essentially sharing your phone line with them, so they can see and share all of your calls.

Add a delegate

1. Go to your profile picture at the top of the app and select **Settings > General**.



2. Under **Delegation**, select **Manage delegates**.



Note: If you don't see any options for delegation in your settings, it's likely because you don't have an Enterprise Voice or Business Voice license. Also note that it can take up to 24 hours for changes in licenses to take effect.

3. Click **Your delegates** and type the person's name in the **Add a delegate** box.
4. When you add a delegate, you'll see some permissions settings. In addition to enabling your new delegate to make and receive calls on your behalf, you can also let them change your call and delegate settings for you. Select the permissions you want to give them and click **Save**.
5. Your delegate will receive a notification letting them know about their new status.

Your new delegate will now appear in your delegates list, and this list will be a default selection in your [call forwarding and simultaneous ring](#) options.

- Go to **Settings > Calls**. Under **Forward my calls**, you'll see **My delegates** as the default **Forward to** option.
- Go to **Settings > Calls** again. Under **Calls ring me**, you'll see **My delegates** as an option in the **Also ring** menu.

Notes:

- Delegates can see when you're on a call and who it's with.
- Any calls made or received by you or on your behalf can be put on hold or resumed by you or your delegates.

Step 2: Delegate confirmation (in Microsoft Teams)

Executive User (username) added you as a delegate.

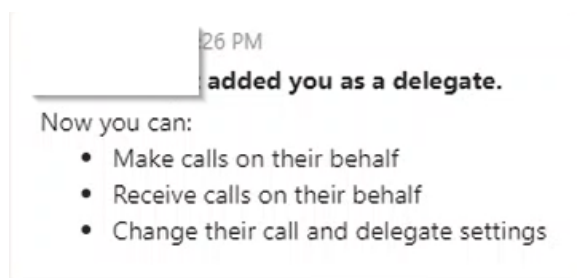
Now you can:

Make calls on their behalf

Receive calls on their behalf

Change their call and delegate settings

Screenshot from MS Teams:

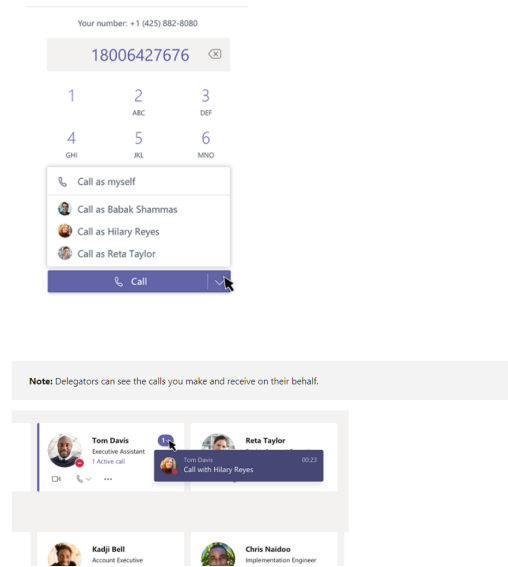


Step 3: Make and Recieve Calls as a Delegate

Make and receive calls as a delegate

Once you've been added as a delegate, you can make and receive calls on someone else's behalf.

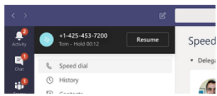
1. Go to or start a one-on-one chat with the person you want to call, or dial a number on your dial pad.
2. Select **Call**.



How to: Put calls on Hold as a Delegate

Put calls on hold as a delegate

Delegates can also put calls on hold. Just select **More actions** in your call window and select **Hold**. Everyone in the call will be notified that they've been put on hold, and you or the person you are a delegate for can continue the call by clicking **Resume**.



How To: Change your boss's call and delegate settings

Change your boss's call and delegate settings

As a delegate, you can view and edit call and delegate settings on behalf of someone else.

1. Click on your profile picture at the top of Teams and choose **Settings > General**.
2. Select **Manage delegates** under **Delegation**.
3. Click **People you support**. Here, you'll see a list of the people you're a delegate for. Hover on any name in the list and hit **More options** to see your choices: **View permissions**, **Change delegates**, and **Change call settings**.
4. Choose **View permissions** to edit the permissions of any of your boss's delegates. **Change delegates** to add or remove delegates for your boss, or **Change call settings** to adjust their call settings for them.

Use Case: Take and make calls for an Executive to a Receptionist relationship.

1st example: Warm Transfer (CONSULT) Call for Executive when answered by Receptionist.

Collaborate with the Executive via CONSULT option in MS Teams. The Receptionist can message or call the Executive

2nd Example: PARK and RETRIEVE Call for Executive when answered by Receptionist.

