

# Clerk SMS App for Microsoft Teams

Welcome to Clerk Chat! We're thrilled and stand ready to assist you in maximizing your Microsoft Teams experience with enhanced SMS tools. If you have any questions or need further assistance, contact your service provider's support team for guidance. Your Service Provider and Clerk Chat are committed to simplifying the process of enabling SMS on Microsoft Teams by offering an exceptional end-to-end onboarding experience that is easy to complete and manage. Here's a simple overview of the key steps involved in getting started with Clerk Chat.

## Prerequisites: Licenses

A: First, to enable Clerk Chat for the employees in your organization's Teams environment, ensure all users already have full Microsoft Teams calling enabled licenses from Microsoft (or from your Service Provider). Typically, an E5 type license from Teams, but there are other options like Operator Connect or Direct Routing via a Service Provider. Contact the Project Manager or Account Manager assigned to help by your Service Provider to discuss those options for clarity. Also, each Teams account that will use Clerk Chat must be calling enabled (included with E5 type licenses). Check with your Implementation Project Manager to verify you have the necessary connectivity license requirements covered.

B: And then of course, over the top of the MS Teams licenses – your organization will also need to purchase the appropriate licenses for Clerk Chat application access and usage from the Service Provider that will be assigned to each of the Teams calling-enabled accounts that will be utilizing the Clerk Chat SMS app and tools.

## The Implementation Process Basics

### 1) Connect and Authorize Clerk Chat with Teams

The connection of Clerk Chat to Teams is the responsibility of the Customer. With the right call enabled licenses for both Microsoft Teams and for Clerk Chat in hand, getting started is easy. Each organization's Teams Global Admin needs to launch the App and follow the steps to connect Clerk Chat to Microsoft Teams. This includes the connection as well as authorizing access and use of the Clerk Chat app for the organization (or individual users) and then selecting the Teams users/accounts that will be Clerk Chat App enabled on your account. Administrators can also define the level of access granted to each user quite easily – usually Members, but other security levels are available. Clerk Chat walks the Teams Admin through the basic connection process with the app.

Check [here in the MS Teams Admin documentation](#) to learn more about 3<sup>rd</sup> party app setup policies and procedures in the TAC for managing your Teams environment.

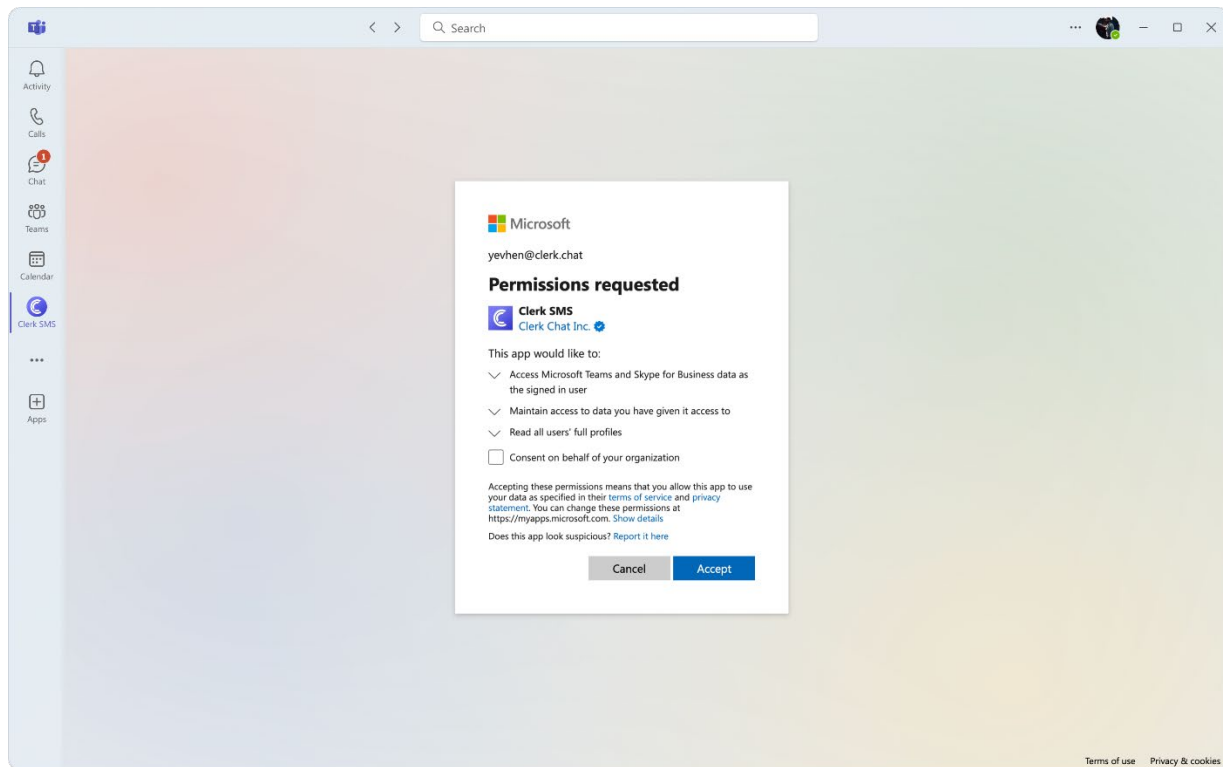
- 2) Register your "brand" with TCR: If your organization wants to use 10DLC numbers for business texting, you must register with TCR. This process keeps your texts from being blocked by the carriers as SPAM or Smishing. The app offers a section for admins to accomplish this important task and offers guidance through the process of submitting your application. Note: If your organization wishes to register any Toll-Free numbers for business texting, that's a specialized manual process that cannot be completed within the app. Connect with your Service Provider contact (AM or PM) for guidance.
- 3) Integrate with your CRM or import your contacts: If you want to import contacts from Microsoft Teams, Active Directory, and any other CRM or databases into Clerk Chat, the platform will walk you through these steps, enabling you to bring all contact related communications data into the app and Teams.
- 4) Other Add-in integrations: You can also add-in any other integrations you want to use. Recommended add-ins include setting up an archiving solution, such as Smarsh or Global Relay, to ensure you can capture all the communications data you create within Teams directly. To add an Archiving integration to your account, Workspace Owners or Admins can simply click on the "Integrations" tab within Clerk Chat, choose the software you want to use, and follow the steps provided to complete the integration.
- 5) Employees Can Now Add the App to Teams: Your end-users can then add the app to their Teams instance (or log into the website application) and begin using the tools in Clerk Chat to send and receive texts following all federal regulations and rules, as well as organizational directives.

Once the implementation of Clerk Chat within the Teams environment is complete and the app is made available to authorized Teams users, Administrators can monitor user adoption rates and engagement and gain insight into how your employees and contacts interact with this new messaging platform.

## To Roll Out Clerk SMS App to Your Enterprise

A Teams Global Admin can integrate and provide the Clerk SMS app to individuals you wish to grant access within your Microsoft Teams environment. This is not required as the tools in the main Clerk Chat web application are the same as those displayed in the Clerk Chat 3<sup>rd</sup> party Teams app called Clerk SMS.

Clerk Chat requires a set of permissions to your Microsoft tenant in order to properly configure your phone numbers. We prioritize security and have undergone thorough approval processes with Microsoft, as well as third-party audits, to ensure your data stays safe. Rest assured, we are committed to maintaining the highest standards of security and compliance.



### Access Microsoft Teams and Skype for Business data as the signed in user

This permission enables the Clerk Chat app to access information about the phone numbers linked to your tenant. It allows us to identify which numbers are assigned to users, and how PSTN connectivity is set up within your tenant. This permission does not grant access to any other business data.

### Maintain access to data you have given it access to

This permission is required with any Microsoft tenant application. It allows Clerk Chat to refresh authentication tokens, which is essential for the app's functionality and user login to the app. This permission does not provide the app with any additional permissions.

### Read all users' full profiles

This permission enables Clerk Chat to access user names and email addresses from your tenant. This data is then synced to Clerk Chat to accurately display user details and enhance the personalized user experience.

### Consent on the behalf of your organization

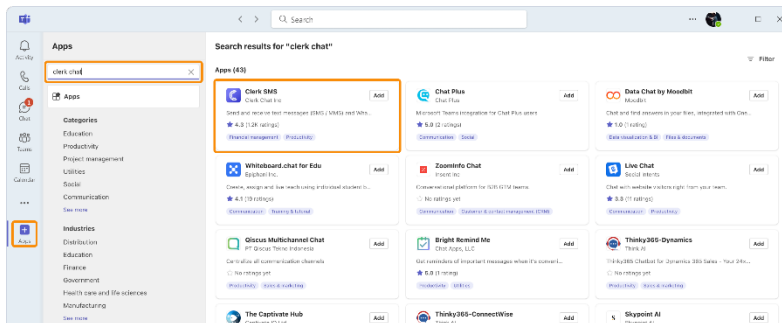
Our suggestion is to accept on behalf of organization. This allows the Admin to grant permissions to Clerk Chat for all users within the organization and still limit access by clerk Chat License assignment. When an administrator consents on behalf of the organization, it eliminates the need for every individual user to request Admin consent to load and use the application one by one, streamlining deployment and access.

The Teams Global Admin can use Microsoft Teams app setup policies within the TAC to install and pin Clerk app as desired.

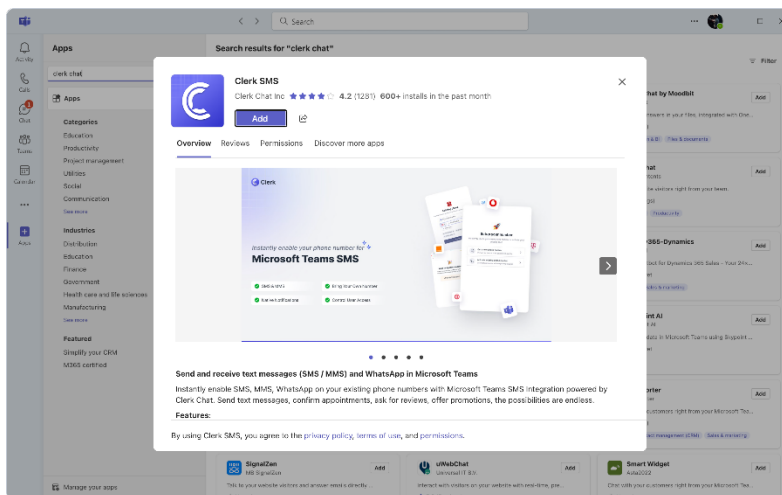
Reference the section on App integrations within the [Microsoft Documentation](#) for full breakdown on managing your app policies in Microsoft Teams.

Once Available to users in the Teams chat Apps for the Org, installation of the Teams App is easy for Teams users that were assigned a license and authorized.

1. Click on the three dots under Apps in the left navigation panel.
2. Search for **Clerk SMS**, and the Clerk SMS integration app displays.
3. Click on the App to view more information and the Add button.



4. Click on the Add button in the Clerk SMS pop up dialog to begin.



If the Teams Admin granted approval for quick app install without requiring manual Admin consent/approval, the Clerk App will get integrated with your Teams Account on the left panel almost instantly.

5. Right-click on the Clerk SMS icon in the left panel to Pin it for easy access.
6. Then the user can click the icon to open Clerk SMS, choose the desired phone line to send an outbound text from, and get started.

