Project Plan: PBXact Integration with Microsoft Teams Using Sangoma FreeSBC

**Project team :**

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**Week 1: Planning and Preparation**

**1. Define Project Scope and Objectives**

* Understand the need for PBXact and Microsoft Teams integration and pricing
* Identify the team members involved, including network administrators and engineers.
* Confirm required hardware, licenses, and software installations.

**2. Verify Infrastructure Requirements**

* Confirm PBXact system is fully operational and updated.
* Ensure that the appropriate Microsoft 365 licenses (E5, or E3 with Phone System add-on) are in place.
* Obtain a valid public IP address for FreeSBC and PBXact (if necessary).
* Procure TLS certificates from a trusted Certificate Authority for FreeSBC.

**3. Install and Configure Sangoma FreeSBC**

* Download and install FreeSBC on a suitable server or virtual machine.
* Verify system requirements and set up initial configuration, including network settings and access to the FreeSBC web interface.

**4. Kickoff Meeting**

* Hold a project kickoff meeting to discuss timeline, deliverables, and roles.

**Week 2: FreeSBC and PBXact Configuration**

**1. Configure SIP Trunks Between PBXact and FreeSBC**

* Set up a SIP trunk in PBXact pointing to FreeSBC.
* In FreeSBC, create a SIP profile for PBXact, ensuring proper authentication and connection.

**2. Create Initial Call Routing Rules**

* Configure outbound call routing rules on PBXact to route Teams-related calls to FreeSBC.
* Configure FreeSBC’s inbound and outbound routing to handle SIP signaling between PBXact and Teams.

**3. Install TLS Certificates**

* Install valid TLS certificates on FreeSBC for Microsoft Teams to enable secure communications.
* Ensure the certificate common name (CN) matches the FQDN for FreeSBC.

**4. Verify Firewall Configuration**

* Ensure that firewalls allow the required ports for SIP, RTP, and TLS traffic (ports like 5061 for SIP-TLS and RTP range).
* Verify PBXact and FreeSBC are accessible over the internet, considering public IPs and NAT if necessary.

**Week 3: Microsoft Teams Configuration and Integration**

**1. Enable Direct Routing in Microsoft Teams**

* Log in to the Microsoft Teams Admin Center.
* Configure Direct Routing and add FreeSBC as an approved SBC using its FQDN.

**2. Configure Voice Routing Policies**

* Create voice routing policies in Teams to define how calls should be routed to FreeSBC.
* Set up dial plans for Teams users that align with PBXact extensions.

**3. Assign Phone Numbers and Licenses**

* Assign phone numbers to Teams users and ensure they have the appropriate Phone System licenses.
* Ensure user numbers follow E.164 format and are correctly routed through FreeSBC.

**4. Test Internal Call Flow**

* Perform initial tests to verify call routing between Teams users and PBXact extensions.
* Troubleshoot any issues related to SIP connectivity, number formatting, or routing errors.

**Week 4: Final Testing, Optimization, and Handoff**

**1. Conduct Full System Testing**

* Test all critical call flows:
* Teams to PBXact extensions.
* PBXact to Teams users.
* Outbound PSTN calls from Teams (if applicable).
* Verify features such as voicemail, call transfers, and call forwarding are functioning as expected.

**2. Monitor Call Quality and Performance**

* Use FreeSBC’s diagnostics tools and monitoring software to check call quality and SIP signaling.
* Ensure optimal media and codec settings between PBXact and Teams for smooth call experiences.

**3. Troubleshoot and Resolve Issues**

* Address any remaining issues with SIP normalization, call routing, or performance.
* Review firewall configurations, TLS certificates, and SBC setup to ensure security and compliance with Microsoft Teams Direct Routing requirements.

**4. Handoff and Documentation**

* Document the final system setup, including SIP trunks, routing rules, and Microsoft Teams configurations.
* Conduct training for the team on managing the integrated system.
* Schedule a handoff meeting to review the project’s completion and provide any necessary support documentation.

**Deliverables**

1. Configured FreeSBC and PBXact SIP trunks and routing rules.
2. Microsoft Teams Direct Routing setup with working voice routing policies.
3. TLS certificates installed and functional.
4. Full call flow testing completed with documented results.
5. Handoff meeting and training completed.

**By the end of Week 4, the PBXact and Microsoft Teams integration via Sangoma FreeSBC will be fully operational, with routing tested and verified.**