How to Join a Teams Meeting

This document will guide you through the process and options available to join a Teams meeting.

1. Find the email your advisor sent you or the saved calendar event that has the meeting information.

   - When you open the email or calendar entry, you'll see a section that looks like Image 1. We'll use this to join the meeting.

   - Select Click here to join the meeting.

   - Select Continue on this browser if you don't already have the Teams application installed on your computer (Image 2).
     - Note: If you prefer, select Download it now and follow the online instructions for installing.

   - Select Join on the Teams app if you have the Teams application installed on your computer.

   - If you're using a phone to join the meeting, clicking Join on the Teams app will open the Teams mobile app and join the meeting there.
     - Phone users who don't already have the Teams mobile app but want to use it should select Get Teams and follow instructions.
     - Note: In the section below Meeting ID and Passcode (Image 1), you'll see two links meant for new Microsoft Teams users, who may either download the Teams application or join a Meeting in their browser (without needing to download the Teams app).
     - Choosing Download Teams will bring up options to install the application, gving you a more feature-rich experience.

Microsoft Teams meeting

Join on your computer, mobile app or room device
Click here to join the meeting

Meeting ID:
Passcode:
Download Teams | Join on the web

Or call in (audio only)

United States, Boston
Phone Conference ID:
Find a local number | Reset PIN

In Shared Folder   Calendar -

Image 1

Join your Teams meeting

Continue on this browser

Join on the Teams app

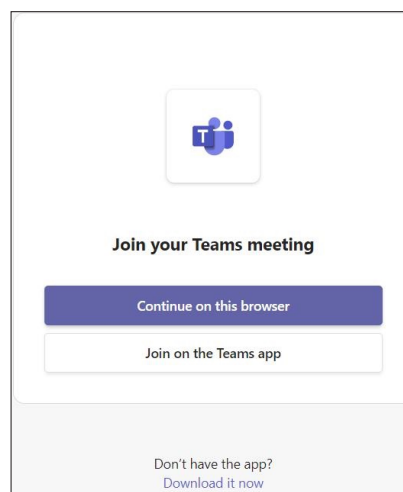Don't have the app?
Download it now

Image 2

Potomac Financial Private Client Group, LLC
11130 Sunrise Valley Drive | Suite 130 | Reston, VA 20191
703.891.9960 | 877.253.1287 fax

2. Your web information should populate the form automatically (Image 3), but if it doesn't, simply copy and paste the Meeting ID and Passcode information from your meeting invitation (Image 1) and select Join a meeting.

   - To copy text, select it and either press the Control and C keys (ctrl+c) or right click on the highlighted text and choose Copy.
   - Paste works similarly: After copying text, either press Control and V (ctrl+v) or right click and select Paste.
     - Note: Meeting IDs consist of seven or more alphanumeric characters only.

3. If prompted, select Allow to give Teams access to your microphone and camera (Image 4).

4. In the resulting screen (Image 5), you can turn your camera on or off to test your video settings and adjust your audio settings before selecting Join Now to join your meeting.

5. If you would like to change your audio or video settings, select the icon below Computer audio; from this new menu you can change all your settings.
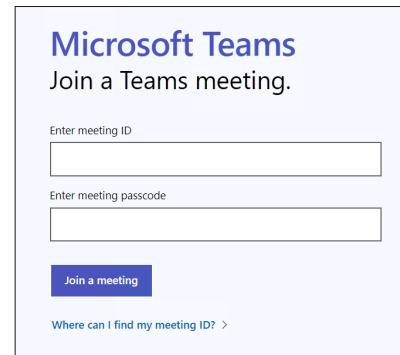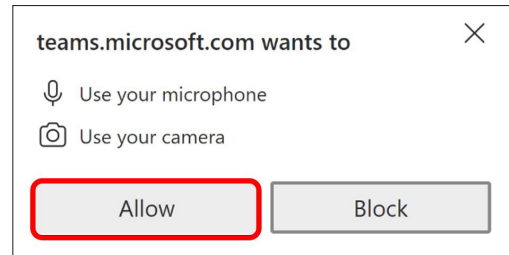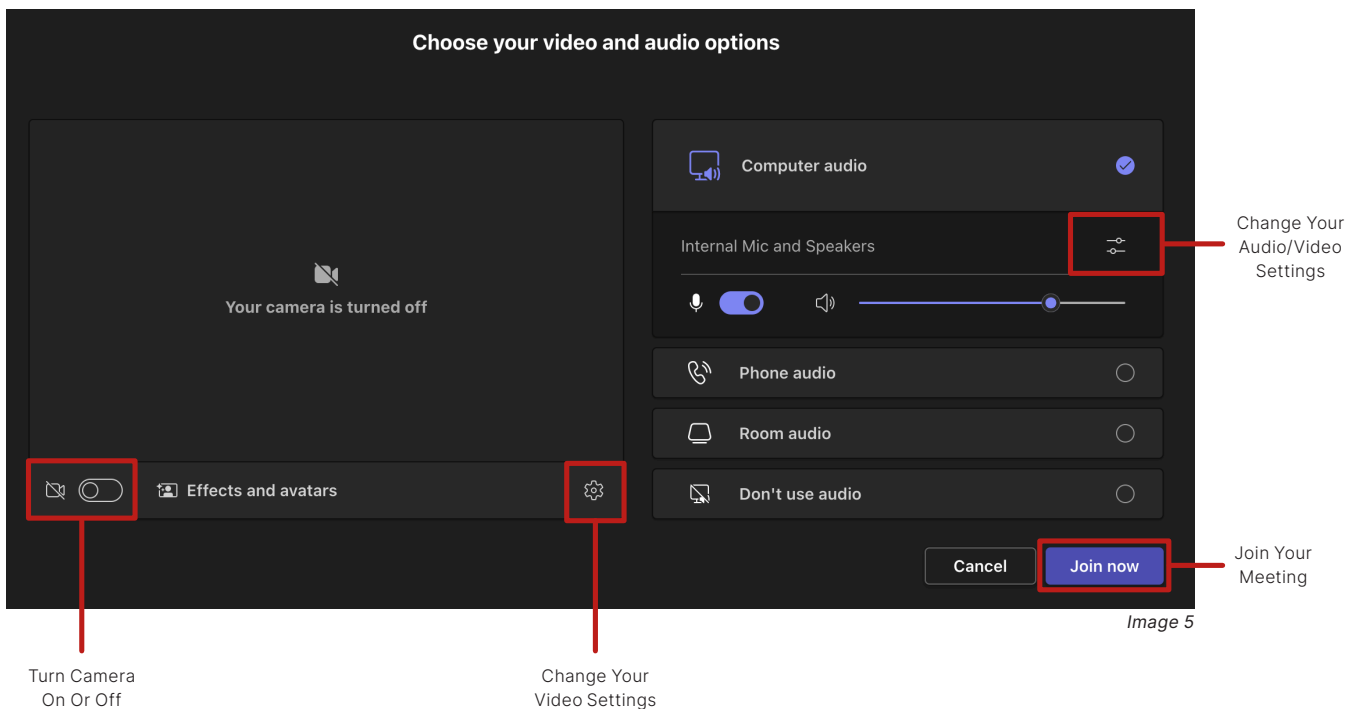

Microsoft Teams
Join a Teams meeting.

Enter meeting ID

Enter meeting passcode

Join a meeting

Where can I find my meeting ID? >

Image 3

teams.microsoft.com wants to   ✕

🎤 Use your microphone

📷 Use your camera

Allow   Block

Image 4

Choose your video and audio options

Your camera is turned off

Computer audio

Internal Mic and Speakers

Phone audio

Room audio

Don't use audio

Effects and avatars

Cancel   Join now

Change Your Audio/Video Settings

Join Your Meeting

Image 5

Turn Camera On Or Off

Change Your Video Settings

6. Once in your meeting, you can mute and unmute your microphone or turn your camera on and off at any time using the options in the top right of the meeting window (Image 6).

7. You can change and troubleshoot your audio and video settings from within a meeting by selecting **More > Settings > Device settings** (Image 7).
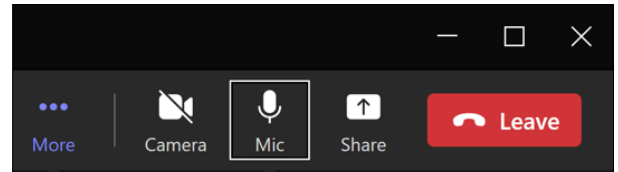
- If people in a meeting can't hear you, you might have your microphone muted.
  - Some devices have a physical mute option on the device itself, so check that your headphone boom is not in the mute position (usually upright or away from your mouth), and that your external mic's physical mute button is not turned on.
  - Make sure your device is unmuted and selected from the **Microphone** dropdown menu.
  - If your mic doesn't appear in the **Microphone** dropdown menu, unplug it and plug it back in.
  - If you're having trouble with a Bluetooth mic, make sure it's charged and not connected to another device. Then try reconnecting it.
- If you can't hear others during a call or meeting, check your speaker volume and confirm it's connected (Image 8).
  - Make sure your device is unmuted and selected from the **Speaker** dropdown menu.
  - If your speaker isn't in the **Speaker** dropdown menu, unplug and plug it back in.
  - If you're having trouble using a Bluetooth mic, make sure it's charged and not connected to another device. Then try reconnecting.
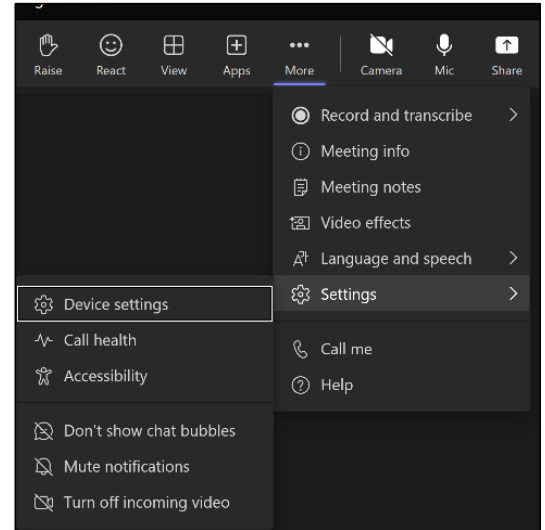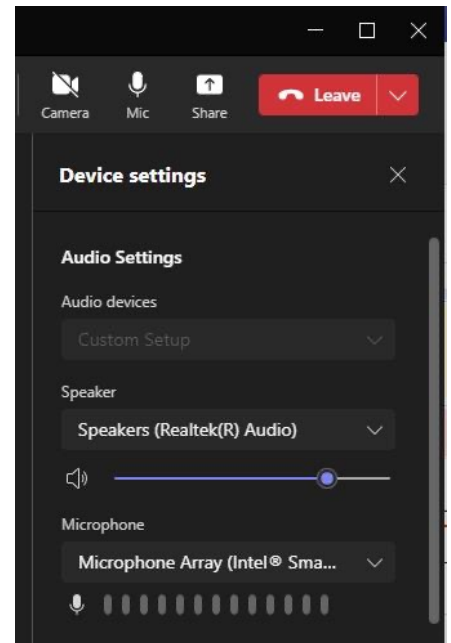

Image 6

Image 7

Image 8