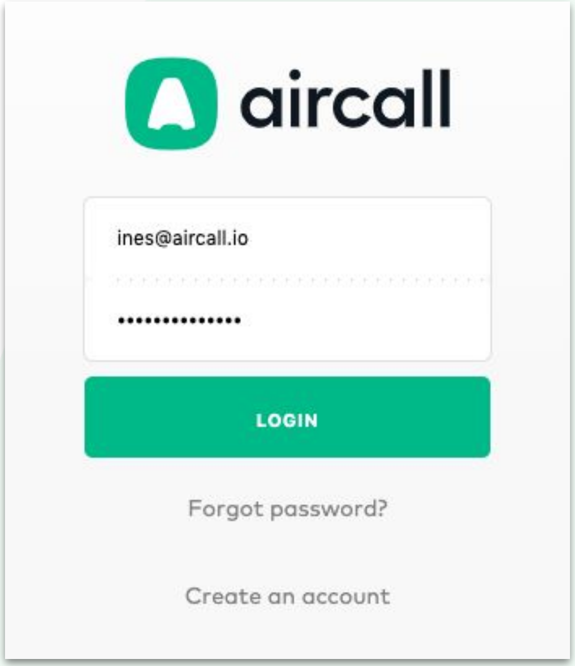
aircall

The phone system for **modern business.**

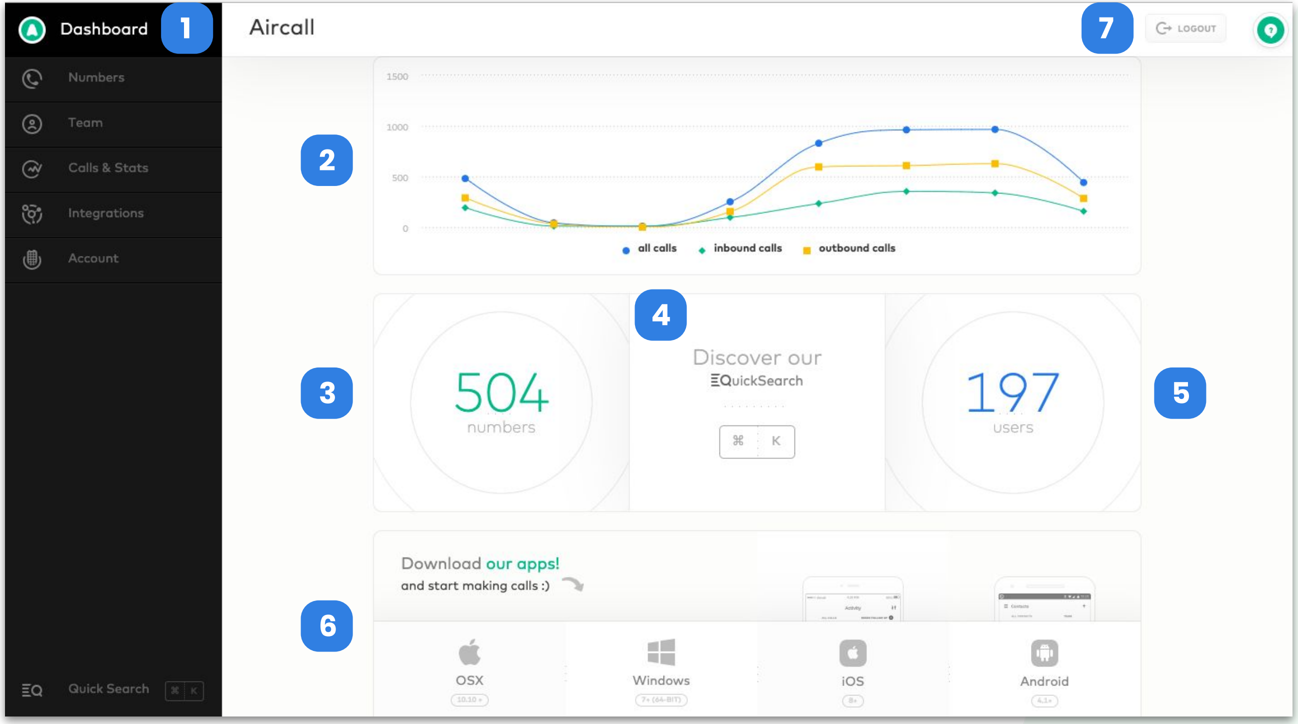
Admin Onboarding Guide

Access the dashboard

1. **Accept your invitation** request sent by email and follow the link to create your password
2. Go to dashboard-v2.aircall.io
3. **Login** with your professional email and password



Home page / Dashboard



1 Dashboard sections

2 Overall performance graph

3 Total numbers on the account

4 Quick search bar

5 Total added users

6 Access Aircall Apps

7 Logout from the session

Getting Started

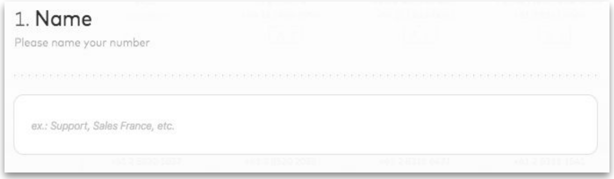
All you need for happy calling!

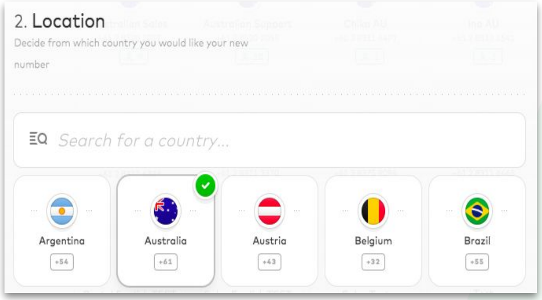
Adding and configuring numbers

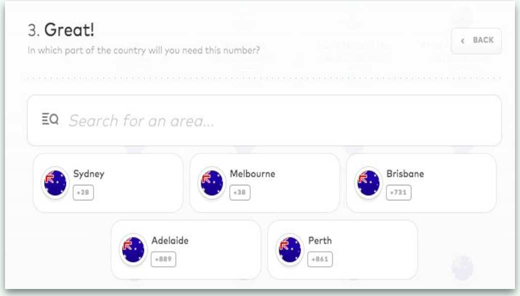
Creating a new number

Step 1

Click





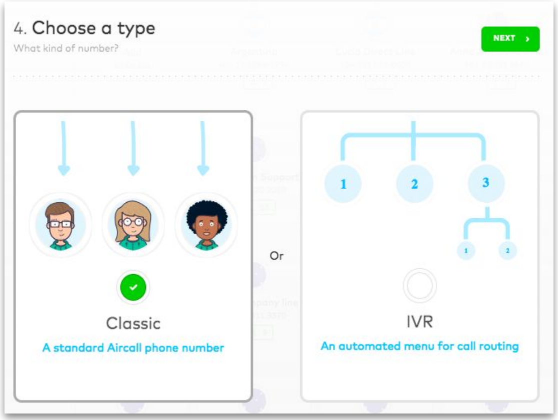


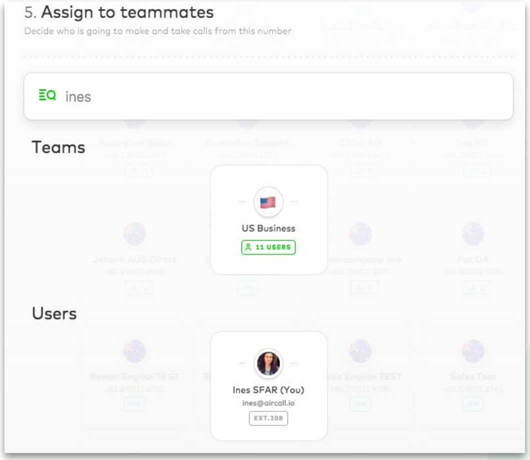
NAME your number in order to find it more easily

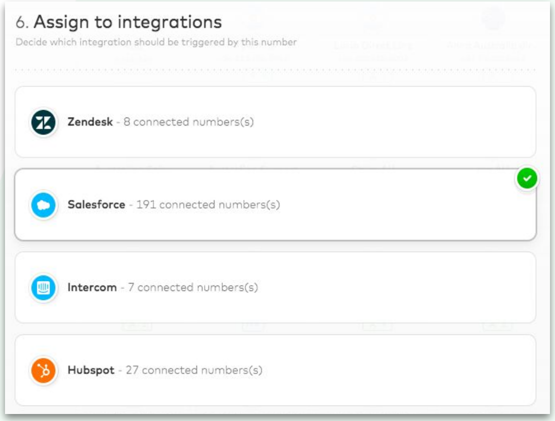
CHOOSE the country code of your number

SELECT a specific region for your number

Creating a new number





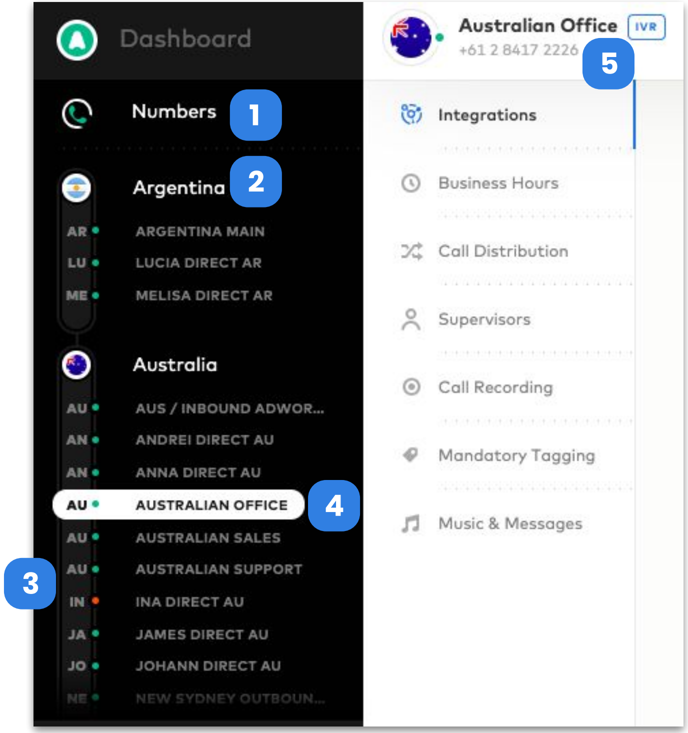


DEFINE the number type between classic or IVR

ASSIGN the number to teams or teammates in order for them to use

ADD the number to active integrations to ensure synchronization

Configuring a number



1 Numbers' sections

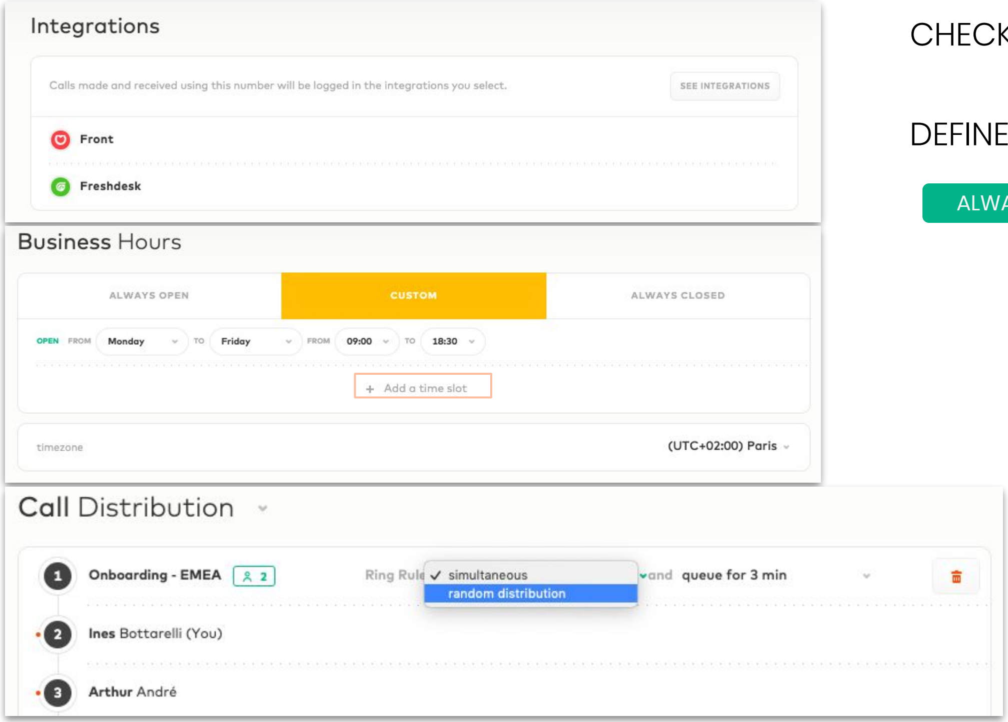
2 Numbers are grouped by country and listed in alphabetical order

3 Number's status: line is open, line is closed

4 Click on a number to open settings

5 Number's details

Configuring a classic number



CHECK if your number is linked to an **integration**

DEFINE and personalize your line's **business hours**

ALWAYS OPEN | CUSTOM | ALWAYS CLOSED

SET the right **time zone**

ESTABLISH a **call distribution** preference

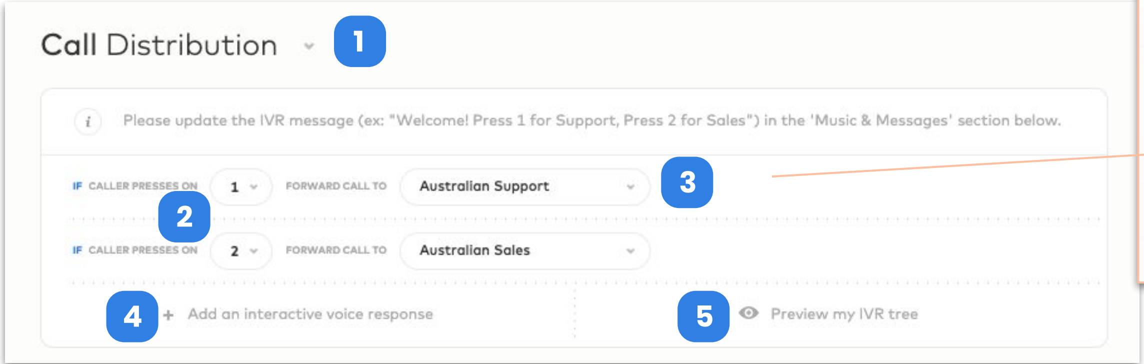
Simultaneously ring for all agents when receiving calls

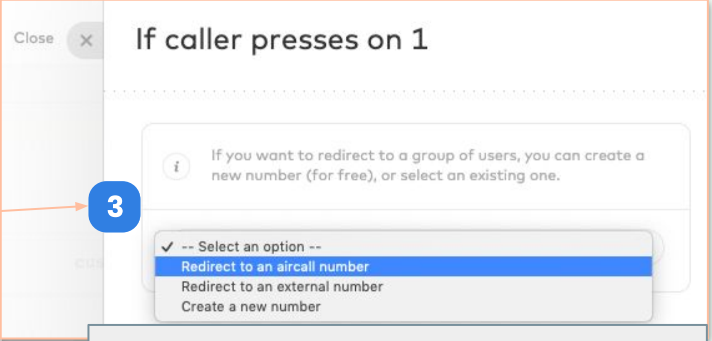
OR

Randomly selecting available agents to redirect an incoming call

Customers can queue for a duration of your choice if no agents are available

Configuring an IVR number

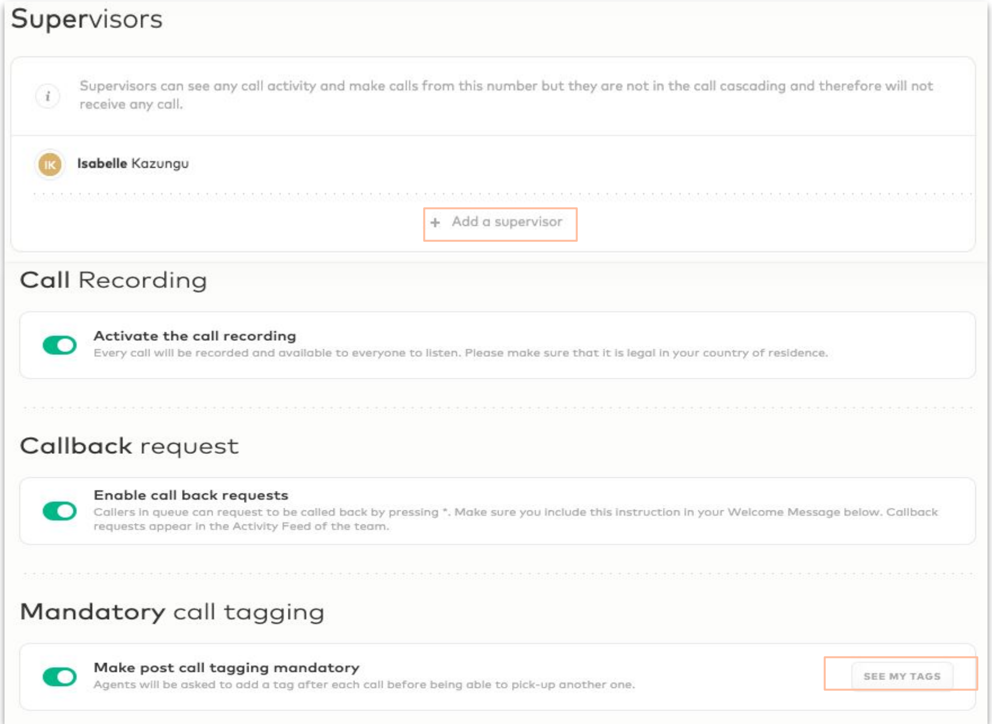




Here you can choose to:
a) direct the call to an **existing Aircall** number
b) direct the call to an **external phone** number
c) **create a new** Aircall number from scratch
(follow the process described in slide 6)

1. Click to switch to either classic or IVR mode
2. Click on the drop-down menu to select a different number
3. Click on the drop-down menu to select a different option
4. Click to add an extra IVR option
5. Click on to preview your built-up IVR tree

Configuring a number



Click to add more supervisors

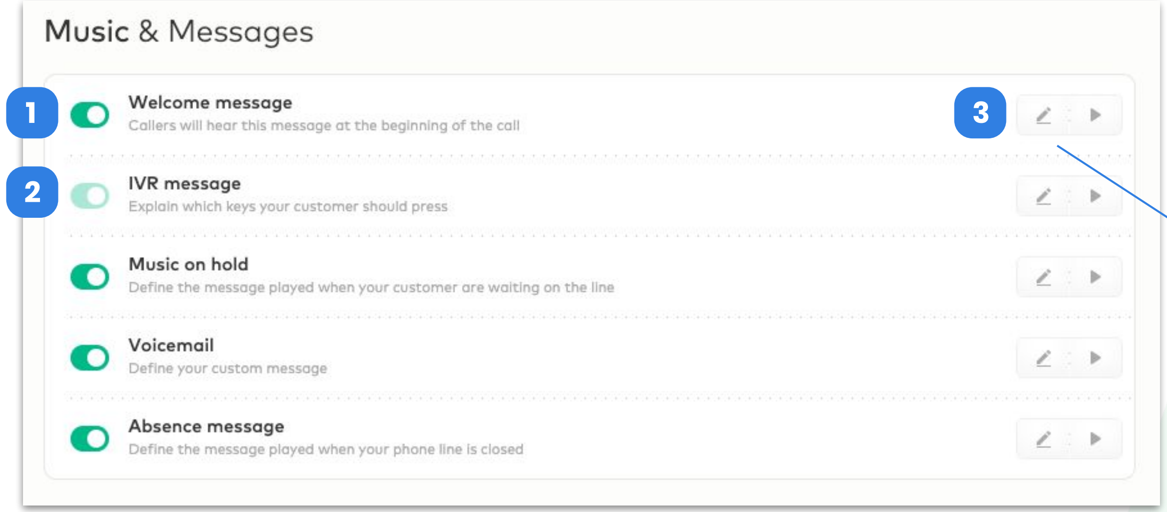
Any supervisor will be given the ability to use that phone number to **make outbound calls** (but won't be receiving any) and the ability to **follow its full activity** from the Phone App in the All calls section

Enable the **call recording** to be able to listen to the previous phone conversations
Note: the recording can be paused at anytime during a call

Give the option to your customers to be **called back** at a different time rather than waiting
Note: make sure to update your welcome message

Make sure your agents tag all their calls through the **mandatory call tagging** option
Note: agents will only be able to take/make the next call if they select a tag first

Configuring a number



3

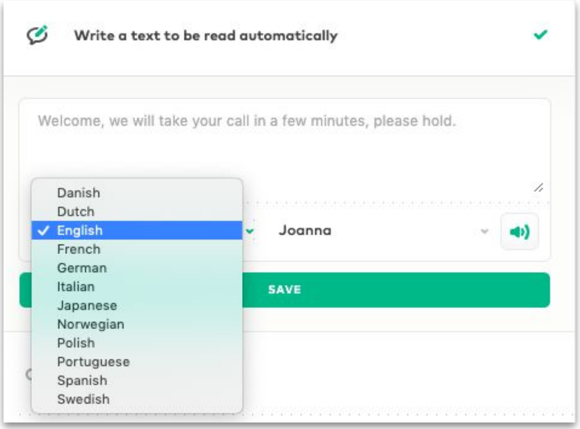
Click on the pen to **modify** your message
OR
play to **listen** to it

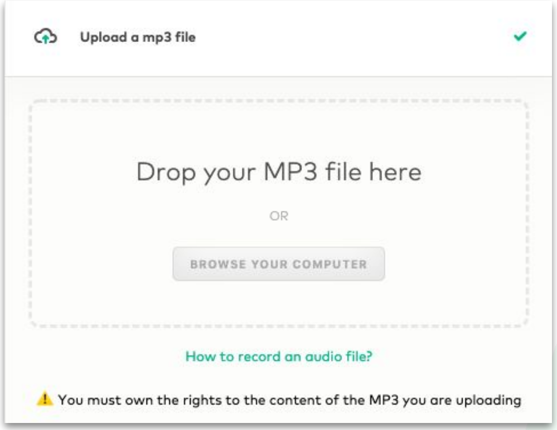
(see options in the next slide)

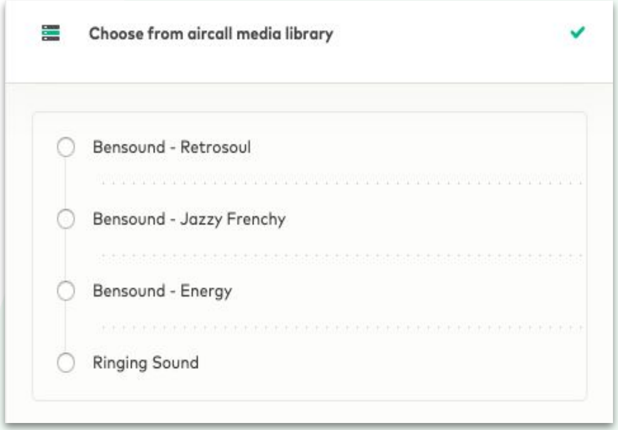
1 Click to **enable** the option/message

2 IVR message is **automatically enabled** and needs to be edited for the line to work

Configuring a number







A

Write your message to be read by one of our robots
Choose the language and the voice

B

upload your own recorded messages in mp3 format

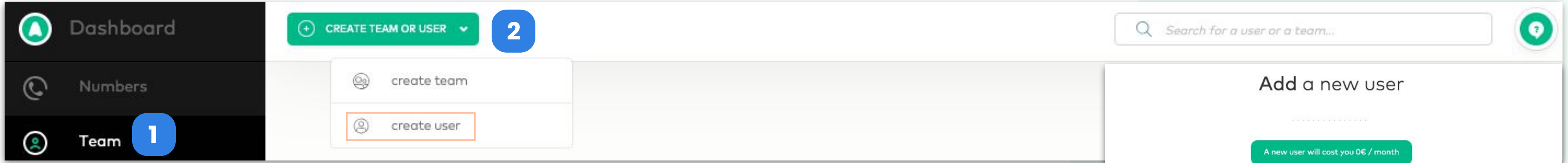
C

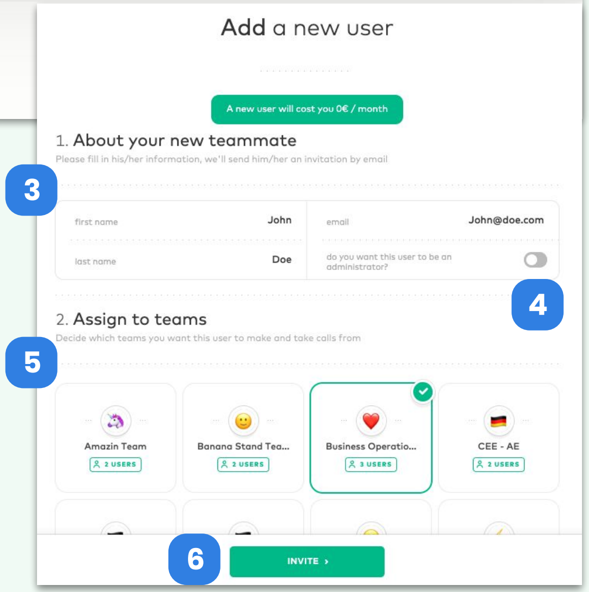
Choose your hold music from our selection list

Note: Don't forget to hit **SAVE** after selecting either of the options above

Adding and configuring users

Creating users & teams

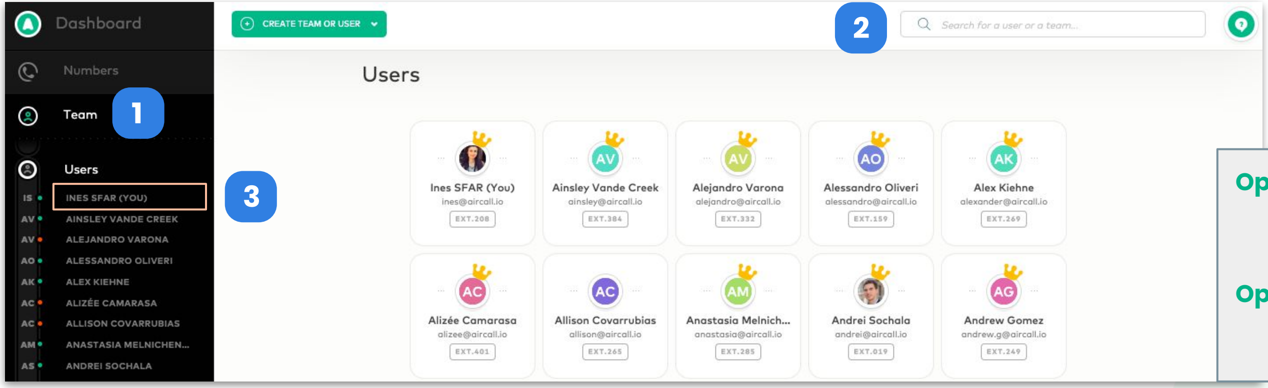




1. Click on **team** in the left sidebar menu
2. Click on **user** or **create a team**
3. Fill in the user's **first name**, **last name** and **email address**
4. Enable if you would like to set the new user to be an **Administrator**
5. Assign the new user to a **team**
6. Click **invite** to send a validation email

Note: If you need to add multiple users (10+) our Onboarding team can assist you

Configuring users



TWO ways to get to a user's profile:

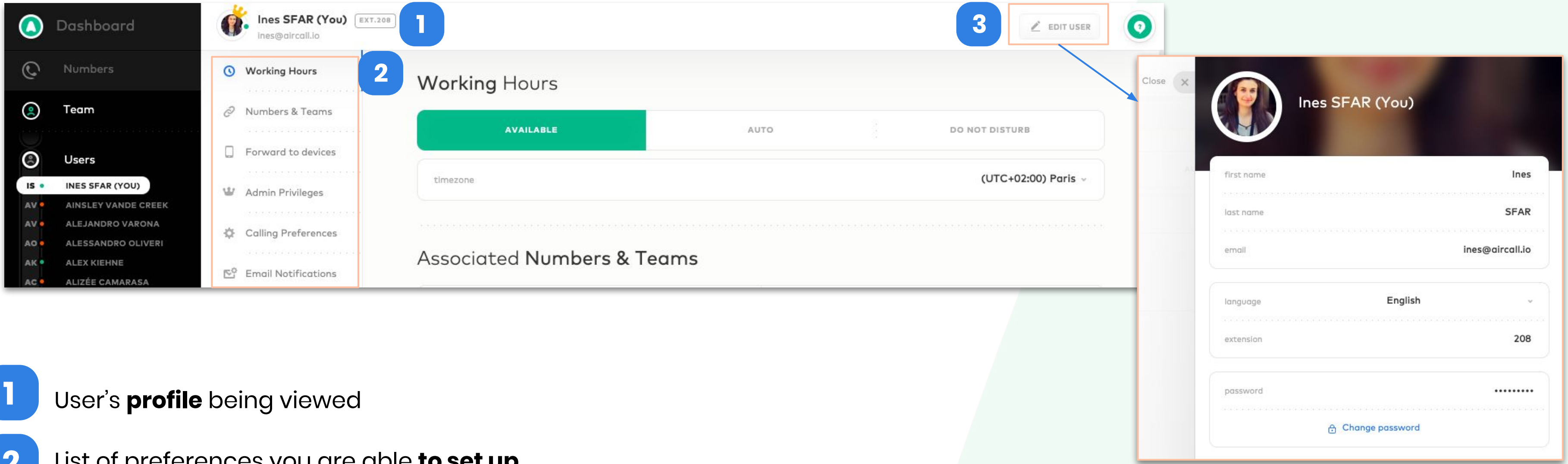
Option 1: - Click on team
- Search the name of the user
- Select an option from the suggestions

Option 2: - Click on team
- Select a user

As an Admin you are able to **configure** each of your **users' profiles**

1. Team Section
2. Search bar for team & users
3. Click on user's name to open the profile (see next slide)

Configuring users



1 User's **profile** being viewed

2 List of preferences you are able **to set up**

3 Click to change any **personal information** (name, email, language, password, ...)

Configuring users

1. Working hours defining the availability to receive calls

AVAILABLE | AUTO | DO NOT DISTURB

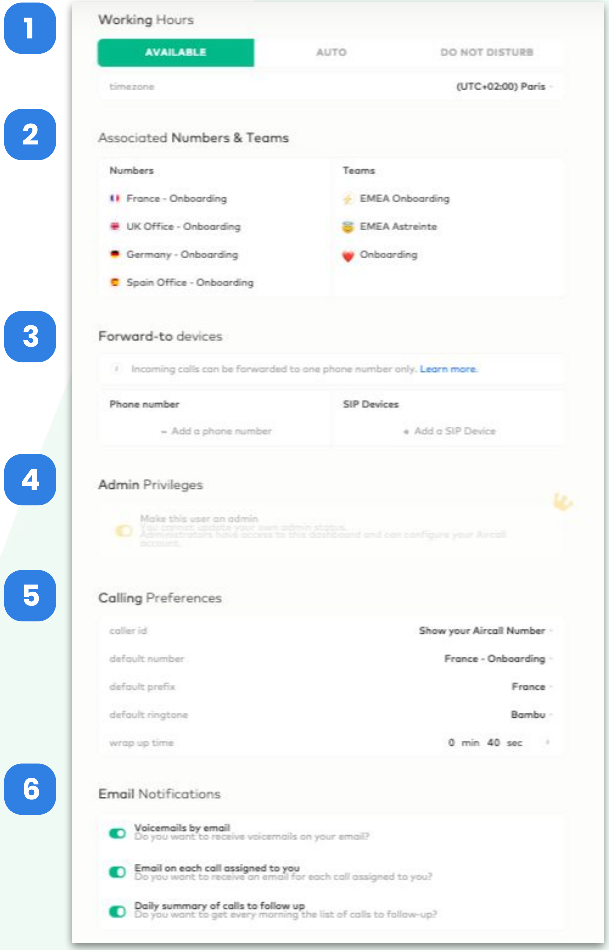
2. List of numbers that can be used and teams belonging to

3. Add an external phone number to activate the forwarding

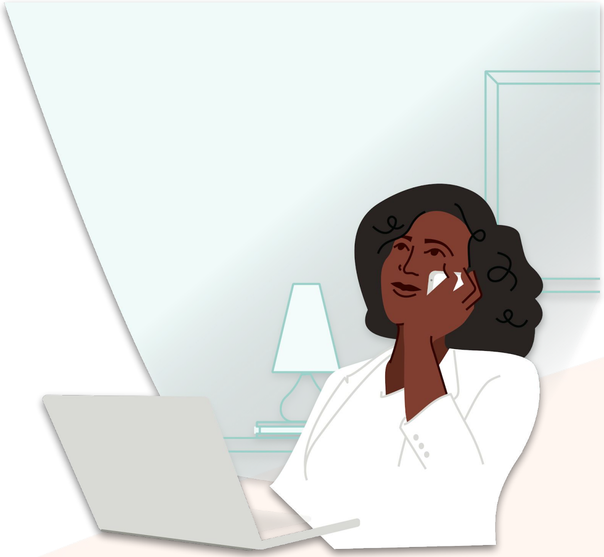
4. Enable to make the user an Admin

5. a) Define the number to display when activating the forwarding (incoming calls)
b) Set default number & country ISO
c) Choose a ringtone
d) Set an after-call unavailability

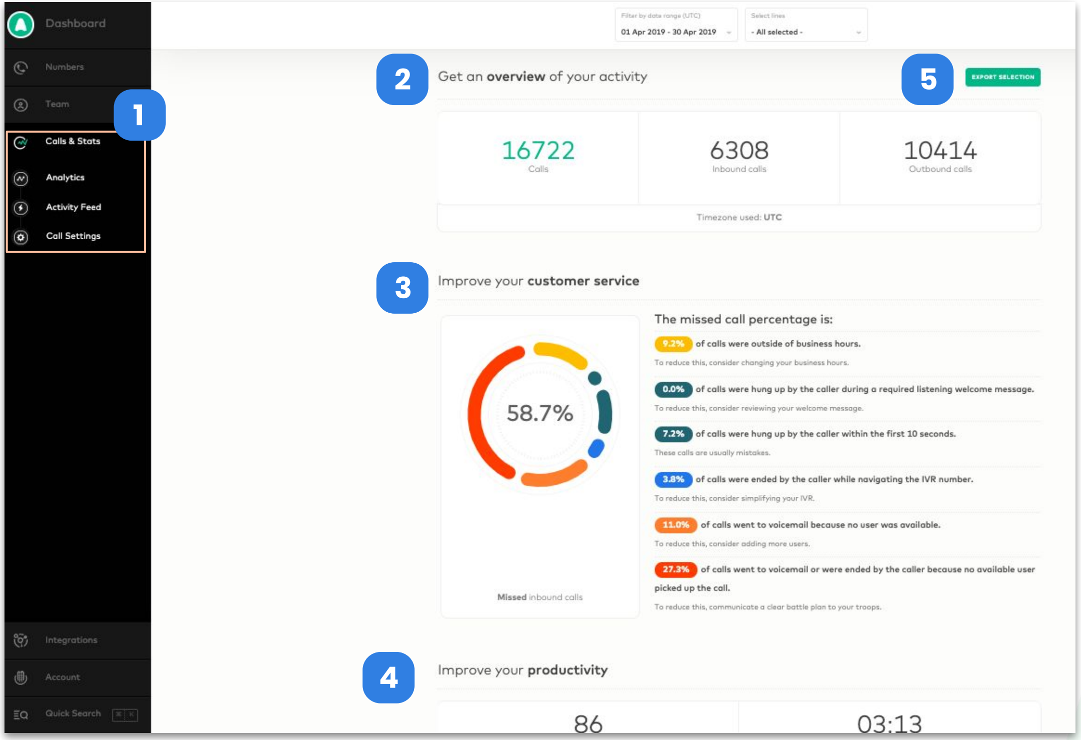
6. Enable to receive an email when s.o leaves a voicemail, assigns a call to you or for daily follow-ups



Reading Analytics



Calls & stats

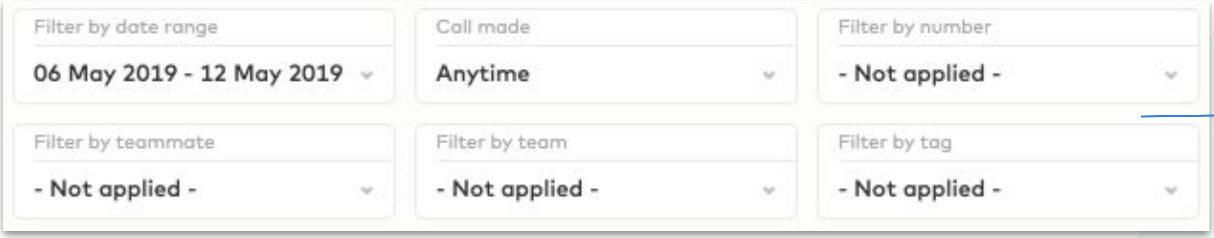


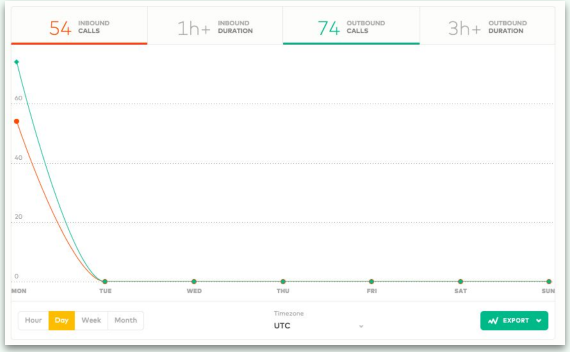
1. Calls & stats section
2. Overall activity of your lines
3. Detailed breakdown of missed calls
4. Average stats about users' activity
5. Click to export data and view details

Advanced analytics

The Advanced Analytics section is one of the main features of the **Professional** and **Custom plans**. They are located in the **Calls & Stats** section of the Dashboard.

Filters allow you to limit or modify the call data you wish to see, e.g. view a specific line or date range.





You can choose to see the graph by ***Hour***, ***Day***, ***Week*** *or* **Month** and select the ***timezone*** to filter the calls.

By clicking on the **Export** button on the bottom right you can choose to extract an Excel enclosing the **Graph data** or the **Raw data**. The Excel enclosing this information will be sent to the Admin's email.

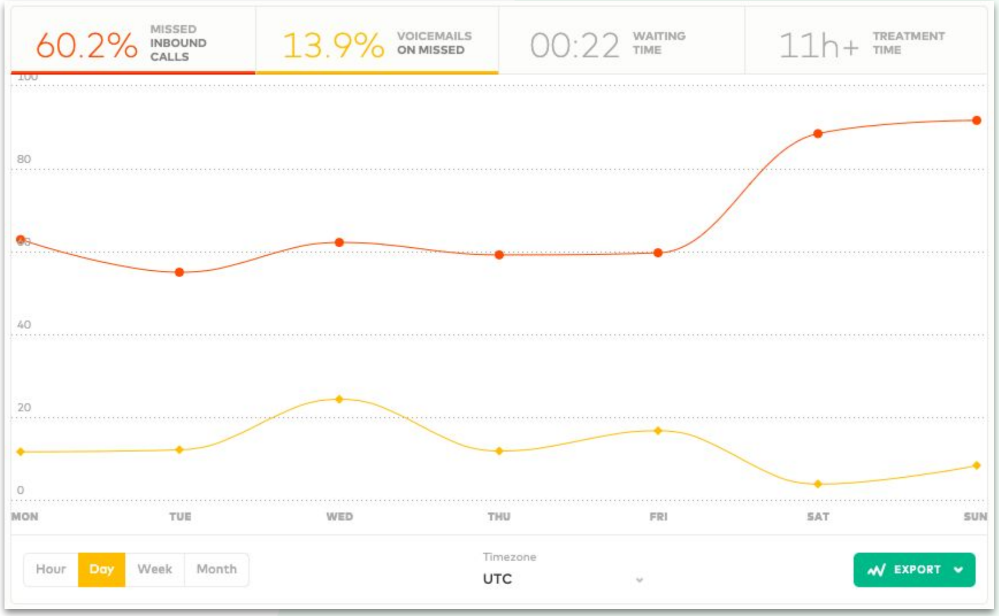
Advanced analytics - Activity

The activity section is composed of 4 main categories:

- ***Inbound calls*** - Number of inbound calls received on your lines.
- ***Inbound duration*** - Average total inbound call duration
- ***Outbound calls*** - Number of outbound calls made on your lines.
- ***Outbound duration*** - Average total outbound call duration.

Advanced analytics - Customer Service

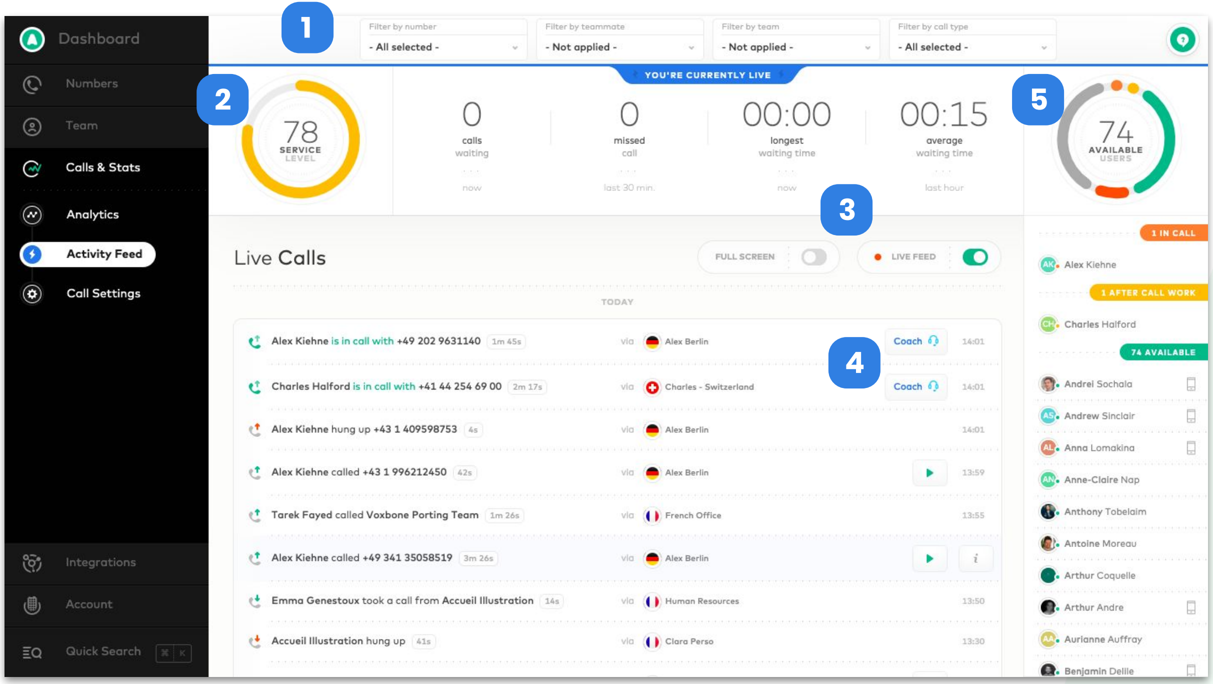
- ***% Missed calls*** - Missed calls on your lines.
- ***% Voicemails*** - Percentage of voicemails on your lines.
- ***Waiting time*** - Average amount of time (in seconds) callers have been in the queue before being answered.
- ***Treatment time*** - The time that takes for agents to take action on missed or assigned calls in their inbox. Archived calls are also included in the stats.



Advanced analytics -Productivity

- ***Inbound min/calls*** - Average number of inbound minutes per call.
- ***Inbound calls/user*** - Average number of inbound calls per agent.
- ***Outbound min/calls*** - Average number of outbound minutes per call.
- ***Outbound calls/user*** - Average number of outbound calls per agent.

Activity feed



1. Filter your live feed display
2. Set your service level and follow your team's performance
3. Enable to display
4. Whisper to your colleague without notifying the customer
5. Follow agents' statuses:

AVAILABLE

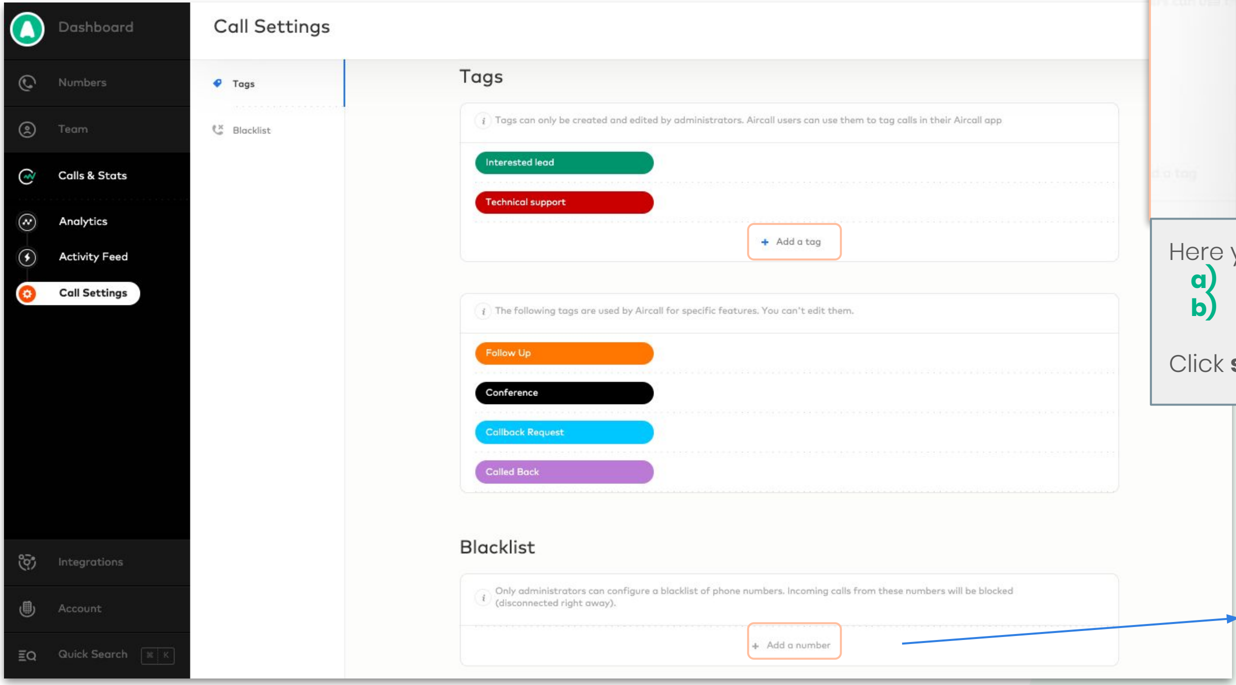
DO NOT DISTURB

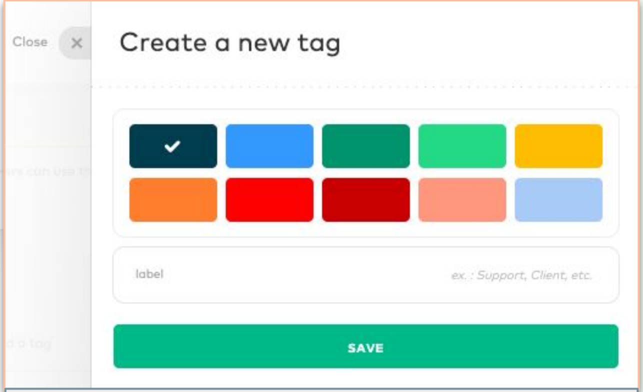
AFTER CALL WORK

OFFLINE

IN-CALL

Call Settings





Here you can **choose**:

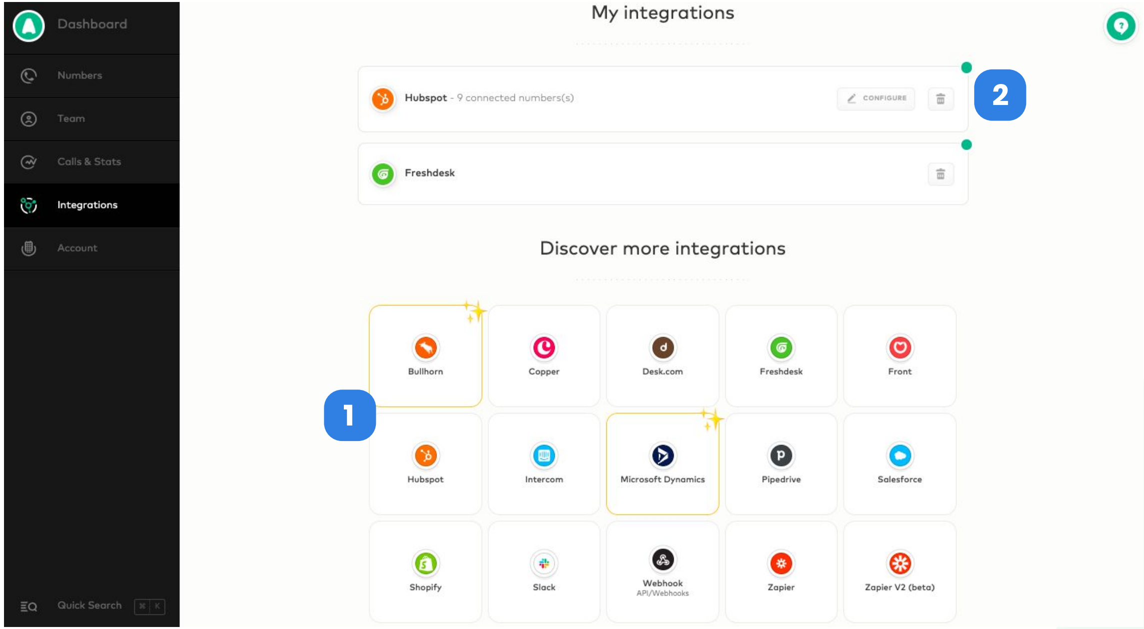
a) the color
b) the label

Click **save** and your tag will be added to the list.

Add all numbers from which you **don't** want to **receive calls**.

Activating integrations

Integrations



1 Click on any CRM or Helpdesk to **create** a new integration

2 **Manage** your integration by:
- a) activating or deactivating
- b) configuring (if available)
- c) deleting

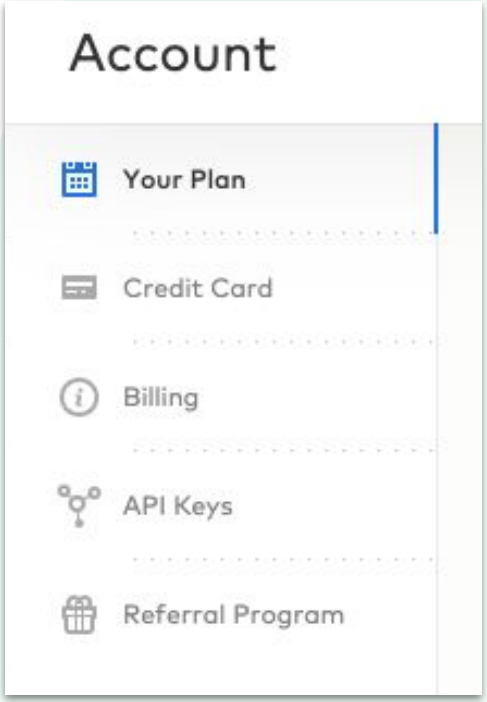
You have to **link** your integrations to numbers to enable the **synchronization**.

You can have **two or more** integrations from the **same CRM**

Managing your account

Account

1. Change your plan or check your bills
2. Verify or modify your credit card details
3. Update your billing information
4. View your list of active APIs
5. Refer Aircall to a friend and win a gift card



Contact your Account Manager if you have any doubts!

Need help?

Check our Help Center
help.aircall.io

Contact our Support Team
support@aircall.io

Thank you!

The phone system for modern business - **aircall.io**