



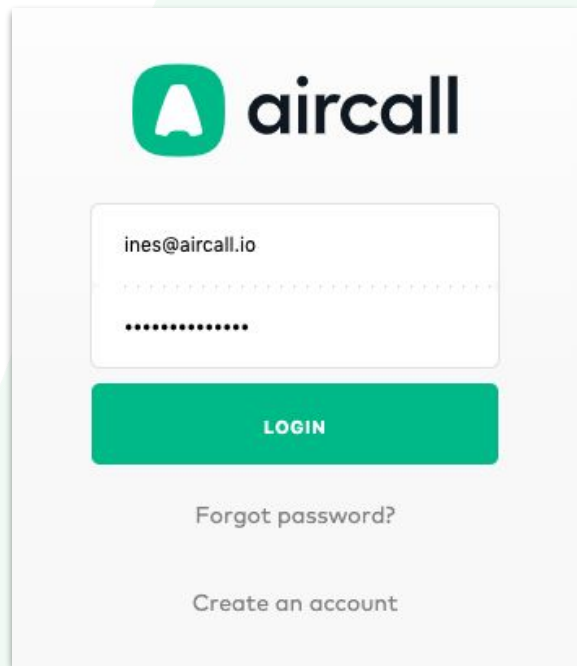
# The phone system for modern business.

Admin Onboarding Guide



# Access the dashboard

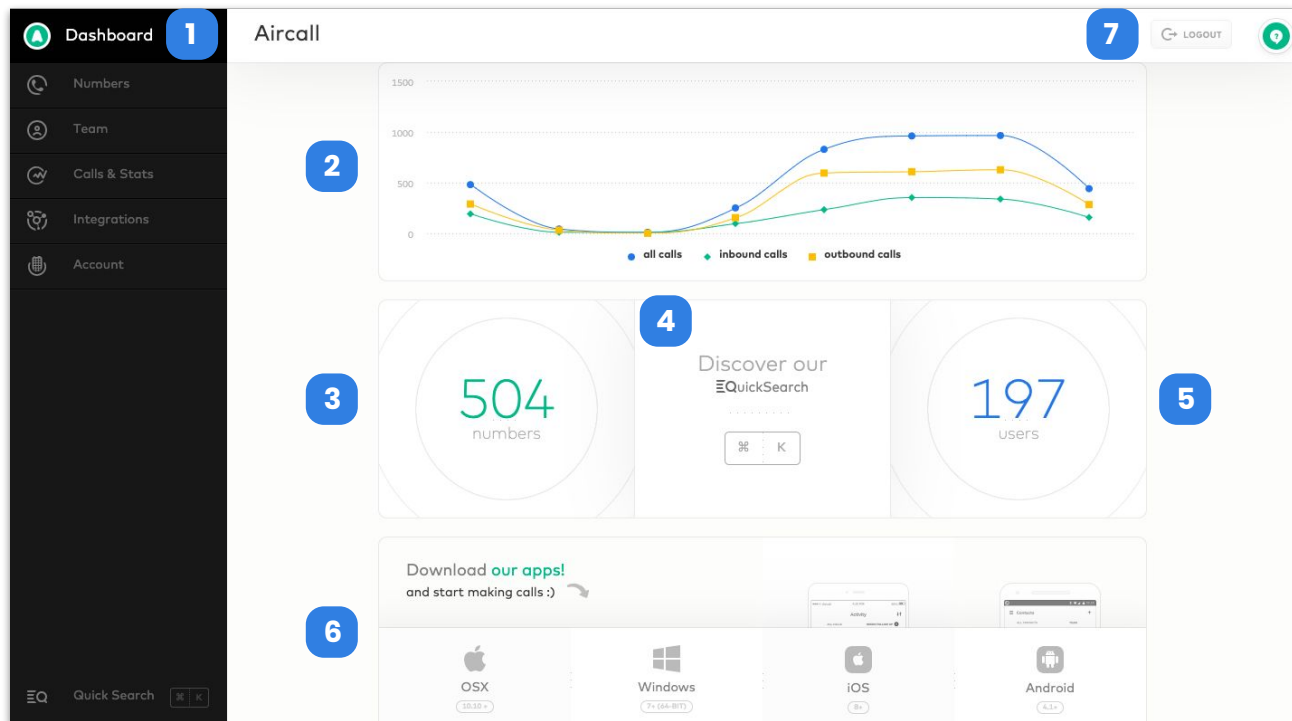
1. **Accept your invitation** request sent by email and follow the link to create your password
2. Go to [dashboard-v2.aircall.io](https://dashboard-v2.aircall.io)
3. **Login** with your professional email and password



The screenshot shows the Aircall login interface. At the top is the Aircall logo, consisting of a green circle with a white 'A' and the word 'aircall' in black. Below the logo is a white rectangular box containing two input fields. The first field has the text 'ines@aircall.io' and the second field is filled with dots, representing a password. Below these fields is a large green button with the word 'LOGIN' in white capital letters. Under the button are two links: 'Forgot password?' and 'Create an account', both in a smaller, grey font.



# Home page / Dashboard



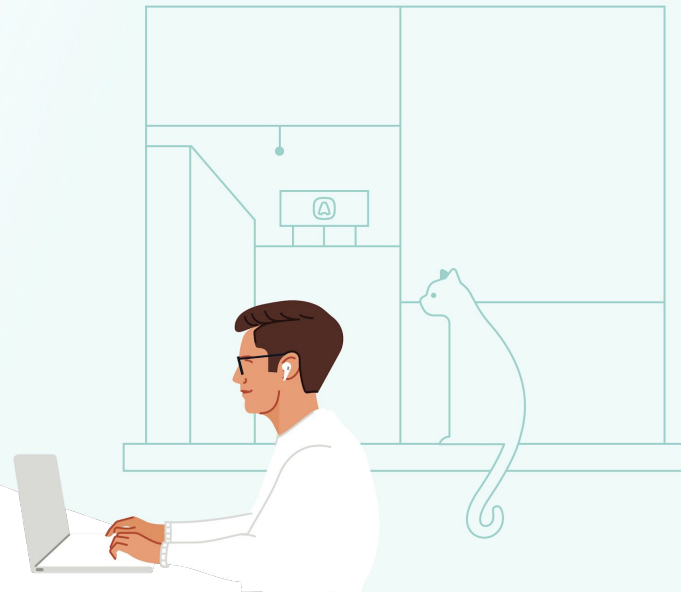
- 1 Dashboard sections
- 2 Overall performance graph
- 3 Total numbers on the account
- 4 Quick search bar
- 5 Total added users
- 6 Access Aircall Apps
- 7 Logout from the session



# Getting Started

All you need for happy calling!

1. Adding & configuring numbers ..... 5
2. Inviting users & creating teams ..... 14
3. Reading analytics ..... 19
4. Activating integrations ..... 27
5. Managing your account ..... 29



# Adding and configuring numbers



# Creating a new number

## Step 1

Click



**1. Name**

Please name your number

.....

ex.: Support, Sales France, etc.

**2. Location**

Decide from which country you would like your new number

Search for a country...

Argentina +54	Australia +61	Austria +43	Belgium +32	Brazil +55
------------------	------------------	----------------	----------------	---------------

**3. Great!**

In which part of the country will you need this number?

Search for an area...

Sydney +38	Melbourne +38	Brisbane +731
Adelaide +899	Perth +861	

**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

4. Choose a type

What kind of number?

Classic

A standard Aircall phone number

IVR

An automated menu for call routing

Or

NEXT

5. Assign to teammates

Decide who is going to make and take calls from this number

ines

Teams

Users

US Business

Ines SPAR (You)

6. Assign to integrations

Decide which integration should be triggered by this number

Zendesk - 8 connected numbers(s)

Salesforce - 191 connected numbers(s)

Intercom - 7 connected numbers(s)

Hubspot - 27 connected numbers(s)

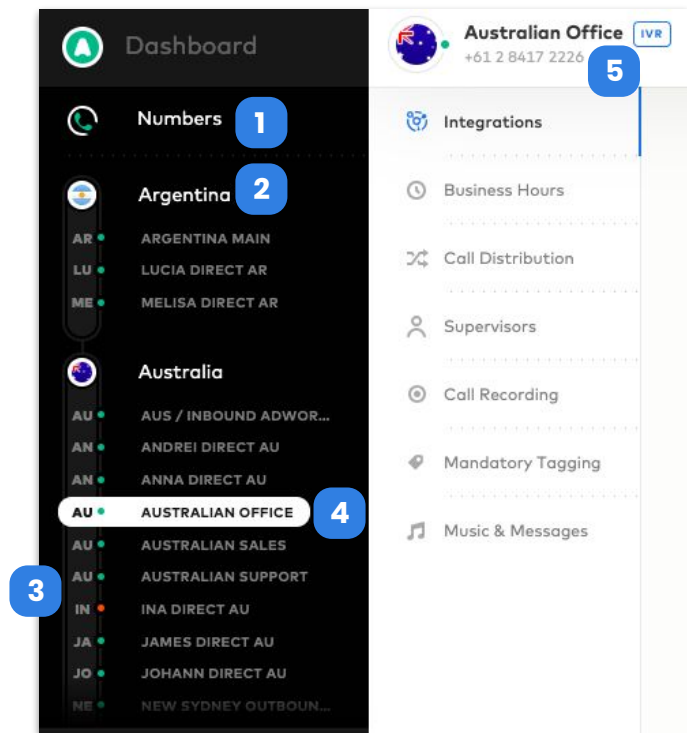
**DEFINE** the number type between classic or IVR

**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

The screenshot displays the Aircall configuration interface for a classic number. It is divided into three main sections:

- Integrations:** A section titled "Integrations" with a sub-header "Calls made and received using this number will be logged in the integrations you select." Below this, there are two integrations listed: "Front" (with a red heart icon) and "Freshdesk" (with a green heart icon). A "SEE INTEGRATIONS" button is located to the right.
- Business Hours:** A section titled "Business Hours" with three tabs: "ALWAYS OPEN", "CUSTOM" (which is selected and highlighted in yellow), and "ALWAYS CLOSED". Under the "CUSTOM" tab, there are fields for "OPEN FROM" (Monday) and "TO" (Friday), with time slots set to "09:00" and "18:30". There is a "+ Add a time slot" button. At the bottom, there is a "timezone" dropdown set to "(UTC+02:00) Paris".
- Call Distribution:** A section titled "Call Distribution" with a dropdown menu. Below the dropdown, there are three items listed: "1 Onboarding - EMEA" (with a green icon and a "2" in a green box), "2 Ines Bottarelli (You)" (with a red icon), and "3 Arthur André" (with a red icon). To the right of the list, there is a "Ring Rule" dropdown set to "simultaneous" (with a checkmark) and a "queue for 3 min" dropdown. A "random distribution" button is highlighted in blue.

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

OR

Simultaneously ring for all agents when receiving calls

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

Call Distribution 1

Please update the IVR message (ex: "Welcome! Press 1 for Support, Press 2 for Sales") in the 'Music & Messages' section below.

IF CALLER PRESSES ON 1 2 FORWARD CALL TO Australian Support 3

IF CALLER PRESSES ON 2 FORWARD CALL TO Australian Sales

4 + Add an interactive voice response

5 Preview my IVR tree

If caller presses on 1

If you want to redirect to a group of users, you can create a new number (for free), or select an existing one.

-- Select an option --

- ✓ Redirect to an aircall number
- Redirect to an external number
- Create a new 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


## Supervisors

 Supervisors can see any call activity and make calls from this number but they are not in the call cascading and therefore will not receive any call.


 Isabelle Kazungu

 Add a supervisor


## Call Recording


 **Activate the call recording**  
Every call will be recorded and available to everyone to listen. Please make sure that it is legal in your country of residence.

## Callback request

 **Enable call back requests**  
Callers in queue can request to be called back by pressing \*. Make sure you include this instruction in your Welcome Message below. Callback requests appear in the Activity Feed of the team.

## Mandatory call tagging

 **Make post call tagging mandatory**  
Agents will be asked to add a tag after each call before being able to pick-up another one.

 SEE MY TAGS

[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

Music & Messages

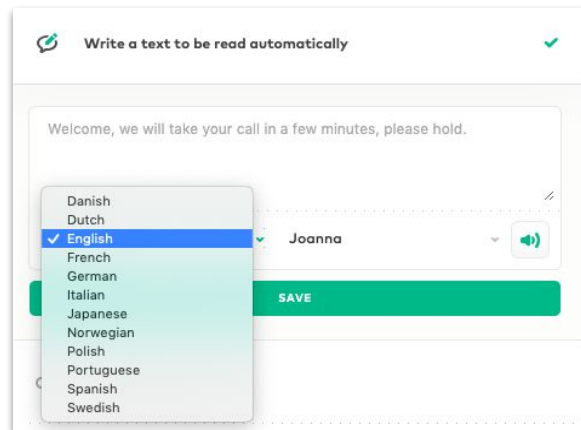
1	<input checked="" type="checkbox"/>	<b>Welcome message</b> Callers will hear this message at the beginning of the call	3	 
2	<input checked="" type="checkbox"/>	<b>IVR message</b> Explain which keys your customer should press		 
	<input checked="" type="checkbox"/>	<b>Music on hold</b> Define the message played when your customer are waiting on the line		 
	<input checked="" type="checkbox"/>	<b>Voicemail</b> Define your custom message		 
	<input checked="" type="checkbox"/>	<b>Absence message</b> Define the message played when your phone line is closed		 

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

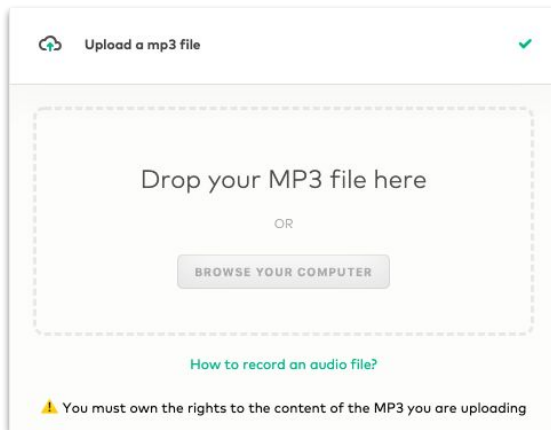


# Configuring a number



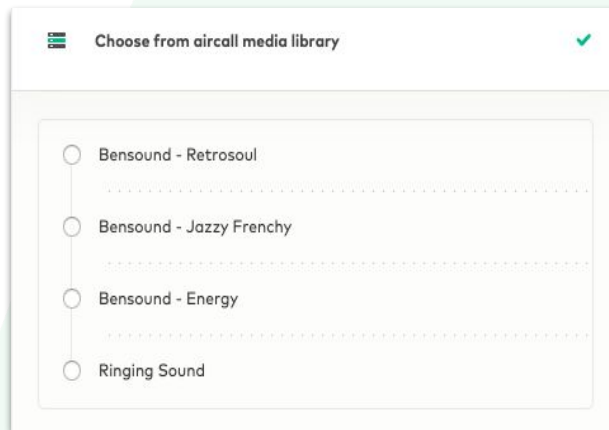
A

**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

Dashboard

Numbers

Team 1

CREATE TEAM OR USER

2

create team

create user

Search for a user or a team...

?

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

3

4

5

6

Add a new user

A new user will cost you 0€ / month

1. About your new teammate

Please fill in his/her information, we'll send him/her an invitation by email

first name John email John@doe.com

last name Doe do you want this user to be an administrator? ☐

2. Assign to teams

Decide which teams you want this user to make and take calls from

Amazon Team 2 users

Banana Stand Tea... 2 users

Business Operatio... 2 users

CEE - AE 2 users

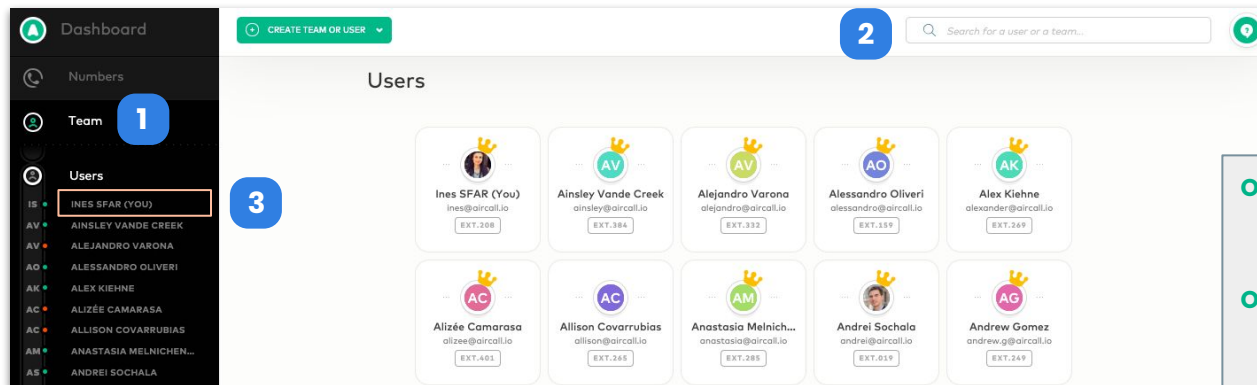
6 INVITE



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

The phone system for modern business – [aircall.io](https://aircall.io)

# 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

The screenshot shows the aircall.io user configuration interface. On the left is a dark sidebar with navigation links: Dashboard, Numbers, Team, and Users. The 'Users' link is active, showing a list of users with 'INES SFAR (YOU)' selected. The main content area is titled 'Ines SFAR (You)' and includes a sub-header 'Working Hours'. Below this is a list of preferences: Numbers & Teams, Forward to devices, Admin Privileges, Calling Preferences, and Email Notifications. A blue circle with the number '1' is placed over the user's profile header. A blue circle with the number '2' is placed over the 'Working Hours' section. A blue circle with the number '3' is placed over the 'EDIT USER' button in the top right corner. A blue arrow points from the 'EDIT USER' button to a modal window on the right. The modal window shows the user's profile with fields for first name, last name, email, language, extension, and password. The fields are pre-filled with 'Ines', 'SFAR', 'ines@aircall.io', 'English', '208', and a masked password. A 'Change password' link is at the bottom of the modal.

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



1

### Working Hours

AVAILABLE AUTO DO NOT DISTURB

timezone (UTC+02:00) Paris

2

### Associated Numbers & Teams

Numbers	Teams
France - Onboarding	EMEA Onboarding
UK Office - Onboarding	EMEA Astreinte
Germany - Onboarding	Onboarding
Spain Office - Onboarding	

3

### Forward-to devices

Incoming calls can be forwarded to one phone number only. [Learn more.](#)

Phone number	SIP Devices
+ Add a phone number	+ Add a SIP Device

4

### Admin Privileges

Make this user an admin  
Administrators have access to the dashboard and can configure your Aircall account.

5

### Calling Preferences

caller id	Show your Aircall Number
default number	France - Onboarding
default prefix	France
default ringtone	Bambu
wrap up time	0 min 40 sec

6

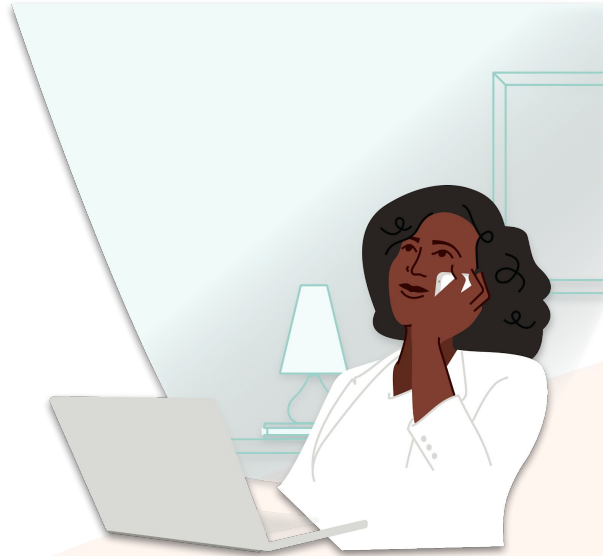
### Email Notifications

☒ Voicemails by email  
Do you want to receive voicemails on your email?

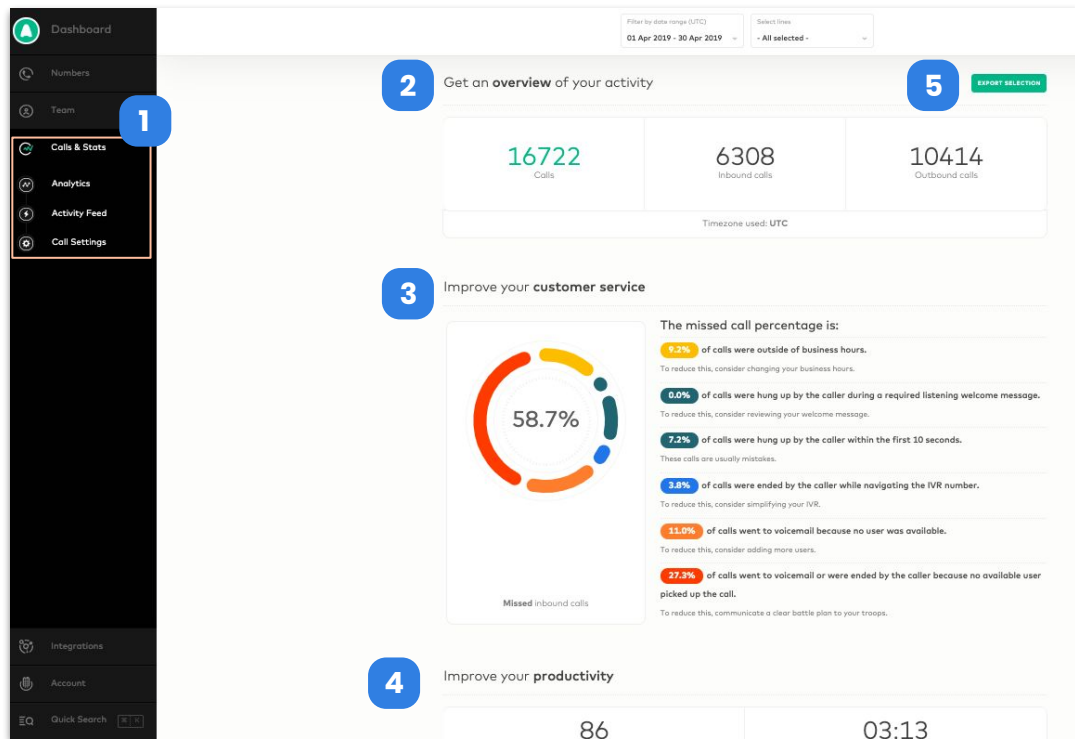
☒ Email on each call assigned to you  
Do you want to receive an email for each call assigned to you?

☒ Daily summary of calls to follow up  
Do you want to get every morning the list of calls to follow-up?

# 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

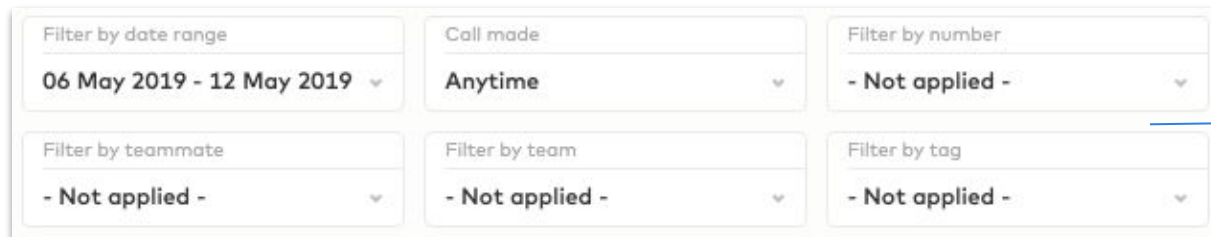
Click to export data and view details



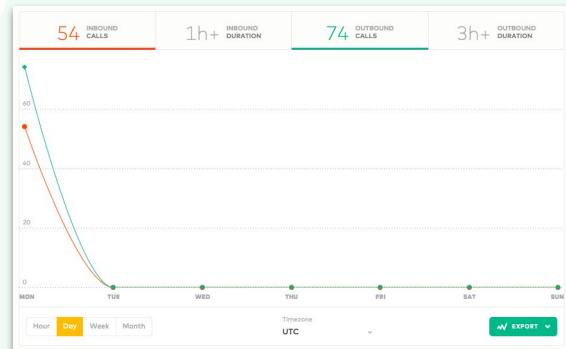
# Advanced analytics

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.



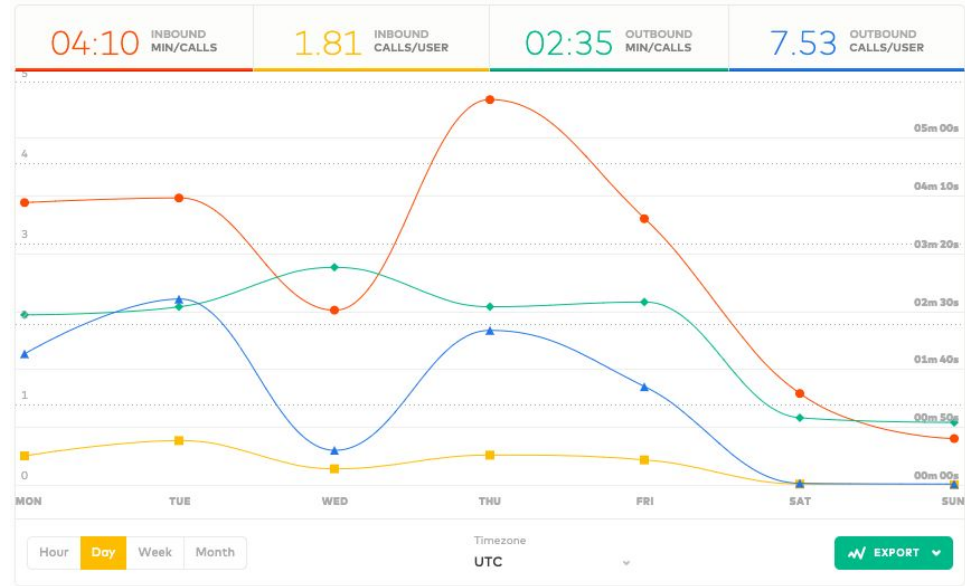
# Advanced analytics - Customer Service

- **% 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.



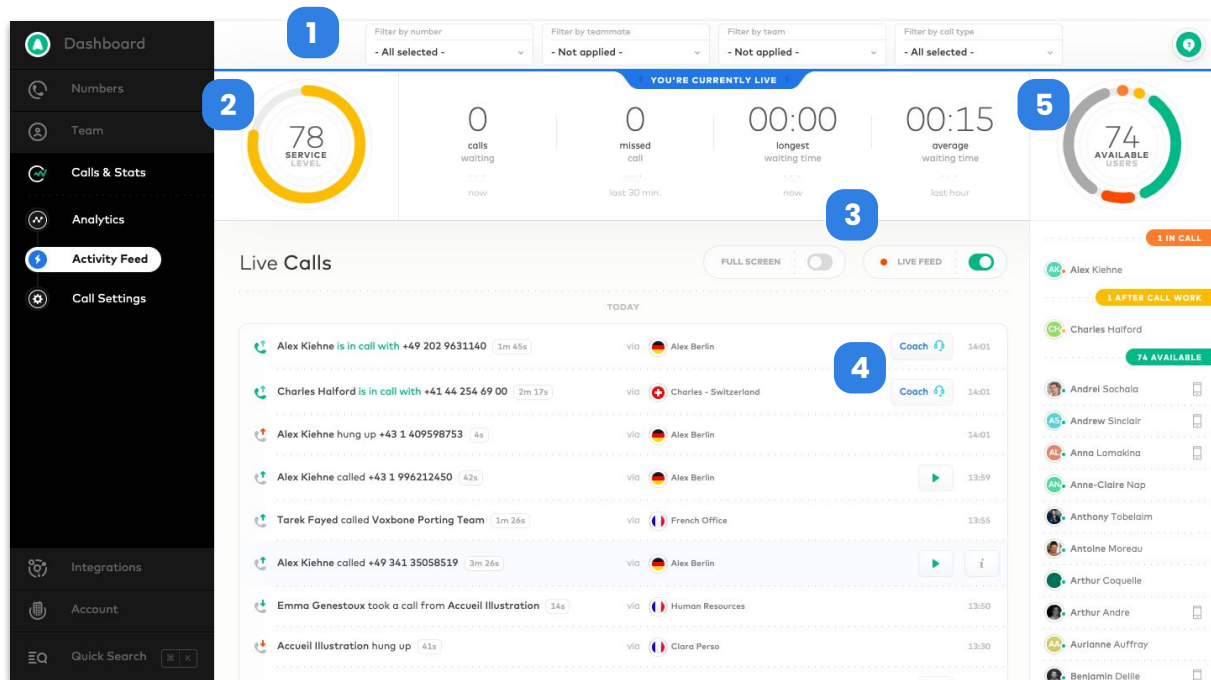
# Advanced analytics - Productivity

- **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

Dashboard

Numbers

Team

Calls & Stats

Analytics

Activity Feed

Call Settings

Integrations

Account

Quick Search

## Call Settings

Tags

Blacklist

Tags

Tags can only be created and edited by administrators. Aircall users can use them to tag calls in their Aircall app

Interested lead

Technical support

+ Add a tag

The following tags are used by Aircall for specific features. You can't edit them.

Follow Up

Conference

Callback Request

Called Back

Blacklist

Only administrators can configure a blacklist of phone numbers. Incoming calls from these numbers will be blocked (disconnected right away).

+ Add a number

Close X

### Create a new tag

Color selection grid:

- Dark blue (checked)
- Blue
- Dark green
- Light green
- Yellow
- Orange
- Red
- Dark red
- Light red
- Light blue

label ex.: Support, Client, etc.

SAVE

Here you can **choose**:

- a) the color
- b) the label

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

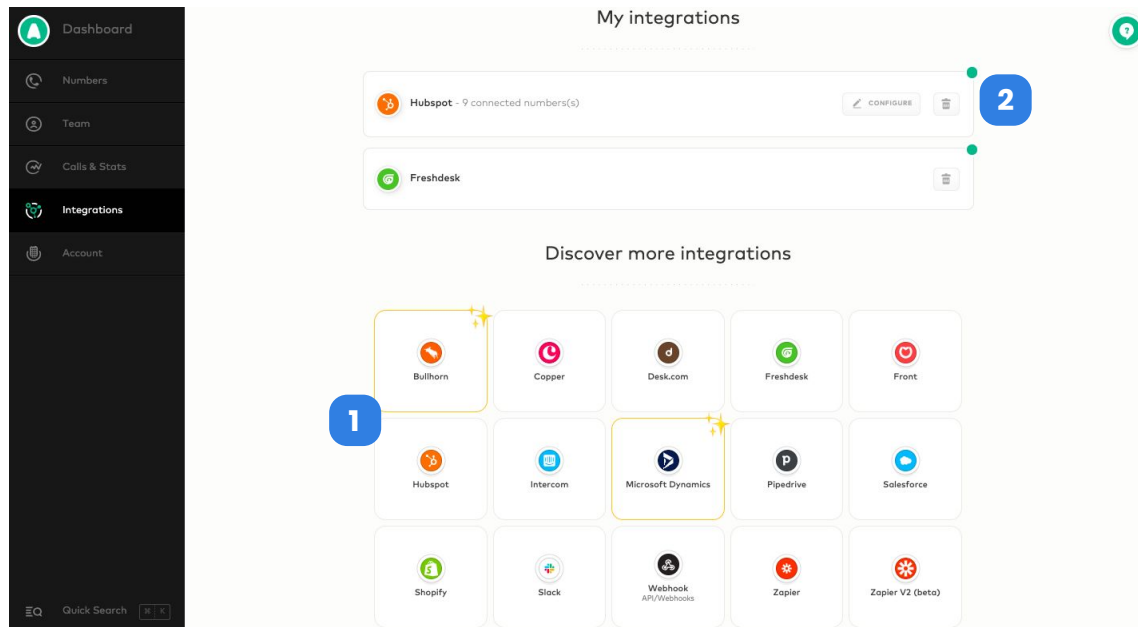
Add all numbers from which you **don't** want to **receive** calls.



# Activating integrations



# Integrations



1

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

2

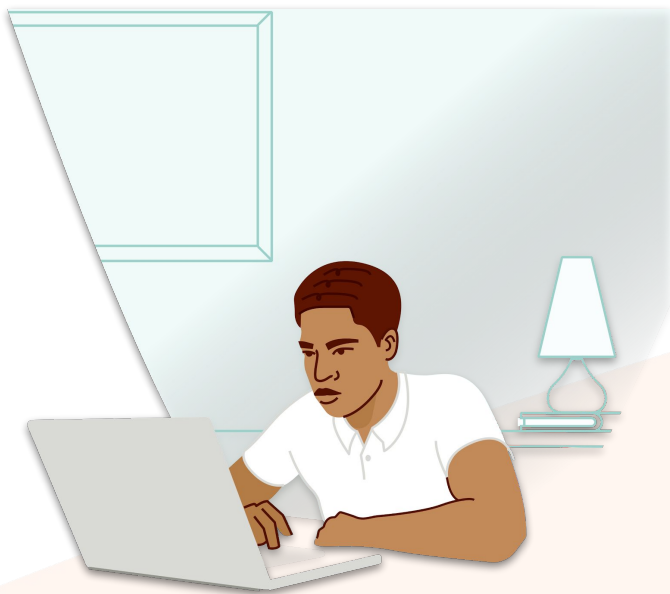
**Manage** your integration by:  
a) activating or deactivating  
b) configuring (if available)  
c) deleting

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

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



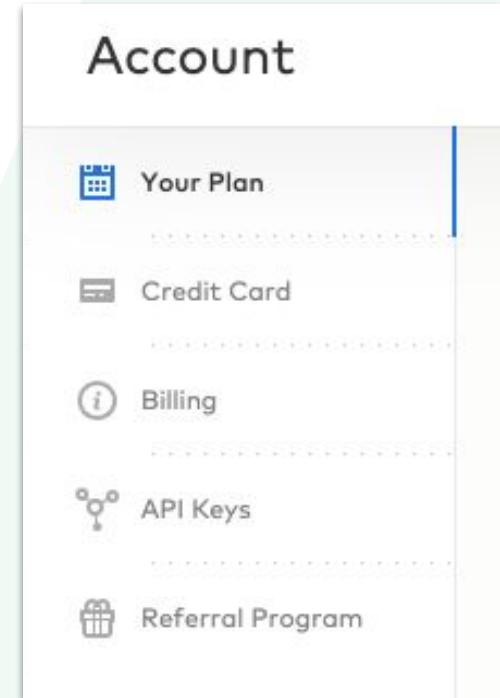
# Managing your account



# 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](https://help.aircall.io)

Contact our Support Team  
[support@aircall.io](mailto:support@aircall.io)





# Thank you!