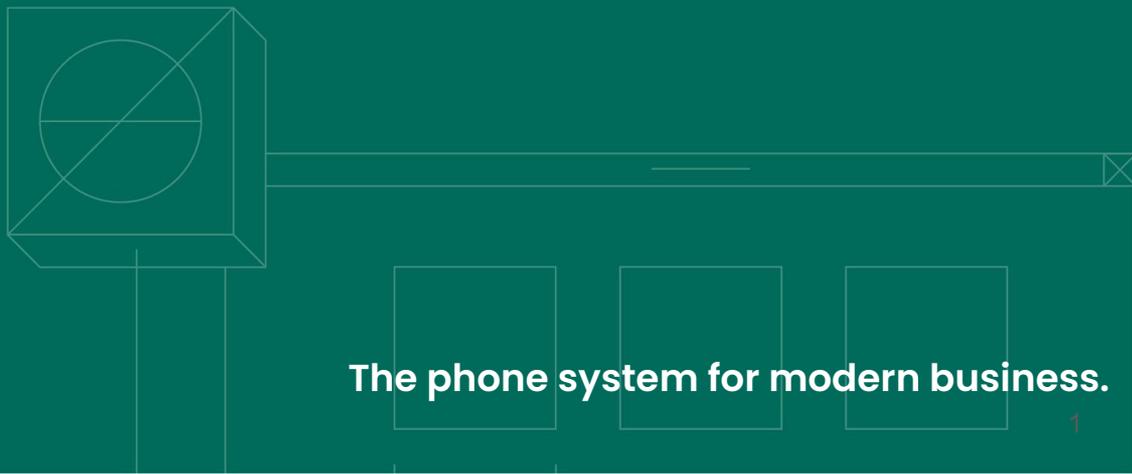




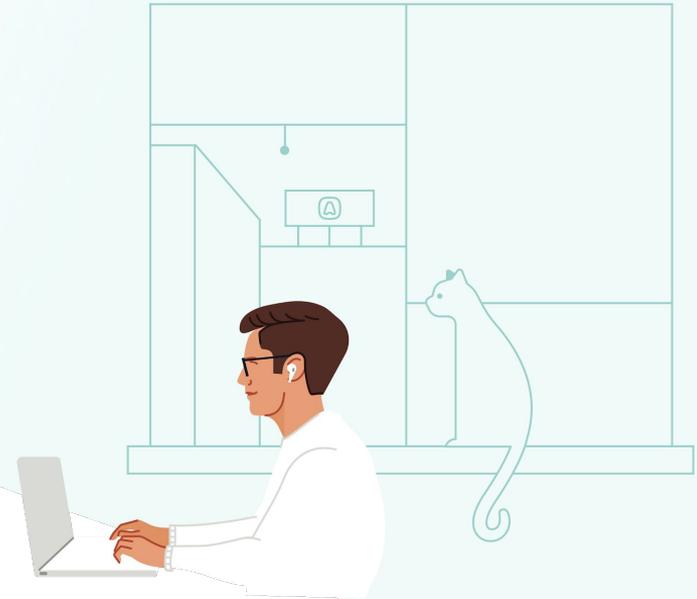
User Onboarding Guide



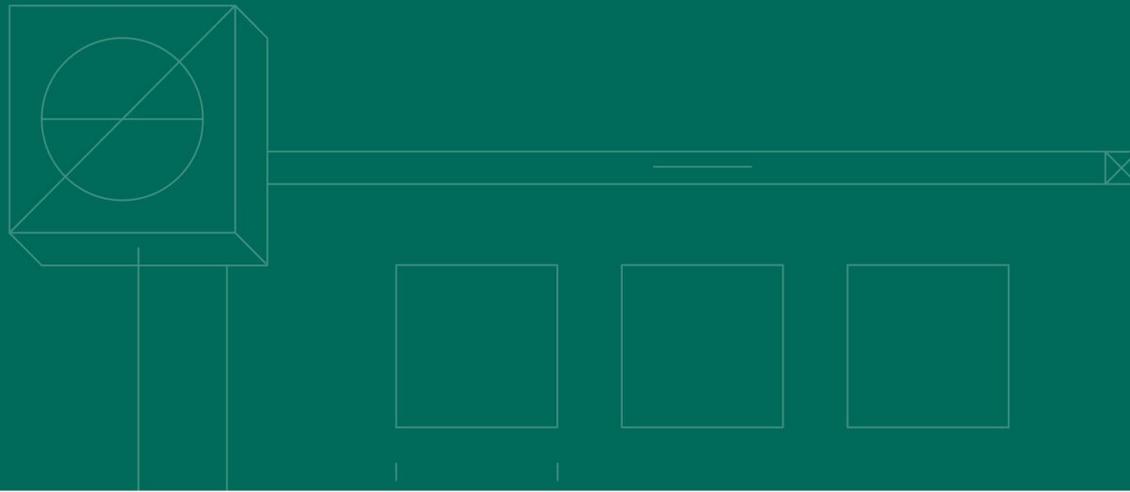
The phone system for modern business.

Table of Contents

1.	<u>Getting Started</u>	<u>3</u>
2.	<u>Getting to Know your Phone</u>	<u>8</u>
3.	<u>Making and Taking calls</u>	<u>16</u>
4.	<u>Managing your Call Activity</u>	<u>26</u>
5.	<u>Troubleshooting</u>	<u>31</u>
6.	<u>Index</u>	<u>36</u>



Getting Started



Prerequisites

Access the App

Test your Headset

The Phone App



Powerful Computer

Update your Windows, macOS & **Google Chrome*** (the most recent version)

64-bit version Windows 10 or MacOS 10.14

Intel i5 dual-core processor or equivalent + minimum 4Gb of RAM memory



Professional Headset

Use a USB **wired headset**

Avoid using bluetooth or wireless headset



VoIP optimized network

Use an **Ethernet cable** connection for increased bandwidth stability and superior call quality

Activate QoS (Quality of Service) on your Router

* For optimal performance, it's best to use the latest browser version. You can check [here](#) to see if your browser is up to date.

Prerequisites

Access the App

Test your Headset

The Phone App

1. Accept your invitation request sent by email and follow the link to create your password
2. [Download](#) the Desktop App or access the [Web App](#)
3. Login with your professional email and password
4. Select your Language
5. Test your headset and microphone



Sign in

Sign in

[Forgot password](#)

Language



Choose a language

English

Français

Español

Deutsch

Norsk

You can update your language from the settings

[Next](#)

Prerequisites

Access the App

Test your Headset

The Phone App

Use this new device for calls?



Jabra EVOLVE LINK (USB)

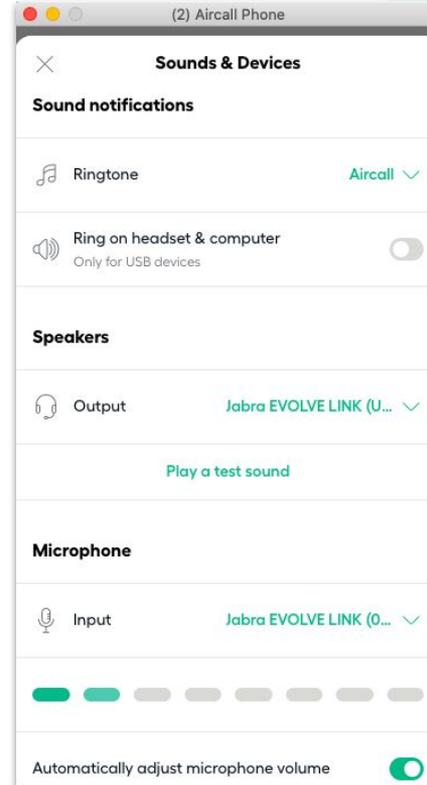
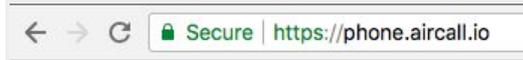
You can always change Audio preferences in Settings.

No, not now

Yes, let's use it



Make sure your **headset** is also **recognized** by **Chrome**



Choose your ringtone from the library

Make your app ring on speakers

Select your output device

Select your input device

Adjust your sound volume

Prerequisites

Access the App

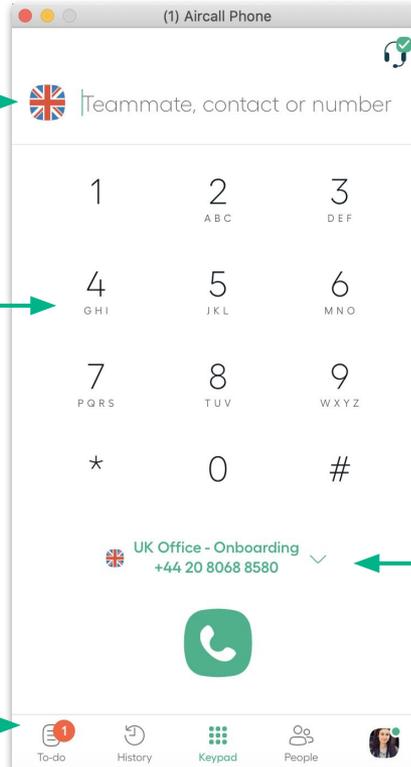
Test your Headset

The Phone App

Choose a **prefix**

Dial a number

Access the **To-Do** section



Check your **headset settings**

Type or paste a **phone number** or a **contact name**

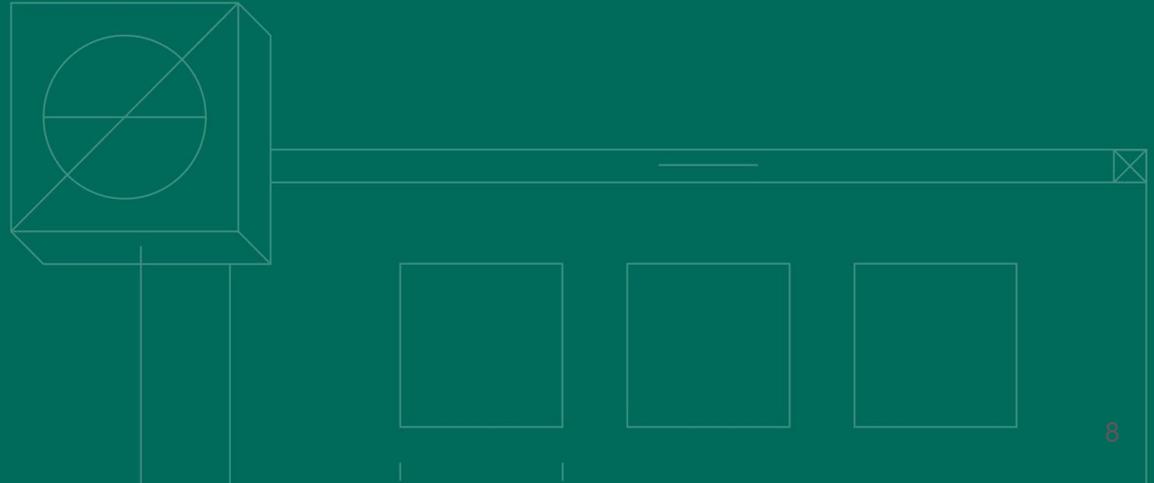
Choose the **line from which to call**

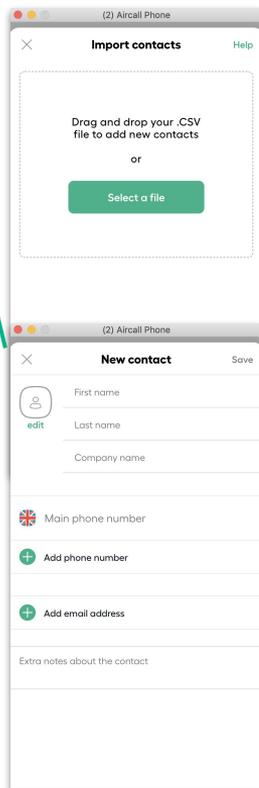
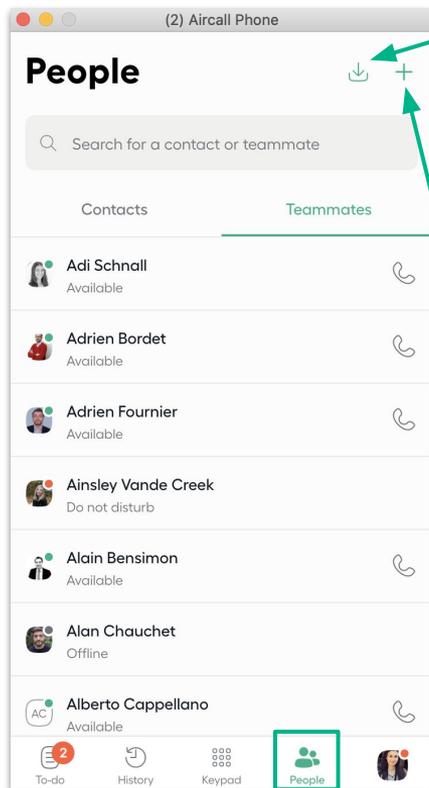
Access your Profile **settings**

Call **History**

People

Getting to Know your Phone



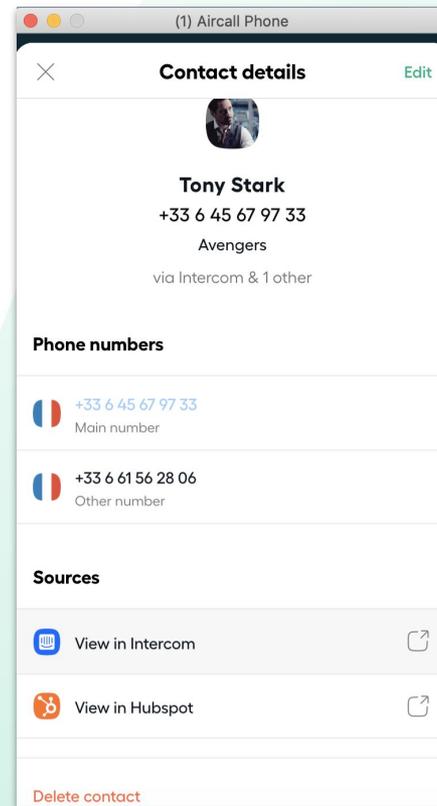


In the **People** section you can:

Manage your contacts
(import, create, edit & delete)

&

Use your agenda to **call your teammates** and check their availability



Managing
Contacts

Viewing
Setting
Options

Managing
Availability

Defining
Working
Hours

Defining
Account
Settings

Defining
Call
Preferences

Setting Email
Notifications

Manage your profile & see your general information

Identify your audio devices

Set up your calling preferences

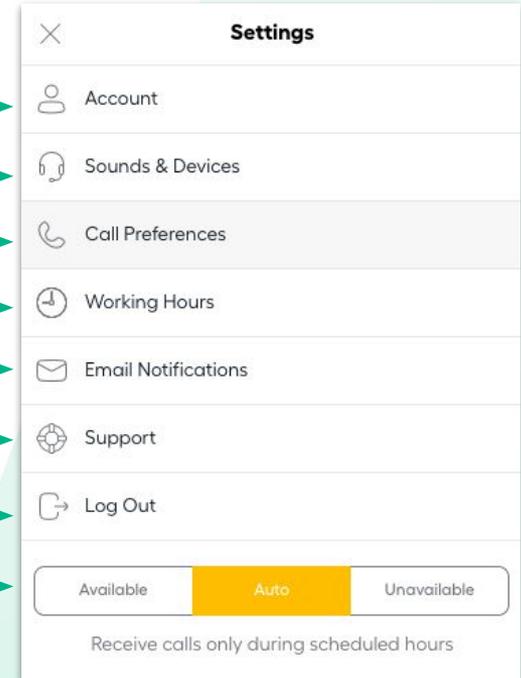
Set up your own working hours

Enable email notifications for pending calls

Access the knowledge base & chat with the support team

Log out from your Account profile

Manage your availability



Managing
Contacts

Viewing
Setting
Options

Managing
Availability

Defining
Working
Hours

Defining
Account
Settings

Defining
Call
Preferences

Setting Email
Notifications

AVAILABLE

Receive calls when the numbers you are to assigned are open

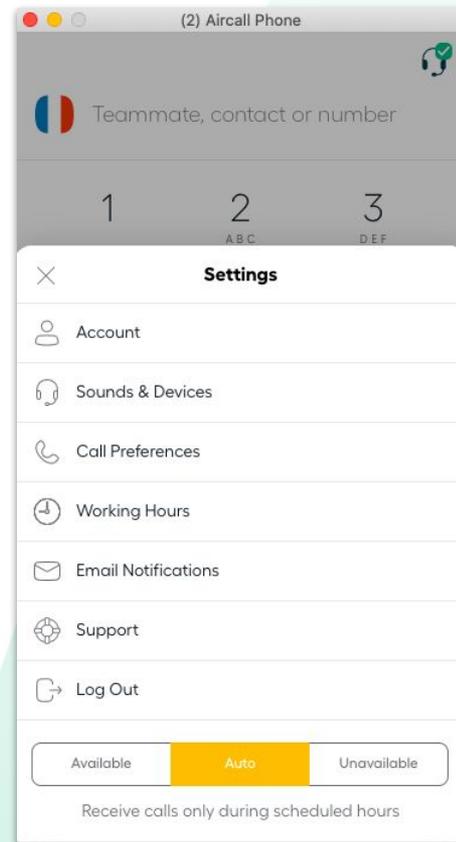


AUTO

Receive calls within your **working hours** (to be defined in settings)

DO NOT DISTURB

Never receive calls



Managing
Contacts

Viewing
Setting
Options

Managing
Availability

Defining
Working
Hours

Defining
Account
Settings

Defining
Call
Preferences

Setting Email
Notifications

Receive calls when you are **scheduled to work**.

Make sure the **time zone** is properly selected on the top right.

You must set your availability status to **AUTO**.

If you are within in your **working hours** but the phone lines are closed, you won't receive any calls.

✕ **Working hours**

Timezone

Your timezone (UTC+01:00) Paris ▾

You'll be available:

From 09:00 to 12:30 >
every weekday

From 14:00 to 18:30 >
Mon, Tue, Wed, Thu

+ Add a time slot

Managing Contacts

Viewing Setting Options

Managing Availability

Defining Working Hours

Defining Account Settings

Defining Call Preferences

Setting Email Notifications

Account

Elizabeth Mejia
Aircall
[Edit](#)

Credentials

elizabeth.mejia@aircall.io
Email

.....
Password [Change](#)

Language

English [Select](#)

Teams

- EMEA Onboarding
6 members
- spain ONB
2 members

Edit your first and last name

Set your new password

Set your language

Teams you have been included in

List of numbers you have been assigned to

Receive your calls on your personal mobile

Disconnect from all devices

Account

- Ines FR
+33 1 76 44 10 35
- Dutch Office - Onboarding
+31 85 888 0550
- Aircall Argentina - Support
+54 351 535 0128
- Astreinte Colombia
+57 1 5085817
- Astreinte NZ
+64 9 801 8043
- IVR test channel
+32 50 58 04 85

[Forward calls to a number](#) [Learn more](#)

Add phone number

[Log out from all sessions](#)

Managing Contacts

Viewing Setting Options

Managing Availability

Defining Working Hours

Defining Account Settings

Defining Call Preferences

Setting Email Notifications

Make your app pop-up on top of your open tabs

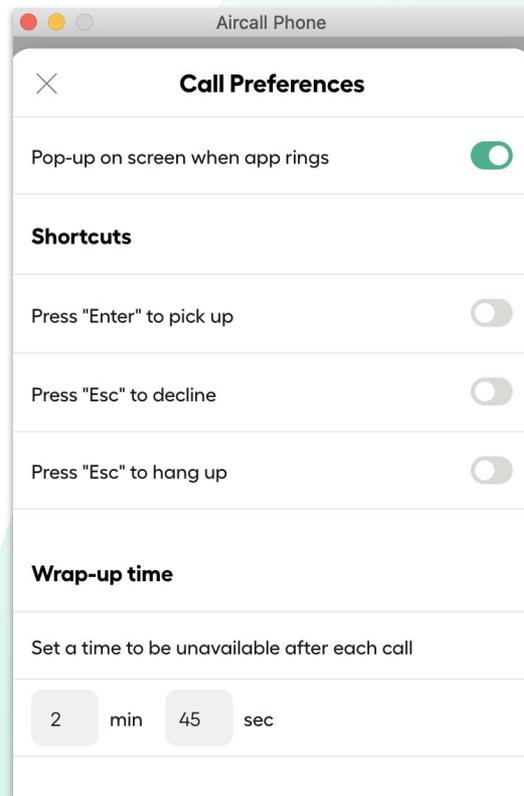
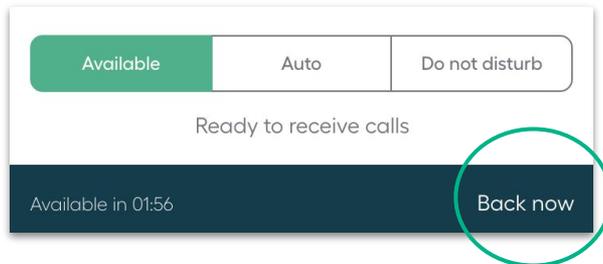
Activate keyboard shortcuts for quicker interactivity.

Set your Wrap-up time



Click

Don't wait for your next call,
Click **BACK NOW**

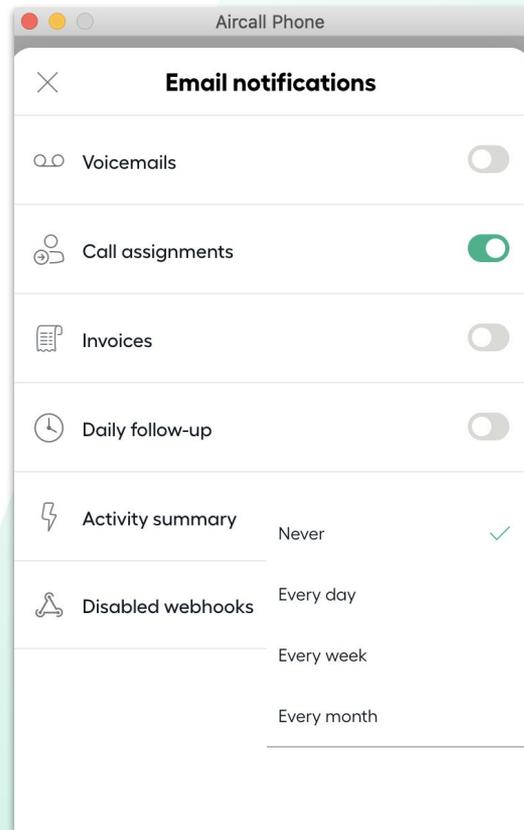


Activate the setting and get notified by email for:

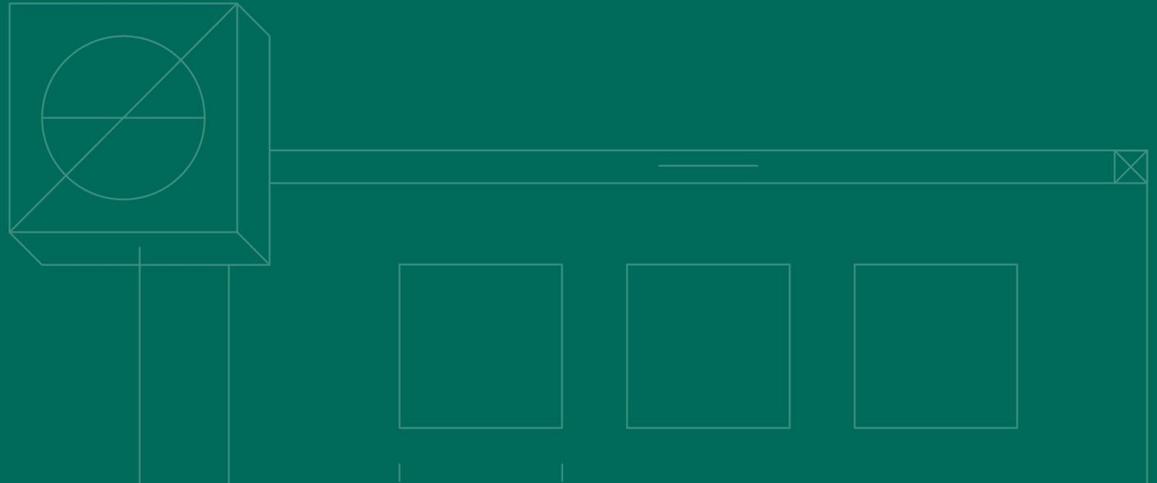
- voicemails
- call assignments
- invoices (**only Admin**)
- daily follow-ups
- Activity summary (**only Admin**)
- A webhook is deactivated (**only Admin**)

Daily follow-up is an emailed list of missed calls and voicemails that have not yet been handled.

Activity summary is for all aircall lines and is available only for Admins. You can choose the frequency of the report.



Making & taking phone calls



Defining Outbound Calling Options

Receiving a call

Making a call

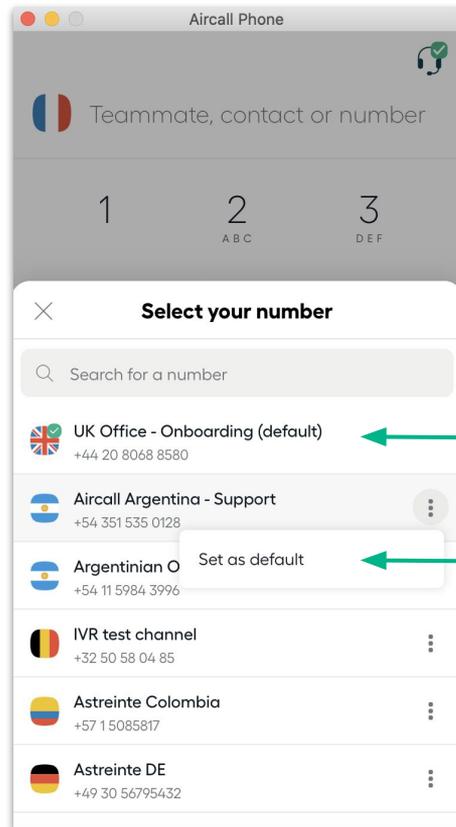
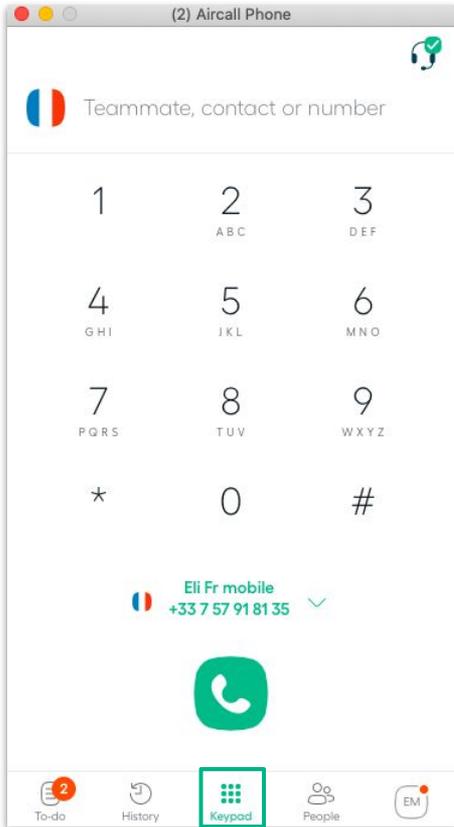
Viewing In-Call Features

Transferring a Call

Transferring - Warm Transfer

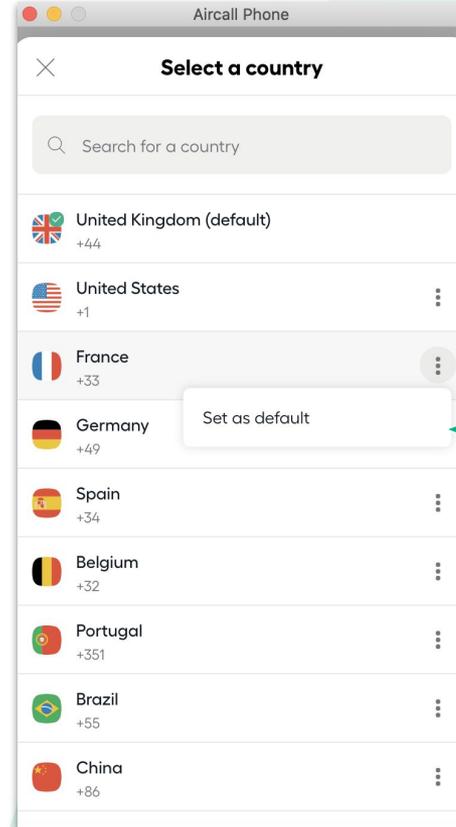
Conferencing & Parallel Calling

Ending a Call



Current default number

Click to select as default



Current default country code

Click to select as default

Defining
Outbound
Calling
Options

Receiving
Calls

Making
Calls

Viewing
In-Call
Features

Transferring
a Call

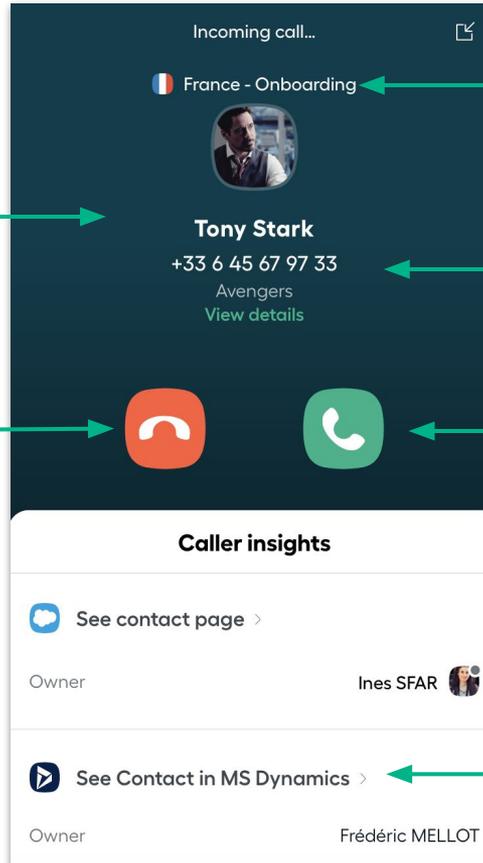
Transferring
-Warm
Transfer

Conferencing &
Parallel Calling

Ending
a Call

Contact name

Decline a call



Incoming call...

France - Onboarding



Tony Stark

+33 6 45 67 97 33

Avengers

View details



Caller insights

See contact page >

Owner

Ines SFAR

See Contact in MS Dynamics >

Owner

Frédéric MELLOT

Line being rung

Contact details

Pick-up a call

Open Contact profile on
your CRM or Helpdesk

1. Dial your number using:

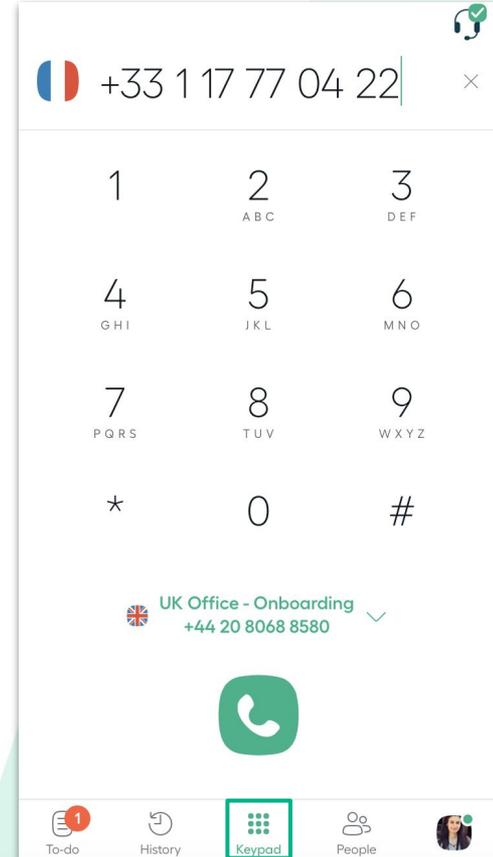
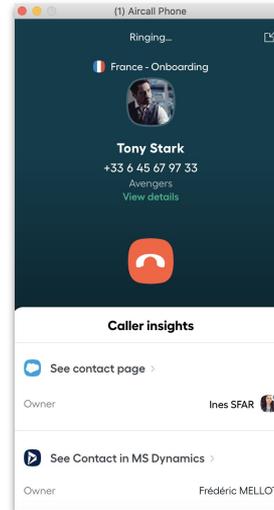
- your keyboard
- aircall keyboard
- chrome extension “[Click-to-dial](#)”

OR

Type the name of the person you want to reach

2. Click the green button

3. Happy calling!



Defining
Outbound
Calling
Options

Receiving
Calls

Making
Calls

Viewing
In-Call
Features

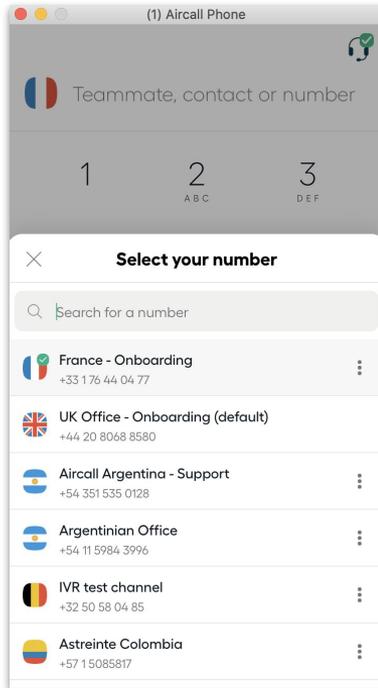
Transferring
a Call

Transferring
-Warm
Transfer

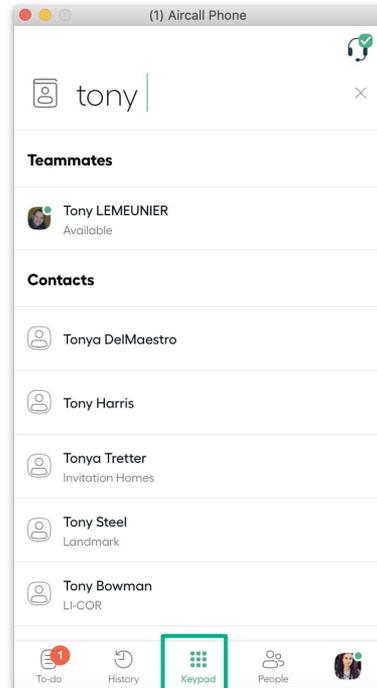
Conferencing &
Parallel Calling

Ending
a Call

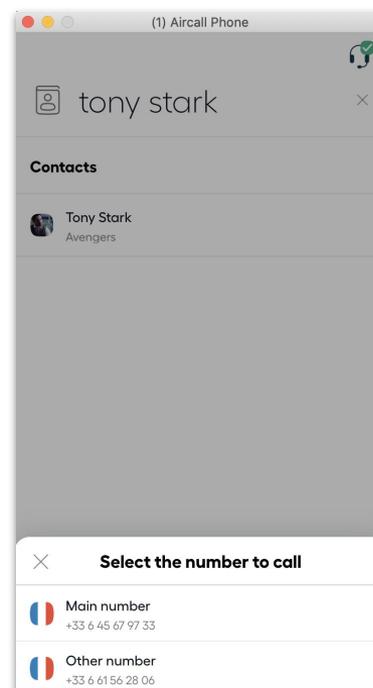
Select a line to call from if different from default



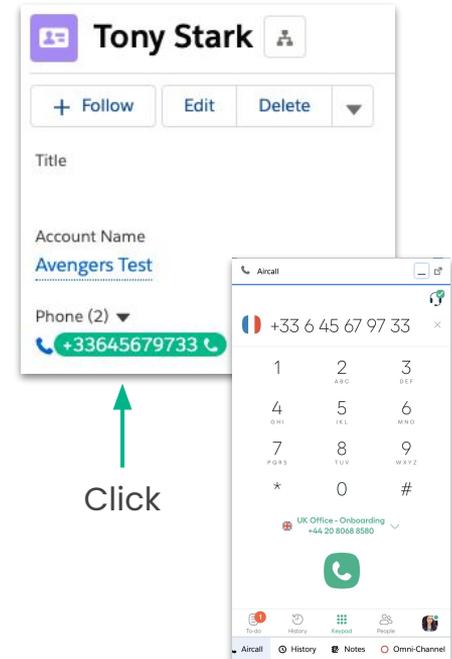
Search for a contact



Pick the right number



Click to dial



Defining
Outbound
Calling
Options

Receiving
Calls

Making
Calls

Viewing
In-Call
Features

Transferring
a Call

Transferring
-Warm
Transfer

Conferencing &
Parallel Calling

Ending
a Call

Contact name

Check your
network

Mute yourself

Pause the call
recording

Put caller on hold

Assign to your
colleagues

Keyboard

Tag your call

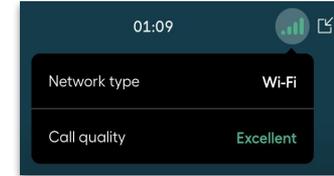
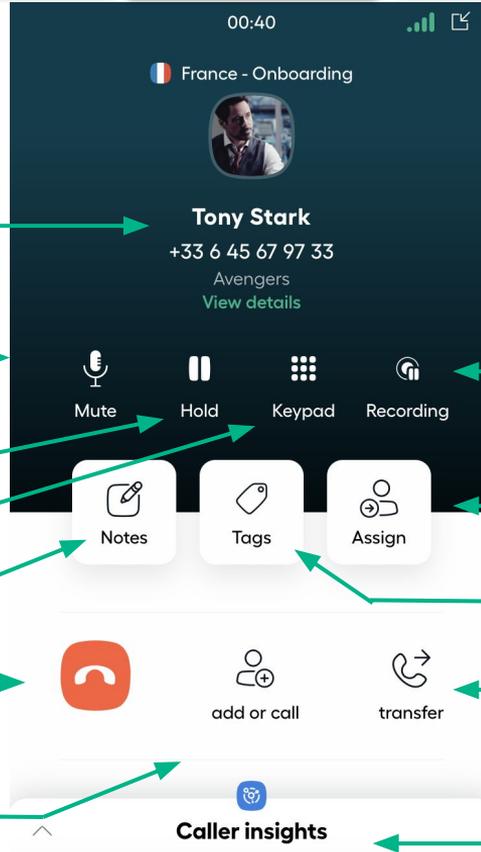
Take notes

End call

Transfer a call

Conference call or start
a second call

Open Contact profile on
your CRM or Helpdesk



Defining
Outbound
Calling
Options

Receiving
Calls

Making
Calls

Viewing
In-Call
Features

Transferring
a Call

Transferring
-Warm
Transfer

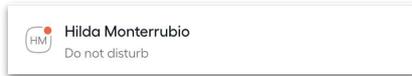
Conferencing &
Parallel Calling

Ending
a Call

Calls can be transferred to a **team**, another **agent**, an **external number** or a **contact**.

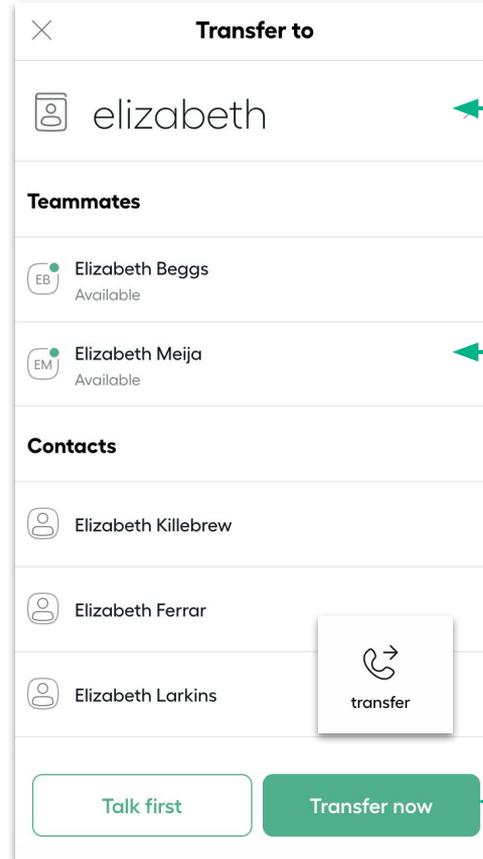
Transfers can be **cold** (immediate) or **warm** (speak to agent first while customer is on hold).

If the agent or team is **not available**, the profile will not be clickable.



The little **green dot** confirms the agent is **available**.

Note: If agent rejects or does not pick up the call, the call will ring back on your app to avoid missing any calls.



Search or type
phone number

Select

Click

Defining
Outbound
Calling
Options

Receiving
Calls

Making
Calls

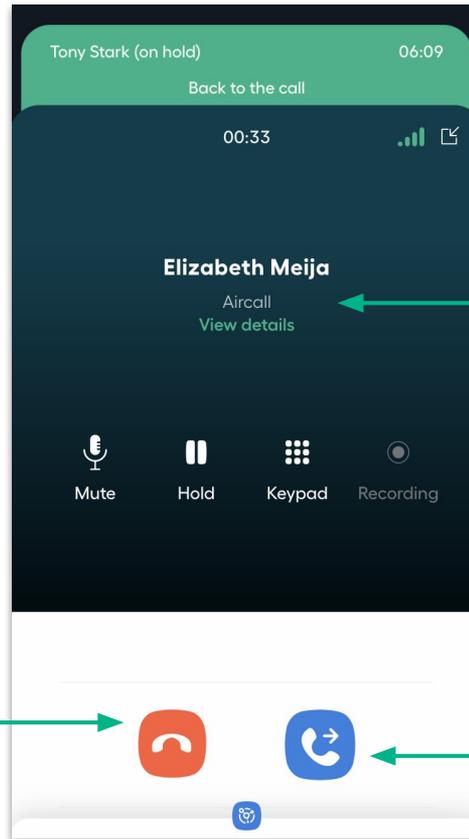
Viewing
In-Call
Features

Transferring
a Call

Transferring
- Warm
Transfer

Conferencing &
Parallel Calling

Ending
a Call

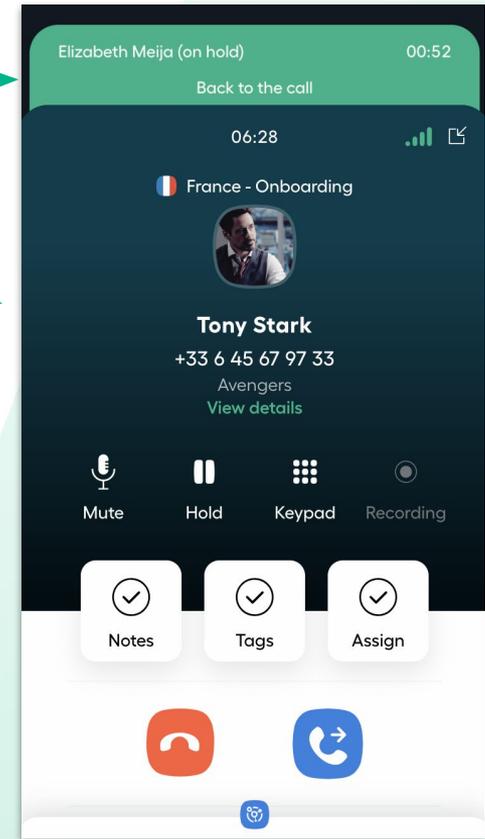


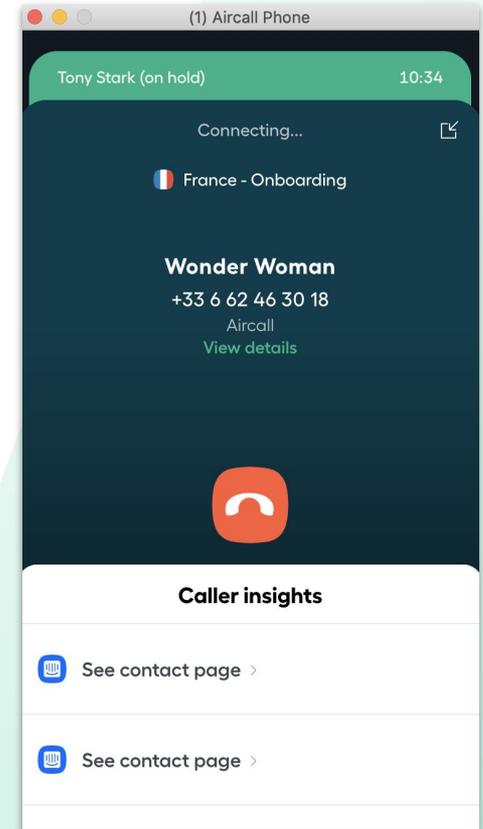
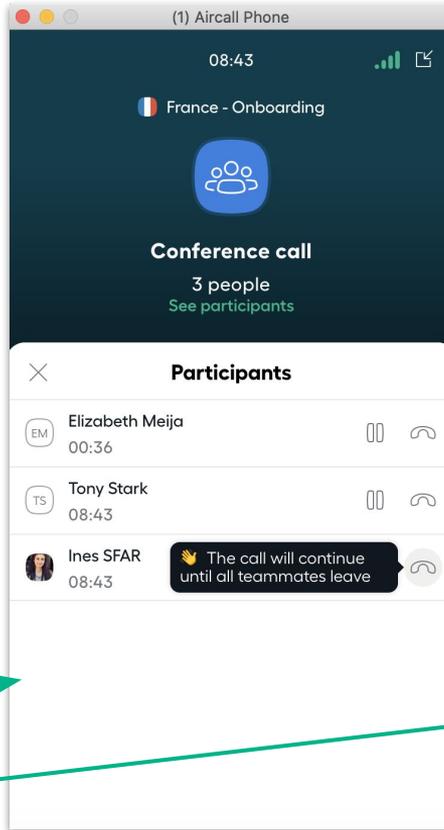
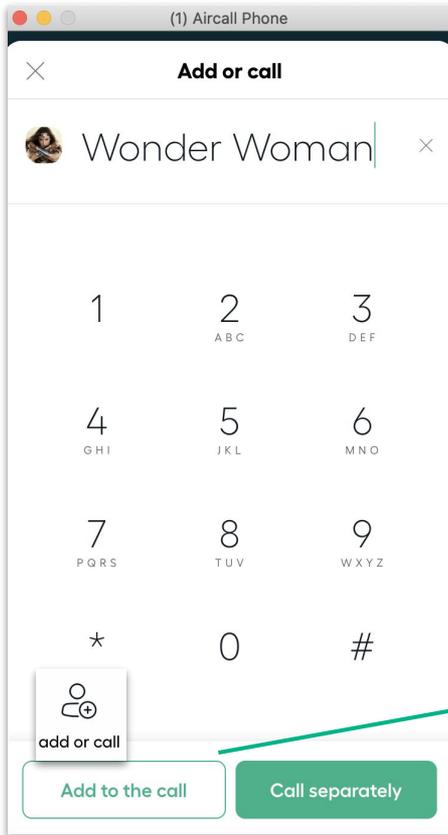
Click to
switch

Person you are
talking to

End the call with
the colleague

Click to **transfer**





Defining
Outbound
Calling
Options

Receiving
Calls

Making
Calls

Viewing
In-Call
Features

Transferring
a Call

Transferring
-Warm
Transfer

Conferencing &
Parallel Calling

Ending
a Call

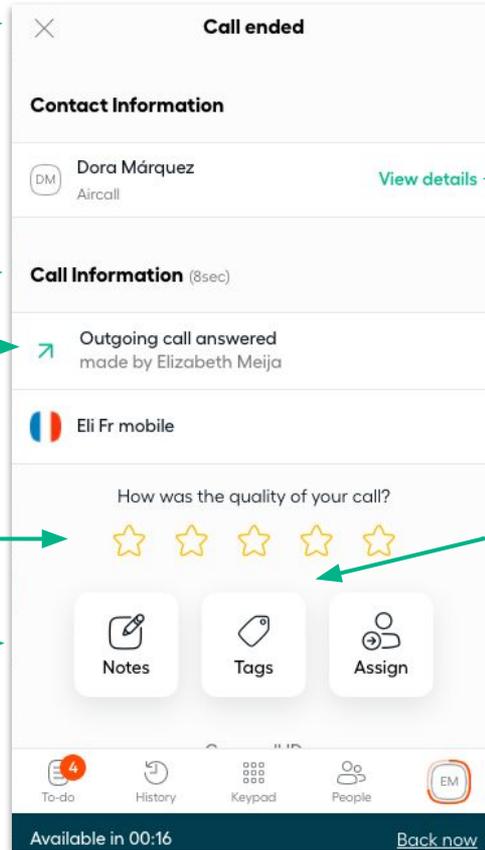
Exit **Call ended**
view to return
to app

Call duration

Call direction and
Call **Assignment**

Rate your call

Add **Notes**



View details

Contact details

Call Information (8sec)

Outgoing call answered
made by Elizabeth Mejia

Eli Fr mobile

Your **Aircall**
Number

How was the quality of your call?



Add **Tags**



Notes



Tags



Assign

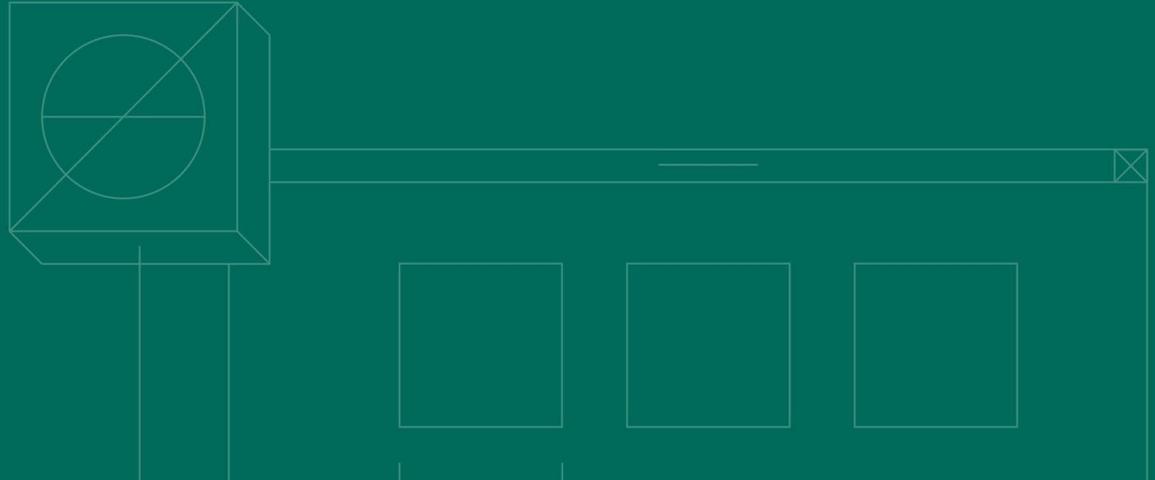
Assign call

Available in 00:16

Back now

Wrap-up time

Managing your Call Activity



Accessing Call History

Accessing To-Do

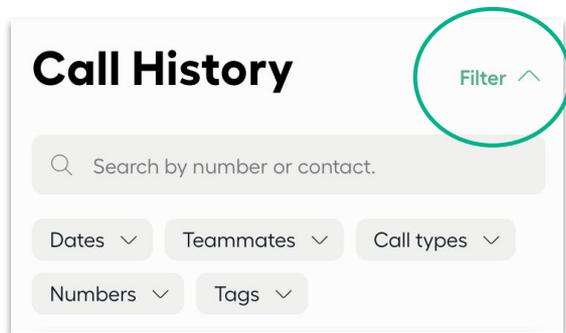
Exploring To-Do

Viewing Call Details

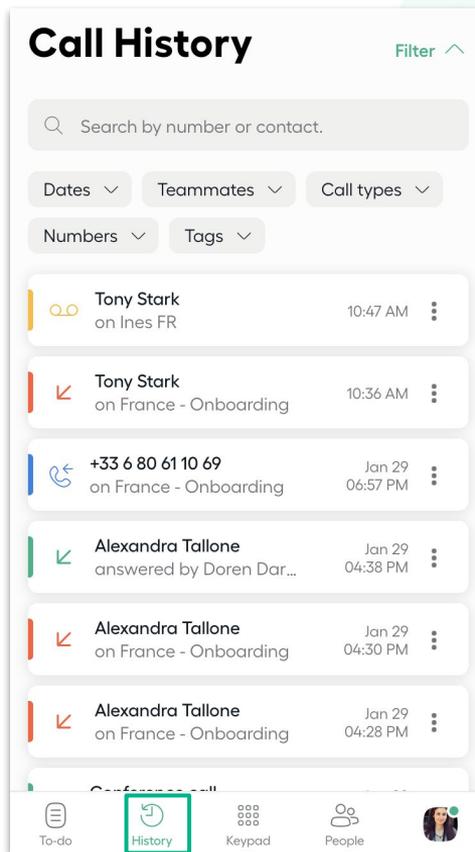
The **Call history** is where you can find all of your call activity.

You can retrieve your previous calls (**inbound and outbound calls**, **missed calls**, **voicemails**, or **callback requests**).

You can **filter** your calls by specific number, users, date ranges, tags 📌, etc.



💡 **Tags are a great way to customize how you search for calls on the app. Ask your Admin which tags have been created for your team!**



Accessing
Call
History

Accessing
To-Do

Exploring
To-Do

Viewing
Call
Details

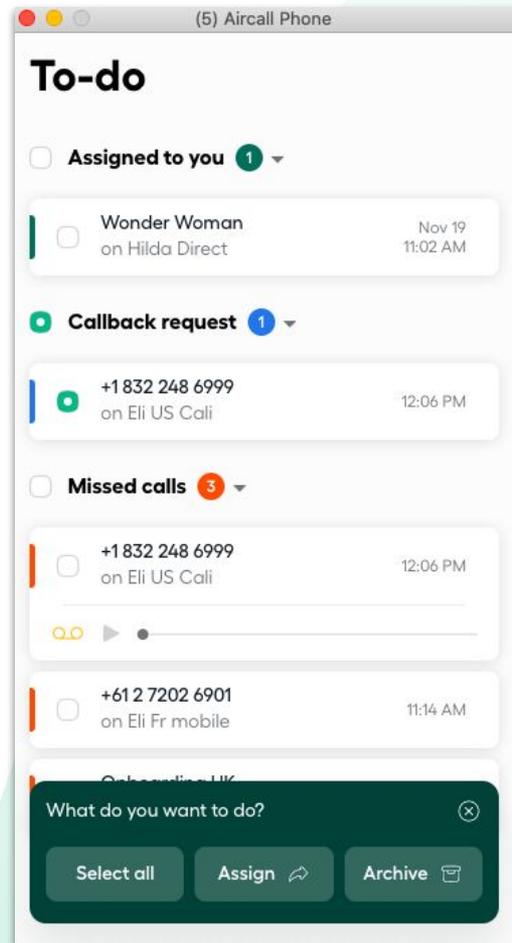
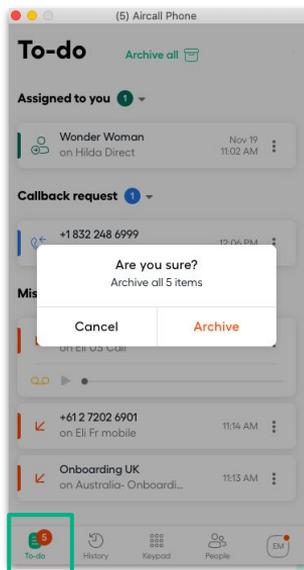
The **To-do** is where you can find all pending calls (call assignments, missed calls, voicemails, or callback requests*).

You can **filter** your calls by specific number to check your most important tasks.

You can **achieve all** calls by clicking on the left side of the call

You can **Assign** calls to your teammates, **mark as done**, copy the number to call back or click to open call details.

Note: Access to the call back request feature depends on the Aircall plan.

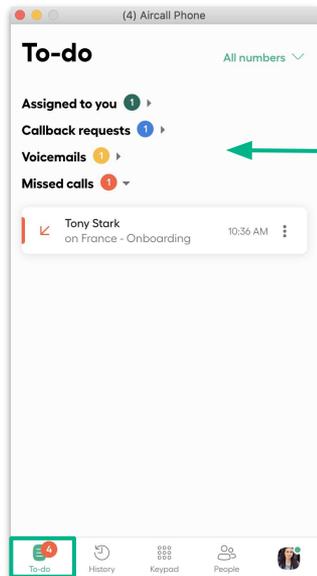


Accessing Call History

Accessing To-Do

Exploring To-Do

Viewing Call Details



Click the drop-down to expand details

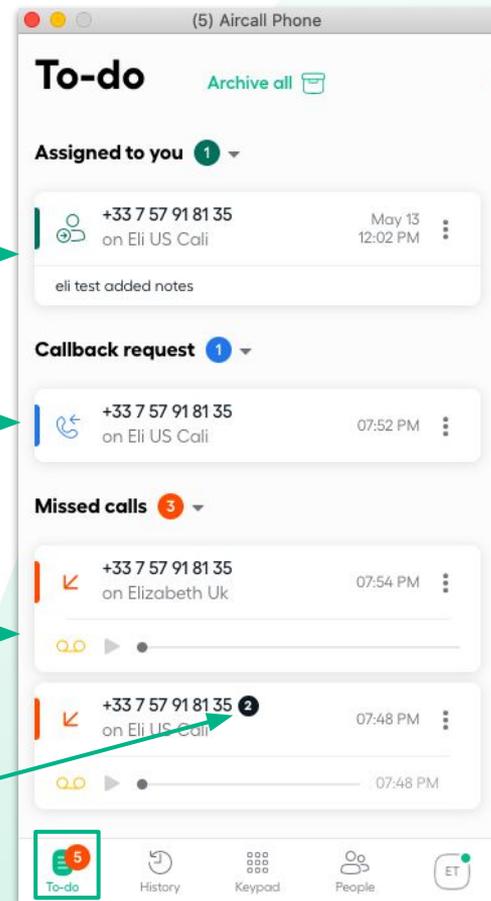
Once you archive, assign or call back, the call will **disappear** from the To-do section

Click on call to view details and notes taken by your colleagues and assigned to you

Client asked to be called back

Missed calls and Play Voicemail

Missed calls and Voicemails are grouped



Accessing
Call
History

Accessing
To-Do

Exploring
To-Do

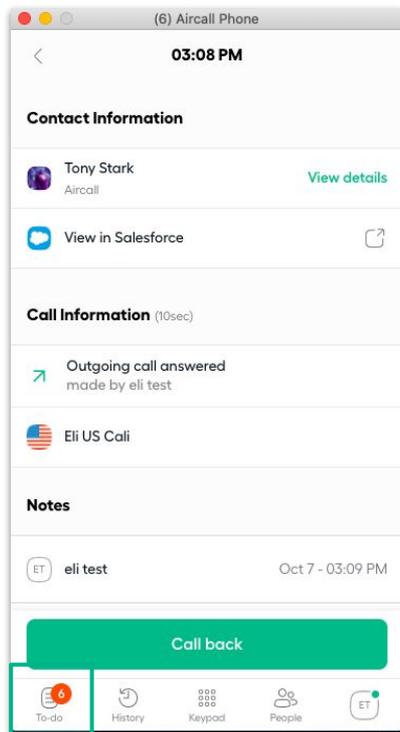
Viewing
Call
Details

A **Call ID** is used by our support team as a reference to troubleshoot your calls if needed

Click on the integration to open contact profile

Call information

Scroll down for more options



Recording

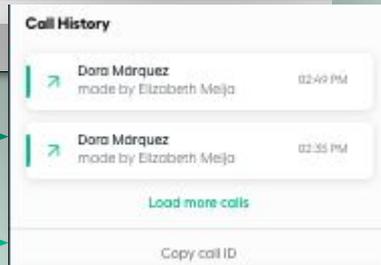
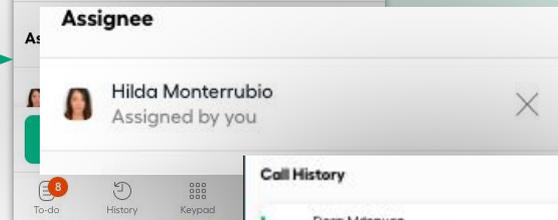
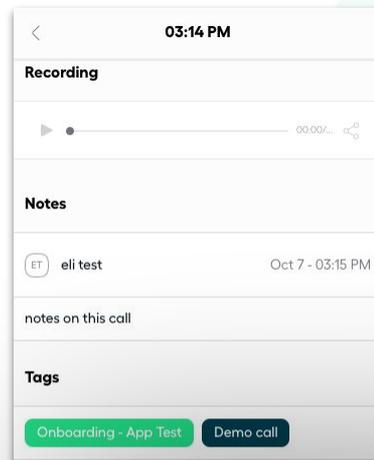
Call Notes

Call Tags

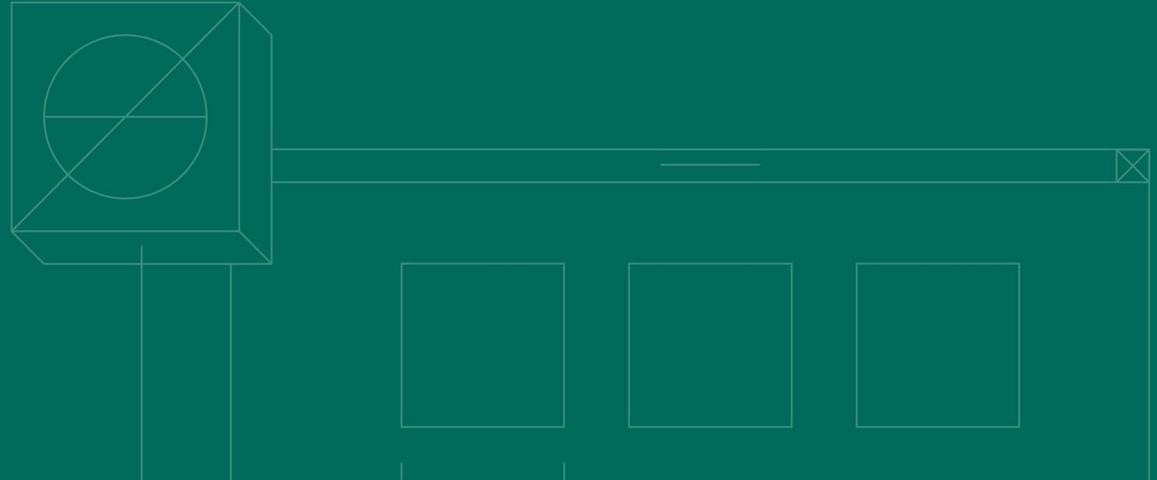
Call Assignment

Contacts call history

Copy call ID



Troubleshooting



Troubleshooting

Call Quality
Notifications

Need Help?



Update your App

Making sure that your Aircall Phone is updated to the most recent version is important as newer versions include performance updates.

To learn how to update on Windows 10 + and MacOS 10.14+, [Click here](#)



Reload your App

Reloading your app is helpful when your changes have been made to the app.

To learn how to reload on Windows 10 + and MacOS 10.14+, [Click here](#)



Clear Cache and Cookies

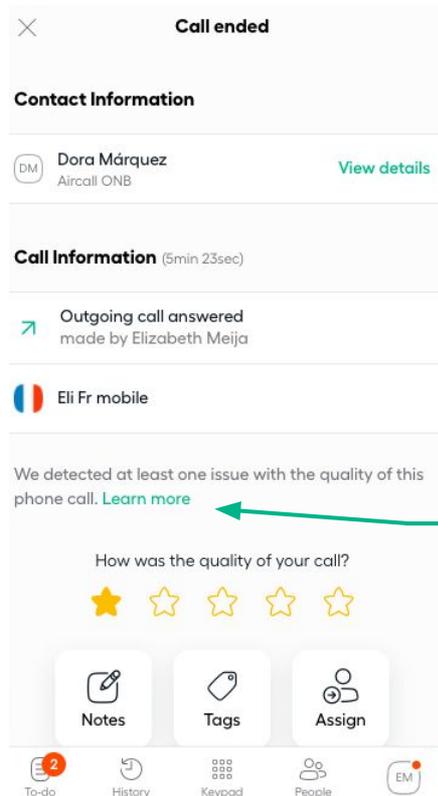
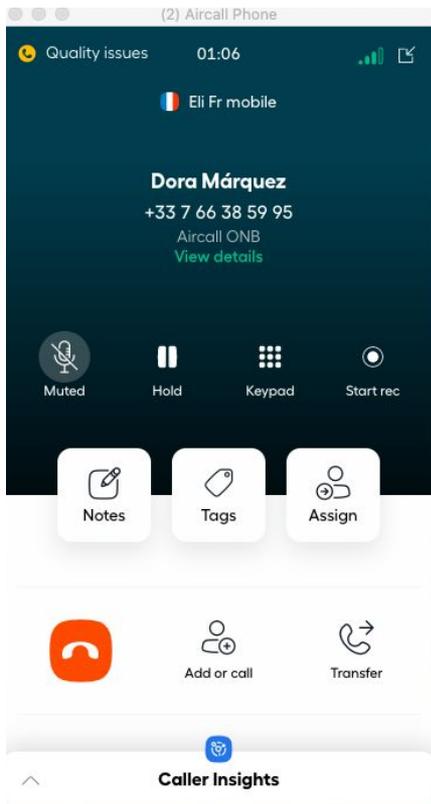
Clearing cache and cookies is a useful way to fix any errors in the app, such as loading or formatting issues.

To learn how to clear cache and cookies on Windows 10 + and MacOS 10.14+, [Click here](#)

* For more troubleshooting tips, visit our Knowledge Base, by clicking [here](#).

Call Quality notification

A yellow **call quality** icon will pop-up if you are currently experiencing call quality inconsistencies during a call.



In the **call end** view, you can select “**Learn More**” to obtain more details about the specific quality issues that occurred. You will be able to find direct access links to helpful articles that provide information regarding these issues and how you might resolve them yourself.

Troubleshooting

Call Quality
Notifications

Need Help?

Need advice and answers:
[Knowledge Base Articles](#)

Contact our Support Team
<https://support.aircall.io/>





Thank you!

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