



The phone system for modern business.

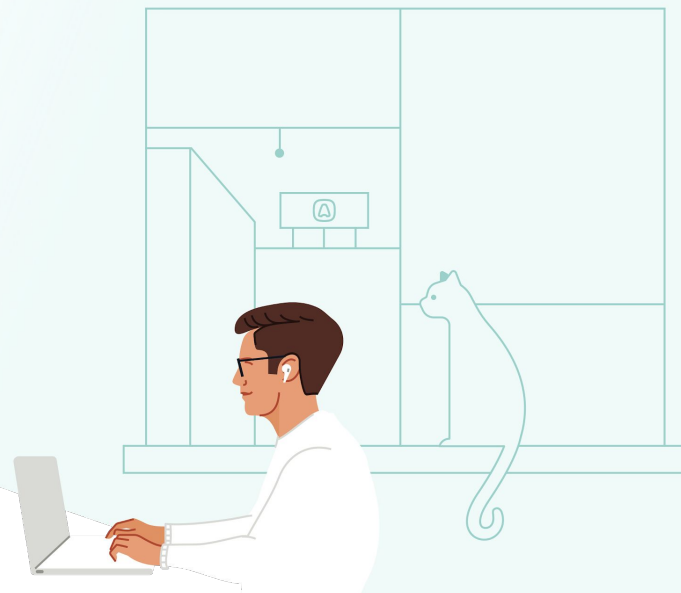
User Onboarding Guide



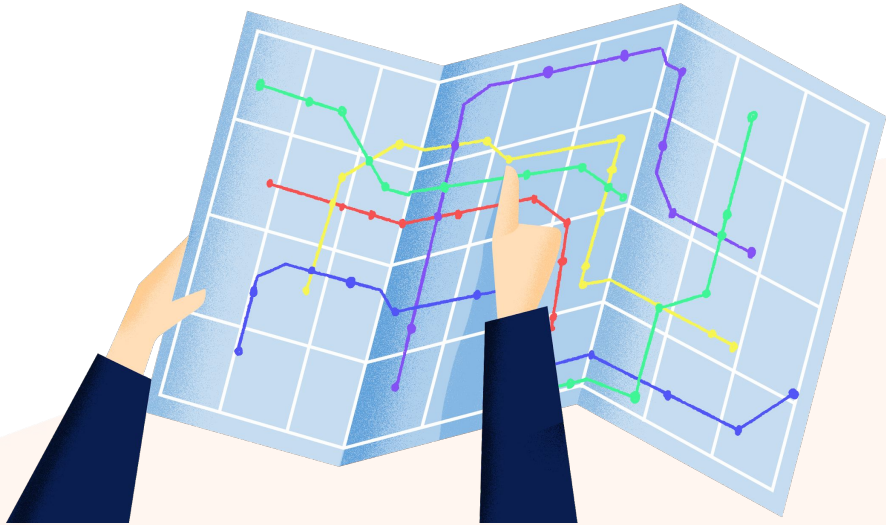
Getting started

All you need for happy calling!

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Prerequisites to use Aircall



Prerequisites to use Aircall



Powerful Computer

Update your Windows, macOS & **Chrome (72+)**

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 to have an increased bandwidth stability and superior call quality

Activate a QoS (Quality of Service) on your Router

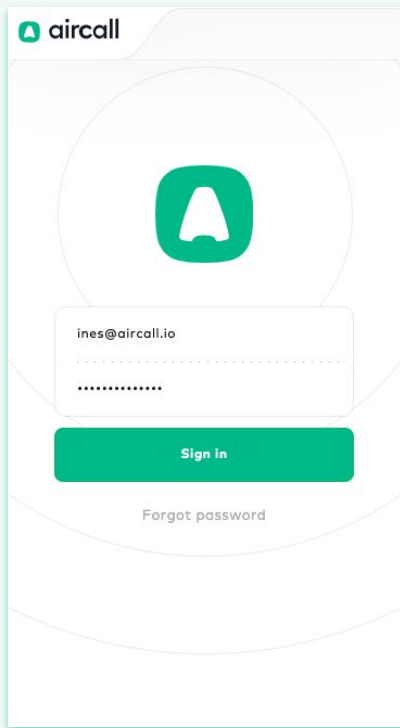


Getting started

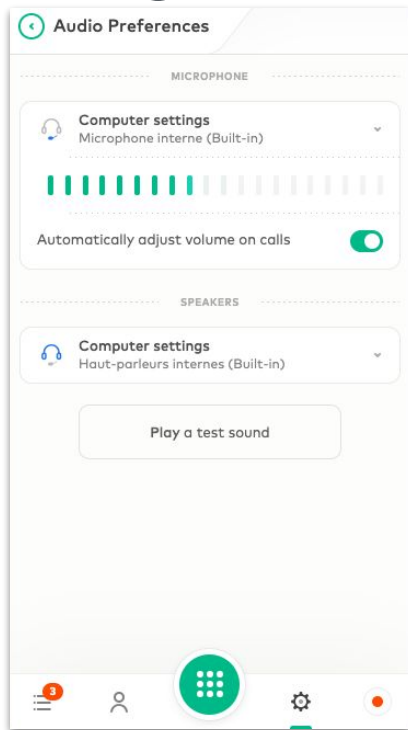
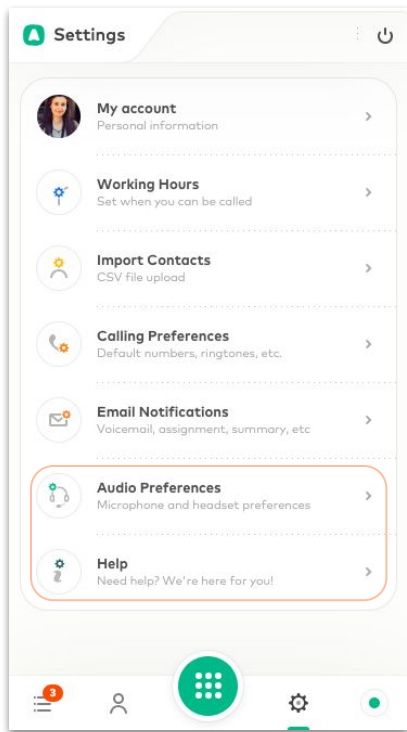


Access the App

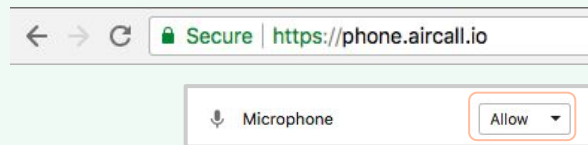
1. Accept your invitation request sent by email and follow the link to create your password
2. [Download](#) the Desktop App
or access the [Web App](#)
3. Login with your professional email and password
4. Test your headset and microphone



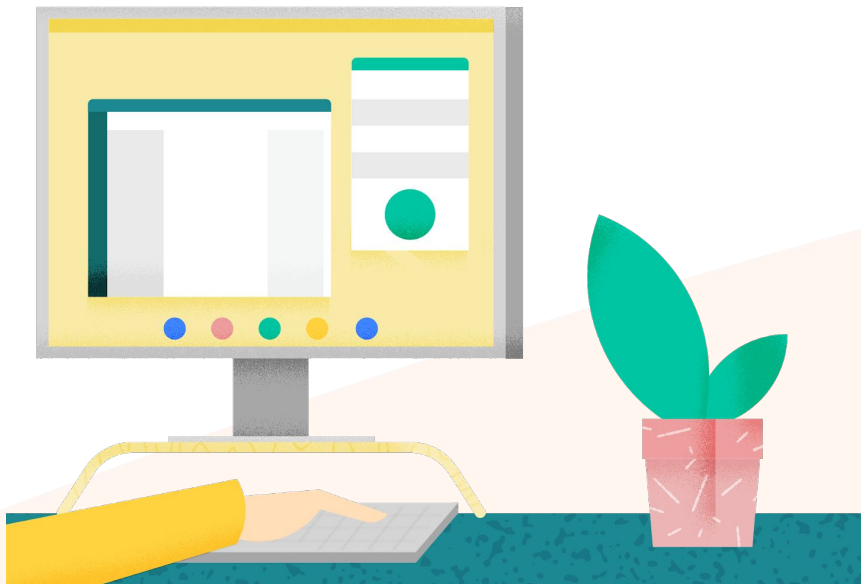
Headset testing



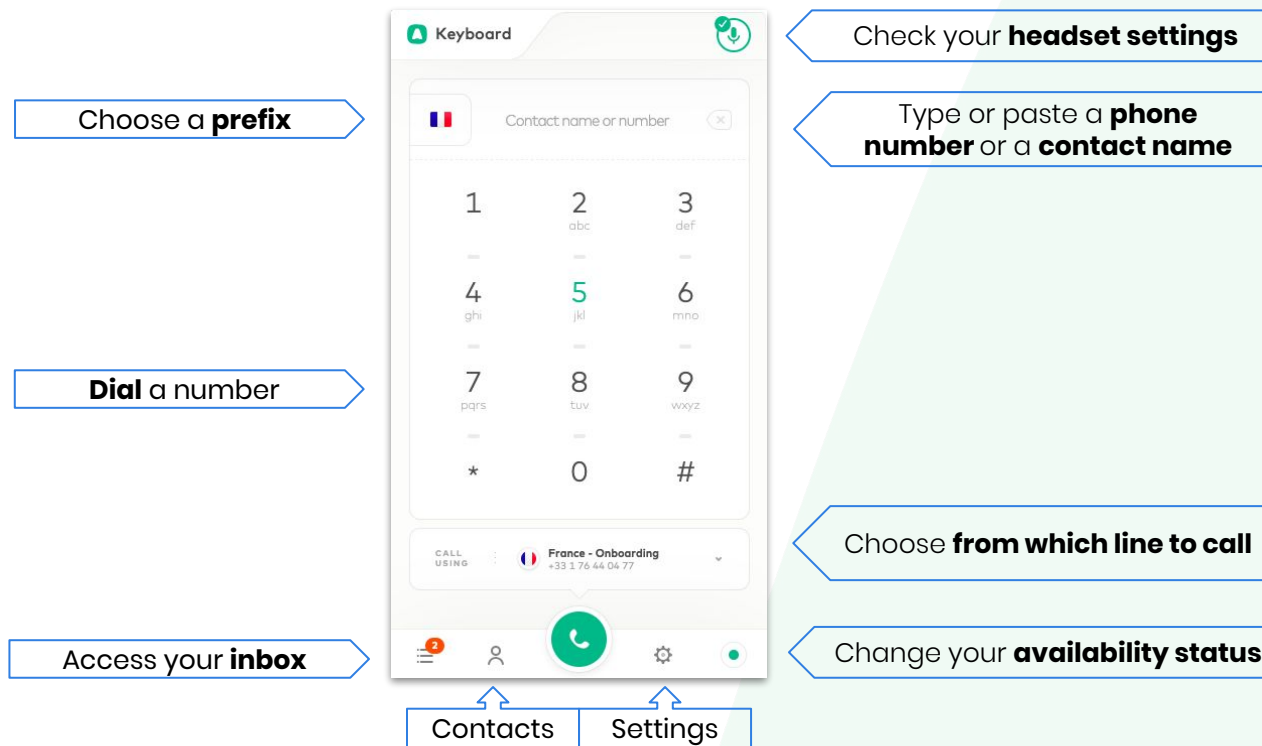
Make sure your **headset** is **also** **recognized** by **Chrome**



Making & taking phone calls



The aircall phone



Availability Management

AVAILABLE

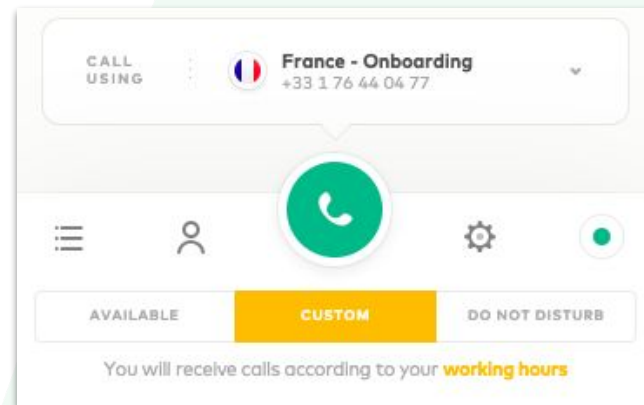
Receive calls when the numbers you are assigned to are open

CUSTOM

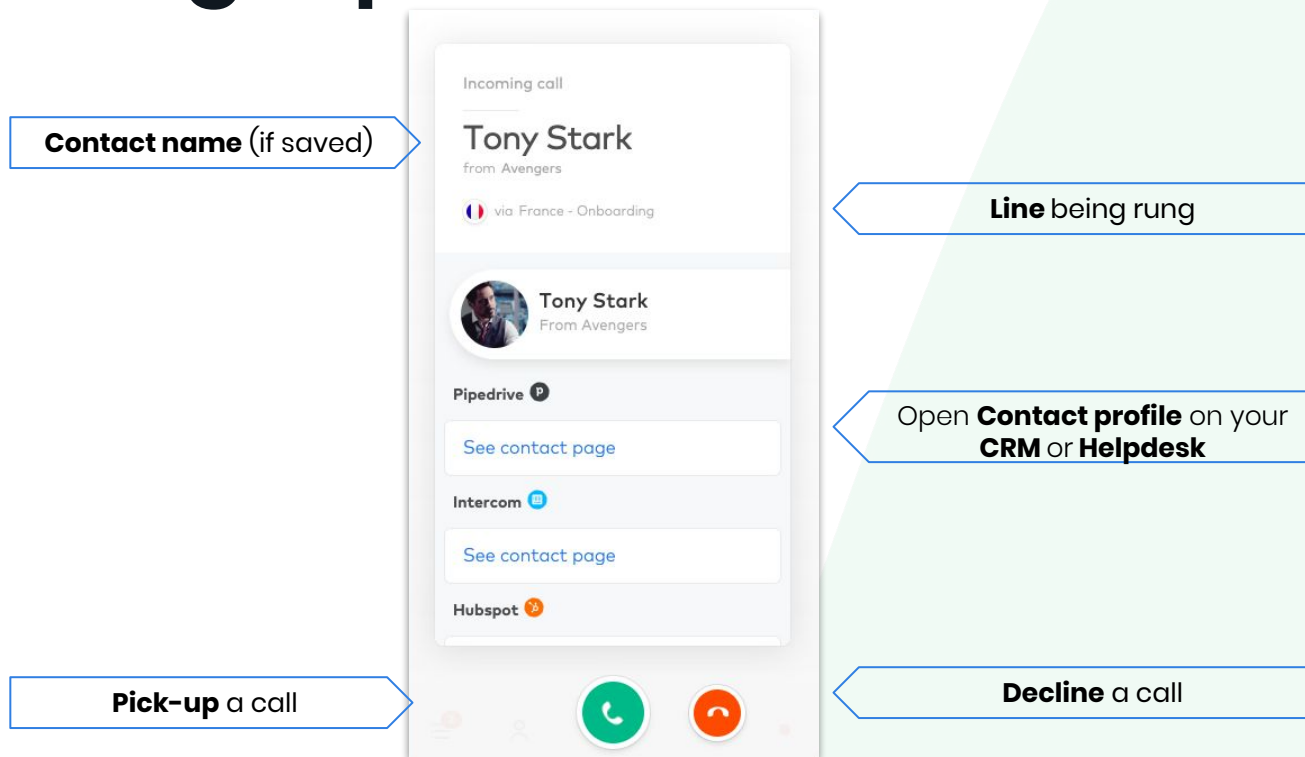
Receive calls within your **working hours** (to be defined in settings)

DO NOT DISTURB

Never receive calls



Receiving a phone call



Making a phone call

1- **Dial** your number using:

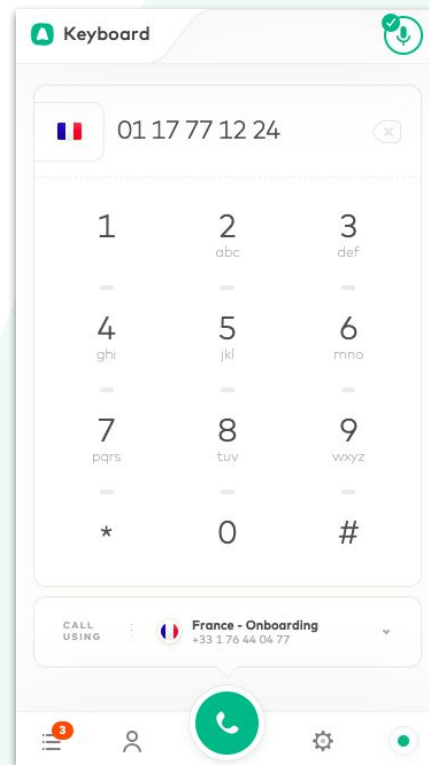
- your keyboard
- aircall keyboard
- chrome extension “[Click-to-dial](#)”

OR

Type the name of the person you want to reach

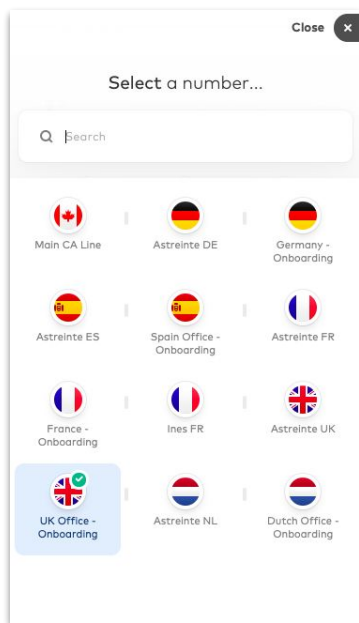
2- **Click** the green button

3- Happy calling!

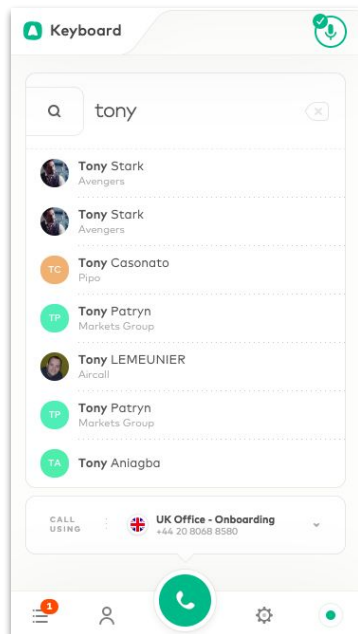


Outgoing calls

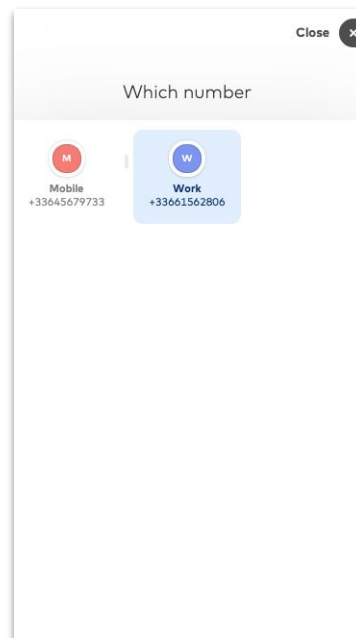
Select a line to call from



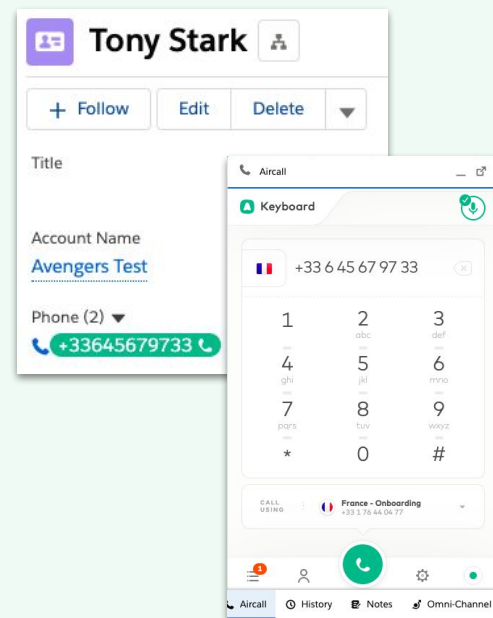
Search a contact



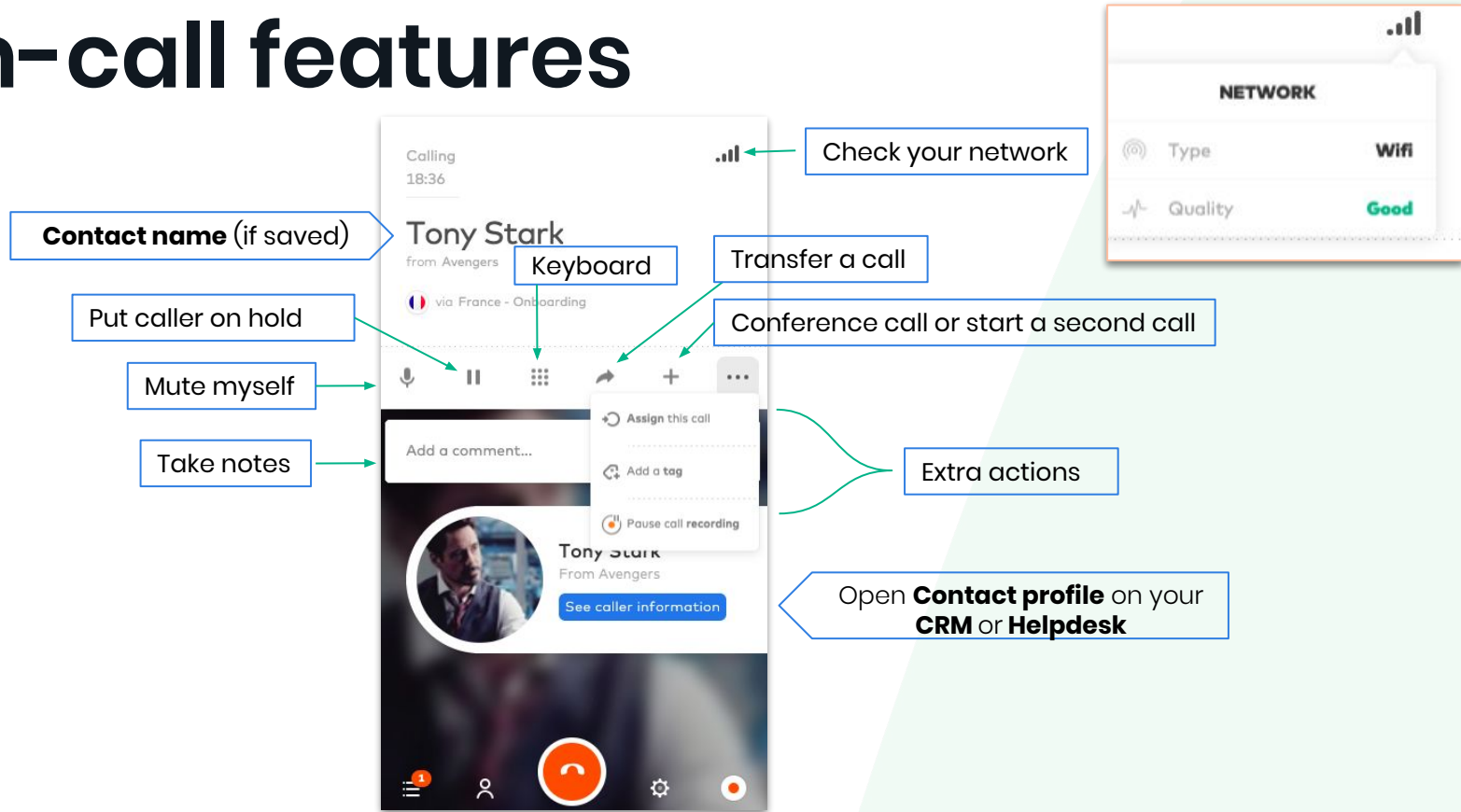
Pick the right number



Click to dial



In-call features



In-call features



Mute yourself



Keyboard



Put the customer
on hold



Transfer



Add people



Start a second call



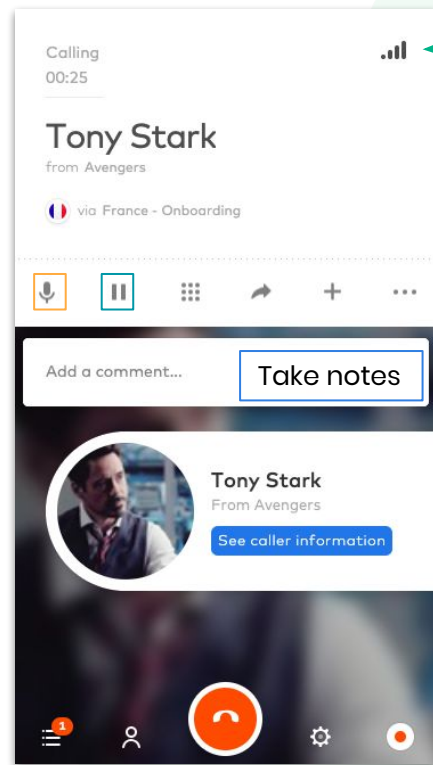
Assign this call



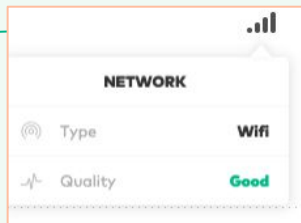
Add a tag



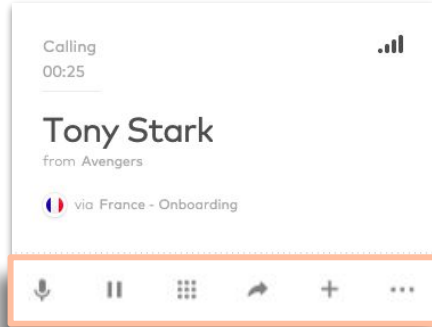
Pause call recording



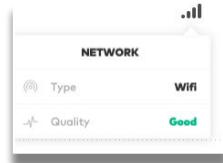
Check your network



In-call features



Check your network



Mute yourself



Put the customer on hold



Conference call
Start a second call



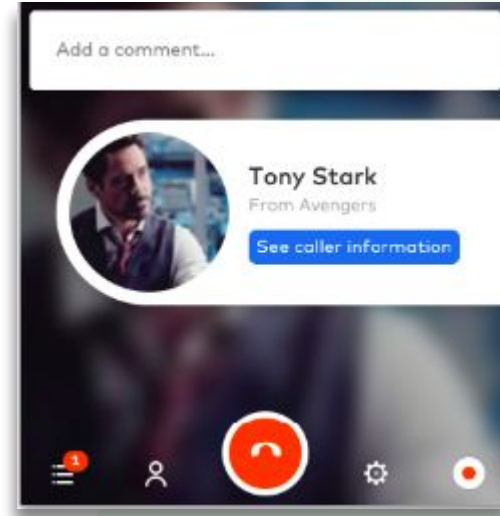
Keyboard



Transfer a call



Assign a call
Tag a call
Pause call recording



Take notes

See caller information



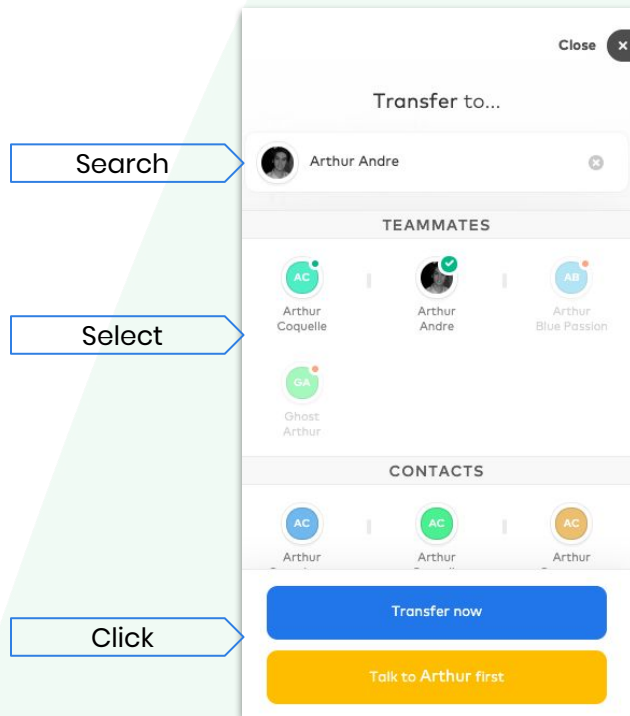
Transferring a call

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

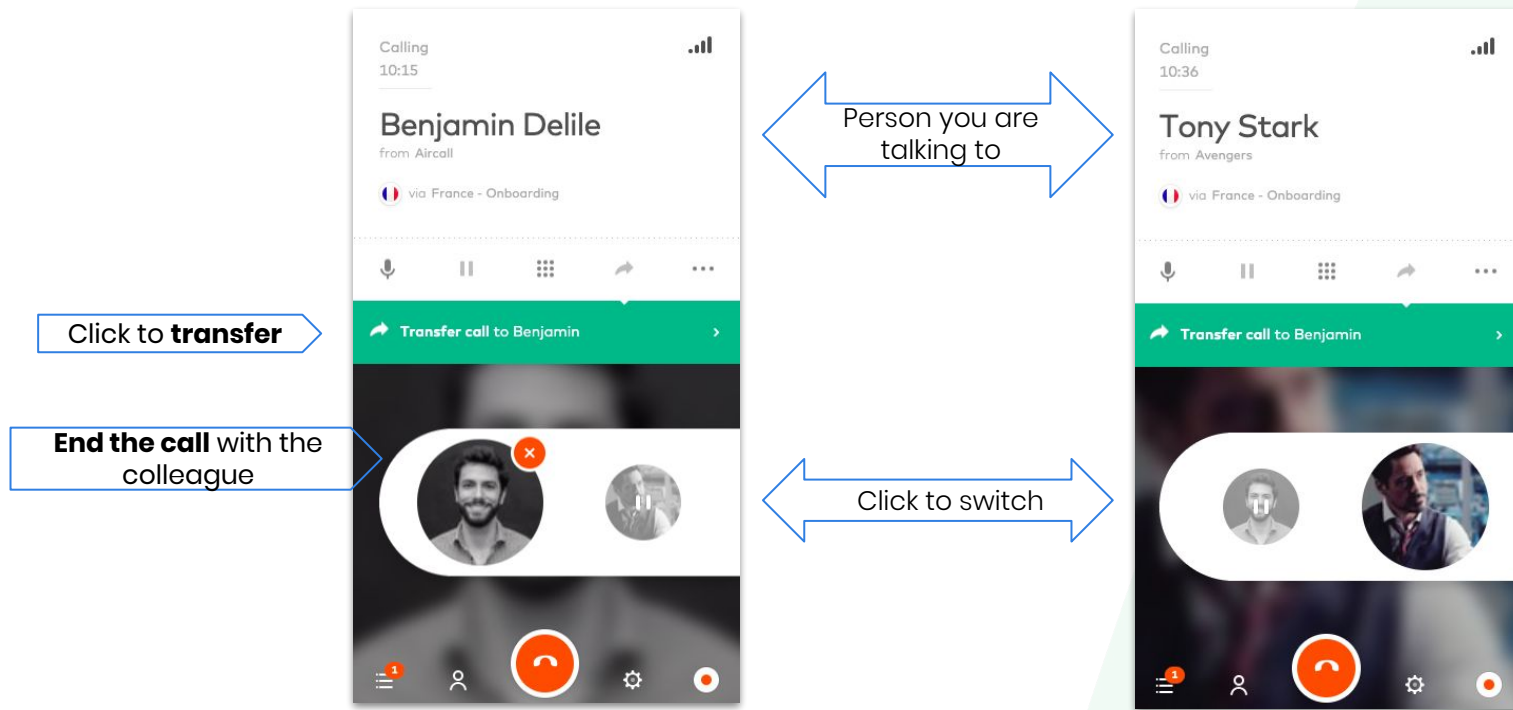
Transfers can be **cold** (immediate) or **warm** (agent is notified while customer is on hold)

If the agent or team is **not available**, the icon will be greyed.

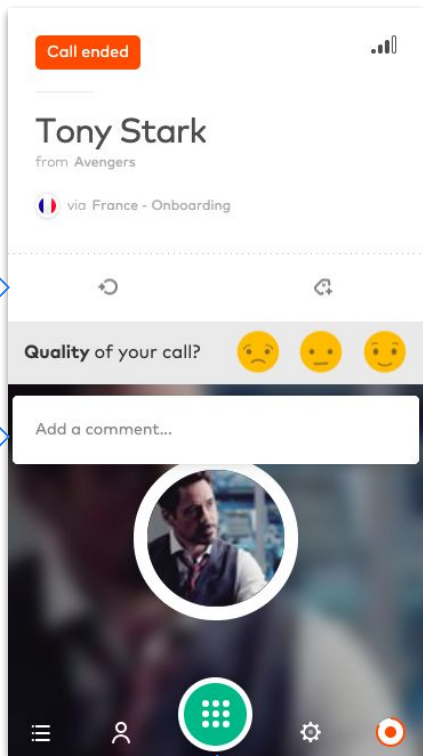
The little **green dot** confirms the agent is **available**



Warm transferring



Post call work



Assign your call

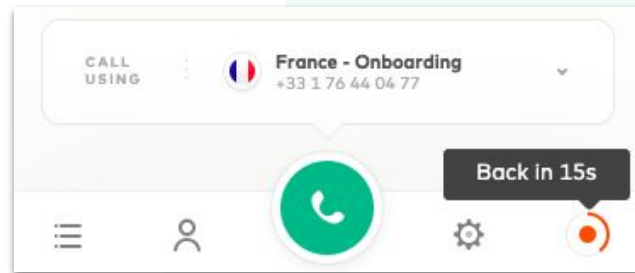
Edit your **notes**

Add **tags**

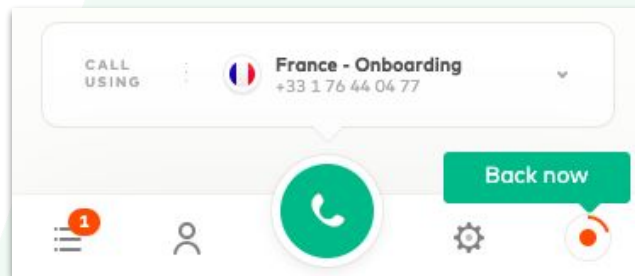
Rate your call

Wrap-up time

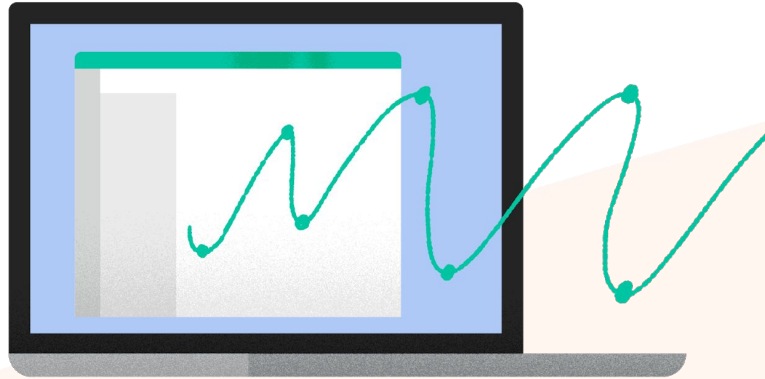
Main menu



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



Navigating the inbox

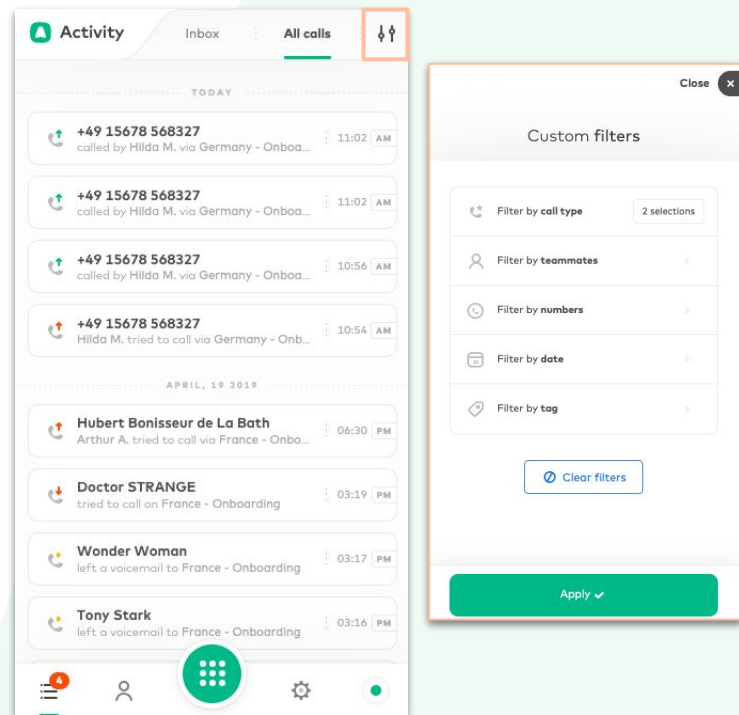


Accessing the call activity

The **inbox** is where you can find all pending calls
(**missed calls**, **voicemails**, or **callback requests**)

In **all calls**, you can retrieve your previous calls

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



The Aircall inbox



Listen to voicemail

Play the voicemail



Archive

Skip the call



Assign

Notify your teammate



Call back

Reach back your client



Details

Open the call page

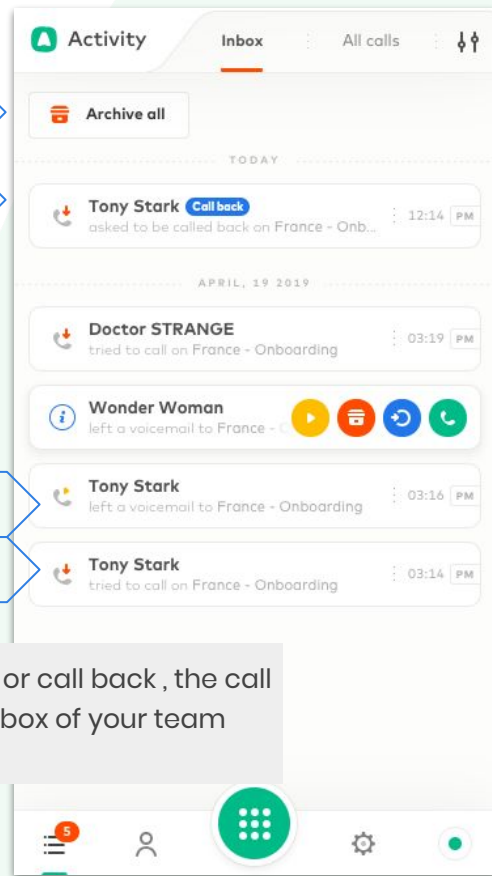
Archive all calls for
your entire team

Client asked to be
called back

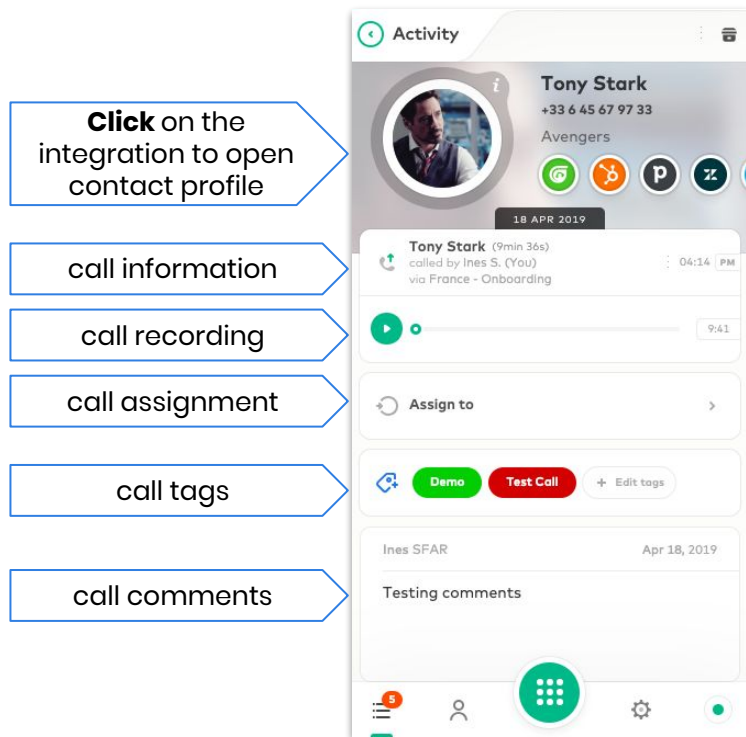
Voicemail

Missed call

Once you archive, assign or call back , the call
will disappear from the inbox of your team

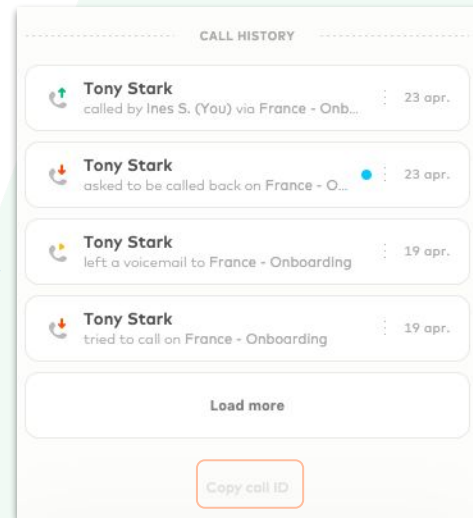


Call details page



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

Scroll down for more options



Setting up your phone



Phone settings

Manage your profile & see your general information

Set up your own business hours

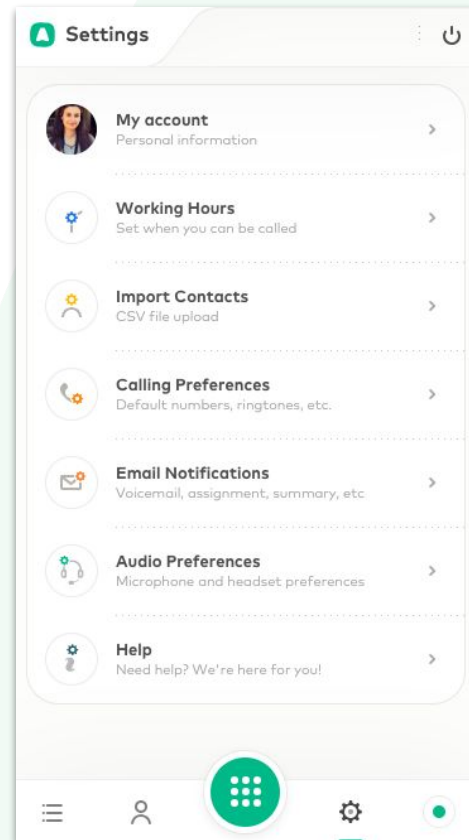
Import contacts to your Aircall agenda

Set up your calling preferences

Enable email notifications for pending calls

Define your audio devices

Access the knowledge base & chat with the support team



Setting up working hours

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

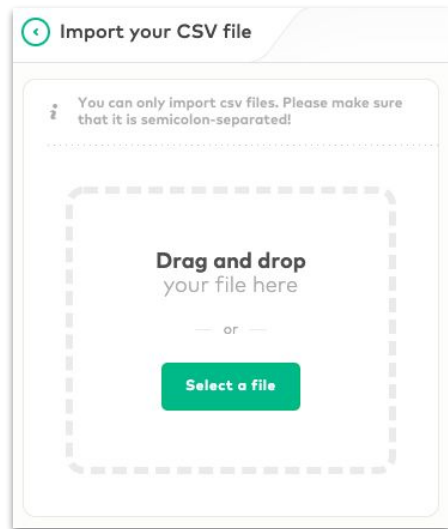
Make sure the **time zone** is properly selected
on the top right

You must set your availability status to **CUSTOM**

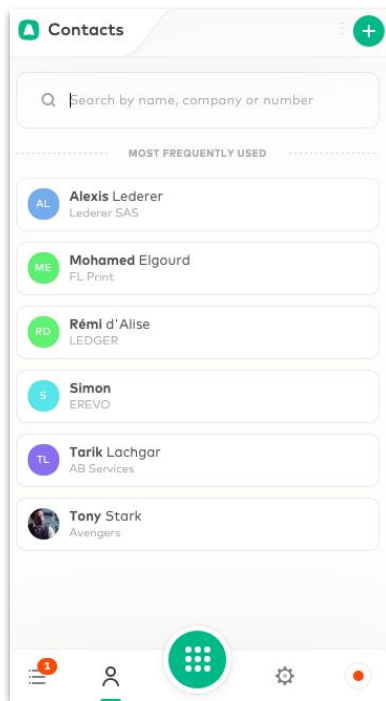
If you are on your **business hours** but the phone lines
are closed, you won't receive any calls.



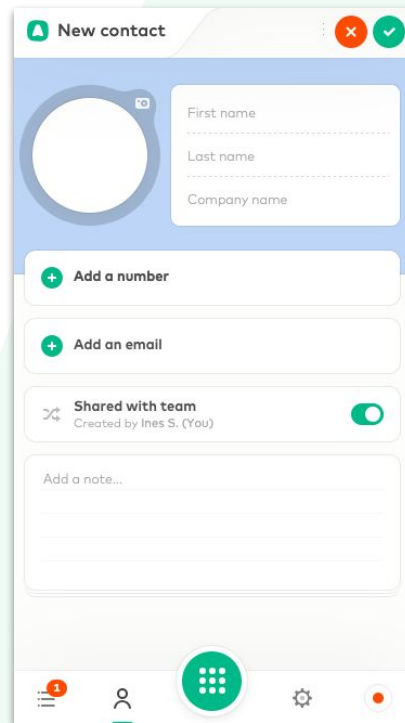
Importing & adding contacts



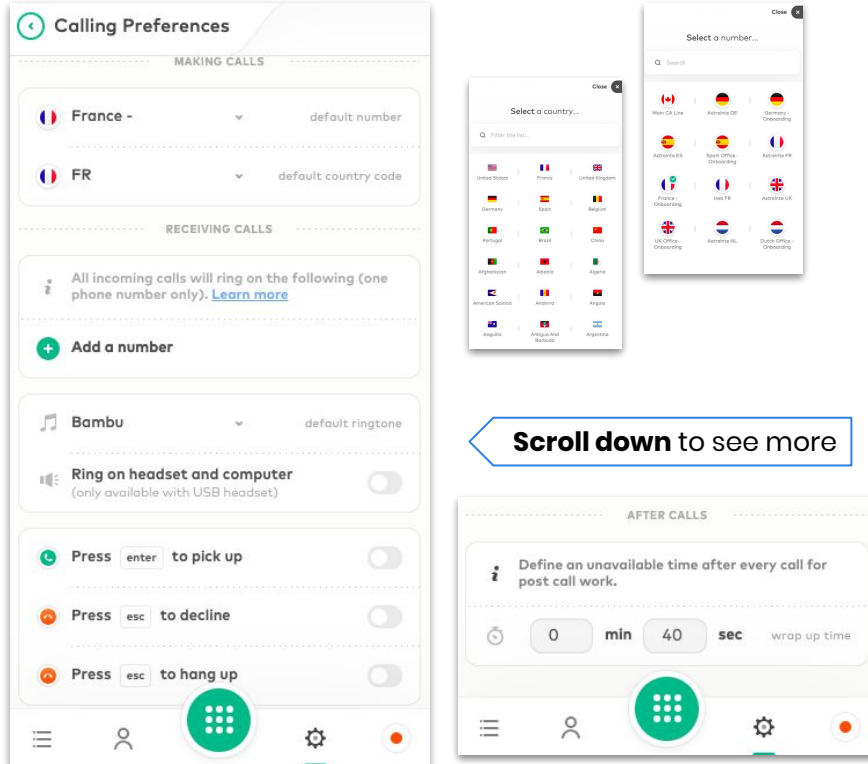
OR



&



Calling preferences



Define your default calling options

Forward calls to your mobile

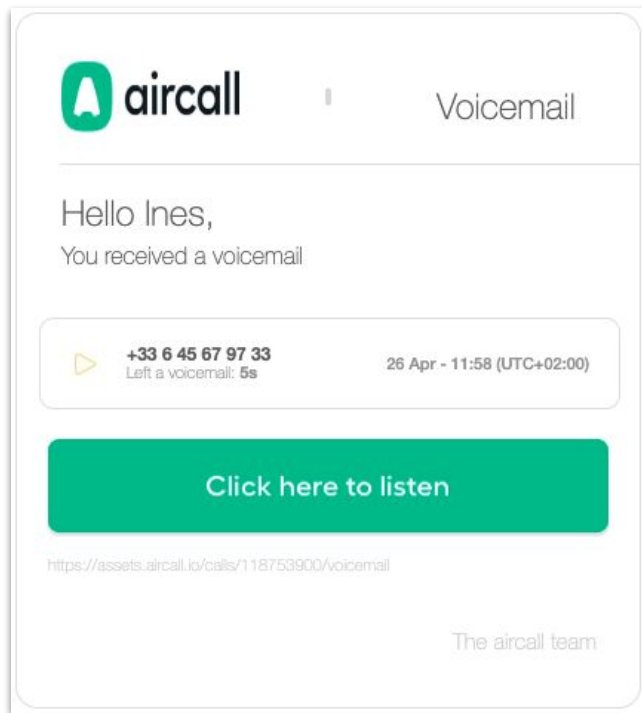
Choose your ringtone


Make your app ring on speakers

Activate keyboard shortcuts

Set your Wrap-up time

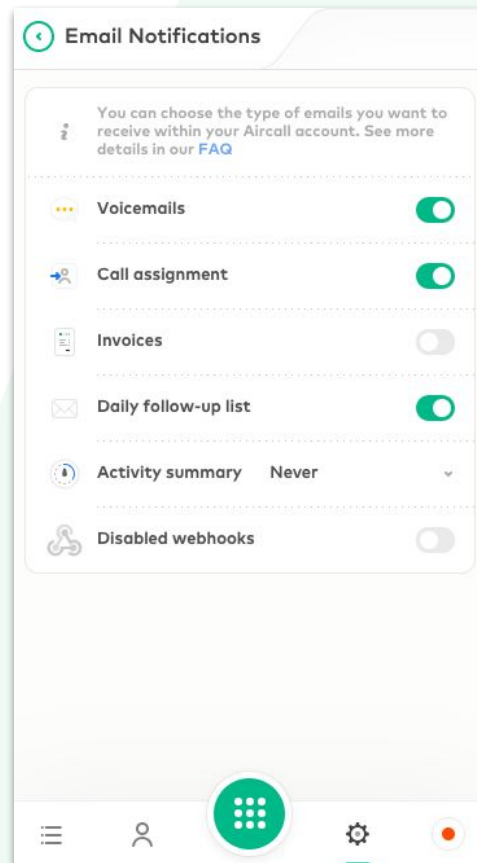
Email notifications



Activate the option and get notified by email 

Daily follow-up emails **missed calls remaining** reach your inbox every morning

Activity summary is for all aircall lines and is available only for Admins



Need help?

Check our Help Center
help.aircall.io

Contact our Support Team
support@aircall.io





Thank you!