PhoneIQ

Administration Portal Guide

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1. Access

1.1 Web Administrator Portal Access:

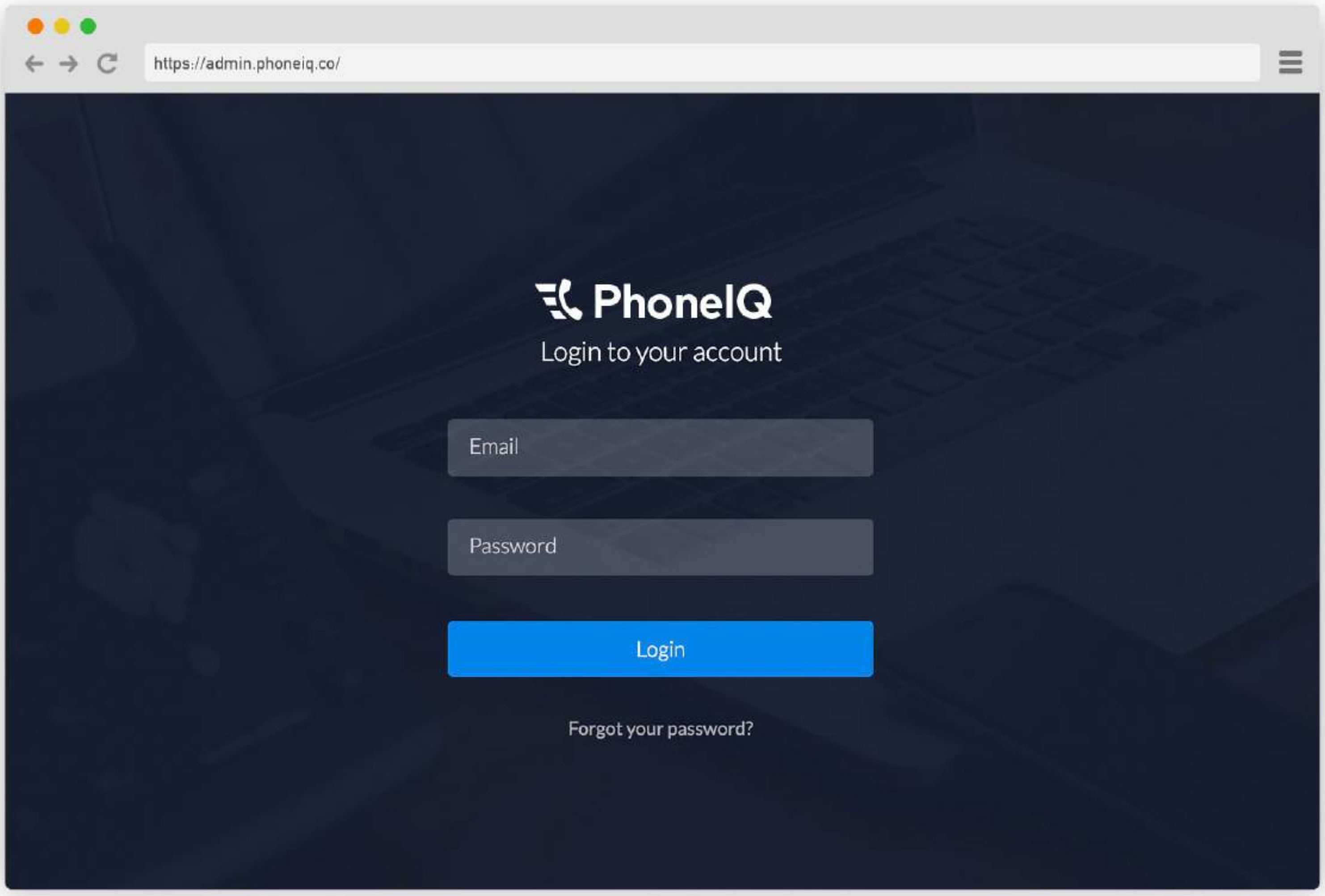
Using a web browser access the following url:

https://www.admin.phoneiq.co

Credentials:

Email address used to signup

Password



1.2 Forgot my password:

To restore your password:

a) Enter your email address.

b) Click in the forgot my password option in the login screen.

c) Check your email inbox for an automatic email with a link to restore your password.

d) Choose a new password.

e) Login with the new credentials.

2. Locations

Description:

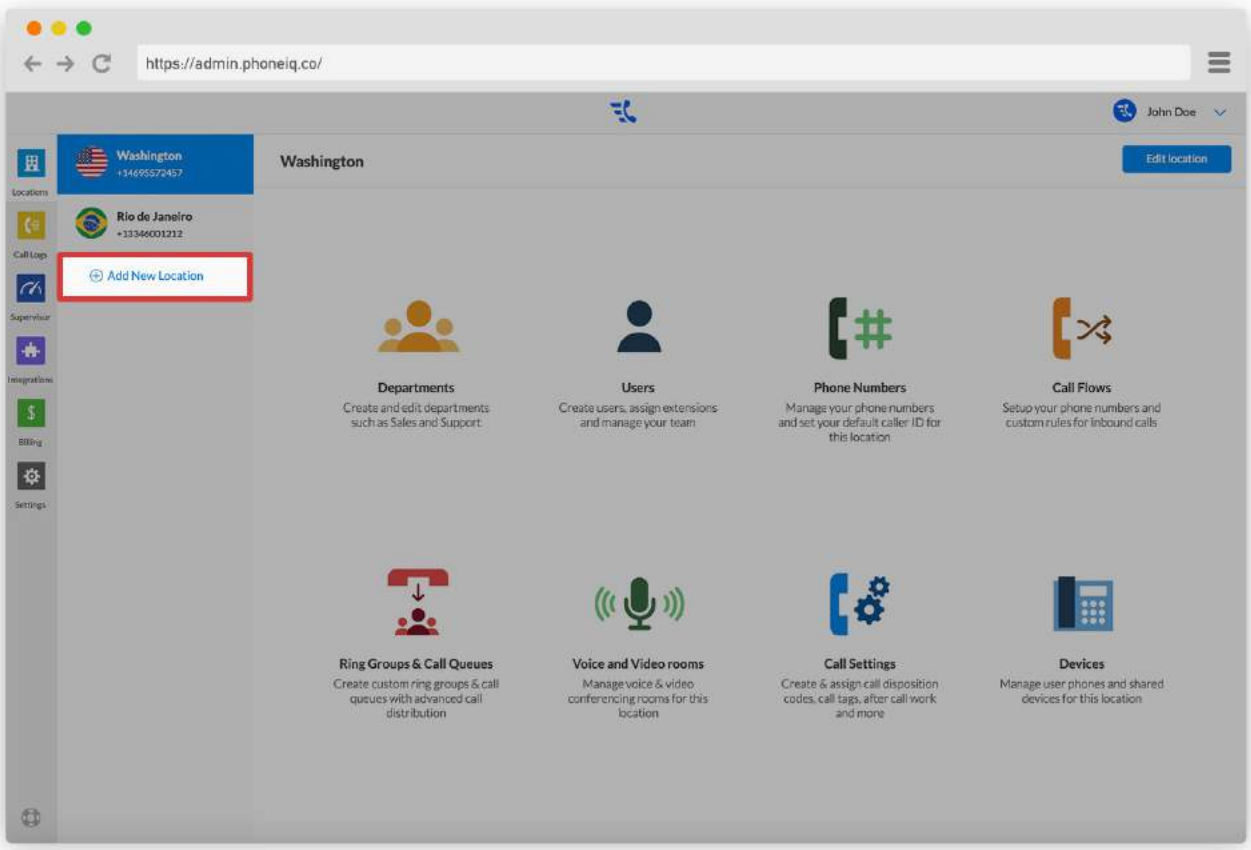
Locations allow administrators to easily group departments, users, call flows, phone numbers, devices and more. Locations can represent the different office locations of a business and provide different configuration options like:

a) Country: Defines the dialing plan for the users within the location.
b) Time Zone: Sets the default time zone for call flows within the location.
c) Language: Sets the language for the default voicemail greetings.
d) Emergency Services: If enabled for the account, it allows to setup the default E911 address for that location.

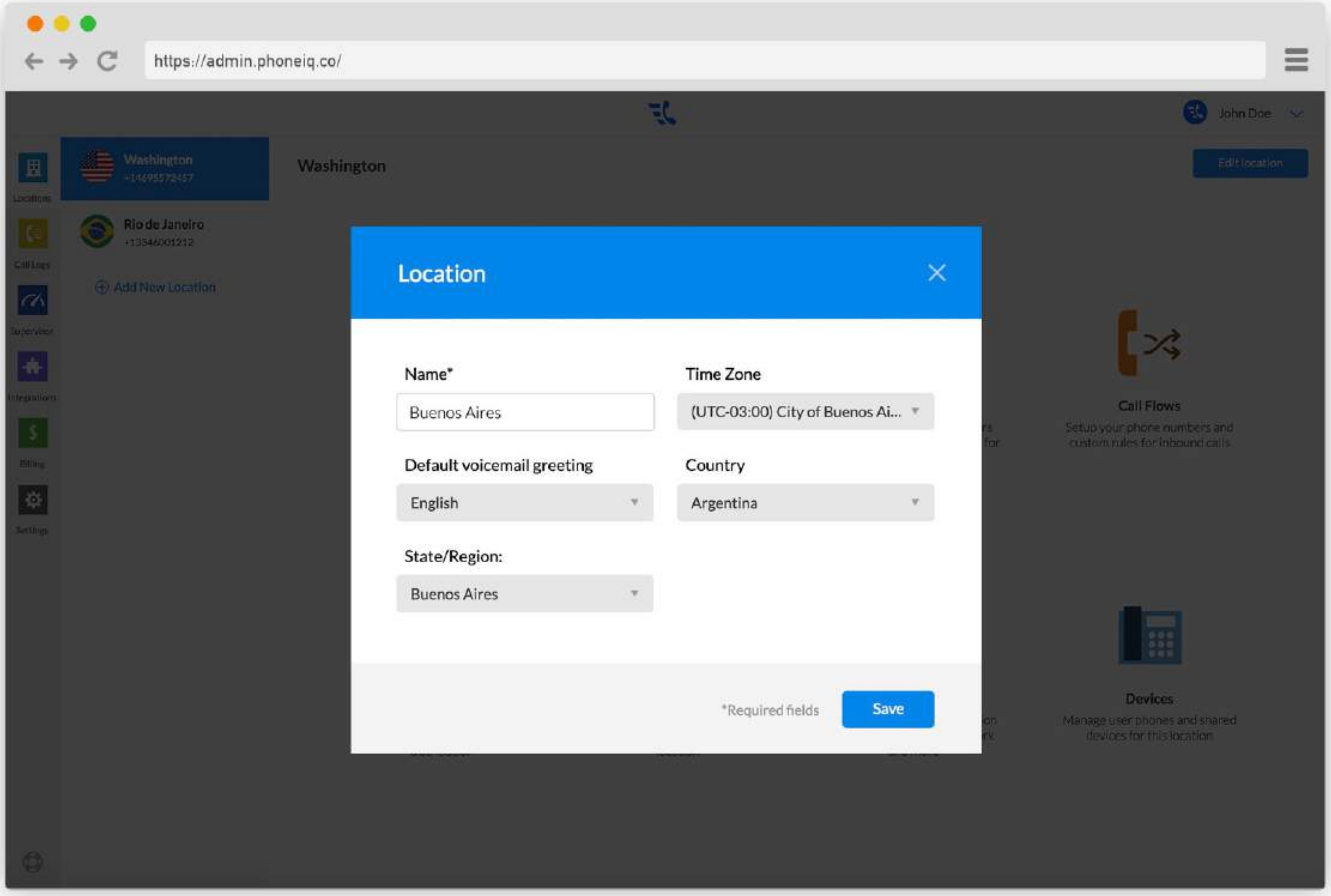
It is required to have at least one location within the account.

2.1 Create New Location:

Within the admin portal, under the locations app, select the option "Add New Location".



Once selected, complete the following form with the corresponding data.
Departments:



3. Departments

Description:

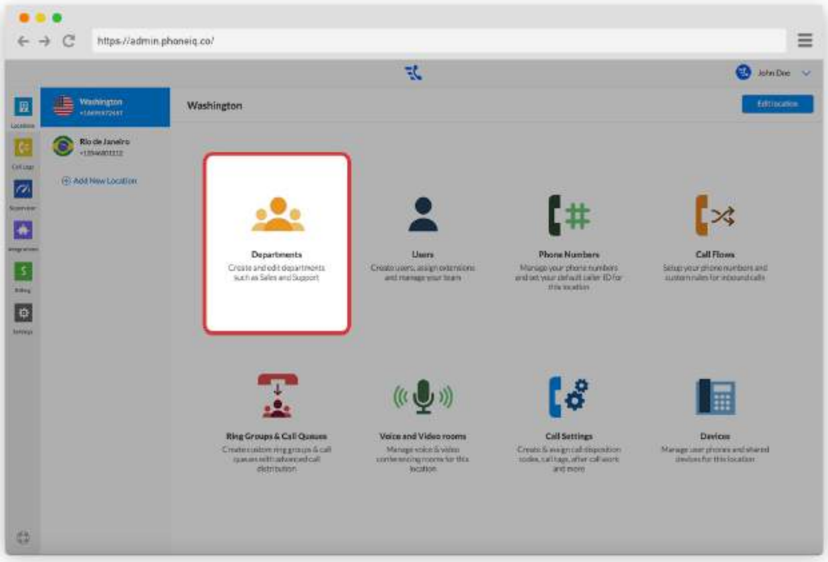
Departments allow administrators to group users into teams. Departments are created within a location.

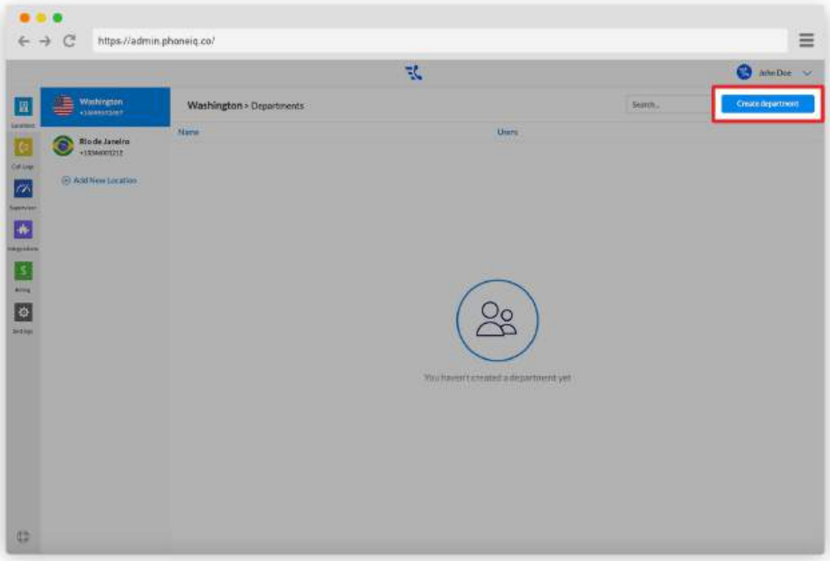
3.1 Create Department

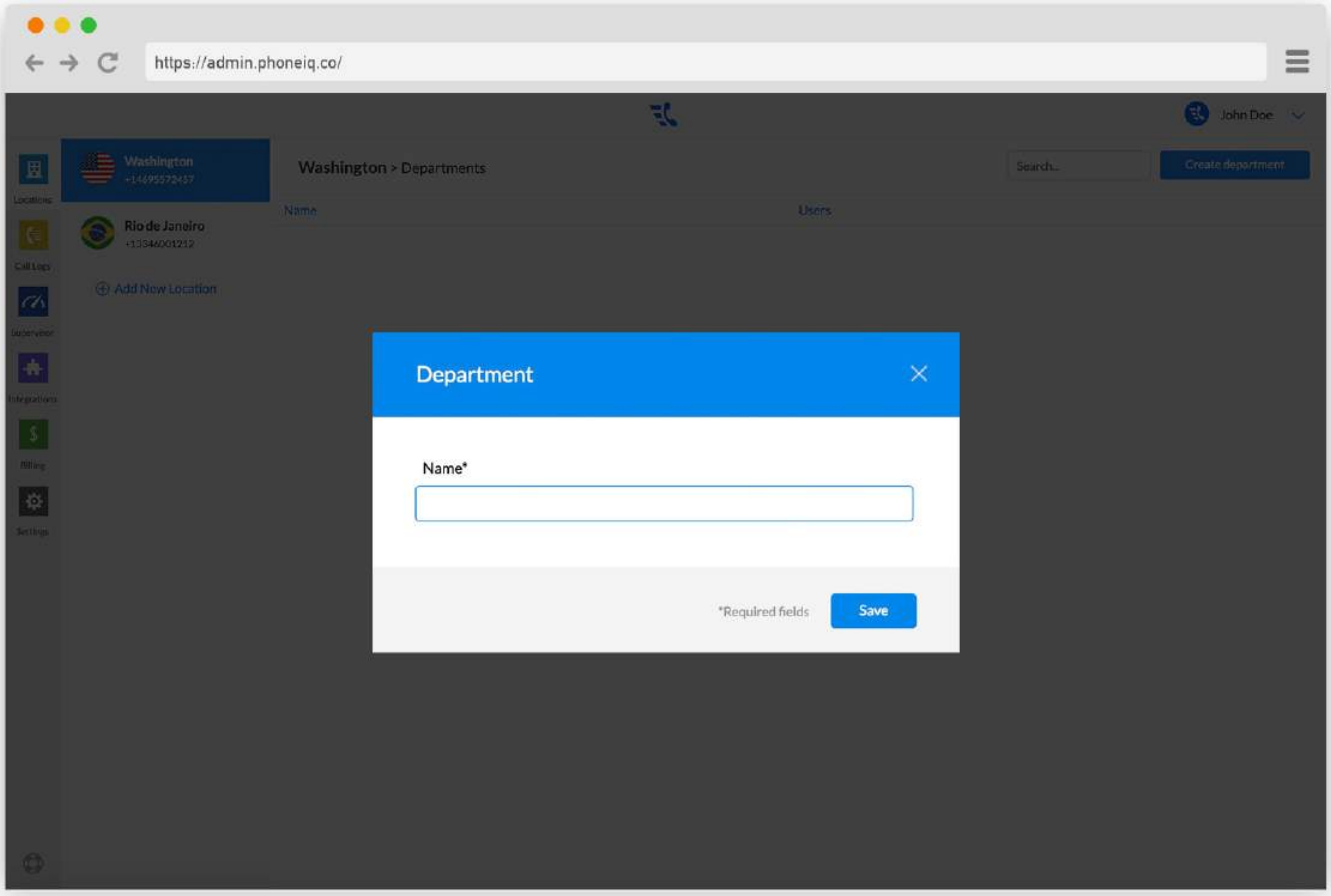
In order to create a department, select the option departments within the desired location and click the button create department.
Complete the form with the departments name.

Once created you can assign users to the available departments from the users view within a location. Users can only be assigned to one department.

Departments are not required.







4. Users

Description:

Users have two system roles:

Admin: Can access both the end user apps and administrator portal

Agent: Can only access the end user apps.

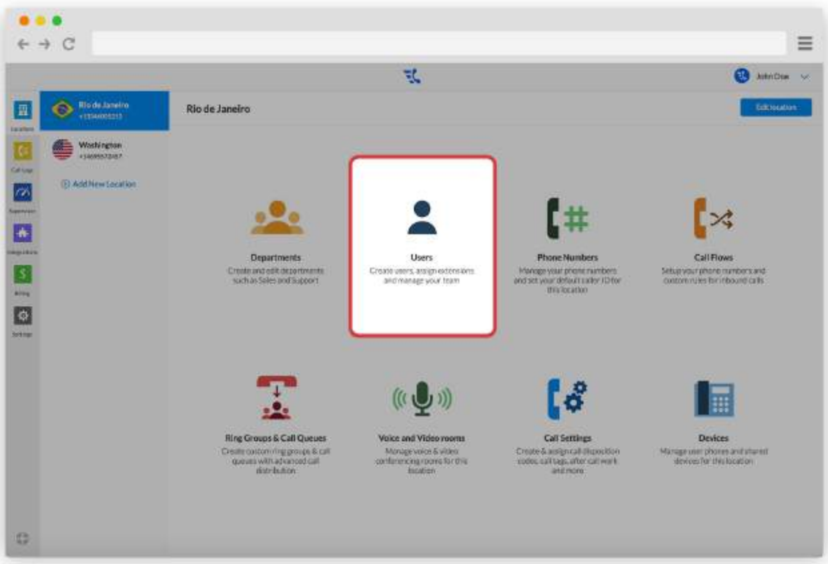
4.1 Create users

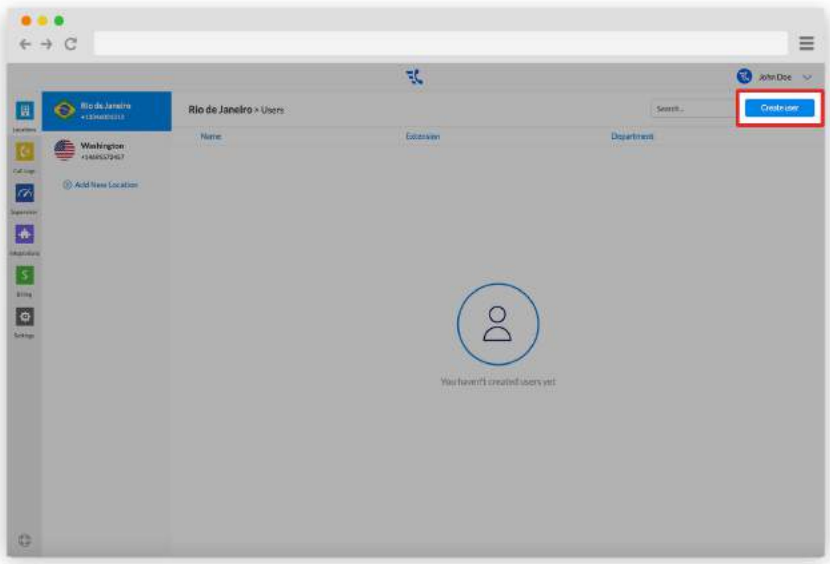
a) Access the users view, within the desired location.

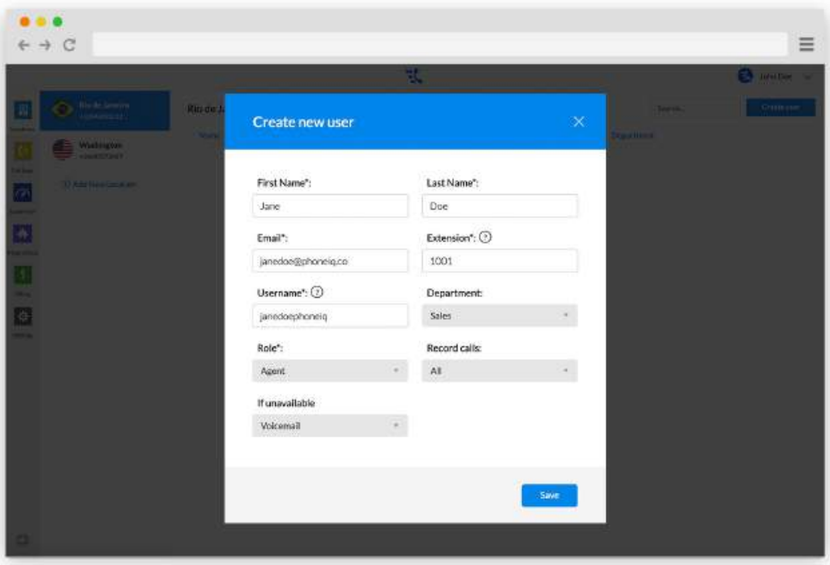
b) Click on create user.

c) Complete the form with the following information: First Name, Last Name, Email, Extension Number, Department (optional), Role, Call Recording and Call Handling rules when the user is unavailable.

d) If the account has personal numbers enabled for each user, choose a personal phone number.







* Users will receive an automatic email with a link to setup up their password and download the corresponding apps.

Apps can be manually downloaded from the following

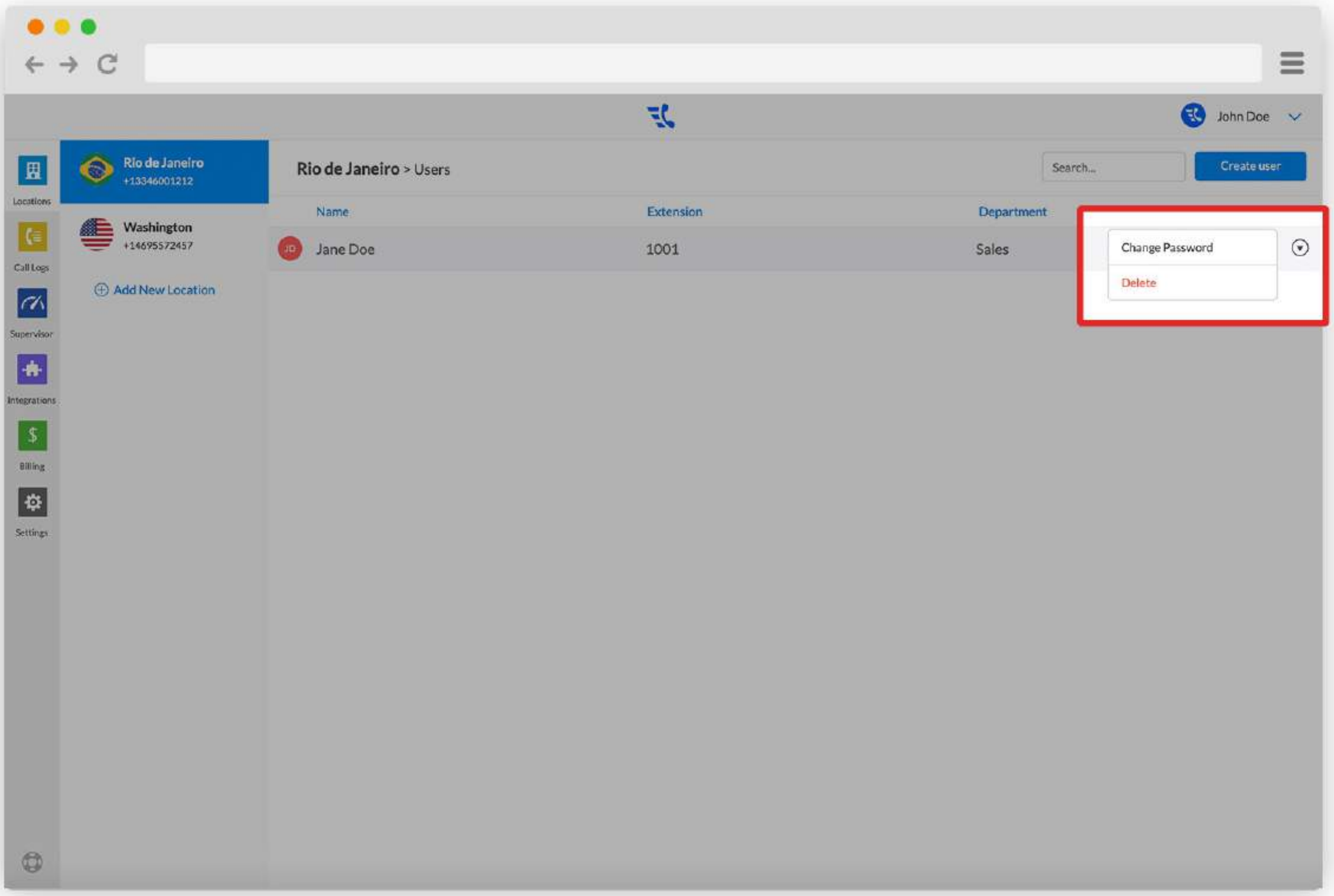
URL: https://www.phoneiq.co/apps

4.2 Edit User:

To edit a user, click on a user within the users view.

4.3 Delete User:

To delete a user, visit the users view within the desired location and hover the cursor over the user. A menu menu located on the right handside will appear and when clicked will prompt the option to change password.



4.4 Restore a Users Password:

To restore the password of a user, visit the users view within the desired location and hover the cursor over the user. A menu menu located on the right handside will appear and when clicked will prompt the option to change password.

5. Desk Phones:

Description:

Desk phone can be created, managed and provisioned from within the administrator portal, under the locations app and the “Devices” view. PhoneIQ offers two type of devices:

User Phones: Desk Phones assigned to individual users.

Shared Devices: Desk Phones that are not assigned to specific users, but rather are commonly used within conference rooms, reception areas, etc.

Desk Phones can be provisioned in two ways:

Automatic Provisioning: If the brand and model of the Desk Phone is listed within the fully supported device list, administrators will be able to provision them automatically using PhoneIQ’s provisioning URL, requiring no manual input or configuration.

Manual Provisioning: If the brand and model of the Desk Phone is not listed within the fully supported device list but is a fully compliant SIP device, administrators will be able to manually provision the device using the SIP credentials prompted by the system.

5.1 User Phones:

In order to create user phones, the creation of users is required. Users will be able to handle calls from their PC and mobile by default using PhoneIQ’s apps, administrators can also assign Desk Phones when required.

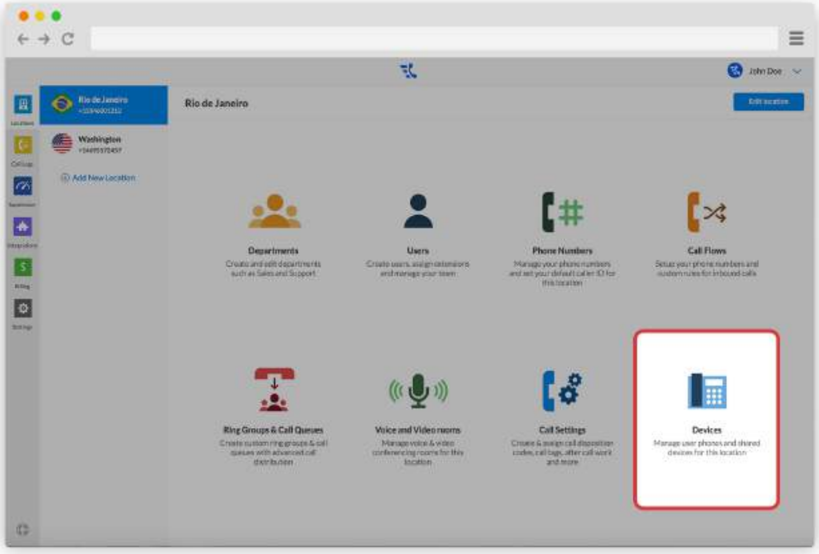
a) Access the Devices View within the desired location and click on “User Phones”

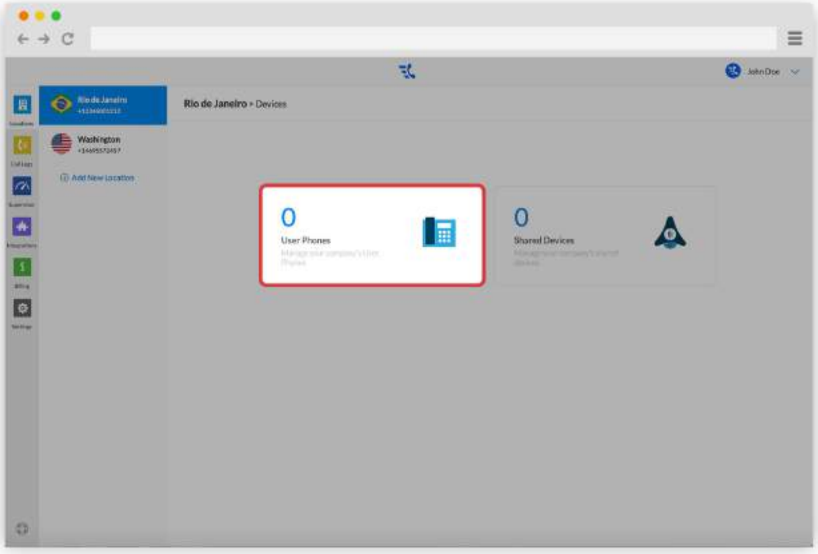
b) Select the option “Add Device”.

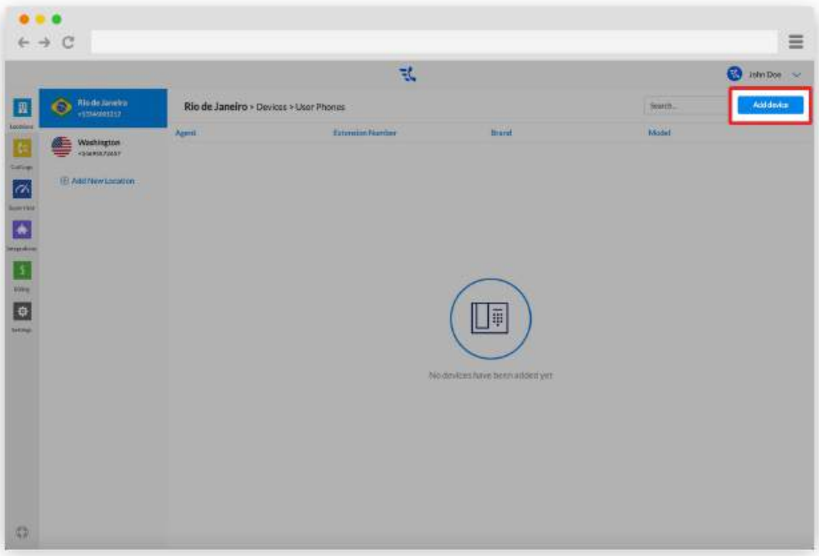
c) Select brand and model (if the Desk Phone’s brand and model is not within the fully supported device list, select the option “other”.

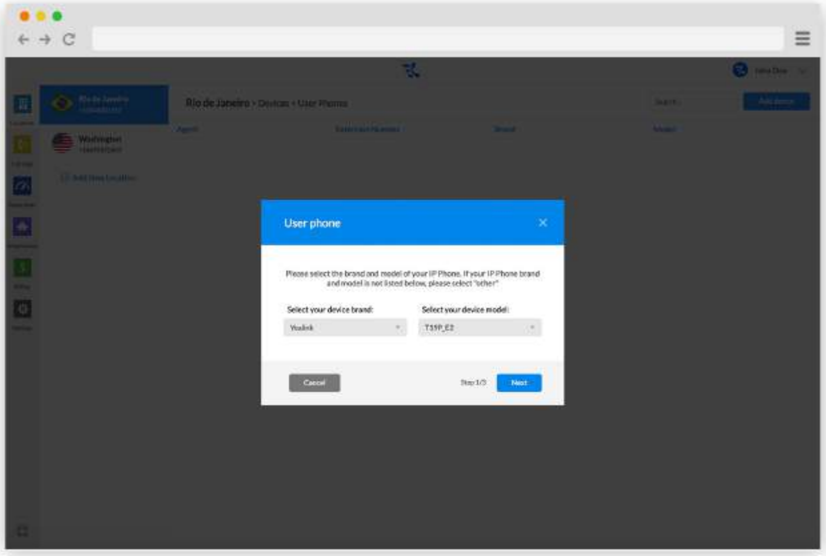
d) Select the user to whom which the device should be assigned and the Mac Address of the device (only in case the device is part of the fully supported device list).

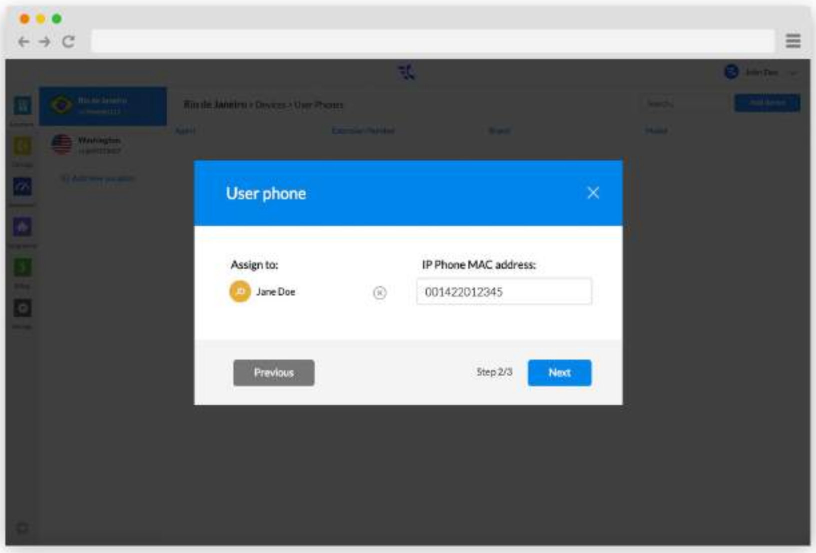
e) Once created, administrators should provision the phone in order to make it work (visit section 5.3 and 5.4 for automatic and manual provisioning instructions.

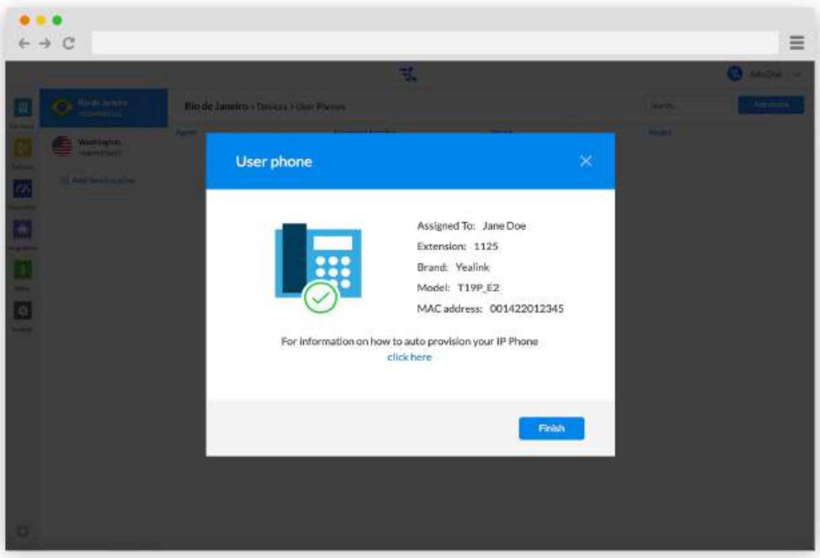












5.2 Shared Devices:

Shared Devices can be created by assigning a Name and an Extension Numbers. These devices don't have a voicemail box nor they provide access to the different Unified Communications Apps.

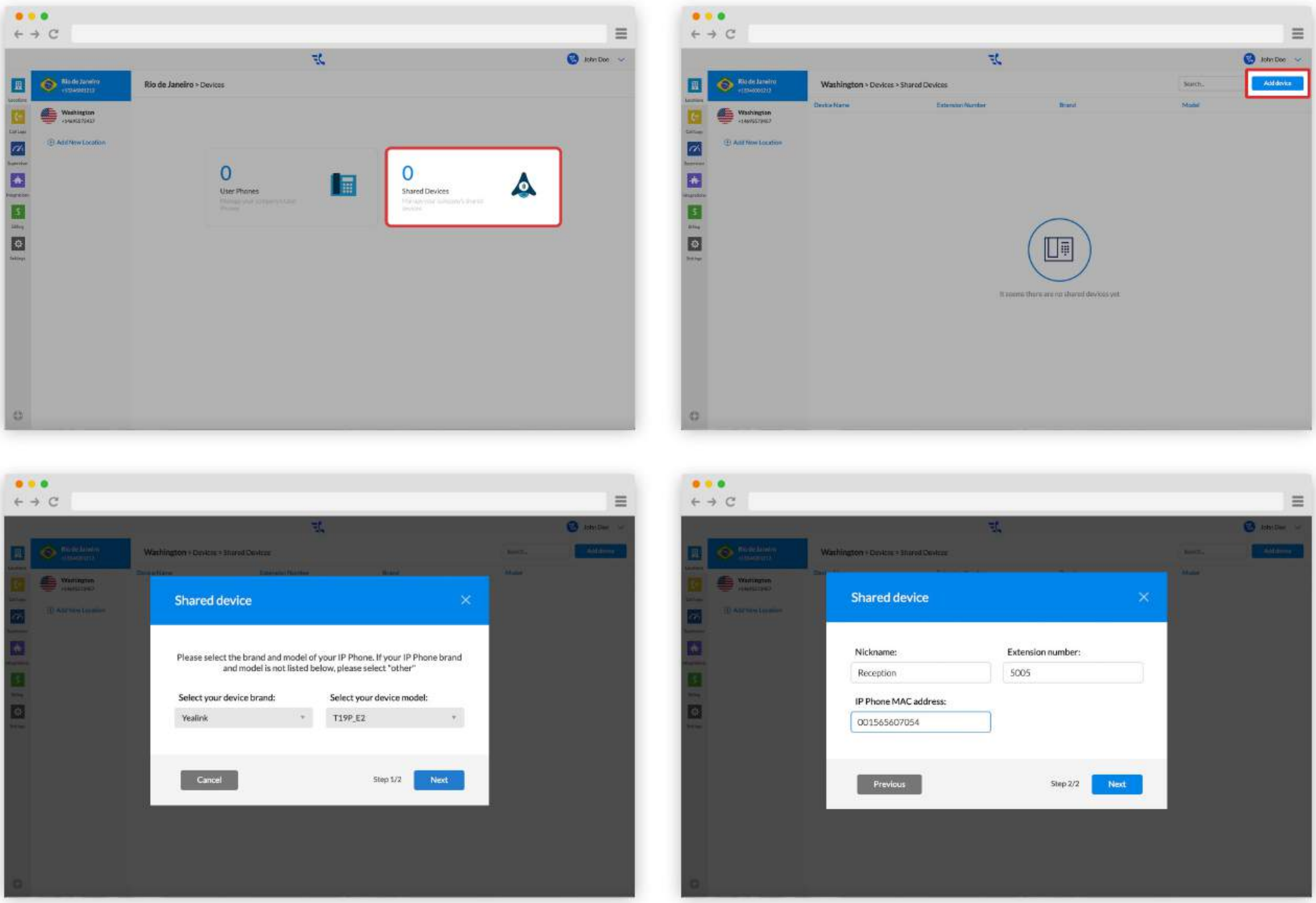
f) Access the Devices View within the desired location and click on “Shared Devices”

g) Select the option “Add Device”.

h) Select brand and model (if the Desk Phone’s brand and model is not within the fully supported device list, select the option “other”).

i) Assign a Nickname to the Device, Extension Number and Mac Address of the device (only in case the device is part of the fully supported device list).

j) Once created, administrators should provision the phone in order to make it work (visit section 5.3 and 5.4 for automatic and manual provisioning instructions.



5.3 Automatic Provisioning:

For Desk Phones that are part of the fully supported device list, automatic provisioning is available. Yealink devices should be added to the Yealink RPS service, if they weren’t added please contact support@phoneiq.co and request them to be added before provisioning starts.

a) Create a device in PhoneIQ with a valid 12 digit mac address (usually found on the back of desk phones).

b) Connect the phone to the public internet.

c) If the Phone wasn't added to the Yealink RPS service, find the private IP address of the phone using the Desk Phone's physical display.

d) Enter the private IP address into your PC's web browser (note that the pc and phone should be within the same network).

e) Login to the Desk Phone using the credentials for your account. The username is "admin" and the password can be found in PhoneIQ's admin portal, under the settings app and company settings tab, click on the eye to see your account's "provisioning password".

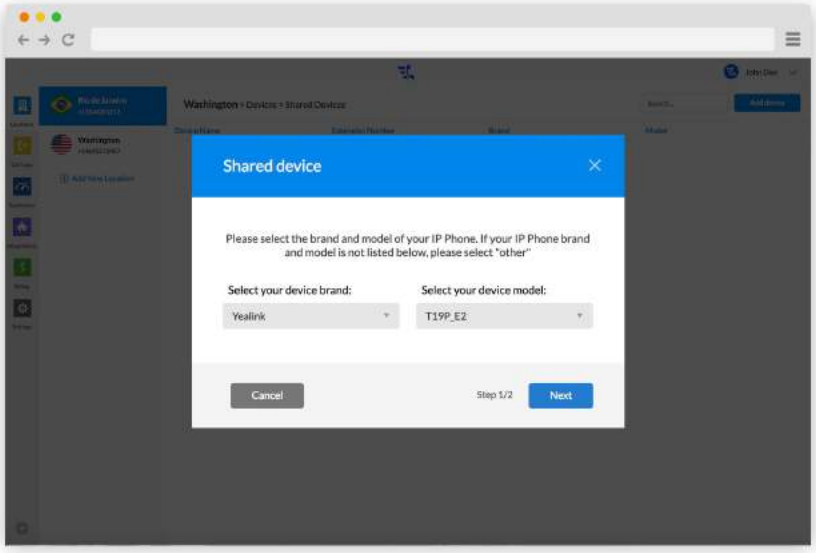
f) Once you have access to the desk phone's web interface, visit the settings tab and select the "Auto Provision" view.

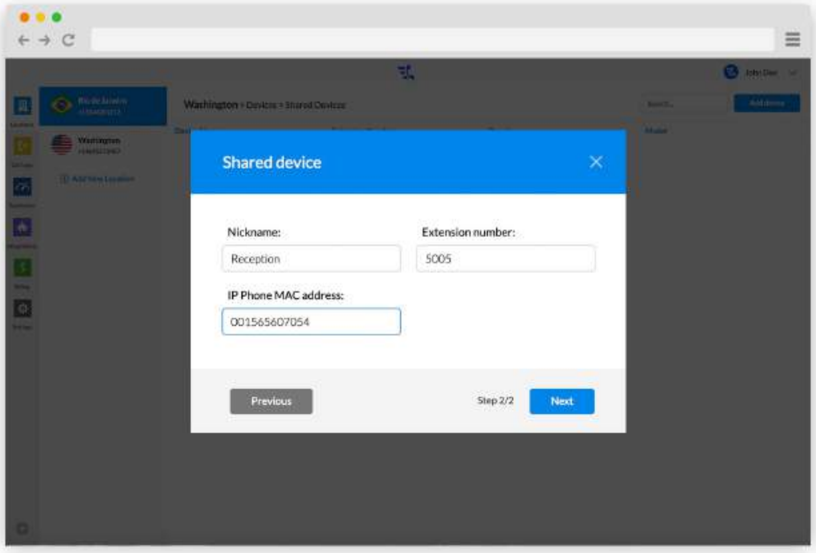
g) Enter the PhoneIQ's provisioning URL in the "Server URL" field and select the option "Autoprovision now" - http://app.phoneiq.co:9090/Prov/Credentials

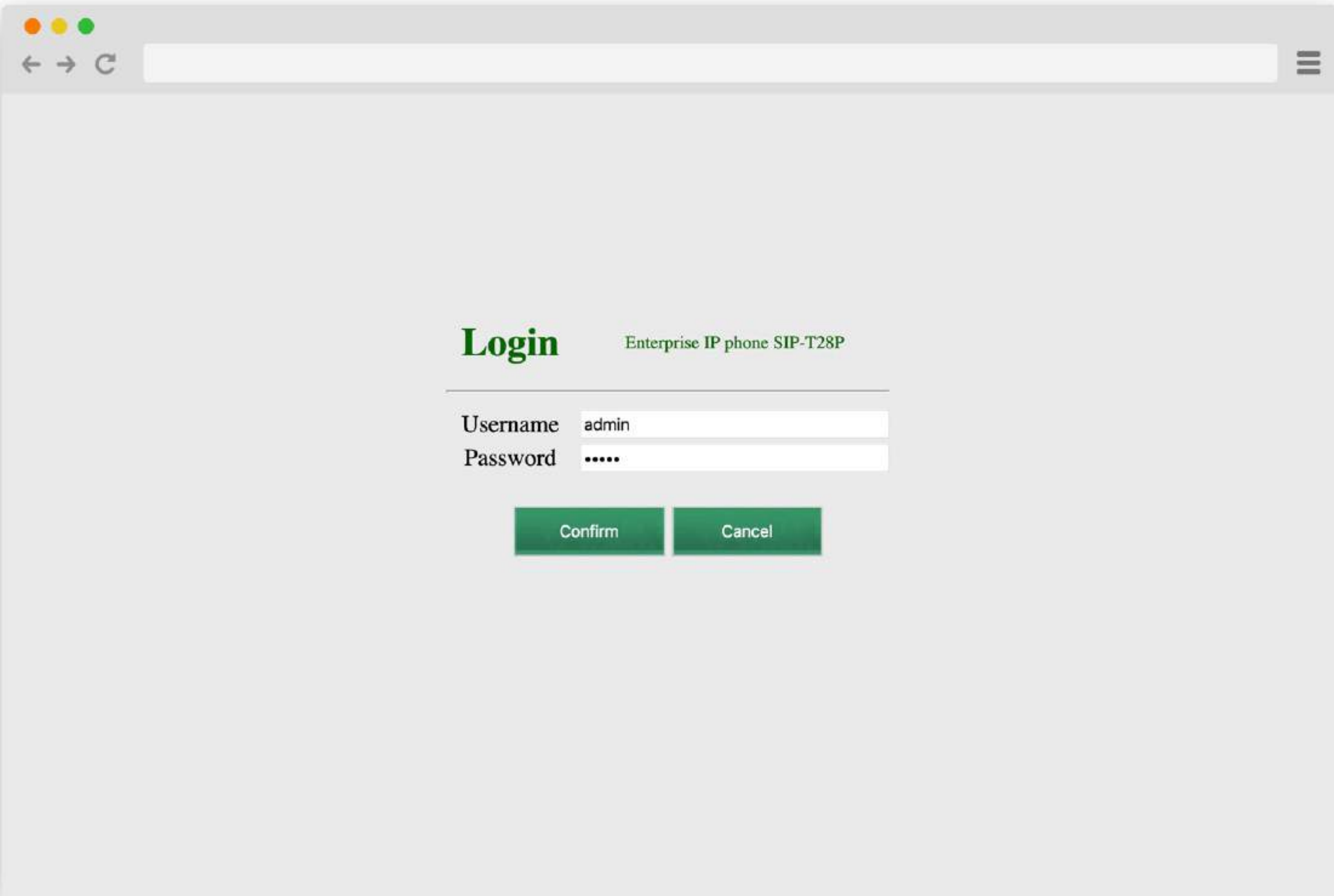
h) Once this initial phase of provisioning is completed, reboot the phone to start Phase 2 of the provisioning process.

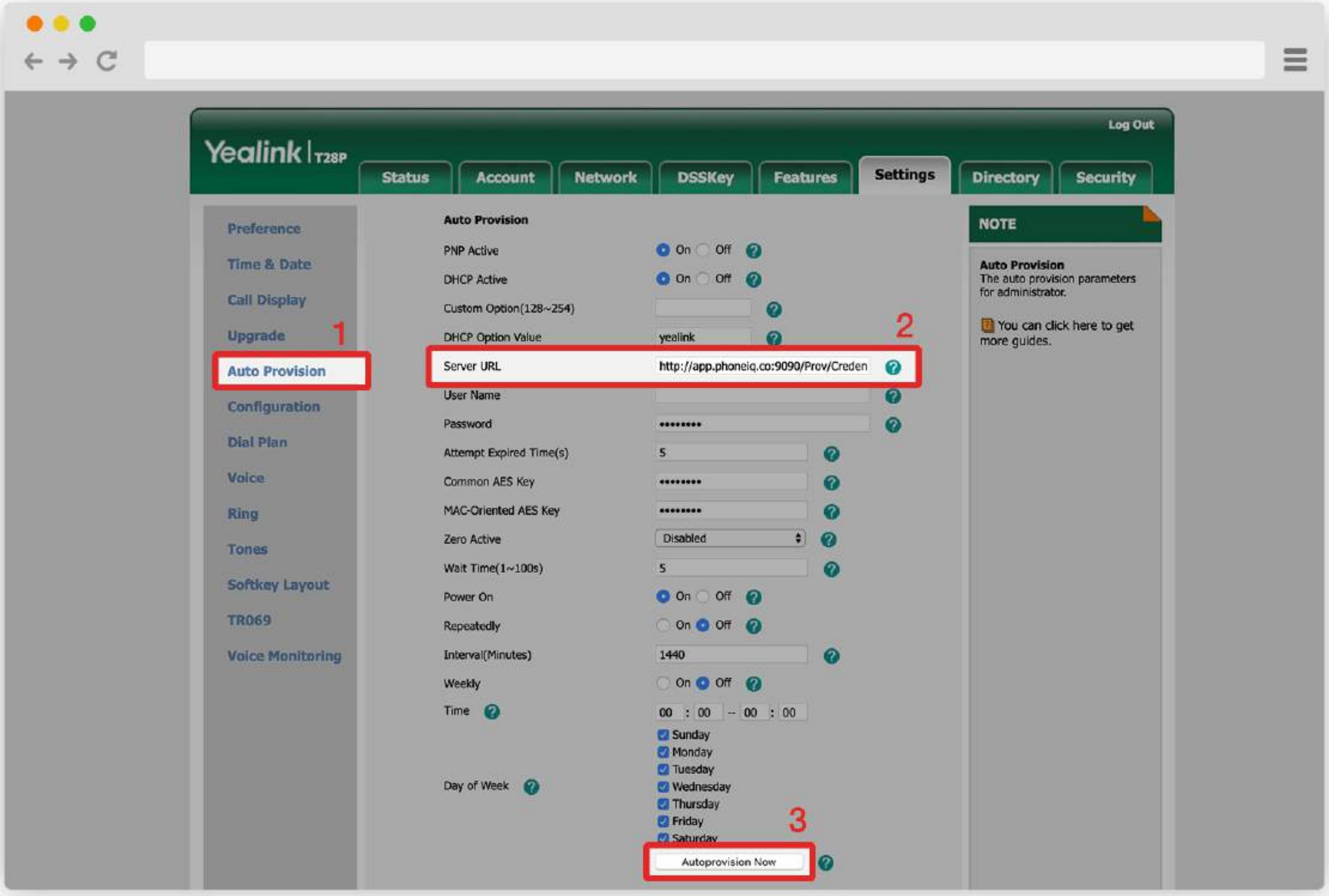
i) Once rebooted the desk phone will be ready to use.


Yealink
Status
1. IPv4: 192.168.5.135
2. MAC: 00:15:65:84:62:79
3. Firmware: 45.80.0.20
4. More...
Back
T27P


Shared device
Please select the brand and model of your IP Phone. If your IP Phone brand and model is not listed below, please select "other"
Select your device brand:
Yealink
Select your device model:
T19P_E2
Cancel
Step 1/2
Next


Shared device
Nickname:
Reception
Extension number:
5005
IP Phone MAC address:
001565607054
Previous
Step 2/2
Next


Login
Enterprise IP phone SIP-T28P
Username
admin
Password
•••••
Confirm
Cancel



5.4 Manual Provisioning:

For Desk Phones that are not part of the fully supported device list but are fully SIP compliant, manual provisioning is available.

a) Create a device in PhoneIQ with the brand and model selected as "Other".

b) Once the device is created, copy the SIP credentials (SIP Username, Password and Domain).

c) Connect the phone to the public internet.

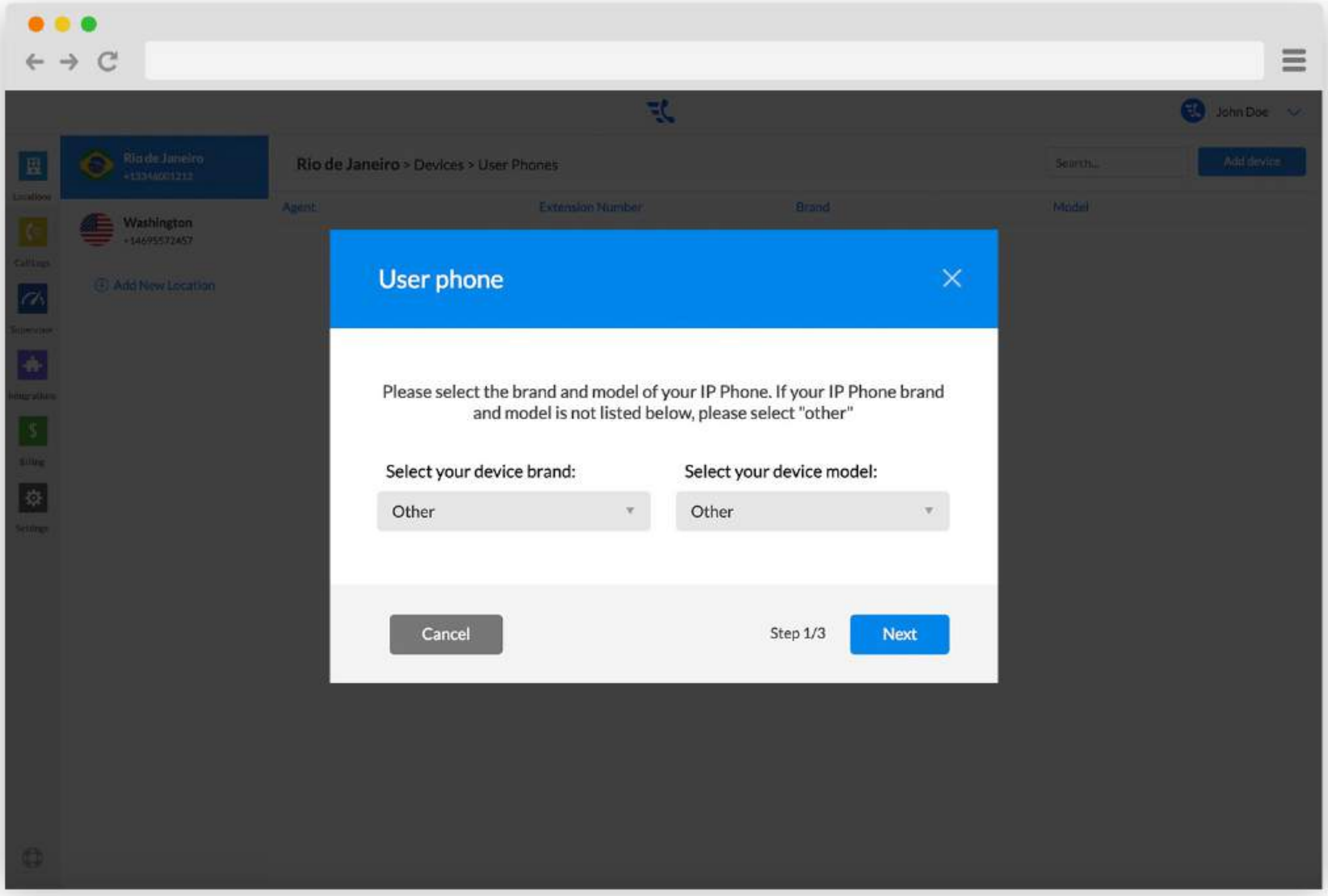
d) Using the Desk Phone's physical display, find the private IP address of the phone.

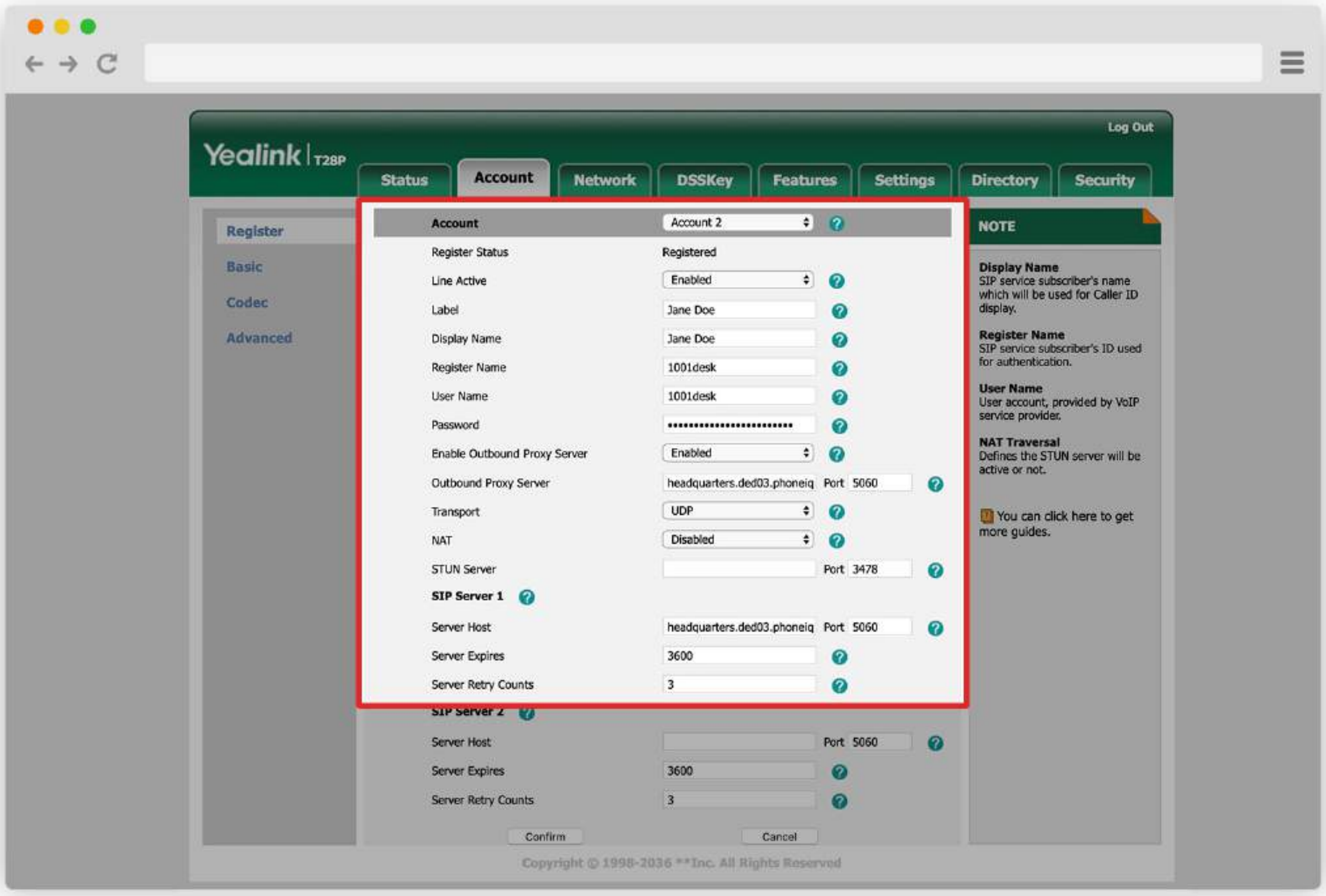
j) Enter the private IP address into your PC's web browser (note that the pc and phone should be within the same network).

k) Login to the Desk Phone using the Desk Phone credentials, usually they are "admin" for both username and password, we highly recommend administrators change these default credentials for all desk phones that not using the Automatic Provisioning system.

l) Complete the following fields from within the Desk Phones web interface and click provision: Label (Name for the account), Display Name (The name for the SIP account, will probably show on the phone's physical display), Register Name (SIP Username), User Name (SIP Username), Password (SIP Password), Server Host (SIP Domain).

m) Provision the device and check that it has successfully registered with PhoneIQ's telecom platform.





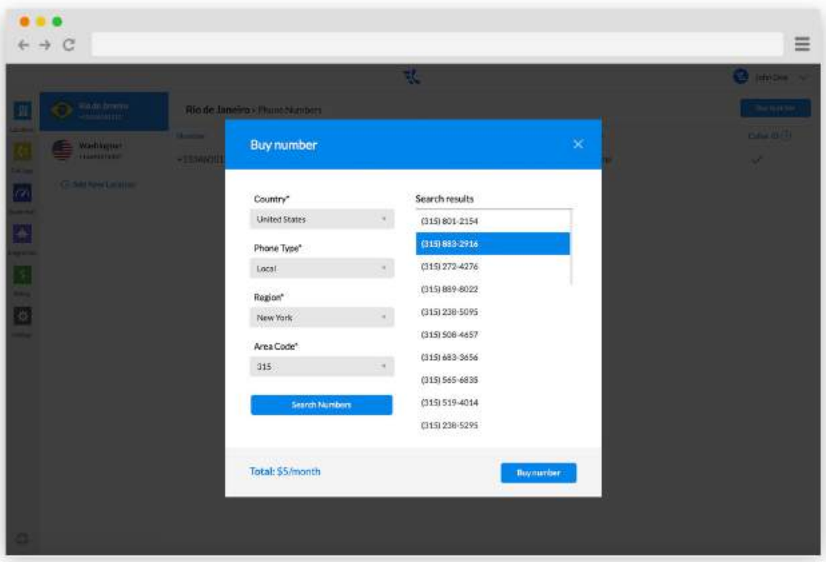
6. Phone Numbers:

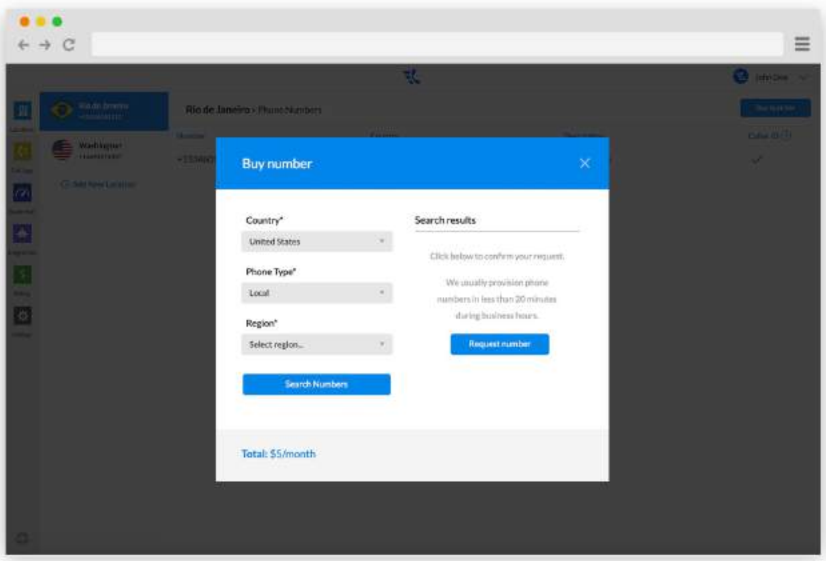
Description:

The Phone Numbers view will display all Phone Numbers assigned to either the location or users within the location. Administrators should select a specific Phone Number as the "Default Caller ID" for all users within a location. If users don't manually change their caller ID, or the location hasn't been set so that users have their personal number as the default caller ID, the default caller ID will be the number presented to callee's by default. Administrators will be able to port existing numbers by emailing support at support@phoneiq.co, and specifying the Number, Carrier, Country, Area Code in the request. Number Porting Requests will be review by our team and will be either approved or rejected based on Countries and Carriers. Administrators can also buy new phone numbers, which will be provisioned and fully operational instantly.

6.1 Buying a new phone number:

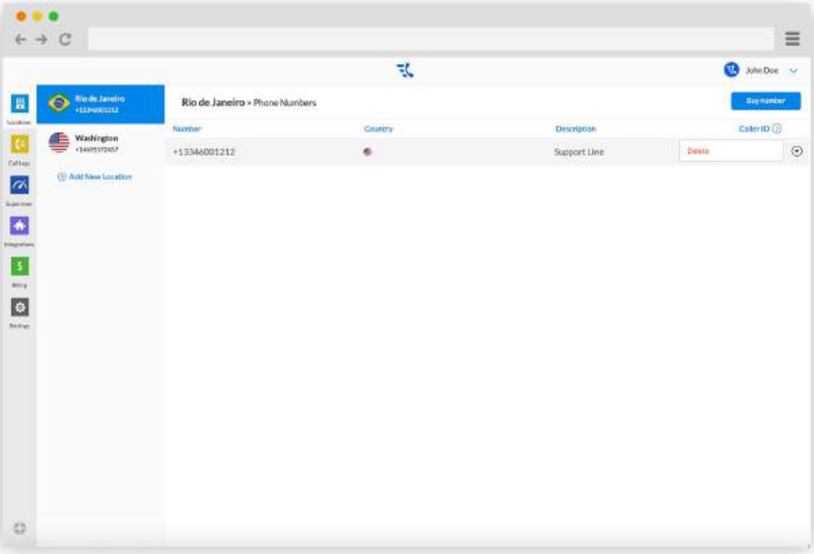
In the Phone Numbers view, within the locations app, select the option "Buy Number". Once selected, choose the Country, Number Type (Local, National, Toll Free) and Area Code if applicable and perform a search. Available Numbers will appear within the search results, allowing you to select the number you prefer. If the country selected doesn't support automated provisioning, please select the Request Number option and our support will provision the number usually within 20 minutes during regular business hours.

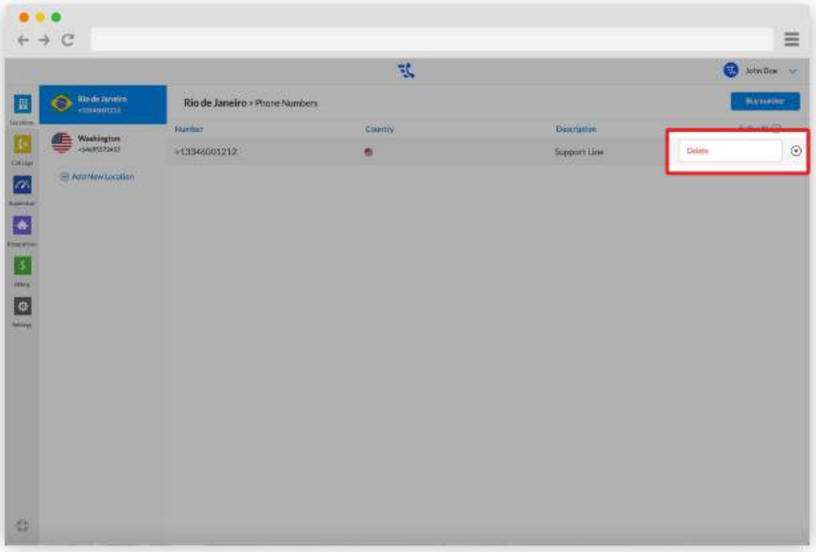




6.2 Deleting an existing phone number:

In the Phone Numbers view, within the locations app, hover the cursor over the desired number. Click on the arrow menu on the right handside and select the option delete.



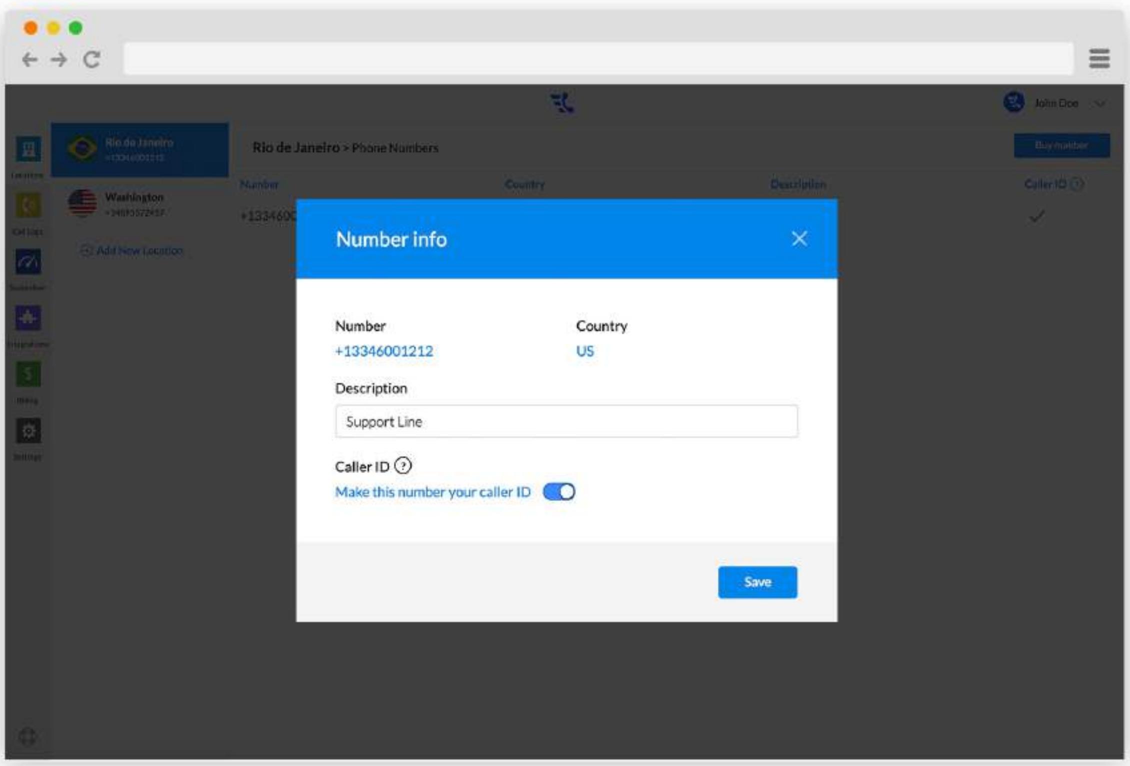


6.3 Modifying the location's default caller ID:

a) In the Phone Numbers view, within the locations app, click on the number you want to set as the default caller ID for all users assigned to that location.

b) Choose the option "Make this number your default caller ID" and press save.

Note that this procedure might take some time to process based on the number of users assigned to the location.

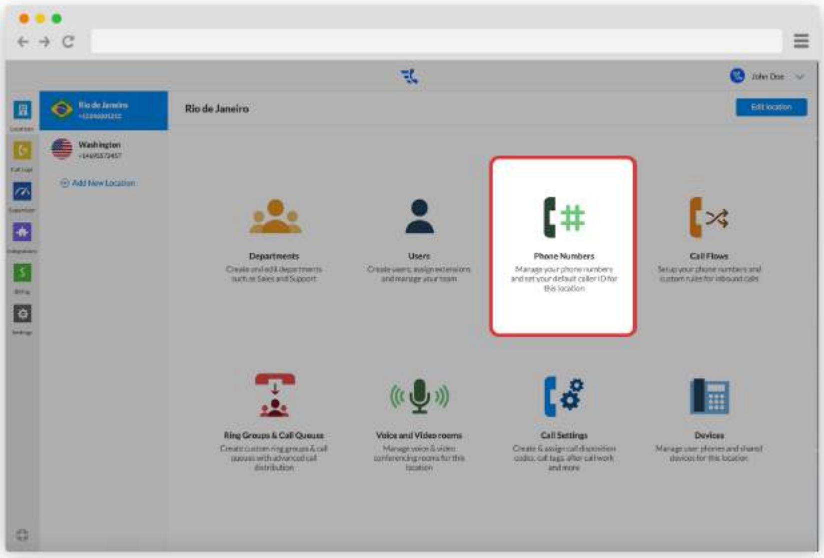


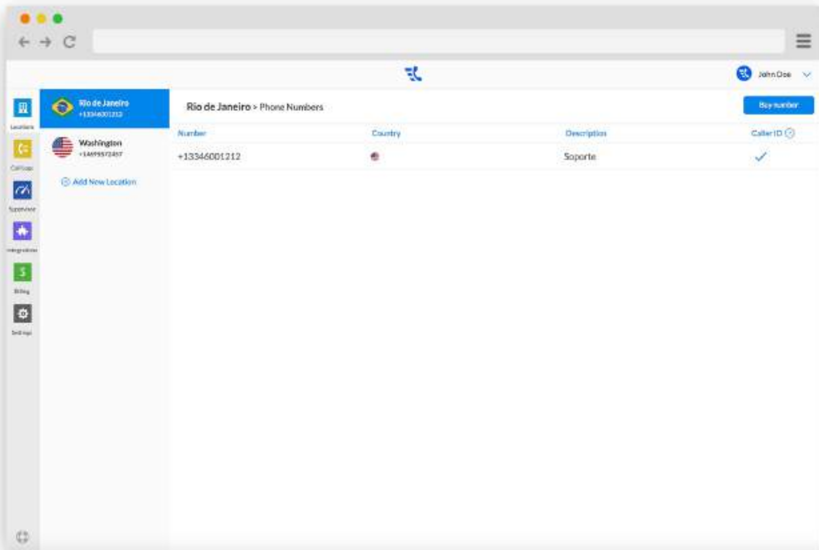
6.4 Phone Number Description:

Administrators can add descriptions to phone numbers, making it easier to both them and end users to recognize specific phone numbers like: Support, Sales, Main Line, etc. In order to change a Phone Number's description:

a) Access the Phone Numbers view, within the locations app and click on the number you want to edit.

b) On the Phone Number form edit the description and click save.





7. Ring Groups:

Description:

Ring Groups allow administrators to group multiple users under one particular extension, making their devices ring using either a cascading or simultaneous strategy. Ring Groups are ideal for non call center environments, where more sophisticated call distribution technology is required.

7.1 Create Ring Group:

a) Access the Ring Groups & Call Queues view, within the locations app, and select "Ring Groups"

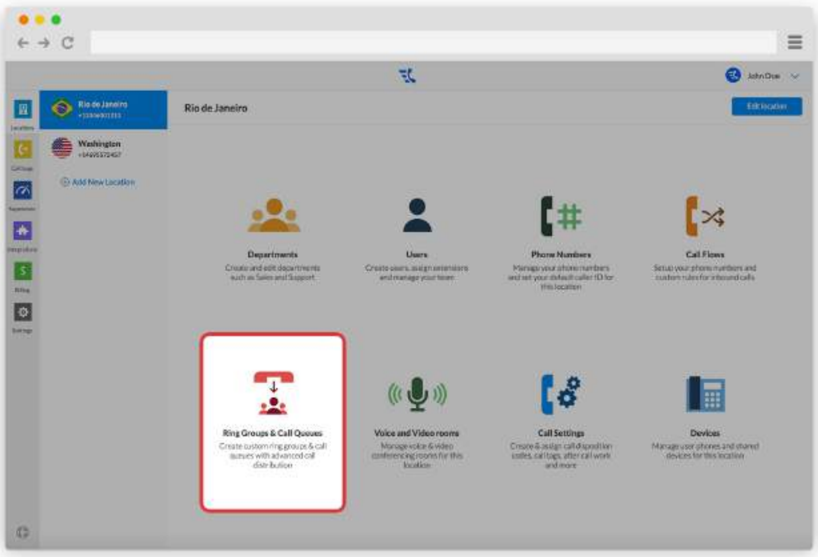
b) Select the option create ring group.

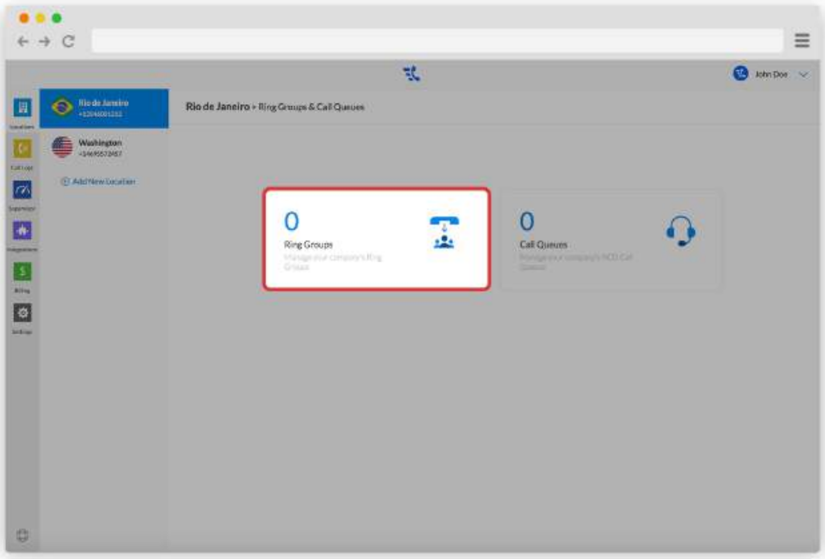
c) Assign a name, users and the extension number to the ring group.

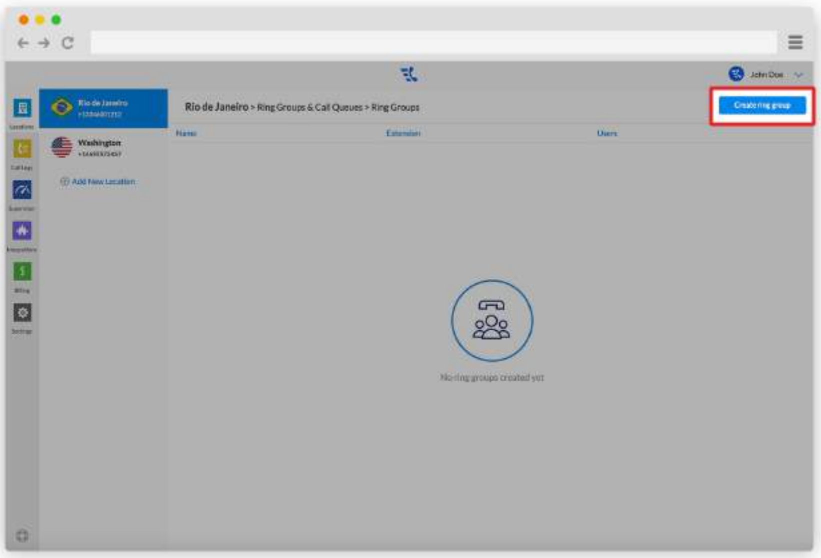
d) Select if you want to record inbound calls to the ring groups extension number.

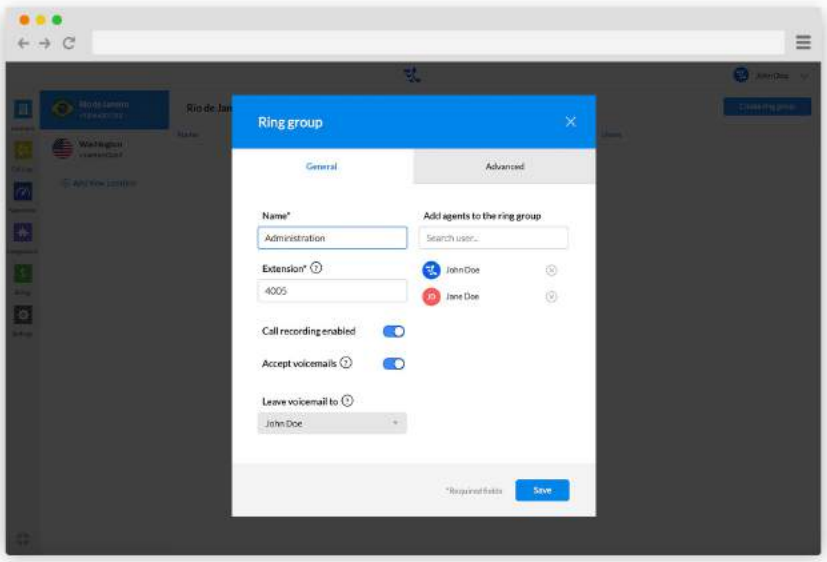
e) For missed calls choose between busy tone or voicemail, if voicemail is select decide which agent should receive the voicemail.

f) On the advanced tab select the call distribution strategy, choose between cascading or simultaneous ring.



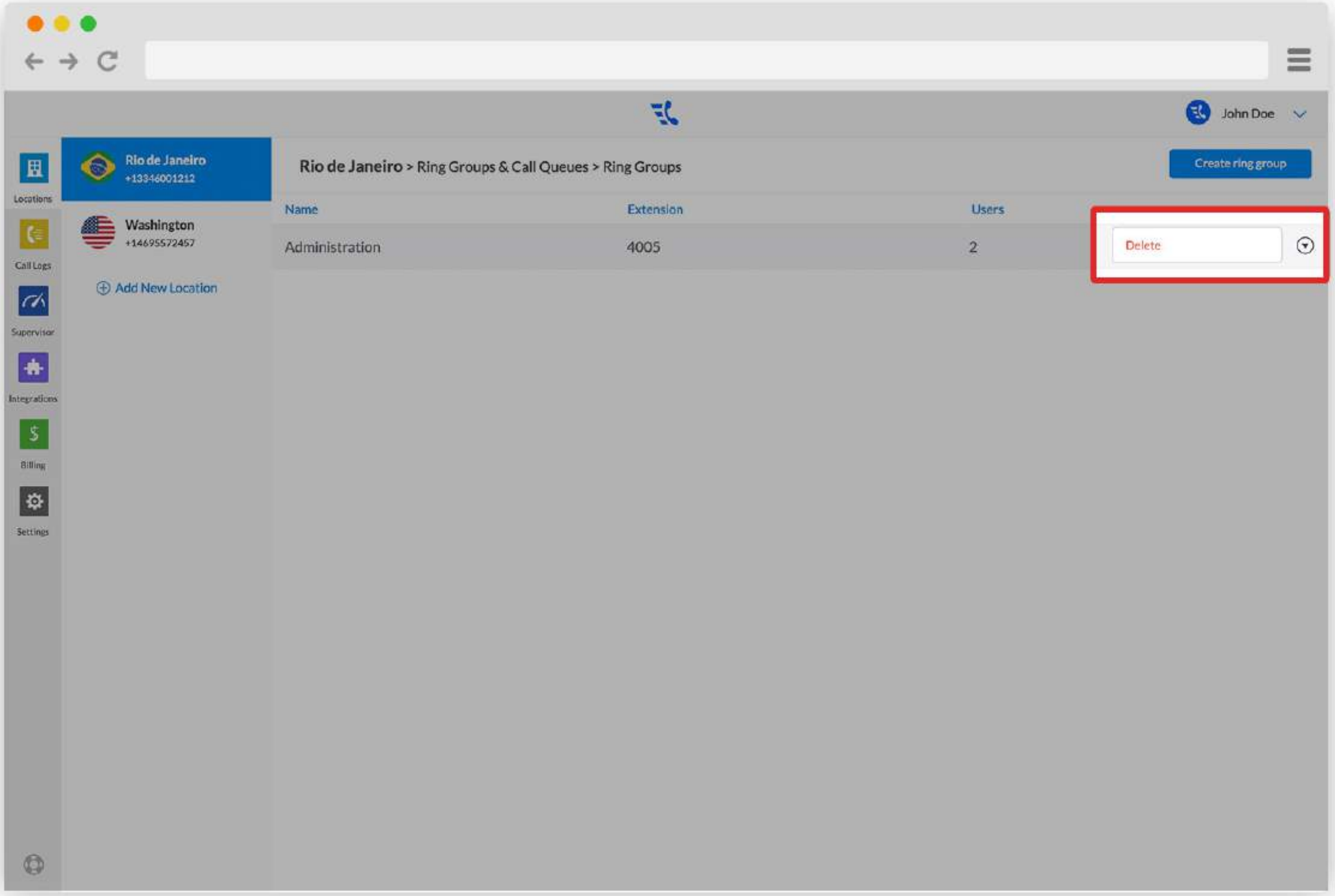






7.2 Delete Ring Group:

To delete a Ring Group access the Ring Group view, hover the cursor over the desired ring group, click on the menu located on the right handside and select the option delete.



8. Call Queues

Description:

Call Queues allow the administrator to group users under one extension, providing advanced call center technology to handle automated call distribution. Call Queues should be used for teams such as support, inbound sales, among others, that often manage a significant volume of inbound phone calls.

8.1 Create Call Queue:

a) Access the Ring Groups & Call Queues view, within the locations app, and select “Call Queues”.

b) Select the option create Call Queue.

c) Assign a Name, Extension Number and Users.

d) Default Music: Is the music on hold. Callers will listen to this music while they wait for an agent to respond. Audio files should be MP3 or WAV and should not exceed 5MB.

e) Call Distribution Strategy: Calls can be distributed among agents using Round Robin or Most Idle strategy.

f) Wrap Up Time: is the time in seconds that an agent has to complete their after call work.

g) Agent Ring Timeout: the amount of time in seconds the devices of an agent will ring before moving to the next agent.

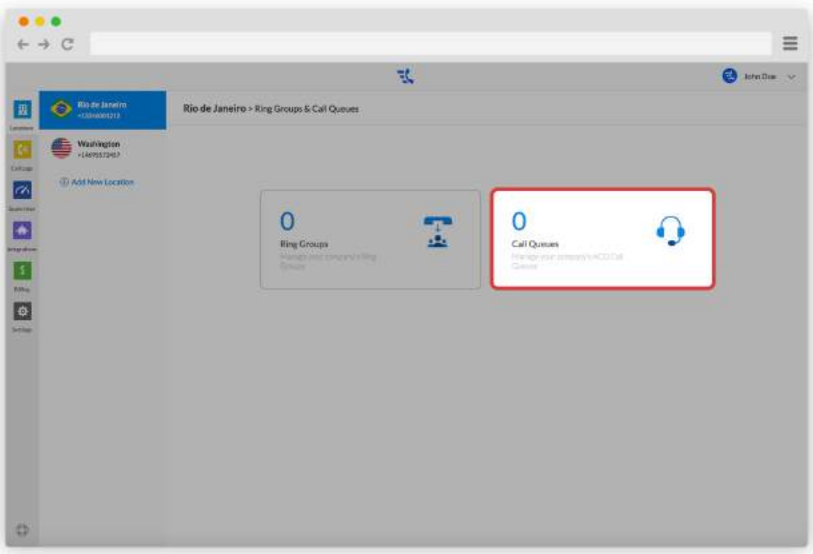
h) Max. Number of Calls: The maximum number of calls allowed within a specific queue. When the number of calls is exceeded, calls will move on to the next step defined in a call flow.

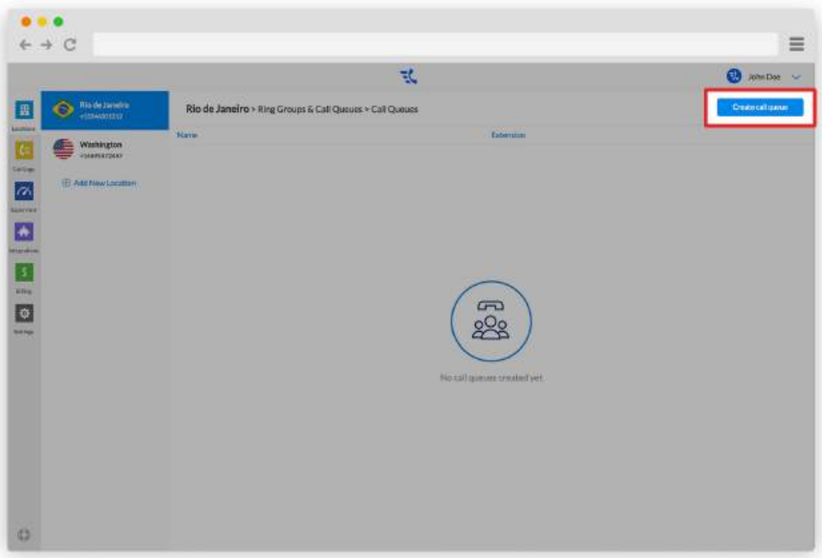
i) Max. Hold Time: The maximum time in seconds a call will remain on hold before exiting the queue and moving on to the next step defined in a call flow.

j) Service Level: The percentage of calls answered within a specific time frame defined in seconds by the administrator. For example an administrator might define that his service level target is to answer 85% of calls within the first 20 seconds.

k) Allow callers to enter the queue even if no agents are available: This option will allow calls to be enqueued although there are no agents logged in.

l) Call Recording Enabled: Record all inbound calls to the queue.





8.2 Delete Call Queue:

To delete a Call Queue access the Call Queues view, hover the cursor over the desired call queue, click on the menu located on the right handside and select the option delete.

9. Call Flows

Description:

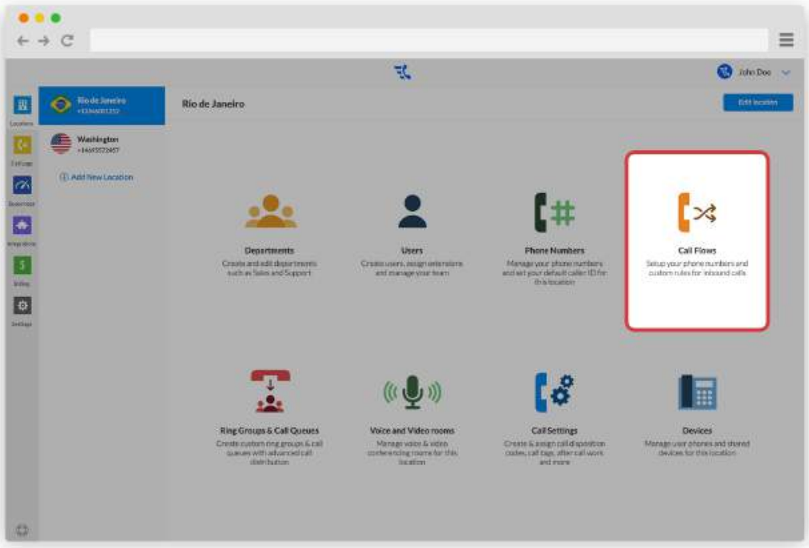
Call Flows are used to route inbound phone calls. Call flows can be very simple or highly complex. One or multiple Phone Numbers can be assigned to a specific call flow and administrators can create as many call flows as they want.

9.1 Create Call Flow:

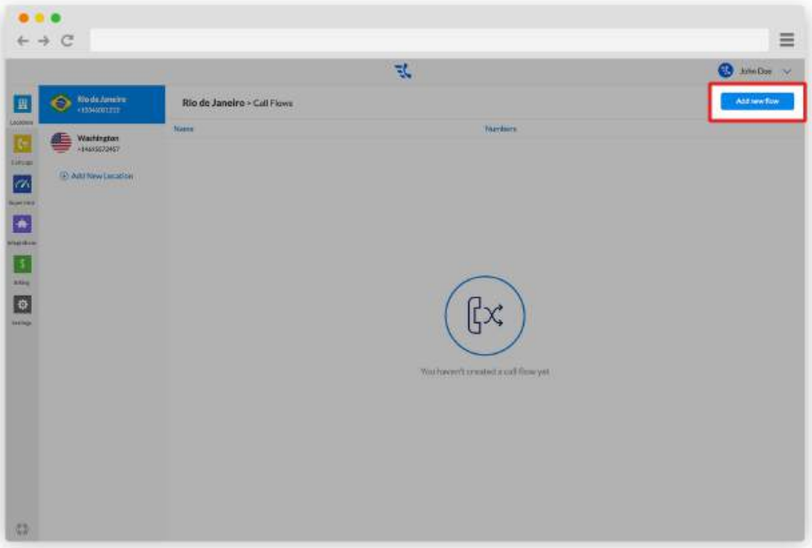
a) Access the Call Flows view, within the locations app.
b) Select the option Create Call Flow.
c) Complete the form by assigning a Name, Time Zone, Phone Numbers and selecting if you want to record all inbound calls.
d) Once the call flow is created, select the option to add business hours. You can create as many business hour rules as you need.

e) Once the business hours are added, drag and drop the different call flow actions from the right hand side menu into the corresponding slot (no slot should be left blank).
f) Once all business hours have been configured, administrators should proceed to setup routing rules for all unspecified hours.
g) Once all slots have been filled with call flow actions, click save.

a.



b.



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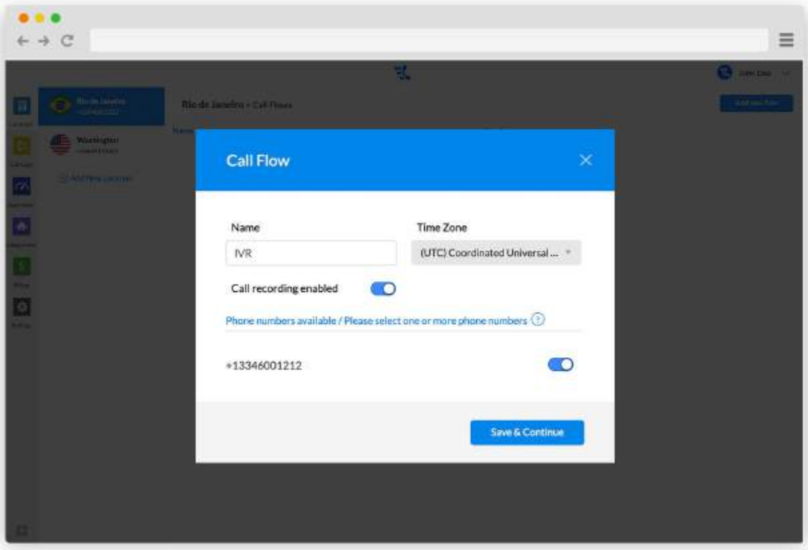

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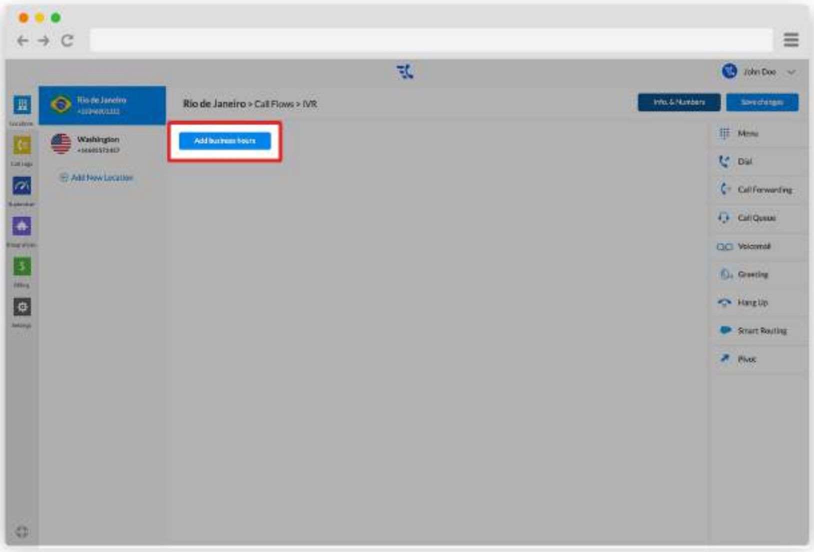
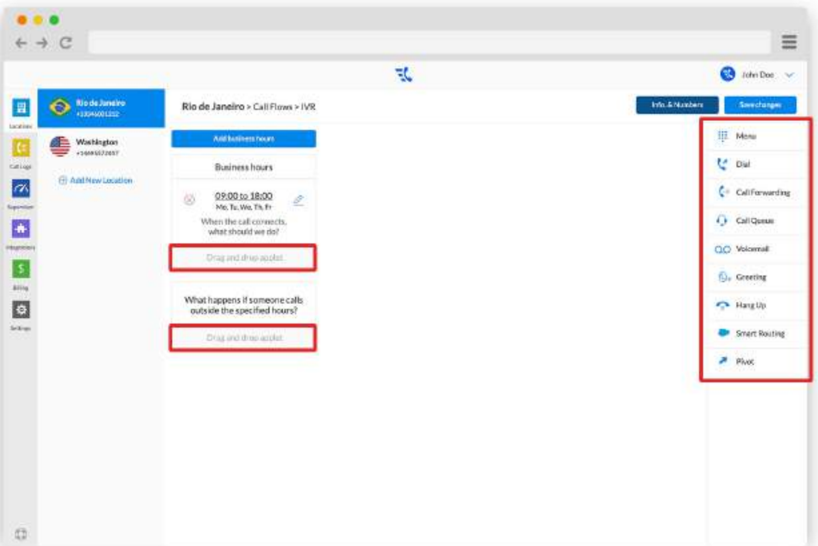


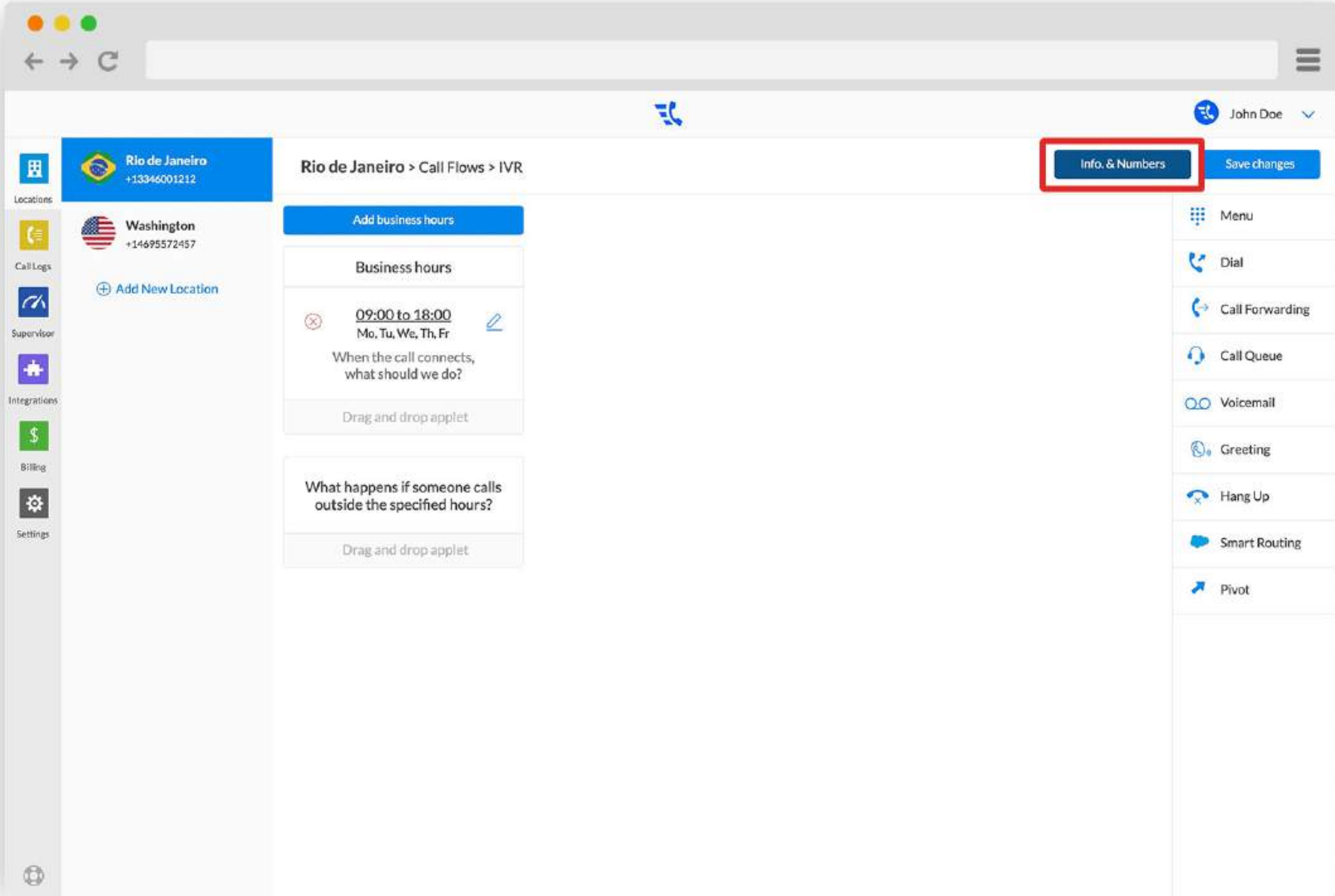
e. f. g.



9.2 Edit Call Flow:

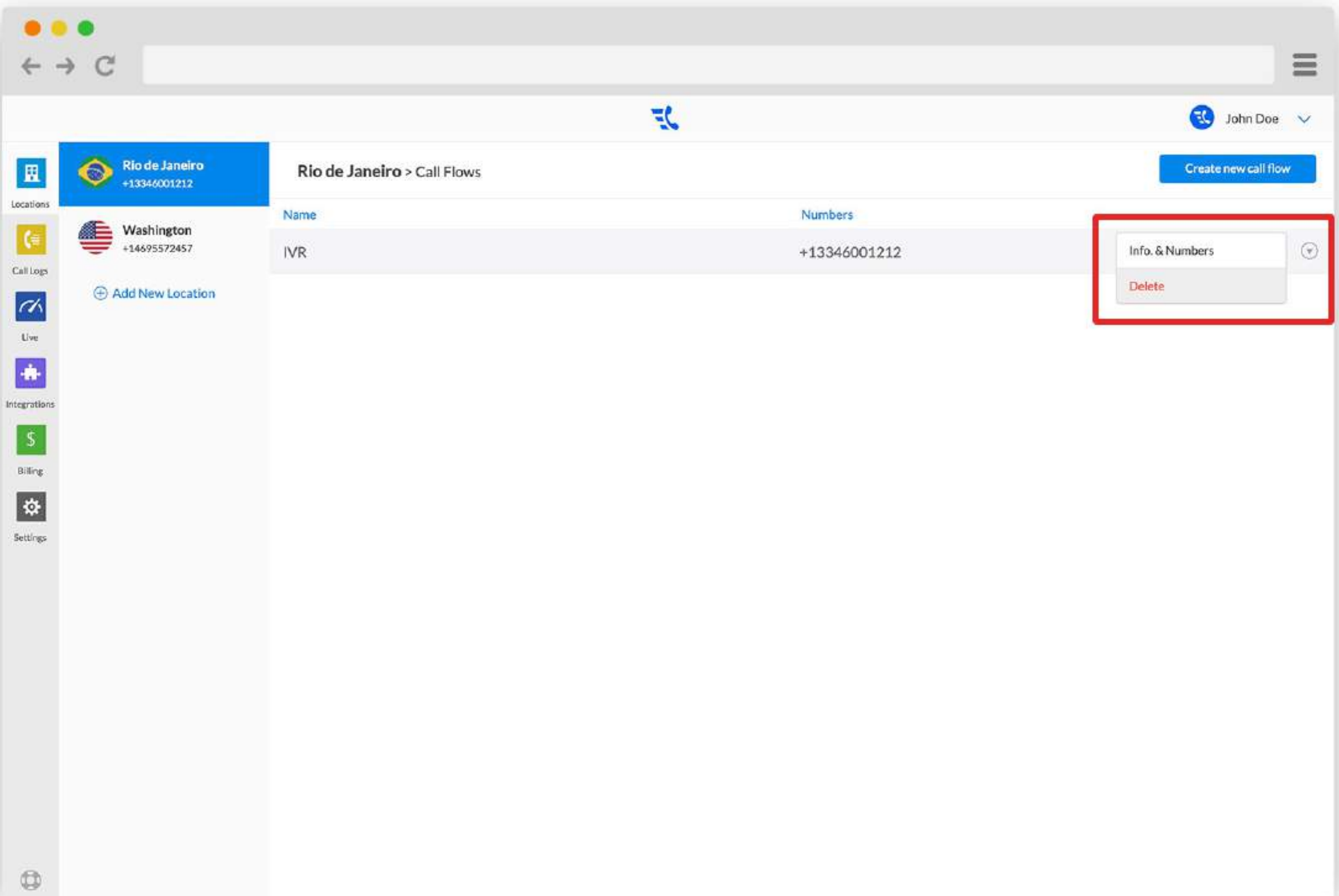
a) To edit the name, time zone, assigned phone numbers or call recording settings click on the call flow you want to edit and choose the option “Info. & Numbers”.

b) To edit the call flow routing rules, change the actions in the different slots and click save.



9.3 Delete Call Flow:

To delete a Call Flow access the Call Flows view, hover the cursor over the desired call flow, click on the menu located on the right handside and select the option delete.



9.4 Call Flow Actions:

9.4.1 Phone Menu:

A phone menu is the set of instructions that you normally hear when you connect via phone with a company “press 1 for sales, press 2 for support”. Extension dialing is enabled by default.

a) Greeting: The menu greeting is used to provide instructions to the caller. Administrators can choose between pre recorded audio files (limited to 5 MB, MP3 or Wav format) or text to speech audio in multiple languages.

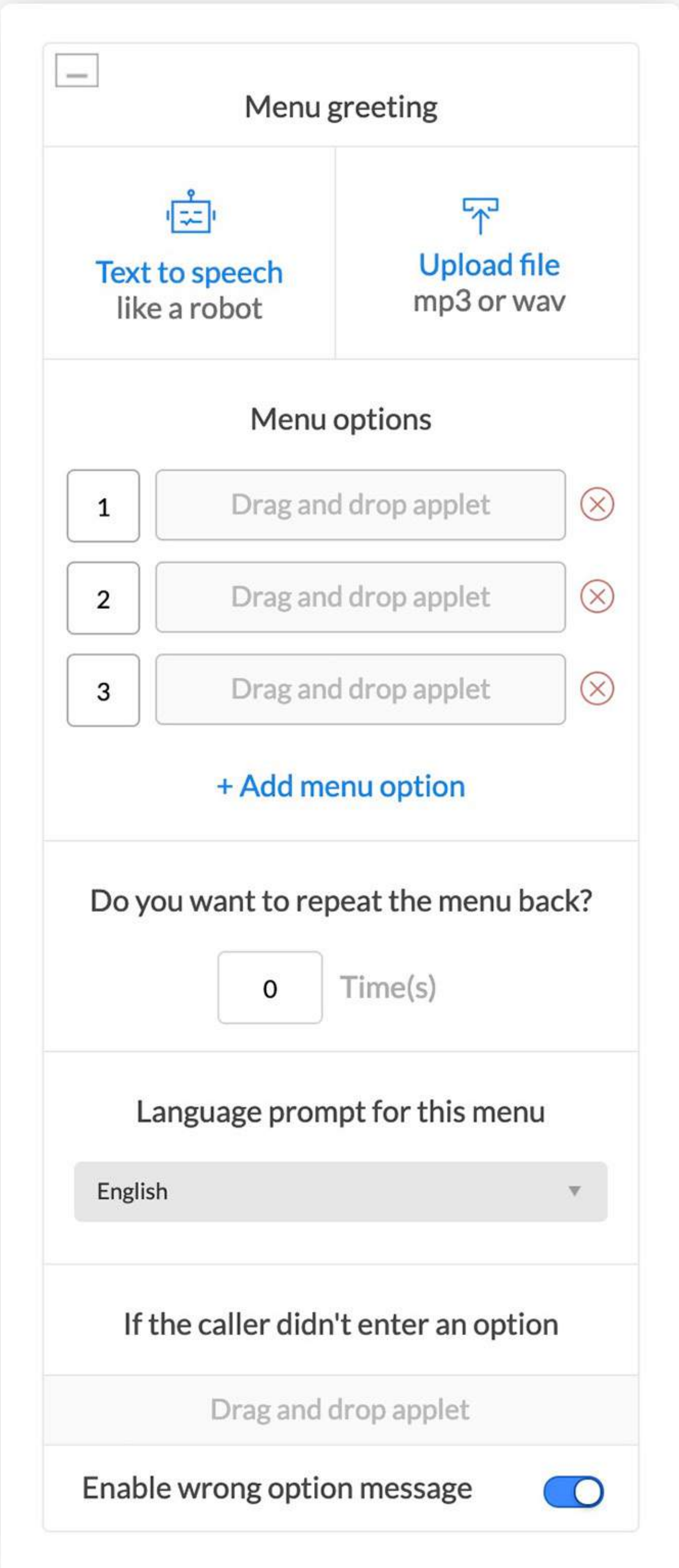
b) Options: Are the different set of menu options defined to route calls. Menu options can range from 0 to 9 and allow to configure any call flow action.

c) Repeat Greeting: The amount of times you want to repeat the message if the caller hasn’t entered a valid option.

Prompts Language: The language used in automatic messages, e.g.: invalid entry, etc.

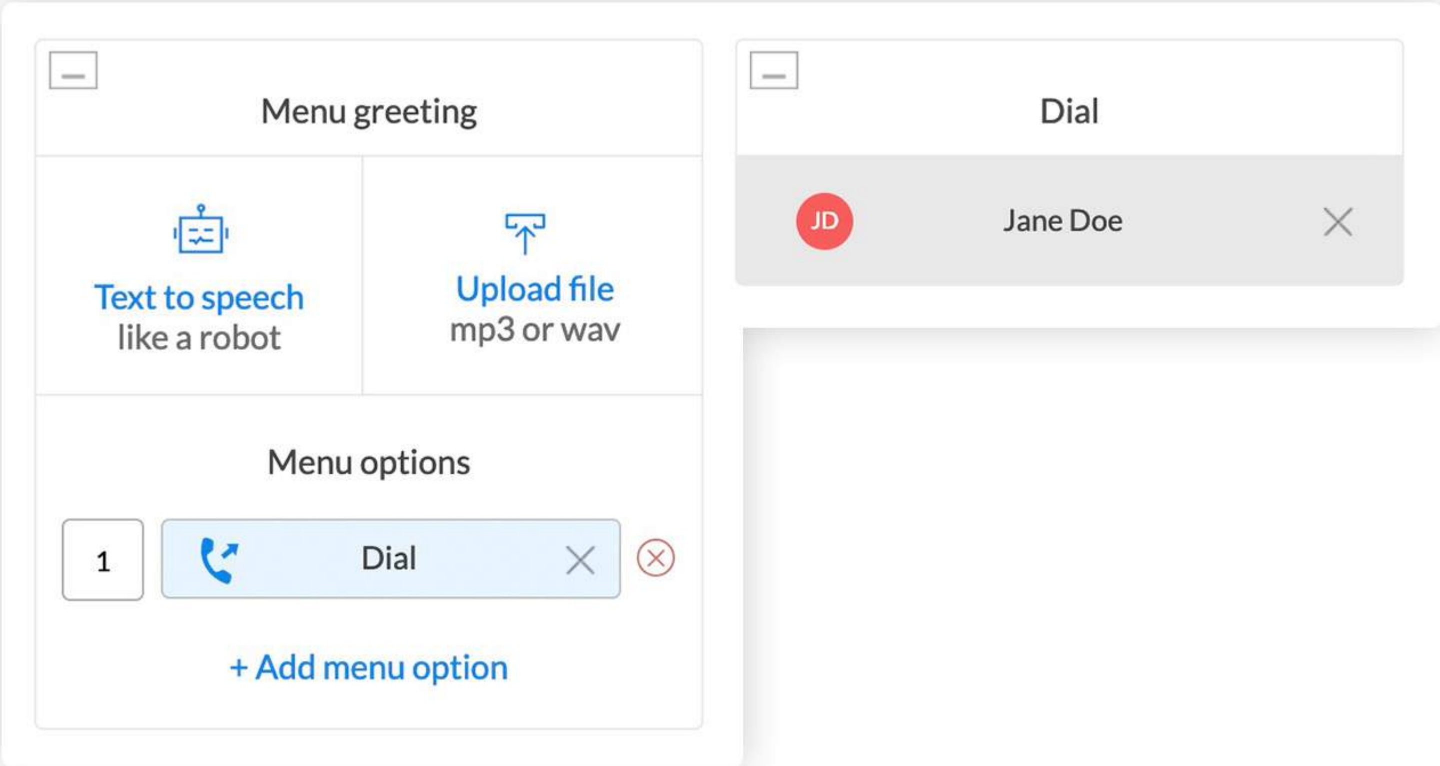
d) If the caller didn’t enter an option: Defines the call flow action when the caller hasn’t selected a valid option.

e) Enable wrong option message: Plays an audio stating that the option selected is not valid.



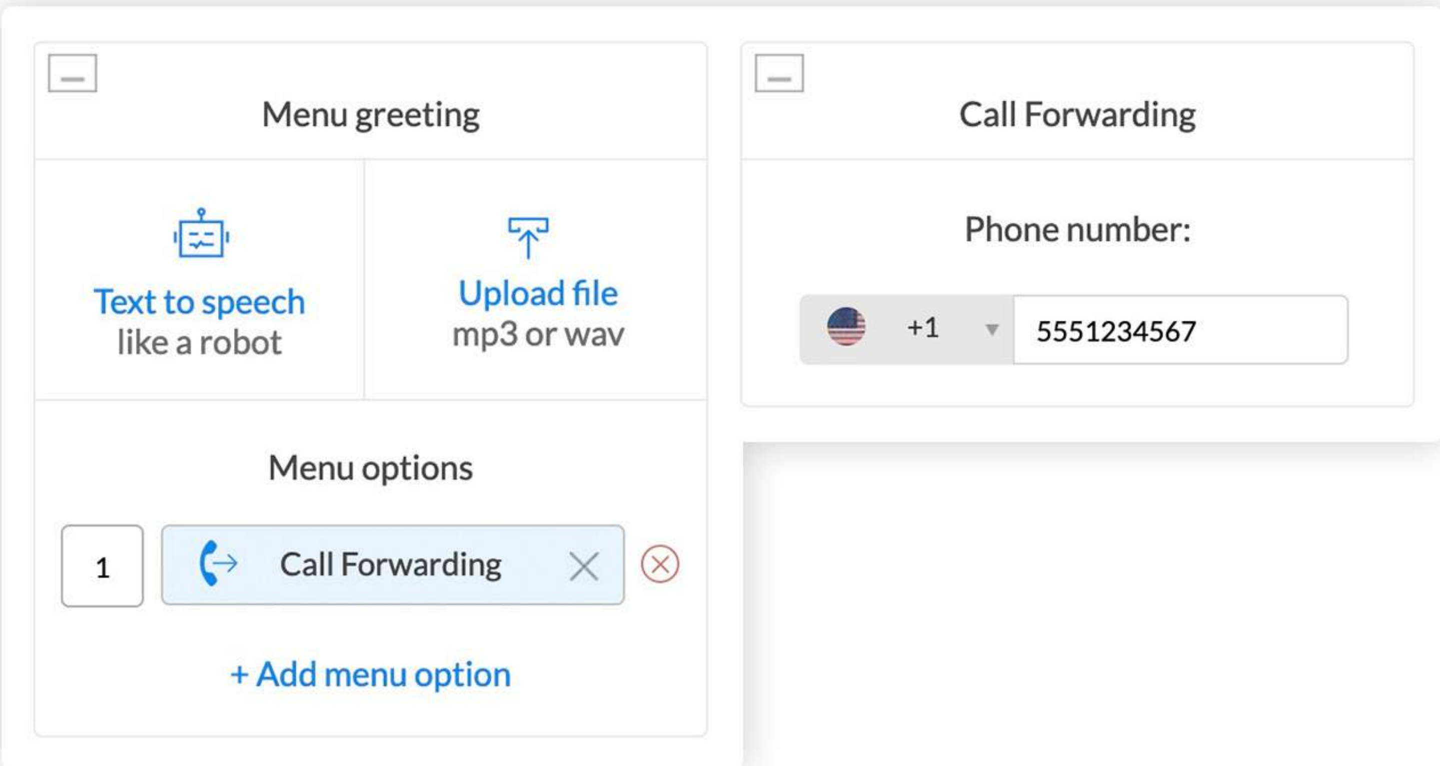
9.4.2 Dial:

Allows callers to be connected to users, ring groups and other call flows.



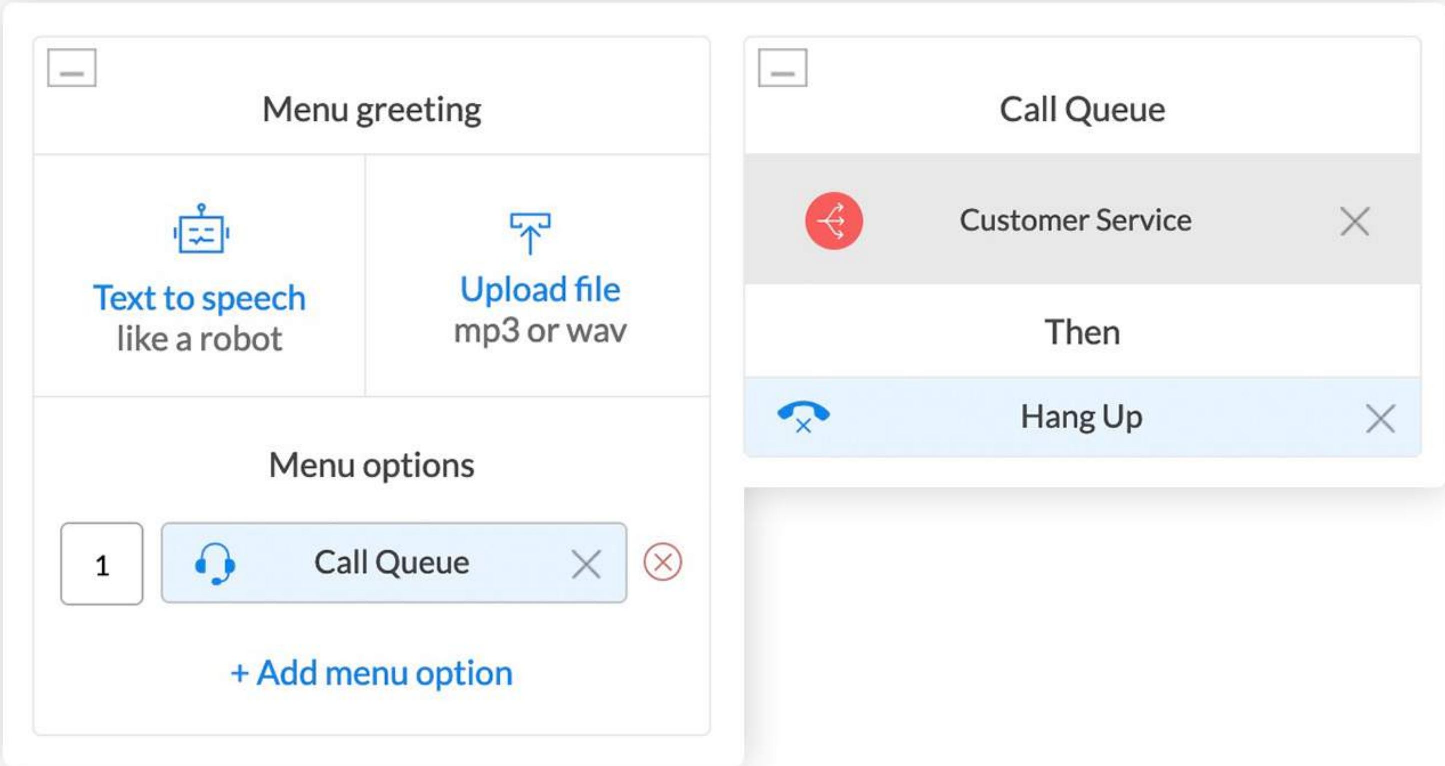
9.4.3 Call Forwarding:

Allows callers to be connected with external Phone Numbers via an outbound call (calls will be treated as regular outbound calls and might have a cost).



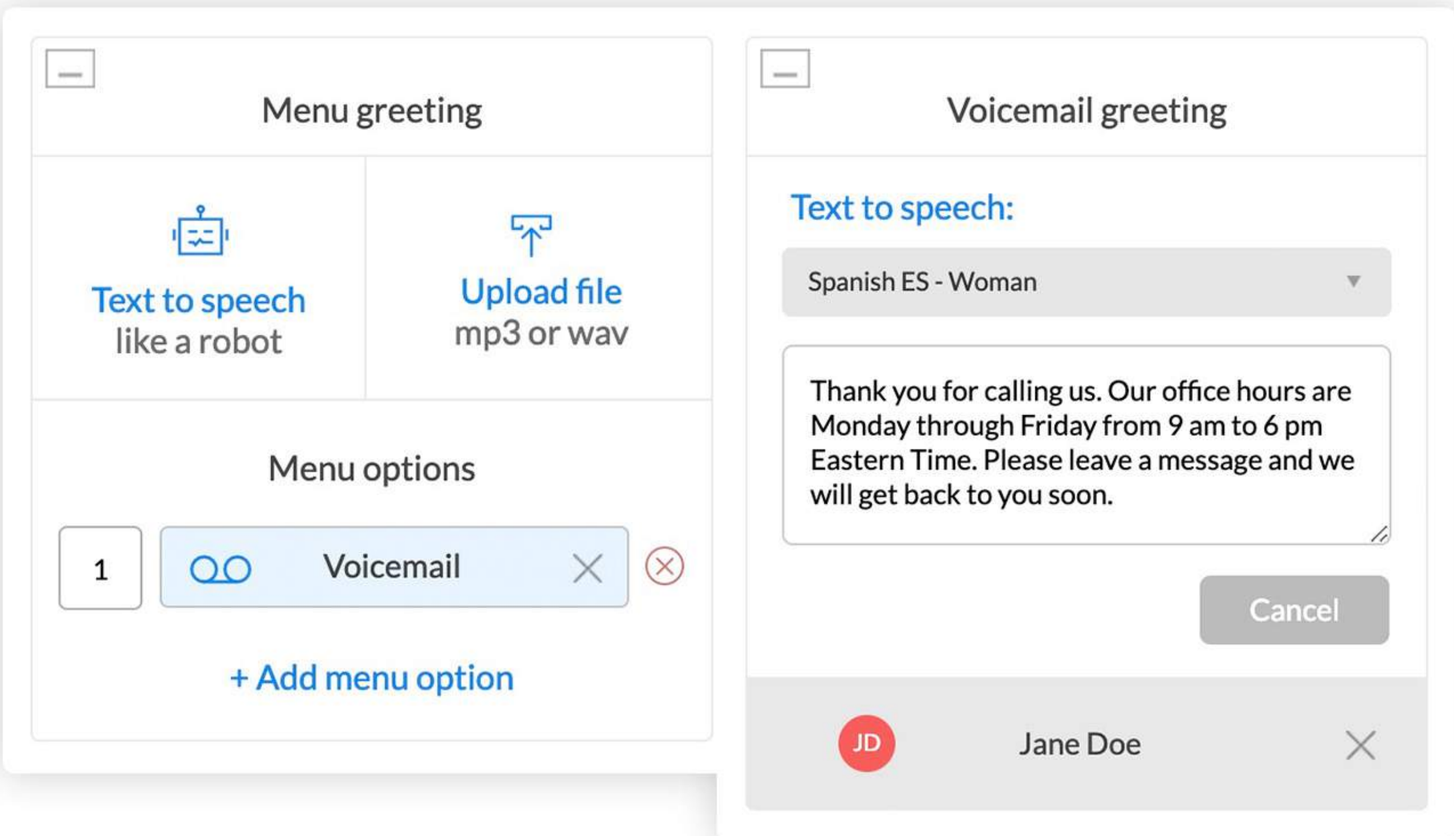
9.4.4 Call Queue:

Allows callers to be connected to call queues. If the call is not answered further call flow actions can be configured, for example a voicemail box.



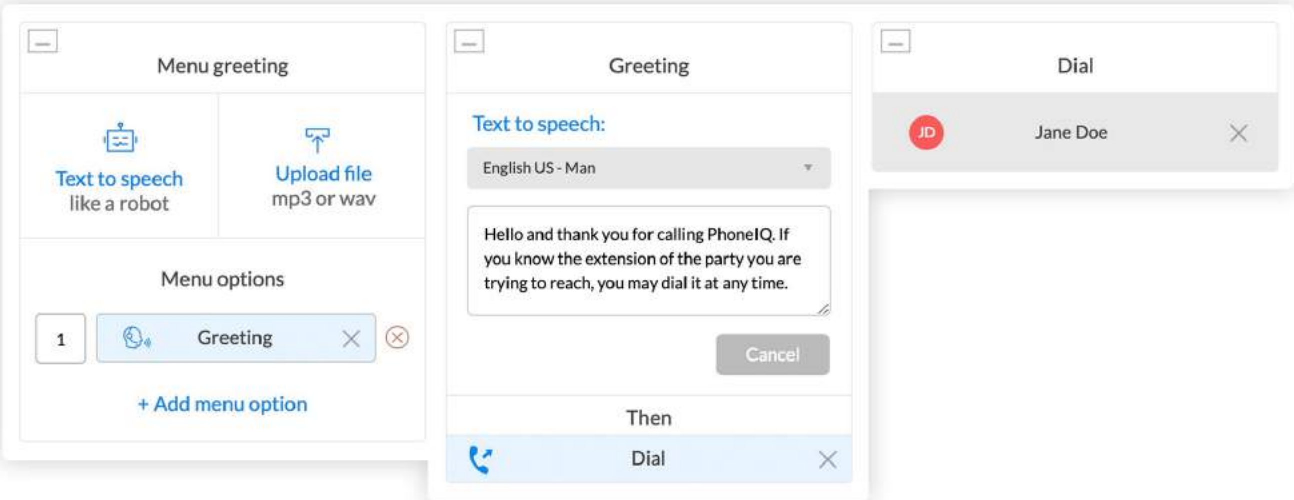
9.4.5 Voicemail:

Allows callers to be connected to a voicemail box so they can leave a message. Agents will receive the message via their apps, desk phone or email. Administrators can setup custom greetings using text to speech or audio files.



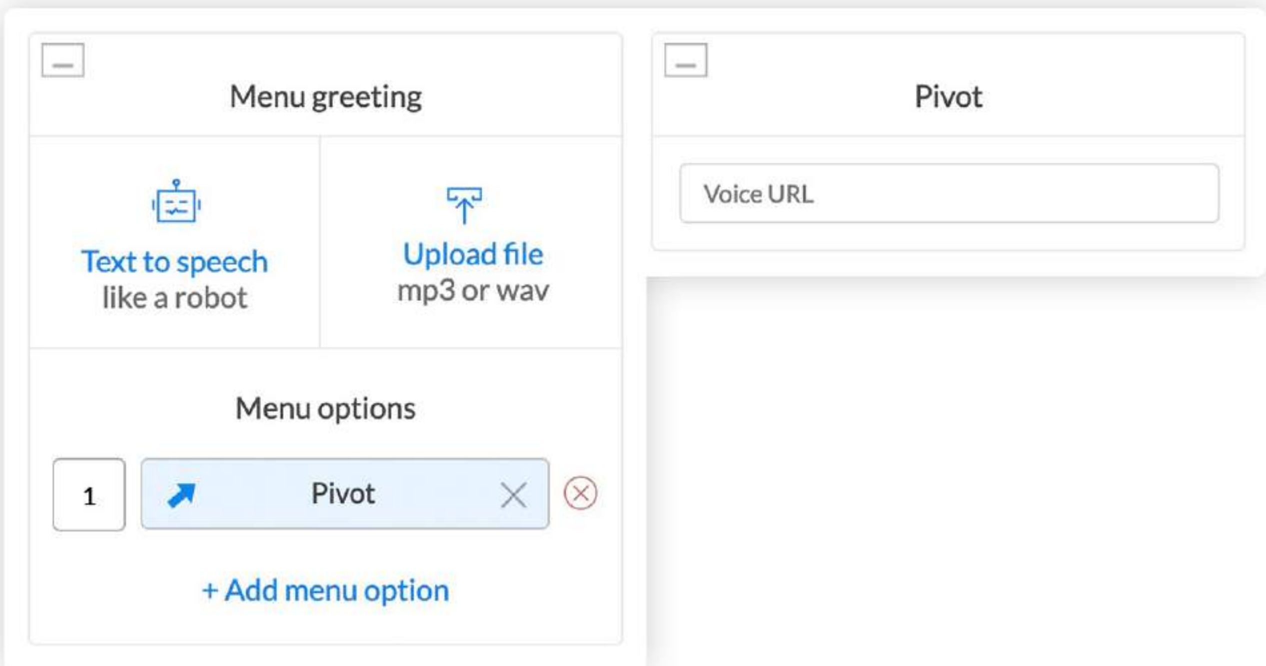
9.4.6 Greeting:

Allows callers to be connected to an audio file. Administrators can choose between pre recorded audio files (limited to 5 MB, MP3 or Wav format) or text to speech audio in multiple languages.



9.4.7 Pivot:

Pivot allows companies to build custom IVR's that connect to external systems in order to route calls based on data like order number, customer number, etc. Pivot systems can be built using XML or JSON and should be hosted in URL's that PhoneIQ can reach.



9.4.8 Hangup:

Ends the call.

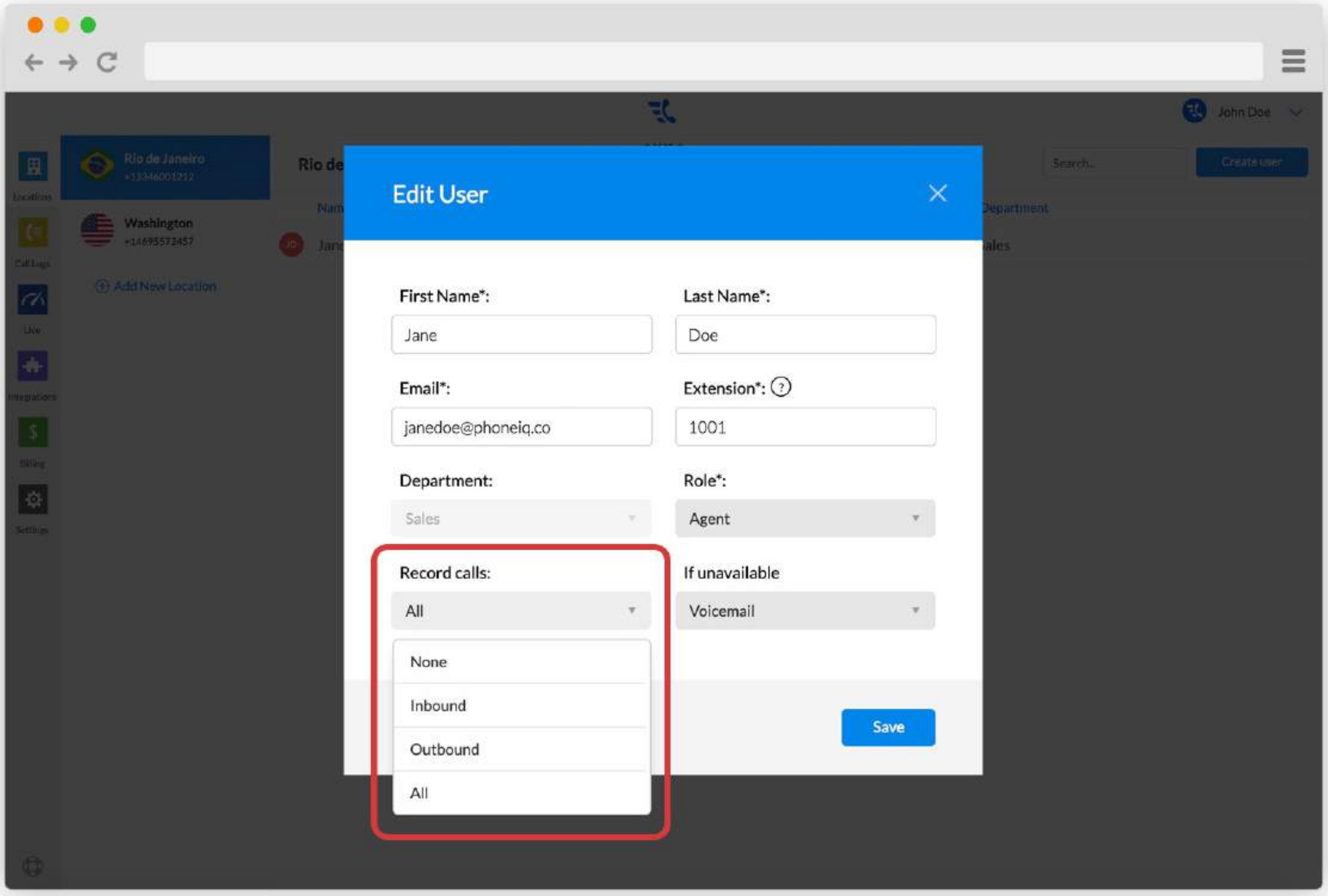
10. Automatic Call Recording

Description:

PhoneIQ offers automatic call recording for both outbound and inbound phone calls. Automatic call recording can be configured at different levels.

10.1 User Level Call Recordings:

Administrators can set automatic call recording at a user level, with options to record all calls, inbound only or outbound only. To enable automatic call recordings navigate to the users view within a location and select a user. In the Edit User form set the call recording option to the desired value.



10.2 Call Flow Call Recordings:

Administrators can set automatic call recording at a call flow level to record inbound calls. To enable automatic call recordings navigate to the call flows view within a location and select a call flow. Click on the Info & Numbers boton and set the call recording option to the desired value.

10.3 Call Queue Recordings:

Administrators can set automatic call recording at a call queue level to record inbound calls. To enable automatic call recordings navigate to the call queues view view within a location and select a queue. Click on the advanced tab and set the call recording option to the desired value.

10.4 Ring Group Recordings:

Administrators can set automatic call recording at a ring group level to record inbound calls. To enable automatic call recordings navigate to the ring groups view view within a location and select a ring group. Set the call recording option to the desired value.

10.5 Call Recording Management:

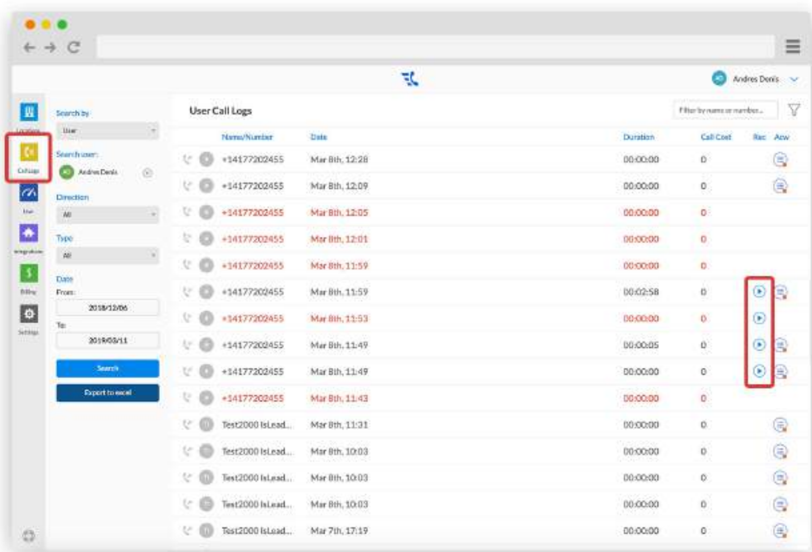
Administrators will be able to listen and manage call recordings from the call logs app in the administrator portal.

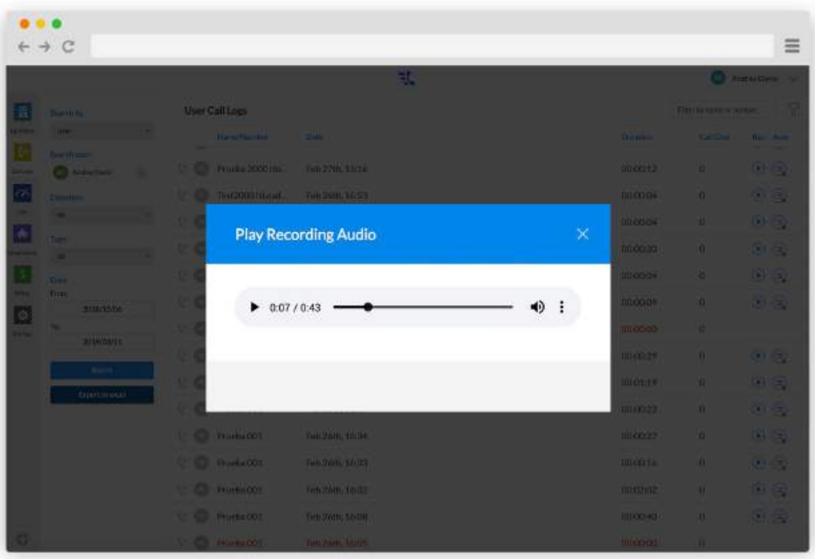
a) Select the desired filters and press search.

b) Once the CDR's (call detail records) are shown, press on the play button to listen to the recording.

c) Call recordings can be downloaded by clicking on the 3 dots menu while listening to a recording,

d) Call recordings can be archived by hovering over a specific CDR and clicking on the right hand side menu. An option to archive will be presented. Archived recordings can be recovered by contacting support@phoneiq.co, if the recording is requested within the storage time frame.

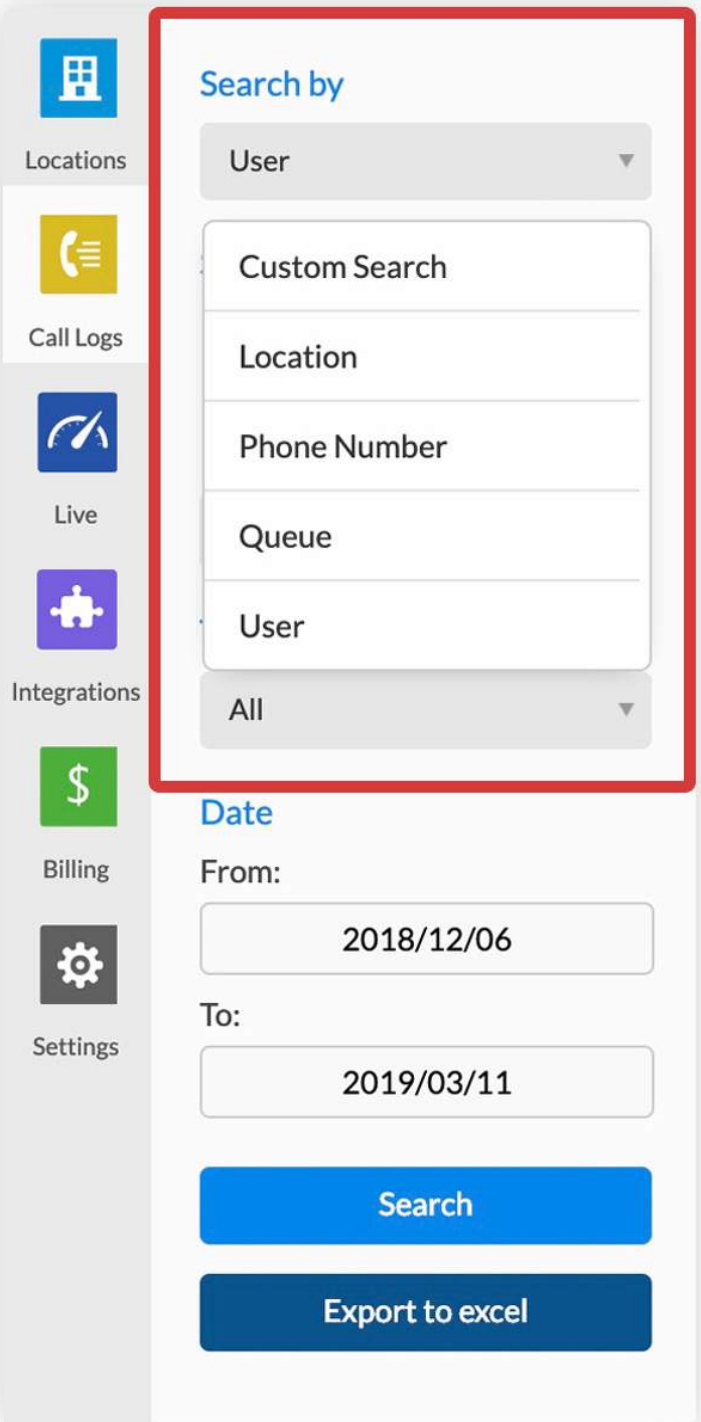




11. Call Logs

Description:

The app Call Logs allows administrators to easily find for phone call related CDR's within the system while providing powerful filters and options to perform advanced searches.



11.1 Search by Location:

Allows administrators to search for phone calls associated to users and phone numbers from a specific location.

11.2 Search by Phone Number:

Allows administrators to search for phone calls that originated or terminated on a specific PhoneIQ phone number.

11.3 Search by User:

Allows administrators to search for phone calls received or made by a specific user.

11.4 Search by Queue:

Allows administrators to search for phone calls associated to a specific call queue.

11.5 Custom Search:

Allows administrators to search for phone calls related to a specific phone number or contact name. A search box is provided were administrators can type in the name or number and perform the search.

11.6 Standard Filters:

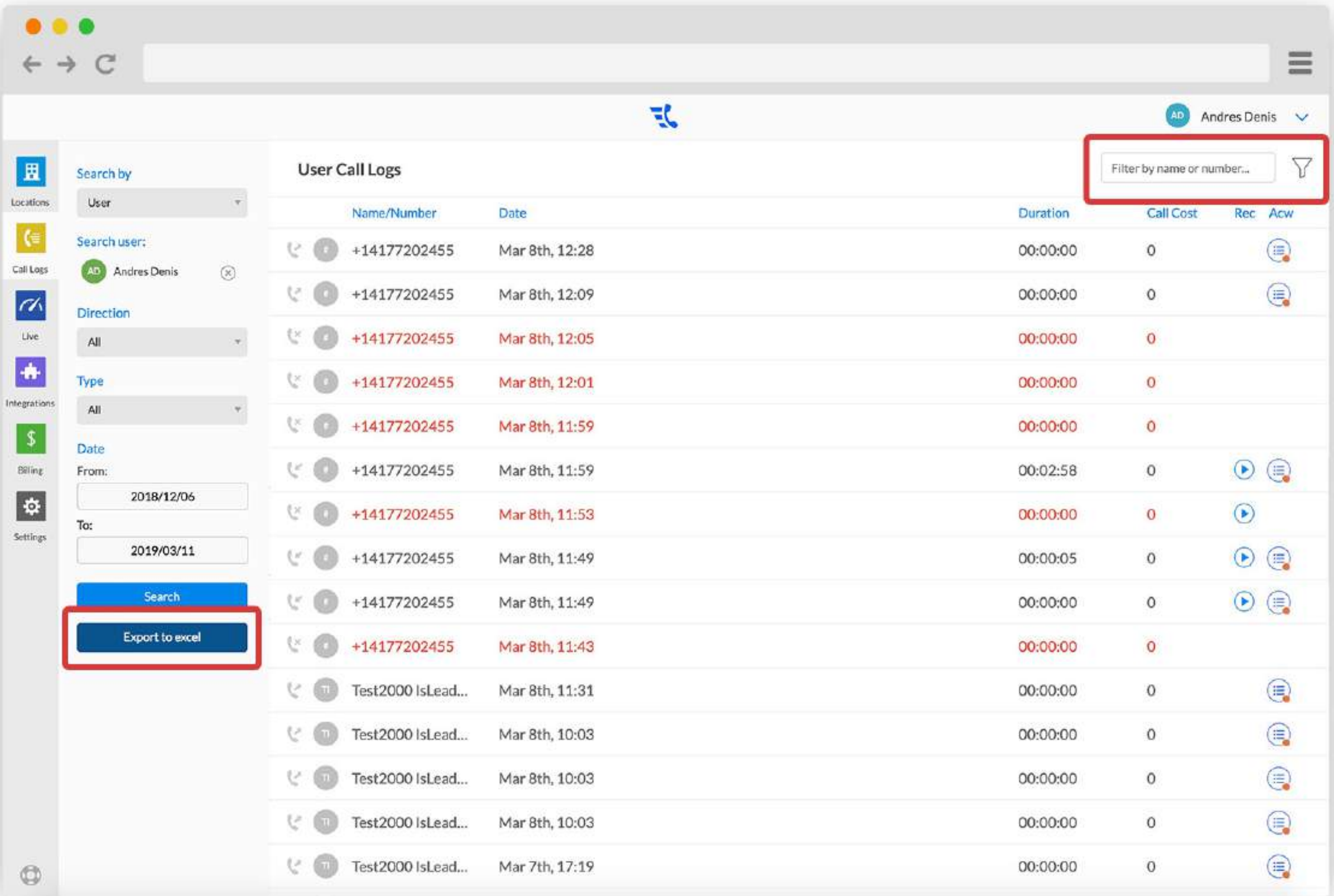
Direction: Specifies the direction of the call (Outbound, Inbound, Missed).

Type: Specifies if the call is internal or external (PSTN).

Date: The range of dates to perform the search.

11.7 Export to Excel:

Allows administrators to download the phone call activity as an excel file.



12. Music on Hold:

Description:

Allows to change the default music callers listen to when they are put on hold. This setting works at an account level and can't be changed for different locations.

12.1 Changing Music on Hold (MOH):

From the “settings” app, select the tab “company settings” and click on the bu-tton “upload file” under the option Music on Hold. Select an MP3 or Wav file no larger than 5MB. Once uploaded click on the button Save Changes.