

# IntellaPhone Setup Instructions

## First: Choose Extension or Create New

- 1) Locate Extensions, and then find the Extension to set as a SoftPhone  
or
- 2) Use the 'New Extension' button

### Locate

Navigation quick search

Navigation

- SMS Message Campaigns
- DID Editor
- Extensions**
- IVR Manager
- IVR Builder
- Trunk Handlers
- Inbound Routes
- Phone Groups
- Devices
- Device Registrations

Extensions Quick-Search Box

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New Extension

2802

Export To PDF Export To Excel Display

Tenant Name	Extension	Device Type	CallerID Name	User	Agent	Status
Default Tenant	2801	SIP	Joe Bobs	2801	yes	

### Create New

Navigation quick search

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- SMS Message Campaigns
- DID Editor
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- IVR Builder
- Trunk Handlers
- Inbound Routes

Extensions Quick-Search

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New Extension

Export To PDF Export To Excel Display

Tenant Name	Extension	Device Type	CallerID Name	User	Agent	Status
Default Tenant	11223344	SIP	Foo		no	
Default Tenant	2601	SIP	Operator One		no	
Default Tenant	2801	SIP	Joe Bobs	2801	yes	
Default Tenant	2802	SIP	Bob Smith		yes	

My Account Help Quick Tenant Filter US/Eastern Next system reload in: 1:46

Navigation quick search

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New Extension

Required Fields

Export To PDF Export To Excel Display

Tenant Name	Extension	Device Type	CallerID Name	User	Agent	Status
Default Tenant	1234	SIP	Bob Smith			
Default Tenant	11223344				no	
Default Tenant	2601				no	
Default Tenant	2801	SIP	Joe Bobs	2801	yes	
Default Tenant	2802	SIP	Bob Smith		yes	
Default Tenant	2803	SIP	D Agent Three		yes	
Default Tenant	2805	SIP	D Agent Two	2805	yes	

Save New Extension Cancel

## Next: Set CallerID Name and Phone Make/Model

- 1) Set CallerID name
- 2) Enable Voicemail (optional)
- 3) Set Email Address (optional, for voicemail)
- 4) Set Phone Make: IntellaPhone
- 5) Set Phone Model: IntellaPhone PC

[1.png](#)

## Second Step: Send the Invitation Email

[2.png](#)

Third Step: Wait for Email to be Sent.  
This may take 30 seconds or more.

Fourth Step: The user will receive an email that looks like the following

[3.png](#)

The above link is purely an example. It is important to use the exact link that was sent in the email in order to proceed to the next step.

# Fifth Step: The user will visit the URL in the email and install the application

Once installed, the user will then copy and paste the Username and Password into the matching fields of the application logon



- 1) Download and install the IntellaPhone Application
- 2) Once installed, copy the Username from this web page into the Username field of the Account Box
- 3) Followed by, copy the Password from this web page into the Password field of the Account Box
- 4) Leave 'Remember Details' checked

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Revision #2

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