ScreenPop User Onboarding

Setting the Extension

If the user is taking over an existing **Extension**, locate that **Extension**, double click on the row and then the row will turn into an editable form.

image.png

Once the editable form is shown, update the details for the **Extension**. If the **Extension** was automatically generated as part of the system setup, the **User** will have already been assigned, but if not make sure the **User** matches the **Extension**.

image.png

Scroll to the right on the main panel in order to see **Voicemail** related options.

The **Voicemail Email** is required for setting up the softphone for screenpops.

Click the **Save** button below the row once the editing is done.

image.png

After the above is saved, the last extensions update is to go to the **Additional Extensions Settings** on the right hand side of the page.

Scroll down the settings to find the **Phone Make** and **Phone Model**.

Set the **Phone Make** to IntellaPhone and IntellaPhone PC should automatically get set. Then save.

image.png

Once saved, click on the **Invite Softphone User** button. The user can then follow the directions to get their softphone setup → IntellaPhone image.png

Jump to the below section: **Setting The Agent**.

Creating a New Softphone Extension If Necessary

If the user already has a deskphone and needs a softphone, start by selecting their existing **Extension** in the grid.

Then click the button **Create SoftPhone User**

image.png

An automatic prefix of 2 is added to the softphone extension.

Everything should auto populate and then click **Save**

image.png

After the system creates the softphone, a success message appears.

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To refresh the grid, click the double arrow **Refresh** button, then the new softphone will appear in the extensions list

image.png

Then follow the same instructions as the top as if it's an existing extension.

Make sure the new softphone extension is selected, edit the row if necessary.

Double check the **Additional Extension Settings**, **Phone Make & Model** that they are set to IntellaPhone.

Once everything is updated and saved, proceed with the same **Invite Softphone User**.

The user can then follow the directions to get their softphone setup → IntellaPhone

Setting the Agent

Navigate to the **Agent Editor** screen.

image.png

The **Quick Search** can be used to check if the **Agent** has already been added to the system.

image.png

If not found, click **New Agent** button and a form will be shown. Populate all of the highlighted fields below and then save the new **Agent**. Keep in mind as a best practice to ensure that agents have a unique **Agent Pin** number for their logins.

image.png

Next, using the left navigation sidebar, navigate to **Agent Allocations**

image.png

If you have no **Agent Allocations**, click the **New Agent Allocation** button and a form will be shown.

image.png

Populate the highlighted fields and then save the new **Agent Allocation**. **ScreenPops** checkbox is required for the agent to receive screen pops.

image.png

Now that the **Agent** is in the system, using the left navigation sidebar, navigate to **Agent Assignments**

image.png

First, use the **Select Queue** list selector on the top.

The **Quick Search** on the right can be useful to locate the new **Agent**, and then use the green left arrow to add the chosen agent to the **Queue**.

image.png

Lastly, test the new login by going to the **Toolbar URL** specifically for your system and then logging in with this **Extension/Agent Number/Agent Pin**

image.png

Setting a Manager

If there is a need for a **User** to be able to look at **Call History** and **Call Recordings**, then they will need to have a **Portal Account** (which is different than the **Agent Login** that's covered above).

Using the left side navigation sidebar, navigate to **Users**

image.png

Then on the center panel, use the **New User** button to create a new **User**.

Use the **Quick Search** to determine if there already is a **User** for this person.

image.png

In order for a **User** to have access to all **Calls**, they will need the following set:

Department: admin

Permission Mode: Exclude

Permissions: **Call Logs**, **Call Recordings**, **Call Recordings Other**

Make sure that **User** and **Password** are both set in the row editor form, as well as **Department**, otherwise the **User** cannot yet be saved

image.png

Scrolling over to the right will be required in order to set the necessary permissions.

image.png

There are many possible combinations of access available, including access that restricts users to certain calls. The above is the simplest way to give a user access to all calls in the system.

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