



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.

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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**.

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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.

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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.

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Once saved, click on the **Invite Softphone User** button. The user can then follow the directions to get their softphone setup → [IntellaPhone](#)


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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**


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

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

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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

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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.

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

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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.

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

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

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

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

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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**.

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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**

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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**

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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.

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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

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

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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.