

# Quick Start Guide

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## **Admin settings**

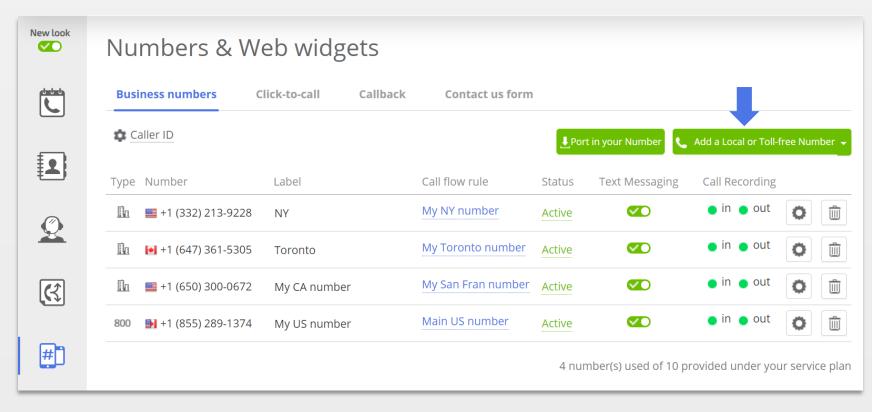


#### Adding business numbers

You can add new business lines in the Numbers & Web Widgets tab.

There, click on the "Add a Toll-free or Local Number" button.

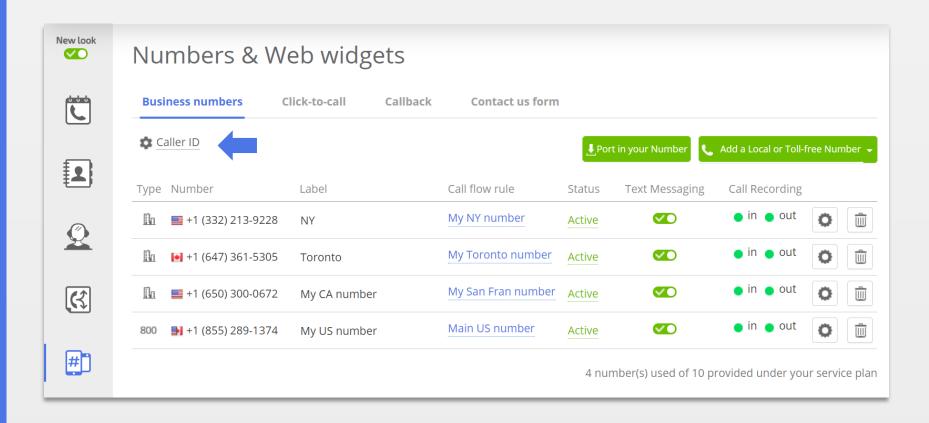
The Basic plan provides 2 business numbers, the Standard plan provides 5 business numbers, and the Ultimate plan provides 10 business numbers.





#### **Enabling Caller ID**

To get **inbound calls** to display your business number on the Caller ID, click the "Caller ID" option.

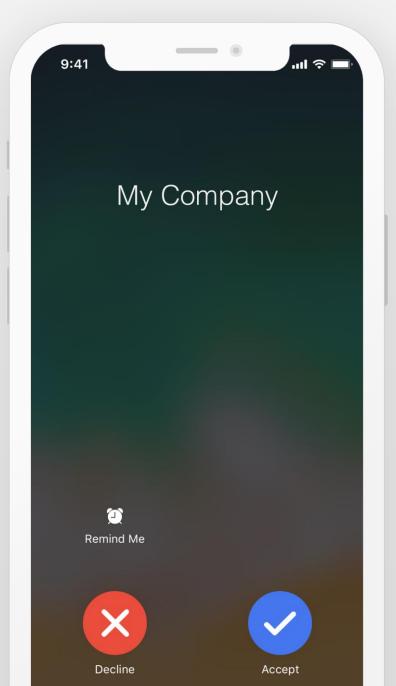




#### **Requesting CNAME**

To have your company's name show up on someone else's phone when you call them, there are mechanisms outside of MightyCall's control (no VoIP provider is able to control this alone).

However, **Outbound Caller ID** is available for most local numbers and is free with MightyCall, so if you're interested in branding your business number, just take a minute to <u>fill out this form</u> and wait for us to run it through the national CNAME database.



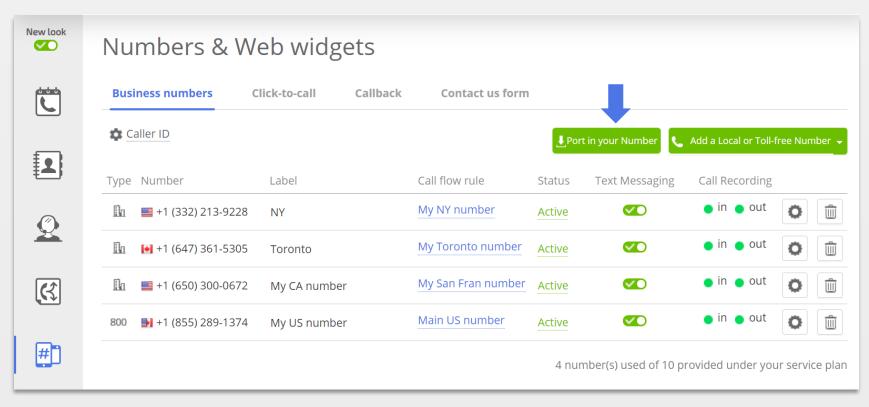


#### Porting business numbers in

You can port in your number (physical and virtual) completely free of charge.

You just need to submit your porting request <u>here</u> or go to the "Numbers and Web widgets" section and click "Port in your Number"

Porting orders usually take around a week to complete. While the numbers are being ported, they are still available on your previous carrier's end, so there's no downtime in using it.



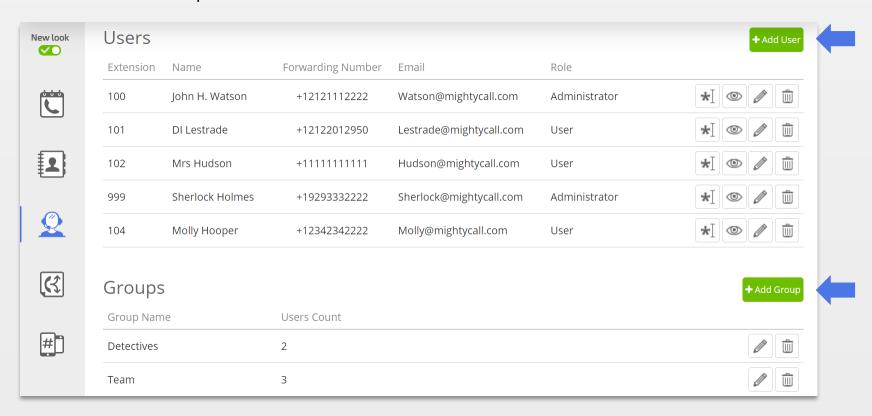


#### Adding your team

To invite colleagues, go to the section labeled "Team", and click the button labeled "Add User".

First, put in the information for the colleague you'd like to invite as either an administrator or a user.

You may add several colleagues and include them in groups. This can be accomplished by clicking "Team," and then "Add Group".





#### Setting up call flows

Click the Call Flow icon in the left menu

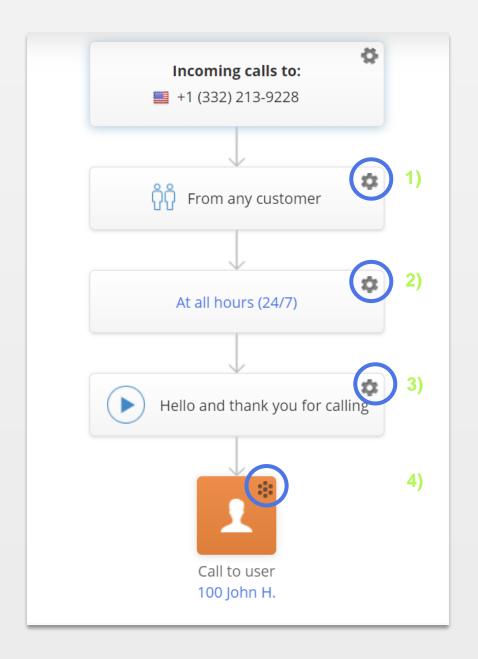


From there, click on "Incoming calls to..." and check the numbers this call flow should be applied to.

The default call flow will take the callers through a voice greeting and forward the call to the main user afterwards.

However, there are other call handling options:

- 1) handle calls from different numbers differently– like regular calls, VIP calls, or block list calls.
- 2) have business hours
- 3) change voice greetings (see page X)
- 4) change call handling options (see page X)

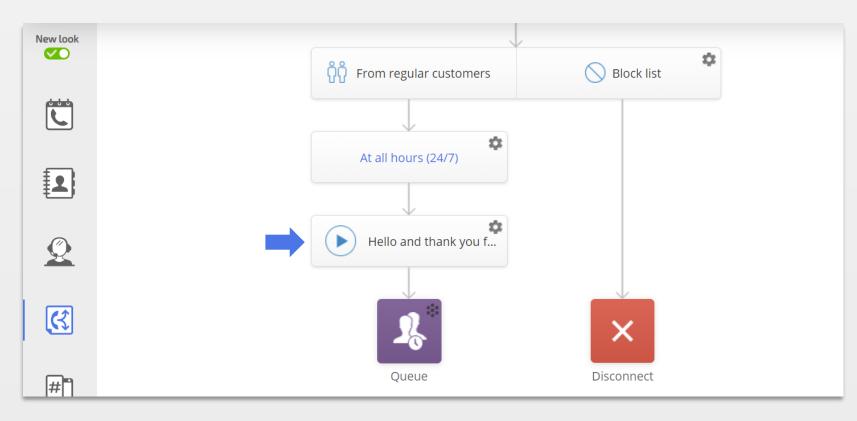




#### Company voice greetings

You can change the voice greetings customers hear when they call your company. You can do this by clicking on any greeting box within the call flow.

You can upload an audio file or record a greeting straight from your phone.



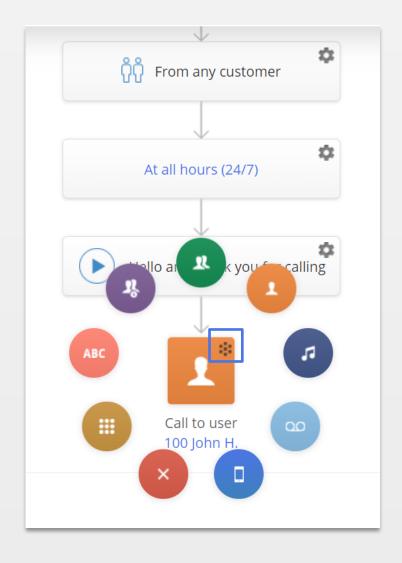


#### **Call handling options**

At the bottom of the call flow chart, there is a user set to receive the calls. By default, that's the main user.

To change this setting, click the small "action menu" icon within the colored button. There are 9 different call-handling options.

- *Call to user* calls are forwarded to one specified person.
- Call to group calls are forwarded to an entire group; for example Sales.
- Call Queue calls are sent to a queue and will remain there until an employee answers the call or the caller hangs up.
- Call any phone number calls are routed to an external line.
- *Voicemail* calls are sent directly to your voicemail. This option is particularly useful during off-hours.
- *IVR* (*Voice menu*) callers are offered several options (for sales press 1, and so on).
- *Dial by name* callers can dial in letters of an employee's name instead of a number using the number pad. (e.g. John) Once the system recognizes the name, the call is forwarded to the appropriate user.
- Disconnect calls are disconnected.



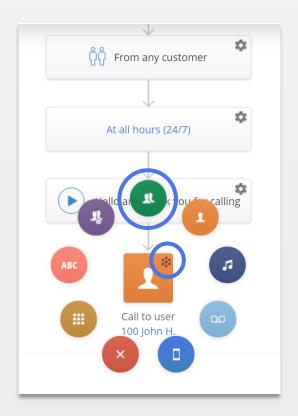


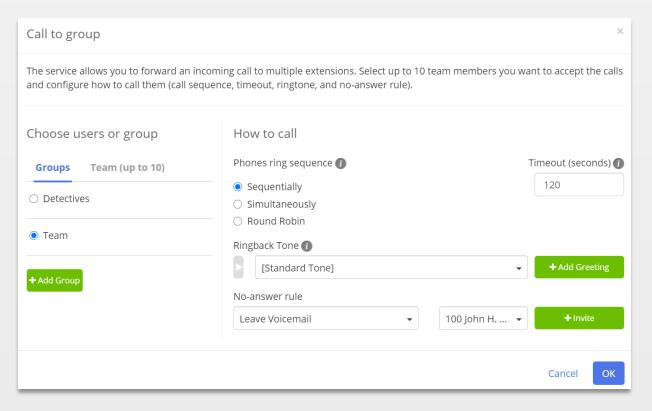
#### Call to group settings

Call to Group comes in handy when you can organize staff into departments (e.g. Sales and Support).

This makes it easy for callers to access the right person without being transferred along the chain of operators.

For each group you create, you can customize the voice greeting and change the no-answer rule.



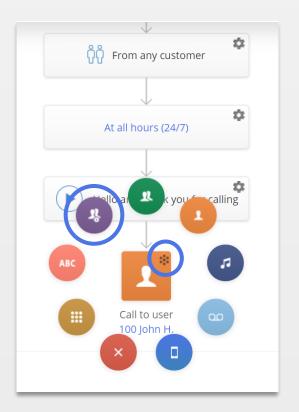


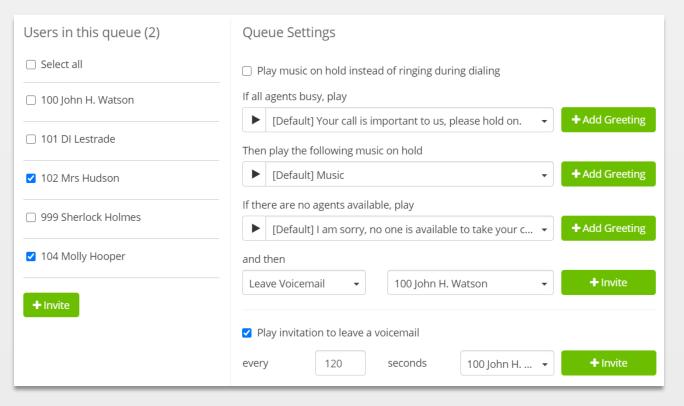


#### Call queue settings

This option allows you to keep the customers in the queue up until an employee is able to pick up the call or the caller decides to hang up. This feature is useful when a user has too many incoming calls for one operator to handle, but doesn't want them to go to voicemail immediately.

In the "users in this queue" section, you can select specific team members who will receive incoming calls. You can customize greetings, add music on hold, and specify when to direct the caller to voicemail from this section.







#### **Using the Journal**

The Journal is where You can keep track of all your call history, texts and voicemails.

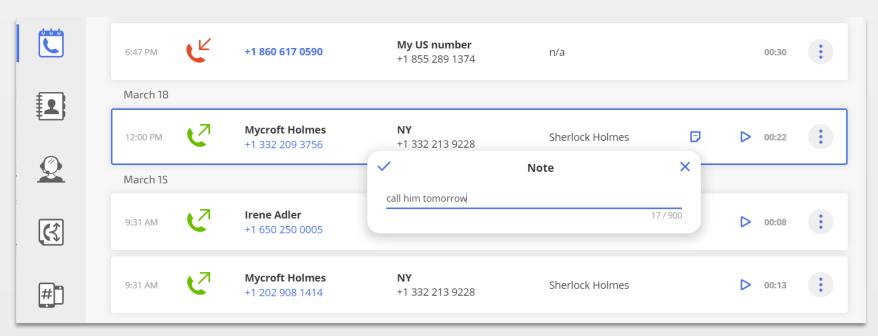
Customer requests can be filtered by type or by the team member who handled it.

You can also listen to recorded calls and read voicemail transcripts here (transcripts can also be sent via email).

You can place calls directly from the Journal page as well.

When you leave comments on a call, all your colleagues will see the notes to guarantee everyone is on the same page.

When a colleague finishes a task, they can mark it as resolved to better keep track of what needs to be done and who has done what.





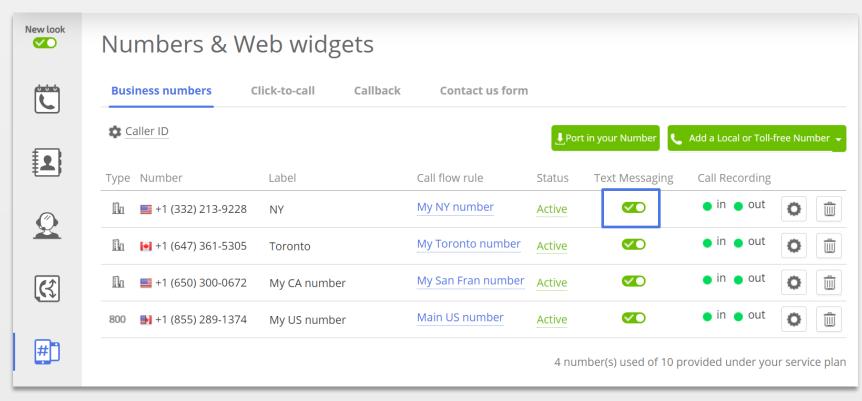
#### **Enabling text messages**

To enable texts go to the "Numbers and Web widgets" section and click "Enable."

Text messaging is available on desktop & the mobile app.

A single message can contain up to 140 characters. Messages longer than that will automatically be split into parts, but please note that a single message cannot be longer than 3 parts in total.

Text messaging does not support international numbers, short code, or multimedia messaging service (MMS).

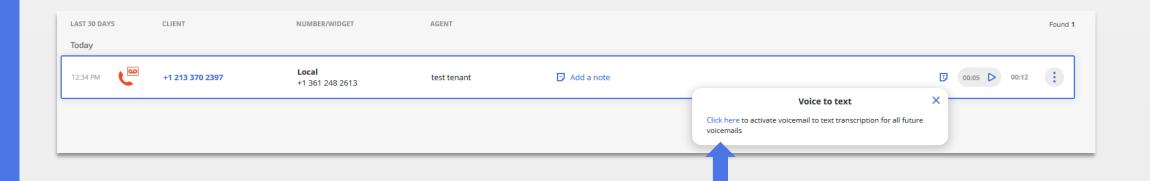




#### **Enabling voice-to-text**

In order to read voicemail transcriptions, you will first need to enable this feature.

This can easily be done in the Journal – just find any voicemail and click the little "note" icon, which will prompt the system to activate transcriptions.





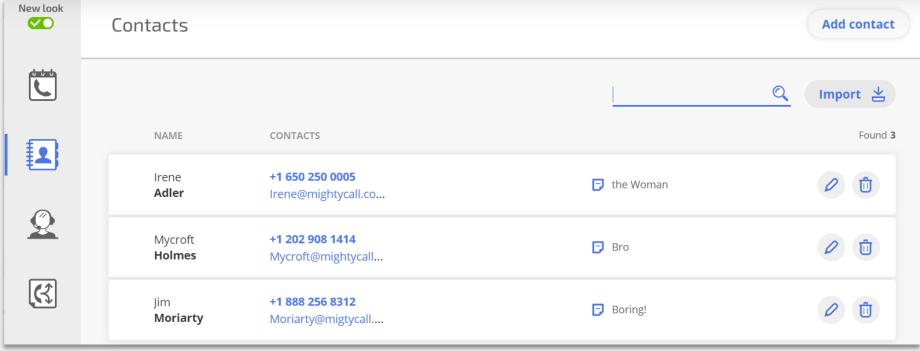
#### **Using the Contact Book**

The Contact Book allows you to save information about customers and see your history of communication with them.

For each client, you can add a name, email, up to 20 phone numbers, and a comment visible to all your staff in the account. The Contact Book is shared between everyone on the account.

You can upload a file in CSV or vCard format into the Contact Book. To import a contact, click the 'Import' button in the top right corner of the Contacts tab.

You can also add new contacts straight from the Journal or create them manually; for that - go to the Contact Book section and Click the 'Add Contact' button.





#### **Using the Webphone**

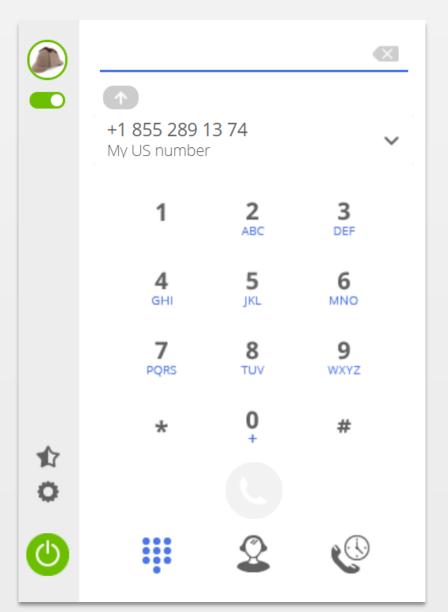
The Webphone allows you to make and receive calls from your business number using a web browser.

The Webphone is available on the Journal page and opens in a separate window.



The Webphone is turned off by default, so you will need to click the "Power" button to activate it.

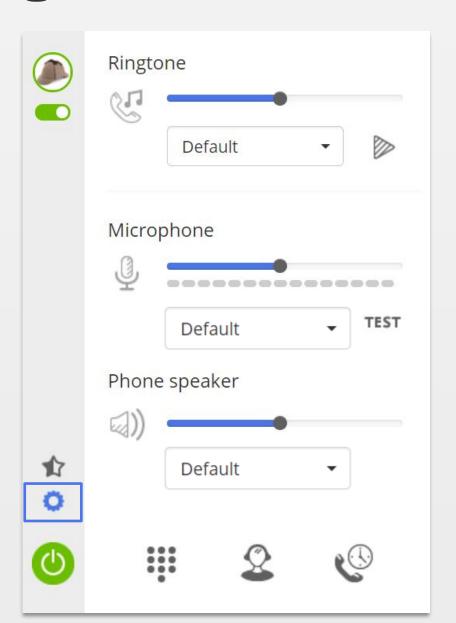
MightyCall will ask for permission to use the microphone, which you must allow to make calls via the Webphone.





#### Webphone troubleshooting

- Make sure you have a proper internet connection.
- Make sure you have allowed microphone access in the browser.
- Check your audio devices. You need a microphone and speaker (or a headset) to use the Webphone.
- Test the microphone. Make sure it works properly.
- Make sure the UDP/1935 port is available to use the Webphone.



## Personal settings



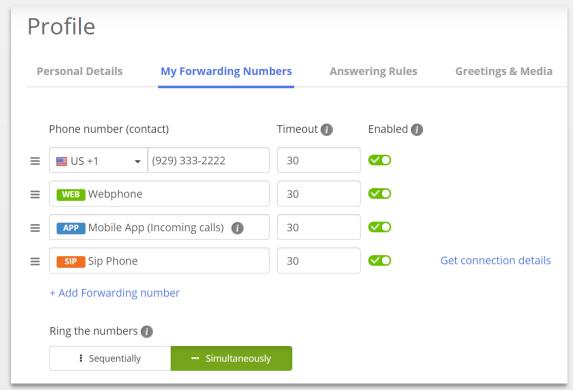
#### Setting up call forwarding

Go to Profile (top right corner) Sherlock Holmes -> My forwarding number

Call forwarding is a personal setting. The following forwarding options are available:

-your cellphone, -the webphone, -the mobile app, -an external IP desk phone or softphone.

After selecting the forwarding options, choose a dialing sequence (at the same time or one-by-one) at the bottom of the page.



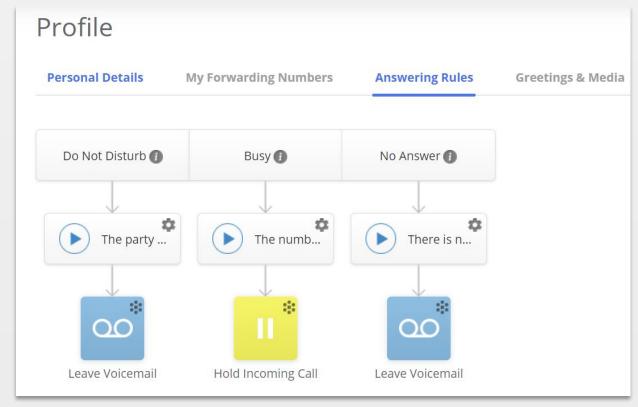


#### Setting up personal answering rules

Go to Profile (top right corner) Sherlock Holmes -> Answering rules

Here, you can specify how to handle calls when your status is set to: "do not disturb", "busy" with another call or when there's "no answer".

Note that "answering rules" settings apply to each user individually.

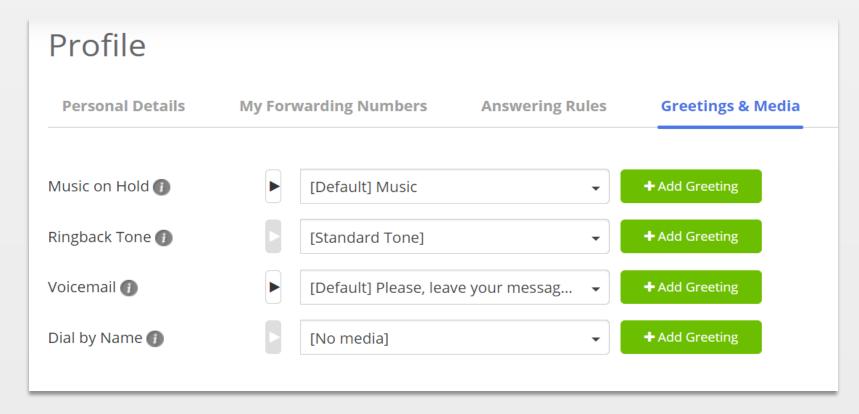




#### Setting up personal greetings

Go to Profile (top right corner) Sherlock Holmes -> Greetings & Media tab.

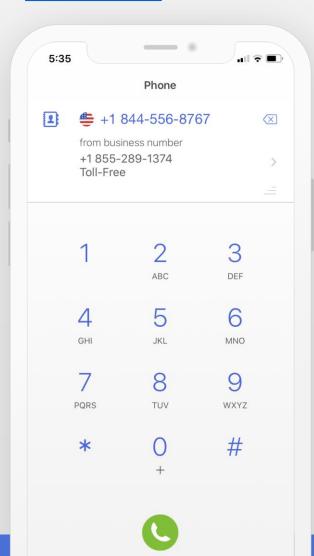
Here users can change music on hold, voicemail greetings, ringback tones and the dial by name greeting. Unlike the greetings in your "call flows", these are personal settings and apply only to the specific user.



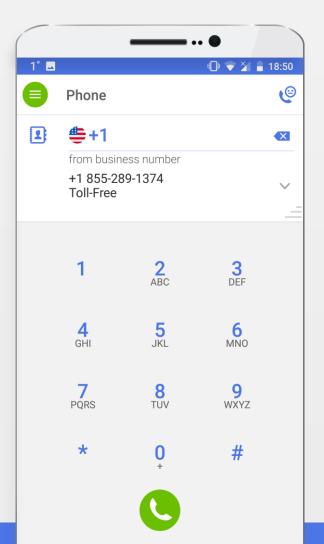
# **Mobile App**

#### Where to download MightyCall's mobile app

iOS - download



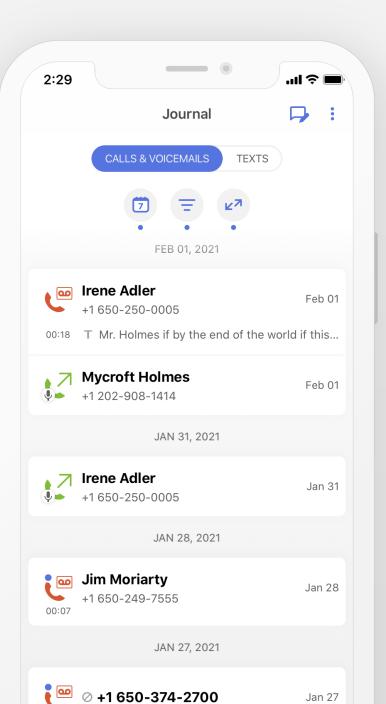
Android - download





# What you can do with MightyCall's Mobile App

- Make and receive calls
- Read texts and reply to them
- Manage your status
- Add and edit contacts
- Leave comments on contacts and view communication history
- Listen to & read your voicemails
- Listen to call recordings
- Block unwanted callers





# Changing the mobile app calling methods

You can select one of 3 methods to make outgoing calls:

#### • IP Telephony

The default, preferred method,

It requires a good internet connection.

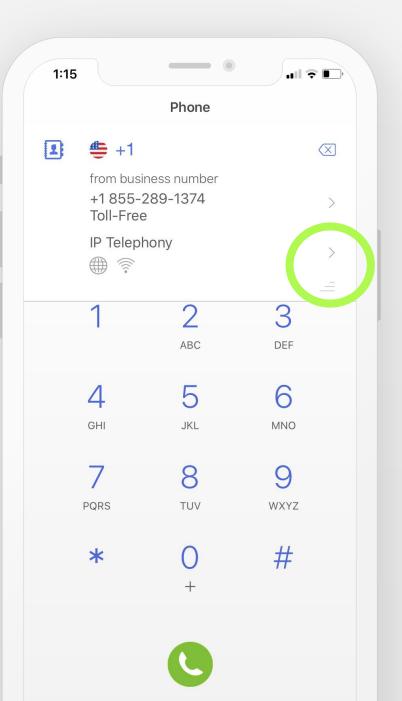
The customer will see your business number as the Caller ID during the outgoing call.

#### Mixed method

The customer will also see your business number as the Caller ID during the outgoing call. This method can be used if your internet connection is poor.

#### Via the cell phone

The customer will see your cell phone number. This method can be used if you do not have an internet connection but must make a call. Be warned, this method uses data from your mobile service provider plan.





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