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Setting Up Talkdesk: A QUICK START GUIDE FOR ADMINS

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Introduction

Welcome to Talkdesk! We are thrilled to have you as the newest member of our growing family.

With Talkdesk, you can create your entire call center in minutes - and this guide will show you how. It will walk you through the setup process and link to more detailed documentation articles so you can dive a bit deeper when needed.

We really hope Talkdesk makes your job easier and that you love it as much as we do!

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Before You Use Talkdesk

Before you use Talkdesk, it is important that you optimize your work environment, system and network.

Browser - Please use the latest version of Google Chrome and make sure that your team is not using the following browser extensions: AdBlock Plus, AdBlock, HTTPS Everywhere, ScriptSafe, Flashblock, Disconnect, DoNotTrackMe and Ghostery. Please don't run any network-intensive applications on your computer (internet radio or streaming video), don't run significant uploads or downloads and close unused desktop apps that take up a lot of CPU%.

Flash - Make sure you have the latest version of Adobe Flash Player.

Headphones - We recommend wired headsets with a 3.5mm jack (single jack only) rather than a USB connect and headsets that have a built-in microphone. For optimum performance, we recommend the Jabra Evolve headset. If this is above your price range, you can try the Plantronics option.

Internet - We strongly recommend using LAN (hardwire) over WiFi if possible, that you optimize your internal network and meet all of our additional system requirements.

Microphone - You must provide Talkdesk with access to your computer's microphone. Once you sign up for Talkdesk, be sure to click "Allow" next to the prompt that says "https://yourcom-

Create Your Talkdesk Account

Once your team has met all of the above requirements, it is time to create your Talkdesk account. Go to https://www.mytalkdesk.com/users/sign_up and enter your account information and credit card information. You should also enable auto-recharge in the Admin -> Billing tab to help prevent downtime. Your credit card will not be charged until your free trial ends and you can cancel your account at anytime in the Admin tab.

After your account is activated you will be inside your new Talkdesk account. Make sure to bookmark the URL (for example, "https://yourcompany.mytalkdesk.com") because it is your login URL.
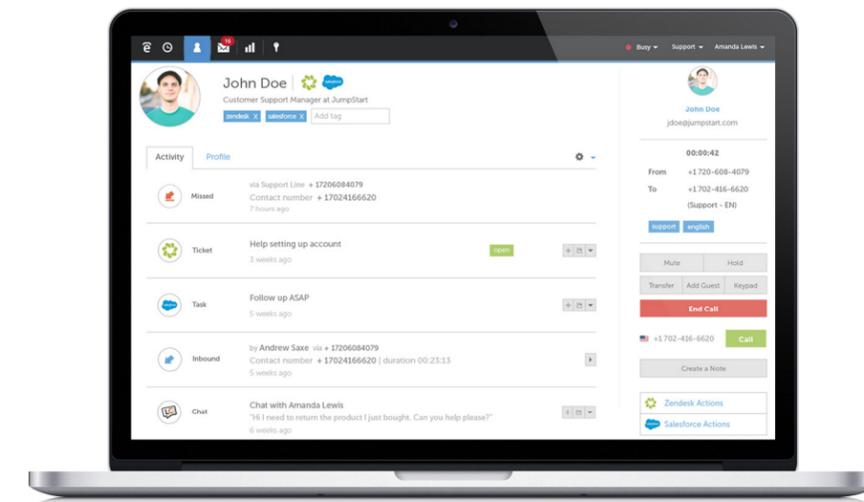
Basic Talkdesk Setup

Buy a Phone Number

Now that you have your new Talkdesk account, it is time to set it up. The first step is to purchase a phone number (skip to "Using Your Current Phone Number with Talkdesk" if you would like to port an existing number).

To do this, click "Admin" -> "Numbers" -> "New Phone Number" and enter the number's country (please contact support@talkdesk.com for phone numbers from additional countries), select the phone number type (local number or toll-free), enter the specific area code or prefix, click "Search Numbers" -> "Buy".

When you purchase a new phone number, the cost is deducted from your account credit. As a first-time user, we provide you with $5 in free credits.

Using Your Current Phone Number with Talkdesk

To port your existing phone number to Talkdesk send an email to support@talkdesk.com. This process takes at least two weeks. Please note that numbers outside the US and Canada cannot be ported to Talkdesk at this time. To learn more about how to use phone numbers from other countries with Talkdesk click here.

Invite Your Team to Talkdesk

Once you've purchased your phone number, it's time for you to invite your team to Talkdesk. To add team members - or as we like to call them "Agents" - to Talkdesk, click "Admin" -> "Agents" -> "Add New Agent".

Then, fill out their basic information (name, email and extension), external phone number (the number calls are forwarded to on their external phone), role (permissions), ring group (skills, departments, languages, etc.), agent type (flexible or full-time) and then click "Save" to create the new agent.

Connect Talkdesk with Your Business Tools

Talkdesk currently integrates with many different CRM systems, Helpdesk, Chat, eCommerce and Marketing Automations platforms. If you use Salesforce, Zendesk, Desk.com, LiveChat, Shopify, Infusionsoft or one of the 30 other systems we integrate with, we recommend that you connect them with Talkdesk. This will automatically exchange information between both systems, automate workflows and show a complete view of the customer to your agents when they call.
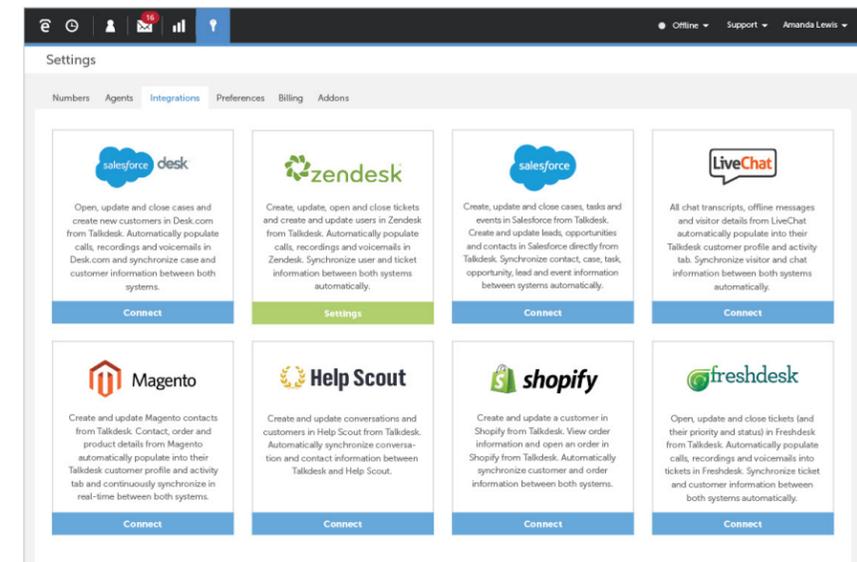

To configure an integration, click "Admin" -> "Integrations" -> "Connect". Then fill in your API key and authentication token found in your CRM's settings section, click "Save" and your integration is complete! To learn more about how to configure and use a particular integration, please download one of our integrations guides.

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Setup Automated Workflows

With Talkdesk it is possible to setup automated work-flows that send information from Talkdesk to your integrated business tools and emails to your team when certain events happen. For example:

• When a call is missed, email the support team
• When there is a new voicemail, create a ticket in the helpdesk with the call data and voicemail recording
• When an inbound or outbound call ends, log the call information in your CRM

To configure Automated Workflows, click "Admin" -> "Integrations" -> "Settings" below the business tool -> "Create New Automated Task". For step-by-step instructions on creating an Automated Workflow click here, for a list of the most common Automated Workflows click here and to watch our recorded webinars on Talkdesk integrations and automated workflows click here.
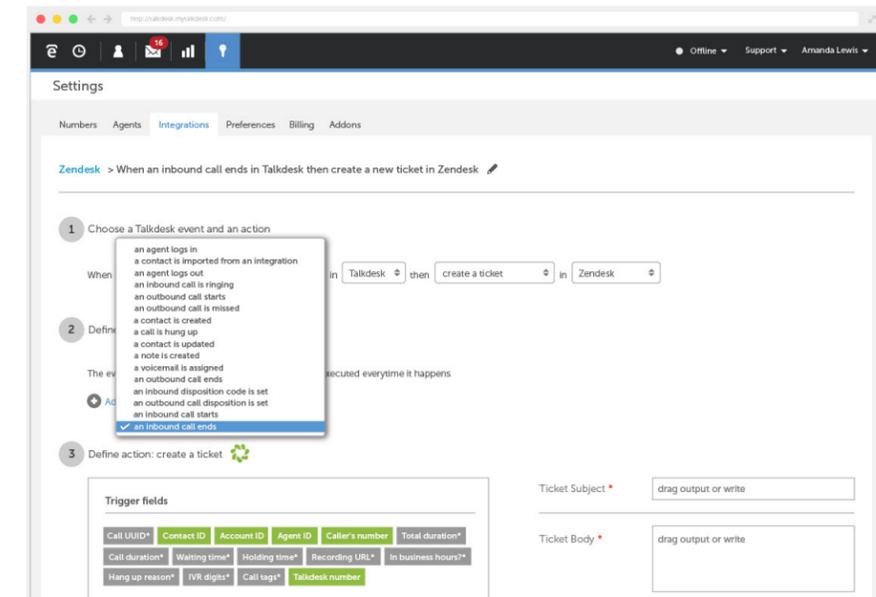
Advanced Talkdesk Setup

Now that you have completed the basic Talkdesk setup, it is time to optimize your Talkdesk configuration.

Phone Number Setup

With Talkdesk you can configure unique settings for each phone number. Below are the features and functionality that are customizable as well as information about how to optimize each:

- General Settings - Configure ring groups to ring more than one agent at the same time when a caller dials a phone number.
- Greetings - Configure unique greetings and messages for each phone number to provide a personalized experience to callers.
- Extensions - Configure unique extensions for each phone number to route callers to the correct agent.
- IVR Setup - Configure a multi-level IVR for each phone number so callers are routed to the agent or department of their choice.
- Voicemail - Configure unique voicemail settings for each phone number to customize the caller's experience.
- Custom Settings - Configure unique business hours, call settings and queue settings for each phone number so each agent and team can customize their phone number according to their unique needs.

Agents Setup

With Talkdesk, you can configure unique settings for individual agents such as voicemail greeting, timezone and business hours. This will ensure that all agents with a dedicated phone number or extension have their own settings for their phone number or extension.

Team Roles Setup

You can define and edit team roles (i.e., agent, support manager, supervisor, administrator, etc.), specify unique Talkdesk settings for each team role and assign agents to specific team roles within Talkdesk.

To configure team roles click "Admin" -> "Roles". By default the following team roles are configured: Agent (can only access the "Agent Dashboard"), Administrator (can access the "Administrator Dashboard", edit preferences and configure settings) and Supervisor (can only access the "Supervisor Dashboard").

To define a new team role, clone roles, define and edit permissions and assign agents to team roles click here.

Ring Groups Setup

Ring groups (AKA Skills or Hunt Groups) are tags that connect numbers to agents. Ring groups also optimize the skills-based routing process as calls are transferred to agents with specific skillsets using ring groups.

For example, let's say you have two teams, Sales and Support, and four agents: Alex (sales agent), Andrea (sales agent), John (support agent) and Sam (support agent). To assign each agent to a ring group, follow these instructions:

1. Add the ring group "Support" to John and Sam in their profile tab
2. Add the ring group "Support" to the Support number in the number settings
3. Add the ring group "Sales" to Alex and Andrea in their profile tab
4. Add the ring group "Sales" to the Sales number in the number settings
5. Click "Save"

Now when someone calls the support line they will be routed to either John or Sam based on their availability and when someone calls the sales line they will be routed to either Alex or Andrea.

Routing Setup

Talkdesk has a few different routing options. By default, Talkdesk ensures that agents that are less specialized (assigned to fewer ring groups), receive the call first when routing calls in a round robin format. This keeps agents with many skills available to field more specialized call types. Alternatively, you can configure Talkdesk to ring all agents in your company at once or ring all agents within a team or department at once.

You can also customize Talkdesk to route calls to an external phone based on agent status and business hours. This allows teams to field calls on a mobile phone or landline when they are away from their desk or when it is outside of business hours.

Preferences Setup
Business Hours

Business hours are the hours that each phone number receives calls. With Talkdesk, you can define different business hours for each day of the week, including weekends, for each phone number or for all phone numbers associated with your account.
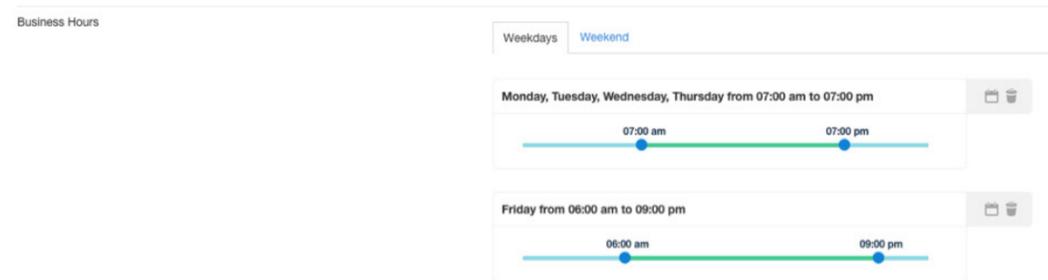
Call Settings

With Talkdesk you can customize your call settings such as whether or not to activate call recording, agent initiated call recording and customized vs. automated outbound Caller ID selection.

Call Dispositions

Call disposition codes are descriptions of the final outcome of the call and are a simple way to label inbound and outbound calls to help keep an entire team on the same page. The disposition code is applied to the call log in the contact's profile as well as on the recent calls lists.

Routing

With Talkdesk, you can customize when and if you receive calls within the browser, on a SIP phone and on an external phone. This affords dynamic teams the flexibility to field calls on the device of their choice.

Queue

Talkdesk allows you to customize your queue settings to accommodate your unique business needs. You can customize the maximum queue size, enable forced queuing, set a waiting time limit and activate features such as callback from queue and queue to voicemail.

Agent Status

Call center agent statuses are helpful for showing an entire team what each agent is up to and whether or not they are free to take calls at any given time. By default, Talkdesk allows agents to choose from the following statuses: Available (free to take calls), Busy (unable to take calls), Away (away from the computer), After Call Work (completed a call and conducting work associated with the call) and Offline (not signed in). Talkdesk also allows you to define new statuses like "Break", "Lunch", "Meeting", "Training", etc. Agent statuses are displayed in real-time in the reporting dashboard and are also used for routing purposes.

Custom fields allow teams to create personalized fields in the contact's profile. Once created, Talkdesk automatically synchronizes the custom fields and their contents with integrated systems such as Salesforce, Zendesk, Desk.com, Highrise and Shopify.
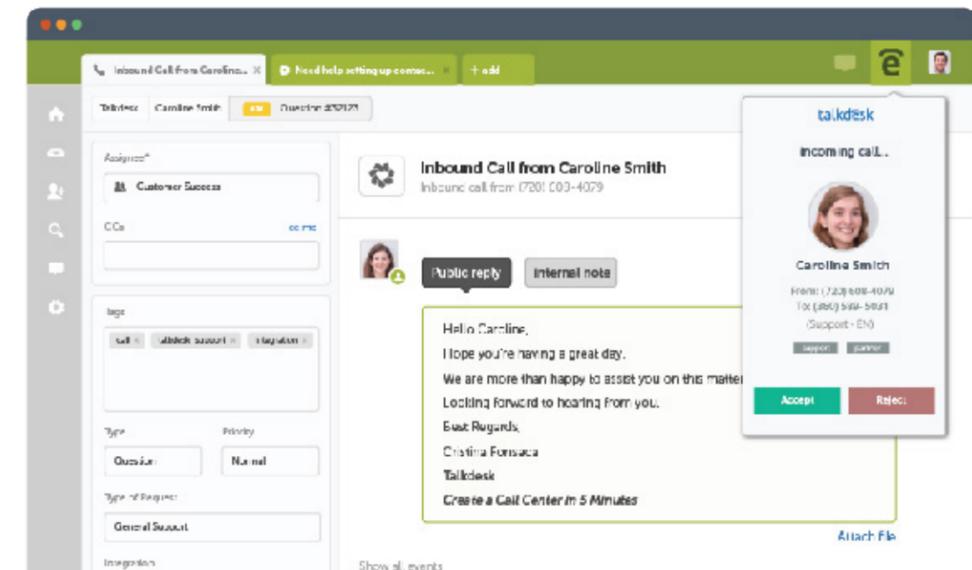
Talkdesk Widget / CTI Integration

In addition to the main application, Talkdesk provides enterprise-level call center functionality access from some of the systems you already use such as Salesforce, Zendesk and Desk.com. For more information about CTI Integrations, watch these webinars (Salesforce, Zendesk and Desk.com).

Google Chrome Extension

With our Google Chrome Extension, you can use Talkdesk to place calls directly from your favorite Helpdesk, CRM, sales software or any other website. All you need to do is click on the phone number and Talkdesk will take care of the rest. With this click-to-call feature you can have all of the functionality of Talkdesk (i.e. IVR, waiting queues, advanced routing, voicemails, etc.) directly from the interface of your favorite software.

Conclusion

Now that you have Talkdesk configured to your unique business needs, you should see your team productivity and customer satisfaction skyrocket. If you don't, please visit our resources page, check out our knowledge base or reach out to support@talkdesk.com for more helpful information.

Happy talking!

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