

Spoke Phone Administrator Quick Reference Setup Guide

TABLE OF CONTENTS

Overview	3
Setting Up Your Spoke Phone Organization and Twilio Account Linking	4
User Management and Automatic Provisioning	5
Single Sign-On	7
Group Management and Setup	8
IVR (Interactive Voice Response) Setup	9
Audio Library	13
Phone Number Management	14
Business Hours and Rules	16
General Account Configurations and Call Recordings	17
Desk Phone and SIP Trunks	19
Spoke API Endpoints	20
Webhooks and Real Time Data	22
CRM Integrations	23
Flex Plug-Ins	24
Outbound Numbers and Caller Lists	26
Advanced Custom Form Building	27

Overview

The Spoke Phone administration guide is for Phone & Call Center Managers who configure and monitor users, IT Administrators installing products within your business, and general business product administrators. It provides a quick-reference guide to configuring the core components of the Spoke Phone System.

Prerequisites

1. An existing or new Spoke Phone account.
2. Administrator Access to your Spoke Account.
3. Administrator Access to your Twilio Account [If you are deploying Spoke into your Twilio Account].

Setting up your Spoke Phone organization and Twilio account linking

When [Signing up for Spoke Phone](#) you can choose to deploy Spoke to your own Twilio account (the Twilio Cloud) or deploy to the Spoke Cloud if you do not have your own Twilio account. The Twilio Cloud option is for administrators who have their own Twilio account.

Deploy Spoke to your Twilio account if you meet any of the below criteria:

- Have/Use Twilio Flex
- Want to build on Twilio
- Have an IT Team or SI Partner that implements and manages key internal systems

Setup your Spoke Account and link to your Twilio account by visiting:



<https://account.spokephone.com/twilio>

PS: Twilio Trial Accounts have limited functionality, you will be restricted by Twilio when making calls, even though you may still have free credit given to you by Twilio.

The below article outlines the limitations you should know about:



Limited Calling on Free Twilio Trial Accounts

Spoke Phone also provides a Cloud account for administrators who do not have their own Twilio account and meet the below criteria:

- Don't want to build anything on Twilio
- Have simple phone system needs
- Will have between 5 - 500 users on Spoke

You can setup your Spoke Cloud Account by following this link:



<https://account.spokephone.com/signup>

Once your Spoke Phone account is created, you will automatically be placed in a 30 Day Trial period, giving you the ability to test Spoke Phone. Your account will move into an Active status after you complete the payment registration section.

This section is located within the [Spoke Administration Console](#) under the **Other** → **Subscription** left Menu.



Please follow the **Understanding the Subscription Page** article for more information.

User Management and Provisioning

Spoke Phone provides administrators three different ways to create users within their Spoke account. Users you add will be sent an invitation email giving them instructions on how to download the Spoke App on their mobile and desktop devices. Once the Spoke App is downloaded and they have completed the login process, users will be able to make and receive calls on their devices.

- Manually Add Users
- Bulk Upload Users
- Provision Users Automatically through Directory Sync ([LDAP](#))

Manually Add Users

The below article will show you how to add users manually to your [Spoke Phone Account](#). Users you add will be sent an invite to download the app on their mobile phones or Desktop computers. Once the app is downloaded and the user has completed the login process, users will be able to make and receive company phone calls on their devices.



How to manually add a user in Spoke Phone

Bulk Upload Users

You can invite up to 1,000 users to Spoke Phone at a time, using the bulk-add and invite feature in Spoke Phone. When you upload users an email is sent to those users inviting them to download the app and log in to your company phone system. The user only needs their company email address to log in and use Spoke Phone.



How to bulk upload users to Spoke Phone



User Management and Provisioning

Provision Users Automatically through Directory Sync

Organizations use directories from providers such as Azure, Okta or Workday to easily manage users and enforce access to their organization resources. Directories enable IT admins to activate and deactivate user accounts, create groups that inform access rules, accelerate adoption of new tools, and more.

Directory Sync or AD Sync is the process of syncing eligible employees from the directory into applications like Spoke.

Spoke's Directory Sync provides seamless user life cycle management by keeping your Spoke account in sync with your corporate user directory whenever there are changes to users, groups, or access rules in the connected directory. The below articles provide a Directory Sync Overview, Configuration to your provider and Best Practices:



Directory Sync Overview



Configuring Spoke Directory Sync to your Directory Provider



Directory Sync Best Practices



Single Sign-On

Spoke Phone supports [Single Sign-On \[SSO\]](#) to enable your users to easily log into Spoke Phone apps with their existing enterprise credentials. SSO is supported for Spoke Phone mobile apps, desktop apps, and the Spoke Phone Account Portal for company administrators.

Spoke Phone's SSO supports SAML 2.0, widely implemented by many enterprise applications including Microsoft, Google, Salesforce and also supported by many identity provider platforms [IdPs] such as Okta or Onelogin.

You can easily set up SSO with any Identity Provider [IdP] that supports SAML 2.0. We have created step by step guides for the following common providers:



Google



Microsoft Azure Active Directory (MS Cloud)



Salesforce



Okta



Onelogin

Other providers that support SAML 2.0 will have very similar steps and SSO with Spoke Phone should be easy to configure following a similar process.

When a user authenticates through the IdP, the user's email is matched against the Spoke Phone user. The user is granted access to the Spoke Phone App if the matched Spoke Phone user has the appropriate Spoke Phone role for that App.

Once you have completed and tested your SSO, you can force users to only use SSO when logging into the Spoke App.



Single Sign-On Overview



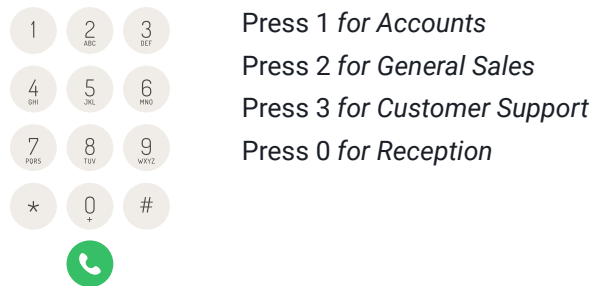
Force Users to Log in with Single Sign-On



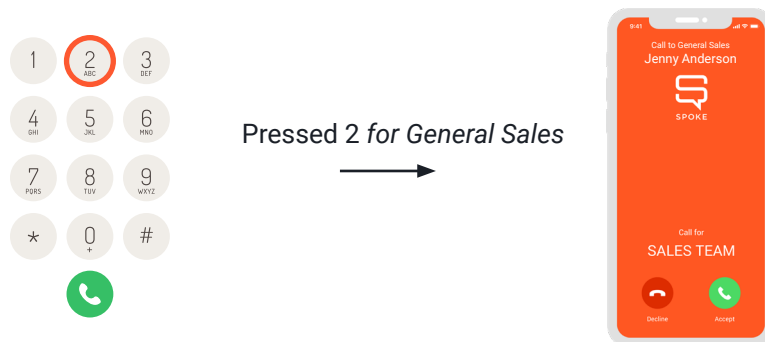
Group Management and Setup

Call groups (sometimes known as hunt groups) are used to offer incoming calls to teams of people rather than to a specific person. For instance, sales, customer support, and reception desks are good examples of call groups.

When creating Call Groups, you first have to consider how many IVR (Interactive Voice Response) options you will present to a customer when calling your company. If you present four options to your customer as shown below:



Then you want to create a Call Group for each option presented. This will help your customer to quickly get routed to the correct person that can manage the call, and also show the Spoke User receiving the call, which option the customer selected as shown below:



The below articles will show you how to create a call group, add users as members of the call group and configure the Call Group Rules.

-  **Call Group Overview**
-  **Add or edit a call group**
-  **Add users to a call group**
-  **Call Group Rules**

IVR (Interactive Voice Response) Setup

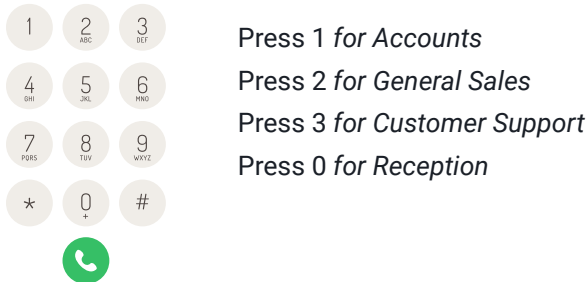
You can create a rich immersive IVR to increase your customer experience when reaching out to your company. Before setting up your IVR, you first need to determine what type and structure you want presented to your customer including the number of selectable options.

There are two main types of IVR categorization:

- Single Tier IVR (This is a single IVR with options 0-9)
- Multi Tiered IVR (This is more than one IVR and includes sub IVR selections)

Single Tier IVR

A Single Tier IVR can be set up directly in the [Spoke Phone Administrator Console](#) by using a combination of Call Groups and Audio Library options. Let's use a four option IVR as an example:



Create a call group per IVR option as shown in the Group Management and Setup section in this guide (please note the Reception call group is already set up by default and you can rename this call group to more meaningful name, should you wish to).

IVR (Interactive Voice Response) Setup

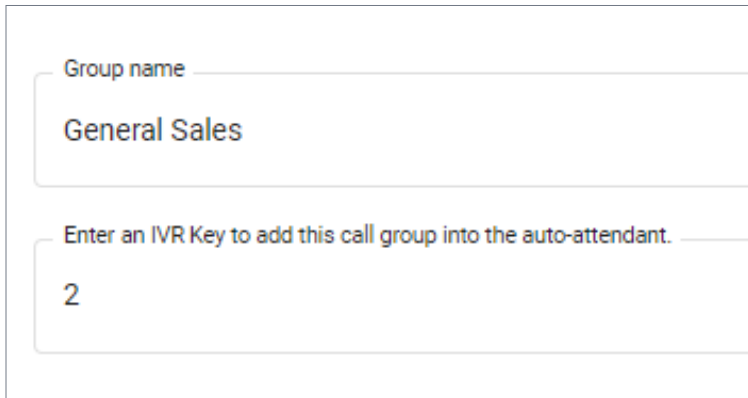
Once the call groups are created and setup, insert the number your customer will press during the IVR when calling your company. Edit your call group and add the relevant IVR number into the second option [enter the IVR key to add this call group into the auto attendant].

Step 1

Within your [Spoke Phone Admin Console](#), **Edit** your Call Group by clicking on the Pencil in the **Call Groups** → **Manage Call Groups** left menu.

Step 2

Add the IVR Option to match your IVR Audio Options presented to your customer.



The screenshot shows a form with two input fields. The first field is labeled "Group name" and contains the text "General Sales". The second field is labeled "Enter an IVR Key to add this call group into the auto-attendant." and contains the number "2".

Spoke Phone will automatically build an IVR using text-to-speech when you add the IVR keys to your call groups. You can test the IVR by calling your main number you linked to your Spoke Account during the Spoke Account Setup process.

IVR (Interactive Voice Response) Setup

If you want to record and upload your own custom audio for your IVR, please go to the **Audio Library** on the left menu to upload and set your new audio. The below articles provide a step-by-step guide to audio library customization:



Audio Library Overview



How to customize your audio library



Recording high quality audio messages

You can also enable extension based routing within your IVR, for when customers who call your company know the extension number of the person or call group they are trying to reach. This option can be enabled within the Spoke Administration Console by clicking on the **Other** → **Advanced** left menu and then selecting the **Other** tab. **Enable the 'Allow Callers to Dial by Extension Number'** feature. The below article provides more information about this feature:



How to Setup Dial by Extension

PS: Every User and Call Group created in Spoke Phone will automatically receive an extension number. You can change these extensions or view all extensions by following the below links:



View all Extensions for your Organization



IVR (Interactive Voice Response) Setup

Multi-Tier IVR

Multi-tiered IVRs provide multiple selections for your customers, with main and sub menu options when reaching out to your company. These IVRs can also include data exchange functionality to use CRM data to send calls to specific places depending on status, account type etc.

A multi-tiered IVR needs to be created within the Studio Feature on your Twilio Account. Twilio Studio provides the ability to create a multi-tiered IVR and customize the customer experience when reaching out to your company. Calls can be delivered to both Flex and Spoke Phone users in the front or back-office through a single flow, by using TwiML redirect widgets, check availability functions and configuring the IVR end points to match your business needs and specification.

Routing calls from your Studio Flow to your Spoke Phone Account requires extension numbers for users or groups (depending on where you want to send the call), including your Spoke Phone Organization ID. Spoke Phone also provides Studio functions you can install to perform availability checks on user or group extensions, including directory lists for additional routing options.

Spoke Phone can help you achieve your desired IVR build by utilizing one of our [Professional Services Packages](#). You can also build your own Twilio Studio Flows by following the links below:



Integrating Studio to Spoke Overview



Deploying Spoke's Twilio Studio Functions



Download an Example Spoke / Studio Flow



Audio Library

You can customize the sounds, greetings, messages, voicemail and queue music in Spoke Phone, or use the default sounds and automated greetings. We recommend you personalize Spoke Phone to align with your company branding and customer experience.

Spoke Phone supports different audio types you can use when uploading your audio.

- Main Company Greeting
- After Hours Message
- Waiting/Hunting Audio
- On Hold Audio
- Call Group Greetings
- Voicemail (Group or Users)
- Disclaimers for call recordings announcements

The below articles provide a step-by-step audio library customization guide:



Audio Library Overview



How to customize your audio library



Recording high quality audio messages

When using Twilio Studio to create your multi-tiered IVR, you will need to use Twilio Assets (see panel on the right) to upload and host your IVR audio.

Twilio Assets is a static file hosting service that allows developers to quickly upload and serve the files needed to support their applications. With Twilio Assets you can host your files that support web, voice, and messaging applications. Twilio Assets is frequently used to host **.mp3** audio files used in TwiML and Studio Flows, to serve images sent through MMS, or to store configuration used by Twilio Functions.



Twilio Runtime Assets

Phone Number Management

There are two different ways to manage your phone numbers depending on the type of Spoke Phone account you have.

Please follow the section that applies to your account type:

Spoke Accounts deployed within your Twilio Account (Twilio Cloud)

When you deploy Spoke Phone to your Twilio account, the number buying process is managed within your Twilio account under the **Phone Numbers** → **Manage** → **Active Number** menu within your [Twilio Console](#).

Once you have purchased or ported your desired phone numbers to your Twilio account, you can then manage and assign numbers to call groups or individuals within the [Spoke Administrator Console](#). The below articles provide steps for number management:



How to Manage Twilio Phone Numbers



How to Activate Twilio Numbers within Spoke Phone



How to Assign Activated Twilio Numbers to users or Groups

If you create a Studio Flow for your multi-tier IVR (covered in the IVR Setup section of this Admin guide), you will need to assign your Twilio phone Numbers to your Studio Flow. The logic configured within your Studio Flow will dictate where calls are delivered to within Spoke Phone.

Please note: For SMS in Europe please contact customersuccess@spokephone.com to enable your account for SMS once you have procured your numbers.



Phone Number Management

Spoke accounts deployed without Twilio (Spoke Cloud)

Administrators can manage company phone numbers from the [Spoke Phone account portal](#). The below article will show you how to buy and delete phone numbers including number assignment to call groups or users.



How to buy and delete phone numbers



How to assign numbers to groups or users

Please contact the Spoke Phone support team if you need assistance with number porting from your current provider to either Twilio or Spoke.

Business Hours and Rules

Spoke Phone provides 'Standard Business Hours' functionality for calls coming from your Spoke Attendant IVR. The business hours can be set up by following the **Office Hours** left menu within the [Spoke Administrator Console](#).

When adding new office hours, you can set a different after hours message to play to customers. You can upload this message in the **Audio Library** section in the Spoke Administrator Console. You can also select which call group is responsible for attending to the voicemail message left by customers during closed business hours.

DAY	OPEN?	FROM - TO
Monday	<input checked="" type="checkbox"/>	09:00 - 17:00
Tuesday	<input checked="" type="checkbox"/>	09:00 - 17:00
Wednesday	<input checked="" type="checkbox"/>	09:00 - 17:00
Thursday	<input checked="" type="checkbox"/>	09:00 - 17:00
Friday	<input checked="" type="checkbox"/>	09:00 - 17:00
Saturday	<input type="checkbox"/>	Office Closed
Sunday	<input type="checkbox"/>	Office Closed

The below articles provide a step-by-step configuration and setup process you can follow:



How to set up office hours



How to set up holiday greetings and change rules for the holidays

Calls sent to Spoke users or groups from Twilio Studio Flows, will need to use the Twilio business hours function to set up office hours. You can use the **Run Function** widget to call the business hours Function and return open or closed parameters within your Studio Flow. The below articles can help you set up your business hours function for Studio Flows:



Twilio Business Hours and Time of Day Routing



Spoke Phone Studio Flow Example including Business Hours



Time Zone Identification for Twilio Function

General Account Configuration and Call Recordings

Spoke Phone includes configurable functions for your organization within the **Other** → **Advanced** menu inside the [Spoke Administrator Console](#).

Call Recording

Spoke Phone can record phone calls in clear HD Audio, and safely store them for future use. You can decide which calls need to be recorded and provide your users the ability to turn on/off during calls. You can also set up a disclaimer message to be announced before calls are connected, for both inbound and outbound calls. Below are step-by-step articles you can follow for setup:



Call Recording Overview



Compliant and secure call recordings



Access your recordings

Call Highlight Tags

Spoke Phone call highlights can easily capture something you or someone else just said on a call, giving you the ability to replay that specific section of the call recording in the future. With call highlights, you no longer need to listen to the entire recording just to extract one or two important notes. Rather, you can simply play the highlight. The below overview article can show you how to setup and use the call highlight feature:










How to use call highlights and customize tags



General Account Configuration and Call Recordings

Other

The Other tab within the Advanced settings provides a host of features / functions that you can enable for your Spoke Account.

-  **Allow callers to dial by extension**
-  **Attach audio files to voicemail notification emails**
-  **Default ring time before personal voicemail picks up**
-  **Activate Add to CRM button for users**
-  **Hide employee mobile numbers from other employees in the Spoke app**
-  **Exclude employee mobile numbers from Spoke API responses**
-  **Turn on searchable directory support for large organizations**

Desk Phones and SIP Trunks

SIP Phones / Devices

You can add SIP Devices (desk phones, conference phones, common area phones, and softphones) to Spoke Phone using industry-standard SIP (Session Initiation Protocol).

SIP Devices can be assigned to a user (so their desk phone rings/make calls from a desk phone), or left as stand-alone devices for common areas, such as conference rooms and breakout areas.



How to add a desk phone or softphone device

SIP Trunks

Spoke Phone can be connected to external phone systems or contact centers. Using SIP trunks, you can send inbound calls from other communication systems into Spoke Phone, or send calls from Spoke Phone out to other communication platforms.

By configuring a SIP trunk to Spoke Phone you can then configure your existing platform to forward calls using SIP to a Spoke Phone user, device, or a team of people in a call/hunt group, and vice versa. Spoke Phone can also send calls back to your infrastructure using the same SIP trunk. Moreover, calls from Spoke Phone can be configured to go out via your existing carrier partner, using your existing call plans.



How to create a SIP trunk to/from Spoke Phone



Sip Trunking Overview



Spoke API End-Points

The Spoke Phone API allows you to connect Spoke to your existing business systems in a variety of ways.

Access to the API

If you have a Spoke Phone account, you can access the Spoke Phone API via <https://integration.spokephone.com>. This production endpoint provides access to your live user data.

API Key Access Creation

1. Login to the [Spoke Phone Account portal](#).
2. Navigate to Other > Developers.
3. Generate a new API key by pressing the + Add API Key button.
4. All existing API Keys are listed in the table.

Access the Spoke Unified [Directory](#) via the Directory endpoint. This endpoint provides comprehensive details about each Directory entry, including Availability.



Read more about the Spoke Directory and its core concepts

Upload customer, supplier and other CRM contacts into Spoke Phone via the [Phonebooks](#) and [Contacts](#) endpoint. Once integrated, these contacts become searchable in the Spoke mobile application external phonebook. Any new incoming calls from phone numbers that have matching details in the phonebook will automatically show enhanced caller ID details.

Access detailed call logs via the [Calls](#) endpoint. You can extract this data for reporting, real-time analytics or even integrate them back into customer records in your CRM system.

Spoke API End-Points

View Spoke **User** status via the Users endpoint, and build a custom dashboard to see who is available in real-time.

Add SIP trunk extensions to the Spoke Unified Directory by managing your Spoke SIP Trunk integration via the **Trunks** endpoint. Integrating with this endpoint and its associated **Trunk Devices**, **Trunk Users** and **Trunk Queues** endpoints allows you to synchronize your legacy internal phone directory with Spoke, giving your Spoke users a unified view across your entire organization.

Send system generated SMS messages on behalf of Spoke users who have SMS enabled DDI numbers via the **Conversations** /messages endpoint. The messages will be automatically added to the user's conversations in the Spoke application.

Subscribe to **webhook events** so that your systems can be notified when call and conversation related events occur on the Spoke platform.

Create **Data Actions** to customize your call workflows

Webhooks and Real-Time Data

Spoke supports [webhooks](#) as a mechanism for notifying your systems when an event occurs. Webhooks are useful for listening to asynchronous events occurring on the Spoke platform, such as changes to a call's state over time; a change to the contact associated with a call; or a call recording becoming available.



Available Webhook Events



Types of Events

To get started, you will need to configure a webhook in the Spoke account portal. During configuration you will be given the option to specify event types you wish to receive notifications for. You will also be required to provide a valid, publicly routable HTTPS URL that accepts POST requests with the application/json content type.



How to create a new Webhook



Securing Your Webhooks



Delivery Attempts, Retries and Event Ordering

Every Spoke event sent to your webhook is wrapped in a standard JSON wrapper that provides important information about the event, such as its type, a timestamp of when it was created, and the event data itself.



CRM Integrations

Spoke Phone's CRM integration syncs CRM leads and contacts into your Spoke Phone account, and logs all calls and text messages made on Spoke Phone against both lead and contact records in your CRM.

If users have Spoke Phone standard or pro licenses, they are able to dictate call notes and follow up after calls, which are transcribed into text and also added to the customer record in your CRM.

Spoke supports numerous CRMs as shown below. If your CRM is not on the list, Spoke can perform a manual integration to your CRM if it supports Rest API or Webhook data POSTS, through our [Professional Services team](#).



Active Campaign



Copper CRM



Dynamics 365



HubSpot



Pipedrive



Salesforce



Sugar CRM



Zoho



Flex Plug-Ins

Spoke Directory Plugin

The Spoke Directory plugin adds a Spoke tab to the Flex Agent call forwarding menu. This tab contains a list of the entries in your Spoke directory, allowing Flex agents to transfer incoming calls to any of your contacts in Spoke Phone.

Before deploying the plug-in, make sure that Twilio Flex is configured to use React 16.13.1

- From the [Twilio Flex Admin Panel](#), navigate to Developer Setup
- Check that the selected React version is set to Latest (~16.13.1)



How to Deploy the Directory Plugin

Spoke Speedy Operator Console Plugin

Spoke Speedy is a plugin for Twilio Flex that installs an Operator Console that enables scalable and fast search and call transfer capability within Twilio Flex.

Please note: there are additional charges for Spoke Speedy.

Before deploying the plug-in, make sure that Twilio Flex is configured to use React 16.13.1

- From the [Twilio Flex Admin Panel](#), navigate to Developer Setup
- Check that the selected React version is set to Latest (~16.13.1)



Flex Plug-Ins

How to Deploy the Spoke Speedy Operator Console



Inside Spoke Phone Management Console:

Step 1: Login to the Spoke Admin Portal

<https://account.spokeyphone.com>

Step 2: Go to the **Integrations** left menu and click on **Add Integration**.

Step 3: Find the **Spoke Speedy for Twilio Flex** and click on **+ ADD**.

Step 4: Select the Phone Number you want to show as the **Caller ID** when a call is transferred.

Step 5: Click on the **DEPLOY** button.



Activating Speedy for Flex Users inside the Flex Admin Console:

Step 1: Login to your Twilio Console

<https://www.console.twilio.com>

Step 2: Search for **Workspace** and select the **TaskRouter Workspaces** option.

Step 3: Click the Workspace configured for your Flex account.

Step 4: Click on the **Workers** option on the left and select the worker you want to activate.

Step 5: Add one of the below attributes to the end of the existing **ATTRIBUTES** string:

Option 1: Auto POP Speedy when calls are accepted - "speedy_launch_mode":"auto" EXAMPLE BELOW:

```
{"contact_uri":"client:leon_2Ecoertzen","full_name":"Leon Coertzen","image_url":"https://www.gravatar.com/
```

Option 2: POP Speedy when transfer are selected for an ongoing call - "speedy_launch_mode":"manual" EXAMPLE BELOW:

```
{"contact_uri":"client:leon_2Ecoertzen","full_name":"Leon Coertzen","image_url":"https://www.gravatar.com/
```

Outbound Numbers and Caller Lists

Allowable Caller ID (ANI) Lists are lists of phone numbers that employees are allowed to select when making outbound calls. A Caller ID (or ANI) is the number shown to the person you are calling. By creating and assigning Allowable Caller ID (ANI) Lists, you control what phone numbers your employees are able to select.

Example: You may have multiple departments, business units, or brands. When placing an outbound call, a single salesperson may want to call from brand A or brand B, etc.



How to create and assign Allowable Caller ID Lists



How to Set Up The Company Outbound Caller ID Rules

The Outbound Data Action Function allows you to programmatically change the default state/configuration of an outbound Spoke call, at the point the call is about to be placed. When you set up Spoke, you set up company defaults for items such as call recording, the Caller IDs customers see when your team makes calls, etc. Outbound Data Actions allow you to change this default behavior on a call-by-call basis.



How to Set Up Outbound Data Actions

Advanced Custom Form Building

You can create mobile forms within Spoke Phone to present the Spoke Phone user with a mobile-first form to collect data during an active phone call. *Please note: you must have Spoke CX licenses to access forms.*

Mobile forms can be used to:

- Standardize the collection of call disposition codes and associated data, or just apply your existing call wrap-up process on your team's mobile phones.
- Collect market insight data by prompting your teams to take the opportunity to collect and record data whilst interacting with a customer.
- Improve your customer relationships and maximize opportunity by collecting key account information during or after mobile phone calls. You may want to:
 - Capture details for a sales order
 - Prompt your sales team to capture qualifying questions
 - Capture critical business insights and account data

Below are some helpful articles to get you started:



Getting Started with Form Design



Learn Custom Form Basic Design



Learn Custom Form Advanced Design



How to Customize Custom Forms

For all other questions

We have a comprehensive knowledge base of articles and common questions at

<https://support.spokephone.com/hc/en-us>

THANK YOU

