SPOKE PHONE

USER GUIDE

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Getting started

Getting started

Our app is packed with rich features made simple to use on a mobile phone or computer
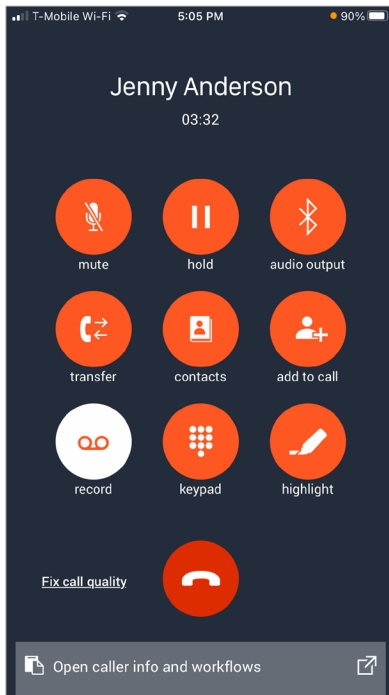
Call recording
Securely record, document and store calls that occur on any mobile phone, desk phone, or device.
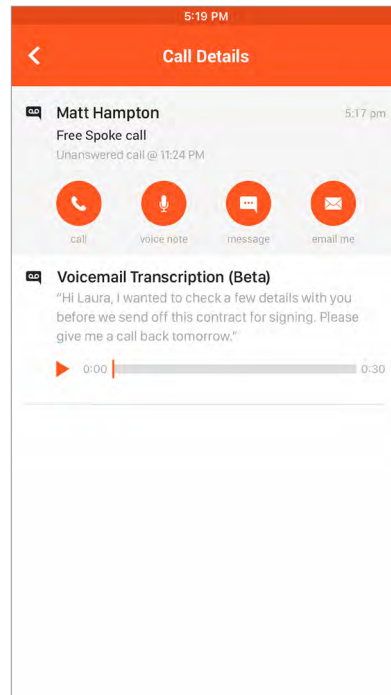
Transcribed voicemail
Voicemails are recorded, transcribed, and sent to email, making catching up on missed calls easy.
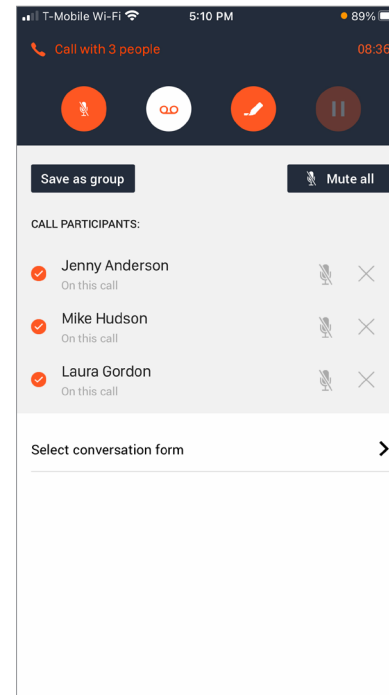
Conference calling
If you've tried to start or join a conference call on the move, you'll love one-touch mobile conferences.

Mobile forms
Create mobile-first forms to collect data during an active phone call.

Explore all our feature here.

Getting started

Installing the Spoke Phone app on your mobile phone

Step 1: Download the app

Download and install the Spoke Phone app from the Apple App Store or Android Play Store.

Step 2: Auto-updates

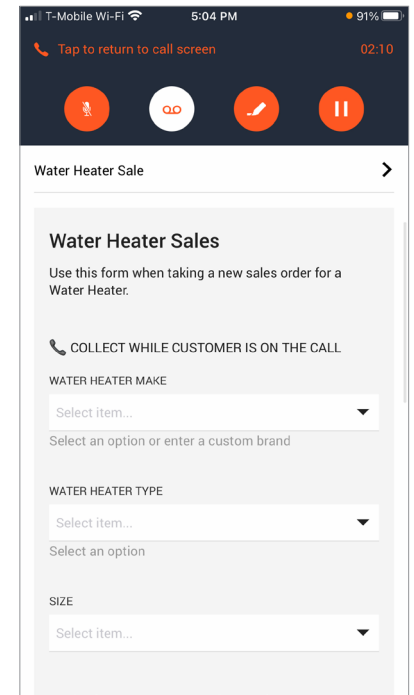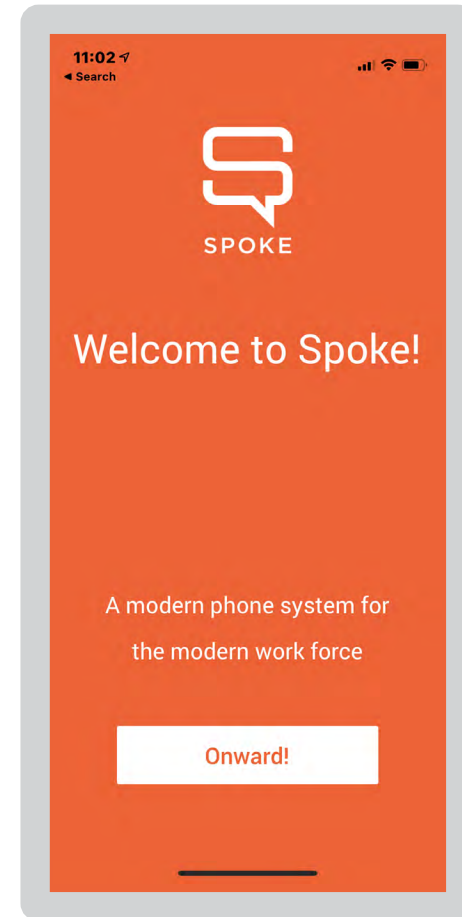Set your phone to automatically update apps so you've always got the latest version of Spoke Phone.

Step 3: Log in

This step requires your administrator to have sent you an invite to join your company's Spoke Phone account. Once you have been invited, you will be notified by text message or email.
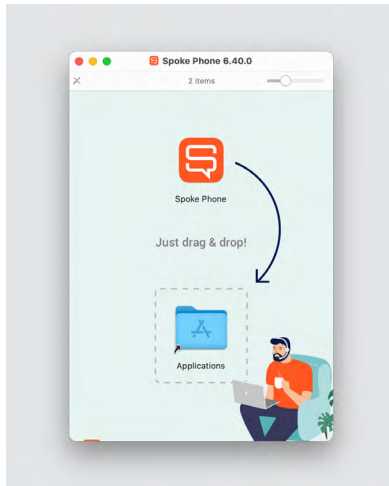
Getting started

Installing Spoke Phone desktop app - Mac OS

Step 1

To download desktop app, go to https://spokephone.com/download/ and click button to download for Mac.

Step 2

Once downloaded, click to open.

Step 3

Click and Drag the Spoke Phone icon to the Applications Folder.

Step 4

Open Applications folder locate the Spoke Phone app and double-click to launch.

Step 5

Click Open on pop-up asking for confirmation to open.

Step 6

The app will open and prompt you to log in.
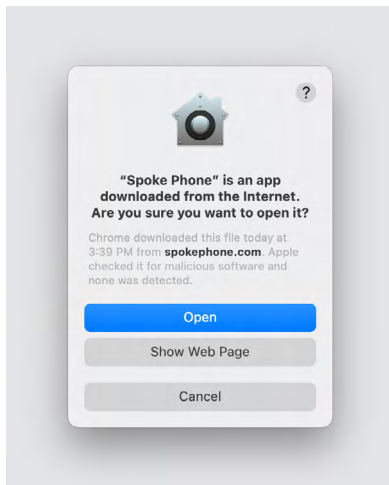
Installing Spoke Phone desktop app - Windows

Step 1

To download desktop app, go to https://spokephone.com/download/ and click button to download for Windows.

Bypass the Windows protector screen, by clicking 'More Info'.

Step 2

Select 'Run anyway'.

Step 3

Select 'Anyone who uses this computer' for who this application should be installed.

Step 4

Click 'Finish' to complete the set-up.

Step 5

The app will then open and prompt you to log in.

Getting started

Logging in to the Spoke Phone app on your mobile and desktop

Step 1

If you are logging in to the Spoke Phone app on your mobile ensure your phone is connected to 4g/5g data or wifi.

If you are using your desktop make sure its connected to wifi or plugged into the network.
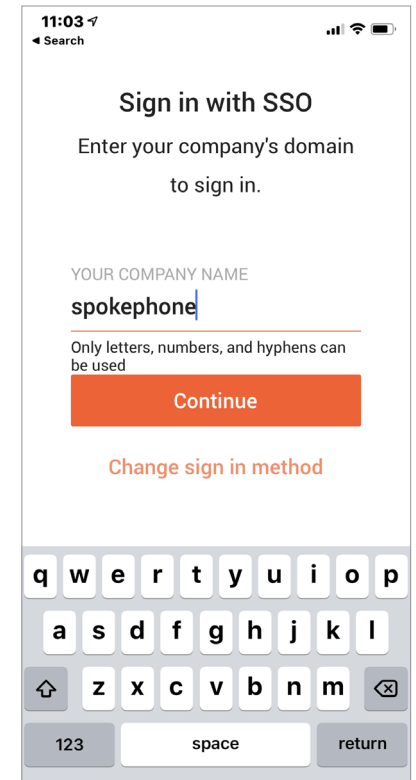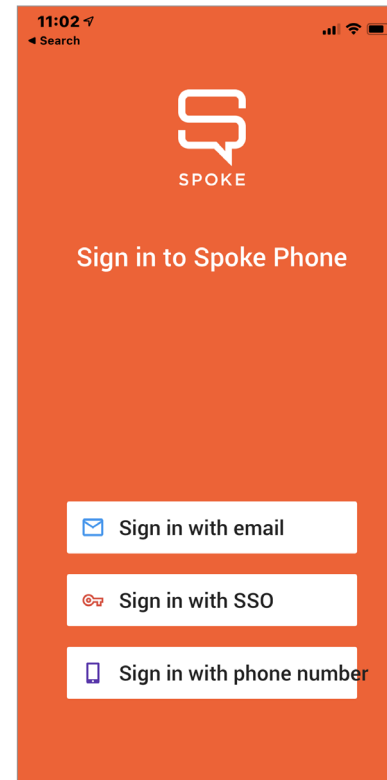
Step 2

Open the app and follow the prompts.

Step 3

Select to sign in with email, SSO, or with phone number (see screen on the right).

Step 4

Enter your mobile phone number, email address, or company name for SSO to verify your account and log in (see screen

Getting started

Recommended headsets

Sennheiser Circle SC 230 wired monaural headset for desk phone
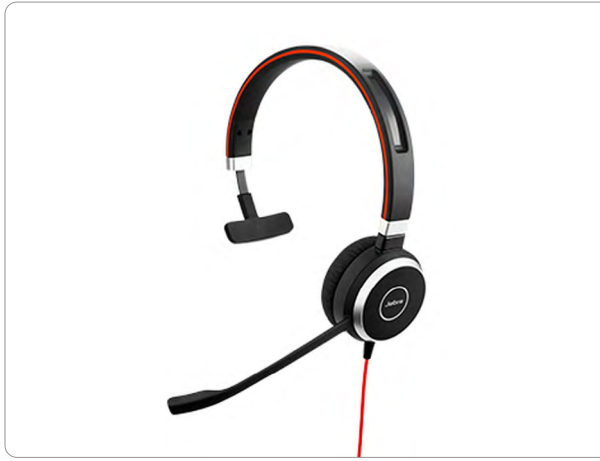
Jabra Evolve 40 UC stereo headset

Please Note: the use of mono or Bluetooth headsets, earphones, and other wireless headsets are not recommended as they are not compatible with the Spoke Phone desktop application and you may experience quality-related issues.

Getting started

How to set up your headset on Mac

Enabling microphone permissions

Step 1
Search in the taskbar for Security & Privacy, then Privacy, then Microphone.
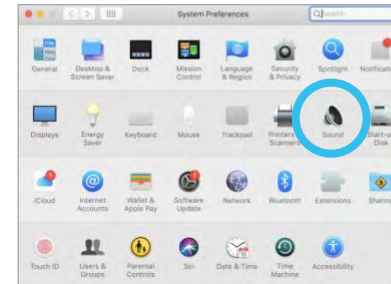
Step 2
Click on the lock in the lower left-hand corner of the screen. Enter your device password.

Step 3
Select Spoke Phone so that the blue tick shows.

Step 4
Click on the lock again to make changes. Plugin your headset, then please make sure to reload your Spoke Phone application to apply the changes.

Default set your headset

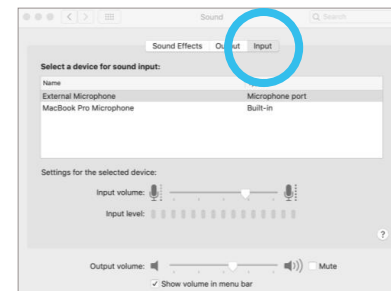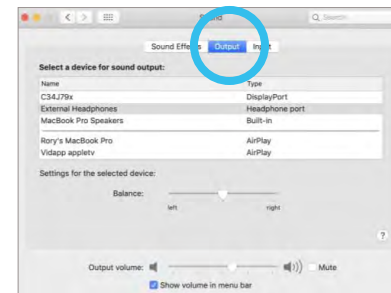**Step 1**
Open your System Preferences and select Sound.

Step 2
Select your headset from the sound Output list.

Step 3
Select your headset from the sound Input list.

Step 4
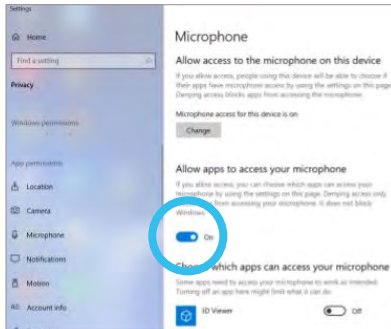Restart the Spoke Phone app.

Getting started

Setting up your headset on Windows

Enabling microphone permissions

Step 1
Open your Settings application.

Step 2
Go to Privacy, then Microphone.

Step 3
Toggle on the Microphone for the device.
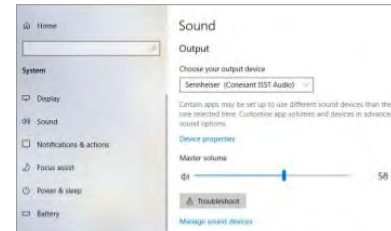
Default set your headset

Step 1
Open your Settings application.

Step 2
Go to System then Sound.

Step 3
Select your headset from the sound Output list.

Step 4
Select your headset from the sound Input list.

Step 5
Go to Advanced sound options and ensure that your Spoke Phone app device preferences are correctly selected.

Step 6
Restart the Spoke Phone app.

Getting started

Optimized router

Spoke Phone uses VoIP technology, to make phone calls over the internet. So your internet connection needs to be good! Let's get started with your router.
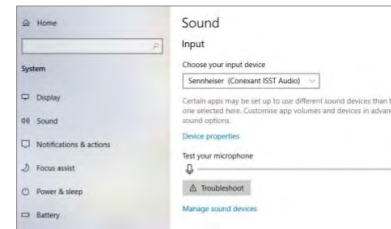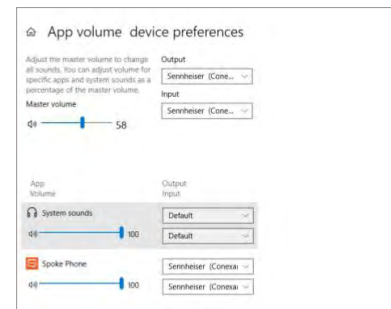
- Spoke Phone recommends using a VOIP router which will prioritise your call even when your network is experiencing high volumes of traffic.
- Having fast wifi is only part of what you need because fast doesn't matter if your phone call is stuck behind other things.
- You must configure your router for VOIP - visit support.spokephone.com to find out how.
- We like the Ubiquiti Unifi router.

Spoke desktop app - computer requirements

- 64-bit version of Windows 10+, or macOS 10.14+
- Minimum 8Gb of RAM
- Intel i5 dual-core processor or equivalent

*The Spoke desktop app is not supported on Linux or Chromebook devices

Compatible mobile phones

Apple	
Minimum O/S: **iOS 12**	
Minimum model: **iPhone 7 or above**	
Samsung	
Minimum O/S: **Android 9**	
Minimum model: **Galaxy S8 or above and Note 8 or above**	
Google	
Minimum O/S: **Android 9**	
Minimum model: **Pixel 2 or above**	

Note: The Spoke Phone app can be installed on devices not listed above. However, please note that we cannot guarantee optimal performance on such devices nor are we able to fully provide support for these.

Getting started

Network Bandwidth requirements

The following table lists the network requirements to deliver reasonable audio quality.

Bandwidth (Uplink/Downlink)	100kbps / 100kbps per concurrent call
Latency to nearest edge location (RTT)	< 100ms
Jitter	**< 10ms**
Packet Loss	< 1%

Firewall configuration

To access Spoke and Twilio, your firewall should allow outgoing TCP and UDP traffic from your applications to both Spoke and Twilio's infrastructure and allow return traffic in response. Spoke/Twilio will never initiate a connection to the client applications.

Therefore, the firewall should not allow externally initiated connections back into the network.

How to test your network

Undesirable high latency on your network could be related to file buttering, and translating to low call quality.

Test what's causing traffic on your network by visiting Waveform Bufferbloat Test page at https://www.waveform.com/tools/bufferbloat

Know your Spoke Phone

Know your Spoke Phone

How the directory works
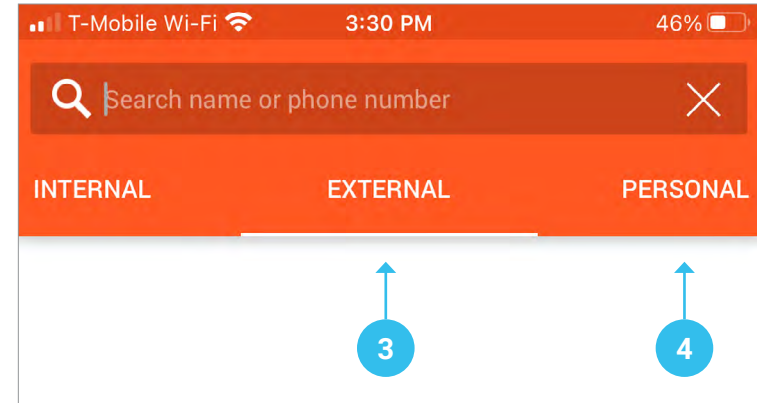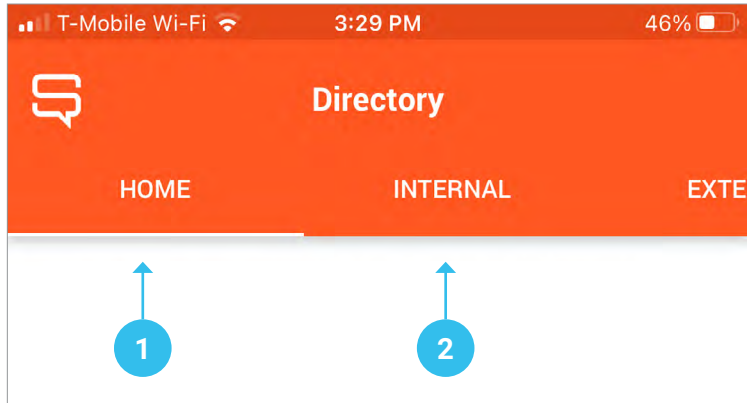
1. Home

Contains custom conference groups created by the user by saving any ongoing conference calls. These saved conference call groups can then be accessed and all participants dialled in one tap.

2. Internal

Shows the full list of users, call groups, and soft and deskphones present in the Spoke Phone web portal. Also shows who is on a call, busy, or offline.

3. External

Search the directory for contacts stored in your integrated CRM or imported contacts list.

4. Personal

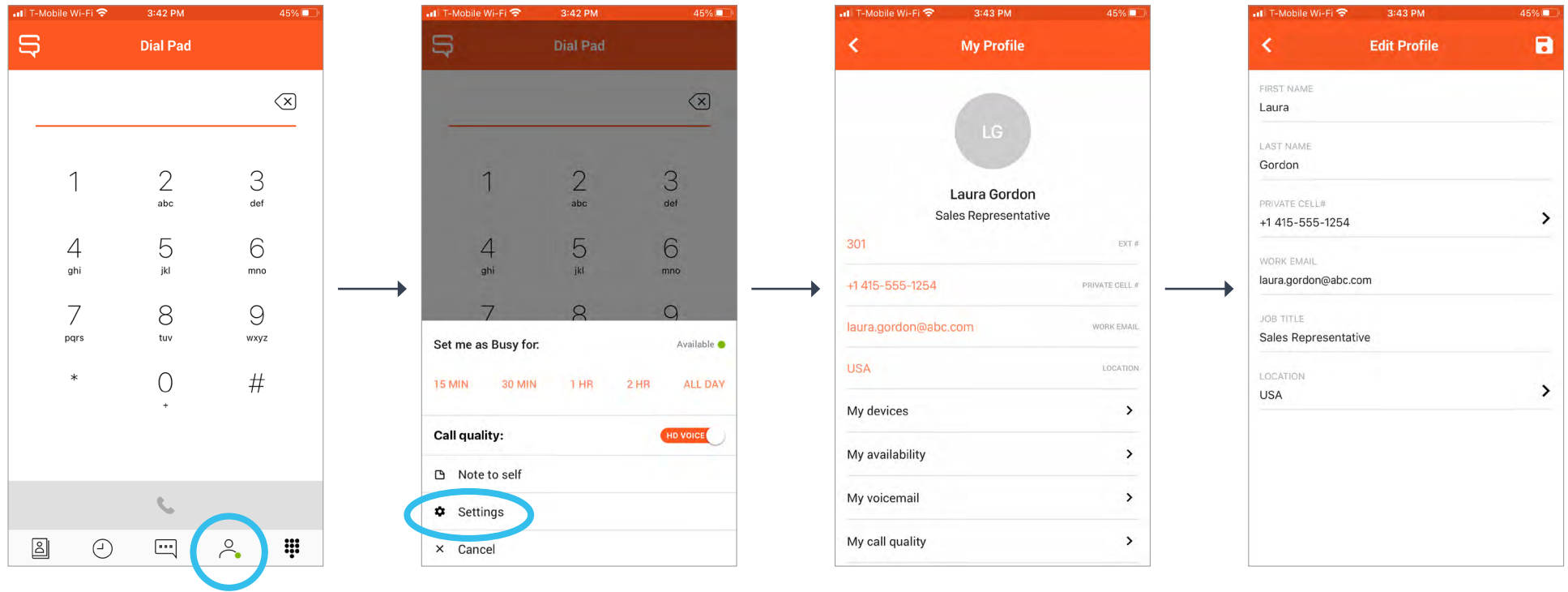Synch personal contacts (optional).

Know your Spoke Phone

How to manage your profile from settings

Under the settings you can edit and manage your profile information, see teams you have been included in, and list of number you have been assigned to and much more.

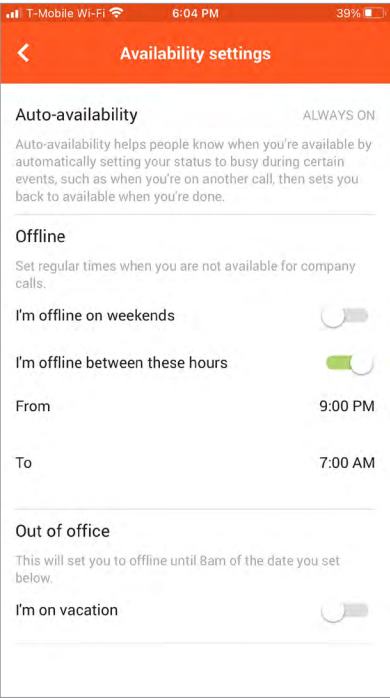**1.** Tap on the person icon located at bottom of screen.

2. Tap 'Settings'.

3. Tap on any of the orange text to edit profile.

4. Edit and manage your profile information.
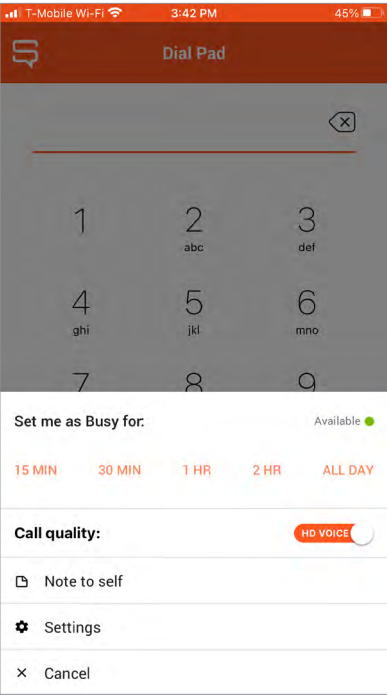
Know your Spoke Phone

To set up automated offline hours:

1. Go to the Spoke Phone app on your phone.
2. Tap on the person icon at the bottom of the app.
3. Tap Settings to go to My Profile.
4. Tap My Availablity from options listed.
5. Set your offline hours.

Note: See previous page for step by step instruction on how to navaigate to My Profile.

Availability status definitions:

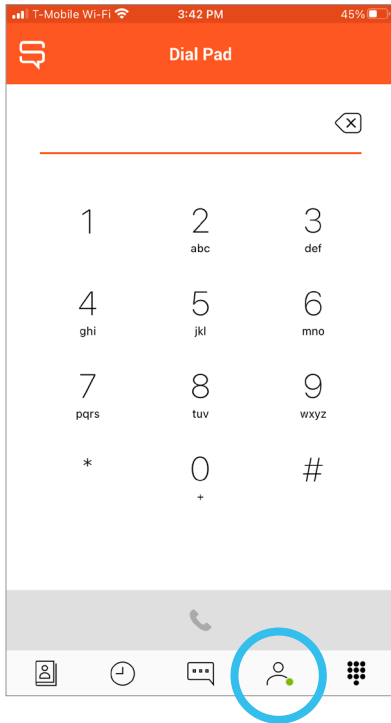| Availability	Type of call you may receive	Notification
Offline ⚪	No call types	No notifications
Busy 🟡	Direct call to you from colleagues in your internal directory Calls that your colleagues have answered and transferred to you	All notifications
Available 🟢	All call types	All notifications

Know your Spoke Phone
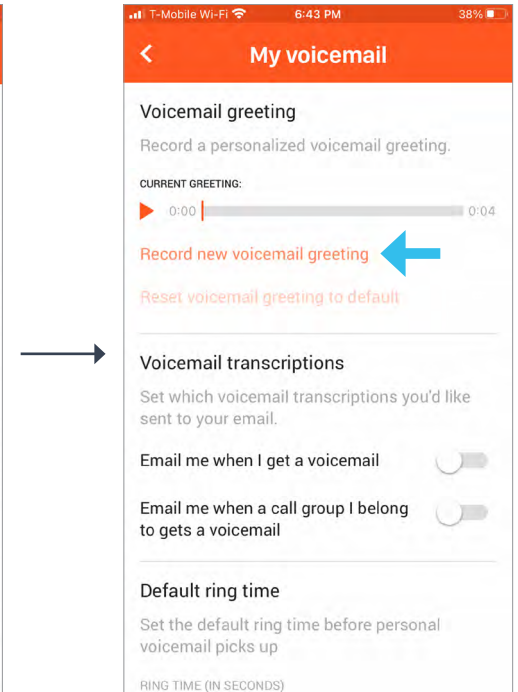
Set up a personal voicemail greeting

1. Tap the person icon at the bottom of the app.
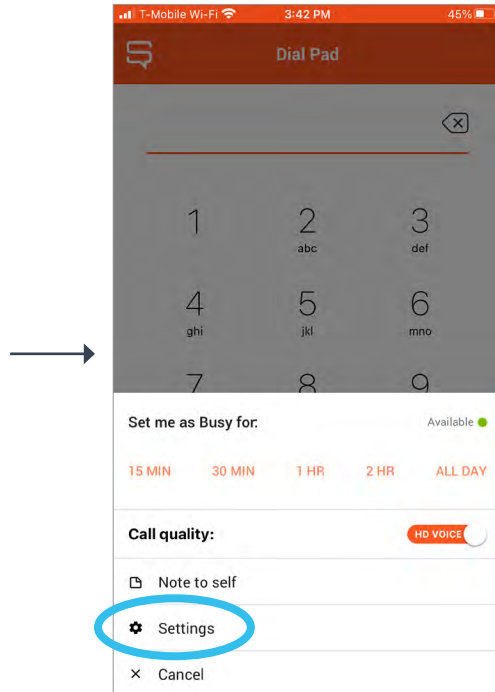
2. Tap 'Settings'.
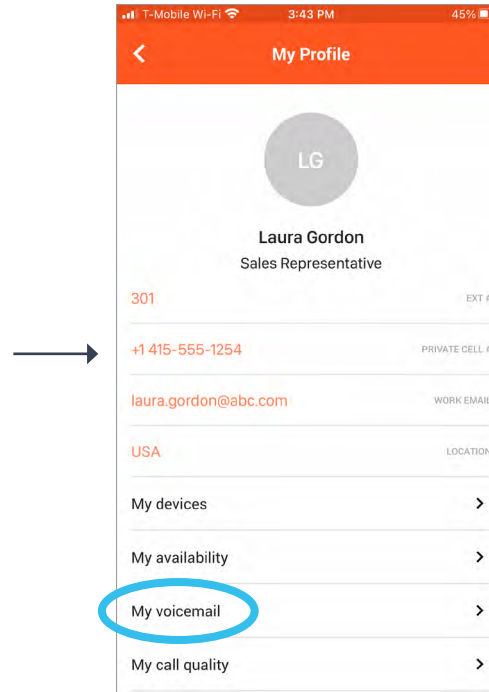
3. Tap 'My voicemail'.

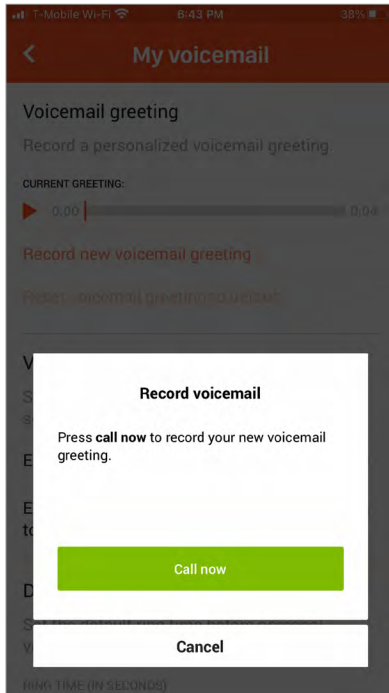**4.** Select 'Record a new voicemail greeting'.

Know your Spoke Phone
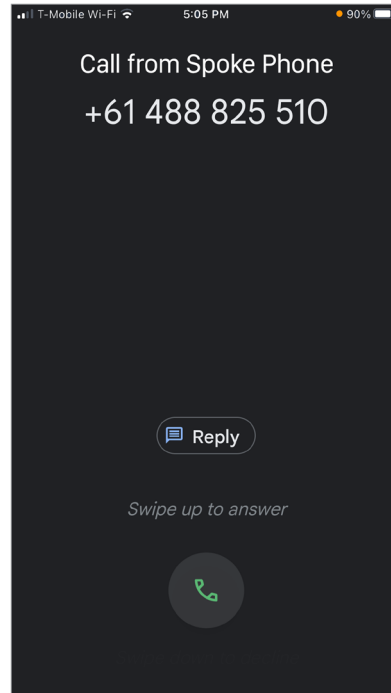
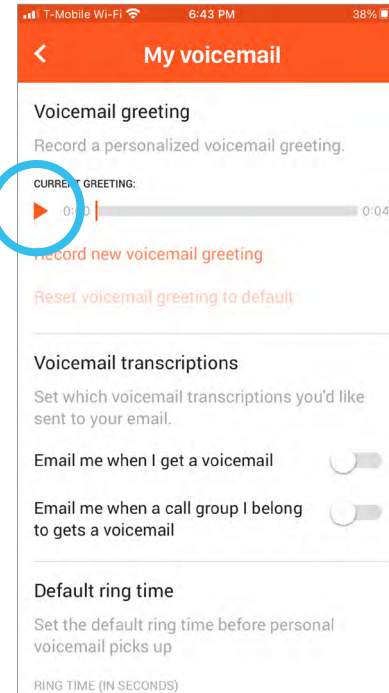## Set up a personal voicemail greeting

5. Once the record voicemail pop-up appears, tap call now. You will then receive a call from Spoke Phone.

6. Once you answer the call, follow the voice prompts to record your personal voicemail greeting.

7. To replay your recorded message, go to my voicemail and tap on the play button.

Know your Spoke Phone

Set wait time before the voicemail message starts

Follow the steps below to control how long a caller waits before your personal voicemail kicks in.
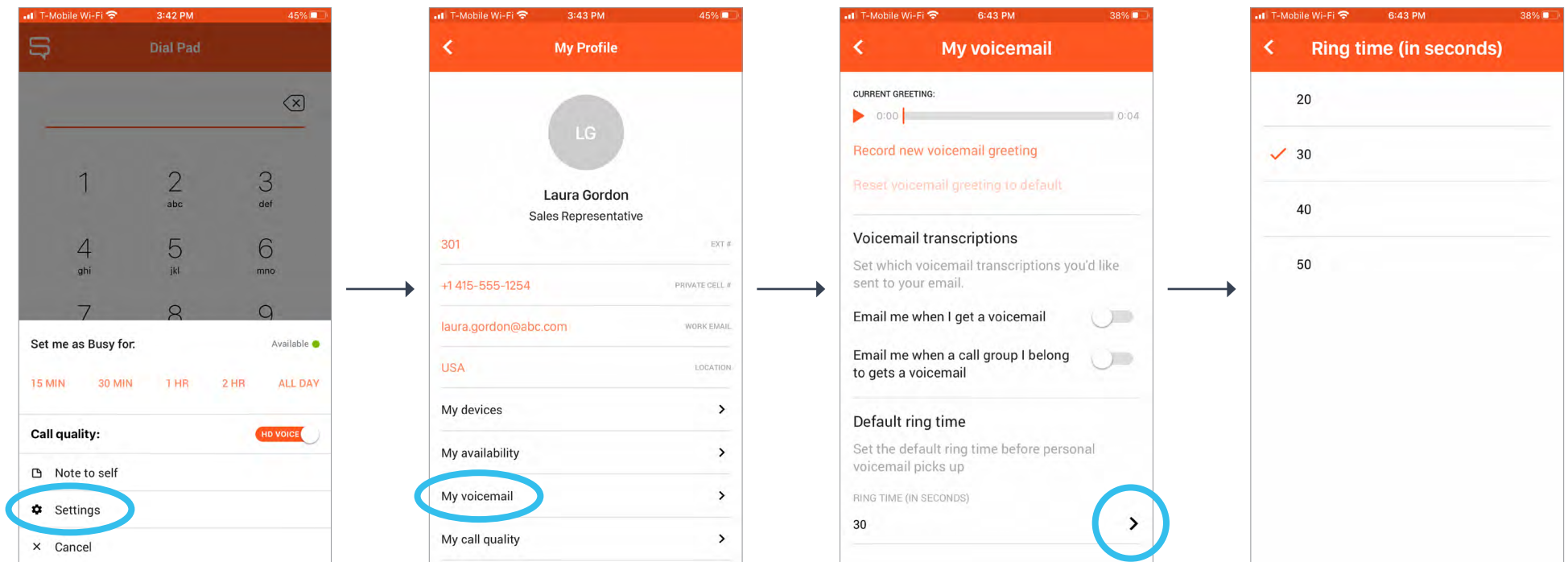
1. Tap the person icon at the bottom of the app, then tap 'Settings'.

2. Tap my voicemail.

3. Look for 'Default ring time' and tap on the arrow.

4. Choose a default time.

Know your Spoke Phone

Send personal voicemail to email

When someone leaves you a voicemail it is transcribed so you can read and/or listen to the message in the Spoke Phone app. You can also have the voicemail emailed to you so you can read and listen to the voicemail from your email.

You can choose to send personal voicemail to your email, as well as voicemails left for any call group that you belong to. Remember that call group voicemail is sent to everyone in the group, not just to you.

Follow the instructions to configure your voicemail to email settings:

Step 1
Tap the person icon at the bottom of the app, then tap 'Setting'
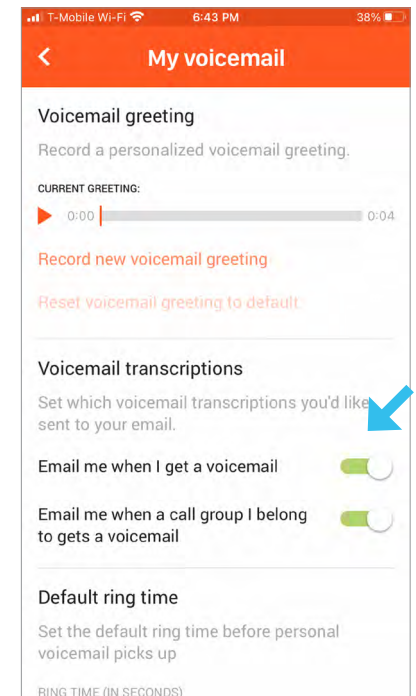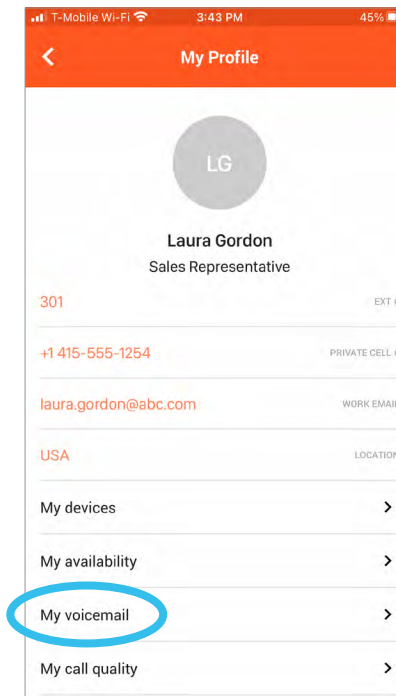
Step 2
Tap my voicemail

Step 3
Under Voicemail transcriptions, you will see two options:

- Email me when I get a voicemail
- Email me when a call group I belong to gets a voicemail

You can toggle either option on, or you can toggle them both on.

Calls and messaging

Outbound calling options

Desktop click-to-call

Receive a call

Features during call

Transferring a call

Conference calling

Team chat

Record in-person

Business SMS

Calls and messaging

Call teammates from your internal directory
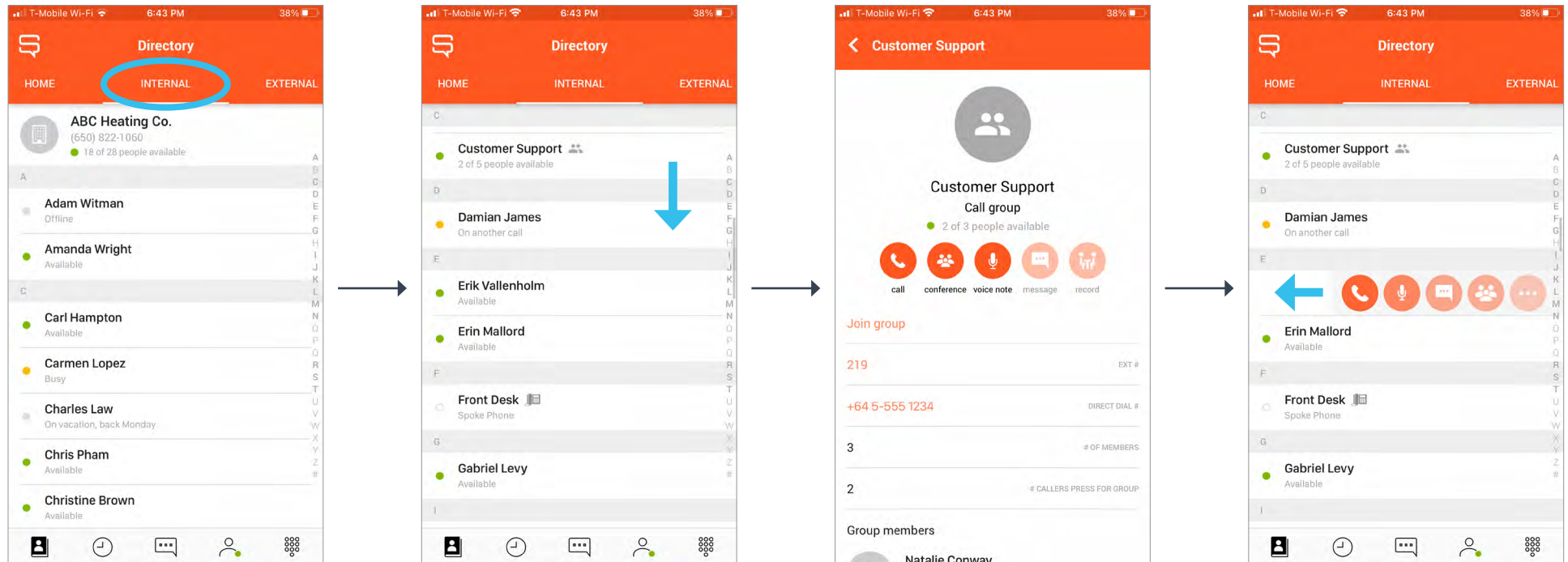
1. Open the Directory in the app, and stay on the internal tab.

2. Scroll down to find your teammate.

3. Tap on a contact to view all details and options.

4. Or, swipe left to quickly access the Call button.

Calls and messaging

Call your own contacts from the personal directory
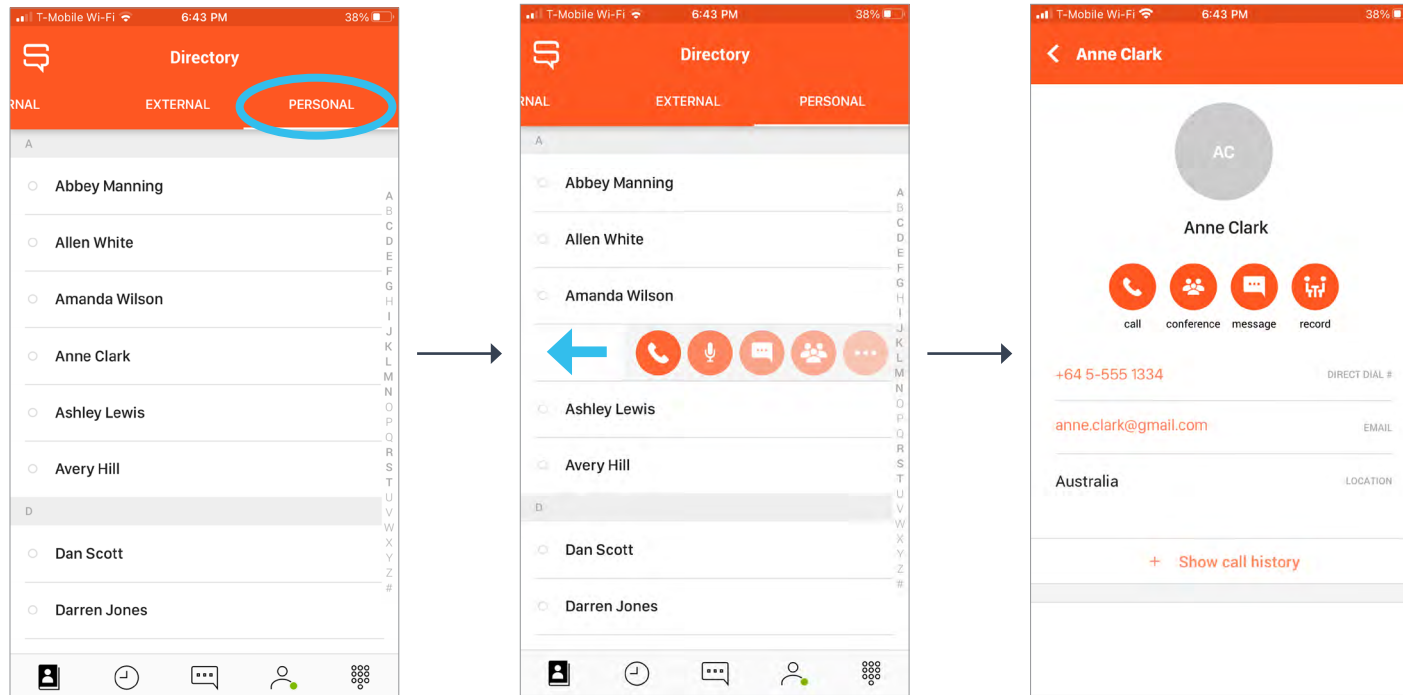
1. Open the Directory in the app, and swipe left on the sliding bar at the top and tap on the Personal tab to see list of your personal contacts.

2. Tap on a contact to open contact profile or swipe left to quickly access the call button.

3. Contact profile

Calls and messaging

Call shared company contacts from the external directory
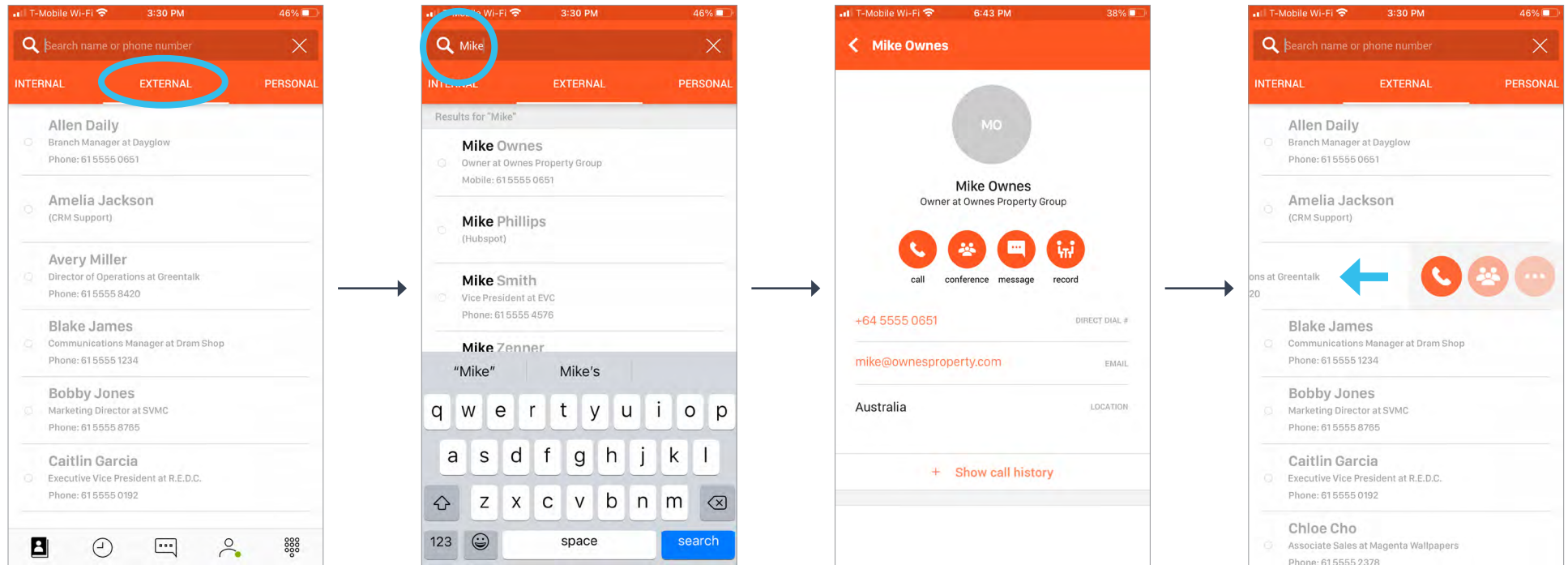
1. Open the Directory in the app, and tap on the External tab to access shared company contacts from your integrated CRM.

2. Tap on the magnifying glass icon and start typing to search. You can search by contact name, phone number, company name, job title, or email address.

3. Tap the contact name to access all options and view more contact details.

4. Or, swipe left on the contact and tap the call button to initiate a call.

Calls and messaging

Call local or international numbers from the dial-pad
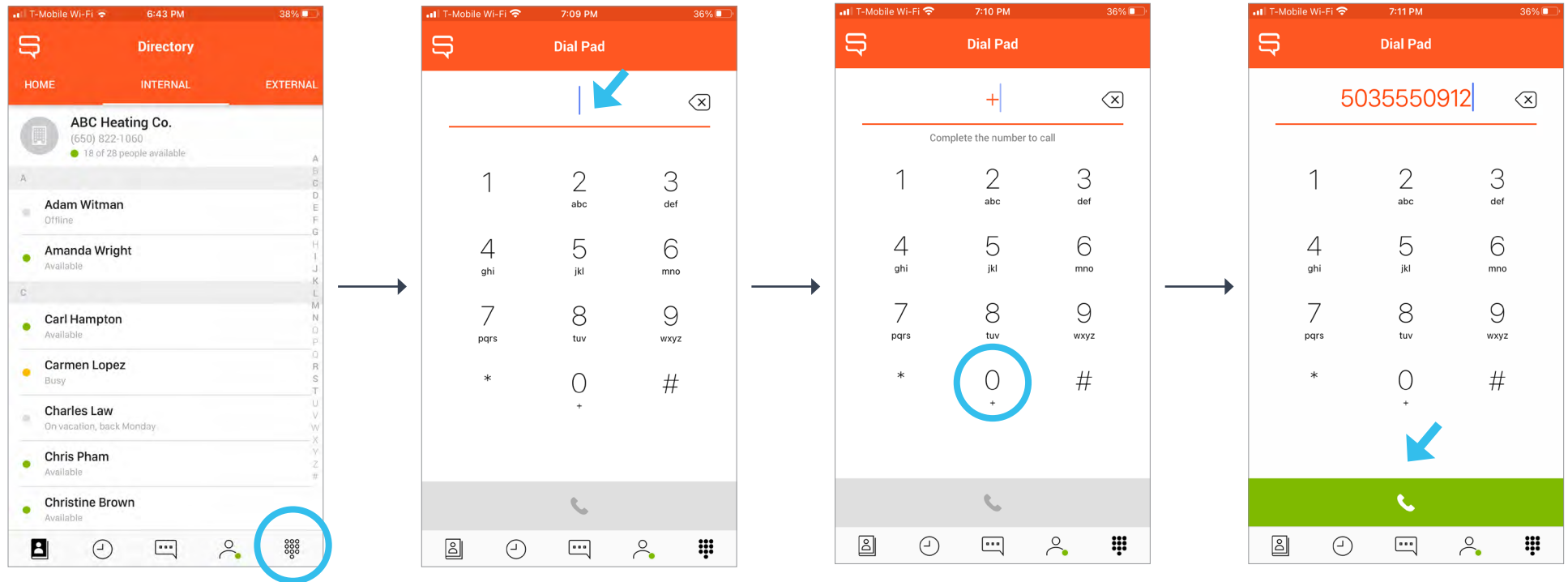
1. To manually dial a number, tap on the dial-pad icon on the bottom-right corner of the screen. And type in the phone number.

2. Or, tap and hold, then release to paste a number copied to your clipboard. Remember to include area code if applicable.

3. When making international calls, tap and hold the Zero (0) key to bring up the + symbol needed to complete the universal format for international call dialing.

4. Once you have typed in the number in the correct format, the dial button will turn green. Tap the green dial button to start calling.

Calls and messaging

How to choose an outbound caller ID as you make a call
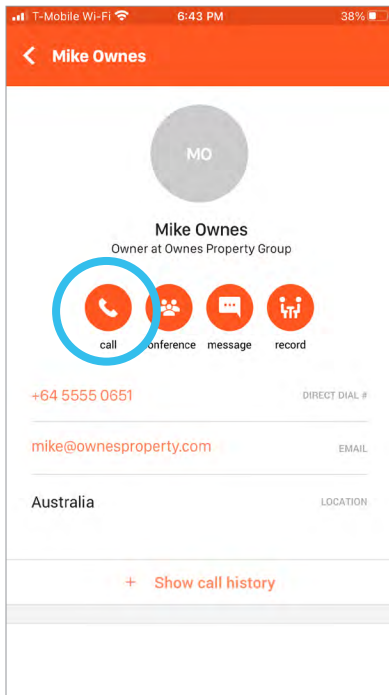
1. Tap and hold the call button for ~1 second.
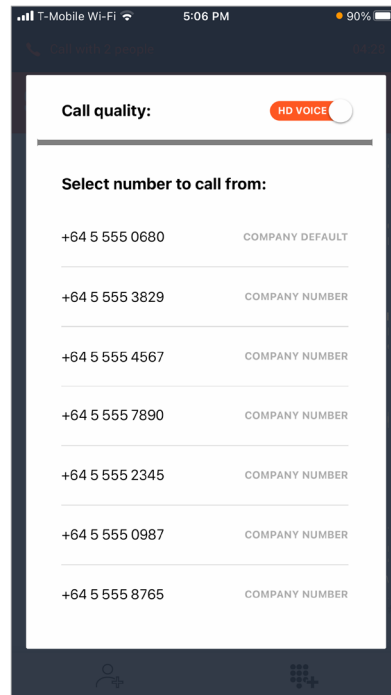
2. After holding for ~1 second, the call options screen will open. Select the number you wish to use as your caller ID.
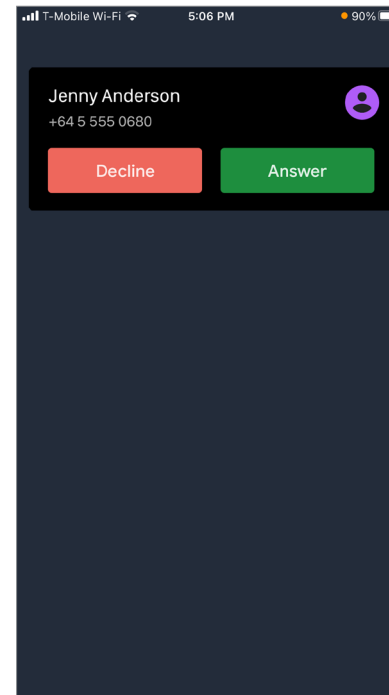
3. As soon as you select a number, the call will start using the caller ID you selected.

Note: Only for external calls.

For more information, please refer to this article for How to Set Up Outbound Caller ID

Calls and messaging

How to make click-to-dial calls on your desktop
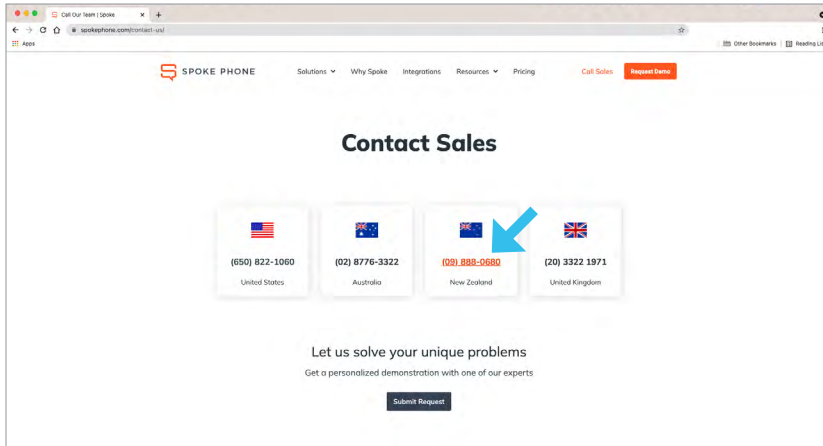
1. Click on a web enabled phone number on a webpage.
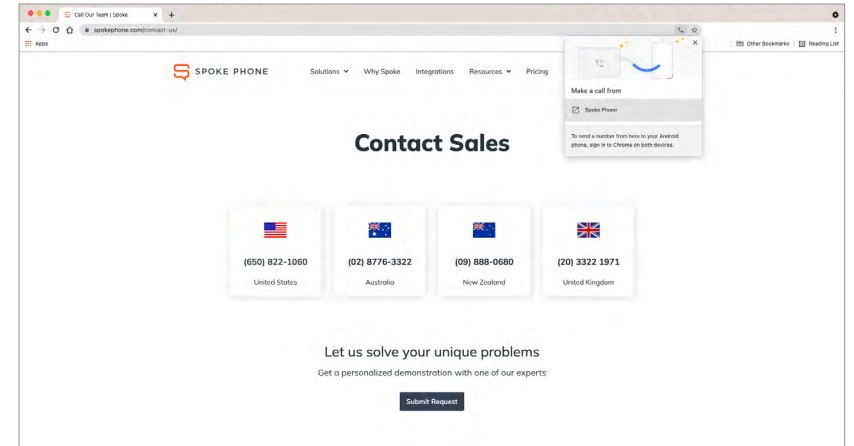
2. A pop-up will appear. Select and click 'make a call from Spoke Phone'.
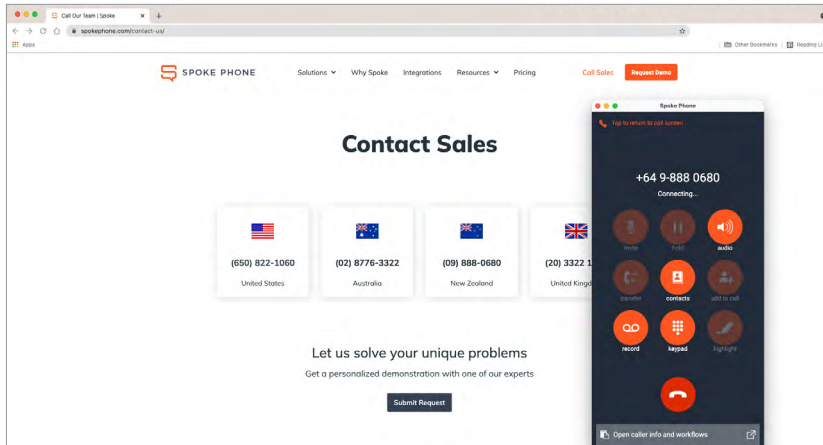
3. The number will dial from Spoke Phone desktop app.

Calls and messaging

Receiving a call

Locked screen on iPhone

Unlocked screen on iPhone
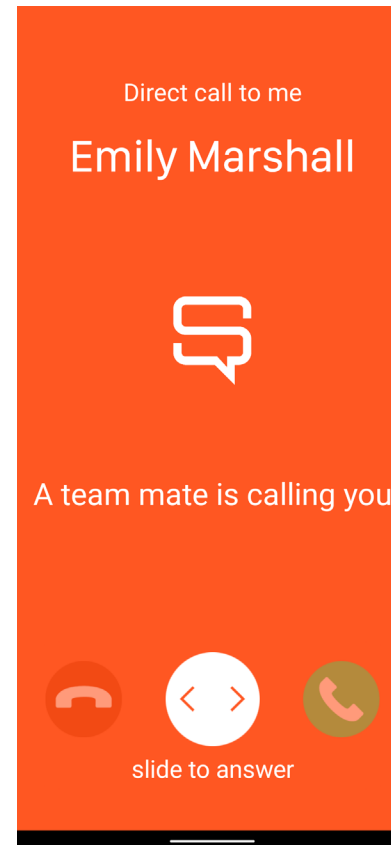
Locked screen on Android
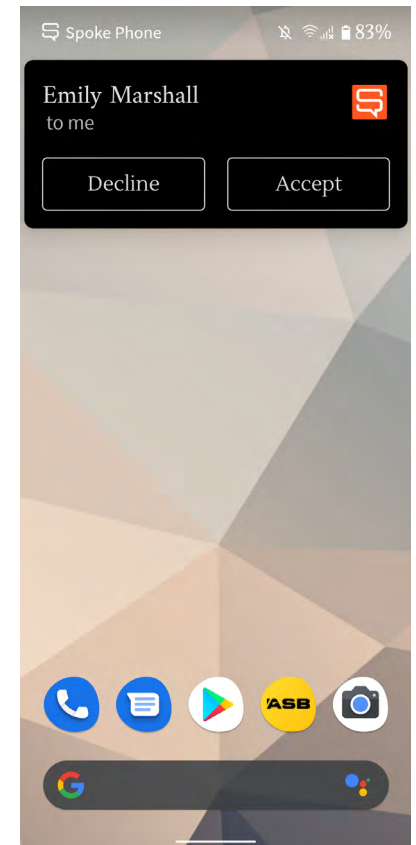
Unlocked screen on Android

Note: Answer screen will vary on different phones models.

Calls and messaging

Features during a call

1   Transfer call

Three different types of 'transfer' actions.

2   Record call

Securely record, document and store calls.

3   Fix call quality

Improve call quality during a live call.

4   Conference calling

Add others during a call for instant one-touch mobile conference.

5   Call highlight

Capture and tag important things you hear on calls and replay later.

6   Workflows

Create mobile-first forms to collect data during an active phone call.
Note: Not available on desktop.

Phone screen showing:
9:41 — Call to your DDI — Jenny Anderson — 03:48

mute   hold   speaker
transfer   contacts   conference
record   keypad   highlight
Fix call quality
Open caller info and workflows

Calls and messaging
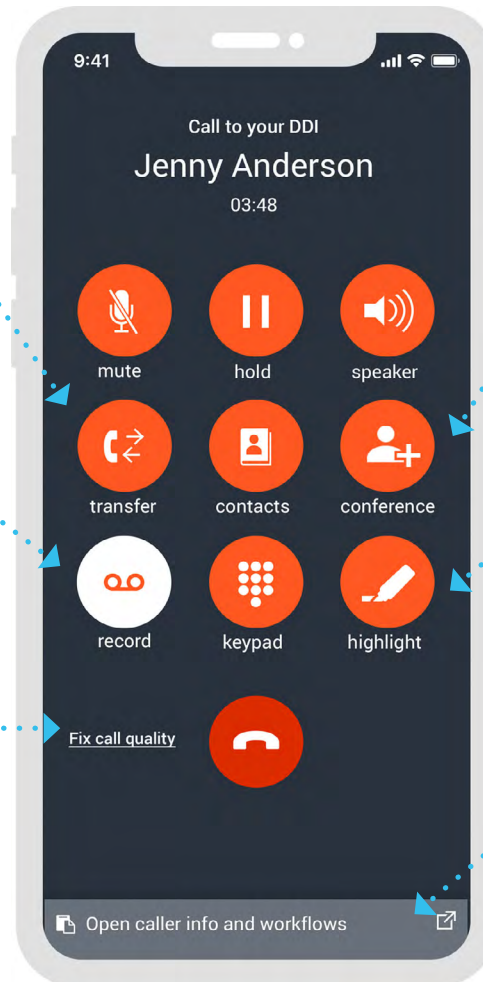
Transferring a call

When you transfer a live call, Spoke Phone gives you three different types of 'transfer' actions to choose from.

Type	Transfer	Announce then transfer	Send to voicemail
Description	The direct Transfer option will immediately end your call and start calling the colleague you selected. When your colleague answers, they will be talking to the original caller.	The Announce then Transfer option will keep the original caller on hold while connecting you with the colleague you are transferring the call to. This allows you to privately brief your colleague, then connect the call and leave, or, connect the call and stay for a 3-way conversation.	The last option is to Send (the caller) to voicemail. This allows the caller to leave a direct voice message for that specific person, without disturbing your colleague by ringing their phone.

Calls and messaging

How to transfer a live call

1. If your phone screen is locked, unlock your phone. Tap the transfer button on the call screen.

2. This will load a list of your colleagues in the Internal directory. Scroll down to the relevant person and tap Transfer to.

3. A screen will pop up giving you options to: Transfer, Announce then Transfer, or Send to Voicemail. Select from the list of available transfer options.
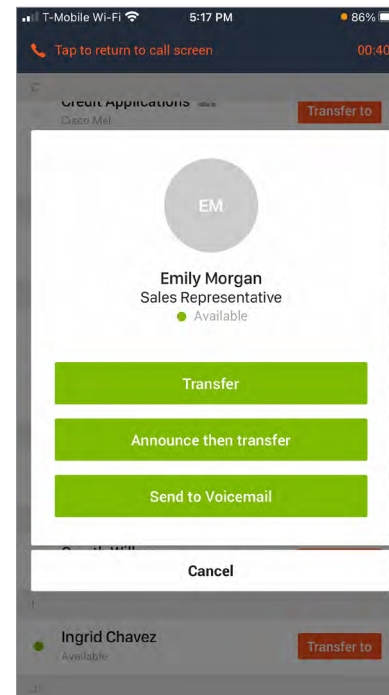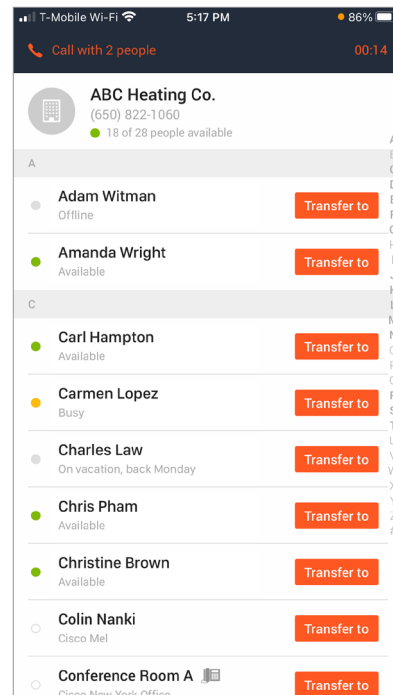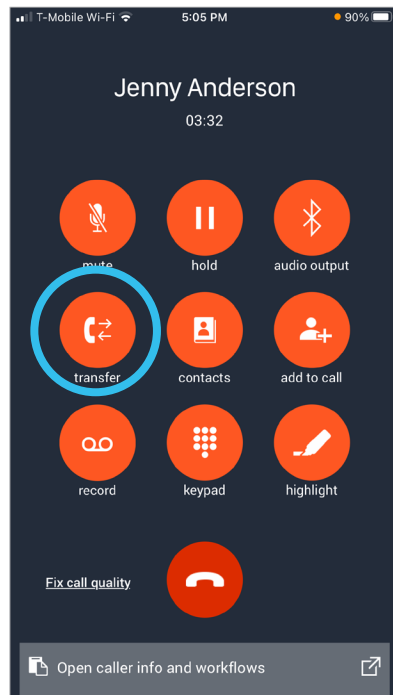
Transfer

Your call will end and the original call will be connected to your colleague.

Announce then transfer

You will be connected to your colleague while the original caller remains on hold.

Send to Voicemail

Your call will end and the original call will be connected to your colleague's direct voicemail.

Calls and messaging

How to transfer a live call
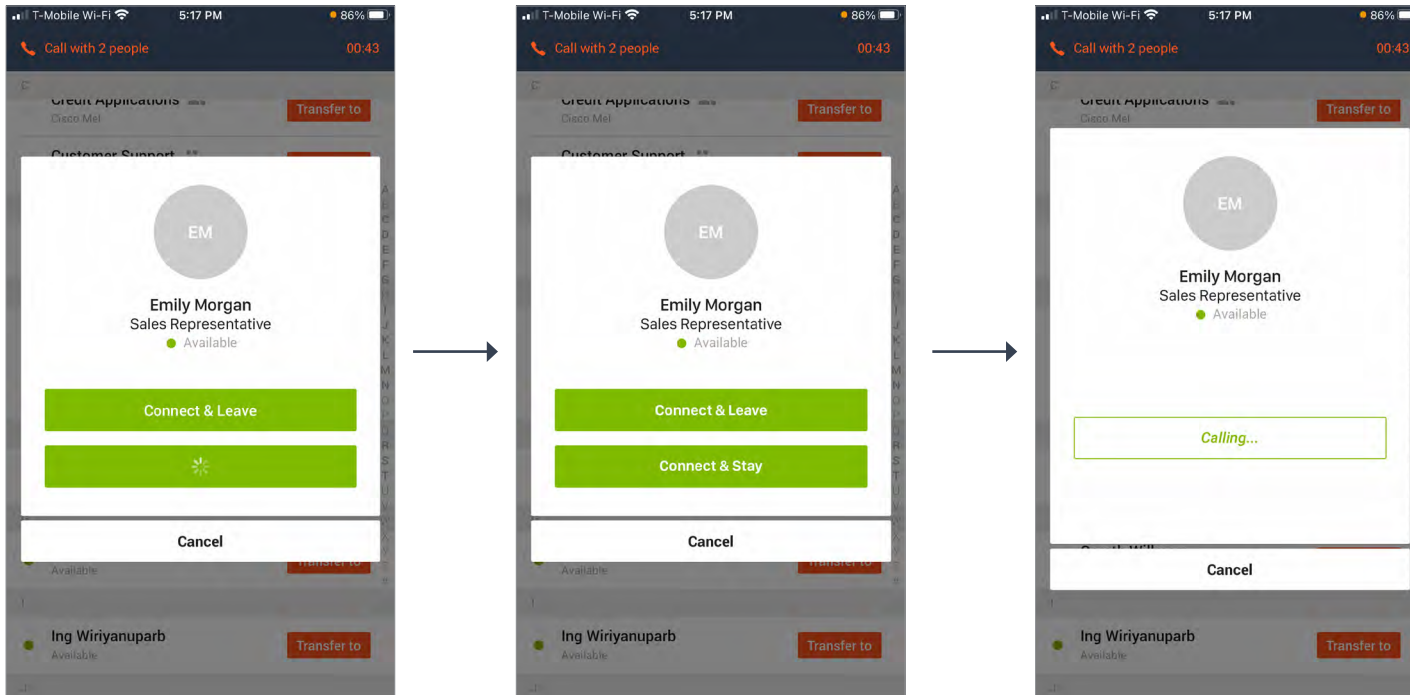
4. When you are ready to take the caller off hold, tap Connect & Leave to connect the caller to your colleague and leave the call.

5. Or, tap Connect & Stay to take caller off hold and have a 3-way conference call with the original caller and your colleague.

Calls and messaging

Start a conference call

Starting a conference call is easy and can be done from any directory:
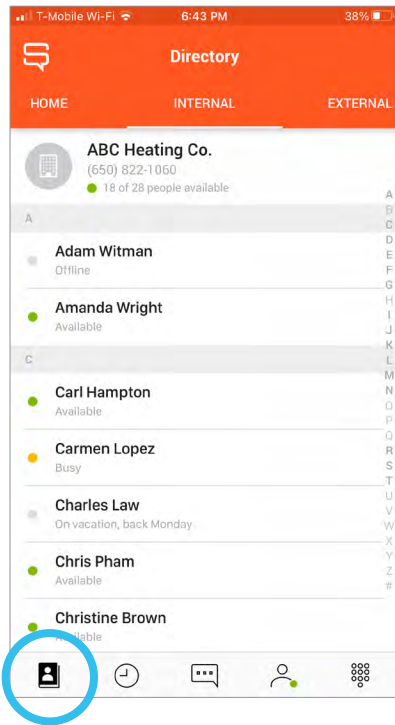
1. Open the Spoke Phone app and tap Directory icon located at bottom of screen.
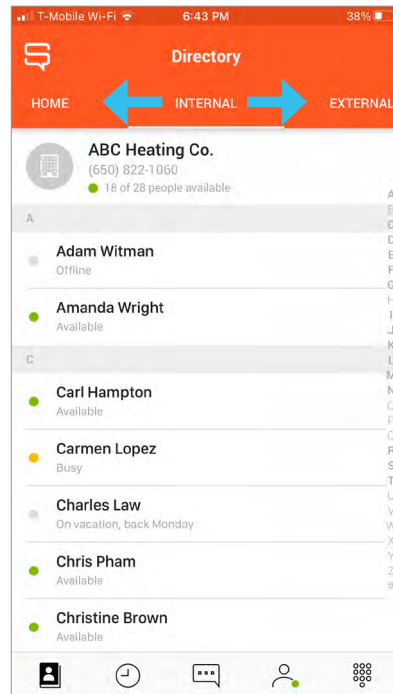
2. Use the the sliding bar at the top to navigate to the relevant tab (internal, Personal, or External)
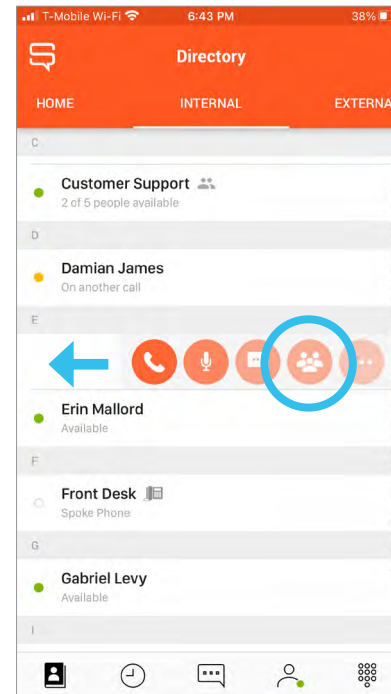
3. Search for the initial contact (or group) and swipe left to access the action keys. And tap the conference call button to start the call.
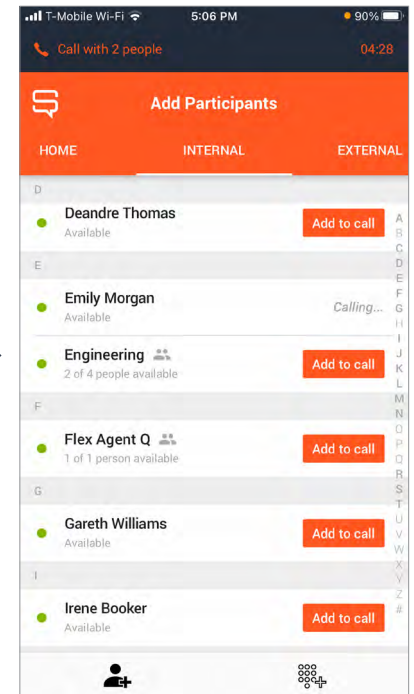
4. Next, add other parties by tapping add to call. This will dial in those contacts with no disruption to the ongoing call.

Calls and messaging

Turn an ongoing call into a conference call

Follow the steps below to turn any on-going call into a conference call.
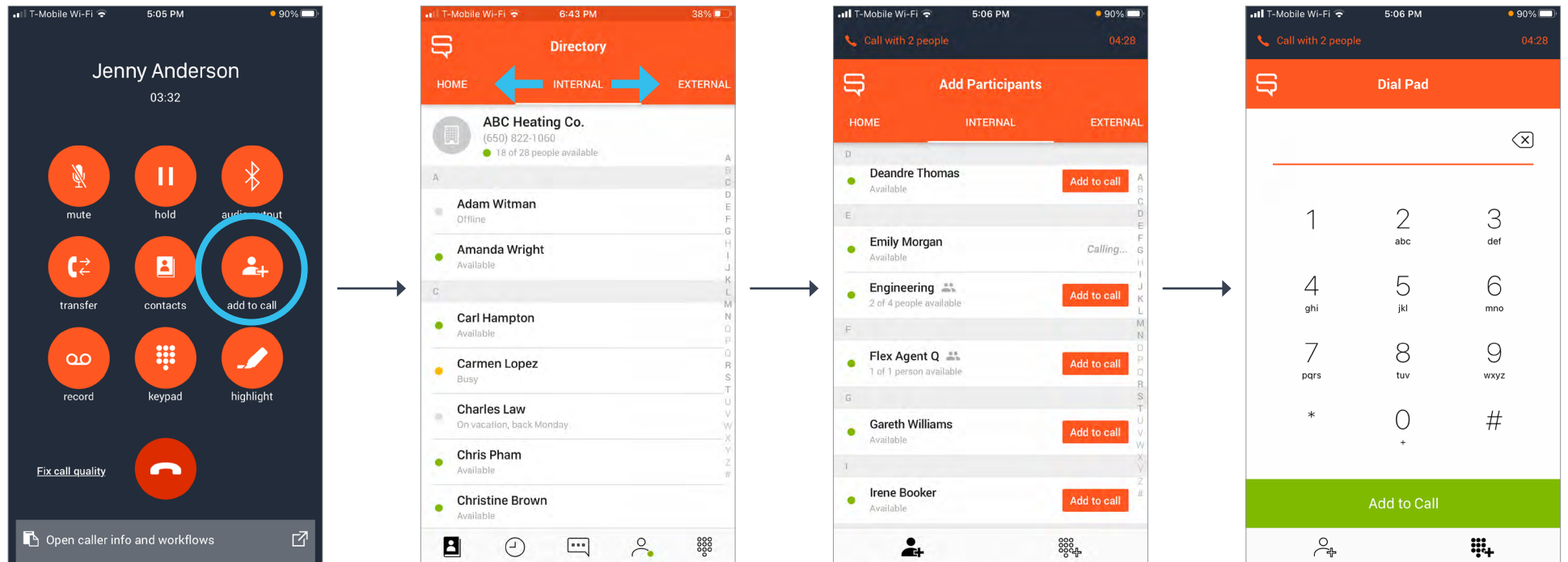
1. Open the Spoke Phone app. If your phone is locked, unlock the screen, and tap on the Add to Call button.

2. Contacts can be added from any of your directories.

3. Scroll to find the contact you want to add, then tap Add to Call. Ringing will start immediately and call will connect when answered.

4. If you need to add a contact who is not in your directory, tap the keypad + icon, then dial any number and tap Add to Call button.

Calls and messaging

Create custom conference groups

When you call a custom conference group Spoke Phone will automatically dial and conference everyone in the group. Follow the steps to create a custom conference group for your regular meetings, project calls etc.
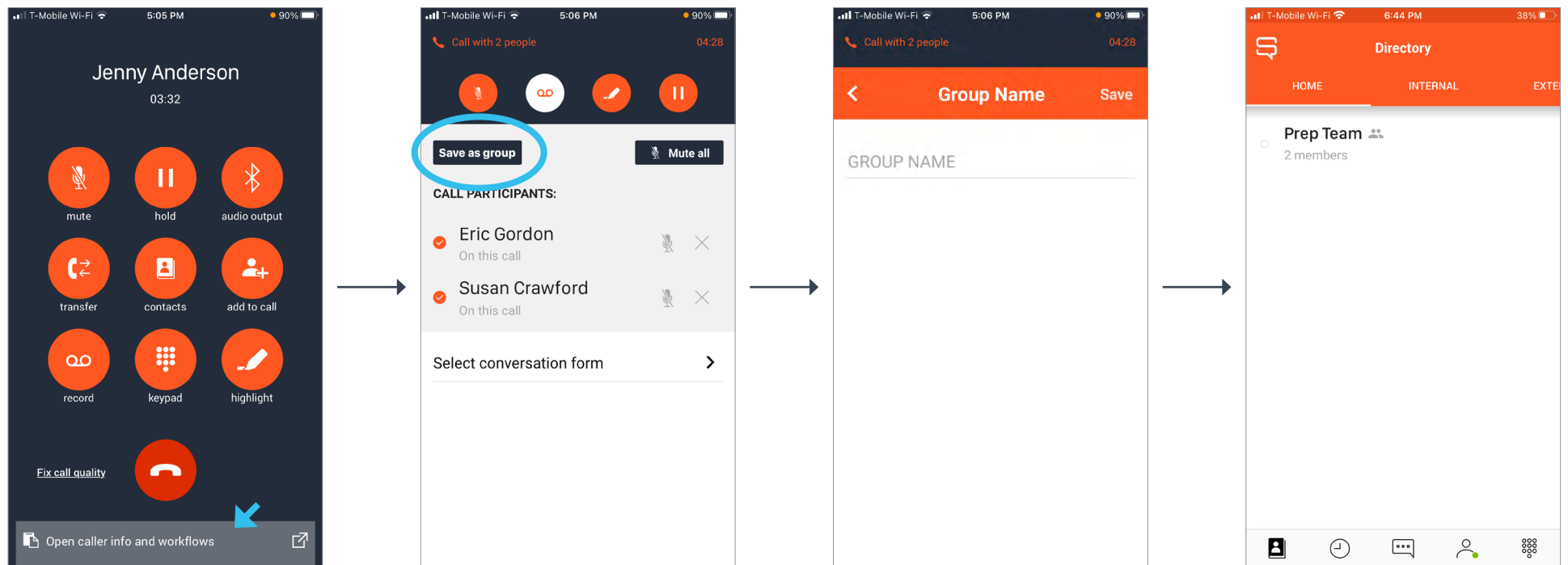
1. On a call tap 'Open caller info and workflows'

2. Select 'Save as group' button at top left

3. Name the Group and click Save.

4. Conference group contact will save to your Home Directory.

Calls and messaging

How to send a chat message to your internal contacts

Spoke Phone's Team Chat provides internal chat service for your entire team.
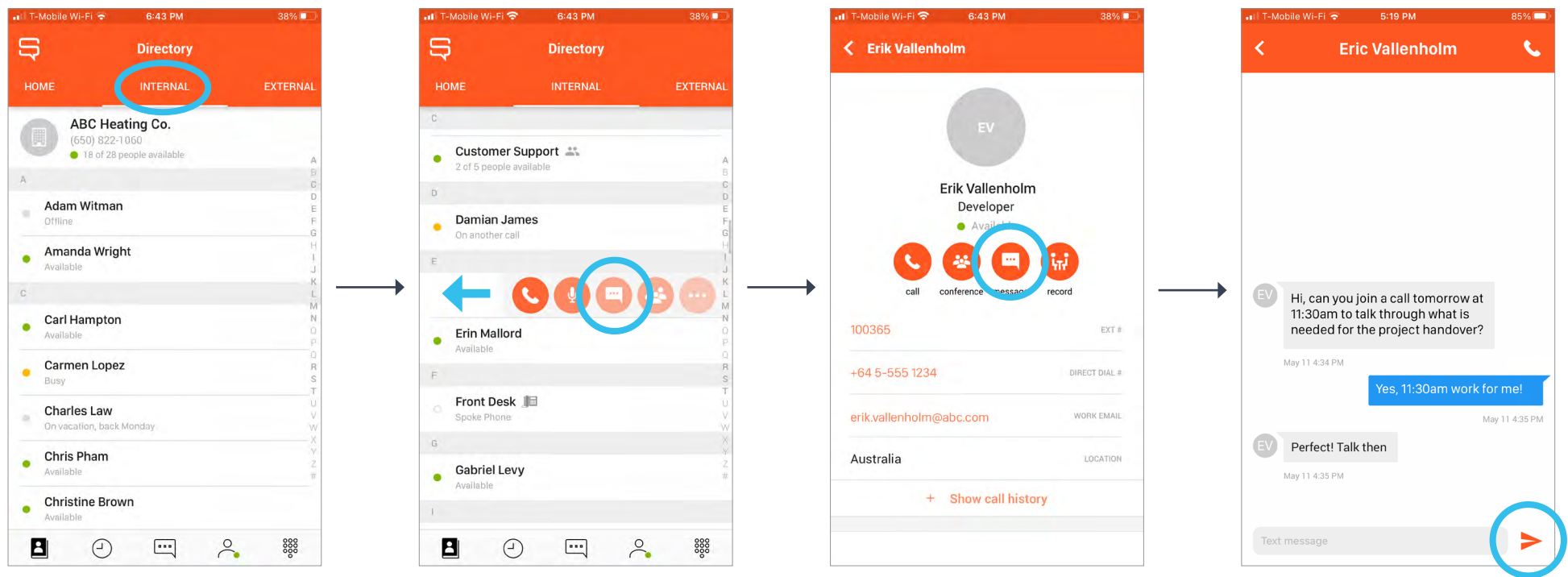
1. Open your Spoke Phone app and go to the Internal directory.

2. Slide left to activate the menu and tap the message icon.

3. Or, tap on the teammate name to open their profile, then tap the message icon.

4. Type a message, when finished typing press the send arrow.

Calls and messaging

Record in-person meetings

Spoke Phone's face-to-face meeting feature records and stores conversations that occur across a table when you're sitting with your customer.
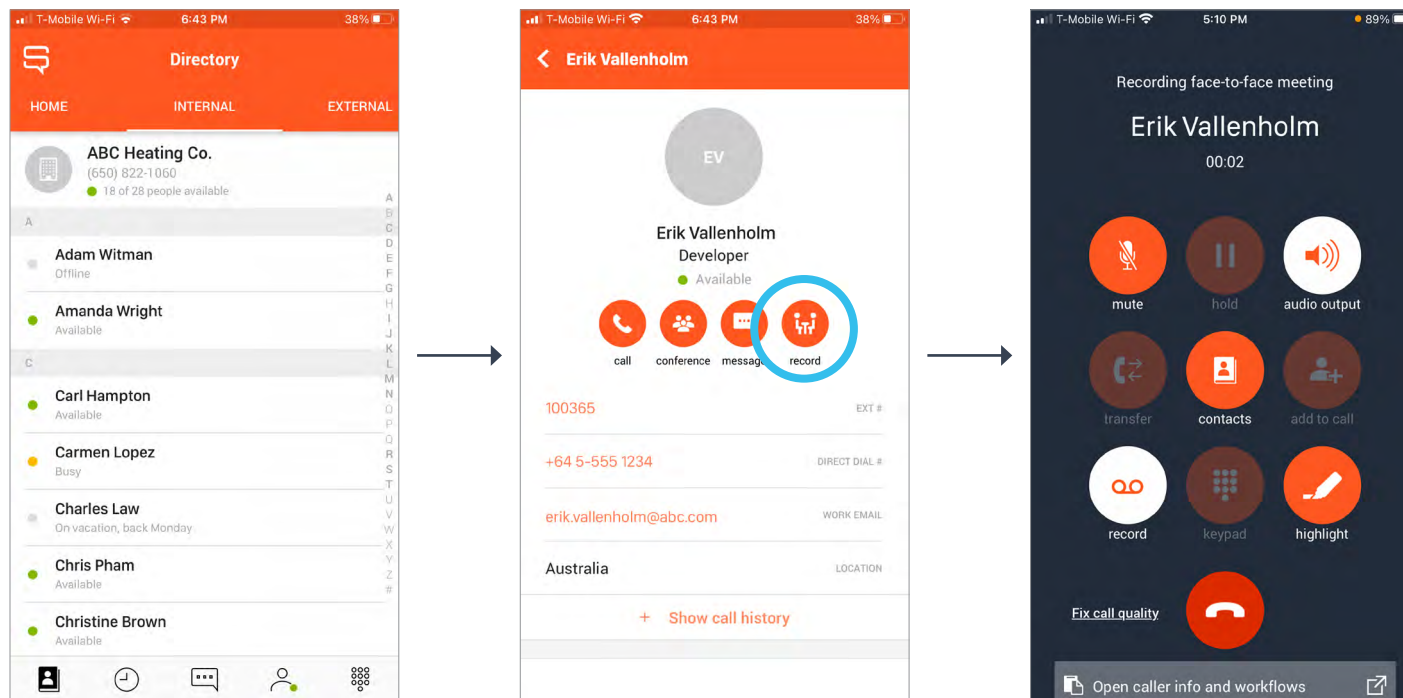
Note: Face-to-face recordings are exactly like phone calls in that they create a call history, you can complete mobile forms during the meeting, and all of the call data can be sent into CRMs and other applications.

1. Find the contact in the External or Internal directory, and tap to open contact card.

2. Tap on face-to-face recording icon.

3. The normal on-call phone screen will open to record the meeting. When done, hang up to end the recording.

Calls and messaging

How to send/receive SMS messages on your Spoke Phone

Spoke Phone's Business SMS allows Spoke Phone users to send and receive business SMS messages using their Spoke Phone number, keeping personal and business SMS messages separated.

Note: SMS is restricted to 1:1 conversations between a Spoke Phone user and an external party. Users are unable to group SMS.

If you do not have SMS enabled on your profile yet, you will see a message and you will need to contact your company administrator, requesting that SMS be added.
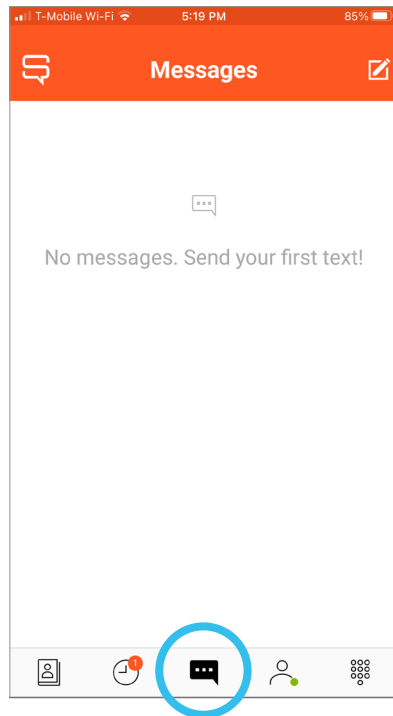
1. Open your Spoke Phone app and tap the Message icon on the bottom menu bar.
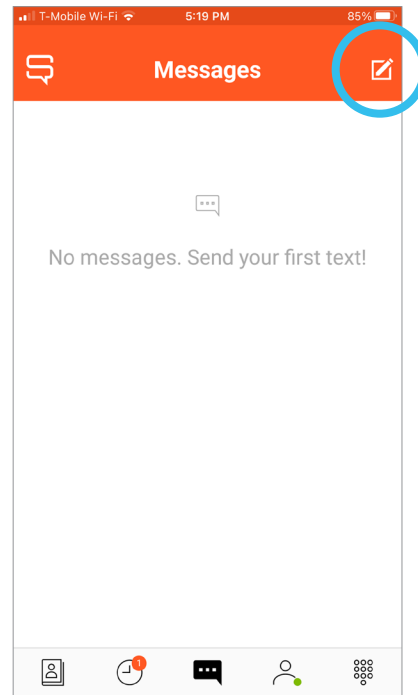
4. Tap on the new message icon at the top right.
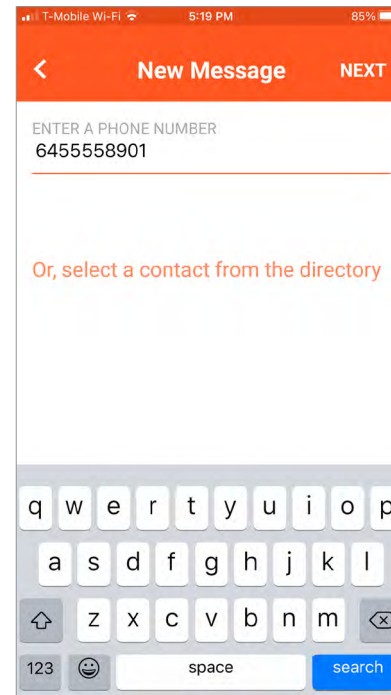
3. Enter a mobile phone number or select a contact from your directory.
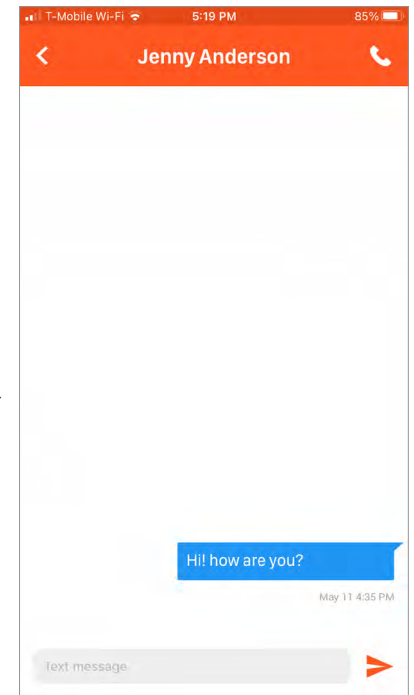
4. Type a message and when finished press the send arrow.

Your call activity

Call history

Voicemail

Team voicemail

Mobile forms

Your call activity

Call history

Call history contains a record of all outbound calls you have made, all calls you have answered, as well as shared and direct calls that you have missed.

The most important thing to understand about using your Call History is the difference between missed team calls (calls to a call group) and missed, direct calls (calls that are only for you).
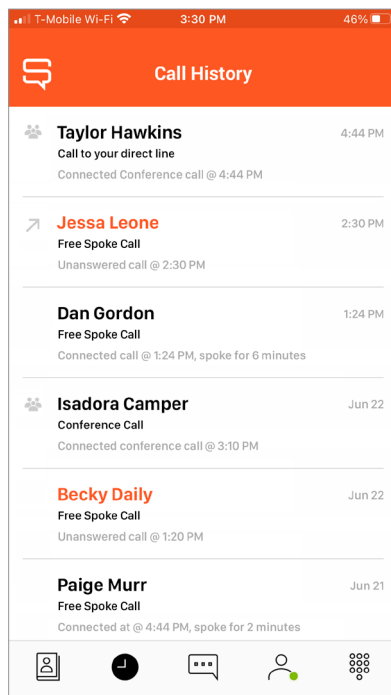
Direct calls

Direct calls are any calls made directly to you (not offered to anyone else). This includes the following call types:

- Calls to a DDI / DID (any phone number assigned to your user)
- Calls to your extension number
- Direct calls from another Spoke Phone user in your organization
- Calls that have been answered by a colleague and manually transferred to you

Your Call History will show you any direct calls that you have answered, or missed. Direct, missed calls will not appear on anyone else's call history.

Your call activity

How to access voicemail messages
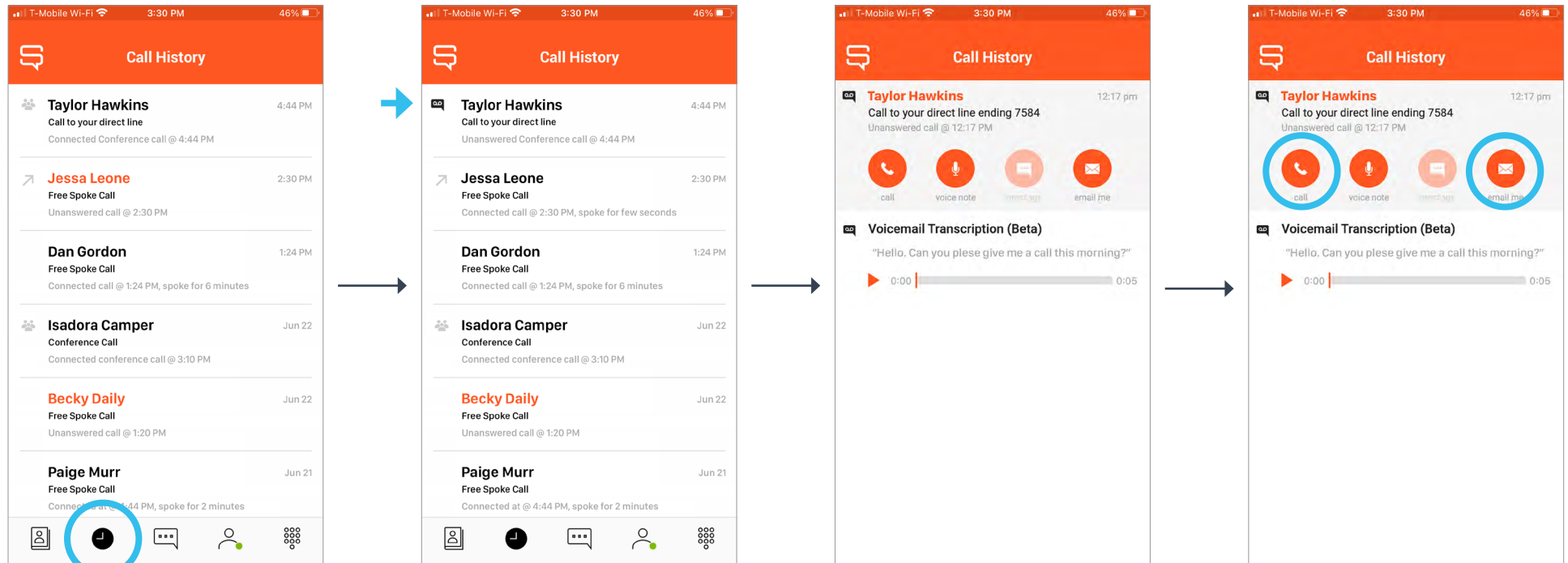
1. Open the Spoke Phone app. Tap on the clock icon to open your Call History.

2. If you or any of your (call) groups miss a call, and the caller leaves a voicemail, you will see a Voicemail bubble icon next to that call record.

3. To access that voicemail, tap on the call record. You will see the transcription for the voicemail, and the option to play it back.

4. On the same screen, you can tap the call button to call back the caller. Or, send a copy of the voicemail message to your email by tapping email me.

Your call activity

Team voicemail

When you are a part of a group contact and someone leaves a voicemail to that group contact (i.e. sales team), everyone in that group contact will receive the voicemail.

1. Every team member that belongs to the group contact will receive the voicemail.

2. When the call is returned by a team member, everyone on that team can see who and when the call was returned.

Your call activity

Mobile Forms

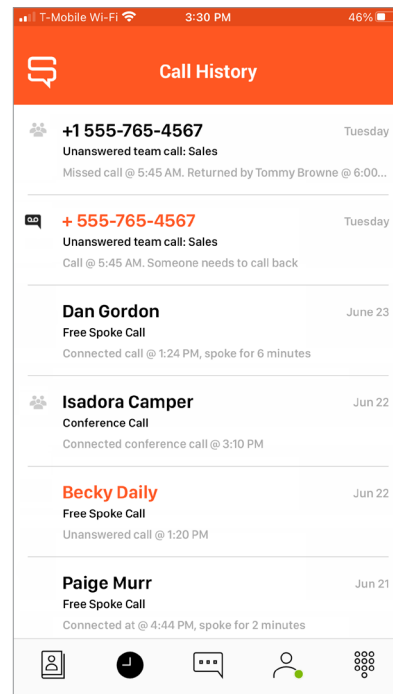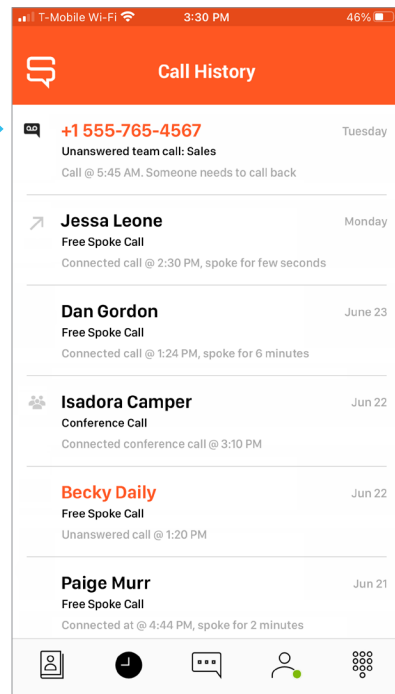Your Administrator can create mobile forms within Spoke Phone to present the Spoke Phone user with a mobile-first form to collect data during an active phone call.

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
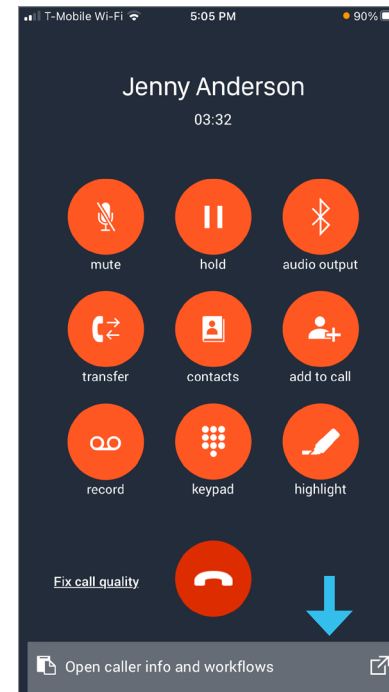
1. Tap 'Open caller info and workflows' at bottom of the screen during a live call.
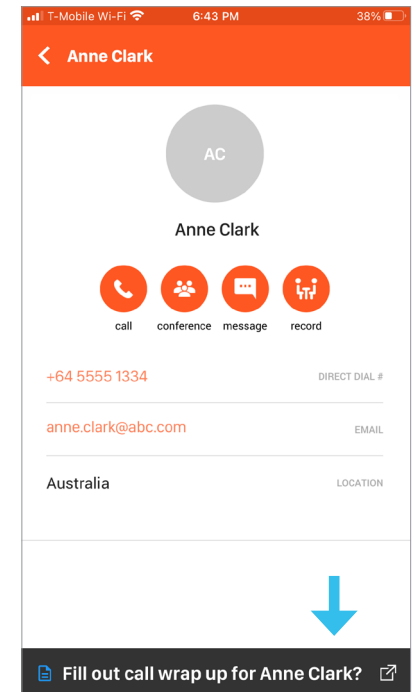
2. Or tap on 'Fill out call wrap for (contact name)?' prompt at bottom of screen after call ends.

Your call activity
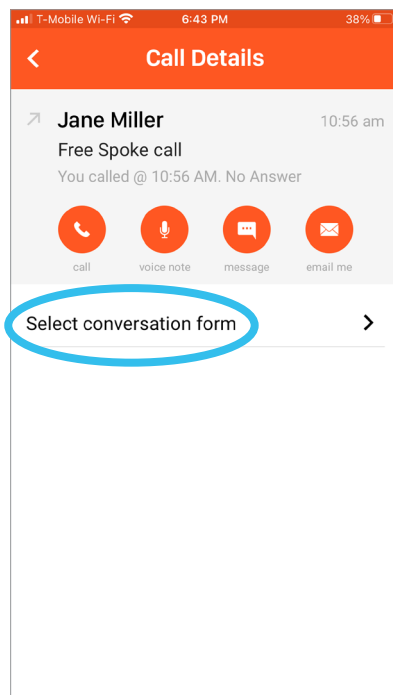
Mobile Forms

3. Underneath the action button, tap Select conversation form.

4. Tap the mobile form name you want to use.
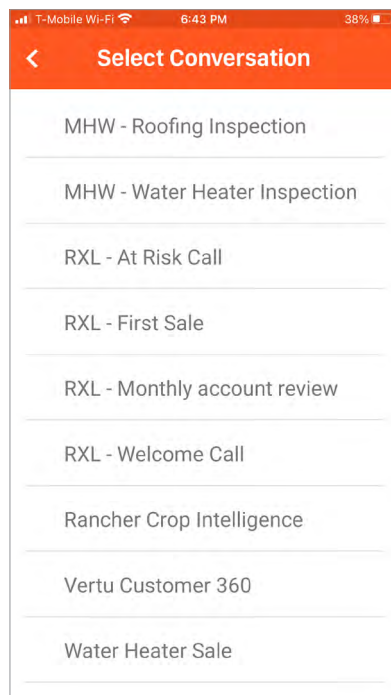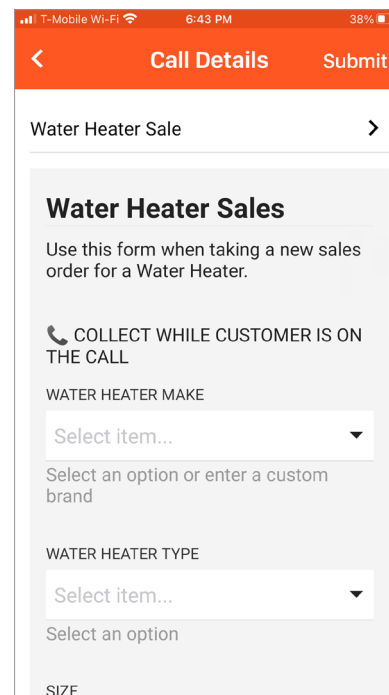
5. Here is a good example of Mobile forms. Learn more about Mobile forms.

Troubleshooting

Call quality

Network connectivity test
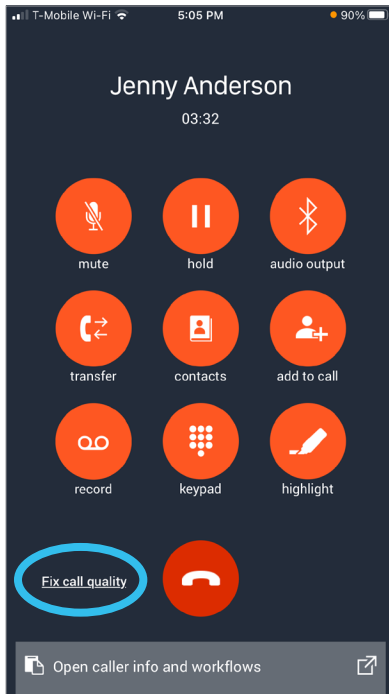
Twilio Edge Location

More help

Troubleshooting

How to improve call quality during a live call

An unstable internet connection can affect your call quality. If this happens while you are on a call, we recommend improving your call quality by downgrading from HD mode to Carrier Calling mode. To do this on a live call, follow the steps below:

1. Open your Spoke Phone app to access the in-call options. If phone is locked, unlock the screen.

2. Tap on the Fix call quality link to switch the call to Carrier calling mode.

3. The caller will hear a message asking them to hold while we fix call quality.

Note: Fix call quality button is not available on desktop.
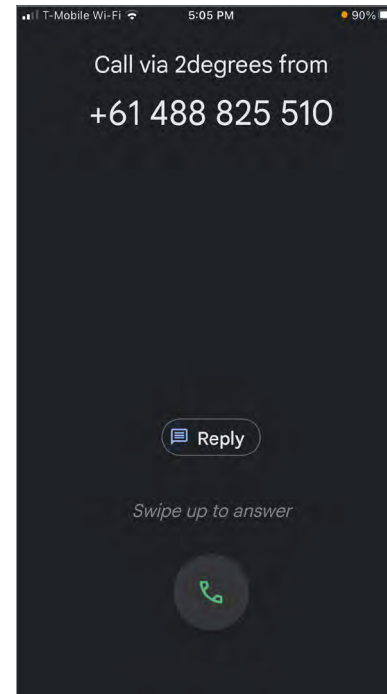
4. You will receive an incoming call to your personal mobile. This call will show as coming from your company number.

5. Simply answer this incoming call and you will be reconnected with the original caller.

6. Your call is now being made over the normal phone line and is no longer reliant on good WiFi or celluar/mobile data signal.

7. When you make or answer your next call on Spoke, it will automatically be back in HD (VoIP) Calling mode.

Troubleshooting

Call quality issues on desktop application

The Spoke Phone desktop application provides a premium quality of calling for Spoke users. However, Spoke Phone's call quality is a product of the network environment and computer operating system.

WiFi requirements

If you are using Spoke Phone with Fibre or NBN, with fast internet speeds you should have reasonably good quality calls, most of the time. In order to test this, you can use the following test to measure the quality of your network:

- [Run this DSL speed test](#), the same 2 times a day for one week.

To determine a quality network, you'll need the following results:

- Overall: Minimum of an A result required
- Bufferbloat: Minimum of an A result required
- Quality: Minimum of an A result required

To get excellent call quality on all your calls, and prevent missed calls - we recommend you enlist the help of a local IT professional and get your WiFi and router configured to meet Spoke Phone's WiFi requirements for good call quality.

Other potential issues

99% of the call quality issues our customer's experience are caused by their own WiFi network. These call quality issues are typically resolved when the WiFi network has been configured and set up according to Spoke Phone's WiFi requirements.
If you have ruled out your network as a cause of poor call quality issues, we recommend checking the list of other potential causes in the table below.

Potential causes	How to test/resolve
Bluetooth/wired headsets	We recommend a number of wired headsets for Spoke Phone. Bluetooth headsets are known to produce call latency issues and are not recommended.
SDK voice region	• Open the Spoke Phone app and tap the person icon. • Go to Settings > My call quality > Select closest voice region. • Ensure it is set to the geographically closest region. • Alternatively, you can try setting it to Global. This will use some routing trickery to determine the closest region, however about 1-2% of the time this is not reliable.
Forwarded calls	If any of your company phone numbers are still with another provider and are being forwarded to Spoke Phone, this will cause call quality issues. Test by having a colleague call you several times on the number that is being forwarded, note any call quality symptoms. Then have the colleague call you on any of your Spoke Phone numbers, or simply make a call out from Spoke Phone, note any call quality symptoms. We recommend porting your numbers or setting up a network-level diversion to resolve.
Out of date app version	Ensure you have the latest Spoke Phone application downloaded.

Troubleshooting

How to Run the Network Connectivity Test

This article discusses how to run the network connectivity test. This is web-based and currently only available on desktop for Mac and Windows.
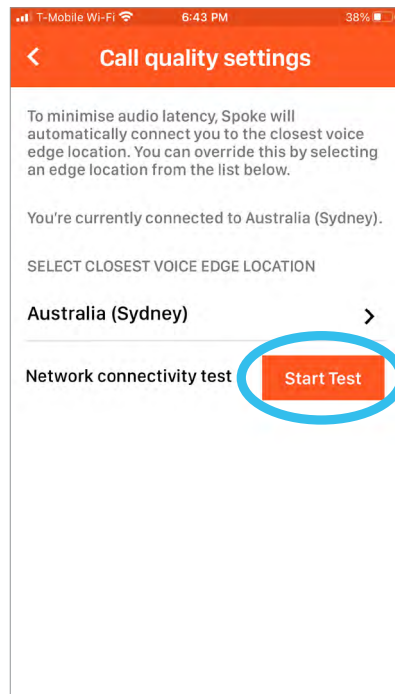
Step 1
Tap the person icon at the bottom of the app, then tap 'Settings'.

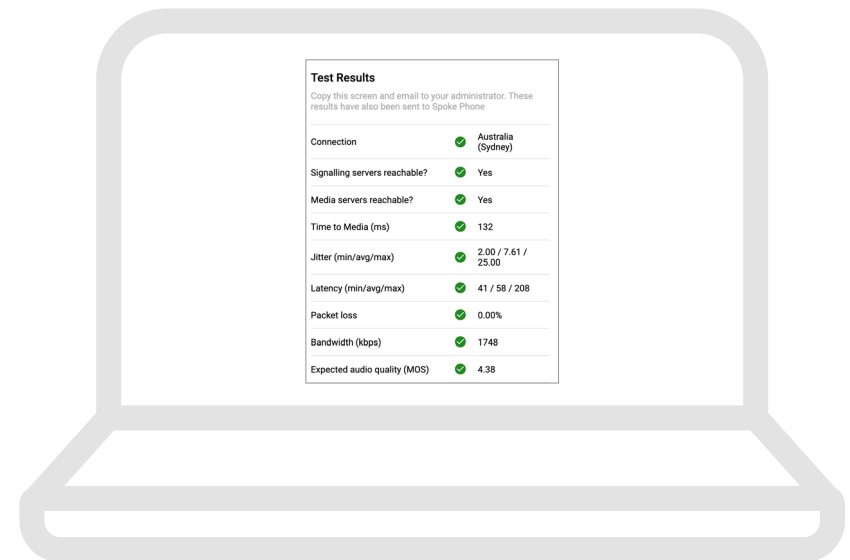**Step 2**
Tap My Call Quality.

Step 3
Tap Start Test button.

Note:
• Stay on the page while the test runs. This should take about 40-45 seconds.
• A copy of the results is sent to Spoke Phone.

Test Results

All tests need to show a green tick. If you have any red X marks, you will suffer from poor call quality and your IT department needs to get these resolved.

Troubleshooting

Set Twilio Edge Location for Spoke desktop app

Twilio Edge location improves call latency in the Spoke desktop app. Follow the steps to set up Twilio Edge Location on for Mac and Windows.
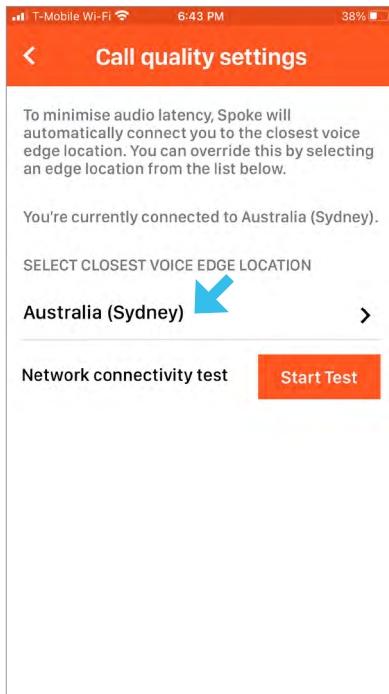
Step 1

Tap the person icon at the bottom of the app, then tap 'Settings'.

Step 2

Tap My Call Quality.

Step 3

Click 'Select close voice edge location' field and select closest region.

Troubleshooting

Need further help?

Visit our support portal at:

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

From the support portal you can also submit a request by tapping on "Submit Ticket' to access ticket submit form at:

https://support.spokephone.com/hc/en-us/requests/new

Or contact Spoke directly:

AU: (02) 8776-3322
NZ: (09) 888 0680
UK: (20) 3322 1971
USA: (650) 822 1060

THANK YOU

SPOKE PHONE