

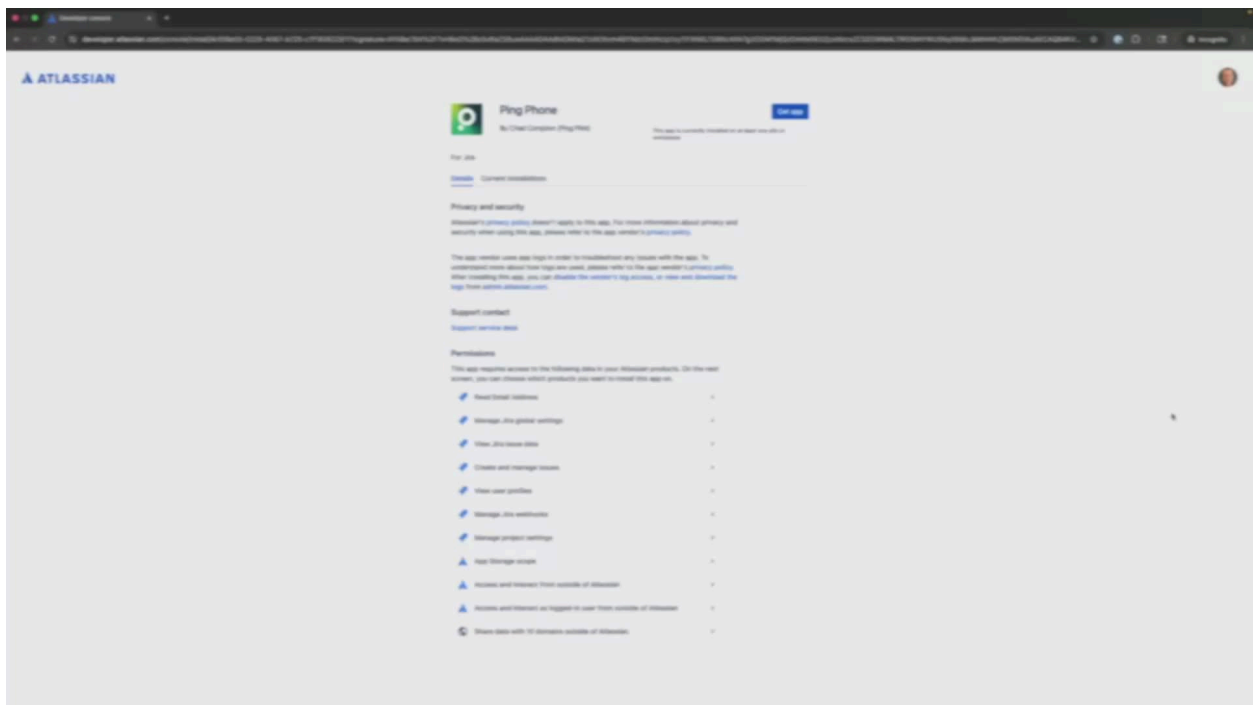
Setting Up and Using Ping Phone in Jira

Objective

This SOP outlines the steps to install and configure the Ping Phone app in Jira, ensuring effective communication and ticket management.

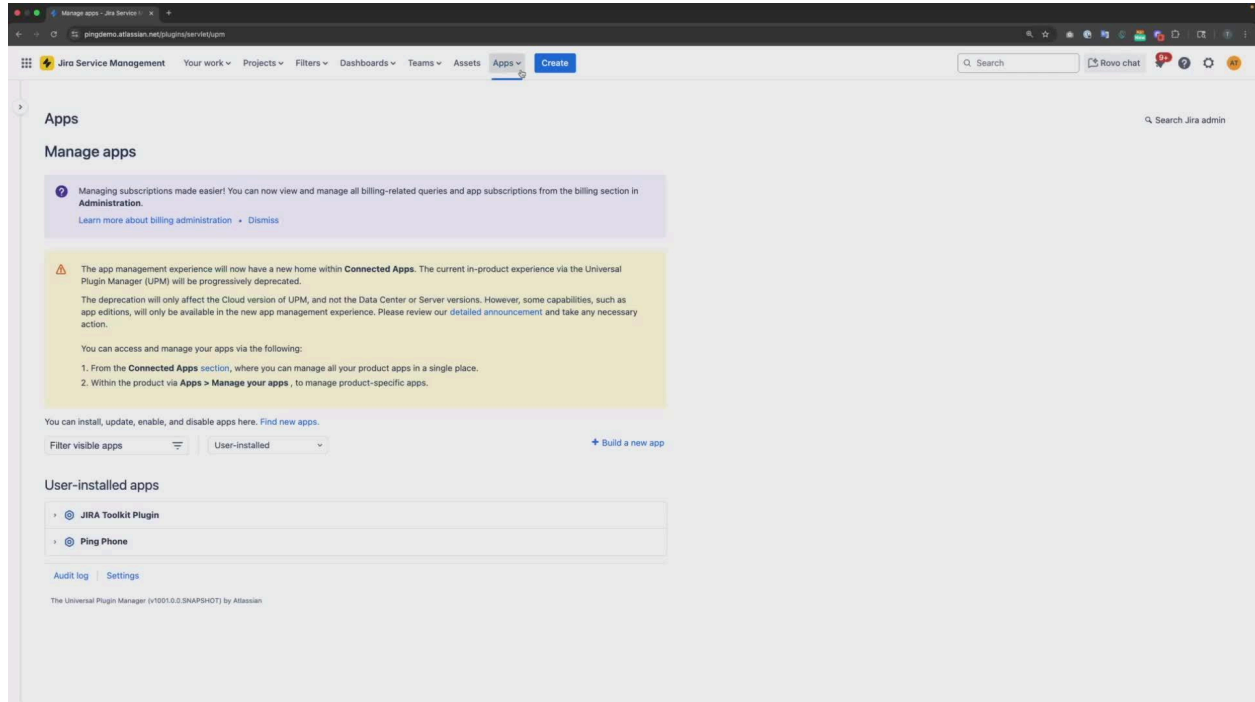
Key Steps

1. Install the Ping Phone App 0:04



- Install the Ping Phone app in the desired workspace.
- A pop-up will appear; choose 'Manage App' to access configuration options.

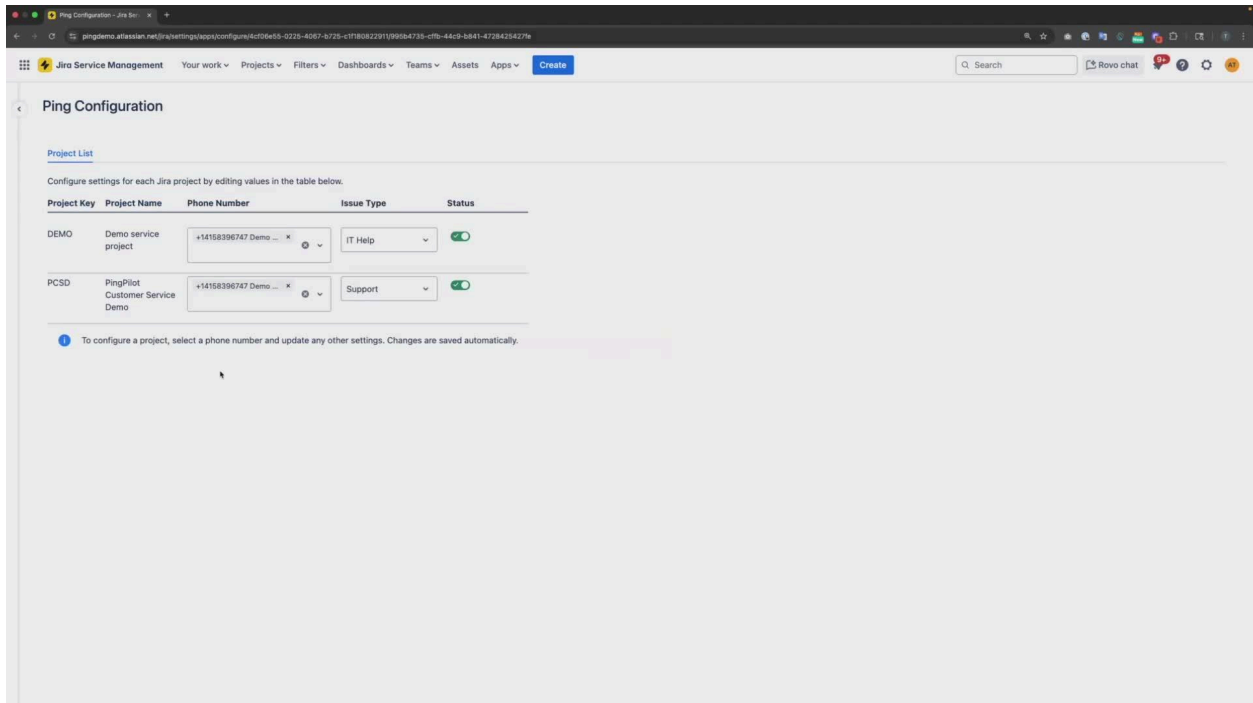
2. App Management 0:31



- Navigate to 'Apps' in the menu.
- Select 'Manage Your Apps' to find the Ping Phone app.

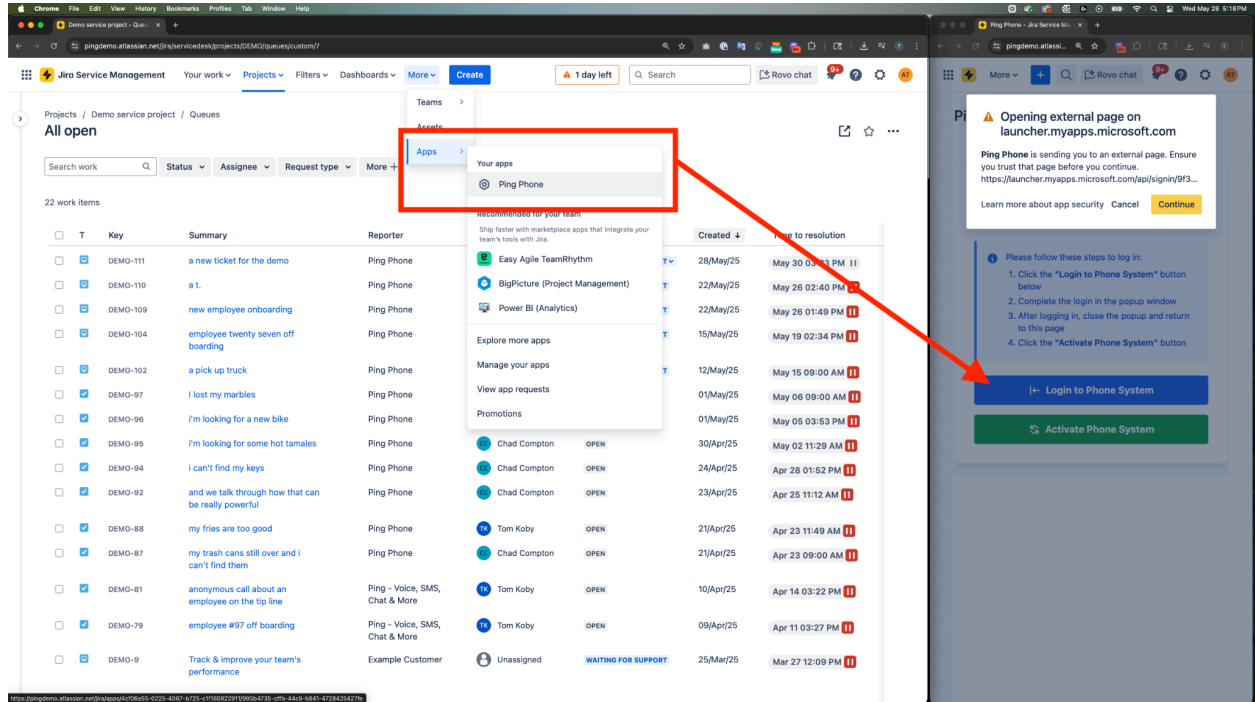
3. Assign Phone Numbers to Projects 0:40

- Coordinate with your admin team to assign a phone number to your Jira instance.



- Map phone numbers to projects:
 - One phone number to one project.
 - One phone number to multiple projects.
 - Multiple phone numbers to multiple projects.
- (Optional) Configure IVR for a single phone number to route calls to different projects based on user input. (Contact us to activate and configure IVR feature)

4. Start Ping Phone with SSO or credentials 1:19



- Launch the Ping Phone app by Selecting Apps > Ping Phone and right mouse click to open in a new window like in the image. This will give you a soft phone that can always be visible and answer calls with Ticket “pop” for the related ticket and ticket history.
- You can log in with Single Sign-On (SSO with Microsoft Entra / AD and Google) or credentials.
- You can use this soft phone and access the callers tickets even if you don't have Jira open in another window or tab.

5. Make a Test Call 2:10

The screenshot displays the Jira Service Management interface. The main panel shows a list of 21 work items under the 'All open' filter. The table includes columns for Key, Summary, Reporter, Assignee, Status, Created, and Time to resolution. The right sidebar, titled 'Ping Phone', shows the agent status as 'Agent (tomkoby@scorchagency.com)' with 'Available' and 'Offline' buttons. It also features a 'Call' button, a 'Show Dial Pad' button, and a 'Source Phone Number' field set to '+14158396747'. A 'Logout' button is at the bottom of the sidebar.

Key	Summary	Reporter	Assignee	Status	Created	Time to resolution
DEMO-110	a l.	Ping Phone	Chad Compton	WAITING FOR SUPPORT	22/May/25	May 26 02:40 PM
DEMO-109	new employee onboarding	Ping Phone	Agent Tom	WAITING FOR SUPPORT	22/May/25	May 26 01:49 PM
DEMO-104	employee twenty seven off boarding	Ping Phone	Agent Tom	WAITING FOR SUPPORT	15/May/25	May 19 02:34 PM
DEMO-102	a pick up truck	Ping Phone	Unassigned	WAITING FOR SUPPORT	12/May/25	May 15 09:00 AM
DEMO-97	I lost my marbles	Ping Phone	Agent Tom	OPEN	01/May/25	May 06 09:00 AM
DEMO-96	I'm looking for a new bike	Ping Phone	Chad Compton	OPEN	01/May/25	May 05 03:53 PM
DEMO-95	I'm looking for some hot tamales	Ping Phone	Chad Compton	OPEN	30/Apr/25	May 02 11:29 AM
DEMO-94	i can't find my keys	Ping Phone	Chad Compton	OPEN	24/Apr/25	Apr 28 01:52 PM
DEMO-92	and we talk through how that can be really powerful	Ping Phone	Chad Compton	OPEN	23/Apr/25	Apr 26 11:12 AM
DEMO-88	my fries are too good	Ping Phone	Tom Koby	OPEN	21/Apr/25	Apr 23 11:49 AM
DEMO-87	my trash cans still over and i can't find them	Ping Phone	Chad Compton	OPEN	21/Apr/25	Apr 23 09:00 AM
DEMO-81	anonymous call about an employee on the tip line	Ping - Voice, SMS, Chat & More	Tom Koby	OPEN	10/Apr/25	Apr 14 03:22 PM
DEMO-79	employee #97 off boarding	Ping - Voice, SMS, Chat & More	Tom Koby	OPEN	09/Apr/25	Apr 11 03:27 PM
DEMO-9	Track & improve your team's performance	Example Customer	Unassigned	WAITING FOR SUPPORT	25/Mar/25	Mar 27 12:09 PM
DEMO-8	Help! This is a high priority request	Example Customer	Unassigned	WAITING FOR SUPPORT	25/Mar/25	Mar 25 04:09 PM

- Call the assigned phone number to test the setup.

6. Ticket Creation and Assignment 2:20

The screenshot displays the Jira Service Management interface. The main panel shows a list of 21 work items (tickets) under the 'All open' filter. The table columns are: Key, Summary, Reporter, Assignee, Status, Created, and Time to resolution. The tickets are sorted by creation date, with the most recent at the top.

Key	Summary	Reporter	Assignee	Status	Created	Time to resolution
DEMO-110	a L	Ping Phone	Chad Compton	WAITING FOR SUPPORT	22/May/25	May 28 02:40 PM
DEMO-109	new employee onboarding	Ping Phone	Agent Tom	WAITING FOR SUPPORT	22/May/25	May 28 01:49 PM
DEMO-104	employee twenty seven off boarding	Ping Phone	Agent Tom	WAITING FOR SUPPORT	15/May/25	May 19 02:34 PM
DEMO-102	a pick up truck	Ping Phone	Unassigned	WAITING FOR SUPPORT	12/May/25	May 15 09:00 AM
DEMO-97	I lost my marbles	Ping Phone	Agent Tom	OPEN	01/May/25	May 06 09:00 AM
DEMO-96	I'm looking for a new bike	Ping Phone	Chad Compton	OPEN	01/May/25	May 05 03:53 PM
DEMO-95	I'm looking for some hot tamales	Ping Phone	Chad Compton	OPEN	30/Apr/25	May 02 11:29 AM
DEMO-94	I can't find my keys	Ping Phone	Chad Compton	OPEN	24/Apr/25	Apr 28 01:52 PM
DEMO-92	and we talk through how that can be really powerful	Ping Phone	Chad Compton	OPEN	23/Apr/25	Apr 25 11:12 AM
DEMO-88	my fries are too good	Ping Phone	Tom Koby	OPEN	21/Apr/25	Apr 23 11:49 AM
DEMO-87	my trash cans still over and I can't find them	Ping Phone	Chad Compton	OPEN	21/Apr/25	Apr 23 09:00 AM
DEMO-81	anonymous call about an employee on the tip line	Ping - Voice, SMS, Chat & More	Tom Koby	OPEN	10/Apr/25	Apr 14 03:22 PM
DEMO-79	employee #97 off boarding	Ping - Voice, SMS, Chat & More	Tom Koby	OPEN	09/Apr/25	Apr 11 03:27 PM
DEMO-9	Track & improve your team's performance	Example Customer	Unassigned	WAITING FOR SUPPORT	25/Mar/25	Mar 27 12:09 PM
DEMO-8	Help! This is a high priority request	Example Customer	Unassigned	WAITING FOR SUPPORT	25/Mar/25	Mar 25 04:08 PM

The right sidebar shows the 'Ping Phone' interface. It displays the agent status as 'Agent (tomkoby@scorchagency.com)' with 'Available' and 'Offline' buttons. Below this is a phone number input field with a '+[country code][number]' placeholder and a 'Call' button. There is also a 'Show Dial Pad' button and a 'Source Phone Number: +14158396747' field with a 'Change' button. At the bottom is a 'Logout' button.

- Verify that a new ticket is created upon receiving a call.
- If unassigned, use automatic assignment logic to route the call to the appropriate agent.

7. Access Ticket Data 3:45

The screenshot displays the Jira Service Management interface. The left pane shows a list of 22 work items under the 'All open' filter. The right pane shows the detailed view of a specific ticket, 'Ping Phone', which is currently 'Connected'.

Ticket List (Left Pane):

Key	Summary	Reporter	Assignee	Status	Created	Time to resolution
DEMO-111	a new ticket for the demo	Ping Phone	Agent Tom	WAITING FOR SUPPORT	28/May/25	May 30 03:23 PM
DEMO-110	a t.	Ping Phone	Chad Compton	WAITING FOR SUPPORT	22/May/25	May 28 02:40 PM
DEMO-109	new employee onboarding	Ping Phone	Agent Tom	WAITING FOR SUPPORT	22/May/25	May 26 01:49 PM
DEMO-104	employee twenty seven off boarding	Ping Phone	Agent Tom	WAITING FOR SUPPORT	15/May/25	May 19 02:34 PM
DEMO-102	a pick up truck	Ping Phone	Unassigned	WAITING FOR SUPPORT	12/May/25	May 15 09:00 AM
DEMO-97	I lost my marbles	Ping Phone	Agent Tom	OPEN	01/May/25	May 06 09:00 AM
DEMO-96	I'm looking for a new bike	Ping Phone	Chad Compton	OPEN	01/May/25	May 05 03:53 PM
DEMO-95	I'm looking for some hot tamales	Ping Phone	Chad Compton	OPEN	30/Apr/25	May 02 11:29 AM
DEMO-94	I can't find my keys	Ping Phone	Chad Compton	OPEN	24/Apr/25	Apr 26 01:52 PM
DEMO-92	and we talk through how that can be really powerful	Ping Phone	Chad Compton	OPEN	23/Apr/25	Apr 26 11:12 AM
DEMO-88	my fries are too good	Ping Phone	Tom Kobay	OPEN	21/Apr/25	Apr 23 11:49 AM
DEMO-87	my trash cans still over and i can't find them	Ping Phone	Chad Compton	OPEN	21/Apr/25	Apr 23 09:00 AM
DEMO-81	anonymous call about an employee on the tip line	Ping - Voice, SMS, Chat & More	Tom Kobay	OPEN	10/Apr/25	Apr 14 03:22 PM
DEMO-79	employee #97 off boarding	Ping - Voice, SMS, Chat & More	Tom Kobay	OPEN	09/Apr/25	Apr 11 03:37 PM
DEMO-9	Track & improve your team's performance	Example Customer	Unassigned	WAITING FOR SUPPORT	25/Mar/25	Mar 27 12:09 PM
DEMO-8	Help! This is a high priority	Example Customer	Unassigned	WAITING FOR SUPPORT	25/Mar/25	Mar 26 04:08 PM

Ticket Detail View (Right Pane):

Ping Phone
Agent Status: Agent (tomkobay@scorchagency.com)
Available Offline

Call Status: Connected
Duration: 0:20

+ [country code] [number] **Call**

Show Dial Pad

Source Phone Number: +14158396747 **Change**

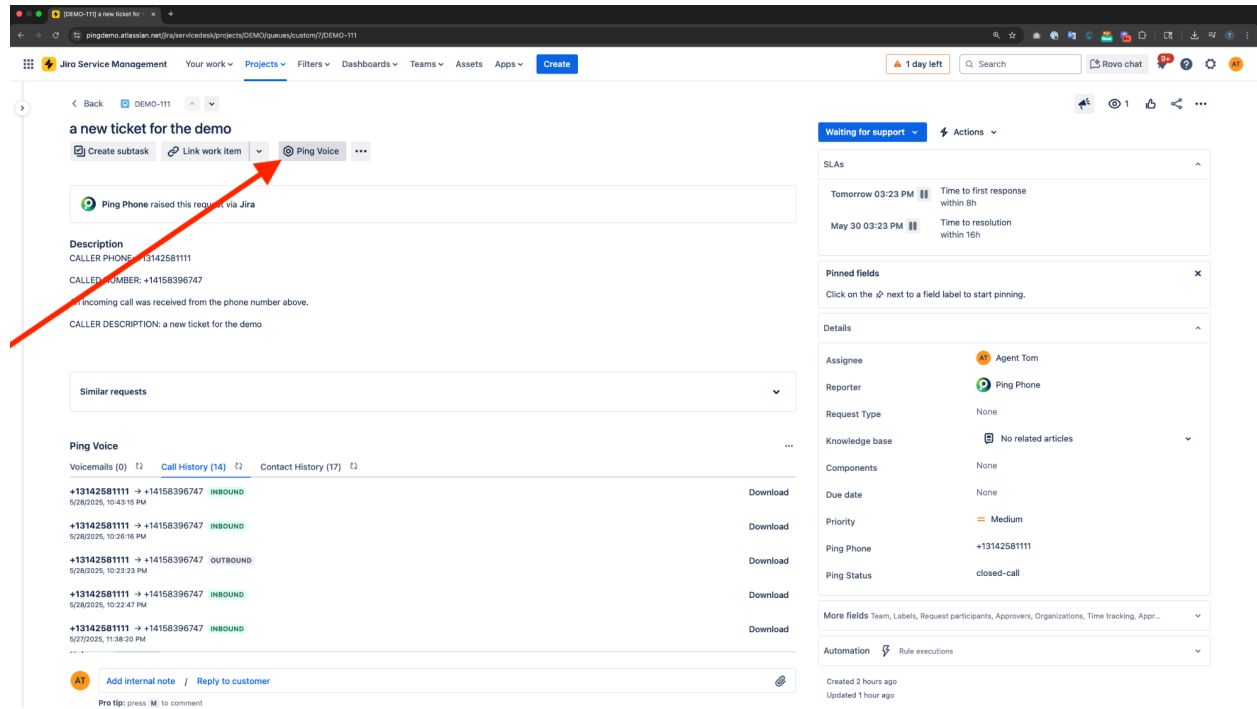
Associated Ticket: [DEMO-111](#)
a new ticket for the demo
Status: Waiting for support

Caller's Ticket History

- DEMO-111**
a new ticket for the demo
Status: Waiting for support
5/28/2025
- PCSD-47**
I'm testing the new voicemail feature
Status: Waiting for support
5/27/2025
- DEMO-109**
new employee onboarding
Status: Waiting for support
5/22/2025
- DEMO-104**
employee twenty seven off boarding
Status: Waiting for support
5/15/2025
- DEMO-97**
I lost my marbles
5/10/2025

- Open the associated ticket to view:
 - Voicemails
 - Call history (inbound and outbound)
 - Call recordings for quality audits.

10. Customer 360, Communication History and Recordings 4:00



The screenshot displays the Jira Service Management interface for a ticket titled "a new ticket for the demo". A red arrow points to the "Ping Voice" button in the top navigation bar. The ticket details include a description, caller information, and a list of similar requests. The right sidebar shows SLAs, pinned fields, and details for the ticket.

Ticket Details:

- Title:** a new ticket for the demo
- Status:** Waiting for support
- Assignee:** Agent Tom
- Reporter:** Ping Phone
- Request Type:** None
- Knowledge base:** No related articles
- Components:** None
- Due date:** None
- Priority:** Medium
- Ping Phone:** +13142581111
- Ping Status:** closed-call

Call History (14):

Phone Number	Direction	Status	Time	Action
+13142581111	→ +14158396747	INBOUND	5/28/2025, 10:43:18 PM	Download
+13142581111	→ +14158396747	INBOUND	5/28/2025, 10:28:16 PM	Download
+13142581111	→ +14158396747	OUTBOUND	5/28/2025, 10:23:23 PM	Download
+13142581111	→ +14158396747	INBOUND	5/28/2025, 10:22:47 PM	Download
+13142581111	→ +14158396747	INBOUND	5/27/2025, 11:38:20 PM	Download

- Utilize the app to access a comprehensive view of all communication related to issues.
- Access Call Recordings
- Access Voicemail
- Access all related tickets to unique phone number

Cautionary Notes

- Ensure that the assigned phone number is active and correctly mapped to avoid missed calls.
- Regularly check the call history and ticket assignments to maintain efficient operations.

Tips for Efficiency

- Use automated assignment logic to streamline ticket handling.
- Regularly review call recordings for quality assurance and training purposes.
- Keep the agent interface open during calls to quickly access ticket information.

Link to Loom

<https://loom.com/share/48f3e913b1894b99943800127a646e52>