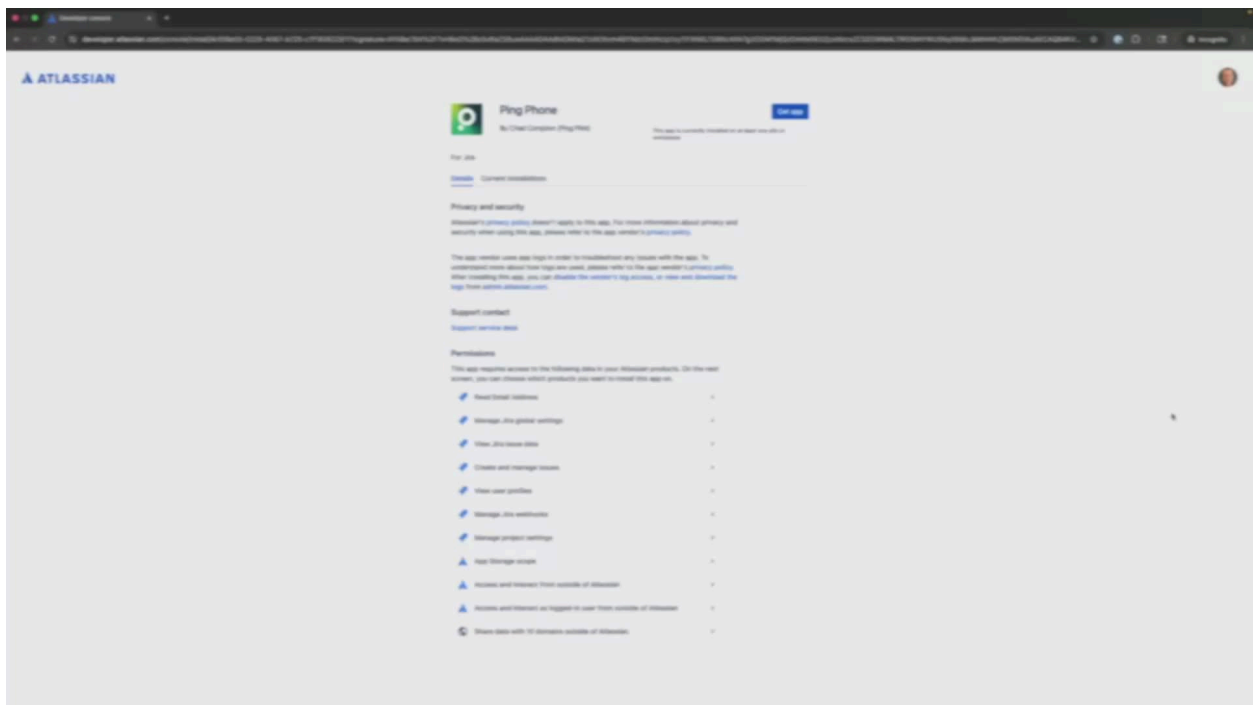# Setting Up and Using Ping Phone in Jira

Objective

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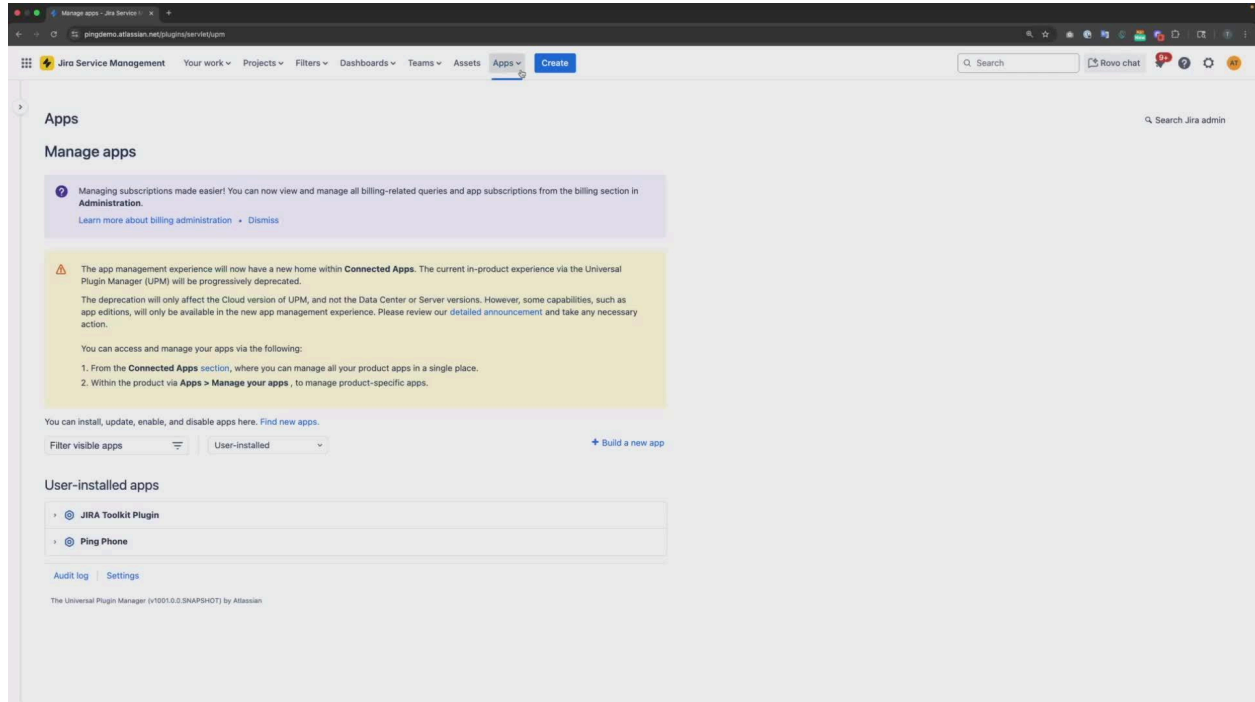
Key Steps

1. Install the Ping Phone App 0:04

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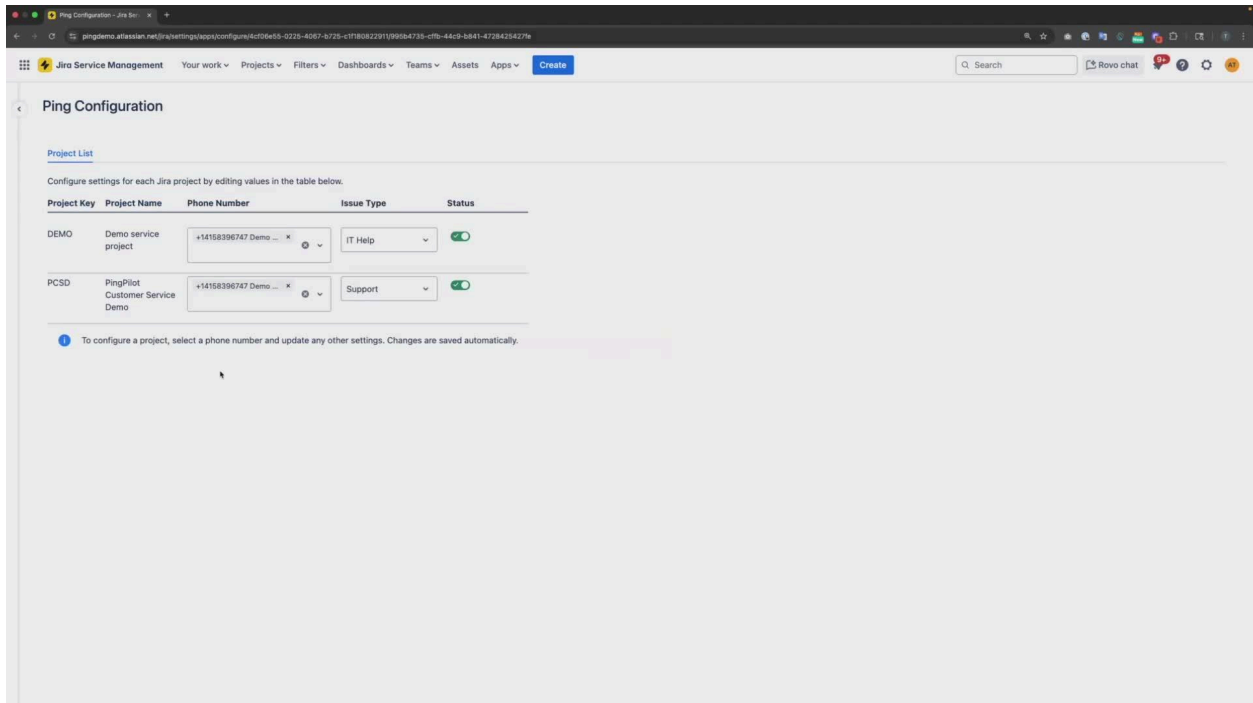- A pop-up will appear; choose 'Manage App' to access configuration options.

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
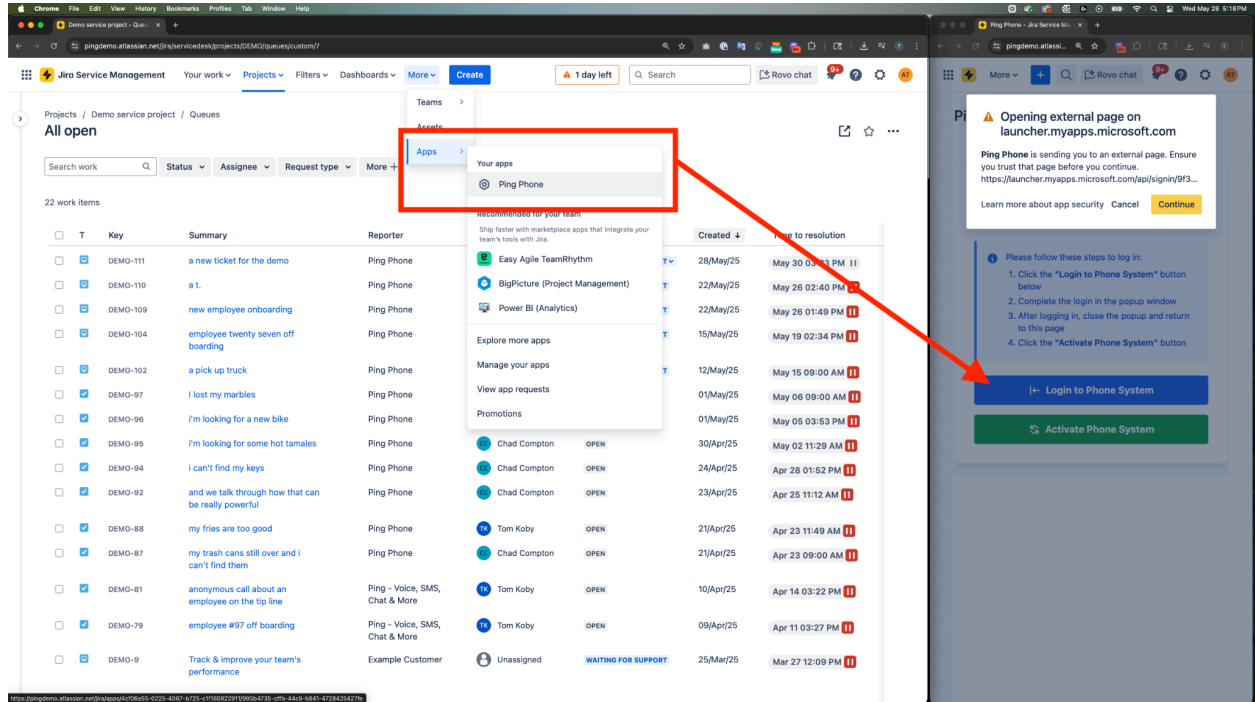
- Launch the Ping Phone app by Selecting Apps > Ping Phone and right mouse click to open in a new window like in the image. This will give you a soft phone that can always be visible and answer calls with Ticket "pop" for the related ticket and ticket history.
- You can log in with Single Sign-On (SSO 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

- Call the assigned phone number to test the setup.

6. Ticket Creation and Assignment 2:20

- 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

- 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

- 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