



Halloo Communications Setup Guide

Level I. Individual Users

Step 1. Log in

How to – Signing in

- Each user extension has their own **My Halloo** site. Enter your CompanyID and user information to access the My Halloo Web site. When you enter you will see your **Summary** page.
- If you are a member of a Hunt Group or Queue, be sure to update your status as “*Accept(ing)*” or “*Available*” (via console for FlexCall agents).
- To set up your voicemail and call forwarding preferences, click on the **User Settings** link on the left side of the page.
- The **User Settings** page allows you to configure your forwarding, voicemail, and notification options.

Notes regarding General User Settings

- User is an administrator** – check this box if this user should have privilege to access the entire account and make plan change requests for the account. Administrators can create extensions, view/hear other extensions’ messages and request plan changes and upgrades.
- Email, Jabber ID, and Mobile Device:** Enter the required addresses in these fields if you intend to activate voicemail notification options (see step 3) later on. Click the (?) button in the upper-right corner of this page for examples of mobile device address formats.
- Time Zone** – Please select the time zone that applies to this extension. Call reports, voicemail timestamps and notifications are all displayed in the correct local time for each extension.

The screenshot shows the 'My Halloo' user interface. At the top left is the Halloo logo and the tagline 'Innovative Communications Solutions'. Below this is a navigation bar with links for 'My Halloo', 'All Extensions', 'My Account', 'Affiliates', and 'Support'. In the top right corner, there is a user profile for 'Halloo John Doe!' with a 'Sign-Out' button and a 'Do not disturb' indicator. The main content area is titled 'Summary' and includes a sidebar with navigation links: Summary, Messages, Addresses, Call Log, and User Settings. The 'Summary' section displays the user's name 'My Halloo for John Doe', extension '01', and a 'Forward to:' dropdown menu set to 'Voicemail'. Below this, a 'Messages' section shows '0 new' and '0 saved' voice messages. A 'Refer a Friend!' section offers a reward for referring new customers. At the bottom, 'Hunt Groups' are listed with 'Block' and 'Accept' options for 'Sales hunt group' and 'Cust_serv hunt group'.

The screenshot shows the 'User Settings' page for user 'x01 - John'. The page has a sidebar with navigation links: Summary, Messages, Addresses, Call Log, and User Settings. The 'User Settings' section is divided into four tabs: General, Forwarding, Voicemail, and Schedule. The 'General' tab is active and contains the following fields:

- User Information:** Username (John), First Name (John), Last Name (Doe), and a checked box for 'User is an administrator'. There is also a field for 'New PIN' with a '(again):' label.
- Address/Contact Information:** Address, City, State, Zip, Email (john@testcustomer.com), Jabber ID (john@testcustomer@jabber.halloo), and Mobile Device (415-555-1234@vtext.com).
- Time Zone:** A dropdown menu set to 'U.S. Pacific' and a checked box for 'Observe daylight savings time'.

A 'Save Changes' button is located at the bottom right of the form.

Step 2. Insert Forwarding Numbers

How To – Forwarding Numbers:

- To set up Forwarding Numbers, click the [**Forwarding**] tab and enter your Home, Office, and/or Mobile number.
- Then click the [**Save Changes**] button. You will be able to choose your preferred forwarding location at the **Summary** page or when using the ‘click-to-record’ button for voicemail later on.

Notes regarding Forwarding Options:

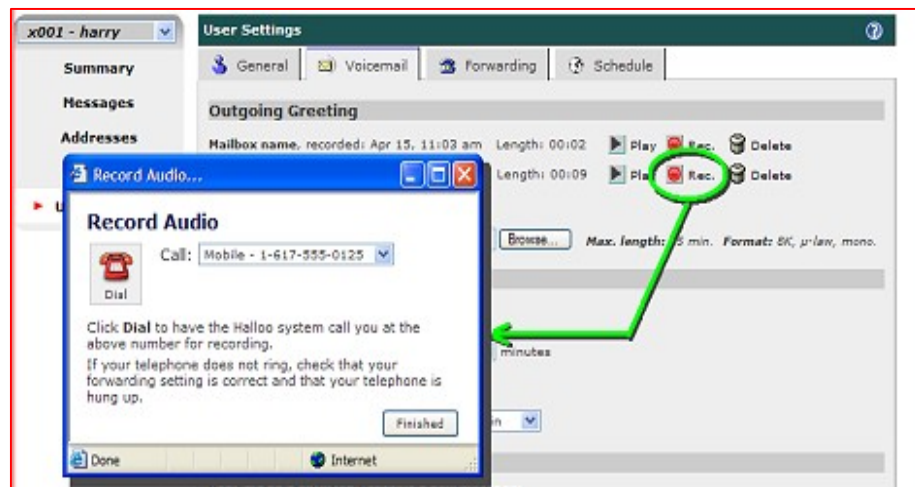
- Click [x] “Send IM...” only if you have already set up a Halloo Jabber account. This IM client is free, but requires a software download and registration. See our [Support](#) page for **IM Notification** for instructions or details. Activate this checkbox if you wish to receive a Jabber IM notification for new incoming calls.
- Click [x] “Connect to Halloo Dialtone...” option to save time when checking voice mail messages by phone. Once activated, this feature will enable the Halloo System to ‘recognize’ whenever you call into your mailbox from one of the previously entered **Forwarding Numbers**.
- Click [x] “Use my Halloo number for Caller-ID” will allow you to see your own toll-free number on your home, office, or mobile caller-ID display whenever someone calls your Halloo extension instead of their original caller-id.

The screenshot shows the 'User Settings' page for a user named 'x01 - John'. The page has a navigation bar at the top with 'My Halloo', 'All Extensions', 'My Account', 'Affiliates', and 'Support'. On the left, there is a sidebar menu with options: Summary, Messages, Addresses, Call Log, and User Settings (which is highlighted). Below the sidebar is a 'Refer a Friend!' section with a description and a 'Details...' link. The main content area is titled 'User Settings' and has four tabs: General, Forwarding (which is active), Voicemail, and Schedule. Under the 'Forwarding Numbers' section, there are three input fields: Home (1-415-555-2233), Office (1-415-555-9966), and Mobile (1-415-555-1234). To the right of the Home field is a placeholder 'NXX-NXX-XXXX'. Below this is the 'Forwarding Options' section with three checked checkboxes: 'Send IM notice for incoming calls', 'Connect to Halloo Dialtone when I call in', and 'Use my Halloo number for Caller-ID'. A 'Save Changes' button is located at the bottom right of the page.

Step 3. Set up Voicemail

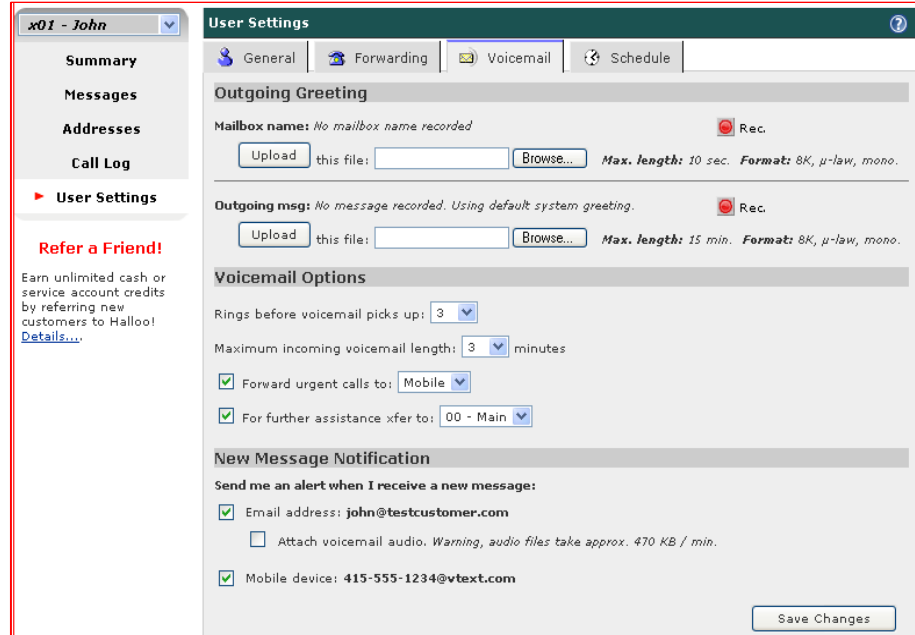
How to - Record voicemail greeting or mailbox name:

3. Navigate to the **User Settings / Voicemail** page.
 4. Click the [o] Record button to open the **Record Audio** dialog box.
 5. Select which forwarding line you will use to make your audio recordings.
 6. Click the [DIAL] telephone icon to have the Halloo System initiate the call.
- **NOTE:** Make sure that your telephone is ready to receive incoming calls. We suggest that you use a 'landline' telephone, preferably not cordless, to ensure the highest quality audio.
 - **NOTE:** Changing the dialed number in the **Record Audio** dialog box WILL UPDATE your forwarding preferences! Make sure you update your recording preference after recording by checking your **Summary** page (see step 1.)



Notes regarding Voicemail Options:

- Any member of a Hunt Group or Queue should have AT LEAST 3 rings before Halloo voicemail picks up to optimize automatic routing between extensions.
- If you are forwarding calls to a mobile number that roams out of range, there is a tendency by the mobile service provider to accept the call on your behalf. This could cause callers to reach your mobile phone's voicemail instead of Halloo.
- When your system is set to forward voicemail with attached audio to your email address, your original Halloo voicemails will continue to accumulate on your **Messages** page in your Halloo account. The voicemail feature is designed this way to prevent loss of critical voicemail messages in case of unexpected email connectivity delays or problems.
- To avoid incurring excess **audio storage** fees, you should log into your My Halloo website on a regular basis and delete the **Messages** from your account.



Step 4. (Optional) Scheduled Forwarding Rules

How to – Schedule:

- To add a scheduled forwarding rule, enter the start time, end time, forwarding destination and an optional comment in your weekday or weekend schedule.
- To enter an overnight rule, you must enter separate rules for evening and morning portions of that preference. See the example below, which has calls going to voicemail from 7pm to 8am.

Example:

- Midnight – 8am > Voicemail
- 8am – 5pm > Office
- 5pm – 7pm > Mobile
- 7pm – Midnight > Voicemail

The screenshot shows the 'User Settings' interface for user 'x01 - John'. The 'Schedule' tab is active, displaying 'Scheduled Forwarding Rules'. There is an unchecked checkbox for 'Enable schedule'. Below this, there are two sections: 'Weekday (Mo, Tu, We, Th, Fr):' and 'Weekend (Sa, Su):'. Each section contains a table with columns for Action, Start, End, Forward To, and Comments. The Weekday section has three rows of rules: 1) Action: Voicemail, Start: Midnight, End: 9 am, Forward To: Voicemail, Comments: Before Business Hours; 2) Action: Office, Start: 9 am, End: 5 pm, Forward To: Office, Comments: Business Hours; 3) Action: Voicemail, Start: 5 pm, End: Midnight, Forward To: Voicemail, Comments: After Hours. Below the table is an 'Add' button and two dropdown menus for Start and End times, both set to 'Noon', and a 'Forward To' dropdown set to 'Home'. The Weekend section has one row: Action: Voicemail, Start: Midnight, End: Midnight, Forward To: Voicemail, Comments: Weekends. Below this is an 'Add' button and two dropdown menus for Start and End times, both set to 'Noon', and a 'Forward To' dropdown set to 'Home'. On the left sidebar, there are links for Summary, Messages, Addresses, Call Log, and User Settings (highlighted in red). Below the sidebar is a 'Refer a Friend!' section with a promotional message and a 'Details...' link.

IMPORTANT! Notes regarding rules:

- The “End” time value of each rule does not cause your forwarding preference to change or ‘revert’ to some other setting. Only a new “Start” time rule or manual change on your **Summary** page will redirect your calls.
- If you manually override your scheduled forwarding rules on your **Summary** page, remember that your newly elected forwarding preference will automatically change when your next rule starts. To prevent this, un-check the box that says “Enable Schedule”.