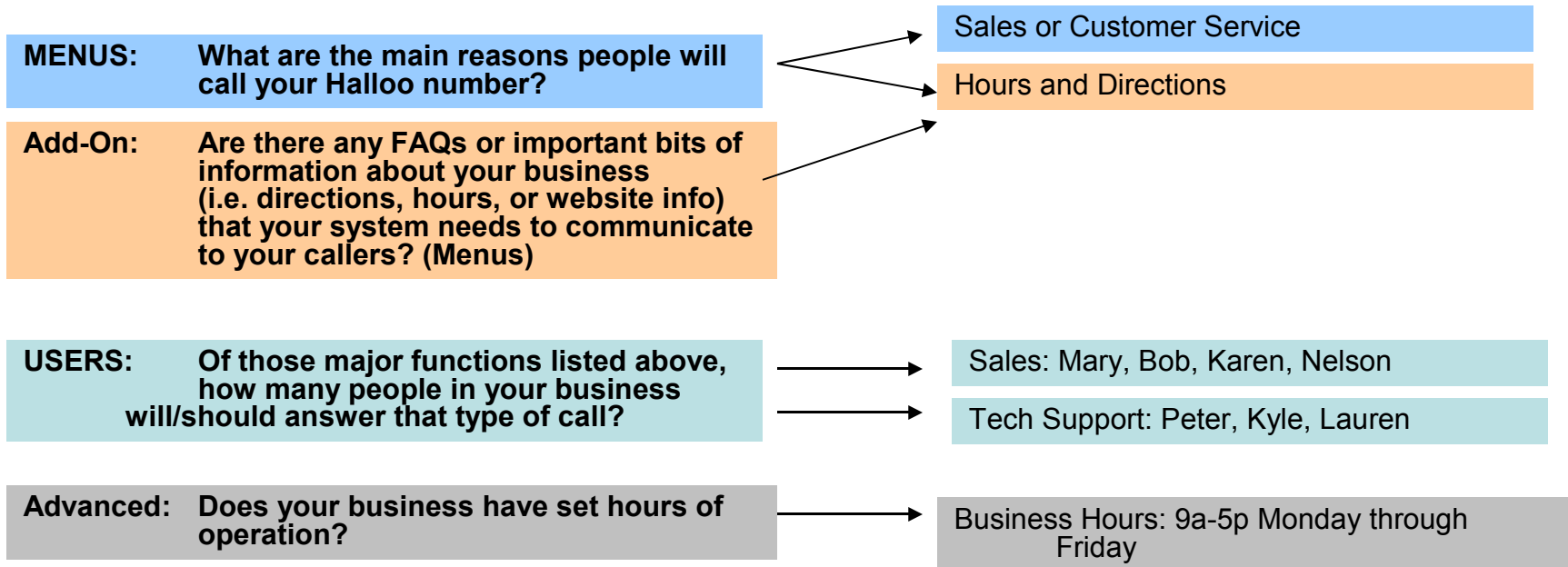# Halloo Communications Setup Guide

Level II. Administrators

Visualize your IVR (auto attendant)

In order to create the best possible customer service experience for your callers, you should be able to answer the following questions:

MENUS:	**What are the main reasons people will call your Halloo number?**	Sales or Customer Service
		Hours and Directions
Add-On:	**Are there any FAQs or important bits of information about your business (i.e. directions, hours, or website info) that your system needs to communicate to your callers? (Menus)**	

USERS:	**Of those major functions listed above, how many people in your business will/should answer that type of call?**	Sales: Mary, Bob, Karen, Nelson
		Tech Support: Peter, Kyle, Lauren

Advanced:	**Does your business have set hours of operation?**	Business Hours: 9a-5p Monday through Friday

Once you have conceptualized your customer's call experience, you can efficiently set up the user extensions and Auto Attendant feature of your Halloo Web.

From here, you will be working from the internal "back-end" of the call (where people actually reach you) and work your way up to the first impression your customers .

Begin by adding the User Extensions to your system.

View your list of Extensions

3. The **All Extensions** page provides admin access into any of the user extensions or Auto Attendants in your Halloo system.

5. Click the [User…] button to add a new extension.

7. Complete all required fields. Pin number must be a minimum of 4 digits. Assign an extension number and administrator privileges, where applicable.

9. Click [Create]. Send the user their log in information, along with the *Halloo Quick Setup Guide for individual users*.

Notes regarding New Users

- You should only create extensions for people in your work group who wish to receive forwarded calls, or people/functions in your system that require an individual voicemail box. Many companies create an extension as a "General Voicemail" box.

- **PIN & Extension #'s** – PIN number must be at least 4 digits, and may be changed by new user in the future. Each extension number must be unique – an account cannot have duplicate extension numbers.

- **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.

- **Forwarding Numbers** – should be entered if known, for easy activation by the individual user later on.

- **Email, Jabber ID,** and **Address:** Enter the required addresses in these fields if you intend to activate voicemail notification options later on. Enter the Address if you intend to include this extension in the dial-by-address feature for your Auto Attendant.

- **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.

Creating New Menus

- Click the All Extensions link, then click on the Auto Attendant you wish to edit. (Main is usually default)
- Your Auto Attendant probably already contains a few menus in template form. Use the **1.Greeting** menu as your main message to greet customers.
- Create a [**New Menu**] for any pre-recorded messages your callers should to hear as they navigate through your system, before they reach a live person or voicemail box.

Note: This includes After Hours Greeting messages.

- Use [**Special Menus**] to set up *Hunt Groups* when you have to link multiple people to receive similar types of phone calls (i.e. "Sales", or "Customer_Service").

Creating Events to LINK your Menus

- There **must** be a matching event to every instruction given in your menus! If you tell callers to enter "123", there should be an **event** that tells your system where calls go if <1>, <2>, <3> is entered.
- Create a [**New Event**] for any key press combination your caller will enter with their telephone. You can also [**edit**] or [**delete**] events. See example on right.
- Events can either **xfer to** (transfer to) one of your user extensions, or **jump to** another menu in your attendant.
- From the main greeting, for example, if the instruction says "*Press 3 for business hours*", your event should be listed in the menu as {**keypress: 3 > jump to menu: hours**}.
- **Timeout** events should be entered in case the caller does not press any valid selections. This will keep your callers from being hung up on!

Copyright 2006 Halloo Communications, Inc.

Set up automatic rules for After Hours Greetings

Stop! If you have not already created a menu for this after/hours greeting, go back to your Auto Attendant and do so now. If you already have a separate after hours menu with events, proceed to steps below:

3.	From your Auto Attendant page, click **Advanced Rules** on the left side of your screen.

4.	Click the [New Time Rule] button.

5.	Enter the days and times this rule will override your default menu (usually 1. greeting).

6.	Select which menu should play during these specified times.

7.	Click [Update]. Note, your rule will not be active unless you have checked the box that says "[x] yes".

	Remember, if you want a specific menu played overnight, you will need to create one rule for the evening (ending at midnight) and one rule at the start of the next morning (12:00am).
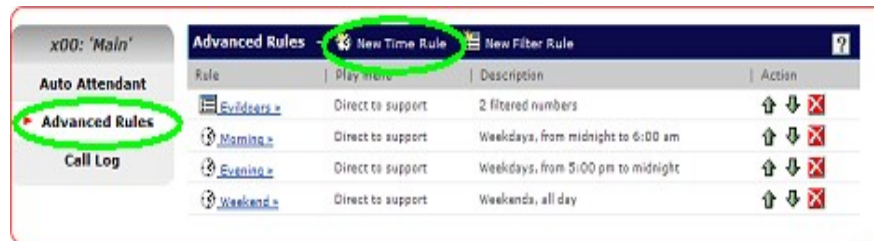
To find out more about advanced auto attendant features, go to www.halloo.com/support/Auto%20Attendant/. Here you will find instructions and examples for frequently asked questions, such as:

•	How do I record audio for the Auto Attendant?

•	How do I add more complex features like "dial-by-name"?

•	What is a Hunt group?

Visualize your IVR (auto attendant)

After you have created your user extensions, menus and events, and maybe some advanced rules, your system should be ready to receive and effectively route callers to the person or information they need.

MENUS:	**What are the main reasons people will call your Halloo number?**
Add-On:	**Are there any FAQs or important bits of information about your business (i.e. directions, hours, or website info) that your system needs to communicate to your callers? (Menus)**
USERS:	**Of those major functions listed above, how many people in your business will/should answer that type of call?**
Advanced:	**Does your business have set hours of operation?**

Don't forget to send "Quick Setup Guide for Individual Users" to the people on your team that have new User Extensions!

Visit the **My Account** pages to view usage, change your service plan and update payment information whenever needed online!

Main Greeting

After Hours Rules

AFTER HOURS

SALES Hunt Group

DIRECTIONS & HOURS

CUSTOMER SERVICE

Mary

Bob

Karen

Nelson

Order Tracking

Technical Hunt Group

Peter

Kyle

Laurie

Copyright 2006 Halloo Communications, Inc.