



Welcome to Halloo! Administrator's Guide

Welcome After signing up for a Halloo account, you will receive a welcome email. Follow the instructions to begin using your new phone services!

Benefits of Being an Administrator As an administrator, you have all of the individual user options plus additional features that you'll need to set up for your team (even if your team is really only you!).

Getting Started This user manual will help you understand the additional features that administrators set up for the team. Complete all steps in the Individual User's Guide, then complete the following steps to maximize the benefits of Halloo's phone system.

Contents

Topic	See Page
Common User Configurations	2
Add Users and Extensions	3
Add Users to Groups	4
Hunt Group Routing	6
Availability Settings for Hunt Groups	7
Set Up Auto Attendant(s)	8



Common User Configurations

Typical User Categories

Halloo customers typically fall into one of two categories:

- Your company has several users organized into two or three work groups that need a professional phone system solution.
- You are working alone but want to sound like you have a larger team when customers call.

Either way, Halloo has you covered!

Multiple Users

If you are setting up the account for multiple users, start thinking about the major functions of your team members – for example, customer service, sales, installation.

Single Users

For single users, you'll want to consider your functional areas of your business as well. The only difference is that you are the one, and only, member of every team!

Hunt Groups

These functional units (along with their individual members) will become hunt groups. But, first, let's talk about the auto attendant.

Auto Attendant

An auto attendant is a virtual phone system feature that answers your phone with a greeting of your choice.

Benefits of an Auto Attendant

The benefits of configuring your auto attendant, even if you are a solopreneur, is that you:

- Reassure callers they have reached the right number as you can set up the greeting to say, "Thank you for calling XYZ Company. We look forward to talking with you."
- Give the customer a better experience. Using forwarding numbers without the help of the auto attendant can often lead to lag time and uncertainty for the caller. While the system is transferring calls to forwarding numbers, your caller is not being greeted and often hears a series of disconcerting clicks.

Without the auto attendant greeting, callers are more likely to hang up before reaching a "real" person.



Add Users (and Extensions) to Your Account

Types of Extensions

Each individual, group, auto attendant or line that you would like to have a unique extension code must be listed here. Under Extensions, you can add a new:

- User,
 - Group,
 - Auto attendant,
 - Fax, or
 - Conference line.
-

Adding Extensions

Add new extensions by clicking on the appropriate classification button at the top of your screen.

The screenshot shows the Halo user interface. At the top, there's a header with 'halloo' logo, call information, and user details. Below that is a search bar and navigation links. On the left, there's a user profile for Alice Cathcart. The main area is titled 'Extensions' and contains a table with columns for Flags, Type, Name, Ext., DID, and Description. Above the table, there are buttons for 'New:' (User, Group, Attend., Fax, Conf.), 'Delete', and a search box. A red arrow points to the 'New:' button.

Flags	Type	Name	Ext.	DID	Description
<input type="checkbox"/>	Main	00	18662257095	BusyBiz	
<input type="checkbox"/>	alice	01		Alice Cathcart	
<input type="checkbox"/>	Sales	10		Sales Team	
<input type="checkbox"/>	Support	11		Support Group	
<input type="checkbox"/>	tracyb	15		Tracy B	
<input type="checkbox"/>	barbara	20	14085338470	Barbara Jensen	
<input type="checkbox"/>	charlie	21		Charlie Harper	
<input type="checkbox"/>	suzanne	22		Suzanne Lee	
<input type="checkbox"/>	Sales_VM	29		Sales VM	
<input type="checkbox"/>	jennifer	40		Jennifer Killian	
<input type="checkbox"/>	paula	41		Paula Gordon	
<input type="checkbox"/>	Support_Q	48			
<input type="checkbox"/>	Meet_Me	91	14085338469		
<input type="checkbox"/>	Cust_serv	98		Cust_serv group	
<input type="checkbox"/>	New_Orders	99		New orders fax inbox	

Press the **Create** button to finish adding the extension from each pop-up dialogue box. Repeat this process as many times as necessary to fit your company's needs.

More about Extensions

Creating a user extension is the primary way that a real person is associated with the system. Each extension is associated with a unique login to My Halo. All users have up to three forwarding numbers (Home, Mobile, Office), and a Voice Mail box.



Add Users to Groups

Overview

You can create groups such as sales, customer service, or returns as unique extensions (see instructions above). It is often easier for customers if your extension choices reflect functions within your organization instead individuals. Often, customers do not know the name of the individual that they need to speak with, but do know what type of service they are looking to receive.

Adding Users to a New Extension

Once you have created a group, you need to add users.

ext-newaatt - Google Chrome

my.halloo.com/dialog/ext-newaatt/?type=hunt

New Hunt Group

Extension Information

Name: e.g.: "sales"

Description: e.g.: "BusyBiz Sales"

Extension: 00-99

Time zone: Time zone to display in the call logs.

Adding Users

Click the + button to add users to your group.

halloo

Call: +1 Enter Number Location: 1-415-555-0104 (O) Alice Cathcart Sign out

busybiz Search people, companies and numbers Agent Console Extensions My Account Support

Alice Cathcart
x01 - alice
Tel: Anonymous

x10 - SALES MORE

Hunt Group

Sales hunt group routing order: Sequential hunt Round robin

Add user:

Action	Ext.	Name	Description
<input type="checkbox"/>	22	suzanne	Suzanne Lee
<input type="checkbox"/>	01	alice	Alice Cathcart
<input type="checkbox"/>	40	jennifer	Jennifer Killian
<input type="checkbox"/>	20	barbara	Barbara Jensen
<input type="checkbox"/>	41	paula	Paula Gordon
<input type="checkbox"/>	21	charlie	Charlie Harper

If hunt fails, transfer to: Directly to voicemail.

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Add Users to Groups, Continued

Changing the Order

Click the green up or down **arrows** to change the order of the group,

Deleting a Member

Select the red **x** to delete a member from the group.



Hunt Group Routing

Overview

Once you have created a group, you need to select the hunt group routing order.

Action	Ext.	Name	Description
<input type="checkbox"/>	20	barbara	Barbara Jensen
<input checked="" type="checkbox"/>	01	alice	Alice Cathcart

If hunt fails, transfer to: Directly to voicemail.

Changing Sequence

Click the desired radio dial (sequential or round robin) to change the routing sequence.

Sequential Routing

Sequential means that the call routing will start at the top of the member's list and work down toward the bottom, in order, until an available teammate is found.

Round-Robin Routing

Round robin means that the starting extension will rotate and then proceed sequentially down the list until an available agent is found.

Hunt Failure

Once you have created a group, you need to select what happens to the call if the hunt group routing does not reach an available team member.

Set Routing Options When All Are Unavailable

If your hunt group routing fails to find an available member, you can direct the call to the voicemail of an individual or a specially created user extension (for example, sales voicemail) by choosing the appropriate option from the dropdown menu at the bottom of this pop-up dialogue box.

Default Setting

By default, a failed hunt will revert to the routing instructions of the last person tried.

Remember!

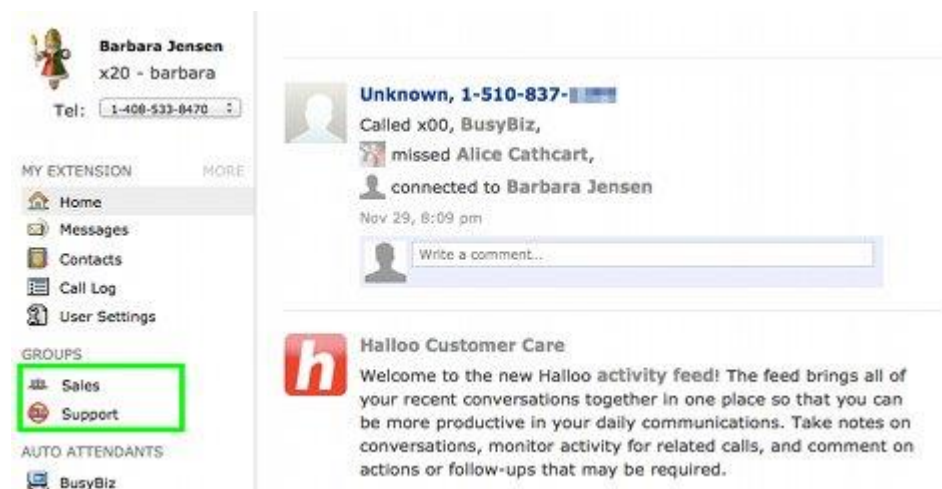
Select **Save Changes** before leaving this screen.



Availability Settings for Hunt Groups

User Availability Settings Users should be instructed to make themselves AVAILABLE and UNAVAILABLE at the start / end of their work shifts and also when they are taking breaks.

Users can block or accept calls from a Hunt Group in the My Halloo summary page. By blocking calls when you are unable to take calls, the system will automatically go to the next person in the rollover, speeding up the hunt process.



The left column on the My Halloo website will list hunt groups to which you have been assigned. You can temporarily block calls from a particular group by clicking on the small icon to the left of the group name. (See the green highlighted box above).

In the example above, Barbara is accepting calls from the Sales hunt group, but blocking calls from the Support group.

As a default, all new members of a hunt group are blocked. Click on the group name itself to see all members of the group and their current status.



Set Up Auto Attendant(s)

Overview

You can set up different messages for callers to hear while their call is being routed.

Uses of Auto Attendant(s)

The role of the auto attendant is to route calls (according to a set of rules that you define) to the correct Hunt Group, and ultimately a single User Extension, where a team member should answer the phone. Only if that person is not available will voicemail pick up. The auto attendant itself has no ability to take a message, it's the voice mailbox function that is triggered when the auto attendant fails to connect to a specific user.

For example, callers dialing one number may be routed differently than those dialing into your company via another direct inward dial line. In addition, callers selecting certain extensions may have different experiences depending on the rules associated with that specific auto attendant.

Customize the Default Auto Attendant

Your new account has one generic auto attendant menu. It's important that you customize your auto attendant to fit your business needs. To begin customizing your default auto attendant, click on the greeting link.

The screenshot shows the Halloo web interface. At the top, there's a navigation bar with 'halloo' logo, a search bar, and user information for 'Alice Cathcart'. Below the navigation bar, there's a sidebar with a user profile for 'Alice Cathcart' and a menu with options like 'Auto Attendant', 'Advanced Rules', and 'Call Log'. The main content area is titled 'Auto Attendant' and contains the following information:

- Extension: Main (x00)
- Phone number(s): 1-866-225-7095
- Default menu*: Greeting
- Save Changes button
- *Note: Advanced rules may be in effect which override the default menu.

Menu	Action
1. Greeting >	Play Delete
2. Hours >	Play Delete
Dial by Name Directory >	Delete
Dial by Extension Directory >	

A red arrow points to the '1. Greeting >' menu item.

Auto Attendant Options

When you click on the link for the Greeting auto attendant menu, the screen expands, giving you buttons for:

- Creating a new event,
 - Uploading audio,
 - Recording audio, or
 - Changing properties for this menu.
-



Set Up Auto Attendant(s), Continued

What Is a Menu?

A menu is a recorded message that presents options to the listener, for example, press 1 for sales, press 2 for support, or stay on the line for xyz.

A menu can be linked keypress events, timeout events, etc. Events are the actual IF-THEN instructions that tell the system what to do when a certain action is selected.

Note: Coordinating the greeting with events should make intuitive sense. Just because a greeting says, “Press 1 for Sales,” doesn’t guarantee anything will happen if you don't have a Keypress-1 event in the system!

New Events

By creating a new event, you can direct how a call is routed depending on a series of if/then statements.

Select the radio dial next to the appropriate **If** statement beginning – caller enters, no match, or time out. Enter the desired key presses or length of time before timing out in the space provided.

Next, select the radio dial to the corresponding **Then** statement option – transfer to, jump to menu, or hangup.

Click the **Create** button once you have made your selections. Repeat this step as many times as necessary to trigger the routing options you desire.

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Set Up Auto Attendant(s), Continued

Auto Attendant Tip

There are two ways to go with a timeout event.

1. A timeout event can be set so that the call is not disconnected if the caller does not press a valid selection.
 2. **Not** setting one requires your callers to press something in order to continue. While in some cases this may be an annoyance, the positive side is that it screens ROBO CALLERS. So depending on whether you are annoyed by occasional ROBO CALLERS or not, you can set a timeout event.
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Default Directories

Two special default menus are provided for your convenience – dial by name directory and dial by extension directory.

Dial by Name

When the dial by name directory is activated, callers can select their desired extension by dialing the letters in the associated person's name.

Dial by Extension

The dial by extension directory, when activated, allows callers to input their party's extension number directly.
