



## **Step by step guide on how to create a user on Aircall.**

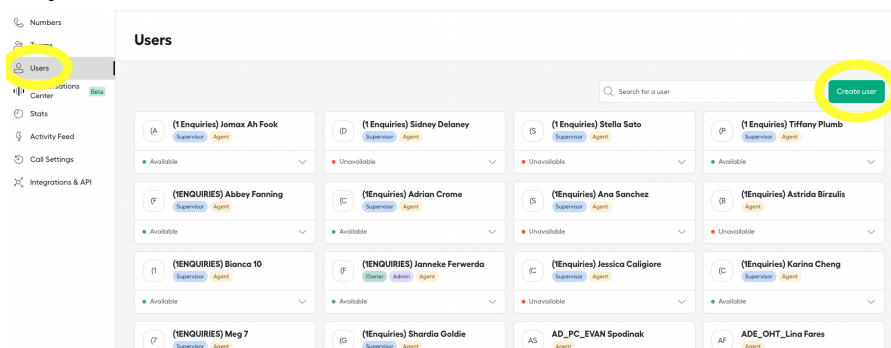
[Steps 1-10](#)

[FAQ:](#)

## Steps 1-10

**Step 1:** Log-in to aircall on your desktop web browser. You cannot add a user on the aircall app.

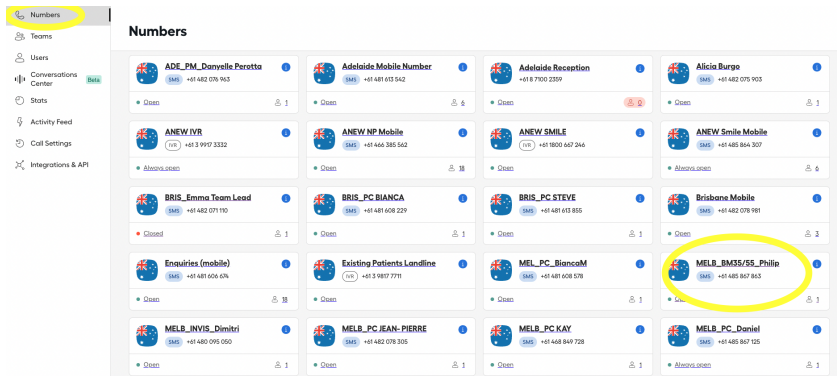
**Step 2:** select “Users” on the left hand side tab - Then select “Create user”.



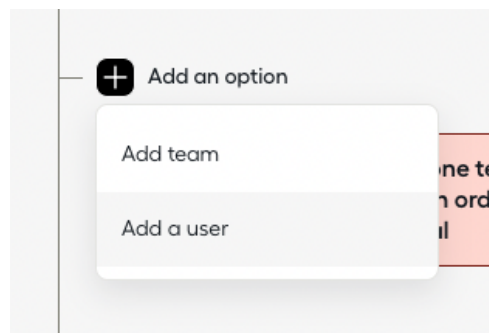
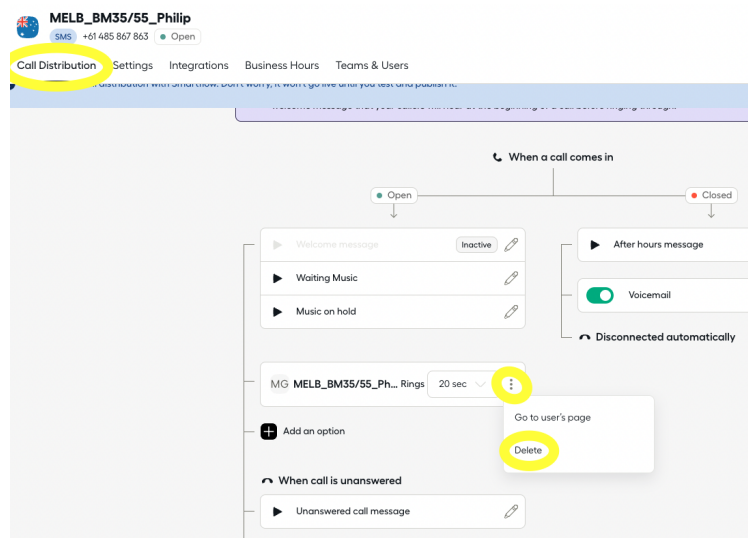
**Step 3:** Enter in the staff members details in the box that comes up. It should have First & Last name, and Email.

**Step 4:** The team member will receive an email from Aircall to create their user account.

**Step 5:** Associate this user with a “Number” if there is a spare number available or you are replacing someone else's number with this user, Select “Numbers” on the right hand side, and then select the number you want to use. In this instance I have chosen “MELB\_BM35/55\_Philip”

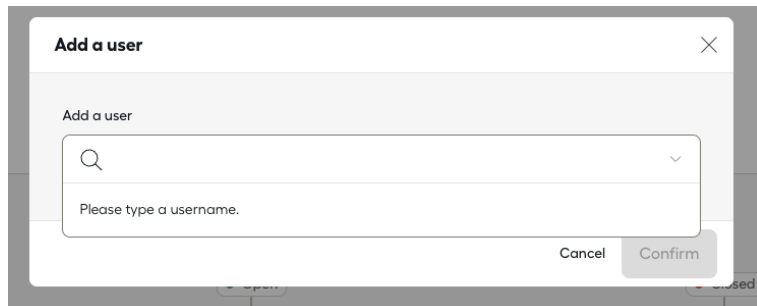


**Step 6:** Once you click on the number, it will go into the profile which will have multiple options at the top under the number. Select option “Call Distribution” then select the 3 dots next to the user already associated, and “Delete”.

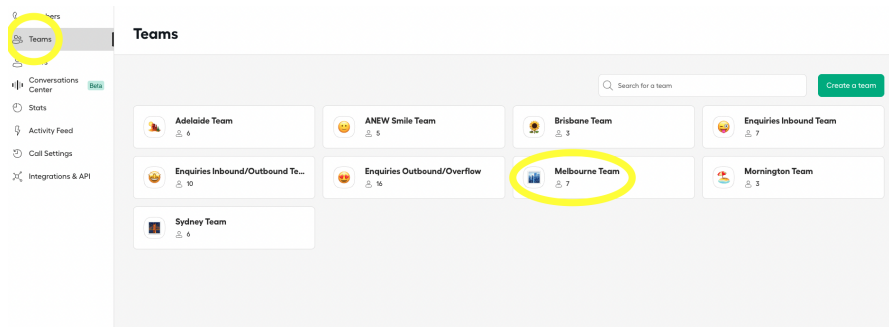


**Step 7:** Then Select “+ Add an option” and “Add a user”

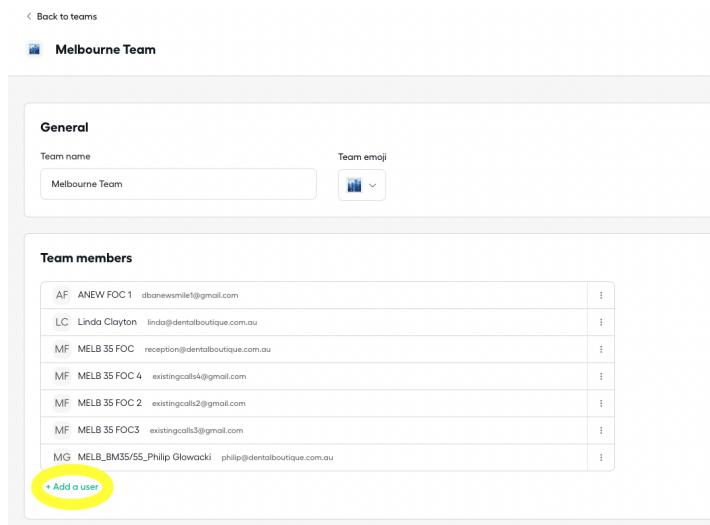
**Step 8:** Search the user you are looking for and select their name. They will then become the user of that number.



**Step 9:** If you want to also add this user to a team, for example in Melbourne, the Practice Manager is also added to the “Melbourne Team” so if the existing call line rings, their phone will ring too. You will need to select “Teams” on the left hand side, then select the team you want to add to. (Photo Below)



**Step 10:** Once selected the team, you can easily add a user by clicking “+Add a user”



## FAQ:

**If you need to create a new number for your user:** Please contact your area manager if you need to create a new number

### What type of “user” should it be set up as:

If you are setting up a team member on aircall on the picture below you will see there are multiple types of user settings.

If you are setting up for

FOC: **Agent** (This is preset setting)

PC: **Agent** (This is preset setting)

Team Lead: Agent + Supervisor

BM/PM, Area Manager: Agent + Admin

**Roles**  
Select multiple roles providing access to the phone app and/or dashboard.

**Phone app** FOC  
 Agent new  
Access to the phone app is always enabled for every user.

**Dashboard**

Owner new  
Access to Users, Company general, Company plan, Company billing, Company security and Company roles.

Admin new **BM/PM, AREA MANAGER**  
Access to Numbers, Teams, Users, Stats, Activity Feed, Call settings, Integrations and Company roles.

Supervisor new  
Access to Stats, Activity feed, Call settings and Company roles.

**TEAM LEAD**

**Any further questions:** Please contact [molly@dentalboutique.com.au](mailto:molly@dentalboutique.com.au)