



Step by step guide Aircall.

[Steps 1-10, creating a user and associating them with a number](#)

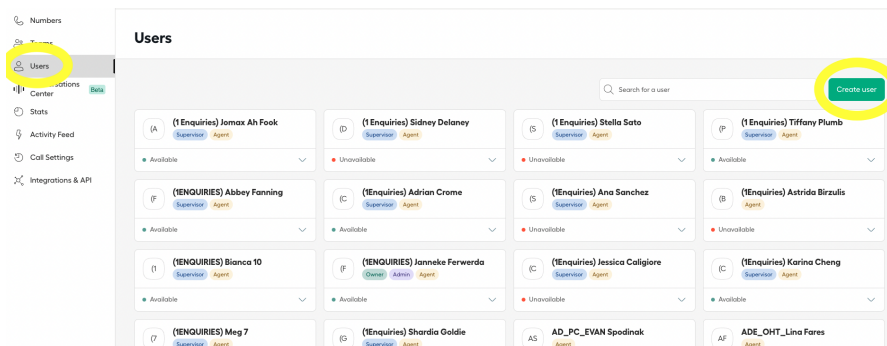
[How to Create a Call Distribution flow](#)

[FAQ:](#)

Steps 1-10, creating a user and associating them with a number

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

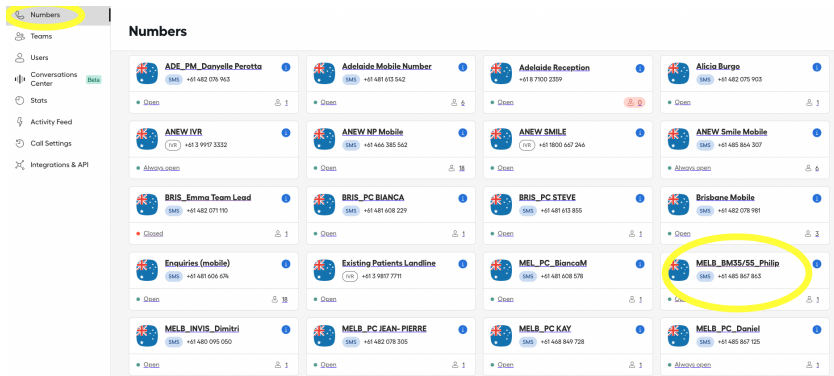
Step 2: select “Users” on the left hand side tab - Then select “Create user”.



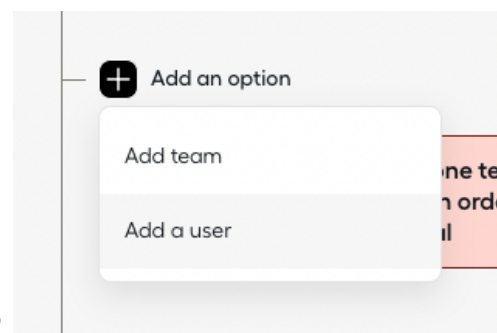
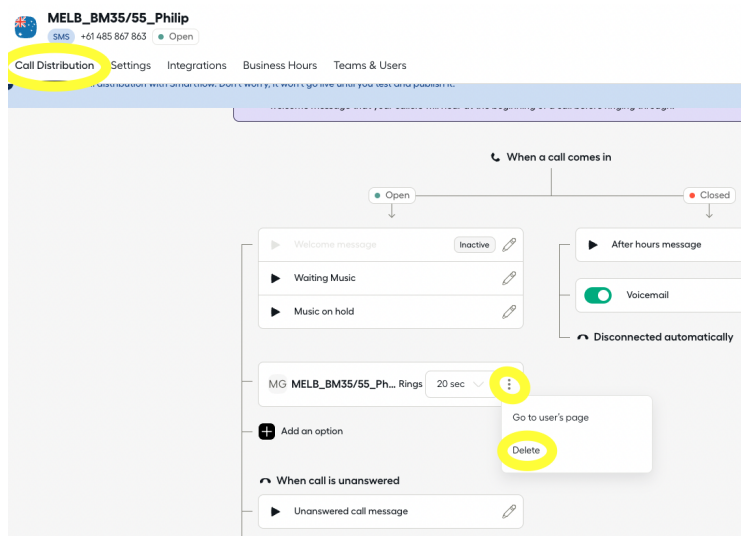
Step 3: Enter in the staff members details in the box that comes up. It should have First & Last name, and Email.

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

Step 5: (THIS IS FOR OLD NUMBERS PLEASE GO TO “HOW TO CREATE A CALL DISTRIBUTION FLOW & STEP 5 FOR NEW NUMBERS”) 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”

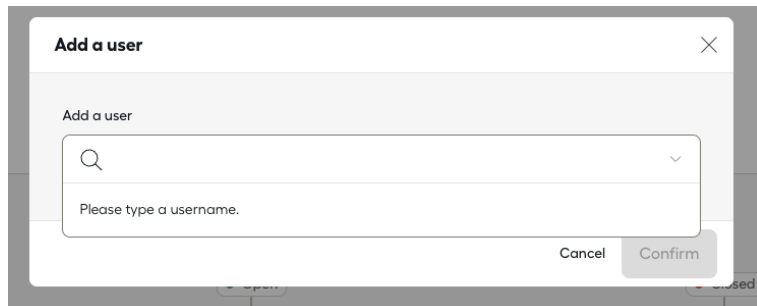


Step 6: Once you click on the number, it will go into the profile which will have multiple options at the top under the number. Select option “Call Distribution” then select the 3 dots next to the user already associated, and “Delete”.

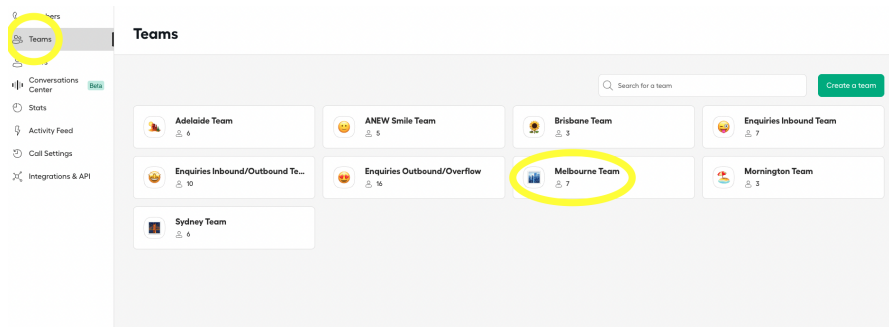


Step 7: Then Select “+ Add an option” and “Add a user”

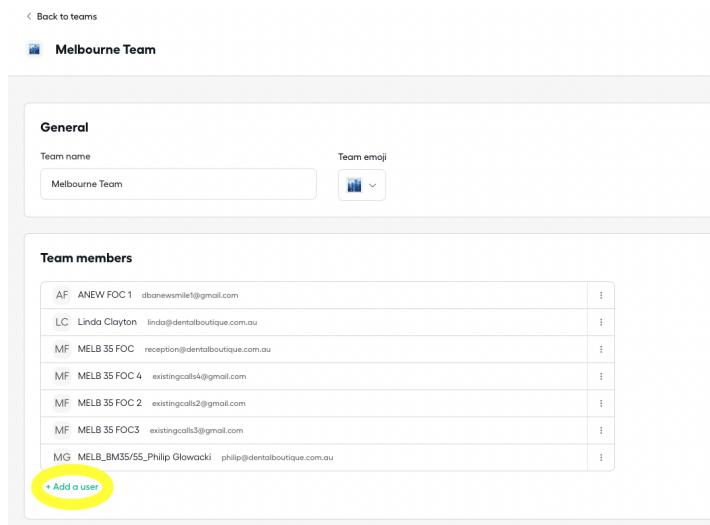
Step 8: Search the user you are looking for and select their name. They will then become the user of that number.



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)

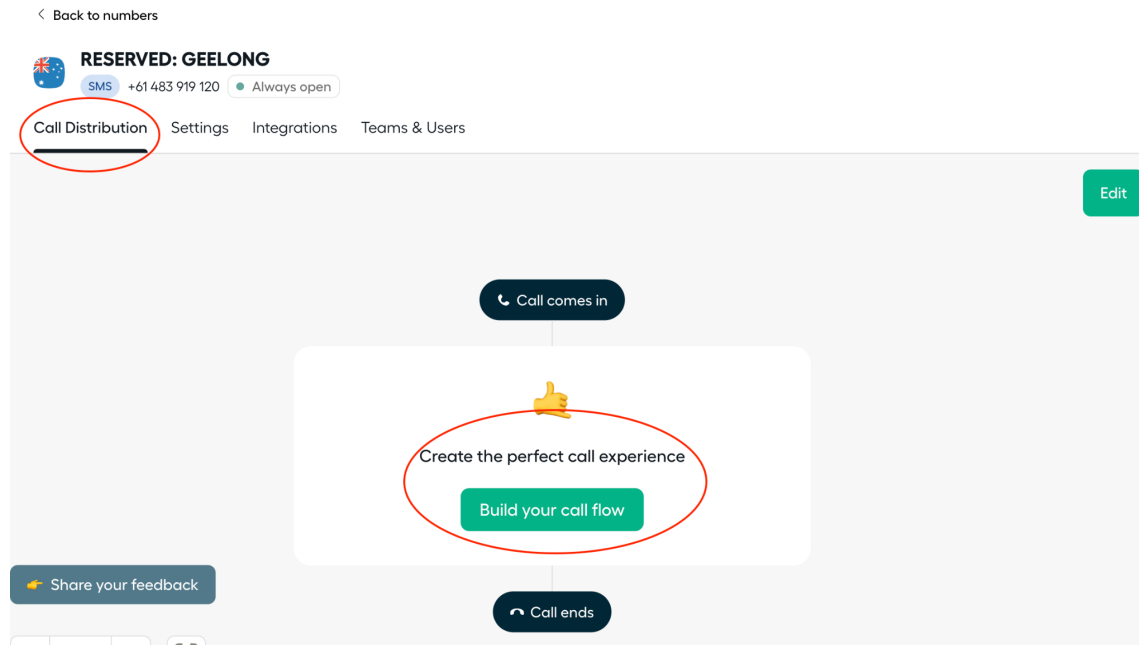


Step 10: Once selected the team, you can easily add a user by clicking “+Add a user”

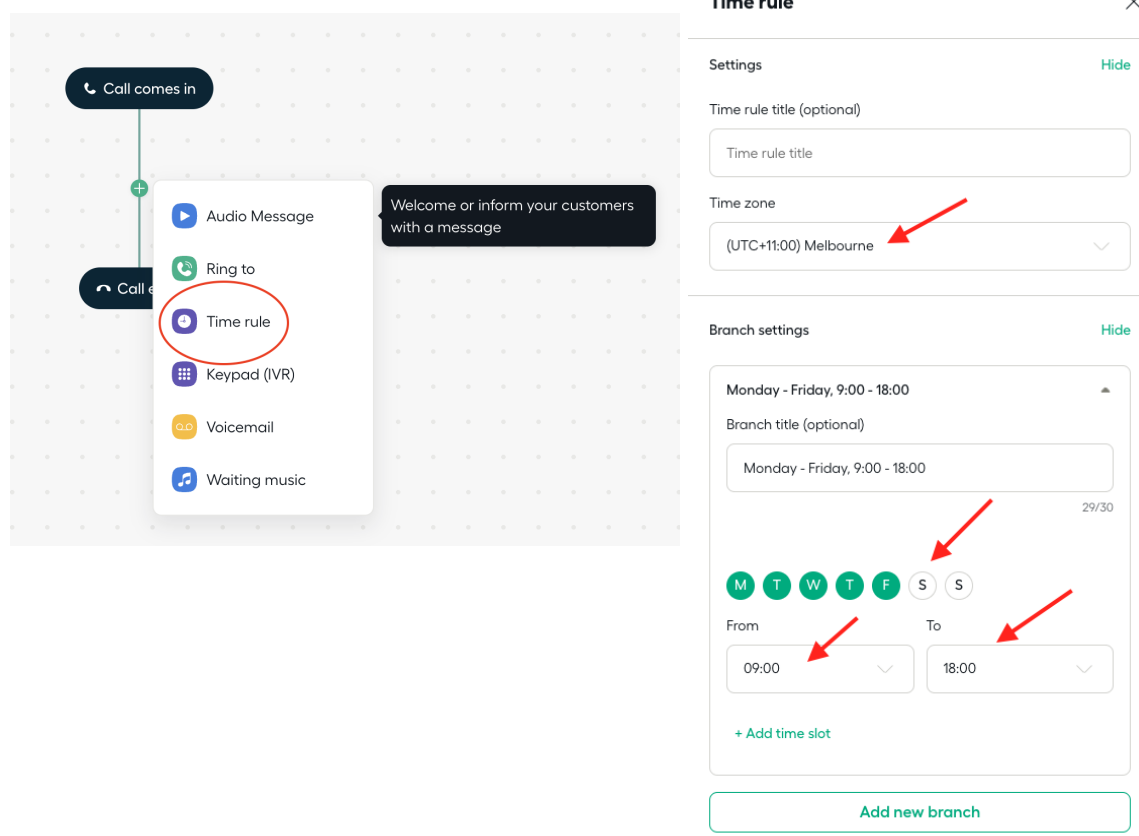


How to Create a Call Distribution flow

Step 1: Click on the number you need to create a call distribution for and select “Build your call flow”



Step 2: The first thing you need to add to your flow is the “Time Rule” this will then allow you to select your opening hours, and divert the patient to voicemail if you are closed out of those hours. Make sure to select the time zone you are in, the days the clinic is open and the opening hours of the clinic.



Step 3: Once you have added your time rule, you now need to add a voicemail for when the clinic is closed, you can do that by selecting the (+) and adding "Voicemail", a pop up will now appear on the side which you will be able to name the voicemail "After hours message". The type of message will be "Text to speech", and the message is:

Thank you for calling ***Either your name or the practice name*** you have called outside of business hours, please leave me a voicemail or send me an SMS and I will return your call within the next Business day, Thank you"

Smartflow Editor Publish

Voicemail ✕

Voicemail title (optional)
After hours Message

i Steps configured after a "Voicemail" are ignored. Once the caller leaves a voicemail the call ends.

Message settings Hide

Type of message
Text to speech

Message
Thank you for calling Dental Boutique, you have called outside of business hours, please leave me a voicemail of send me an SMS and I will return your call within the next business day.

Language Voice
English Joanna

Step 4: You will now need to add waiting music for the Days/Times you are open and a patient calls through, you need to add these twice, one is wiring music for the ring tone and one is waiting music jingle. You add these by clicking the (+) and selecting "Waiting Music". The first one is called "Ringing tone (Australia)" and the

Waiting music
Ringing Tone (Australia)

Waiting music
Bensound - Retro Soul

Waiting music ✕

Settings Hide

Waiting music title (optional)
Waiting music title

Music type
Audio library

Select audio
Ringing Tone (Europe)

Bensound - Energy
Bensound - Retro Soul
Bensound - Jazzy Frenchy
Ringing Tone (Australia)

Step 5: You now need to add a “Ring to” which is where you can add your user that you have created, a section will pop up on your screen and you can then add the user in the “Ring to” section by searching and clicking on the user, and making sure you add the “Ring for” for 25 seconds.

Then in the second drop down, making sure to select “Skip if busy” so the phone will not ring if the team member puts themselves on “Unavailable”

The screenshot displays the Smartflow Editor interface. On the left, a call flow diagram is visible with the following steps:

- Monday - Friday, 9:00 - 18:00** (Time slot)
- Waiting music** (Ringing Tone (Australia))
- Waiting music** (Bensound - Retro Soul)
- Molly Brown** (Ring for 25 sec, Ring even i...)
- Call ends** (End of call)

On the right, the **Ring to** settings panel is open, showing the following configuration:

- Ring to:** Molly Brown (selected)
- Ring for:** 25 sec
- Agent Settings:**
 - Ringing rule:** Skip if busy (selected)
 - Ring even if busy:** (unchecked)

Red circles highlight the 'Ring to' section and the 'Skip if busy' option in the 'Agent Settings'.

Step 6: The last step is to then create a voicemail for the opening hours, and the team member is unavailable. You can do this by selecting the (+) and then selecting Voicemail. This is named “Unanswered call message”, then copy the following message into text to speech “Hello, This is XXXX from Dental Boutique. Unfortunately I am unable to take your call right now. I will call you back as soon as possible. In the meantime, please feel free to leave me a message or send me an SMS. Thank you.” (Photo Below)

Smartflow Editor ✓ Published

Voicemail ✕

Voicemail title (optional)

Unanswered call message

i Steps configured after a "Voicemail" are ignored. Once the caller leaves a voicemail the call ends.

Message settings Hide

Type of message

Text to speech

Message

Hello, This is Jess from Dental Boutique. Unfortunately I am unable to take your call right now. I will call you back as soon as possible. In the meantime, please feel free to leave me a message or send me an SMS. Thank you.

Language English Voice Kendra

Step 7: Publish your changes at the top right hand corner!

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