

Business Digital Voice

Simple setup worksheet

This guide is designed to help you with the initial set up of your Business Digital Voice service. First, complete this form and then locate your Business Digital Voice username (sent via email) then log into the admin portal.

Basic onboarding

Your Business Digital Voice WalkMe onboarding process is broken down into two phases, Basic and Advanced. The Basic Onboarding Flow takes you through the setup of the most common service and features your business will need to operate at its fullest potential.

The basic flow includes:

Question 1: Set up a user

Build your users in the system. Be prepared to enter the user's:

- ▶ First name
- ▶ Last name
- ▶ Email address

Question 2: Set up your office hours

When will your business operate?:

- ▶ Monday _____
- ▶ Tuesday _____
- ▶ Wednesday _____
- ▶ Thursday _____
- ▶ Friday _____
- ▶ Saturday _____
- ▶ Sunday _____

Question 3: Configure your main business number

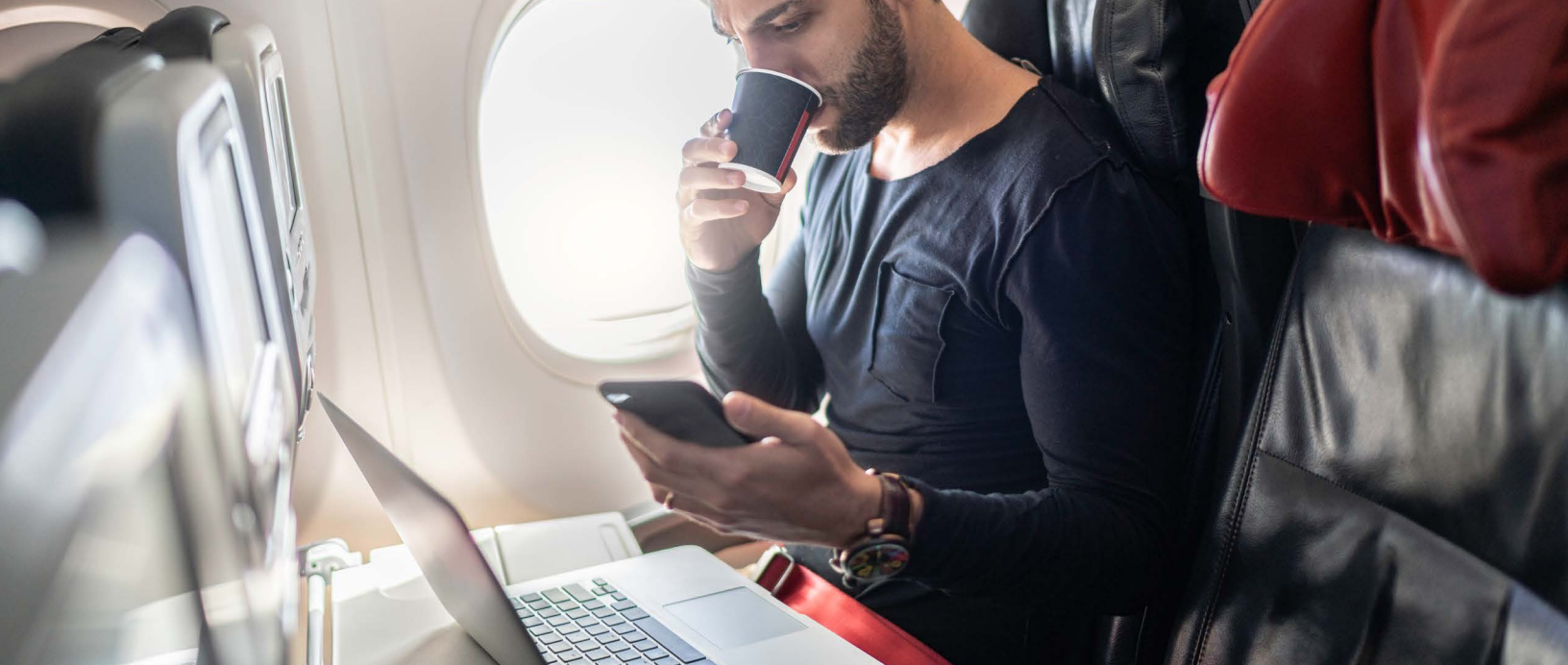
Note: This is done during your installation process. However, you can choose to change where your main number rings in this step.

Has your Business Digital Voice system already been installed?

Yes _____

No _____





If yes, would you like your main business number to ring a different user than the one set up during your service installation? If so, be prepared to enter the user's:

- ▶ First name _____
- ▶ Last name _____
- ▶ Phone number _____

Question 4: Configure your auto attendant

Auto attendants are automated greetings providing callers with information and dial menu options. They can also be used as a fail-over option when the main number cannot be answered.

Sample greeting: Thank you for calling ABC company, we are currently assisting other callers, but your call is important to us. You may reach your desired party. When configuring your auto attendant, make sure to have the following ready:

- ▶ Auto attendant phone number _____
- ▶ Menu options _____

Advanced onboarding

Once you complete the basic flow, you have the option to set up advanced features for your business. The advanced flow includes:

- Collaborative bridge
- Hunt groups
- Music on hold
- Office hours
- Auto attendant: greetings and dialing options