

Call Flow - Setup

Description:

Callflows define the flow of a call, or which instructions to process when someone dials a specific phone number. You can utilize our callflow management tool to configure the flow of a call, and in the process, you can configure the majority of other services exposed within the user interface. Callflows are configured by assigning a phone number to the callflow and dragging elements from the toolbox on the right-hand side of the screen to the callflow. You can stack callflow elements on top of each other to indicate you want the action you are dragging to occur after the action you drop it upon.

This article will show you how to do the following:

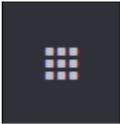
- **How to add your main number to Smart PBX**
- **How to Create and Enable a Call Flow**
- **How to Create an Auto Attendant**
- **How to Create a Ring Group**
- **How to Setup Time Conditions for Open/Closed Call Flows**

Methods:

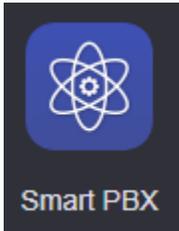
01. [How to add your main number to Smart PBX](#)

Description: *This section outlines how to assign a phone number to be the Main Number.*

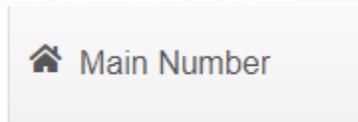
1. **Login to the Audian Portal**
2. Click the **9 square button** at the top right of the screen.



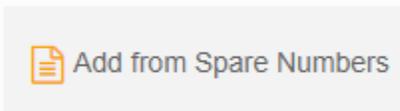
3. Click on the **Smart PBX** app.



4. Click **Main Number** on the left.



5. Click **Add from Spare Numbers**.



6. Select the number(s) that apply, and then click **Add selected numbers**.

Spare Numbers of KB Demo

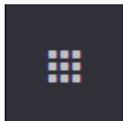
+1 503 555 5564 

- If you do not see the number, please **contact Audian** at 844-611-6110 opt 2.

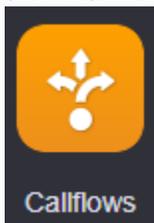
02. How To Create an Advanced Call Flow

Description: *This section outlines how to build your main number call flow, but this guide can also be used to create other call flows such as the After Hours menu or Holiday menu.*

1. **Login to the Audian Portal.**
2. Click the **9 square button** at the top right of the screen.



3. Click on **Callflows**, then click on **Callflows** once more.



4. Click **Add Call Flow** on the left and build the main call flow.
5. Click the **paper and pencil edit button**, and then name the call flow using the naming format below.



If you have multiple locations under one account, then put the location name at the end to keep track of which call flow is which.

- **01 | Main Callflow**
 - **02 | After Hours**
 - **03 | Holiday**
 - **04 | Emergency or Temp Forward**
6. Check **List this callflow in Main Number**, and then click **Save**.
 - This will allow you to assign the callflow in the Incoming Call Handling section of Smart PBX.

Edit Callflow Name



Callflow Name:

Hide from Contact List

List this callflow in Main Number

Giving a name to a callflow isn't mandatory. Leave the field blank and the callflow will be displayed in the left listing as the list of numbers used in this callflow.

Save

7. Now we add the extension by clicking the **Click to add a number** section.

01 | Main Callflow

Click to add number

- You can dial that extension at any time to access this call flow and re-record the greeting.

8. Select the phone number from the drop down box or select Extension and enter a number, and then click **Add**.

Add number



Spare Numbers

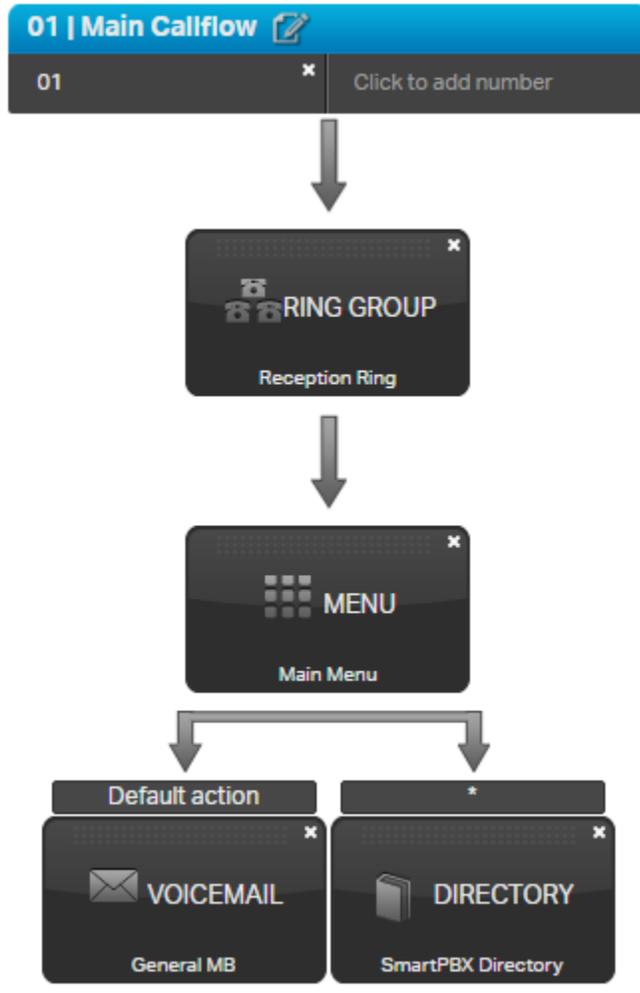
Extension

Find Extension

Add

- Note:** Clicking **Find Extension** will show you a list of all of the currently assigned extensions for this account.
9. **Build out the rest of the call flow** by referencing the following articles.
- Call Flow - Auto Attendant Setup

- How To - Ring Groups Setup - CallFlows



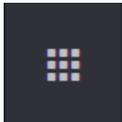
10. Click on the **Save Changes** button.

03. How To Enable A Call Flow

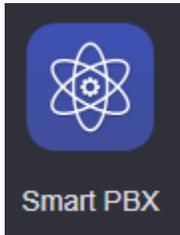
Description: *This section outlines how to enable call flows for your Open, Closed, Lunch, and Holidays.*

- After Hours and Lunch call flows can only be set after the Open/Closed hours are set.
- Holiday call flows can only be defined once Holidays is enabled in the Holiday section.

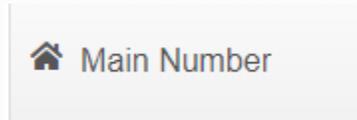
1. **Login to the Audian Portal.**
2. Click the **9 square button** at the top right of the screen.



3. Click on the **Smart PBX** app.



4. Click **Main Number** located on the left.



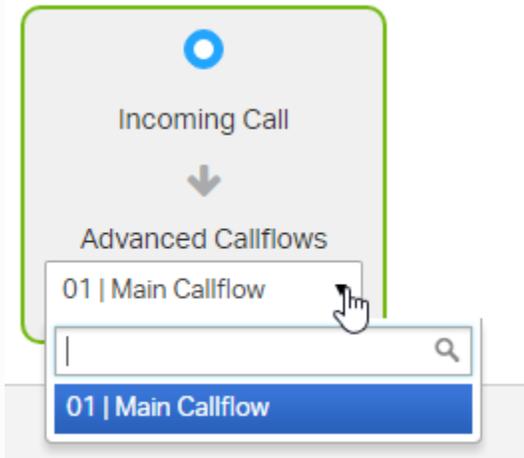
5. Click on the **Incoming Call Handling** button.



6. Select one of the **Hour** tabs.



7. Select the **Advanced Callflows** dropdown and select the call flow you would like enabled.

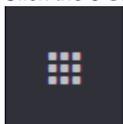


8. Click the **Save Changes** button at the bottom.

04. How To Setup Open/Closed Hours

Description: This section outlines how to set up your business open and closed hours for your call flow when your in and out of the office.

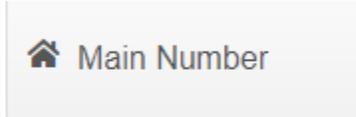
1. **Login to the Audian Portal.**
2. Click the **9 square button** at the top right of the screen.



3. Click on the **Smart PBX** app.



4. Click **Main Number** located on the left.



5. Click **Office Hours Strategy**.



6. Choose either **24 hours Open Office** or **Custom**.

Office Hours Strategy ▼

24 hours Open Office
Choose this option if you want incoming calls to be handled the same way all the time.

Custom Office Hours
Choose this option if you want incoming calls to be handled differently when your office is closed.

7. After selecting **Custom Office Hours**, a day of the week and time frame will open.

Custom Hours Company Timezone: Los Angeles (America)

<input checked="" type="checkbox"/> Monday	9:00	to	17:00	Open
<input checked="" type="checkbox"/> Tuesday	9:00	to	17:00	Open
<input checked="" type="checkbox"/> Wednesday	9:00	to	17:00	Open
<input checked="" type="checkbox"/> Thursday	9:00	to	17:00	Open
<input checked="" type="checkbox"/> Friday	9:00	to	17:00	Open
<input type="checkbox"/> Saturday				Closed
<input type="checkbox"/> Sunday				Closed

Are you closed for lunch hours?

i Do not forget to set the call routing for when your office is closed for the night! To set it up, go in the "Incoming Call Handling" section of this page, and select the "After Hours" tab.

If your office is closed during lunch hours, you also need to choose the call routing for that. You can set it up in the "Incoming Call Handling" section as well, under the "Lunch Hours" tab.

8. If your office closes for lunch, select **Are you closed for lunch hours?** and then set the time window.

9. Click on the **Save Changes** button.

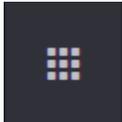
Save Changes

05. How To Setup Holiday Schedules

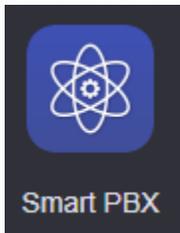
Description: *This section outlines how to set up a holiday schedule.*

You will need to create a call flow in section 2 listed above, and then enable the Holiday schedule by following the directions in section 3 listed above.

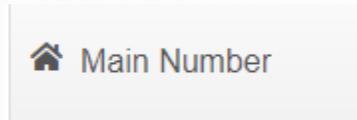
1. **Login to the Audian Portal.**
2. Click the **9 square button** at the top right of the screen.



3. Click on the **Smart PBX** app.



4. Click **Main Number** located on the left.



5. Click **Office Holidays**



6. Check the box that says **Are you closed for holidays?**
7. Click **Add Holiday**.
8. Select the preferred type of Holiday event to be created.
 - **Single Day** - Select a specific date to be closed.
 - **Date Range** - Select a start and end date.
 - **Advanced** - Allows for options such as 3rd Tuesday of March to be set.
9. **Fill In** the specified holiday info.

10. Click on the **Save Changes** button.

Office Holidays ▼

Are you closed for holidays?

[Add Holiday](#)

i Do not forget to set the call routing for when your office is closed for the holidays! To set it up, go in the "Incoming Call Handling" section of this page, and select the "Holidays" tab.

[Cancel](#) [Save Changes](#)