

# STEPS TO SET UP A FREE TRIAL

Welcome to Virtual Headquarters. Below is a step by step guide to setting up your FREE 7 Day Trial for your Virtual Receptionist service. We focus only on those fields you need to complete so ignore all others.

**Step 1:** Click 'GO' on the Sign Up FREE 7 DAY TRIAL button which appears on the top right of our Home Page.



**Step 2:** You will note the system defaults to the “Virtual Receptionist - Free 7 Day Trial” option at the top.

Available Subscriptions		
Virtual Receptionist Phone Answering Package	Monthly Fee	Top-up Account
<input checked="" type="radio"/> <b>Virtual Receptionist - Free 7 day Trial</b>	\$0.00	\$0.00*
<input type="radio"/> <b>Virtual Receptionist - Standard</b> No prepaid calls. Pay for what you use at \$2.50 per call.	\$40.00	\$50.00
<input type="radio"/> <b>Virtual Receptionist - Lite</b> 5 included inbound calls per day.	\$85.00	\$50.00
<input type="radio"/> <b>Virtual Receptionist - Executive</b> 10 included inbound calls per day.	\$125.00	\$50.00
<input type="radio"/> <b>Virtual Receptionist - Premium</b> 15 included inbound calls per day.	\$175.00	\$50.00
<input type="radio"/> <b>Virtual Receptionist - Maxi</b> 30 included inbound calls per day.	\$320.00	\$50.00

**Step 3:** Under the “Telephone Number City” section, from the **drop down menu** on the right, **click on the arrow**, to show a list of cities and click on the city of your choice (i.e. the city in which you want a local phone number).

## Telephone Number City

Select your preferred telephone number city:

(NB: We cover 3,000+ area codes. Please contact us if you require a local number not in this list)

Adelaide

**Step 4:** Click on the 'Next' button at the bottom right of this page.

Affiliate code:  (optional)

Next >>

## STEPS TO SET UP A FREE TRIAL

**Step 5:** From the list of phone numbers, select which number you want. Note that it defaults to the number at the top of the list, but if you wish a different number, simply **click in the circle next to the phone number** you want. **Important-** make a note of this number as it is the phone number Virtual Headquarters knows your company by.

Select your phone number(s)

Adelaide - batches of 1 number:	
<input checked="" type="radio"/>	08 8311 3998
<input type="radio"/>	08 8311 3969
<input type="radio"/>	08 8311 3976
<input type="radio"/>	08 8311 3978
<input type="radio"/>	08 8311 3965
<input type="radio"/>	08 8311 3963
<input type="radio"/>	08 8311 3959
<input type="radio"/>	08 8311 3961
<input type="radio"/>	08 8311 3980
<input type="radio"/>	08 8311 3984

**Step 6:** Click the **'Next'** button on the bottom right to continue

<< Back

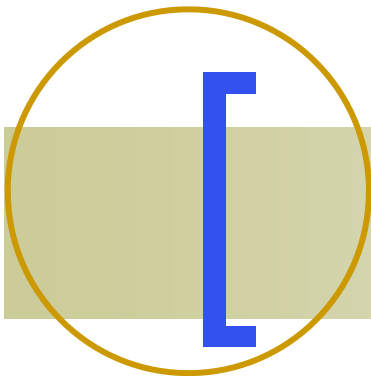
Next >>

**Step 7:** Ignore the top of this screen. Go to the **'Contact Information'** area at the bottom. Enter your email address in the **'Email'** field. Enter the **same email address** in the **'Validate Email'** field, to confirm your email address.

Contact Information
-- NEW CUSTOMERS --
Please enter your email address to create a new account.
Email <input type="text"/>
Validate Email <input type="text"/>
Continue (I Am a New Customer)

**Step 8:** Click on **'Continue (I Am a New Customer)'** field

Contact Information
-- NEW CUSTOMERS --
Please enter your email address to create a new account.
Email <input type="text"/>
Validate Email <input type="text"/>
Continue (I Am a New Customer)



## STEPS TO SET UP A FREE TRIAL



**Step 9:** Enter your details in the second block called **'Contact Information'**. Note those fields with an \* have to be completed. Choose the relevant **'Country'** by clicking on the arrow to access the drop down menu.

Contact Information	
First Name: *	<input type="text"/>
Last Name: *	<input type="text"/>
Secondary Contact:	<input type="text"/>
Company: *	<input type="text"/>
Role or Title: *	<input type="text"/>
Address: *	<input type="text"/>
Address:	<input type="text"/>
City: *	<input type="text"/>
State/Region: *	<input type="text"/>
Zip/Postal Code: *	<input type="text"/>
Country: *	<input type="text" value="United States"/>
Phone: *	<input type="text"/>
Fax:	<input type="text"/>
Primary Email: *	<input type="text"/>
Web Address:	<input type="text"/>

**Step 10:** Make up, and enter in the **'Password'** field, a password comprising 4-10 alphanumeric characters, starting with a lowercase letter.

**Step 11:** Verify this password by re-entering it into the **'Verify Password'** field.

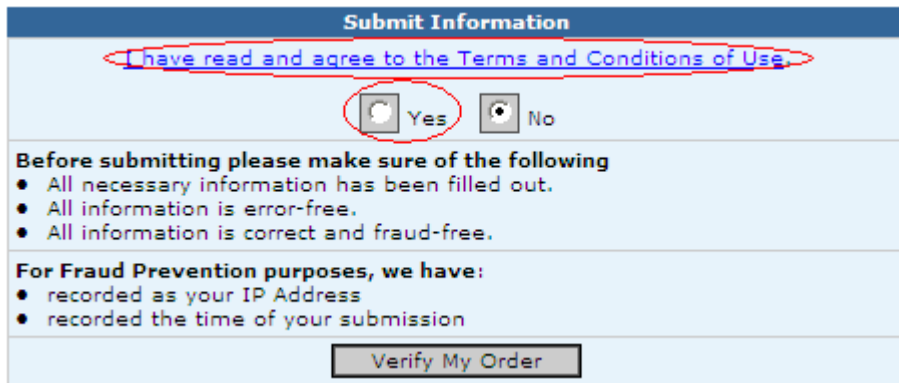
Additional Information	
Referred by:	<input type="text" value="Friend"/>
Password: *	<input type="text"/>
Verify Password: *	<input type="text"/>
(4-10 alphanumeric characters, starting with a lowercase letter)	
Comments:	<input type="text"/>

**Note:** We would appreciate your feedback as to where you heard about Virtual Headquarters, and would like you to choose the appropriate answer from the **'Referred by'** field. Simply click on the drop down menu and choose an option. If it is 'Other' please type the details of how you heard about us in the **'Comments'** field.

Additional Information	
Referred by:	<input type="text" value="Friend"/>
Password: *	<input type="text"/>
Verify Password: *	<input type="text"/>
0 alphanumeric characters, starting with lowercase letter)	
Comments:	<input type="text"/>

## STEPS TO SET UP A FREE TRIAL

**Step 12:** You need to click in the 'Yes' box before your order will be accepted. If you have not already read and agree to the Terms and Conditions of Use, click on the link 'I have read and agree to the Terms and Conditions of Use', to read them.



**Submit Information**

[I have read and agree to the Terms and Conditions of Use.](#)

Yes  No

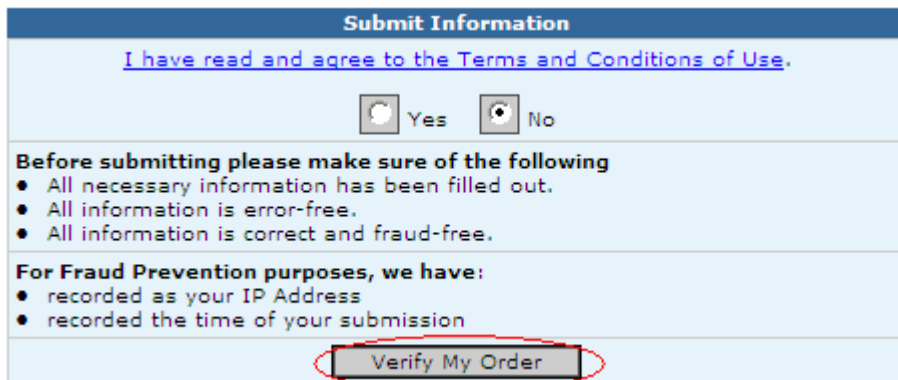
**Before submitting please make sure of the following**

- All necessary information has been filled out.
- All information is error-free.
- All information is correct and fraud-free.

**For Fraud Prevention purposes, we have:**

- recorded as your IP Address
- recorded the time of your submission

**Step 13:** Once you have read and agree to our Terms and Conditions of Use, click the "Yes" box, then click the 'Verify My Order' box.



**Submit Information**

[I have read and agree to the Terms and Conditions of Use.](#)

Yes  No

**Before submitting please make sure of the following**

- All necessary information has been filled out.
- All information is error-free.
- All information is correct and fraud-free.

**For Fraud Prevention purposes, we have:**

- recorded as your IP Address
- recorded the time of your submission

# STEPS TO SET UP A FREE TRIAL

**Step 14:** The next screen shows the details that you have entered. If you need to correct any details, click the **'Correct My Information'** button at the bottom left.

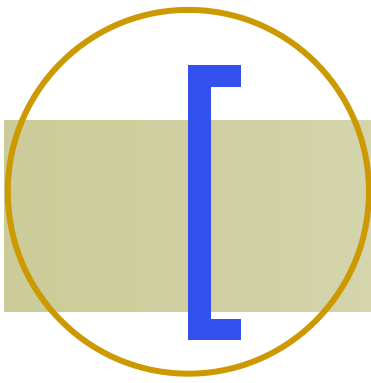
Contact Information	
First Name:*	John
Last Name:*	Citizen
Secondary Contact:	Mary Smith
Company:*	ABC Mortgage Brokers
Role or Title:*	Director
Address:*	10 Smith Street
Address:	
City:*	Smithtown
State/Region:*	NSW
Zip/Postal Code:*	2000
Country:*	AU
Phone:*	0282316888
Fax:	0282316810
Primary Email:*	john@abc.com.au
Web Address:	www.abc.com.au

Additional Information	
Referred by:	Friend
Password:*	abc123
Comments:	

Submit Information	
<a href="#">I have read and agree to the Terms and Conditions of Use.</a>	
Yes	
<b>Before submitting please make sure of the following</b>	
<ul style="list-style-type: none"><li>• All necessary information has been filled out.</li><li>• All information is error-free.</li><li>• All information is correct and fraud-free.</li></ul>	
<b>For Fraud Prevention purposes, we have:</b>	
<ul style="list-style-type: none"><li>• recorded as your IP Address</li><li>• recorded the time of your submission</li></ul>	
<input type="button" value="Correct My Information"/>	<input type="button" value="Process My Order"/>

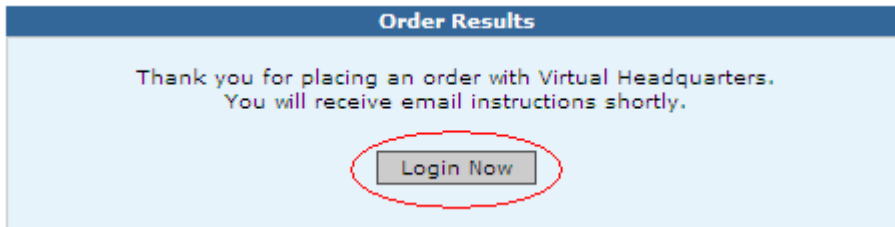
**Step 15:** When all details are correct, click the **'Process My Order'** button at the bottom right.

Submit Information	
<a href="#">I have read and agree to the Terms and Conditions of Use.</a>	
Yes	
<b>Before submitting please make sure of the following</b>	
<ul style="list-style-type: none"><li>• All necessary information has been filled out.</li><li>• All information is error-free.</li><li>• All information is correct and fraud-free.</li></ul>	
<b>For Fraud Prevention purposes, we have:</b>	
<ul style="list-style-type: none"><li>• recorded as your IP Address</li><li>• recorded the time of your submission</li></ul>	
<input type="button" value="Correct My Information"/>	<input type="button" value="Process My Order"/>



## STEPS TO SET UP A FREE TRIAL

**Step 16:** Once you have entered these details, a Confirmation and Login Screen appears. You now need to Login to enter information about your company and messaging options. Click the '**Login Now**' button.



**Step 17:** To activate your Virtual Headquarters Number click on the '**[1]**' to the right of Total Phone Numbers.

**Quick Stats:**

**» Invoice Stats:** [Details](#)

Total Invoices	1	AUD0.00
Total Paid	1	AUD0.00
Total Due	[0]	AUD0.00

**» Misc:** [Details](#)

**Top-up account balance** **AUD 10.00**

Total Phone Numbers **[1] Activate Number(s)**

My Free Trial **Upgrade Now**


Total active affiliate hits. 0

**Support Desk:** [0] New [0] Open

**Step 18:** Click on your Virtual Headquarters **phone number** as shown in the screen below.

[» My Settings](#) :: [My Subscription](#) :: [My Phone Numbers](#) :: [My SMS](#)

**» My Receptionist Numbers**

	Department	Name	Status	Message Status	
 <b>02 6103 0954</b>	-		Inactive		<a href="#">Edit</a>

**» My Fax Numbers**

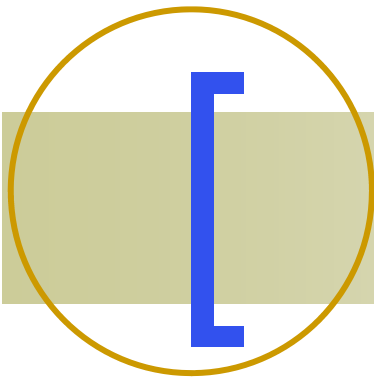
There are no fax numbers to display.

**» My Voicemail Numbers**

There are no voicemail numbers to display.

**» My Divert Numbers**

There are no divert numbers to display.



## STEPS TO SET UP A FREE TRIAL



**Step 19:** The default setting is **'Operator-answered'**, so all you need to do is click the **'Yes'** circle to activate your phone number. Then click the **'Update'** button.

>> Activate Number

Please activate this number to manage service settings.

Please Note: Active numbers incur a charge of \$15.00 per month except for the single number included with your subscription or if you are currently on the Free Trial subscription.

Select service type:  Operator-answered  Fax only

Activate this number?  Yes  No

Update

**Step 20:** Click in the appropriate circles indicating whether you are **Available for Call Transfers** (i.e. our receptionists will call you to introduce the call) **OR** your current status is **Do Not Disturb** (i.e. our receptionists will take a message). Then select how you wish to receive messages (click one circle only). **Note:** you do not have to click the 'Update Status' button when you are entering data for the first time. The 'Update Status' button is only clicked when you change existing data.

Manage settings for: 02 6103 0954

>> Status Settings

My current status:  Available for Call Transfers  Do Not Disturb

Send messages to my:  Email  Mobile (SMS)  Email & Mobile (SMS)

Update Status Cancel

**Step 21:** This is the screen used to enter or update details. Firstly, enter your details in **'Title'** **'First Name'** and **'Last Name'** fields. These are compulsory.

>> Operator Settings

\*Title:

\*First Name:

\*Last Name:

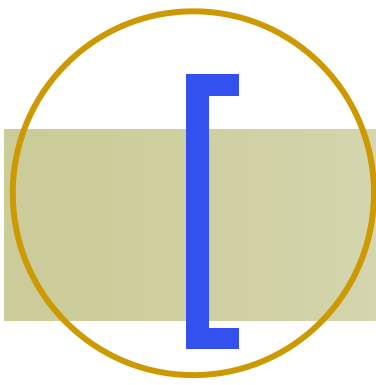
**Step 22:** If you want to, you can enter details into the **'Department'** field (e.g. Sales, Marketing, Owner etc.)

Department:

**Step 23:** Write a script as to how you want the phone to be answered and enter it into the **'Operator Greeting'** field. Type your greeting in **CAPITAL LETTERS**. You don't need to write Morning or Afternoon (just type ..... ) as our receptionists answer appropriately depending on what time of day your call is received. For example a typical greeting might be written as: GOOD....., ABC COMPANY, HOW MAY I HELP YOU?

\*Operator Greeting:

GOOD.....VIDEO PRODUCTIONS, HOW MAY I HELP YOU?



## STEPS TO SET UP A FREE TRIAL



Note: When entering phone numbers into any field, don't leave spaces in between the numbers.

**Diversion Numbers:** If your current status (from Step 20) is "Available for Call Transfers" your receptionist will call you on your Diversion Number/s to introduce calls.

**Step 24:** In the '**1<sup>st</sup> Diversion Number field**', enter the phone number you wish to be contacted on.

**Step 25:** In the '**2<sup>nd</sup> Diversion Number field**', enter another phone number as a 2nd choice. If your receptionist cannot reach you on your 1<sup>st</sup> Diversion Number she can try your 2nd number (you may not want to use this)

**Step 26:** In the '**3<sup>rd</sup> Diversion Number field**', enter the phone number as third choice of contact (you may not want to use this).

**Diversion Numbers:**

1<sup>st</sup>  2<sup>nd</sup>  3<sup>rd</sup>

**Step 27: Additional Notes for the Operator.** In this field type in any detail which will assist your receptionist in handling calls professionally, the way YOU direct (e.g. a brief business description in case a caller asks what your business does or maybe instructions on how to handle calls where people ask for an ex staff member).

**Additional Notes for Operator:**

**Step 28: Optional: Physical Address & Directions.** In this field you can enter details which will allow your receptionist to give callers directions to your business or simply where to send mail. For example, the nearest train station, whether your building has casual parking etc.

**Optional: Physical Address & Directions** N.B. Applies to *all* your Receptionist numbers.

**Step 29:** The '**Mobile Number for SMS notifications**' field is compulsory **IF in Step 20 you elect to receive messages via SMS**. Enter a mobile number. Note you can enter multiple SMS numbers, using a comma to separate each.

**Step 30:** The '**External Number for Voicemail transfer**' is not compulsory. This is the number callers will be transferred to if they dial 1 after calling your number after hours (i.e. outside Mon -Fri 9am—5.30pm). That way you become the live receptionist outside normal business hours (unless you select our 24x7 package).

**Step 31:** The '**Email for Messages / Voicemail:**' field is compulsory. Enter your email address. Note that you are able to enter multiple email addresses, using a semicolon to separate each.

» Message Forwarding Settings

\*Mobile Number for SMS notifications:  **External Number for Voicemail transfer:**  [\[Help\]](#)

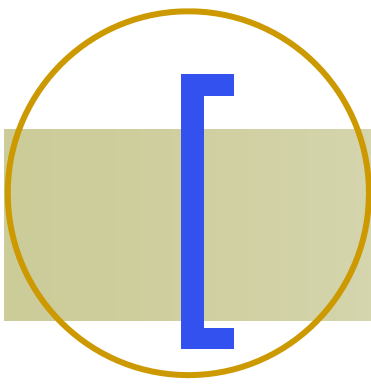
Multiple recipients may be specified - separated by a comma.

\*Email for Messages / Voicemail:  \*Voicemail PIN (4 digits):

Multiple addresses should be separated with a semicolon (;).

**Step 32: Make a note of your 4 digit PIN number.** This will be required to record or change your after hours greeting in Step 34. You are able to change your PIN, simply type a new 4 digit number into the field.

\*Voicemail PIN (4 digits):



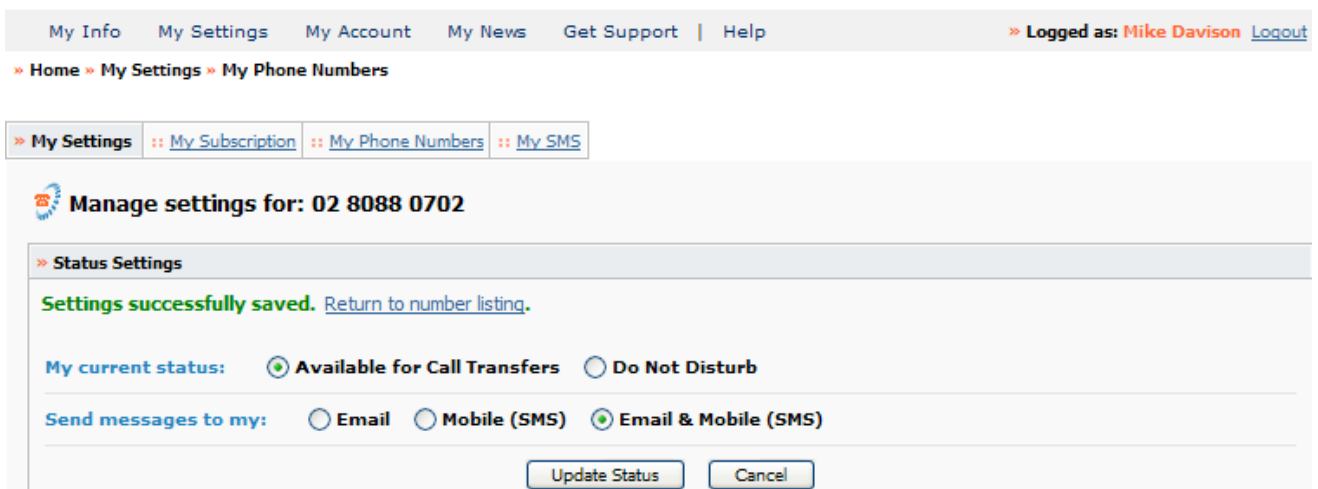
## STEPS TO SET UP A FREE TRIAL



**Step 33:** Click the **Save Changes** button.



If you have correctly entered the mandatory fields in your settings you will receive the message “**Settings successfully saved**” under the Status Settings heading as per the screen shot below.



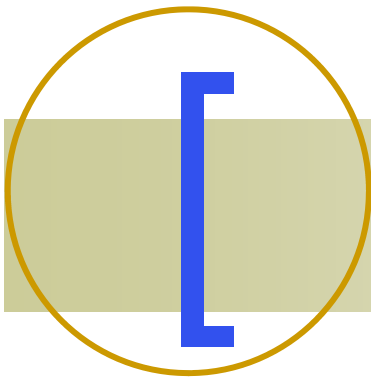
Congratulations! You are now ready to receive calls and have them handled by our receptionists.

You can now logout. Simply click **Logout** in the top right of the above screen to the right of your user name.

**Step 34: After Hours Greeting:** (i.e. if you don't have our 24 x 7 service) For that totally professional image, you will need to record an '**After Hours Greeting**' for when customers phone you outside of normal business hours (i.e. outside 9am—5.30pm Mon—Fri). If you would like one of our receptionists to record the greeting for you, just email us with the script.

### **Recording your Custom Voicemail Greeting for After Hours calls (and/or public holidays etc)**

- Dial into the Virtual Headquarters voicemail system on (02) 8088 0766
- Enter your Virtual Headquarters phone number including area code (from Step 5) with no spaces in between
- Enter your PIN code (from Step 32)
- Follow the prompts to record your greeting (1 to save, 2 to listen, 3 to record or re-record)




## MANAGE YOUR SETTINGS



### Managing your Settings via the Virtual Headquarters Customer Portal

Our Customer Portal has been designed for your convenience allowing you and each staff member to log into your account at any time to:

- change a staff member's availability (e.g. Available for Call Transfer, Do Not Disturb)
- add notes for our receptionists
- view your usage (every phone interaction, message sent etc. is available on line in real time)
- view your invoices
- pay your account online
- change your password
- update your credit card details
- update or change details in your Client Information page

Please log in to your account by clicking on the Customer Login icon  **Customer Login** in the top right corner of our site [www.virtualheadquarters.com.au](http://www.virtualheadquarters.com.au)

**Enter your email address:** as per step 7  
**Enter your password:** as per step 11

At **My Settings** select **My Phone Numbers** then select (click) the appropriate **Phone Number** or **Edit**.

You are now in your **Manage Settings** page for that particular Staff Member.

In **Status Settings My current status** you are able to switch your status between **Available for Call Transfer** and **Do Not Disturb** as required.

Directly underneath you will see **Operator Settings**. You can change your **Operator Greeting** if you wish and add additional notes for our Receptionists under **Additional Notes for Operator**.

At **Message Forward Settings** you can amend as required your mobile number or email address. Remember numerous mobile numbers can be entered in the "Mobile Number for SMS Notifications" field separated by a comma and numerous email addresses can be entered in the email field separated by a semi colon.

Please always remember to click on the **Save Changes** button located at the bottom of the page.