

Configure the Auto Attendant

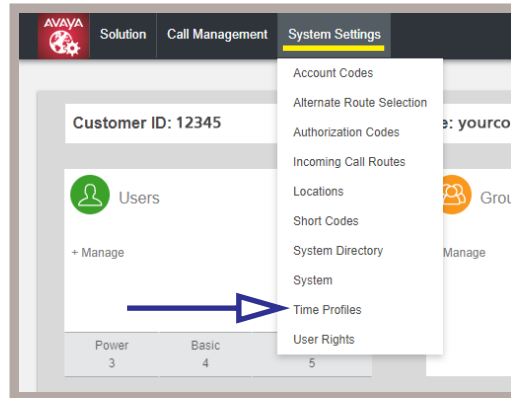
I WOULD LIKE TO...

The Auto Attendant greets incoming callers and presents them with a menu of options to choose from.

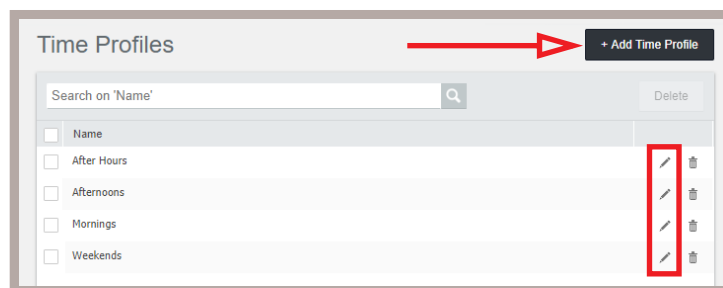
Before you can configure the Auto Attendant, you must setup one or more Time Profiles for your company. The Auto Attendant will use these profiles to determine the correct message to play depending upon the time of day, and the day of the week.

CREATING A TIME PROFILE

- Launch Web Manager and login using Customer Administrator credentials.
- Open the **System Settings** tab and click **Time Profiles**.



- Click **+Add Time Profile**, or click the **Edit** icon  beside an existing profile.



- Give this configuration a name, and select **Timed Operation** from the **Manual Override** dropdown menu. Click **+Add Time Profile Entry**.

Time Profile | After Hours
yourcompany

Name
After Hours

Manual Override
Timed Operation

Time Entry List

Start Time	End Time	Recurrence
17:00:00	8:00:00	Monday,Tuesday,Wednesday,Thursday,Friday

- Set whether this is to be an ongoing schedule (**Recurrence pattern = Yes**) or not. Select a **Start Time** and **Stop Time** for this entry. You can manually type in any value that is not on the dropdown menu (e.g. 12:15). Choose which days of the week this profile will be used. When finished, click **OK** to add this entry to profile.

Recurrence pattern

Recurrence pattern YES

Start Time
08:00

End Time
17:00

Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday

OK Cancel

- Repeat as necessary to build up a complete list of your company operating hours. Make sure that you have effectively covered both the hours that you are closed as well as the hours you are open. Build a single profile with entries that cover your entire week, or break it into individual chunks to make management easier (mornings, afternoons, evenings, weekends, etc.). Each unique greeting requires its own unique Time Profile. This allows your system to react appropriately at any time of the day, any day of the week.

Time Profiles

+ Add Time Profile

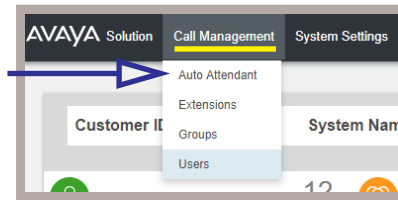
Search on 'Name' [Q] [Delete]

Name	Delete
<input checked="" type="checkbox"/> After Hours	[Edit] [Delete]
<input type="checkbox"/> Afternoons	[Edit] [Delete]
<input type="checkbox"/> Mornings	[Edit] [Delete]
<input type="checkbox"/> Weekends	[Edit] [Delete]

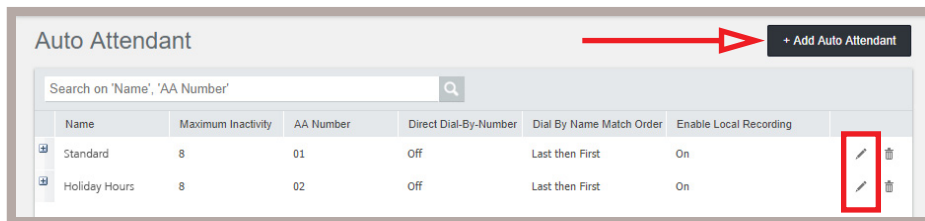
Note: A single Time Profile can contain multiple Entries.

CONFIGURE THE AUTO ATTENDANT

- Launch Web Manager and login using Customer Administrator credentials.
- Open the **Call Management** tab and click **Auto Attendant**. The currently configured attendants are shown.



- Click **+Add Auto Attendant**, or click the **Edit** icon  beside an existing one.



- This panel allows you to apply a time profile and attach greetings that cover your corporate schedule.

A screenshot of the 'Edit Auto Attendant' configuration page for the 'Standard' attendant. The page is divided into several sections: 'SETTING GROUPS' (Auto Attendant, Actions), 'BASIC SETTINGS' (Name: Standard, Maximum Inactivity: 8, Direct Dial-By-Number: NO, Enable Local Recording: YES, Dial By Name Match Order: Last then First, AA Number: 01), 'MORNING' (Time Profile: Mornings, Recording Name: Good Morning, Dial To Record Greeting: *8101), 'AFTERNOON' (Time Profile: Afternoons, Recording Name: Good Afternoon, Dial To Record Greeting: *8201), 'EVENING' (Time Profile: After Hours, Recording Name: Sorry We're Closed, Dial To Record Greeting: *8301), and 'MENU OPTIONS' (Recording Name: It's the Weekend, Dial To Record Greeting: *8401). Each greeting section has an 'Upload Greeting' button. At the bottom, there are 'Update' and 'Cancel' buttons.

Basic Settings

Name: Give this auto attendant configuration a name.

Maximum Inactivity: Configure how many seconds the auto attendant should wait for a valid entry after playing a prompt. If this time is exceeded, the caller is transferred to the Fallback Extension (if configured within the Incoming Call Routing), or the call is disconnected.

Dial By Name Match Order: Determines the name order used for the Dial by Name function (**First-Last** or **Last-First**).

Direct Dial-By-Number: This affects entries in the auto attendant menu that use Dial By Number (see [Configure Actions](#)).

Enable the feature to include the key press as part of the number being dialed. For example, if the Dial By Number action is on key 2, pressing 201 will connect you to extension 201.

If this is disabled, you must hit the Dial By Number button followed by the full extension. For example, press 2, then extension 201.

Enable Local Recording: When turned off, the use of short codes to record auto attendant prompts is blocked. Short codes can still be used to playback greetings.

Morning, Afternoon and Evening

These categories are used to tell the Auto Attendant how to react to incoming calls depending upon the time of day and the day of the week.

The titles Morning, Afternoon and Evening are simply labels and do not correspond to the time of day they are active. It is the Time Profile that is used to determine schedules. You must configure a new category for each different message you want played. For example, one category covers your office hours with an appropriate greeting, and a second category is used for when you are closed. A third might be used for weekends.

It is not necessary to use all 3 categories.

Note: If time profiles overlap, Morning will be used before Afternoon, and Afternoon will be used before Evening.

- For a category, select a Time Profile from the dropdown menu.
- Enter a name for the greeting that is applied to this category.
- Click **Upload Greeting** to add a recording in a WAV formatted audio file. If you do not have a pre-existing audio file on your drive, you can record one using your desktop telephone. Dial the short code that corresponds to the category you want to record. For example, the default code to record a greeting for the Morning category is ***8101**. Follow the prompts on your phone to record the greeting.

Menu Options

This is used to specify the recording played when someone calls in. It plays after the main company greeting configured above.

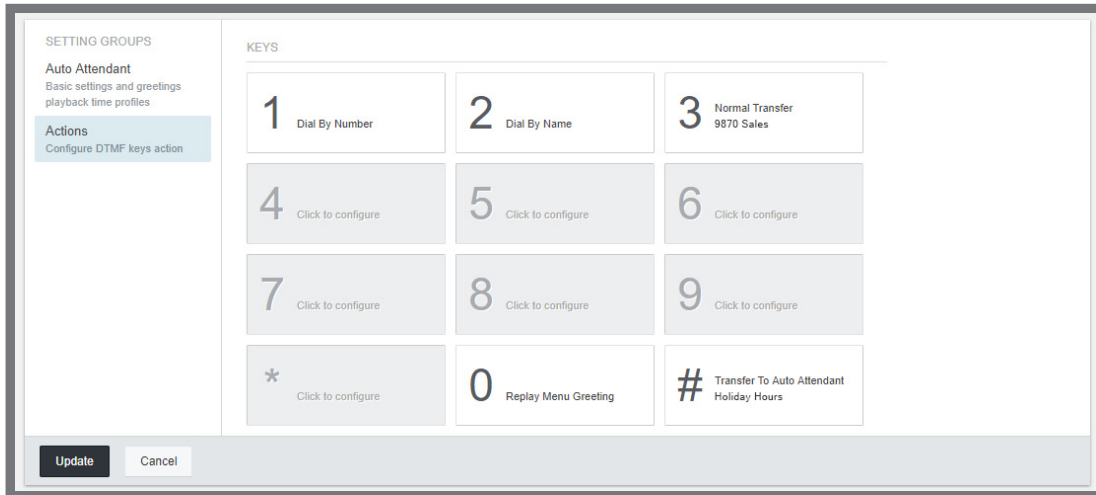
This recording relates to the number pad and the actions assigned to each key, such as “Press 1 for Sales, press 2 for Production, press 3 to dial by name...” etc.

- Give the recording a name.
- Upload your greeting from a WAV file, or use the short code to record a new greeting using your desktop telephone.

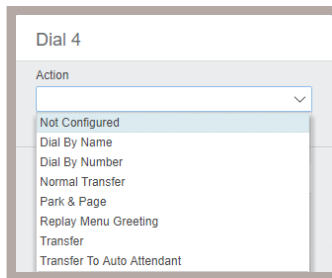
When all changes have been made, click the **Update** button.

CONFIGURE ACTIONS

Use the Actions tab to program the telephone user interface. One function can be assigned with each key, and not all keys must be programmed.



- Click any button to program an Action for it.
From the dropdown menu, select action to apply to this button.



Dial By Name: This action will prompt the caller to enter the name of the person they want to reach, followed by the # key. They will be prompted to choose from a list of possible matches, and they will be connected to the chosen individual. Names must be entered in the order specified by the [Dial by Name Match Order](#) option.

Dial By Number: Callers select this option to enter the number of the person they want to speak to.

Note: To use this option, all extension numbers must be of the same length (i.e. 4 digits).

Normal Transfer: This action can be specified with or without a destination. If no destination is entered, the caller will be prompted to enter one as they do with Dial By Number. If a number is specified, the call will be passed to that extension.

Park & Page: If a caller selects this action, the system will put them on hold, and then page, playing the recorded message. If the page is not answered after the chosen number of retries, the call will be transferred to the Fallback Number.

The image shows a configuration form titled "Dial 7". The form is set to the "Park & Page" action. It includes the following fields and controls:

- Action:** A dropdown menu currently showing "Park & Page".
- Park Slot Prefix:** An empty text input field.
- Paging Number:** A dropdown menu currently showing "Select...".
- Retry Count:** A numeric input field with a value of "0" and up/down arrow controls.
- Retry Timeout:** A numeric input field with a value of "0:15" and up/down arrow controls.
- Fallback Number:** An empty text input field.
- Page Prompt:** A section containing a "Recording Name" text input field.
- Dial To Record Greeting:** A text input field containing the value "*80701".

At the bottom of the form are two buttons: "Save" (highlighted in black) and "Cancel".

Replay Menu Greeting: Replays the auto attendant greeting.

Transfer: The call is passed to the specified extension.

Transfer to Auto Attendant: With this action, the call is passed to another Auto Attendant that has been configured on the system, such as may be used when multiple companies share a telephone service.

When all changes have been made, click the **Update** button.