

# Auto Attendant

## Feature Overview

Delivering a professional first impression is critical for all businesses, large or small. One way to achieve this with a phone system solution is to make sure every call is answered in a timely manner.

The Auto Attendant serves as a receptionist that answers the phone and routes calls to various destinations, employees within your company, and specific groups of employees, voice mail, or other outside numbers. They provide callers with your company greeting and dialing menu options. Each Auto Attendant is assigned a unique 10-digit number for identification and setup purposes.

- The Auto Attendant has two modes – one for business hours and one for after-hours. Each mode allows administrators to set up options 1–9, #, and \* to present callers with different options from which to select. To route callers to another set, or branch of options – an additional Auto Attendant must be assigned to your account. To order an additional Auto Attendant, please contact your Account Manager.
- To route calls based on the time of day (e.g., after-hours versus traditional business hours), you must configure an Auto Attendant schedule. You can also configure a company holiday schedule to identify the dates of holidays your company recognizes. On designated holidays, the after-hours greeting and menu dialing options are played to callers.
- If you require a unique message, greetings may be uploaded to the My Account Web Portal as a .wav file or recorded from the Voice Portal.
  - For instructions on how to record your Auto Attendant greetings from the Voice Portal, please reference the Voice Portal Quick Reference Guide
  - All greetings must be formatted as CCIT u-Law 8.000kHz, 8 bit Mono .wav with a maximum file size of 2000 KB or about 4 minutes of recording

The Auto Attendant uses two schedules – a “business hours” and “holiday” schedule – to determine whether to apply Auto Attendant options defined for the business hours mode or after-hours mode. During a holiday schedule, callers will be routed based on After Hours settings. To learn how to manage the Auto Attendant’s Time Schedules, please reference the Schedule Quick Reference Guide.

To run the same greeting at all times of the day (i.e. one mode 24/7), you do not need to modify your site schedules. When you configure the Auto Attendant:

- Configure your AA settings so each keypad has the desired action assigned to it. When you assign each action in Keypad settings, check the “Duplicate for after-hours” radio button for each keypad.
- Ensure you have the desired Business Hours and After Hours AA greetings uploaded. If you want the same greeting at all times, upload the same greeting to both locations.

Group administrators can fully configure the Auto Attendant to meet the specific needs of their organization. Configurable options include:

### **Allow/Disallow Direct Extension Dialing**

- Provides ability for callers to dial a known extension at any time to connect with the user, without requiring additional prompts

### **Enterprise Wide or Site Specific Dialing Options**

- Refines the list of available users and extensions to include with the Internal dialing options

### **Schedule**

- Defines Days/Hours for normal business operations, as well as holidays. Supporting distinct greeting messages and routing actions for Business Hours vs. After Hours

### **Routing Actions**

#### **Not Used**

The default when an action has not been selected for that digit or character.

#### **Transfer to External Number, with or without prompt**

Routes callers to a configured phone number that is not a user or extension within the company.

#### **Transfer to Operator**

Routes callers to a configured operator. The designated operator will receive all calls that time out if the caller does not choose an option from the Auto Attendant.

#### **Dial by Name**

Enables callers to dial by a recipient's name.

#### **Dial by Extension**

Enables callers to dial by a recipient's extension.

#### **Repeat Menu**

If selected, this option will repeat the greeting and menu options.

#### **Exit Menu**

Allows a caller to exit the menu system. This will terminate the call.

#### **Transfer to Voice Mail**

Routes callers directly to the voice mailbox of the extension entered in the Transfer To field.

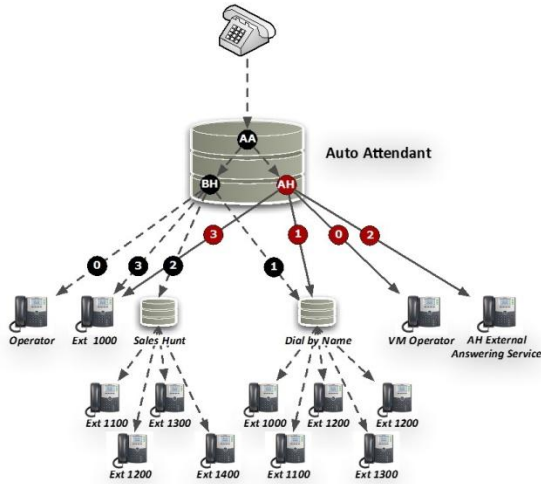
#### **Transfer to Internal Number, with or without prompt**

Routes callers to any user's phone number within the company. Optionally, you can elect to play a message prompt before the transfer is placed. This message is the playback of the user's name as recorded in the voice mailbox.

#### **Transfer to Extension, with or without prompt**

Routes callers to a configured extension. Optionally, you can elect to play a message prompt before the transfer is placed. This message is the playback of the user's name as recorded in the voice mailbox.

## Auto Attendant Example



1. A call is received into the Auto Attendant (AA) phone number,
  2. The Auto Attendant (AA ) answers the call and plays the appropriate greeting based on the time of day – Business Hours (BH) or After Hours (AH),
  3. Caller then makes a selection by entering digits on their phone
- Business Hours
    - Rings Operator
    - Accesses Dial by Name directory
    - Rings Sales teams Hunt Group
    - Rings to specific extension
  - After Hours
    - Routes to Operator's voice mail
    - Accesses Dial by Name directory
    - Rings third-party Answering Service

## Feature Prerequisites

Before the Auto Attendant service can be used the following conditions must be met:

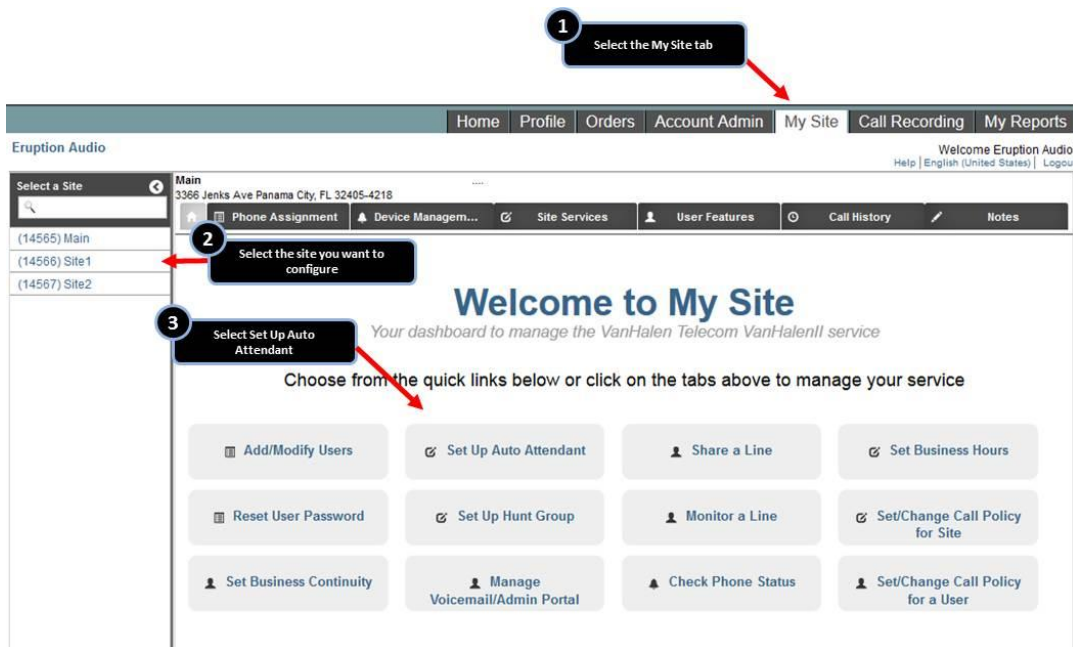
- At least one 2-way DID must be assigned to the Auto Attendant and it must be active
- The Business Hours routing options greeting must be established

## Feature Setup

Prior to using the Auto Attendant service, the Site administrator must set up the Auto Attendant Call Flow and Greetings for the callers to navigate through. Once logged into My Account, simply follow the steps detailed below.

### Step 1: Set Up Auto Attendant

1. Go to My Site
2. Select the appropriate Site to configure
3. Select “Set Up Auto Attendant”



You can also get to the Auto-Attendant settings through the Site Services menu:

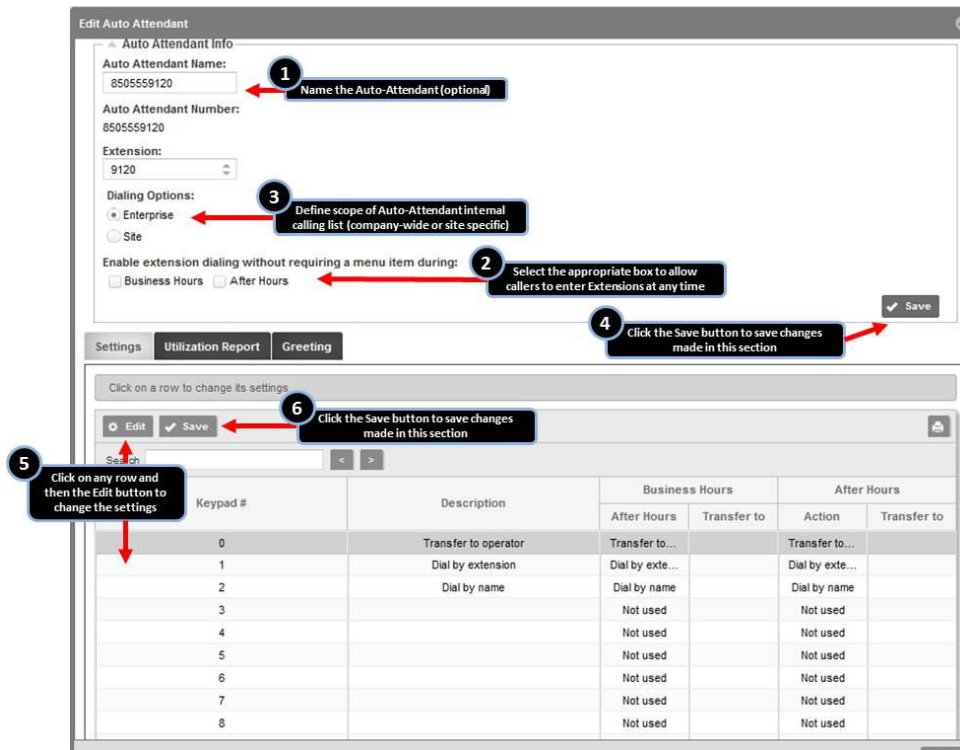
1. Go to My Site
2. Select the “Site Services” tab
3. Select “Auto Attendant”

## Step 2: Select the Auto Attendant to Configure



1. Select the Auto Attendant to be configured. If you have a large list of them, you can also search.
2. Click the Edit button to open the configuration window

## Step 3: Configure the Auto Attendant



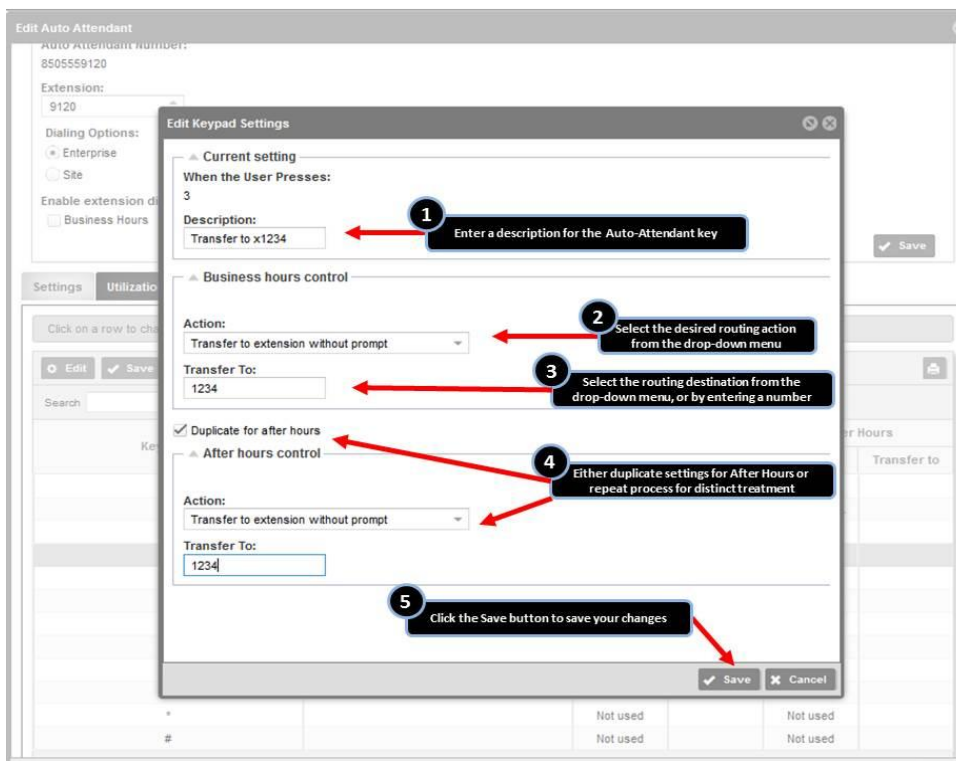
By default, the phone number assigned to the Auto Attendant will be displayed in the Auto Attendant Name field.

1. Replace the default number by entering a name for your Auto Attendant. Create a name that reflects the purpose of this specific auto attendant, e.g. "Main Line Auto Attendant." This is recommended but not mandatory. If desired, modify the Extension assigned to the Auto Attendant.
2. Select this checkbox to enable or disable extension dialing without selecting a menu item. This feature, when enabled, allows callers to reach users by dialing their extension anytime during the Auto Attendant greeting. This can be enabled or disabled for business hours, after-hours, or both.
3. Select the Dialing Options.
 

Enterprise: If this option is selected, callers who reach the Auto Attendant and choose to dial by name or extension will be able to reach any user at any location within the entire company.

Site: If this option is selected, callers who reach the Auto Attendant and choose to dial by name or extension will be able to reach any user located at the specific site associated with this Auto Attendant.
4. Click on the Save button to save changes made in this section.
5. Click on any row and then the Edit button to change the settings for that keypress. This will open a pop-up window to edit those settings. See the Edit Keypad Settings section below.
6. Click on the Save button to save changes made in this section

#### Step 4: Configure the Auto Attendant (Edit Keypad Settings)



## 7. Description

Enter text describing the location you would like the caller to reach when they press the corresponding number on their keypad. This will appear in the Description field to easily identify what you have the key configured to do.

## 8. Select the action from the drop-down menu.

Action options include:

### **Not Used**

The default when an action has not been selected for that digit or character.

### **Transfer to External Number, with or without prompt**

Routes callers to a configured phone number that is not a user or extension within the company.

### **Transfer to Operator**

Routes callers to a configured operator. The designated operator will receive all calls that time out if the caller does not choose an option from the Auto Attendant.

### **Dial by Name**

Enables callers to dial by a recipient's name.

### **Dial by Extension**

Enables callers to dial by a recipient's extension.

### **Repeat Menu**

If selected, this option will repeat the greeting and menu options.

### **Exit Menu**

Allows a caller to exit the menu system. This will terminate the call.

### **Transfer to Voice Mail**

Routes callers directly to the voice mailbox of the extension entered in the Transfer To field.

### **Transfer to Internal Number, with or without prompt**

Routes callers to any user's phone number within the company. Optionally, you can elect to play a message prompt before the transfer is placed. This message is the playback of the user's name as recorded in the voice mailbox.

### **Transfer to Extension, with or without prompt**

Routes callers to a configured extension. Optionally, you can elect to play a message prompt before the transfer is placed. This message is the playback of the user's name as recorded in the voice mailbox.

## 9. Enter the destination to which the call should be transferred.

This only applies if the Transfer to Internal Number, Transfer to External Number, Transfer to Extension, Transfer to Operator, or Transfer to Voice Mail options are selected.

## 10. Either duplicate settings for After Hours or repeat process for distinct treatment

## 11. Click "Save" to save the settings.

### Step 5. Review the Auto Attendant Settings and Load Greeting

1 Click on Greeting to set greeting message

Auto Attendant Info

Settings Utilization Report Greeting

Click on a row to change its settings

Edit Save

Search

Keypad #	Description	Business Hours		After Hours	
		After Hours	Transfer to	Action	Transfer to
0	Transfer to operator	Transfer to...		Transfer to...	
1	Dial by extension	Dial by exte...		Dial by exte...	
2	Dial by name	Dial by name		Dial by name	
3		Not used		Not used	
4		Not used		Not used	
5		Not used		Not used	
6		Not used		Not used	
7		Not used		Not used	
8		Not used		Not used	
9		Not used		Not used	
*		Not used		Not used	
#		Not used		Not used	

Page 1 of 1 Records per Page Clear Filters Displaying 1 - 12 of 12



## Step 6. Load Auto Attendant Greeting

Settings Utilization Report Greeting

Show/hide panel by clicking triangular button

How to record your personalized auto attendant greetings via phone

1. Dial your voice portal number: (281) 555-7416
2. If initially prompted to enter your passcode, press \* to return to the enter mail box ID prompt.
3. At the enter mail box ID prompt, enter the Voice Portal extension followed by #.
4. At the enter passcode prompt, enter the Voice Portal administrator passcode followed by #.
5. Press 1 to change Auto Attendant greetings.
6. Press 1 for Business Hours or press 2 for After Hours(After Hours) to change the Auto Attendant Greeting.

Show Sample Scripts

1 If recording a greeting via your phone, follow the listed steps

2 Click on "Show Sample Scripts" to see a basic Greeting script based on the AA settings

How to upload your prerecorded personalized auto attendant greetings

File Format: CCITT u-Law 8.000 kHz, 8 bit Mono WAV file.

1. Create auto attendant recording (see sample scripts that are based on your configuration)
2. Save file to your local machine.
3. Use the default description or change it.
4. Click on the upload button.
5. Find the saved .WAV file and select it.
6. Click the "Open" button.

3 To upload the Greeting, record the Greeting in the defined format

Update greetings

Business Hours:

Default

Custom

File Name: no file - using system default

After Hours:

Default

Custom

File Name: no file - using system default

4 Once recorded, click on the appropriate button to select and upload the recorded greeting

Cancel

**NOTE:** For greeting files to properly upload, they must be saved as a .wav file in CCITT u-Law with 8.000 kHz, 8-bit Mono attributes. Using a basic sound converter will allow you to save your .wav file in this format.

## Reporting

In addition to providing the automated answer and routing solution, the Auto Attendant delivers call activity metrics allowing for greater visibility into historical call volumes and route choices. The metrics are reported using requested time periods. These include the following:

### **Auto Attendant Stats**

#### **Destinations**

Phone numbers to which the Auto Attendant has routed calls

#### **Key**

Auto Attendant Menu Key option related to phone number (if applicable)

#### **Description**

Auto Attendant Menu Key Description related to phone number (if applicable)

#### **Answered**

Total number of calls answered by user

#### **Busy**

Total number of calls that received Busy treatment after being routed to user

#### **Not Answered**

Total number of calls not answered by user

#### **Other**

Total number of calls falling outside the previous three categories of treatment. These would include transfers, routing to a voice mail station or routing to another auto attendant, queue or hunt group, etc.

#### **Total Calls**

Total number of calls routed to a specific phone number by Auto Attendant

#### **Duration**

Total number of minutes of active conversation via the Auto Attendant

CALL AUTO ATTENDANT

Extension: 9120

Dialing Options:  
 Enterprise  
 Site

Enable extension dialing without requiring a menu item during:  
 Business Hours  After Hours

Save

Settings Utilization Report Greeting

Utilization Report Filter

Total received calls: 0

Duration: 0

Start Date: 04/01/2014

End Date: 04/30/2014

Generate Report

Utilization Report

Report View Type:  
 Table  
 Chart

Search

Destinations	Key	Description	Answered	Busy	Not Answered	Other	Total Calls	Duration(mins)
0			0	0	0	0	0	0

Page 1 of 1 Records per Page 10 Clear Filters Displaying 1 - 1 of 1

\*Keys with a letter (B or A) signify the hour configurations (B = Business hours & A = After hours)

Cancel

Settings Utilization Report Greeting

Utilization Report Filter

Total received calls: 0

Duration: 0

Start Date: 04/01/2014

End Date: 04/30/2014

Generate Report

Utilization Report

Report View Type:  
 Table  
 Chart

Values

Metrics

data

Cancel

All reports are available online via MyAccount>MyReport.