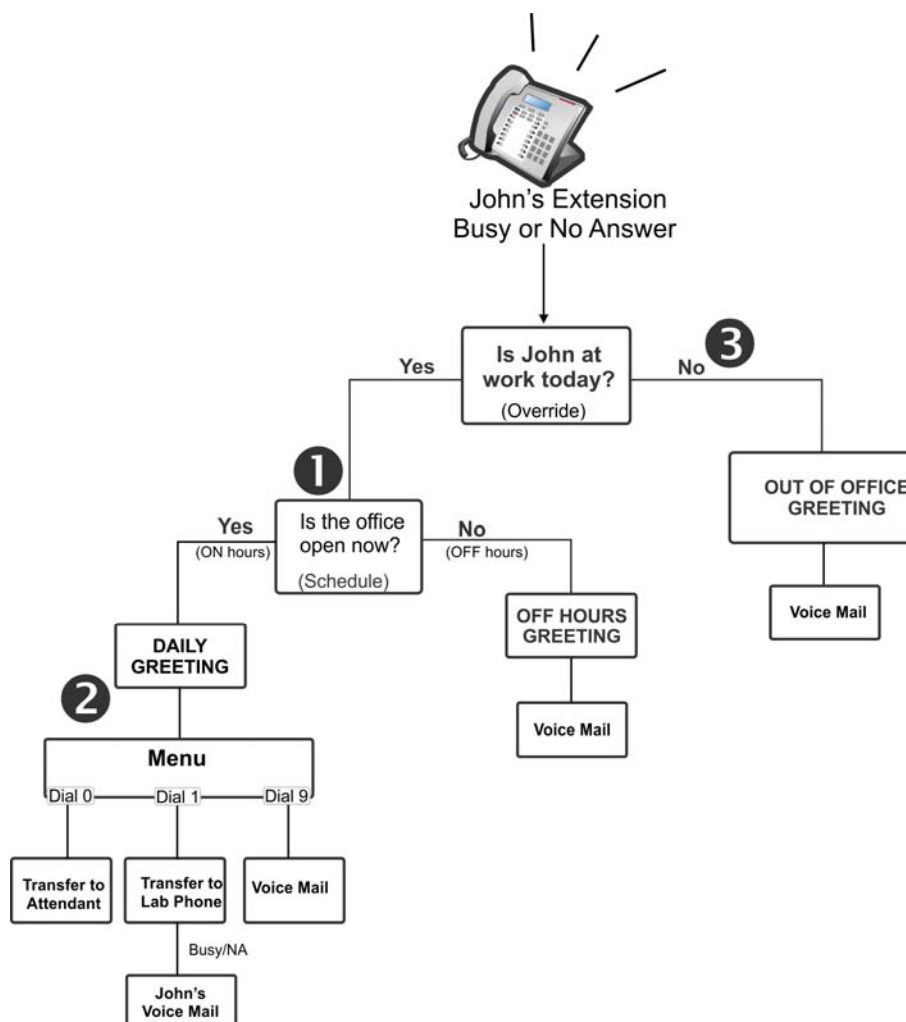


Tutorial 1 – Creating a Personal Call Flow

This tutorial walks you through the creation of a personal call flow for John, a technician at ACME Widgets. John's requirements are typical of most office workers. With a few simple changes, you could easily adapt his call flow for your own use.

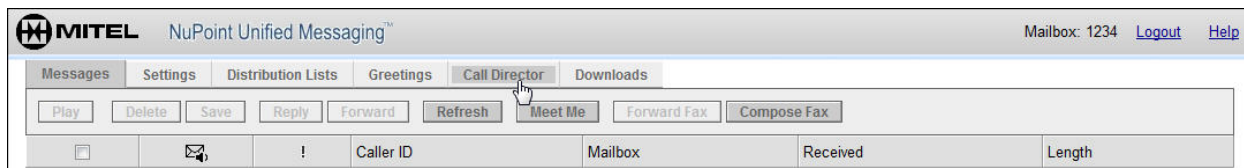
John's Call Flow Requirements

1. He wants all his calls to ring his extension during normal working hours, Monday through Friday. After hours and on weekends, all calls should go to his mailbox.
2. When he's on the phone or not answering, he wants callers to hear his greeting and menu options. His menu options prompt callers to press keys to be transferred to the attendant or to his mailbox where they can leave him a message. John is sometimes at a lab in a different part of the building. A third menu option allows callers to try to reach him there.
3. If he's temporarily away due to illness or some other unusual circumstance, callers should hear his "out of office" greeting. After the greeting plays, callers should have the option of leaving a message in his mailbox. Here is a visual representation of John's planned call flow:



Programming the Call Flow

Log in to the Web View interface using any mailbox and passcode you have set up in previous labs. Click **Call Director**.



Lesson 1: Programming an Override

An **Override** changes the everyday call flow to handle unusual circumstances, such as an absence due to illness or vacation. John wants his Override to play a greeting that informs callers that he's out of the office. After the message plays, callers can leave him a message.

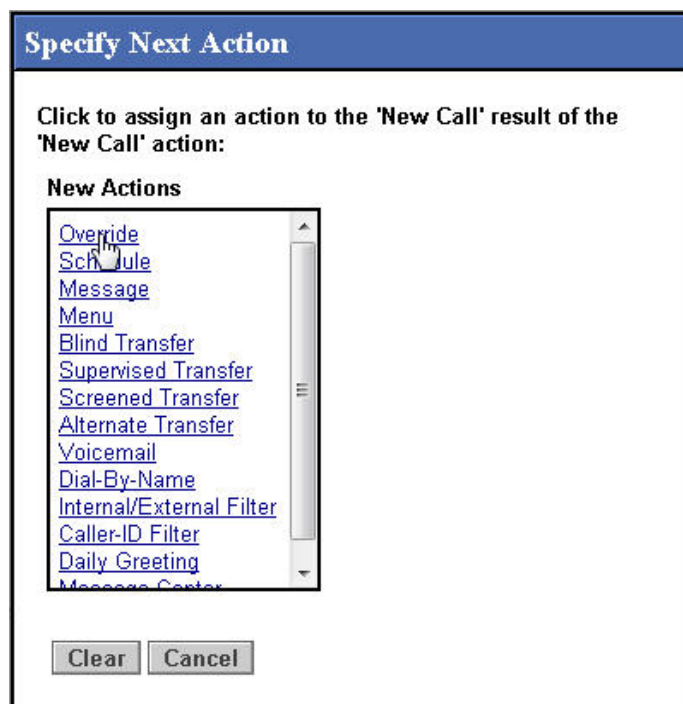
When John enables **Override** (either in Call Director or by telephone), it temporarily supersedes the remaining actions in his call flow.

To define an Override:

1. In the **Results area** for the New Call, click **Message Center**. (The default handling for all new call flows is to go to the Message Center.)

Results for <i>New Call</i>	
Result	Destination Action
New Call	Message Center

The New Actions menu appears:



- Click **Override**. The Override action is added to the call flow:



Checking the planning diagram, we see that when the override is **Enabled**, John's "Out of Office" message should play, and then callers should be sent to voice mail.

- In the Override properties, click the Message Center action beside **Enabled** to see the list of available actions.

Over-Ride Properties		Results for <i>Override</i>	
Name: Override *		Result	Destination Action
Action Id: 001		Disabled	Message Center
Over-Ride Enabled: <input type="checkbox"/>		Enabled	Message Center
Note: You can enable and disable this action by dialing into your mailbox and pressing the * key. Then follow the instructions. You will need the Action ID mentioned above.		From Call Flow	Unassigned
		Extended Absence	Unassigned

Tip: When call flow programming is complete, you can enable the Override call flow from this screen, or you can dial into your mailbox and press the * key and passcode. Follow the prompts to enable/disable the override. (If you have multiple overrides, you'll need to know the Action ID number.)

- In the New Actions list, click **Message**. To distinguish this message from other messages in the call flow, give it a unique **Name** and include the Recording number (Action ID) for ease of future maintenance (for example, "Out of Office Msg - ID 002"):

Message Properties	
Name: Out of Office Msg *	
Delay: 0 *	
Suppress Hangup Prompt: <input type="checkbox"/>	
Action Id: 002	
Message: Recording Not Recorded	

Don't worry about recording the message right now – you can record all messages when the call flow is complete.

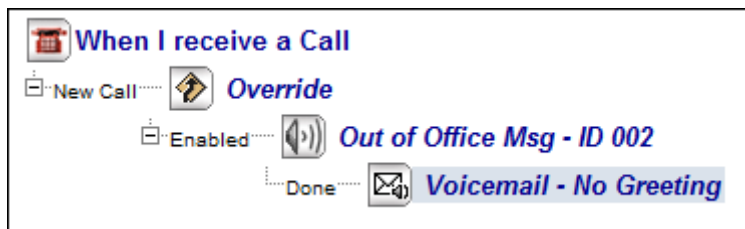
- When the Out of Office message has finished playing, John wants callers to be transferred to voice mail. In the Actions window, beside Done, click the Hang up action.

Results for <i>Message</i>	
Result	Destination Action
Done	Hang up

6. In the Actions menu, select **Voicemail**. The Voicemail action is added to the call flow. In the properties section, no programming is required because the default settings send the call to John's own mailbox (5209).
7. To avoid playing John's voice mail greeting right after playing his Out of Office message, click **Suppress Greeting**.
8. In the **Name** field, type "Voicemail – No Greeting". John can re-use this action anytime he needs the voice mail action with suppressed greeting.

9. Click **Save**.

John's call flow should look like this:



Lesson 2: Setting up a Weekly Schedule

When the Override is **Disabled**, it means that no unusual circumstances are in effect and John is present at work during normal working hours. When he's on the phone or not answering, he wants callers to hear his greeting and then to be offered a menu. Evenings and weekends, John wants callers to hear his off-hours greeting and be able to leave a message if they want.

To set up a schedule:

1. In the Call Flow area, click **Override**.



2. The Override properties are displayed.

Results for Override	
Result	Destination Action
Disabled	Message Center
Enabled	Message: Out of Office Msg - ID 002
From Call Flow	Unassigned
Extended Absence	Unassigned

3. Click the [Message Center](#) action next to **Disabled**. From the New Actions menu, click **Schedule**. The Schedule action is added to the call flow and the Schedule properties are displayed:

Schedule Properties Name: <input type="text" value="Schedule"/> * <input type="button" value="Weekly Schedule"/> <input type="button" value="Holiday Schedule"/>	Results for <i>Schedule</i> <table border="1"> <thead> <tr> <th>Result</th> <th>Destination Action</th> </tr> </thead> <tbody> <tr> <td>Off-hours</td> <td>Message Center</td> </tr> <tr> <td>On-hours</td> <td>Message Center</td> </tr> </tbody> </table>	Result	Destination Action	Off-hours	Message Center	On-hours	Message Center
Result	Destination Action						
Off-hours	Message Center						
On-hours	Message Center						

4. Click **Weekly Schedule**. The schedule window is displayed. (Note: If the window does not appear, check to see if your browser is using a pop-up blocker.)
5. Select the days and set the start and end times and then click **Add**. (John's working hours are Monday to Friday from 8:00 a.m. to 5:00 p.m.)

Day of Week
☒ Monday ☐ Saturday
☒ Tuesday ☐ Sunday
☒ Wednesday
☒ Thursday
☒ Friday


Start Time
 Hour Min AM

End Time
 Hour Min PM

The weekly schedule should look like this:

Weekly Schedule			
Day	Start Time	End Time	Action
Monday	08:00 AM	05:00 PM	Delete
Tuesday	08:00 AM	05:00 PM	Delete
Wednesday	08:00 AM	05:00 PM	Delete
Thursday	08:00 AM	05:00 PM	Delete
Friday	08:00 AM	05:00 PM	Delete

- Click **OK**. A Call Director warning reminds you to save the Schedule (and the call flow) from the Call Flow window. Click **OK**.
- In the call flow window, click **Save**. The Weekly Schedule button changes color to indicate that a schedule is programmed.

 **Tip:** To create a schedule with different time periods, you need to define each period separately. For example, if John worked only until noon on Fridays, you would select Monday to Thursday and add the regular hours. Then you would clear the check boxes for Monday to Thursday and add Friday's hours separately.

Now that the schedule is set up, we need to define the actions to take during On-hours and Off-hours.

To define the Off-hours action:

- Click the Message Center link beside **Off-hours**:

Results for <i>Schedule</i>	
Result	Destination Action
Off-hours	Message Center
On-hours	Message Center

- In the Actions menu, click **Message**. The Message action is added to the call flow and the Message Properties are displayed.
- To distinguish this message from other messages in the call flow, give it a unique name and include the Recording number (Action ID) for ease of future maintenance. In the **Message Properties** window, type a name for this message (for example: "Off Hours Msg - ID 005".)

Message Properties

Name:

Delay:

Suppress Hangup Prompt: ☐

Action Id:

Message: Recording Not Recorded

Click **Save** to save the call flow. Don't worry about recording the message right now – you can record all messages when the call flow is complete.

Now we need to define what should happen after the Off-hours message plays. Recall that John wants to give callers the option to leave a message.

4. Click the Hang up link next to **Done**.

Results for <i>Message</i>	
Result	Destination Action
Done	Hang up

5. In the **Existing Actions** menu, re-use the “Voicemail – No Greeting” action that you programmed in a previous step. This avoids the repetition of John's voice mail greeting right after the Off-hours greeting.

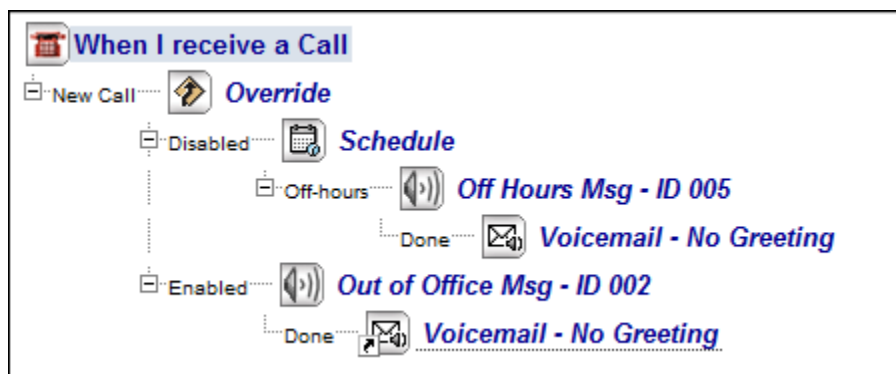
Specify Next Action

Click to assign an action to the 'Done' result of the 'Off Hours Msg - ID 005' action:

New Actions	Existing Actions
Override Schedule Message Menu Blind Transfer Supervised Transfer Screened Transfer Alternate Transfer Voicemail Dial-By-Name Internal/External Filter Caller-ID Filter Daily Greeting Message Center	Override Out of Office Msg - ID 002 Voicemail - No Greeting Schedule Off Hours Msg - ID 005

[Clear](#) [Cancel](#)

Your call flow should look like this:



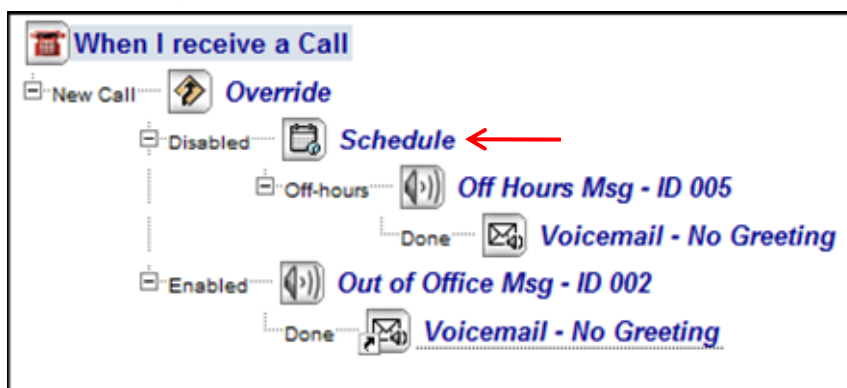
Tip: When an action is used more than once in a call flow (like “Voicemail – No Greeting” above), each subsequent instance is an **alias** of the original. Aliases inherit the properties of the

original and are identified by a small arrow at the bottom left of the icon and an underline. Changes made to the properties of the original action are automatically made to the alias. To break the link between an original and an alias, change the name of the alias.

That completes the Off-hours programming. Now we'll program the On-hours actions.

To define the On-hours actions:

1. In the Call Flow area, click **Schedule**.



2. In the Results section, click the Message Center link beside **On-hours**:

Results for Schedule	
Result	Destination Action
Off-hours	Message: Off Hours Msg - ID 005
On-hours	Message Center

3. In the New Actions menu, click **Daily Greeting**. The Daily Greeting action is added to the call flow and the greeting properties are displayed.

Tip: There are two types of Daily Greeting: **Today's Daily Greeting** and the **Default Daily Greeting**. Today's Daily Greeting allows users to personalize their greeting on a daily basis. Today's Daily Greeting is temporary and reverts at midnight back to the user's Default Daily Greeting. Users can customize the Daily Greeting every day ("Hi. You've reached John on Tuesday, October 5..."), or only for special circumstances ("I'm away on a site visit today..."). If no new Daily Greeting is recorded, then the Default Daily Greeting plays. If a Default Daily Greeting is not recorded, then the Primary Personal Greeting plays. Daily Greetings are not assigned action ID numbers. You can record them along with all other messages when the call flow is complete.

Daily Greeting Properties

Name: *

Today's Daily Greeting: Not Recorded

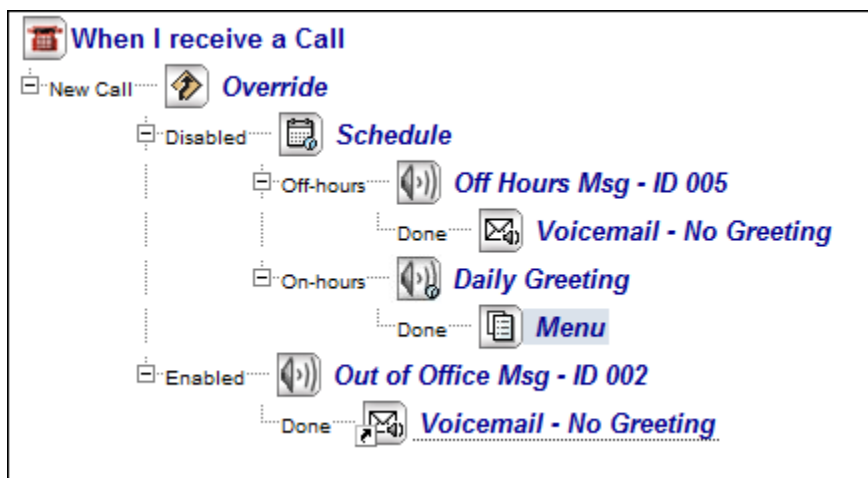
Default Daily Greeting: Not Recorded

Note: You can record the audio for this action by dialing into your mailbox and pressing the * key. Then follow the instructions.

4. After John's Daily Greeting (or the Default Greeting) plays, he wants callers to be presented with a menu of options. To add the menu action, click the Hang Up link beside **Done**:

Results for <i>Daily Greeting</i>	
Result	Destination Action
Done	Hang up

5. In the New Actions menu, click **Menu**. The menu action is added to the call flow and the Menu properties are displayed. Your call flow should look like this:



6. Click **Save** to save the call flow actions you've programmed so far.


Now that the Schedule is programmed, it's time set up the Menu properties.

Lesson 3: Programming Menu Key Assignments

We need to program three menu keys to meet John's requirements: 0 to reach the attendant, 1 to transfer calls to the Lab phone, and 9 to leave a message for John.

To program menu keys:

1. The Menu action in the call flow should be highlighted from the previous lesson. If not, click it.

 **Tip:** If a call flow has more than one menu, you can name them to avoid confusion when making recordings.

- The Menu properties are displayed. The key assignments are all set to Retry, which means they're not programmed to do anything.

Results for <i>Menu</i>	
Result	Destination Action
0	Retry
1	Retry
2	Retry
3	Retry
4	Retry
5	Retry
6	Retry
7	Retry
8	Retry
9	Retry
#	Retry
*	Retry
Multi-key	Hang up
Error	Hang up
Timeout	Retry

- Click the Retry link next to **0**. John wants callers to be transferred to the Attendant when they press 0. Since the attendant is almost certain to answer, a Blind Transfer is a good choice. But keep in mind that if the attendant does not answer, then the call is abandoned. (You may want to consider a Supervised Transfer if your attendant is not always present.)
- In the New Actions list, click **Blind Transfer**.
- In the Properties section, enter a name for this transfer (for example, "Blind Transfer to Attendant"). In the **Transfer To:** list, select Attendant/Operator. You can re-use this action anytime you need to transfer to the Attendant.

Blind Transfer Properties

Name: *

Transfer To: Attendant/Operator ▼

Extension:

Suppress Prompt: ☐

Try call-flow first: ☐

- Leave the **Extension** field blank. The administrator sets the attendant extension globally for all call flows.
- In the call flow window, click **Menu**.
- To program the **1** key, click the Retry link next to **1**. Program the **1** key to transfer calls to the lab extension. We'll make it a Supervised Transfer in case the lab phone is not answered.

9. In the Actions menu, select **Supervised Transfer**. Name this action “Supervised Transfer to Lab Phone” and type in the Lab phone **Extension** number.

Supervised Transfer Properties		Results for <i>Supervised Transfer</i>	
Name:	Supervised Transfer to Lab Phone *	Result	Destination Action
Transfer To:	Specified Extension ▼	Busy	Message Center
Extension:	5225	No Answer	Message Center
No Answer Timeout:	10	Invalid	Message Center
Suppress Prompt:	<input type="checkbox"/>		
Try call-flow first:	<input type="checkbox"/>		

The **No Answer Timeout** field specifies how long the system waits (seconds) for the lab phone to be answered before carrying out the action you have programmed for “No Answer”.

For the **Busy** and **No Answer** actions, John wants callers transferred to his voice mail. In this case, you would NOT suppress John’s voice mail greeting as the caller is expecting to be connected to John at the lab phone. John’s voice mail message should play to let the caller know that John is not available.

Note: Ensure that you have set up the required programming for Supervised Transfers to work properly. See “About Supervised Transfers” earlier in this module.

10. Click the [Message Center](#) link beside **Busy**. In the New Actions menu, select **Voicemail**.
11. In the **Name** field, type “Voicemail – With Greeting”. John can re-use this action anytime he needs the voice mail action with greeting included.
12. Click **Save** to save the new action and the call flow.
13. In the call flow window, click **Supervised Transfer to Lab Phone** and program the **No Answer** result. You can re-use the “Voicemail – With Greeting” action as shown here:

Specify Next Action

Click to assign an action to the 'No Answer' result of the 'Supervised Transfer to Lab Phone' action:

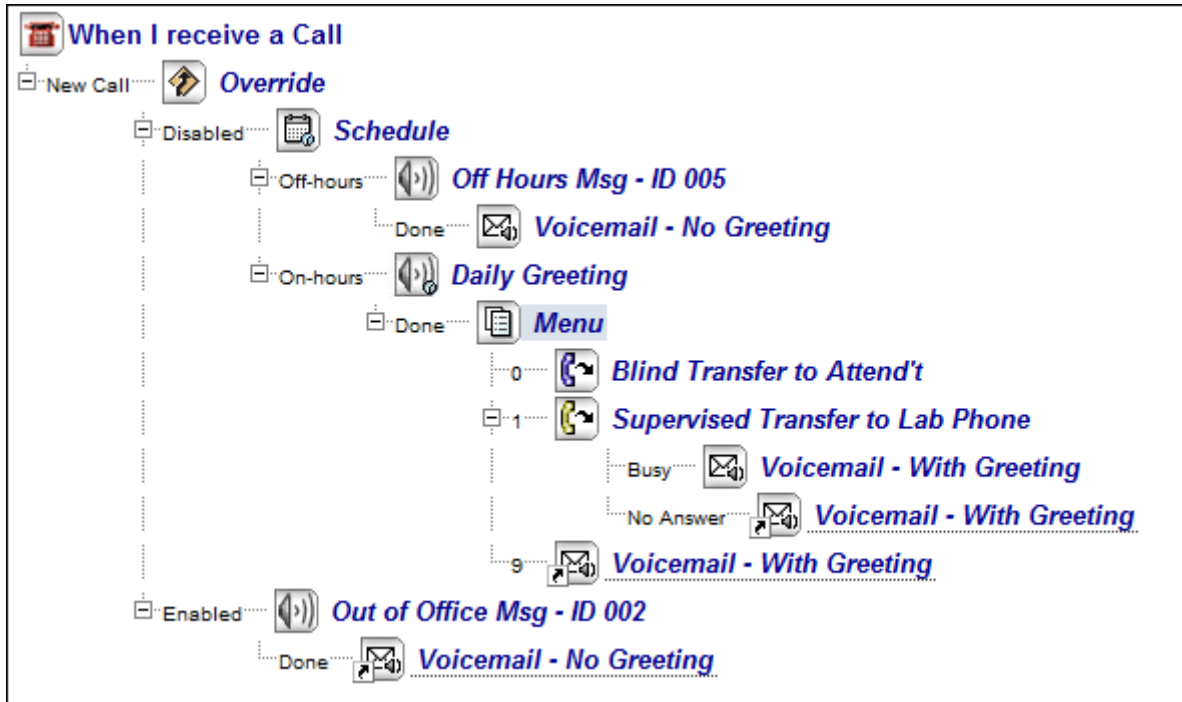
New Actions	Existing Actions
Override	Override
Schedule	Out of Office Msg - ID 002
Message	Voicemail - No Greeting
Menu	Schedule
Blind Transfer	Off Hours Msg - ID 005
Supervised Transfer	Daily Greeting
Screened Transfer	Menu
Alternate Transfer	Blind Transfer to Attend't
Voicemail	Supervised Transfer to Lab
Dial-By-Name	Voicemail - With Greeting
Internal/External Filter	
Caller-ID Filter	
Message Center	

Clear Cancel

14. In the call flow window, click **Menu** and program the **9** key to also send callers to John’s voicemail. In this case, John can use whichever Voicemail action he prefers.

15. Click **Save**.

John's completed call flow should look like this:



Lesson 4: Recording Call Flow Messages and Greetings

Audio for call flow messages is recorded through the NuPoint UM Telephone User Interface (TUI). John's call flow requires recording four messages.

To record audio for the messages:

1. You will need the three-digit action ID assigned to the Training Message. If you included the ID in the title of your messages, you can find it by displaying the call flow. If not, you can find it by clicking **Actions > Recordings** to get a list of all message IDs in the call flow. Here are John's IDs:

Recording Status			
To make a recording, click on the appropriate "record" button and call into your mailbox. Press * and follow the instructions			
To import a recording, click the appropriate 'Import' button, specify the file name and press 'Start Import'.			
ID	Element	Status	Action
002	Out of Office Msg - ID 002	Not Recorded	Record Import
005	Off Hours Msg - ID 005	Not Recorded	Record Import
006	Menu	Not Recorded	Record Import
→	Default Daily Greeting	Not Recorded	Record Import
→	Today's Daily Greeting	Not Recorded	Record Import
Close			

2. Enter the NuPoint UM system access number.
 - If you do this from your own phone you will be asked for the passcode for your mailbox.
 - If you do this from another phone, press the * key when you hear the welcome prompt and then enter your mailbox number followed by a *, and then enter your passcode.
3. Once you have accessed your mailbox, press the * key. This will take you to the Call Director telephony interface. Follow the voice prompts to record messages. For example, in the case of John's recordings, Call Director prompts you:
 - To record today's Daily Greeting, press **G**.
 - To record the Default Daily Greeting, press **S**.
 - To record messages or menu prompts, press **M**.
4. Select an option and you are prompted to press **R** to record a greeting. You can use these sample recordings:

Element	Recording
Daily Greeting	Hi, this is John. It's Tuesday, June 23 rd and I am in meetings until 1 PM today. Please select from the following menu:
Default Daily Greeting	Hi, this is John and I'm away from my phone right now. Please select from the following menu:
Menu 006	Press 1 to try me at my lab phone. Press 9 to leave me a message. Press 0 to return to the Attendant.
Out of Office 002	Hi, you've reached John but I'm not in the office today. Please leave a message.
Off hours 005	Hi, you've reached John at Acme Widgets. The office is closed. Please leave a message.

5. When you are done recording, press the # key or hang up to exit.

Lesson 5: Testing Your Call Flow

If your extension is integrated with NuPoint Messaging, callers dialing your extension number are forwarded to your voice mailbox when your extension does not answer. Now that you have created a call flow for your extension, Call Director should direct the call when there is no answer at your extension, or when a Schedule or Override condition is met.

Testing Your Call Flow for Ring no Answer:

Step		What you hear:
1.	Ensure that your extension is forwarded Ring No Answer to NuPoint Unified Messaging.	
2.	Place a call to your phone from another phone. Let your extension forward to NuPoint UM.	... your extension ringing...
3.	Your call flow should now answer the call.	"Hi, this is <your name>. <Your Daily Greeting or Default Daily Greeting>"
4.	Now you should hear the call flow menu you programmed.	Mailbox <mailbox number> Menu "Press [1] to try me at my lab phone Press [9] to leave me a message Press [0] to transfer to the operator"
5.	Press 9 to leave a message	Voicemail greeting OR <Beep!> (when greeting is suppressed)

Testing your Call Flow on a Forward Busy

Step		What you hear:
1.	Ensure your extension is off-hook and is forwarded Ring Busy to NuPoint UM.	
2.	Place a call to your phone from another phone. Let your extension forward busy to NuPoint UM.	
3.	Your call flow should now answer the call.	"Hi, this is <your name>. <Your Daily Greeting or Default Daily Greeting>"
4.	Now you should hear the call flow menu you programmed.	Mailbox <mailbox number> Menu "Press [1] to try me at my lab phone Press [9] to leave me a message Press [0] to transfer to the operator"
5.	Press 9 to leave a message	Voicemail greeting OR <Beep!> (when greeting is suppressed)