

## CLEARSPAN® AUTO ATTENDANT - STANDARD

### PLAN, DEFINE, AND TEST YOUR AUTO ATTENDANTS

1. Map out your Interactive Voice Response (IVR) structure.
2. Configure a time schedule for your organization's business hours and a holiday schedule for your organization's holidays.
3. Configure the addresses for the phone numbers.
4. Use the web interface to create an Auto Attendant account for the main menu in your IVR structure.
5. Set up the main menu and all submenus.
6. Record custom messages using the voice portal or upload audio files using the web interface. If you enabled video support, also upload video files.
7. Call the Auto Attendant numbers to test your design.

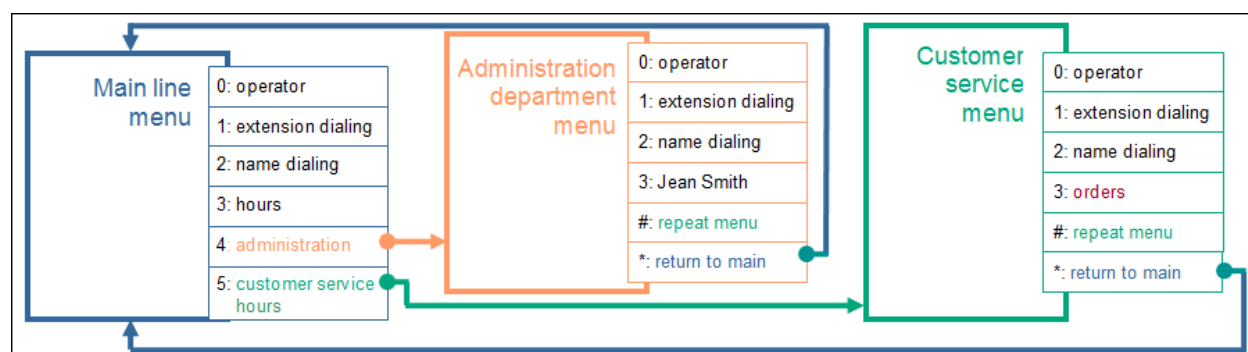
### TIPS

- Callers who do not press a key are transferred to the operator.
- Internal transfers require only an extension.
- First-level extension dialing and extension dialing at anytime allow the user to dial an extension without having to select an option first.
- List menu options in a predictable order.
- List menu options that transfer to the operator last ("... to reach the operator, press 0 or stay on the line").

Use the name and extension dialing scope controls to determine whether your Auto Attendant can direct calls to users in the same group, department, or enterprise.

### SAMPLE AUTO ATTENDANT STRUCTURE

This Quick Reference Guide gives an overview of the steps required to create this sample interactive menu structure.



### MAIN LINE REQUIREMENTS

**Number:** 301-555-6110 **Extension:** 6110

**Language:** English **Business Hours:** Mon to Fri

**Holiday Schedule:** USA 2012

**Name Dialing Entries:** Allow callers to begin with either the first or last name of the person they want to reach.

**First-level Extension Dialing:** On during business hours and off after hours and during holidays.

**Business Hours Greeting (custom):** "Welcome to ABC Distributing. If you know the extension of the party you are trying to reach, dial it now. To use our automated name directory, press 2. For our regular business hours, press 3. To reach the

administration department, press 4; to reach customer service, press 5. To reach the operator, press 0, or stay on the line".

**After Hours Greeting (custom):** "Welcome to ABC Distributing. Our offices are now closed. To leave a message at an extension, dial 1. To use our automated name directory, press 2. For our regular business hours, press 3. Thank you for calling."

**Holiday Greeting (custom):** "Welcome to ABC Distributing. Our offices are closed for holidays. To leave a message at an extension, dial 1. For our regular business hours, press 3. Thank you for calling."

## ADMINISTRATION DEPARTMENT REQUIREMENTS

### Extension Dialing at Anytime: Off

**Submenu Greeting** (custom): "You have reached the administration department of ABC Distributing. If you know the extension of the party you are trying to reach, dial it now. To use our automated name directory, press 2. To reach Jean Smith, press 3. To repeat this menu, press the pound key. To go back to the previous menu, press the star key. To reach the operator, press 0 or stay on the line."

## CUSTOMER SERVICE REQUIREMENTS

### Extension Dialing at Anytime: On

**Submenu Greeting** (custom): "You have reached the customer service department of ABC Distributing. To dial an extension, press 1. To use our automated name directory, press 2. To place an order, press 3. To repeat this menu, press the pound key. To go back to the previous menu, press the star key. To reach an operator, press 0 or stay on the line."

## ORDERS CALL CENTER

**Number:** 301-555-6118

**Extension:** 6118

A Call Center dispatches calls to specified agents. Note that the Call Center has a direct line phone number, so that customers also have the option to call it directly.

## CREATE AUTO ATTENDANT

### CONFIGURE TIME AND HOLIDAY SCHEDULES

Use the *Group – Schedules* page of the web interface to configure the required time and holiday schedules.

Configure the "Mon to Fri" time schedule to specify the company's regular business hours.

Configure the "USA 2012" holiday schedule to define the U.S. statutory holidays for 2012.

### DEFINE AUTO ATTENDANT

1. On the Group home page, click **Services**. Click **Auto Attendant**. Then click **Add Standard**. The *Group – Auto Attendant Add* page appears.
2. Type the Auto Attendant ID, name, calling line ID last name, and calling line ID first name.
3. If applicable, type the Auto Attendant calling line ID phone number.
4. Select the department.
5. From the *Language* list, select "English".
6. From the *Time Zone* list, select the time zone.
7. Optionally, select a network class of service.
8. To enable video support, check the *Enable video support* option.

9. Specify the scope of extension and name dialing.
10. For the *Name Dialing Entries*, select *LastName + FirstName* and *FirstName + LastName*.
11. Specify the time in seconds after which the call is transferred to the operator.
12. Click **OK**. The *Group – Auto Attendant* page appears listing existing Auto Attendants.

### SET AUTO ATTENDANT ADDRESSES

1. Select the Auto Attendant. On the *Group – Auto Attendant* page, click **Edit** or any item in the row for the Auto Attendant. The *Auto Attendant – Profile* menu page appears.
2. Click **Addresses**. The *Auto Attendant - Addresses* page appears.
3. From the *Phone Number* list, select "3015556110". The extension appears in the *Extension* box.
4. Configure an access device that supports analog phones (an IAD gateway, not a SIP phone).
5. Save your changes by clicking **OK**.

### ADD CUSTOM GREETING TO ANNOUNCEMENT REPOSITORY

1. Select the Auto Attendant. On the *Group – Auto Attendant* page, click **Edit** or any item in the row for the Auto Attendant. The *Auto Attendant – Profile* menu page appears.
2. Click **Announcement Repository**. The *Auto Attendant – Attendant Repository Add* page appears.
3. Click **Add**. The *Auto Attendant – Attendant Repository Add* page appears.
4. Type the announcement name and click **Browse** to locate and upload the audio file with the custom greeting.
5. Click **OK**.
6. Repeat the last two steps for each greeting to add.

**NOTE:** You can also use custom greetings from the group's announcement repository in the Auto Attendant.

### DEFINE ADMINISTRATION SUBMENU

1. On the *Auto Attendant – Profile* menu page, click **Submenus**. The *Auto Attendant – Auto Attendant Submenus* page appears.
2. Click **Add**. The *Auto Attendant – Auto Attendant Submenu Add* page appears.
3. In the *Submenu ID* text box, enter "Administration".
4. Click **Personal Greeting**.
5. Select a greeting form the *Audio* drop-down list.
6. If you enabled video support, select a greeting form the *Video* drop-down list.
7. Do not check *Enable extension dialing at anytime*.
8. Configure the menu as follows:

| KEY | DESCRIPTION       | ACTION                  | ACTION DATA |
|-----|-------------------|-------------------------|-------------|
| 0   | Group operator    | Transfer to operator    | 6111        |
| 1   | Dial by extension | Extension dialing       |             |
| 2   | Dial by name      | Name dialing            |             |
| 3   | Jean Smith        | Transfer with prompt    | 6120        |
| #   | Repeat            | Repeat menu             |             |
| *   | Main Line         | Return to previous menu |             |

- Click **OK**.

## DEFINE CUSTOMER SERVICE SUBMENU

- On the *Auto Attendant – Auto Attendant Submenus* page, click **Add**. The *Auto Attendant Submenu Add* page appears.
- In the *Submenu ID* text box, enter "CustomerService".
- Click **Personal Greeting**.
- Select a greeting form the *Audio* drop-down list.
- If you enabled video support, select a greeting form the *Video* drop-down list.
- Check the *Enable extension dialing at anytime* box to allow callers to dial an extension without having to select an option first.
- Configure the menu as follows:

| KEY | DESCRIPTION        | ACTION                  | ACTION DATA |
|-----|--------------------|-------------------------|-------------|
| 0   | Group operator     | Transfer to operator    | 6111        |
| 1   | Dial by extension  | Extension dialing       |             |
| 2   | Dial by name       | Name dialing            |             |
| 3   | Orders Call Center | Transfer with prompt    | 6118        |
| #   | Repeat             | Repeat menu             |             |
| *   | Main Line          | Return to previous menu |             |

- Click **OK**.

## SET BUSINESS HOURS MENU

- In the Options list, click **Menus**. The *Auto Attendant – Menus* menu page appears.
- Click **Business Hours Menu**. The *Auto Attendant – Business Hours Menu* page appears.
- Click **Personal Greeting**.
- Select a greeting form the *Audio* drop-down list.
- If you enabled video support, select a greeting form the *Video* drop-down list.

- Check the *Enable first-level extension dialing* box to allow callers to dial an extension immediately after the greeting.
- Configure the menu as follows:

| KEY | DESCRIPTION       | ACTION               | ACTION DATA                                                             |
|-----|-------------------|----------------------|-------------------------------------------------------------------------|
| 0   | Group operator    | Transfer to operator | 6111                                                                    |
| 1   | Dial by extension | Extension dialing    |                                                                         |
| 2   | Dial by name      | Name dialing         |                                                                         |
| 3   | Business hours    | Play announcement    | Filename of the business hours announcement file selected from the list |
| 4   | Administration    | Transfer to submenu  | Administration submenu                                                  |
| 5   | Customer service  | Transfer to submenu  | CustomerService submenu                                                 |

- Click **OK**.

## SET AFTER HOURS MENU

- On the *Auto Attendant – Menus* menu page, click **After Hours Menu**. The *Auto Attendant – After Hours Menu* page appears.
- Click **Personal Greeting**.
- Select a greeting form the *Audio* drop-down list.
- If you enabled video support, select a greeting form the *Video* drop-down list.
- Do not check the *Enable first-level extension* dialing box.
- From the *Business Hours* drop-down list, select *Mon to Fri*.
- Configure the menu as follows:

| KEY | DESCRIPTION     | ACTION               | ACTION DATA                                       |
|-----|-----------------|----------------------|---------------------------------------------------|
| 0   | Group operator  | Transfer to operator | 6111                                              |
| 1   | Leave a message | Transfer to mailbox  |                                                   |
| 2   | Dial by name    | Name dialing         |                                                   |
| 3   | Business hours  | Play announcement    | Filename of the business hours announcement file. |

- Click **OK**.

## SET HOLIDAY MENU

1. On the *Auto Attendant – Menus* menu page, click **Holiday Menu**. The *Auto Attendant – Holiday Menu* page appears.
2. Click **Personal Greeting**.
3. Select a greeting from the *Audio* drop-down list.
4. If you enabled video support, select a greeting from the *Video* drop-down list.
5. Do not check the *Enable first-level extension dialing* box.
6. From the *Holiday Schedule* drop-down list, select *USA 2012*.
7. Configure the menu as follows:

| KEY | DESCRIPTION     | ACTION               | ACTION DATA                                       |
|-----|-----------------|----------------------|---------------------------------------------------|
| 0   | Group operator  | Transfer to operator | 6111                                              |
| 1   | Leave a message | Transfer to mailbox  |                                                   |
| 3   | Business hours  | Play announcement    | Filename of the business hours announcement file. |

8. Click **OK**.