

CLEARSPAN® AUTO ATTENDANT – BASIC

Plan, Define, and Test Your Auto Attendants

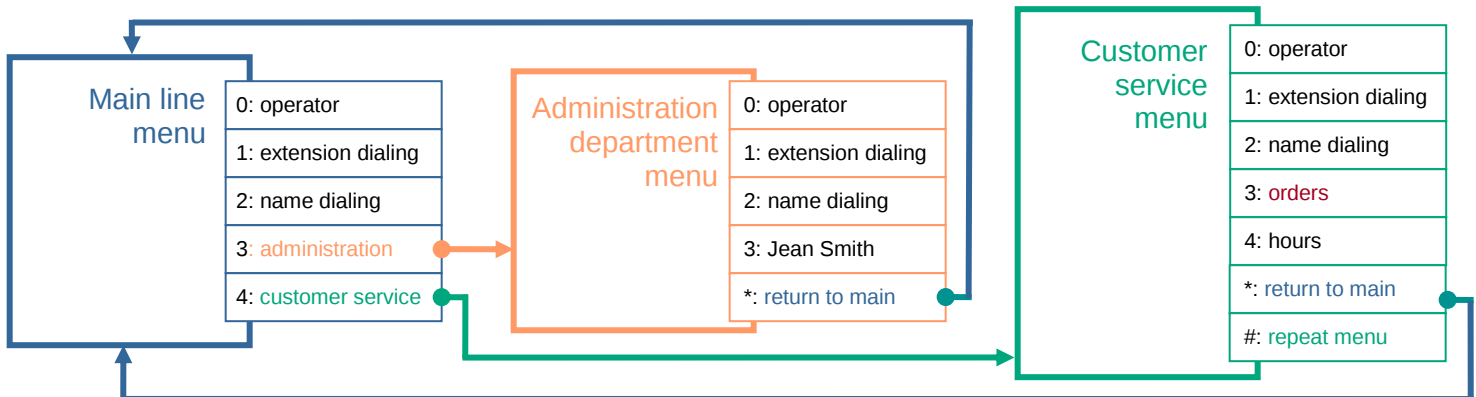
1. Map out your Interactive Voice Response (IVR) structure.
2. Configure time schedules for your organization's business hours and holiday schedules for non-business days. Setting the same business hours for all Auto Attendants makes the configuration simpler; setting different business hours gives more flexibility.
3. Configure the addresses for the phone numbers.
4. Use the web interface to create an Auto Attendant account for each main menu in your IVR structure and set up their menus.
5. Record custom messages using the voice portal or upload audio/video files using the web interface.
6. Call the Auto Attendant numbers to test your design.

Tips

- Callers who do not press a key are transferred to the operator.
- When using First-level Extension Dialing, you are not required to configure a key for extension dialing. You can use the "1" key for a different action instead.
- Internal transfers require only an extension.
- 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 Auto Attendant: Requirements

Number: 301-555-6110

Extension: 6110

Language: English
time

Business Hours: All the time

Holiday Schedule: None

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

Business Hours Greeting (custom): "Welcome to Company ABC. 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 the administration department, press 3; to reach customer service, press 4; to reach the operator, press 0, or stay on the line".

DEFINE MAIN LINE AUTO ATTENDANT

1. On the Group home page of the web interface, click **Services**. Click **Auto Attendant**. Then click **Add Basic**. The *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, enter the 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. From the *Network Class of Service* drop-down list, select a network class of service.
8. From the *Business Hours* list, select "Every Day All Day".
9. Specify the scope of extension and name dialing.
10. For *Name Dialing Entries*, check *LastName + FirstName* and *FirstName + LastName*.

- Specify the time in seconds after which the call should be transferred to the operator.
- Click **OK**. The *Group – Auto Attendant* page appears listing existing Auto Attendants.

ADD CUSTOM GREETING TO ANNOUNCEMENT REPOSITORY

- On the *Group – Auto Attendant* page, click **Edit** in the row for the Auto Attendant. Click **Announcement Repository**, then click **Add**. The *Auto Attendant – Announcement Repository Add* page appears.
- Type the announcement name and click **Browse** to locate and upload the audio file with the custom greeting. Click **OK**.

SET BUSINESS HOURS MENU

- Select the Auto Attendant. On the *Group – Auto Attendant* page, click **Edit** or any item in the row of the Auto Attendant. The *Auto Attendant – Profile* menu page appears.
- From 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** and select the greeting from the *Audio* 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	Administration	Transfer with prompt	6114
4	Customer service	Transfer with prompt	6115

- Click **OK**.

NOTE: The Main Line Auto Attendant has business hours all the time; you do not need to configure an after-hours greeting and dialing menu.

SET AUTO ATTENDANT ADDRESSES

- From the *Options* list, select *Profile*. The *Auto Attendant – Profile* menu page appears.
- Click **Addresses**. The *Auto Attendant – Addresses* page appears.
- From the *Phone Number* list, select “3015556110”. The extension appears in the *Extension* box.
- Configure an access device that supports analog phones (an IAD gateway, not a SIP phone).
- Save your changes by clicking **OK**.

Administration Auto Attendant: Requirements

Extension: 6114

Language: English

Business Hours: Mon to Fri
2012

Holiday Schedule: USA

Name Dialing Entries: Require callers to begin with the last name of the person they want to reach.

First-level Extension Dialing: On

Business Hours Greeting (custom): “You have reached the administration department of Company ABC. 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 go back to the previous menu, press the star key. To reach the operator, press 0 or stay on the line.”

After Hours Greeting (system default for First-level Extension Dialing): “Welcome. Our offices are now closed. If you know the extension of the party you are trying to reach, dial it now. To use our automated name directory, press 2. Thank you for calling.”

DEFINE ADMINISTRATION AUTO ATTENDANT

- On the *Group – Auto Attendant* page, click **Add Basic**. The *Auto Attendant Add* page appears.
- Type the Auto Attendant ID, name, calling line ID last name, and calling line ID first name.
- If applicable, enter the calling line ID phone number.
- Select the department.
- From the *Language* list, select “English”.
- From the *Time Zone* list, select the time zone.
- From the *Network Class of Service* drop-down list, select a network class of service.
- From the *Business Hours* list, select “Mon to Fri”.
- From the *Holiday Schedule* list, select “USA 2014”.
- Specify the scope of extension and name dialing.
- For Name Dialing Entries, check *LastName + FirstName* and *FirstName + LastName*.
- Specify the time in seconds after which the call should be transferred to the operator.
- Click **OK**. The *Group – Auto Attendant* page appears.

ADD CUSTOM GREETING TO ANNOUNCEMENT REPOSITORY

1. On the *Group – Auto Attendant* page, click **Edit** or any item in the row for the Auto Attendant you are configuring. Click **Announcement Repository**, then click **Add**. The *Auto Attendant – Announcement Repository Add* page appears.
2. Type the announcement name and click **Browse** to locate and upload the audio file with the custom greeting.
3. Click **OK**.

SET BUSINESS HOURS MENU

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. From the *Options* list, click **Menus**. The *Auto Attendant – Menus* menu page appears.
3. Click **Business Hours Menu**. The *Auto Attendant – Business Hours Menu* page appears.
4. Click **Personal Greeting** and select the greeting from the *Audio* drop-down list.
5. Check the *Enable first-level extension dialing* box to allow callers to dial an extension immediately after the greeting.
6. 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
4	Main Line	Transfer with prompt	6110

7. Click **OK**. The *Auto Attendant – Menus* menu page appears.

SET AFTER HOURS MENU

1. Click **After Hours Menu**. The *Auto Attendant – After Hours Menu* page appears.
2. Click **Default Greeting**.
3. Check the *Enable first-level extension dialing* box to allow callers to dial an extension immediately after the greeting.

4. 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	

5. Click **OK**. The *Auto Attendant – Menus* menu page appears.

SET AUTO ATTENDANT ADDRESSES

1. From the *Options* list, select *Profile*. The *Auto Attendant – Profile* menu page appears.
2. Click **Addresses**. The *Auto Attendant - Addresses* page appears.
3. In the *Extension* box, type “6114”.
4. Configure an access device that supports analog phones (an IAD gateway, not a SIP phone).
5. Save your changes by clicking **OK**.

Customer Service Auto Attendant: Requirements

Extension: 6115

Language: English

Business Hours: Mon to Fri
2012

Holiday Schedule: USA

Name Dialing Entries: Callers can begin with the last name or the first name of the person they want to reach.

First-level Extension Dialing: Off

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

After Hours Greeting (custom): “You have reached the customer service department of Company ABC. Our offices are now closed. To leave a message at an extension, press 1. To use our automated name directory, press 2. To listen to our business hours, press 4. Thank you for calling.”

DEFINE CUSTOMER SERVICE AUTO ATTENDANT

1. On the *Group – Auto Attendant* page, click **Add Basic**. The *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, enter the 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. From the *Network Class of Service* drop-down list, select a network class of service.
8. From the *Business Hours* list, select “Mon to Fri”.
9. From the *Holiday Schedule* list, select “USA 2014”.
10. Specify the scope of extension and name dialing.
11. For *Name Dialing Entries*, check *LastName + FirstName* and *FirstName + LastName*.
12. Specify the time in seconds after which the call should be transferred to the operator.
13. Click **OK**. The *Group – Auto Attendant* page appears.

SET BUSINESS HOURS MENU

Use announcements from your group's announcement repository.

1. 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. From the *Options* list, click **Menus**. Click **Business Hours Menu**. The *Auto Attendant – Business Hours Menu* page appears.
3. Click **Personal Greeting** and select the greeting from the *Audio* drop-down list.
4. Do not check the *Enable first-level extension dialing* box.
5. 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
*	Back to Main Line	Transfer with prompt	6110
#	Repeat	Repeat menu	

6. Click **OK**.

SET AFTER HOURS MENU

1. On the *Auto Attendant – Menus* menu page, click **After Hours Menu**. The *After Hours Menu* page appears.
2. Click **Personal Greeting**. Click **Browse** to locate and upload the audio file recorded for the custom greeting.
3. Do not check the *Enable first-level extension dialing* box.
4. 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	
4	Business Hours	Play announcement	

5. Click **OK**. The *Auto Attendant – Menus* menu page appears.

SET AUTO ATTENDANT ADDRESSES

1. From the *Options* list, select *Profile*. The *Auto Attendant – Profile* menu page appears.
2. Click **Addresses**. The *Auto Attendant - Addresses* page appears.
3. In the *Extension* box, type “6115”.
4. Configure an access device that supports analog phones (an IAD gateway, not a SIP phone).
5. Save your changes by clicking **OK**.

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.