

Setting Up Your Auto Attendant Menus

Plan, Define, and Test Your Auto Attendants

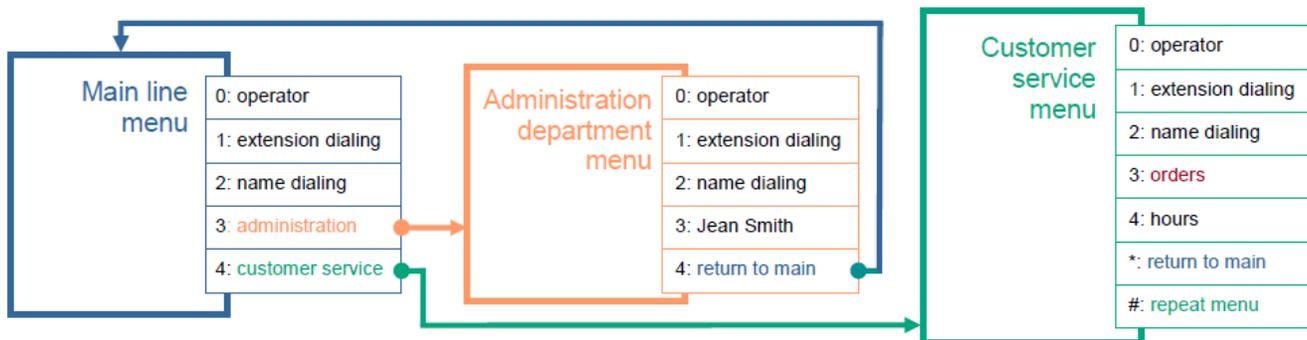
1. Map out your Interactive Voice Response (IVR) structure.
2. Configure time schedules for your organization’s business hours and holiday schedules for non-business days. Setting the same business hours for all Auto Attendants makes the configuration simpler; setting different business hours gives more flexibility.
3. Configure the addresses for the phone numbers.
4. Use the Web Portal 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 in the Web Portal.
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 the menu options in a predictable order, so callers will know which key is next.
- 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 reviews the steps required to create the following sample interactive menu structure:



Main Line Auto Attendant

Requirements

Number: 301-555-6110 **Extension:** 6110
Language: English **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.
Sample Message: “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, please 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** page of the Web Portal, click *Services*, then *Auto Attendant*. The **Auto Attendant Add** page displays.
2. Type the Auto Attendant ID, name, calling line ID last name, and calling line ID first name.
3. Select the department.
4. From the **Language** list, select *English*.

5. From the **Time Zone** list, select the time zone.
6. From the **Business Hours** list, select *Every Day All Day*.
7. Specify the scope of extension dialing, scope of name dialing, and name dialing entries.
8. On the **Name Dialing Entries** control, click *LastName + FirstName* and *FirstName + LastName*.
9. Click **OK**. The *Business Hours* menu page appears.

Set Business Hours Menu

1. Click **Personal Greeting**. Click **Browse** to locate the audio file recorded for the custom greeting.
2. Check the *Enable first-level extension dialing* box to allow callers to dial an extension immediately after the greeting.
3. Configure the menu as follows:

Key	Description	Action	Number
0	Group operator	Transfer to operator	6111
1	Dial by extension	Extension dialing	
2	Dial by name	Name dialing	

Key	Description	Action	Number
3	Administration	Transfer with prompt	6114
4	Customer Service	Transfer with prompt	6115

- Click **OK**. 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

- Select the Auto Attendant user. On the *Group – Auto Attendant* page, click **Edit** or any item in the row corresponding to the paging user. The *Auto Attendant – Profile* menu page appears.
- On the *Auto Attendant – Profile* menu page, click **Addresses**. The *Auto Attendant User - 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 Department Auto Attendant Requirements

Extension: 6114 **Language:** English
Business Hours: Mon to Fri **Holiday Schedule:** USA 2013
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, please press 2. To reach Jean Smith, press 3. To go back to the previous menu, press 4. 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, please press 2. Thank you for calling.”

Define Administration Department Auto Attendant

On the *Auto Attendant Add* page:

- Type the Auto Attendant ID, name, calling line ID last name, and calling line ID first name.
- Select the department.
- From the **Language** list, select *English*.
- From the **Time Zone** list, select the time zone.
- From the **Business Hours** list, select *Every Day All Day*.
- From the **Holiday Schedule** list, select *USA 2013*.
- Specify the scope of extension dialing, scope of name dialing, and name dialing entries.

- On the **Name Dialing Entries** control, click *LastName + FirstName* and *FirstName + LastName*.
- Click **OK**. The *Business Hours* menu page appears.

Set Business Hours Menu

- Click **Personal Greeting**. Click **Browse** to locate the audio file recorded for the custom greeting.
- 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	Number
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

- Click **OK**. The *After Hours* menu page appears.

Set After Hours Menu

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

Key	Description	Action	Number
0	Group operator	Transfer to operator	6111
1	Dial by extension	Extension dialing	
2	Dial by name	Name dialing	

Set Auto Attendant Addresses

- Select the Auto Attendant user. On the *Group – Auto Attendant* page, click **Edit** or any item in the row corresponding to the paging user. The *Auto Attendant – Profile* menu page appears.
- On the *Auto Attendant – Profile* menu page, click **Addresses**. The *Auto Attendant User - Addresses* page appears.
- In the *Extension* box, type 6114.
- Configure an access device that supports analog phones (an IAD gateway, not a SIP phone).
- Save your changes by clicking **OK**.

Customer Service Auto Attendant

Requirements

Extension: 6115 **Language:** English
Business Hours: Mon to Fri **Holiday Schedule:** USA 2013
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. If you know the extension of the party you are trying to reach, dial it now. To use our automated name directory, please press 2. To place an order, press 3. To listen to our business hours, press 4. 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 (system default): "Welcome. Our offices are now closed. If you know your party's extension, press 1. To use our automated name directory, please press 2. Thank you for calling."

Define Customer Service Auto Attendant

On the *Auto Attendant Add* page:

1. Type the Auto Attendant ID, name, calling line ID last name, and calling line ID first name.
2. Select the department.
3. From the **Language** list, select *English*.
4. From the **Time Zone** list, select the time zone.
5. From the **Business Hours** list, select *Every Day All Day*.
6. From the **Holiday Schedule** list, select *USA 2013*.
7. Specify the scope of extension dialing, scope of name dialing, and name dialing entries.
8. On the **Name Dialing Entries** control, click *LastName + FirstName* and *FirstName + LastName*.
9. Click **OK**. The *Business Hours* menu page appears.

Set Business Hours Menu

1. Click **Personal Greeting**. Click **Browse** to locate the audio file recorded for the custom greeting.
2. Do NOT check the *Enable first-level extension dialing* box.
3. Configure the menu as follows:

Key	Description	Action	Number
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
4	Customer Service	Transfer with prompt	6115
*	Back to Main Line	Transfer with prompt	6110
#	Repeat	Repeat menu	

4. Click **OK**. The *After Hours* menu page appears.

Set After Hours Menu

1. Click **Default Greeting**.
2. Do NOT check the *Enable first-level extension dialing* box.
3. Configure the menu as follows:

Key	Description	Action	Number
0	Group operator	Transfer to operator	6111
1	Dial by extension	Extension dialing	
2	Dial by name	Name dialing	

Set Auto Attendant Addresses

1. Select the Auto Attendant user. On the *Group – Auto Attendant* page, click **Edit** or any item in the row corresponding to the paging user. The *Auto Attendant – Profile* menu page appears.
2. On the *Auto Attendant – Profile* menu page, click **Addresses**. The *Auto Attendant User - 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 customers also have the option to call it directly.