

## Plan, Define and Test Your Auto Attendants

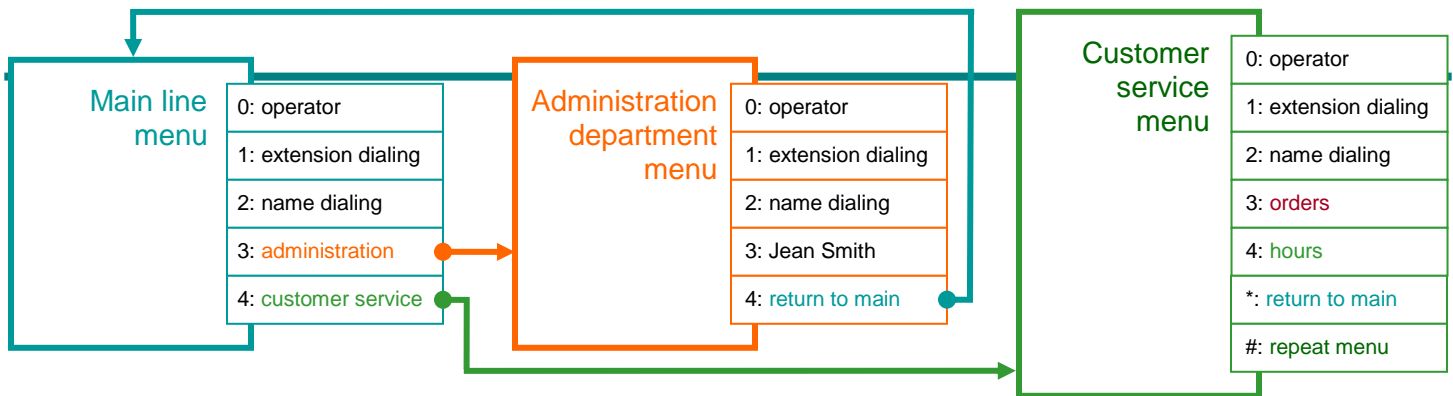
1. Map out your IVR structure.
2. Configure time schedules for your organization's business hours and holiday schedules for non-business days.
3. Setting the same business hours for all auto attendants makes the configuration simpler; setting different business hours gives more flexibility.
4. Use the 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

**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, 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

On the *Group* home page of the web interface, click **Services**. Click **Auto Attendant**. Then click **Add**. The *Auto Attendant Add* page appears.

- From the *Phone Number* list, select "3015556110". The extension appears in the Extension box.
- From the *Language* list, select "English".
- From the *Business Hours* list, select "Every Day All Day".
- From the *Holiday Schedule* list, select "None".
- On the Name Dialing Entries control, click "LastName+FirstName and FirstName+LastName".

Click **OK**. The *Business Hours Menu* page appears.

### Set Business Hours Menu

1. Click "Personal Greeting".
2. Click **Browse** to locate the audio file recorded for the custom 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	Number
0	group operator	Transfer to operator	6111
1	dial by extension	Extension dialing	
2	dial by name	Name dialing	
3	<b>Administration</b>	Transfer with prompt	6114
4	<b>Customer Service</b>	Transfer with prompt	6115

5. 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.

### Administration Auto Attendant: Requirements

**Extension:** 6114                      **Language:** English  
**Business Hours:** Mon to Fri      **Holiday Schedule:** USA 2005  
**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 Auto Attendant

On the *Auto Attendant Add* page:

- In the *Extension* box, type 6114.
- From the *Language* list, select "English".
- From the *Business Hours* list, select "Mon to Fri".
- From the *Holiday Schedule* list, select "USA 2005".
- On the *Name Dialing Entries* control, click "LastName+FirstName".

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	
3	Jean Smith	Transfer with prompt	6120
4	<b>Main Line</b>	Transfer with prompt	6110

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

### Set After Hours Menu

1. Click "Default Greeting".
2. Check the *Enable first-level extension dialing* box to allow callers to dial an extension immediately after hearing the default greeting.
3. Do not configure the menu on the *After Hours* page. The default greeting is played and the default key configurations for keys 0, 1, and 2 are used, 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	

### Customer Service Auto Attendant: Requirements

**Extension:** 6115                      **Language:** English  
**Business Hours:** Mon to Fri      **Holiday Schedule:** USA 2005  
**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:

- In the *Extension* box, type 6115.
- From the *Language* list, select "English".
- From the *Business Hours* list, select "Mon to Fri".
- From the *Holiday Schedule* list, select "USA 2005".
- On the *Name Dialing Entries* control, click "LastName + FirstName and FirstName + LastName".

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	<b>Orders</b> Call Center	Transfer with prompt	6118
4	<b>Customer Service</b>	Transfer with prompt	6115
*	Back to <b>Main Line</b>	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. Do not configure the menu on the *After Hours* page. The default greeting is played and the default key configurations for keys 0, 1, and 2 are used.

### 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.