Feature Overview

Delivering a professional first impression is critical for all businesses, large or small. One way to achieve this with a phone system solution is to make sure that every call is answered in a timely manner.

The Auto Attendant serves as a receptionist that answers the phone and routes calls to various destinations, employees within your company, and specific groups of employees, voicemail, or other outside numbers. They provide callers with your company greeting and dialing menu options. Each Auto Attendant is assigned a unique 10-digit number for identification and setup purposes.

- The Auto Attendant has two modes – one for business hours and the other for after hours. Each mode allows administrators to setup options 1-9, #, and * to present callers with different options from which to select. To route callers to another *set, or branch* of options – an additional Auto Attendant must be assigned to your account. To order an additional Auto Attendant, please contact your Account Manager.

- To route calls based on the time of day (e.g., after hours versus traditional business hours), you must configure an Auto Attendant schedule. You can also configure a company holiday schedule to identify the dates of holidays your company recognizes. On designated holidays, the after-hours greeting and menu dialing options are played to callers.

- If you require a unique message, greetings may be uploaded to the My Account Web Portal as a .wav file or recorded from the Voice Portal.

    - For instructions on how to record your Auto Attendant greetings from the Voice Portal, please reference the Voice Portal Quick Reference Guide
    - All greetings must be formatted as CCIT u-Law 8.000kHz, 8 bit Mono .WAV

The Auto Attendant uses two schedules – a "business hours" and "holiday" schedule – to determine whether to apply Auto Attendant options defined for the business hours mode or after hours mode. During a holiday schedule, callers will be routed based on After Hours settings. To learn how to manage the Auto Attendant's Time Schedules, please reference the *Schedule* Quick Reference Guide.

- To run the same greeting at all times of the day (i.e. one mode 24x7), you do not need to modify your site schedules. When you configure the Auto Attendant:
    - Configure your AA settings so that each keypad has the desired action assigned to it. When you assign each action in Keypad settings, check the "Duplicate for after hours" radio button for each keypad.
    - Ensure that you have the desired Business Hours and After Hours AA greetings uploaded. If you want the same greeting at all times, upload the same greeting to both locations.

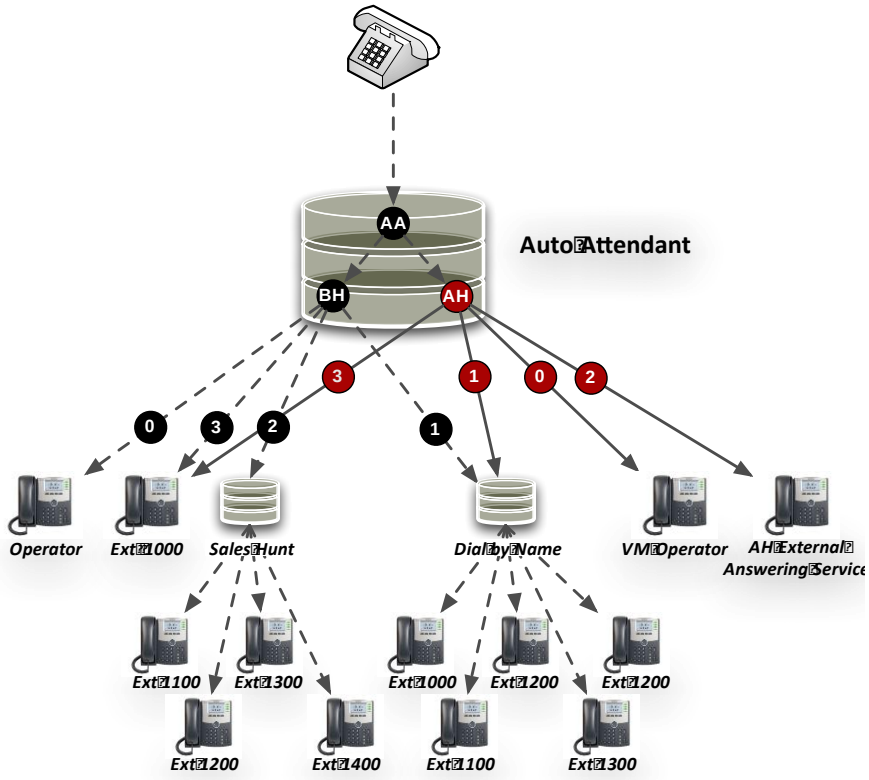
©2015 finocom AG / Placetel

Group administrators can fully configure the Auto Attendant to meet the specific needs of their organization. Configurable options include:

- Allow/Disallow Direct Extension Dialing – Provides ability for callers to dial a known extension at any time to connect with the user, without requiring additional prompts
- Enterprise Wide or Site Specific Dialing Options – Refines the list of available users and extensions to include with the Internal dialing options
- Schedule – Defines Days/Hours for normal business operations, as well as holidays. Supporting distinct greeting messages and routing actions for Business Hours vs. After Hours.
- Routing Actions
    - **Not Used:** The default when an action has not been select for that digit or character.
    - **Transfer to External Number, with or without prompt:** Routes callers to a configured phone number that is not a user or extension within the company.
    - **Transfer to Operator:** Routes callers to a configured operator. The designated operator will receive all calls that time out if the caller does not choose an option from the Auto Attendant.
    - **Dial by Name:** Enables callers to dial by a recipient's name.
    - **Dial by Extension:** Enables callers to dial by a recipient's extension.
    - **Repeat Menu:** If selected, this option will repeat the greeting and menu options.
    - **Exit Menu:** Allows a caller to exit the menu system. This will terminate the call.
    - **Transfer to Voice Mail:** Routes callers directly to the voice mailbox of the extension entered in the **Transfer To** field.
    - **Transfer to Internal Number, with or without prompt:** Routes callers to any user's phone number within the company. Optionally, you can elect to play a message prompt before the transfer is placed. This message is the playback of the user's name as recorded in the voice mailbox.
    - **Transfer to Extension, with or without prompt:** Routes callers to a configured extension. Optionally, you can elect to play a message prompt before the transfer is placed. This message is the playback of the user's name as recorded in the voice mailbox.

©2015 finocom AG / Placetel

Auto Attendant Example



1. A call is received into the Auto Attendant (AA) phone number,
2. The Auto Attendant (AA) answers the call and plays the appropriate greeting based on the time of day -Business Hours (BH) or After Hours (AH),
3. Caller then makes a selection by entering digits on their phone
   a. Business Hours
      0. Rings Operator
      1. Accesses Dial by Name directory
      2. Rings Sales teams Hunt Group
      3. Rings to specific extension
   b. After Hours
      0. Routes to Operators Voicemail
      1. Accesses Dial by Name directory
      2. Rings third party Answering Service

©2015 finocom AG / Placetel

Feature Prerequisites

Before the Auto Attendant service can be used the following conditions must be met:

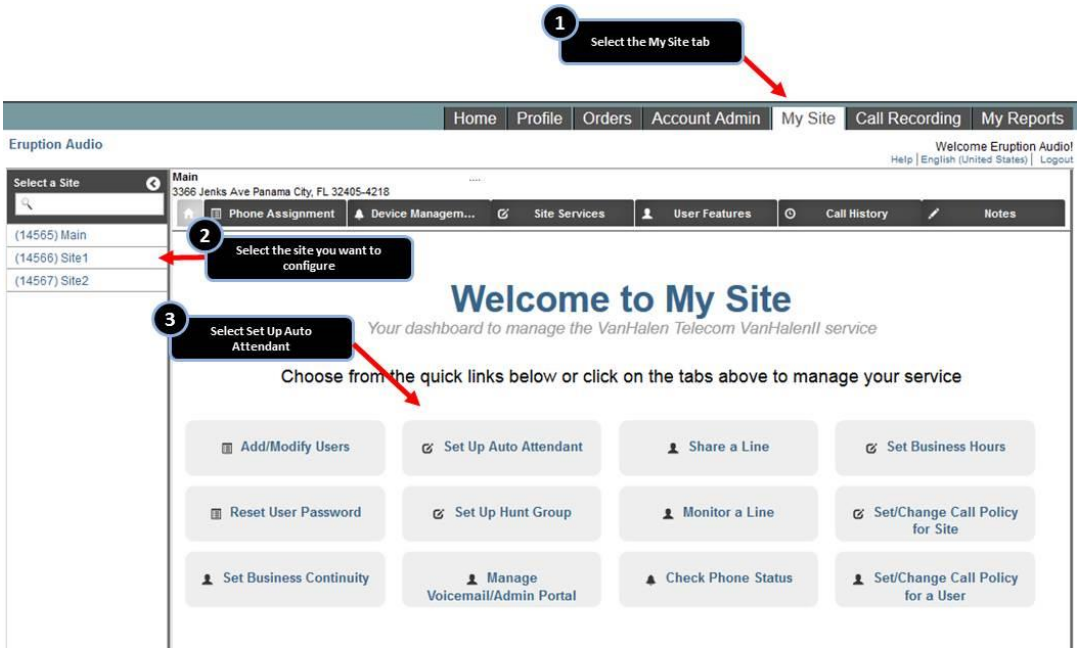
- At least one 2 Way DID must be assigned to the Auto Attendant and it must be active
- The Business Hours routing options greeting must be established

Feature Setup

Prior to using the Auto Attendant service, the Site administrator must set up the Auto Attendant Call Flow and Greetings for the callers to navigate through. Once logged into My Account, simply follow the steps detailed below.

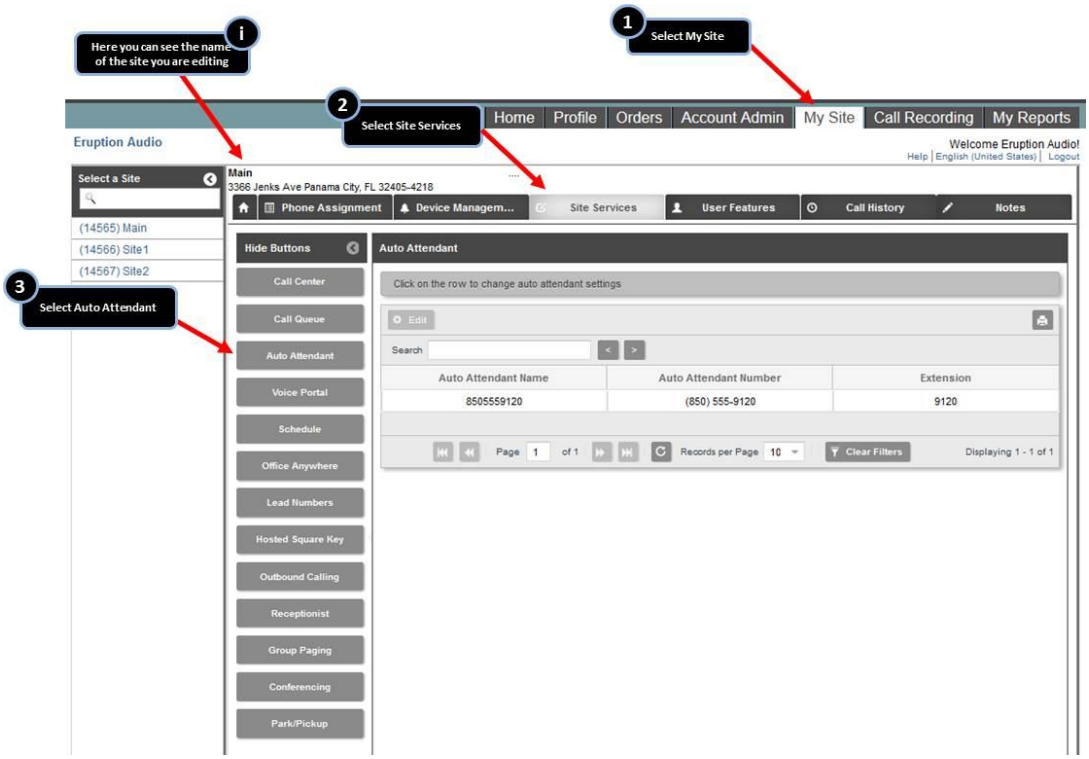
Step 1. Set Up Auto Attendant

1. Go to My Site
2. Select the appropriate Site to configure
3. Select "Set Up Auto Attendant"



©2015 finocom AG / Placetel

You can also get to the Auto-Attendant settings through the Site Services menu:



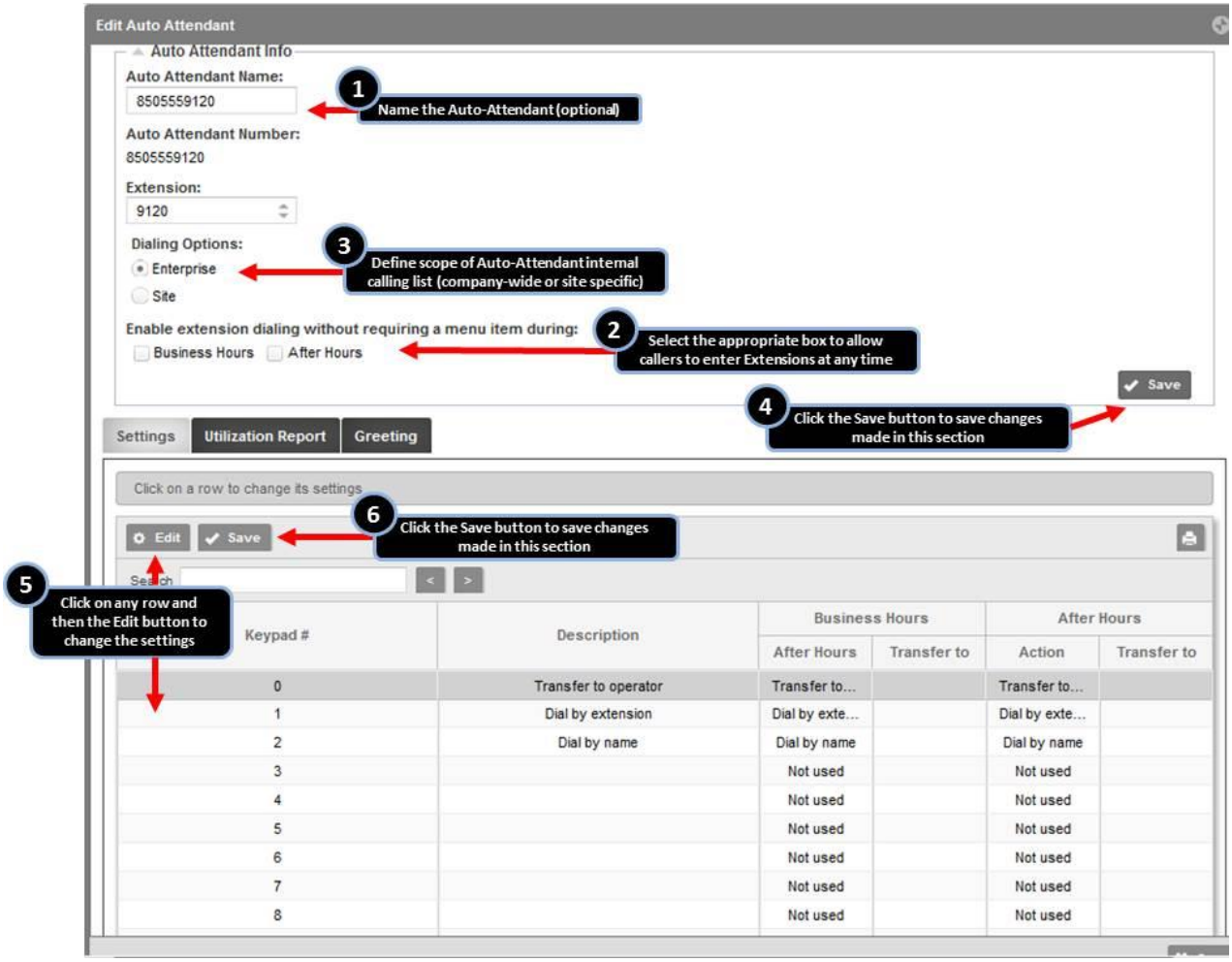
1. Go to My Site
2. Select the “Site Services” tab
3. Select “Auto Attendant”

Step 2. Select the Auto Attendant to Configure

1. Select the Auto Attendant to be configured. If you have a large list of them, you can also search.
2. Click the Edit button to open the configuration window

©2015 finocom AG / Placetel

Step 3. Configure the Auto Attendant



By default, the phone number assigned to the Auto Attendant will be displayed in the **Auto Attendant Name** field.

1. Replace the default number by entering a name for your Auto Attendant. Create a name that reflects the purpose of this specific auto attendant. E.g., "Main Line Auto Attendant." This is recommended but not mandatory. If desired, modify the **Extension** assigned to the Auto Attendant.
2. Select this checkbox to enable or disable extension dialing without selecting a menu item. This feature, when enabled, allows callers to reach users by dialing their extension anytime during the Auto Attendant greeting. This can be enabled or disabled for business hours, after hours, or both.
3. Select the Dialing Options.

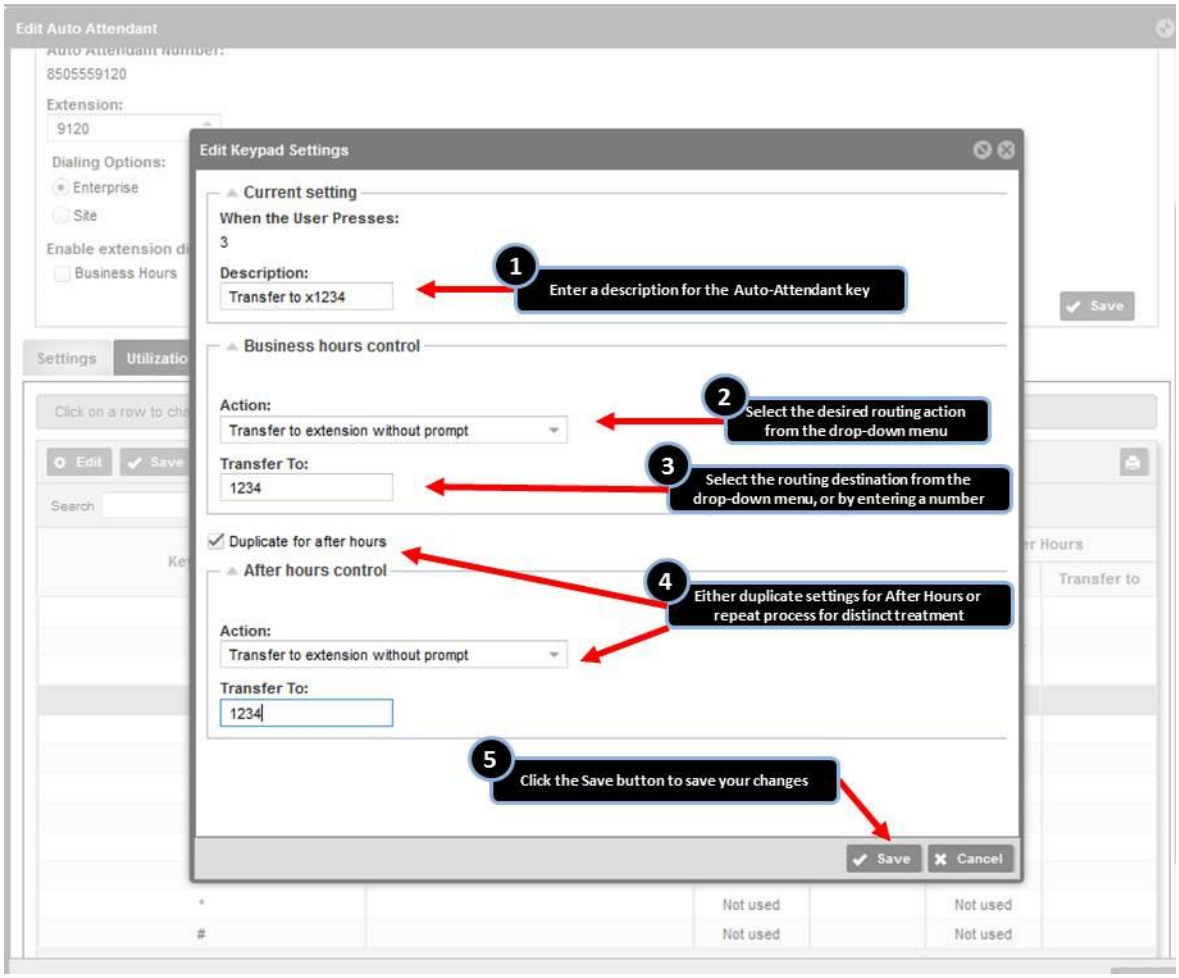
   Enterprise: If this option is selected, callers who reach the Auto Attendant and choose to dial by name or extension will be able to reach any user at any location within the entire company.

   Site: If this option is selected, callers who reach the Auto Attendant and choose to dial by name or extension will be able to reach any user located at the specific site associated with this Auto Attendant.
4. Click on the **Save** button to save changes made in this section.

©2015 finocom AG / Placetel

5. Click on any row and then the Edit button to change the settings for that keypress. This will open a pop-up window to edit those settings. See the Edit Keypad Settings section below.
6. Click on the **Save** button to save changes made in this section

Step 4. Configure the Auto Attendant (Edit Keypad Settings)



1. **Description:**
   - Enter text describing the location you would like the caller to reach when they press the corresponding number on their keypad. This will appear in the Description field to easily identify what you have the key configured to do.

2. **Select the action from the drop-down menu.**

   Action options include:
   - **Not Used:** The default when an action has not

©2015 finocom AG / Placetel

been select for that digit or character.

- **Transfer to External Number, with or without prompt:** Routes callers to a configured phone number that is not a user or extension within the company.
- **Transfer to Operator:** Routes callers to a configured operator. The designated operator will receive all calls that time out if the caller does not choose an option from the Auto Attendant.
- **Dial by Name:** Enables callers to dial by a recipient's name.
- **Dial by Extension:** Enables callers to dial by a recipient's extension.
- **Repeat Menu:** If selected, this option will repeat the greeting and menu options.
- **Exit Menu:** Allows a caller to exit the menu system. This will terminate the call.
- **Transfer to Voice Mail:** Routes callers directly to the voice mailbox of the extension entered in the **Transfer To** field.
- **Transfer to Internal Number, with or without prompt:** Routes callers to any user's phone number within the company. Optionally, you can elect to play a message prompt before the transfer is placed. This message is the playback of the user's name as recorded in the voice mailbox.
- **Transfer to Extension, with or without prompt:** Routes callers to a configured extension. Optionally, you can elect to play a message prompt before the transfer is placed. This message is the playback of the user's name as recorded in the voice mailbox.

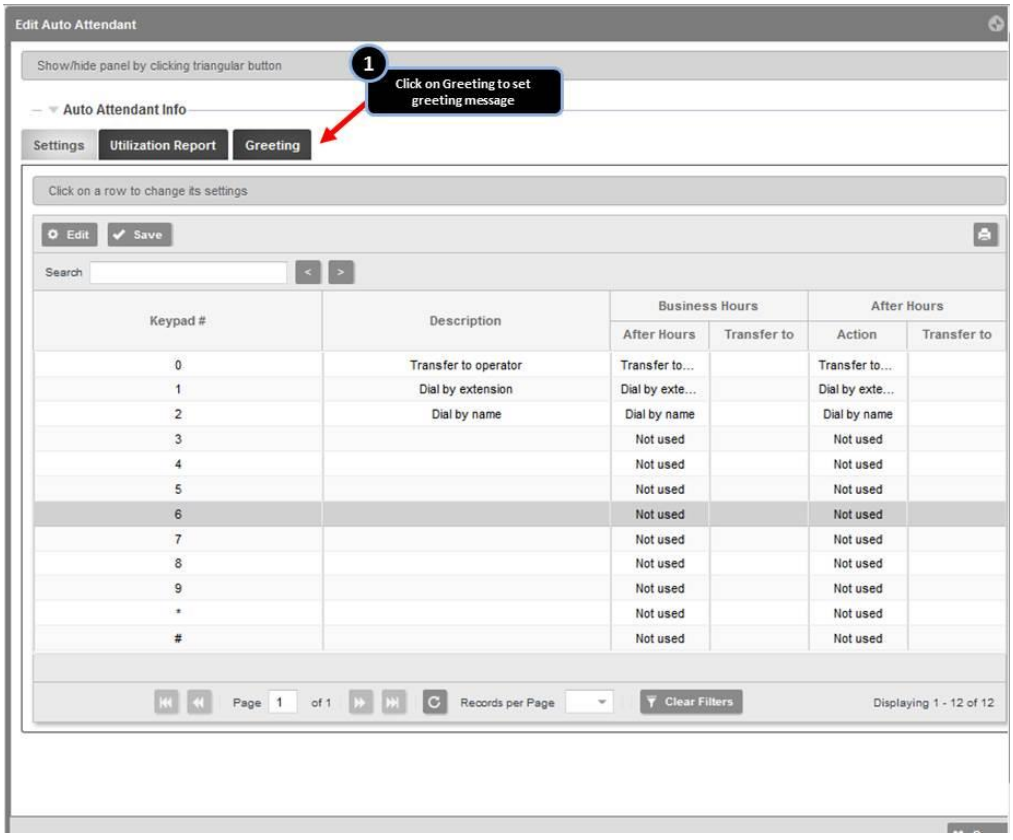
3. **Enter the destination to which the call should be** This only applies if the Transfer to Internal Number, Transfer to External Number, Transfer to Extension,

©2015 finocom AG / Placetel

transferred. Transfer to Operator, or Transfer to Voice Mail options are selected.

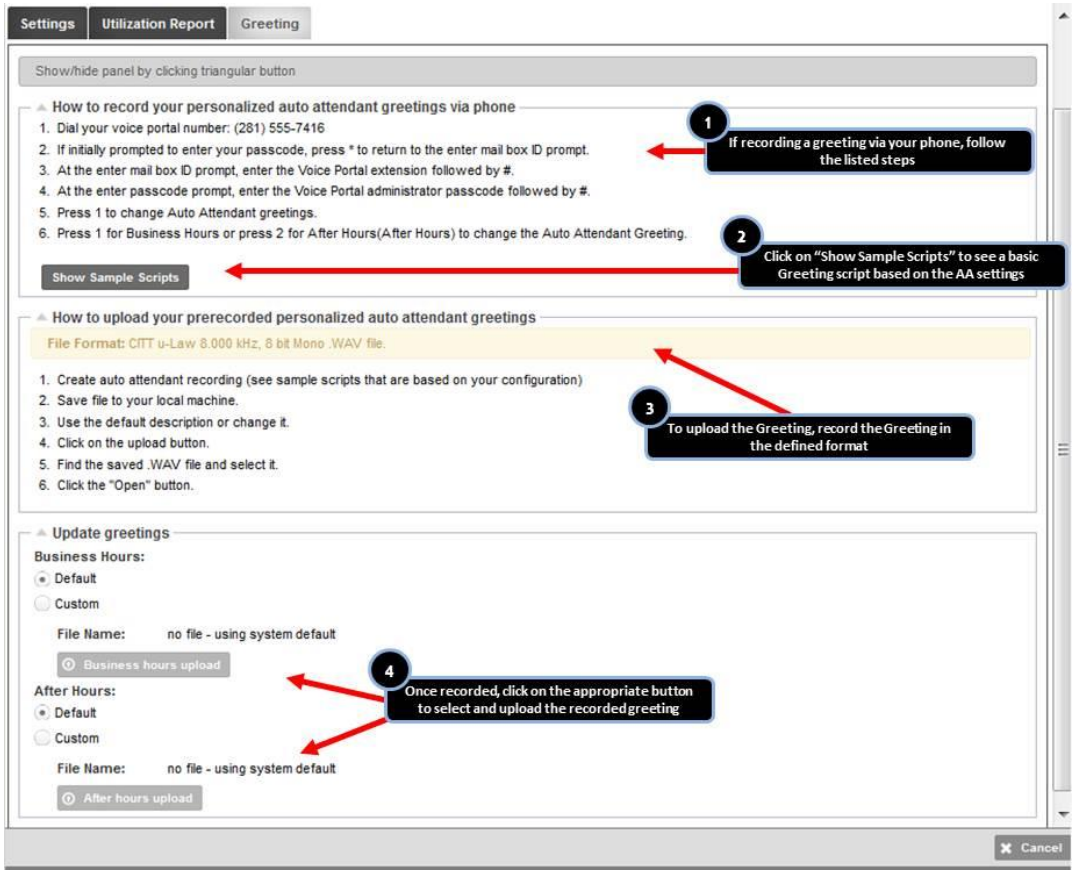
4. **Either duplicate settings for After Hours or repeat process for distinct treatment**
5. **Click "Save" to save the settings.**

Step 5. Review the Auto Attendant Settings and Load Greeting



©2015 finocom AG / Placetel

Step 6. Load Auto Attendant Greeting



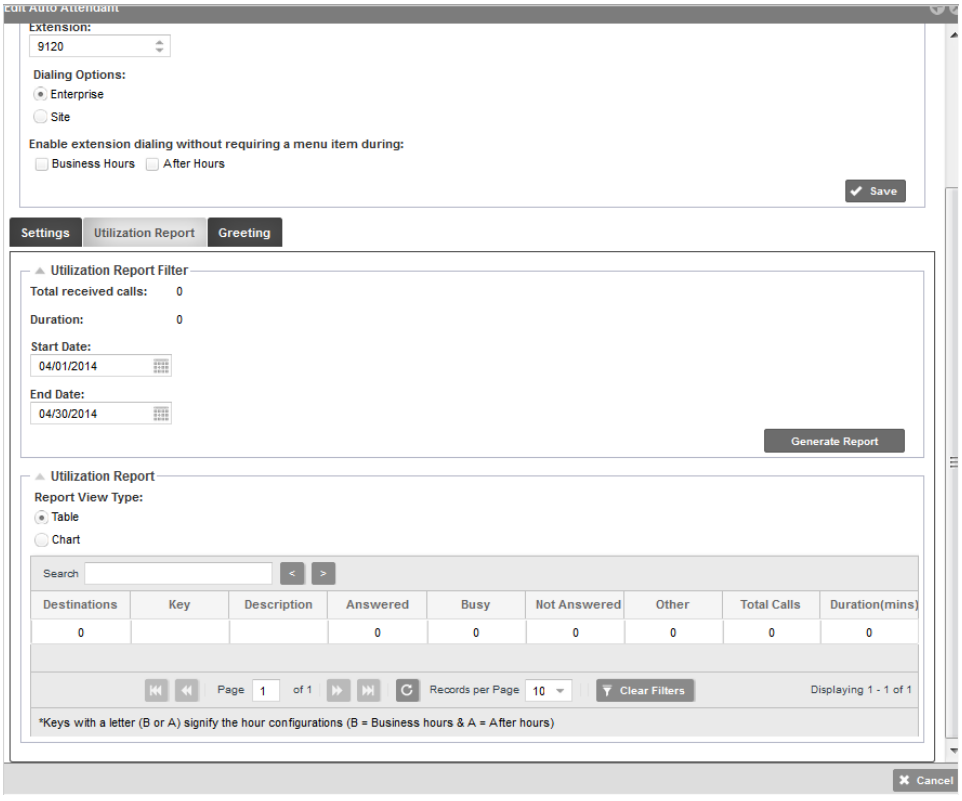
NOTE: For greeting files to properly upload, they must be saved as a .wav file in CCITT u-Law with 8.000 kHz, 8 bit Mono attributes. Using a basic sound converter will allow you to save your .wav file in this format.

©2015 finocom AG / Placetel

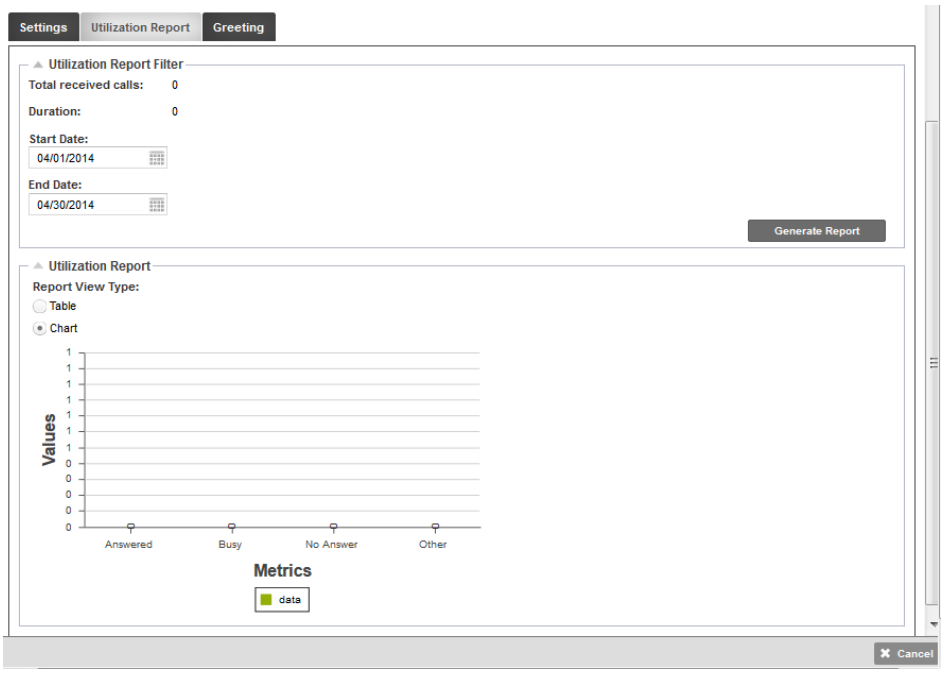
Reporting

In addition to providing the automated answer and routing solution, the Auto Attendant delivers call activity metrics allowing for greater visibility into historical call volumes and route choices. The metrics are reported using requested time periods, these include the following:

- Auto Attendant Stats
  - Destinations – Phone numbers to which the Auto Attendant has routed calls
  - Key – Auto Attendant Menu Key option related to phone number (if applicable)
  - Description – Auto Attendant Menu Key Description related to phone number (if applicable)
  - Answered – Total number of calls answered by user
  - Busy – Total number of calls that received Busy treatment after being routed to user
  - Not Answered – Total number of calls not answered by user
  - Other – Total number of calls falling outside the previous three categories of treatment. These would include transfers, routing to a voicemail station or routing to another auto attendant, queue or hunt group, etc.
  - Total Calls – Total number of calls routed to a specific phone number by Auto Attendant
  - Duration – Total number of minutes of active conversation via the Auto Attendant



©2015 finocom AG / Placetel



All reports are available online via MyAccount>MyReports.

©2015 finocom AG / Placetel