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Easy Auto Attendant User Guide.

Access **Business Hosted Voice**



**BUSINESS
SOLUTIONS**

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Username: _____

Password: _____

PIN: _____

Easy Auto Attendant.

Easy Auto Attendant is an automated receptionist service. When turned on, it answers your calls automatically, and offers your callers a list of options (a “menu”) that you define. You can allow your callers to listen to messages (such as your opening times), to leave a message, or to be transferred to a real person. All features are easily managed by business administrators through our **AccessPhone Web Portal** or by phone.

Easy Auto Attendant also includes a phone number that can be published.

If you wish, you can offer your callers different menus depending upon whether you are currently open or not. For example, when “Our Business” is closed, they might offer this menu instead.

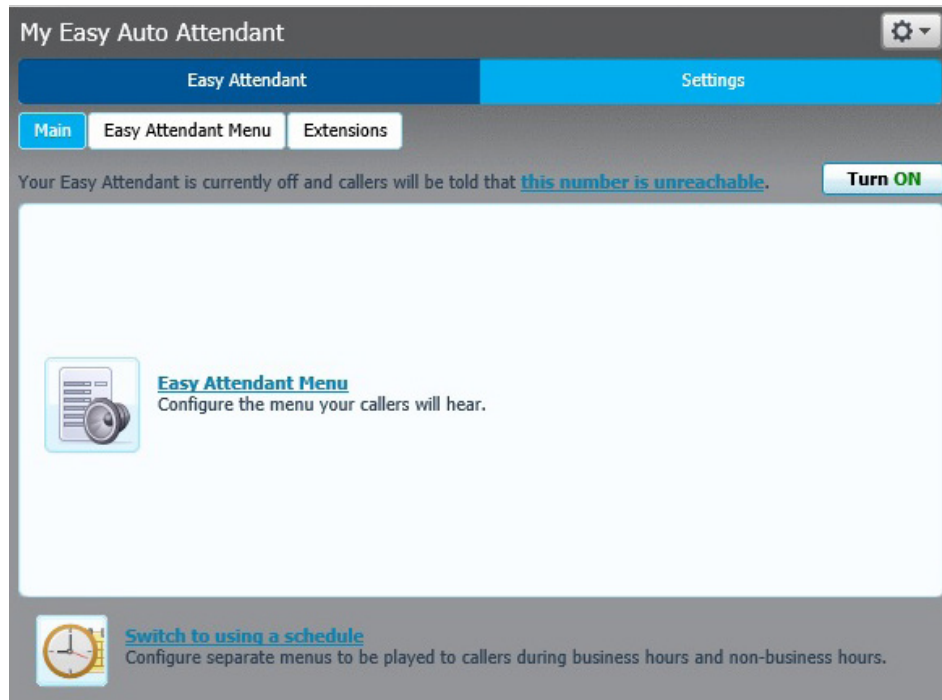
Welcome to “Our Business.”
We are open for business right now. For directions to our store, press 1. For office hours, press 2. For Sales, press 3. For the Service Centre, press 4. If you know the name of the person you require, press 5. Or, for any other inquiries please press 0.

Welcome to “Our Business”. Unfortunately we are currently closed. For directions to our store, press 1. For office hours, press 2. If you wish to leave a message, press 3, and we will get back to you as soon as possible. Thanks for choosing “Our Business”
Once you have told Easy Auto Attendant the hours and days that you open, it will automatically play callers the correct menu depending on when they call.



Initializing Easy Auto Attendant.

Easily access your Easy Auto Attendant through the AccessPhone Web Portal. Visit <http://phone.myaccess.ca> Your login information will be provided by your Account Manager.



Start taking control of your inbound calls by following these steps.

Step 1

Choose whether to offer your callers different menus during business hours and outside of business hours. The first time you configure Easy Auto Attendant, you will be asked to make this choice. If you have already been asked, and now wish to change your mind, see Switching Between Schedule/Single Menu Modes on page 13 before you follow the rest of these instructions.

Step 2

Configure a number to forward callers while your Easy Auto Attendant is turned off. If you skip this step, then until you have finished setting up the service, callers to your Easy Auto Attendant will be played a message saying that the number is unreachable.

Step 3

Configure the menu (or menus) that you wish to offer your callers.

Step 4

If (in Step 3) you chose to offer the option to dial by name, configure the names your callers can dial.

Step 5

If (in Step 1) you chose to use different menus during business hours and outside of business hours, configure your business hours.

Step 6

Record your initial greeting and any additional announcements.

Step 7

Turn on Easy Auto Attendant.

Configuring your menu(s).

Your Easy Auto Attendant menu configuration determines what options your callers are offered, and what announcements they hear.

If you have chosen to offer different options during business hours and outside of business hours, you will need to configure two separate menus:

Your “Business Hours Menu” and your “Non-Business Hours Menu.” If you have chosen to offer the same options at all times, you will need to configure a single “Easy Auto Attendant Menu”. In each case, you can select the menu or menus you need to configure using the corresponding tabs at the top of your Easy Auto Attendant page.

The configuration for an Easy Auto Attendant menu consists of the following:

- An initial greeting that you must record. This is the first thing that callers hear when your Easy Auto Attendant answers the call. This initial greeting welcomes your callers, and tells them what options are available.

Welcome to “Our Business.” We are open for business right now. For directions to our store, press 1. For office hours, press 2. If you know the extension of the person you require, press 3, and then enter the extension followed by the hash key. Or, for any other inquiries please press 0.

- Configure each button 1 to 9 plus 0 with the details of what should happen when a caller presses that option.

Configure a key to play an announcement and then record the announcement giving directions to the store.

The screenshot shows the 'My Easy Auto Attendant' configuration page. At the top, there are tabs for 'Easy Attendant' and 'Settings'. Under 'Easy Attendant', there are sub-tabs for 'Main', 'Schedule', 'Business Hours Menu', 'Non-Business Hours Menu', and 'Extensions'. The 'Business Hours Menu' and 'Non-Business Hours Menu' tabs are highlighted with yellow circles. Below the tabs, there are two main sections: 'Assign functions to each key on the caller's phone' and 'Record initial greeting'. The 'Assign functions' section has a list of 10 keys (1-0) with dropdown menus for actions like 'Play Announcement', 'Transfer to Phone', and 'Unassigned'. The 'Record initial greeting' section has a text area for the greeting and a 'listen/change' button.

Setting up your menu(s).

The following instructions describe how to set up your Easy Auto Attendant menu. If you have separate business and non-business hours menus, you will need to repeat these steps for each menu.

Step 1

Navigate to the menu configuration screen by clicking on the appropriate tab. For single menu attendant select “Easy Attendant Menu.” For multiple menus, select “Business Hours Menu” and “Non-Business Hours Menu”.

Step 2

Configure the options that you want to offer to your callers. The menu configuration screen lists the keys 1-9 and 0. Alongside each key, you will see a drop down box, which you can use to select what will happen when a caller presses that number on their phone.

For each option that you wish to offer your callers, decide which key they will press to access it, and select the appropriate option from the corresponding drop down. For each key, with the exception of key 0. You can choose from the following options.

If you want to play an announcement describing your opening hours when a caller presses 2, you would assign key 2 to “Play announcement”.

Unassigned • If a caller presses this key, they will be told that the option is not recognized.

You might want to allow callers to press 4 to speak to a sales representative.

Play announcement • If a caller presses this key, they will be played a message that you have recorded. If you assign a key to Play Announcement you must also record the announcement you want to play, either by clicking on the record that appears to the right of the drop down, or by dialing the appropriate service access number from your telephone. See Recording Announcements on page 14.

Transfer to phone • If a caller presses this key, they are transferred to any local phone number of your choice. You must also enter the phone number you wish to transfer to in the box that will appear to the right of the drop down. Enter the phone number exactly as you would dial it from a phone.

If you assign key 4 to dial by name, then your initial greeting should include wording similar to: if you know the name of the person you require, press 4, and then enter the name followed by the hash key.

Dial by name • If a caller presses this key, they can choose who they want to speak to within your organization by dialing their name. If you assign a key to dial by name, you must also do both of the following.

- Define the set of extensions that your callers can enter, their names and the phone numbers that each will transfer to.

Note: Do not attempt to do this until you have finished configuring your menu, and have applied your changes in step 4.

- Give your callers suitable instructions as part of your greeting

(which you will record in step 3).

Setting up your menu(s).

Transfer to voicemail

If a caller presses this key, they will be transferred directly to a voice mailbox of your choice and invited to leave a message. You must also enter the phone number of the mailbox you wish to transfer to in the box that will appear to the right of the drop down. The number you enter must be the 10 digit phone number of a mailbox provided by Access.

You might want to allow callers to press 5 to leave a message for one of our sales team.

The only action you can assign to key 0 is Transfer to phone. Traditionally, key 0 is used to offer the option of speaking to a receptionist or someone that can handle general inquiries.

Step 3

Record your initial greeting either by clicking on record button in the “Record initial greeting” panel, or by dialing the appropriate service access number from your telephone. See Recording Announcements on page 14.

Your initial greeting should describe all of the options that your callers can select - so it should mention each key that you have set to something other than Unassigned in step 2.

Step 4

Apply the changes you have made to your menu configuration by pressing the Apply Button at the bottom of the screen.

After you have set up your configuration, you can change it at any time by reassigning keys or updating announcements. If you change the options that you offer to your callers, remember to re-record your initial greeting as well!

Configuring the name callers can dial.

If you have chosen to offer your callers a “dial by name” option, then you must define the set of names they can dial. For each name you must specify the extension number (a short number of your choice, such as 107), the extension’s name and the phone number that your caller should be transferred to if they dial this name. To configure your extensions, click on the Extensions tab at the top of the Easy Auto Attendant page in the AccessPhone Web Portal.

To add a new extension, click the “Add Extension” button. You will then be prompted for the following.

Extension • This is the extension number. It can be any number of your choice between one and seven digits long. It must not be the same as any other extensions you have already configured.

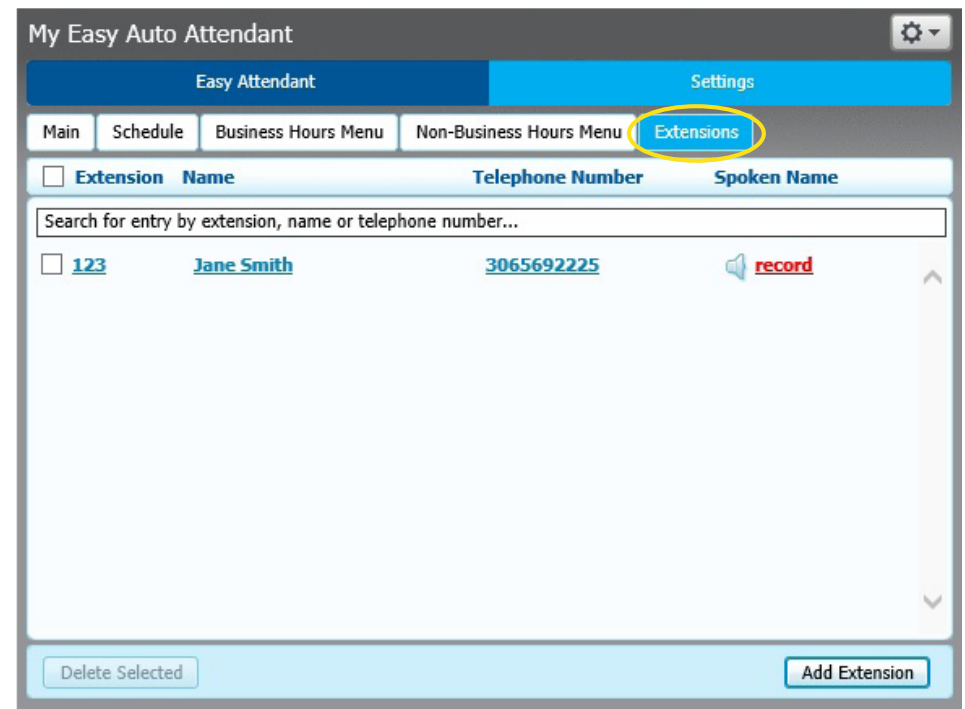
For example, if there are two extensions called “John” and the caller enters “John”, they hear the full names of both the extensions and can choose between them. Extensions that don’t have a spoken name recorded can’t be reached by “dial by name” options.

Name • This is the name that your callers will dial. Both the first and last name must contain at least 2 dial-able characters.

Telephone Number • This is the number that callers will be transferred to if they dial this name. Enter the phone number exactly as you would dial it from a phone.

You will also be prompted to record a spoken name for this extension. This is played to callers if they enter a name that is not unique to allow them to refine their search.


To delete existing extensions, select the check box alongside the extension you wish to delete, and then press the “Delete Selected” button.



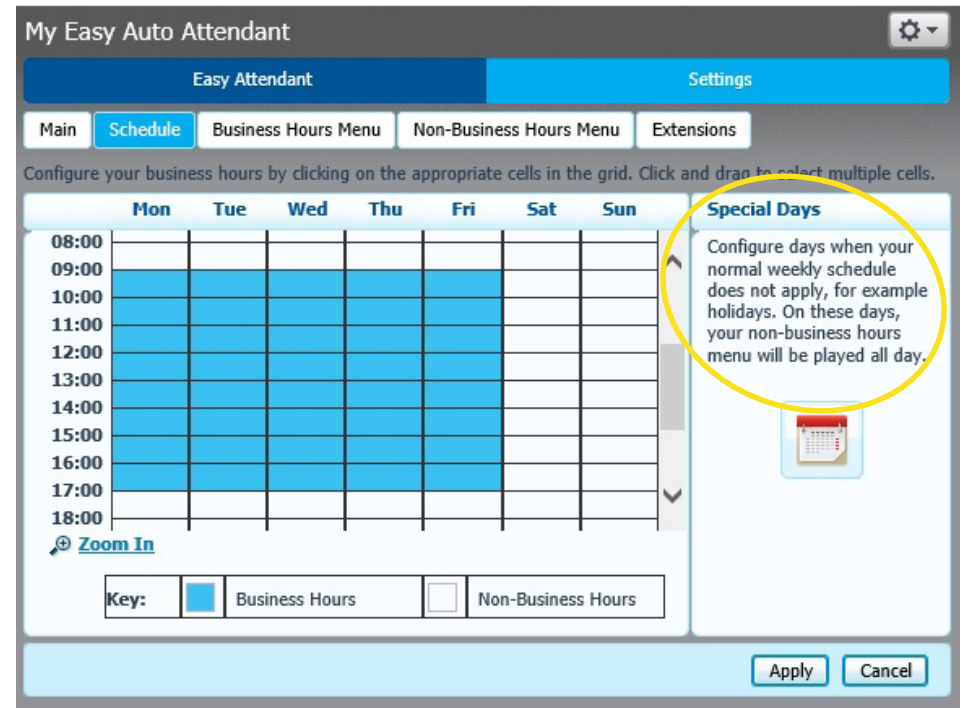
Configuring your business hours.

If you have chosen to offer your callers different options during business hours and outside of business hours, you must configure a business hours schedule. This tells Easy Auto Attendant what your business hours are, so that it can automatically offer callers the correct menu based on when they are calling. To configure your schedule, navigate to the Schedule tab at the top of the Easy Auto Attendant page in the AccessPhone Web Portal.

There Are Two Parts To Configuring Your Schedule

- Configure your normal business hours, for each day from Monday to Sunday. To do this, simply “colour in” the grid with the hours that you work by clicking on the appropriate cells. Clicking on a cell in the grid toggles it between business hours and non-business hours. You can change several cells at once by clicking and dragging.
- Configure any special one-off dates when your business will be closed. To do this, click on the  button to bring up the calendar control, and select dates when you will be closed by clicking on them. If you always close on public holidays, you can easily select all of these by clicking on the “Add public holidays” button.

When you have finished, press “Apply” to save your changes.

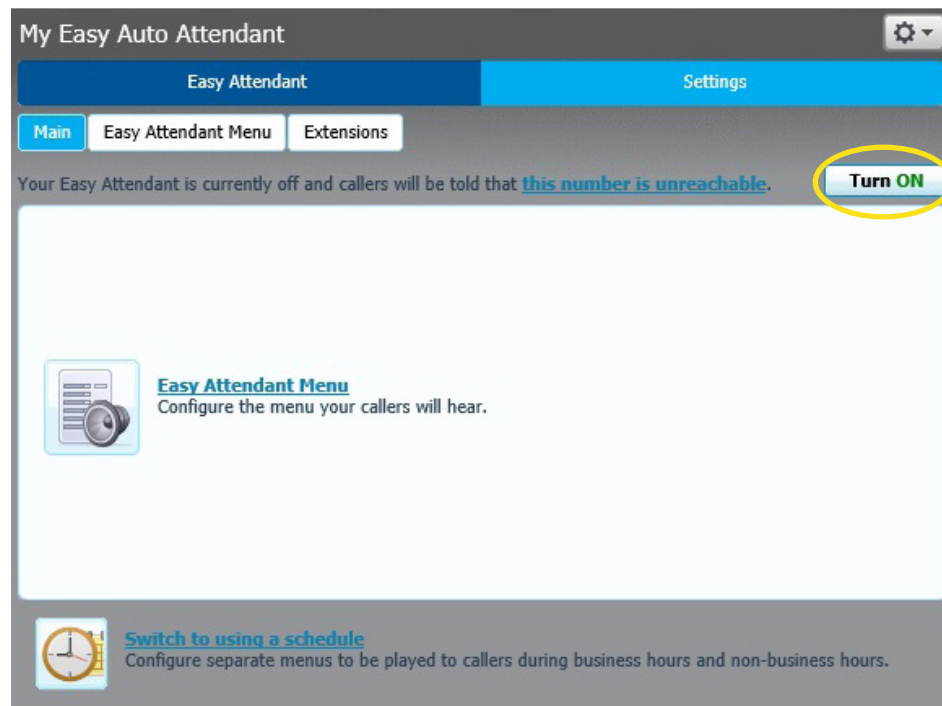


The screenshot shows the 'My Easy Auto Attendant' interface. At the top, there are tabs for 'Main', 'Schedule', 'Business Hours Menu', 'Non-Business Hours Menu', and 'Extensions'. The 'Schedule' tab is active. Below the tabs, there is a grid for configuring business hours. The grid has columns for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun) and rows for time slots (08:00, 09:00, 10:00, 11:00, 12:00, 13:00, 14:00, 15:00, 16:00, 17:00, 18:00). The cells for 09:00-17:00 on Mon-Fri are highlighted in blue, indicating business hours. To the right of the grid is a 'Special Days' section with a calendar icon and a text box that says: 'Configure days when your normal weekly schedule does not apply, for example holidays. On these days, your non-business hours menu will be played all day.' At the bottom of the interface, there are 'Apply' and 'Cancel' buttons. A 'Zoom In' button is also visible below the grid.

Turning On/Off.

To turn your Easy Auto Attendant on or off, navigate to the Main tab at the top of the Easy Auto Attendant page in the Access**Phone Web Portal**, and click on the button labeled Turn ON or Turn OFF.

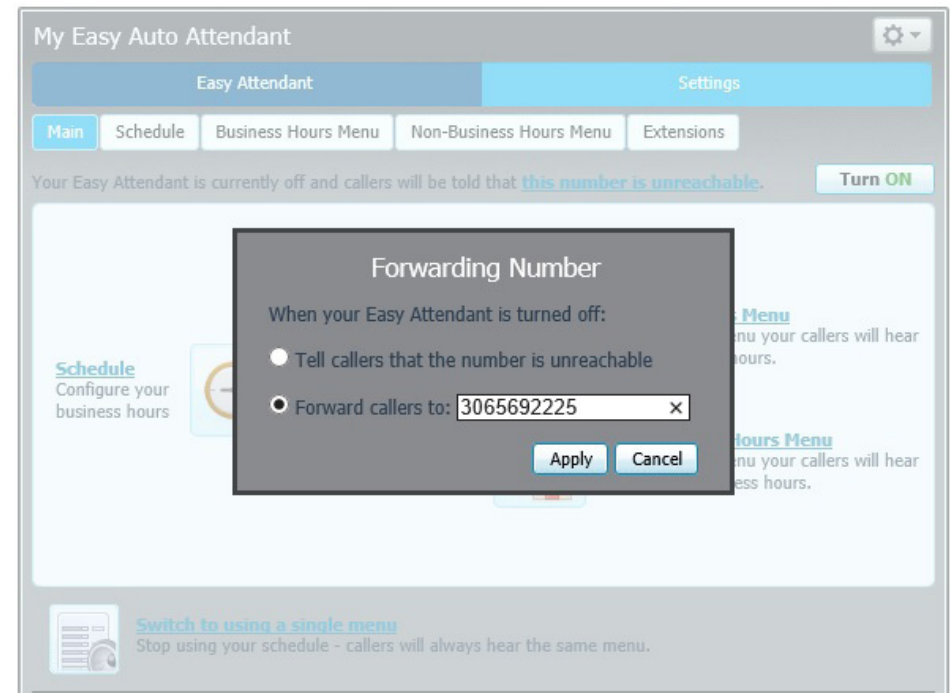
When your Easy Auto Attendant is turned off, callers will either be played an announcement telling them that the number is unreachable, or forwarded to a number of your choice. Many users will leave their Easy Auto Attendant turned on all of the time, but (depending upon how Easy Auto Attendant has been deployed) you may, for example, wish to turn Easy Auto Attendant off during the day and forward your callers directly to a live receptionist instead.



When your Easy Auto Attendant is turned off, you can choose either for callers to

- Be played a message telling them that the number is unreachable
- Be forwarded to an alternative number

To change this setting, your Easy Auto Attendant must first be turned off. The text at the top of the main Easy Auto Attendant tab will then read either “Your Easy Auto Attendant is currently OFF and callers will be told that this number is unreachable”, or “Your Easy Auto Attendant is currently OFF and callers are being forwarded to <number>”. To change the current setting, click on the link included in this message.



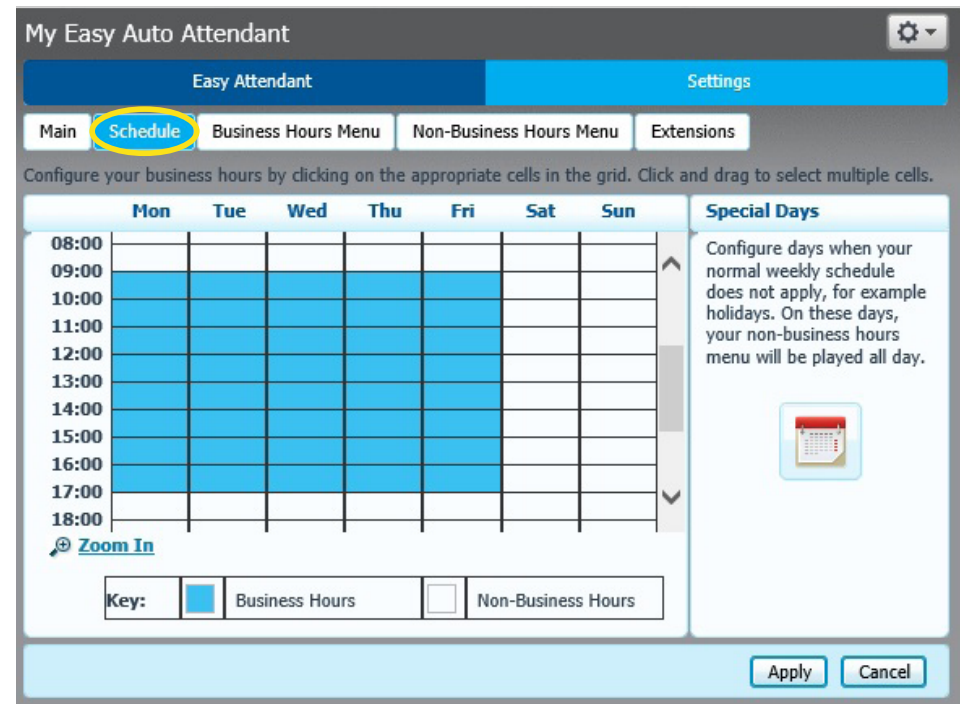
Switching between schedule/single modes.

Easy Auto Attendant has two different modes.

Schedule mode • In schedule mode you set up two separate menus - one for use during business hours, and one for outside of business hours. The system then automatically plays the correct menu to a caller depending on when they call. For example, during business hours you might want to offer your callers a choice of people to speak to. Outside of office hours, you might instead want to offer the option of leaving a message.

Single menu mode • In single menu mode, you set up just one menu. All callers will hear the same menu regardless of the time of day.

You can switch between these modes at any time.



The screenshot shows the 'My Easy Auto Attendant' interface. At the top, there are tabs for 'Easy Attendant' and 'Settings'. Below these are sub-tabs: 'Main', 'Schedule' (highlighted with a yellow circle), 'Business Hours Menu', 'Non-Business Hours Menu', and 'Extensions'. A instruction reads: 'Configure your business hours by clicking on the appropriate cells in the grid. Click and drag to select multiple cells.'

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
08:00							
09:00	■	■	■	■	■		
10:00	■	■	■	■	■		
11:00	■	■	■	■	■		
12:00	■	■	■	■	■		
13:00	■	■	■	■	■		
14:00	■	■	■	■	■		
15:00	■	■	■	■	■		
16:00	■	■	■	■	■		
17:00	■	■	■	■	■		
18:00							

Special Days

Configure days when your normal weekly schedule does not apply, for example holidays. On these days, your non-business hours menu will be played all day.

Key: ■ Business Hours □ Non-Business Hours

Buttons: Apply, Cancel

Switching between schedule/single modes.

Switching from single menu mode to schedule mode.

- Navigate to the Main tab at the top of the Easy Auto Attendant page in the Access**Phone Web Portal**.
- If Easy Auto Attendant is currently turned on, you must turn it off (by clicking on the “Turn OFF” button) before proceeding. The service will be turned off for a while as you set up your new configuration, so you may wish to forward callers to an alternative number whilst you carry out the rest of this procedure.
- Click on the “Switch to using a schedule” link.
- In schedule mode, you will have two separate menus - one for use during business hours and one for during non-business hours. If you have already defined a menu (when running in single menu mode) you can keep this and use it as the starting point for one of the two menus you will be using from now on. You can of course subsequently change it if required.
- You are now running in schedule mode. Before you can turn Easy Auto Attendant on again, you must configure your business hours menu, your non-business hours menu and your schedule. This is very similar to setting up Easy Auto Attendant for the first time, except that you may already have some configuration for one of your menus.

Switching from schedule mode to single menu mode.

Warning: in schedule mode, you have two separate menus - one for use during business hours and one for use during non-business hours. Switching to single menu mode will cause one of these menus to be permanently deleted (you can choose which one you wish to keep). Switching to single menu mode will also permanently delete any business hours schedule you have configured. If you subsequently wish to return to schedule mode, you will need to set these up again.

- Navigate to the Main tab at the top of the Easy Auto Attendant page in the Access**Phone Web Portal**.
- You may wish to turn Easy Auto Attendant off, and optionally forward callers to an alternative number whilst you carry out the rest of this procedure.
- Click on the “Switch to using a single menu” link.
- If you had previously set up both your business hours menu and your non business hours menu, you will be asked which one you wish to keep. The other menu is permanently deleted.

Recording announcements & initial greeting.

When using Easy Auto Attendant, all messages that are played to your callers must be recorded by you in advance. At the very least, this requires you to record an initial greeting, but you may also wish to record a number of other announcements giving your callers information such as your opening hours.

[See Configuring Your Easy Auto Attendant Menus on page 4.](#)

Easy Auto Attendant offers two ways to record your messages.









- If your computer has a sound card and microphone, you can use these to record your messages directly from the Easy Auto Attendant page in the AccessPhone Web Portal.
- Alternatively, if you do not have the necessary equipment (or if you simply prefer), you can record your messages using your telephone.

Recording messages directly from your computer

Anywhere you see record button you can click on the link to bring up the announcement recording control. This allows you to record your message directly via your computer's microphone or upload audio file.

Once you have recorded a message, the record button will change to listen/change. Clicking on this will again bring up the announcement recording control, which will enable you to play back download, record or upload your announcement.





A number of controls are provided for recording your message.

-  Starts recording. This will overwrite any message you have previously recorded.
-  Stops recording the message.
-  Plays back your recorded message. This action will be unavailable if you have not yet recorded a message.
-  Stops playing the message.
-  This control allows you to adjust the gain of your microphone. Click and then adjust the slider to set the required volume level.
-  While recording, the lights above this control will show how loud the signal is from your microphone. If the gain is set correctly then several green lights should appear while you are recording. If only one or two appear, then the gain is set too low and your message will be too quiet. If red lights appear then the gain is set too high and your message will be distorted.
-  This control allows you to adjust the playback volume. Click and then adjust the slider to set the required volume level.
-  This control allows you to view and change your Adobe Flash Player Settings, for example to adjust the settings for your microphone.

When you first attempt to record a message, an "Adobe Flash Player Settings" overlay will appear. Ensure that the "Allow" radio button is selected, and if you do not wish to be shown these settings in future tick the "Remember" check box.

Recording announcements & initial greeting.

To record a message you need to carry out the following steps

- When you are ready to record your message, press the  button.
- Read your message into your microphone, and when you have finished, press the  button.
- Playback your message to check that it has recorded correctly by pressing the  button. If you want to stop the playback, press . If there is a problem with the recording, e.g. you cannot hear it, or it is very quiet, see the section on troubleshooting below.
- If you are not happy with your message content, then record a new message by pressing the record button again. This will overwrite your previous message.
- Click Save to save your new announcement.

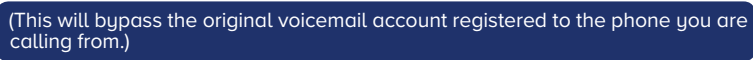
Recording messages using your telephone.

If you wish to record your initial greeting and announcements using a telephone:

Enter the Access Voicemail Center:

Option 1

To record your Auto Attendant from your Polycom Handset

1. Dial *98
2. Enter *  (This will bypass the original voicemail account registered to the phone you are calling from.)
3. Enter Phone Number
4. Enter the PIN Number
5. Follow the Prompts

Option 2

To retrieve voicemail remotely

1. Dial 306-559-6245 (Regina)
2. Enter: Phone Number
3. Enter the PIN Number

- Once you have configured your menu options, press “Apply” as usual to save your changes. You will be warned that you have not yet recorded an initial greeting, and if you have assigned any keys to “Play announcement”, you will also be warned that you have not recorded the announcements to play. Ignore this warning.

Note: if you wish to offer your callers the option to listen to announcements in your Easy Auto Attendant menu, you must use the Web interface to assign the appropriate keys to “Play announcement” before you can use your telephone to record the announcements you wish to play.

- If the attendant is on and playing the initial greeting. Dial the Easy Auto Attendant phone number. Press *6 during the greeting and enter the pin. Follow the menu prompts. Select the appropriate options from the menu you will hear. You will be given the opportunity to record your initial greeting, as well as the announcements for any “Play announcement” keys you have set up.
- If your attendant is off dial into one of the voicemail access numbers below, enter your Easy Auto Attendant phone number and pin. Follow the menu prompts.

Voicemail access number.

Balgonie	306-702-6245	Melville	306-707-6245
Battlefords	306-499-6245	Midale	306-913-6245
Bienfait	306-300-6245	Milestone	306-919-6245
Canora	306-710-6245	Regina*	306-559-6245
Esterhazy	306-701-6245	Weyburn	306-870-6245
Estevan	306-687-6245	Yorkton	306-708-6245
Kamsack	306-709-6245		

*includes Coppersands, White City, Emerald Park and Pilot Butte

Troubleshooting.

I have recorded my message, using my computer but when I try to play it back I cannot hear anything.

- Check you have actually recorded something. The length of the current recording is shown as e.g. 0:01:35 (1 minute and 35 seconds). If the current recording length is 0 or much lower than expected then try recording your message again.
- Check that playback volume is turned up high enough. Volume can be adjusted using the volume slider described above.
- Try re-recording the message, and as you are recording, watch the lights on the player.
- If no lights appear, or only one or two appear, then check the following.
- Increase the gain of your microphone by clicking and moving the gain control nearer to the top end.
- Click the settings icon to bring up the “Adobe Flash Player Settings” and make sure that the Allow option is selected. Click on the microphone icon at the bottom of this settings box and check that the correct microphone is selected in the drop down, and that the record volume is turned up.
- If you are using an external microphone, check that this is plugged in correctly.
- If this still doesn’t solve the problem, then it may be that your microphone has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.
- If several green lights appear consistently while recording your message, then it is likely that your message has recorded correctly and the problem is occurring when playing it back. If you are using external speakers, check that these are plugged in correctly and turned on. If this does not resolve the problem, then it may be that your speaker has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.
- Try recording through the telephone interface.

I have recorded my message, but when I try to play it back it is distorted.

- This may be because your microphone gain is set too high. Reduce the gain by clicking the microphone icon and sliding the gain control nearer to the bottom.

I have recorded my message using the telephone, but I cannot hear anything or the quality is low.

- The quality of your phone, headset, or service may impact the quality of your recording. We recommend you do not use a cellular device or speaker phone while recording announcements.



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