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XO IP Flex, IP Flex with VPN, SIP Service

Services Auto Attendant Feature

For Group Administrators

Also known as the automated receptionist, the Auto Attendant answers the phone and routes incoming calls. Auto Attendant provides your organization with a simple, powerful and flexible tool to manage inbound calls and deliver them to the intended destination through automated interactions with the caller.

About This Feature

The feature is integrated with your XO VoIP service and does not require a third-party system. Since the telephone system recognizes Auto Attendant as a user, Auto Attendant can have assigned services, receive calls, transfer calls, or deflect calls to other users.

Prerequisites

You must purchase the Auto Attendant feature to have it provisioned by XO; it cannot be turned on or off within the XO Business Center.

One location may have multiple Auto Attendants, and there is a charge for each. Once the feature is provisioned by XO, you may access and activate, and configure the feature in Online Feature Management.

Auto Attendant Number

XO Care will assign you with a number for Auto Attendant. This is the main Auto Attendant number (sometimes called the pilot number). This number is different than the location main number. XO Care must assign all new Auto Attendants.

How Auto Attendant Works

A caller reaches the Auto Attendant by dialing an associated phone number or an extension. Once connected to the Auto Attendant, the caller hears a greeting providing a menu of options to determine call routing. The menu is configurable by the designated group administrator and can provide up to nine caller options including:

- One-key dialing – The caller presses a pre-defined, push-button key to reach a particular phone number or extension within the group or to build multi-level menus.
- Operator dialing – The caller presses a pre-defined, push-button key to reach an operator.
- Name dialing – The caller spells the name of the intended party through the numerical push-button keypad. Upon identifying a unique match, the caller hears the name of the called party and is transferred. Users have the ability to record their name for playback when a caller dials by name or extension.
- Extension dialing – The caller enters the extension of the intended party through the numerical, push-button keypad. The caller then hears the name of the called party before the call gets transferred to that person. The XO default is a 4-digit number for extension dialing.
- Immediate Extension Dialing- The group administrator may elect to allow callers to dial an extension from the first-level menu. The First-Level Extension Dialing option allows the administrator to enable or disable immediate extension dialing for a given Auto Attendant.

    When the feature is enabled, the caller can dial the desired extension right away on the first level of the Auto Attendant, without having to first navigate to the second-level of the menu.

Ways to Use This Feature

You can use the Auto Attendant with other XO VoIP features such as Call Center to create custom solutions that address specific business needs. For example, you may choose to set up the Auto Attendant as a:

- Front-office attendant—This attendant is the central point for incoming calls. It dispatches calls to their intended destination using Inbound Call Routing capabilities.

    In this scenario, you can configure profiles for business and after-hours.
- Multi-level attendants—To make it easier for callers, you can have multiple attendants in a group (organized in a hierarchical fashion), as long as the phone numbers are assigned to the location where the Auto Attendant is deployed. You can layer Auto Attendants in this fashion up to a maximum of 60 Auto Attendants per location.

    » Example: The highest-level attendant may offer a menu of departments (press 1 for sales, press 2 for marketing, etc), and each department can have its own attendant, offering a menu of available functions or employees (press 1 for Joe in the East region, press 2 for Sam in the West region, etc.).

- Personal attendant—In the example above, If Joe is not available to take the call, the attendant will invite the caller to leave a voice mail or transfer to an alternate destination. In this scenario, you can configure voice mail to be picked up by a front-office Auto Attendant, or you may "personalize" Joe's attendant with menu options.
- Support Center's attendant—You can configure this attendant to screen Support Center calls to help ensure that they are directed to the appropriate subject-matter expert (Example: press 1 for a problem with phone, press 2 for assistance with a service, etc.)

Scheduling Auto Attendant at Different Times of Day

You may choose to have the Auto Attendant answer the phone and route incoming calls at all times, specified times or only when no one is available to answer the phone. Auto Attendant can answer in many ways:

- Answer Always: You can set up a schedule under Schedules > Time Schedules – or –

- Answer Always: You may set your XO VoIP location main number to Call Forward to the Auto Attendant pilot number when no one is available to answer the phone, and then un-forward when you no longer wish to have the Auto Attendant answer calls

- Answer During Business Hours: You must set up a Business Hours schedule under Schedules > Time Schedules, then, you may choose the preconfigured Time Schedule from the drop-down menu. The Auto Attendant will play the Business Hours greeting during the designated Time Schedule.

- Answer After Business Hours: You must set up an After Business Hours schedule under Schedules > Time Schedules. Then, you may choose the preconfigured Time Schedule from the drop-down menu. The Auto Attendant will play the After Hours greeting during the designated Time Schedule.

- Answer During Other Times: You must set up an holiday or time based schedule under Schedules > Time Schedules then, you may choose the preconfigured Holiday Schedule from the drop-down menu. Once selected, the Auto Attendant will play the holiday greeting during the holiday, instead of the Business Hours or After Hours greeting.

Note: To use Times Schedules and/or Holiday Schedules with your XO VoIP Auto Attendant, you need to set those up first before configuring the Auto Attendant, To do this, select Holiday and Time Schedules from the navigation bar.

How To Access Auto Attendant

OFM Home > Auto Attendant

Figure 1: Accessing Existing Auto Attendants
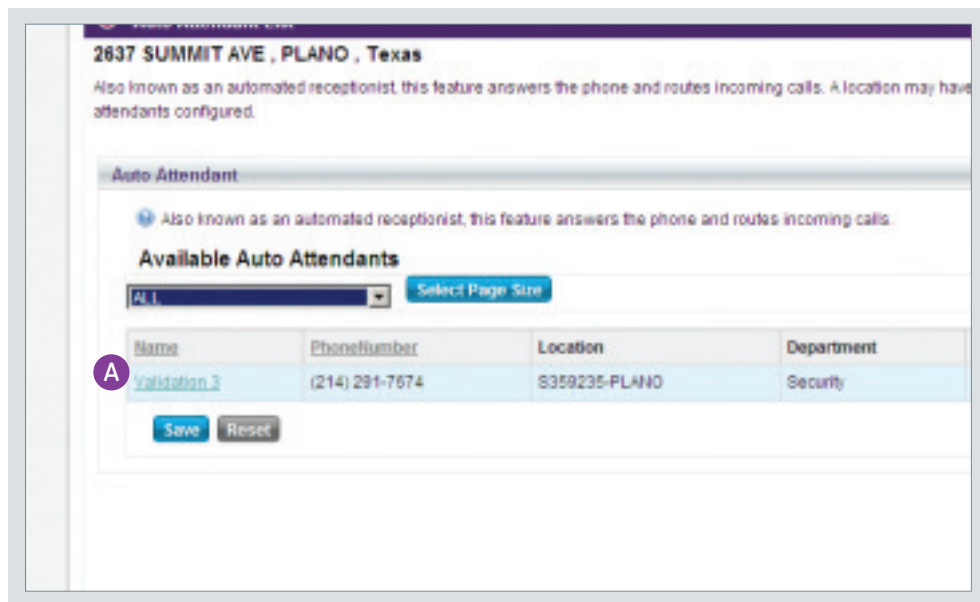
A Choose the name of the Auto Attendant you want to modify. This will take you to the General Settings page, Figure 2.

Configuring General Settings for Auto Attendant

Figure 2a: General Settings for Existing Auto Attendant

1 Business Hours Menu Options and After Hours Menu Options tabs allow you to edit key information about how you want calls responded to by the Auto Attendant during or after business hours.

2 Call Forwarding Selection allows you to set up rules for call forwarding.

A The calling Line ID Name is not seen outside of your company, this is for your internal use only. You cannot edit this number.

B Assign a name. Note: Main (entry) menus are not assigned a department. (If you want to restrict name dialing to extensions within the same department, you need to build an Auto Attendant for each department first, and then assign users to departments.)

C Assign a department. You only need to assign a department if you are using multi-level Auto Attendants, or if you wish to restrict name dialing.

D Select the time zone that matches the Auto Attendant location.

E Use the Name Dialing Entries to define how a caller should spell the name of the person they want to reach: by Last Name and First Name, or a Combined First Name and Last Name, or both

F Use the Scope of Extension Dialing and Scope of Name Dialing to define how callers can reach people in your organization. If checked, you are restricting callers to dialing by the chosen factor. Some organizations prefer to only allow dialing by department to prevent callers from dialing senior executives by name. If you select Enterprise, the entire company is open to dialing by name.

G The Time Schedule defines the business hours for the Auto Attendant. During non-business hours, callers hear the after-hours greeting and dialing menu. "EveryDayAllDay" means that no schedule for business hours is in effect. If you select None, the same greeting will be used at all times.

H On a scheduled holiday, callers hear the after-hours greeting and dialing menu. If you select None, the same greeting will be used at all times.

Note: Remember to Save Changes

Configuring Business Hours Menu Options

OFM Home > Auto Attendant > General Settings > Business Hours Menu Options

Use Business Hours Menu Options to select a greeting and configure the prompts to be used during business hours. You can use the default greetings or upload a new greeting using a .wav/MP3 greeting file format.
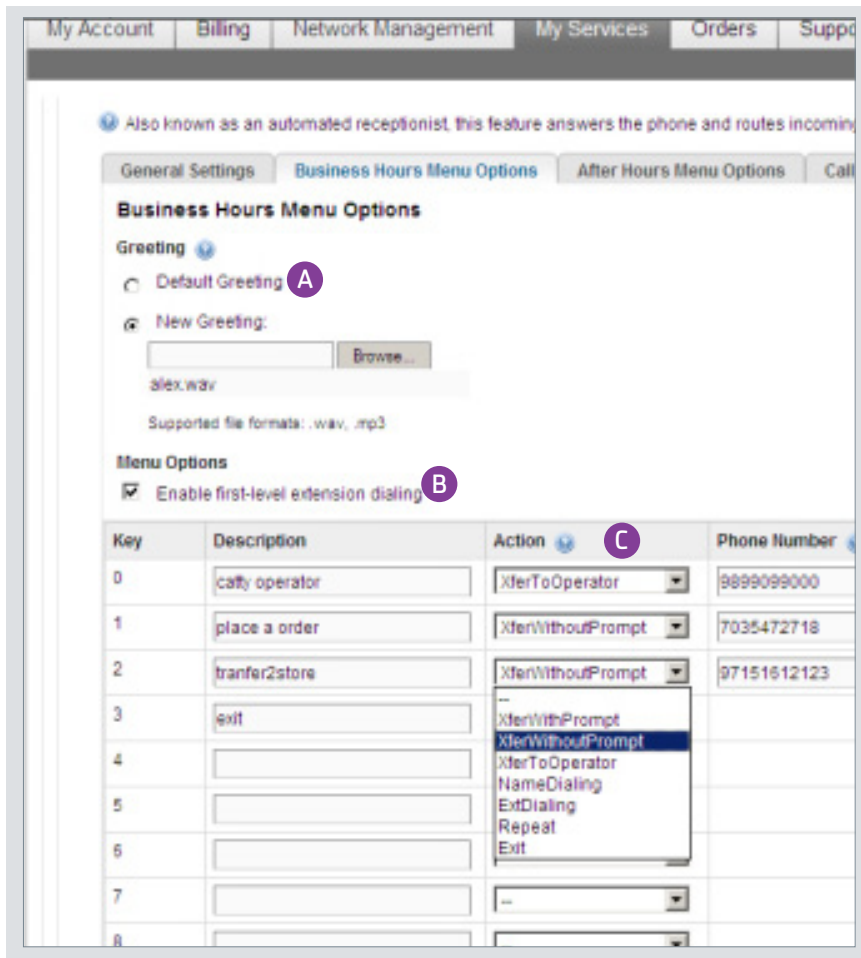

Figure 3: Configuring Business Hours Menu Options

A Select Greeting option. Select "Default Greeting" to play a generic system recording that does not identify your company by name.

Select "New Greeting" to play a custom recording. (A custom recording can include music on hold, personal greetings, comfort messages, advertising, and more.)

The maximum recording length is 5 minutes. See Recording or Uploading a Custom Greeting in this document for more details.

B After the first Welcome message, first-level extension dialing plays a prompt that allows a caller to dial an extension immediately.

C Use the action section to select the dialing options for the callers.

- Transfer with Prompt: transfers with prompt "Please wait while your call is transferred"
- Transfer without Prompt.
- Transfer to Operator: transfers with prompt "Please wait while your call is transferred to the operator".

Note: If you select a transfer option, a telephone number field displays. When an action transfers a call, a number must be specified.

The number may be a line or DID number. A"*" feature code or Voice VPN location code and extension number may be entered. This number can be an internal number or a mobile number.

If the action transfers the call to a location outside of the XO VoIP location, long distance charges may apply.

- Name Dialing: allows the caller to dial by name.
- Extension Dialing: allows the caller to dial by extension.
- Repeat: repeats caller's choices
- Exit: Ends the call after a prompt that says "Thank you for calling."

Scripts of Default Greetings

If the first level extension dialing is not permitted, these default greetings will be heard:

- » Default greeting without first-level extension dialing:
  - Welcome. Your call is being answered by an automated attendant.
  - If you know your party's extension, press 1.
  - To use our automated name directory, press 2.
  - If you would like to speak with an operator, press 0.
  - Thank you for calling.

- » Default greeting with first-level extension dialing:
  - Welcome. Your call is being answered by an automated attendant.
  - If you know the extension of the party you are trying to reach, dial it now.
  - To use our automated name directory, press 2.
  - If you would like to speak with an operator, press 0.
  - Thank you for calling.

- » Default After Hours greeting:
  - 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.

Important Tips

- Auto Attendant does not have its own voice mail box(es), but it can route calls to a line that is set to forward automatically to the voice mail box on that line (There are no voice mail boxes on XO DIDs)
- In case of an outage, Auto Attendant will still work but the caller will hear a treatment message "the person you are trying to reach is not available…" on the destination line
- If the call is transferred using the Auto Attendant, your user will see the Auto Attendant Caller ID Name and Number
- Auto Attendant can be the company's main number or an additional number. If the Auto-Attendant is set to always answer the main number, the main number becomes the auto-attendant's virtual number. Otherwise, an additional number must be used and the incoming calls must be forwarded to the auto-attendant as needed.

Recording or uploading a custom greeting

To Record a Greeting using Voice Portal:

1. Dial your Voice Portal number from any phone.

2. You will hear: "Are you making changes from a phone with XO VoIP Services service?"

- If yes, press * and go to step 3
- If no, go to step 3

3. Enter your Voice Portal extension (last four digits of phone number)

4. Enter your passcode (default is Voice Portal extension), followed by the # key
Note: For multi-level Auto Attendants, enter Attendant extension
(last four digits of phone number), then press the # key.

5. Select from the following options to load a greeting:

If you want to…	Press…	And if you want to…	Then press…
Load a Business Hours greeting	1	Record New Greeting	1
Load an After Hours greeting	2	Listen to New Greeting	2
		Revert to Default Greeting	3
		Return to previous menu	*
		Repeat menu	#

To Upload a Greeting Using Your Computer

- To use this feature, you must have an audio conversion program, plus a .wav/MP3 file to upload. To convert and load an existing audio.wav/MP3 file, refer to your computer's operating system instructions.
- If you are using a different sound recording product, note that the required format for recordings is: CCITT u_Law or A-Law, 8000 kHz, 8 bit Mono, .WAV file type.
- Click Browse to select a file on your computer.

Example Scenario: Configuring an Auto Attendant for a car dealership

Configure Main Auto Attendant first: In this example, lets say that XO Care gives you an Auto Attendant number of 240-243-4264 as the main number. Configure business hours as follows:

- Key 1-Dial by extension
- Key 2-Transfer with prompt to 240-555-1111 to Sales (virtual number for Sales department)
- Key 3-Transfer with prompt to 240-555-2222 to Service (virtual number for Service department)
- Key 4-Transfer with prompt to 240-555-3333 to Admin (transfer without prompt to Admin Auto-Attendant)
- Key 5- Name Dialing
- Key 0-Transfer to operator

» Use Voice Portal to record the Auto Attendant message, or upload the file using Online Feature Management

- In this scenario, the message might read: "Welcome….press 1 if you know the extension of the party you would like to reach, press 2 for the Sales department, press 3 for the Service Center, press 4 for the Administrative Department, press 5 to use our company directory, or dial 0 to be transferred to the operator."

» Configure the secondary menus:
» Example: Sales
- Key 1-Transfer to Car Sales (Transfer without Prompt to US Sales extension or number)
- Key 2-Transfer to Truck Sales (Transfer without Prompt to Main Auto Attendant menu)
- Key 9-Transfer to Main Menu (Transfer without Prompt to Main Auto Attendant menu)
- Key 0-Transfer to operator

» In this scenario, the message might read: "For Car Sales press 1, for Truck Sales press 2, to return to the previous menu press 9, or dial 0 to speak with the operator. Repeat for all other menus (Service and Admin)

Configuring After Hours Menu

OFM Home > Auto Attendant > General Settings > After Hours Menu Options

Use After Hours Menu Options to select a greeting and configure the prompts to be used after business hours. You can use the default greetings or upload a new greeting using a .wav/MP3 greeting file format.

Figure 4: Configuring After Business Hours Menu

A Select Greeting option. Select "Default Greeting" to play a generic system recording that does not identify your company by name.

Select "New Greeting" to play a custom recording. (A custom recording can include music on hold, personal greetings, comfort messages, advertising, and more.)

The maximum recording length is 5 minutes. See Recording or Uploading a Custom Greeting in this document for more details.

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If the action transfers the call to a location outside of the XO VoIP location, long distance charges may apply.

- Name Dialing: allows the caller to dial by name.
- Extension Dialing: allows the caller to dial by extension.
- Repeat: repeats caller's choices
- Exit: Ends the call after a prompt that says "Thank you for calling."

Selective Call Forwarding Tab

Use the Selective Call Forwarding tab to forward specific calls matching your pre-defined criteria to a different phone number. The criteria for each Call Forwarding Selective entry can be a list of up to 12 phone numbers or extensions and a specified time schedule. All criteria for an entry must be satisfied for the call to be forwarded (phone number and day of week and time of day). If the call is not forwarded, the call continues as if this service was not turned on.

A Turn selective call forwarding on or off

B Enter a telephone number. Check Play Ring Reminder when a call is forwarded, if you wish.

C Select Add Rule. Continue on next screen.

Figure 5: Setting up Call Forwarding Selective Business Rules-Screen 1

Selective Call Forwarding Tab (continued)

Figure 6: Setting up Call Forwarding Selective Business Rules-Screen 2

A Enter a description of the rule.

B Determine how you want the call forwarded.

C Select a time schedule to be used for the forwarded calls.

D Select a holiday schedule to be used for the forwarded calls.

E Select which phone numbers to receive the Call Forward treatment. If you prefer, you can enter up to 12 specified phone numbers.

Note: Click Continue when you're done.