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NHC Academy Training Module

Premium Auto Attendant Product training guide

What you'll learn today.

Agenda

What Does an Auto Attendant do?

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- Incoming Call

1
- Play Announcement

2
- Transfer to Phone

3
- Dial By Extension

4
- Dial By Name

An Auto Attendant allows callers to be automatically transferred to an extension without the intervention of an operator/receptionist). Many AAs will also offer a simple menu system (for sales, press 1, for service, press 2, etc.). An auto attendant may also allow a caller to reach a live operator by dialing a number, usually 0.

For example:

Thank You for calling Bob's Fish Mart We are open from 10 am to 9pm Monday through Friday.

To speak to Customer Service please press 1. For the Fish Department please press 2. For directions

please press 3. For our dial by name directory please press 4. If you know you party's extension.

*Please press # followed by the extension.*

Auto Attendant

Auto Attendant is intended for Business Group customers who want to provide an automated means of directing incoming calls to the appropriate person within the organization, typically to offload this task from a receptionist.

There are four main elements to the service.

- A hierarchy of menus that enable callers to choose from a list of options. These options direct the caller to the most appropriate department or person within the organization to handle that type of call, or to a number outside the Business Group if appropriate.

- A schedule of business hours and holidays that controls the presentation of menus, so that a different set of announcements and menus can be presented outside business hours and during defined special days.

- A cut-through call routing capability that enables a caller to dial direct to a person in the organization by dialing the appropriate extension number.

- A dial-by-name capability that enables a caller to dial direct to a person in the organization by entering the first few letters of the person's name.

Time of Day Call Routing

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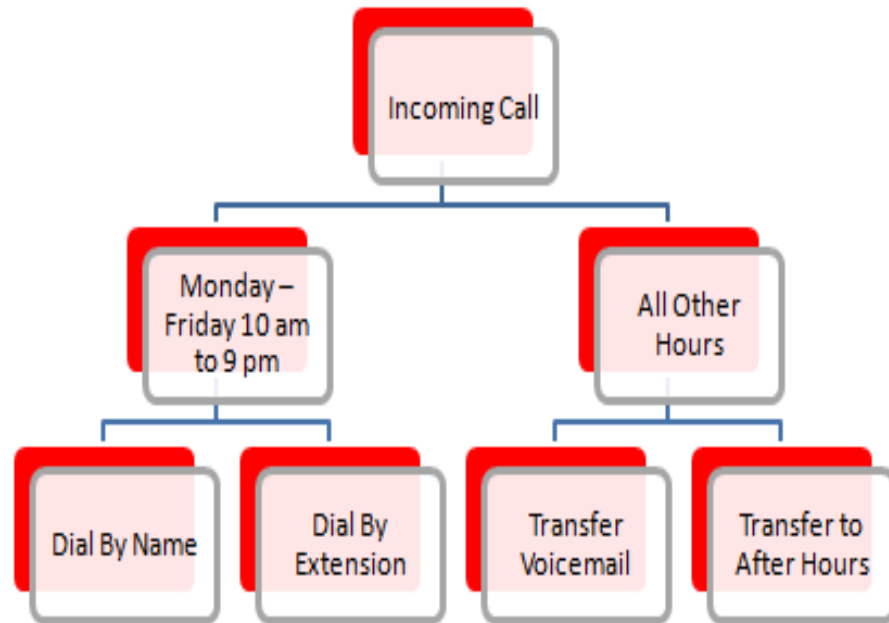
You can create different menus for different times of the day and week that play according to the pre-defined schedules that you have created. For example:

Welcome to Bob's Fish Mart. Unfortunately, we are currently closed. To hear directions to our store, press 1. To hear our operating hours, press 2. If you wish to leave a message, press 3, and we will get back to you as soon as possible.

Once you have set up your Premium Attendant with these schedules, menus, and recorded the necessary announcements, it will automatically play callers the correct menu depending on when they call.

Auto Attendant - Login

CommPortal Web

Please log in below.

Number: 5958675309

Password: ••••••••

☐ Remember me on this computer.

Login

If you have forgotten your password, please contact customer support.

Clients login into the Auto Attendant by following the steps below:

Point your browser toward the Comm-Portal located at https://commportal.nhcgrp.com.

Log in using the number assigned to the Premium Auto Attendant.

The first time you log in use the default Comm-Portal password.

You will be prompted to change your password within the *password parameters*.

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Line Status

- Introduction
- First time setup
- Schedule periods
- Menus
- Announcements
- Extensions
- Dial Extension at any time
- Advanced Settings
- Turning Premium Attendant on/off

Introduction

Premium Attendant is a self-managed automated attendant receptionist service allowing you to configure a flexible set of TUI menus for callers to your business. 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. For example:

Welcome to Bob's Tires. We are open for business right now. To hear directions to our store, press 1. To hear our opening hours, press 2. If you know the extension of the person you require, press 3, and then enter the extension followed by the pound key. If you know the name of the person you require, press 4 , and then enter their name followed by the pound key. Or, for any other enquiries please press 0.

You can create different menus for different times

Home

Line Status

Call Settings

Send Feedback

South Park Elementary AA ▾

Extensions   Advanced

edule and holidays, so that different menus can be day.

callers will be offered, and the actions they can

s your caller will hear.

ur caller can transfer to.

ettings that apply across all your menus.

Support

Help

Send Feedback

Change Call Services PIN

Change Voicemail PIN

At anytime the extensive Help topics are available for the user to assist them with first time issues.

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Main Screen

Home   South Park Elementary AA ▾

Line Status

| Main | Schedule | Menus | Announcements | Extensions | Advanced |

Activation Status

Your Premium Attendant is currently on.
Turn OFF

Service Status

Your current period is Work Day, and callers are being played your Main Menu menu.

✓

The configuration contains no errors.

Configure your weekly schedule and holidays, so that different menus can be played based on time and day.

Define the menus that your callers will be offered, and the actions they can choose from.

Record the announcements your caller will hear.

Manage the extensions your caller can transfer to.

Configure the advanced settings that apply across all your menus.
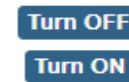
Turn OFF / Turn ON — Ability to turn on or turn off your auto Attendant.

Configure the Attendant schedule.

Configure the menus that you wish to offer your callers during the different schedule periods that you have just created.

Record the announcements that your callers hear for the menu options that require them.

If you chose to offer the option to use Dial by Extension, Dial by Name, Voicemail by Extension or Voicemail by Name, configure the extensions your callers' dial.

If you wish to change the default settings for the keys used in your menus or the way in which Premium Attendant handles caller error.

Configuring Schedules

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You can configure up to eight (8) Premium Attendant schedule periods.

For example, you might create:

One schedule for your normal business hours.

A second schedule to cover the lunch period.

An out of hours schedule for when your business is closed.

You create a separate menu for each of the schedules that you define.

Add a New Time Period

To start click on Example Schedule or Blank Schedule

1. Click on the **Add New Period** button.

2. Enter a description for the new period in the Name field.

3. Click on the **OK** button.

Define a Schedule

1. Click on the period you want to apply to the schedule.

2. Use your cursor to click and drag between the days and hours you wish to set the period for on the schedule grid.

3. When finished, click on the **Apply** button.

Created Schedules

If there are any errors in any of these schedules, an error icon appears alongside the schedule name. ⚠ Open 🚩

The **All-other times** schedule is used at the times that are not defined in any of your other schedules.

* This is represented as white spaces on the Calendar.

The **Special Days** schedule covers public holidays and other special one-off dates when your business is closed.

Schedules- Creating a Menu for a Period

1. Select the Period that you want to assign a menu for.

2. From the drop-down box, select Create New Menu

3. Enter a Name for the new menu

4. Click OK

*Repeat for each time period created within the schedule.

Schedule – Assigning Menu to Period

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1. After creating the menu, use the drop down box to select the Menu to be assigned to that period

2. Click Apply to save

*Repeat for each time period created within the schedule.

Menus

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Your Premium Attendant menu configuration determines what options are offered to the callers; and what announcements they hear.

Each schedule must have an associated opening menu before you turn your Premium Attendant on. You either choose an existing menu from the drop-down list or use the **Add New Menu** option to add a new one.

If you select **Add New Menu** you are prompted to enter a unique name and a description for the menu. You can only use this option if your Premium Attendant is turned off. You configure this menu and its announcements later in the set-up process.

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Menus - Announcements

First configure an announcement.

1. Select General from the upper tabs.

2. Go to Menu announcement and choose Create new announcement.

3. You will get a pop up Asking for a Name and description. Fill in Name and Description if desired.

4. Select you newly names announcement and click OK.

Menus - Keys

Use the Keys tab to assign actions to the keys that a caller can press to navigate the menu.

1. Click on the menu you want to assign Keys to.

2. Click on Keys.

3. Using the drop-down arrow, choose the option you want to assign from the list.

4. Click on the **Apply** button.

Menus – Time Out

Specify the action to be taken if a caller fails to press a key, to select a valid extension, or to select a valid name to transfer to within this time.

1. Click on the menu you want to assign the **Timeout** function to.

2. Click On the Timeout tab.

3. Using the drop-down menu, choose the time in seconds for the system to time out if no selection has been chosen.

4. Using the drop-down menu to choose the option you want to assign.

5. Click on the **Apply** button.

Menus – References

The References tab shows which menus and schedule periods refer to the menu currently selected on the left side.

Announcements

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The Announcements tab lists all the announcements that you have already created when setting up your menu configuration. Icons are displayed to indicate the status of each announcement.

This list can store up to 300 items, therefore, you can use the search box to find the announcement(s) you wish to edit.

Searches are performed by typing in all or part of either the name, description, or using the recording ID number.

Announcements - Icons

When you are viewing the announcements tab, different icons are displayed. This slide displays the icon and a description for that tab.

Play Button – Indicates that a recording exists for the announcement. Clicking the icon plays the announcement.

Record Button – Indicates that a recording does not exist for the announcement.

Information Icon – Indicates that the announcement is referenced by one or more menus.

Warning Icon – Indicates that the announcement is not reference by a menu.

Error Icon – Indicates that the announcement is referenced by a menu but does not have a recording.

Announcements – Adding New

1. Click on Add New Announcement button.

2. Type in a name for the announcement.

3. Type in a description for the announcement.

4. Using a microphone, click on the record button and record the announcement.

5. Finally, click on the **Add** button.

*Alternatively, you can click on the Upload Announcement link and upload a pre-recorded recording.

*Users also have the option to click on the Record by Phone link to use a phone to record the announcement.

Extensions

If you have chosen to offer your callers the following:

Dial by Extension,

Dial by Name,

Voicemail by Extension or

Voicemail by Name option

Then you can configure the set of extensions they can dial with the following two ways:

* Business Group Extensions (extensions built by NHC will automatically be added.)

Additional Extensions create an extension that rings callers outside of your BG.

Spoken Name

Lines using the voicemail spoken name have a green **override** link displayed. This link allows you to record a Business Group name recording for the line to be used in preference to the voicemail name recording.

Lines with no name recorded have a red **record** link displayed which allows you to record a Business Group name recording for that line.

Lines with a Business Group spoken name recorded have a green **listen/change** link displayed, allowing you to listen to your current recording and delete it or replace it with a new recording.

Business Group Extensions - Additional

To use additional extensions, you must define the set of extensions that callers can dial.

1. Click Add Extension to insert an additional extension.

2. Populate the fields in the new window that appears.

3. Click Add

For each extension you must specify the extension number (such as 5555), the extension's name, and the phone number that your caller should be transferred to if they dial this extension.

Advanced – Default Keys

The Advanced tab allows you to configure the following settings for your Premium Attendant that apply whenever you select a default value.

Do Nothing - if a caller presses a key that has this value, they will be told that the option is not recognized.

Transfer to Phone

Transfer to Voicemail

Transfer to Operator

Intercept Mailbox

Dial by Extension

Return to Previous Menu

Replay Menu

Advanced – Error Handling

You can change the global settings that determine what happens when there is an error when your callers are using Premium Attendant.

Users can specify what happens for the following failures:

- Timeout
- Unknown Input
- Invalid Extension
- Call Transfer

Advanced – Other Settings

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The **Other Settings** tab allows you to set Dial by Name and set the number for the mailbox.

First and Last Names – When a caller dials the name of the extension or mailbox they wish to transfer to, match against configured extensions based on first and last name (default), or just first name or just last name.

Intercept Mailbox – The Intercept Mailbox action directs your callers to the voicemail account entered.

To turn your Premium Attendant on or off, navigate to the Main tab at the top of the **Premium Attendant** page.

Click on the button labeled Turn ON or Turn OFF in the Activation Status panel.

Forwarding When Auto Attendant Is Off

When your Premium Attendant is turned off, you can choose what options your callers have:

1. Click on the hyper link "this number is unreachable"

2. Select the option to play a message telling them that the number is unreachable

   OR

3. select the option to have the caller forwarded to an alternative number.

4. Click Apply to save changes

Thank you for learning with us today!

Have Questions? Visit nhcgrp.com/academy for more information.