



Auto-Attendant Admin Guide

Updated October 2025

Table of Contents

Contents

Admin Voice Portal	3
Log In	3
Auto-Attendant.....	5
Overview	5
Tools.....	6
Auto-Attendant Setup.....	8
Add an Auto-Attendant	8
Activate an Auto-Attendant.....	9
Assign a Phone Number.....	9
Auto-Attendant Routes.....	11
Menu.....	13
Failure Routing.....	14
Dial by Extention.....	16
Message Route	17
Hunt and Queue Routes	18
User	19
Forward to.....	19
Directory.....	20
Hang Up.....	21
Reference	21
Schedule.....	22

Admin Voice Portal

The Voice Portal is where you can control who can contact you, how they will reach you, and when they can reach you. Many features can also be managed by dialing star codes.

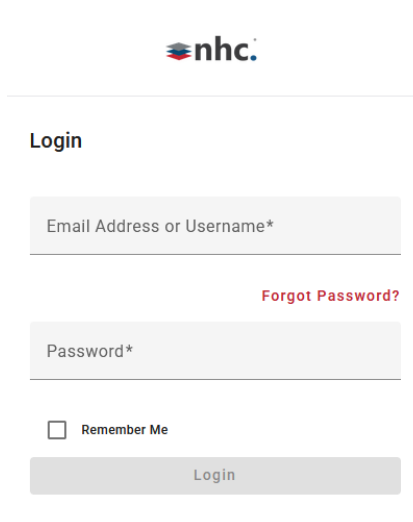
As an Account Manager or Admin user, you have access to manage not only your own services but those of other users on the account. You may also have access to manage Auto-Attendants and Phone Numbers (E911 addresses). If you don't see those sections in the menu, please contact your service provider for assistance.

Log In

When your account was created, an email was sent to you containing your username, a link to create your password, and the portal URL. Keep that email safe so you can refer to it later. If you haven't received it, contact Customer Support at Customer Support at 855-600-4NHC to get your login information.

Go to <https://nhcgrp.user.alianza.com/login>.

1. Enter your username or email address and password.
2. Check *Remember Me* to save your username and password.
3. Click [Login].



Forgot Password

If you can't log in, click *Forgot Password?* and an email will be sent to you with a link to reset it. Your new password must be at least eight characters long and include at least one number and one special character (^ \$ * . [] { } () ? " ! @ # % & / \ , > < ' : ; | _ ~ ` = + -).

Auto-Attendant

Managing inbound calls is a crucial part of how an organization handles everyday business. Auto-attendants enable identification, segmentation, and routing of callers to the most appropriate agent within your team. It's a simple, effective, and completely customizable tool which will significantly reduce costs and increase efficiency within any company.

Auto-attendants are easy to build and modify. The editor lays out your routes into clear columns and rows so you can see exactly what you're building and how it all fits together. Changes are saved in real time, so you won't lose any edits—even if you close the window. Incomplete auto-attendants will also be saved so they can be edited and completed later.

Overview

In Business Cloud > Auto Attendant, you can see all the auto-attendants on the account, including the assigned phone number(s), last modified date, and status. You can build and keep as many auto-attendants as you need. Changes are saved in real time, so you can start building now and come back to finish it later.

If you don't see Auto-Attendant in the menu, please contact Customer Support.

Auto-Attendant + Add Auto-Attendant

Search Auto-Attendant

Groups and Queues can be edited while the Auto-Attendant is active. To add or edit other routes, do one of the following:

- Duplicate it and make changes to the copy
- Remove any assigned phone numbers and deactivate it to allow editing

Name	Assigned Phone Number	Modified Date	Status
Emergency Support	1 (435) 628-2138	12/13/2023, 3:30:44 PM	Live
Main Line	---	12/13/2023, 3:38:26 PM	Incomplete
Main Office	1 (435) 628-3774	12/13/2023, 3:36:45 PM	Live
Sales	---	12/13/2023, 3:38:15 PM	Ready to Activate

1-4 of 4

Auto-Attendant

The following information is for Admin users only.

Managing inbound calls is a crucial part of how an organization handles everyday business. Auto-attendants enable identification, segmentation, and routing of callers to the most appropriate agent within your team. It's a simple, effective, and completely customizable tool which will significantly reduce costs and increase efficiency within any company.

Auto-attendants are easy to build and modify. The editor lays out your routes into clear columns and rows so you can see exactly what you're building and how it all fits together. Changes are saved in real time, so you won't lose any edits — even if you close the window. Incomplete auto-attendants will also be saved so they can be edited and completed later.

Manage Auto-Attendants

In Business Cloud > Auto Attendant, you can see all the auto-attendants on the account, including the assigned phone number(s), extension, last modified date, and status. You can build and keep as many auto-attendants as needed.

While auto-attendants that are live and processing calls cannot be modified, you can open the editor to see how it's been set up (view-only) or duplicate the auto-attendant to modify the route, then activate the new one when you're ready. See [Edit Auto-Attendants](#) for details.

Auto-Attendant

+ Add Auto-Attendant

Search Auto-Attendant

Groups and Queues can be edited while the Auto-Attendant is active. To add or edit other routes, do one of the following:

- Duplicate it and make changes to the copy
- Remove any assigned phone numbers and deactivate it to allow editing

Name	Assigned Phone Number	Extension	Modified Date	Status	
Emergency Support	1 (801) 867-8487	None	12/13/2023, 3:30:44 PM	Live	
London Office	---	301	3/21/2025, 12:25:44 PM	Incomplete	
Main Office	1 (801) 867-8602	101	3/21/2025, 12:25:26 PM	Live	
Sales	---	None	12/14/2023, 1:12:05 PM	Incomplete	
Sales Team	---	None	3/7/2025, 11:57:10 AM	Incomplete	

Items per page

10

1 - 5 of 5

Field	Description
[+ Add Auto-Attendant]	Start creating a new auto-attendant. The builder will open in a new window, so you can look back at the auto-attendant list if you need to reference it. See Auto-Attendant Setup for details.
Name	The name of the auto-attendant. If a name wasn't saved, it will be named "untitled auto-attendant" by default.
Assigned Phone Number	The phone number(s) directed to this auto-attendant. A phone number must be assigned before calls can be directed through the auto- attendant. If this is blank, contact Customer Support for assistance.
Extension	The unique extension (optional) assigned to the auto-attendant, which allows users to transfer calls back to the main menu to reach a different department. Click this field to add or modify the extension.
Modified Date	The last date the auto-attendant was modified: month, day, year, time.

Field	Description
Status	• Incomplete: There are open routes that need to be closed before the auto-attendant can be launched. • Ready to Activate: All routes are closed and it's ready to be launched (activated). • Activated: The route has been launched and it can now be assigned to a phone number. • Live: A phone number is assigned, the auto-attendant is receiving calls.
Tools	The tools available are different for each status. For example, an incomplete auto-attendant cannot be launched, and a live auto- attendant cannot be deleted. •  Duplicate. Active auto-attendants cannot be edited, but you can duplicate it and make changes to the copy. The duplicate feature makes it easy to create a new auto-attendant based on an existing one. Extensions cannot be duplicated. The extension must be removed from the original before it can be assigned to the duplicate. See Edit Auto-Attendants for details. •  Deactivate. Deactivate the auto-attendant and downgrade the status to <i>Ready to Activate</i>. To deactivate a <i>Live</i> auto-attendant, unassign the phone number first; the status will be downgraded to <i>Activated, Assign TN</i>. •  Activate. When the status is <i>Ready to Activate</i>, click the <i>Activate</i> icon to make the auto-attendant available as a destination in the Phone Number menu. Then go to Phone Numbers > Edit to assign a number to this auto-attendant. •  Edit. Open the editor to make changes to an inactive auto-attendant in <i>Incomplete</i> or <i>Ready to Activate</i> status. <i>Activated</i> and <i>Live</i> auto-attendants are view only. •  Delete. Permanently delete this auto-attendant. This cannot be undone. Before deleting an auto-attendant, contact Customer Support to redirect the phone number, so calls aren't sent to an attendant that no longer exists.

Auto-Attendant Setup Guide

Building Basics

- **Build.** As routes are added to the builder, they are arranged in neat rows and columns so you can see how it all fits together. They can be easily found, moved around, and connected as the auto-attendant is built.
- **Save.** When you're done configuring a route, click [Save], and it will be added to the Auto- Attendant builder canvas. Each route that has an  **Add** icon after it requires an additional route.
- **Edit.** To edit a route, click on the primary card to open the editor for that route on the right side of your window.



Tip

For best results, open the Auto-Attendant builder in Chrome or Firefox.

1. Add an Auto-Attendant

1. Click **[+ Add Auto-Attendant]**.
2. The auto-attendant builder opens in a new window. If your browser doesn't allow pop-ups, it may ask if you want to allow this one.
3. Enter a name for this auto-attendant.
4. Click the  **Add** icon to select and add a new route (see the [Routes Guide](#) for details). When a route is selected, the editor will slide out on the right of your window.
5. Configure the route as needed, then click **Save**.
6. Back on the auto-attendant builder, there is now a  **Add** icon next to each new route. Click the icon to add the next route.

The auto-attendant saves automatically. When you're done, go back to the Auto-Attendant tab and refresh the screen to see it.



Editing an Auto-Attendant

While an auto-attendant is live and processing calls, you can open the builder to see how it's set up, but nearly all routes are view-only to avoid disconnecting calls or otherwise breaking it. The only exceptions to this rule are [Hunt Group](#) and [Queue routes](#), which can be swapped while the auto-attendant is live. See [Edit an Auto-Attendant](#) for details.

1. Activate an Auto-Attendant

When the auto-attendant is complete, meaning there aren't any open routes and everything is good to go, its status will be updated to *Ready to Activate*. At this point, you click  to **Activate** it.

The auto-attendant won't be live until a phone number is assigned.

Name ↑	Assigned Phone Number	Extension	Modified Date	Status	
London Office	---	None	12/11/2024, 9:45:1...	Incomplete	
Main Office	Assign Phone Number	1000	12/11/2024, 9:44:5...	Activated, As...	
Sales	---	None	12/11/2024, 9:46:5...	Ready to Act...	   
Vancouver Office	1 (385) 323-5832	5832	12/11/2024, 9:49:2...	Live	

1-4 of 4 < >

2. Assign an Extension (Optional)

Assign an extension to an auto-attendant, so users can transfer callers back to the main menu to reach a different department.

1. For the auto-attendant you want to modify, click the extension field (None or an extension) to open the editor.
2. Enter a unique extension in the field.
3. Click **[Save]**.

Name

Main Office

Extension

1000

Assigned Phone Number

Modified Date

12/11/2024, 9:44:57 AM

Status

Activated, Assign TN

Cancel Save

3. Assign Phone Number

Once the auto-attendant is activated, a phone number needs to be assigned to it so calls to that number can be directed through the auto-attendant.

If the auto-attendant is activated but you do not see the *Assign Phone Number* link or have access to the Phone Numbers page, please contact Customer Support for assistance.

1. Click *Assign Phone Number* to go to the Phone Numbers page.

Name ↑	Assigned Phone Number	Extension	Modified Date	Status	
London Office	- - -	None	12/11/2024, 9:45:1...	Incomplete	
Main Office	Assign Phone Number	1000	12/11/2024, 9:44:5...	Activated, As...	   
Sales	- - -	None	12/11/2024, 9:46:5...	Ready to Act...	
Vancouver Office	1 (385) 323-5832	5832	12/11/2024, 9:49:2...	Live	

1-4 of 4 < >

- Locate the phone number this Auto-Attendant is for and click the  **map** icon on the right.
- Update the *Phone Number Rings To:* field to the active Auto-Attendant and click **[Save]**. If the auto-attendant you're looking for isn't listed, make sure it has been activated.

Phone Number Destinations

Phone number rings to

Vancouver Office - Auto Attendant ▼

Priority ring

Standard Ring ▼

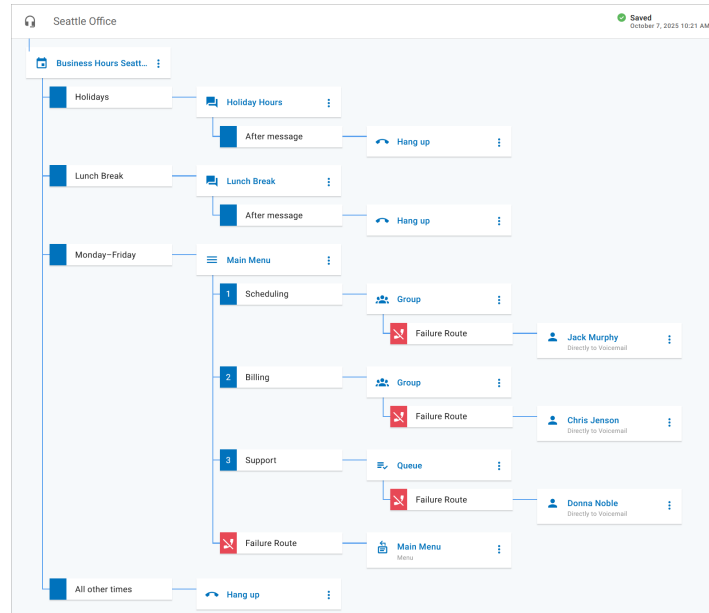
Cancel Save

The auto-attendant's status is updated to **LIVE**, and it is now active on the phone number.

Routes Guide

Routes are the key components of an auto-attendant and play an important role in the caller's experience. When used correctly, they can guide the caller to their destination and provide alternative options if the destination is not available. Review each route below to learn more.

- [Schedule Route](#)
- [Menu Route](#)
- [Message Route](#)
- [Group Route](#)
- [User Route](#)
- [Forward to Phone Number Route](#)
- [Directory Route](#)
- [Hang Up Route](#)
- [Reference Route](#)



Schedule Route

The **Schedule** route allows users to set their phone system to direct incoming calls to different destinations depending on when they call in, such as business hours, lunch hours, holidays, after-hours, etc. The Schedule route can be added at the beginning of the call flow or following a Schedule, Menu, or Failover route.

Schedules are configured separately in the [Auto-Attendant > Schedules](#) tab and are assigned to auto-attendants as needed. One schedule can be assigned to multiple auto-attendants or multiple schedules can be configured in a single auto-attendant.

1. In the auto-attendant builder, click **Add** and select the **Schedule** route.
2. Select a schedule from the list, then click **[Save]**.

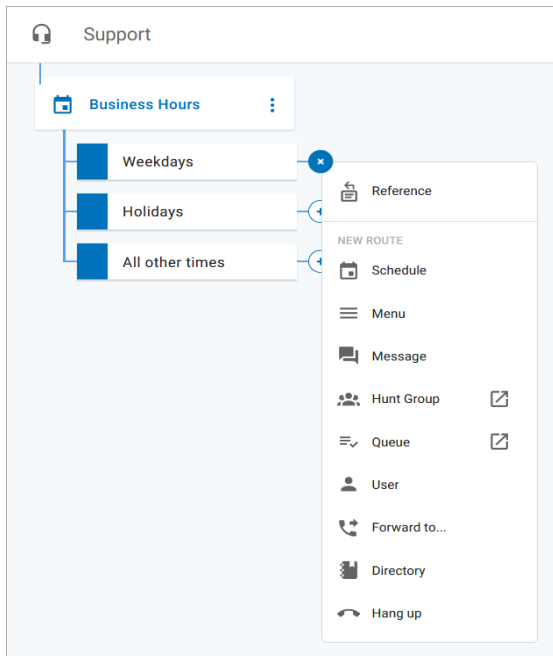
Schedule

Choose Schedule
Business Hours Seattle

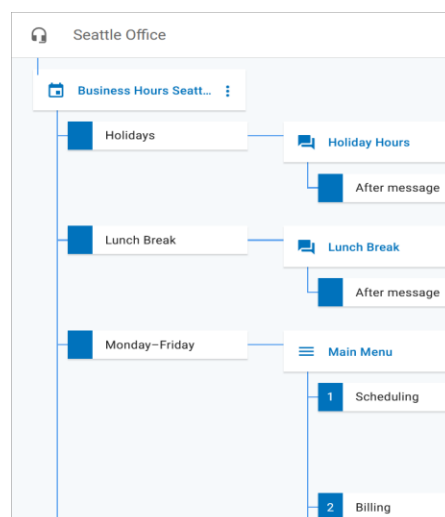
Cancel
Save

The schedule and each of its rules are added to the auto-attendant. By default, an *All other times* rule is also added to identify where calls are routed during times that are set to *Unavailable all day* or are not specified by a rule.

- For each rule, click  **Add** and select the next route to continue the call path.



The following example shows a completed auto-attendant that begins with a Schedule route.



Change Schedule

To avoid breaking the call flow, the schedule assigned to a route can be changed only if the routes assigned to each rule are removed first. You can, however, modify existing rules in the schedule. See [Schedules](#) for details.

Menu Route

A **Menu** route directs the caller to a message and DTMF touchtone options for call routing based on the key dialed.

Menu Name

First, enter a name for the menu, then continue to upload your prompts.

Menu

Menu Name

Prompts

Prompts are the recorded audio files that callers hear upon entering the menu.

- The **Intro Prompt** plays right before the Menu prompt. Because it's a separate audio file, it can be easily switched out for various circumstances, such as announcing seasonal sales or temporary business hours. This prompt is optional.
- The **Menu Prompt** tells callers how to navigate the menu options. For example: *"Thank you for calling Acme Corp. Press 1 for Sales, 2 for Support, or 3 for Billing."* This prompt is required.

For each prompt, click the menu and select a media file from the library.

- To confirm you have the right one, you can  play the file in your browser or  download it to your computer.
- If the file you need isn't listed, you can upload or record a new one in [Media Files](#).

Prompts







Allow Barge-in ☐

Allow Extension Dialing ☐

Allow Barge-In

Toggle on to allow callers to interrupt the Intro prompt by dialing an option (DTMF input) before they hear it.

Allow Extension Dialing

Toggle on to allow callers to dial their party's extension while the menu options are still playing. After dialing, there is a two second delay before the call is routed.

If "Allow Barge-in" is also enabled, callers can interrupt the Intro prompt as well. Because an extension may start with the same number as a menu option, there is a two second delay after a number is dialed before the call is transferred. If the dialed extension is invalid, the caller will hear “invalid extension,” and the call will end.

Menu Options

Add DTMF (touchtone) options (0–9, *, #). Each option will need a name and a completed route.

- 1. Click **[+ Add Option]**.
- 2. Select the DTMF option (0–9, *, or #).
- 3. Enter a **name** for the menu option.
- 4. **Repeat** steps 1–3 for other menu options.

Menu Options

1

Sales

2
ABC

Support

3
DEF

Billing

+ Add Option

Failure Routing

Failure Routing

Menu Timeout (Seconds)

Number of Seconds (1-999)

Timeout value is required.

Max Invalid Selections

5

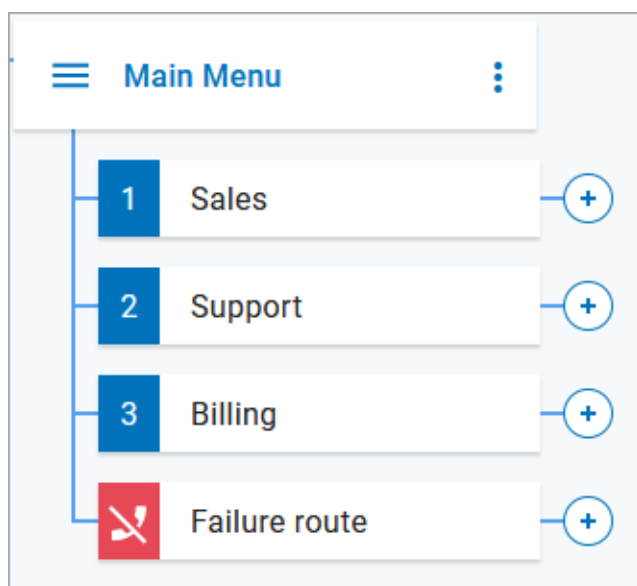
Invalid Prompt (Optional)

+ Choose File

Field	Description
-------	-------------

Menu Timeout	Set the delay time (1–999 seconds) before the menu times out and an invalid selection is registered. If the timeout occurs, the call will loop back to the menu. Once the maximum number of invalid selections is reached, the call will be routed to the failure destination.
Max Invalid Selections	Enter the number of invalid selections or menu timeouts that will be allowed prior to directing the call into the failure route.
Invalid Prompt	Upload a .wav or .mp3 file under 5 MB that the caller will hear after dialing an invalid option (required). For example: <i>"The number you entered was invalid. Please try again."</i>

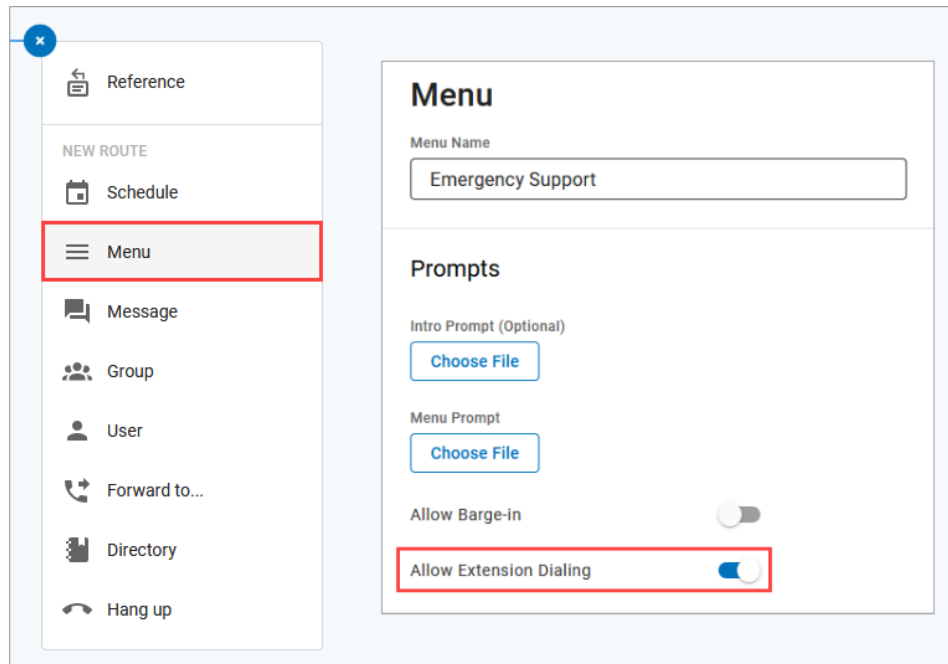
When you're done configuring the menu, click **[Save]**. The menu will be added to the auto-attendant builder canvas.



Dial By Extension

Dial by Extension, or Extension Dialing, allows a caller to interrupt an auto-attendant's Menu Prompt by dialing their party's extension, which means callers don't need to wait for the menu to stop playing before they can make a selection.

This feature can be enabled in the Menu route by toggling on "Allow Extension Dialing." Additionally, if "Allow Barge-In" is enabled, callers will also be able to interrupt the intro prompt.



Once an extension is dialed, the call will be directed to that extension and will follow the call handling rules for that user.

Because an extension can start with the same number as a menu option (for example, 2001), there is a 2-second delay after a number is dialed before the system will apply the selection. However, if the caller dials the maximum number of digits allowed for an extension on that account, the call will be sent immediately.

Invalid Selections

- If the caller dials an invalid extension, they will hear "invalid extension", then the call will be disconnected.
- If the caller dials more than one digit but less than an extension, they will hear the "Invalid Prompt" message and the menu will repeat.
- Once the caller reaches the "Max Invalid Selections" limit, the call will be disconnected.

Message Route

Using the **Message** route, the caller will hear a prerecorded message.

Enter a name or description for the message that will be displayed in the auto-attendant editor, then click the drop-down menu and select a media file from the library.

- To confirm you have the right one, you can  play the file in your browser or  download it to your computer.
- If the file you need isn't listed, you can upload or record a new one in [Media Files](#).

Message

Message Name

Message





Hunt Group & Queue Routes

Hunt Group and Queue routes distribute calls to a group of users based on predefined settings. Rather than following each user's call handling rules, calls follow the group's ring strategy to ensure calls are distributed properly. The first user to answer takes the call. If no one answers, the call follows the auto-attendant's failure route.

The type of call group you need depends on the needs of the users assigned to it:

- **Hunt Groups** distribute calls among a group of users based on a predefined call distribution strategy. If a call isn't answered, the system will "hunt" the next available agent with the same consideration. Supported features include Music On Hold, Night Forwarding, User Ring Strategy, and User Log In/Out.
- **Queues** are similar to Hunt Groups in supported features and call distribution methods but also allow for more complex management of high call volumes. When all users are busy, callers are placed in a queue where they listen to announcements or hold music until an agent is available. [Queue Announcements](#) can be added to provide a more engaging experience and help minimize missed or abandoned calls.

Hunt groups and queues are created and managed in [Call Groups](#) and can be assigned to one or more auto-attendants as needed. In the auto-attendant builder, add a **Hunt Group** or **Queue** route to the call flow, then select an existing group from the menu and click [Save].

Group

Hunt Group

- Escalations
- Scheduling
- Front Desk
- Road Crew

Queue

Queue

- Billing
- Customer Support
- Technical Support
- Escalations



Modify Group Settings

Because hunt groups and queues are managed in Call Groups and aren't built within the auto-attendant itself, the configurations can be modified at any time. This means you can change the queue announcements, update the Night Forwarding number, log users in or out, and change any other setting within the group as needed, without breaking the call flow for the auto-attendant(s) it's assigned to. See [Hunt Groups](#) and [Queues](#) for details.

Swap Hunt Group or Queue

As a rule, an auto-attendant cannot be edited while it is live and processing calls. However, there is an exception: the Hunt Group or Queue assigned to an auto-attendant route can be swapped in the editor at any time, so you can quickly update a call flow to route to a different team or department as needed. See [Hunt Groups](#) and [Queues](#) for details.

1. Go to the **Auto-Attendant** page.
2. Locate the auto-attendant you want to modify and click  **Edit** to open the builder.
3. Open the Hunt Group or Queue route you want to swap out.
4. Select a new group from the menu.
5. Click **[Save]**. The change is applied immediately.

User Route

The **User** route directs calls to a single user, whose personal call handling settings will then apply as normal (unless "Send calls directly to voicemail" is selected).

User

Send calls directly to user's voicemail ☒

Field	Description
User menu	Choose which user the incoming call will be directed to.
Send calls directly to user's voicemail	Toggle on to bypass the user's call handling rules and routes the call directly to the user's assigned voicemail box.

Forward to Phone Number Route

The **Forward to Phone Number** route directs calls to an on- or off-net phone number. Select the country code from the menu on the left, then enter the phone number and a description (optional) in the fields to the right.

Forward to Phone Number

Forward Number

Description

Directory Route

The **Directory** route allows the caller to dial a user in the directory using text to speech. When the caller reaches this point, they will hear, "Dial by last name" or "Dial by first name." The caller will dial 3 or more characters of the user's name and press #. If there is more than one matching user, the caller will select a user from a list of options.

Dial by...

Choose if callers will dial by the user's last name or first name.

Directory

Dial by...

☒ Last Name
☐ First Name

Custom Audio

Optionally, select custom audio prompts to give callers custom guidance in the directory. For **Intro Prompt** and/or **Invalid Selection**, click the drop-down menu and select a media file from the library.

- To confirm you have the right one, you can  play the file in your browser or  download it to your computer.
- If the file you need isn't listed, you can upload or record a new one in [Media Files](#). If custom

audio is not used, the caller will hear the default "Dial by" prompts.

Custom Audio

Intro Prompt (Optional)



Invalid Selection (Optional)



Failure Routing

A failure route is required in case the caller is unable reach the user they were looking for.

Failure Routing

Note: if the (*) key is pressed the caller will be guided through the Failure Route.

Timeout (Seconds)

Number of Seconds (5-30)

Timeout value is required.

Max Invalid Selections

Number of Invalid Selections (1-10)

Max invalid selections is required.

Field	Description
Timeout (Seconds)	Enter the number of seconds the call can be in the directory. (5– 30)
Max Invalid Selections	Enter the number of invalid selections the caller can try before the call is redirected to the failure route. (1–10)

Hang Up Route

The **Hang Up** route terminates any call that reaches this point. Remember to click **[Save]** to keep this route.

Hang up

Hang up will terminate any call that reaches this route.
Click "Save" to keep this route.

Reference Route

A **Reference** route redirects the call to another route. When a change is made in the original route, any references that use it will also be updated.

Choose which route a caller will be redirected to once they reach this point in the route, then click **[Save]**.

Reference

When the caller gets to this point, they will be redirected to the beginning of the referenced route.

Group

Sales Team

Menu

Main Menu

Message

Please leave a message

Schedule

Weekly Schedule

User

Chris Jenson

Donna Noble

Jack Murphy

Schedules

Business Cloud Communications > Auto-Attendant > Schedules

Schedules route incoming calls to different destinations based on the time and date the call comes in. Schedules can have one or more rules, each of which can have one or more date and time ranges to accommodate a wide range of use cases.

Once a schedule is assigned to an auto-attendant, the call flow is configured separately for each rule. For example, you can have a weekly rule for standard business hours that routes calls to individual departments, and a custom rule with dates and times for company holidays during which the business is closed for all or part of the day.

Schedules can be added to the beginning of an auto-attendant or following a Menu, Schedule, or Failure Route. One schedule can be assigned to multiple auto-attendants, and multiple schedules can be assigned to a single auto-attendant. See [Schedule Route](#) for details.

Manage Schedules

To view and manage schedules, go to Business Cloud Communications > Auto-Attendant and select the Schedules tab.

Schedules are listed by name, description, date and time it was created, and the number of times it's used in auto-attendants. To locate a particular schedule, sort the table by field headers or use the *Search schedules* field to filter the list by name or description.

Select an existing schedule to [modify it](#) or click [\[+ Add Schedule\]](#) to create a new one.

Auto-Attendant

Auto-Attendants
Schedules

+ Add Schedule

Name ↑	Description	Added	Usage Count	
Billing Hours Seattle	Mon-Thurs + Fri-Sat	5/12/2025, 1:16:43 PM	0	
Business Hours Seattle	Main + holidays	5/13/2025, 1:23:29 PM	2	

Items per page
10
1 - 2 of 2

Add Schedule

1. In the portal, go to Business Cloud Communications > Auto-Attendant.
2. Select the Schedules tab.
3. Click [+ Add Schedule] on the right.
4. Enter or modify the following as needed:
 - **Name:** Enter a name, such as *London Business Hours*, to identify the schedule. While multiple schedules can have the same name, a unique name will make it easier for users to differentiate in a list.
 - **Description:** Enter a description for the schedule (optional). The description is displayed on the Schedules page and included in the search results.
 - **Time zone:** Select which time zone will be applied to the rules.
5. **Rules.** Rules specify when calls in an auto-attendant will follow a particular path. There are two types of rules:
 - **Weekly** rules repeat on specific days and times throughout the week. See [Configure Weekly Rules](#) for details.
 - **Custom** rules are created for specific dates that occur once or repeat on a daily, weekly, monthly, or yearly basis. These are often exceptions to weekly rules, such as holidays in which you are closed for all or part of the day. See [Configure Custom Rules](#) for details.

Once the schedule is assigned to an auto-attendant, call routes are configured for each rule. A schedule can have multiple rules, and each rule can have multiple date and time ranges. For example, you may have a weekly rule for standard business hours that routes calls to individual departments, and a custom rule with dates and times for company holidays during which the business is closed.

Select a rule type, then configure one or more date and time ranges below. When you're done configuring a rule, click the ✓ checkmark in the bottom right to collapse it, then continue to add rules as needed.

6. When you're done, click [Create Schedule] to save it, then assign it to one or more auto-attendants and configure the call flows. See [Schedule Route](#) for details



Priority Order

When a schedule is assigned to an auto-attendant, calls are routed to the first rule that matches the time of the incoming call, based on the order in which the rules are defined in the schedule. This means rules for holidays and other non-standard hours **MUST BE FIRST** to ensure calls go through those checks first.

To change the order of your rules, click the  icon to the right of the rule and drag it to the correct position.



Best Practices

Because you cannot create additional rules to a schedule that's in use, it's best practice to always include a holiday rule to all of your schedules. If the holidays don't need to be active, set the custom date and time in the past.

Once a schedule is assigned to an auto-attendant, rules cannot be added, removed, or rearranged, since those changes would break the auto-attendant's call flow. However, you can modify individual *Date & Time* periods for each rule.

To give you the most flexibility in the future, we recommend *always* including a Holiday route in your schedules, so you can add dates and times as needed, to configure specific dates and times for which calls need to be routed to a specific location. If you anticipate ever needing to and maybe even an extra route, just in case you need to

In case you might need to route calls on a specific date/time to

we recommend creating an extra rule, just in case you need to use it later. Since you don't need it now, create it for a date in the past and then assign the route to a

Configure Weekly Rules

Weekly rules repeat on specific days and times throughout the week. Select which days the rule will apply, then specify the "on" time range(s) below. Hours not specified are considered "off" and will follow the *All other times* route in an auto-attendant. Add additional time ranges as needed.

Create separate rules to account for different times on different days. For example, if an office closes early every Friday, create one rule for Mondays–Thursdays and another rule for Fridays.

Rule name*

Monday - Thursday

Weekly

Custom

Sun

Mon

Tues

Wed

Thur

Fri

Sat

08:00 AM

05:00 PM

+ Add Time Range

✓

Rule name*

Friday

Weekly

Custom

Sun

Mon

Tues

Wed

Thur

Fri

Sat

08:00 AM

03:00 PM

+ Add Time Range

✓



Tip

Rules that occur every week can be configured as either Weekly or Custom:

- Select Weekly to choose which days of the week.
- Set Custom to set a recurrence pattern, such as every other day or every three weeks.

Configure Custom Rules

Custom rules are created for specific dates that occur once or repeat on a daily, weekly, monthly, or yearly basis. These are typically exceptions to weekly rules, such as holidays in which you are closed for all or part of the day.

To configure a custom rule, select the Custom tab and fill out the first *Date & Time* period:

- **Description:** Enter a description to identify the date.
- **Date:** Enter the date it will occur. If the rule will repeat (below), this is the start date.
- **Time Range:** Enter the start and end time. Add additional time ranges as needed. To specify the entire day, toggle on *Unavailable all day* below.
- **Unavailable all day.** When enabled, the entire date (12:00 a.m. to 11:59 p.m.) is considered off-hours, and calls will be routed to the *All other times* route configured in the auto- attendant. When disabled, a time range (above) is required.
- **Repeat.** When disabled, the event will occur once. Toggle on to configure the rule to repeat on a daily, weekly, monthly, or yearly basis. See [Recurring Schedules](#) for details.
- **Add Custom Date.** Click to add another date to the rule.
- **Add Holidays.** Add multiple US or Canadian holidays at once. See [Add Holidays](#) for details.

Rule Name*

Closed Holidays

Weekly

Custom

Date & Time

Description

Summer Party

Date*

6/21/2025

06:00 AM

02:00 PM

+ Add Time Range

☐ Unavailable all day

☐ Repeat

+ Add Custom Date

+ Add Holidays

Recurring Schedules

Custom rules can repeat on a daily, weekly, monthly, or yearly basis, starting on the date entered above. The recurrence pattern specifies how often the rule applies and for how long it will continue. The settings for each interval type vary.

1. **Type.** Select the interval type (Day, Week, Month, or Year).
2. **On.** Specify how often it will recur.
 - **Daily:** Repeat every X days.
Enter 1 for every day, 2 for every other day, etc.
 - **Weekly:** Repeat every X weeks.
Specify the number of weeks between each occurrence and the day(s) it will repeat.
 - **Monthly:** Repeat every X months.
Specify the number of months between each occurrence and on which day or week of the month it occurs. For example, Day 10 or Second Tuesday.
 - **Yearly:** Repeat every X years.
Specify the number of years between each occurrence and on which day or week of the month. For example, September 30 or Last Tuesday in September.
3. **Ends.** Choose when the recurrence pattern will end:
 - A specific date
 - A number of occurrences
 - Never

Daily

☒ Repeat

Daily Weekly Monthly Yearly

Every day

Occurs **every day** starting Saturday, July 12, 2025.

Ends

☐ Date

☐ After occurrences

☒ Never

Weekly

☒ Repeat

Daily **Weekly** Monthly Yearly

Every weeks

On

Sun Mon Tues Wed Thur Fri **Sat**

Occurs **every 2 weeks on Sunday and Saturday** starting Monday, July 28, 2025.

Ends

☒ Date

☐ After occurrences

☐ Never

Monthly

☒ Repeat

Daily Weekly **Monthly** Yearly

Every month

On

☒ Day 14

☐ Second Monday

Occurs **the 14 day of every month** starting Monday, July 14, 2025.

Ends

☐ Date

☒ After occurrences

☐ Never

Yearly

☒ Repeat

Daily Weekly Monthly **Yearly**

Every year

On

☒ July 24

☐ Fourth Thursday in July

Occurs **every year on the 24 day of July** starting Thursday, July 24, 2025.

Ends

☐ Date

☐ After occurrences

☒ Never

Add Holidays

Holidays are specific days and times during which the company is closed that are separate from normal business hours. Most company-wide holidays recur every year on the same fixed or variable date. Rather than entering each holiday individually, save time by adding either 10 US holidays or 14 Canadian holidays at once, including:

US Holidays

- New Year's Day
- Martin Luther King Jr. Day
- Presidents' Day
- Memorial Day
- Independence Day
- Labor Day
- Columbus Day
- Veterans Day
- Thanksgiving Day
- Christmas Day

Canadian Holidays

- New Year's Day
- Family Day
- St. Patrick's Day (NL)
- Good Friday
- Easter Monday
- Victoria Day
- Canada Day
- Civic Holiday
- Labour Day
- National Day for Truth and Reconciliation
- Thanksgiving Day
- Remembrance Day
- Christmas Day
- Boxing Day

1. At the bottom of a custom rule, click [+ Add Holidays], then select either **US Holidays** or Canadian Holidays.

The dates for each holiday are automatically generated for the current calendar year (even if those dates have already passed), default to *Unavailable all day*, and do not repeat.

New Year's Day

▼

Martin Luther King Jr. Day

▼

Presidents' Day

▼

Memorial Day

▼

Independence Day

▼

Labor Day

▼

Columbus Day

▼

Veterans Day

▼

Thanksgiving Day

▼

Christmas Day

▼

Date & Time

Description*

New Year's Day

Date*

01 / 01 / 2025

📅

☒ Unavailable all day

☐ Repeat

🗑 Remove Date & Time Range

2. Expand each holiday entry and customize the settings as needed. To collapse a holiday, click the ✓ checkmark in the bottom right.
 - **Date.** The date is generated for the current year only. If the organization observes the holiday on a different date, enter it here.
 - **Availability.** Each holiday defaults to *Unavailable all day*, which means calls will be routed to the *All other times* rule configured in the auto-attendant. To route calls to the flow configured for this rule during specific hours, toggle this off and enter the start and end times in the fields above.
 - **Repeat.** Holidays are one-time dates by default. If the holiday will be observed every year, toggle this on and configure the recurrence pattern below.
 - **Delete.** If a specific holiday isn't required, click [Remove Date & Time Range] or update it to a date you need.
3. To add custom holidays, scroll to the bottom of the rule and click [+ Add Custom Date], then configure it as needed.
4. After creating all necessary rules, arrange them in order of priority, ensuring that the Holiday rule appears first. Because incoming calls are routed based on the first rule that matches their time, placing the Holiday rule at the top ensures that holiday checks are performed before calls are routed according to standard business hours.

Schedule

Name*

Business Hours

Description

Time zone*

US/Mountain

Rules

Holidays

Must be first

Monday-Friday

Saturday

+ Add Rule

Cancel

Create Schedule

Review Holiday Dates Yearly

Whether you've set your holidays to repeat every year or not, remember to review the schedule at the beginning of every year to ensure the dates match the company calendar. While most national holidays recur yearly on the same date or day of the week, some holidays will change and your organization may observe different dates.

Modify Schedules

Schedules can be modified at any time, but there are limitations: Once a schedule is assigned to an auto-attendant, rules cannot be added, removed, or rearranged, since those changes would break the auto-attendant's call flow. However, you can modify the *Date & Time* periods for individual rules.

For example, if your schedule has a custom rule for holidays (or dates in which you are closed), and this year the company is closing early for a party, you can add a new *Date & Time* period to account for it. Or if the party was on June 16 last year, but it's planned for July 12 this year, you can update the date.

1. In the Schedules tab, select an existing schedule to modify.
2. Expand a rule and make any changes as needed. To collapse the rule again, click the ✓ checkmark in the bottom right.
3. When you're done, click [Update Schedule] to apply your changes.

Schedule

Name*

Seattle Office

Description

Open hours + holidays

Time zone*

US/Pacific

Rules

Open

Closed Holidays

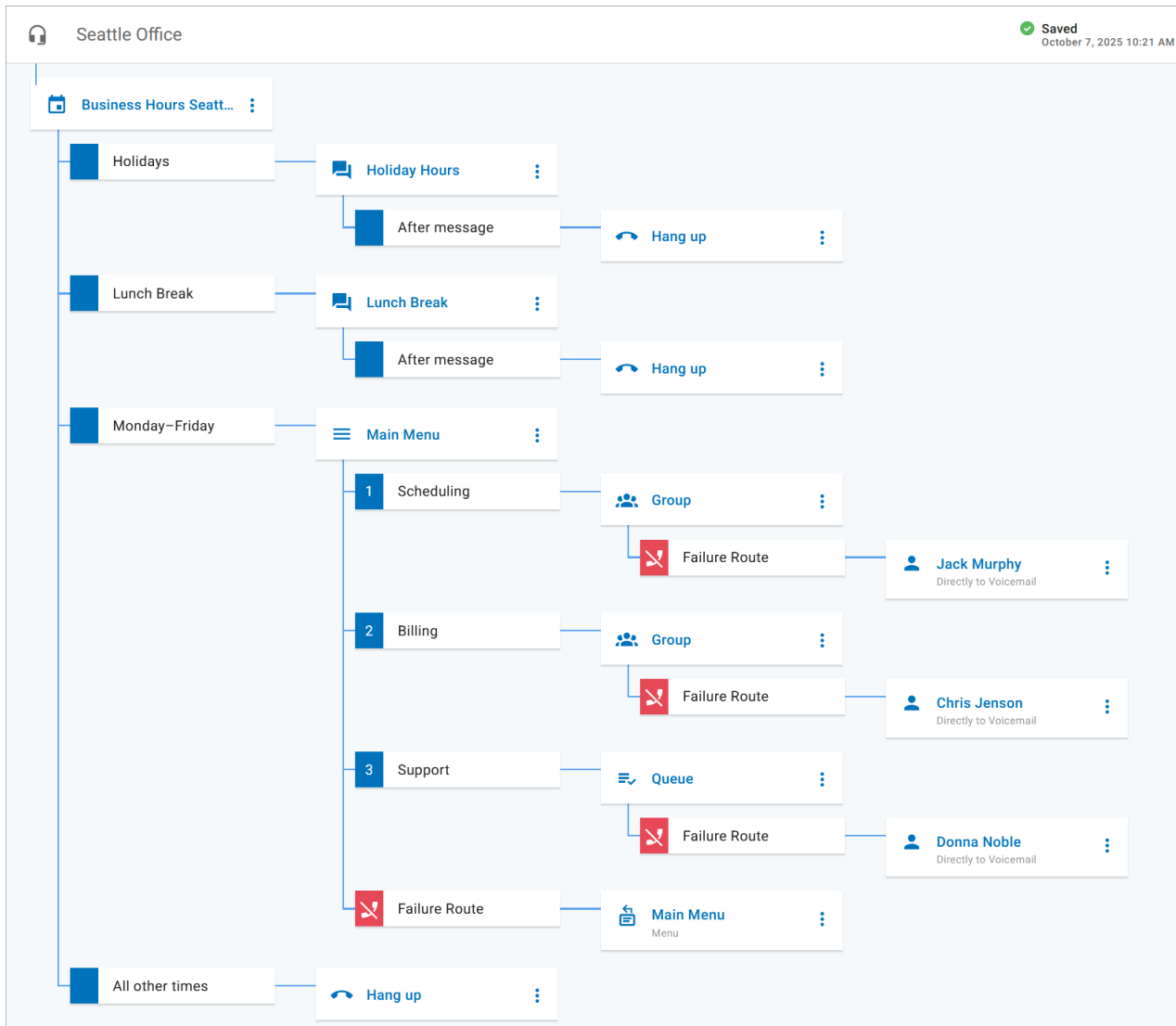
+ Add Rule

Cancel

Update Schedule

Assign Schedule to Auto-Attendant

Once a schedule is saved, assign it to one or more auto-attendants. In the auto-attendant builder, add a **Schedule** route, select the schedule you want to apply at that point in the call flow, then configure the call flow for each route. See [Schedule Route](#) for details.



Use Cases & Examples

Schedule 1: Doctor's Office

A doctor's office is open weekdays from 8:30 AM to 5:00 PM and every other Saturday from 10:00 AM to 2:00 PM. They're closed on all federal holidays and work half days every other Friday, New Years Eve, and Christmas Eve.

- **Schedule:** Main Hours
 - **Weekly Rule:** Weekdays
 - Monday–Friday from 8:30 AM to 5:00 PM
 - **Custom Rule:** Weekly
 - Every 2 weeks on Saturdays from 10:00 AM to 2:00 PM
 - **Custom Rule:** Holidays
 - US Holidays: *Unavailable all day*
 - New Years Eve: 8:00 AM to 2:00 PM
 - Day After Thanksgiving: *Unavailable all day*
 - Christmas Eve: 8:00 AM to 2:00 PM

Schedule 2: Middle School

A middle school's office hours vary depending on the time of year. A separate rule is created for the summer hours, since not all staff will be available.

- **Schedule:** Office Hours
 - **Custom Rule:** School Hours

Weekly, Monday - Friday from 7:30 AM to 3:30 PM. Starts August 1 and repeats every week until May 25.
 - **Custom Rule:** Summer Hours

Weekly, Monday–Friday 8:00 AM to 12:00 PM. Starts May 26 and repeats every week until July 31.
 - **Custom Rule:** Holidays
 - All school holidays: *Unavailable all day*

Edit Auto-Attendants

While an auto-attendant is live and processing calls, you can open the builder to see how it's set up, but nearly all routes are view-only to avoid disconnecting calls or otherwise breaking it. The only exceptions to this rule are [Hunt Group and Queue routes](#), which can be swapped while the auto-attendant is live.

Here's what you can do:

- [Change the call flow](#)
- [Change an extension](#)
- [Remap migrated Hunt Groups or Queues](#)



Note

If you don't have access to the Auto-Attendant or Phone Numbers pages, please contact Customer Support for assistance.

Change the Call Flow

If you need to make changes to the Schedule, Menu, Message, User, Forward to, Directory, Hang Up, or Reference routes, you have a few options:

Option 1: Duplicate, Edit, Switch

1. In the portal, go to the **Auto-Attendant** page. Locate the one you want to modify and click  Duplicate.
2. Click  **Edit** to open the builder and make any necessary changes.
3. Go back to the **Auto-Attendant** page, find the one you just modified, and click  **Activate**.
4. When you're ready for the new version to go live, go to the **Phone Numbers** page and locate the phone number assigned to the original auto-attendant. Click the destination on the right and change it to the new auto-attendant. Click [Save].
5. Extensions cannot be duplicated. If the auto-attendant had an extension, remove the extension from the original and assign it to the new one.
 - Click the extension field on the original auto-attendant. In the pop-up, delete the extension, then click [Save].
 - Click the extension field on the duplicated auto-attendant. In the pop-up window, enter the extension, then click [Save].
6. Go to the **Auto-Attendant** page, locate the original, and click  **Deactivate**.
7. Delete or rename the old version, so users don't confuse them.

Option 2: Deactivate, Edit, Reactivate

To avoid breaking an active call flow, make these changes after hours when you're sure calls aren't coming in for as long as it will take to make changes.

1. In the portal, go to the **Phone Numbers** page and locate the phone number assigned to the auto-attendant you want to modify.
2. Click the phone number destination on the right and change it to "None" or another viable option (like a temporary auto-attendant).
3. Go to the **Auto-Attendant** page and locate the one you want to modify. Click  **Deactivate**.
4. Now click  **Edit** to open the builder and make any necessary changes.
5. When you're done, go back to the **Auto-Attendant** page, locate the auto-attendant you just modified, and click  **Activate**.
6. Click the *Assign Phone Number* link to go to the **Phone Numbers** page.
7. Locate the phone number you want to assign, then click the destination on the right and change it back to the auto-attendant.
8. Click **[Save]**. Calls to that phone number will now be directed through the auto-attendant.

Change Extension

The extension assigned to an auto-attendant can be updated at any time:

1. Go to the Auto-Attendant page.
2. From the list of auto-attendants, locate the one you're looking for and click the *Extension* field.
3. Add, change, or remove the extension, then click **[Save]**.

Name

New Auto-Attendant

Extension

Assigned Phone Number

Modified Date

6/11/2024, 4:07:42 PM

Status

Incomplete

Cancel

Save

Remap Migrated Hunt Groups or Queues

In April 2025, hunt groups and queues were split out of the auto-attendant and rebuilt as standalone objects in Call Groups. At that time, groups in *Activated* or *Live* auto-attendants were automatically migrated to Call Groups to not disrupt the call flows. However, hunt groups and queues assigned to *Incomplete* and *Ready to Activate* auto-attendants could not be migrated.

Those groups must be rebuilt before they can be assigned to the auto-attendant.

1. First, go to [Call Groups](#) and create a new hunt group or queue.
2. Next, go to Auto-Attendant and select the one you want to modify to open the builder.
3. A yellow alert is displayed where a hunt group or queue configuration used to be. Click that box and select a hunt group or queue from the list.
4. Click **[Save]** to assign the call group to the route.

The screenshot shows the 'Incomplete Auto-Attendant' configuration interface. The main area displays a flowchart with three steps. Step 1 is labeled '1' and has a yellow alert box that says 'SELECT A HUNT GRO...' with 'Billing Team' below it. Step 2 is labeled '2' and has a yellow alert box that says 'SELECT A QUEUE' with 'Technical Support' below it. Both alert boxes have a 'Failure Route' and a 'Hang up' button. A third 'Failure Route' and 'Hang up' button are at the bottom. On the right, a 'Queue' dropdown menu is open, showing options: 'Queue', 'Billing', 'Customer Support', 'Technical Support', and 'Escalations'. At the bottom right are 'Cancel' and 'Save' buttons.



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