
Voice Mail Conversion Project Auto Attendant Training



Agenda

- Auto Attendant Overview
 - Overview
 - Actions required
 - Directory
 - Business Hours & Holidays
 - Greetings
 - Submenus
- Building & Updating your AA on the web
 - Create Directory
 - Create Schedules
 - Create Greetings/Menus
 - Recording your menus and announcements
- AA TUI Map
- Questions

AUTO ATTENDANT OVERVIEW

Auto Attendant - Key Points

- All current Call Processors have already been built and programmed for you in the new system – ready for recording.
- The caller's experience will remain the same, but how the AA is programmed will change for the better
 - Current system is TUI programming interface only
 - New system has both web and TUI programming interfaces
- Calls can be routed to phone lines, other mailboxes, other AAs, information announcements.
- Callers can dial the extension number of the person they are trying to reach or they can dial-by-name to reach their party.
- In the new system, a Directory is required for each AA to allow callers to dial-by-extension or dial-by-name.
- Throughout the new application, phone numbers should be entered based on your Centrex dialing plan.

Auto Attendant - Actions Required

- Become familiar with the new terminology for the Auto Attendant
- Learn about the web interface that will allow you to program, record and manage your AA
- Become familiar with the new TUI as an alternate means to manage your AA.
- After training:
 - Go to: <http://fvms.fairpoint.com/>
 - Log into your AA using your 10-digit AA number and password.
 - Confirm the programming
 - Complete your recordings
 - Validate or create your Directory

Terminology Changes for the Auto Attendant

| <u>Unisys Terminology</u> | <u>uReach Terminology</u> |
|---------------------------|-------------------------------------|
| Call Processor | Auto Attendant |
| Node | Ext or Extension |
| Sub-Node (link) | Sub-menu(extension) |
| Level 1 (nodes 000+001) | Greetings (see below) |
| Level 2-4 (nodes 100-999) | Sub-menus |
| Day Mode | In-Hours Greeting |
| Night Mode | Out-of-Hours Greeting |
| Holiday Mode | Holiday Greeting |
| Phone Transfer | Dial Number |
| Mailbox Transfer | Go to Account |
| Dial the telephone number | Dial by Extension (needs Directory) |
| Attendant transfer | Extension 0 (zero) |
| Hanging Link | Announce/Announcement |

Directory

- A Directory is required if you plan to offer the Dial-by-Name and/or Dial-by-Number (Dial-by-Extension) options to your callers
- Enter employee Name, extension number, and destination number
 - Extension number is the number callers enter to reach their party
 - Destination number is the number the system dials to complete the transfer
 - Destination number may also be a transfer to a mailbox
- The first digit of the extension number will be a key press on the main menu or on a submenu.
 - If all phone extensions begin with the same digit, you might place that option directly on the main menu.
 - Example: All lines begin with the digit 6. Callers will press digits that match the phone line of their choice, like 6788. In the Directory, Extension number is 6788 (4 digits) and Destination number is 6788.
 - If phone extensions begin with several different digits, you may need to create a submenu just for extension transfers.
 - Example, use key press 1 from the main menu to route callers to a line of their choice, like 6789. Callers will press 1 6 7 8 9. In the Directory, Extension number is 16789 (5 digits) and Destination number is 6789.

Business Hours & Holidays

- The system offers three schedules:
 - In Hours - default
 - Out of Hours
 - Holidays
- Default “Business Hours” for the system is “open all day” 7 days per week, but this can be easily changed through web-based access.
- Each day of the week can have a different schedule with open and close times in 15-minute increments or every day can be the same.
- You can select and schedule up to 16 holidays in advance
 - No need to change holidays that occur on the same day each year
 - Easy updates through web-based access
 - If holidays are identified, a greeting must be recorded.
- When open/closed hours are specified, both In-Hours and Out-of-Hours greetings must be recorded.

Greetings

FairPoint's Auto Attendant offers four greeting options: In Hours, Out of Hours, Holiday, and Emergency Override.

- In Hours Greeting – Plays during business hours and is the default greeting if no business hours are created
- Out of Hours Greeting – Plays outside of scheduled business hours.
- Holiday Greeting – Plays on scheduled holidays and is easy to record for each holiday via web-based access.
- Emergency Override – Can only be activated over the phone. Is played instead of the scheduled greeting until it is turned off.
- Caution: If business hours are scheduled, and an Out of Hours greeting is not recorded, a generic system greeting will play outside of “open” business hours.

Submenus

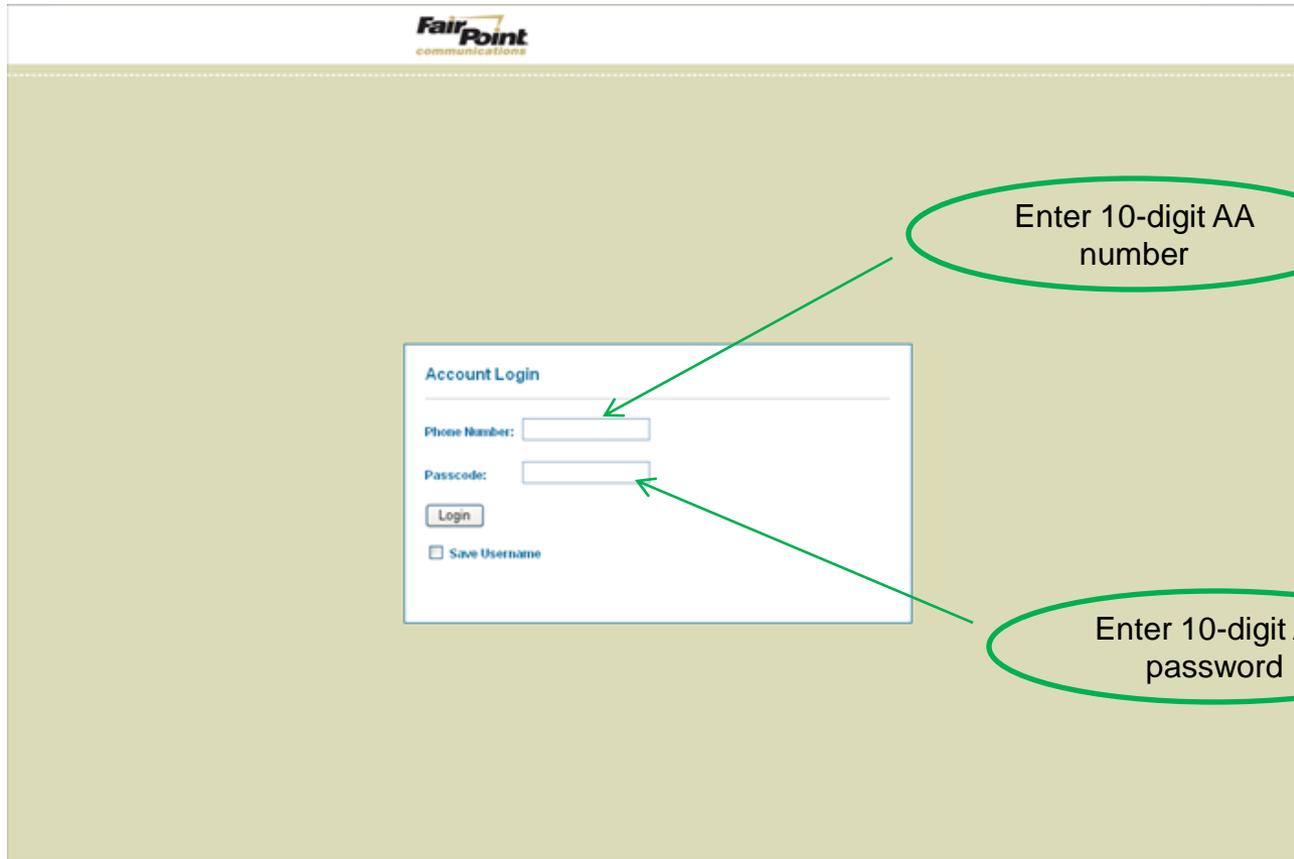
- There are 7 submenus available, in addition to the in hours greeting menu, out of hours greeting menu, and holiday greeting menu
- These 7 submenus can be shared with different menus and submenus, if the same options are needed at different points in the call routing.
- Submenus can be linked from any greeting menu or from other submenus.
- Each submenu can include up to 9 key press options/exts (keys 1 to 9) which can be routed using any of the Call Routing Options previously described.
- The 0 key press is reserved for “operator” functions with Call Routing Options limited to “dial #” and “go to account”.



BUILDING & UPDATING YOUR AA ON THE WEB

Accessing your AA on the web

<http://fvms.fairpoint.com/>



The screenshot shows the FairPoint Account Login page. The page has a light green background and the FairPoint logo at the top. The login form is titled "Account Login" and contains the following fields and elements:

- Phone Number:
- Passcode:
- Login button
- Save Username

Two green callouts with arrows point to the input fields:

- The top callout, "Enter 10-digit AA number", points to the Phone Number field.
- The bottom callout, "Enter 10-digit AA password", points to the Passcode field.

Home page of Demonstration AA

FairPoint Auto Attendant - Microsoft Internet Explorer provided by FairPoint Communications

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail

Address <http://www2.fvms.fairpoint.com/0374000T0b/cgi-bin/vsroom> Go Links

FairPoint communications Auto Attendant Setup Account

Training State of Vermont 802-555-1250 Home Logout

Welcome to your Auto Attendant account

Active Schedule:
[In Hours](#)

Emergency Override: **OFF**

Auto Attendant Setup

We'll get you up and running with your new account in three easy steps! Just follow some simple directions, answer some questions, and you'll be all set.

1 DIRECTORY SETUP 2 SCHEDULES SETUP 3 MENU SETUP

Auto Attendant Account
[Security](#) - Change your Passcode.

Name and TN for AA

In hours greeting is default

3 steps to set up your AA

Build your Directory

The screenshot shows the FairPoint Auto Attendant web interface. The browser title is "FairPoint Auto Attendant - Microsoft Internet Explorer provided by FairPoint Communications". The address bar shows "http://www2.fms.fairpoint.com/0374000T0b/cgi-bin/vsroom". The page header includes the FairPoint logo, "Auto Attendant", and navigation links for "Setup" and "Account". The main content area has a "Directory" tab selected, with sub-tabs for "Add Entry", "Options", and "Export". A search bar is visible with "All" selected and an "OK" button. Below the search bar, there is a table with the following structure:

| Directory: All | | | | |
|--------------------|----------------|-----------|--------|---------------|
| Name (last, first) | Name recording | Extension | Action | Email address |
| | | | | |

A green circle highlights the "Add Entry" button, and a green arrow points from it to a text box that says "Click Add Entry to start creating your Directory".

Add Entry to Directory

Enter First Name, Last Name, Extension #

Enter number to be dialed or mailbox number

Choose Action: Dial or Go to Account

FairPoint Auto Attendant - Microsoft Internet Explorer provided by FairPoint Communications

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Recycle Bin Mail Desktop Search

Address http://www2.fvms.fairpoint.com/0674000aAV/cgi-bin/vsroom

FairPoint communications Auto Attendant Setup Account Training State of Vermont 802-555-1250 Home Logout

Directory Schedules Menus

Add Entry Options Export Search: All OK

Please enter the name of the person to add to the Directory, along with an extension, email address, and then the action to take when the caller selects that extension.

First name: Last name: Extension: Action: Email address:

(optional)

Directory: All

| Name (last, first) | Name recording | Extension | Action | Email address |
|--------------------|----------------|-----------|--------|---------------|
|--------------------|----------------|-----------|--------|---------------|

Options - Enable Dial by Name

When your caller selects the dial by name option by pressing #, they can search your Directory based on last name only, first name only, or both.

Last name First name Both

Directory: All

| Name (last, first) | Name recording | Extension | Action | Email address |
|--------------------|----------------|-----------|--------|---------------|
|--------------------|----------------|-----------|--------|---------------|

Click Directory Options, choose first name, last name or both. Then click SAVE

Create Schedules

Default is Open all day, In-Hours greeting and menu will play

Use pull down menus to select open from/to hours if you plan to use an Out-of-Hours Greeting

If you make changes, be sure to click SAVE before leaving this screen.

Select up to 16 holidays if you plan to use a special Holiday Greeting

FairPoint communications Auto Attendant

Setup Account

Training State of Vermont 802-555-1250 Home Logout

Directory Schedules Menus

This is your **In Hours** schedule. During the selected times, your In Hours greeting will be played. At all other times, your Out of Hours greeting will be played.

| Day | Open all day | From | To | Menu |
|-----------|--------------|------|----|------|
| Monday | Open all day | | | |
| Tuesday | Open all day | | | |
| Wednesday | Open all day | | | |
| Thursday | Open all day | | | |
| Friday | Open all day | | | |
| Saturday | Open all day | | | |
| Sunday | Open all day | | | |

Set to typical In Hours schedule: [Mon-Fri 9am-5pm](#)

This is your **Holiday** schedule. On the selected dates, your Holiday greeting will be played instead of your normally scheduled greeting. Add or remove dates from your list of Holidays. You can have up to 16 dates in your list.

0 of 16 Dates

Date: January 1 Add

Remove from list

Update Cancel

In-Hours Greeting Menu

Ext represents the key presses from each AA menu.

Use cursor to highlight a row and click EDIT to program for each key press

Training State of Vermont 802-555-1250 | Home | Logout

Directory Schedules **Menus**

In Hours Out of Hours Holiday Submenus

To set up the menu, first record the **In Hours Greeting** and then set up the extensions.

In Hours Greeting: **RECORD**

| Ext. | Name | Action |
|------|------|--------|
| 1 | | None |
| 2 | | None |
| 3 | | None |
| 4 | | None |
| 5 | | None |
| 6 | | None |
| 7 | | None |
| 8 | | None |
| 9 | | None |
| 0 | | None |

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Recording your Greetings

The screenshot shows the FairPoint Auto Attendant web interface. The main content area is titled "Change Greeting" and contains the following text:

Change your In Hours Greeting using the method you find most convenient.

Record your In Hours Greeting

Dial your Access Number and select appropriate menu options

or

Click [here](#) and we'll call you

or

Upload a WAV File:

The "In Hours Greeting" field is set to "RECORD". A table of extensions is visible in the background:

| Ext. | Name | Action |
|------|------|--------|
| 1 | | None |
| 2 | | None |
| 3 | | None |
| 4 | | None |
| 5 | | None |
| 6 | | None |
| 7 | | None |
| 8 | | None |
| 9 | | None |
| 0 | | None |

An "Explorer User Prompt" dialog box is open, showing the following text:

Script Prompt:

Enter a number where we'll call you to start recording.

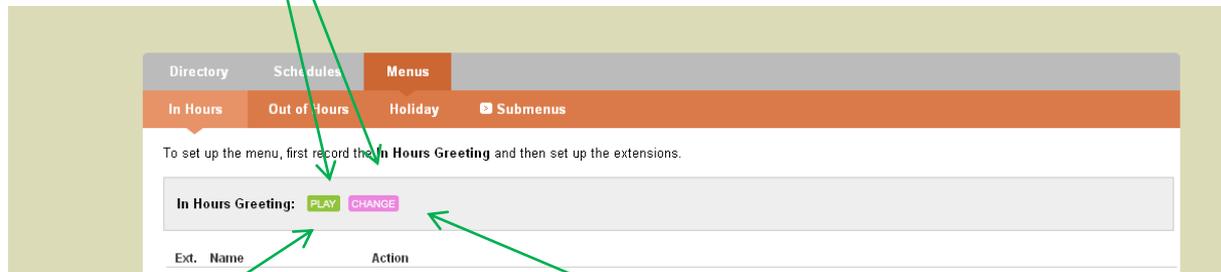
1. Click on the red RECORD button

2. Click to have the system call you or browse to upload a .wav file

3. Enter the number where the system should call you and click OK. (Think Centrex dialing plan when entering this number.)

To hear or change your greeting

Once you have recorded a greeting, you will see a green PLAY button and a pink CHANGE button



You can listen to your greeting through your PC speakers by pressing the green PLAY button

To change a greeting, press the pink CHANGE button and follow the directions to re-record the greeting

Select Routing Options

FairPoint Auto Attendant - Microsoft Internet Explorer provided by FairPoint Communications

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

Address http://www2.fvms.fairpoint.com/0374000T0b/cgi-bin/vsroom

FairPoint communications Auto Attendant Setup Account Training State of Vermont 802-555-1250 Home Logout

Directory Schedules **Menus**

In Hours Out of Hours Holiday Submenus 1 2 3 4 5 6 7

To set up the menu, first record the **In Hours Greeting** and then set up the extensions.

In Hours Greeting: RECORD

| Ext. | Name | Action |
|------|----------------------|--------|
| 1 | <input type="text"/> | None |
| 2 | <input type="text"/> | None |
| 3 | <input type="text"/> | None |
| 4 | <input type="text"/> | None |
| 5 | <input type="text"/> | None |
| 6 | <input type="text"/> | None |
| 7 | <input type="text"/> | None |
| 8 | <input type="text"/> | None |
| 9 | <input type="text"/> | None |
| 0 | <input type="text"/> | None |

UPDATE CANCEL

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Trusted sites

To program each key press, enter Name (label) and choose an Action

Program Routing Options

Directory Schedules **Menus**

In Hours Out of Hours Holiday Submenus

To set up the menu, first record the **In Hours Greeting** and then set up the extensions.

In Hours Greeting:

| Ext. | Name | Action | Ring: | No Answer: | UPDATE | CANCEL |
|------|------|-------------------|--------------|------------|---------------------------------------|---------------------------------------|
| 1 | | Dial Number | 30 secs | Disconnect | <input type="button" value="UPDATE"/> | <input type="button" value="CANCEL"/> |
| 2 | | Go to Account | | | <input type="button" value="UPDATE"/> | <input type="button" value="CANCEL"/> |
| 3 | | Dial by Extension | Digits: 5 | | <input type="button" value="UPDATE"/> | <input type="button" value="CANCEL"/> |
| 4 | | Submenu | 1 | | <input type="button" value="UPDATE"/> | <input type="button" value="CANCEL"/> |
| 5 | | Hunt | by: Circular | among: | <input type="button" value="UPDATE"/> | <input type="button" value="CANCEL"/> |
| 6 | | Announce | | | <input type="button" value="UPDATE"/> | <input type="button" value="CANCEL"/> |
| 7 | | None | | | | |
| 8 | | None | | | | |
| 9 | | None | | | | |
| 0 | | None | | | <input type="button" value="UPDATE"/> | <input type="button" value="CANCEL"/> |

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Enter information required for each Action type.

You must press UPDATE for each line to save information entered. All required information for each line must be entered to successfully UPDATE.

Program Submenus

Go directly to edit any submenu by pressing its number.

Program submenus using same process as for Greetings menus

| Ext. | Name | Action |
|------|------|--------|
| 1 | | None |
| 2 | | None |
| 3 | | None |
| 4 | | None |
| 5 | | None |
| 6 | | None |
| 7 | | None |
| 8 | | None |
| 9 | | None |
| 0 | | None |

Out-of-Hours Greeting

Out of Hours Greeting: **RECORD**

| Ext. | Name | Action |
|------|------|--------|
| 1 | | None |
| 2 | | None |
| 3 | | None |
| 4 | | None |
| 5 | | None |
| 6 | | None |
| 7 | | None |
| 8 | | None |
| 9 | | None |
| 0 | | None |

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Program only if you want your callers to hear a different greeting and menu options when they call outside of normal business hours

Holiday Greeting

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Directory Schedules **Menu**

In Hours Out of Hours **Holiday** Submenus

To set up the menu, first record the **Holiday Greeting** and then set up the extensions.

Holiday Greeting: **RECORD**

| Ext. | Name | Action |
|------|------|--------|
| 1 | | None |
| 2 | | None |
| 3 | | None |
| 4 | | None |
| 5 | | None |
| 6 | | None |
| 7 | | None |
| 8 | | None |
| 9 | | None |
| 0 | | None |

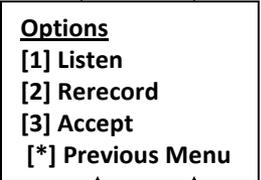
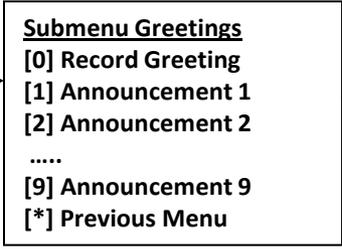
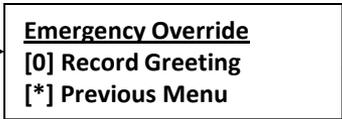
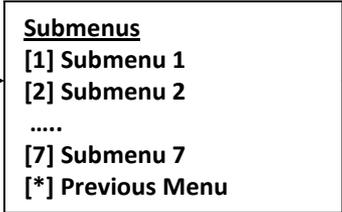
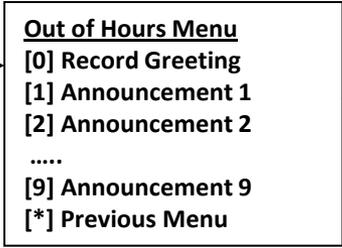
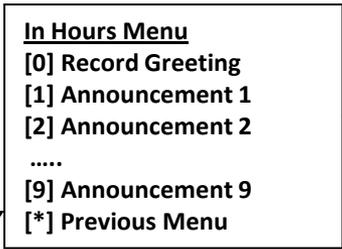
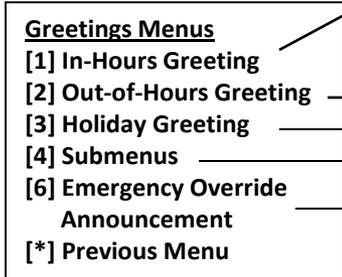
[Print this page for your records](#)

Program only if you want your callers to hear a special holiday greeting and menu options when they call on a holiday

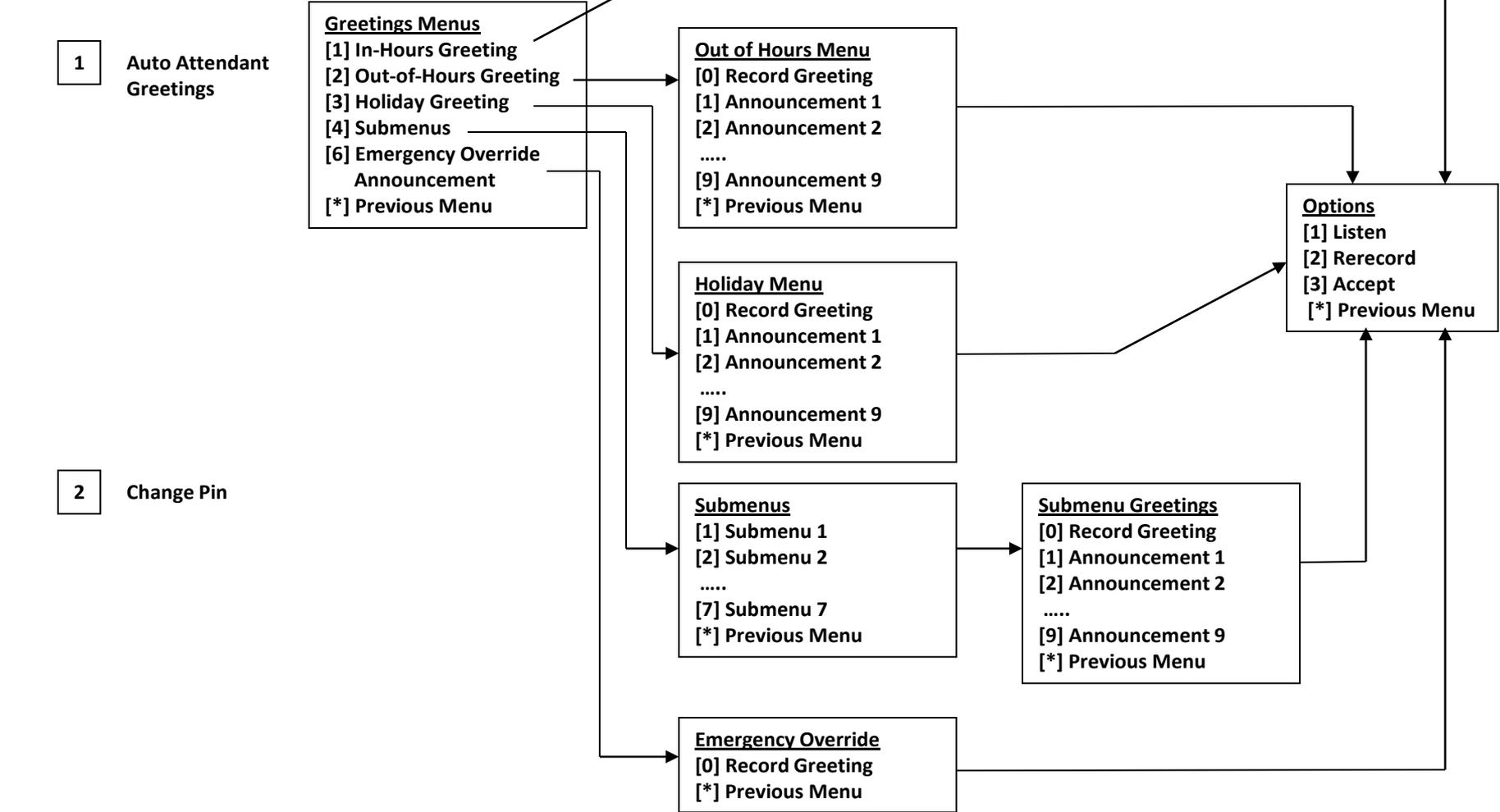
FairPoint
Auto Attendant Menu
Telephone User Interface

Press 00

1 Auto Attendant Greetings



2 Change Pin



Questions?



APPENDIX

Auto Attendant Design Overview

- An Auto Attendant creates a professional caller interface to your business.
- An AA represents a “front door” to your business and should effectively route callers – no “voice mail jail”.
- When designing your AA, always keep your callers in mind:
 - Let callers dial extensions, select from menu options, or both?
 - Frequently asked questions you could record into an informational announcement?
 - Different menus during business hours, after hours, and holidays?
 - Provide live attendant option?
- When designed well, the needs of both your business and your callers will be met.

AA - Other Design Considerations

- Consider using a branding statement in your greeting to welcome callers to the application: *“Thank you for calling XYZ Company”*
- Consider stating your “regular business hours” in your greeting(s).
- Put popular or frequently used options first in the menu.
- Keep options short and direct for easy understanding by all callers.
- If you will be supporting multiple languages, use the main menu to route callers immediately to in-language submenus.
- If you have callers who still use rotary phones, always include an operator option in the main menu. Keep in mind that a menu plays 3 times before a call is transferred to the number programmed for extension 0 (Operator).
- Never route a caller back to the auto attendant phone number.
- Offer a live attendant option when possible.
- Consider diagramming your AA application in Word or other desktop software to document scripting for easy reference and updating.

AA- Call Routing Options

As you design your application, you will need to understand the call routing options available to you. These routing options include;

- Dial Number – Transfers the caller to a phone number that you program.
- Go to Account – Transfers the caller directly to a mailbox to leave a message, to an information mailbox, or to another Auto Attendant.
- Dial by Extension – Allows the caller to enter an extension number (Centrex line) and be transferred to the phone line of their choice. Note that this feature requires a Directory.
- Submenu – Transfers the caller to another menu to hear more routing choices.
- Hunt – Allows callers to be transferred to more than one phone number using a single key press. You can specify up to 4 numbers and direct how those numbers will be used: sequentially (circle), randomly, in order (starting with the first number), or least called.
- Announce – Plays an announcement to callers, then allow them to replay the information or return to the previous menu.

AA- Announcements

- Announcements are normally used to provide information to callers like hours of operation, directions, mailing address, or other information that is commonly requested by your callers
- Callers can be routed to announcements within the auto attendant, rather than to a separate Information-only mailbox.
- Since announcements are part of the Auto Attendant, callers can “star” back to previous menus and choose other call routing options.
- The number of announcements available is limited only by the number of key press options available within the various menus.

OVERVIEW OF THE VOICE MAIL CONVERSION PROJECT

What is the same?

- Same access numbers for message deposit & retrieval
- Same capacity: number of messages, storage time, greeting length
- Main menu keys: Listen, Send, Personal Options
- Playback menu keys: Replay, Save, Erase, Reply, Forward/Copy
- Retained features:
 - Personal greeting, extended absence greeting, busy greeting
 - Outdial Notifications - Special Delivery & Pager Notification
 - Mailbox-to-Mailbox messaging
 - Message delivery options: urgent, private, receipt, future delivery
 - Group lists
 - Fictitious mailbox numbers
- Support for in-Centrex extension transfers
- FairPoint service and support

What is different?

- No State of VT Location Greeting when accessing away from the office
- Message Play Menu and Post Playback Menu
 - Message Play: slower, faster, louder
 - Post Playback: hear date/time stamp, recover deleted message
- New features:
 - Prompt Options: Full prompt, quick prompts
 - System greeting options: with name, with number, without name or number
 - Extended Absence Greeting scheduling
 - Message preferences: envelope, auto play, sort order, voice sender's caller ID
 - SMS notification option
 - Pager Notification self-provisioning
 - Message Retention: Old messages may be heard one final time before they are removed from the system

Actions Required

When the new system is ready and prior to conversion:

- Initialize your new mailboxes on the new system
 - Dial the temporary access number
 - The temporary number will be provided to you and is used only to set up the new mailbox on the new system. It will never be used to hear messages.
 - Enter your starter password (last 4 digits of mailbox/phone number)
 - Change your password
 - Record your name
 - Record your personal greeting & busy greeting
- Set desired Notification Options & Message Preferences
- Continue to access your current mailbox using your current access number

Once the conversion is complete, continue to use your current access number to reach your new mailbox. For 30 days after conversion, use key press 7 from your new main mailbox menu to hear messages stored on the old system.