

Smithville Cloud Voice

Easy Attendant Set-up Guide

Welcome to Smithville Cloud Voice!

IMPORTANT: *Easy Attendant* MUST be set up on the day of your Cloud Voice install

Easy Attendant is an automated receptionist service. When turned on, it answers your calls automatically, and offers your callers a list of options—a *menu* that you define. You can allow your callers to listen to messages—such as your open hours, 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. Or, for any other inquiries please press 0.

If you wish, you can offer your callers different menus depending upon whether you are currently open or not. For example, when Bob's Tires is closed, they might offer this menu instead:

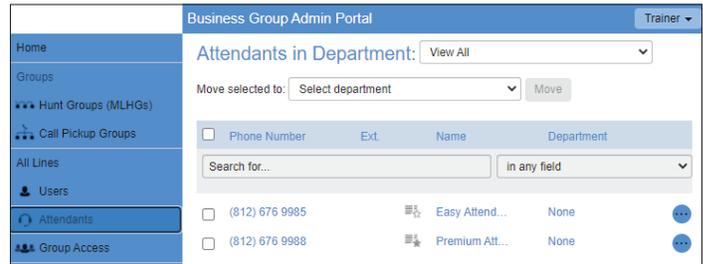
Welcome to Bob's Tires. We are currently closed. For directions to our store, press 1. For our hours of operation, press 2. If you wish to leave a message, press 3, and we will get back to you as soon as possible.

Once you have told *Easy Attendant* the hours and days that you open, it will automatically play callers the correct menu depending on when they call.

Please note that the Smithville Cloud Voice *Easy Attendant*, cannot reroute the caller back to the menu. Only Smithville's *Premium Attendant* is able to do that. Call us at (800) 742-4084 to add *Premium Attendant* to your account.

Important Information

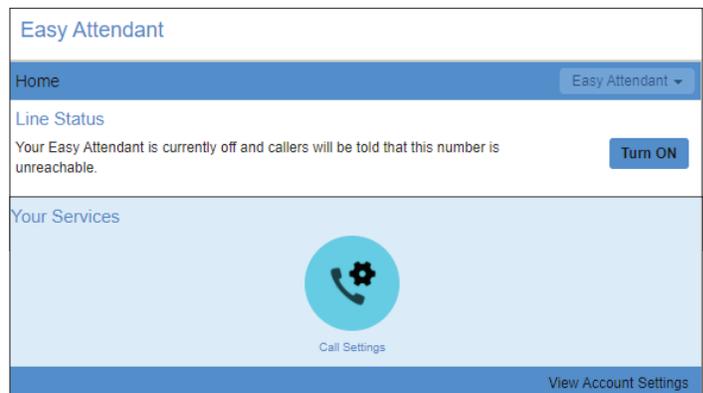
Easy Attendant MUST be set up on or before your installation date. If the *Easy Attendant* is not set up prior to your new Cloud Voice service connection time, your calls will not be automatically answered properly.



To Access *Easy Attendant Settings* via the *CommPortal* go to the *Business Group Administrator Web Portal*, Select *All Lines*, *Attendants*, and then *Easy Attendant*

First time setup

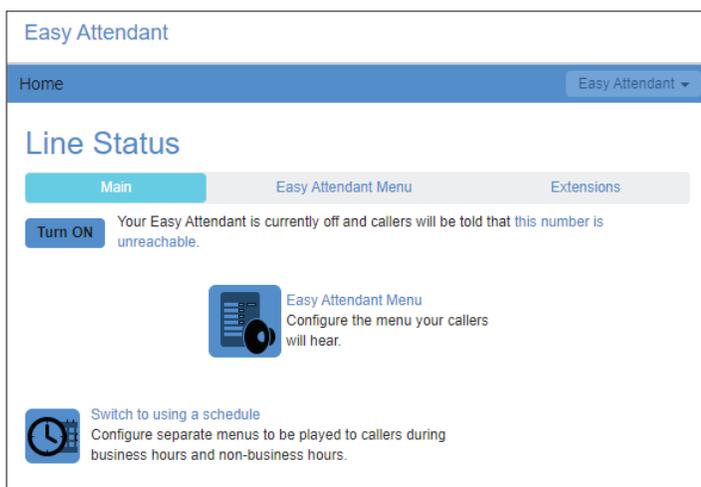
1. The first time you configure *Easy Attendant*, you will be asked to choose whether to offer your callers different menus during business hours and outside of business hours. If Smithville has already set this up for you, and you wish to change this setting, see schedule/single menu modes before you follow the rest of these instructions.
2. Configure the menu (or menus) that you wish to offer your callers.
3. If you chose to offer the option to dial by extension or name, configure the extensions your callers can dial.
4. If you chose to use different menus during business hours and outside of business hours, configure your business hours.
5. You can elect to configure a number to forward callers to while your *Easy Attendant* is turned off. If you skip this step, until you have finished setting up the service, callers to your *Easy Attendant* will be played a message saying that the number is unreachable.



Menus

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

If you have chosen to offer different options during business hours and outside of business hours, you will need to configure two separate menus: your **Business Hours Menu** and your **Non-Business Hours Menu**. If you have chosen to offer the same options at all times, you will simply need to configure a single **Easy Attendant Menu**. In each case, you can select the menu or menus you need to configure using the corresponding tabs at the top of your **Easy Attendant** page.



The configuration for an **Easy Attendant** menu consists of the following.

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

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

- The details of what should happen when a caller selects a particular option. For example, as part of setting up the **Easy Attendant** for Bob's Tires, you would configure key 1 to play an announcement and then record the announcement where you give directions to the store.

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

1. Navigate to the menu configuration screen by clicking on the appropriate tab (as described above).
2. Configure the options that you want to offer to your callers.

The menu configuration screen lists the keys 0-9. Alongside each key, you will see a drop-down box, where you can use to select what will happen when a caller presses that corresponding number on their phone.

For each option that you wish to offer your callers, decide which key they will press to access it, and select the appropriate option from the corresponding drop-down. For example, if you want to play an announcement describing your opening hours when a caller presses 2, you would assign key 2 to **Play announcement**.

For each key, with the exception of key 0 (see below), you can choose from the following options:

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

Play announcement—if a caller presses this key, they will be played a message that you have recorded. If you assign a key to **Play announcement** you must also record the announcement you want to play, either by clicking on the record that appears to the right of the drop-down, or by dialing the appropriate service access number from your telephone. See recording announcements.

Transfer to phone—if a caller presses this key, they are transferred to a phone number of your choice. For example, you might want to allow callers to **press 4 to speak to a sales representative**. You must also enter the phone number you wish to transfer to in the box that will appear to the right of the drop-down. Enter the phone number exactly as you would dial it from a phone.

Dial by extension—if a caller presses this key, they can choose who they want to speak to within your organization by dialing an extension number.

If you assign a key to dial by extension, you must also define the set of extensions that your callers can enter, their names and the phone numbers that each will transfer to.

Note: do not attempt to do this until you have finished configuring your menu and have applied your changes.

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

- Define the set of extensions that your callers can enter, their names and the phone numbers that each will transfer to. **Note:** do not attempt to do this until you have finished configuring your menu and have applied your changes.
- Give your callers suitable instructions as part of your greeting—which you will record in step 3 below. For example, if you assign key 4 to **dial by name**, then your initial greeting should include something like: *if you know the name of the person you require, press 4, and then enter the name followed by the pound key.*

Transfer to voicemail—if a caller presses this key, they will be transferred directly to a voice mailbox of your choice and invited to leave a message. For example, you might want to allow callers to *press 5 to leave a message for our sales person*. You must also enter the 10 digit phone number of the mailbox you wish to transfer to in the box that will appear to the right of the drop-down.

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

3. Record your initial greeting either by clicking on record in the **Record initial greeting** panel, or by dialing the appropriate service access number from your telephone. See recording announcements. Your initial greeting should describe all of the options that your callers can select—so it should mention each key that you have set to something other than **unassigned** in step 2.

After you have set up your configuration, you can change it at any time by reassigning keys or updating announcements.

If you change the options that you offer to your callers, remember to re-record your initial greeting as well!

Extensions

If you have chosen to offer your callers a **dial by** option, then you can configure the set of extensions they can dial in two ways:

Business Group Extensions—are the list of lines, or seats, within your Business Group. Additional numbers are only displayed if an extension has been configured

(the main number is always included). You can configure which extensions are exposed to callers as follows:

- For each extension, you can select whether or not to include it in the list available to callers.
- Any new lines added to the Business Group will automatically be included in or excluded from the set available to callers, based on the **Automatically include new extensions as they are added to the Business Group** setting.

Lines within the Business Group which are available to callers appear in bold. Lines will automatically be available for caller actions.

To include selected lines in **Dial by Name** actions, you need to make sure that a name recording is available for that line. The name recording can come from one of two places:

- You may record or upload a name recording by clicking on the **record** link for the line.
- If the line already has a name recorded for voicemail, then this can be used as the name recording for callers.

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 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.

If a given line has both name recordings available, then the one you have recorded for use in this business group will be used in preference.

Additional Extensions—to use **additional extensions**, you must define the set of extensions which callers can dial. For each extension you must specify the extension number—a short number of your choice, such as 107, the extension's name and the phone number that your caller should be transferred to if they dial this extension.

To add a new extension, you will need to supply the following:

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

- **Name.** This is the name that your callers will dial. Both the first and last name must contain at least 2 dialable characters.
- **Telephone Number.** This is the number that callers will be transferred to if they dial this extension. Enter the phone number exactly as you would dial it from a phone (although note that business group short codes and extension codes are not permitted).

You will also be prompted to record a spoken name for this extension. This is played to callers if they enter a name that is not unique to allow them to refine their search. For example, if there are two extensions called *John* and the caller enters *John*, they hear the full names of both the extensions and can choose between them. Extensions that don't have a spoken name recorded can't be reached by *dial by name* options.

Turning Easy Attendant on/off

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

Schedules

Easy Attendant has two different modes.

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

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

Recording

Easy Attendant offers two ways to record your messages.

1. If your computer has a sound card and microphone, you can use these to record your messages directly from the *Easy Attendant* configuration pages.

2. Alternatively, if you do not have the necessary equipment (or if you simply prefer), you can record your messages using your telephone.

Telephone Dial-in Easy Attendant Instructions

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

- Follow the instructions above for setting up your *Easy Attendant* menu, but don't click on any of the record links that appear.
- Once you have configured your menu options, press **Apply** as usual to save your changes. You will be warned that you have not yet recorded an initial greeting, and if you have assigned any keys to **Play announcement**, you will also be warned that you have not recorded the announcements to play—*ignore this warning*.
- Dial your *Easy Attendant* service access number from your telephone and select the appropriate options from the menu you will hear. You will be given the opportunity to record your initial greeting, as well as the announcements for any **Play announcement** keys you have set up.

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

Creating announcements for a single menu from any telephone:

To record announcements from any telephone, you will log into the voicemail system using your *Easy Attendant access number* and your *Smithville-provided EAS PIN*.

To Record from any Cloud Voice systems phone, Press the **VM Key** or dial ***98**

Note: If the Telephone Mailbox information has been set to **Fast Login** and/or **Skip PIN** on the system phone you are using, press * to enter the *Easy Attendant access number* and *PIN*.

To Record from anywhere else,

Dial the associated Voice Mail Access Number:

Bedford	(812) 804-1101
Bloomington	(812) 918-0101
Columbus	(812) 669-5101
Ellettsville	(812) 935-0080
French Lick	(812) 936-0080
Gosport	(812) 935-0080
Griffin	(812) 851-0080
Hymera	(812) 383-0080
Jasper	(812) 559-0101
Lake Monroe	(812) 824-0080
Lizton	(317) 994-0080
Lyons	(812) 659-0080
Nashville	(812) 200-1101
Owensburg	(812) 863-0080
Sharpsville	(765) 963-0080
Smithville	(812) 824-0080
Stanford	(812) 825-0080

1. Enter your *Easy Attendant 10-digit access number* and **press #**.

2. Enter the *EAS PIN* and **press #**.

Note: The first time you log on, you will be prompted to change your *EAS PIN*.

3. **Press 1** to change your *Easy Attendant Configuration* (turn on/off).

4. **Press 1** to *Turn On* or *Off*.

Note: You will not be able to *Turn On*, until you have recorded an announcement.

5. **Press 2** to edit announcements. The system advises which announcements are not recorded. Follow the voice prompts to select which announcement to record. Begin recording at the tone. When finished recording, **press #** and the recording will play back.

6. **Press 1** to save the recording.

7. **Press 2** to re-record.

8. **Press 3** to exit without saving changes.

9. **Press 4** to continue recording where you left off.

10. **Press *** to return to the *Main menu*.

Note: To use *Business Hours/Non-Business Hours announcements*, a schedule must be created via the *CommPortal*.