

# Smithville Cloud Voice

## Premium Attendant User Guide

### Introduction

Smithville's advanced *Premium Attendant* is a self-managed automated attendant receptionist service that allows you to configure a flexible set of Telephone User Interface (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. When using the full capabilities of the schedules, calls can be handled differently at different times of day and different days of the week.

**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 inquiries please press 0.*

You can create different menus for different times of the day and week that play according to the predefined schedules that you have created.

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

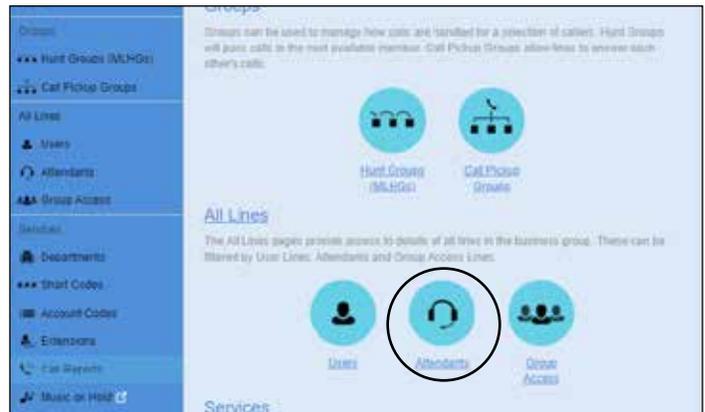
Once you have set up *Premium Attendant* with these schedules and menus and recorded the necessary announcements, it will automatically play callers the correct menu depending on when they call.

### This guide will walk you through:

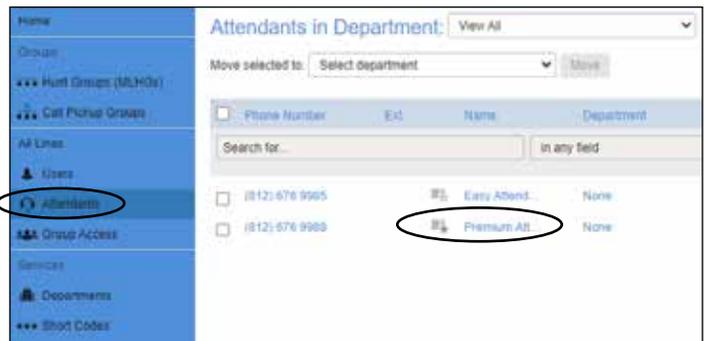
1. All of the basic controls of your Premium Attendant
2. How to set up your *Premium Attendant* for the first time (see page 8)
3. How to make changes (see page 9)

To configure your *Premium Attendant*, you will first need to log into the Business Group Admin CommPortal.

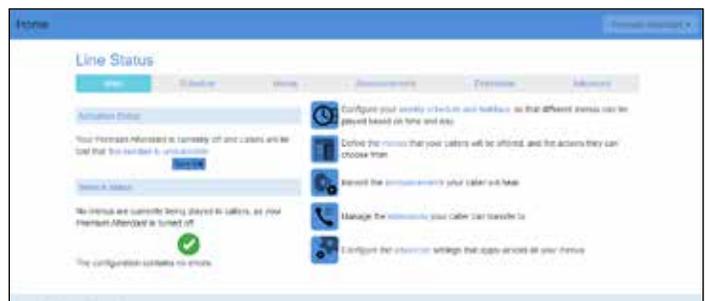
Once inside, navigate to the *Attendants* controls.



Select *Attendants* and then *Premium Attendant*



Once selected, you will see the *Line Status* menu.



## Navigating the Tabs

### Schedules

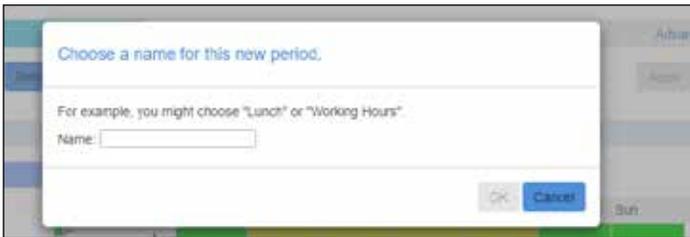
You can configure up to eight *Premium Attendant* schedule periods. For example you might create one schedule for your normal business hours, a second schedule to cover the lunch period and an out of hours schedule for when your business is closed. You can create a separate menu for each of the schedules that you define.

**To create a new schedule:** If this is the first time you have opened the Schedule tab, you can click on the links to either use a blank schedule or an example schedule as the basis for your new schedule. At all other times, use the **Add New Period** button to create a new schedule.

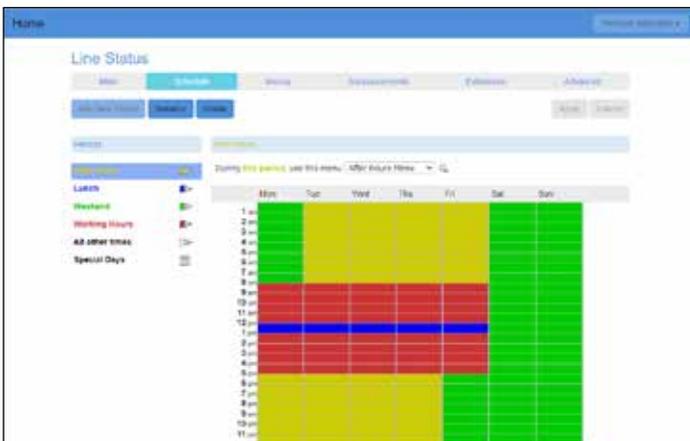


You will see a warning pop-up if you attempt to add a new period once you have configured the maximum number of schedule periods.

You will be prompted to give the new schedule a unique name, and a description.



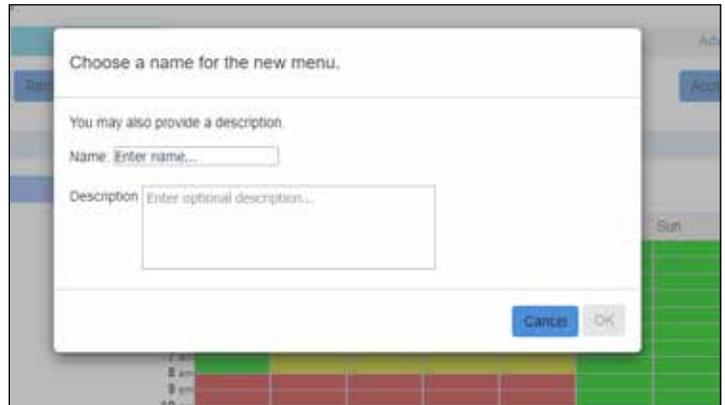
For each schedule that you create, you should configure the hours, for each day from Monday to Sunday, when this schedule should apply. You do this by “coloring in” the times for which the schedule applies by clicking on the appropriate cells. You can change several cells at once by clicking and dragging. Each schedule period is shown in a different color.



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



If you select **Create New Menu** you will then be 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 will configure this menu and its announcements later in the set-up process.



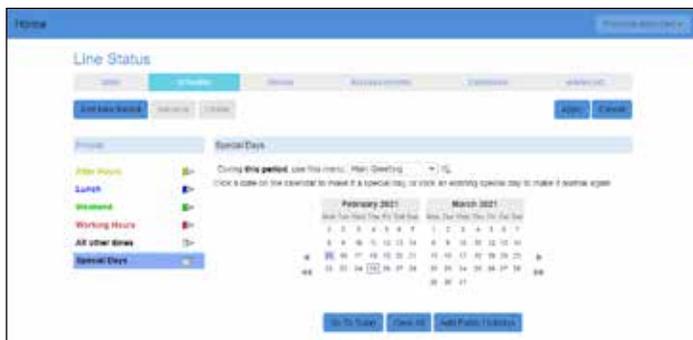
There are two schedule periods already created in this list to cover **At All Other Times** and **Special Days**.

The **At All Other Times** schedule is used at the times that are not defined in any of your other schedules. This schedule is always the penultimate schedule in the list and is colored in white.

The **Special Days** schedule covers public holidays and other special one-off days when your business is closed. This schedule is always the last schedule in the list and is colored in black.

You should select this schedule and use the calendar to configure any special one-off dates to be included in this schedule.

If you always close on public holidays, you can easily select all of the public holidays for your locale by clicking on the **Add Public Holidays** button.



When you have finished editing the schedule, press **Apply** to save your changes.

## Menus

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

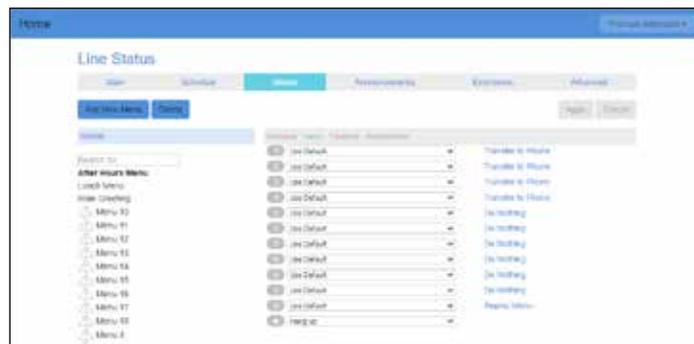
The following instructions describe how to set up and edit your *Premium Attendant* menus. You will need to repeat these steps for each of the menus that you need to create. From the Menu page, you should use the following tabs to set up and edit your *Premium Attendant* menus. The list of existing menus will always be visible in the left-hand panel of the screen—you should ensure that you have the correct menu selected before making any changes using the following tabs.



1. Use the **General** tab to add a new menu, or edit or delete a menu once you have selected it in the list on the left-hand side of the page.
2. Use the **Keys** tab to assign actions to the keys that a caller can press to navigate the menu
3. Use the **Timeout** tab if you wish to override the default timeout behavior for this menu
4. If you are editing or deleting an existing menu, use the **Reference** tab if you want to see if any other menus or periods make reference to this menu.

## Menus – Keys

You should use the **Keys** tab to specify what should happen when a caller selects a particular option from your menu.

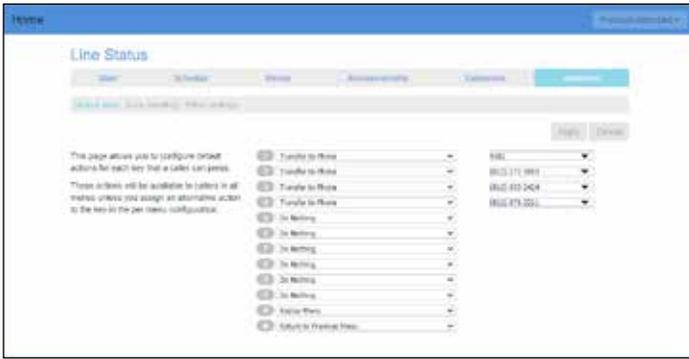


1. Navigate to the **Keys** tab by clicking on the **Menu** tab in *Premium Attendant* (as described above).
2. Ensure that the correct menu is selected on the left side of the screen.
3. Configure the options that you want to offer to your callers on the selected menu.

### For each key you can choose from the following options.

**Use Default**—If a caller presses this key the default action, configured using the **Advanced** tab will occur. This option is selected by default for all keys on new menus. If you select this option for a key, the default value will be shown in the next column as a link to the Default keys page on the **Advanced Settings** page. You can change the default behavior of these keys as described in **Advanced Settings**. If the default value is

**Do Nothing**—a caller will be told that the option is not recognized if they press this key.



**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.

**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 one of our sales team”. You must also enter the phone number of the mailbox you wish to transfer to in the box that will appear to the right of the drop-down. The number you enter must be the 10-digit phone number of a mailbox on this system.

**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 do the following:

- Define the set of extensions that your callers can enter 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 menu announcement. For example, if you assign key 4 to **Dial by Extension**, then your menu announcement should include wording similar to, “if you know the extension of the person you require, press 4, and then enter the extension followed by the pound key.”

**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 menu announcement. For example, if you assign key 4 to **Dial by Name**, then your menu announcement should include wording similar to, “if you know the name of the person you require, press 4, and then enter the name followed by the pound key.”

**Voicemail by Extension**—If a caller presses this key, after entering the required extension number, they are transferred directly to a mailbox without ringing the subscriber’s phone. You will see a pop-up if you enter a number that doesn’t have a mailbox. If you assign a key to **Voicemail by Extension**, you must also do both of the following.

- Define the set of extensions that your callers can enter 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 menu announcement. For example, if you assign key 4 to **Voicemail by Extension**, then your menu announcement should include wording similar to, “if you know the extension of the person you wish to leave a message for, press 4, and then enter the extension followed by the pound key.”

**Voicemail by Name**—If a caller presses this key, after entering the required name, they are transferred directly to a mailbox without ringing the subscriber’s phone. You will see a pop-up if you enter a name that doesn’t have a mailbox. If you assign a key to **Voicemail 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 the announcement. For example, if you assign key 4 to **Voicemail by Name**, then your announcement should include wording similar to, “if you know the name of

the person you wish to leave a message for, press 4, and then enter the name followed by the pound key.”

**Intercept Mailbox**—If a caller presses this key, they are transferred to the mailbox configured globally for *Premium Attendant*. The telephone number for this mailbox is configured using the **Advanced, Other Settings** tab.

**Go to Menu**—If a caller presses this key, they are transferred to another *Premium Attendant* menu. You should select the menu from the drop-down box or choose **Create New Menu**, entering a unique name and description for this menu in the pop-up that will appear. If you subsequently delete the menu linked to on this key, the drop-down will display **Select Menu** and the key action will be marked with an error.

**Return to Previous Menu**—If a caller presses this key, they are returned to the previous menu. If there is no previous menu to return to, *Premium Attendant* will simply replay the current menu.

**Replay Menu**—If a caller presses this key, *Premium Attendant* replays the current menu.

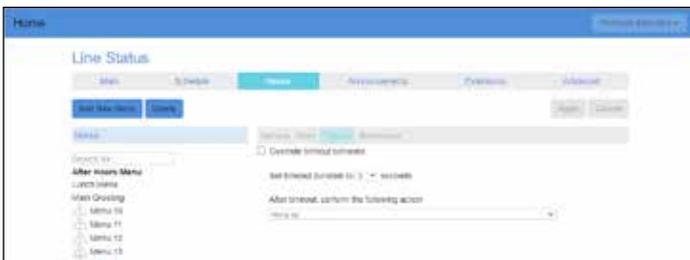
**Announcement - Return**—If the caller presses this key, they will hear an announcement and then be returned to the menu. You should use the drop-down box to select the announcement to use, or create a new one.

**Announcement Hang-up**—If the caller presses this key, they will hear an announcement and *Premium Attendant* will then hang up the call. You should use the drop-down box to select the announcement to use, or create a new one.

**Hang-up**—If a caller presses this key, *Premium Attendant* hangs up the call without playing an announcement.

## Menus - Timeout options

If you want to change the timeout behavior on an individual menu, use the **Timeout** tab to override the default timeout behavior for all your *Premium Attendant* menus set under the **Advanced** tab.



## Menus - References

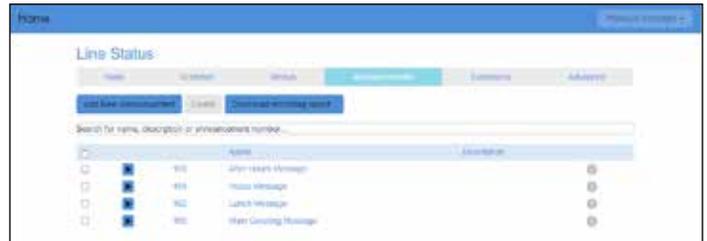
The **References** tab shows which menus and schedule periods make reference to the menu currently selected on the left side.

This feature is useful if you want to delete a menu, as you can only do this if the menu is not referenced by any menus or schedule periods.

## Announcements

The **Announcements** tab lists all the announcements that you have already created when setting up your menu configuration and uses icons to indicate the status of each one. As this list can be up to 300 items long, you can use the search box to find the announcement(s) you wish to work with, by typing in all or part of either the name or description, or using the recording ID number.

The list of announcements contains only those for which the recording can be changed. There are also system announcements, for instance the announcement played when the user presses an invalid key, that cannot be changed or listened to via the web interface.



The icons on the left side indicate the following:

-  A recording exists for this announcement. Clicking on the icon plays the announcement
-  A recording does not exist for this announcement.

The icons on the right side indicate the following:

-  The announcement is referenced by one or more menus
-  The announcement is not referenced by a menu
-  The announcement is referenced by a menu but does not have a recording.

You can use the **Download Recording Report** button to generate a CSV format list of all your announcements that will show the number, name and description of each announcement, plus whether audio is present and whether it is referenced by an existing menu. This process may take several minutes if you have a large number of announcements.

## Recording

*Premium 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 *Premium Attendant* configuration pages.
2. You can also record your messages using your telephone.

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

Follow the instructions above for setting up your *Premium Attendant* menu, but don't click on any of the record icons 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 *Premium 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 *Premium Attendant* menu, you must use the Web interface to assign the appropriate keys to **Play Announcement** before you can turn on your *Premium Attendant*.

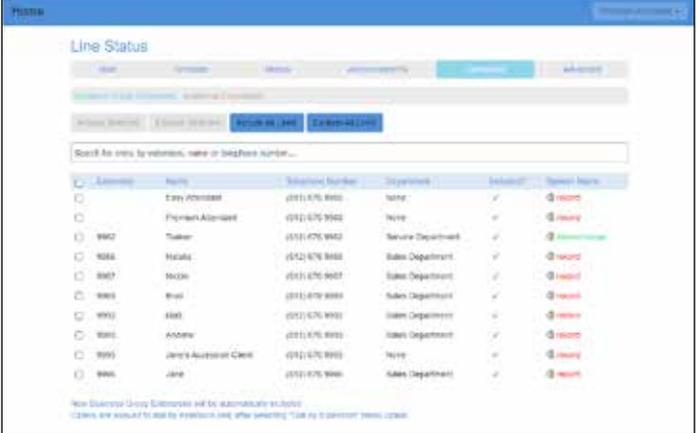
## Extensions

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** and **Additional Extensions**

### Extensions - Business Group Extensions

**Business Group Extensions** are the list of lines 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.



Extension	Name	Secondary Number	Department	Record
8000	Easy Attendant	(512) 676 9800	None	record
8001	Play Announcements	(512) 676 9801	None	record
8002	Tuition	(512) 676 9802	Finance Department	record
8003	Health	(512) 676 9803	Sales Department	record
8007	Medical	(512) 676 9807	Sales Department	record
8008	Real	(512) 676 9808	Sales Department	record
8010	Real	(512) 676 9810	Sales Department	record
8011	Andrea	(512) 676 9811	Sales Department	record
8013	Jerry's Assistant Client	(512) 676 9813	None	record
8014	Line	(512) 676 9814	Sales Department	record

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:

1. 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.

2. 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 numbers for a mailbox cannot be used for **Dial by Name** actions unless the additional number is attached to an undialable secondary group mailbox of the form number-X, AND both the undialable number and additional number are included in the list. A caller entering the name of the subscriber will be put through to one of the subscriber's additional numbers and will be played the primary device's recorded

spoken name. If the primary device is marked as excluded, then the subscriber is excluded from **Dial by Name** actions even if there is an additional number marked as included.

## Extensions - 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 two 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. **Note:** 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.

## Dial Extension at Any Time

In the **Extensions** tab—and on its sub-tabs if present—a link just above the button bar in the bottom of the page allows you to configure whether callers are allowed to dial by extension at any time or only after selecting a **Dial by Extension** menu option.

**WARNING:** Enabling this feature will mean that callers to the TUI will not be able to navigate through several menus at once by entering multiple keys.

## Advanced Settings

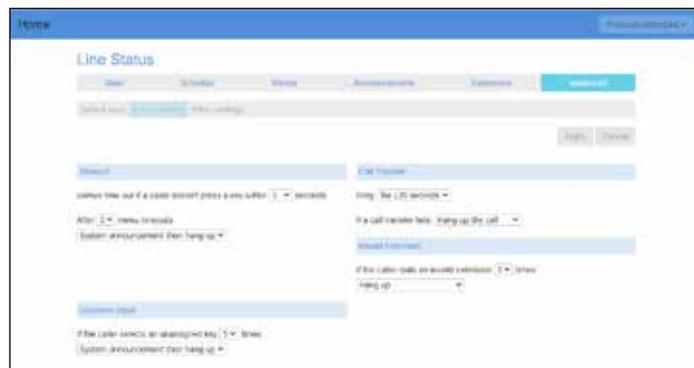
The Advanced tab allows you to configure the following settings for your *Premium Attendant* that will apply whenever you select a default value.

## Advanced - Default Keys

You can use the Default keys tab to configure the default action for the keys on the telephone. This determines what each key will do if it is set to **Use default** in any of your *Premium Attendant* menus.

## Advanced - Error Handling

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



**Timeout duration**—This defines the behavior of *Premium Attendant* if a caller fails to press a key within the specified time. (measured in seconds)

**Unknown input**—This defines the behavior of *Premium Attendant* if a caller presses a key that has not been assigned an action.

**Failed Attended Call Transfers**—This defines the behavior of *Premium Attendant* if a call transfer fails to be connected.

**Invalid extensions**—This determines the behavior of *Premium Attendant* if a caller presses an extension number that it does not recognize.

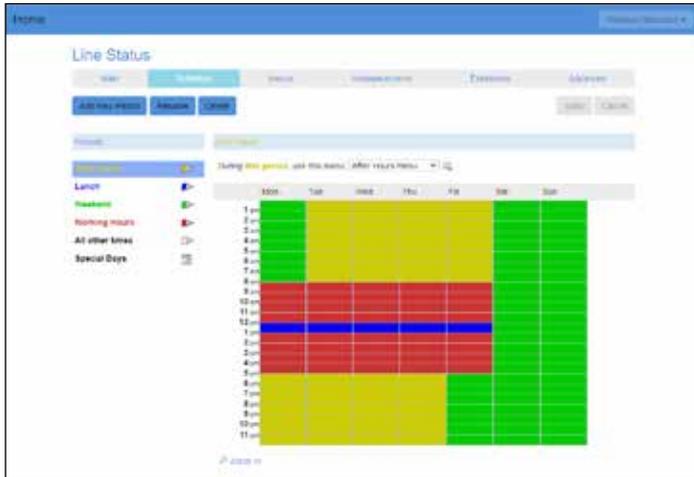
You will see an error icon next to the misconfigured event if you have made any errors in changing the default configuration for your *Premium Attendant*.

## First time setup

You may find it helpful to map your *Premium Attendant* menu and schedule period structure out on paper first, particularly if you will have several schedule periods and complex menu options.

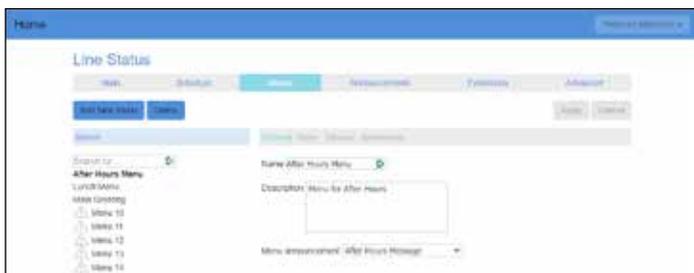
**To set up your *Premium Attendant*, you should take the following steps:**

Configure your *Premium Attendant* schedule periods by going to the **Schedule** tab and adding new periods.



On first use, these schedules will be shown as having errors until you have specified the opening menu that you wish to associate with each of these schedules. You will not be able to turn *Premium Attendant* on until you have selected these menus and created the necessary announcements. These two schedules cannot be deleted or renamed.

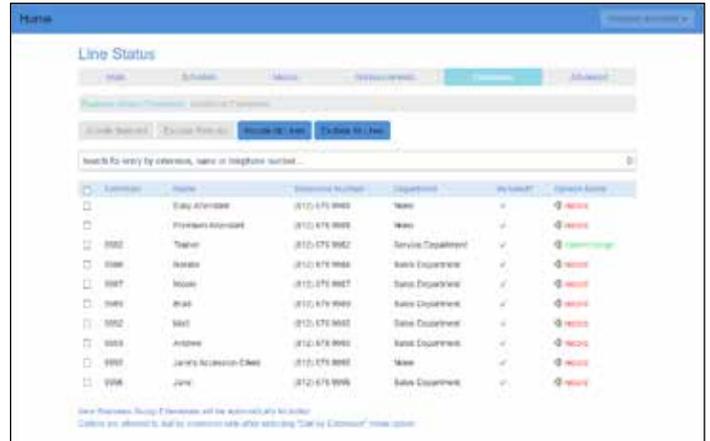
Configure the menus that you wish to offer your callers during the different schedule periods that you have just created.



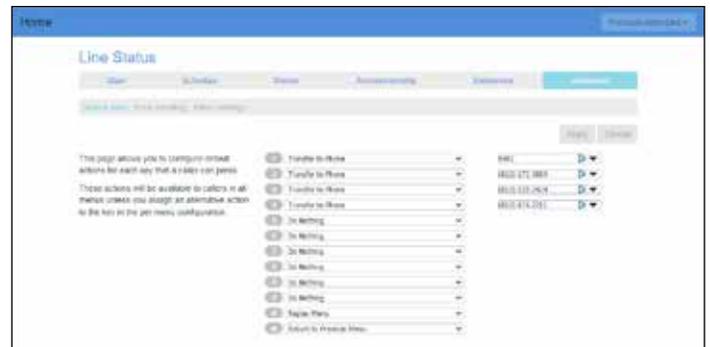
Record the announcements that your caller will hear for the menu options that require them.



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 can dial.

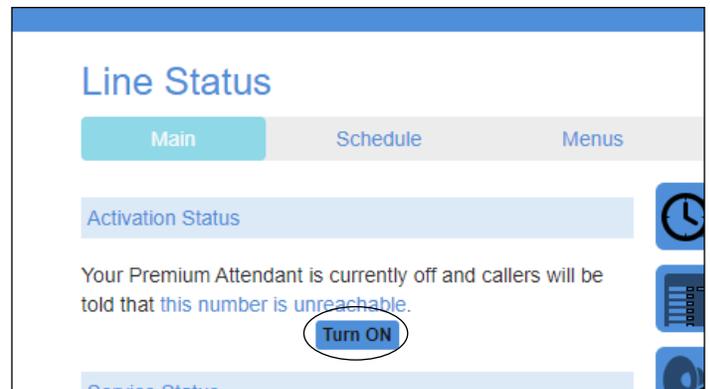


Use the **Advanced Settings** tab if you wish to change the default settings for the keys used in your menus or the way in which *Premium Attendant* handles caller error. Optionally, configure a number to forward callers to whilst your *Premium Attendant* is turned off.



## Turn on *Premium Attendant*

To turn your Premium On, simply click the **Turn On** Button. When your *Premium Attendant* is turned off, callers will be told that this number is unreachable.



## Making Changes

### Turning *Premium Attendant* on/off

When your *Premium 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 *Premium Attendant* turned on all of the time, but (depending upon how *Premium Attendant* has been deployed) you may, for example, wish to turn *Premium Attendant* off during the day and forward your callers directly to a live receptionist instead.

### Switching between schedule periods

If your *Premium Attendant* is turned on, you can only switch from one schedule period to another if the currently selected period has no errors in its menu selection.

## Having Trouble? Need Assistance?

With Smithville Assist, you'll receive top-notch assistance from our in-house technicians to help manage and operate your CommPortal when you need it. You simply state how you would like your Cloud Voice system to function and the Smithville Assist Team will make it happen.

**Smithville Assist - Unlimited** is available at an all-encompassing additional monthly rate or you can use **Smithville Assist - As You Need It** on a per Phone Call basis for \$45/half hour.

**Call us at (800) 742-4084 to take advantage of Smithville Assist.**