

Virtual Office Auto-Attendant User Guide

Version 1.0



Contents

Overview	3
Understanding the Auto-Attendant	3
Before you start	3
Online management.....	3
Initial set-up	4
Schedules and Greetings	4
About Profiles.....	4
Walk through, Initial set-up	5
Step 1: Time Zone	5
Step 2: Define Normal Business Hours.....	6
Step 3: Manage Business Hours Exceptions.....	6
Step 4: Manage Holidays	7
Step 5: Verify and Save Settings.....	8
Auto-Attendant Management.....	10
Profile Management	10
Auto-Attendant Management Workspace – Navigation.....	11
Auto-Attendant Management Workspace – Toolbar.....	11
Auto-Attendant Management Workspace – Navigation Tree	12
Auto-Attendant Management Workspace – Rules Workspace	12
Sample greeting scripts	14
Resources	15

Overview

Understanding the Auto-Attendant

The Packet8 Auto-Attendant (AA) is a powerful and flexible tool that is designed to answer and process your incoming phone calls. Your AA can be used as a virtual receptionist, allowing callers to navigate your phone system, or as an overflow and after-hours tool so that incoming calls are still handled promptly and properly.

Flexible:

Remember, you can change the AA configuration as your needs change. Simply select "Configure AA" under the "My Accounts" table.

There are a number of ways to use your AA. It is helpful to have an idea of how you would like to use the AA before trying to configure it. The steps outlined in this document cover the initial set-up and basic guidelines. For more advanced configurations, please contact your Packet8 Customer Service team.

Before you start

By using the AA, you will have the ability to present your inbound callers with a number of call routing options. This can sometimes include individual extensions or groups of extensions, called ring groups. **If you want to use extensions or ring groups with your AA, you must configure them before using them in your AA.** It is also useful to have an idea of how you want the AA to handle your calls and to understand what you want your callers to experience when they call your company. This will help you better define AA schedules and rules during the set-up process.

Ring Groups:

A method of assigning a single extension such as "201" to 2 or more direct extensions, such as 101, 102, 103, as a group, allowing a call to ring the entire group at once.

Online management

There are two "modes" for the AA configuration screens.

1. **First Time Use** – You will be required to define a schedule and will be presented with options for exceptions to rules and schedules.
2. **Management** – You will be able to navigate directly to different rules within your AA to edit them directly.

The AA is designed to apply "call-treatment" based on rules and schedules. To achieve this, you must first define a schedule. The schedule consists of two main periods: "Business Hours" and "After-Hours." In addition to these blocks of times, you will have the option to define exceptions for events, such as holidays, which can temporarily alter your normal schedules. Once you have completed the initial set-up, you will receive an email with instructions for recording your AA greetings and announcements.

As your needs change, or if you need to make corrections, you can return to the AA configuration screen at any time to update your AA.

Initial set-up

The first time you set-up your AA, you will be taken through a series of steps that will help you create a schedule and establish rules associated with that schedule. You will be asked to define a schedule, identify holidays and exceptions, and save your settings. After you have established a schedule, a Profile will be created for those settings. You will then be able to define the rules for each of these scheduled periods and will have the option to define how each call is routed.

Profiles:

- Configure and save settings and greetings
- Test a configuration without overwriting your current configuration
- Plan ahead for seasonal schedule changes

Schedules and Greetings

Your AA has two different modes; “Business Hours” and “After Hours.” You can record customized greetings for each mode. Your schedule will determine which greeting should be played. Each mode also has a set of IVR rules that you can customize. This allows your AA to manage incoming callers in a logical fashion such as transferring to an operator during business hours but only transferring to a voicemail box after hours. You can re-record a greeting at any time without changing the rules and also change the rules without changing the recording. It is important to ensure that your recorded greeting is accurate and matches the settings you have selected.

What is an IVR?

IVR stands for “Interactive Voice Response.” This allows the system to play an announcement and then allows the caller to press a number on the keypad to make a selection. For example: “Press 1 for sales” is played and the caller presses 1 on their phone. They are now routed to the sales extension.

Holidays and exceptions will override your “Business Hours” settings and apply the “After Hours” rules. At the end of the exception, your AA will go back to the normal schedule.

About Profiles

A Profile is like a configuration file. It is the record of your schedules and rules saved under a unique name. You can build multiple profiles to make managing your AA even more streamlined. Only one profile can be active at a time. Specific details for managing and using these profiles are found under the “Auto-Attendant Management” section of this guide.

Walk through, Initial set-up

During the initial set-up, you will see a navigation wizard [FIG.1] that will guide you through the process of establishing your schedule.

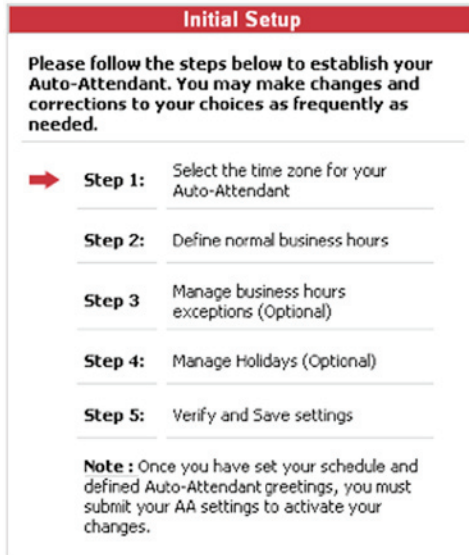


Figure #1

Step 1: Time Zone

This is the time zone your AA will use to determine scheduling rules. Your individual extensions may have the same or different time zone settings.

To select a time zone:

1. Click on the pull-down menu and select the time zone nearest your desired location.
2. Click **[NEXT]** to continue.

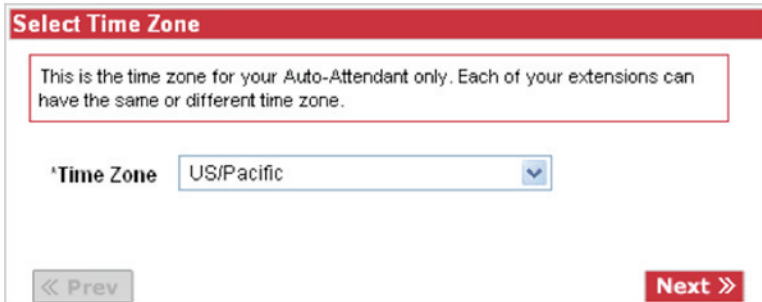


Figure #2

Step 2: Define Normal Business Hours

“Business Hours” represents the times and days for which your AA will use the “Business Hours” greetings and rules. The default settings are for Monday through Friday, from 8:00 am until 5:00 pm.

To define “Business Hours”:

1. Select the days of the week by clicking the check box next to each day. A green check mark indicates that the day is included in the “Business Hours” schedule for the defined range of hours.
2. Define a range of hours. You must enter a value for both a start and end time for each day that has been selected. The proper format for entering a time is either HOURLA/P (8a or 3p) or HH:MM:AM/PM (8:00am).
3. Click **[NEXT]** to continue or click **[PREV]** to return to time zone.

What is After Hours?

The “After Hours” schedule represents all of the hours that are not defined as Business Hours, Business Hours Exceptions or Holidays. The “After Hours” time period has its own set of rules that will be applied any time there is not already a rule defined.

Define Business Hours

Use the table below to select business days and hours. The Auto-Attendant will use the Business hours rules during these times.

		Start (e.g. 8:00AM)	End (e.g. 5:00PM)
Sunday	<input type="checkbox"/>		
Monday	<input checked="" type="checkbox"/>	8:00AM	5:00PM
Tuesday	<input checked="" type="checkbox"/>	8:00AM	5:00PM
Wednesday	<input checked="" type="checkbox"/>	8:00AM	5:00PM
Thursday	<input checked="" type="checkbox"/>	8:00AM	5:00PM
Friday	<input checked="" type="checkbox"/>	8:00AM	5:00PM
Saturday	<input type="checkbox"/>		

Your Auto-Attendant will play your standard greeting during Business hours and can play an alternative greeting for After hours. You can make changes to these rules at any time.

<< Prev **Next >>**

Figure #3

Step 3: Manage Business Hours Exceptions

“Business Hours” exceptions allow you to temporarily adjust your normal “Business Hours” schedule for a given date. This is useful if you sometimes have shorter working hours due to company events. For example, your normal “Business Hours” schedule is set from 8am to 5pm, but next Monday, your office will be out at a business confer-

ence until 2pm. You can set an exception for 2pm until 5pm to override your normal hours and allow the "After Hours" rules and greeting to be played until 2pm. After that, your normal schedules and rules will automatically be applied.

To define an exception:

1. Select the date you want the exception to take place by clicking on the calendar icon or entering text. The format is MM/DD/YYYY.
2. Define a range of hours. You must enter a value for both a start and end time for each date that has been created. The proper format for entering a time is either HOURS/P (8a or 3p) or HH:MM:AM/PM (8:00am).
3. Add additional exceptions, if needed, by clicking the [+] icon and following steps 1 and 2.
4. Remove unwanted exceptions by clicking the [-] icon.
5. Click [NEXT] to continue or [PREV] to return to "Business Hours".

Date	Start (e.g. 8:00AM)	End (e.g. 5:00PM)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Figure #4

Step 4: Manage Holidays

Holidays are special exceptions. For each date you define, the AA will play your pre-recorded Holiday greeting and apply the "Holiday" rules. You will be able to define "Holiday" rules once you have at least one date set for a Holiday. You may add additional Holiday entries, but they will all share the same recording and rules. If you want a greeting that names the holiday, you would need to re-record the greeting prior to each holiday.

To define a Holiday:

1. Select the date for the Holiday by clicking on the calendar icon or entering text. The format is MM/DD/YYYY.
2. Add a description by typing in the Description field.
3. Add additional Holidays, if needed, by clicking the [+] icon.
4. Remove unwanted Holidays by clicking the [-] icon.

5. Click **[NEXT]** to continue or **[PREV]** to return to “Business Hours Exceptions”.

Manage Holidays

Use this table to Manage holidays. Holiday rules will override your normal business hours rules and will play your holiday greetings.

Date	Description
<input type="text" value="31"/>	<input type="text"/>

« Prev **Next »**

Figure #5

Step 5: Verify and Save Settings

You are presented with a summary screen that displays your settings. If they are correct, you may click **[SAVE SETTINGS]** to continue. Otherwise, click **[PREV]** to return to the Holiday screen.

Select Time Zone

Time Zone US/Pacific

Define Business Hours

	Start (e.g. 8:00AM)	End (e.g. 5:00PM)
Sunday	<input type="checkbox"/>	
Monday	<input checked="" type="checkbox"/>	8:00AM 5:00PM
Tuesday	<input checked="" type="checkbox"/>	8:00AM 5:00PM
Wednesday	<input checked="" type="checkbox"/>	8:00AM 5:00PM
Thursday	<input checked="" type="checkbox"/>	8:00AM 5:00PM
Friday	<input checked="" type="checkbox"/>	8:00AM 5:00PM
Saturday	<input type="checkbox"/>	

Manage Business Hours Exceptions

Date	Start (e.g. 8:00AM)	End (e.g. 5:00PM)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Manage Holidays

Date	Description
<input type="text"/>	<input type="text"/>

Please review your settings. If these settings are correct, please click the "save settings" button to continue.

« Prev **Save Settings** **Next »**

Figure #6

Once you have successfully saved your schedule settings, you will be taken to the manage profile section [FIG. 7]. A confirmation that your settings have been saved as “Profile 1” will be displayed. Now that you have established a profile for your AA, you must define the rules for this profile. To do this, click the [EDIT] button for Profile 1.

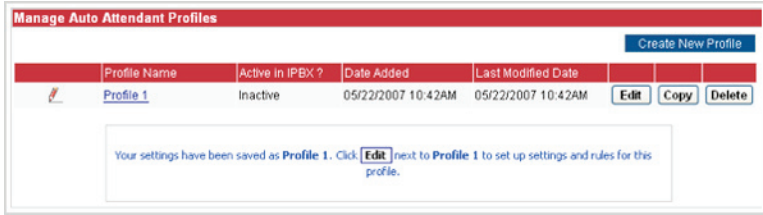


Figure #7

By clicking [EDIT], you will be taken to the AA management workspace for “Profile 1.” This workspace has 3 key elements.

1. A toolbar that gives you quick access to the profile manager, help files, and a tool to upload and activate your settings. It also provides useful information about the system you are currently working on; Company Name, Profile Name, IPBX Name, and the status of the current profile.
2. Auto-Attendant navigation tree that allows you to drill down to the specific rules set that you wish to modify.
3. Rules workspace where you are presented with the configurable options for the rules set you are currently editing.

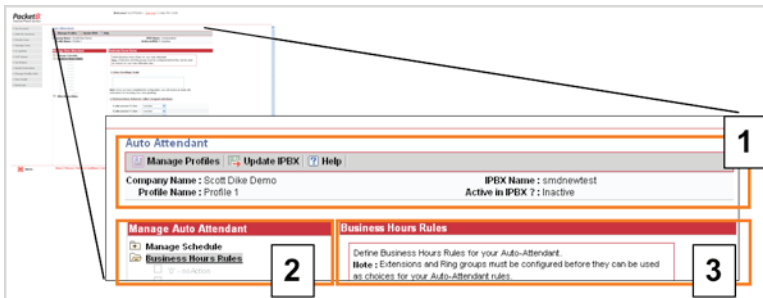


Figure #8

To complete the initial set-up of your AA, you will need to:

1. Define your rules for “Business” and “After Hours” call treatment.
2. Define the rules for “Holidays,” if you elected to set any.
3. Save your changes and click “Update IPBX” to activate.
4. Record your voice greetings and prompts by following the directions sent to you once you have saved your settings.

Detailed instructions for these steps can be found in the “AA Management” section of this guide.

Auto-Attendant Management

After you have completed the initial set-up process, the system will create a Profile for you called "Profile 1." You may find it necessary to change the rules or schedules for your AA from time to time. This is done by logging in to your account management self service portal at <http://www.packet8.net/login>.

From here, you will first be presented with an account summary table, where you will click on "Configure AA." [FIG. 9, #1].

Phone Number	Ext User Name	Ext #	Service Type	IPBX Name	Account Number	Status	Configure	Features	ES11	Call Log	Start Date
1 14086278792		101	IPBX	scottikedemo	P88000000403247	Active	Configure AA				04/11/2007
2		444	Auto Attendant	scottikedemo	P88000000403248	Active	Configure AA				04/11/2007
3		556	Conference Bridge	scottikedemo	P88000000403249	Active	Configure AA				04/11/2007
4		200	Ring Group	scottikedemo	P88000000403250	Active	Configure AA				04/11/2007
5		500	Voice Mail	scottikedemo	P88000000403251	Active	Configure AA				04/11/2007
6 14086278792	Sil.Panunzio DIKE DEMO	101	Unlimited Extension	scottikedemo	P88000000403252	Active	101 Activate	Features	ES11	Call Log	04/11/2007
7 14086278793	Sil.Panunzio DIKE DEMO	102	Unlimited Extension	scottikedemo	P88000000403253	Active	102 Activate	Features	ES11	Call Log	04/11/2007
8 14086278794	Sil.Panunzio DIKE DEMO	103	Unlimited Extension	scottikedemo	P88000000403254	Active	103 Activate	Features	ES11	Call Log	04/11/2007
9		IPBX	IPBX	smidwestest	P88000000403585	Active	Configure AA				04/30/2007
10		444	Auto Attendant	smidwestest	P88000000403586	Active	Configure AA				04/30/2007
11		556	Conference Bridge	smidwestest	P88000000403587	Active	Configure AA				04/30/2007
12		200	Ring Group	smidwestest	P88000000403588	Active	Configure AA				04/30/2007
13		500	Voice Mail	smidwestest	P88000000403589	Active	Configure AA				04/30/2007
14			Virtual Attendant	smidwestest	P88000000403590	Pending Activation	Activate VA				04/30/2007
15		101	Unlimited Extension	smidwestest	P88000000403591	Pending Configuration	Configure 101	Features	ES11	Call Log	04/30/2007

Figure #9

Profile Management

The Auto-Attendant profiles management screen allows you to:

1. Create a new profile.
2. Create a new profile from an existing profile by using the copy feature.
3. Edit an existing profile.
4. Delete an inactive profile.
5. Rename a profile.

Auto Attendant						
Company Name : ScottDikeDemo			IPBX Name : scottikedemo			
Manage Auto Attendant Profiles						
						Create New Profile
	Profile Name	Active in IPBX ?	Date Added	Last Modified Date		
	Profile 1	Active	05/10/2007 12:25PM	05/10/2007 7:08PM	Edit	Copy Delete
	Profile 2	Inactive	05/10/2007 12:45PM	05/10/2007 7:08PM	Edit	Copy Delete

Figure #10

By utilizing additional profiles, you are able to create and test new profiles while maintaining past profiles as back-ups or as seasonal options. If you only require a few changes, try using the copy function to get a head start. This management screen will also display helpful information like the date on which a profile was created, the last date it was modified as well as the current status of a profile. If a profile is marked as ACTIVE, then that profile is currently being used by your AA. You may still edit it, but changes will not be effective until you save and activate those changes. If a profile is INACTIVE, then it is not currently being used by your AA and can only be activated by

choosing **[EDIT]** and then activating from within the AA management workspace for that specific profile.

Auto-Attendant Management Workspace – Navigation

There are 3 key elements to the AA Management Workspace. This Workspace is where you will configure all of the settings for a given profile. These elements are:

1. A Toolbar that gives you quick access to the profile manager, help files, and a tool to upload and activate your settings. It also provides useful information about the system you are currently working on; Company Name, Profile Name, IPBX Name, and the status of the current profile.
2. Auto-Attendant Navigation Tree that allows you to drill down to the specific rules set you wish to modify.
3. Rules Workspaces where you are presented with the configurable options for the rules set you are currently editing.

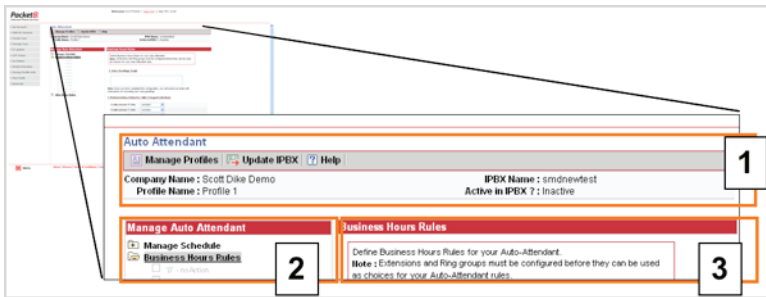


Figure #11

Auto-Attendant Management Workspace – Toolbar

The top section of the toolbar [FIG. 12] has links to tools, while the bottom portion provides information about the current account and profile you are working with.



Figure #12

1. Tools
 - a. **Manage Profiles** – This link will return you to the profile management screen where you can choose another profile to work with or elect to create a new profile.
 - b. **Update IPBX** – This tool is used to update or load your new settings to your system, making it the ACTIVE profile.
 - c. **Help** – A shortcut to useful files and information.
2. Information display
 - a. **Company Name** – This is the name associated with the account you are working within.
 - b. **IPBX Name** – The name of the specific IPBX you are working within.
 - c. **Profile Name** – The name of the Profile you are currently editing.
 - d. **Active in IPBX?** – Indicates the status of the Profile you are currently editing.

Auto-Attendant Management Workspace – Navigation Tree

The navigation tree [FIG. 13] allows you to directly access different sections of the configuration process. You can expand and collapse the folders by clicking on them. Clicking [+] will expand a tree and clicking [-] will collapse a tree. Once a tree is expanded, you may click on the specific item you wish to configure.

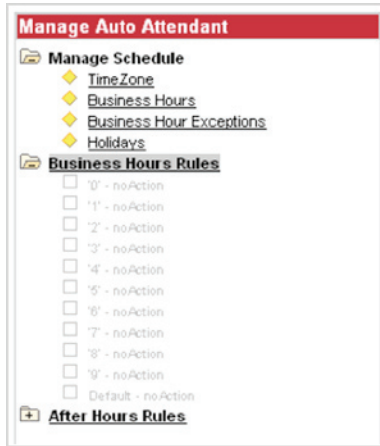


Figure #13

The complete navigation tree is:

1. Manage Schedule
 - a. **Time Zone** – Used to define the time zone for your AA, independent of other extensions within your system.
 - b. **Business Hours** – Define “Business Hours” schedule and rules.
 - c. **Business Hours Exceptions** – Optional settings to temporarily modify your normal schedules.
 - d. **Holidays** – Optional, Pre-define dates for special rules to be used.
2. Business Hours Rules - Define call routing and IVR behavior.
3. After Hours Rules – Define “After Hours” call routing and IVR behavior.
4. Holiday Rules – Only available if a holiday has been defined.

Auto-Attendant Management Workspace – Rules Workspace

The Rules Workspace presents two different types of screens. The first is the schedule screen that allows you to define parameters such as time zone and “Business Hours.” These work spaces are covered in detail under the “Initial Set-up” section of this guide. The second workspace [FIG. 14] screen presents you with options to define your rules for “Business,” “After Hours,” and “Holiday” rules.

1. Voice Greeting Script – Text entered into this field will be included in your instructions for recording your greetings, making it easier to remember which greeting to record for each step. It is highly recommended that you type out the exact script for each greeting you wish to record. You will want to include any instructions to the user for the options you use in Step two. For example, if you want to use the dial-by-name capability, you should include that in your greeting along with the corresponding number so your callers know what

number to press. For example, “Thank you for calling XYZ company, to dial-by-name, please press 4....”

Business Hours Rules

Define the business-hours rules for your Auto-Attendant.
Note: Extensions and Ring groups must be configured before they can be used as choices for your Auto-Attendant rules.

1. Voice Greetings Script

Business Hours Rules

Note: Once you have completed the configuration, you will receive an email with instructions for recording your voice greetings.

2. Perform below Action for Caller's keypad selections

if caller presses '0', then	transferSubMenu	SALES
if caller presses '1', then	dialByName	
if caller presses '2', then	transferExtension	
if caller presses '3', then	noAction	
if caller presses '4', then	noAction	
if caller presses '5', then	noAction	
if caller presses '6', then	noAction	
if caller presses '7', then	noAction	
if caller presses '8', then	noAction	
if caller presses '9', then	noAction	
if no key is pressed, then	noAction	

3. Number of times to replay greetings, if caller takes no action. 2

4. How many seconds should the system wait before each replay? 5

5. Do you want the caller to directly dial by an extension? Yes

Save Settings

Your Auto-Attendant configuration have been changed. To activate these changes, you must click on the **Update IPBX** button in toolbar at the top of your screen.

Figure #14

2. IVR rules – Define how you want your AA to process the call when the caller presses a number on their keypad. The options for this are:
 - a. **Company Directory** – Present the caller with a list of extensions and recorded names.
 - b. **Dial by Extension** – Allows the user to enter an extension number and have the AA transfer them to that extension.
 - c. **Dial by Name** – Allows the caller to use the keypad to enter the first 3 letters of the persons first or last name. They will be presented with a list of possible matches.
 - d. **No Action** – Results in that number key causing no effect.
 - e. **Transfer to Extension** – Assigns an extension to a menu selection.
 - f. **Transfer to Ring Group** – Assigns a Ring Group to a menu selection.
 - g. **Transfer to Sub-menu** – Defines a secondary layer to the IVR. The rules options for this sub-menu will be displayed under the navigation tree. You will be prompted to select a sub-menu or to create a new one.
3. **Replay** – Defines how many times the greeting will be played if the caller takes no action.

Using Sub-Menus

- A sub-menu can have its own set of rules and options for the caller.
- A sub-menu can not have more sub-menus under it
- A sub-menu has a rule option called transfer to previous menu that will return a caller to the previous menu layer

4. Replay delay – Defines how much time should the system wait for the caller to make a selection before playing the next replay.
5. Direct dial – Allows a caller to interrupt a greeting by dialing an extension directly at any time.

Once you have selected values for each of the settings, you must save them by clicking **[SAVE SETTINGS]**. This will save the settings to the profile you are editing.

Please note that these new settings will not take effect until you click the

[UPDATE IPBX] button in the tool bar.

Sample greeting script

Once you have completed the set-up of your AA, you will receive an email with instructions for recording your voice greetings. At a minimum, you will want to record a 'Business Hours' and an 'After Hours' voice greeting. We have provided a sample script to help get you started. Remember, you will need to include instructions for the caller to use any IVR settings you may have set.

Thank you for calling *[COMPANY NAME]*.

If you know your party's extension, please dial it now.

To speak with *[Department 1]*, press **1**

To speak with *[Department 2]*, press **2**

To be transferred to the operator, press **0**

To repeat this menu, press **9**

This script requires that "Dial by Extension" be set to YES and that extensions or ring groups be set for each department. Additionally, 9 is set to "repeat menu" and 0 is set to the extension or ring group used by the receptionist/operator.

Resources

To find the latest user guides and tools for your Packet8 Virtual Office service, please log in to your account at: <http://www.packet8.com/login>.

To access online user documents, go to your main account page and click on “resources” in the menu on the left side of the screen. You may view or download each of the files as reference.

For Customer Service please contact:

By Email:

virtualoffice@packet8.net

By Phone:

Toll free: 1.888.898.8733

Outside of the U.S.: 1.408.727.1885

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