Spectrum▶
BUSINESS

User Guide

Auto Attendant

Introduction

Auto Attendant is a feature of Spectrum Business Voice that automatically answers a call and plays a pre-recorded menu defined by the account administrator. When Auto Attendant is ordered, the TN associated with AA must have voicemail on it. Callers select transfer options by pressing keys on their telephone handset and are directed to the phone line, voicemail box, or other alternative as defined by the Auto Attendant treatment menu. Auto Attendant may be thought of as a virtual receptionist service. One or two instances of Auto Attendant may be purchased for an account; with a second Auto Attendant, an additional menu of options can be created. Each Auto Attendant can have up to 10 selections (using 0 – 9 on the telephone keypad) and a minimum of 2 voice lines is required. Before setting up the Auto Attendant Menu, some pre-planning is recommended.

Common Uses

- To route all inbound calls to lines or Voicemail without manually answering calls.
- Greeting set up to make an organization appear larger and more professional.
- To answer and route inbound calls during specific hours.
- Use in conjunction with Voicemail to provide an option for hours, address or sales specials, etc.
- Auto Attendant is used particularly for companies with 4-5 lines (a minimum of 2 voice lines is needed).

Product Description

Activation and Feature Management

Auto Attendant is activated and managed in the Voice Manager portal.

Business Rules

- Auto Attendant requires a minimum of two voice lines. More than two lines is optimal.

- Auto Attendant cannot retrieve calls and replay the menu once the caller selects a valid menu item. If the caller does not select a valid menu item, the menu will replay until they make a selection or hang up.

- Auto Attendant is an additional menu that is associated with its own voicemail box. This mailbox is solely used for recorded AA greeting and menus. If AA is turned on the caller will hear the recorded AA greeting and menus. If AA is turned off the caller will hear the personal greeting associated with the voicemail box on the number that was dialed. Utilizing the "Transfer to Current Mailbox" option will direct calls to the voicemail box on the number that was just dialed.
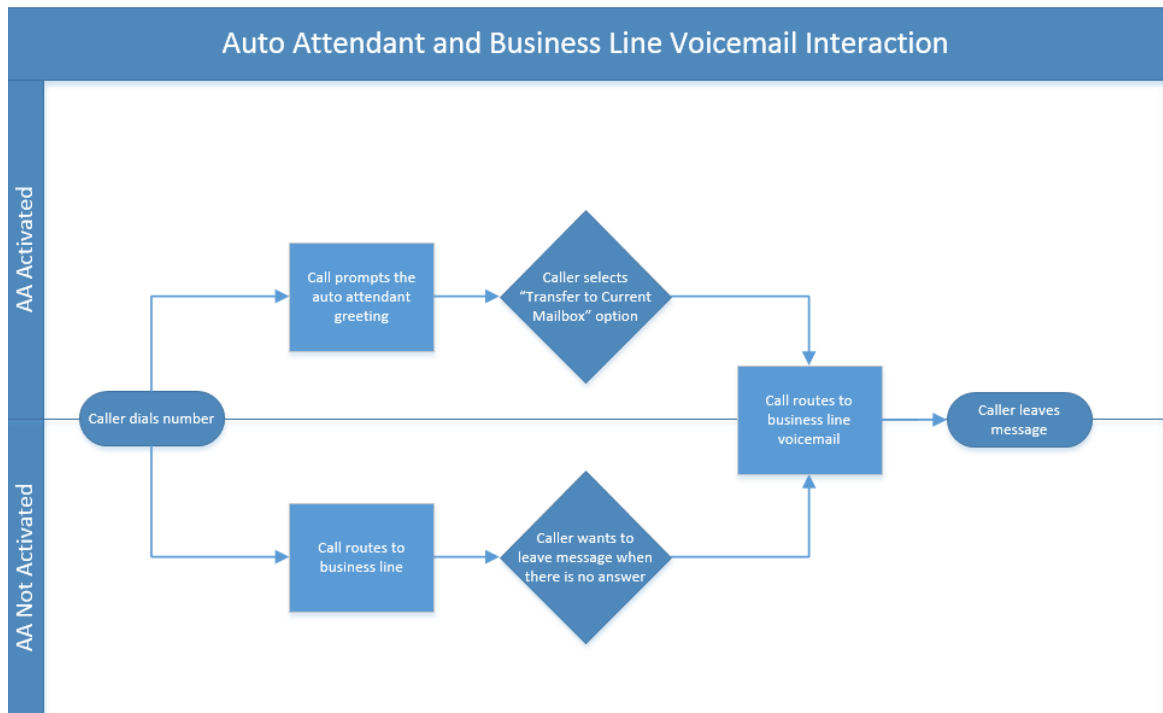
- Ensure that a greeting name is recorded for each voicemail box. (e.g. One for each AA instance)

- Test the Auto Attendant configuration when set-up is complete.

- Auto Attendant cannot connect to outside lines such as cell phones or outside phone numbers; except in the case where a business voice line on the account has been independently forwarded leveraging standard call forwarding features.
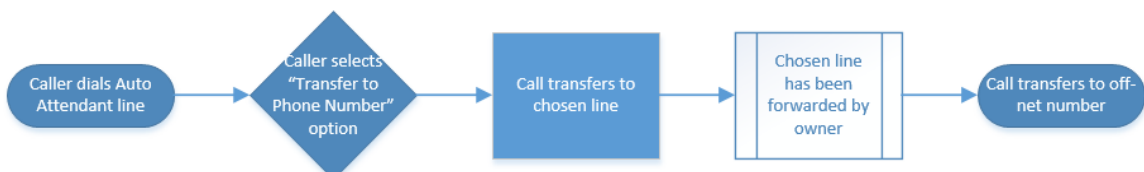
- The following features take precedence over Auto Attendant:
  - Intercept Message
  - Outbound Call Blocking (only International, 900/976, Collect, DA)

- Selective Call Rejection (applicable to inbound numbers added to call rejection list)
- Anonymous Call Rejection
- All Call Forwarding features (applicable to the business line associated to AA)
- Do Not Disturb
- Call Waiting Tones
- Hunt Group (pilot)
- Hunt Group Members (not pilot)
- Simultaneous Ringing
- Sequential Ringing
- Call Waiting
- Call Forwarding Busy
- Call Forwarding No Answer
- Call Forward to Voicemail and Auto Attendant

Menu Options

- **Transfer to Phone Number** - Transfer to a phone # for a specific person or department. (E.g. ring to line 3, 4, 5, etc.)
- **Transfer to Mailbox** - Transfer directly to a person or department's voicemail. (E.g. send to voicemail for line 3, 4, 5, etc.)
- **Transfer to Current Mailbox** - Transfer directly to the Auto Attendant line voicemail box
- **Dial by Extension** - Transfer to a person or department by entering their extension. Done at provisioning with Business Group option in which, extension defaults to last 4 digits of phone number
- **Dial by Name** - Transfer to a person or department by entering their last name or department name manually on their dial pad. Names and numbers need to be added in Voice Manager Portal beforehand

* If you want to provide a second menu with other options, write "transfer to phone #" and write the second Auto Attendant's phone number. When using two menus, it's a good practice to leave room to refer back to the original Auto Attendant # on the second menu.

Setup

Step One: Setup the Menu Tree in Voice Manager

Administrators can configure and update Auto Attendant real time from any internet connection using the Voice Manager portal. Here they can establish the menu options and their destination phone numbers:

- Log into https://www.spectrumbusiness.net/#/login as an administrator.
- Navigate to Voice Manager.
- From the Global Call Settings page, click on the Custom Routing tab.

- Click the blue arrow to the right of the Auto Attendant

- Set the option for turning on Auto Attendant by clicking the radio button for "Always" or "Only at Specific Times".
- Select the number of rings (Rings Before Answer) callers will hear before the Auto Attendant answers.

- In the Name Directory, assign names to lines.
- In the Menu Tree, select the action that you want the Auto Attendant to perform when the number is selected by the caller.
  - Auto Attendant has 10 selection choices (i.e., press 0, press 1, … press 9). Each selection can be one of the following:
    - Transfer to Phone Number - Connect to another Spectrum Business Voice line, including Hunt Groups,
    - Transfer to Mailbox - Connect to a voicemail box associated with a line
    - Transfer to Current Mailbox - Connect to the general voicemail box that comes with Auto Attendant
    - Dial by Name Directory - Connect to dial by name directory
    - Dial by Extension - Connect to dial by extension
- For Transfer to Phone Number and Transfer to Mailbox, choose the phone number from the drop-down list.
- For Dial by Name, complete the Dial by Name Directory entries by clicking Edit and adding numbers to the member list.
- When finished select "SAVE."

- Ensure that the Auto Attendant is "Enabled" at the top of the page.

Step Two: Record the Auto Attendant Menu Greetings

There are two steps to record the greetings your callers will hear:

- Initialize the voicemail box that comes with Auto Attendant. Follow the steps below:
  - There are three ways to access the voicemail system:
    - From the Spectrum Business Voice line that the Auto Attendant is on, call the Spectrum Business Voice number of that line.
    - From the Spectrum Business Voice line that the Auto Attendant is on, dial *98.
    - Call the local Spectrum Business Voice dial-up number from the list and put in the number of the Spectrum Business Voice line that will use Auto Attendant to play a prompt. Then, "Enter your 4 digit PIN," which is the last 4 digits of the phone number.
  - Follow the prompts to change your PIN.
  - Create a "Name" recording (e.g., "General Mailbox").

- o Create an "All Calls" greeting (the greeting that will be played when the caller reaches your voicemail).
- Record the "specialized greeting" (the Auto Attendant greeting). This is the main Auto Attendant greeting (e.g., "Thank you for calling Smith Accounting. Please press 1 to connect to Mr. Smith. Please press 2 to connect to Mr. Jones. To leave a general voicemail message, please press 3.").
  - o Follow the steps below:
    - ▪ There are three ways to access the voicemail system:
      - From the Spectrum Business Voice line that the Auto Attendant is on, call the Spectrum Business Voice number of that line.
      - From the Spectrum Business Voice line that the Auto Attendant is on, dial *98.
      - Call the local Spectrum Business Voice dial-up number from the list and put in the number of the Spectrum Business Voice line that will use Auto Attendant to play a prompt. Then, "Enter your 4 digit PIN," which is the last 4 digits of the phone number.
    - ▪ Press #, if prompted, to indicate you are dialing from your Spectrum Business Voice, or if you dialed the access number press *5 and enter the Spectrum Business Voice telephone number followed by #.
    - ▪ Press 3 to administer greetings.
    - ▪ Press 7 to work with specialized greetings.
    - ▪ Press 3 to work with the Auto Attendant greeting.
    - ▪ Press 1 to record the greeting, then record the greeting and press # when finished.
    - ▪ Press 1 to hear your greeting, press 2 to accept and use the greeting, or press 3 to re-record the greeting if you prefer.
- There is not an option to upload IVR recordings

Recording Names Associated with Auto Attendant

When the platform transfers a call to a specific phone number, the caller will hear "transferring to [name] or [telephone number]" while the transfer is in progress. The system will play the Name recorded by the voicemail box on that line if available or speak the full 10-digit telephone number if no name has been recorded or no mailbox is associated with the line.

If no mailbox is associated with the line, a name can still be recorded, if desired, by following the steps to initialize a voice mailbox. Although the system asks to record a greeting, this greeting will not be heard if voicemail has not been purchased for the Spectrum Business Voice line.

The recorded name is possible because every line on an account with Auto Attendant has a 'stub' voice mailbox built behind it. A stub mailbox is one with zero storage and the ability to leave messages disabled. If the customer adds voicemail to the line, the stub mailbox is removed and replaced with a new mailbox (i.e., it will require a repeat of the first time set-up process).

After setting up the default greeting, you will be prompted to set up the remaining greetings. There is always the ability to re-record.

A user may want keep a record of what you set up. Many people find it helpful to write down what they want callers to hear for each option before they record.

Clarifications

- Auto Attendant allows you to record a custom greeting and menu with up to 10 options (0- 9) for callers to self-direct their calls

- Callers can be connected to the following: another Spectrum Business Voice line (on the same account), a voicemail box associated with a Spectrum Business Voice line or the Call By Name Directory

- Callers CANNOT connect to outside lines except in the case where the transfer number chosen has been independently forwarded

- Auto Attendant needs to be pointed to one Spectrum Business Voice line. Traditionally this is customer's main number

- Auto Attendant requires a minimum of two lines

- Auto Attendant can be set to answer from 1-10 rings via the Voice Portal

- Auto Attendant can be configured to turn on at specific times via the Voice Portal

- Once a caller has selected an option off of the Auto Attendant greeting the call cannot reconnect back to the main Auto Attendant greeting

- A "nested" Auto Attendant is when one menu choice leads to another menu. This is accomplished by nesting the second AA as "Transfer to Phone Number" option.

- If two Auto Attendants are utilized, they can be setup to toggle between the two menus.

Examples of Auto Attendant with 2 Voice Lines

2 Voice Lines 1 Auto Attendant

Auto Attendant Main For
(830

Auto Attendant Main For (830- ENABLED

Auto Attendant answers your Business Class Phone automatically and plays a customized
hear information about your business, dial by name or number or be directed to a Voicemai

Click here to read more about setting up Auto Attendant.

Turn on Auto Attendant: ⦿ Always ◯ Only at specific times

Rings Before Answer: 9 ▼

First, set up your **Name Directory** to assign a name to each phone line you want accessibl
incoming callers to dial by name, dial by extension or transfer to a phone line or Voicemail t
Possible exclusions include fax lines, alarm lines, or Point of Sale lines.

MENU TREE

Menu Option	Action	
Press 0	Transfer to Current Mailbox ▼	
Press 1	Transfer to Mailbox ▼	830 ▼
Press 2	Transfer to Phone Number ▼	830 ▼
Press 3	Dial by Name Directory ▼	Edit
Press 4	Dial by Extension ▼	
Press 5	No Action ▼	
Press 6	No Action ▼	
Press 7	No Action ▼	
Press 8	No Action ▼	
Press 9	No Action ▼	

2 Voice Lines 2 Auto Attendants

Auto Attendant Main For (830-_____)

Auto Attendant Main For (830-_____)   ENABLED

Auto Attendant answers your Business Class Phone automatically and plays a customized hear information about your business, dial by name or number or be directed to a Voicemai

Click here to read more about setting up Auto Attendant.

Turn on Auto Attendant: ⦿ Always ○ Only at specific times

Rings Before Answer: 9 ▾

First, set up your **Name Directory** to assign a name to each phone line you want access incoming callers to dial by name, dial by extension or transfer to a phone line or Voicemail Possible exclusions include fax lines, alarm lines, or Point of Sale lines.

MENU TREE

Menu Option	Action	
Press 0	Transfer to Current Mailbox ▾	
Press 1	Transfer to Mailbox ▾	830-_____ ▾
Press 2	Transfer to Phone Number ▾	830-_____ ▾
Press 3	Dial by Name Directory ▾	Edit
Press 4	Dial by Extension ▾	
Press 5	No Action ▾	
Press 6	No Action ▾	
Press 7	No Action ▾	
Press 8	No Action ▾	
Press 9	No Action ▾	

Auto Attendant Alternate For (830-_____)

Auto Attendant Alternate For (830-_____)   ENABLED

Auto Attendant answers your Business Class Phone automatically and plays a customized hear information about your business, dial by name or number or be directed to a Voicema

Click here to read more about setting up Auto Attendant.

Turn on Auto Attendant: ○ Always ⦿ Only at specific times

From 05:30 AM ▾ To 02:30 PM ▾   ☑ Sun ☑ Mon ☑ Tue ☐ Wed

Rings Before Answer: 5 ▾

First, set up your **Name Directory** to assign a name to each phone line you want accessib incoming callers to dial by name, dial by extension or transfer to a phone line or Voicemail Possible exclusions include fax lines, alarm lines, or Point of Sale lines.

MENU TREE

Menu Option	Action	
Press 0	Transfer to Current Mailbox ▾	
Press 1	Transfer to Phone Number ▾	830-_____ ▾
Press 2	Transfer to Mailbox ▾	830-_____ ▾
Press 3	Dial by Name Directory ▾	Edit
Press 4	Dial by Extension ▾	
Press 5	No Action ▾	
Press 6	No Action ▾	
Press 7	No Action ▾	
Press 8	No Action ▾	
Press 9	No Action ▾	

* Please note that the lines listed as "No Action" can be assigned any of 5 options but doing so, in this scenario, would be redundant.

Appendix

Spectrum BUSINESS

Auto Attendant Planning Worksheet

Purpose

This planning worksheet is designed to help you create your Auto Attendant menu.

Overview

Auto Attendant is a feature of Spectrum Business Voice that automatically answers a call and plays a pre-recorded menu defined by the account administrator. Callers select transfer options by pressing keys on their telephone handset and are directed to the phone line, voicemail box, or other alternative as defined by the Auto Attendant treatment menu. Auto Attendant may be thought of as a virtual receptionist service. One or two instances of Auto Attendant can be activated for an account; with a second Auto Attendant, an additional menu of options can be created. Each Auto Attendant can have up to 10 selections (using 0-9 on the telephone keypad). Before setting up the Auto Attendant Menu, some pre-planning is recommended.

A. Self-Assessment

1. Do I want my Auto Attendant to play at all times or only between specific times?
   _____

   a. If you answered question 1 with specific times, specify between what hours you want Auto Attendant to play from _____:_____ (AM/PM) to _____:_____ (AM/PM)

2. How many rings do I want the caller to hear before hearing the Auto Attendant menu? _____
   ie: 0,1,2,3,....29,30
   * If you want the menu to play automatically answer "0"

3. Will I need to give the caller more than ten options to choose from? **(YES/NO)**

4. Will I need a second menu if a caller picks an option from the first menu? **(YES/NO)**
   i.e. "press 1 for sales".....second menu says "press 1 for residential sales, press 2 for commercial sales"
   * If you answered yes to questions 3 or 4 you will need to purchase a second Auto Attendant

B. What options do you want callers to have?

In this section you will make a list of whether you want to give callers the option to:

- Transfer to a phone # for a specific department (write the department's name and number)
- Transfer to a phone # for a specific person by pressing a number (write the person's real name and number in your list)
- Transfer to a person or department by entering their extension
- Transfer to a person or department by entering their last name or department name manually on their dial pad (referred to as "Dial by Name Directory" on your account)
- Transfer directly to a person or department's voicemail
- Transfer directly to the Auto Attendant line voicemail box (referred to as "transfer to current mailbox #").
- If you want to provide a second menu with other options, write "transfer to phone #" and write the second Auto Attendant's phone number. When using two menus, it's a good practice to leave room to refer back to the original Auto Attendant # on the second menu.

An Example:

1. Allow caller to enter the party's last name manually
2. Sales Department 555-555-5555
3. Customer Service 555-611-5433
4. John Doe 555-412-5545

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____

* If you have more than 9 items, you will need to purchase a second Auto Attendant

C. Create Your Member List

In this section you will create a member list to be used in the **Dial by Name** directory feature, **Dial by Extension** feature, and to transfer calls to a phone line directly.

1) Write each person's first name, last name and their phone number on a sheet of paper or excel spreadsheet.

2) Also, if you want callers to be able to transfer to a department, include the departments' names and numbers in your member list.

** If you are including a department name in your member list you must enter the department's name **in both the first and last name fields**.*

First Name/ Dept. (optional)　　Last Name/ Dept. (optional)　　Phone Number

1. _____　　_____　　_____

2. _____   _____   _____

3. _____   _____   _____

4. _____   _____   _____

5. _____   _____   _____

6. _____   _____   _____

7. _____   _____   _____

8. _____   _____   _____

D. Record your greeting

1) Write or type out your greeting

2) Pick up the phone handset associated with the Auto Attendant line

3) Dial your voicemail access number (local access number), your Spectrum Business Voice number or *98

4) Press the following keys in order **3,0,7,3** to record your greeting

A sample greeting:

"Hello you have reached (**Company's Name**).

If you know your party's extension, please press **1**.

If you know your party's last name or the name of the department you wish to dial, please press **2**.

If you would like to speak with John Doe, please press **3**.

If you would like to speak with Jane Doe, please press **4**.

If you would like to be transferred to Sales, please press **5**.

If you would like to leave a message for Cindy Smith, please press **6**.

If you would like to leave a general inquiry for our sales staff, please press **7** now.

E. Final Checklist (This is the final step before saving and submitting online)

1. Is call forwarding for the Auto Attendant line in the "on" position? **(YES/NO)**

2. Is call forwarding for the Auto Attendant line set to forward to Voicemail? **(YES/NO)**

3. Is Auto Attendant for the phone line turned "on"? **(YES/NO)**

4. Have I recorded my Auto Attendant greeting? **(YES/NO)**

If **YES**, your Auto Attendant is ready to go! If you need assistance at any time, please call our Voice Manager consultants at **1-866-441-2775**.