

AUTOMATED ATTENDANT
REFERENCE GUIDE



G R E A T P L A I N S
C O M M U N I C A T I O N S

TABLE OF **CONTENTS**

Quick Reference Guide	3
Directory	4
Schedules	5
Menus	6
Submenus	7
Options	8
Mailbox Greetings	8
Mailbox Notifications	9
Call Announce	10

AUTOMATED ATTENDANT | QUICK REFERENCE GUIDE

Open a web browser and enter the service's address from KBS Admin Provision/Profile Location for the Virtual Receptionist Portal or Edit the Automated Attendant from KBS Admin Provision/Subscribers and click MSG PORTAL on the action menu.

You can quickly access your active schedule, messages and emergency override from the options on the left side of the home page.

Follow the Setup tabs provided to set up your service in three easy steps. Select each and follow the instructions provided on each page.

Quick links are provided to easily access Messages, Notification settings and Greetings.

Organizations can use this Quick Reference Guide to create an automated answering point for a specific department or the entire organization. Callers will be answered by a personalized greeting (recorded by you) and offered a menu of options ("Press 1 for Service", "Press 2 for Sales", etc.) to route themselves to the appropriate department or individual. The system offers the option to configure different greeting and routing options based on the day of the week and time of day. Special options can also be defined for holidays or closures.

AUTOMATED ATTENDANT | DIRECTORY

1 DIRECTORY SETUP

Navigate to the Directory tab using the Directory Setup link on the home page or by selecting the Directory tab from the top navigation bar.

Select Add Entry to manually input employees.

Choose how callers can search for employees.

Select the Import tab to easily add many employees to the dial by name directory at once - the menu will guide you through uploading a file.

Import entries into your Directory from a .csv (comma-separated values) file.

File containing the entries: No file chosen

- Overwrite duplicates in Directory with imported items (keep the new ones)
- Do not overwrite duplicates in Directory (keep the old ones)
- Add all imported items to Directory - without affecting any existing entries
- Replace entire Directory with imported items

Click the Export button to export all of your Directory entries to a .csv (comma-separated values) file.

Directory : All

Name (last, first)	Name recording	Extension	Action	Email address
Stewart, nick	<input type="button" value="RECORD"/>			

To export the Directory, select the Directory tab and follow the instructions.

AUTOMATED ATTENDANT | SCHEDULES

2 SCHEDULES SETUP

Navigate to the Schedules tab by using the Schedule Setup link or by selecting the Schedule tab from the top navigation bar.

Select the In Hours tab to set up schedules for business operating hours.

Enter business hours for each day via the drop-down menus. Select Update when complete.

AUTOMATED ATTENDANT

Home Directory **Schedules** Menus GPC AA (531) 721-2999 My Account Logout

In Hours **Holiday**

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

Monday	Open from 8	:00 AM
Tuesday	Open from 8	:00 AM
Wednesday	Open from 8	:00 AM
Thursday	Open from 8	:00 AM
Friday	Open from 8	:00 AM
Saturday	Closed all day	
Sunday	Closed all day	

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

Update Cancel

AUTOMATED ATTENDANT

Home Directory **Schedules** Menus GPC AA (531) 721-2999 My Account Logout

In Hours **Holiday**

This is your holiday schedule. On the selected dates, your Holiday greeting will be played instead of your normally scheduled greeting. Add or remove dates from your list of Holidays. You can have up to 20 dates in your list.

1 of 20 Dates

October 11 Date Start date to End date Add

Remove from list

Update Cancel

To provide a Holiday greeting, select the Holiday tab, enter dates and click the Add button.

To remove, highlight a date and click the Remove from list button.

AUTOMATED ATTENDANT | MENUS

3 MENU SETUP

Navigate to the Menus tab using the Menus link on the home page or by selecting the Directory tab from the top navigation bar.

Set up the business hours menu by navigating to the In Hours tab on the top navigation bar and entering the extension name.

Select call routing options for each extension by added by selecting a call treatment option from the drop-down box.

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

In Hours Greeting: RECORD

Ext.	Name	
1	Sales	None
2		None
3		None
4		None
5		None
6		None
7		None
8		None
9		None
0		None

[Print this page for your records](#)

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

In Hours Greeting: RECORD

Ext.	Name		Ring: 30 secs	No Answer:	
1	Sales	Dial Number		Disconnect	UPDATE CANCEL
2		None		Disconnect	
3		None		Go to Voicemail	
4		None		Go to Account	
5		None		Repeat Greeting	
6		None			
7		None			
8		None			
9		None			
0		None			

[Print this page for your records](#)

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

In Hours Greeting: RECORD

Ext.	Name	by:	among:	
1	Sales	Hunt	1	2
2		None	3	4
3		None		
4		None		
5		None		

[Print this page for your records](#)

Depending on the options selected, you may be prompted for call routing details. Select options from the drop-down menus and/or enter appropriate telephone number as prompted.

Select Update to save your selections.

Optional call treatments provided.

A variety of call hunting options are available and can be specifically set up according to your business's needs.

AUTOMATED ATTENDANT | SUBMENUS

Navigate to the Submenus tab by selecting Menus from the top navigation bar.

Greetings can be recorded for each submenu.

Set up an In Hours menu by navigating to the In Hours tab on the top navigation bar and entering the extension name.

The screenshot shows the 'Automated Attendant' interface. At the top, there's a navigation bar with 'Home', 'Directory', 'Schedules', and 'Menu'. Below it, a sub-navigation bar has 'In Hours', 'Out of Hours', 'Holiday', and 'Submenus' (with sub-items 1-7). The main content area has a header 'To set up the menu, first record the Submenu 2 Greeting and then set up the extensions.' Below this is a 'Submenu 2 Greeting' field with a 'RECORD' button. A table follows with columns 'Ext.' and 'Name'. The table contains 10 rows, each with an extension number (1-0) and the word 'None'. At the bottom, there is a link 'Print this page for your records'.

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

Each menu can have up to seven submenus. Each submenu and extensions are updated using the same prompts and settings available at the menu level.

Submenus are a good option if an organization has large numbers of potential routing options. Typically it's good practice to limit the main menu to no more than five choices. Instead, use submenus to offer additional routing options.

AUTOMATED ATTENDANT | OPTIONS

MAILBOX GREETINGS

Navigate to the Mailbox Greeting tab by using the Greetings link on the home page or by selecting the Options tab from the top navigation bar. Next, select Mailbox Greeting and click the Change button. You can also record a greeting by clicking the Record button on the In Hours tab.

The screenshot shows the 'AUTOMATED ATTENDANT' interface. The top navigation bar includes 'Home', 'Setup', 'Messages', and 'Options'. The 'Options' tab is active, and the 'Mailbox Greeting' sub-tab is selected. The main content area displays a 'Custom Greeting' section with a 'CHANGE' button and a play button. Below this, the 'Edit Voicemail Greeting' wizard is open, showing three options: 'Import a Sound', 'Record Your Own', and 'Select Standard'. The 'Import a Sound' option is selected, and the 'Choose File' button is highlighted. The 'Record Your Own' option is also visible, with a 'Call Me' button next to a phone number input field.

An Edit Voicemail Greeting wizard will guide you through recording a greeting or uploading a pre-recorded file.

To upload a pre-recorded greeting, select the Choose File button and hit OK to save.

To record a mailbox greeting, enter the phone number where you would like the system to reach you.

Select Call Me to have the system call you to record a greeting.

Once you have recorded your greeting, press the # key to save the recording.

A common mailbox is assigned to each automated attendant so callers have the option to leave a message if no one is available. Add a personal greeting so callers know what department or team they have reached and when they can expect their call to be returned.

AUTOMATED ATTENDANT | OPTIONS

MAILBOX NOTIFICATIONS

Navigate to the Options tab and select the Notifications option.

Select how you would like to be notified by checking the appropriate box and entering your email address and/or phone number.

AUTOMATED ATTENDANT

Home Setup Messages **Options** GPC AA (531) 721-2999 | My Account | Logout

Notifications **Mailbox Greeting** Call Announce

We can notify you with an email or a phone call when a message is left in your mailbox.

Email e.g. you@your_isp.com - separate multiple addresses with a comma or spaces

Phone Enter your phone number

Check the days of the week and the times during which you want to be notified by phone.

Days S M T W T F S

Times All Day 12 :00 am and 12 :00 am

Select when you would like to be notified by checking the appropriate Days boxes and entering the time of day using the scheduling tools provided. Click Update to save.

It is good practice to set up notifications for the general mailbox. This ensures that any messages left are handled promptly. It may be helpful to create an email group in order to notify multiple employees simultaneously.

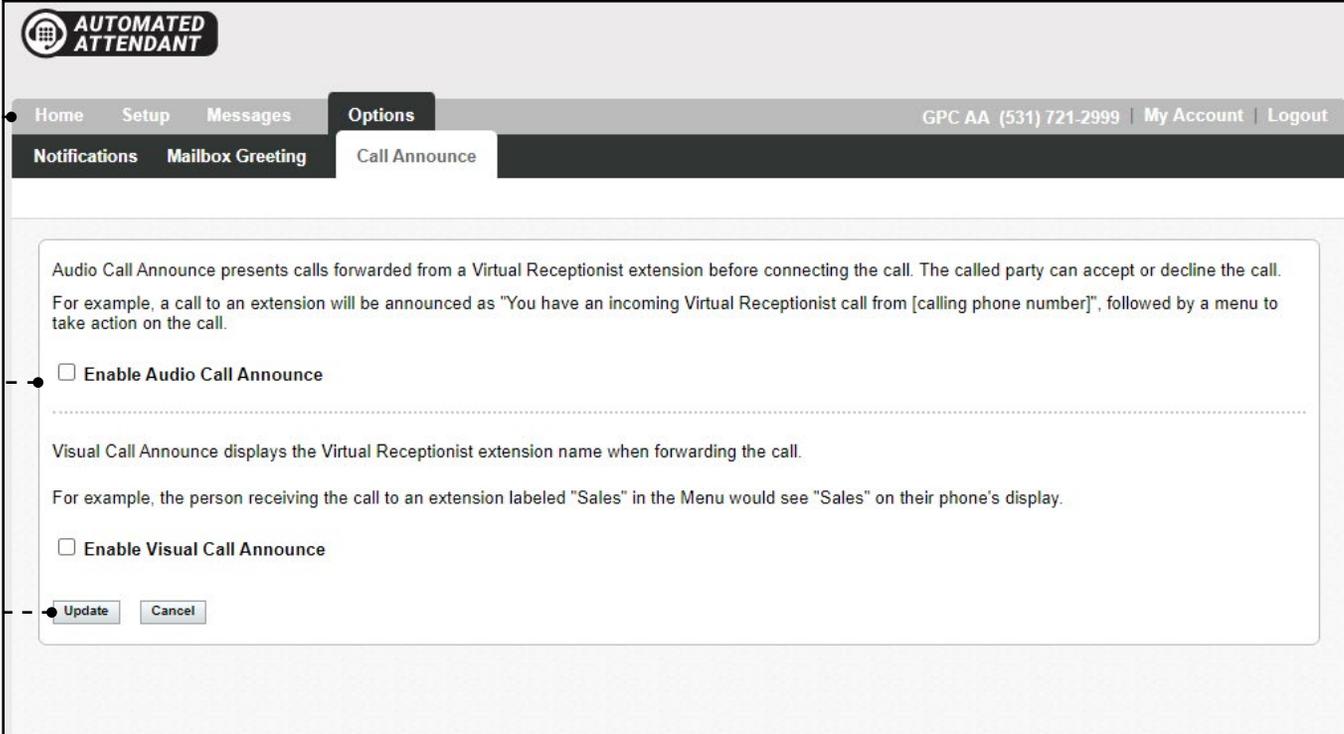
AUTOMATED ATTENDANT | OPTIONS

CALL ANNOUNCE

Navigate to the Options tab and select the Call Announce option.

Select how you would like to receive call announcements by checking the appropriate box.

Once complete, click Update to save your settings.



The screenshot shows the 'AUTOMATED ATTENDANT' interface. At the top, there is a navigation bar with tabs for 'Home', 'Setup', 'Messages', 'Options', 'Notifications', 'Mailbox Greeting', and 'Call Announce'. The 'Options' tab is selected, and the 'Call Announce' sub-tab is active. The main content area contains the following text and controls:

Audio Call Announce presents calls forwarded from a Virtual Receptionist extension before connecting the call. The called party can accept or decline the call. For example, a call to an extension will be announced as "You have an incoming Virtual Receptionist call from [calling phone number]", followed by a menu to take action on the call.

Enable Audio Call Announce

Visual Call Announce displays the Virtual Receptionist extension name when forwarding the call. For example, the person receiving the call to an extension labeled "Sales" in the Menu would see "Sales" on their phone's display.

Enable Visual Call Announce

At the bottom, there are two buttons: 'Update' and 'Cancel'.