

Specify the *Start Time* and *End Time* for the event, and then choose one of the following actions; Greeting, Route To, or Dial By Name. The fields to the right of the *Action* selection box will change depending on the type of action that is selected. If a Greeting action is selected, then a greeting audio file must also be selected. If a Route To action is selected, then a 10-digit Mailbox number must be entered. If a Dial By Name action is selected, then a Dial By

Name Group and a greeting audio file must be selected. Press the *Add* button once all of the settings have been completed and the new event entry will appear in the *Events* section.

To modify or delete an existing event, click on the event's column in the *Events* section. It will begin flashing and the details of the selected event will be displayed in the fields at the bottom of the window. Change the fields to their new values and press the *Save* button that is located below the *Action* field on the left-hand side of the window or press the *Delete* button that is located below the *Action* field to remove the event, once completed click *Save* in the bottom right.

### Specific Caller Actions

The *Specific Callers* section is used to configure actions to be performed when calls from specific phone numbers are received. Click on *Specific Callers*, enter a 10-digit calling number into the *Address* field, enter a short description of the caller into the *Description* field, and then choose one of the following actions: Greeting, Route To, or Dial By Name. The fields to the right of the *Action* selection box will change depending on the type of action that is selected. If a Greeting action is selected, then a greeting audio file must also be selected. If a Route To action is selected, then a 10-digit Mailbox number must be entered. If a Dial By Name action is selected, then a Dial By Name

Group and a greeting audio file must be selected. Press the *Add* button once all of the settings have been completed and the new specific caller entry will appear in the list.

To modify or delete an existing specific caller entry, click on the entry in the list of specific callers and the details of the selected entry will be displayed in the fields below the list. Change the fields to their new values and press the *Save* button that is located below the *Action* field on the left-hand side of the window or click on the entry in the list of specific callers and press the *Delete* button that is located below the *Action* field to remove the entry. Click on *Save* in the bottom right of the window once the modifications have been made.



# Solarus®

## AUTO ATTENDANT WEB PORTAL USER GUIDE

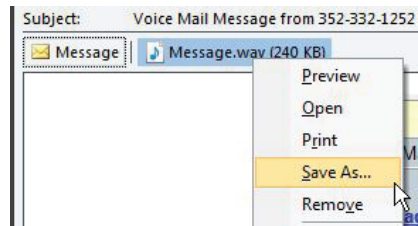
Talk With Us®

## PROFESSIONAL PHONE TRAFFIC ROUTING

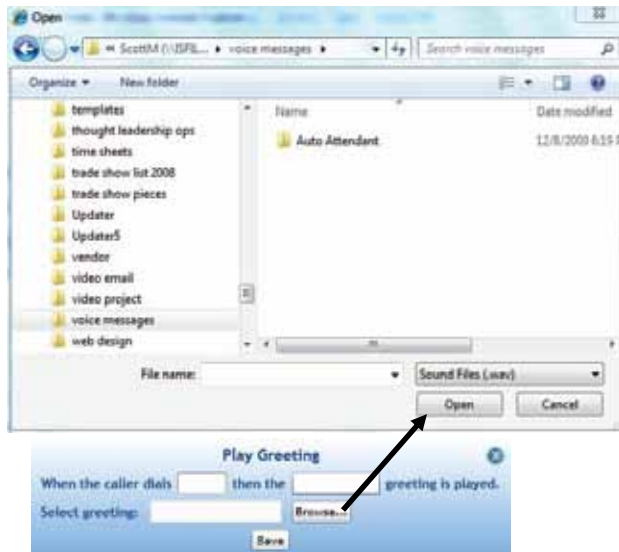
The Auto Attendant service allows you an efficient way to handle your incoming calls and getting them routed to the staff member that your customers want to speak with. This guide will give you step by step instructions on creating a custom Auto Attendant to specifically meet the needs of your business.

## HOW TO RECORD YOUR GREETINGS

The easiest way to record greetings to use in your Auto Attendant service is to call the message transfer center at 715-423-6699 or 800-928-2867. When prompted, enter your phone number including area code, this will connect you to your mailbox where you can record the greetings you plan to use for your auto attendant. Each specific greeting that you record will then be e-mailed to you. Please contact 888-676-8638 if you are not receiving the messages in your e-mail account. Once you have received your e-mail, right click on the attachment and select *Save As* to save the message to your computer.

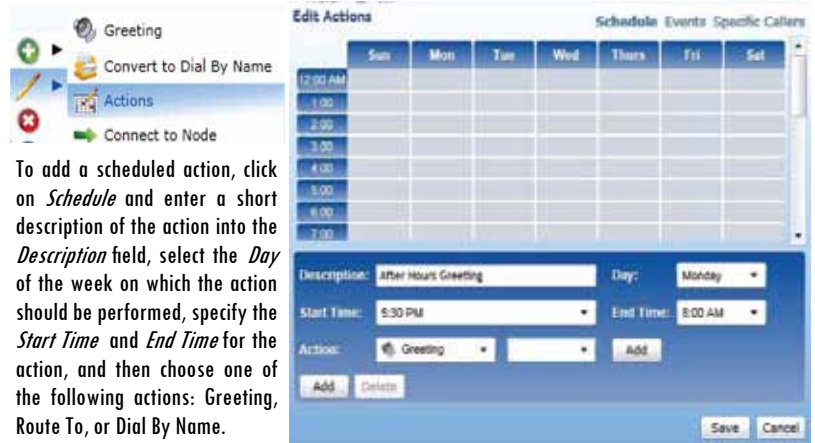


It is suggested that you name your folder Auto Attendant and then assign a specific file name for each greeting. This action will make it easier for you find the correct greeting when clicking on Browse to add a greeting your Auto Attendant.



## Actions

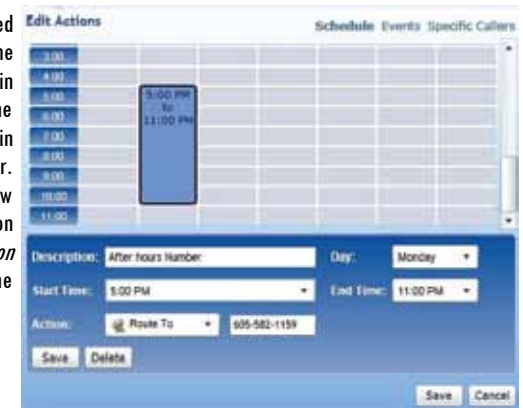
The Actions option can be used by greeting nodes in the Auto Attendant to manage actions that can be performed for specific schedules, events, and callers. The Actions window can be accessed by hovering over a greeting node, selecting the Yellow Pencil and then click on the Actions icon.



To add a scheduled action, click on *Schedule* and enter a short description of the action into the *Description* field, select the *Day* of the week on which the action should be performed, specify the *Start Time* and *End Time* for the action, and then choose one of the following actions: Greeting, Route To, or Dial By Name.

The fields to the right of the *Action* selection box will change depending on the type of action that is selected. If a Greeting action is selected, then a greeting audio file must also be selected. If a Route To action is selected, then a 10-digit Mailbox number must be entered. If a Dial By Name action is selected, then a Dial By Name Group and a greeting audio file must be selected. Press the *Add* button once all of the settings have been completed and the new schedule entry will appear in the weekly calendar.

To modify an existing scheduled action, click on the action in the weekly calendar. It will begin flashing and the details of the selected action will be displayed in the fields below the calendar. Change the fields to their new values and press the *Save* button that is located below the *Action* field on the left-hand side of the window.



To delete a scheduled action, click on the action in the weekly calendar. It will begin flashing and the details of the selected action will be displayed in the fields below the calendar. Press the *Delete* button that is located below the *Action* field to remove the scheduled action from the weekly calendar.

## Event Actions (see events window on the next page)

The Events window is used to define actions to be performed on specific days of the year, such as holidays. To add an event action, click on *Events* and enter a short description of the action into the *Description* field, select the *Month* and *Day* on which the event will occur.

## SPECIAL OPTIONS

The following options give added enhancement to your Auto Attendant beyond the basic set up features of the service.

### Listening to your Recorded Greetings

Hover over any of the speaker icons in your Auto Attendant and select the Green Play button. An audio player will open allowing you to listen to the greeting associated with that specific Node of the service.



### Connect to a Node

Use Connect to a Node to give callers the option of going to another Mailbox, Greeting, Called Number or Dial by Name in your Auto Attendant. To create this option hover over any speaker icon in your Auto Attendant, click on the Yellow Pencil and then select *Connect to Node*. A Connect to Node box will open and you can then type in the corresponding number (#) recorded in your greeting that when pressed by the caller will route them to a specific node in your Auto Attendant. Click on the drop down to see a list of node options which you can choose to route the caller; after you have made your selection, click on *Save* to complete the entry.



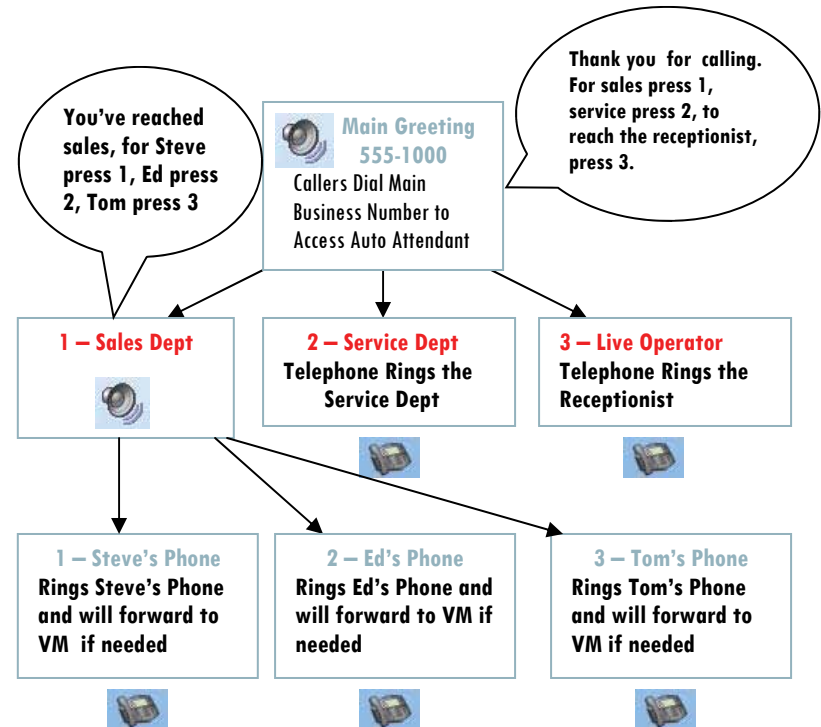
### Dial by Name

Your Auto Attendant service gives you the option of letting callers Dial by Name to be connected to a phone number. Dial by Name will give a caller the option of using their phone pad to enter the first 3 digits of the person's last name in order to be connected to their phone number. To access this option, hover over the appropriate speaker icon where you want the Dial by Name directory and click on the *Green +* icon, then select *Dial by Name*. This action will open a Dial by Name box where you will see your Dial by Name Group(s) that have been set up in advance by customer support. If you have more than one, select the appropriate group for this Dial by Name directory and then choose either the default greeting telling caller to enter the first 3 digits of the person last name, or click on *Browse* to insert your own greeting. Click on *Save* to complete the entry. Contact xxx-xxxx if you haven't provided us your Dial by Name Directory Groups.



## CREATING YOUR AUTO ATTENDANT

To give you an idea of how you may want to set up your own Auto Attendant service, the following diagram shows how the service may be set up for a small business.



## USING THE WEB PORTAL TO SET UP AUTO ATTENDANT

### Auto Attendant Flow Map

The Web Portal is a way for you to administer this service and to visually see how callers will be routed through your Auto Attendant. As you start building your Auto Attendant, you can reposition the call flow display by moving the mouse cursor onto the icon to be moved. Press down and hold down the left-hand mouse button then drag the icon to a new position by moving the mouse in the desired direction. When the icon is in the desired position, release the left-hand mouse button. Any connection lines between icons will be automatically repositioned and redrawn after an icon is moved.



## CREATING YOUR AUTO ATTENDANT

### Setting Up Your Main Greeting

Once you have logged into the Web Portal select the *My Settings Tab*, click on the *Automated Attendant* under the *Categories Title*. Hover over the Mailbox Icon and select *Convert to Greeting*. An Edit Greeting box will open allowing you to create a name for your main greeting and to also load a recorded greeting. Since this is the first greeting that customers will hear when they call your main number it is suggested you name this your main greeting. Select *Browse* to open a dialog box where you can locate the recorded greetings that you have saved to your computer.



Once you have selected the appropriate greeting, click *Save* to complete the set up of your Main Greeting. A speaker icon with the name of your main greeting will appear in your Map Display.



## CREATING NODES FROM THE MAIN GREETING

You have several options on routing callers through your Auto Attendant.

### Greeting

If you want callers to go to a department that has multiple contact numbers you can choose the greeting option. Hover over the Main Greeting icon and then click on the *Green +* icon and select *Greeting*. A Play Greeting box will open, you can then type in the corresponding number (#) recorded in your main greeting that when pressed by the caller will route them to this greeting giving callers instructions on what number to press in order to reach a specific phone number in this department. Type in the name of the (**department**), then select the appropriate greeting for this department. If you need an option for leaving a message from this greeting and one is not available please contact customer support at 888-676-8638.



Click on *Save* when the selection has been completed. A speaker icon with the name of this greeting will appear in your Auto Attendant display.



### Called Number

If you want callers to go to a specific phone number in your company you can choose Called Number. Click on the *Green +* icon and select *Called Number*. A Called Number box will open and you can then put the corresponding number recorded in your main or department greeting that when pressed by the caller will route them to this specific phone number. Type in the corresponding number (#), (**name**) of the person to reach and the (**10 digit number**) including area code,



Clicking *Save* will complete the entry and a Phone icon for this called number will appear in your Map Display.

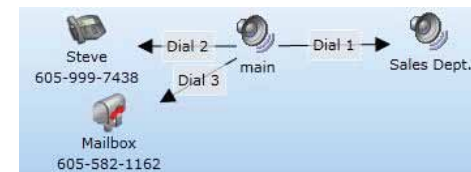


### Mailbox

If you want callers to go directly to a persons mailbox without ringing their phone you can choose the Mailbox option. Click on the *Green +* icon and select *Mailbox*. A Mailbox box will open and you can then type in the corresponding number (#) recorded in your main or department greeting that when pressed by the caller will route them to this specific mailbox. You will need to supply customer support 888-676-8638 with the phone number(s) of the mailboxes that you want in your auto attendant.



Clicking *Save* will complete the entry and a Mailbox icon for this Voice Mailbox will appear in your Map Display.



### Deleting Nodes

Hover over any of your nodes and click on the *Red X* to delete a Node from your Auto Attendant.

