



HPBX

# **USER GUIDE:** Easy Attendant

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## Overview

An Easy Attendant is a voice product used to offer your incoming callers a list of menu options accompanied by an announcement. The menu options and announcement heard can vary based on a schedule if desired.

## Logging In

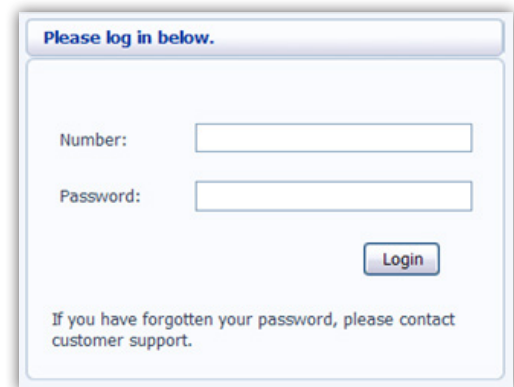
URL: <https://vm.mymetronet.net>.

Login Information:

Number: \_\_\_\_\_

Password: \_\_\_\_\_

PIN: \_\_\_\_\_



Please log in below.

Number:

Password:

Login

If you have forgotten your password, please contact customer support.

## Configuration

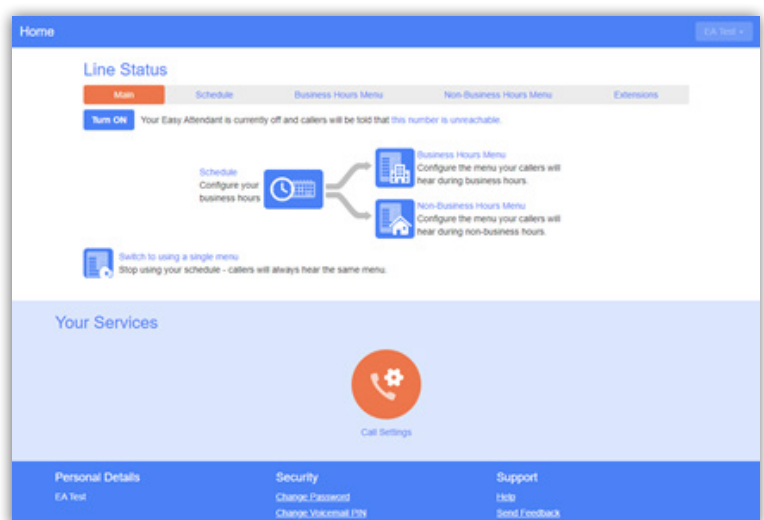
### On/Off

The On/Off control is found on the Main tab of your Easy Attendant CommPortal. Your Easy Attendant must be turned ON in order to function. It cannot be turned on until your announcement(s) have been recorded and menu(s) have been configured. **While the Easy Attendant is off, callers will simply get a busy tone.** The Easy Attendant does *NOT* need to be turned off in order to make the majority of modifications to it once live.

### Single-Menu Mode vs Schedule

There are two ways to configure your Easy Attendant: You could have one announcement and one set of menu options that is utilized 24/7, or you can build a schedule based on your business hours and non-business hours and have two separate greetings and sets of menu options. Those who use a schedule often do so to allow callers the options to speak to someone during business hours, and then send callers directly to various voicemail boxes after hours. The system automatically changes which announcements and menu options are used depending on the schedule you enter into the system.

*Note:* You can switch between these two modes at any time. This is one modification that requires you to turn your Easy Attendant OFF prior to making the change.

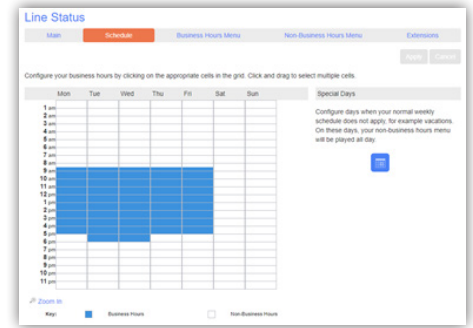


This link in the middle of the Main screen in your Easy Attendant CommPortal will offer you the option to switch from whatever option you're currently using to the other.

For more information about using a schedule, see the **Schedule** section of this document.

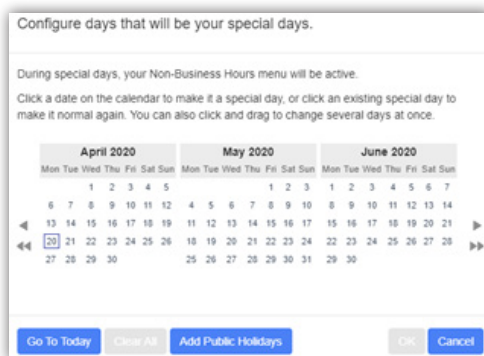
## Schedule

If you would like to have a different announcement and menu options depending on the time of day, you will need to utilize a schedule. Mark your Business Hours with blue on the weekly schedule. You can click individual boxes or click and drag large rectangular sections to mark larger amounts of time all at once. The system will automatically use the appropriate menu and greeting that you configure.



## Special Days

The Special Days option is only applicable if you are using a schedule. For days when you are going to be out of the office (e.g. holidays), you can click the Special Days calendar button on the Schedule tab to mark any days where you are going to be out of the office completely. On the days you indicate, the system will not use the Business Hours menu and greeting you have configured, but will instead continue using the Non-Business Hours menu for the entire day.



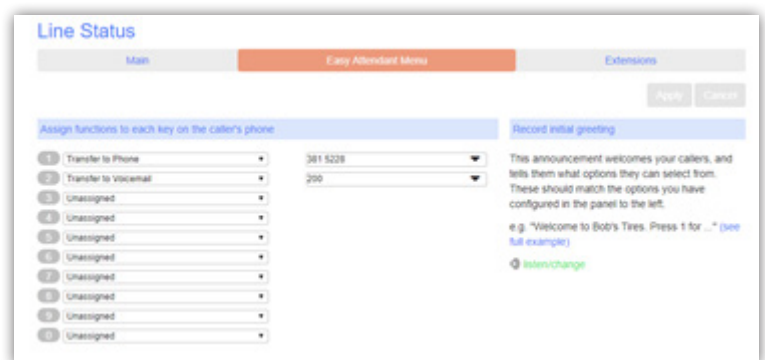
In the event where you are leaving the office for a half day, just click the day and apply Special Days as you're leaving the office. Once you hit OK and then Apply on the Schedule tab, your changes will take effect immediately and will stop using the Business Hours menu and will switch to using the Non-Business Hours menu. **Note:** The only way to schedule a partial day in advance is to modify your normal weekly schedule. **But be careful because you would need to remember to put your schedule back to the normal timeframe after that day.**

To scroll through the year, the single arrows to the left and right of the calendars move one month at a time and the double arrows move three months at a time.

## Menu(s)

You can select a different thing to happen if your callers press 0-9 while in a menu. Options include:

- Unassigned (meaning pressing that button does nothing)
- Play Announcement
- Transfer to Phone
- Transfer to Voicemail
- Dial by Extension
- Dial by Name



If you utilize a schedule, you will need to also program the menu for your Non-Business Hours period. In many cases, the menus for Business Hours and Non-Business Hours are nearly identical except that during Business Hours, the Transfer to Phone is used and in Non-Business Hours, options will Transfer to Voicemail of the same destinations.

Each Menu needs an Announcement that welcomes the callers and tells them what options they can select from.

## Announcements

Your Announcements should reference all of the options you program in the Menu for your callers. If you change the menu at any time, you need to record a new greeting.

Announcements include both the *Initial Greeting* (the announcement for the main menu) and if any keys have been designated as the *Play Announcement* function.

## Record Over the Phone

To set up your recorded announcements using a desk phone in your office:

- Access the voicemail system from your phone by tapping the envelope or Voicemail softkey. You could instead dial \*98.
- Hit \* (or 7 depending on phone configuration) to get the system to prompt to enter the 10-digit phone number of your Easy Attendant, followed by #.
- Enter the PIN for your Easy Attendant, followed by #.

## Important Prompts

**Press 1:** Change the Configuration

**Press 1:** To turn on your Easy Attendant (or off if it is currently on - however, this can also be controlled through the CommPortal)

**Press 2:** To edit announcements / To edit announcements for Business Hours (if using a schedule)

**Press 3:** To edit announcements for Non-Business Hours (if using a schedule)

*Note:* If you are using a schedule to provide a different menu for Business Hours and Non-Business Hours, you will need to record two greetings. You can change or edit your greetings at any time.

**Press 4:** Record everyone's name

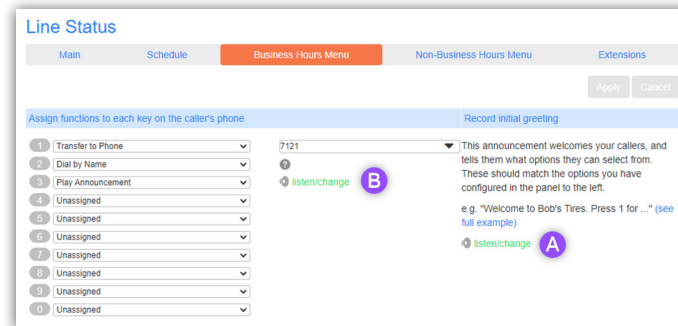
*Note:* If a user has voicemail, the recording of their name that they record during the initialization of their voicemail will be used for the attendant as well. If desired, you can override this recording manually using this prompt. This would need to be completed each time you hire a new employee so they can be added to the dial by extension or dial by name directory (if utilized).

**Press \*:** Get back to the main menu when you're done with a submenu.

## Record Using the CommPortal

Announcements can only be recorded through the CommPortal if you are logged in as an Administrator or as an End User using the specific Easy Attendant login credentials.

If your Easy Attendant has different greetings for Business Hours and Non-Business Hours, begin by clicking on the tab you want to record first. See Configuration Options for the setting schedules vs 24/7.



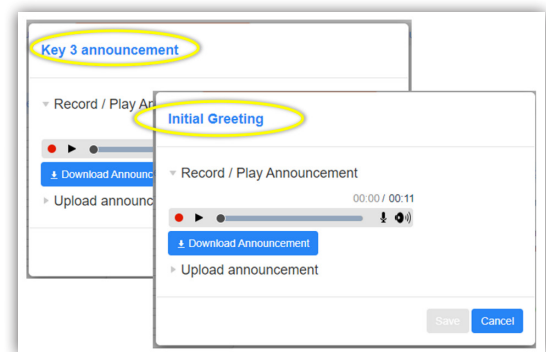
The **green link marked A** is your main greeting callers will hear when connected to the attendant.

The **green link marked B** is what your callers would hear if they pressed menu option 3 of your main menu. The options are likely to give store hours or location information.

## Upload/Download

When you click one of those green links, a separate box will open with the audio controls to record, listen to, upload new greetings, or download existing greetings. There will be a title at the top of the window to remind you which greeting you are currently accessing.

To **record**, click on the *red record button*. This will use your computer's microphone. To **download** an existing recording, click *Download Announcement* and save in a file for you to access later should you want to reapply that greeting or store a backup. To **upload** something you already have saved, click on *Upload Announcement*, navigate to your file, and then click Save.



An uploaded file must be in one of the two following formats and be 120 seconds or shorter:

- G711 WAV - 8-bit, ulaw/alaw, mono, 8kHz
- 16-bit PCM WAV - 16-bit, PCM, mono, 16kHz

## Case Use Example

If you have recorded your announcement(s) and would like to just temporarily change the greeting for a holiday or other event, click the green link for the announcement you'd like to change. Download that normal, everyday file and save it somewhere on your computer. Then, record a new announcement either over the phone or through the CommPortal. After that special event, you can come back to the CommPortal, click that green link to listen/change, and then re-upload your original saved announcement.

## Extensions

If utilizing a Dial by Name or Dial by Extension Directory, you will need to make sure everyone's extension is entered into the Easy Attendant. The system will take that user's recorded name when they do so during their voicemail initialization, or you can override and record names manually. Names can be recorded through the configuration TUI over the phone or through the CommPortal. When employees change, make sure names and recording are updated.

If you have numbers outside of your business group to which you would like to assign an extension (e.g. a cell phone or partner business office), click the Additional Extensions link and add them there.

If there are individuals that you want to exclude from the Dial by Name or Dial by Extension directories, check the box to the left of that number and then press the **Exclude Selected** button. You'll see the checkmark in the Included? column go away. To include excluded numbers, check the box to the left of that number and then press the **Include Selected** button.

The screenshot shows the 'Line Status' interface with a navigation bar at the top containing 'Main', 'Schedule', 'Business Hours Menu', 'Non-Business Hours Menu', and 'Extensions' (which is highlighted in orange). Below the navigation bar, there are two tabs: 'Business Group Extensions' (highlighted in orange) and 'Additional Extensions'. Under these tabs are four buttons: 'Include Selected', 'Exclude Selected', 'Include All Lines', and 'Exclude All Lines'. A search bar is present with the placeholder text 'Search for entry by extension, name or telephone number...'. Below the search bar is a table with the following columns: 'Extension', 'Name', 'Telephone Number', 'Department', 'Included?', and 'Spoken Name'. The table contains six rows of data, with extensions 100 through 105. The 'Included?' column shows a checkmark for all entries, and the 'Spoken Name' column shows a 'record' button for each entry.

<input type="checkbox"/>	Extension	Name	Telephone Number	Department	Included?	Spoken Name
<input type="checkbox"/>	100				✓	record
<input type="checkbox"/>	101				✓	record
<input type="checkbox"/>	102				✓	record
<input type="checkbox"/>	103				✓	record
<input type="checkbox"/>	104				✓	record
<input type="checkbox"/>	105				✓	record