



Using the Auto Attendant

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Auto Attendant

With older phone systems, every office needed someone who answered the phone, routed calls, and took messages. This person usually performed other tasks too and answering the phone created disruptions which prevented the tasks from being accomplished. Now, with Allworx, the phone is answered automatically by the Auto Attendant which frees up the operator for other duties.

Using the Auto Attendant to answer your phone automatically helps direct callers to the person or department they want most. Callers can listen to a list of services and decide which one best suits their need, or use the directory to locate the extension for an employee. For small businesses, the Auto Attendant gives the impression of a larger company.

You can set up anywhere from 1 to 9 Auto Attendants depending on your need with each Auto Attendant being assigned to one or more Outside Lines. For example, you may use one Auto Attendant to answer calls for Sales and another for Service. In addition, you can record three greetings for each Auto Attendant: a custom message to be used any time, one to be used during business hours, and the third to be used during the off-hours.

To set up an Auto Attendant, you must

- Configure the Auto Attendant
- Assign the Auto Attendant to an Outside Line
- Record the greetings for the Auto Attendant



You'll need this much time

Setting up Auto Attendants will take less than **20 minutes**.



Gather This Information

You'll need the following information:

- The **content** or **script** that you record as a greeting for each Auto Attendant.
- The **Outside Line** to which each Auto Attendant will be assigned.
- **User extension** or **system extension** to be called when the caller dials 0.
- **User extension, system extension, or Auto Attendant** to be called as a result of using the shortcut (*optional*).



Before You Begin

- Make sure the person at the extension you're designating as the operator is ready to receive calls.

How to Configure the Auto Attendant

1. Expand **Phone System** and click **Auto Attendants**.

Home > Phone System > Auto Attendants

Phone System

The table below displays the current settings for the Auto Attendants' Prompts, Features, and Operator Extensions. You can also [manage the content](#) of the Auto Attendants' Greetings and Messages.

Auto Attendants										
Attendant	PROMPTS				FEATURES			Operator Extension	Action	
	Name	Ext.	Dial End	Repeat	Name	Ext.	Speed			
431 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	Modify
432 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
433 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
434 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
435 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
436 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
437 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
438 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
439 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	

Auto Attendant Menu Shortcuts map a single digit entered by the caller to an extension.

Auto Attendant - Menu Shortcuts 2									
Attendant	DIGIT								Action
	1	2	3	4	5	6	7	8	
431 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
432 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
433 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
434 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
435 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
436 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
437 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
438 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
439 - Auto Attendant	---	---	---	---	---	---	---	---	Modify

Auto Attendants page

2. The nine Auto Attendants are numbered 431 to 439. The list of Attendants shows the Prompts, Features, and Operator Extensions for each one. Click **Modify** to set up any Auto Attendant.

Home > Phone System > Auto Attendants > Modify

Phone System

The Allworx® allows you to selectively enable certain prompts and features for each Auto Attendant. This is useful if you have recorded your own custom greetings or messages and no longer wish to play the default Allworx prompts.

Prompts: (the prompt will be played if its box is checked below)

Name "Press #1 to dial by name."
 Ext. "Press #2 for a listing of all users and their extensions."
 Dial "If you know your party's extension you may dial it now."
 End "Press 9, or hang up, to end your call."
 Repeat "Press * to listen to these choices again."

Features: (the feature will be enabled if its box is checked below)

Name entering #1 plays Dial By Name menu
 Ext. entering #2 plays list of users and extensions
 Speed entering 350-399 transfers to speed dial numbers

TIP

You may find it helpful to make some changes, then dial the Auto Attendant to test the effect of the new settings.

Operator Extension - defines the extension dialed when the caller dials 0 in the attendant main menu

Attendant	PROMPTS				FEATURES			Operator Extension
	Name	Ext.	Dial	End	Repeat	Name	Ext.	
431 Auto Attendant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 - Operator
432 Auto Attendant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 - Operator
433 Auto Attendant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 - Operator
434 Auto Attendant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 - Operator
435 Auto Attendant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 - Operator
436 Auto Attendant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 - Operator
437 Auto Attendant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 - Operator
438 Auto Attendant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 - Operator
439 Auto Attendant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0 - Operator

Modify Auto Attendants page

3. A *Prompt* is a message from the Auto Attendant that gives the caller instructions on what to do next. Select the **Prompts** you want for each Auto Attendant:

Prompt	Message
Name	"Press #1 to dial by name."
Ext.	"Press #2 for a listing of all users and their extensions."
Dial	"If you know your party's extension, you may dial it now."
End	"Press 9, or hang up, to end your call."
Repeat	"Press * to listen to these choices again."

4. A *Feature* is a task that the Auto Attendant performs when the caller dials a certain sequence. Select the **Features** you want for each Auto Attendant:

Feature	Description
Name	The Dial-By-Name menu is played when the caller presses #1.
Ext.	The list of users and extensions is played when the caller presses #2.
Speed	The caller is transferred to the list of speed dial numbers when any number between 350 and 399 is dialed.

5. Select an **Operator Extension** that will be dialed if the caller dials 0 during the Auto Attendant announcement.
6. Click **Update**.
7. Call each of the Auto Attendants to check its Prompts and Features. Make changes, if desired.

How to Assign the Auto Attendant to an Outside Line

1. Expand **Phone System** and click **Outside Lines**.

The screenshot shows the 'Phone System' interface with the 'Outside Lines' page selected. The page contains several sections:

- Analog Outside (CO) Lines:** A table with columns for Line, Type, Port, and Action.

Line	Type	Port	Action
01	FXO	01	Modify Delete
02	FXO	02	Modify Delete
03	FXO	03	Modify Delete
04	FXO	04	Modify Delete
05	FXO	05	Modify Delete
06	FXO	06	Modify Delete
07	FXO	07	Modify Delete
- Direct Inward Dial Blocks:** A table with columns for Block and Action, containing a 'New DID Block' button.
- Direct Inward Dial Routing Plans:** A message stating: 'No Routing Plans have been defined. New Routing Plans can be created when a new DID Block is added, or an existing DID Block is modified.'
- SIP Gateways:** A table with columns for Gateway and Action, containing a 'New SIP Gateway' button.
- SIP Proxies:** A table with columns for Proxy and Action, containing a 'New SIP Proxy' button.
- Remote Allworx:** A table with columns for Remote Allworx and Action, containing a 'New Remote Allworx' button.

Outside Lines page

2. Click **Modify** next to the Outside Line that you would like answered by the Auto Attendant.

The screenshot shows the 'Modify Outside Line' page with the following configuration options:

- Outside Line:**
 - Port: 02
 - Description: 02 (typically enter phone number of line connected to Allworx)
- Features:**
 - Enable Caller ID Detection
 - Prefix Digits: (digits dialed by Allworx after it seizes the line, before user dials)
- Call Route:**
 - Calls received from this CO line go to:
 - Extension: choose an extension
 - Auto Attendant: Auto Attendant (x431)
 - Voicemail for user: Lesley A Smith

Buttons at the bottom: Update, Start Over, Cancel.

Modify Outside Lines page

3. For Call Route, make sure that **Auto Attendant** is selected. Select the Auto Attendant you want to answer incoming calls on this line.
4. Click **Update**.
5. Repeat steps 2 – 4 for each Auto Attendant you want to assign to each line.

How to Record the Auto Attendant Greetings

In addition to the Prompts you selected, you can record three greetings for each Auto Attendant:

- A message to be played during business hours
- A message to be played after business hours
- A custom message to be played at any time

The greetings and prompts are played in this order:

1. Business or Non-Business Hours greeting, depending on the day and time of day
2. Custom greeting
3. *Dial* prompt: "If you know your party's extension, you may dial it now."
4. *Name* prompt: "Press #1 to dial by name."
5. *Ext.* prompt: "Press #2 for a listing of all users and their extensions."
6. *End* prompt: "Press 9, or hang up, to end your call."
7. *Repeat* prompt: "Press * to listen to these choices again."

If the Custom greeting or any of the prompts are not selected, then they are skipped in order.

If the caller presses * to hear the selections again, the Business/Non-Business Hours greeting is skipped.

1. Dial the Auto Attendant extension (431-439) you want to change. You will hear the default welcome greeting.
2. Dial # and 9.
3. After the beep, enter the password you used to log on.
4. Select:

Dial	Greeting
1	Business Hours
2	Non-business Hours
3	Custom
#	Return to the Welcome message
*	Replay the options

5. Press 2 to start recording after the beep. Press # when you are finished. You can adapt the following scripts for your message.

Greeting	Sample Script
Business hours	<p>Welcome to <your company name>, your best source for <product>.</p> <p>Dial 1 for store hours and directions. Dial 2 for Sales. Dial 3 for Service. Dial 0 to reach the operator.</p>
Non Business hours	<p>Welcome to <your company name>, your best source for <product>. We are currently closed but will re-open at <opening time>. Our hours are <hours of operation>.</p> <p>If you know your party's extension, you may dial it now. You may also leave a message in our general mailbox at extension <number>.</p>
Custom	<p><Your company name> is the premier provider of <products>. We specialize in <specialty>. Our latest product is . . .</p>

6. Select:

Dial	Task
1	Save the greeting
2	Change the greeting
3	Review the greeting
#	Cancel the changes
*	Replay the options

7. Repeat steps 1 – 6 for each Auto Attendant for which you want to record a greeting.

How to Set Up Shortcuts for Auto Attendants

You can now use shortcuts with the Auto-Attendants so a caller can transfer to an extension using a single digit. The shortcut can direct the caller to a user extension, a system extension, or another Auto Attendant. You can set up 8 different shortcuts for each Auto Attendant.

1. Expand **Phone System** and click **Auto Attendants**.

Home > Phone System > Auto Attendants

Phone System

The table below displays the current settings for the Auto Attendants' Prompts, Features, and Operator Extensions. You can also [manage the content](#) of the Auto Attendants' Greetings and Messages.

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Attendant	PROMPTS					FEATURES			Operator Extension	Action
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434 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
435 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	Modify
436 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
437 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
438 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	
439 - Auto Attendant	play	play	play	play	play	allowed	allowed	---	0	

Auto Attendant Menu Shortcuts map a single digit entered by the caller to an extension.

Auto Attendant - Menu Shortcuts									
Attendant	DIGIT								Action
	1	2	3	4	5	6	7	8	
431 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
432 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
433 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
434 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
435 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
436 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
437 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
438 - Auto Attendant	---	---	---	---	---	---	---	---	Modify
439 - Auto Attendant	---	---	---	---	---	---	---	---	Modify

Auto Attendants page

2. Click **Modify** in the Menu Shortcuts next to the Auto Attendant for which you want to set up a shortcut.

Home > Phone System > Auto Attendants > Modify Menu Shortcuts

Phone System

Auto Attendant **menu shortcuts** allow a caller to press a single digit to transfer to an extension. You can define shortcuts for digits 1 through 8. A shortcut can transfer to an internal user, system extension, or to another Auto Attendant.

Menu Shortcuts	
Digit	Extension
1	not used
2	not used
3	not used
4	not used
5	not used
6	not used
7	not used
8	not used

Modify Menu Shortcuts page

3. Select the extension for each digit you want to assign.

4. Click **Update**.
5. Repeat steps 2 – 4 to set up shortcuts for each Auto Attendant.