

# Create an Auto Attendant (IVR)

## Scope:

The following steps will allow you to create an Auto Attendant (IVR)

## Requirements:

- Office Manager access to the Manager Portal
- A script that includes your options
- Your recording in MP3 or WAV format (Optional)

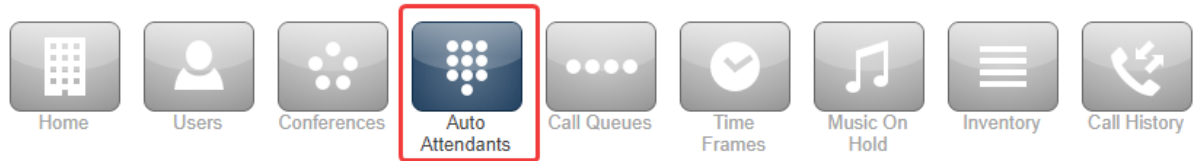
## Example Script

"Thank you for calling Acme Company. if you know the extension you'd like to reach you may dial it at any time. For accounting, press 1. For sales, press 2. For support, press 3. To hear our company directory press 9. Otherwise please stay on the line and you will be connected with an operator."

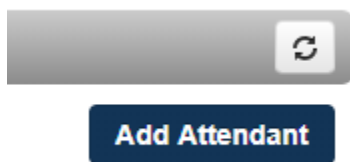
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# Create Auto Attendant

1. Using any web browser log into your Manager Portal
2. From the top navigation select **Auto Attendants**



3. Click **Add Attendant**



4. In the popup fill out the following information:

- **Name** : Enter any descriptive name. The best practice is to prefix your name with AA. Only use alphanumeric characters. No special characters.
- **Extension** : Enter any unused extension number from 9000-9099 as per [Reserved Number Space](#). Make sure this extension is available or you will receive a warning message
- **Time Frame** : default (all the time)  
**NOTE: Selecting other time frames is possible. However, you will not be able to route calls to the Auto Attendant outside of that time frame, and cannot change the time frame after the fact. The Auto Attendant will have to be recreated.**

5. Click **Add**

## Add an Auto Attendant



Name

Extension  **New**

Note: Extension cannot be changed

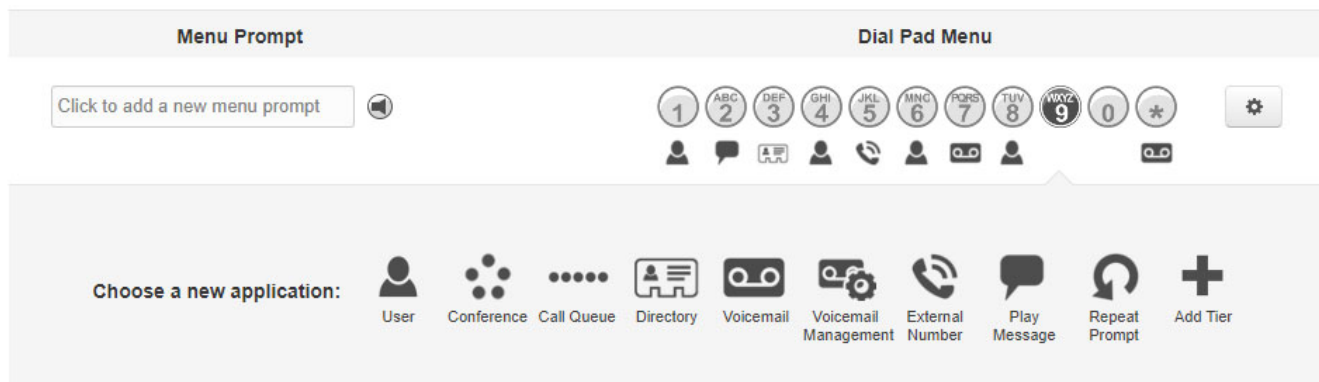
Time Frame  ▼

Cancel

Add

# Auto Attendant Applications

You will see an icon for each of the options a user may dial. To configure these options click on the respective icon and select one of the following:



- **User** : Transfer call to any user or extension.  
**NOTE: Make sure Enable Enhanced Voicemail is unchecked**
- **Conference** : Transfer call to any conference bridge.
- **Call Queue** : Transfer call to any call queue.
- **Directory** : Plays a company directory with a dial by name. Any users that have the "List Directory" option will be listed here.
- **Voicemail** : Sends call directly to a user's voicemail box.  
**NOTE: Make sure Enable Enhanced Voicemail is unchecked**
- **Voicemail Management** : Allows the caller to access any user's voicemail and change administrative options. Requires extension number and password for access.
- **External Number** : Forward to an offnet number (cell phone or answering service)
- **Play Message** : Plays a recorded message, then gives you the option to transfer the caller.
- **Repeat Prompt** : Repeats **Menu Prompt**
- **Add Tier** : Adds another level of Auto Attendant menus

**Options** : Additional options

- **Dial by Extension** : Allows callers to dial a party's extension instead of an option
- **If no key pressed** : Option to follow if no key is pressed.
- **If unassigned key pressed** : Option to follow if a wrong key is pressed.

**Options** ×

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Enable Dial by Extension

If no key is pressed Follow 1 ▼

If unassigned key is pressed Follow 1 ▼

Done

Select your options and click the **Save** button.

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# Example Configuration

**Script** : "Thank you for calling Acme Company. if you know the extension you'd like to reach you may dial it at any time. For accounting, press 1. For sales, press 2. For support, press 3. To hear our company directory press 9. Otherwise please stay on the line and you will be connected with an operator."

## 1. Option 1: Select **User** and select extension for Accounting

The screenshot shows a configuration interface with two main sections: "Menu Prompt" and "Dial Pad Menu".

- Menu Prompt:** Contains a text input field with the placeholder "Click to add a new menu prompt" and a speaker icon.
- Dial Pad Menu:** Contains a grid of buttons for digits 1-9, 0, and \*. Each digit button has its corresponding letters above it (e.g., 1 has no letters, 2 has ABC, etc.). The button for digit '1' is highlighted with a red box and a small person icon below it.
- Options:** A button located to the right of the dial pad.

Below the main interface is a modal window titled "Choose the User to send the call to when 1 is pressed:".

- It features a search input field containing "ac".
- A dropdown menu is open, showing the option "4002 (RG Accounting)" highlighted with a red box.
- There is a "Caller ID Prefix:" input field below the dropdown.
- At the bottom of the modal are "Save" and "Cancel" buttons.

## 2. Option 2: Select **User** and select extension for Sales

The screenshot shows the same configuration interface as above, but with different settings.

- Dial Pad Menu:** The button for digit '2' is highlighted with a red box and a small person icon below it.
- Options:** A button located to the right of the dial pad.

Below the main interface is a modal window titled "Choose the User to send the call to when 2 is pressed:".

- It features a search input field containing "sal".
- A dropdown menu is open, showing the option "4001 (RG Sales)" highlighted with a blue box.
- There is a "Caller ID Prefix:" input field below the dropdown.

### 3. Option 3: Select **User** and select extension for Support

The screenshot shows the 'Dial Pad Menu' configuration interface. The 'Menu Prompt' section has a button 'Click to add a new menu prompt' and a speaker icon. The 'Dial Pad Menu' section shows a numeric keypad with letters assigned to each number. The number '3' is highlighted with a red box. Below the keypad, there are three user icons. A modal window is open, showing 'Choose the User to send the call to when 3 is pressed:'. The text 'sup|' is entered in the search field, and the result '4003 (RG Support)' is highlighted in blue. There is also a 'Caller ID Prefix:' field.

### 4. Option 9: Select **Directory**

The screenshot shows the 'Dial Pad Menu' configuration interface. The 'Menu Prompt' section has a button 'Click to add a new menu prompt' and a speaker icon. The 'Dial Pad Menu' section shows a numeric keypad with letters assigned to each number. The number '9' is highlighted with a red box. Below the keypad, there are three user icons. A modal window is open, showing 'Choose a new application:'. The 'Directory' application is highlighted with a red box. Other applications include User, Conference, Call Queue, Voicemail, Voicemail Management, External Number, Play Message, Repeat Prompt, and Add Tier.

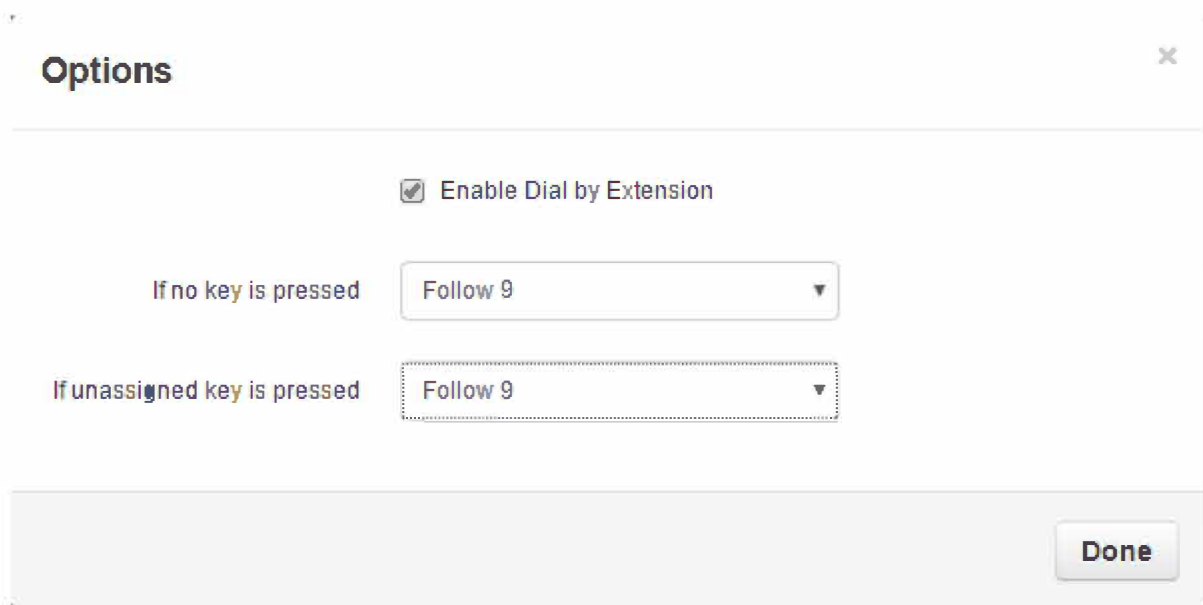
### 5. Option 0: Select **User** and select extension for Operator

The screenshot shows the 'Dial Pad Menu' configuration interface. The 'Menu Prompt' section has a button 'Click to add a new menu prompt' and a speaker icon. The 'Dial Pad Menu' section shows a numeric keypad with letters assigned to each number. The number '0' is highlighted with a red box. Below the keypad, there are three user icons. A modal window is open, showing 'Choose the User to send the call to when 0 is pressed:'. The text '1000 (Inara Serra)' is entered in the search field and highlighted in blue. There is also a checkbox for 'Enable enhanced voicemail' and a 'Caller ID Prefix:' field.

### 6. Click **Options**

- Enable **Dial by extension**
- Set remaining options to follow option 9

- Click **Done**



The image shows a dialog box titled "Options" with a close button (X) in the top right corner. Inside the dialog, there is a checked checkbox labeled "Enable Dial by Extension". Below this, there are two rows of settings. The first row is labeled "If no key is pressed" and has a dropdown menu set to "Follow 9". The second row is labeled "If unassigned key is pressed" and also has a dropdown menu set to "Follow 9". At the bottom right of the dialog, there is a button labeled "Done".

7. Click **Save**