# Company Information

|  |  |
| --- | --- |
| Company Name |  |
| Address |  |
| City/State/Zip |  |
| Service Provider |  |
| Main Phone Number |  |
| Fax Number |  |
| Office Email |  |
| Billing Email |  |

# Site Phone Numbers

|  |  |  |
| --- | --- | --- |
| Example | 555-555-5555 | 301, 302, 303 |
| Main # |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| Fax # |  |  |

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 311 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)  
[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 321 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)  
[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 331 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)  
[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 341 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)  
[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 351 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)  
[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 361 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)  
[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 371 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)

[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 381 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)  
[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 391 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)  
[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

# User Info

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Phone Ext | 3101 |
| Email |  |

## Additional Options:

[ ] Call Recording ($)  
[ ] Voice Mailbox  
[ ] Voicemail to Email  
[ ] SMS/MMS Platform ($)  
[ ] Fax to Email ($)  
[ ] Connect UC Soft Phone  
[ ] Other (please specify): \_\_\_\_\_\_\_\_\_\_\_

## Ring Groups

## Ring Groups: Please Add any ring group you would like setup.

|  |  |  |
| --- | --- | --- |
| Ring Group | Ring Group Name | Users to be in Ring Group |
| Example | Main (6xx) | 301, 302, 303 |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 0 |  |  |

# IVR Tree

## Actions Descriptions:

- Transfer to Extension: Transfers the call to a specified internal extension.  
- Play Message: Plays a pre-recorded message to the caller.  
- Go to Submenu: Directs the caller to a submenu with additional options.  
- Ring Group: Rings multiple extensions simultaneously or in a specific order.

## Example IVR Tree

Hello, thank you for calling. Sorry we missed your call. Please listen to the following prompts:

Press 1 for office (301, 302, 303)  
Press 2 for sales (304, 305, 306)  
Press 3 for directions (Play Message)  
Press 4 for a list of employees (Go to Submenu)  
Press 5 to leave a message in our general Voicemail.

## IVR Example 1xx

Prompt:

|  |  |  |
| --- | --- | --- |
| Option Number | Description | Action (e.g., Transfer to Extension, Play Message, Go to Submenu, Ring Group) |
| 1 | Office | Ring Group 601 (301, 302, 303) |
| 2 | Sales | Ring Group 602 (304, 305, 306) |
| 3 | Directions | Play Message |
| 4 | List of Employees | Go to Submenu |
| 5 | Leave a Message | Voicemail |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 0 |  |  |

## Submenu for Option 1

Prompt:

|  |  |  |
| --- | --- | --- |
| Option Number | Name | Ring user First or directly to VM |
| 1 Front desk | Sam Doe |  |
| 2 Accounting | John Smith | Ring Then VM |
| 3 Steve | Steve | Ring Then VM |
| 4 Joe | Joe | Ring Then VM |
| 5 Manager | Sarah | Direct VM |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 0 |  |  |

## IVR Setup

## IVR Setup: please add any options you would like.

Prompt:

|  |  |  |
| --- | --- | --- |
| Option Number | Description | Action (e.g., Transfer to Extension, Play Message, Go to Submenu, Ring Group) |
| 1 | Office | Ring Group 601 (301, 302, 303) |
| 2 | Sales | Ring Group 602 (304, 305, 306) |
| 3 | Directions | Play Message |
| 4 | List of Employees | Go to Submenu |
| 5 | Leave a Message | Voicemail |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 0 |  |  |

## Submenu for Option 1

Prompt:

|  |  |  |
| --- | --- | --- |
| Option Number | Name | Ring user First or directly to VM |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 0 |  |  |

## Submenu for Option 1

Prompt:

|  |  |  |
| --- | --- | --- |
| Option Number | Name | Ring user First or directly to VM |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 0 |  |  |

## IVR 102

Prompt:

|  |  |  |
| --- | --- | --- |
| Option Number | Description | Action (e.g., Transfer to Extension, Play Message, Go to Submenu, Ring Group) |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 0 |  |  |

## Submenu for Option 1

Prompt:

|  |  |  |
| --- | --- | --- |
| Option Number | Name | Ring user First or directly to VM |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |
| 7 |  |  |
| 8 |  |  |
| 9 |  |  |
| 0 |  |  |