

Create Auto Attendant Profile Worksheet

Use this worksheet to outline how you would like your inbound calls to be directed when they reach the Auto Attendant. Then use the online Account Manager to create your Auto Attendant profile.

Name Your Profile:

Will your phone menu options and recordings be different depending on the hours of the day when your business is open or closed?

<p><input checked="" type="checkbox"/> Yes Choose yes, if you want to have different menu options and recordings for when your business is open and when it is closed</p> <p>Steps:</p> <ol style="list-style-type: none"> 1. Define Your Business Hours of Operations <ul style="list-style-type: none"> • Select Define Business Hours • Optional: <ul style="list-style-type: none"> - Lunch Hour - Business Hour Exceptions - Holiday Hours 2. Enter Rules for Business and After Hours menus 3. Optional: Enter Rules for Lunch and Holiday Hours menus 4. Create or Upload Recordings & Test Menu 	<p><input type="checkbox"/> No Choose no, if the same menu options and recordings will play all day, everyday</p> <p>Steps:</p> <ol style="list-style-type: none"> 1. Define Your Business Hours of Operations <ul style="list-style-type: none"> • Select 24/7 Business Hours • Optional: <ul style="list-style-type: none"> - Holiday Hours 2. Enter Rules for Business Hours 3. Optional: Enter Rules for Holiday Hours 4. Create or Upload Recordings
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Define Your Business Hours

24/7 Business Hours: Skip this section

Define Business Hours: Enter your business hours (hours you are open).

Business Hours

Day	Start Time	End Time
Sunday	Closed	
Monday	7 am	5 pm
Tuesday	7 am	5 pm
Wednesday	7 am	5 pm
Thursday	7 am	5 pm
Friday	7 am	5 pm
Saturday	8 am	4 pm

Business Hour Exceptions (optional)

Business Hour Exceptions allows you to temporarily modify the regular Business Hours defined above

Date	Start Time	End Time
12/24/2012	8 am	8 pm

Lunch Hour (optional)

To create additional menus and recordings for a dedicated lunch period, enter hours below.

Week Day	Start Time	End Time
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

Holiday Hours (optional)

To create additional menus and recordings to be used when your business is closed for a holiday, enter dates below (example: Jan, 1 2012, New Year's Day)

Date	Description

Enter Rules for Business Hours or 24/7 Menu

24/7 Business Hours: This menu will be used at all times.

Define Business Hours: This menu will be used during business hours

Determine the options your callers can choose from and where calls will be routed when option is selected. Each menu can use numbers 0 through 9, with 0 normally reserved for an operator or live receptionist.

Example Menu and Script:

Main Menu		Route To		
Key	Description	Notes	Action (Transfers to)	Action Details (Ext, RG, etc.)
1	Sales	Current customer to Account Managers and new customers to inside.	Submenu	
2	Shipping	Cindy	Extension	Ext. 1005
3	Support	Support Team	Ring Group	RG 2011 Support
4				
5				
6				
7				
8	Corporate Directory		Corporate Directory	
9	Repeat Menu		Repeat Menu	
0	Operator	Mark, Jack and Cindy	Ring Group	RG 1011 Op

Thank you for calling Acme Corporation. For Sales press 1; For Shipping press 2; For Support press 3; For the Corporate Directory press 5; To speak to the Operator press zero.

Enter your menu options here: **Enable Dial by Extension**

Main Menu		Route To		
Key	Description	Notes	Action (Transfers to)	Action Details (Ext, RG, etc.)
1	ORDER STATUS	Inquiries on order status	Extension	Extn 1002 - John in Sales
2	SALES	Select desired area of sales with a Submenu	Submenu	Sales Submenu
3	SHIPPING	Shipping staff Rob, Jasmine, and Steve	Ring Group	Extn 2002 - Shipping Ring Group
4				
5				
6				
7				
8	CORPORATE DIRECTORY		Company Directory	
9	REPLAY MENU		Repeat Menu	
0	OPERATOR		Extension	Extn 1001- Front Desk

Available Actions:

Company Directory
Conference Bridge
Dial by Extension
Dial by Name
Repeat Menu
Transfer to Auto Attendant
Transfer to Extension
Transfer to Ring Group
Transfer to Submenu
Voicemail System

Draft Script Here:

WORK SHEET
Auto Attendant

Thank you for calling Specialty Cookies, voted the number one bakery by Best of Magazine. If you know your party's extension, you may dial the number at any time. To check on the status of an order, press 1. To talk to our Sales department, press 2. For Shipping, press 3. To access our corporate directory press 8. To hear this menu again, press 9. For operator assistance, press 0.

Enter Rules for After Hours Menu and Business Exceptions

24/7 Business Hours: Skip this section

Define Business Hours: This menu will be used when your business is closed. If you choose to have Business Hour Exceptions, this menu will also play during this time.

Example Menu and Script:

Main Menu		Route To		
	Description	Notes	Action (Transfers to)	Action Details (Ext, RG, etc.)
1	Sales	Sales voicemail	Ring Group	RG VM Sales
2				
3				
4	Dial by Name		Dial by Name	
5				
6				
7				
8	Corporate Directory		Corporate Directory	
9				
0				

Thank you for calling Acme Corporation. Our office is now closed. Our regular business hours are Monday through Friday, 8am to 5pm, excluding holidays. To leave a message for Sales, press 1; To dial by name press 4; For the Corporate Directory press 8. For technical support and all other business, please call back during regular business hours.

Enter your menu options here: Enable Dial by Extension

Main Menu		Route To		
Key	Description	Notes	Action (Transfers to)	Action Details (Ext, RG, etc.)
1				
2	Sales Voicemail	Sales ring group voicemail	Ring Group	VM Sales Ring Group
3	Shipping Voicemail	Shipping ring group voicemai	Ring Group	VM Shipping Ring Group
4	Others	Front Desk voicemail	Extension	VM Front Desk
5				
6				
7				
8				
9	Replay Menu		Repeat Menu	
0				

Available Actions:

Company Directory
Conference Bridge
Dial by Extension
Dial by Name
Repeat Menu
Transfer to Auto Attendant
Transfer to Extension
Transfer to Ring Group
Transfer to Submenu
Voicemail System

Draft Script Here:

Thank you for calling Specialty Cookies. Our office is now closed. To leave a message for our Sales team, press 2. To leave a message for shipping, press 3. For all other messages or to hear our business hours, press 4. To replay this menu, press 9.

Optional Lunch and Holiday Menus

24/7 Business Hours: Skip this section

Define Business Hours: Optional menus

Enter your menu options here: Enable Dial by Extension

Main Menu		Route To		
Key	Description	Notes	Action (Transfers to)	Action Details (Ext, RG, etc.)
1				
2				
3				
4				
5				
6				
7				
8				
9				
0				

Available Actions:

Company Directory
Conference Bridge
Dial by Extension
Dial by Name
Repeat Menu
Transfer to Auto Attendant
Transfer to Extension
Transfer to Ring Group
Transfer to Submenu
Voicemail System

Draft Script Here:

Enter your menu options here: Enable Dial by Extension

Main Menu		Route To		
Key	Description	Notes	Action (Transfers to)	Action Details (Ext, RG, etc.)
1				
2				
3				
4				
5				
6				
7				
8				
9				
0				

Available Actions:

Company Directory
Conference Bridge
Dial by Extension
Dial by Name
Repeat Menu
Transfer to Auto Attendant
Transfer to Extension
Transfer to Ring Group
Transfer to Submenu
Voicemail System

Draft Script Here:

Submenus

Your Auto Attendant can have up to four submenu levels

Submenus can be used for:

- Additional routing of calls within a department
- Multiple locations
- Multiple businesses or business within a business
- Multiple languages
- Recorded messages and announcements

Example:

Main Menu

- Press **1** for Technical Support
- Press **2** for Sales
- Press **3** for Finance
 - Finance Submenu (Submenu Level 1)
 - Press **1** for Accounts Payable
 - Accounts Payable Submenu (Submenu Level 2)
 - Press 1 for Suzy Smith
 - Press 2 for John Jones
 - Press **2** for Accounts Receivable

For each submenu you will need to outline the menu options and create a menu recording for each one. Please use the blank templates at the end of this document to outline additional submenus you will need.

Enter your menu options here: **Enable Dial by Extension**

Main Menu		Route To		
Key	Description	Notes	Action (Transfers to)	Action Details (Ext, RG, etc.)
1	WEDDINGS		Extension	Rick's extension
2	CUSTOM ORDERS		Extension	Judy's extension
3	OTHERS		Ring Group	extn 2001 - Sales ring group
4				
5				
6				
7				
8	REPLAY SUBMENU		Repeat Menu	
9	REPLAY MAIN MENU		Previous Menu	
0				

Available Actions:

Company Directory
Conference Bridge
Dial by Extension
Dial by Name
Repeat Menu
Transfer to Auto Attendant
Transfer to Extension
Transfer to Ring Group
Transfer to Submenu
Voicemail System

Draft Script Here:

For weddings, press 1. For custom orders, press 2. For all other inquiries, press 3.

Additional Templates

Menu: Enable Dial by Extension

Main Menu		Route To		
Key	Description	Notes	Action (Transfers to)	Action Details (Ext, RG, etc.)
1				
2				
3				
4				
5				
6				
7				
8				
9				
0				

Available Actions:

Company Directory
Conference Bridge
Dial by Extension
Dial by Name
Repeat Menu
Transfer to Auto Attendant
Transfer to Extension
Transfer to Ring Group
Transfer to Submenu
Voicemail System

Draft Script Here:

Menu: Enable Dial by Extension

Main Menu		Route To		
Key	Description	Notes	Action (Transfers to)	Action Details (Ext, RG, etc.)
1				
2				
3				
4				
5				
6				
7				
8				
9				
0				

Available Actions:

Company Directory
Conference Bridge
Dial by Extension
Dial by Name
Repeat Menu
Transfer to Auto Attendant
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Transfer to Ring Group
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Voicemail System

Draft Script Here: