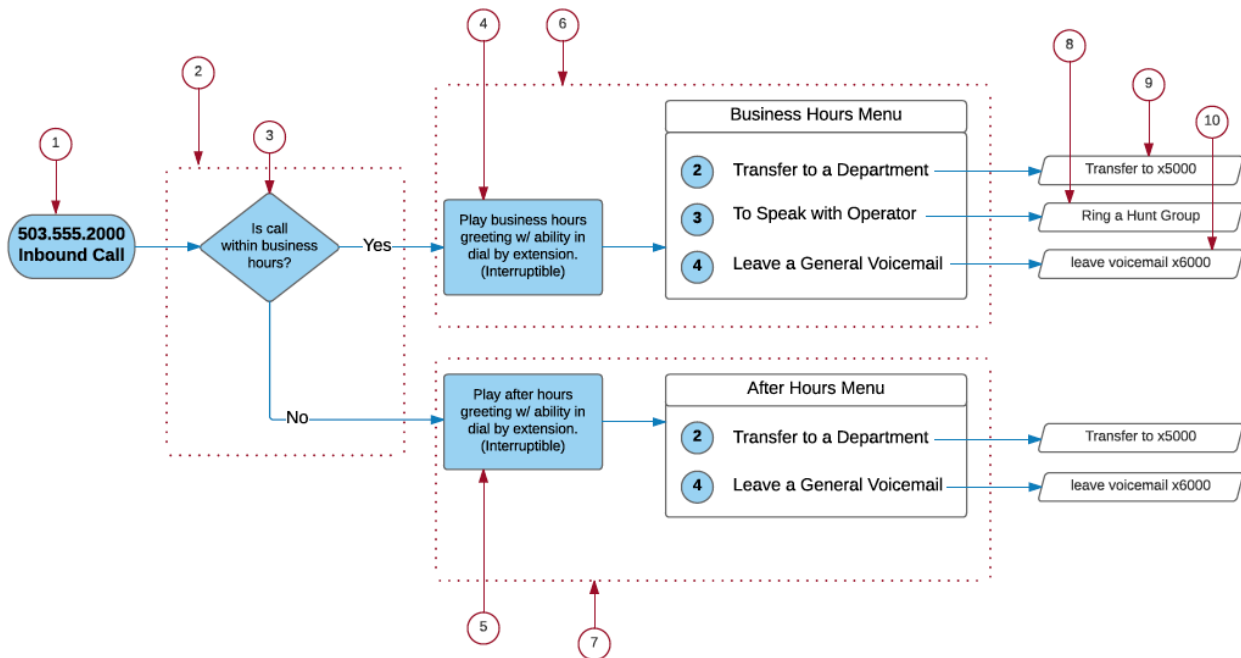# Creating an Auto Attendant

This article will guide you through setting up an advanced menu system or auto attendant in your NocTel control panel. This article will describe making an auto attendant to match the flow chart shown below.

When working to create an auto attendant NocTel recommends starting by creating a flow chart as a guide.

This example, we will use three virtual extensions to control the call flow for inbound calls from 503.555.2000. One extension will be used to direct the call based on time and two separate extensions will provide the two menus with their options.

Before beginning, determine what components are needed for the call flow and create them first. This includes items that will need to be recorded and any schedules.

This example calls for the following components:

1. A Phone Number to be purchased or ported
2. Inbound Routing Extension
3. Business Hour Schedule
4. Business Hours Audio Greeting
5. After Hours Audio Greeting
6. Business Hours Menu Extension
7. After Hours Menu Extension
8. Operator Hunt Group
9. Virtual Extension x5000 – Department Voicemail
10. Virtual Extension x6000 – General Voicemail

Create all of the above items before continuing.

Setting the Inbound Behavior for the Inbound Routing extension:

1. Click on the Inbound Routing virtual extension to direct call flow based on time or day.
2. Click on the **Edit** link in the **Inbound Behavior** area. This will open up the **Steps Page** for the extension.

3. Set **Step 1** to "**Preform Next Step Only if…**" by selecting it from the drop-down list.
4. Inside the "**Preform Next Step Only if…**" are several options. For this setup, select **INSIDE** for the first option. Then select the schedule created in the **Routing Schedule** drop-down box.

Step #1

Perform Next Step Only If... ⬍

Only perform the following step if all of the criteria are met:

INSIDE ⬍ Routing Schedule Business Hours ⬍

AND Variable [   ] DOES ⬍ EQUAL ⬍ [   ]

You may add more criteria by following this immediately with another "Perform Next Step Only If..."

Once a call reaches this extension, the system will check to see if the call is INSIDE the routing schedule called Business Hours. If the call is inside the hours specified, then the call will progress to step 2. If the call is outside the scheduled time, it will skip step 2 and proceed to step 3.

5. For **Step 2,** select "**Transfer to Extension**" as the main function in **Step 2** and select the **"Business Hours Menu"** from the list in the "**Which extension?**" area.

Step #2

Transfer to Extension ▪ ⬍

Which extension? — Business Hours Menu ⬍

After transferring, call is no longer controlled by this action list.

Caller will be sent to Step #1 of the destination extension's action list.

6. **Step 3**, which only occurs if the if statement is false (because Step 2 would have transferred the call to another extension), will control where the call goes outside of business hours. For this step select "**Transfer to Extension**" as the function and select **"After Hours Menu"** in the "**Which extension?**" list.

Step #3

Transfer to Extension ▪ ⬍

Which extension? — After Hours Menu ⬍

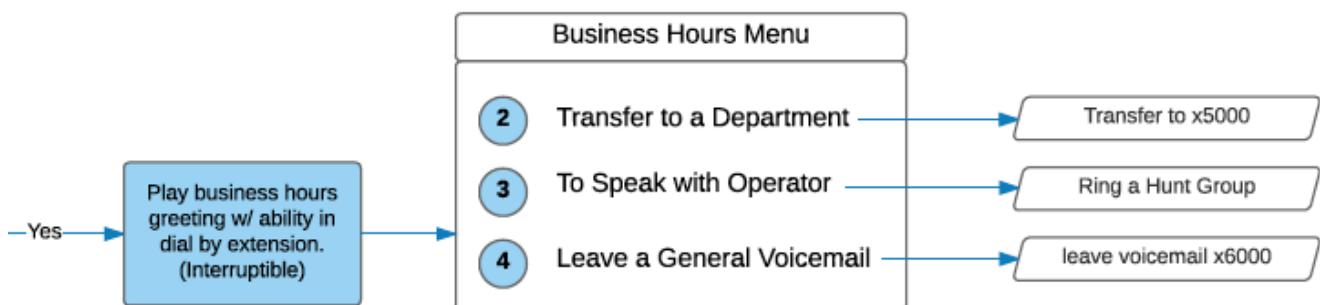After transferring, call is no longer controlled by this action list.

Caller will be sent to Step #1 of the destination extension's action list.

7. Click **Submit** to save the setup.

Setting the Inbound Behavior for the Business Hours Menu extension:

Now that the first extension is created which directs the call based on the time of day, the next step is to complete the other two extensions that will handle playing the greeting and listen for the caller to press buttons on their phone.

Let's start with the extension for the **Business Hours Menu**:

Business Hours Menu

Yes → Play business hours greeting w/ ability in dial by extension. (Interruptible) →

2 Transfer to a Department ——→ Transfer to x5000

3 To Speak with Operator ——→ Ring a Hunt Group

4 Leave a General Voicemail ——→ leave voicemail x6000

1. Open the "**Business Hours Menu"** extension and click **edit** in the inbound behavior area.

Inbound Behavior: Ring+Voicemail   Edit

2. Set **Step 1** to "**Play a recording**". And select the recording that was created for this greeting from the list.

   The greeting should include the audio instructions for the caller to press a number for the desired action. In our example, the greeting should say "Thank you for calling Our Company. For a department, press 2. To speak with the operator, press 3. To leave a voicemail, press 4."

   Step #1   Play a Recording

   To upload pre-made recordings, navigate to **Recordings**

   Which recording? Business Hours Greeting

3. Add a **Wait** command for step 2. This gives the caller a little time to make their decision after hearing all the options. Select "**Wait**" from the list and input the desired wait time in seconds. 2 to 5 seconds typically works well. If the caller does not select an option and there are no more steps, the menu will repeat the audio 3 times before hanging up.

   Step #2   Wait

   Wait for 5 seconds.

   If wait time is set to zero, wait for dialed input from caller.

4. At the bottom of the inbound behavior screen, there are two check boxes. Click the one called "**Allow caller to input a menu option during the above steps"**. This will display a list of buttons and what the actions for each are.

   ☐ **Allow caller to directly dial an extension number during the above steps.**

   ☑ **Allow caller to input a menu option during the above steps**

5. Select in **Button 2** the action "**Transfer to Extension**" and select the corresponding extension from the list (x5000 in our example).

   Button 2   Transfer to Extension ▪

   Which extension? [5000] Department Name

6. **Button 3** needs to ring a list of phones so the call can be received by a number of phones for pick up. Select "**Ring a Hunt Group**" for the main action. Select the premade hunt group from the second drop-down list and select the number of seconds to ring them. Check the box next to "**Force all members to ring regardless of availability**," which will ensure that phones ring even if someone is on another line. This is useful for receptionist positions, or anyone managing more than one call. If the Ring time expires, the caller will be sent back to the top of the Business Hours Menu. If this is not desired, you may need to create a separate Virtual Extension to receive the call, "**Ring a Hunt Group**" and then send it to an additional action such as a voicemail box.

Button 3   Ring a Hunt Group

Which hunt group? In-Hours Inbound Hunt Group

Ring for 24 seconds. (4sec/ring)

While ringing, the caller should hear:

Normal Ringing Sound

Note: Hunt groups only ring the devices or phones.
Actions assigned to extensions in the hunt group will not be performed.

☐ Skip to next step immediately if all hunt group members are unavailable.

☑ Force all members to ring regardless of availability.

☐ Disconnect if no answer

7. **Button 4** needs to be directed to a voicemail. Select the option "**Leave a Voicemail**" from the drop-down list. Select the desired extension voicemail from the list and check the box "**Disconnect call after voicemail has been left**".

Button 4   Leave a Voicemail ↑

For which extension? [6000] General Voicemail

☑ Disconnect call after voicemail has been left.

When finished, return to Step #1.

8. Add an option for an **invalid entry** at the bottom of the buttons list. A good option here may be to transfer the call back to the same extension, to form a loop. If the caller does not press any buttons the extension will start back at **Step 1**, three times.

The "Invalid Entry" action is performed if the caller presses a button that is not defined above.

Invalid Entry   Transfer to Extension ▪

Which extension? This Extension

9. Click **Submit** to save.

Setting the Inbound Behavior for the After Hours Menu extension:

The **"After Hours Menu"** extension, for the most part, is very similar to the in hours' control. Select the desired steps needed in the inbound behavior to match the flow chart. For our example, the final product should look like this:

When a call reaches this extension, perform the following actions:

▼ ✕   **Step #1**   [Play a Recording ⬍]

To upload pre-made recordings, navigate to **Recordings**

Which recording? [After Hours Greeting ⬍]

▲ ▼ ✕   **Step #2**   [Wait ⬍]

Wait for [5] seconds.

If wait time is set to zero, wait for dialed input from caller.

▲ ✕   **Step #3**   [-- Select an Action -- ⬍]

☐ **Allow caller to directly dial an extension number during the above steps.**

☐ **Allow caller to input a menu option during the above steps**

Button [1]   [-- Select an Action -- ⬍]

Button [2]   [Transfer to Extension ▪ ⬍]

Which extension? [[5000] Department Name ⬍]

Button [3]   [Leave a Voicemail ↑ ⬍]

For which extension? [[6000] General Voicemail ⬍]

☑ Disconnect call after voicemail has been left.

When finished, return to Step #1.

Routing the Numbers to the correct extension:

Once all the extensions are created and built, we must route the outside telephone number to the extension that will control the first behavior.

1. Click on **Numbers** on the left-hand side of the control panel.

Account #2555

Numbers ⬅

Extensions

Hunt Groups

Recordings

Hold Music

Schedules
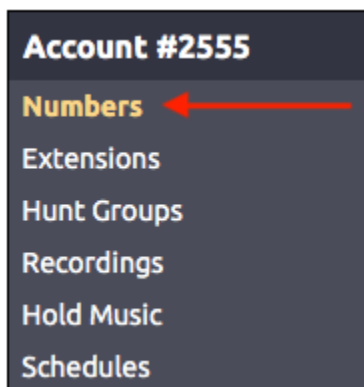
2. Find or search for the number in the list, and click on it to open its options page.

3. Locate the "**Route to extension:**" selection.

4. Select the extension made to control the call based on time called **"Inbound Routing"**.
5. Click **Submit**.

Test your call to make sure it works the way you want and make any needed adjustments.

This article is intended as a guide for the basic functions of setting up an auto attendant. With the flexibility of the NocTel system, you can make any menu system that you can dream up. We recommend that you start by drawing a flow chart, as it makes the process easier to visualize. If you need help in developing an auto attendant, please contact our support team at support@noctel.com

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