



Primus Hosted PBX

Auto Attendant Administration Guide

Document Version 1.2

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1 Overview – What is an Auto Attendant?

An auto-attendant (or automated attendant) is a term commonly used in telephony to describe a voice menu system that allows callers to be transferred to an extension without going through a telephone operator or receptionist. The auto-attendant is also known as a digital or virtual receptionist.

The Primus Auto Attendant allows you to process your incoming phone calls by allowing callers to self-direct their call to the options presented using a pre-recorded greeting. Your Auto Attendant can be used as a virtual receptionist, allowing callers to navigate your phone system or as an overflow and after-hours tool so that incoming calls are handled promptly and properly. By linking several Auto Attendants together, you can create very complex call flows to support almost every business case.

Because Auto Attendants can be linked together to create complex call flows, it is often helpful to have an idea of how you would like to greet callers and the flow you would like calls to take before beginning to configure your Auto Attendants. This document will help outline the initial setup, configuration, and various options available. For more advanced configurations, please contact the Primus Technical Support team.

2 Features

Each Auto Attendant allows you to map pre-defined digits (0-9, *, and #) to dial any phone number or extension within your organization. In cases where complex auto attendants are required, keys can also be mapped to other auto attendants giving you the ability to build multi-level IVR menus.

The Auto Attendant also has two modes – Business Hours and After Hours, allowing you to configure a different greeting and menu options for when your business is closed. The configuration of time based routing is explained in the “Global Options” section below.

In addition to the above, each Auto Attendant provides the following functions that can be mapped to a key.

2.1 Operator Dialing

The caller presses a pre-defined key to reach an operator. When this option is used, your callers will hear “Please wait while your call is transferred to the operator” and the call is transferred.

The option designated as ‘Transfer to Operator’ is the destination for any caller who fails to select an option within 10 seconds after the greeting has finished. If no operator is indicated, the call will be disconnected at that time. Only one option can be designated for the Transfer to Operator function per Auto Attendant.

2.2 Name Dialing

The caller spells the name of the intended party using the numerical keypad. Upon identifying a unique match, the caller is played the name of the called party, and is then transferred. There are two options for how dial by name entries are matched to your organization – “LastName + FirstName” or “LastName + FirstName and FirstName + LastName.”

It is important to note that the name in the directory will be based on your user’s caller ID settings, not their account name (i.e., Jennifer’s outbound caller ID reads ‘Accounting Dept’ rather than ‘Jennifer Reed;’ ‘Dept’ is what will be used for her last name lookup).

If more than one name matches the name dialed, the system will play the matching names and prompt the user to select which one to dial.

2.3 Extension Dialing

The caller enters the extension of the intended party through the numerical keypad. Upon collecting the full extension, the caller is played the name of the called party, and is then transferred.

2.4 Transferring Calls

The auto attendant allows you to define a key that will transfer the caller to an internal phone number or extension. When using the transfer feature the Auto Attendant has two options: “Transfer With Prompt” and “Transfer Without Prompt.” The key difference between the two options is that when “Transfer with Prompt” is used, callers will hear “Please wait while your call is transferred” before the transfer.

2.5 Repeat Menu

This option allows the caller to repeat the Auto Attendant greeting.

2.6 Exit

This option allows the caller to end the call and hang up. After selecting this option, the caller will hear “Thank you for calling” before the call is released.

3 Options

The auto attendant has several options you can configure to customize how it operates.

3.1 Global Options

The “Global Options” of the Auto Attendant are configured inside the “Profile/Options” tab of the Primus Voice Portal.

3.1.1 Business Hours & Holiday Hours

If your business is not open 24/7, you can create a business hours schedule in the “Schedule and Events” section of the portal. Once a time schedule that defines your hours of operations has been created, it can be applied as a time schedule to your Auto Attendant. Outside business hours, callers hear the after-hours greeting and dialing options. You can also define a holiday schedule for days your business is closed. On a scheduled holiday, callers hear the after-hours greeting and dialing options.

3.1.2 Time Zone

This option lets you specify the time zone in which you want this auto attendant and connected hours of operation to operate.

3.1.3 Language

The language option lets you choose the language in which any system generated prompts are played back to the calling party. System generated prompts include things such as dial by name or transfer with prompt where the system will play back the message in the selected language.

3.1.4 Name Dialing Scope

This option allows you configure how the dial by name option works. By default, the system works by “LastName, Firstname,” so if a caller was looking for John Smith, they would select the option for dial by name and then start dialing 764 (SML) until the system found a unique match for John Smith, at which time the caller is played the name of the matched person (John Smith) and is then transferred. If you want people to be able to search by first name as well, you can select the option for “Last, First or First, Last” which will attempt to match the callers input to either John Smith or Smith, John. Note that enabling the option for “Last, First or First, Last” may result in callers having to dial more digits before they match someone within your organization due to the potential increase in the number of matches.

3.2 Business and After Hours Options

For each menu in the Auto Attendant (Business Hours and After Hours), there are several options you can set in addition to mapping digits to extensions or function.

3.2.1 Immediate Extension Dialing

By enabling the “Extension Dialing” option for an auto attendant, you give callers the ability to dial any extension in your organization from the auto attendant without selecting any additional options. If your organization utilizes extensions, it is suggested you turn this option on for your main auto attendant to make it easier for outside callers to reach people.

3.2.2 Greeting

By default, the system will play a “Default Greeting.” When the default greeting is selected, callers hear a greeting similar to the following:

“Welcome. Your call is being answered by an automated attendant. If you know your party’s extension, press 1. To use our automated name directory, press 2. If you would like to speak with an operator, press 0. Thank you for calling.”

If you also have the “Extension Dialing” option selected, then the default greeting will follow the greeting above with:

“If you know the extension of the party you are trying to reach, dial it now.”

Since the default greeting is a generic system recording and does not include your company name, you also have the option to select a “Custom” greeting and upload an audio file to be used. There are two options for customizing this greeting: uploading a file from your PC or recording a greeting from your phone.

3.2.3 Uploading A Custom File

When uploading a custom audio file, the following file format should be used:

- CCITT u-Law or A-Law
- 8.000 kHz
- 8 bit Mono
- .WAV file type

Note that the maximum audio length for Auto Attendant greetings is 5 minutes. In the web portal, select “Choose File,” give your file a description, such as “Main Menu,” and then select upload.

3.2.4 Recording an Auto Attendant Greeting from your Phone

Before you can record an auto attendant greeting from your phone, you need to assign a numeric password to the voice portal. To do this, navigate to the “Voice Portal” section of the “Admin Settings” in the online management portal at <https://voice.primus.ca>. From this page, enter a new numeric password under “Reset Administrator Password” and click “Save.”

NOTE: On the same page in the online management portal, make note of the extension assigned to the voice portal, as you will need it in the next step.

Once a password has been set, you can dial your voice portal via the extension number seen on the “Voice Portal” section in the online management portal as mentioned above.

If you have voicemail assigned to the line you are calling the voice portal from, you will hear a prompt to enter your password. Press * to skip this prompt and exit to the voice portal main menu.

From this menu, re-enter the extension of your voice portal and when prompted, enter the password you set above in the online management portal.

You will now be able to record the business and after hours greetings for your auto attendants by following the prompts.