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Training anSwitch V7

AUTO-ATTENDANT PORTAL – DIAL-IN BY NAME

Classification: For Internal Use
Status: Preliminary
Version: E0.7
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INTRODUCTION & MOTIVATION

This training covers the topics:

- ▶ Activating the dial-in per name for a PBX Member
- ▶ Call routing toward the auto-attendant portal

After this training, the trainee is enabled:

- ▶ To activate dial-in per name for a PBX Member
- ▶ To configure the access to the auto-attendant portal

IT'S NOT MAGIC

IT'S "KNOW HOW"

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1   OVERVIEW OF AUTO-ATTENDANT - DIAL-IN BY NAME

OVERVIEW OF AUTO-ATTENDANT - DIAL-IN BY NAME

▶ The "Dial-in by Name" function allows the caller to dial the desired person by entering the name (instead the number) of the called via the phone keypad.

a. The caller dials the publicly announced telephone number of the PBX via which the desired person can be reached.

b. The caller will be connected to the Auto-Attendant portal of the PBX.

c. The caller will be prompted by the auto-attendant to enter the name of the called.

d. The caller wants to talk to "Tom", so the caller presses on the phone keypad: 8 → T, 6 → O and 6 → M

e. If the auto-attendant has not found more than 5 matching internal destinations, it plays the recorded names or tells their internal numbers and tells you which key to press to be connected to the respective destination.

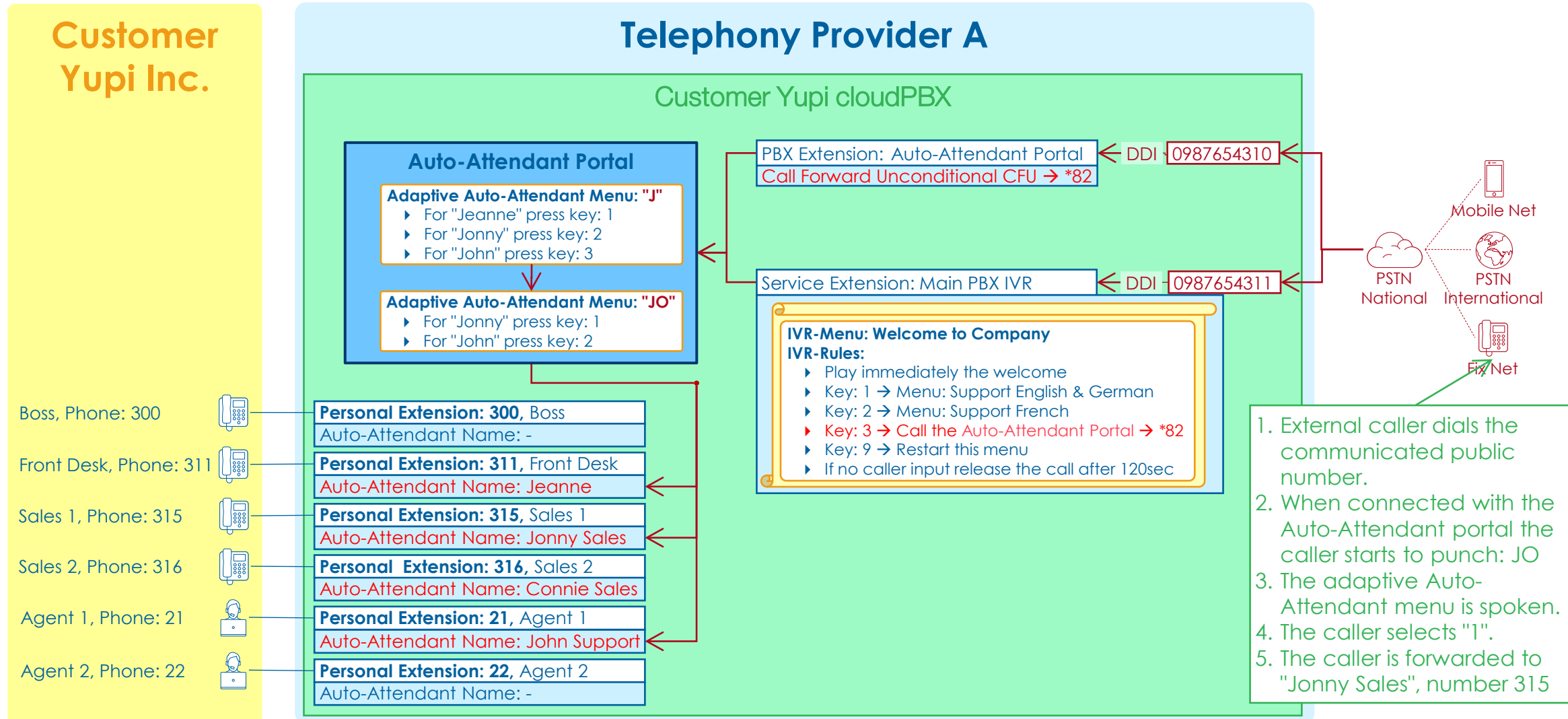f. The caller presses the desired key, and the destination will be called.

OVERVIEW OF AUTO-ATTENDANT - DIAL-IN BY NAME

▸ For using the Auto-Attendant feature the Operator or PBX Administrator must:

    ▸ Define and publish the public number of the auto-attendant of the PBX.

    ▸ Define a PBX Extension as "Auto-Attendant Portal" and assign the defined public number as DDI to it.

    ▸ In the PBX Extension configure a CFU call forward to service *82.

▸ A PBX member that shall be reachable via the auto-attendant must:

    ▸ Define and configure the dial-in name in the PBX Extension

        ▸ Best practice: the PBX Administrator coordinates the names.

    ▸ Record the name directly or upload a recording to the PBX Extension.

        ▸ If no recording is available, then the internal number is spoken

OVERVIEW OF AUTO-ATTENDANT - DIAL-IN BY NAME

Customer Yupi Inc.

Telephony Provider A

Customer Yupi cloudPBX

Auto-Attendant Portal

Adaptive Auto-Attendant Menu: "J"
- For "Jeanne" press key: 1
- For "Jonny" press key: 2
- For "John" press key: 3

Adaptive Auto-Attendant Menu: "JO"
- For "Jonny" press key: 1
- For "John" press key: 2

PBX Extension: Auto-Attendant Portal
Call Forward Unconditional CFU → *82

DDI - 0987654310

Service Extension: Main PBX IVR

DDI - 0987654311

IVR-Menu: Welcome to Company
IVR-Rules:
- Play immediately the welcome
- Key: 1 → Menu: Support English & German
- Key: 2 → Menu: Support French
- Key: 3 → Call the Auto-Attendant Portal → *82
- Key: 9 → Restart this menu
- If no caller input release the call after 120sec

Mobile Net

PSTN National

PSTN International

Fix Net

Boss, Phone: 300

Personal Extension: 300, Boss
Auto-Attendant Name: -

Front Desk, Phone: 311

Personal Extension: 311, Front Desk
Auto-Attendant Name: Jeanne

Sales 1, Phone: 315

Personal Extension: 315, Sales 1
Auto-Attendant Name: Jonny Sales

Sales 2, Phone: 316

Personal Extension: 316, Sales 2
Auto-Attendant Name: Connie Sales

Agent 1, Phone: 21

Personal Extension: 21, Agent 1
Auto-Attendant Name: John Support

Agent 2, Phone: 22

Personal Extension: 22, Agent 2
Auto-Attendant Name: -

1. External caller dials the communicated public number.
2. When connected with the Auto-Attendant portal the caller starts to punch: JO
3. The adaptive Auto-Attendant menu is spoken.
4. The caller selects "1".
5. The caller is forwarded to "Jonny Sales", number 315

2   CONFIGURE THE AUTO-ATTENDANT NAME OF A PBX EXTENSION

CONFIGURE THE AUTO-ATTENDANT NAME OF A PBX EXTENSION

▶ **Login as PBX Administrator, Department Administrator or PBX Member**

> Menu: PBX
> > Sub-Menu: Extension
> > > Select the desired PBX Extension e.g.: Front Desk

1. **Configure the name to dial**

   > In tile "Dial by Name" configure parameter:
   > ▶ "Auto-Attendant Name, e.g.: Jeanne

2. **Upload or record a prompt audio file which contains the spoken name** (or any information)

   > Click button: Upload

   either
   > Upload the audio file, click button: + Upload

   or
   > Record the prompt by dialing the service number e.g.: *81146

   Note   If no prompt is loaded, then the internal number of the PXB Extension is spoken.

Extension Related Features 311 ☎

🗎 Extensions   ⚙ Extension Setup

💾 Save

Call Forwarding

Unconditional	VoiceMail	⬤
On Busy	VoiceMail	⬤
		Delay
No Reply	VoiceMail	15 ⬤
Call Failed	VoiceMail	⬤

Account

Do Not Disturb	⬤
Suppress own Number	⬤
Reject Anonymous Calls	⬤
Call waiting	⬤
Distribution Mode	All Phones ⌄

Assigned Phones

+ New Phone   + Add Phone   ✕ Delete

☐	Phone Name	Registration Status
☐	Front Desk-Yealink T48G	🟢
☐	Boss Office -Yealink T21P E2	🔴

VoiceMail Box

Set PIN		👁
Call back allowed	⬤	
Send message by e-mail	⬤	

Upload

Dial By Name

Auto-Attendant Name	Jeanne

Upload   ▶ 0:00 / 0:01 ━ 🔊 ⋮

Delete

Dial By Name Prompt *81   ✕

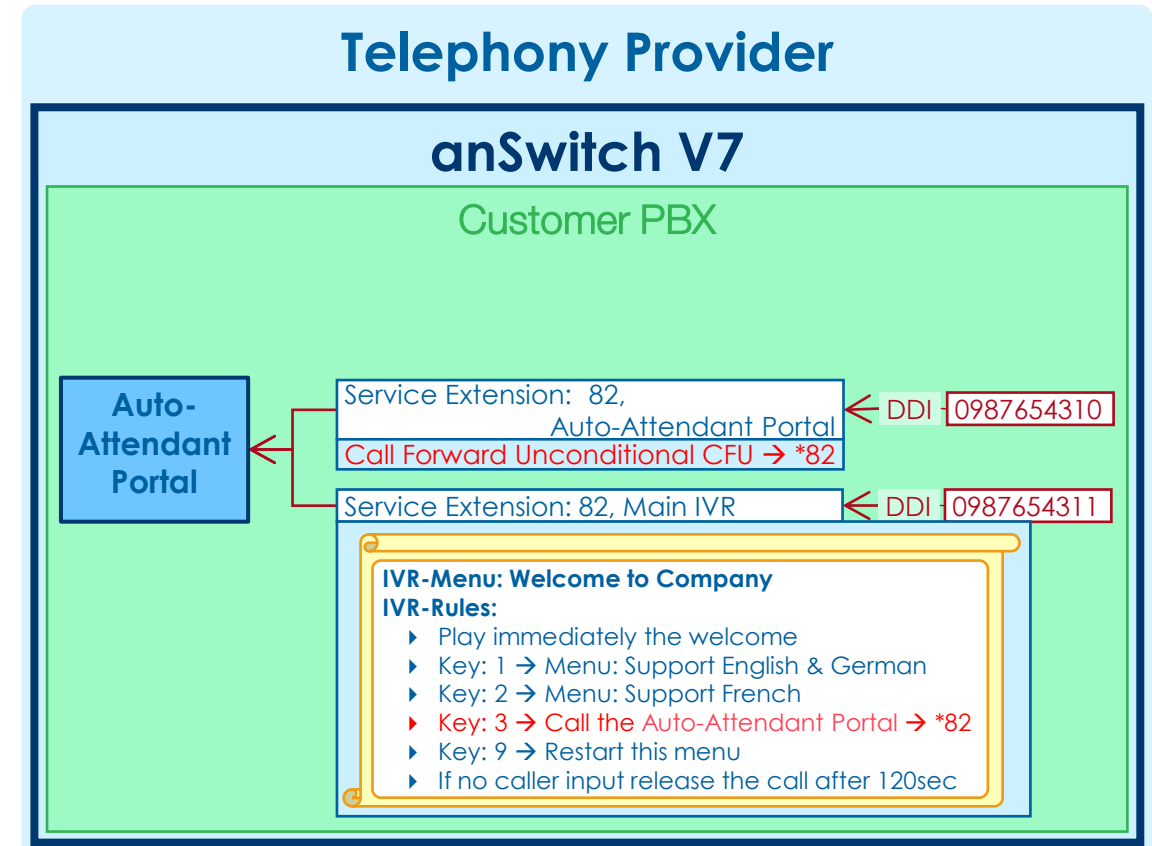Service number to modify the prompt   *81146

▶ 0:00 / 0:01 ━━━ 🔊 ⋮

+ Upload...

3   CONFIGURING THE ACCESS TO THE AUTO-ATTENDANT PORTAL FOR EXTERNALS

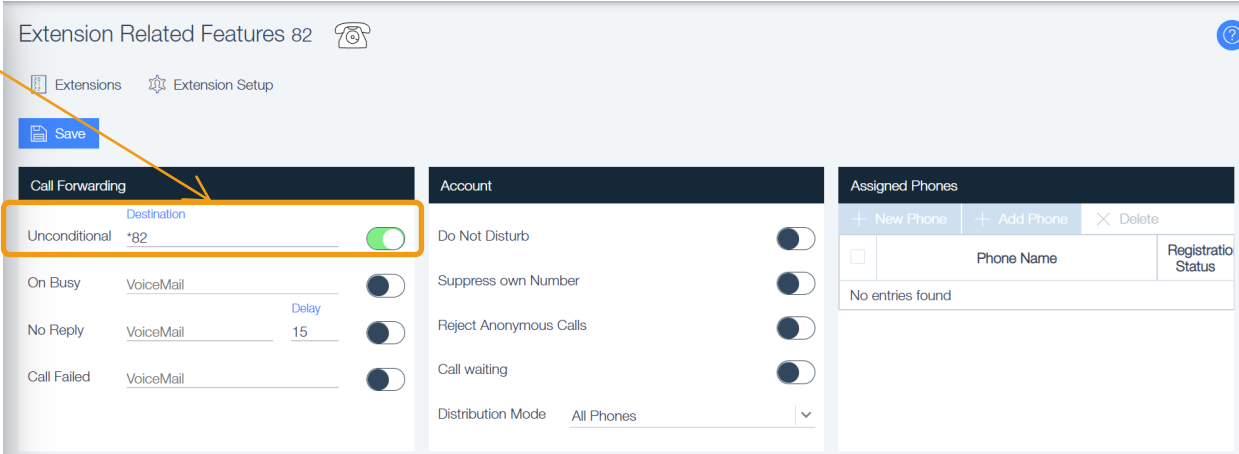# PRINCIPLE FOR ACCESSING THE AUTO-ATTENDANT PORTAL FOR EXTERNALS

▶ Automatic access to the auto-attendant portal for external callers is based on the principle that incoming calls to defined public PSTN numbers of the PBX are forwarded to the Auto-Attendant service number: ***82**

▶ Public numbers for the auto-attendant portal access can be defined and concurrently configured by the:

   ▶ PBX Administrator on PBX level

Telephony Provider

anSwitch V7

Customer PBX

Auto-Attendant Portal

Service Extension: 82,
                    Auto-Attendant Portal
Call Forward Unconditional CFU ➔ *82

← DDI : 0987654310

Service Extension: 82, Main IVR

← DDI : 0987654311

IVR-Menu: Welcome to Company
IVR-Rules:
   ▶ Play immediately the welcome
   ▶ Key: 1 ➔ Menu: Support English & German
   ▶ Key: 2 ➔ Menu: Support French
   ▶ Key: 3 ➔ Call the Auto-Attendant Portal ➔ *82
   ▶ Key: 9 ➔ Restart this menu
   ▶ If no caller input release the call after 120sec

FORWARDING VARIANT: UNCONDITIONAL CALL FORWARDING CFU

▶ Forward incoming calls from the PSTN
with Unconditional Call Forwarding CFU:

1. Create a PBX service extension e.g.:
"82, Auto-Attendant Portal"

2. Assign the defined PBX public
number as DDI to the PBX extension.

3. Configure and activate
Unconditional Call Forwarding to
the Auto-Attendant portal service
number: *82

FORWARDING VARIANT: IVR-RULE WITH CALL FORWARDING

▶ Forward incoming calls from the PSTN
with an IVR-Rule with Call Forwarding:

1. Use an existing suitable IVR-menu
   and add new IVR-Rule.
   or
   create a new PBX service extension
   e.g.: "82, Auto-Attendant Portal" with
   a new IVR-menu.

2. Configure an IVR-rule that forwards
   the caller to the Auto-Attendant
   portal service number: *82

LAST PAGE

Date	Doc-ID	Description	Changes
26.2.2024	training_as7_408_auto_attendant_e07	Better description of the caller activity.	Page 6, 7