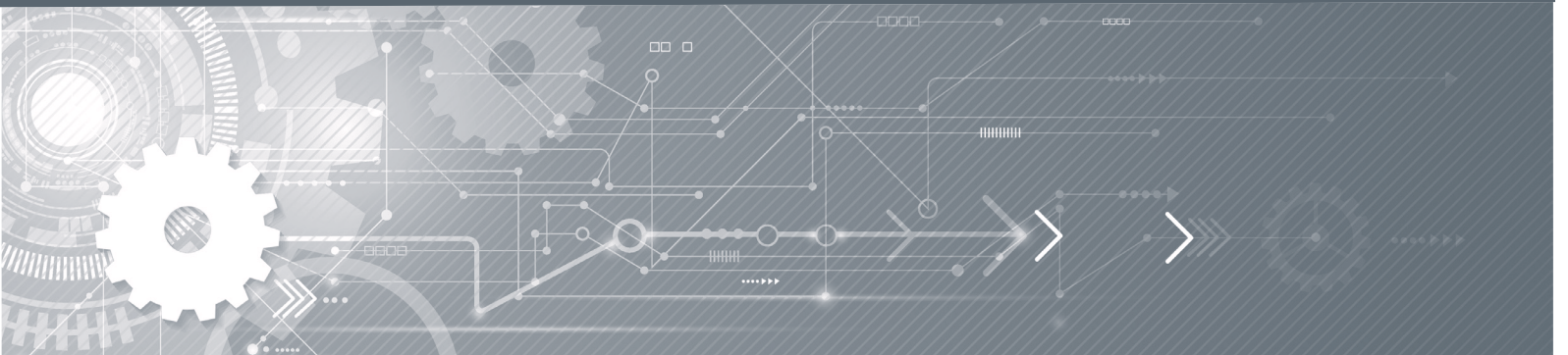




# DirectLink

## Easy Attendant User Guide





# Table of Contents

<b>Introduction to Easy Attendant .....</b>	<b>2</b>
<b>Setting Up Easy Attendant for the First Time.....</b>	<b>2</b>
<b>Configuring Your Easy Attendant Menu(s) .....</b>	<b>3</b>
<b>Configuring the Extensions Callers Can Dial .....</b>	<b>5</b>
<b>Business Group Extensions .....</b>	<b>5</b>
<b>Additional Extensions .....</b>	<b>6</b>
<b>Configuring Your Business Hours .....</b>	<b>7</b>
<b>Turning Easy Attendant On/Off .....</b>	<b>7</b>
<b>Forwarding Calls when Easy Attendant is Turned Off.....</b>	<b>7</b>
<b>Switching Between Schedule/Single Menu Modes .....</b>	<b>8</b>
<b>Switching from Single Menu Mode to Schedule Mode.....</b>	<b>8</b>
<b>Switching from Schedule Mode to Single Menu Mode.....</b>	<b>9</b>
<b>Recording Announcements or Your Initial Greeting .....</b>	<b>9</b>
<b>Recording Messages Directly From Your Computer.....</b>	<b>9</b>
<b>Recording Messages Using Your Telephone .....</b>	<b>10</b>
<b>Recording a Message.....</b>	<b>10</b>
<b>Troubleshooting.....</b>	<b>12</b>

## Introduction to Easy Attendant

Easy Attendant is an automated receptionist service. When turned on, it answers your calls automatically, and offers your callers a list of options (a “menu”) that you define. You can allow your callers to listen to messages (such as your opening times), to leave a message, or to be transferred to a real person.

### For example:

*Welcome to Bob’s Tires. We are open for business right now. To hear directions to our store, press 1. To hear our business hours, press 2. If you know the extension of the person you require, press 3, and then enter the extension followed by the pound key. Or, for any other inquiries please press 0.*

If you wish, you can offer your callers different menus depending upon whether you are currently open or not. For example, when Bob’s Tires is closed, they might offer this menu instead:

*Welcome to Bob’s Tires. Unfortunately we are currently closed. To hear directions to our store, press 1. To hear our opening hours, press 2. If you wish to leave a message, press 3, and we will get back to you as soon as possible.*

Once you have told Easy Attendant the hours and days that you are open, it will automatically play callers the correct menu depending on when they call.

## Setting up Easy Attendant for the First Time

**Step 1.** Go to <https://myvoice.directlink.coop> and login to Easy Attendant with the telephone number and password provided to you at the time of installation.

**Step 2.** Choose whether to offer your callers different menus during business hours and outside of business hours. The first time you configure Easy Attendant, you will be asked to make this choice. If you have already been asked, and now wish to change your mind, see “Switching Between Schedule/Single Menu Modes” section before you follow the rest of these instructions.

**Step 3.** Optionally, configure a number to forward callers to while your Easy Attendant is turned off. If you skip this step, then until you have finished setting up the service, callers to your Easy Attendant will be played a message saying that the number is unreachable.

**Step 4.** Configure the menu (or menus) that you wish to offer your callers.

**Step 5.** If (in Step 3) you chose to offer the option to dial by extension or name, configure the extensions your callers can dial.

**Step 6.** If (in Step 1) you chose to use different menus during business hours and outside of business hours, configure your business hours.

**Step 7.** Turn on Easy Attendant.



## Configuring your Easy Attendant menu(s)

Your Easy Attendant menu configuration determines what options your callers are offered, and what announcements they hear.

If you have chosen to offer different options during business hours and outside of business hours, you will need to configure two separate menus: your "Business Hours Menu" and your "Non-Business Hours Menu". If you have chosen to offer the same options at all times, you will need to configure a single "Easy Attendant Menu". In each case, you can select the menu or menus you need to configure using the corresponding tabs at the top of your Easy Attendant page.

### The configuration for an Easy Attendant menu consists of the following:

- An initial greeting that you must record. This is the first thing that callers hear when your Easy Attendant answers the call. This initial greeting welcomes your callers, and tells them what options are available -- for example:

*"Welcome to Bob's Tires. We are open for business right now. To hear directions to our store, press 1. To hear our business hours, press 2. If you know the extension of the person you require, press 3, and then enter the extension followed by the pound key. Or, for any other inquiries please press 0."*

- Details of what should happen when a caller selects a particular option. For example, as part of setting up the Easy Attendant for Bob's Tires, you would configure key 1 to play an announcement and then record the announcement giving directions to the store.

### The following instructions describe how to set up your Easy Attendant menu.

If you have separate business and non-business hours menus, you will need to repeat these steps for each of them.

**Step 1.** Navigate to the menu configuration screen by clicking on the appropriate tab (as described above).

**Step 2.** Configure the options that you want to offer to your callers.

The menu configuration screen lists the keys 1-9 . Alongside each key, you will see a dropdown box, which you can use to select what will happen when a caller presses that number on their phone.

For each option that you wish to offer your callers, decide which key they will press to access it, and select the appropriate option from the corresponding dropdown. For example, if you want to play an announcement describing your business hours when a caller presses 2, you would assign key 2 to "Play announcement".

**For each key, you can choose from the following options.**

- **Unassigned.** If a caller presses this key, they will be told that the option is not recognized.
- **Play announcement.** If a caller presses this key, they will be played a message that you have recorded. If you assign a key to “Play announcement” you must also record the announcement you want to play, either by clicking on the record that appears to the right of the dropdown, or by dialing the appropriate service access number from your telephone. See “Recording Announcements or Your Initial Greeting” Section.
- **Transfer to phone.** If a caller presses this key, they are transferred to a phone number of your choice. For example, you might want to allow callers to “press 4 to speak to a sales representative”. You must also enter the phone number you wish to transfer to in the box that will appear to the right of the dropdown. Enter the phone number exactly as you would dial it from a phone.
- **Dial by extension.** If a caller presses this key, they can choose who they want to speak to within your organization by dialing an extension number. If you assign a key to dial by extension, you must also do the following.
  - ▶ Define the set of extensions that your callers can enter and the phone numbers that each will transfer to. Note: do not attempt to do this until you have finished configuring your menu, and have applied your changes in step 4.
  - ▶ Give your callers suitable instructions as part of your greeting (which you will record in step 3 below). For example, if you assign key 4 to dial by extension, then your initial greeting should include wording similar to: “if you know the extension of the person you require, press 4, and then enter the extension followed by the pound key.”
- **Dial by name.** If a caller presses this key, they can choose who they want to speak to within your organization by dialing their name. If you assign a key to dial by name, you must also do both of the following.
  - ▶ Define the set of extensions that your callers can enter, their names and the phone numbers that each will transfer to. Note: do not attempt to do this until you have finished configuring your menu, and have applied your changes in step 4.
  - ▶ Give your callers suitable instructions as part of your greeting (which you will record in step 3 below). For example, if you assign key 4 to dial by name, then your initial greeting should include wording similar to: “if you know the name of the person you require, press 4, and then enter the name followed by the pound key.”
- **Transfer to voice mail.** If a caller presses this key, they will be transferred directly to a voice mailbox of your choice and invited to leave a message. For example, you might want to allow callers to “press 5 to leave a message for one of our sales team”. You must also enter the phone number of the mailbox you wish to transfer to in the box that will appear to the right of the dropdown. The number you enter must be the 10 digit phone number of a mailbox on this system.



**Step 3.** Record your initial greeting either by clicking on record in the “Record initial greeting” panel, or by dialing the appropriate service access number from your telephone. See recording announcements. Your initial greeting should describe all of the options that your callers can select - so it should mention each key that you have set to something other than “unassigned” in step 2.

**Step 4.** Apply the changes you have made to your menu configuration by pressing the Apply button at the bottom of the screen.

After you have set up your configuration, you can change it at any time by reassigning keys or updating announcements. If you change the options that you offer to your callers, remember to re-record your initial greeting as well!

## Configuring the Extensions Callers Can Dial

If you have chosen to offer your callers a “dial by extension” or “dial by name” option, then you can configure the set of extensions they can dial in two ways:

### Business Group Extensions

Business Group extensions are the list of lines within your Business Group. A list of all extensions in your Business Group is displayed in the “Business Group Extensions” tab. You can configure which extensions are exposed to callers as follows:

- For each extension, you can select whether or not to include it in the list available to callers.
- Any new lines added to the Business Group will automatically be included in or excluded from the set available to callers, based on the “Automatically include new extensions as they are added to the Business Group” setting.

Lines available within the Business Group which are available to callers appear in bold. Any available line will automatically be available to any Dial by Extension or Dial by Name actions.

To include selected lines in Dial by Name actions, you need to make sure that a name recording is available for that line. The name recording can come from one of two places:

- You may record or upload a name recording by clicking on the “record” link for the line.
- If the line already has a name recorded for voice mail, then this can be used as the name recording for callers.

Lines with no name recorded have a red “record” link displayed which allows you to record a Business Group name recording for that line.

Lines using the voice mail spoken name have a green “override” link displayed. This link allows you to record a Business Group name recording for the line to be used in preference to the voice mail name recording.

Lines with a Business Group spoken name recorded have a green “listen/change” link displayed, allowing you to listen to your current recording and delete it or replace it with a new recording.

If a given line has both name recordings available, then the one you have recorded for use in this business group will be used in preference.

## Additional Extensions

To use additional extensions, you must define the set of extensions which callers can dial. For each extension, you must specify the extension number (a short number of your choice, such as 107), the extension’s name and the phone number that your caller should be transferred to if they dial this extension.

To configure your extensions click on the Additional Extensions tab at the top of the Easy Attendant page.

To add a new extension, click the “Add Extension” button. You will then be prompted for the following:

- **Extension.** This is the extension number that your callers will dial. It can be any number of your choice between one and seven digits long. It must not be the same as any other extensions you have already configured.
- **Name.** This is the name that your callers will dial. Both the first and last name must contain at least 2 dialable characters.
- **Telephone Number.** This is the number that callers will be transferred to if they dial this extension. Enter the phone number exactly as you would dial it from a phone (although note that business group short codes and extension codes are not permitted).

You will also be prompted to record a spoken name for this extension. This is played to callers if they enter a name that is not unique to allow them to refine their search. For example, if there are two extensions called “John” and the caller enters “John”, they hear the full names of both the extensions and can choose between them. Extensions that don’t have a spoken name recorded can’t be reached by “dial by name” options.

*Note: refer to the section “Recording a Message” for more information.*

To delete existing extensions, select the check box alongside the extension you wish to delete, and then press the “Delete Selected” button.





## Configuring your Business Hours

If you have chosen to offer your callers different options during business hours and outside of business hours, you must configure a business hours schedule. This tells Easy Attendant what your business hours are, so that it can automatically offer callers the correct menu based on when they are calling. To configure your schedule, navigate to the Schedule tab at the top of the Easy Attendant page.

There are two parts to configuring your schedule:

- Configure your normal business hours, for each day from Monday to Sunday. To do this, simply “color in” the grid with the hours that you work by clicking on the appropriate cells. Clicking on a cell in the grid toggles it between business hours and non-business hours. You can change several cells at once by clicking and dragging.
- Configure any special one-off dates when your business will be closed. To do this, click on the calendar icon to bring up the calendar control, and select dates when you will be closed by clicking on them. If you always close on public holidays, you can easily select all of these by clicking on the “Add public holidays” button.



When you have finished, press “Apply” to save your changes.

## Turning Easy Attendant On/Off

To turn your Easy Attendant on or off, navigate to the Main tab at the top of the Easy Attendant page, and click on the button labeled Turn ON or Turn OFF.

When your Easy Attendant is turned off, callers will either be played an announcement telling them that the number is unreachable, or forwarded to a number of your choice. Many users will leave their Easy Attendant turned on all of the time, but (depending upon how Easy Attendant has been deployed) you may, for example, wish to turn Easy Attendant off during the day and forward your callers directly to a live receptionist instead.

## Forwarding Calls When Easy Attendant is Turned Off

When your Easy Attendant is turned off, you can choose either for callers to:

- be played a message telling them that the number is unreachable
- be forwarded to an alternative number.

To change this setting, your Easy Attendant must first be turned off. The text at the top of the Main Easy Attendant tab will then read either “Your Easy Attendant is currently OFF and callers will be told that this number is unreachable”, or “Your Easy Attendant is currently OFF and callers are being forwarded to <number>”. To change the current setting, click on the link included in this message.

## Switching Between Schedule/Single Menu Modes

Easy Attendant has two different modes.

- Schedule mode. In schedule mode you set up two separate menus -- one for use during business hours, and one for outside of business hours. The system then automatically plays the correct menu to a caller depending on when they call. For example, during business hours you might want to offer your callers a choice of people to speak to. Outside of office hours, you might instead want to offer the option of leaving a message.
- Single menu mode. In single menu mode, you set up just one menu. All callers will hear the same menu regardless of the time of day.

You can switch between these modes at any time.

## Switching From Single Menu Mode to Schedule Mode

- Navigate to the Main tab at the top of the Easy Attendant page.
- If Easy Attendant is currently turned on, you must turn it off (by clicking on the "Turn OFF" button) before proceeding. The service will be turned off for a while as you set up your new configuration, so you may wish to forward callers to an alternative number while you carry out the rest of this procedure.
- Click on the "Switch to using a schedule" link.
- In schedule mode, you will have two separate menus - one for use during business hours and one for during non-business hours. If you have already defined a menu (when running in single menu mode) you can keep this and use it as the starting point for one of the two menus you will be using from now on. You can, of course, subsequently change it if required.
- You are now running in schedule mode. Before you can turn Easy Attendant on again, you must configure your business hours menu, your non-business hours menu and your schedule. This is very similar to setting up Easy Attendant for the first time, except that you may already have some configuration for one of your menus.



## Switching From Schedule Mode to Single Menu Mode

**Warning:** In schedule mode, you have two separate menus -- one for use during business hours and one for use during non-business hours. Switching to single menu mode will cause one of these menus to be permanently deleted (you can choose which one you wish to keep). Switching to single menu mode will also permanently delete any business hours schedule you have configured. If you subsequently wish to return to schedule mode, you will need to set these up again.

- Navigate to the Main tab at the top of the Easy Attendant page.
- You may wish to turn Easy Attendant off, and optionally forward callers to an alternative number while you carry out the rest of this procedure.
- Click on the “Switch to using a single menu” link.
- If you had previously set up both your business hours menu and your non-business hours menu, you will be asked which one you wish to keep. The other menu is permanently deleted.


## Recording Announcements or Your Initial Greeting


When using Easy Attendant, all messages that are played to your callers must be recorded by you in advance. At the very least, this requires you to record an initial greeting, but you may also wish to record a number of other announcements giving your callers information such as your opening hours. See [Configuring your Easy Attendant menus](#).

Easy Attendant offers two ways to record your messages.

- If your computer has a sound card and microphone, you can use these to record your messages directly from the Easy Attendant configuration pages.
- Alternatively, if you do not have the necessary equipment (or if you simply prefer), you can record your messages using your telephone.

## Recording Messages Directly From Your Computer


Anywhere you see record  you can click on the link to bring up the announcement recording control. This allows you to record your message directly via your computer’s microphone.

Once you have recorded a message, the record  will change to listen/change. Clicking on this will again bring up the announcement recording control, which will enable you to play back, and if you wish, overwrite your recording.

*Note: Refer to the section “Recording a message” for more information.*

## Recording Messages Using Your Telephone

If you wish to record your initial greeting and announcements using a telephone:





- Follow the instructions above for setting up your Easy Attendant menu, but don't click on any of the record  links that appear.
- Once you have configured your menu options, press "Apply" as usual to save your changes. You will be warned that you have not yet recorded an initial greeting, and if you have assigned any keys to "Play announcement", you will also be warned that you have not recorded the announcements to play. Ignore this warning.
- Dial your Easy Attendant service access number from your telephone, press \*6 when the announcement begins and select the appropriate options from the menu you will hear. You will be given the opportunity to record your initial greeting, as well as the announcements for any 'Play announcement' keys you have set up.

**Note:** If you wish to offer your callers the option to listen to announcements in your Easy Attendant menu, you must use the Web interface to assign the appropriate keys to "Play announcement" before you can use your telephone to record the announcements you wish to play.

## Recording a Message


A number of controls are provided for recording your message.

**Note:** Adobe Flash is required for recording and playing audio content through the web interface.

-  Starts recording. This will overwrite any message you have previously recorded.
-  Stops recording the message.
-  Plays back your recorded message. This action will be unavailable if you have not yet recorded a message.
-  Stops playing the message.





These controls allow you to adjust the gain of your microphone. Click the microphone icon then adjust the vertical slider to set the required volume level. While recording, the  lights above this control will show how loud the signal is from your microphone. If the gain is set correctly then several green lights should appear while you are recording. If only one or two appear, then the gain is set too low and your message will be too quiet. If red lights appear then the gain is set too high and your message will be distorted.







This control allows you to adjust the playback volume. Click and then adjust the slider to set the required volume level.




This control allows you to view and change your Adobe Flash Player Settings. This includes, for example, the ability to adjust the settings for your microphone. When you first attempt to record a message, an "Adobe Flash Player Settings" overlay will appear. Ensure that the "Allow" radio button is selected, and if you do not wish to be shown these settings in future tick the "Remember" check box.

### To record a message you need to carry out the following steps:




- When you are ready to record your message, press the  button.
- Read your message into your microphone, and when you have finished, press the  button.
- Playback your message to check that it has recorded correctly by pressing the  button. If you want to stop the playback, press . If there is a problem with the recording, e.g. you cannot hear it, or it is very quiet, see the section on Troubleshooting below.
- If you are not happy with your message content, then record a new message by pressing the record button again. This will overwrite your previous message.

## Troubleshooting

### I have recorded my message, but when I try to play it back I cannot hear anything

- Check you have actually recorded something. The length of the current recording is shown in the following format: 0:01:35 (1 minute and 35 seconds). If the current recording length is 0 or much lower than expected, then try recording your message again.
- Check that playback volume is turned up high enough. Volume can be adjusted using the volume slider described above.
- Try re-recording the message, and as you are recording, watch the  lights on the player.


### If no lights appear, or only one or two appear, then check the following.

- Increase the gain of your microphone by clicking  and moving the gain control slider nearer to the top end.
- Click the  icon to bring up the “Adobe Flash Player Settings” and make sure that the Allow option is selected. Click on the microphone icon at the bottom of this settings box and check that the correct microphone is selected in the dropdown, and that the record volume is turned up. 
- If you are using an external microphone, check that this is plugged in correctly.

If this still doesn't solve the problem, then it may be that your microphone has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.

- If several green lights appear consistently while recording your message, then it is likely that your message has recorded correctly and the problem is occurring when playing it back. If you are using external speakers, check that these are plugged in correctly and turned on. If this does not resolve the problem, then it may be that your speaker has been muted by the operating system (e.g. Windows) - refer to your operating system help for further information.

### I have recorded my message, but when I try to play it back it is distorted

This may be because your microphone gain is set too high. Reduce the gain by clicking  and moving the slider gain control nearer to the bottom.







[sales@directlink.coop](mailto:sales@directlink.coop) • [directlink.coop](http://directlink.coop) • 503.266.8111 • 503.845.2291

*Canby*

*Mt. Angel*