

# Access One Easy Attendant Quick Reference Guide

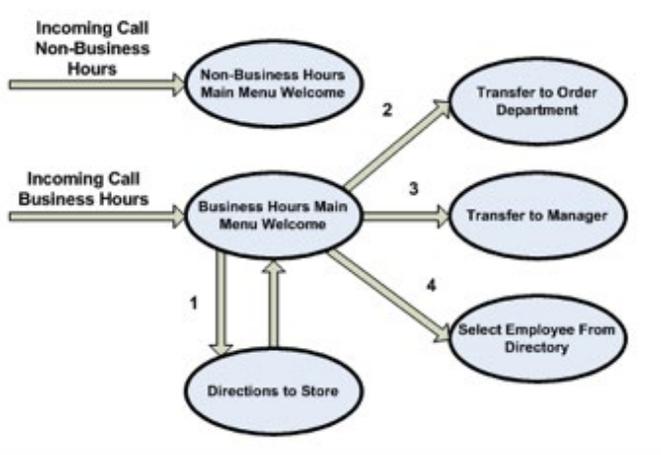
## Planning

Before you start to set up your Easy Attendant, it is a good idea to sketch out the operation of each menu on paper. This allows you to plan what options you need from the menu and how each one will operate.

For example, the main menu for a pizza company may need to include options to:

- Play an announcement giving directions to the store, then return to the main menu.
- Place an order with a server.
- Speak to a manager.
- Speak to another employee using dial-by-name

The diagram below shows how this menu would operate, including the key presses for each option.



In the diagram, option 1 (directions to the store) shows an arrow returning to the main menu so that the caller can select another option if required. This is because this option plays a recording. The other options do not allow a return to the menu.

For out-of-hours and holiday operation, Easy Attendant can provide an announcement that the store is closed (without allowing the caller to select any options), or it can provide an alternative set of menu options.

## Logging On

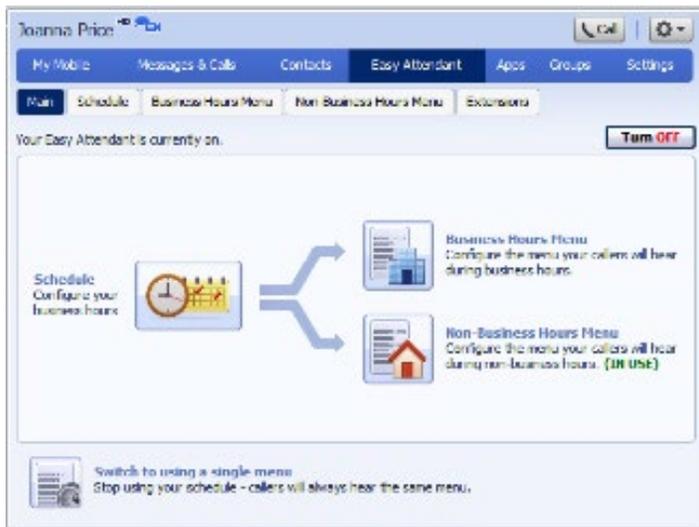
To configure your Easy Attendant, log in following these steps:

1. From the administrator portal, select Lines and then click the Individual Line icon on the far right side of the page. As an alternative, you can access the CommPortal user login screen and enter the Easy Attendant number and password.
2. If it is your first time logging in, or if no Easy Attendant configuration has been set up, you will see a welcome screen.



3. Use the radio buttons to select either a scheduled menu for business hours and non-business hours, or a single menu that will play whenever Easy Attendant is turned on, then press Continue. You can change this later if needed.
4. The screen then displays the Easy Attendant portal. This screen enables you to:
  - Turn Easy Attendant on and off. (It must be off while you are configuring it.)
  - Configure your menus.
  - Set the Schedule if you are using different menus for business and non-business hours.

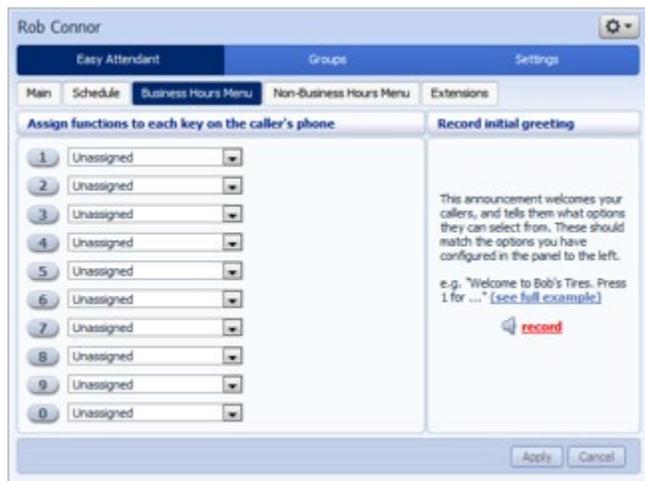
If you select to use a single menu, your Easy Attendant Portal screen will show only a single Easy Attendant menu tab.



## Configuring Menus and Schedules

You should now begin configuring your Easy Attendant menu(s) and schedules.

1. Select either the Business Hours menu table or, if you are using a single menu, the Easy Attendant menu tab.
2. Set up your Easy Attendant by recording an initial greeting.
  - If you are using the Dial By Extension at Any Time option, you should ensure that your greeting includes an option for the caller to dial an extension immediately.



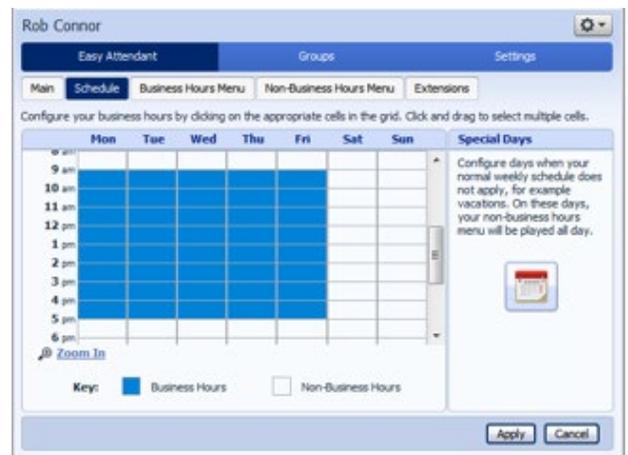
3. Select the Record option on the lower right of the screen. This launches the announcement recorder, which allows you to record an announcement or upload a pre-recorded message.

4. Once you have recorded or uploaded your initial greeting, you can return to the Menu tab.
5. Now you are ready to define the specific menu items according to your plan to one of the following options:

- Play Announcement
- Transfer to Phone
- Transfer to Voicemail
- Dial by Extension
- Dial by Name



6. If you are using a different menu for non-business hours, you should now set the initial greeting and configure the menu options on the Non-Business Hours menu tab.
7. Next you will need to establish your working hours by selecting the Schedule tab. On the Schedule screen, click on the Business Hours key. Then click in the calendar, hold down the left mouse button, and drag your cursor across the calendar to select the business hours. In the example, the business hours are Monday through Friday from 9:00 am until 5:00 pm. All other times are considered non-business hours.



8. Now you will need to select any non-working days such as holidays by clicking on the calendar in the Special Days section of the Schedule page. You can choose individual days by clicking the date in the calendar, or you can choose the Public Holidays option to automatically add holidays for your region.

## Name and Announcement Recording

This section provides additional information about selecting extension numbers and announcements and making recordings for them.

To access the name and announcement recordings from an office phone:

- Dial \*98
- Enter \*
- Enter your Easy Attendant number
- Enter PIN, default 9631475

To make changes to your Easy Attendant:

- Press 1 to turn on Easy Attendant
- Press 2 to edit announcements for business hours
- Press 3 to edit announcements for non-business hours
- Press 4 to edit recording for names for numbers

To access from another phone:

- Dial 773.250.5209
- Enter your Easy Attendant number
- Enter PIN, default 9631475

To make changes to your Easy Attendant:

- Press 1 to turn on Easy Attendant
- Press 2 to edit announcements for business hours
- Press 3 to edit announcements for non-business hours
- Press 4 to edit recording for names for numbers

### Selecting an Extension Number

- Enter the extension number for whom you want to record a name, followed by the # key.
- Remember that callers cannot access an extension using Dial by Name or Voicemail by Name until it has a name recording associated with it.
- You will be taken to the “Recording a new name” menu.

### Selecting an Announcement

You will hear a message telling you the status of the announcements with that menu. For example:

- You have announcements for keys 1, 2, and 4, and the initial announcement.
- You have no announcement for key 3.

Press the key for the announcement you wish to edit, # to edit the initial announcement, or \* to return to the previous menu.

If you press a valid key you will be invited to edit the recording associated with the announcement on the “Recording the new announcement” menu.

If not you will hear an error message indicating this was not a valid key prompt before hearing the announcement selection menu again.

### Recording the New Name

Depending on whether or not the extension you selected already has a recording associated with it, you will hear the following menus.

If a recording exists you can review it or re-record it.

- To review it, press 1. You will then hear the name recording or existing announcement.
- To re-record it, press 2. You will then be asked to make a recording as described in the Recording Menu section.
- To exit, press \*.

If no recording exists you will be taken directly to the recording menu.

### Recording the New Announcement

If a recording exists, you will hear it on selecting the announcement.

- To re-record it, press 1. You will then be asked to make a recording.
- To exit, press \*.

If no recording exists you will be taken directly to the recording menu.

### Recording Menu

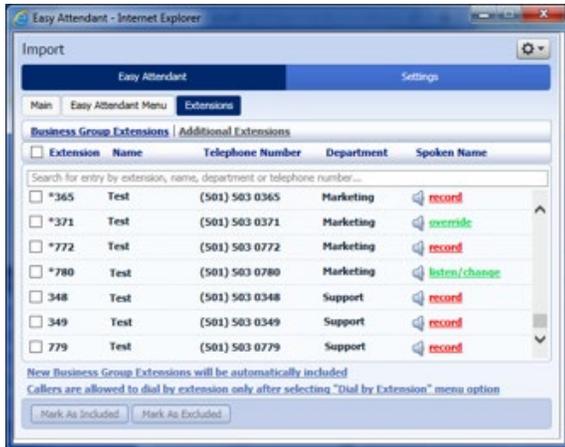
Record the name for the extension or announcement as appropriate and press # when finished. You will then be asked if you are happy with the recording.

- To accept it, press 1.
- To re-record it, press 2.
- To cancel without saving the recording, press 3.
- For announcements only, to add to the recording, press 4.



## Configuring Extensions

If you will be using Dial by Name, then you will need to define which extensions will participate and record the names of users in the extensions tab. Additionally, if you want to use the Dial by Extension at Any Time option you must configure it here.



- If you want to allow callers to dial an extension at any point in the menu and not just on a Dial by Extension menu option, click the Callers are Allowed to Dial by Extension Only After Selecting Dial by Extension menu option. This will then state that Dial by Extension Number at Any Time is permitted.
- To include or exclude an extension from dial by name, select the extension by ticking the checkbox on the left of the extension and then click either Mark as Included or Mark as Excluded.
- To record the user's name click on the Record link for that user. If a name has already been recorded, this link will display as Listen/Change.
- To record names to be used for Dial by Name, click the Record icon. If the spoken name has already been created the screen will show Listen/Change and you can click that link to hear the existing recording and/or change it.



- Use this recording interface to record the name or upload a spoken name recording, then click Save.

## Activating Easy Attendant

The final step in this process is to activate your Easy Attendant by clicking the Turn On button from the Main Tab. Your Easy Attendant is now active.



 **access one**

Technology Solutions, Delivered with Care

820 W. Jackson Boulevard, 6th Floor  
Chicago, IL 60607  
312.441.1000  
f: 312.441.1010  
[www.accessoneinc.com](http://www.accessoneinc.com)