Tutorials: Dial By Name.

Try the following tutorial to learn how to build a Dial By Name program configuration for your SBX unit. This tutorial introduces the basic concepts and ideas behind building a program configuration with the XMUCOM+ application.
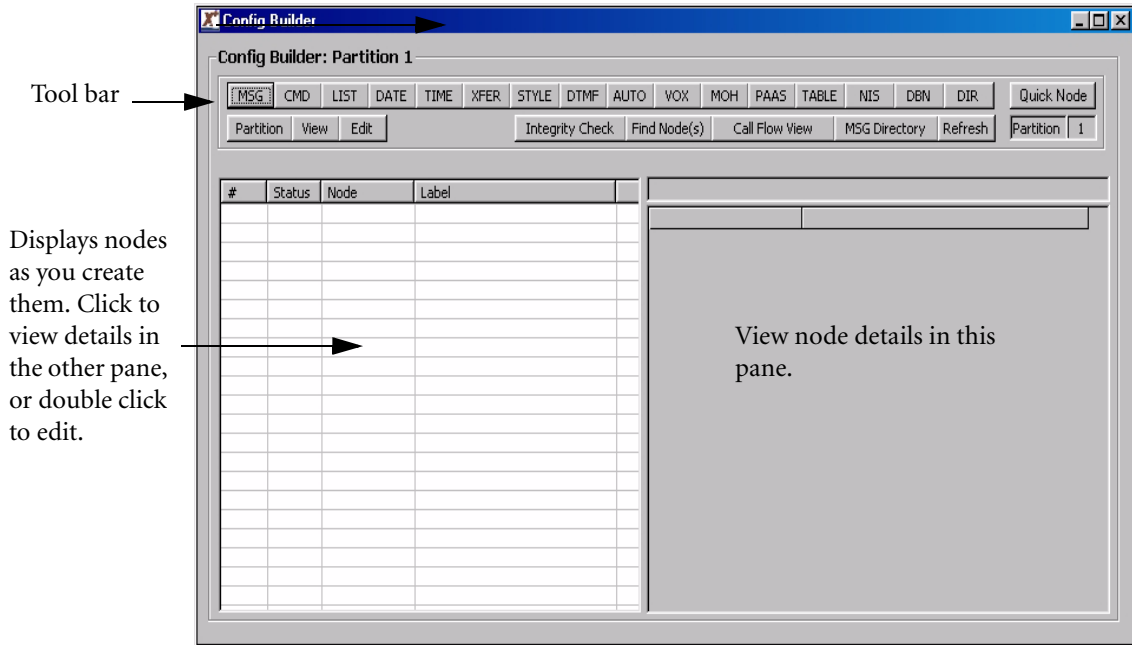
In This Chapter

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Dial By Name Tutorial.

This guide is to aid your understanding of how to set up a simple Dial by Name application on your SBX unit using XMUCOM+ administration software. The following is a step by step guide to creating a Dial by Name configuration, then transferring that configuration to the SBX unit. In this guide we give you an example Dial by Name application as a teaching aid, but it can be easily modified and adapted to be a fully functional application for your place of work.

Create a Dial by Name Application.

First double click the XMUCOM+ icon on your desktop or select XMUCOM+ from your Windows Start menu. Then Click

◆ File > New > SBX Configuration.

Tool bar

Displays nodes as you create them. Click to view details in the other pane, or double click to edit.

View node details in this pane.

This window is divided into two large panes and a tool bar. The tool bar across the top has a number of buttons (MSG, CMD, LIST etc.) which are referred to as 'nodes.' These nodes are used in various combinations to create a 'configuration.' The configuration is sent to the SBX along with any audio files (.wav files) and is the program that instructs the SBX how to handle calls and what the call flow will be.

To create a node for the configuration you simply click on the relevant button in the tool bar and the node will appear in the left hand pane. The details of that node will appear in the right hand pane. When you have multiple nodes in the left hand pane, you can click on any one to view its details in the right hand pane, or double click on one to edit those details.

Create a DBN Node

The DBN (Dial by Name) Node contains the information the SBX needs in order to process incoming calls in a Dial by Name application. i.e. what to do if it matches the digits entered by the caller, with a name from its DIR (Directory) listing. Also what to do if it can't make a match. To create a DBN Node click on the DBN button in the tool bar of the Config Builder window. The node will appear in the left hand pane of the window. Now double click on that node to display the DBN editor window.

For this example we'll label this node with the fictitious name of "Company 101." Change the 'Greeting' field to MSG 1, using the drop down buttons. MSG 1 will be the main greeting heard by callers, we will record it later with a message such as: "Thank you for calling Company 101." The Directory field can stay as default DIR 1. Next select which language prompts you'd like the callers to hear, for this example we'll use English only.

Now we need to edit the Action table. These settings tell the SBX what to do after it receives digits from the caller. Click the 'Edit' button then change the setting to match the screen-shot above. Valid Match = XFER1; Abort = XFER2; * = NOOP; # = NOOP and 0 = XFER2.

Click the OK button. XMUCOM+ will ask you if you wish to create the unreferenced nodes, click 'Yes To All.'

Edit the XFER Nodes

By clicking 'Yes to All' in the previous step, you can now see that XMUCOM+ has automatically created MSG1, XFER1, XFER2 and DIR1. Our next step is to edit the XFER Nodes. XFER 1 will be used to transfer calls when a name match has been made, and XFER 2 will be used to transfer to an attendant (in this case at extn 100) should the SBX fail to make a match from the digits the caller enters, or if the caller chooses to 'zero out' of the dial by name application.

Double click on XFER 1 and edit the fields as shown above in the screen-shot, click OK, click 'Yes To All' to automatically create any unreferenced nodes, then double click on XFER 2 and edit the fields as shown above.

Edit The Style Node

XMUCOM+ has automatically created a Style node for you. This node tells the SBX how to transfer calls on your PBX / telephone system. Not many edits required here, simply change the label to something more suitable - such as "Transfer method." The default setting for the hook-flash is 500ms. This may need to be changed to 100ms if your PBX uses a European style 'Time break recall' to transfer calls. Click OK.

Edit The DIR Node

The DIR (Directory) Node contains a list of people or departments within your company that incoming callers can reach using this application. For this example we have created five employees for Company 101. We will enter their names and telephone extension numbers into the DIR node. It is also possible to import a .CSV file into the DIR node that contains a list of names and extensions. The .CSV file must be formatted as Lastname,firstname,extension for the import operation to be successful.
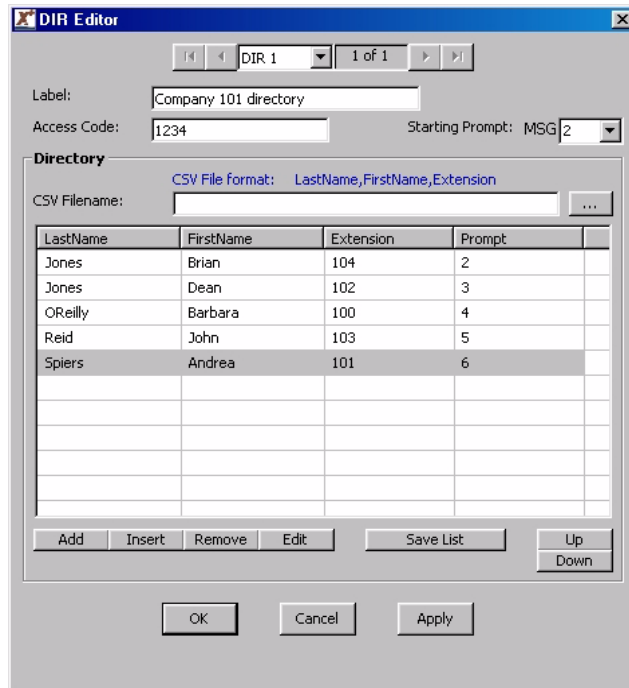
Double click on the DIR 1 node. Change the label to "Company 101 directory." The Access code is used for employees to access the SBX remotely and record their own names. This is a useful feature if you have a large number of employees to record messages for. In this example I've used an access code of 1234. More detail on recording messages remotely will follow. Next we need to change the Starting Prompt, since MSG 1 is already being used as the main greeting message. Change the Starting Prompt to MSG 2.

Now we add the names (unless you have already imported them.) To do this click on the 'Add' button five times - because we are going to add five names. Next click on the first line to highlight it and then click 'Edit.' Enter all the names as shown above (or use your own company's names.) When done, click 'Edit off.' You can now save this list as a .CSV file if you wish. Finally click OK and 'Yes to All' to create the unreferenced nodes.
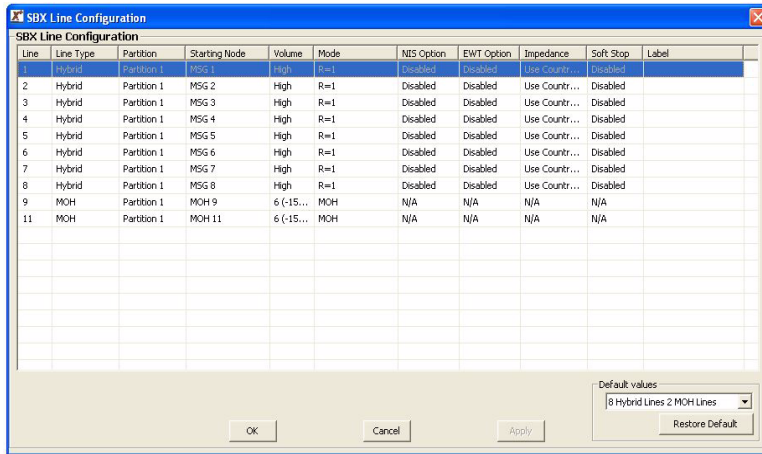
Edit MSG Nodes

XMUCOM+ has automatically created and labeled MSG (message) Nodes 2,3,4,5 & 6. We still need to label MSG 1 however. Double click on MSG 1 and change the label to "Main Greeting." Click OK.
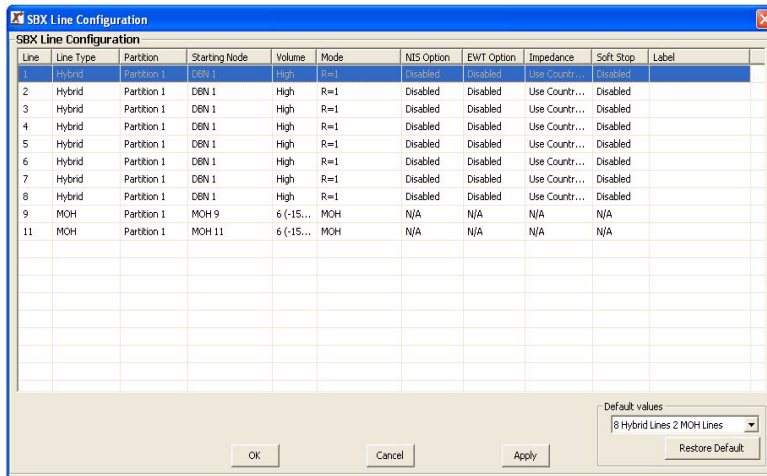
Card Configuration

We have now created all the nodes required for our Dial By Name configuration. We now need to tell the SBX which of its lines to run this application on. Here we are going to use Lines 1 through 8. At the top of your XMUCOM+ screen, click on Configuration > XMU+ Card/SBX Line Configuration. The following window will open.

Configure this window as shown in the screen-shot below. Highlight each line and change the Starting Node to DBN1.

In the Line Configuration window we tell the SBX which node is the starting point when it receives an incoming call. In this application the 'Starting Node' is DBN 1. Leave all other settings at default, and add a label such as "Company 101 Dial by Name" to describe the application running on the lines you just assigned this configuration to. Click OK to close the Line Configuration window.

Note: If the Config Builder window should disappear from view, simply click on the Configuration Builder button near the top of your XMUCOM+ window.
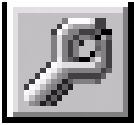
We have finished the configuration and your Config Builder window should look like this.

You can save this configuration by clicking File > Save as.

Send the Configuration to the SBX

Now that we have completed the configuration, we need to send it to the SBX. From the menu bar at the top of your XMUCOM+ screen, click on Communication > Communicate. The following window will open.
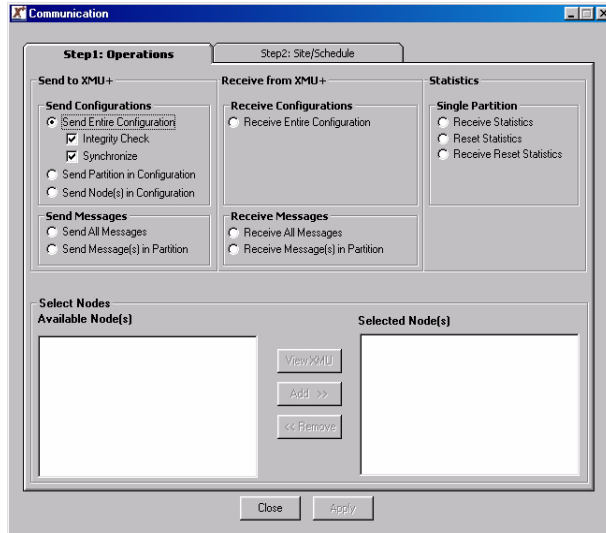
In the screen-shot above you can see we have selected "Send entire Configuration." Next we need to tell XMUCOM+ where to send it. Click on the "Step 2: Site/Schedule" tab to show the following screen.
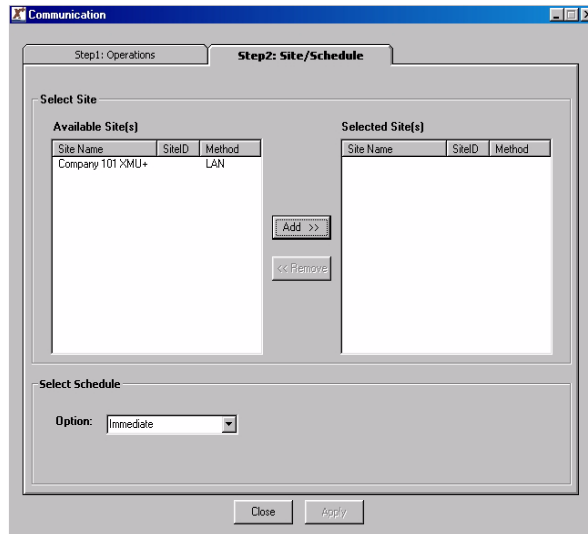
Highlight the site you wish to send the configuration to by clicking on it. Then click the 'Add' button. Now click the 'Apply' button and XMUCOM+ will send the configuration to the SBX unit.

Record the Messages

The only thing remaining is to record the messages. In this example we have 6 messages (MSG Nodes).

Message 1 is the main greeting message and can be recorded as described in Chapter 6 of the SBX system manual.

Messages 2,3,4,5 & 6 are the recorded names of the people in the Dial by Name application. These can also be recorded as described in Chapter 6, or by using the remote telephone access port and entering the access code programmed into the DIR Node. In our example we used 1234 as an access code to this node.

To record the messages using this method:

- ◆ Dial the remote telephone access port on the SBX
- ◆ The SBX will answer and prompt "Enter access code."
- ◆ Enter the DIR Node's access code - e.g. 1234
- ◆ The SBX will respond "Enter user number"
- ◆ Enter the extension number you are recording the message for - e.g. 104
- ◆ The SBX will respond "Enter command."
- ◆ Enter 7 (to record the message.)
- ◆ Record the name of the person at that extension - e.g. "Brian Jones"
- ◆ Press the # key when finished recording.
- ◆ The SBX will respond "Message recorded. Enter command."
- ◆ You can now enter '0' to disconnect, or enter '00' to enter the next extension and record the next name.

Note: An administrator can record all the names using this method, or each person can call into the SBX remote telephone access port and record their own names.

Dial by Name Application Completed!

Congratulations, you have set up a Dial by Name application on your SBX. In this example we have two people with the same second name, Jones. When a caller enters the digits to speak to a Jones, the SBX will prompt them if they want to speak to Brian Jones or Dean Jones. The caller selects which one and their call is transferred accordingly.

The SBX unit is now ready and waiting to process calls!

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