

SBX Tutorial: Auto Attendant

This guide is to aid in your understanding of how to set up a simple Auto Attendant application on your SBX unit using XMUCOM+ administration software. Full instructional manuals can be found on the CD included in your shipment. The following is a step by step guide to creating an Auto-Attendant configuration using XMUCOM+ software, then transferring that configuration to the SBX unit. In this guide we give you an example Auto Attendant as a teaching aid. It can be easily modified and adapted to be a fully functional Auto Attendant for your place of work.

Suggested message script for this Auto-Attendant example:-

Msg1 - "Thank you for calling ABC company. If you know your party's extension, you may enter it at any time. For office hours and directions, press 1. For residential sales, press 2. For commercial sales, press 3. For the operator, press 0.

Msg2 - "Thank you for calling ABC company, our office is now closed. If you know your party's extension, you may enter it at any time. For office hours and location, press 1. For residential sales, press 2. For commercial sales, press 3.

Msg3 - Thank you for calling ABC company, in observance of the holiday our office is currently closed. If you know your party's extension, you may enter it at any time. For office hours and location, press 1. For residential sales, press 2. For commercial sales, press 3.

Msg4 - Our normal office hours are 8 am to 5 pm Monday to Friday. We're located at 123 Main Street, Newtown.

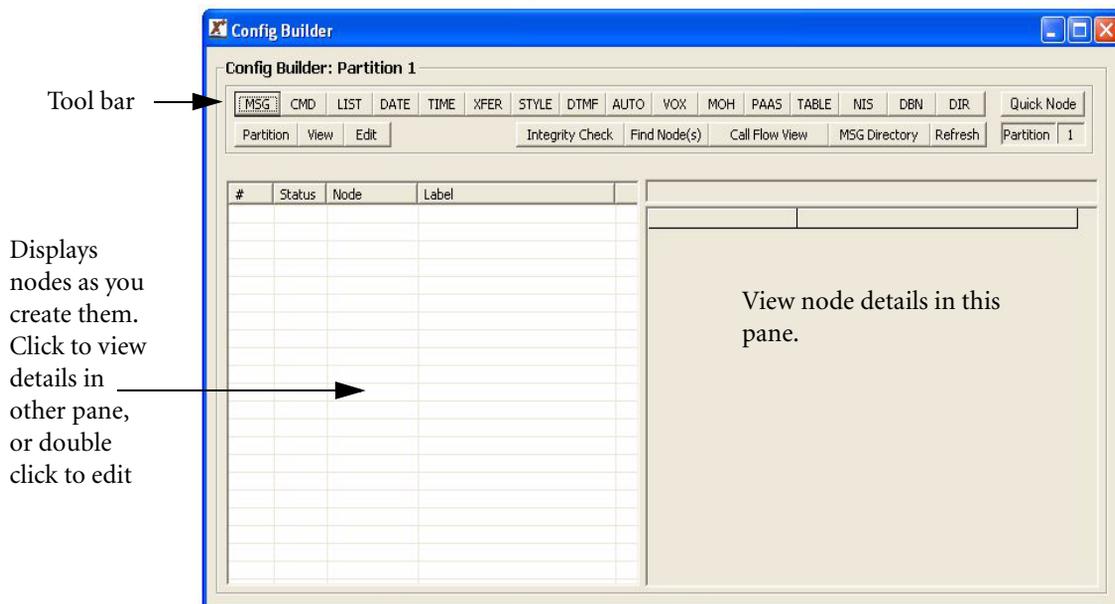
Msg5 - I'm sorry, that is an invalid selection.

Msg6 - Once again, thank you for calling ABC company. Have a great day!

Create an Auto Attendant Application

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

- ◆ File, New, SBX Configuration.



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 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.

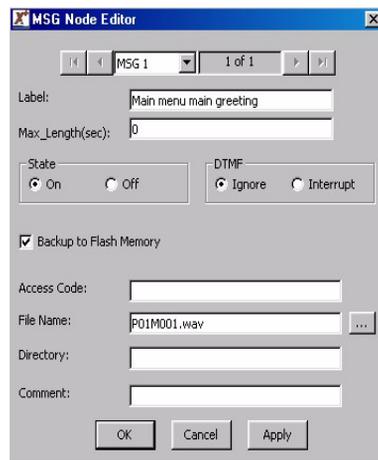
First we will create and label the messages used by the Auto-Attendant application. Click the MSG button in the tool bar of the Config Builder window six (6) times to create six Message nodes. Double click on MSG node one (1) in the left hand pane to open the MSG

Node Editor window and edit the attributes of that message. Use the scroll buttons at the top of the MSG node editor window to edit MSG node two, three, etc.

- ◆ Msg 1 - Main menu main greeting
- ◆ Msg 2 - Main menu night greeting
- ◆ Msg 3 - Main menu holiday greeting
- ◆ Msg 4 - Hours and directions
- ◆ Msg 5 - Invalid
- ◆ Msg 6 - Goodbye

Edit and label Msg Nodes

Next we'll 'map' the message nodes to the audio files which should be stored on your hard drive or network. To do this simply click on the box to the right of the "File Name" field in the MSG Node Editor window, then browse to where the audio file for that message is stored. Select the .wav file and click 'open.'

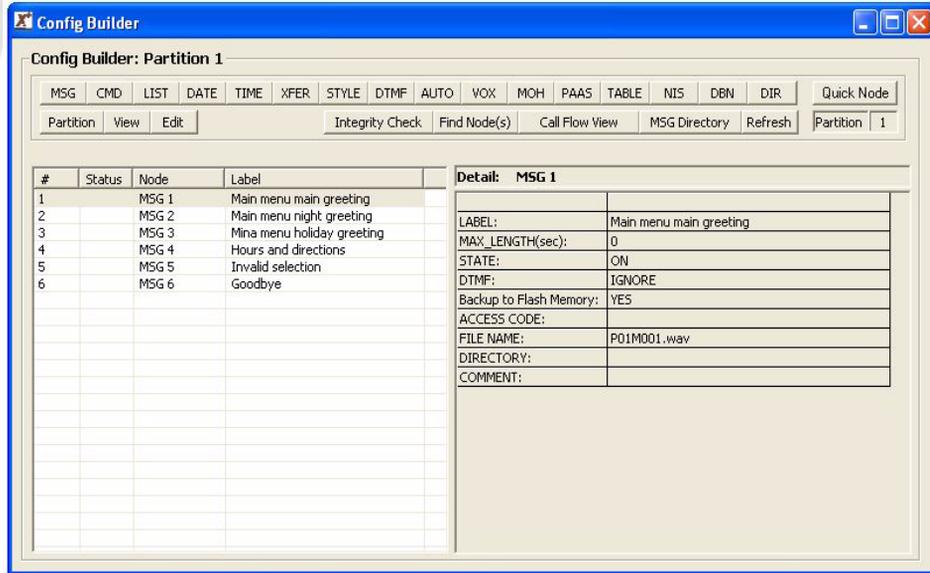


The screenshot shows the 'MSG Node Editor' window. At the top, there are navigation buttons and a dropdown menu showing 'MSG 1' and '1 of 1'. Below this, the 'Label' field is filled with 'Main menu main greeting'. The 'Max_Length(sec):' field is '0'. There are two groups of radio buttons: 'State' with 'On' selected and 'Off' unselected; 'DTMF' with 'Ignore' selected and 'Interrupt' unselected. A checked checkbox labeled 'Backup to Flash Memory' is present. Below these are fields for 'Access Code:', 'File Name:' (containing 'P01M001.wav' and a browse button), 'Directory:', and 'Comment:'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

Note: If you do not have the audio files on your computer, you can record the messages directly onto the SBX via the remote telephone access port or using Message Manager. You can also use the handset & front panel.

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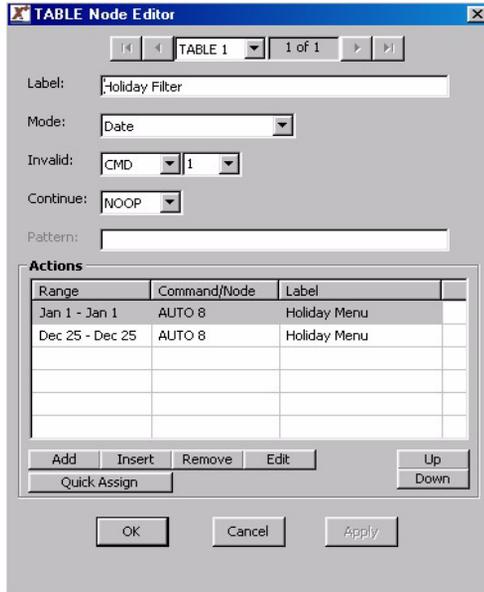
Once you have edited the MSG nodes, your Config Builder window should look like this.



Create a Table Node

In order to filter out holiday dates from normal working days in our Auto-Attendant, we need to create a Table node. This node holds all the relevant dates in one place and tells the SBX what to do if it receives a call on one of those dates. Here we show two holidays, but you

can add as many holidays as you require to this node. Click the TABLE button in the Config Builder window and edit the following Table node.

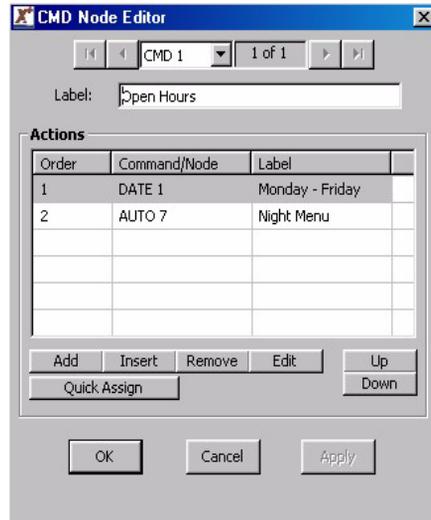


Note: The labels shown in the example sheen shots in this guide will not appear on your screen until after the configuration has been completed and saved.

Create a Command Node

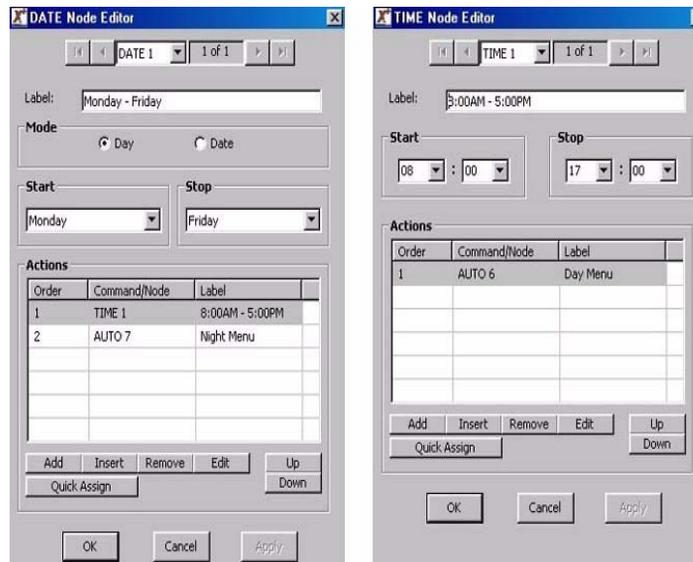
The Command node tells the SBX what actions to take when certain conditions are true. In this application the Command node is used in conjunction with a DATE and a TIME node. In the next screen shots we see that if it is between Monday to Friday, 8am to 5pm then the SBX will give the callers “day menu” options (AUTO 6), if it isn’t between these times/dates, the SBX will give the callers “night menu” options (AUTO 7). Click on the CMD button in the Config Builder window and create the following Command node.

Note: When you reference a node that hasn’t been created yet, XMUCOM+ will offer to create it for you. You can accept this option and edit the node later, or decline and create it manually when you are ready.



Create Date and Time nodes

The SBX needs to know how to handle calls at certain dates and times. To do this we will create the following nodes. Click on the DATE and the TIME buttons on the config Builder and edit to create the following.



Create Auto Nodes

In this application we require three AUTO nodes. One to handle calls received on normal working days, one to handle calls received out of office hours and one to handle calls received during the holidays. Here we'll call them AUTO 6, AUTO 7 and AUTO 8 respectively.

Note: To change the number of a node, e.g. to change AUTO 1 to AUTO 6, simply right-click on the node and select 'rename.'

Click the AUTO button in the Config Builder window and create the following AUTO nodes. (Or double click and edit AUTO 6 if XMUCOM+ already created it for you. Use the scroll buttons at the top of the editor window to edit AUTO 7 and 8.

The screenshot shows the 'AUTO Node Editor' window for 'AUTO 6'. The window is divided into several sections:

- Prompts:** A table with columns 'Order', 'Command/Node', and 'Label'. It contains one entry: Order 1, Command/Node MSG 1, Label Main menu main ...
- Actions:** A table with columns 'Entry', 'Command/Node', and 'Label'. It contains four entries:

| Entry | Command/Node | Label |
|-----------|--------------|----------------------|
| 1000-1999 | XFER 1 | AUTO |
| 0-0 | XFER 2 | Operator |
| 1-1 | MSG 4 | Hours and directi... |
| 2-2 | XFER 3 | Residential Sales |
| 3-3 | XFER 4 | Commercial Sales |
- Exceptions:** A table with columns 'Command/Node' and 'Label'. It contains four entries:

| Command/Node | Label |
|--------------|-------------------------|
| Timeout | NOOP |
| Invalid | MSG 5 Invalid selection |
| Abort | XFER 2 Operator |
| * | AUTO 6 Day menu |
| # | NOOP |
- Settings:**
 - Label: Day menu
 - Number of Digits: 4
 - Terminating Digit: No
 - Retry Limit: 1
 - Selection Time Out(sec): 4
 - Digit Time Out(sec): 2

Buttons at the bottom include OK, Cancel, and Apply.

AUTO Node Editor

Label: Night menu

Navigation: AUTO 7, 2 of 3

| Prompts | | |
|---------|--------------|---------------------|
| Order | Command/Node | Label |
| 1 | MSG 2 | Main menu night ... |
| | | |
| | | |

Buttons: Add, Insert, Remove, Edit, Up, Down, Quick Assign

| Actions | | |
|-----------|--------------|----------------------|
| Entry | Command/Node | Label |
| 1000-1999 | XFER 1 | AUTO |
| 1-1 | MSG 4 | Hours and directi... |
| 2-2 | XFER 3 | Residential Sales |
| 3-3 | XFER 4 | Commercial Sales |
| | | |
| | | |

Buttons: Add, Insert, Remove, Edit, Up, Down, Quick Assign

| Exceptions | | |
|------------|--------------|-------------------|
| | Command/Node | Label |
| Timeout | NOOP | |
| Invalid | MSG 5 | Invalid selection |
| Abort | MSG 6 | Goodbye |
| * | AUTO 7 | Night menu |
| # | NOOP | |

Buttons: Edit, Default

Number of Digits: 4

Terminating Digit: No

Retry Limit: 1

Selection Time Out(sec): 4

Digit Time Out(sec): 2

Buttons: OK, Cancel, Apply

AUTO Node Editor

Label: Holiday menu

Navigation: AUTO 8, 3 of 3

| Prompts | | |
|---------|--------------|--------------------|
| Order | Command/Node | Label |
| 1 | MSG 3 | Main menu holid... |
| | | |
| | | |

Buttons: Add, Insert, Remove, Edit, Up, Down, Quick Assign

| Actions | | |
|-----------|--------------|----------------------|
| Entry | Command/Node | Label |
| 1000-1999 | XFER 1 | AUTO |
| 1-1 | MSG 4 | Hours and directi... |
| 2-2 | XFER 3 | Residential Sales |
| 3-3 | XFER 4 | Commercial Sales |
| | | |
| | | |

Buttons: Add, Insert, Remove, Edit, Up, Down, Quick Assign

| Exceptions | | |
|------------|--------------|-------------------|
| | Command/Node | Label |
| Timeout | NOOP | |
| Invalid | MSG 5 | Invalid selection |
| Abort | MSG 6 | Goodbye |
| * | AUTO 8 | Holiday menu |
| # | NOOP | |

Buttons: Edit, Default

Number of Digits: 4

Terminating Digit: No

Retry Limit: 1

Selection Time Out(sec): 4

Digit Time Out(sec): 2

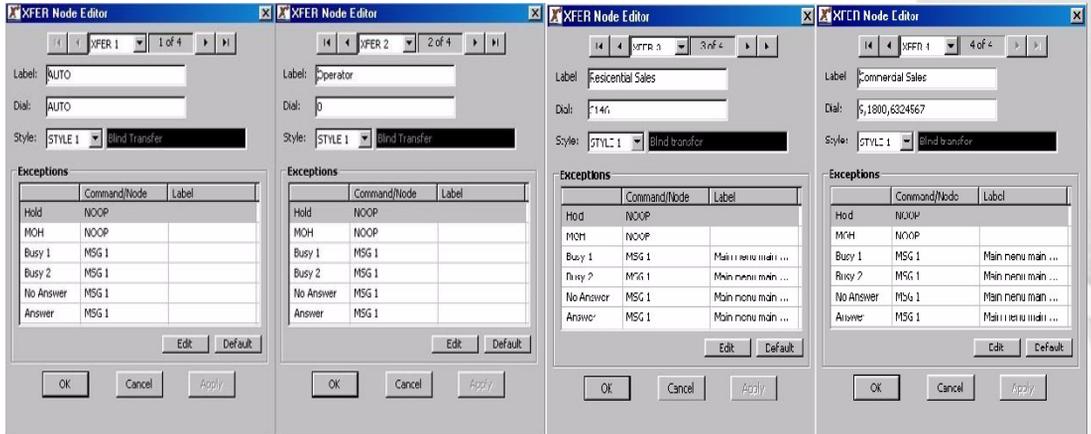
Buttons: OK, Cancel, Apply

Create XFER nodes

For the SBX to transfer calls to different extensions, it requires some information. The XFER nodes hold the number to transfer to, e.g. Operator - 100, and the XFER-STYLE node tells the SBX how to transfer calls on your telephone system, e.g. Hookflash 500Ms. An Auto-Attendant configuration will contain multiple XFER nodes, but usually only one XFER-STYLE node. Here we are going to create four XFER nodes

- ◆ XFER 1 - AUTO (this means the SBX will transfer to the extension entered by the caller.
- ◆ XFER 2 - Operator
- ◆ XFER 3 - Transfer to ACD group
- ◆ XFER 4 - Transfer off site

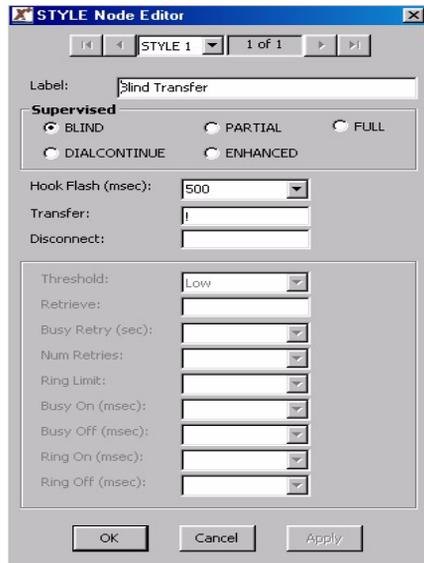
Click on the XFER button in the Config Builder window to create the following XFER nodes (or double click to edit if it exists already.) The field labeled “Dial” should read “AUTO” in Xfer 1, and you will need to change the telephone numbers or extensions in XFERs 2,3 and 4. For example XFER 2 is to transfer to the operator, on your telephone system this number may be 100.



Create an XFER-STYLE Node

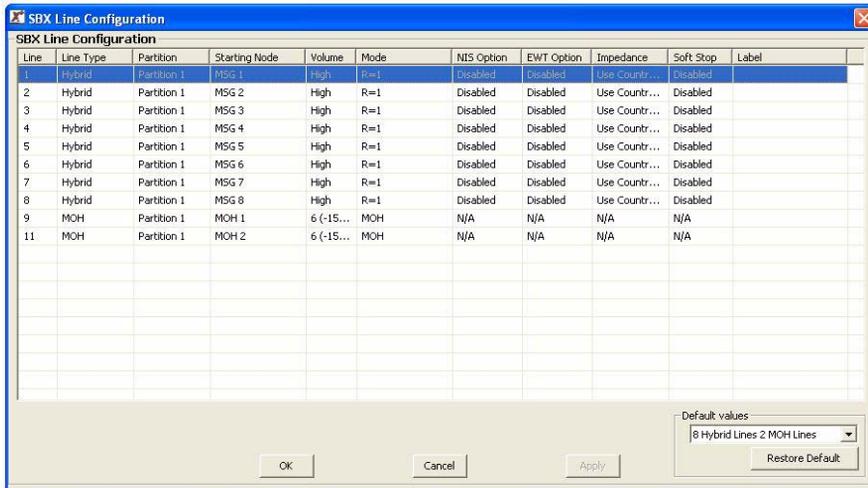
Click on the STYLE button to create an XFER-STYLE node (unless XMUCOM+ has already created it for you.) Double click on the node to open the editor window and ensure the parameters match the following.

Note: The default Hook-Flash time is 500Ms. If your phone system uses Time Break Recall to transfer calls (Europe, Australia, etc.) you will need to change this setting to 100Ms

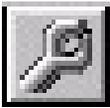
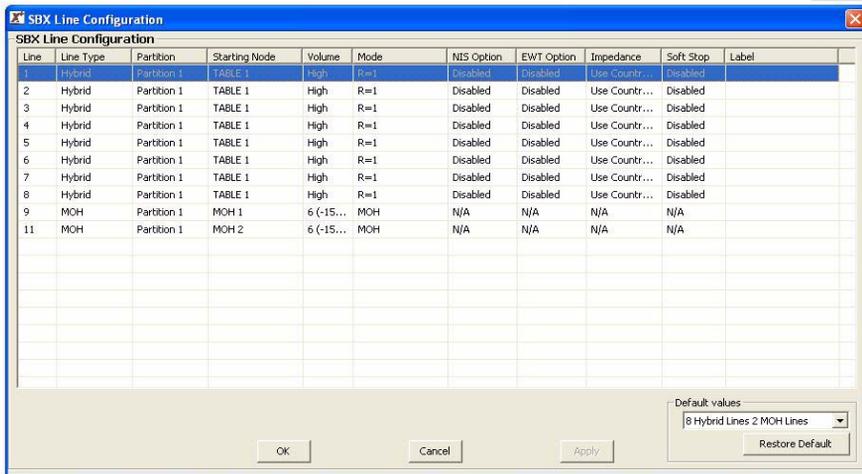


Card Configuration

Now that we have created the call flow, we need to tell the SBX which of its lines to run this configuration 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.

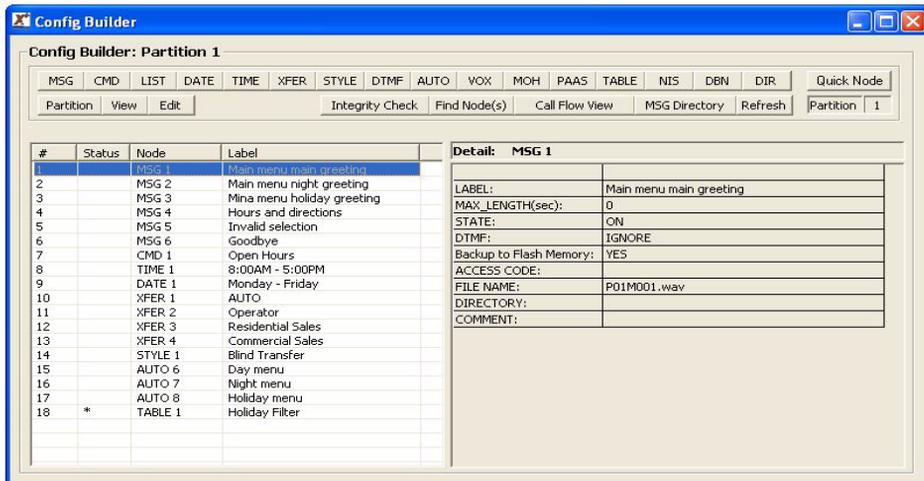


Next configure this window as shown in the screen-shot below. Simply click on the Starting Node of each line and change it to TABLE 1. Now click OK.



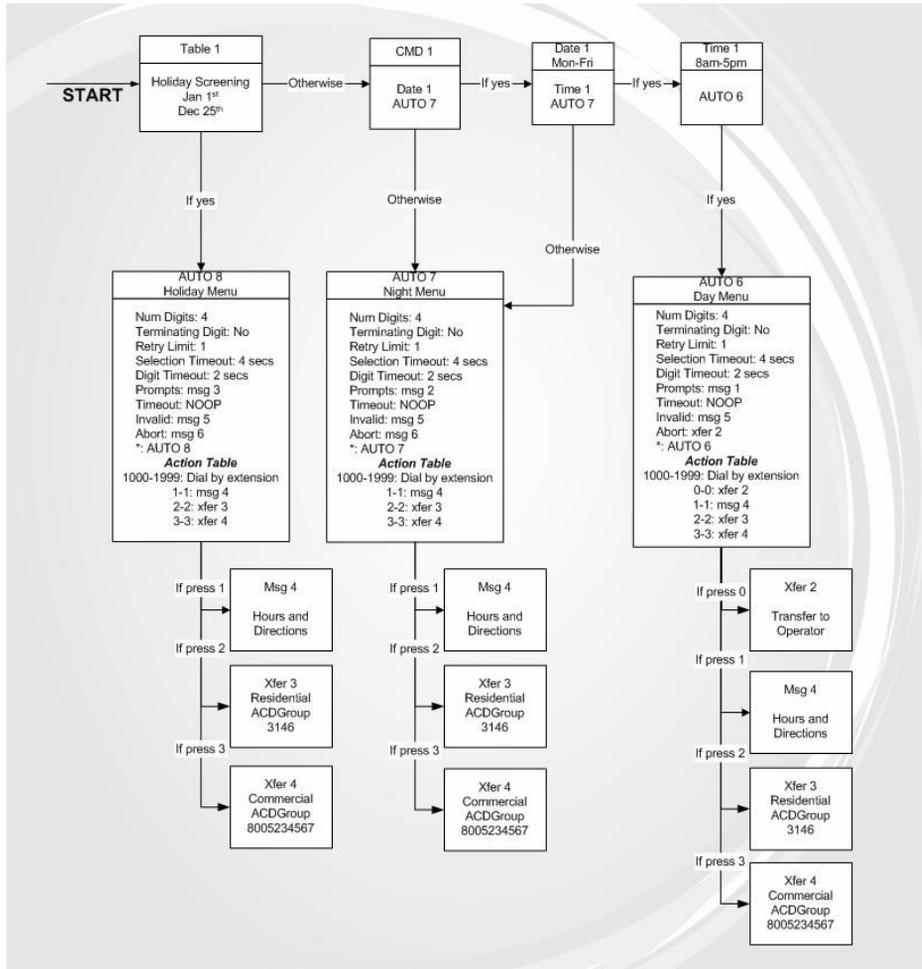
Note: If the Config Builder window should disappear from view, simply click on the Configuration Builder button near the top of your XMUCOM+ window

We have now created all the nodes and your config builder should look like this.



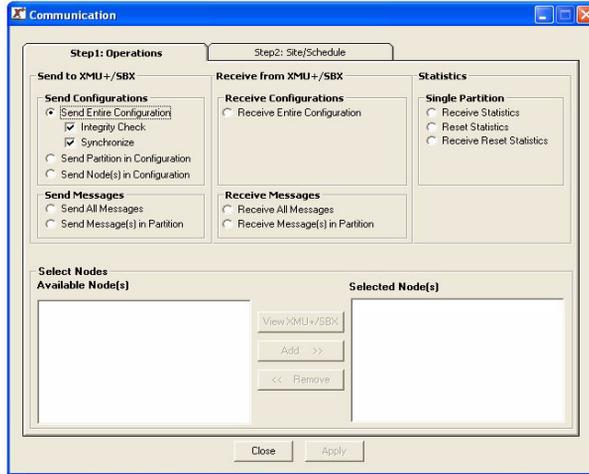
What does the call flow look like?

We have completed the configuration! The following diagram is a graphical representation of the call flow we have just created. Here we can see how all the nodes inter-relate to each other to process the calls. The start point, or Starting Node as it is referred to in the SBX configuration, is TABLE 1 in the top left hand corner. This first checks to see if it is a holiday. If it is, the call flow is directed to AUTO 8 where the caller will only be presented with options available during a holiday period. If it isn't a holiday the call flow is directed to CMD 1, which checks the date and time. This then directs to caller a specific menu for either normal office hours, or a different menu for after hours and weekends.

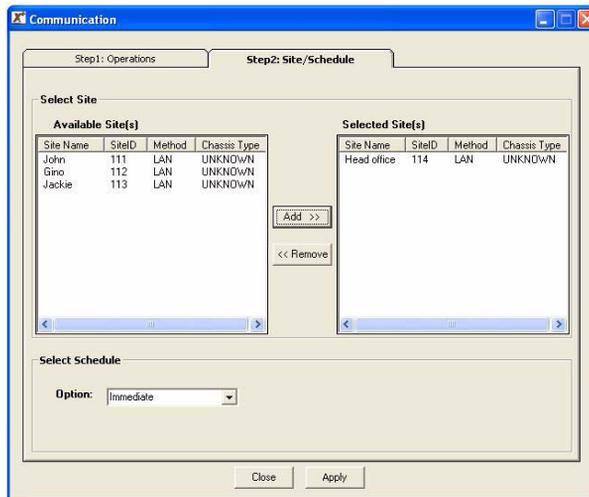


Send the Configuration to the SBX

All that's left is to send the configuration and the messages to the SBX. First save the configuration on your hard drive or network using File, Save as. Now 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.



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Next 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 selected SBX site. Finally you'll need to repeat the last two steps, but instead of "Send Entire Configuration," you now need to select "Send All Messages."

Your SBX is now configured as an Auto Attendant and is ready to accept calls.