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Introduction

This user guide provides instructions on how to use the Call Management Portal for Telesystem Blue Platform administration interface for an Auto Attendant. The portal allows you to manage all aspects of your integrated Auto Attendant, including:

- Creating and editing greetings
- Creating and editing menus
- Routing calls to different destinations
- Setting up time schedules

The web portal is a powerful tool that can help you to automate your incoming calls and improve the efficiency of your business. This guide will walk you through the process of using the portal step-by-step.

Here are some of the benefits of using the web portal administration interface for an Auto Attendant:

Flexibility: The web portal allows you to customize your Auto Attendant to meet the specific needs of your business. You can create different greetings for different times of day, create menus with multiple options, and route calls to different destinations based on the caller's needs.

Scalability: The web portal is scalable to meet the needs of growing businesses. You can create new menus, and route calls to new destinations as your business grows.

Security: The web portal is secure and protects your data. You can set up user permissions to control who has access to different features.

If you are looking for a way to automate your incoming calls and improve the efficiency of your business, the web portal administration interface for an Auto Attendant is a great option. This user guide will walk you through the process of using the web portal step-by-step.

Portal Navigation

The screenshot shows the Telesystem portal dashboard for '2700 Oregon Rd'. The interface includes a left-hand navigation pane, a top navigation bar, and a main dashboard area with various metrics and reports. Red callout numbers 1 through 8 are placed over specific UI elements:

- 1:** A button in the top left of the navigation pane to expand/collapse the menu.
- 2:** The breadcrumb navigation path: Home / NETAXIS TEST / Groups / 2700 Oregon Rd.
- 3:** A toggle switch for 'Show advanced features' in the top right.
- 4:** Language settings (EN) in the top right.
- 5:** Change Log icon in the top right.
- 6:** Change Password/Logout icon in the top right.
- 7:** The left-hand navigation menu items.
- 8:** A back button in the top left of the navigation pane.

The dashboard content includes:

- IVR:** 1
- HG (Hunt Groups):** 2
- CQ (Call Queues):** 1
- CC (Call Centers):** 1
- PG (Pickup Groups):** 3
- PCC (Premium Call Centers):** 2
- Licenses:** A donut chart showing various license types: Hosted Station Complete (15), Webex Package (6), Add-on Call Center - Premium (3), Hosted Station Standard (3), and Add-on BroadWorks Receptionist - Enterprise (2).
- Users:** 14 users listed in a table with columns for Name, Phone number, and Extension.
- Devices:** 38 total, with 20 assigned to 23 phone numbers.

Key	Description
1	Use this button to expand and minimize the left-hand navigation pane to show or hide the names of the menu items.
2	File path navigation. As you navigate through the portal, use the links here to return to a previous page/menu item.
3	Show Advanced Features toggle switch. Enable or disable this toggle switch to show/hide additional settings and configuration options depending on the menu you are on.
4	Language settings. Use click here and use the drop-down to select between, English, Spanish, French, Netherlands (Dutch), German, or Arabic.
5	Change Log. Click here to access a change log that allows you to see what changes have been made and who made them.
6	Change Password/Logout. Click here and use the drop-down options to manually change your admin credential password or logout of the portal.
7	Navigation Pane. Use this menu to navigate through the portal by selecting the menu option you wish to access.
8	Back Button. Allows users to go back 1 previous step in their navigation.

Accessing the Media Files

Media files are the audio files that play to callers when they reach different menus within the Auto Attendant/IVR. These media files may be stored in two different places within the portal:

- Group Level Media Files
- Auto Attendant/IVR Media Files

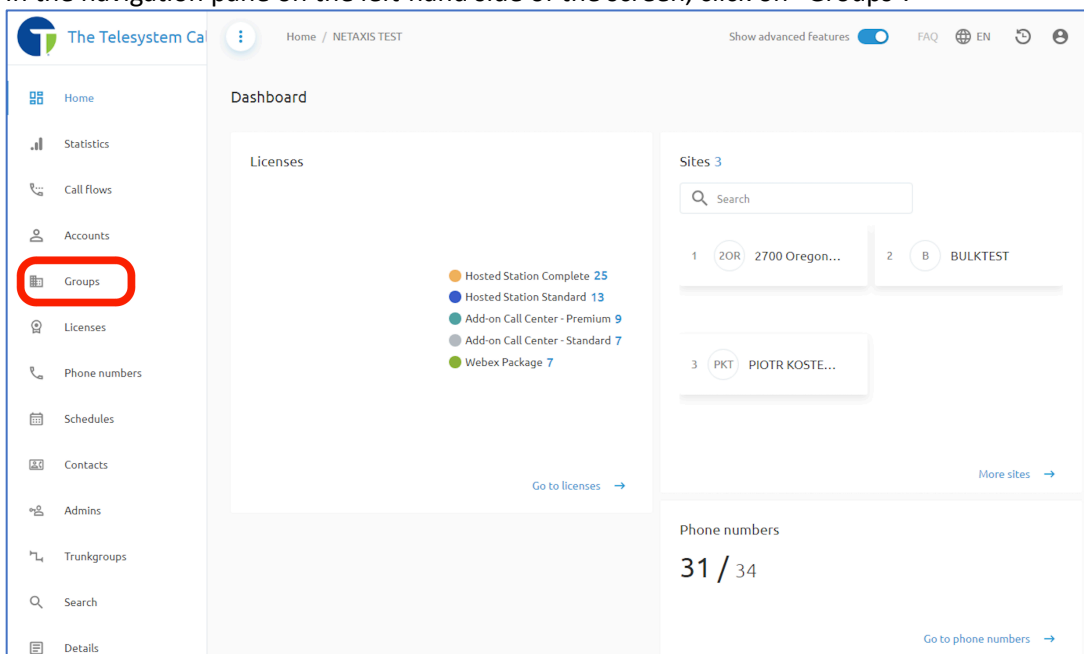
When the audio files are stored directly with the Auto Attendant/IVR, those files can only be used with that specific Auto Attendant.

Audio files stored at the group level may be used across multiple Auto Attendants/IVRs as well as other features.

Group Level Media Files

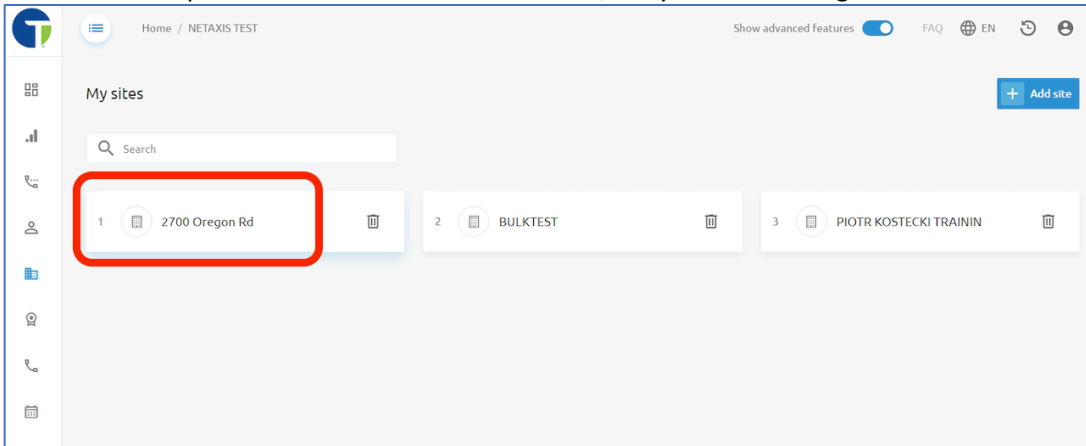
To access the Group Level Media Files

1. Login to the Call Management portal with your Enterprise or Group Level credentials.
2. In the navigation pane on the left-hand side of the screen, click on “Groups”.

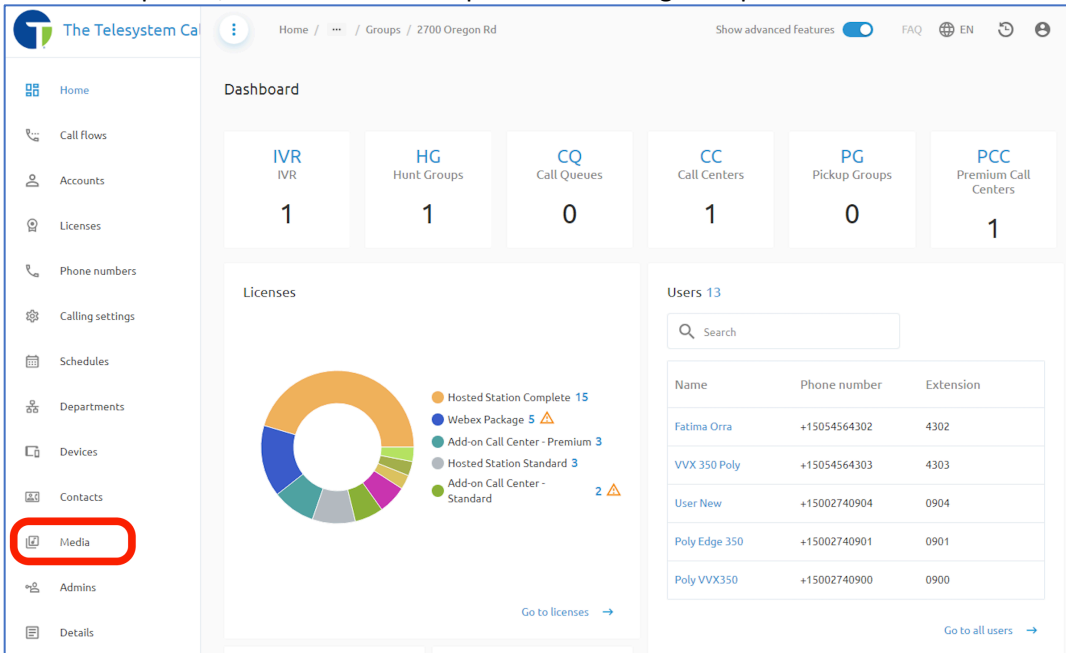


- a. NOTE: You can expand this navigation pane by clicking on the button at the top, left corner of the page that looks like this: ☰

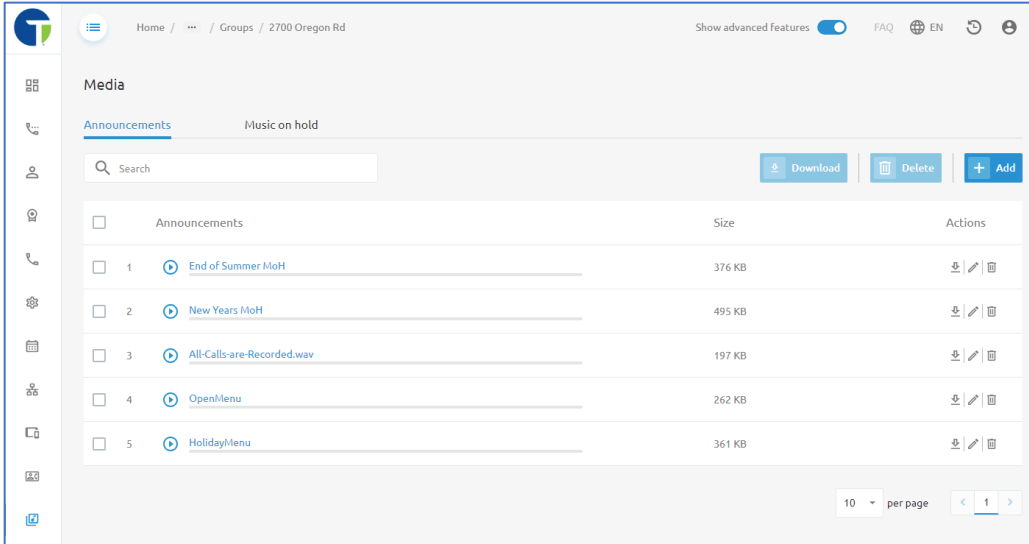
3. Select the Group that contains the Auto Attendant/IVR you are working on.



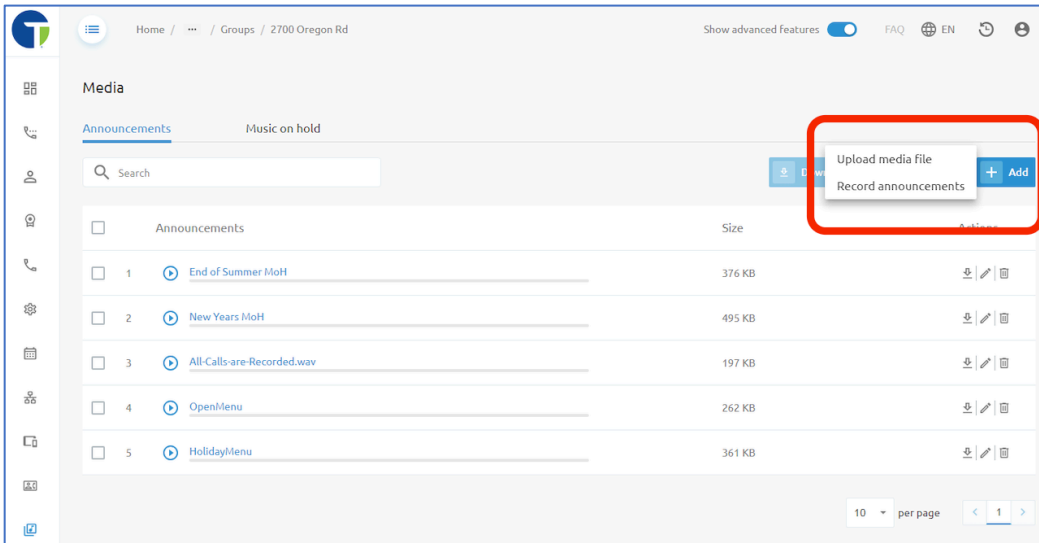
4. At the Group level, click on the menu option in the navigation pane labeled "Media".




- On this page you will have “Announcements” and “Music on Hold”. On the “Announcements” section is where you will find audio files that can be used for your Auto Attendant/IVR menus and Pre-Alerting Announcements.

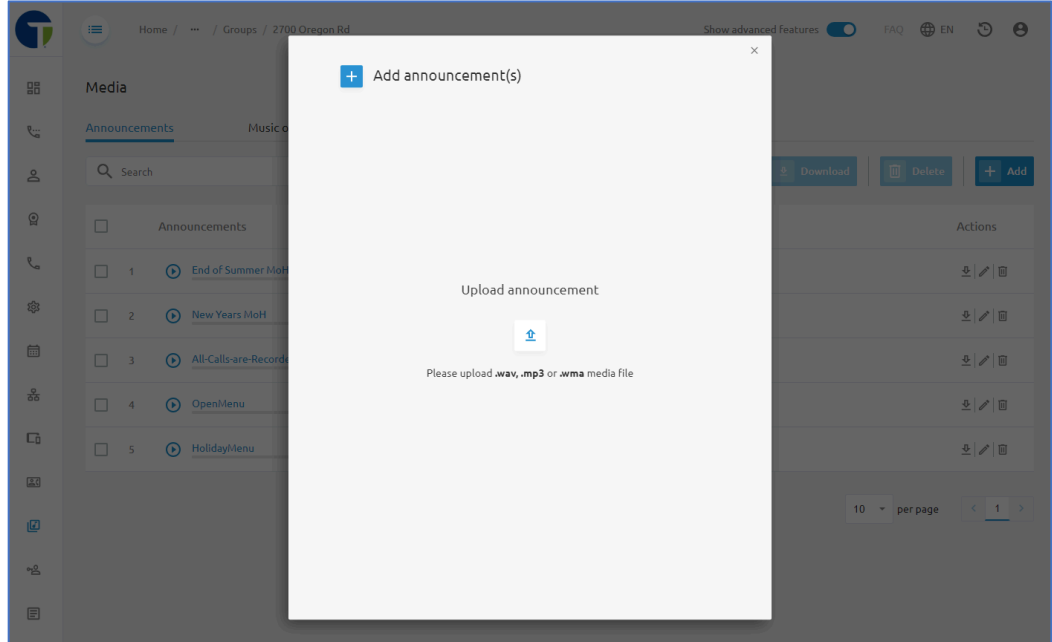


- From the portal you can play the audio file, download it , edit the file , or delete it .
- To add new files into the system, click the “+Add” button at the top, right-corner of the page, then choose if you want to upload a media file already saved on your desktop, or if you want to record announcement.



- a. **Upload media file** – When this option is selected you will receive a pop-up window advising you of the compatible file types (.wav, .mp3, or .wma media files).

Click the **Upload** button  to browser your computer's file directory to locate the audio file you want to upload.

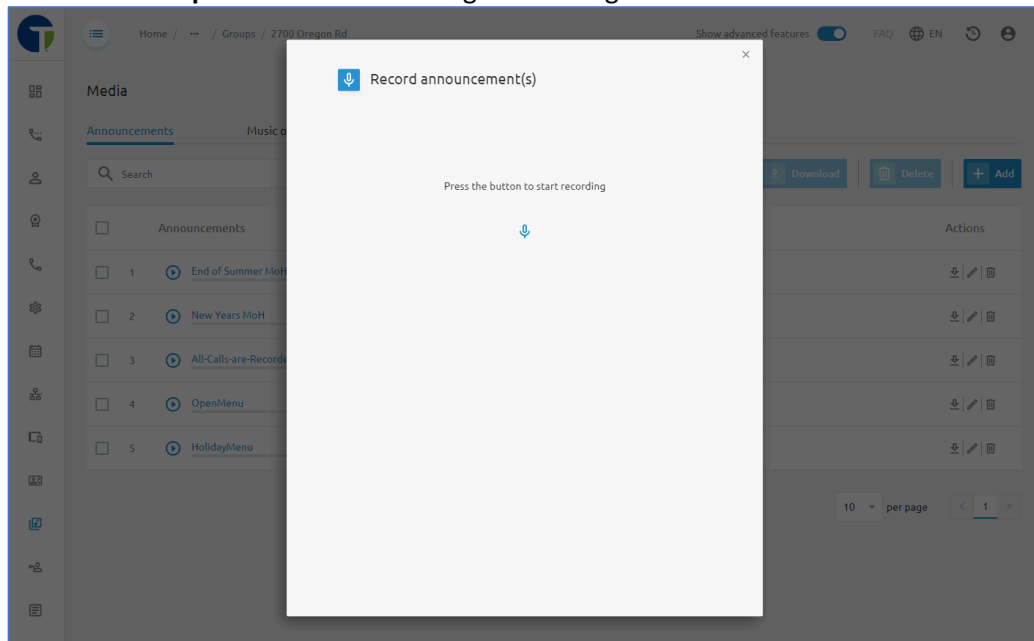



Locate the audio file, and open or select it from the file browser window to initiate the upload process.

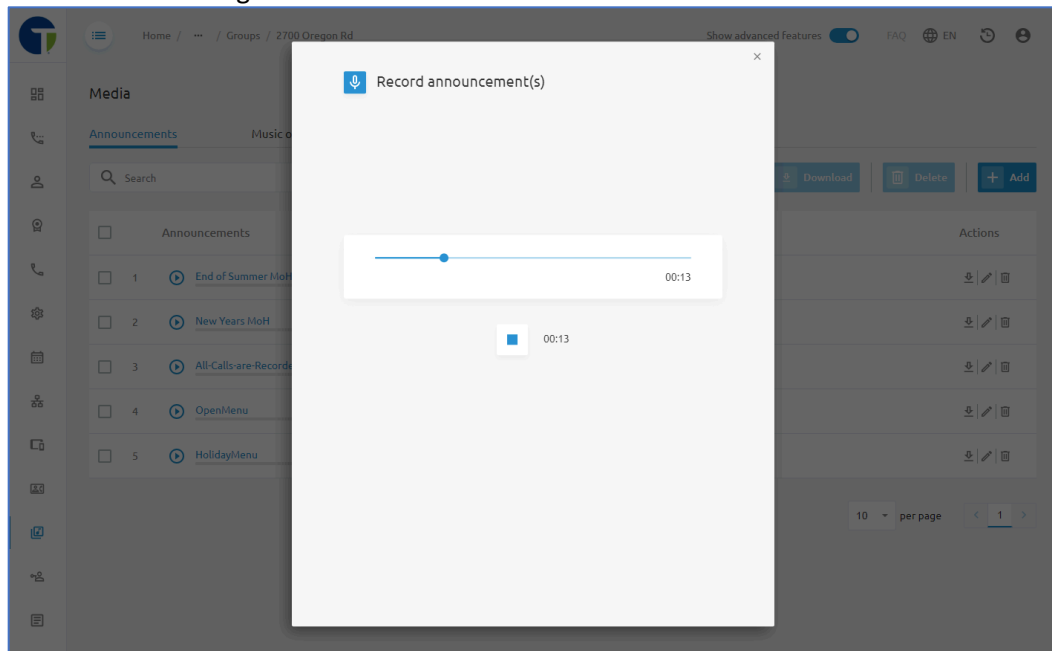
- b. **Record Announcements** - If you wish to record a new announcement you must be using a compatible web browser, we suggest Google Chrome or Mozilla Firefox.

You must also have a working microphone, and grant permission for the web page\browser to have access to your microphone to record.

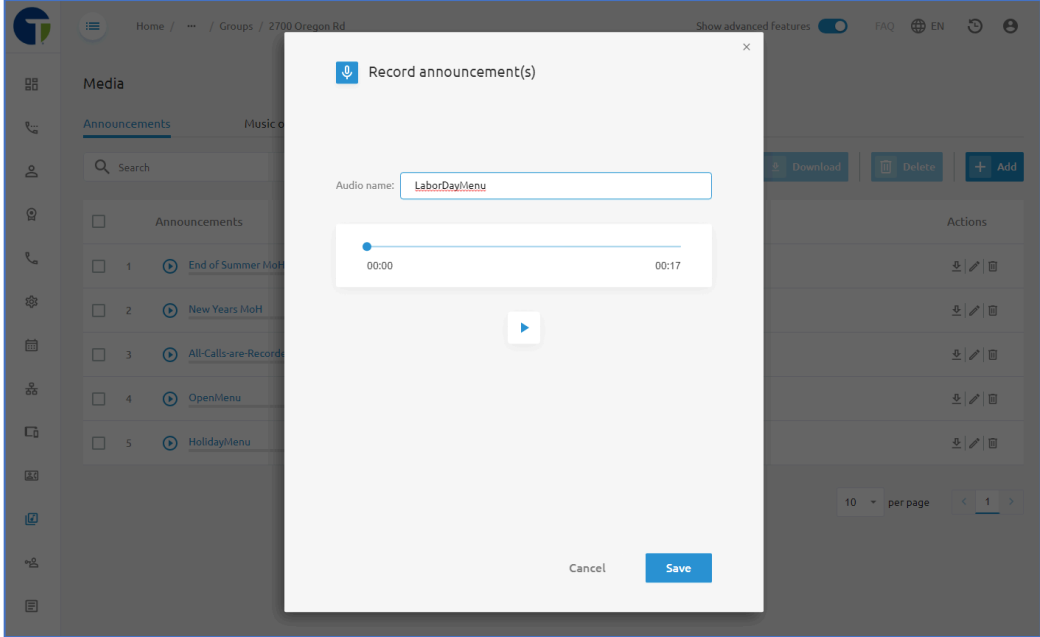
Press the **microphone** button  to begin recording.



When recording starts you will see the pop-up window will change, and you will now see a progress bar and a stop button. Speak clearly into the microphone and record your message. Only record what you want your callers to hear. Then press the stop button  to end the recording.



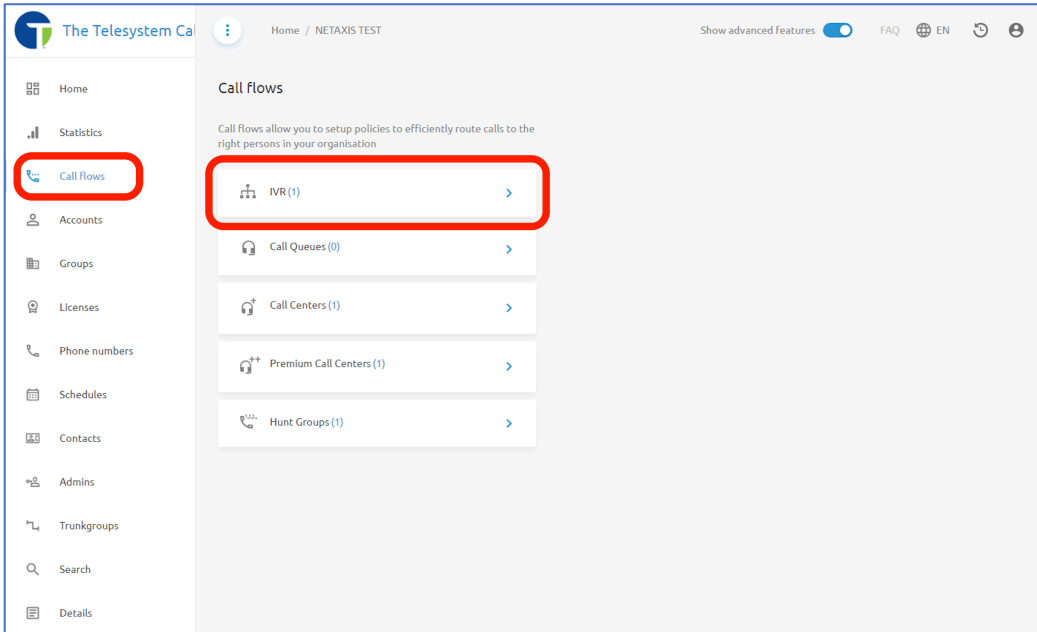
Once you have stopped recording, you will have the option to playback what you have recorded. If you are satisfied with the recording, provide a name for the recording in the “Audio name” field and then click the **Save** button.




Auto Attendant/IVR Media Files

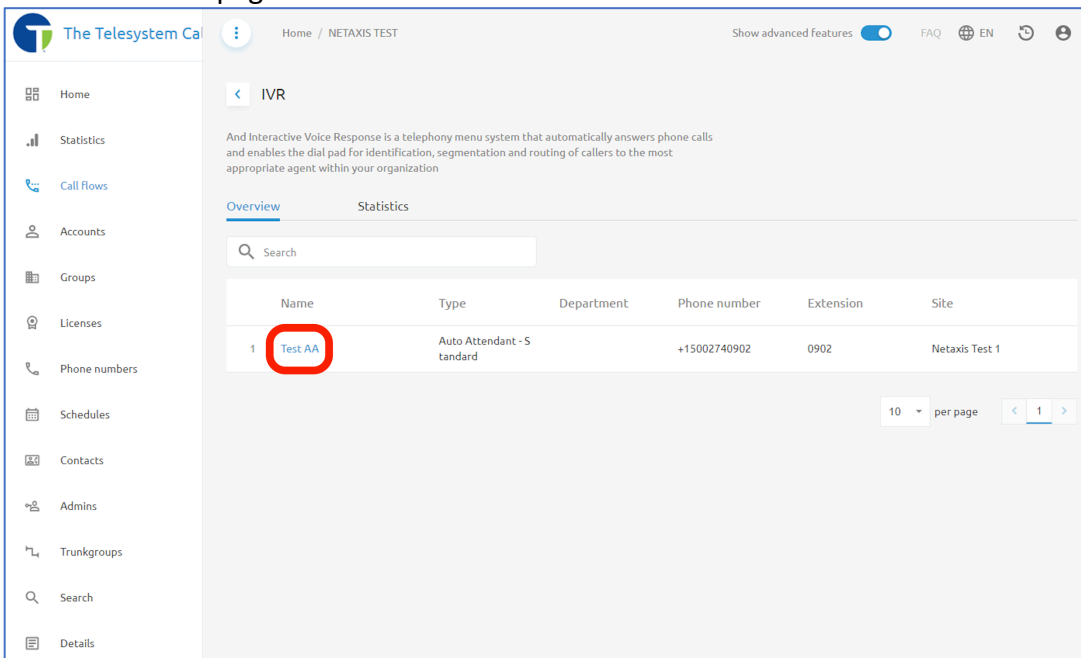
To access Auto Attendant/IVR Menu Audio Files:

1. Login to the Call Management Portal with your Enterprise or Group Admin Credentials.
2. At the Tenant or Group Level, go to the “Call Flows” menu in the left-hand navigation pane, then select “IVR”.



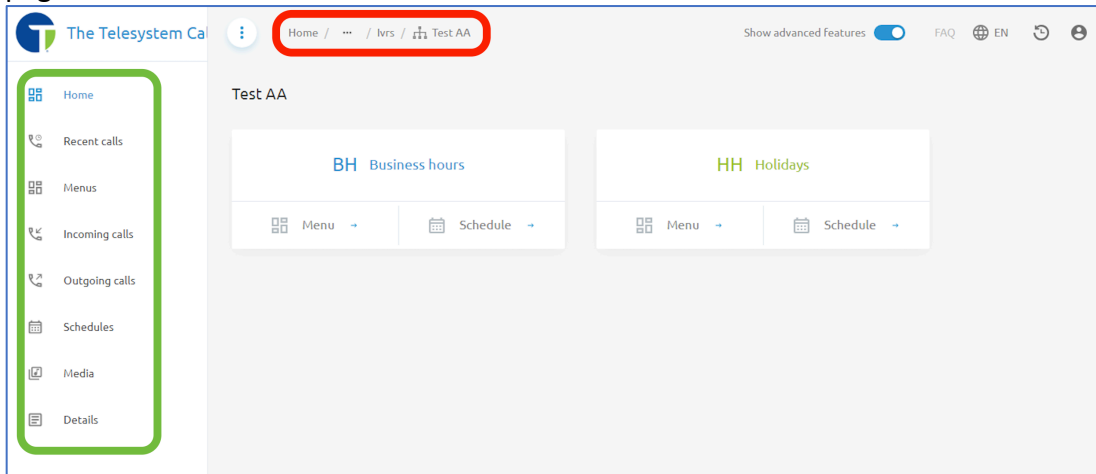
- a. NOTE: You can expand this navigation pane by clicking on the button at the top, left corner of the page that looks like this: 

3. Click on the name of the Auto Attendant/IVR you wish to manage. The name will be the blue text on the page.

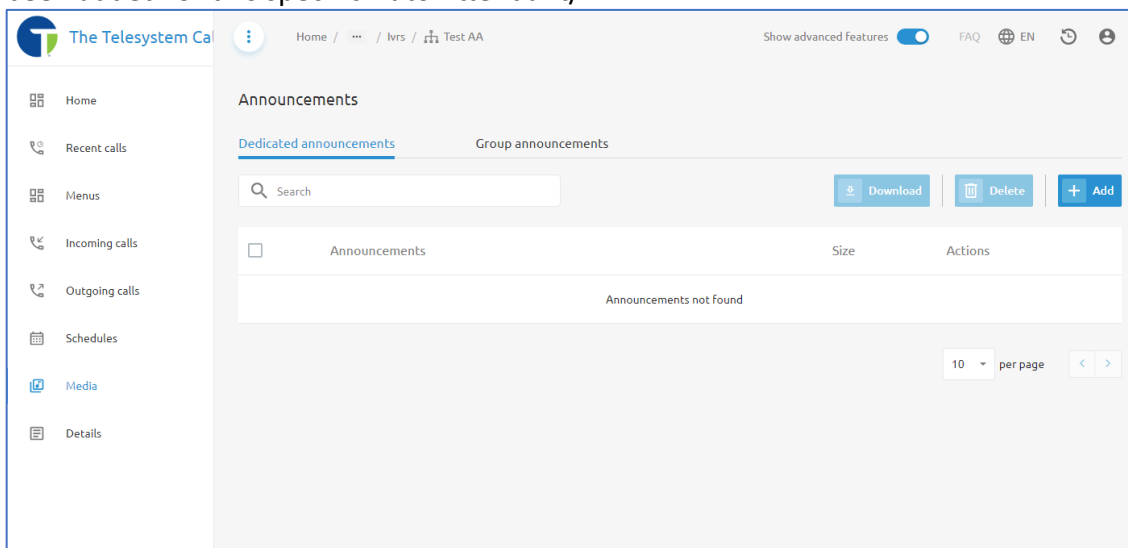


4. You are now in the Auto Attendant/IVR configuration menus. Take note that the menu options in the left-hand navigation pane have changed to provide options specific to this Auto Attendant's configuration.




Along the top of the page, you can use the menu path to navigate back to a previous page.



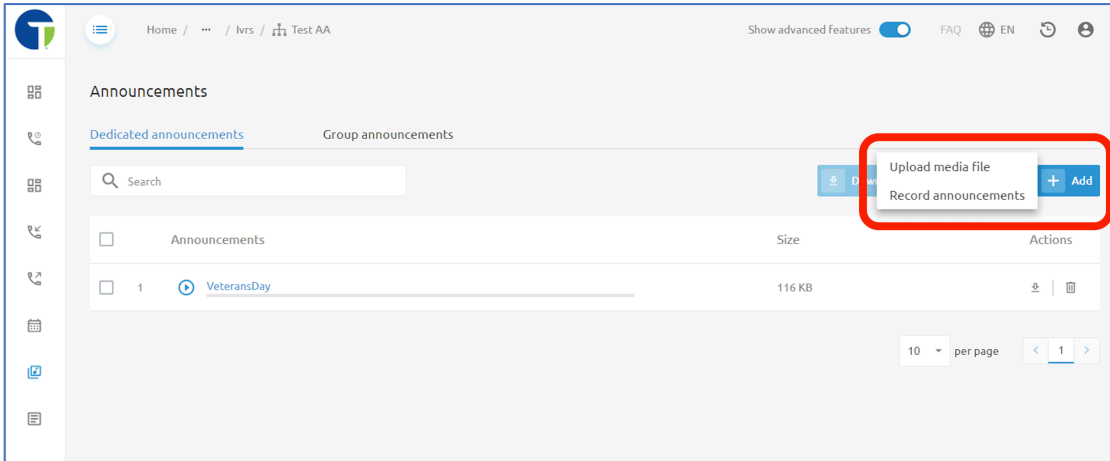
5. Click on the **Media** option in the left-hand navigation pane to access audio files that have been added for this specific Auto Attendant/IVR.




If you have an existing Auto Attendant that uses custom recorded audio messages today, but no announcements are found, it is likely those audio files were stored at the Group Level and not attached specifically to this Auto Attendant/IVR. Follow the instructions in the section above titled **Group Level Media Files** to manage those existing files.

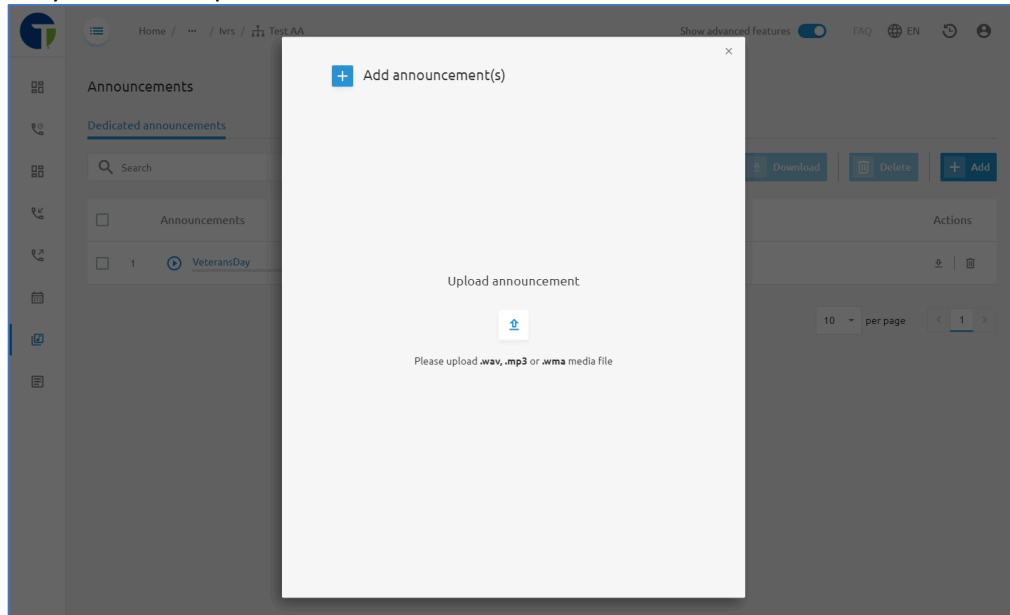
6. From the portal you can play  the audio file, download it , or delete it .

7. To add new files into the system, click the “+Add” button at the top, right-corner of the page, then choose if you want to upload a media file already saved on your desktop, or if you want to record announcement.



- a. **Upload media file** – When this option is selected you will receive a pop-up window advising you of the compatible file types (.wav, .mp3, or .wma media files).

Click the **Upload** button  to browser your computer’s file directory to locate the audio file you want to upload.

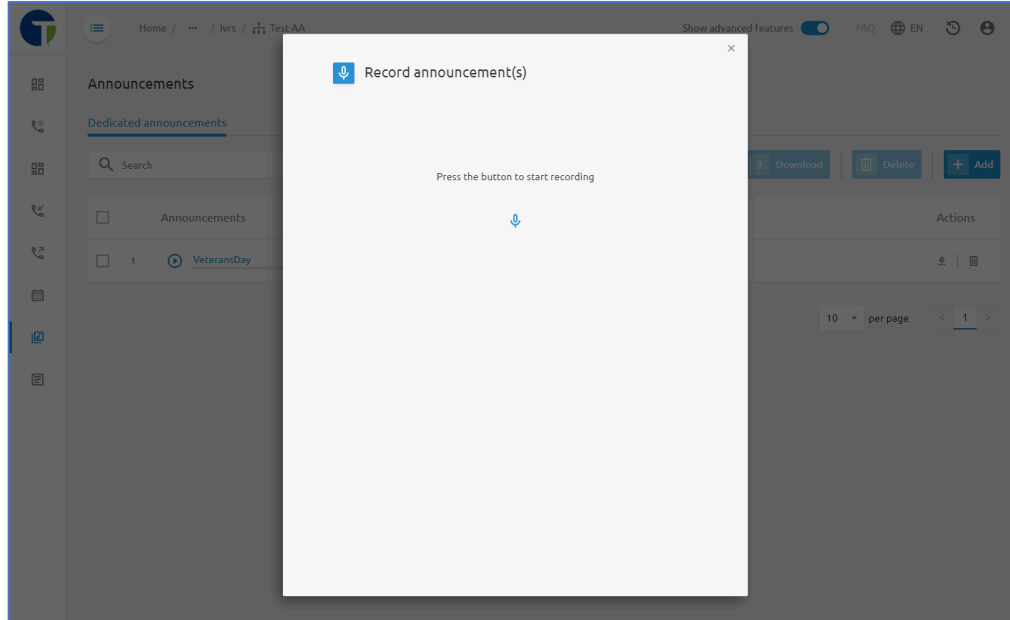



Locate the audio file, and open or select it from the file browser window to initiate the upload process.

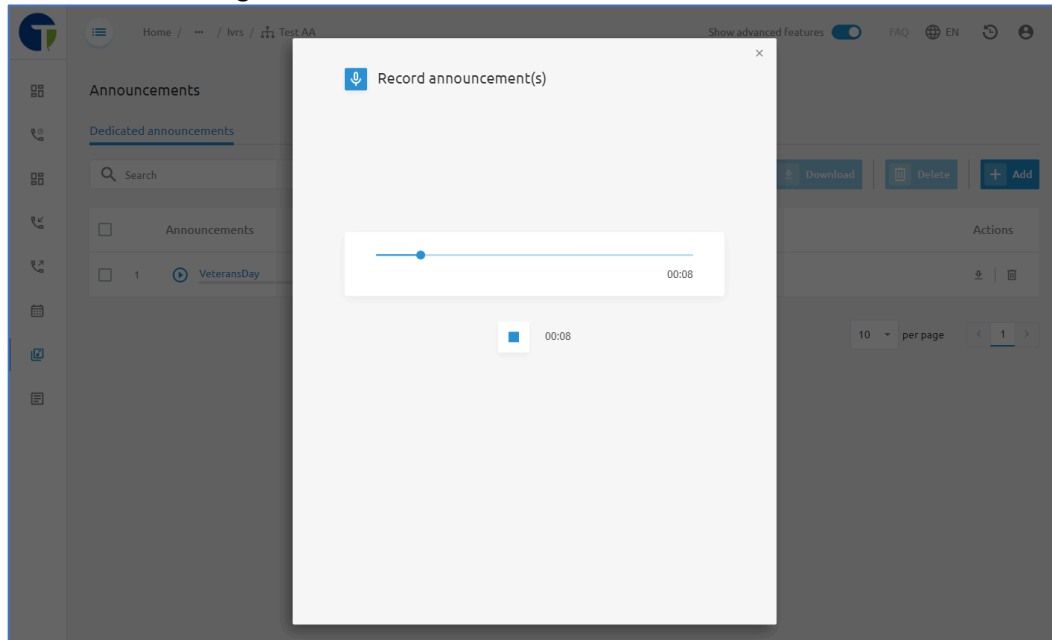
- b. Record Announcements - If you wish to record a new announcement you must be using a compatible web browser, we suggest Google Chrome or Mozilla Firefox.

You must also have a working microphone, and grant permission for the web page\browser to have access to your microphone to record.

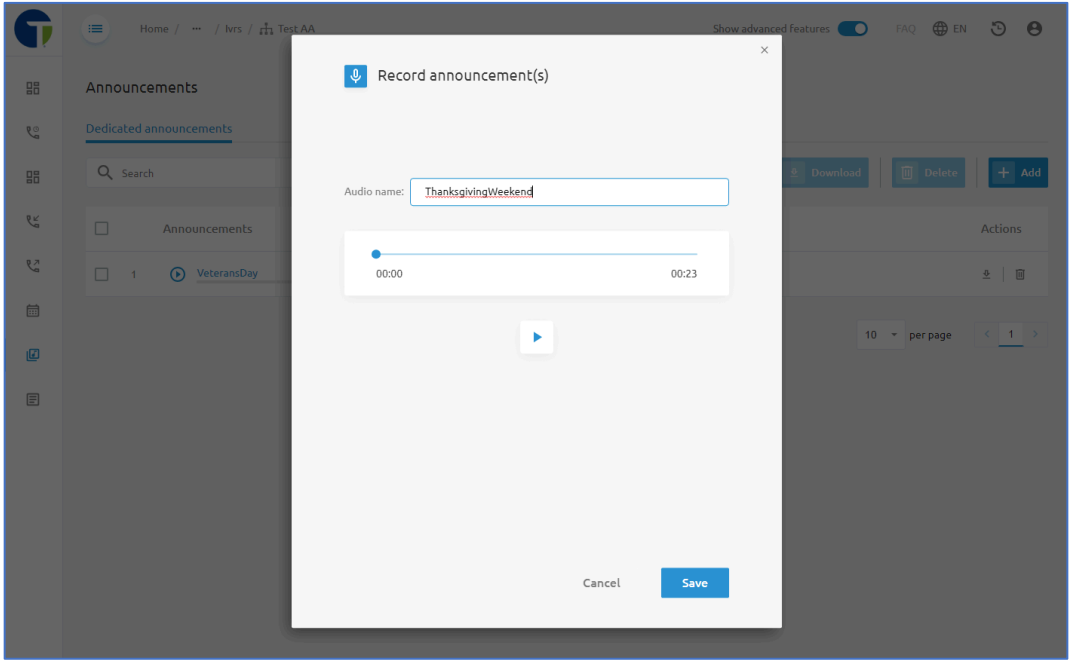
Press the **microphone** button  to begin recording.



When recording starts you will see the pop-up window will change, and you will now see a progress bar and a stop button. Speak clearly into the microphone and record your message. Only record what you want your callers to hear. Then press the stop button  to end the recording.



Once you have stopped recording, you will have the option to playback what you have recorded. If you are satisfied with the recording, provide a name for the recording in the “Audio name” field and then click the **Save** button.





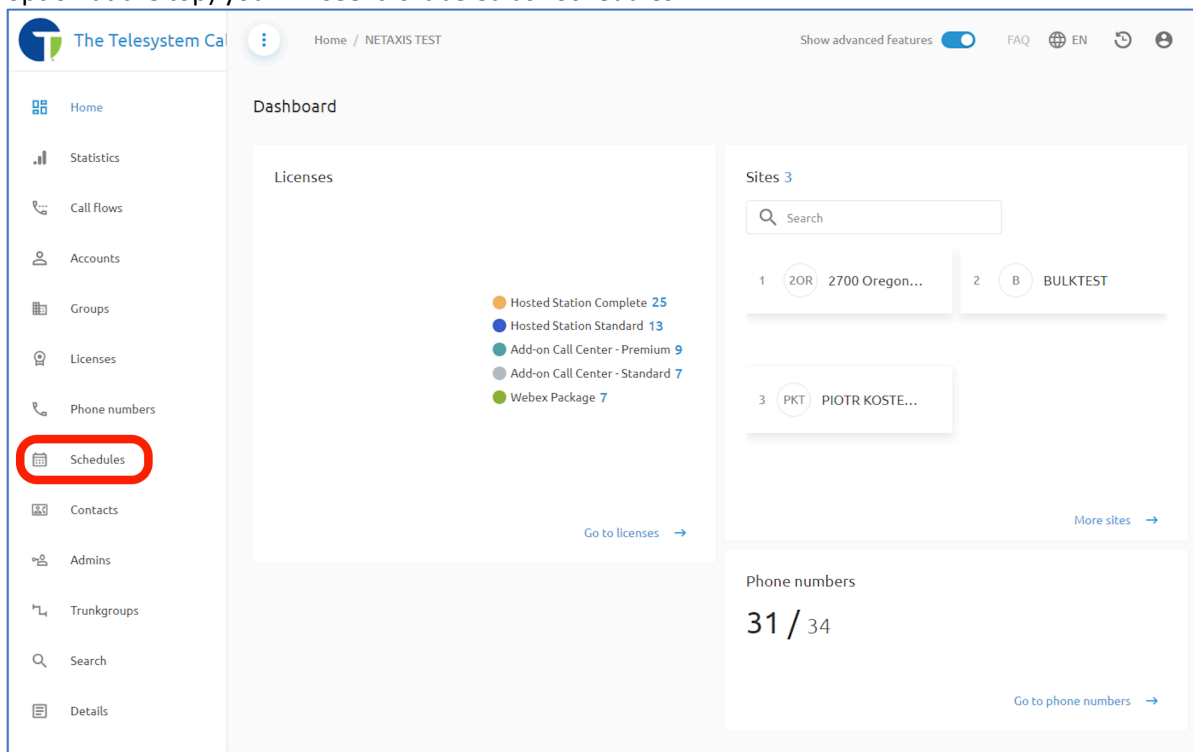
Schedules

Schedules are used to tell the system when your organization is operating under regular business hours, after hours, and holidays. Each auto attendant/IVR has menus that can be customized and configured to play different audio announcements and present your callers with different options based on the schedules you create.

Like **Media** files discussed in the previous section of this guide, **Schedules** can be configured in multiple locations at the **Enterprise** level, **Group** level, and then be assigned to an Auto Attendant/IVR.

Accessing Schedules from Enterprise or Group Level

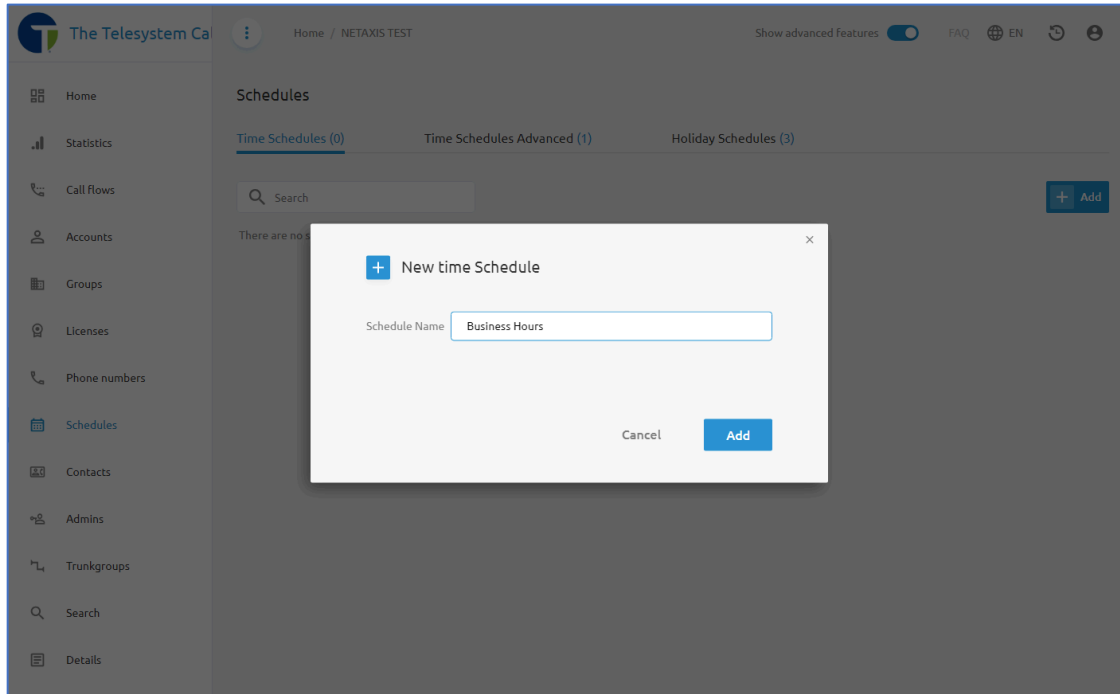
At the **Enterprise** or **Group** level, in the left-hand navigation pane, you can locate schedules by clicking on the calendar icon  in the navigation pane. If you have this menu expended (by clicking on the  option at the top) you will see it is labeled as “Schedules”.





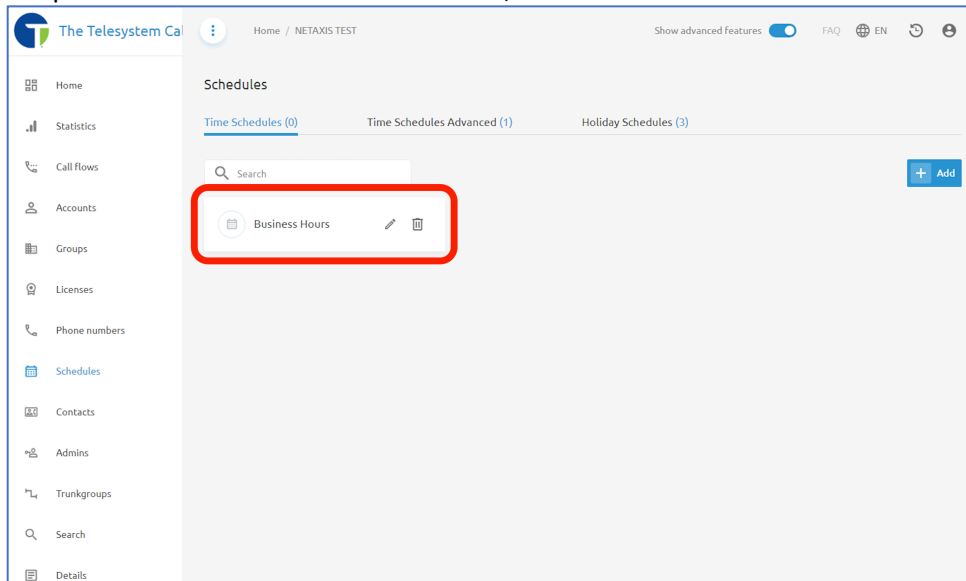
Schedules created here can be used for Auto Attendants/IVRs, as well as other group and user level features such as Call Forwarding Selective, Simultaneous Ring, and Call Centers/ACD.

Creating a New Schedule for Enterprise and Groups

From the **Schedules** menu, to add a new schedule, click the **+ Add** button on the right side of the page. Then enter a name for the schedule and click **Add**.

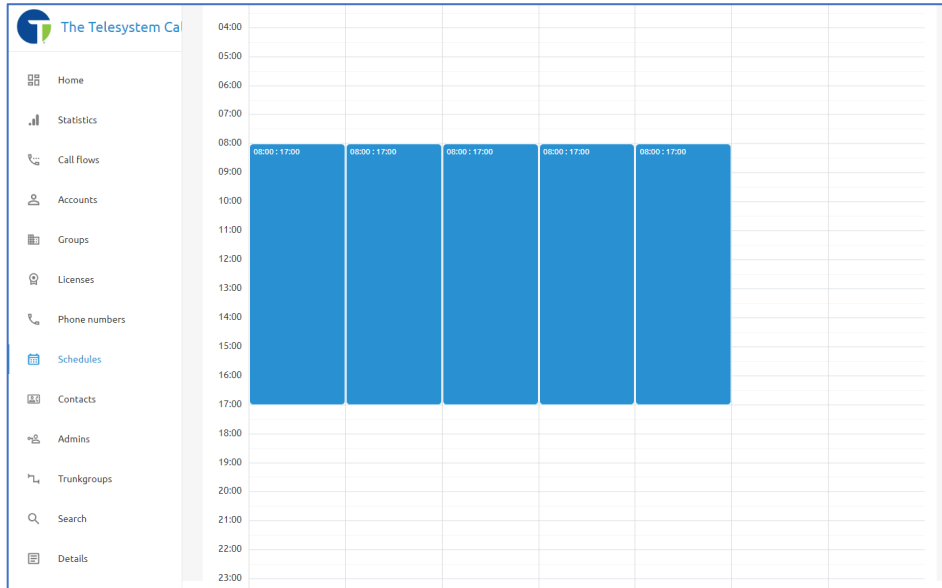


The schedule you just created will show on the page. Use the delete button  to remove the schedule, the pencil icon  to rename the schedule, or click on the name of the schedule to edit the schedule.



When you edit the schedule, you will be presented with a 7-day calendar week that starts with Monday and ends on Sunday. Block off the hours your organization is open to outline your business hours by clicking on the start time of the first day of your week, then dragging your mouse down to the end time. Don't worry if you don't click it exactly because you will be able to modify this to the specific minute after you are done.

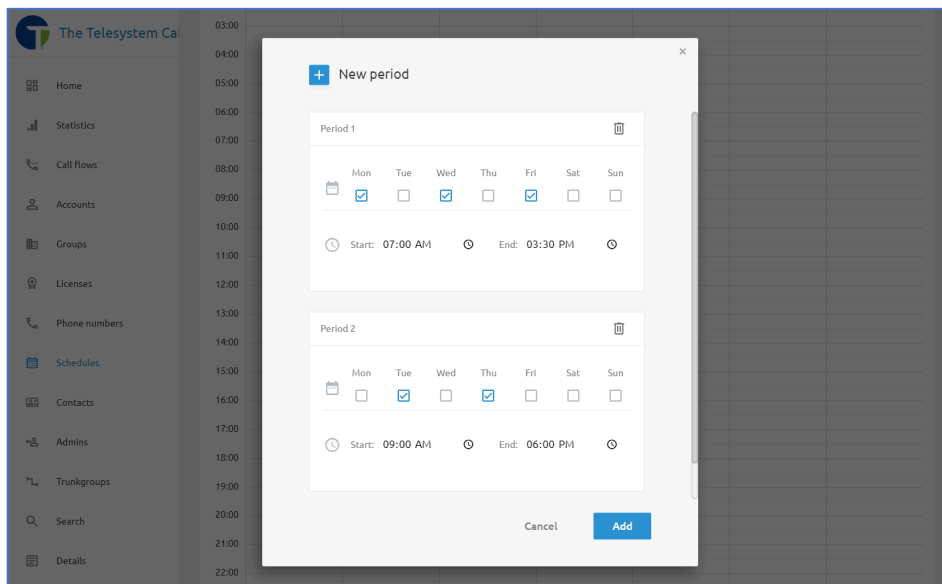
NOTE: The time uses a 24-hour configuration so afternoon hours are 13:00, 14:00, 15:00 etc.... If your organization's normal business hours are 8AM-5PM, Monday through Friday, you should have a schedule that looks like this:



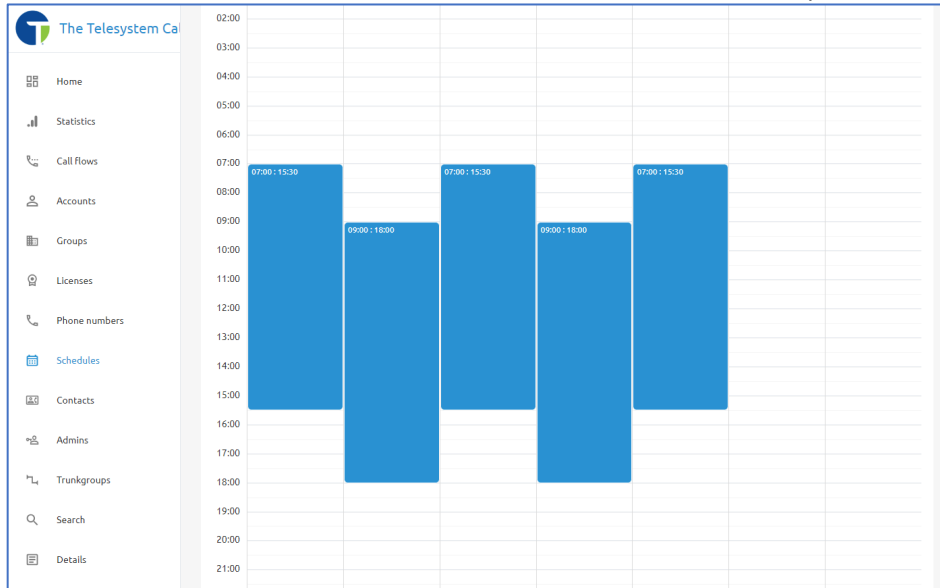
After you add hours to the first day you configure, the system will automatically show a pop-up window to allow you to apply the same hours to multiple days of the week and adjust the time frame using your keyboard to make it easier if you need to get specific about the times you are outlining.

You can also add multiple periods by click the **+Add** button in the pop-up window if your business has hours that differ by day.

If I wish to make a schedule that shows my organization is open from 7am-3:30pm Monday, Wednesday, and Friday, and 9am-6pm on Tuesdays and Thursday, I would adjust the this window to look like this:

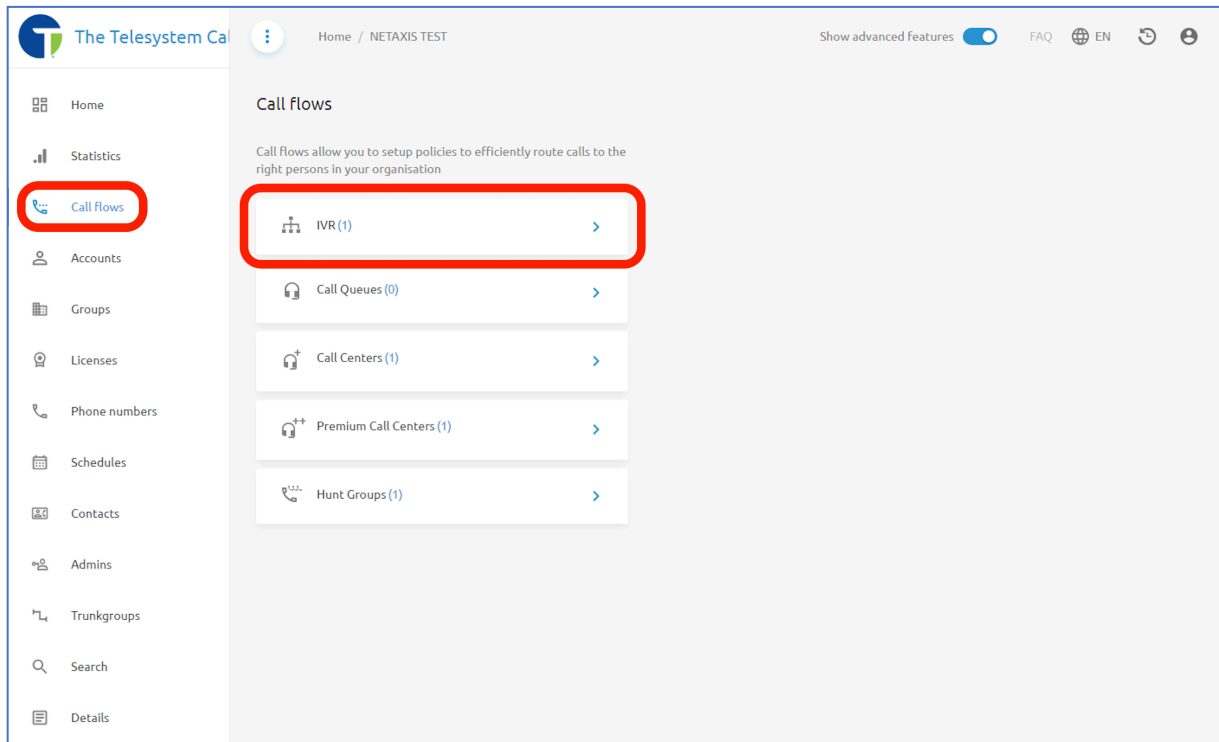


Once I click the **Add** button at the bottom, I will see the schedule represented on the week view like this:



Accessing Schedules from the Call Flows>IVR Menu

To access from the Auto Attendant/IVR, go to the **Call Flows** menu by clicking on the associated icon . Then click **IVR**.



Click on the name of the Auto Attendant/IVR you wish to manage. Click directly on the blue text.

IVR

And Interactive Voice Response is a telephony menu system that automatically answers phone calls and enables the dial pad for identification, segmentation and routing of callers to the most appropriate agent within your organization

Overview Statistics

Search

Name	Type	Department	Phone number	Extension	Site
1 Test AA	Auto Attendant - Standard		+15002740902	0902	Netaxis Test 1

10 per page 1

You are now in the Auto Attendant/IVR menu. Options in the left-hand navigation pane have changed to provide menu options that are specific to the Auto Attendant/IVR you have selected. One of those menu options is **Schedules**. Click on that to manage the schedules for your auto attendant/IVR.

The Telesystem Call Center

Home / ... / Ivrs / Test AA

Show advanced features FAQ EN

Home Recent calls Menus Incoming calls Outgoing calls Schedules Media Details

Schedule

Business hours Holiday

Use business hours

Business hours MWF

Save Cancel

	Mon 07 Aug	Tue 08 Aug	Wed 09 Aug	Thu 10 Aug	Fri 11 Aug	Sat 12 Aug	Sun 13 Aug
01:00							
02:00							
03:00							
04:00							

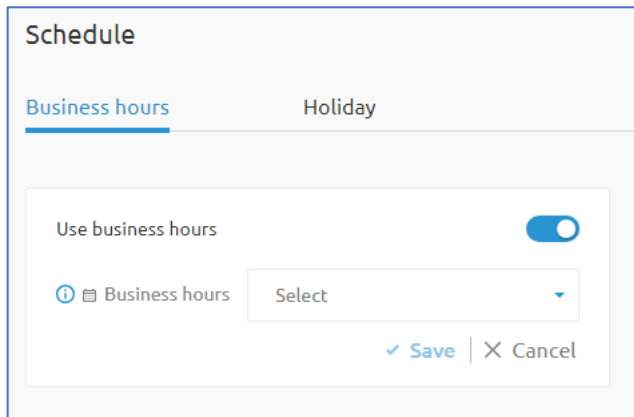
Assign a Schedule to an Auto Attendant/IVR

When you apply a schedule to an auto attendant for Business Hours, you are defining what hours your business or organization operates in, typically referred to as “Open Hours”. Any time that is not defined in the schedule when applied to the **Business Hours** menu is automatically considered “Closed Hours” and the **After hours** menu will automatically play.

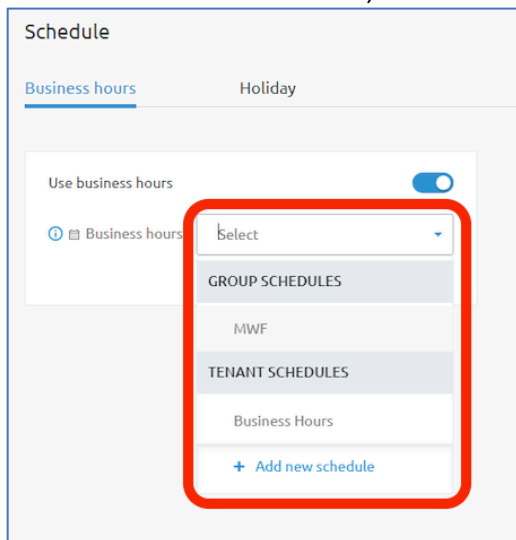
In the Auto Attendant/IVR menu, click on the **Schedules** menu option. The system will automatically take you into the **Business Hours** menu.

At the top of this page, you will see a toggle switch to enable/disable “Use business hours”. If you choose to disable this, the IVR will no longer use the business hours schedule and your menu options will not change based on a routing schedule.

When this toggle is enabled and showing blue, then a selection for Business Hours becomes available as seen below.

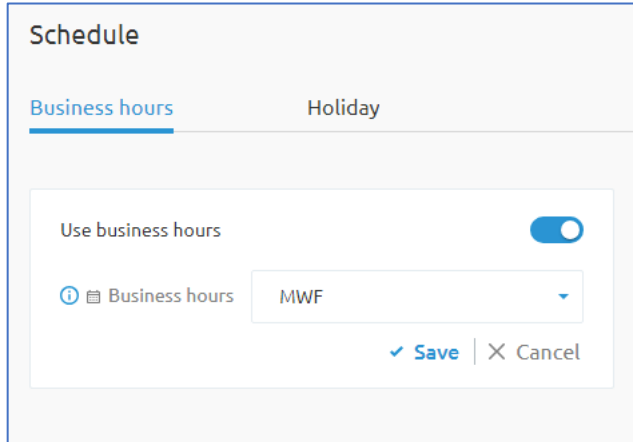


Use the drop-down box to select the schedule you wish to assign. You may see sections for **Group Schedules** and **Tenant Schedules** with a listing of the available schedules configured for each of those sections. There will also be an option to **Add new schedule** if you wish to create one at this time. If you add a new schedule from here, it will be added to the **Group Schedules** location.



NOTE: The only **Group Schedules** that will display will be schedules created in the group that also contains the Auto Attendant/IVR you are working on. If your organization has multiple groups that represent each location but all of them need to use the same schedule, create the schedule at the Tenant/Enterprise level.

Select the schedule you want to assign to this Auto Attendant/IVR and then click **Save**.



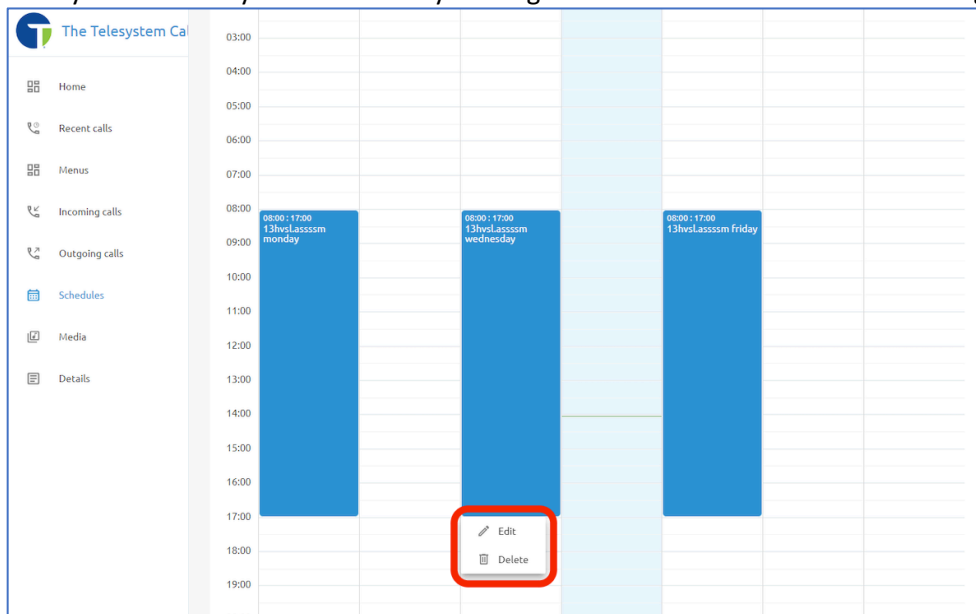
The screenshot shows a 'Schedule' configuration window with two tabs: 'Business hours' (selected) and 'Holiday'. Under 'Business hours', there is a toggle switch for 'Use business hours' which is turned on. Below the toggle is a dropdown menu labeled 'Business hours' with 'MWF' selected. At the bottom of the window, there are two buttons: 'Save' (with a checkmark icon) and 'Cancel' (with an X icon).

After you save your changes, a preview of the schedule in the week view will display. You can now modify the schedule as needed as well using the instructions in the next section of this guide.

Editing a Schedule in the Auto Attendant/IVR menu

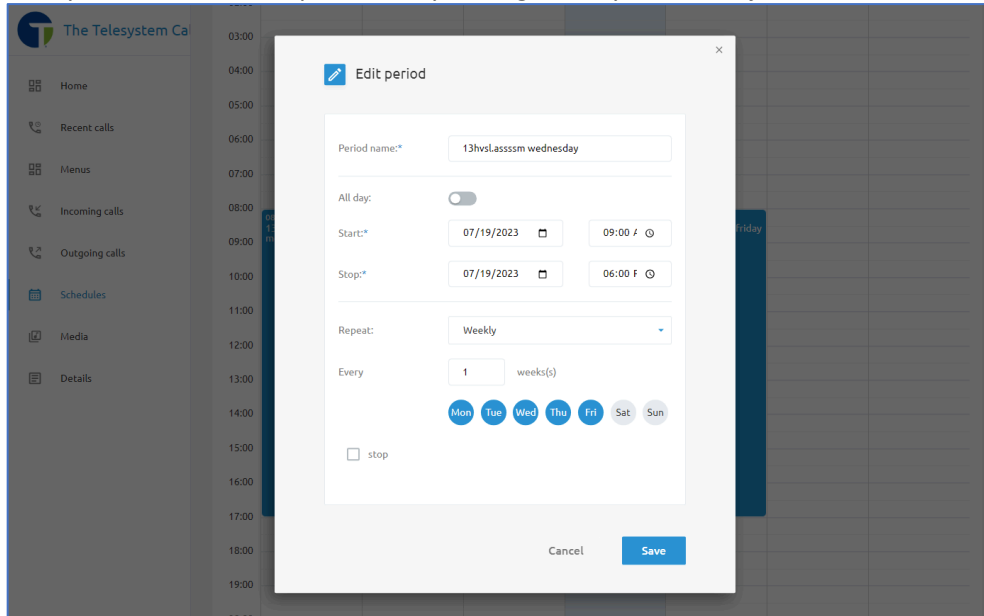
In the Auto Attendant/IVR menu, click on the **Schedules** menu option. The system will automatically take you into the **Business Hours** menu.

Here you can modify the schedule by clicking on a block of time and then choosing to **Edit**.

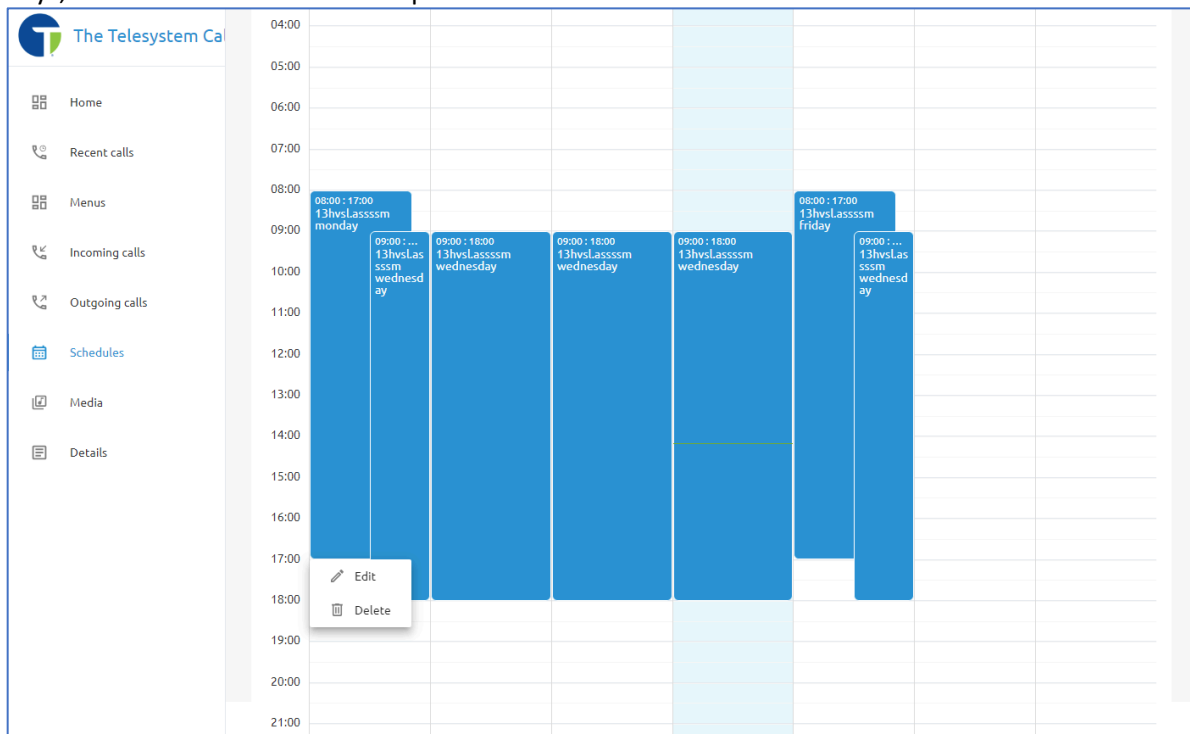


Once you click the **Edit** option you will have the ability to modify the start and stop times and dates and apply your changes to multiple days of the week as needed.

For example, if we wanted to change the configuration from 8am-5pm on Mondays, Wednesdays, and Fridays to now be 9am-6pm Monday through Friday we can adjust it like so:



Note that making this change will not overwrite existing scheduled time you have on those existing days. So, in our previous example, we still need to go back and delete the existing scheduled time on Monday and Friday that was previously 8am-5pm. Do this by clicking on the scheduled time for each of those days, and then select the **Delete** option.



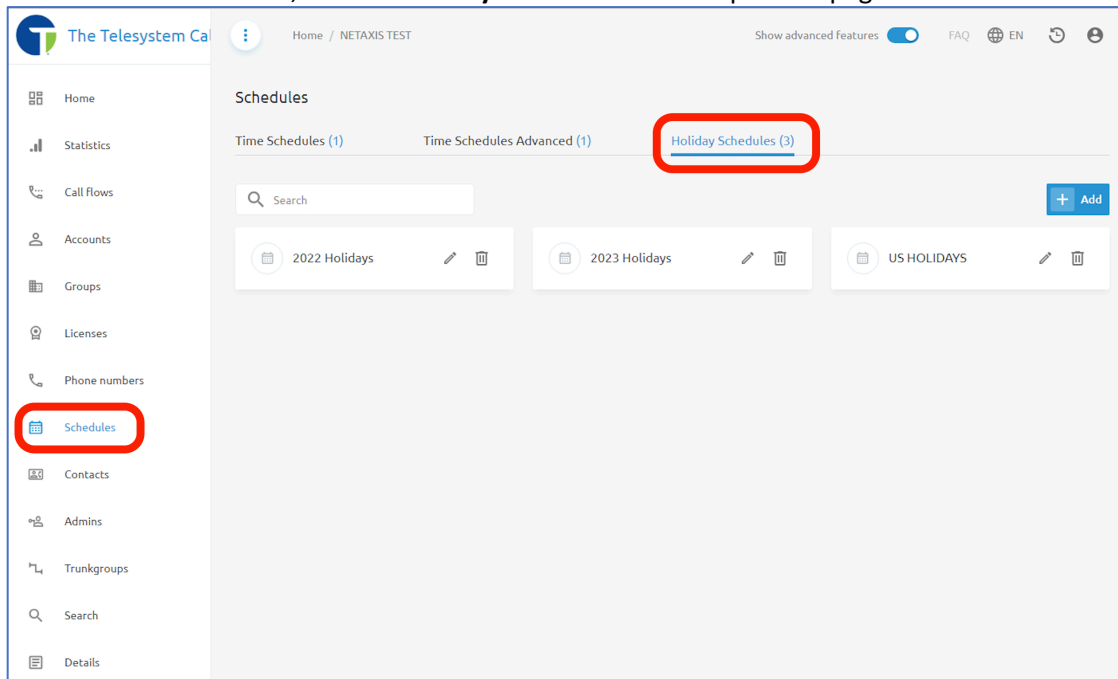
Holiday Schedules



Holiday schedules determine when an Auto Attendant/IVR plays the options in the **Holidays** menu. Many organizations prefer to have a holiday menu playing to callers on days they are closed for business in observance of a holiday, or if their menu options need to change because certain departments are not available during those holidays. The dates defined in the holiday schedule will override the schedule assigned to the **Business Hours** menu and the **After hours** menu.

Holiday Schedules can be managed from the same **Schedules** menu as the business hours schedules at the **Enterprise** and **Group** levels.

When setting up holiday schedules, it is best practice to create all your holidays for the calendar year under a single schedule so that you only need to set it up once annually and apply it to your Auto Attendant(s). If you have multiple Auto Attendants across multiple groups that use the same holidays, we recommend that you configure your schedule at the Enterprise/Tenant level.

On the **Schedules** menu, click on **Holiday Schedules** at the top of the page.

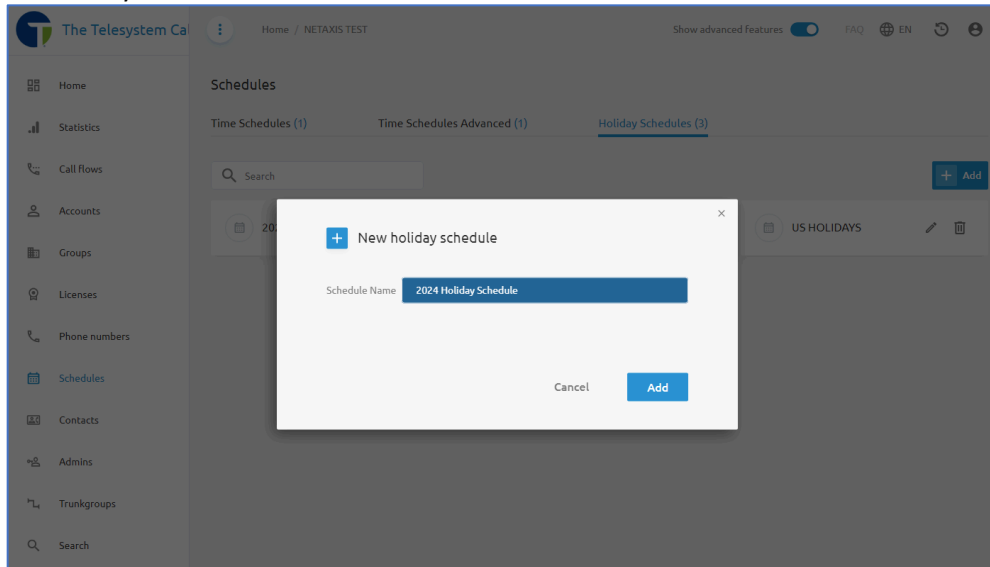


Here you can modify any existing schedules by clicking on the name of the schedule. Names of schedules can be edited using the pencil icon , and schedules can be deleted using the trash can icon .

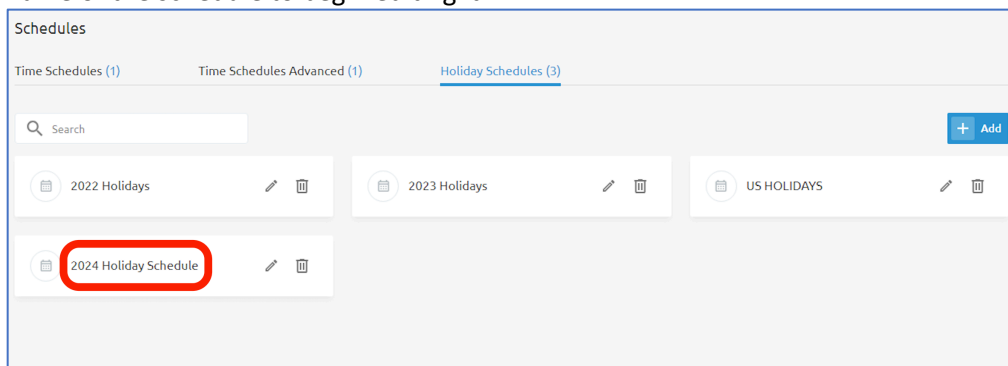
NOTE: Schedules currently in use or assigned to a feature cannot be deleted until they have been unassigned.

Add a New Holiday Schedule

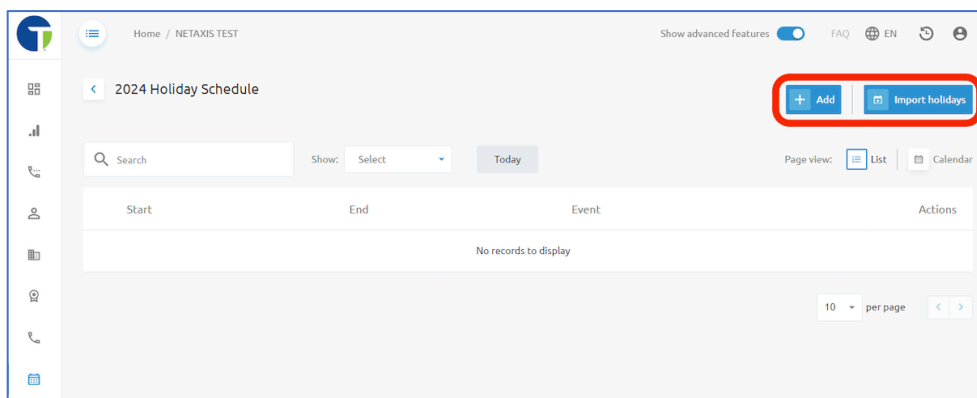
Click the **+Add** button at the top, right of the **Holiday Schedules** menu. In the pop-up window, provide a name for your schedule. Click the **Add** button to save the schedule.



Your new Holiday Schedule will appear in the view with the other existing Holiday Schedules. Click on the name of the schedule to begin editing it.



When editing the holiday schedule, you can manually add your company holidays in individually using the **+Add** button or you can automatically fill in national holidays using the **Import holidays** button and then edit the holidays that your organization does not modify the Auto Attendant/IVR for.



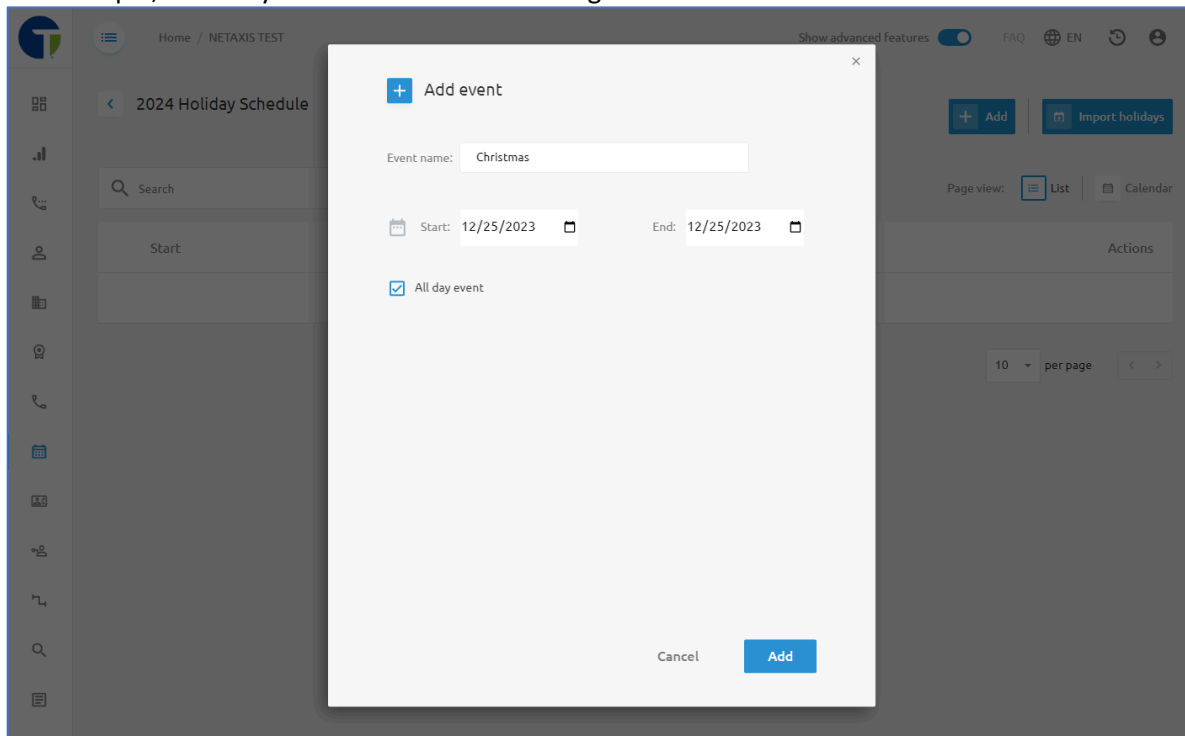
Adding Holidays Manually

When you add Holidays to the schedule manually, you begin by clicking on the **+Add** button. A pop-up window will prompt you for the following information:

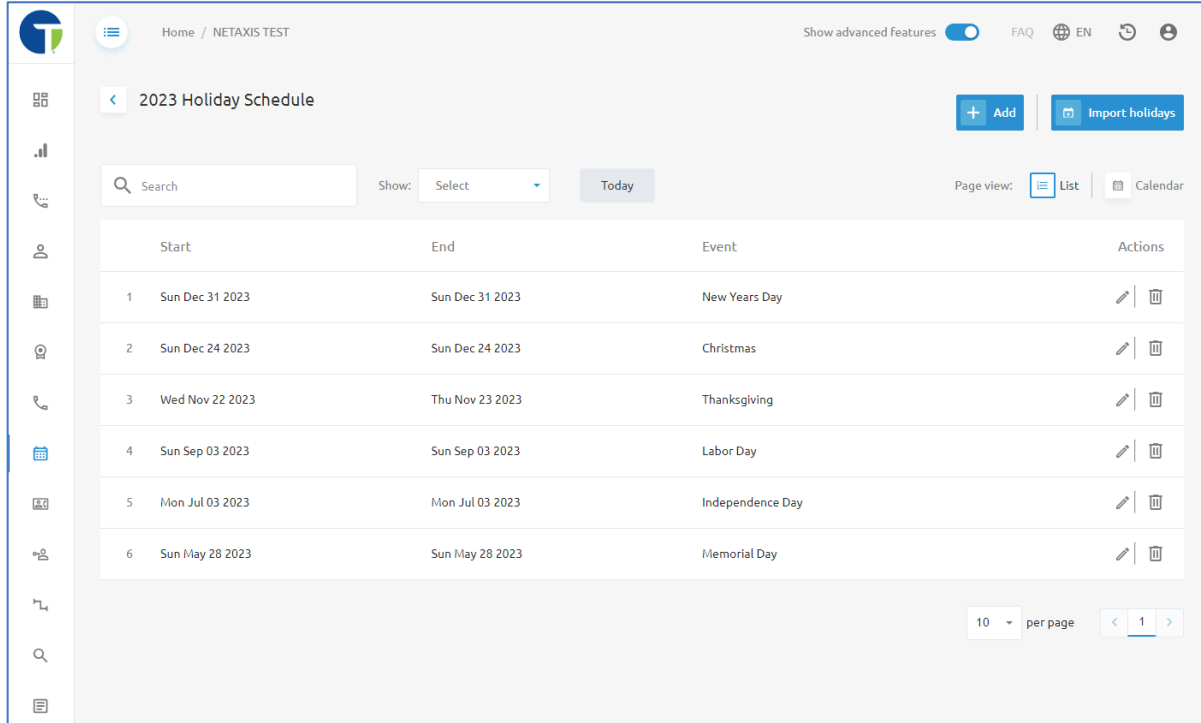
- Event Name
- Start Date
- End Date
- All day events.
- Start Time
- End Time

Fill in the available fields about a single holiday, then click the **Add** button at the bottom of the pop-up window.

For example, a holiday schedule for Christmas might look like this:

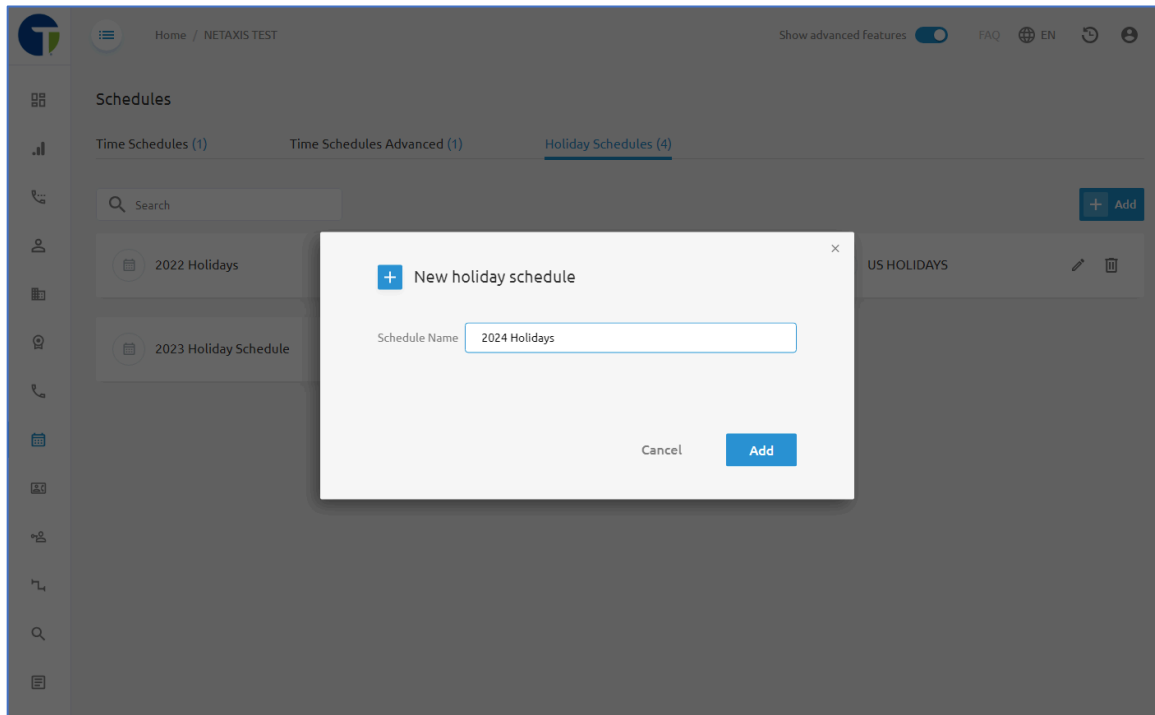


Once you've added that event, you can use the **+Add** button to add another event and have all events for your calendar year on a single Holiday schedule like this:

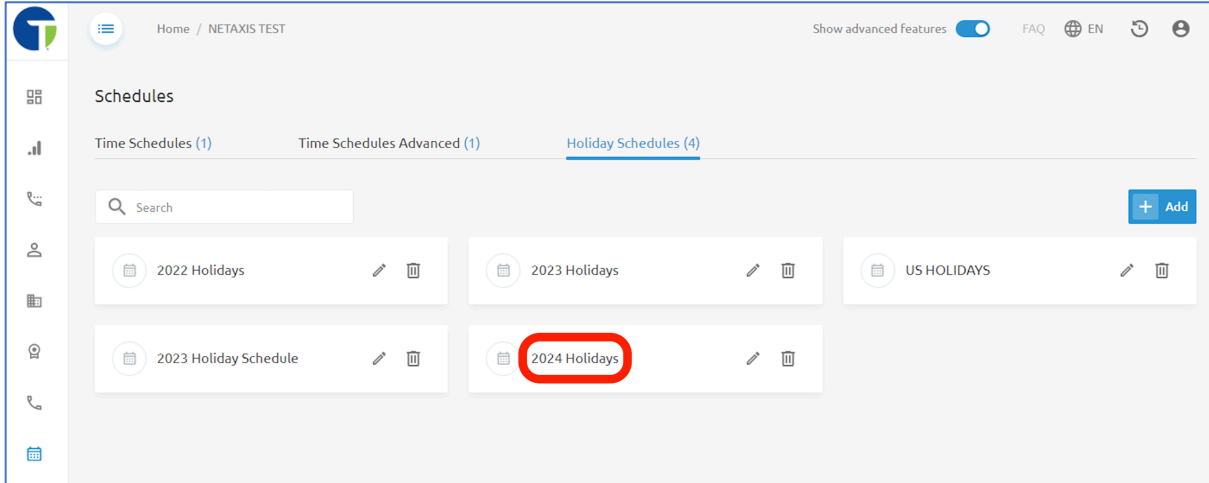


Importing Holidays

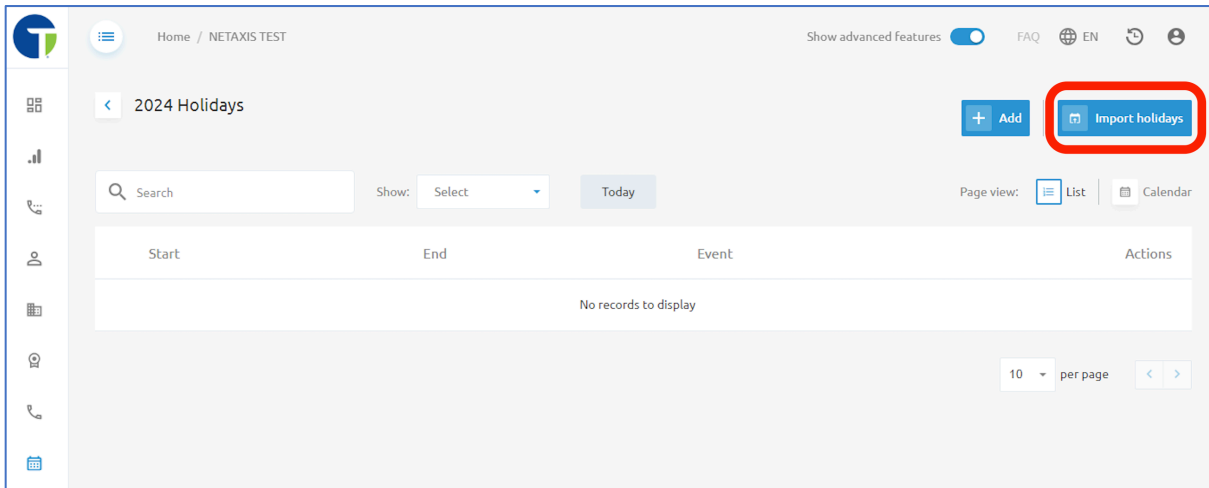
If you would like to import all holidays for the schedule, start by click on the **+Add** button at the top, right of the page to create a new schedule. Provide it with a name in the **New holiday schedule** pop-up window and then click the **Add** button to save it.



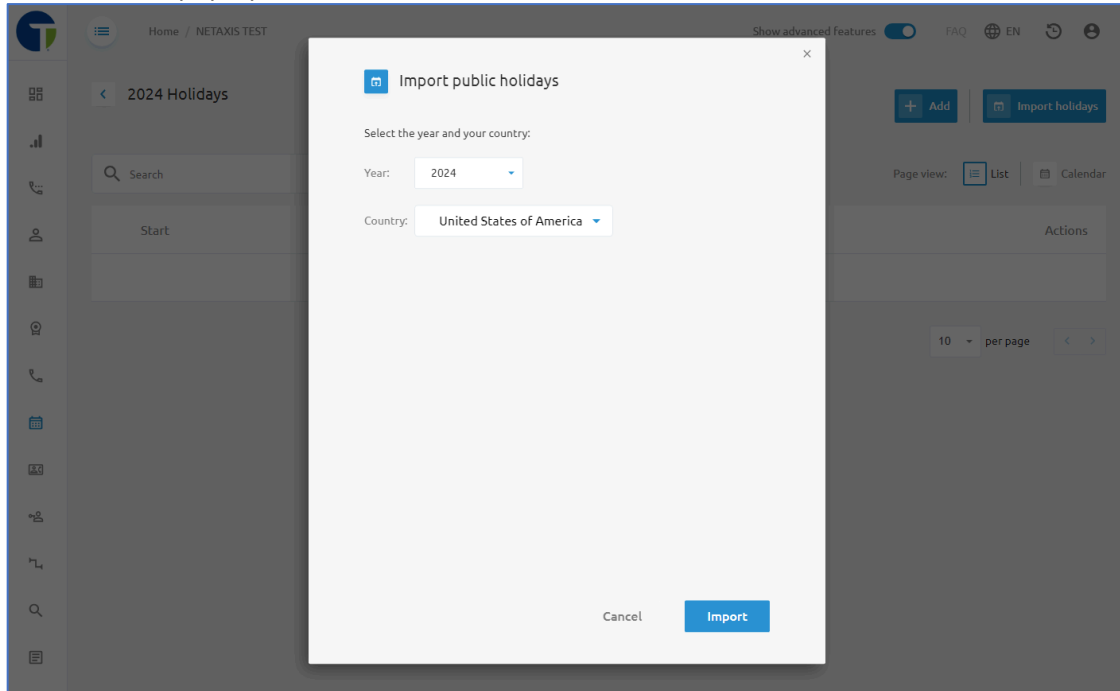
Your new schedule will show in the **Holiday Schedules** menu with any existing schedules. Click on the name you provided to that new schedule to edit it.























In this page where you may add events to the schedule, click on the **Import holidays** button at the top, right corner of the page.



Select the year you wish to import holidays for and the country you are getting the holiday schedule for (currently the only country option is United States of America). Then click the blue **Import** button at the bottom of the pop-up window.

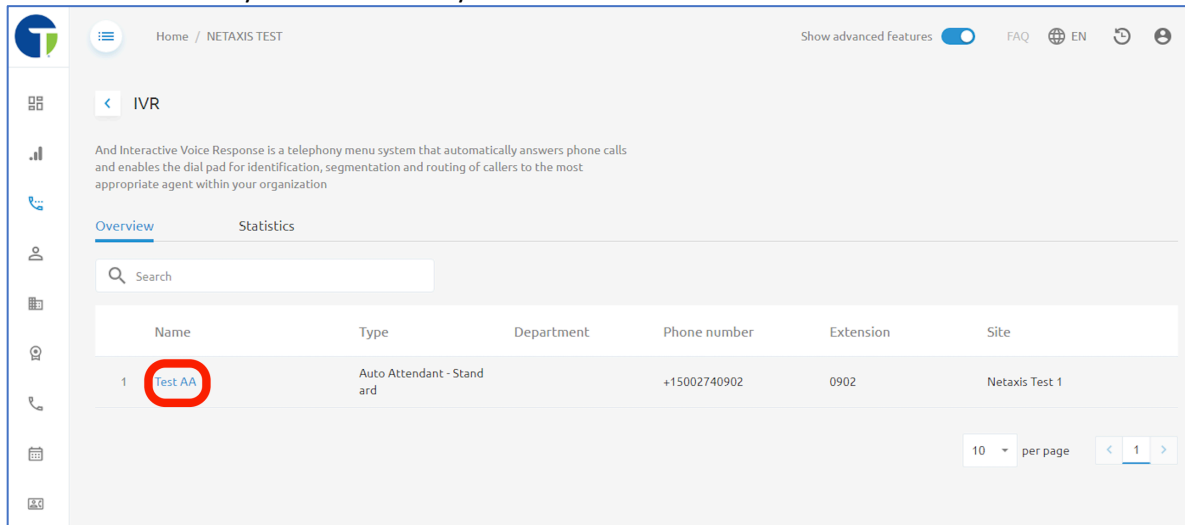


All holidays will auto populate into your schedule. Use the trash can icon  on the far, right of the page to delete any holidays that would not require a routing change for your Auto Attendant/IVR. Use the pencil icon  to modify any of the holidays that have been imported to adjust the date or time. Use the **+Add** button to add holidays that your organization does observe but that were not on the imported list.

	Start ↑	End	Event	Actions
9	Sun Dec 31 2023	Sun Dec 31 2023	New Year's Day - 2024	 
8	Sun Jan 14 2024	Sun Jan 14 2024	Martin Luther King Jr. Day - 2024	 
7	Sun May 26 2024	Sun May 26 2024	Memorial Day - 2024	 
6	Wed Jul 03 2024	Wed Jul 03 2024	Independence Day - 2024	 
5	Sun Sep 01 2024	Sun Sep 01 2024	Labor Day - 2024	 
4	Sun Oct 13 2024	Sun Oct 13 2024	Columbus Day - 2024	 
3	Sun Nov 10 2024	Sun Nov 10 2024	Veterans Day - 2024	 
2	Wed Nov 27 2024	Wed Nov 27 2024	Thanksgiving - 2024	 
1	Tue Dec 24 2024	Tue Dec 24 2024	Christmas Day - 2024	 

Assign a Holiday Schedule to an Auto Attendant

Now that you have created your holiday schedule, you can assign it to your Auto Attendant. Start by accessing your Auto Attendant through the **Call Flows** menu, select **IVR** and then click on the name of the Auto Attendant you wish to modify.

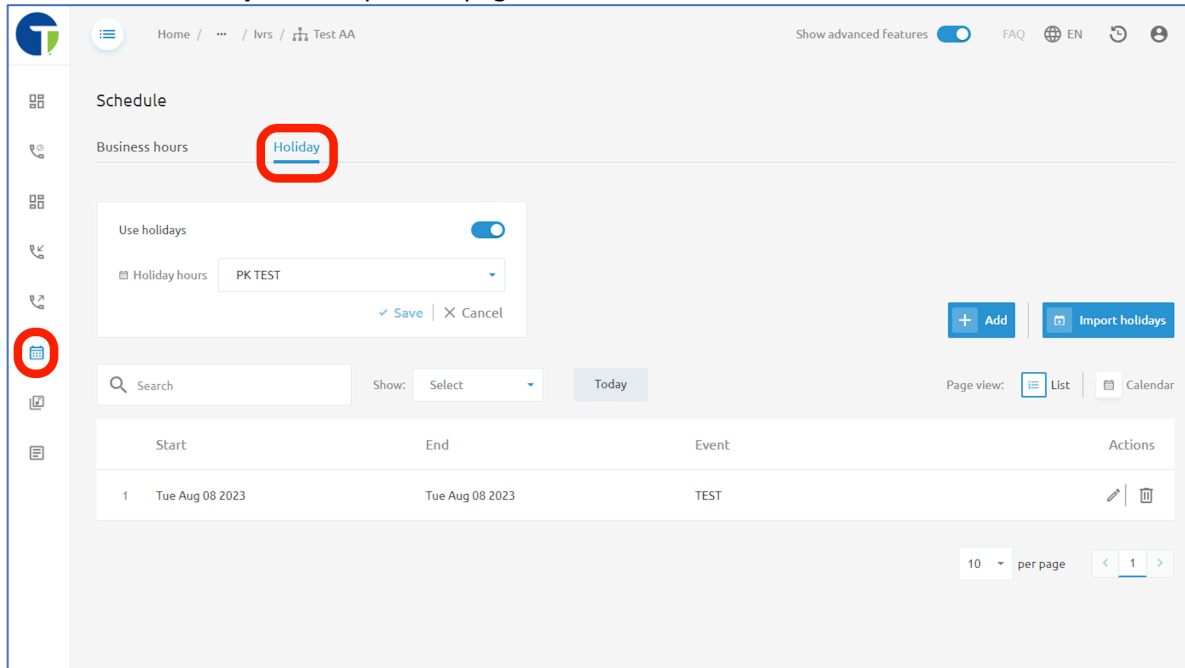


The screenshot shows the 'IVR' configuration page. At the top, there is a navigation bar with 'Home / NETAXIS TEST' and 'Show advanced features' toggle. Below the navigation, there is a description of IVR and two tabs: 'Overview' and 'Statistics'. A search bar is present. Below the search bar is a table with the following data:



Name	Type	Department	Phone number	Extension	Site
1 Test AA	Auto Attendant - Standard		+15002740902	0902	Netaxis Test 1

The 'Test AA' entry in the table is circled in red. At the bottom right, there is a pagination control showing '10 per page' and page number '1'.

Click on **Schedule** under the Holidays menu or go to the **Schedules** menu in the left navigation pane, then click on **Holiday** at the top of the page.



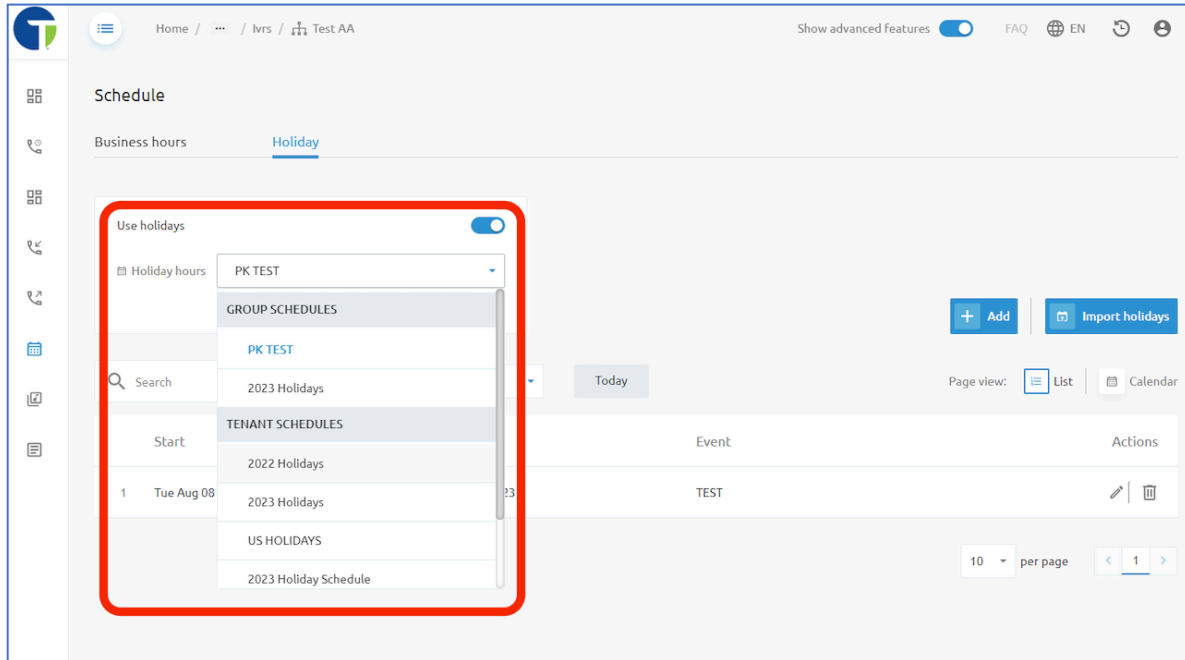
The screenshot shows the 'Schedule' configuration page. At the top, there is a navigation bar with 'Home / ... / Ivr / Test AA' and 'Show advanced features' toggle. Below the navigation, there is a 'Schedule' section with 'Business hours' and a 'Holiday' tab circled in red. Below the 'Holiday' tab, there is a form with 'Use holidays' toggle (checked), 'Holiday hours' dropdown (PK TEST), and 'Save' and 'Cancel' buttons. To the right, there are 'Add' and 'Import holidays' buttons. Below the form, there is a search bar, 'Show: Select' dropdown, and 'Today' button. To the right, there is a 'Page view: List | Calendar' selector. Below this is a table with the following data:

Start	End	Event	Actions
1 Tue Aug 08 2023	Tue Aug 08 2023	TEST	 

The 'Holiday' tab is circled in red. In the left navigation pane, the calendar icon is also circled in red. At the bottom right, there is a pagination control showing '10 per page' and page number '1'.

In the box at the top, there is a toggle switch labeled **Use holidays**. When this is disabled, no holiday schedule will be considered and your Auto Attendant/IVR will only operate on your business hours and after hours menus based on if a business hours schedule has been applied.

When the **Use holidays** toggle switch is enabled (it will show blue) then you will also have a drop-down box allowing you to choose which holiday schedule you would like to apply to your Auto Attendant/IVR.



Just like the business hours schedules discussed previously in this guide, holiday schedules could fall under **Group Schedules** on **Tenant (Enterprise) Schedules**. Available group schedules will be limited to only schedules created in the same group as your Auto Attendant/IVR, which Tenant Schedules are created at a higher level in the hierarchy of the platform and are available to all groups within the tenant/enterprise. You also have an option here to create a new holiday schedule. If you choose to create a new holiday schedule from here, it will be added to your group schedules. Configuration information can be found in the previous section of this guide labeled **“Add a New Holiday Schedule”**.

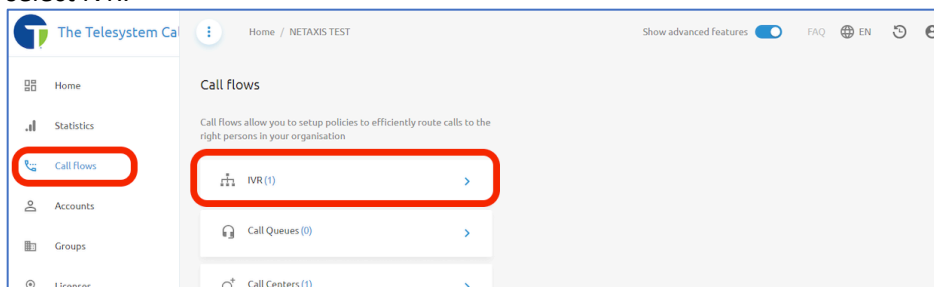
Managing Auto Attendant Menus

The Auto Attendants/IVRs can be configured to allow for administrators to assign specific actions to any key on a standard telephone dial pad. Each Auto Attendant comes with the following menus:

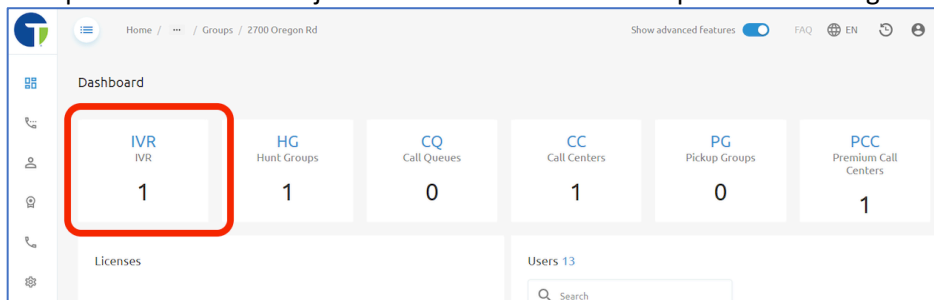
- 1 Business Hours menu
- 1 After hours menu
- 1 Holiday menu
- Submenus

To access the Auto Attendant menus, you must be logged into the Call Management Portal as an Enterprise or Group level administrator with the appropriate credentials.

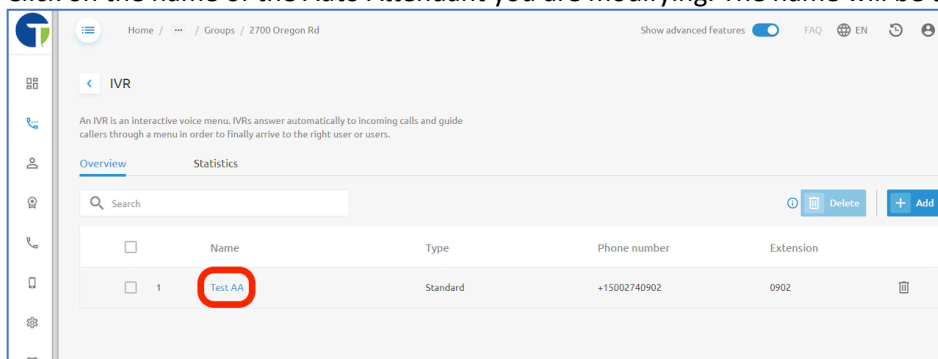
Enterprise administrators can click on the Call Flows option in the left-hand navigation pane, and then select IVR.



Group administrators can just click on IVR from the Group Dashboard to get to the IVR menu.

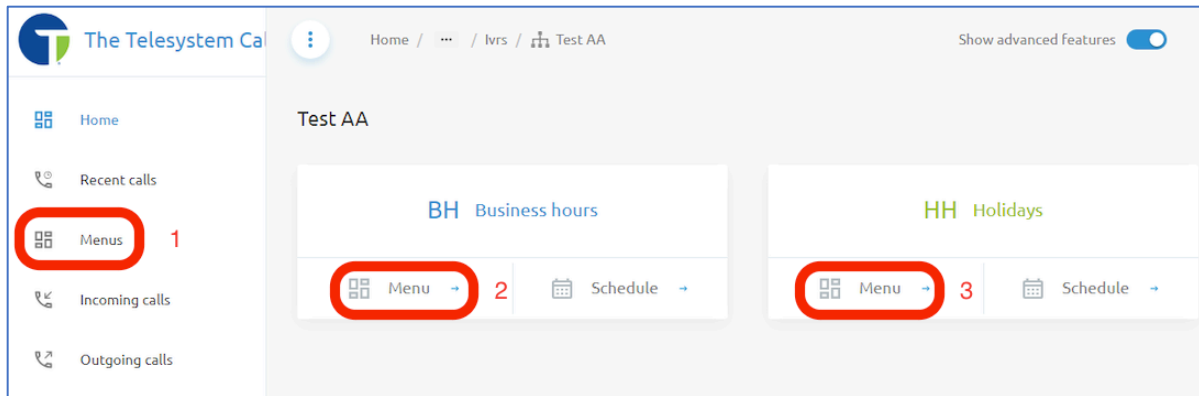


Click on the name of the Auto Attendant you are modifying. The name will be the blue text on the page.

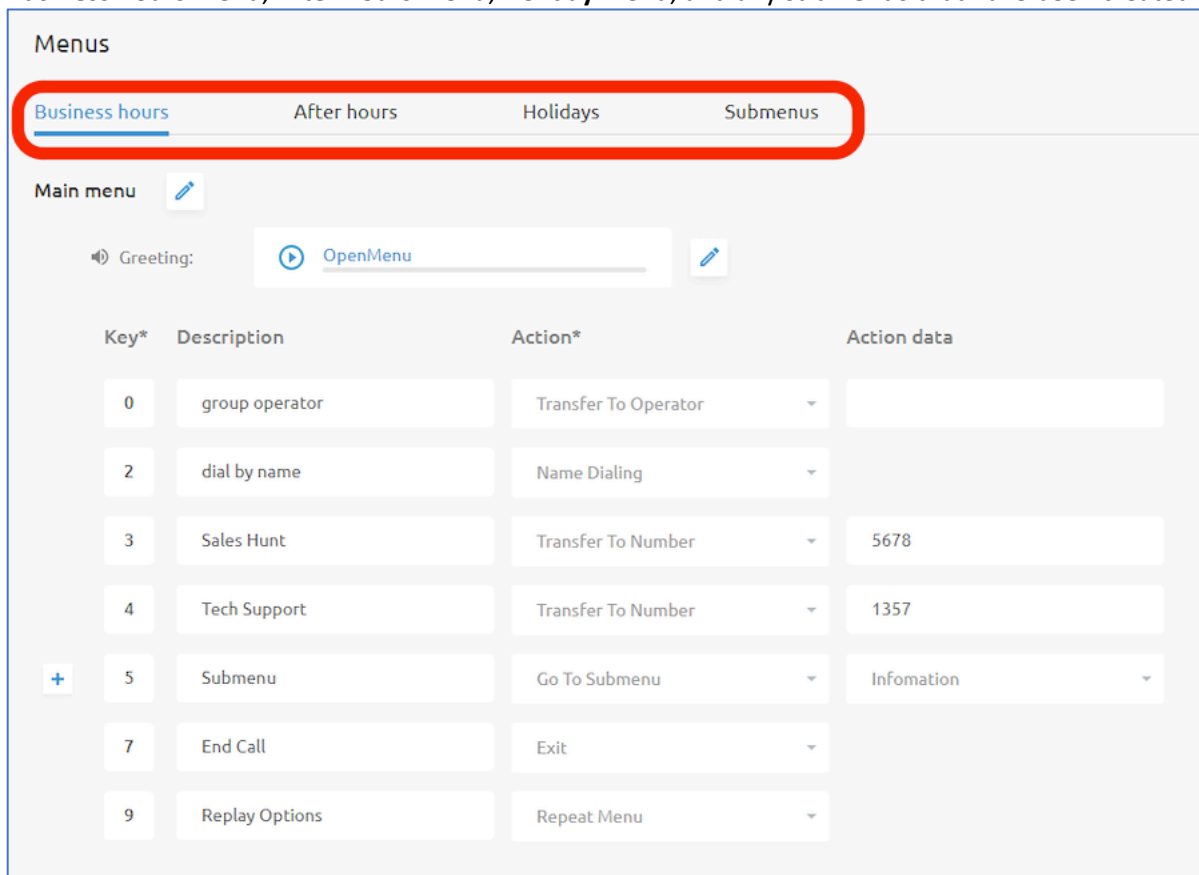


From the Auto Attendant page, there are three ways to access the menu configurations.

1. Use the **Menus** option in the left navigation pane.
2. Click on **Menu** under the Business hours box.
3. Click on **Menu** under the Holidays box.



All three of these options will ultimately get you to the same place. On this menu page you will have the ability to switch between available menus at the top of the screen, allowing you to manage your **Business hours** menu, **After hours** menu, **Holiday** menu, and any **submenus** that have been created.





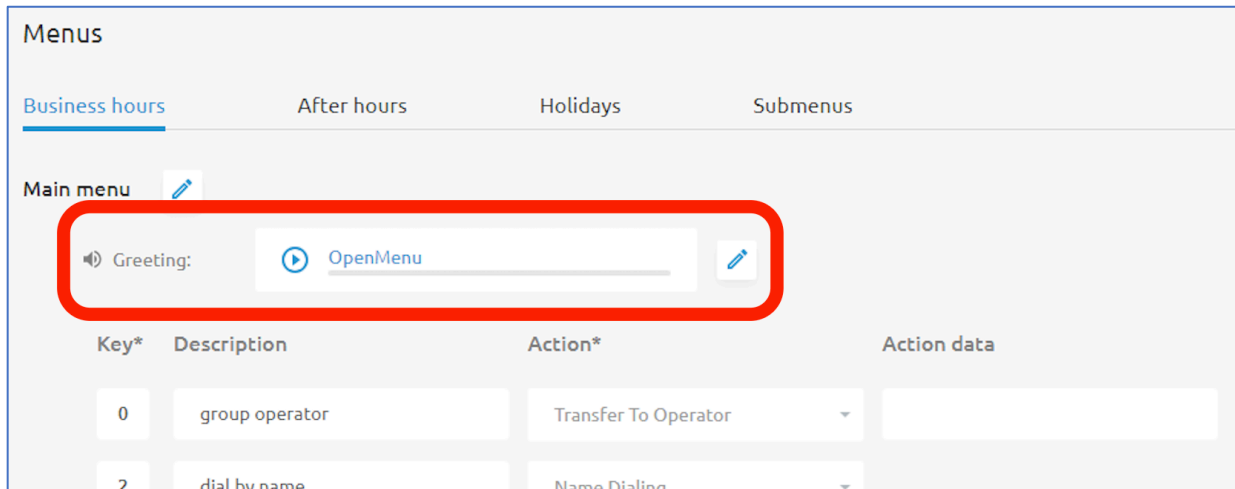
Change the Greeting

Each menu and submenu can have a different audio file or greeting that plays to callers once they have reached that menu. The greeting typically provides the callers with information about who they have reached, and then lists the available options for the caller on what to press. After hours messages may include information about your regular business hours for callers that need to speak to someone in person.

For example, “Thank you for calling ABC Company. If you know you party’s extension, please dial it any time. For our dial by name directory please press 1, for sales please press 2, for support press 3, to replay these options press 9”.

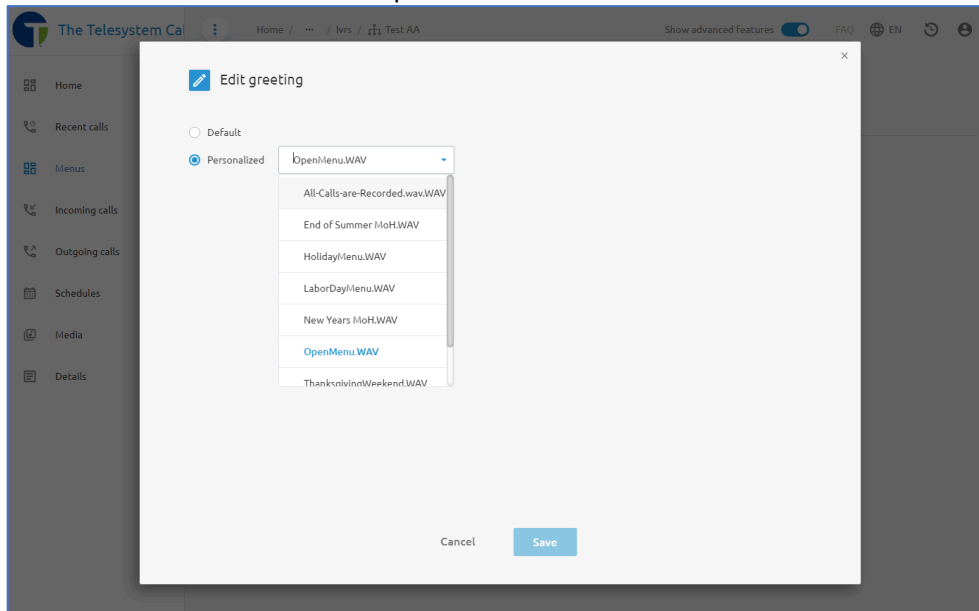
Review the section of this user guide titled “Accessing Media Files” for more information on how to upload or record new greetings for your auto attendant.

The greeting assigned to the menu can be found just below the title of the menu. If you are not familiar with what the current greeting sounds like, you can play the file from the portal by clicking on the play icon  next to the name of the audio file. To apply a new greeting/audio file to your menu, click on the pencil icon  to the right of the **Greeting**.



Key*	Description	Action*	Action data
0	group operator	Transfer To Operator	
2	dial by name	Name Dialing	


When you edit the greeting, you have the option to play a Default greeting (not recommended) or a Personalized greeting (recommended). When you select **Personalized**, a drop-down box will allow you to select an audio file stored in the portal.

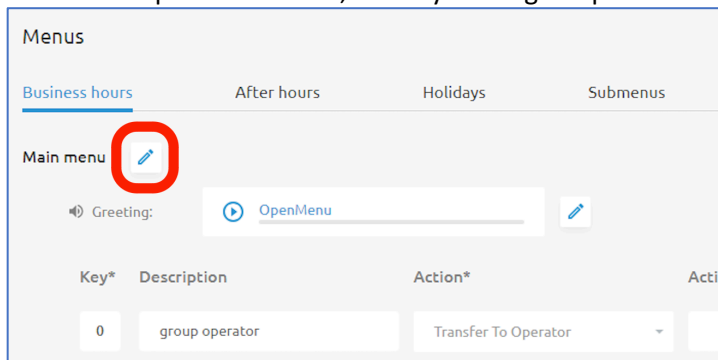


Select the file and then click the **Save** button at the bottom of the pop-up window to make your change. If you wish to review these audio files before selecting them, you must do so from the **Media** menu. Once you save your change the new file will begin playing to callers immediately if that menu is the current active menu based on your schedule.


Editing Menu Actions

The menu actions are where administrators can determine what keypad options are available to callers and what happens when callers press those keypad options. The options available should match what is presented to callers in the greeting you have recorded and activated for the associated menu.

To edit the options available, start by clicking the pencil icon  to the right of the menu name.



NOTE: There are two pencil icons on the page. The top one allows you to edit the menu options, the second one is specifically for editing the greeting.

Once you are in editor mode, you can modify existing key options or add new ones by click on the blue plus sign . Menu keys 0 through 9, *, # are all available for assignment.

When adding a new menu key option, enter the associated key in the first field, enter a description for you to easily identify what that assignment is for in the second column, select an action from the drop-down box, and then enter action data if necessary.

For example, if we wanted to assign key 5 to go the voicemail box of our sales team for an after hours menu, we would enter the following:

Key*	Description	Action*	Action data
0	group operator	Transfer To Operator	
1	dial by extension	Extension Dialing	
2	dial by name	Name Dialing	
5	Sales Voicemail	Transfer To Number	*903887

NOTE: *90 is the feature access code for Direct Voicemail Transfer for the associated phone number/extension, in this case the extension is 3887 so it is entered as “*903887”.

Available Actions for the Auto Attendant menu include:

- **Go To Submenu** – transfers the caller to a submenu for another set of options.
- **Transfer to Operator** – transfers the caller to an extension or phone number after playing the message “please stay on the line while your call is transferred to the operator”.
 - Please note that callers who do not press any key after the greeting has been played three times will be forwarded to the operator. If no operator is configured, the call will be terminated.
- **Transfer To Number With Prompt** – transfers the caller to an extension or phone number after playing the message “Your call is being transferred. Please hold.”. The phone number or extension you want to send callers should be populated in the **Action data** column.
- **Transfer To Number** –transfers the caller to an extension or phone number. The phone number or extension you want to send callers should be populated in the **Action data** column.
- **Repeat Menu** – repeats the menu announcement.
- **Exit** – hangs up on the caller after playing a system message “thank you for calling”.

These actions and configuration options are the same for the Business hours, After hours, Holidays, and Submenus.

Submenus

Submenus allow you to provide callers with additional options or layers within your Auto Attendant/IVR. Submenus follow all the same configuration rules and options as primary menus like the **Business hours** and **After hours** menus. You must record and assign a greeting and map out keys and actions for any submenu created.

Creating a New Submenu

To create a new submenu, you will need to select the action “Go To Submenu” from the primary menu option (Business hours, After hours, or Holidays), then select “Add new submenu” in the Action data drop-down.

The screenshot shows the 'Menus' configuration page for 'Test AA'. The 'After hours' menu is selected. The 'Main menu' section contains a table with the following data:

Key*	Description	Action*	Action data
0	group operator	Transfer To Operator	
1	dial by extension	Extension Dialing	
2	dial by name	Name Dialing	
5	Sales Voicemail	Transfer To Number	*903887
6	More Options	Go To Submenu	Add new submenu

A red box highlights the 'Add new submenu' button in the 'Action data' field for key 6. Below the table, a note states: 'Menu keys 0 - 9, *, # are available for selection.'

A pop-up window will display. Enter a name for your submenu, then click **Save**.

The screenshot shows a pop-up window titled 'Add submenu'. The window contains a text input field for 'Name*' with the value 'Information'. The 'Save' button is highlighted in blue.

Once you have saved the option, you will be returned to the primary menu that you were editing. The name of the submenu will appear in the **Action data** field for the key option row of the submenu you were configuring. Complete your changes for this menu and then click **Save** at the upper, right corner of the page.

The screenshot shows the 'Menus' configuration interface. At the top, there are tabs for 'Business hours', 'After hours', 'Holidays', and 'Submenus'. The 'Main menu' section includes a 'Greeting' field set to 'Default' and a 'Save' button. Below this is a table with columns for 'Key*', 'Description', 'Action*', and 'Action data'. The table contains five rows of menu items, with the last row, '6 More Options', highlighted by a red box. The 'Action data' for this row is 'Information'. A red box also highlights the 'Save' button in the top right corner.


Key*	Description	Action*	Action data
0	group operator	Transfer To Operator	
1	dial by extension	Extension Dialing	
2	dial by name	Name Dialing	
5	Sales Voicemail	Transfer To Number	*903887
6	More Options	Go To Submenu	Information

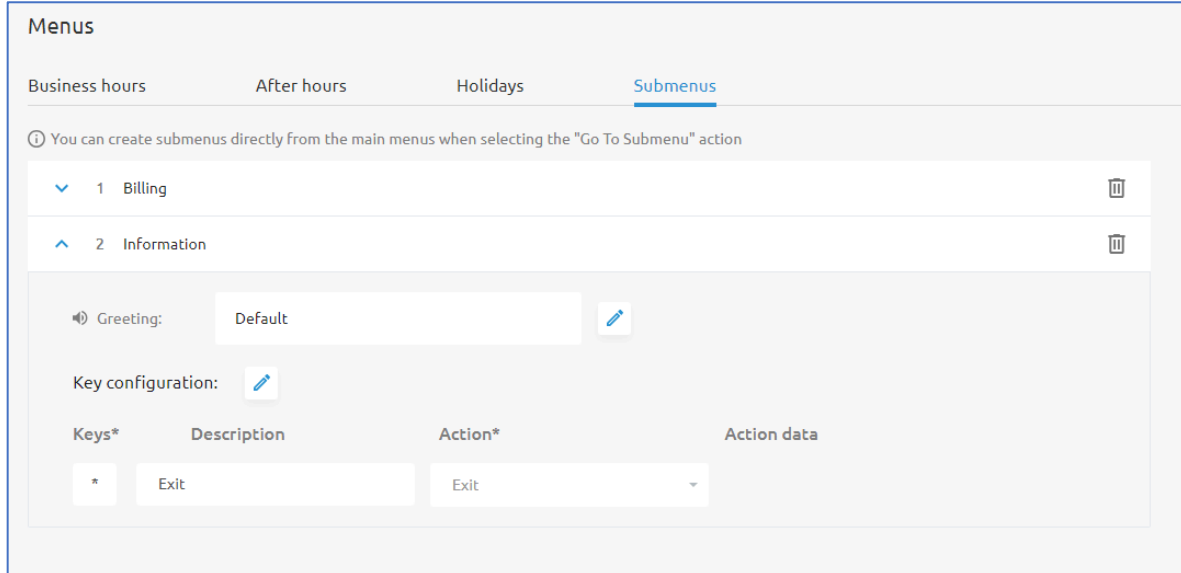
Managing Submenus

Once a submenu has been created, you must assign a greeting and key options and actions to the submenu. Submenus that have already been built can follow these same steps to modify the options of the submenu.

First, go to the Submenus section of the Call Flows>IVR for the Auto Attendant you wish to modify.

The screenshot shows the 'The Telesystem Call Center' interface. The breadcrumb trail is 'Home / IVR / Test AA'. The 'Menus' section is active, and the 'Submenus' tab is highlighted with a red box. Below the tabs, there is a message: 'You can create submenus directly from the main menus when selecting the "Go To Submenu" action'. A dropdown menu shows '1 Information' with a trash icon to its right.



If you have multiple submenus already built, locate the one you wish to modify and then click the blue down arrow  or any place in that row to expand the menu configuration.





Menus

Business hours After hours Holidays Submenus

① You can create submenus directly from the main menu when selecting the "Go To Submenu" action


1	Billing	
2	Information	

🔊 Greeting: 

Key configuration: 

Keys*	Description	Action*	Action data
*	Exit	Exit	

You can expand multiple submenus simultaneously if you need to copy a configuration for an existing submenu, but you will likely need to scroll up and down in your browser window to see all the data.

When editing submenus, like with the primary menu options (**Business hours, After hours, Holidays**) you will have two pencil icons  but they are in the reverse order from the primary menu options. The top pencil icon will allow you to change the greeting or audio/media file that is played to callers. The second pencil icon allows you to adjust the key configuration and action items for the menu.

As a reminder, the Greeting should only play options that are associated with the assigned menu or submenu.

When configuring a submenu, an additional **Action** is available titled **Back To Parent Menu**. This option, when selected by the caller, will return them to the previous menu they used to access this submenu. When a caller returns to a parent menu, the greeting assigned to that menu will automatically begin playing.

With each submenu created, it is best practice to assign this **Back To Parent Menu** as one of the options in your submenu to allow callers to easily return to hear the previous options, otherwise they will be forced to disconnect the call, and call back in to hear those options again which could cause your callers to be annoyed or irate.

NOTE: You can add layers of complexity to your auto attendant/IVR by having submenus that link to other submenus, or nesting submenus. When this is applied it can become difficult for you to manage as an administrator and difficult for callers to navigate through your phone system and reach the appropriate party.

The image below is an example of a submenu configuration that plays a message to the caller, and provides transfer options on selections 1 and 2, plays an audio announcement on option 3, and allows callers to return to the previous menu when pressing 7.

Menus

Business hours After hours Holidays Submenus

① You can create submenus directly from the main menu when selecting the "Go To Submenu" action

1 Billing 🗑️

🔊 Greeting: ▶ BillingMenu ✎

Key configuration: ✎

Keys*	Description	Action*	Action data
*	Exit	Exit	
1	Accounts Payable	Transfer To Number	9182
2	Accounts Receivable	Transfer To Number	9418
3	Contact Information	Play Announcement	BillingContactInformation
7	Return to Main Menu	Back To Parent Menu	

2 Information 🗑️