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## **Guide to Creating An Auto-Attendant**

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# 1 About This Document


## 1.1 Intended Audience


This document is intended for installers and administrators of a Cheetah PBX. It is a user's guide document designed to provide you with information on using the Telegato Cheetah Attendant Console.

## 1.2 Conventions Used In This Document

This manual uses several conventions to help you learn to use the program quickly and easily.

Menus and dialog options that have an underlined letter in their name represent the shortcut key assigned to the menu or option. Pressing the shortcut keys assigned to the menu or option is equivalent to clicking the menu or option. For example, the following figure shows a sample menu that uses shortcut keys. Procedures in this manual reflect shortcut keys if they are available.

The Caution and Warning symbol, , indicates information or a step that could be potentially dangerous, such as a step that could permanently affect the database or a user's access to the program.

The light bulb, , indicates a tip or information that will help you in using this document.

## 1.3 Disclaimer

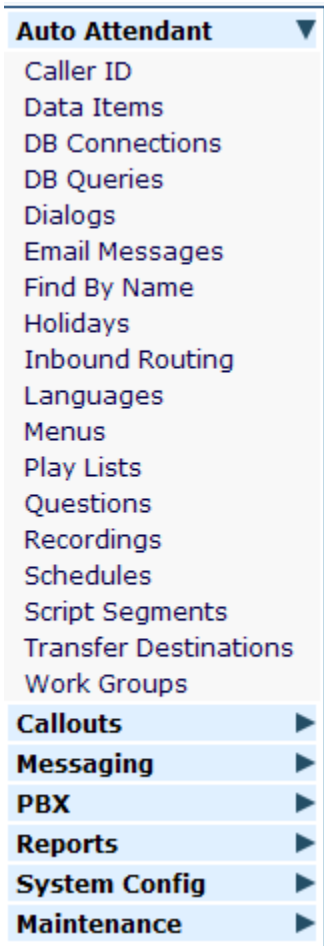
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## 1.4 Logging In

To log in to the System Management Console refer to the Logging In Guide.

## 2 Configuring the Auto Attendant

To begin configuring the Auto Attendant, log into the System Management Console and click on the Auto Attendant tab featured in the left hand menu, this will reveal the Auto Attendant sub menu. The following is an image of the expanded Auto Attendant menu:

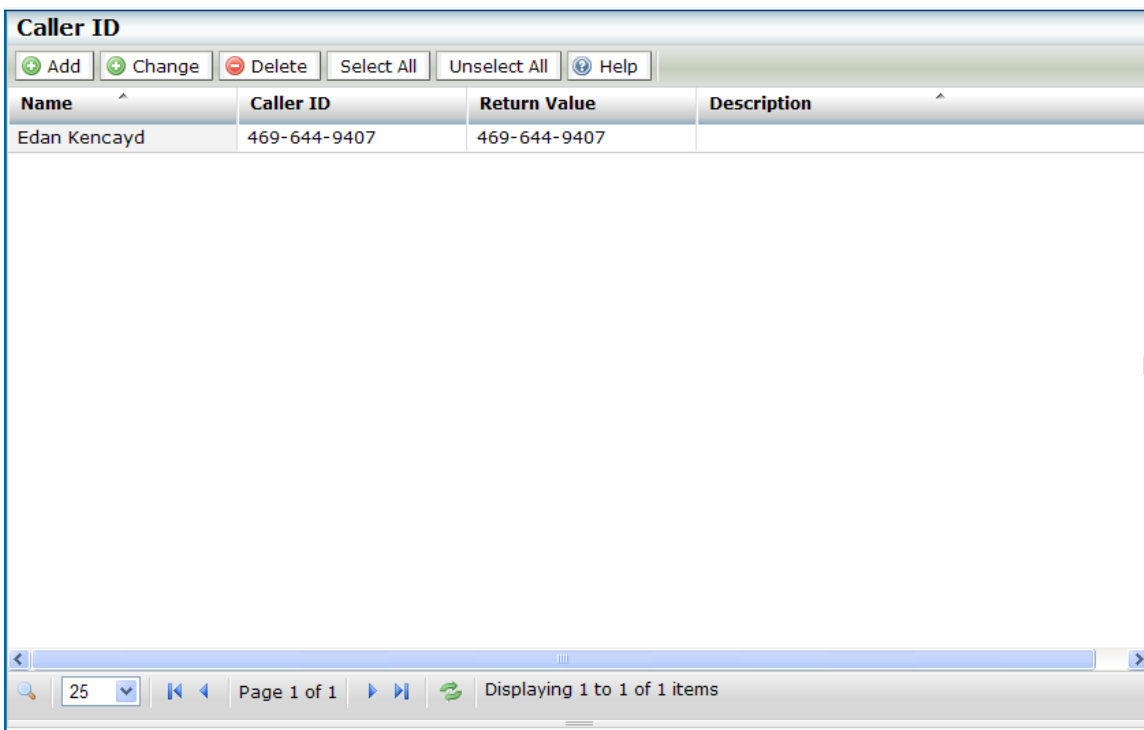


### 2.1 Caller ID

It is sometimes desirable to perform an operation based on the caller's number. The Caller ID section allows you to specify actions for any number of caller numbers. While it is named Caller ID, it can be used for any general look where a value should be returned based on some text string.

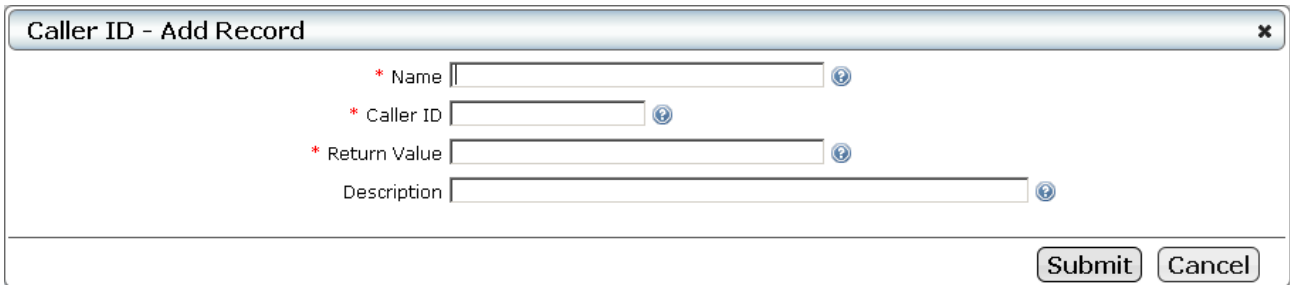
#### 2.1.1 Managing Caller IDs

To add, change, or delete Caller ID settings, click on the Caller ID item in the Auto Attendant submenu. The following image shows a sample grid for Caller ID:



### 2.1.2 Adding a Caller

To add a caller ID, click on the Add button. The following is a sample image of the Caller ID dialogue box:



The following is an explanation of fields in this dialogue:

Field	Description
Name	The named of this entry.
Caller ID	The 10 digit callers ID.
Return Value	The value this entry should be translated into.
Description	A description of this entry.

After all values have been entered click the Submit button.

### 2.1.3 Changing a Caller

To change an existing caller ID first select a row to change then click the Change button. The following is a sample image of the Caller ID dialogue box:

**Caller ID - Edit Record**

\* Name

\* Caller ID

\* Return Value

Description

### 2.1.4 Deleting a Caller

To delete a caller first select the row(s) to delete then click the Delete button.

## 2.2 Data Items

To manage data items, click on the Data Items item in the Auto Attendant submenu. The following image shows a sample grid for Data Items:

**Script Data Items**

Database Name	Table Name	Field Name	Description
Customer Service	Customer Service Rep	Length	Customer Service Data

25 Page 1 of 1 Displaying 1 to 1 of 1 items

### 2.2.1 Adding Data Items

To add data items, click on the Add button. The following is a sample image of the Data Items dialogue box:

The following is an explanation of fields in this dialogue:

Field	Description
Database Name	Database name to fetch data from
Table Name	Table name to fetch data from
Field Name	Field name to fetch data from
Description	Description of this entry

After all values have been entered click the Submit button.

### 2.2.2 Changing Data Items

To change an existing data item first select a row to change then click the Change button. The following is a sample image of the Data Items dialogue box:

You will only be able to change the values for the row you selected. After changing desired data click the Submit button.

### 2.2.3 Deleting Data Items

To delete an account code first select the row(s) to delete then click the Delete button.

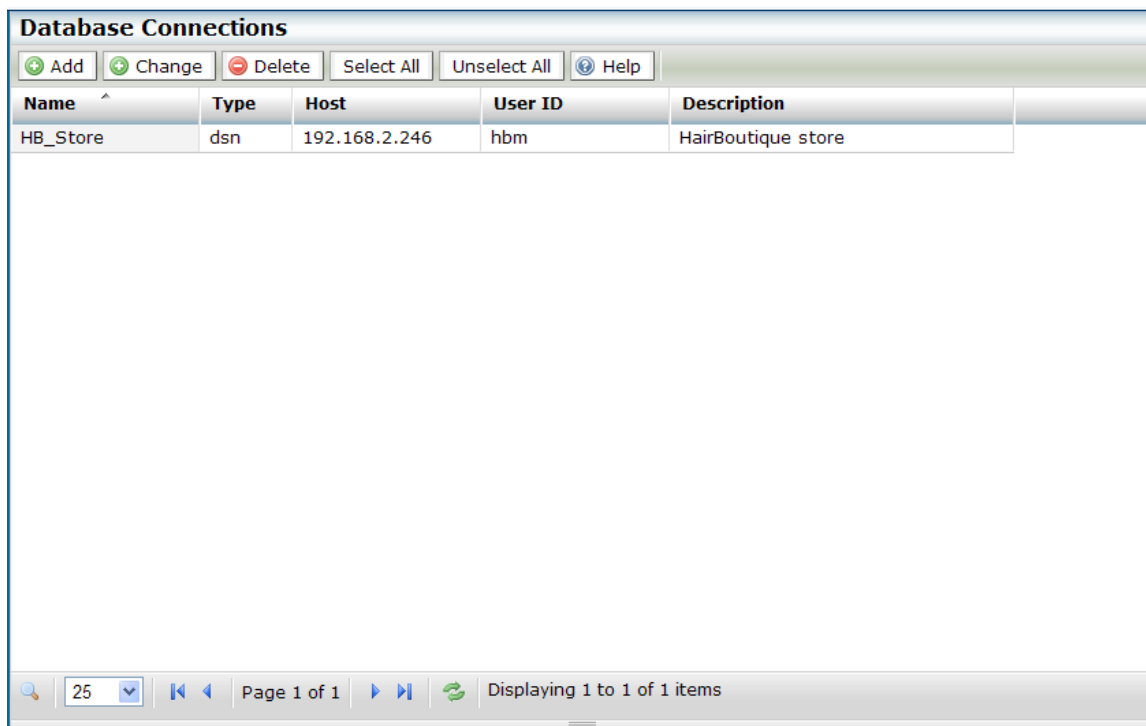
## 2.3 Database Connections and Queries

A Database Query (DB Query) is a request made to an external server's database to retrieve, update, or insert some information. DB Queries are made over a DB Connection.

To use DB Connections, you must install the SQL Proxy server on a Windows based PC capable of defining an ODBC connection to the desired database.

### 2.3.1 Managing DB Connections

To add, change, or delete database connections, click on the DB Connections item in the Auto Attendant submenu. The following image shows a sample grid for DB Connections:



The screenshot shows a window titled "Database Connections" with a toolbar containing "Add", "Change", "Delete", "Select All", "Unselect All", and "Help" buttons. Below the toolbar is a table with the following data:

Name	Type	Host	User ID	Description
HB_Store	dsn	192.168.2.246	hbm	HairBoutique store

At the bottom of the window, there is a search bar with the number "25" and a dropdown arrow, navigation buttons, and the text "Page 1 of 1" and "Displaying 1 to 1 of 1 items".

#### 2.3.1.1 Adding DB Connections

To add a database connection, click on the Add button. The following is a sample image of the DB Connections dialogue box:

## Guide To Creating An Auto-Attendant

The screenshot shows a dialog box titled "Database Connections - Add Record". It has a close button (X) in the top right corner. The fields are: "Connection Name" (required, indicated by a red asterisk), "Connection Type" (a dropdown menu set to "DSN"), "Host Name", "User ID", "Password", and "Description". Each field has a help icon (question mark in a circle) to its right. At the bottom right, there are "Submit" and "Cancel" buttons.

The following is an explanation of fields in this dialogue:

Field	Description
Connection Name	Name for this entry
Connection Type	Either DSN (for an external database) or Local DB if there is a database on the local system you wish to connect to. Unless you have the expertise to manage the local database using Linux, this is strongly discouraged
Host Name	IP address or network name of the PC running the SQL Proxy server
User ID	User ID used to make the connection
Password	Password used to make the connection
Description	Description of this entry

After all values have been selected click the Submit button.

### 2.3.1.2 Changing DB Connections

To change a database connection first select a row to change then click the Change button. The following is a sample image of the DB Connections dialogue box:

The screenshot shows a dialog box titled "Database Connections - Edit Record". It has a close button (X) in the top right corner. The fields are: "Connection Name" (with the value "HB\_Store"), "Connection Type" (a dropdown menu set to "DSN"), "Host Name" (with the value "192.168.2.246"), "User ID" (with the value "hbm"), "Password" (masked with dots), and "Description" (with the value "HairBoutique store"). Each field has a help icon (question mark in a circle) to its right. At the bottom right, there are "Submit" and "Cancel" buttons.

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.3.1.3 Deleting DB Connections

To delete a bridged appearance first select the row(s) to delete then click the Delete button.

### 2.3.2 Managing DB Queries

To add, change, or delete database queries, click on the DB Queries item in the Auto Attendant submenu. The following image shows a sample grid for DB Queries:

The screenshot shows a window titled "Queries" with a toolbar containing "Add", "Change", "Delete", "Select All", "Unselect All", and "Help" buttons. Below the toolbar is a table with the following data:

Name	Connection Name	Query String	Assignments	Description
GetInvoice	HB_Store	SELECT status, crea	INVSTATUS=status	Find an invoice in the store

At the bottom of the window, there is a status bar showing "Page 1 of 1" and "Displaying 1 to 1 of 1 items".

#### 2.3.2.1 Adding DB Queries

To add a database query, click on the Add button. The following is a sample image of the DB Queries dialogue box:

## Guide To Creating An Auto-Attendant

**Queries - Add Record**
✕

Name

Connection Name

Query String

Assignments

Track Failures

User Track Name

Description

The following is an explanation of fields in this dialogue:

Field	Description
Name	Name for this entry
Connection Name	Name of a previously defined DB Connection
Query String	SQL statement you want to execute. This can contain script variables from questions. These variables must be preceded by a dollar sign (\$).
Assignments	List of comma separated pairs where each pair is <var>=<field>. <var> is the name (without the dollar sign) of a script variable where you want the data to reside. <field> is the name of a database field returned by your Query String.
Track Failures	Check this box if you want a User Tracks entry made for this Question
User Track Name	If Track Failures is checked, then this is the name of the User Tracks entry that will be made
Description	Description of this entry

After all values have been entered click the Submit button.

### 2.3.2.2 Changing DB Queries

To change an existing database query first select a row to change then click the Change button. The following is a sample image of the DB Queries dialogue box:

The screenshot shows a dialog box titled "Queries - Edit Record". It contains the following fields and values:

- Name: GetInvoice
- Connection Name: HB\_Store
- Query String: SELECT status, create name
- Assignments: INVSTATUS=status
- Track Failures:
- User Track Name: test
- Description: Find an invoice in the store

At the bottom right, there are "Submit" and "Cancel" buttons.

You will only be able to change the values for the row you selected. After changing desired data click the Submit button.

### 2.3.2.3 Deleting DB Queries

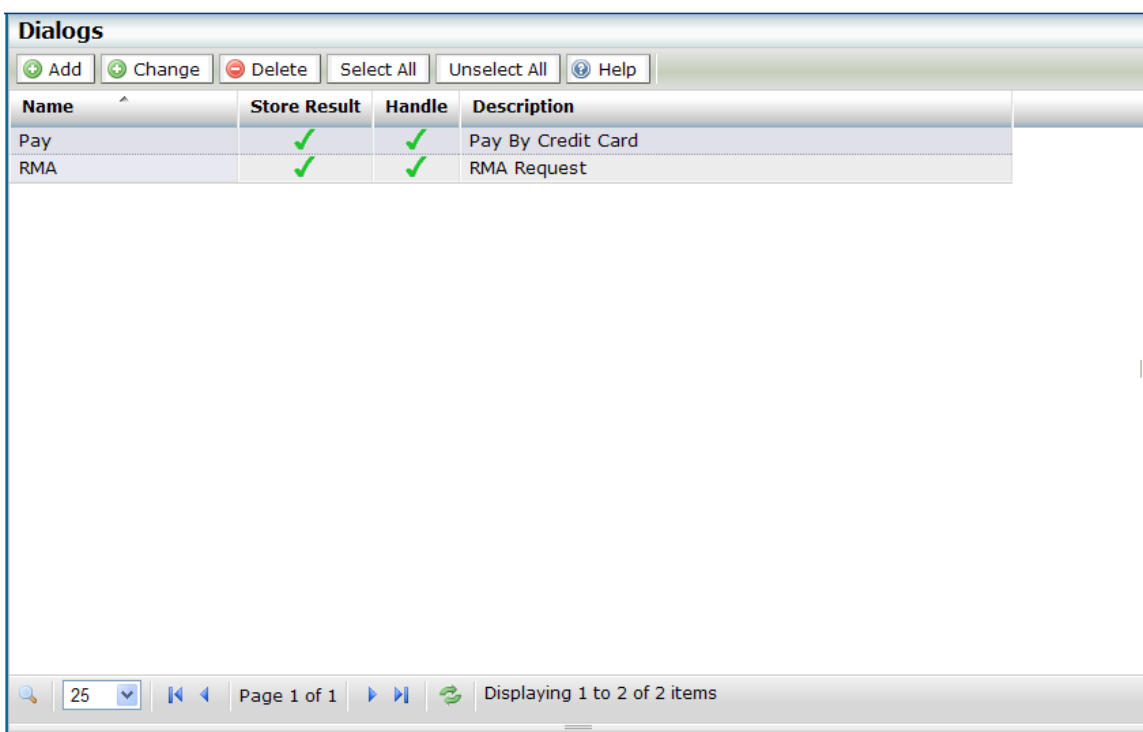
To delete a database query first select the row(s) to delete then click the Delete button.

## 2.4 Dialogs

A Dialog is a collection of the previously described Auto Attendant elements.

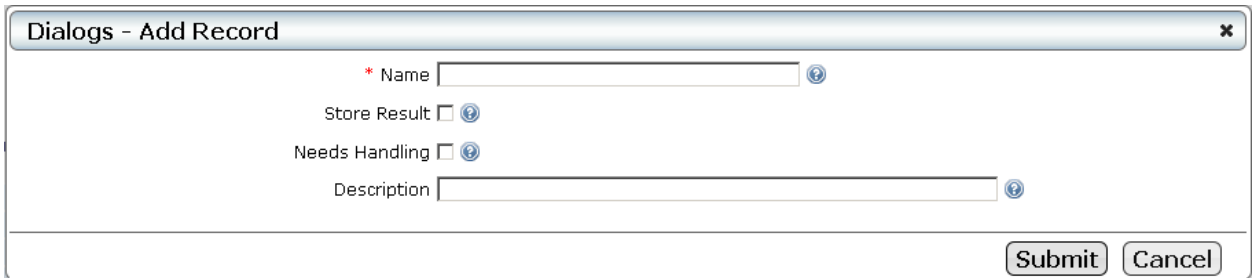
### 2.4.1 Manage Dialogs

To add, change, or delete the dialogs click on the Dialogs item in the Auto Attendant submenu. The following image shows a sample grid for Dialogs:



### 2.4.2 Adding Dialogs

To add a dialog, click on the Add button. The following is a sample image of the Dialogs dialogue box:



The following is an explanation of fields in this dialogue:

Field	Description
Name	Name for this entry
Store Result	If checked, all Dialog Items results will be stored in User Tracks
Needs Hand-ling	Check this box if you want this Dialog to show up on a report as something that needs a person to handle. As an example, a request for return authorization (RMA) Dialog would collect all information but a human being would need to complete the process. See Reports → Unhandled Requests
Description	Description of this entry

After all values have been entered and selected click the Submit button.

### 2.4.3 Changing Dialogs

To change an existing dialog first select a row to change then click the Change button. The following is a sample image of the Dialogs dialogue box:

The screenshot shows a web-based dialog editor. At the top, the title bar reads "Dialogs - Edit Record". Below it, there are several input fields and checkboxes: "Name" with the value "Pay", "Store Result" checked, "Needs Handling" checked, and "Description" with the value "Pay By Credit Card". A section titled "Dialog Items" contains a toolbar with buttons for "Add", "Change", "Delete", "Move Up", "Move Down", "Select All", and "Unselect All". Below the toolbar is a table with the following columns: "Name", "Order", "Enabled", "Type", "Item Name", and "Description". The table is currently empty. At the bottom of the window, there are "Submit" and "Cancel" buttons. A status bar at the bottom left shows "15" and "Page 1 of 1".

You will only be able to change the values for the row you selected. After changing desired data click the Submit button.

### 2.4.4 Deleting Dialogs

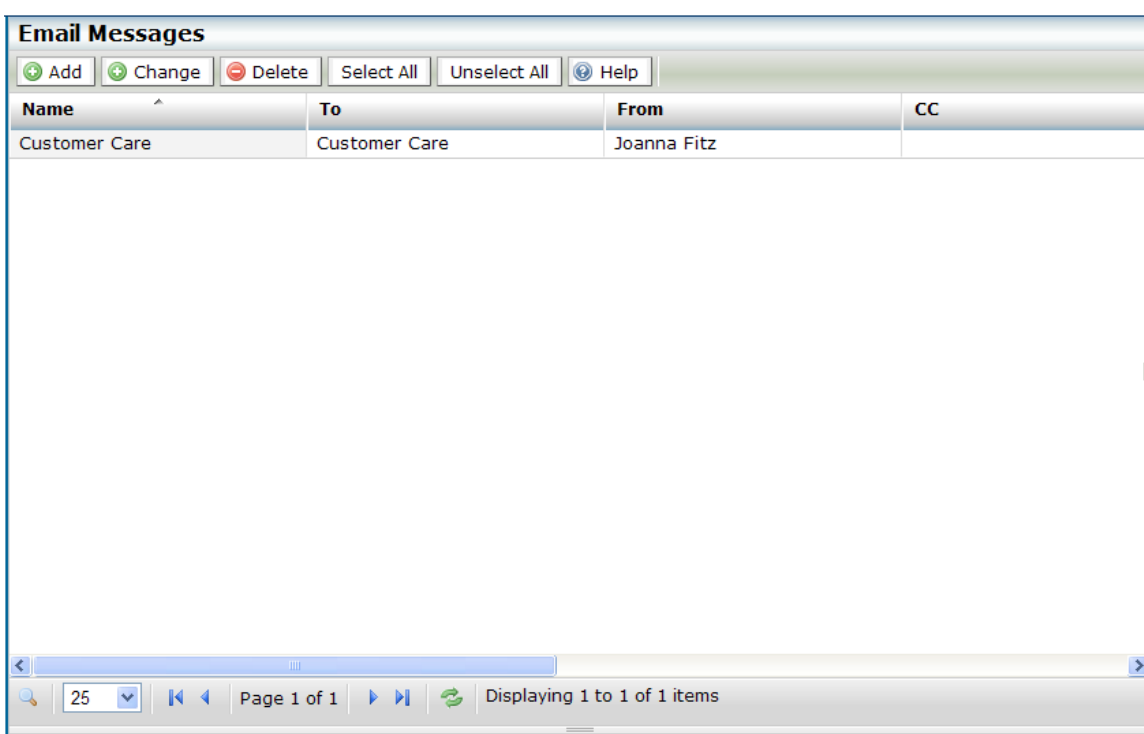
To delete a dialog first select the row(s) to delete then click the Delete button.

## 2.5 Email Messages

An Email Message is a definition of an email message sent to one or more email addresses.

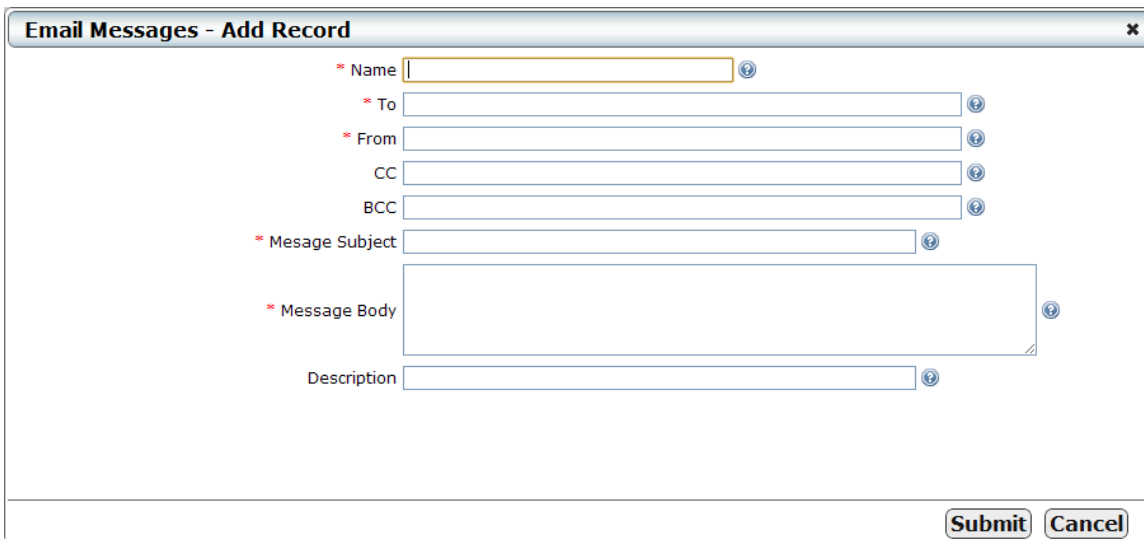
### 2.5.1 Managing Email Messages

To add, change or delete email messages click on the Email Messages item in the Auto Attendant submenu. The following image shows a sample grid for Email Messages:



### 2.5.2 Adding Email Messages

To add an email message, click on the Add button. The following is a sample image of the Email Messages dialogue box:



The following is an explanation of fields in this dialogue:

Field	Description
Name	Name for this entry

Field	Description
To	One or more comma separated email address destinations
From	The name and/or email address to be shown on the FROM line
CC	One or more comma separated email addresses to be copied
BCC	One or more comma separated email address to be blind copied
Message Subject	Subject of this message
Message Body	Body of the message
Description	Description of this entry

After all values have been entered click the Submit button.

For email messages to be sent, you must have provisioned the system wide email setting in the System Config menu → Email Settings.

### 2.5.3 Changing Email Messages

To change an email message first select a row to change then click the Change button. The following is a sample image of the Email Messages dialogue box:

The screenshot shows a dialog box titled "Email Messages - Edit Record". It contains the following fields:

- \* Name: Customer Care
- \* To: Customer Care
- \* From: Joanna Fitz
- CC: (empty)
- BCC: (empty)
- \* Message Subject: Need assistance ordering product
- \* Message Body: Please call my cell phone, I am interested in ordering a dozen units.
- Description: (empty)

At the bottom right of the dialog are two buttons: "Submit" and "Cancel".

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.5.4 Deleting Email Messages

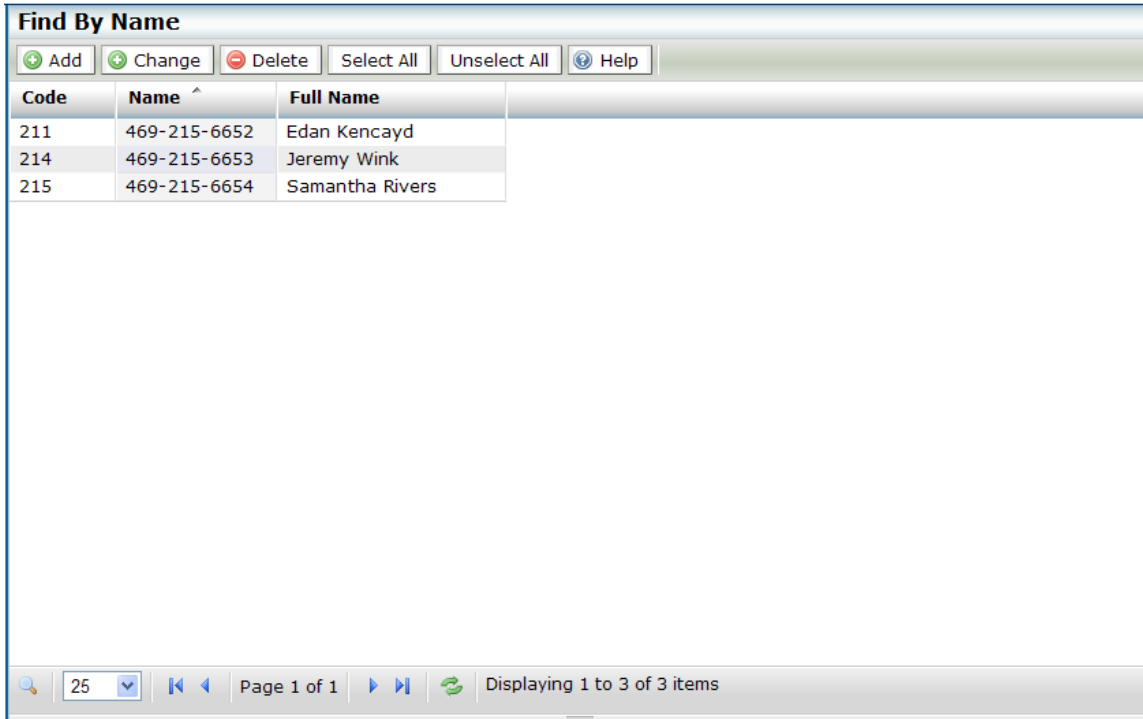
To delete an email message first select the row(s) to delete then click the Delete button.

## 2.6 Find By Name

Find by name settings allow your auto attendant to translate a number entered by a caller into a string of data.

### 2.6.1 Managing Find By Name Settings

To add, change, or delete find by name settings click on the Find By Name item in the Auto Attendant submenu. The following image shows a sample grid for Find By Name:



Code	Name ^	Full Name
211	469-215-6652	Edan Kencayd
214	469-215-6653	Jeremy Wink
215	469-215-6654	Samantha Rivers

### 2.6.2 Adding Find By Name Entry

To add a Find By Name entry, click on the Add button. The following is a sample image of the Find By Name dialogue box:



**Find By Name - Add Record**

Entered Code

Returned Data

Full Name

The following is an explanation of fields in this dialogue:

Field	Description
Entered Code	Code to be entered by caller
Returned Data	Dialed code for this entry
Full Name	Data to be returned for this entry

After all values have been entered click the Submit button.

### 2.6.3 Changing Find By Name Settings

To change find by name settings first select a row to change then click the Change button. The following is a sample image of the Find By Name dialogue box:

The image shows a dialog box titled "Find By Name - Edit Record". It has three input fields: "Entered Code" containing "211", "Returned Data" containing "469-215-6652", and "Full Name" containing "Edan Kencayd". At the bottom right, there are "Submit" and "Cancel" buttons.

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.6.4 Deleting Find By Name Settings

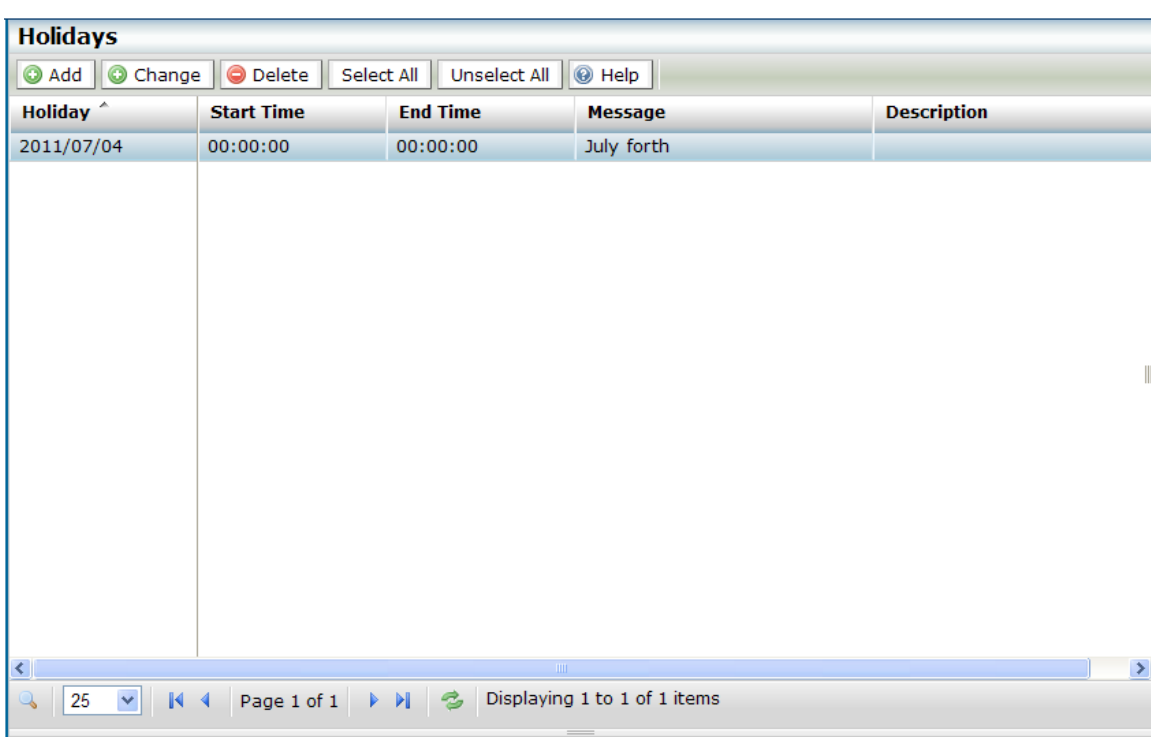
To delete a find by name setting first select the row(s) to delete then click the Delete button.

## 2.7 Holidays

A Holiday is a day or partial day when your business is not in normal working hours.

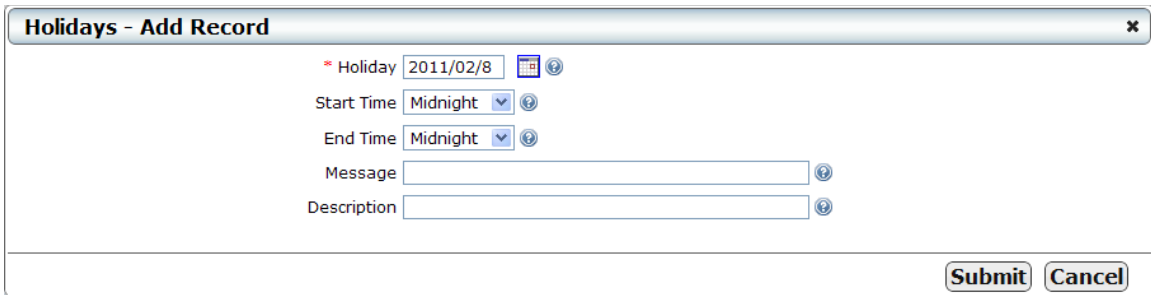
### 2.7.1 Managing Holidays

To add, change, or delete a holiday click on the Holidays item in the Auto Attendant submenu. The following image shows a sample grid for Holidays:



### 2.7.2 Adding Holidays

To add a holiday, click on the Add button. The following is a sample image of the Holidays dialogue box:



The following is an explanation of fields in this dialogue:

Field	Description
Holiday	Date of the holiday
Description	Description of this entry
Start Time	Start time of the Holiday. If the whole day is a holiday, leave this set to 00-00-00. If the Holiday is a partial day, then enter that start and end time of the Holiday. As an example, if the afternoon was a Holiday you might enter 1PM to 6PM.
End Time	End time of the Holiday. If the whole day is a holiday, leave this set to 00-00-

Field	Description
	00.
Message	Special message to be played to callers during this Holiday

After all values have been selected click the Submit button.

### 2.7.2.1 Selecting the Holiday Date

You can type the Holiday date in manually using the format YYYY-MM-DD (example: 2011-07-24) or press the calendar image as shown here and click on a date. Use the > and < to move forward or backward a month and the >> and << to move forward and backward a year:

### 2.7.3 Changing a Holiday

To change a holiday first select a row to change then click the Change button. The following is a sample image of the Holidays dialogue box:

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.7.4 Deleting a Holiday

To delete a holiday first select the row(s) to delete then click the Delete button.

## 2.8 Routing Inbound Calls

Inbound calls must be told where to go and how to be routed.

### 2.8.1 Managing Inbound Routing

To add, change, or delete inbound routing settings click on the Inbound Routing item in the Auto Attendant submenu. The following image shows a sample grid for Inbound Routing:

Inbound Routing				
Dialed Number	IP Address	Trunk Number	Route	Description
212	68.41.74.238	1,2,3,4	Ext100	Order Line

Buttons: Add, Change, Delete, Select All, Unselect All, Help

Page 1 of 1 | Displaying 1 to 1 of 1 items

### 2.8.2 Adding an Inbound Route

To add an inbound route, click on the Add button. The following is a sample image of the Inbound Routing dialogue box:

**Inbound Routing - Add Record**

Dialed Number

IP Address

Trunk Number

Route

Description

Buttons: Submit, Cancel

The following is an explanation of fields in this dialogue:

Field	Description
Dialed Number	Fill this in if you want routing based on a called number. Useful when you have multiple DID numbers that need to be handled differently
IP Address	Use this field when you are using SIP trunks to specify how each trunk should be handled
Trunk Number	Use this when you are using analog trunks from your phone service provider. Value in this field is a comma separated list of port number and start with 1 (not 0)
Route	Specifies the Route that should be used for all calls that arrive to the specified dialed number, from the specified IP address, or arrive on the specified analog trunks
Description	Description of this entry

After all values have been entered click the Submit button.

### 2.8.3 Changing an Inbound Route

To change an inbound route first select a row to change then click the Change button. The following is a sample image of the Inbound Routing dialogue box:

The screenshot shows a dialog box titled "Inbound Routing - Edit Record". It contains the following fields and values:

- Dialed Number: 212
- IP Address: 68.41.74.238
- Trunk Number: 1,2,3,4
- Route: Ext100
- Description: Order Line

At the bottom right of the dialog box, there are two buttons: "Submit" and "Cancel".

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.8.4 Deleting an Inbound Route

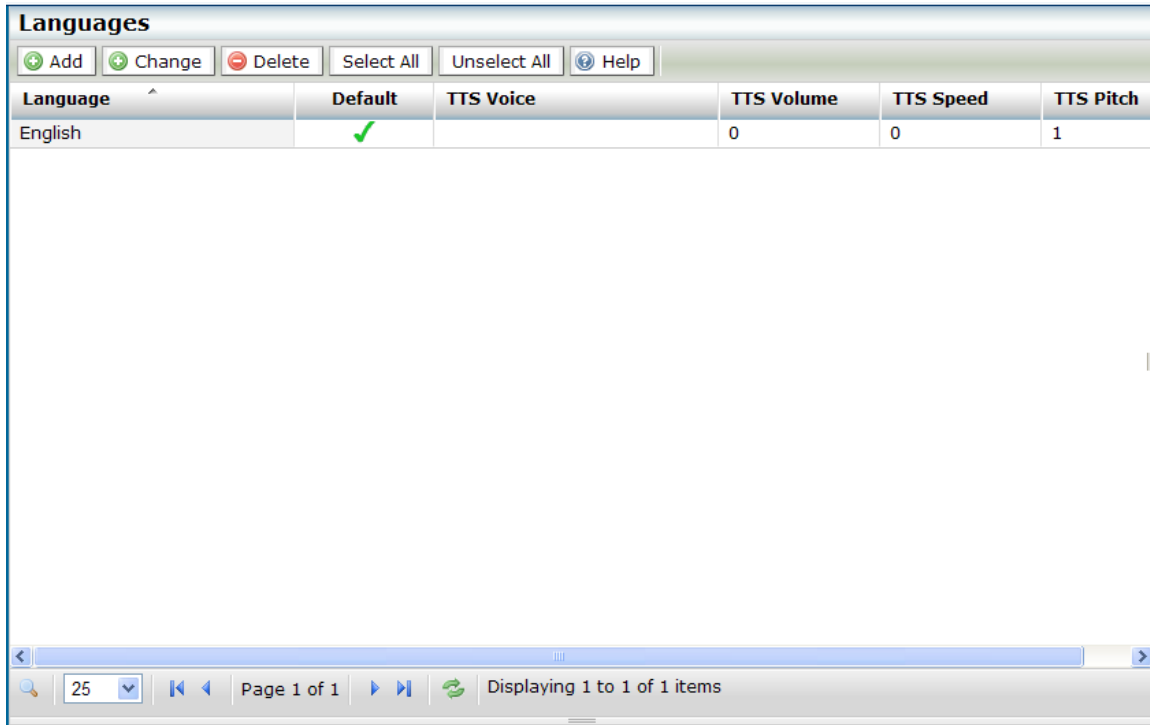
To delete an inbound route first select the row(s) to delete then click the Delete button.

## 2.9 Languages

The system comes with a default Language of English. Other Languages such as Spanish, French, etc. may be defined. To use prompts in other Languages, the Language itself must first be defined.

## 2.9.1 Managing Languages

To add, change, or delete languages click on the Languages item in the Auto Attendant submenu. The following image shows a sample grid for Languages:



## 2.9.2 Adding Languages

To add languages, click on the Add button. The following is a sample image of the Languages dialogue box:

The following is an explanation of fields in this dialogue:

Field	Description
Language	Name of the language

Field	Description
Default Language	Check this box if you want this entry to be the primary language spoken for all greetings and prompts
TTS Voice	Name of the TTS Voice that should be used for this language. Only applicable if you have purchased additional TTS licenses
TTS Volume	Volume this TTS should use. Only applicable if you have purchased additional TTS licenses
TTS Speed	Speed this TTS should use. Only applicable if you have purchased additional TTS licenses
TTS Pitch	Pitch this TTS should use. Only applicable if you have purchased additional TTS licenses

After all values have been entered click the Submit button.

### 2.9.3 Changing Languages

To change language settings first select a row to change then click the Change button. The following is a sample image of the Languages dialogue box:

The screenshot shows a dialog box titled "Languages - Edit Record". It contains the following fields and controls:

- Language:** A text field containing "English" with a help icon.
- Default Language:** A checkbox that is checked, with a help icon.
- TTS Voice:** A text field with a help icon.
- TTS Volume:** A numeric input field containing "0" with a help icon.
- TTS Speed:** A numeric input field containing "0" with a help icon.
- TTS Pitch:** A numeric input field containing "1" with a help icon.

At the bottom right of the dialog box, there are two buttons: "Submit" and "Cancel".

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.9.4 Deleting Languages

To delete a language setting first select the row(s) to delete then click the Delete button.

## 2.10 Menus

Most Auto Attendants use at least one menu to offer the caller options though menus selections can themselves utilize another menu.

### 2.10.1 Managing Menus

To add, change, or delete menus click on the Menu item in the Auto Attendant submenu. The following image shows a sample grid for Menus:

Menus					
<input type="button" value="Add"/> <input type="button" value="Change"/> <input type="button" value="Delete"/> <input type="button" value="Select All"/> <input type="button" value="Unselect All"/> <input type="button" value="Help"/>					
Name	SubMenu	Initial Greeting	Store Result	Destination	Description
main		aa_welcome			
main2					
test		Hello			

Page 1 of 1 | Displaying 1 to 3 of 3 items

### 2.10.2 Adding Menus

To add menu settings, click on the Add button. The following is a sample image of the Menu dialog box:

**Menus - Add Record**

Name

This is a SubMenu

Initial Greeting

Post Greeting

Say Zero Last

No Selection Action

No Selection Param

Max Retries

User Track Name

Track Failures

Store Result

Destination

Description

## Guide To Creating An Auto-Attendant

The following is an explanation of fields in this dialogue:

<b>Field</b>	<b>Description</b>
Name	Name you are giving to this menu
This is a submenu	Check this box if this menu is not a top level menu. i.e., It is only used from another menu
Initial Greeting	Name of greeting to be played before menu selection options
Post Greeting	Name of greeting to be played after menu selection options
Say Zero Last	Check this box if zero is a valid option and you want it said as your last option
No Selection Action	Action to take if the caller does not enter any selection. Actions can be: Exit, Play Audio, Return, Route, Run Script, Set Language
No Selection Param	Parameter to the No Selection Action. As an example if the action were to set to Route, this would be the specific Route you wanted to execute
Max Retries	Number of times menu will be played if the caller does not enter a valid selection or enters no selection at all
User Track Name	Name of a User Track to record the results of this menu selection
Track Failures	Check this if you want to record the results of this in a User Track
Store Result	If checked, all Menu selections will be stored in User Tracks
Destination	Currently not used
Description	Description of this menu

After all values have been entered and selected click the Submit button.

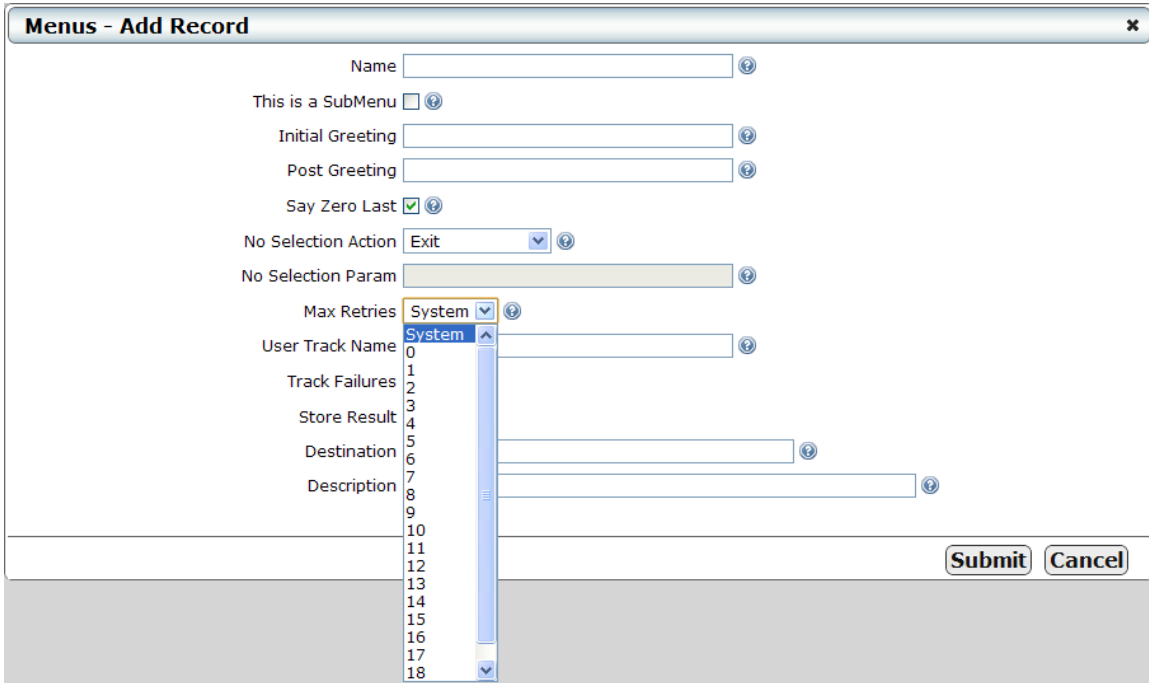
### 2.10.2.1 Selecting No Selection Action

**2.10.2.2** To select desired no selection action first click on the menu's down arrow which will display action options. Select desired action. The following is a sample image of the no selection action options:

The image shows a software dialog box titled "Menus - Add Record". It contains several input fields and checkboxes. The "No Selection Action" dropdown menu is open, showing a list of options: "Exit", "Menu", "Play Audio", "Return", "Route", "Run Script", and "Set Language". Other fields include "Name", "Initial Greeting", "Post Greeting", "Max Retries", "User Track Name", "Destination", and "Description". There are also checkboxes for "This is a SubMenu", "Say Zero Last", and "Track Failures". The "Submit" and "Cancel" buttons are located at the bottom right of the dialog.

### 2.10.2.3 Selecting Max Retries

**2.10.2.4** To select desired number of max retries first click on the menu's down arrow which will display number options. Select desired number of max retries. The following is a sample image of the retry options:



### 2.10.3 Changing Menus

To change a menu setting first select a row to change then click the Change button. The following is a sample image of the Menus dialogue box:

**Menus - Edit Record**

Name

This is a SubMenu

Initial Greeting

Post Greeting

Say Zero Last

No Selection Action

No Selection Param

Max Retries

User Track Name

Track Failures

Store Result

Destination

Description

**Menu Items**

Item	Valid	Prompt	Action	Parameter	Description
1					
2					
3					
4					
5					
6					
7					
8					
-					

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.10.4 Deleting Menus

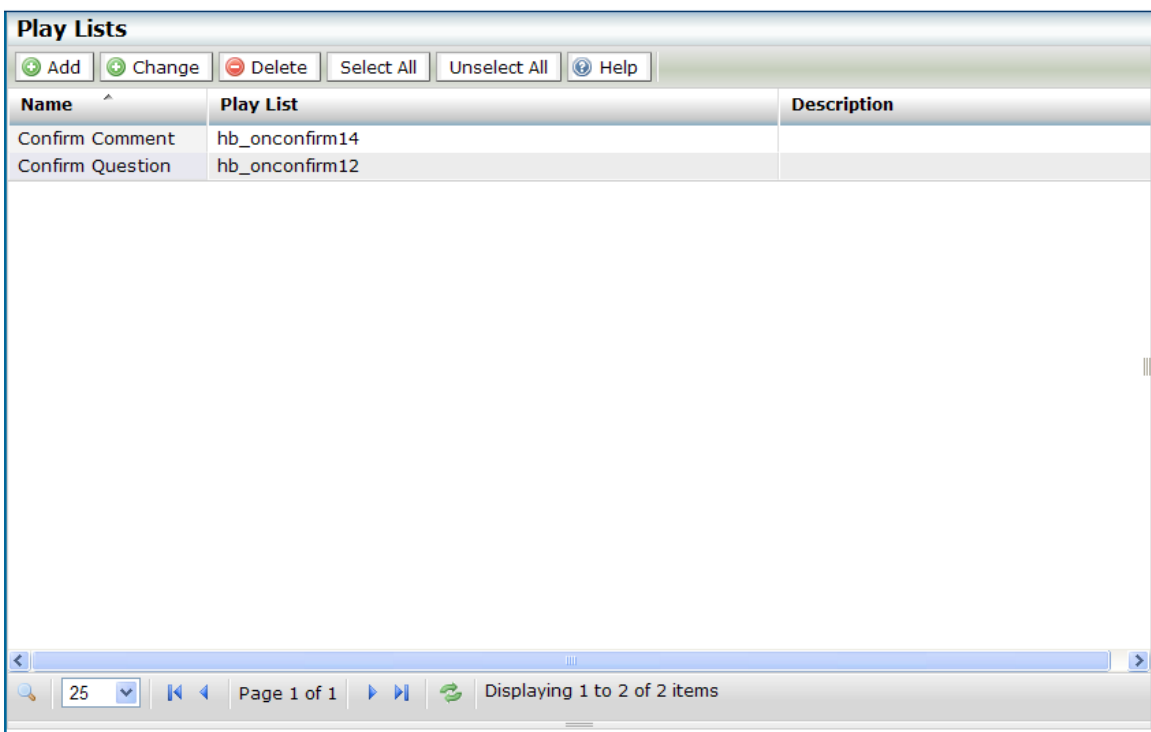
To delete a menu first select the row(s) to delete then click the Delete button.

## 2.11 Play Lists

A Play List is a list of one or more audio prompts.

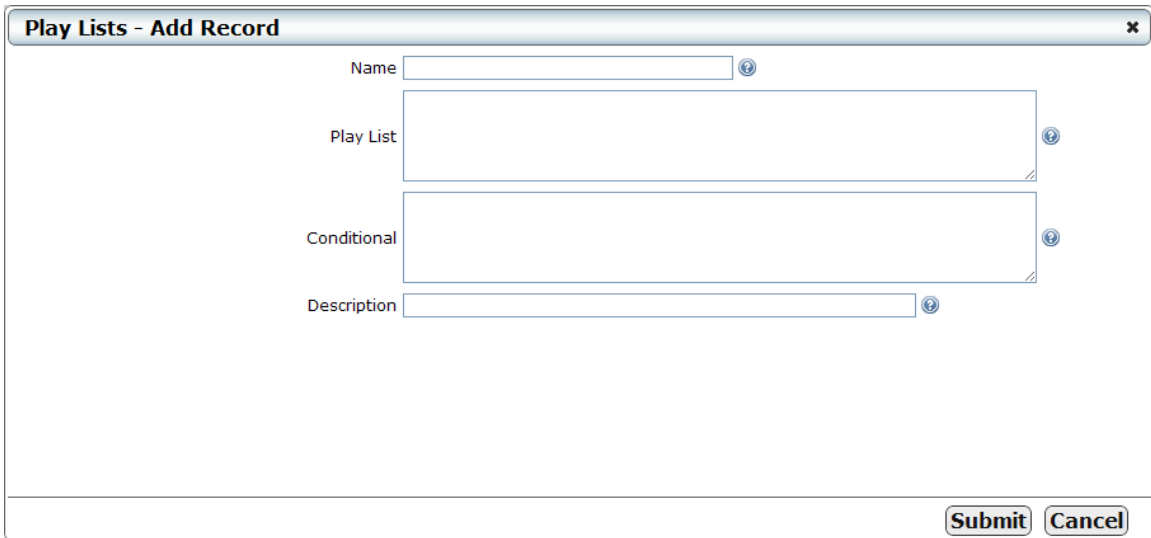
### 2.11.1 Managing Play Lists

To add, change, or delete play lists click on the Play Lists item in the Auto Attendant submenu. The following image shows a sample grid for Play Lists:



### 2.11.2 Adding Play Lists

To add play lists click on the Add button. The following is a sample image of the Play Lists dialogue box:



The following is an explanation of fields in this dialogue:

Field	Description
Name	Name for this entry

Field	Description
Play List	Comma separated list of audio file names (without the file extension)
Conditional	Script statement such as would go into an 'IF' that when evaluated determines if this Play List will be executed
Description	Description of this entry

After all values have been entered click the Submit button.

### 2.11.3 Changing Play Lists

To change play lists first select a row to change then click the Change button. The following is a sample image of the Play Lists dialogue box:

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.11.4 Deleting Play Lists

To delete a play list first select the row(s) to delete then click the Delete button.

## 2.12 Questions

A Question is the system asking the caller a question by playing one or more prompts and then collecting the answer.

### 2.12.1 Managing Questions

To add, change, or delete a question click on the Questions item in the Auto Attendant submenu. The following image shows a sample grid for Questions:

The screenshot shows a web interface titled "Questions". At the top, there are buttons for "Add", "Change", "Delete", "Select All", "Unselect All", and "Help". Below these is a table with the following columns: "Name", "Data Type", "Verify", "Destination", and "Description". One row is visible with the following data: "Get CVV", "Digits", a green checkmark in the "Verify" column, "PayCardCVV", and "Get Credit Card CVV". At the bottom of the interface, there is a search bar with the number "25", navigation arrows, "Page 1 of 1", and a refresh icon with the text "Displaying 1 to 1 of 1 items".

Name	Data Type	Verify	Destination	Description
Get CVV	Digits	✓	PayCardCVV	Get Credit Card CVV

### 2.12.2 Adding Questions

To add a question, click on the Add button. The following is a sample image of the Questions dialogue box:

## Guide To Creating An Auto-Attendant

**Questions - Add Record**
✕

Name

Input Data Type Credit Card

Minimum Digits 4

Maximum Digits 4

Allowed Digits 0123456789

Verify Input

Maximum Retries On Error 3

Prompt List

Track Failures

User Track Name

Grammar

Left Fill Length No Fill

Left Fill Character 0

Go Back Digit None

Terminator Digit #

Destination

Hide Data

Description

The following is an explanation of fields in this dialogue:

Field	Description
Name	Name for this entry
Input Data Type	Type of data being collected. If your type of data doesn't fall into any other category, choose the generic 'Digits'
Minimum Digits	Minimum number of digits to collect
Maximum Digits	Maximum number of digits to collect
Allowed Digits	Enter the digits that are allowed
Verify Input	If checked, caller will be played digits collected and asked to press another digit to confirm the correctness
Max Retries ON Error	Maximum number of times caller will be re-prompted if they do not enter any digits, insufficient digits, or a digit that is not valid
Prompt List	Comma separated list of Prompts to play
Track Failures	Check this box if you want a User Tracks entry made for this Question
User Track Name	If Track Failures is checked, name of the User Tracks entry that will be made
Grammar	If using speech recognition, name of the speech recognition grammar

Field	Description
Left Fill Length	Number of places to which the collected digits should be left filled
Left Fill Character	Character to be used to left fill the collected digits. As an example: If the user entered 123 and the left fill length was 6 and the left fill character was '0', then the result would be '000123'
Go Back Digit	If a digit is selected here and the caller presses this digit, Question will terminate. If this is part of a dialog, previous dialog component will be executed
Destination	Name of a script variable where the collected digits should be stored and can be used elsewhere
Hide Data	If this is checked, collected data is security sensitive and should be hidden in logging and reports
Description	Description of this entry

After all values have been entered and selected click the Submit button.

### 2.12.2.1 Selecting Input Data Type

**2.12.2.2** To select input data type first click on the menu's down arrow which will display type options. Select desired input data type. The following is a sample image of the data type options:

The screenshot shows a dialog box titled "Questions - Add Record" with a close button (X) in the top right corner. The dialog contains several fields and controls:

- Name:** A text input field with a help icon.
- Input Data Type:** A dropdown menu currently showing "Credit Card". The dropdown is open, displaying a list of options: "Credit Card", "Date as MMDD", "Date as MMY", "Date as MMDDYY", "Date as YYMMDD", "Digits", "Money as \$\*\$\$", "Number", "Time as HHMM", and "Time as HHMMSS".
- Minimum Digits:** A text input field.
- Maximum Digits:** A text input field.
- Allowed Digits:** A text input field.
- Verify Input:** A text input field.
- Maximum Retries On Error:** A text input field.
- Prompt List:** A text input field with a help icon.
- Track Failures:** A checkbox with a help icon.
- User Track Name:** A text input field with a help icon.
- Grammar:** A text input field with a help icon.
- Left Fill Length:** A dropdown menu set to "No Fill".
- Left Fill Character:** A dropdown menu set to "0".
- Go Back Digit:** A dropdown menu set to "None".
- Terminator Digit:** A dropdown menu set to "#".
- Destination:** A text input field with a help icon.
- Hide Data:** A checkbox with a help icon.
- Description:** A text input field with a help icon.

At the bottom right of the dialog, there are two buttons: "Submit" and "Cancel".

### 2.12.2.3 Selecting Minimum Digits

To select minimum number of digits first click on the menu's down arrow which will display quantity options. Select desired minimum number. The following is a sample image of the quantity options:

The screenshot shows a dialog box titled "Questions - Add Record". The "Input Data Type" is set to "Credit Card". The "Minimum Digits" dropdown menu is open, showing options 1 through 9. The "Allowed Digits" field contains the text "56789". Other fields include "Name", "Maximum Digits", "Verify Input", "Maximum Retries On Error", "Prompt List", "Track Failures", "User Track Name", "Grammar", "Left Fill Length", "Left Fill Character", "Go Back Digit", "Terminator Digit", "Destination", "Hide Data", and "Description". The "Submit" and "Cancel" buttons are at the bottom right.

### 2.12.2.4 Selecting Maximum Digits

To select maximum number of digits first click on the menu's down arrow which will display quantity options. Select desired maximum number. The following is a sample image of the quantity options:

The screenshot shows a web form titled "Questions - Add Record". The form contains several fields and dropdown menus. The "Maximum Retries On Error" field is currently selected, and its dropdown menu is open, displaying a list of numbers from 1 to 20. The number 4 is highlighted in blue. Other fields include "Name", "Input Data Type" (set to "Credit Card"), "Minimum Digits" (4), "Maximum Digits" (4), "Allowed Digits" (56789), "Verify Input" (4), "Prompt List", "Track Failures", "User Track Name", "Grammar", "Left Fill Length", "Left Fill Character", "Go Back Digit", "Terminator Digit" (set to "#"), "Destination", "Hide Data" (checkbox), and "Description". The form has "Submit" and "Cancel" buttons at the bottom right.

### 2.12.2.5 Selecting Maximum Retries on Error

To select maximum number of retries on error first click on the menu's down arrow which will display quantity options. Select desired number of maximum retries. The following is a sample image of the quantity options:

## Guide To Creating An Auto-Attendant

**Questions - Add Record**

Name

Input Data Type **Credit Card**

Minimum Digits **4**

Maximum Digits **4**

Allowed Digits **0123456789**

Verify Input

Maximum Retries On Error **3**

Prompt List

Track Failures **3**

User Track Name

Grammar

Left Fill Length **3**

Left Fill Character **0**

Go Back Digit **None**

Terminator Digit **#**

Destination

Hide Data

Description

**Submit** **Cancel**

### 2.12.2.6 Selecting Left Fill Length

To select left fill length first click on the menu's down arrow which will display quantity options. Select desired fill length. The following is a sample image of the quantity options:

## Guide To Creating An Auto-Attendant

Questions - Add Record

Name

Input Data Type

Minimum Digits

Maximum Digits

Allowed Digits

Verify Input

Maximum Retries On Error

Prompt List

Track Failures

User Track Name

Grammar

Left Fill Length

Left Fill Character

Go Back Digit

Terminator Digit

Destination

Hide Data

Description

### 2.12.2.7 Selecting Go Back Digit

To select go back digit first click on the menu's down arrow which will display digit options. Select desired go back digit. The following is a sample image of the digit options:

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The screenshot shows a configuration window titled "Questions - Add Record". The fields and their values are as follows:

- Name: [Empty text box]
- Input Data Type: Credit Card
- Minimum Digits: 4
- Maximum Digits: 4
- Allowed Digits: 0123456789
- Verify Input: [Checked]
- Maximum Retries On Error: 3
- Prompt List: [Empty text box]
- Track Failures: [Unchecked]
- User Track Name: [Empty text box]
- Grammar: [Empty text box]
- Left Fill Length: No Fill
- Left Fill Character: 0
- Go Back Digit: None
- Terminator Digit: [Open dropdown menu showing options 1, 2, 3, 4, 5, 6, 7, 8, 9, =, #]
- Destination: [Empty text box]
- Hide Data: [Empty text box]
- Description: [Empty text box]

Buttons: Submit, Cancel

### 2.12.2.8 Selecting Terminator Digit

To select terminator digit first click on the menu's down arrow which will display digit options. Select desired terminator digit. The following is a sample image of the digit options:

## Guide To Creating An Auto-Attendant

**Questions - Add Record**

Name

Input Data Type **Credit Card**

Minimum Digits **4**

Maximum Digits **4**

Allowed Digits **0123456789**

Verify Input

Maximum Retries On Error **3**

Prompt List

Track Failures

User Track Name

Grammar

Left Fill Length **No Fill**

Left Fill Character **0**

Go Back Digit **None**

Terminator Digit **#**

Destination **None**

Hide Data

Description

**Submit** **Cancel**

### 2.12.3 Changing Questions

To change a question, first select a row to change then click the Change button. The following is a sample image of the Questions dialogue box:

**Questions - Edit Record**

Name: Get CVV

Input Data Type: Digits

Minimum Digits: 6

Maximum Digits: 6

Allowed Digits: 0123456789

Verify Input:

Maximum Retries On Error: 3

Prompt List: Digits

Track Failures:

User Track Name:

Grammar:

Left Fill Length: No Fill

Left Fill Character: 0

Go Back Digit: None

Terminator Digit: #

Destination: PayCardCVV

Hide Data:

Description: Get Credit Card CVV

**Submit** **Cancel**

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.12.4 Deleting Questions

To delete a question first select the row(s) to delete then click the Delete button.

## 2.13 Recordings

A Recording is the system playing the caller one or more prompts and then recording their answer.

### 2.13.1 Managing Recordings

To add, change, or delete recordings click on the Recordings item in the Auto Attendant submenu. The following image shows a sample grid for Recordings:

Recordings			
Name	Prompt List	Max Secs	Description
Get Email	hb_getemail1, hb_getemail2	30	Get email address
Get Items to Buy	hb_buy1, hb_buy2, hb_buy3	30	Get Items to Buy
Get Name	hb_getname1, hb_getname2	30	Get Customer Name

### 2.13.2 Add Recordings

To add recordings, click on the Add button. The following is a sample image of the Recordings dialogue box:

**Recordings - Add Record**

Name

Prompt List

Max Secs

Description

**Submit** **Cancel**

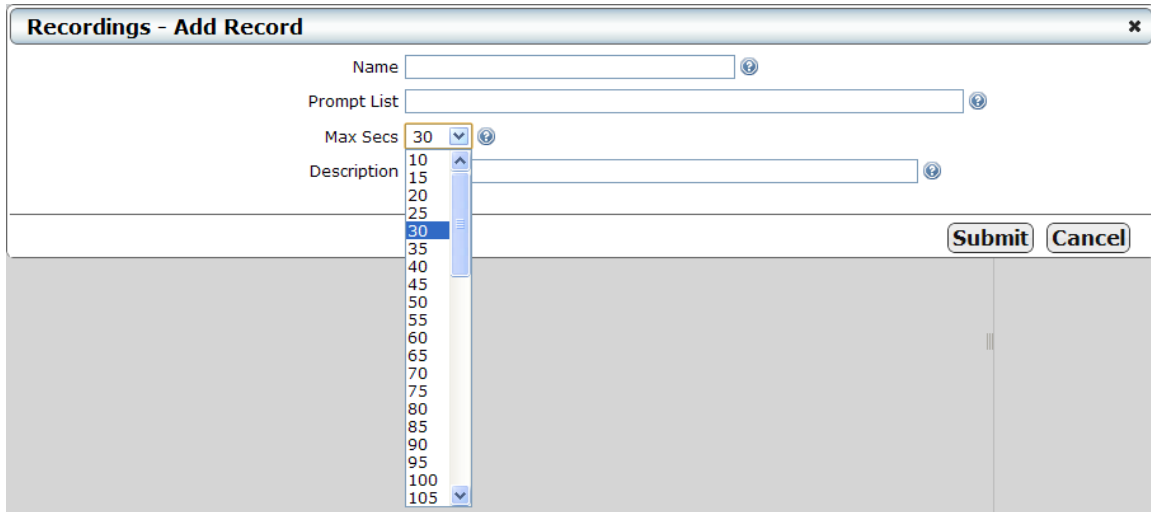
The following is an explanation of fields in this dialogue:

Field	Description
Name	Name for this entry
Prompt List	Comma separated list of Prompts to play
Max Seconds	Maximum number of seconds recording is allowed to last
Description	Description of this entry

After all values have been entered and selected click the Submit button.

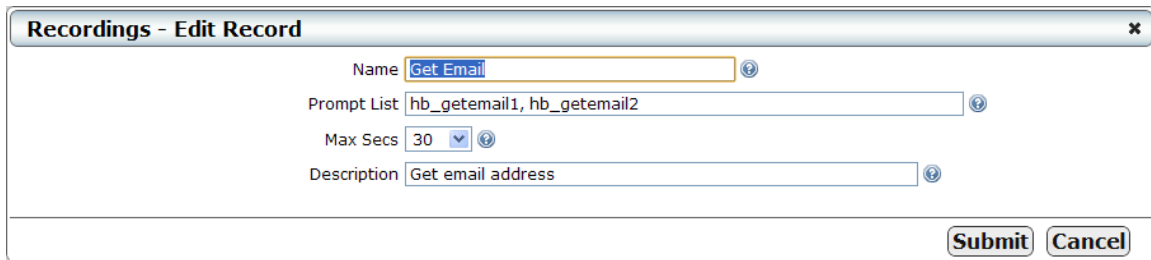
### 2.13.2.1 Selecting Max Seconds

**2.13.2.2** To select max seconds first click on the menu's down arrow which will display second options. Select desired quantity of max seconds. The following is a sample image of the quantity options:



### 2.13.3 Changing Recordings

To change recordings, first select a row to change then click the Change button. The following is a sample image of the Recordings dialogue box:



You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.13.4 Deleting Recordings

To delete a recording first select the row(s) to delete then click the Delete button.

## 2.14 Work Schedules

Most businesses have a definable schedule i.e., Days and hours when someone can talk to a customer and days and hours when no one is available to help a customer.

One or more Work Schedules can be created to specify your normal working days and hours. As an example, it is common for a business to specify their normal working hours as Monday through Friday from 9AM to 6PM.

### 2.14.1 Managing Work Schedules

To add, change, or delete work schedules click on the Schedules item in the Auto Attendant submenu. The following image shows a sample grid for Schedules:

Name	Enabled	S	M	T	W	T	F	S	Description
main2			✓	✓	✓	✓	✓		
workweek	✓		✓	✓	✓	✓	✓		mon-fri work week

### 2.14.2 Adding Work Schedules

To add a work schedule, click on the Add button. The following is a sample image of the Schedules dialogue box:

**Schedules - Add Record**

Name

Enabled

Description

Script

**Help** **Submit** **Cancel**

The following is an explanation of fields in this dialogue:

Field	Description
Name	Name for this entry
Enabled	Check this box if you want schedule to be used
Description	Description of this entry
Script	Optional script to run for this schedule

After all values have been entered click the Submit button. This adds the Schedule itself but does not specify the details of the working hours. Once the Schedule is added, click it and press the Change button to adjust hours.

### 2.14.3 Changing Work Schedules

To change a work schedule, first select a row to change then click the Change button. The following is a sample image of the Schedules dialogue box:

**Schedules - Edit Record**

Name:

Enabled:

Description:

Script:

**Schedule WeekDays**

WeekDay	Enabled	Start Time	End Time	Dual Time	Start Time 2	End Time 2
Sunday		00:00:00	00:00:00		00:00:00	00:00:00
Monday	✓	09:00:00	17:00:00		00:00:00	00:00:00
Tuesday	✓	09:00:00	17:00:00		00:00:00	00:00:00
Wednesday	✓	09:00:00	17:00:00		00:00:00	00:00:00
Thursday	✓	09:00:00	17:00:00		00:00:00	00:00:00
Friday	✓	09:00:00	17:00:00		00:00:00	00:00:00
Saturday		00:00:00	00:00:00		00:00:00	00:00:00

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Select the row of the day you would like to change then click the change button. The following is a sample image of the Schedules dialogue box:

**Change Monday Schedule** [X]

Enabled  ⓘ

Start Time 9:00 AM ⓘ

End Time 5:00 PM ⓘ

Dual Time  ⓘ

Start Time 2 Midnight ⓘ

End Time 2 Midnight ⓘ

**Submit** **Cancel**

The following is an explanation of fields in this dialogue:

Field	Description
Enabled	Check this box if you want to enable this schedule
Start Time	Start time of work schedule
End Time	End time of work schedule
Dual Time	Check this box if you want to enable another work schedule on this day
Start Time 2	Start time of second work schedule
End Time 2	End time of second work schedule

After all values have been entered and selected click the Submit button.

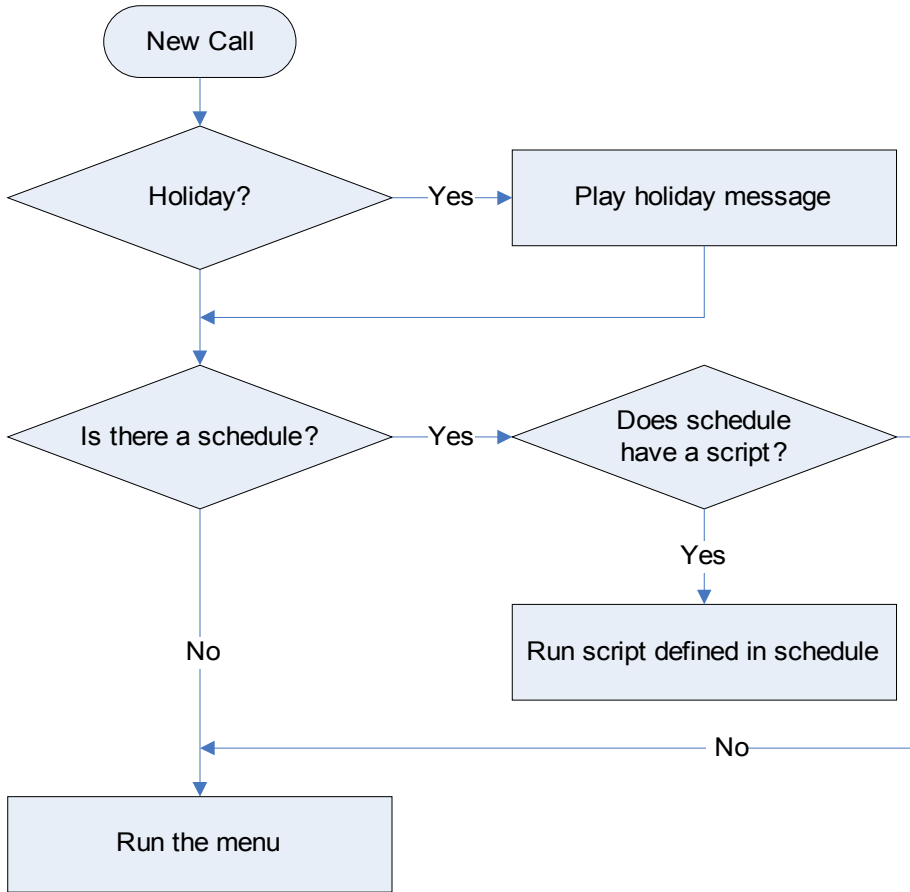
### 2.14.4 Deleting Work Schedules

To delete a work schedule first select the row(s) to delete then click the Delete button.

### 2.15 Script Segments

An Auto Attendant script can to be created if you want more control over the interaction with the caller.

Following is a flow chart of calls handled by a generic script that uses the above mentioned capabilities:



### 2.15.1 Managing Script Segments

To add, change, or delete script segments click on the Script Segments item in the Auto Attendant submenu. The following image shows a sample grid for Script Segments:

Name	Script Code	Description
New Call	RestartOnHangup Start // If the caller hangs up at any time, come back her	New Caller

### 2.15.2 Adding Script Segments

To add script segments, click on the Add button. The following is a sample image of the Script Segments dialogue box:

**Scripts - Add Record**

Name

Script Code

Conditional

Description

The following is an explanation of fields in this dialogue:

Field	Description
Name	Name of audio file to play as a prompt for this question
Script Code	Script source code. "Include", "goto", "run", "exec" statements and multi line comments are not allowed within the script segment
Conditional	Script test condition that determines whether this item is included. This is the text that should be inside an IVR script "if" statement
Description	Description for this item

After all values have been entered click the Submit button.

### 2.15.3 Sample Script Statement

Following is the sample AutoAttendant script using the features described above:

```

Start:
  RestartOnHangup Start // If the caller hangs up at any time, come back here
  Hangup
  Reset
  AnswerCall
  if $Result.AnswerCall == fail
    // AnswerCall failed for some reason, maybe the caller abandoned. Hangup
    // and add some sleep to prevent a tight fail loop in case it fails again.
    Goto Start
  endif

  If IsHoliday() = true then
    if Len($AA.HolidayMessage) > 0 // If there's a special holiday message
      Play $AA.HolidayMessage // then play it.
    else // Otherwise,
      Play ClosedMessage // play the "We're closed." message
    endif
  endif

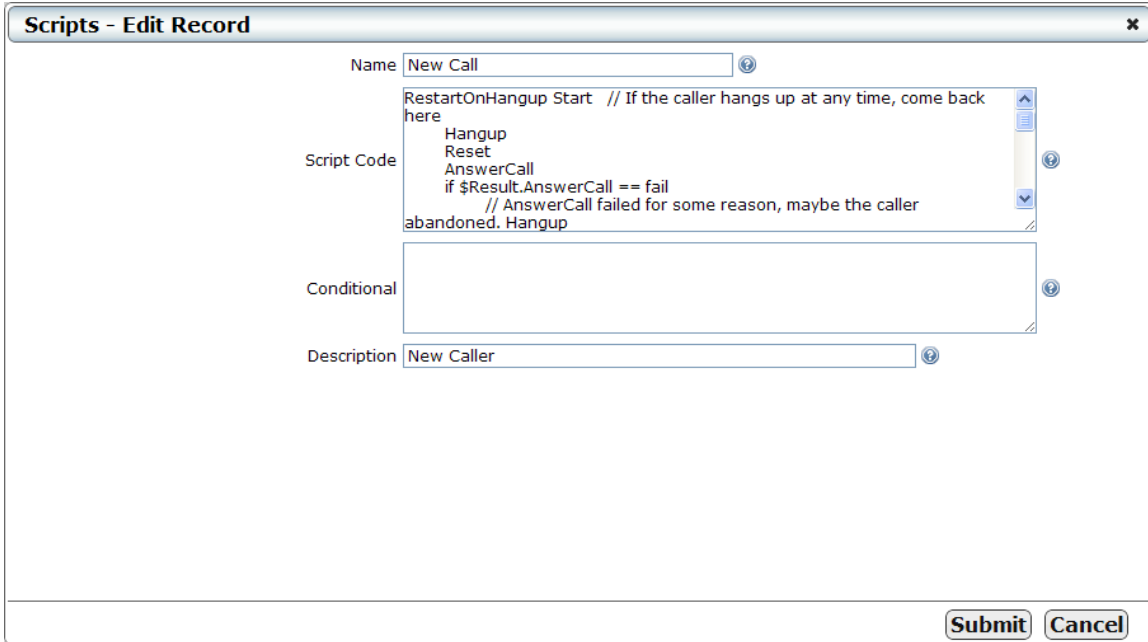
  if IsNormalWorkHours() == false
    Play ClosedMessage // Play the office closed message.
  endif

  Menu MainMenu

  Play ThankyouGoodbye
  Goto Start
    
```

### 2.15.4 Changing Script Segments

To change script segments, first select a row to change then click the Change button. The following is a sample image of the Script Segments dialogue box:



You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.15.5 Deleting Script Segments

To delete script segments first select the row(s) to delete then click the Delete button.

## 2.16 Transfer Destinations

You can set your auto attendant to transfer callers to a set destination which will provide caller information such as expected wait time and options such as electing to leave a voice message instead of waiting in queue for the call to be answered.

### 2.16.1 Managing Transfer Destinations

To add, change, or delete transfer destinations click on the Transfer Destinations item in the Auto Attendant submenu. The following image shows a sample grid for Transfer Destinations:

Transfer Destinations					
<input type="button" value="Add"/> <input type="button" value="Change"/> <input type="button" value="Delete"/> <input type="button" value="Select All"/> <input type="button" value="Unselect All"/> <input type="button" value="Help"/>					
Name	Enabled	Extension	Can Leave Messages	VoiceMail	Description
Customer Service	<input checked="" type="checkbox"/>	300	<input checked="" type="checkbox"/>	104	Customer Service Escalation

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### 2.16.2 Adding Transfer Destinations

To add a transfer destination, click on the Add button. The following is a sample image of the Transfer Destinations dialogue box:

**Transfer Destinations - Add Record** ✕

Name

Enabled

Extension

Delay Seconds

Delay Seconds Threshold

Can Leave Messages

Tell Delaytime

VoiceMail

Delay Message

Description

The following is an explanation of fields in this dialogue:

Field	Description
Name	Name for this destination
Enabled	Check this box when you want to activate this entry

Field	Description
Extension	The extension that should be transferred to
Delay Seconds	The delay in seconds before giving options to callers
Delay Seconds Threshold	Threshold delay in seconds before giving options to callers
Can Leave Messages	Check this box to enable callers to leave a message if tire of waiting
Tell Delay Time	Check this box to have the average time delay announced to callers
Voicemail	Voicemail box ID where callers can leave a message
Delay Message	Delay message
Description	Description of this entry

After all values have been entered click the Submit button.

### 2.16.3 Changing Transfer Destinations

To change transfer destinations, first select a row to change then click the Change button. The following is a sample image of the Transfer Destinations dialogue box:

The screenshot shows a dialog box titled "Transfer Destinations - Edit Record". It contains the following fields and values:

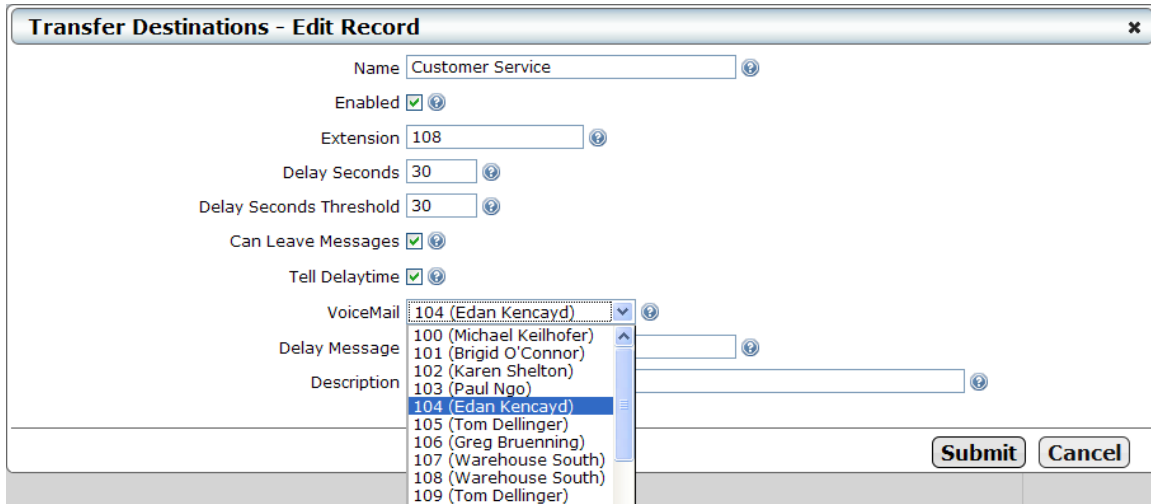
- Name: Customer Service
- Enabled:
- Extension: 300
- Delay Seconds: 15
- Delay Seconds Threshold: 30
- Can Leave Messages:
- Tell Delaytime:
- VoiceMail: 104 (Edan Kencayd)
- Delay Message: (empty)
- Description: Customer Service Escalation

At the bottom right, there are "Submit" and "Cancel" buttons.

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.16.3.1 Selecting Voicemail

**2.16.3.2** To select voicemail first click on the menu's down arrow which will display voicemail options. Select desired voicemail. The following is a sample image of voicemail options:



### 2.16.4 Deleting Transfer Destinations

To delete transfer destinations first select the row(s) to delete then click the Delete button.

## 2.17 Work Groups

A Work Group is a logical collection of extensions. Work Groups have common call handling and perform a like service. Typical Work Groups are: Sales, Customer Service, Billing, etc.

### 2.17.1 Managing Work Groups

To add, change, or delete work groups click on the Work Groups item in the Auto Attendant submenu. The following image shows a sample grid for Work Groups:

Work Groups					
<input type="button" value="Add"/> <input type="button" value="Change"/> <input type="button" value="Delete"/> <input type="button" value="Select All"/> <input type="button" value="Unselect All"/> <input type="button" value="Help"/>					
Work Group	Main Menu	Schedule	Night Message	Night Action	Night Value
main	7	workweek	aa_closed	Menu	main
main2	8	main2		Menu	main2

25 Page 1 of 1 Displaying 1 to 2 of 2 items

### 2.17.2 Adding Work Groups

To add a work group, click on the Add button. The following is a sample image of the Work Groups dialogue box:

**Work Groups - Add Record**

\* Work Group Name

Main Menu

Night Mode

Default Script

Default Language

Schedule

Night Message

Night Action

Night Value

Hold Audio File

Comments

The following is an explanation of fields in this dialogue:

Field	Description
Work Group Name	Name of this Work Group

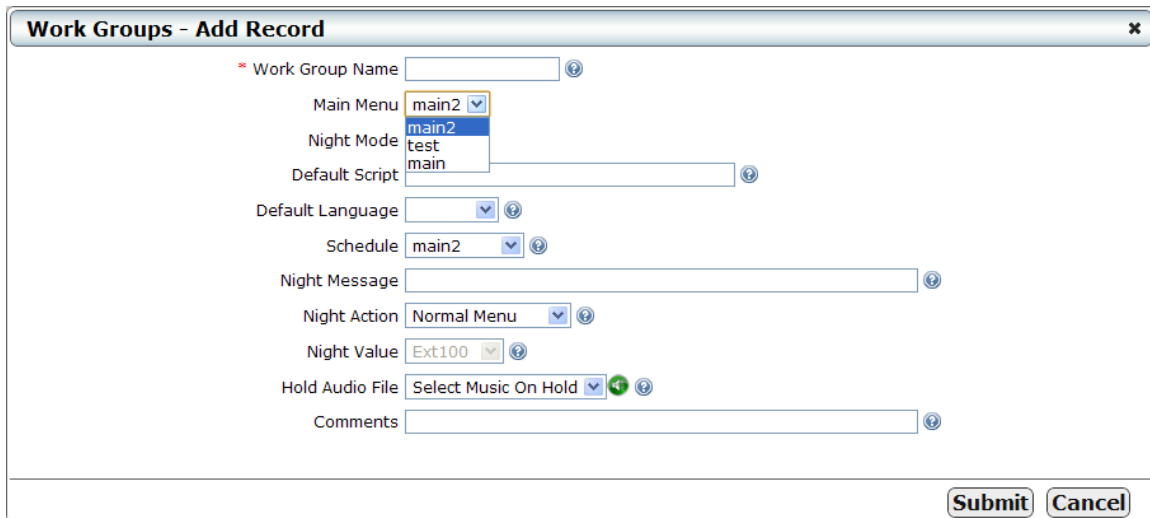
## Guide To Creating An Auto-Attendant

Field	Description
Main Menu	Menu to be played to callers sent to this Work Group
Night Mode	Check this box if you want to manually put this Work Group into night mode. Night mode means 'not normal working hours'
Default Script	If you have specialized call handling being performed by a script, enter its name here. This is normally left blank
Default Language	Language to be used for playing audio messages
Schedule	Defined work schedule for this Work Group
Night Message	If you want a special Message played when not in normal working hours, enter its name here
Night Action	Select action to take when not in normal working hours
Night Value	Select value for the specified night action
Hold Audio File	If you want a different music on hold played for this Work Group, select its name here
Description	Description of this entry

After all values have been entered and selected click the Submit button.

### 2.17.2.1 Selecting Main Menu

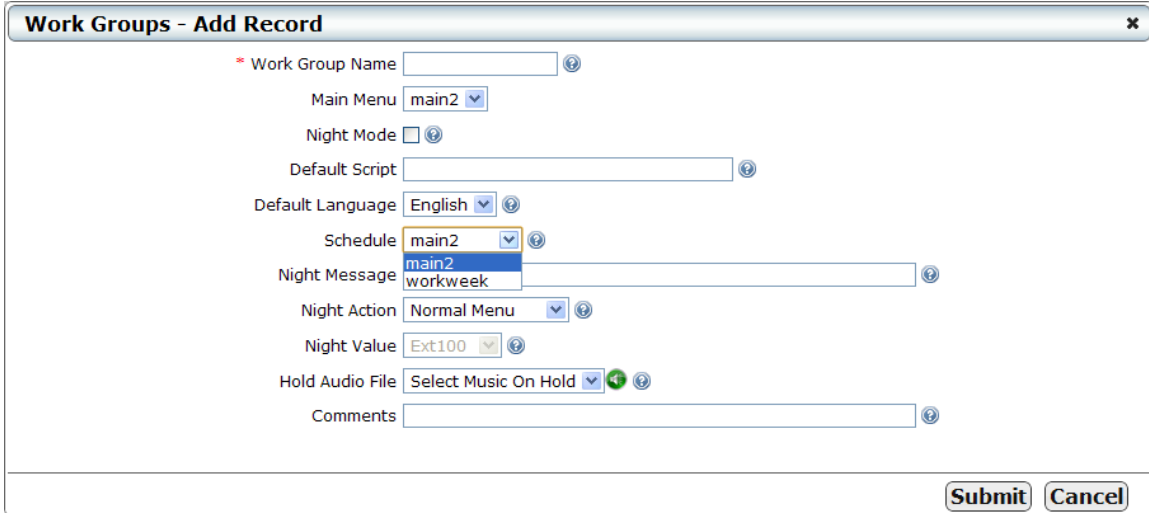
**2.17.2.2** To select main menu first click on the menu's down arrow which will display main menu options. Select desired menu. The following is a sample image of the main menu options:



The screenshot shows a web form titled "Work Groups - Add Record". The form contains several fields and dropdown menus. The "Main Menu" dropdown is currently open, showing three options: "main2", "test", and "main". Other fields include "Work Group Name", "Night Mode", "Default Script", "Default Language", "Schedule", "Night Message", "Night Action" (set to "Normal Menu"), "Night Value" (set to "Ext100"), "Hold Audio File" (set to "Select Music On Hold"), and "Comments". There are "Submit" and "Cancel" buttons at the bottom right of the form.

### 2.17.2.3 Selecting Schedule

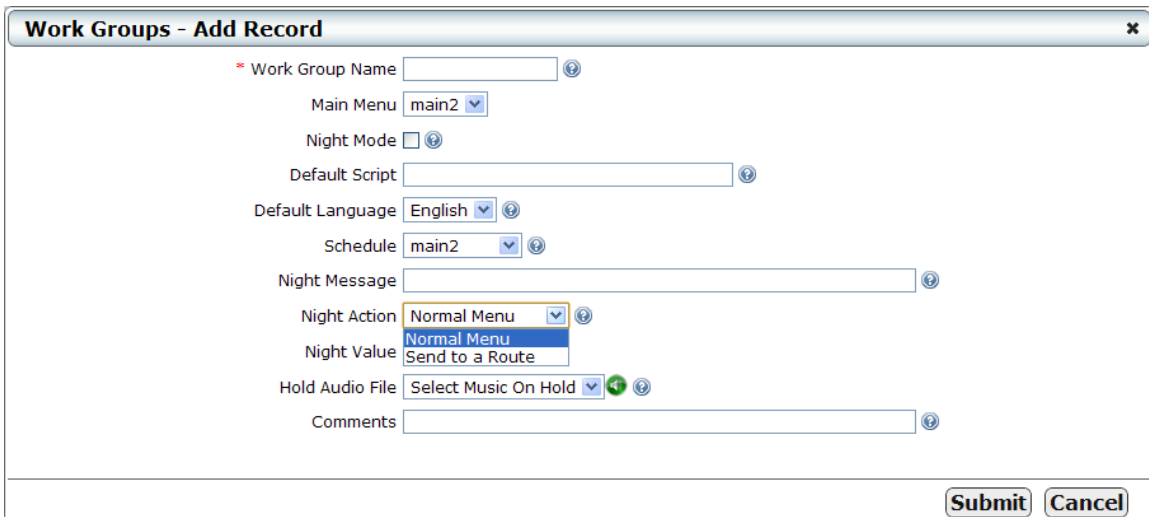
To select schedule first click on the menu's down arrow which will display schedule options. Select desired option. The following is a sample image of the schedule options:



The screenshot shows a web form titled "Work Groups - Add Record". The form contains several fields: "Work Group Name" (text input), "Main Menu" (dropdown menu with "main2" selected), "Night Mode" (checkbox), "Default Script" (text input), "Default Language" (dropdown menu with "English" selected), "Schedule" (dropdown menu with "main2" selected and a dropdown arrow), "Night Message" (text input), "Night Action" (dropdown menu with "Normal Menu" selected), "Night Value" (dropdown menu with "Ext100" selected), "Hold Audio File" (dropdown menu with "Select Music On Hold" selected), and "Comments" (text input). The "Schedule" dropdown menu is open, showing two options: "main2" and "workweek". At the bottom right of the form are "Submit" and "Cancel" buttons.

### 2.17.2.4 Selecting Night Action

To select night action first click on the menu's down arrow which will display night action options. Select desired action. The following is a sample image of the night action options:



The screenshot shows the same "Work Groups - Add Record" form. In this view, the "Night Action" dropdown menu is open, showing two options: "Normal Menu" and "Send to a Route". The "Schedule" dropdown menu is now closed and shows "main2" selected. All other fields and buttons remain the same as in the previous screenshot.

### 2.17.2.5 Selecting Hold Audio File

To select hold audio file first click on the menu's down arrow which will display audio options. Select desired hold audio file. The following is a sample image of the file options:

**Work Groups - Add Record**

\* Work Group Name

Main Menu

Night Mode

Default Script

Default Language

Schedule

Night Message

Night Action

Night Value

Hold Audio File

Comments

### 2.17.3 Changing Work Groups

To change a work group, first select a row to change then click the Change button. The following is a sample image of the Work Groups dialogue box:

**Work Groups - Edit Record**

\* Work Group Name

Main Menu

Night Mode

Default Script

Default Language

Schedule

Night Message

Night Action

Night Value

Hold Audio File

Comments

You will only be able to change the data for the row you selected. After changing desired data click the Submit button.

### 2.18 Deleting Work Groups

To delete a work group first select the row(s) to delete then click the Delete button.

# Evaluation

We hope you found this document useful, and easy to use. To help us provide you with the best documentation possible, we would like to get your feedback on this document. Please complete this form and use one of the following methods to return it to us:

- mail it to Telegato LLC  
801 East Campbell Road  
Suite 190  
Richardson, TX 75081
- fax it to (214) 853-5710
- email: support@telegato.com

Please check Yes or No.

- Is this manual technically accurate? Yes  No   
If no, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Is information missing? Yes  No   
If yes, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Are the organization and layout clear? Yes  No   
If no, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- Is information easy to find? Yes  No   
If no, please explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- How could we improve this document? \_\_\_\_\_  
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City: \_\_\_\_\_ State: \_\_\_\_\_  
Email: \_\_\_\_\_ Phone: \_\_\_\_\_



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