

How To Set Up Your Interactive Voice Response (IVR)



1. Begin by logging into your Customer Care Portal. This will bring a screen with all of your account information. Click on the **IP Centrex** tab.

The screenshot shows the top navigation bar of the Customer Care Portal. It includes a balance of 62.72 USD and four tabs: Dashboard, My Profile, IP Centrex, and Billing Information. The IP Centrex tab is highlighted with a red arrow. Below the navigation bar is a 'Recent Calls' table with the following data:

Date/Time	Account ID	From	To	Duration	Cost, USD	Play
2014-06-13 17:35:40						
2014-06-12 20:13:49						
2014-06-12 20:13:49						
2014-06-12 20:10:17						
2014-06-12 20:10:17						
2014-06-11 17:33:15						
2014-06-11 17:33:15						
2014-06-11 17:32:31						
2014-06-11 17:32:13						

2. Click **Phone Lines**.

The screenshot shows the IP Centrex configuration page. The navigation bar is the same as in the previous screenshot, but the IP Centrex tab is active. The main content area is titled 'General' and contains a sidebar menu with the following items: General, Extensions, Sites, Phone Lines (highlighted), External Numbers, Dialing Rules, Incoming Calls, Outgoing Calls, Call Recording, Huntgroups, Identity, and Music On Hold. The main content area displays the following configuration options:

- Paging/Intercom
- Paging/Intercom Prefix
- Extension Number Length



3. You should now see a list of all your phone numbers. Click on the **Configure Icon (blue wrench)** next to the phone number you would like to edit.

C...	ID	Assigned ...	Customer ...	Idle, days	Available ...
	18552222924		0	14	Unlimit

4. This brings up the dashboard page for the number you're going to edit. From here, click on the **IP Centrex** tab again.

Date/Time	From	To	Duration	Cost, USD	Play
2014-06-13 17:35:40					
2014-06-12 20:13:49					
2014-06-12 20:13:49					
2014-06-12 20:10:17					
2014-06-12 20:10:17					



5. Click on the **Voicemail** tab on the left-hand side.

HNH Edit Phone Line: 18552222924

Dashboard My Profile IP Centrex Billing Information

Advanced Forwarding

Currently you are using **Order**
There are **no numbers** which will be used in the ringing group.

When **your number** is called and the call is **not answered** on your IP p then **forward** the call to :

Edit	Order	Number
There is no data to display		

6. Click on the **Go To UM Web Interface** button. If you're unable to do so, that means your Unified Messaging is not enabled. Please contact support@callforwarding.com and one of our representatives will enable this feature for you.

HNH Edit Phone Line: 18552222924

Dashboard My Profile IP Centrex Billing Information

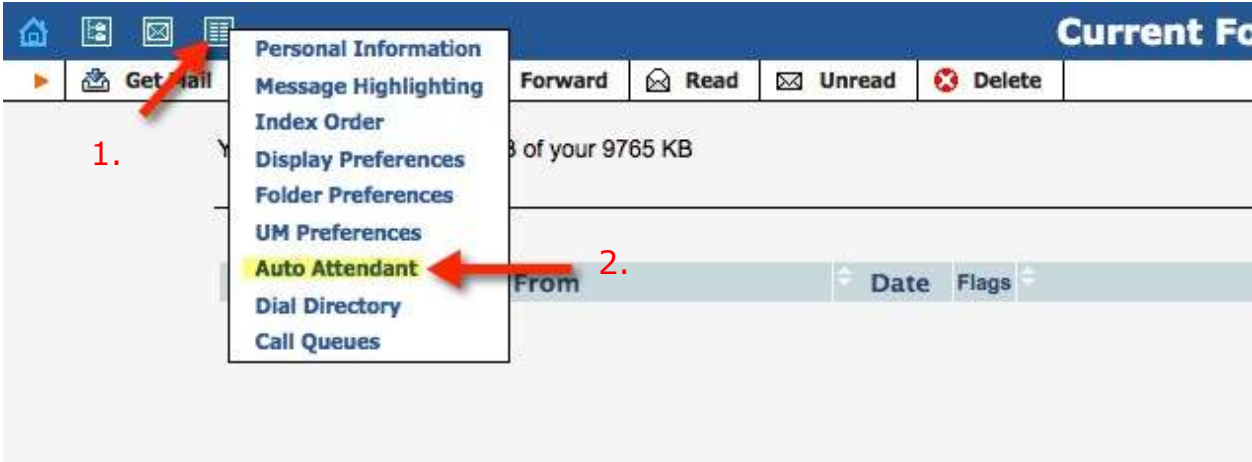
Voicemail

Unified Messaging

Go to UM Web Interface



7. You should now see your UM Folder. Hover your mouse over the box in the corner and select **Auto Attendant**.



8. Select **Root**.



9. This is the IVR Setup Menu.

9a. The **Menu section** allows your customers to press keys that are recognized while the recording is being played. An example would be "Press 1 for Sales. Press 2 for Support."

9b. The **Intro** section allows you to upload a message that your customers must listen to before making a selection. An example would be, "Thank you for calling. Our hours of operations are Monday through Friday, 9:00am – 5:00pm."

The screenshot shows the 'Edit "ROOT" Menu' interface. At the top, there are navigation buttons: 'Save', 'Save & Close', and 'Close'. Below this, the 'Name' field contains 'ROOT' and the 'Active' field contains 'Always'. There are 'Always' and 'Wizard' buttons next to the 'Active' field. The interface is split into two main sections: 'Intro' on the left and 'Menu' on the right. Both sections have a 'Custom' radio button selected, a 'Browse...' button, and a 'None' radio button. The 'Intro' section also has a 'Timeout' section with 'Standard' selected and a 'Caller Will Hear' text box containing 'No input so far.'. The 'Menu' section has an 'Unavailable' section with 'Standard' selected and a 'Caller Will Hear' text box containing 'This selection is not available.'. Red arrows point to the 'Intro' and 'Menu' section headers.

9c. To upload an audio file, simply click **Custom** and then **Browse** under the Menu or Intro tab and select the audio file you wish to upload. **The file must be in .MP3 format.** Select **Custom** and **Save** after your file has uploaded.

This screenshot is identical to the one above, but with numbered annotations. A red arrow labeled '1.' points to the 'Browse...' button in the 'Intro' section. A red arrow labeled '2.' points to the 'Browse...' button in the 'Menu' section. A red arrow labeled '3.' points to the 'Save' button at the top left of the interface.

10. Now, it's time to set up your command options and ring-to phone numbers.

10a. The **Event** column shows all of the different command options that your customers can select. We can make commands for all of the keys on the dial pad of your phone. For example, if your recording says "Press 1 for Sales" then you'll want Event number 1 to ring to your sales department or a specific sales representative.

10b. The **Action** column is where we tell the system what to do for each Event. There are two options you can use:

1. **Transfer** – Use this to transfer to an Extension or Hunt Group that we have built in the system for you.
2. **Transfer to E.164** - Use this to transfer to an actual phone number. E.164 is simply the format we use when entering phone numbers. Type the number with the country code first and then the number.

Event	Action	Destination	Max Size	Play Before Action	File
Not Active	Unavailable			<input type="checkbox"/>	Browse... No file selected.
1	Unavailable			<input type="checkbox"/>	Browse... No file selected.
2	Unavailable			<input type="checkbox"/>	Browse... No file selected.
3	Unavailable			<input type="checkbox"/>	Browse... No file selected.
4	Unavailable			<input type="checkbox"/>	Browse... No file selected.
5	Unavailable			<input type="checkbox"/>	Browse... No file selected.
6	Unavailable			<input type="checkbox"/>	Browse... No file selected.
7	Unavailable			<input type="checkbox"/>	Browse... No file selected.
8	Unavailable			<input type="checkbox"/>	Browse... No file selected.
9	Unavailable			<input type="checkbox"/>	Browse... No file selected.
*	Unavailable			<input type="checkbox"/>	Browse... No file selected.
0	Unavailable			<input type="checkbox"/>	Browse... No file selected.
#	Unavailable			<input type="checkbox"/>	Browse... No file selected.
Timeout	Unavailable			<input type="checkbox"/>	Browse... No file selected.
Fax	Unavailable			<input type="checkbox"/>	Browse... No file selected.



11. You can also have your customers listen to a message before taking an action. For example, your customers might hear "Please hold for the transfer" before the call is transferred to a specific individual or department.

Select **Play Before Action**, and upload the audio file your customer will listen to. This file must be saved as an MP3.



The screenshot shows a table with the following columns: Event, Action, Destination, Max Size, Play Before Action, and File. The 'Event' column has a 'Not Active' status. The 'Action' column contains dropdown menus with 'Unavailable' or 'Transfer to E.164 number'. The 'Destination' column contains E.164 numbers. The 'Play Before Action' column contains a red arrow pointing to a play button icon. The 'File' column contains a 'Choose File' button and the text 'No file chosen'.

Event	Action	Destination	Max Size	Play Before Action	File
Not Active	Unavailable				Choose File No file chosen
1	Transfer to E.164 number	91111111111			Choose File No file chosen
2	Transfer to E.164 number	16782028888			Choose File No file chosen
3	Unavailable				Choose File No file chosen
4	Unavailable				Choose File No file chosen
5	Unavailable				Choose File No file chosen
6	Unavailable				Choose File No file chosen
7	Unavailable				Choose File No file chosen

12. When you are finished, click **Save and Close**.