Auto Attendant Setup

Option 1: Entering Your Announcement Boxes for the First Time

Currently you can enter the Voice mail system by dialing *5000.

You will hear the system prompt you for the mailbox number. Enter the mailbox number that you will be working on...(below) you will then hear “Password” which is currently set to be the same as the extension number if this is your first time entering the system. Enter your password and you will be prompted to change your password. Please set your password to be something other than this mailbox number.

You will now be guided through setting up the voice mail announcements. When the system asks you for your name, simply describe the announcement box. Something Like “Main Auto attendant box” will do. Next the system will prompt you to record the “unavailable” and “busy” greetings. Please record what you would like the caller to hear when this box is played. Again, if this is for the “Main Auto Attendant—Day or Night” it uses the “busy” announcement, record something like : “Hello and Thank You for calling XYZ Company, if you know your parties extension you may dial it at any time, for a company directory please press star now.

- For Sales Press 1
- For Support Press 2
- For Billing Information Press 3
- To leave a message in our General Company Voice mail Box Press 4

Do the same thing for all of the boxes and then test your system by dialing your main number and allowing the auto attendant to pick up.

Option 2: Entering Your Announcement Boxes to “Re-record” Announcements

Currently you can enter the Voice mail system by picking up a CoreDial supplied phone that is on your system, picking up the hand set and dialing [*5000]

You will hear the system prompt you for the mailbox number. Enter the mailbox number that you will be working on....(below) you will then hear “Password” Enter the password and you will be placed at the main menu. Press 0 For Mail Box Options and follow the prompts to record your unavailable or busy greetings which correspond to your auto attendants. Again, if this is for the “Any Auto Attendant” it uses the “busy” announcement, record something like :

“Hello and Thank You for calling XYZ Company, if you know your parties extension you may dial it at any time, for a company directory please press star now.

- For Sales Press 1
- For Support Press 2
- For Billing Information Press 3
- To leave a message in our General Company Voice mail Box Press 4”

Do the same thing for all of the boxes and then test your system by dialing your main number and allowing the auto attendant to pick up.
Voicemail Setup

To initially set up voicemail, press the “message” key on your phone (or dial * and ext. number if you have a poly 301 or 320), and enter your password, which is your extension number. At this point, you will be guided through the process of a first time set-up. Follow the prompts to set up your name, greetings, and new password. You should change your password when prompted to something other then your extension. If you leave your ext. number as your password, each time you access your VM box, you will hear the set up wizard again, so we highly recommend changing it. Also, your name that you record in the mailbox will be the same recording callers here when they access the company directory.

Checking your voicemail from a PolyCom phone on site

1. Press the Messages Button, or dial *(star) and your ext.#
2. Enter your password + “#” (Default is your extension number)
3. Follow the prompts

MAIN MENU OPTIONS:

1. New/old messages ( *-asterisk=rewind; #=fast fwd. )
2. Change folders
3. Advanced options
   1. Leave msg. for another user
   * Return to main menu
0. Mailbox options
   1. Record unavailable greeting
   2. Record busy greeting
   3. Record name
   4. Record temporary greeting
   5. Change password
   * Return to main menu
* Help
# Exit

Mailbox Options after listening to a message:

3. Advanced options
   1. Send reply
   3. Hear envelope (date/time, phone number of caller)
   5. Leave msg. for another user
   * Return to main menu
5. Repeat current msg.
6. Play next msg.
7. Delete
8. Forward to another user
9. Save to folder
0. New
1. Old
2. Work
3. Family
4. Friends
* Help
# Exit
Checking Voicemail Remotely (For this option to work your calls must go directly to an auto attendant)

1. Call main number, at main auto attendant press “#” (Or option configured for Voice mail)
2. When you hear the prompt enter your box number
3. When you hear the prompt Enter your password + “#”
4. Follow the voice mail menu prompts

Putting a Client ON HOLD

When you receive a call and want to place this client ON HOLD to ask a question or take another call, simply select the key that corresponds to Hold on your display or the Hold button on the bottom right side of phone

Retrieving a Client from Being ON HOLD

To pick up a client that you placed ON HOLD

Simply select the line they are on (from the keys to the left of the display screen). If you have a custom configuration and have multiple different lines on the same phone then you must select the line they are on using the keys on the left and then press the Resume key from the display if they are the only client you have ON HOLD. If you have multiple callers on hold, use the arrow keys to scroll up or down to the callers on each corresponding line key.

Transferring Calls

There are two different ways to transfer:

A. Announcing a transferred call- This is also referred to as an “Attended Transfer” because it allows you to talk to the person you are transferring the call to before actually transferring the call. Also note that the person you are transferring the call to will see the callerID of the phone “you” are calling from.

B. Blind transfer of a call- This is a “Non-attended” transfer in that as soon as you press “Blind + number_to_xfer_to” the call will be immediately be transferred, but unlike option “A” above, the person you transferred the call to will see the CallerID of the person who originally called you.

Transferring a Call to an “In-house” Extension

When you receive a call that needs to be transferred to another employee, first inform the caller that you are going to transfer the call. Then select the Transfer key (on left side of phone) or the from the Transfer key from the display. Type in the employee’s extension number and push Send. Wait for employee to answer, announce the caller and select Transfer again to completely transfer the call. If employee is on the phone or away from the desk, you can simply select Transfer for the call to go into the employee’s voicemail or you can the end the transfer and go back to the client.

Transferring a Call to an Employees Cell or Other Phone

When you receive a call that needs to be transferred to an employee’s cell phone or other outside, first inform the caller that you are going to transfer the call. Then select the Transfer key (on left side of phone) or the from the Transfer key from the display. Type in the employee’s complete cell phone number. Wait for employee to answer, announce the caller and select Transfer again to completely transfer the call. If employee can not answer their cell phone, you can simply hit Transfer for the call to go into the employee’s cell phone voicemail or you can the end the transfer and go back to the client to see if they want to go into that employee’s voicemail.

Blind Transferring a Call to an “In-house” Extension

When you receive a call that needs to be transferred to another employee, first inform the caller that you are going to transfer the call. Then select the Transfer key from the display, then the Blind key (on
screen). Then type in the employee’s extension number and press Send. The call immediately goes to that extension with the Caller ID of the person.

**Blind Transferring a Call to a Cell Phone**

When you receive a call that needs to be transferred to another employee, first inform the caller that you are going to transfer the call. Then select the Transfer key from the display, then the Blind key (on screen). Then type in the employee’s cell phone number. The call immediately goes to that cell phone with the Caller ID of the person calling not your extension.

**Transferring a Call to an “In-house” Extension when a Second Call Comes in at Same Time**

When you receive a call that needs to be transferred to another employee and a second call comes in at the same time, you will have the choice to put the first call on hold or transfer them before taking the second call. Once this is done, you can take second call by selecting the line the call is on (line 1, 2, or 3).

**Setting Up a Conference Call between Yourself and Two Other Callers**

When you receive a call and want to add another person in to the call, first inform the caller that you are going to get a conference call initiate between the two of you and the third person. Then select the Confrnc key from the display or the Conference key from the left side of phone, type in the employee’s extension #, cell phone # or any phone #. Wait for this person to pick up, explain that you want to add them to the call you have and select the Confrnc key from the display. All 3 people will now be on the same call together.

To end Conference Call - simply hang up OR select Split to split the individual calls out from the conference so you can speak to them individually Setting Up Call Forward on your Desk Phone When you want to set up your desk phone to forward all calls to your home or cell phone, please select Forward key from the display, type in the phone number that you want all calls to go and select Enable Removing Call Forward from your Desk Phone When you want to remove call forward off your phone, please select Forward key from the display and it then Disable. Set Your Phone to DO NOT DISTURB

When you want to set up your phone to not ring (when you are not there or you are in the middle of a meeting), please select the Do Not Disturb key from the right side of the phone set.

Take Your Phone Off DO NOT DISTURB

When you want to remove the DO NOT DISTURB feature from your phone, please select the Do Not Disturb key from the right side of the phone set. To See Any Missed, Received, or Placed Calls Select the directories key from the left side of the phone set, then 2. You can then select one of the following:

1 for missed calls 2 for received calls 3 for placed calls

Then select Exit when you are finished.