



USER GUIDE

Virtual Receptionist

with Call Manager



CenturyLink[®]
Business

Welcome to Virtual Receptionist

Virtual Receptionist can help your business save money and time, and give your customers a much better experience when they call. Whether you have one telephone number to manage, or many – your calls can be handled exactly the way you want them to be.

Through the Call Manager Administrative portal, you'll have total flexibility to set up your office hours and holidays, and to define all the menus callers will choose from and announcements they will hear. Route calls automatically to any phone number and set up actions you want certain keys to perform.

System Requirements

- A computer with one of the following browsers: Internet Explorer 7.0 and above; Firefox 2.0 and above; Chrome 8.0 and above; Safari 4.0 and above; and MSN Explorer 9.0 and above.
- A computer that supports one of the above browsers and has the sound card, speakers and software that can play audio files such as Windows Media Player or Apple QuickTime.
- A Small Business Control Center User ID and Password (go to sbcontrolcenter.centurylink.com to register).
- High-speed Internet connectivity. CenturyLink Business High-Speed Internet with 1.5 Mbps or higher is recommended.

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 **Look for this symbol throughout this guide and online for tips and information.**

Services not available everywhere. CenturyLink may change or cancel services or substitute similar services at its sole discretion without notice. Subject to applicable restrictions, tariffs and service agreements. Contact CenturyLink for details.


CenturyLink™ Virtual Receptionist: Requires CenturyLink business phone line and acceptance of CenturyLink Call Manager terms and conditions. Also requires a CenturyLink Small Business Control Center User ID and password. Requires a computer with Internet Explorer 7.0 and above, Firefox 2.0 and above, Google Chrome 8.0 and above, Safari 4.0 and above, or MSN Explorer 9.0 and above. Sound card, speakers and software required to play audio files (voicemails). Not compatible with Hunting.

Login to Control Center

- How to get to the Call Manager portal to access and manage Virtual Receptionist

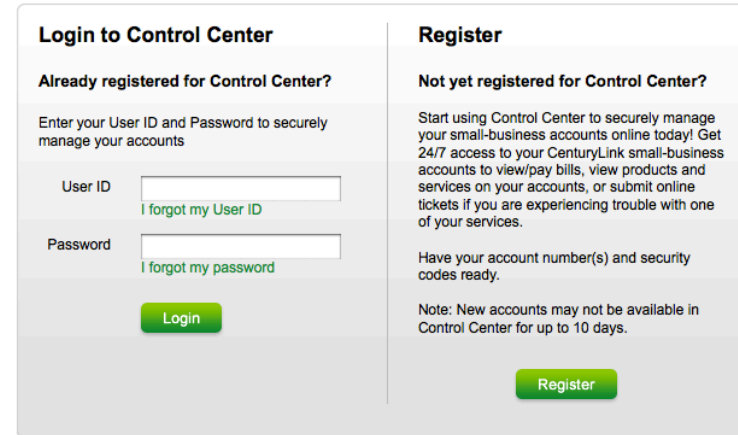
Let's get started:

- Go to <http://sbcontrolcenter.centurylink.com>
- Sign in with your Small Business Control Center User ID and Password.
If you are the **Administrator** for the business, and don't already have a Small Business Control Center User ID and Password, click the [Register](#) button to sign up.
If you are an **Individual User**, ask your Administrator to set up your User Profile and provide you with a User ID and Password.

 **The person who is the designated Administrator for your CenturyLink account should initiate your Virtual Receptionist service and set up User IDs and access levels for each Individual User.**

The Administrator has overall responsibility for granting access to the various Virtual Receptionist features.

Individual Users will only be able to access the specific sections they have been given permission to manage.



The screenshot shows a web interface with two main sections: 'Login to Control Center' and 'Register'.

Login to Control Center

Already registered for Control Center?

Enter your User ID and Password to securely manage your accounts

User ID [I forgot my User ID](#)

Password [I forgot my password](#)

Register

Not yet registered for Control Center?

Start using Control Center to securely manage your small-business accounts online today! Get 24/7 access to your CenturyLink small-business accounts to view/pay bills, view products and services on your accounts, or submit online tickets if you are experiencing trouble with one of your services.

Have your account number(s) and security codes ready.

Note: New accounts may not be available in Control Center for up to 10 days.

Setup: Users

- Set up User ID and Passwords for each person or department
- Assign Administrator and User access levels

Before you start using Virtual Receptionist, the designated Administrator for your business must set up User IDs and Passwords for each person who will be authorized to log in to use the service. Individual users can be assigned Administrator or Non-Administrator status.

Administrator Instructions

Step 1. Add Users to Call Manager

- You should be logged in to the Small Business Control Center.
- Choose **Control Center Admin** at the top, then choose **Manage Users**.
- Click **Add an Authorized User**. You will be asked to assign a unique User ID for each person. Click **Check Availability** to verify that no one else is using that ID. If that ID is available, follow the screen and fill in the rest of that person's information.

Add a New User

To add a user to your Control Center profile, you will

- Create a user ID for the new user.
- Create an initial password for the user (can be changed later).
- Select access privileges.

Control Center User Information * =Required

User ID * 4 or more characters, only letters and numbers.

- Assign an initial password for this User. Make sure to make a note of it and provide the password to the person who will use it.
- Next, decide whether this User will have Administrator or Non-Administrator privileges, and whether they will be allowed to access the Call Manager portal to use the Virtual Receptionist features.
- Click **Save** when you are finished with this User.
- Continue adding all your other individual Users.
- Return to this screen at any time to add, edit or delete Users.

CenturyLink Business Log Out

Residential Small Business Large Business Control Center Help: 800-350-1044
7am-8pm MT M-F, 10am-2pm Sat

Control Center Home | Your Services | Billing | Shop | **Control Center Admin** | Support

Control Center Admin

Overview Manage Accounts **Manage Users** Product Recommendation Preferences Call Manager Settings

Manage Users

First Name	Last Name	Access	
Richard	User		Delete User
Jason	Admin	Admin	Delete User
Patty	User		Delete User

Add an authorized user

Control Center User Information

User ID *

Date Created : 04/11/2012

First Name *

Last Name *

Control Center Password

New Password

Confirm New Password

Passwords must contain 8 or more characters, must include at least one number and one letter, must not contain any part of your user ID, and must be different from any previous Control Center password you may have had.

Control Center Access

User Role * Administrator Non-Administrator

What are the differences between admin and non-admin users?

At least one role must be selected

Account Management
Access to all account management features

Call Manager
Access to Voice Pack, Virtual Receptionist and One Number Service features

Call Manager phone number assignments: None


Setup: Users (continued)

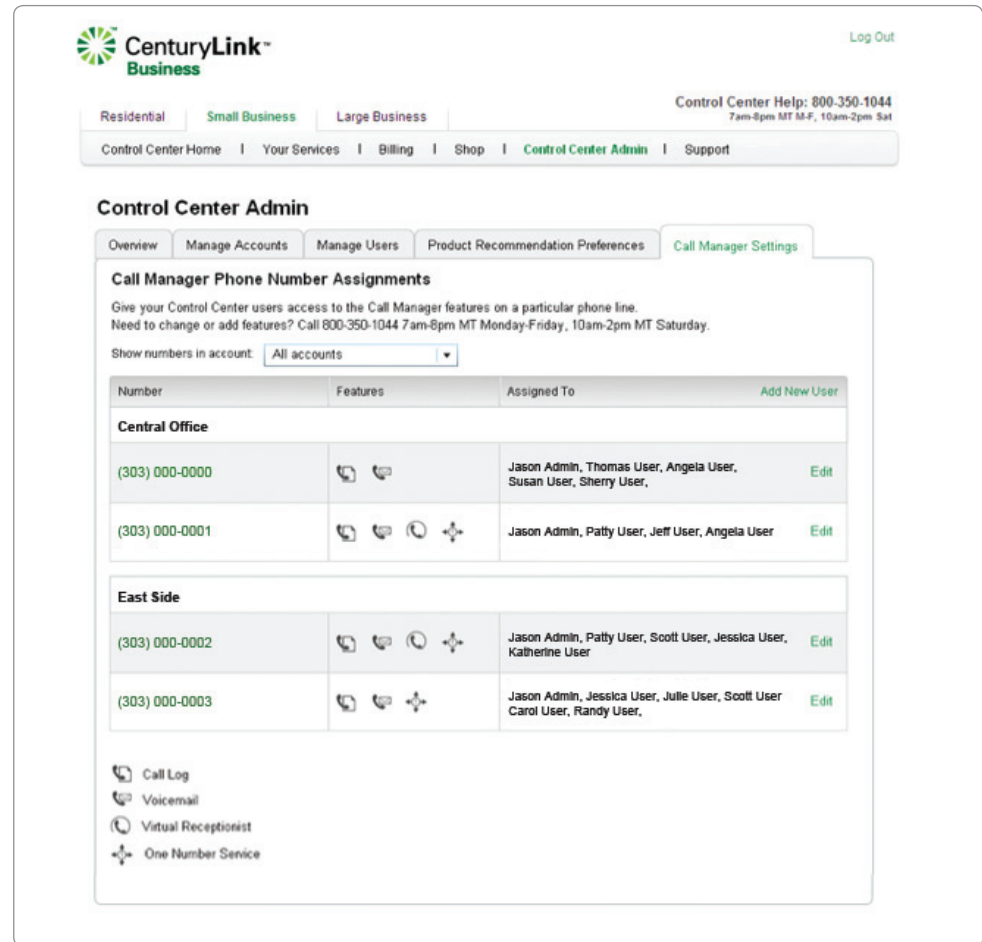
- Assign Users to phone lines

After all the Individual Users have been established with their User IDs, passwords and privileges, now the Administrator assigns Users to the phone lines they will be accessing and managing. Several Users can be assigned to the same phone number. Users that are not assigned to specific numbers will be able to log in and view information in Call Manager, but will only have Read Only privileges.

Administrator Instructions

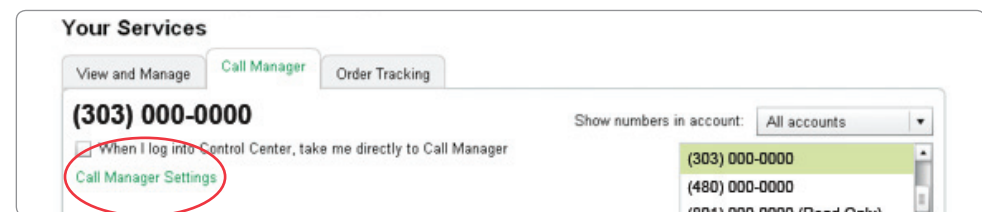
Step 2. Assign Users to the line(s) they will access

- Log in to the Small Business Control Center.
- Choose **Control Center Admin** at the top, then choose **Call Manager Settings**.
- You will see a list of all your CenturyLink accounts with the phone numbers that belong to each. The business in this example screen has two locations. In the Features column, an icon  indicates which lines have Virtual Receptionist available.
- Click **Edit** next to the number you want to assign Users to.
- From the **Edit Assigned Users** pop-up list, choose the individuals who will be using this number. The list should already include all the available Users that you set up in Step 1 on page 4.
- If you need to add another User at this point, you can also click the **Add a New User** link on this page and it will take you back to the steps outlined on page 4.
- Return to Call Manager Settings at any time to add, edit or delete Users from each line.
- Hint: You can also get to this Call Manager Settings screen via the link on the Call Manager Home Page.



The screenshot shows the CenturyLink Business Control Center Admin interface. At the top, there's a navigation bar with "Residential", "Small Business", and "Large Business" tabs. Below that, there's a "Control Center Admin" section with tabs for "Overview", "Manage Accounts", "Manage Users", "Product Recommendation Preferences", and "Call Manager Settings". The main content area is titled "Call Manager Phone Number Assignments" and includes a dropdown menu for "Show numbers in account" set to "All accounts". Below this is a table with columns for "Number", "Features", and "Assigned To". The table is divided into two sections: "Central Office" and "East Side". Each section contains rows for phone numbers with their respective features and assigned users. There are "Edit" links next to each row. At the bottom, there are icons for "Call Log", "Voicemail", "Virtual Receptionist", and "One Number Service".

Number	Features	Assigned To	Add New User
Central Office			
(303) 000-0000		Jason Admin, Thomas User, Angela User, Susan User, Sherry User,	Edit
(303) 000-0001		Jason Admin, Patty User, Jeff User, Angela User	Edit
East Side			
(303) 000-0002		Jason Admin, Patty User, Scott User, Jessica User, Katherine User	Edit
(303) 000-0003		Jason Admin, Jessica User, Julie User, Scott User, Carol User, Randy User,	Edit



The screenshot shows the "Your Services" section of the CenturyLink Business Control Center Admin interface. It has tabs for "View and Manage", "Call Manager", and "Order Tracking". The main content area is titled "(303) 000-0000" and includes a dropdown menu for "Show numbers in account" set to "All accounts". Below this is a checkbox labeled "When I log into Control Center, take me directly to Call Manager". A red circle highlights the "Call Manager Settings" link next to the checkbox. To the right, there's a list of phone numbers: "(303) 000-0000", "(480) 000-0000", and "(801) 000-0000 (Read Only)".

About Virtual Receptionist

- How to use Virtual Receptionist
- Setup Checklist

Virtual Receptionist is a self-managed automated phone attendant. When Virtual Receptionist is turned on, it answers your calls automatically, and offers your callers a list of options (a "menu") that you define. You can allow your callers to listen to messages (such as your opening times) or to be transferred to a real person. Setup is completely flexible and can be edited at any time to suit the needs of your business.


Some examples of Virtual Receptionist in use

"Welcome to Bob's Tires. The store is now open. To hear directions to our store, press ①. To hear store hours, press ②. If you know the extension of the person you'd like to reach, press ③, and then enter the extension followed by the pound key. If you know the name of the person, press ④③, and then enter their name followed by the pound key. Or, for any other inquiries please press ⑤."

You can create different menus for different times of the day and week that play according to the pre-defined schedules that you have created. See how the announcement changes:

"Welcome to Bob's Tires. Our store is currently closed. To hear directions to our store, press ①. To hear our store hours, press ②. If you want to leave a message, press ③, and we will get back to you as soon as possible."


Once you have set up Virtual Receptionist with your own schedules, menus and announcements, it will automatically play callers the correct menu no matter what time they call.

 **You may find it helpful to map out your Virtual Receptionist menu and schedules on paper first, particularly if you will have several schedule periods and complex menu options. Plan out each option that you want to offer your callers, and decide which number key they will press to access it.**

Setting up Virtual Receptionist Step by Step

Use this checklist to complete your setup:

- Make sure you have set up Users first (see pages 4-5).
- Set up your open, closed and holiday hours **Schedule**.
- Build the **Menu** options that you want to offer your callers during the different schedule periods that you have just created.
- Now you are ready to record the **Announcements** that your callers will hear for the menu options.
- Configure any **Extensions** your callers can dial.
- Change to any of the built-in key defaults on the **Advanced** tab or change the way Virtual Receptionist handles caller error.
- All set? Return to the **Main tab and turn on** Virtual Receptionist.

 **IMPORTANT: Do not turn Virtual Receptionist ON until you have completed the setup! If you turn on Virtual Receptionist and your setup is incomplete, callers to your business will hear a message that the number is unreachable. See page 9.**

Helpful Hints

- Things to remember when you're using Virtual Receptionist
- Key to icons and warnings

Pay attention to the Intro and Help Panels

The Schedule, Menus, Announcements and Extensions tabs all have a green intro panel that you will see the first time you access the tab. This panel outlines the basic tasks that you do in this section.

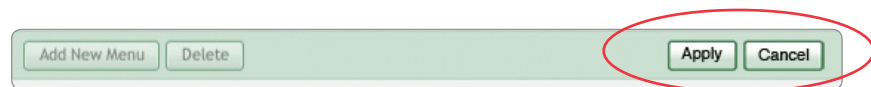
Note that the Schedule tab only displays the intro panel the first time. As soon as you save something on that page, the first-time hints expire. The Extensions tab only displays the hints if no extensions have been set up yet. You may want to print out or take a screen shot of the intro hints to save for later.

 You can always click  for help and tutorials at any time.

Make sure to Apply



At the bottom of each entry screen, there will be a row of buttons similar to the diagram above. As you're entering new information, the buttons on the left will be active. Once you've made your entry, the Apply and Cancel buttons become active instead.



You will not be able to navigate away until you choose **Apply** or **Cancel**.

Sometimes you will be entering information into a separate pop-up box which will say **OK** at the bottom. After the pop-up box closes, remember you will still need to click **Apply** on the main tab to complete your entry.

Names and Descriptions

Each element of Virtual Receptionist (schedules, menus, announcements, extensions) has a Name and Description, that you will be prompted to enter in a pop-up that appears once any Add New button is chosen

Names and Descriptions can be changed or edited at any time. Any links between menus will be automatically updated when you make a change.

- Name can be up to 40 characters long, and must be unique. It's a good idea to choose a very specific name that reminds you what that menu is used for.
- Description can be up to 256 characters long.
- Remember, you always have to choose **Apply** after you assign or change a Name or Description.
- Select and hover over any item in Virtual Receptionist to show a tooltip of its Name or Description.

Error and Warning Icons

As you're setting up Virtual Receptionist, you may encounter these icons along with a message alerting you to incorrect or missing information. You may also be warned not to turn on Virtual Receptionist, and in some cases you won't be able to do so until your configuration is correct.

- The Main tab has a Service Status panel that states your current schedule period and the menu that callers will hear. It also reports if you have errors in any menus, or one or more announcements is missing audio.
- The Schedule and Menus pages use a banner line to report any errors.

Virtual Receptionist Main Page

- Open the Call Manager portal
- Get acquainted with the Virtual Receptionist main page

Once your Users are set up:


- Click **Your Services** in the top menu bar, then pull down and select **Call Manager**.


This will open up the Call Manager Home Page, which is the administrative portal you use to access Virtual Receptionist.


- Click the Virtual Receptionist icon 


Take a moment to locate these sections:


- 1 A list of all the phone lines associated with your account. The number currently being viewed is highlighted in the list, and shown in bold at the left.
- 2 The Virtual Receptionist Main screen.
- 3 Activation/Service Status tells you if Virtual Receptionist is currently on or off, and shows any warning messages.
- 4 Navigation Links to Virtual Receptionist features. You can use either the row of tabs at the top or click on these easy-to-use icons.

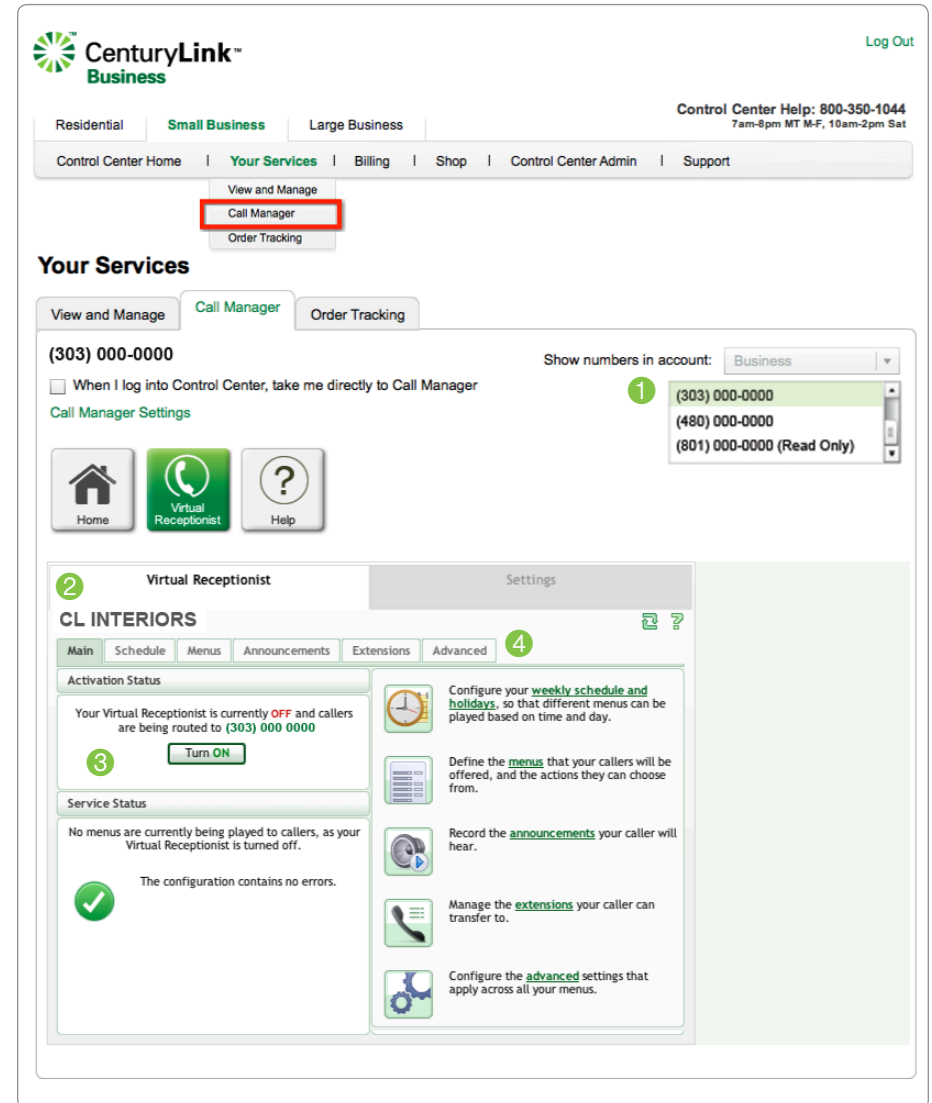
 **Schedule**, where you set up and configure daily, weekly, holiday times for your business.

 **Menus** defines what options your callers will be offered and the actions they can choose from.

 **Announcements** lets you record the greetings your callers will hear, or upload a sound file of your own.

 **Extensions** manages your internal phone numbers that callers can be transferred to.

 **Advanced** configures global settings that apply across all your menus.



CenturyLink[™] Business

Residential | **Small Business** | Large Business

Control Center Home | **Your Services** | Billing | Shop | Control Center Admin | Support

View and Manage
Call Manager
Order Tracking

Your Services

View and Manage | **Call Manager** | Order Tracking

(303) 000-0000

Show numbers in account: Business

When I log into Control Center, take me directly to Call Manager

Call Manager Settings

Home | Virtual Receptionist | Help

Virtual Receptionist Settings

CL INTERIORS

Main | Schedule | Menus | Announcements | Extensions | **Advanced**

Activation Status

Your Virtual Receptionist is currently **OFF** and callers are being routed to **(303) 000 0000**

Turn ON

Service Status

No menus are currently being played to callers, as your Virtual Receptionist is turned off.

The configuration contains no errors.

Configure your **weekly schedule and holidays**, so that different menus can be played based on time and day.

Define the **menus** that your callers will be offered, and the actions they can choose from.

Record the **announcements** your caller will hear.

Manage the **extensions** your caller can transfer to.

Configure the **advanced** settings that apply across all your menus.

Virtual Receptionist On/Off

- Turning your system On and Off
- Forwarding Calls when the system is Off

The first time you login to Virtual Receptionist, your service will be turned OFF until you complete your setup and turn it ON. At any other time, you can turn Virtual Receptionist off and on whenever you would like.

When Virtual Receptionist is turned off, callers will either be played an announcement telling them that the number is unreachable, or they can be forwarded to a number of your choice.

Although many users choose to leave Virtual Receptionist turned on all the time, you may prefer, for example, to turn off Virtual Receptionist during the day and forward your callers directly to a live receptionist instead. It's all up to you – the system is completely flexible.

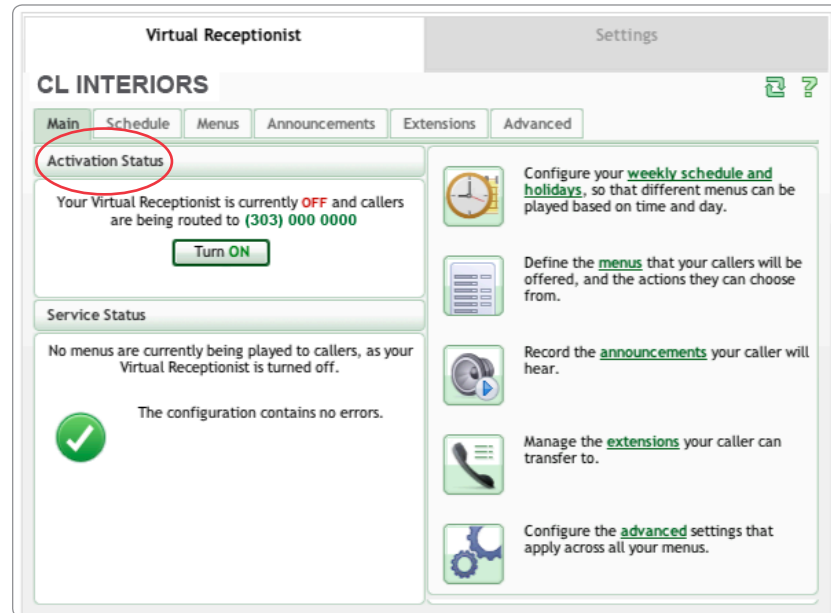
How to turn Virtual Receptionist on/off

- On the Main Page, locate the Activation Status section. You will see a message that indicates the current status of your system.
- Click on the button that will be labeled either **Turn ON** or **Turn OFF** (depending on the current status).

How to Forward calls when Virtual Receptionist is off

By default, when Virtual Receptionist is turned off, callers will hear a message that says your number is unreachable. If you would like callers to be forwarded to an alternate number instead, such as a Voice Mail mailbox or a live receptionist:

- Virtual Receptionist must be turned off.
- Your status will read either “Your Virtual Receptionist is currently OFF and callers will be told that this number is unreachable” or “Your Virtual Receptionist is currently OFF and callers are being forwarded to < number >.”
- Click on the link in the status message to enter a forwarding phone number or change the current one.





Schedule

- Set up schedule periods to govern what menus callers will hear

Virtual Receptionist allows you to offer your callers different menus depending upon the time of day or day of the week that they are calling.


You can establish up to 8 different schedule periods, and each of those periods can have a different menu played for callers. For example, you might create one schedule for your normal business hours, another schedule to cover the lunch period and an out-of-hours schedule for when your business is closed.

To get started, either:

- start with the built-in schedule that you can fine tune (recommended)
- start with a blank schedule (use this option to offer callers the same menu all of the time)

Establish your Schedule Periods

- If this is the first time you have opened the Schedule tab, start with the built-in example (show on this page) or create your own with a blank schedule (shown on page 11).
- Click the **Add New Period** button at the bottom to add to your schedule, or the Rename button to change the name of any period.
- Configure the hours for each schedule period, for each day from Monday to Sunday. Click the paintbrush in the left column and color in the grid by clicking on the appropriate cells. You can change several cells at once by clicking and dragging. Each schedule period is shown in a different color.
- Each schedule must have an associated menu before you will be permitted to turn on Virtual Receptionist. If this is the first time you're setting up Virtual Receptionist, there will not be any menus available in the list yet. You'll be doing that on page 12.

At any other time, choose an existing menu from the dropdown box or click the Create New Menu  icon to add a one.

The Built-In Schedule

Virtual Receptionist Settings

CL INTERIORS

Main **Schedule** Menus Announcements Extensions Advanced

Periods

Lunch

During this period, use this menu: Call Mark

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
9 am	Red	Red	Red	Red	Red	Red	Red
10 am	Red	Red	Red	Red	Red	Red	Red
11 am	Red	Red	Red	Red	Red	Red	Red
12 pm	Green	Green	Green	Green	Green	Green	Green
1 pm	Green	Green	Green	Green	Green	Green	Green
2 pm	Red	Red	Red	Red	Red	Red	Red
3 pm	Red	Red	Red	Red	Red	Red	Red
4 pm	Red	Red	Red	Red	Red	Red	Red
5 pm	Red	Red	Red	Red	Red	Red	Red
6 pm	Red	Red	Red	Red	Red	Red	Red

Zoom In

Add New Period Rename Delete Apply Cancel




Schedule

- Set up schedule periods to govern what menu callers will hear

Establish your Schedule Periods, continued

If you select Create New Menu, you'll be prompted to enter a unique name and a description for the menu. You can only use this option if Virtual Receptionist is turned off. You will configure this menu and its announcements later in the set-up process.

- Once you have created them, schedules are shown in alphabetical order in the Periods column on the left.

If there are any errors or conflicts in any of these schedules, you will see  alongside the schedule name. Examine your schedules and fix the error or you won't be able to turn on Virtual Receptionist.

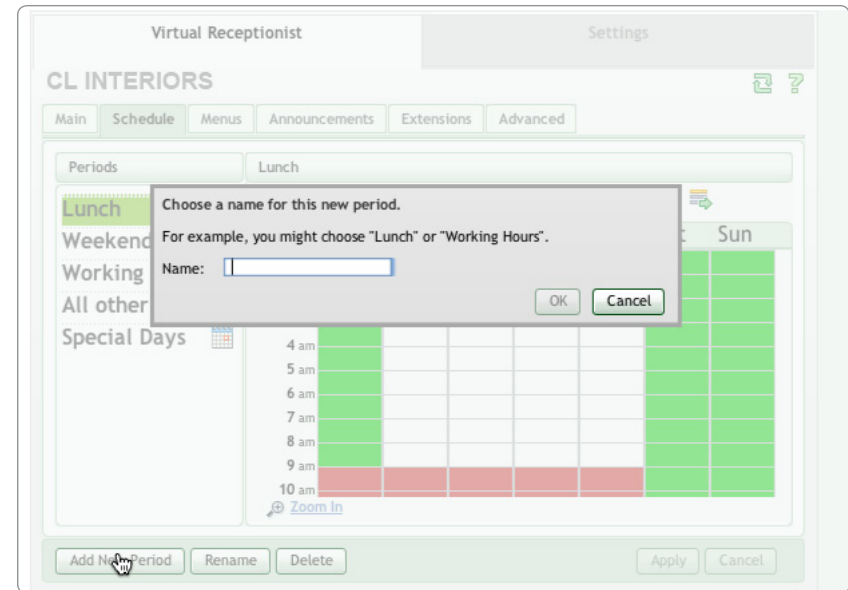
- **Once this schedule is complete, click Apply at the bottom.**
- Return to this screen at any time to make edits to your schedules, rename or delete them.

Preset All Other Times and Special Days Periods

- **All Other Times**, colored in white, is used at the times that are not defined in any of your other schedules.
- **Special Days** covers public holidays and other special one-off days when your business is closed. This schedule is always the last schedule in the list, and is colored in black.

Select this schedule and use the calendar to configure any specific one-off dates for your business. If you always close on public holidays, you can easily select all of the public holidays for your locale by clicking on the Add Public Holidays button.

- Be sure to choose **Apply** to save your changes.
- These two schedules cannot be deleted or renamed.



Starting with a Blank Schedule



Menus: About

- Set up, name and describe your Menu

Creating Menus

Virtual Receptionist allows you to create and configure up to 150 different menus to offer your callers. Each menu allows the following configuration:

- A name and description, to aid you in identifying the menu.
- An announcement, which tells callers which key presses are available.
- Actions for key presses, such as ringing a phone, playing an announcement or proceeding to another menu.

The following instructions describe how to set up and edit your Virtual Receptionist menus. You will need to repeat these steps for each menu that you create.

The list of existing menus will always be visible in the left-hand panel of the screen. Always make sure that you have the correct menu selected before making any changes.

About the Menu Tabs

Use the following tabs to set up and edit your Virtual Receptionist menus.

- 1 Use the **General** tab to add a new menu, or edit or delete a menu once you have selected it in the list on the left-hand side of the page.
- 2 Use the **Keys** tab to assign actions to the keys that a caller can press to navigate the menu.
- 3 Use the **Timeout** tab if you want to override the default timeout behavior for this menu only.
- 4 If you are editing or deleting an existing menu, use the **Reference** tab if you want to see if any other menus or periods make reference to this menu.

The screenshot displays the 'Virtual Receptionist' settings interface. At the top, there are tabs for 'Main', 'Schedule', 'Menu', 'Announcements', 'Extensions', and 'Advanced'. The 'Menu' tab is highlighted with a red circle. Below the tabs, there are four numbered callouts: 1 points to the 'General' sub-tab, 2 points to the 'Keys' sub-tab, 3 points to the 'Timeout' sub-tab, and 4 points to the 'References' sub-tab. The main content area is divided into two panels. The left panel contains a search bar labeled 'Search for...'. The right panel contains form fields for 'Name', 'Description', and 'Menu announcement'. At the bottom of the interface, there are buttons for 'Add New Menu', 'Delete', 'Apply', and 'Cancel', along with a note that says 'Long distance charges may apply'.



Menus: General

- Create, name and describe your Menus

Establish Menus

Use the General tab to configure the menus to be associated with different schedule periods. Existing menus are listed on the left-hand side of the screen, and an icon will be shown alongside any menus that have errors.

i The menu list can be up to 150 menus long. To find a specific menu more easily, use the Search box at the top of the left panel.

To add a New Menu

- Click the **Add New Menu** button at the bottom of the screen.
- You will then be prompted to enter a unique name and a description for this menu.
- Specify the menu announcement to be used for this menu using the dropdown box. You can either choose an existing menu announcement or opt to create a new one for this menu. You will record this announcement later in the setup process.
- Click the **Apply** button at the bottom.

To edit an existing menu

- Select the menu that you want to edit from the list on left.
- Change the name, description and/or announcement selection.
- Click the **Apply** button at the bottom.

To delete a menu

- Select the menu you want to delete, and click the **Delete** button below.
- You will see a pop-up asking for confirmation that you want to delete it.
- Click the **Apply** button at the bottom.
- If this menu is referenced by another menu or period, a pop-up will indicate which of your period(s) use this menu, and you won't be able to delete it if Virtual Receptionist is turned on. You will need to change the menu associated with these schedule period(s) before you can delete this menu.

The screenshot shows the 'Virtual Receptionist' settings window for 'CL INTERIORS'. The 'Menu' tab is selected, and the 'General' sub-tab is active. The 'Name' field is 'Call Mark', the 'Description' is 'Caller chooses to talk to Mark.', and the 'Menu announcement' is 'Press for Mark'. The 'General' sub-tab is circled in red. At the bottom, there are buttons for 'Add New Menu', 'Delete', 'Apply', and 'Cancel'. A note says 'Long distance charges may apply'.



Menus: Keys

- Specify the action that should happen when a caller selects a menu option

Set up Keys

- 1 From the list on the left, select the menu you want to set up key presses for.
- 2 From the dropdown box next to each key (1) through (*), choose from:

Use Default

The global default action for all keys on new menus, which is set using the Advanced tab (see page 23). If you select this option, the default value (for instance [Do Nothing](#)) will be shown to the right as a link. Clicking that link will take you to the Default keys page if you want to change the default action.

Transfer to Phone

Caller is transferred to a phone number of your choice. For example, you might want to allow callers to “press 4 to speak to a sales representative” or “press 1 to make an appointment.” Enter the phone number you want to transfer to in the box that will appear to the right of the dropdown. Enter the phone number exactly as you would dial it from your phone, including any area code.

Dial by Extension

Gives the callers options to find the person they want to speak to, such as dial the number if you know it or spell the person’s name. Click the ? to set up Extensions and follow the instructions on page 22.

Go to Menu

Caller is transferred to another Virtual Receptionist menu. Select the menu you want from the dropdown box to the right or choose Create New Menu, entering a unique name and description for this menu in the pop-up that will appear. If you subsequently delete the menu associated with this key, the dropdown will say Select Menu and the key action will be marked with an error.

Return to Previous Menu

Returns the caller to the most recent previous menu. If there is no Previous Menu to return to, Virtual Receptionist will simply replay the current menu.

Replay Menu

Virtual Receptionist replays the current menu.

The screenshot shows the 'Virtual Receptionist' settings for 'CL INTERIORS'. The 'Keys' tab is active, displaying a table of key actions. A red circle highlights the 'Keys' tab, and a green circle highlights the dropdown for key '2'. The left sidebar shows menu options like 'Call Mark', 'Make Appointment', and 'Hear Office Hours'. The bottom of the interface has buttons for 'Add New Menu', 'Delete', 'Apply', and 'Cancel'.

Key	Action	Additional Info
1	Transfer to Phone	
2	Transfer to Phone	
3	Transfer to Phone	
4	Transfer to Phone	
5	Dial by Extension	?
6	Use Default	Do Nothing
7	Use Default	Do Nothing
8	Use Default	Do Nothing
9	Use Default	Do Nothing
0	Use Default	Do Nothing
#	Use Default	Replay Menu
*	Use Default	Return to Previous Menu



Menus: Keys

- Specify what you want to happen when a caller presses a key to choose a menu option

Set up Keys, continued

2 From the dropdown box next to each key 1 through *, continued:

Announcement - Return

Caller will hear an announcement and then be returned to the menu. From the dropdown that appears to the right, choose the announcement to use for this key, or create a new one.

Announcement Hang-up

Caller will hear an announcement and Virtual Receptionist will then hang up the call. From the dropdown that appears to the right, choose the announcement to use for this key, or create a new one.

Hang-up

Virtual Receptionist hangs up the call without playing an announcement.

Do Nothing

The caller will be told that the option is not recognized.

3 When you are done assigning actions to each key, make sure to click the **Apply** button at the bottom of the screen.

i After you have set up your menu configuration, you can change it at any time by reassigning keys or updating announcements. If you change the options that you offer to your callers, remember to re-record your opening announcement as well!



Menus: Timeout

- Set Timeout behavior for certain menus to override the master timeout settings

Timeout Options

Virtual Receptionist has a global Timeout setting that tells the entire system what to do if a certain amount of time passes without the caller making a choice. This master setting governs every menu. However, you may have a certain menu situation that doesn't work well with the default Timeout behavior. If so, you can override the master Timeout on a per-menu basis.

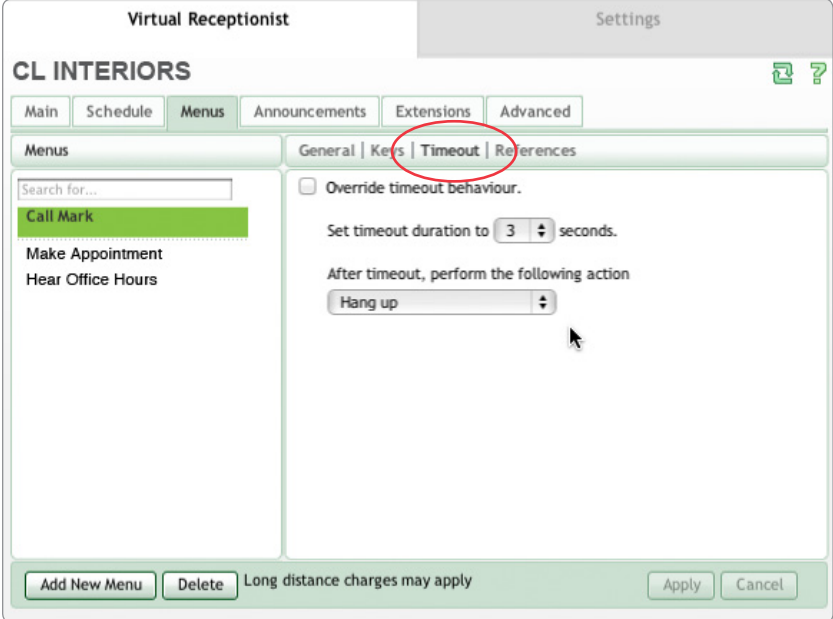
To override the master Timeout for a specific menu:

- Select the menu from the list on the left.
- Check the **Override timeout behavior** box.
- Set the new timeout duration. You can choose any value between 0 and 10 seconds.
- From the dropdown box, choose the action to be taken if a caller fails to press any key or make an entry during the specified time period.
- Click **Apply** to save your changes.

To turn off Override and resume using the master Timeout:

- Select the menu from the list on the left.
- Uncheck the **Override timeout behavior** box.
- Click **Apply**.

 **To review or reset the master Timeout behavior, visit the Advanced tab (see page 24).**



The screenshot shows the 'Virtual Receptionist' settings page for 'CL INTERIORS'. The 'Menu' tab is active, and the 'Timeout' sub-tab is selected and circled in red. On the left, a list of menus includes 'Call Mark', 'Make Appointment', and 'Hear Office Hours'. The 'Call Mark' menu is selected. On the right, the 'Timeout' settings are displayed. The 'Override timeout behaviour' checkbox is checked. The 'Set timeout duration to' is set to 3 seconds. The 'After timeout, perform the following action' dropdown is set to 'Hang up'. At the bottom, there are 'Add New Menu', 'Delete', 'Apply', and 'Cancel' buttons. A note at the bottom right says 'Long distance charges may apply'.



Menus: References


- See which menus are associated with other menus and scheduled periods

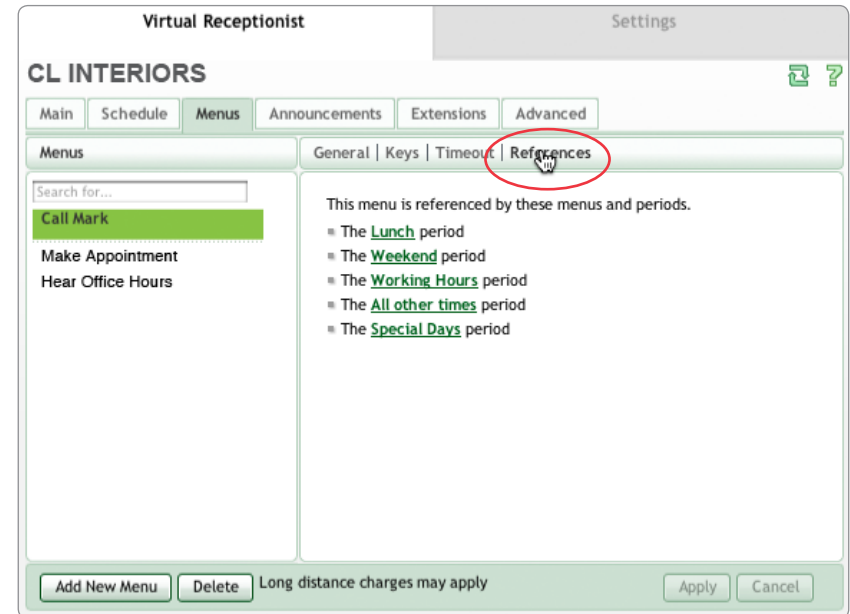
References

The References tab shows which menus and schedule periods make reference to the menu currently selected on the left-hand side.

To check if a menu is referred to by another menu or schedule:

- Select the menu you want to check the references for.
- You will then see a list of all the menus and schedule periods that use this menu. You can click on these links to go to these menus and schedules, for example if you want to change the menu that these reference.
- If there are no references, you will see the message "This menu is not referenced."

 **This feature is useful if you want to delete a menu, since menus that are referenced by other menus or schedule periods can't be deleted.**



The screenshot shows the 'Virtual Receptionist' interface for 'CL INTERIORS'. The 'Menu' tab is selected, and the 'References' sub-tab is active. The left sidebar lists menus: 'Call Mark', 'Make Appointment', and 'Hear Office Hours'. The main content area displays the following text: 'This menu is referenced by these menus and periods.' followed by a list of references: 'The Lunch period', 'The Weekend period', 'The Working Hours period', 'The All other times period', and 'The Special Days period'. The 'References' tab is circled in red. At the bottom, there are buttons for 'Add New Menu', 'Delete', 'Apply', and 'Cancel', along with a note: 'Long distance charges may apply'.



Announcements



- Create and record announcements to be used with your menus.

The Announcements tab lists the names of any announcements that you have already created when setting up your menu configuration, and uses icons to indicate the status of each one.




Since you can have up to 300 different Announcements, there is a Search box you can use to find the announcement(s) you want to work with, by typing in all or part of either the name or description, or using the recording ID number.

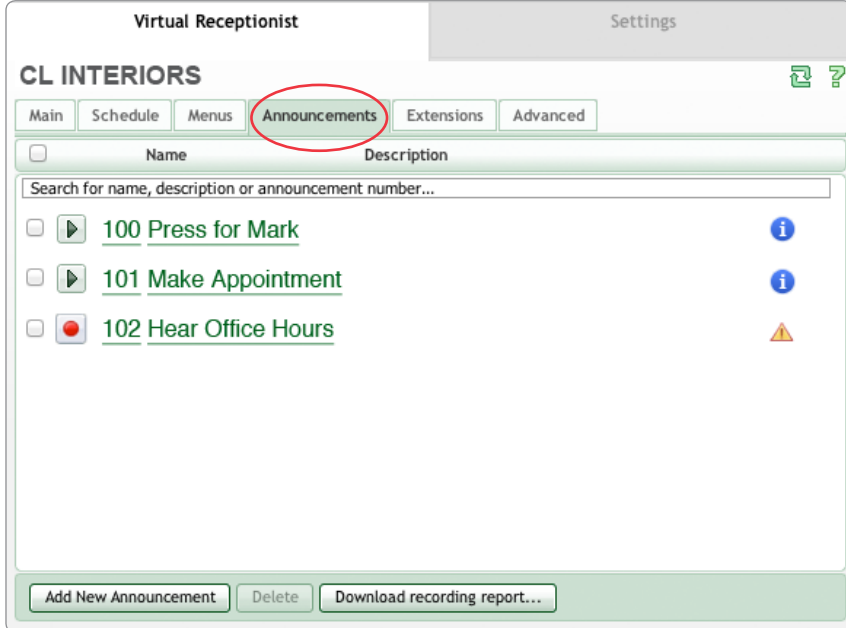
Note that the list of announcements contains only those for which the recording can be changed. There are also system announcements, for instance the announcement played when the user presses an invalid key, that cannot be changed.

The icons used to the left of the Announcement name are:

-  Indicates that a recording exists for this announcement. Clicking on the icon plays the announcement.
-  Indicates that a recording does not exist for this announcement.

The icons on the right side indicate the following states:

-  The announcement is referenced by one or more menus.
-  The announcement is not referenced by a menu.
-  The announcement is referenced by a menu but does not have a recording.









Virtual Receptionist Settings

CL INTERIORS

Main Schedule Menus **Announcements** Extensions Advanced

Name Description

Search for name, description or announcement number...

<input type="checkbox"/>		100 Press for Mark	
<input type="checkbox"/>		101 Make Appointment	
<input type="checkbox"/>		102 Hear Office Hours	

Add New Announcement Delete Download recording report...



Announcements




- Create and record announcements to be used with your menus.

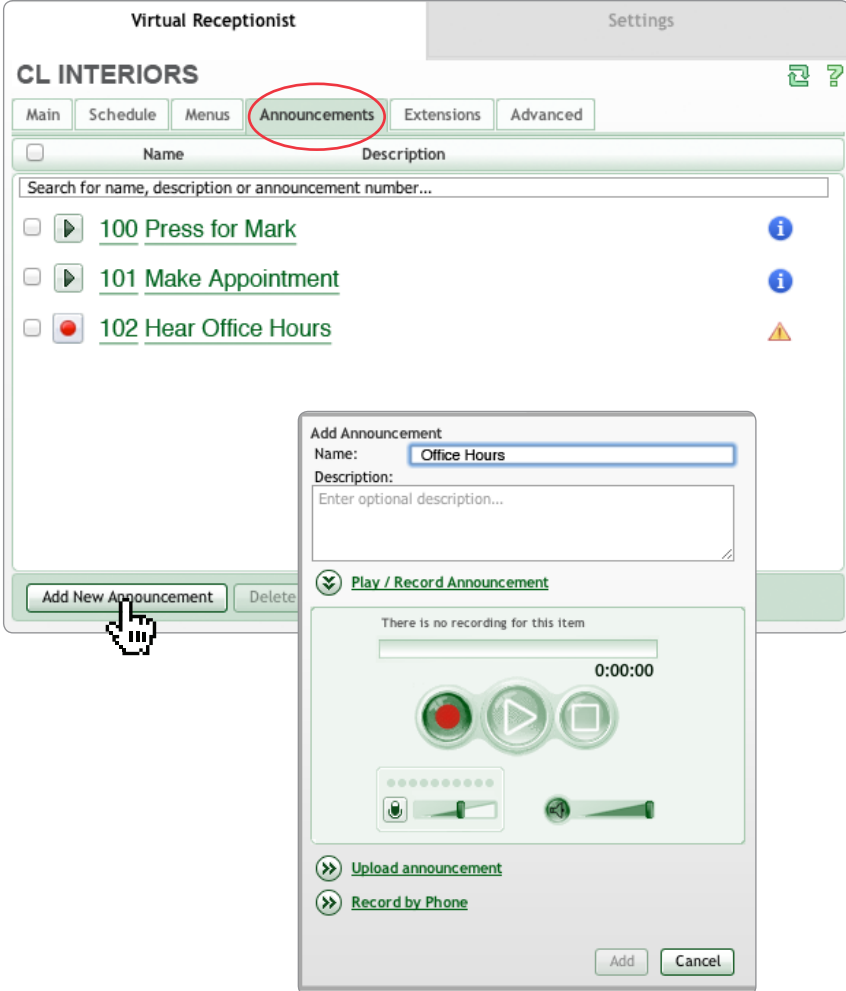
To Create a New Announcement

- From the Announcements page, click on **Add New Announcement** button.
- Enter a unique name and description in the pop-up that will appear.
- This will also launch the **Play/Record** screen. You can go ahead and create your audio now, or return and do it later.
- Click Add to add your new Announcement to the list.

Creating the Audio for your Announcement: Record/Play Pop-Up

There are three ways you can record your announcement

- **Record/Play** lets you use the microphone on your computer, and listen to the announcement via your computer's speakers.
 - When you are ready to record your message, press the  button.
 - Read your message into your microphone, and when you have finished, press the  button.
 - Playback your message to check that it has recorded correctly by pressing the  button. If there is a problem with the recording, e.g. you cannot hear it, or it is very quiet, see the section on troubleshooting below.
 - If you are not happy with your message content, then record a new message by pressing the record button again. This will overwrite your previous message.
- **Upload an announcement** lets you Browse and upload a audio file from your computer. You will see a warning message if the file is not in a valid .wav format, no recording has been selected, the recording is too long or the file is too big.
- **Record by phone** provides brief information on how to use the self-care telephone user interface to add audio to this announcement.











The screenshot displays the 'Virtual Receptionist' software interface. The main window is titled 'CL INTERIORS' and has a navigation menu with tabs for 'Main', 'Schedule', 'Menus', 'Announcements', 'Extensions', and 'Advanced'. The 'Announcements' tab is selected and circled in red. Below the navigation menu is a table with columns for 'Name' and 'Description'. The table contains three entries: '100 Press for Mark', '101 Make Appointment', and '102 Hear Office Hours'. Each entry has a checkbox, a play button icon, and an information icon. At the bottom of the main window, there is an 'Add New Announcement' button and a 'Delete' button. A mouse cursor is pointing at the 'Add New Announcement' button. A pop-up window titled 'Add Announcement' is open over the main window. It has a 'Name' field with the value 'Office Hours' and a 'Description' field with the placeholder text 'Enter optional description...'. Below the fields, there is a 'Play / Record Announcement' button. The pop-up also displays a recording status 'There is no recording for this item' and a timer '0:00:00'. At the bottom of the pop-up, there are 'Upload announcement' and 'Record by Phone' buttons, and 'Add' and 'Cancel' buttons.



Announcements


- Create and record announcements to be used with your menus.


Recording Controls

-  Starts recording. This will overwrite any message you have previously recorded.
-  Plays back your recorded message. This action will be unavailable if you have not yet recorded a message.
-  Stops recording or playing the message.
-  This control allows you to adjust the gain of your microphone. While recording, the  lights above this control will show how loud the signal is from your microphone. If the gain is set correctly then several green lights should appear while you are recording. If only one or two appear, then the gain is set too low and your message will be too quiet. If red lights appear, then the gain is set too high and your message will be distorted.
-  This control allows you to adjust the playback volume. You can mute or un-mute playback by clicking the  or  icons, and adjust the slider to set a particular volume level.

When you first attempt to record a message, an Adobe Flash Player Settings overlay will appear. Make sure the Allow radio button is selected, and if you do not want to be shown these settings in the future, tick the Remember checkbox.


Recording messages directly from your computer

Anywhere you see  record you can click on the icon to bring up the announcement recording control. This allows you to record your message directly via your computer's microphone.

Once you have recorded a message, the icon will change to  listen/change. Clicking on this icon will again bring up the announcement recording control, which will enable you to play back, and if you want, overwrite your recording.

Recording messages using your telephone

If you want to record your initial greeting and announcements using a telephone:

- Follow the instructions above for setting up your Virtual Receptionist menu, but don't click on any of the  record icons that appear.
- Once you have configured your menu options, click Apply as usual to save your changes. You will be warned that you have not yet recorded an initial greeting, and if you have assigned any keys to "Play Announcement," you will also be warned that you have not recorded the announcements to play. Ignore this warning.
- Dial your Virtual Receptionist service access number from your telephone, and select the appropriate options from the menu you will hear. You will be given the opportunity to record your initial greeting, as well as the announcements for any "Play Announcement" keys you have set up.
- If you have not yet done so, return to your Menu setup (see page 14) and make sure you assign the this announcement to a key press before you turn on Virtual Receptionist.



Announcements

- Create and record announcements to be used with your menus.

To Delete an Announcement




- From the Announcement list, select the announcement you want to delete by ticking the checkbox to the left.
- Press **Delete**.
- You can use the checkbox in the title bar to select all the announcements if you want to delete them all. Note that if you tick the checkbox in the title bar, and then do a search to filter the announcements list and then press Delete, you will delete all the announcements and not just those shown.
- If you attempt to delete an announcement that is still referenced by a menu, you will see a warning pop-up asking you to confirm or cancel the operation.
- You cannot delete a menu announcement if this menu is used by any of your schedule periods. In this case, Virtual Receptionist will display a pop-up to indicate this and the selected announcement(s) will not be deleted.

Download Recording Report

Use the Download Recording Report button to generate a CSV format list of all your announcements that will show the number, name and description of each announcement, plus whether audio is present and whether it is referenced by an existing menu. This process may take several minutes if you have a large number of announcements


Troubleshooting

I've recorded my message, but when I play it back, I can't hear anything.

- Check that you actually recorded something. The length of the current recording is shown as in minutes and seconds, e.g. 0:01:35. If the time is much lower than expected, or 0:00:00, then try recording your message again.
- Check that playback is not muted, and that the volume is turned up. If playback is muted then the  icon will be displayed. Press this to un-mute the speaker. Adjust the volume with the volume slider.
- Try re-recording the message, and as you are recording, watch the  lights above the gain control . If no lights appear, or only one or two appear, then check the following:
 - Increase the gain of your microphone by moving the gain control to the right.
 - Click the microphone icon to the left of the gain control to bring up the "Adobe Flash Player Settings" and make sure that the Allow option is selected. Click on the microphone icon at the bottom of this settings box and check that the correct microphone is selected in the dropdown, and that the record volume is turned up.
 - If you are using an external microphone, check that it's plugged in correctly.
- If several green lights appear consistently while recording, it is likely that your message has recorded correctly, but the problem is occurring when playing it back. If you're using external speakers, check that they are plugged in correctly and turned on.

If none of the above solves the problem, the microphone may have been muted by the operating system (e.g. Windows). Refer to your operating system help for further information.

I have recorded my message, but when I try to play it back it is distorted.

This may be because your microphone gain is set too high. Reduce the gain by moving the gain control  to the left hand end.



Extensions

- Define names and extensions that may be dialed if your menu is set up for this option.

Dial by Extension is one of the options available when you're setting up your Menus and their associated key presses (see page 14). If you use this feature, you will need to set up the names and extensions that are offered. This will allow callers to:

- Dial by Extension
- Leave a Voicemail by Extension
- Dial by Name
- Leave a Voicemail by Name

To set up Extensions

- From the Extensions page, click the **Add Extension** button.
- Enter an **Extension Number** from 1 to 7 digits, for example 9, 32, 789, 123987. The number cannot be the same as any other extension number.
- Enter the **First and Last Names** of the person assigned to this Extension. Each name must have at least two dialable characters.
- Enter the **Telephone Number** the call is transferred to if this Extension is dialed.
- Record a **Spoken Name** to go with this Extension. This recording is played to callers to confirm their selection and also to distinguish between Extensions. For example, if there are 2 people named John, the caller will hear the full names of both and be able to choose between them. Refer to the Recording instructions on pages 19-21. If this particular line already has a recorded name for Business Voice Mail, Virtual Receptionist can use that same recording as the Spoken Name.
- Or, you can choose to **Upload Spoken Name** and choose a pre-recorded audio to use instead of recording a Spoken Name.
- Click the **Add** button to close the pop-up and complete your entry.

To edit or delete Extensions

- **Edit** an existing Extension, locate and click on the Extension Number or Name. If you have a long list of Extensions, use the Search box to find the one you want.
- **Delete** an Extension by selecting the checkbox next to it, then click the **Delete Selected** button at the bottom. To select all of the Extensions at once, click the checkbox beside the word Extension along the top bar.



The Advanced tab has 3 sections so you can further customize Virtual Receptionist.

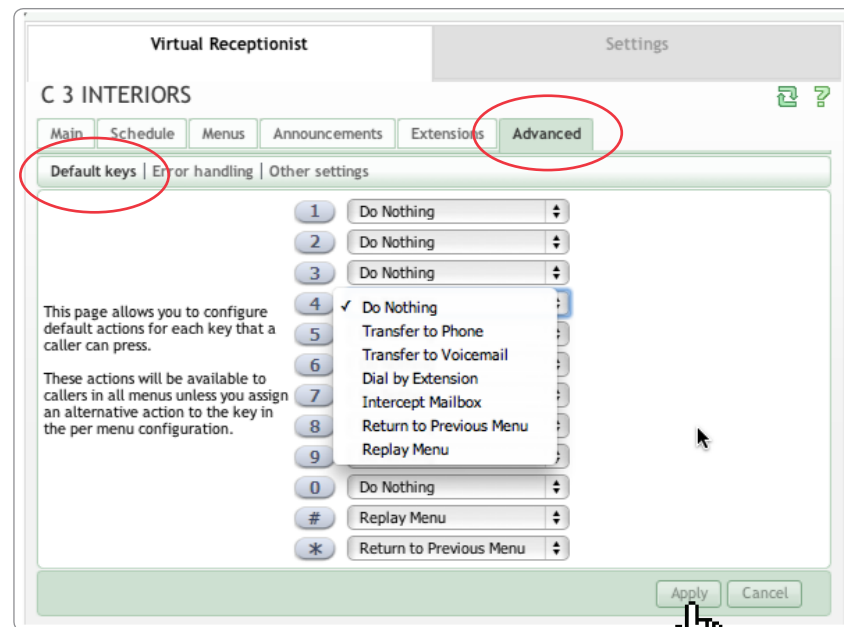
Default Keys

When you're setting up your Menus (pages 14-15), one of the key press options is called "Use Default." The preset default value for each number key is "Do Nothing." For (#), the preset is "Replay Menu" and for (*), the preset is "Return to Previous Menu."

If you would like to set a different default behavior for each key that will be available globally in all Virtual Receptionist menus, select one of the following from the drop-down box beside each key:

- **Do Nothing** – Nothing will happen when this key is pressed, and the caller will be told that the option is not recognized.
- **Transfer to Phone** – You will be prompted to add the 10-digit telephone number you want this key press transferred to.
- **Transfer to Voice Mail** – You will be prompted to enter the 10-digit mailbox number you want this key press directed to.
- **Dial by Extension** – Make sure to set up your Extensions once you finish setting up your key presses. See page 22.
- **Intercept Mailbox** – Transfers callers to the default voice mailbox. See page 25 to set the mailbox number.
- **Return to Previous Menu**
- **Replay Menu**

 **Make sure to click Apply once you've completed your selections.**



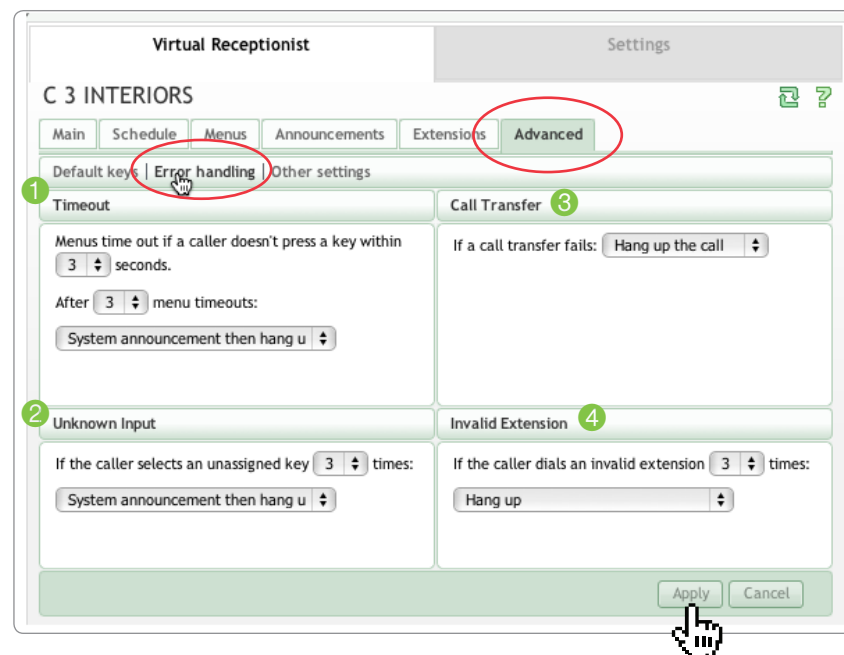


Error Handling

You can change the following global settings that determine what happens when there is an error while your callers are using Virtual Receptionist.

- 1 **Timeout Duration** defines what will happen if a caller fails to press a key.
 - Enter the time, from 0-10 seconds, within which a caller should press a key.
 - Enter the number of failures (up to 4) permitted. After each attempt, the caller will be told that the option is not recognized.
 - Using the dropdown box, select the action that will be taken once the caller has failed to press a key the specified number of times.
- 2 **Unknown Input** defines what will happen if a caller presses an unassigned key.
 - Enter the number of failures (up to 4) permitted. After each attempt, the caller will be told that the option is not recognized.
 - From the dropdown, select the action that will be taken take once the caller has pressed an invalid key a certain number of times. If you choose "Announcement - Hang up," you will be prompted to select the announcement that should be played.
- 3 **Call Transfer** defines what will happen if a transferred call doesn't go through.
 - From the dropdown, select the action in the event of a failed transfer. This will usually happen because the Extension that the person is trying to reach does not exist or has not been set up properly.
- 4 **Invalid Extension** defines what happens if a non-existent Extension is dialed.
 - Enter the number of failures (up to 4) permitted. After each attempt, the caller will be told that the option is not recognized.
 - From the dropdown, select the action that will be taken take once the caller has dialed invalid extension a certain number of times. An additional input box will appear if the action requires it, for example you will be prompted to enter a phone number if you select "Transfer to Phone."

Click Apply after you have changed any of the above actions.



Options available in the dropdowns are:

- System Announcement, then hang up**
- Transfer to Phone**
- Reply Current Menu**
- Announcement - Hang Up**
- Hang up**



Advanced

- Determine how to search for Extensions
- Set up the Intercept Mailbox number

Other Settings

Configure how you want callers to search for Extensions

From the dropdown box, choose one of the following:

- First and Last Name
- First Name
- Last Name

Set the number of your Intercept Voice Mailbox

- Enter the 10-digit number of the default voice mailbox that you want to have callers directed to.

Click Apply after you have made your selections.

Virtual Receptionist Settings

C 3 INTERIORS

Main Schedule Menus Announcements Extensions **Advanced**

Default keys | Error handling | **Other settings**

When a caller dials the name of an extension or mailbox they wish to transfer to, match against configured extensions based on:

The Intercept Mailbox action directs your callers to the voicemail account:

Apply Cancel

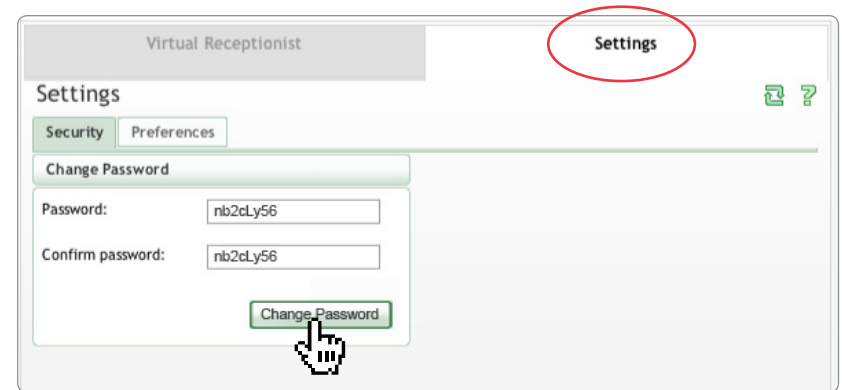


Settings

- Change your Password
- Change your System Name

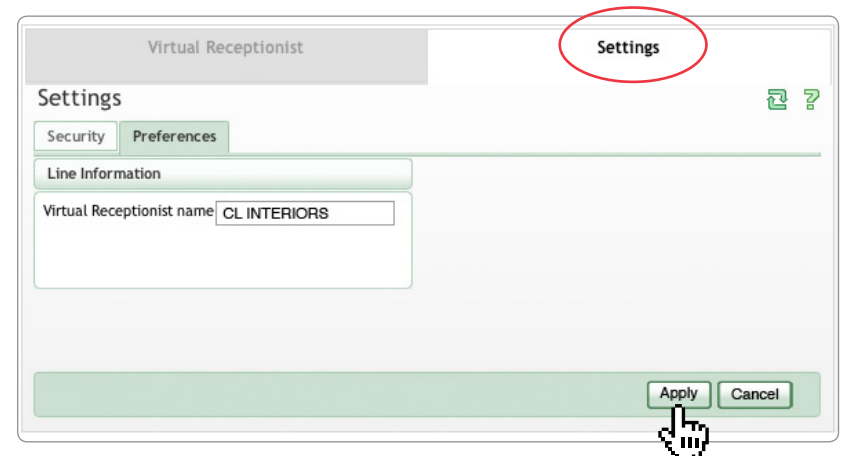
To change your Password

- From the Virtual Receptionist main page, click the **Settings** tab.
- Choose the **Security** tab.
- Enter the Password you would like to use, then enter it again to Confirm.
- Click **Change Password** when you're done.



To assign a Name to your Virtual Receptionist system

- From the Virtual Receptionist main page, click the **Settings** tab.
- Choose the **Preferences** tab.
- Enter the Name you would like to use. This name will appear at the top of each page of your Virtual Receptionist interface.
- Be sure to click **Apply** at the bottom to complete your entry.





General Troubleshooting

Can't login to Call Manager

- Make sure you are using your Small Business Control Center User ID and Password to log in to Call Manager.
- If you are an Individual User, your User ID and Password may not have been set up yet. Ask your business's Administrator for that information. See page 4.
- You must be using a computer with a compatible browser.
 - Internet Explorer 7.0 and above
 - Firefox 2.0 and above
 - Google Chrome 8.0 and above
 - Safari 4.0 and above
 - MSN Explorer 9.0 and above
- Your service may not be activated yet. Virtual Receptionist should be available between 7:00 p.m. and 11:00 p.m. on the next business day after your order is due.

Information is missing or isn't current

- Refresh your screen using the  Refresh button, or your browser's Refresh button.
- Log out and in again.

Can't hear recordings

- Make sure speakers are turned on, or headphones plugged in and volume is high enough to hear.

Information you've already entered seems to disappear

- After you enter information in a pop-up screen and choose "OK", remember, you still need to click the Apply button at the bottom of the Virtual Receptionist screen to complete each entry. See page 7.

**For more help with Virtual Receptionist,
call 1 800-247-7285**



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