

## Overview & How-To Setup

# Auto-Attendant

**Inbound Call Actions**

Select Action Type for +19522223366

☐ None ☐ Voice Mail ☒ Auto-Attendant  
☐ Queue ☐ Find-Me

Number of Rings before Answer: 3

Greeting (based on Infusionsoft lookup)

Lookup Success: Lookup Success Gree

Lookup Fail: Lookup Fail Greeting

Configure the Extensions

Number of Digits to be Entered: 3

Setup each 3 Digit Extension

Enter Extension:  ADD 101

Message: x101 - Sales

Goal Call Name: DialSalesGoal

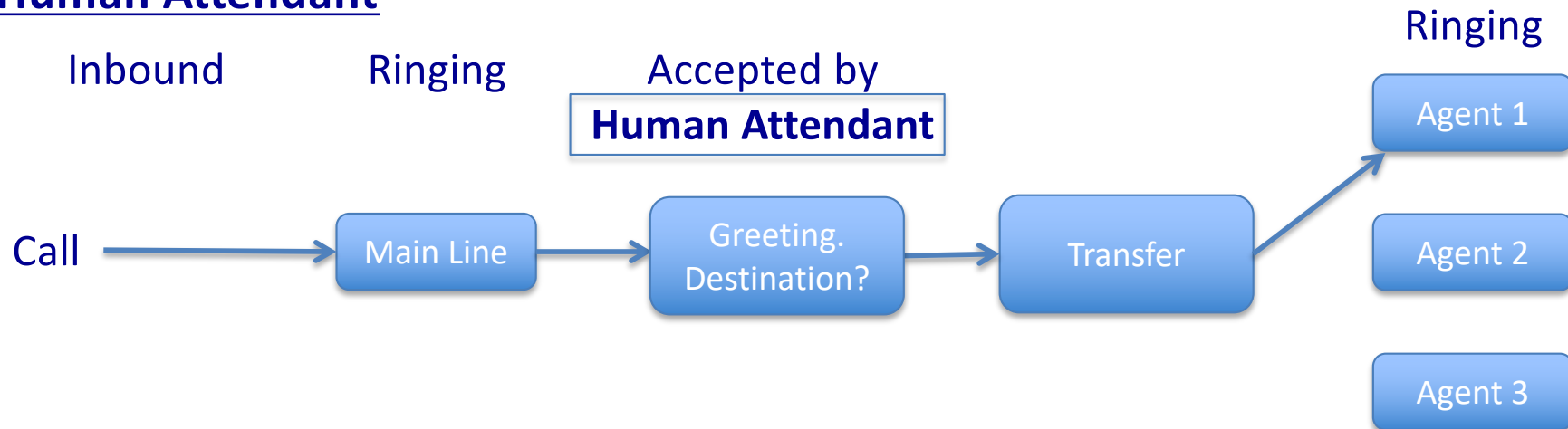
Transfer To #: +19522228422  
Must be a phone number.

Update

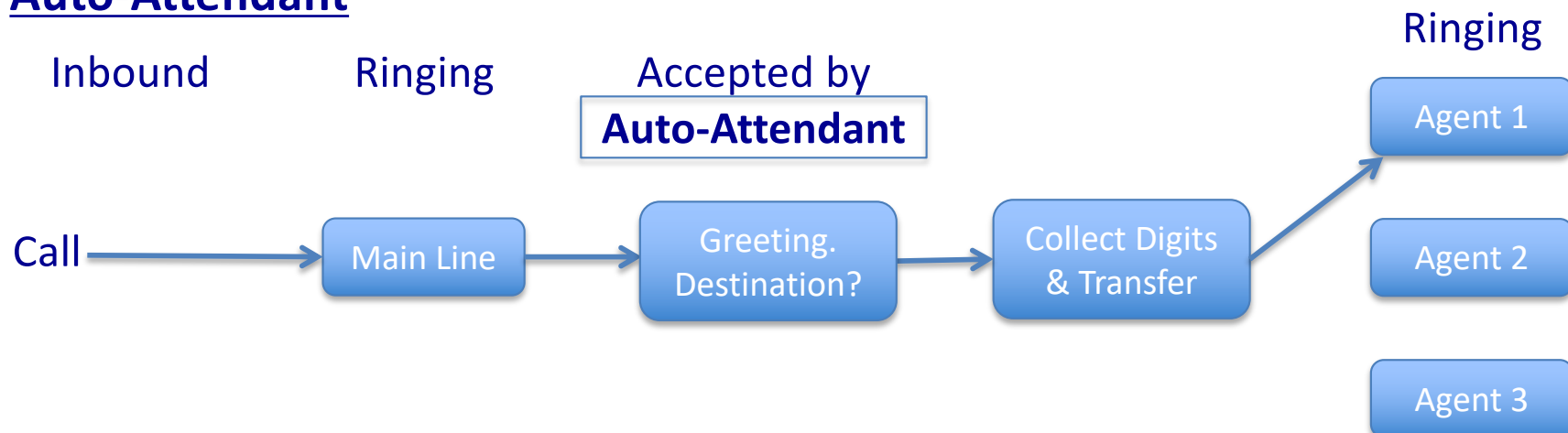
Close

# Auto-Attendant

## Human Attendant



## Auto-Attendant



# Auto-Attendant

Allow your inbound callers to autonomously choose and be connected to the people or resources they need

## Features

- Extensions can be 1-4 digits
- Caller lookup in Infusionsoft
- Different Greeting for known vs unknown callers

## Each Extension can...

- Play a pre-recorded message
- Transfer to a phone number
- Trigger an Infusionsoft Campaign Goal for known callers

- Available only for Inbound Numbers acquired in turboDial
- Upgrade to include Add-Ons in your account at <https://sd123.customerhub.net>

# Setup Overview

## Must be a turboDial Account Owner

- Compose your Call Arrival Greetings with Instructions to Callers
- Decide the Extensions you will configure on the Inbound Number
- Compose your digit input acknowledgement Messages
- Configure the Inbound Number for Auto-Attendant
- Create Auto-Attendant Dashboard Reports

Inbound Call Actions

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☐ Voice Mail
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Number of Rings before Answer:

3

Greeting (based on Infusionsoft lookup)

Lookup Success:

Lookup Success Gree

Lookup Fail:

Lookup Fail Greeting

Configure the Extensions

Number of Digits to be Entered:

3

Setup each 3 Digit Extension

Enter Extension

101

101 - Sales

esGoal

22228422

Inbound&SMS:

+15072370108...

Must be a phone number.

Update

Close

# Compose your Greetings

- Unknown callers
  - Greeting might include options for sales
- Known callers
  - Greeting might include options for support, or pre-recorded product information
- The same recording can be used for both Greetings
- Type-up these Greetings and refine the wording for clarity, then read them when making the recordings

Inbound Call Actions

Select Action Type for +19522223366  
☐ None   ☐ Voice Mail   ☒ Auto-Attendant  
☐ Queue   ☐ Find-Me

Number of Rings before Answer:

Greeting (based on Infusionsoft lookup)  
 Lookup Success:   
 Lookup Fail:

Configure the Extensions  
 Number of Digits to be Entered:

Setup each 3 Digit Extension  
 Enter Extension:

Message:

Goal Call Name:

Transfer To #:   
Must be a phone number.

# Decide the Extensions

Choose 1-4 digits

- E.g: 101, 102, 103, 201, 202, 203

Each Extension must include at least one of the following:

- A pre-recorded message to play
  - Confirm the choice they made
  - Provide some audio information
- Or, a phone number to transfer the call to
  - Give your staff or departments their own “extension” off your main line
- Or, an Infusionsoft API Goal to trigger when the caller is known
  - Send Email
  - Assign a Task
  - Apply Tags, etc.
- All are optional, but at least one is required

### Inbound Call Actions

Select Action Type for +19522223366

☐ None
 ☐ Voice Mail
 ☒ Auto-Attendant
 ☐ Queue
 ☐ Find-Me

Number of Rings before Answer:

Greeting (based on Infusionsoft lookup)

Lookup Success:

Lookup Fail:

### Configure the Extensions

Number of Digits to be Entered:

Setup each 3 Digit Extension

Enter Extension:

Message:

Goal Call Name:

Transfer To #:

Must be a phone number.

## Compose Messages for each Extension

## Examples:

- For transferring to a number
  - “You’ll now be connected to Sheldon Cooper”
- For requesting information
  - “Our offices are open Monday through Friday from ...”
- Type-up these messages and refine the wording for clarity, then read them when making the recordings

## Inbound Call Actions

Select Action Type for +19522223366

☐ None ☐ Voice Mail ☒ Auto-Attendant

☐ Queue ☐ Find-Me

Number of Rings before Answer: 3

Greeting (based on Infusionsoft lookup)

Lookup Success: Lookup Success Greeting

Lookup Fail: Lookup Fail Greeting

Configure the Extensions

Number of Digits to be Entered: 3

Setup each 3 Digit Extension

Enter Extension:  ADD

Message: x101 - Sales

Goal Call Name: DialSalesGoal

Transfer To #:

*Must be a phone number.*

Update

Close

# Configure Auto-Attendant

Must have turboDial Account Owner permissions:

1. Record your **Messages** and **Greetings** using the “Recorded Msg” section of the turboDial panel
  - A. Give each recording a helpful name
2. Choose and Configure an Inbound Number...
  - A. Move to screen 3: Inbound Call Actions
  - B. Choose “Auto-Attendant”
  - C. Choose number of rings ...
  - D. Choose recorded Greetings from step 1
  - E. Choose the number of digits to be dialed for an Extension, 1-4\*
  - F. For each Extension
    - a. Type it in and “Add” it
    - b. Set at least 1 field: Message, Goal Call Name, Transfer To number
    - c. Repeat step F for all Extensions
3. Click “Update” to set the configuration

\*0 is a special case

### Inbound Call Actions

Select Action Type for +19522223366

☐ None
 ☐ Voice Mail
 ☒ Auto-Attendant
 ☐ Queue
 ☐ Find-Me

Number of Rings before Answer:

**Greeting** (based on Infusionsoft lookup)

Lookup Success:

Lookup Fail:

---

Configure the Extensions

Number of Digits to be Entered:

Setup each 3 Digit Extension

Enter Extension:

**Message:**

Goal Call Name:

Transfer To #:   
Must be a phone number.



# Walk through a Setup & Demo

# Special Case: Greet then Transfer

## Purpose

1. Intercept an inbound call with an announcement to the caller, then...
2. Immediately transfer to the preset number – no extension input

## Setup

- Set “Number of Digits to be Entered” to 0
- Provide Greetings for Lookup Success and Fail
- Click Update

**Inbound Call Actions**

Select Action Type for +19522223366  
☐ None   ☐ Voice Mail   ☒ Auto-Attendant  
☐ Queue   ☐ Find-Me

Number of Rings before Answer:

Greeting (based on Infusionsoft lookup)

Lookup Success:

Lookup Fail:

Configure the Extensions

Number of Digits to be Entered:

**GREET THEN FORWARD**  
 If Number of Digits is 0 then no digits will be collected from the caller. The Lookup Success or Fail Greeting will be played and the call will be forwarded to the Number provided below.

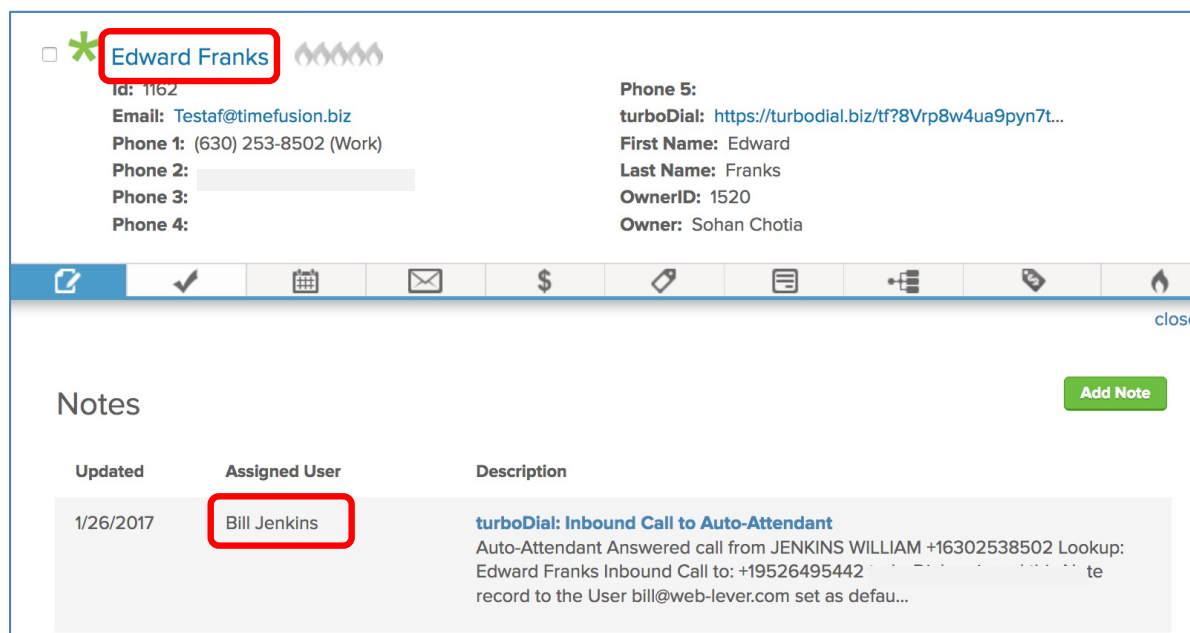
Goal Call Name:

Transfer To #:   
Must be a phone number.

☒

# Auto-Attendant Note Records

- Attached to the Contact found for the phone number
  - Or remains unattached if no Contact found



The screenshot displays the TurboDial interface. At the top, a contact card for "Edward Franks" is shown with a red box around the name. Below the name, contact details are listed: Id: 1162, Email: Testaf@timefusion.biz, Phone 1: (630) 253-8502 (Work), and Phone 2 through 4. To the right, additional details are provided: Phone 5, turboDial URL, First Name: Edward, Last Name: Franks, OwnerID: 1520, and Owner: Sohan Chotia. Below the contact card is a toolbar with various icons. Underneath the toolbar is a "Notes" section with a table. The table has three columns: "Updated", "Assigned User", and "Description". A single row is visible with "1/26/2017" in the "Updated" column, "Bill Jenkins" in the "Assigned User" column (highlighted with a red box), and a detailed description of an inbound call in the "Description" column. A green "Add Note" button is located to the right of the table.

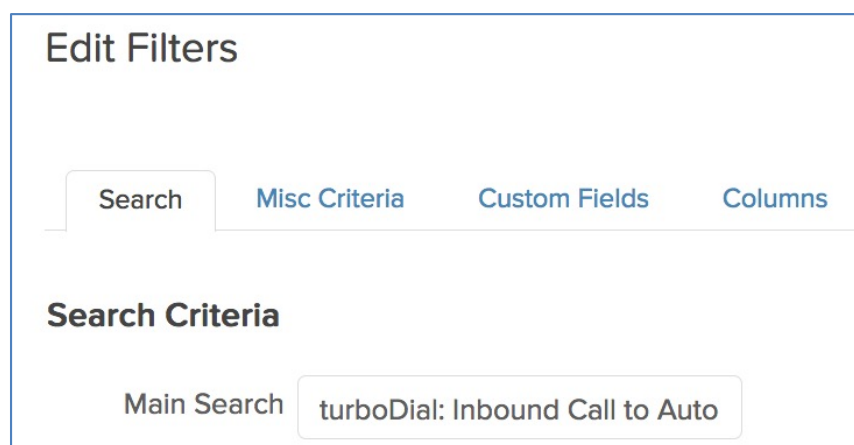
Updated	Assigned User	Description
1/26/2017	Bill Jenkins	turboDial: Inbound Call to Auto-Attendant Auto-Attendant Answered call from JENKINS WILLIAM +16302538502 Lookup: Edward Franks Inbound Call to: +19526495442 ... te record to the User bill@web-lever.com set as defau...

- If the Inbound Number has an “Assigned User” the Note Record will be assigned to that User
  - Otherwise, it will be unassigned
  - User assignment is on the first screen for modifying the configuration of the number

# Dashboard Reports

- Open the Admin->Reports window in Infusionsoft

- Create and Edit a Task-Note Report

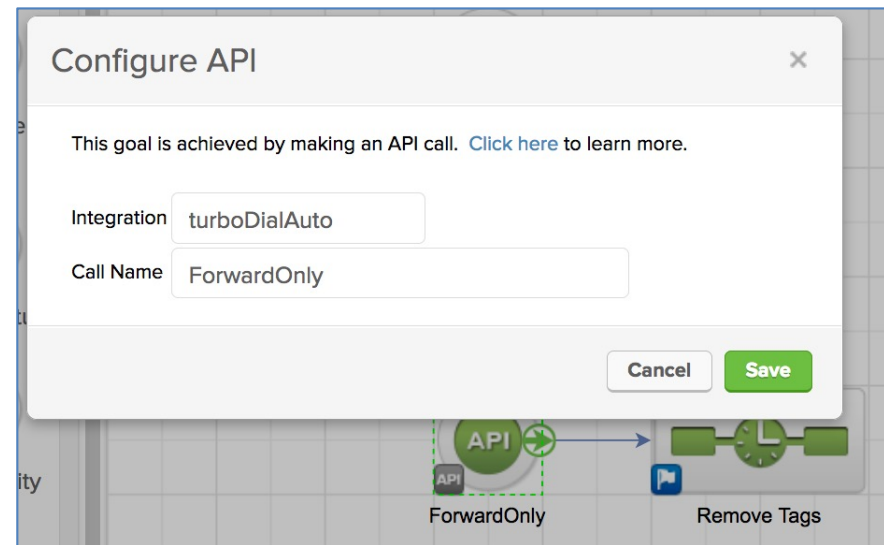


- Set Main Search = **turboDial: Inbound Call to Auto-Attendant**
- Adjust the other filters as needed
- Save the Report and choose “Add to User Home...”

# Campaign Goal Triggers

- API Goals configured in your Infusionsoft Campaigns can be triggered by callers
  - If the caller was found in your Infusionsoft account, and
  - When the caller chooses an Extension you've configured with a Call Name
- Setup the API Goal "Integration" and "Call Name" fields
  - Integration: "turboDialAuto"
  - Call Name: Specified by you for each Extension

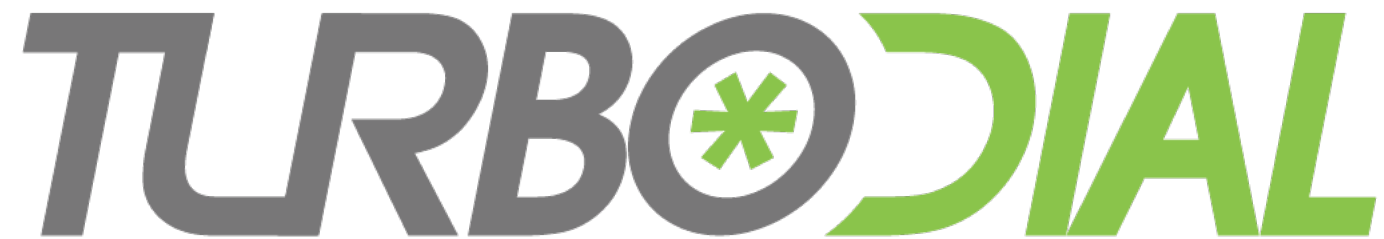
(note that capitalization is critical)



- Example: "Press 5 if you'd like to receive an email with our Insider Specials for October"
  - When they press 5 your campaign will automatically send the email

# Items to Note

- A 'Transfer To' destination must be any valid phone number
  - It can be a turboDial Inbound Number that transfers to a turboDial softphone address
- The 'Transfer To' destination cannot be a softphone address; only phone numbers are allowed (but see previous item).
- The choice for Number of Digits to be Entered cannot be modified if any Extensions are configured.
  - To change the “Number of Digits to be Entered” delete all Extensions first
- The “0” Extension is always included and cannot be deleted.
  - You must configure it for callers who use the “0” digit when they are confused
  - You are not required to mention it in the greeting
- You cannot modify a Recorded Msg in use by an Auto-Attendant. Remove it from the Auto-Attendant configuration before modifying/deleting.
- If Caller enters an invalid option the greeting is replayed and the Caller can retry
  - Entering an invalid option 4 times is treated as if the the “0” option was entered



## Auto-Attendant

- Available only for Inbound Numbers acquired in turboDial
- Upgrade to include Add-Ons in your account at <https://sd123.customerhub.net>