



**SmartVoice**

# **Auto-Attendant User Guide**

**Shaw)** Business

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# Steps to setup an Auto-Attendant

The Auto-Attendant serves as an automated receptionist that answers the phone call and provides a personalized message to callers. It can be configured to provide callers with the option to connect to the operator, dial by name or extension, leave a message, listen to a greeting, or connect to configurable destinations.

**Note:** VoIP phone emergency 9-1-1 features differ from traditional 9-1-1 services.

Visit <https://business.shaw.ca/smartvoice911> for more information.

## Steps

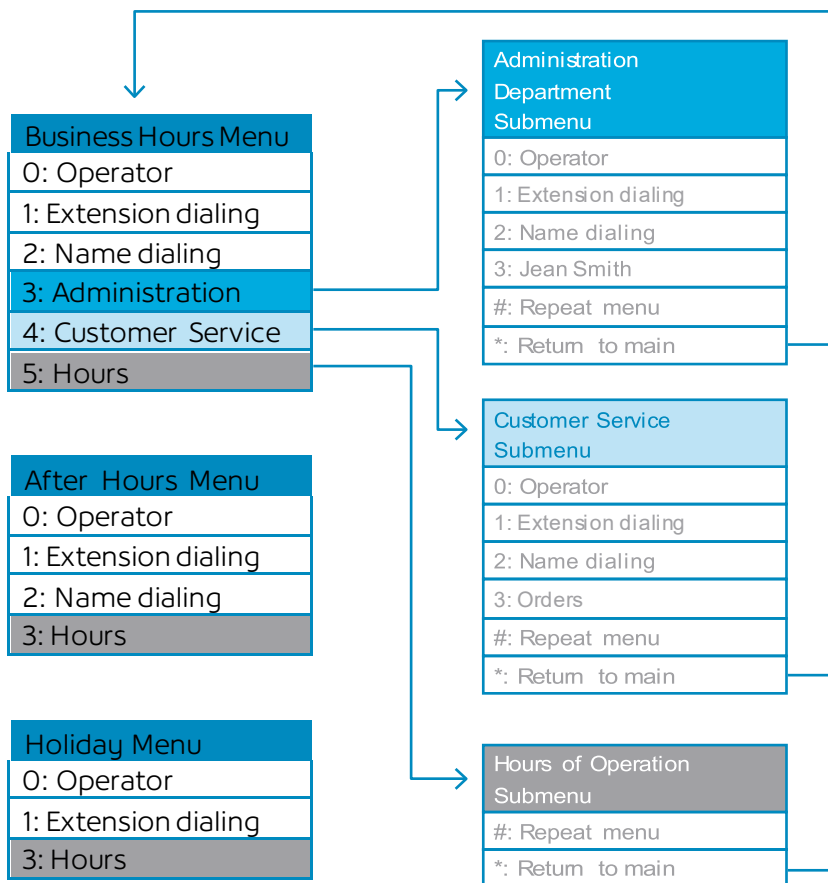
- Plan your Auto-Attendant structure
- Prepare Custom Greetings for each Menu and Sub-menu
- Configure Time and Holiday Schedules for your organization
- Set up the Menus and Submenus
- Call the Auto Attendant numbers to test your design

# Plan your Auto-Attendant

## Map out the structure

Map out the structure of the Menus (Business Hours, After Hours and Holiday) and Submenus.

Here is a sample Auto-Attendant structure:



## Notes

- Extension dialing can be enabled in each Menu and Submenu to allow the user to dial an extension without having to select an option first.
- There are controls for the scope of extension and name dialing to determine whether calls can be directed to users in the same group, department, or enterprise.

# Prepare Custom Greetings

## Customer Greeting examples

Custom greetings that include each key defined in the menu are needed to be voiced to the caller. They can be recorded using the End User Portal web interface or pre-recorded in an audio file.

## Note:

- If Custom greetings are not defined for each Menu and Submenu, the system will play default greetings

that may not be related to the options in the Auto-attendant menus and submenus.

**Tips:**

- List Menu options in a predictable order.
- List menu options that transfer to the operator last (To reach the operator, press 0 or stay on the line).

## Define custom greeting contents

For the sample menu the following custom greetings will be required:

- Welcome to ABC Distributing.
- If you know the extension of the party you are trying to reach, dial it now.
- To use our automated name directory, press 2.
- To reach the Administration department, press 3.
- To reach Customer Service, press 4.
- For our regular Business Hours, press 5.
- To reach the operator, press 0, or stay on the line.

## After Hours Menu Greeting

- “Welcome to ABC Distributing. Our offices are now closed.
- To reach an extension, dial 1.
- To use our automated name directory, press 2.
- For our regular business hours, press 3.
- Thank you for calling”.

## Holiday Menu Greeting

- “Welcome to ABC Distributing. Our offices are closed for holidays.
- To reach an extension, dial 1.
- For our regular business hours, press 3.
- Thank you for calling”.

## Administration Department Submenu Greeting

- “You have reached the administration department of ABC Distributing.
- If you know the extension of the party you are trying to reach, dial it now.
- To use our automated name directory, press 2.
- To reach Jean Smith, press 3.
- To repeat this menu, press the pound key.
  - To go back to the previous menu, press the star key.
  - To reach the operator, press 0 or stay on the line”.

## Customer Service Submenu Greeting

- “You have reached the customer service department of ABC Distributing.
- To dial an extension, press 1.
- To use our automated name directory, press 2
- To place an Order, press 3.
- To repeat this menu, press the pound key.
- To go back to the previous menu, press the star key.
- To reach an operator, press 0 or stay on the line.”

## Hours of Operation Submenu Greeting

- “Our hours of operations are Monday to Friday from 9 AM to 4 PM
- To repeat this menu, press the pound key.
- To go back to the previous menu, press the star key.

# Uploading and Recording Greetings

There are multiple ways to manage greetings in the Auto-attendant.

- The End user portal is an on-line interface that allows customers to record or upload pre-recorded greetings
- The Voice portal is accessed through a phone and allows customers to record custom greetings

## Greetings for Menus and Submenus using the End User Portal

It is possible to record or upload pre-recorded greetings for the Business Hours, After Hours and Holiday menus by logging into the End User portal using Group Administrator credentials.

- Note: About Pre-recorded audio files:
  - Most common audio file extensions supported (wav, mp3, etc)
  - Audio recorded for less than 10 min 40 sec
  - Total amount of all pre-recorded greetings cannot exceed 1GB
- Recording announcements is done using your PC microphone

Steps to Upload or Record the Custom greetings can be found in the announcement repository section

To access the SmartVoice Call Queuing settings, login to the SmartVoice Portal found at [smartvoice.shawbusiness.ca](http://smartvoice.shawbusiness.ca)

Figure 1



## Greetings for Menus and Submenus using the voice portal

It is possible to record custom greetings for the Business Hours, After Hours and Holiday menus by calling the Voice Portal and logging in as the Group Voice Portal extension with the Voice Portal Administrator password.

Steps to record the Menu greeting using the Voice Portal can be found in the Voice Portal Section

### Tips:

- When messages are recorded through the Voice portal, they will show up in the Announcement repository and will be named with a time stamp (date/Time of the recording)
- Shaw recommends logging into the End user Portal and changing the name to something that is more manageable

# Announcement Repository

The announcement repository is a new feature in the End User Portal available to Group Administrators that provides a central location to manage all announcements. From this section customers can easily upload, record, delete or edit announcements and quickly see what announcements are assigned to what features/services.

Steps for applying Announcement to features can be found in the section SET UP THE MENUS AND SUBMENUS.

**Note:** As of April 2019, Shaw recommends customer use the Announcement Repository for management of all announcements

Existing announcements made or uploaded prior to April 2019 can be found and managed in the Service Announcement repository

## Group Services > Site Service > Auto Attendant > Announcements

\*Announcement recorded or uploaded here will not show up in the Group Announcement repository and will remain local to the Auto Attendant.

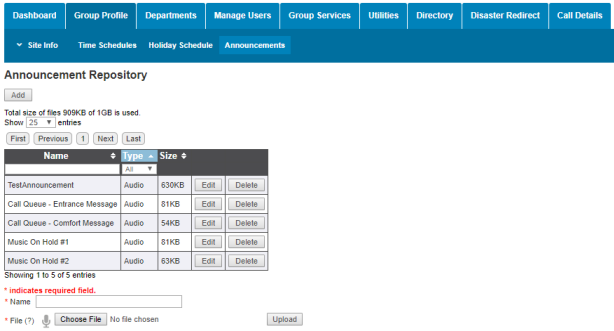
Shaw recommends re-recording all announcements into the **Group Announcement Repository - Group Profile > Announcements**

## Upload a Pre-recorded Greeting

The Group administrator user can perform this task in the End User Portal web interface:

## Group Profile -> Announcements

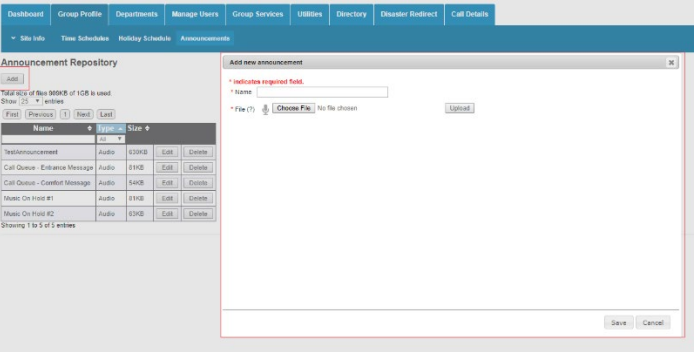
Figure 2



1. Click Add  
A new window will open

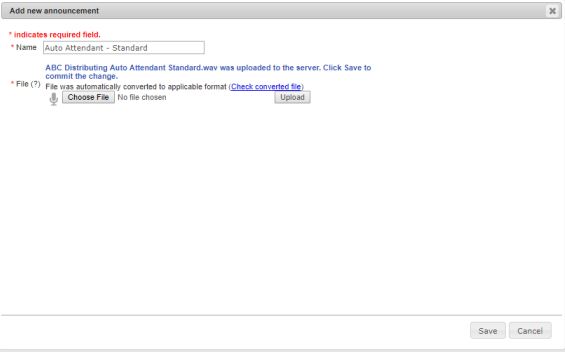


Figure3



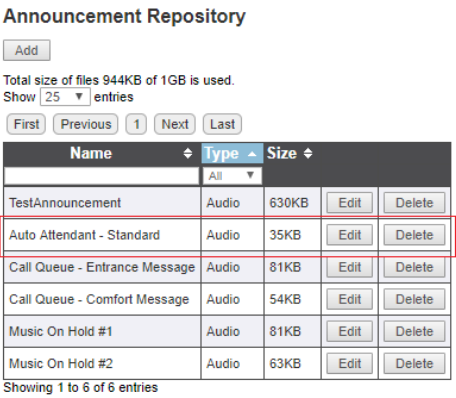
1. Name your new Announcement
2. Select “Choose File” and select the wav file you wish to use
3. Click upload – a message will confirm the upload was successful

Figure4



4. Click save
- Your announcement will now show up in the Announcement repository

Figure5

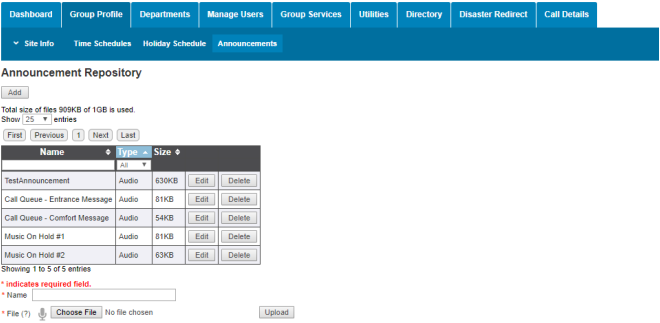


## Recording A Greeting

The Group administrator user can perform this task in the End User Portal web interface:

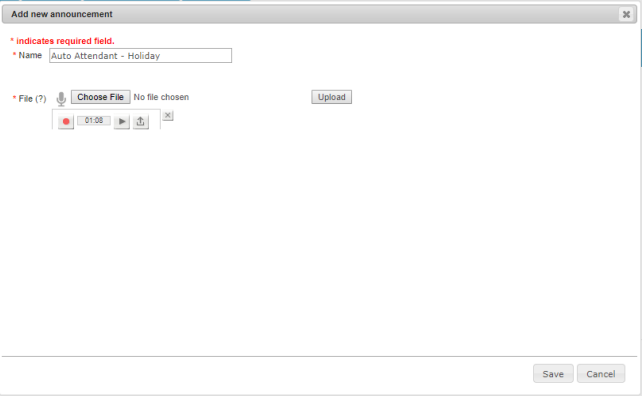
### Group Profile -> Announcements

Figure 6



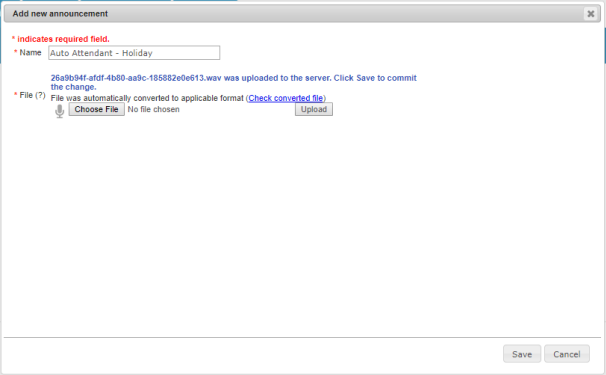
1. Click Add  
A new window will open
2. Name your new Announcement
3. Select the microphone
4. Select the Record icon to start recording and again to stop recording
5. Recording will be done through your PC microphone or auxiliary device if available

Figure 7



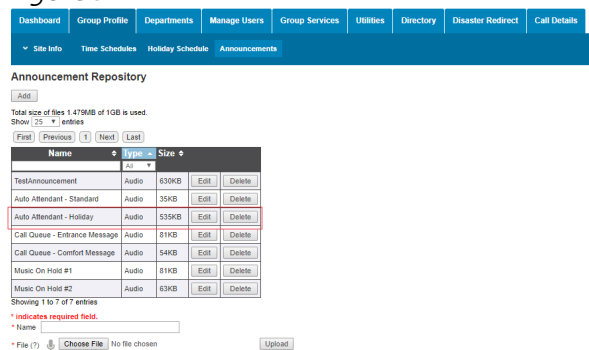
6. Click upload – a message will confirm the upload was successful

Figure 8



7. Click save
8. Your announcement will now show up in the Announcement repository

Figure 9



# Voice Portal

## How to record custom announcements

Follow these steps to record custom announcements for the Business Hours, After Hours and Holiday menus of any Auto Attendant in your group by calling the Voice Portal:

### Note:

- To use this method the Group Voice Portal extension and the Group Voice Portal Administrator password are needed
- Log in to the Voice Portal as the administrator from any phone that does not have Voice Messaging Auto login enabled:  
Press \*99 and then press the pound key (#)  
Press star key (\*)  
Enter the Group Voice Portal extension which is always **9999** followed by the pound key (#).  
Enter the Voice Portal Administrator password followed by the pound key (#). By default, the passcode is the main number of your business **without** the area code.

### Note:

Passcode can be changed in the group admin portal or as indicated below  
To change the administrator Voice portal password in the portal:  
Group Services>Site Services>Voice Portal>Change Administrator Passcode

- The Group voice portal announces the Administrator main menu:  
To change an Auto Attendant's greetings, press 1.  
To go to the Branding Configuration menu, press 2.  
To record a new Announcement, press 5.  
To change your passcode, press 8. (Administrator password)

To exit the voice portal, press 9.

To repeat this menu, press the pound key (#)

3. Press 1 to change an Auto Attendant's greetings
4. Enter the extension for the auto attendant, followed by the pound key (#). Only if there is more than one Auto-attendant in the group
5. Follow the prompts to change any of the Business Hours, After Hours or Holiday greetings:
  - To change the business hours greeting, press 1
  - To change the afterhours greeting, press 2
  - To change the holiday hours greeting, press 3
  - To go back to the previous menu, press (\*)
  - To repeat this menu, press the pound key (#)

**Note:**

Greetings recorded through the phone will be recorded in the Announcement Repository as a Date Stamp. The group admin can change the name to something unique to help identify multiple recordings.

## Configure Time and Holiday Schedules for your Organization

Configure a Time Schedule for your organization's Business Hours and a Holiday Schedule for your organization's holidays.

**Note:**

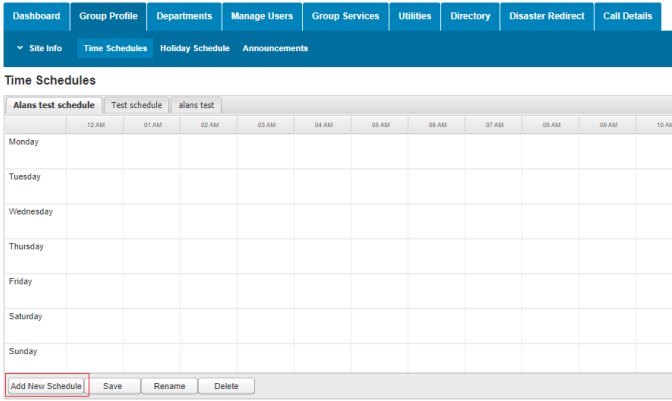
- The Group administrator can manage the Group Schedules in the End User Portal web interface. If you do not have a Group administrator this section will be completed by Shaw on your behalf.

### Add Time Schedule

The Group administrator user can perform this task in the End User Portal web interface:

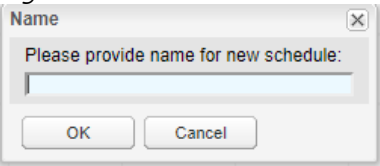
**Group Profile -> Time Schedules -> Add New Schedule**

Figure 10



1. Enter a name for the schedule in the text box of the Name window that appears:

Figure 11

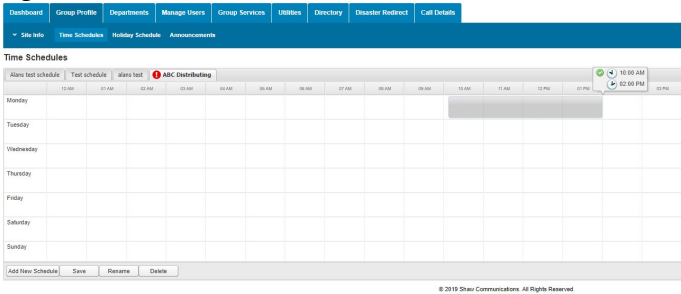


2. Click OK. This creates a schedule with no events
3. Select the tab of the created (or existing) schedule to display the week calendar:

Note:

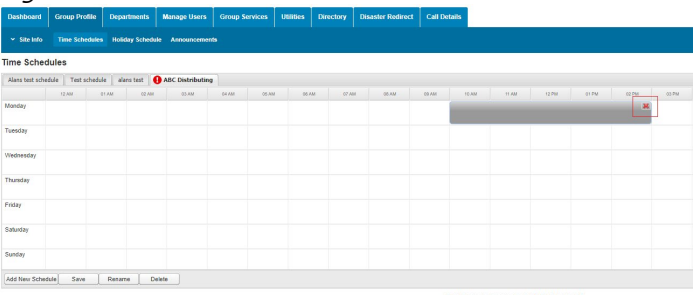
- An empty schedule, that is, a schedule with no events, is considered by the system as always applicable.
- To add an event, click and drag the mouse from the start time until the end time of the Business day for each weekday:

Figure 2



To remove an event, click on the red X at the top right corner of the event box:

Figure 13



- 4. Click on Save to save the changes in the Time schedule**

# Creating Holiday Schedules

## How to add Holidays Schedules

**The Group administrator user can perform this task in the End User Portal web interface:**

**Group Profile -> Holiday Schedule -> Add Holiday Schedule**

**Figure 3**

Dashboard
Group Profile
Departments
Manage Users
Group Services
Utilities
Directory
Disaster Redirect
Call Details

▼ Site Info
Time Schedules
**Holiday Schedule**
Announcements

### Holiday Schedules

Add Holiday Schedule

1. Click **Add Holiday Schedule**. The **Add Holiday Schedule** window appears
2. Enter the name for the Holiday schedule, the list of non-business days and click on **Save**:

**Figure 45**

[illegible]

# Configure Auto-Attendant Profile Options

Note:

- The Group administrator can manage the Menus and Submenus in the End User Portal web interface. If you do not have a Group administrator this section will be completed by Shaw on your behalf.

The menus are configured in the End User Portal web Interface by the Group administrator user.

**Group Services -> Site Services -> Auto Attendant -> Select: <Select Auto Attendant> -> Profile**

## Configure the Auto-Attendant profile options

Select the options for the Auto-Attendant:

Field	Description
Scope of Extension Dialing	Specify whether extension dialing applies across the Enterprise, Group or Department of the Auto Attendant.
Scope of Name Dialing	Specify whether name dialing applies across the Enterprise, Group or Department of the Auto Attendant.
Name Dialing Entries	Define how a caller should say the name of the person they want to reach. LastName + FirstName: The caller must first enter the last name of the person and then enter the first name. LastName + FirstName and FirstName + LastName: The caller can enter either the last name and then the first name of the person, or the first name and then the last name.
Business Hours	Use the Business Hours tab to specify the business hour schedule , Greetings and dialing Menu
After Hours	Use the After Hours tab to specify the Afterhours schedule, Greetings and dialing Menu
Holiday Hours	Use the Holiday Tab to specify the Holiday hour , , Greetings and dialing Menu
Call Policies	Use this menu to set specific policies for the auto attendant

Figure 16

Profile

Submenus

Calling Features

My Calls

Announcements

Profile

Save

\* indicates required field.

Profile

Auto Attendant ID: 021920151536-041000@dev.shawbusiness.ca Phone Number: Extension: 1000

Type: Standard

\* Name: AA\_021920151536-04\_01

\* Calling Line ID: \* Last Name: Auto \* First Name: Attendant

Department: None

Language: English

Time Zone: (GMT-06:00) (Canada) Mountain Time

Scope of Extension Dialing: Enterprise Group Department

Scope of Name Dialing: Enterprise Group Department

Name Dialing Entries: Last Name + First Name Last Name + First Name and First Name + Last Name

Business Hours After Hours Holiday Hours

Business Hours: Every Day All Day This value applies for both "Business Hours" and "After Hours" tabs.

Business Hours Greeting: Default Greeting Personal Greeting

Business Hours Dialing Menu: Enable first-level extension dialing

Key Description	Action	Details
0 Operator	Transfer With Prompt	Phone Number: 5873932944
1 Extension Dialing	Extension Dialing	
2 Name Dialing	Name Dialing	
3 Admin	Transfer To Submenu	Details Administration Edit
4 Customer Service	Transfer To Submenu	Details ABC Plumbing Sun Menu 1 Edit
5 Hours	Transfer To Submenu	Details Hours Edit
6 Exit	Exit	
7	---	
8	---	
9	---	
* Repeat	Repeat Menu	
#	---	

Figure 17

Call Policies

View or modify Call Policies for the User

Connected Line Identification Privacy on Redirected Calls: No Privacy Privacy For External Calls Privacy For All Calls

Send Call Being Forwarded Response on Redirected Calls: Never Internal Calls All Calls

Calling Line Identity for Redirected Calls: Originating Identity Redirecting User Identity For External Redirections Redirecting User Identity For All Redirections

# Configure Business Hours, Greetings and Dialing Menus

## Configure business hours

Use the Business Hours tab to specify the dialing menu of prompts and actions to be used during business hours in the End User Portal

**Group Services -> Site Services -> Auto Attendant -> Select: <Select an Auto Attendant> -> Profile -> Business Hours Tab**

1. Specify the Business Hours schedule. Select a Time Schedule for the Business Hours from the drop-down list. This value applies for both "Business Hours" and "After Hours" menus.

Refer back to the “Configure time and holiday schedules section for details on how to set a time schedule.

Figure 18

Business Hours

After Hours

Holiday Hours

Business Hours: ABD Distribution This value applies for both "Business Hours" and "After Hours" tabs.

2. In the Business Hours Greeting section, select Default greeting for the standard system generated greeting or



select **Personal Greeting** to apply a greeting from the **Announcement Repository**.

Figure 19

Business Hours

After Hours

Holiday Hours

Business Hours: 

ABD Distribution

 This value applies for both "Business Hours" and "After Hours" tabs.

Business Hours Greeting

Default Greeting

Personal Greeting

None

None

Auto Attendant.wav

AA Test#1.wav

TestAnnouncement.wav (Group)

Auto Attendant - Standard.wav (Group)

Auto Attendant - Holiday.wav (Group)

Call Queue - Entrance Message.wav (Group)

Call Queue - Comfort Message.wav (Group)

Music On Hold #1.wav (Group)

Music On Hold #2.wav (Group)

3. Check or uncheck **Enable first-level extension dialing**. This feature allows the caller to interrupt the greeting and dial an extension without having to select an option first. This feature is more convenient for callers who know the extension of the person they want to reach.

Figure 20

Business Hours Dialing Menu

Enable first-level extension dialing

Key	Description	Action	Details
0			
1			
2			
3			
4			
5			
6			
7			
8			
9			
*			
#			

4. Specify menu options for callers (see below table for details)

Field	Description
Key	A key on a telephone keypad to which you can assign an action.
Description	Description of the menu option.
Action	Select an action to be performed when the key is pressed by the caller.
Details	Appears for actions that require additional data, such as a phone number or submenu name

The Action control offers the following choices for Menu and Submenus:

Action	Explanation
Transfer With Prompt	This informs the caller that is being transferred and transfers the call to the phone number or extension provided in the Details column.
Transfer	This transfers the call to the phone number or

Without Prompt	extension provided in the Details column without playing any prompt to the caller.
Transfer To Operator	The caller is played a message informing them that they are being transferred to the operator and the call is transferred to the number in the Details column. All operator functions of the auto attendant will use this transfer path once this operator phone number is set.
Transfer To Submenu	The caller is transferred to the indicated submenu and played the greeting defined for that submenu.
Name Dialing	The caller is provided with access to name dialing and asked to enter the name of the party they are trying to reach using the phone keypad. The caller is played the name of the called party and is then transferred.
Extension Dialing	The caller is provided with access to extension dialing and asked to provide an extension. The caller is played the name of the called party provided and then is transferred.
Repeat Menu	The Menu or Submenu greeting is played to the caller.
Return to Previous Menu	The caller is transferred to the previous menu and the greeting for the previous menu is played. This option is only available in the Submenu selection.
Exit	The caller is thanked for calling and the call is released.
--	Indicates that no action has been selected. Menu greeting is played to the caller after an error message.

Figure 21

Business Hours | After Hours | Holiday Hours

Business Hours: ABD Distribution | This value applies for both "Business Hours" and "After Hours" tabs.

Business Hours Greeting

☐ Default Greeting  
☒ Personal Greeting  
Auto Attendant - Standard.wav (Group)

Business Hours Dialing Menu

☒ Enable first-level extension dialing

Key	Description	Action	Details
0	Operator	Transfer With Prompt	Phone Number: 5873932942
1	Extension Dialing	Extension Dialing	
2	Name Dialing	Name Dialing	
3	Admin	Transfer To Submenu	Details: Administration Edit
4	Customer Service	Transfer To Submenu	Details: ABC Plumbing Sub Menu 1 Edit
5	Hours	Transfer To Submenu	Details: Hours Edit
6	Exit	Exit	
7			
8			
9			
*	Repeat	Repeat Menu	
#			

## 5. Click Save:

### Note:

- If an action that requires a phone number is selected, Phone numbers can include the Feature Access Code prefix to activate Direct Voice Mail Transfer (\*55) to transfer calls directly to the mailbox of a phone number or extension in the same group. For example \*55\*4035551234
- Callers who do not press any key in a Menu will be transferred to the operator. If no operator is configured, the call will be terminated.

Callers who do not press any key in a Submenu after the greeting has been played three times will be forwarded to the operator. If no operator is configured, the call will be terminated.

## Configure after hours

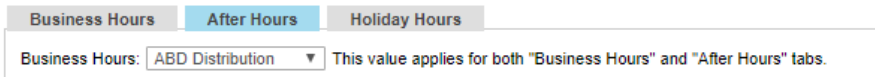
Use the After-Hours tab to specify the dialing menu of prompts and actions to be used after business hours in the End User Portal:

Group Services -> Site Services -> Auto Attendant -> Select: <Select an Auto Attendant> -> Profile -> AfterHours Tab

1. Specify the Business Hours schedule. Select a Time Schedule for the After Hours from the drop-down list. This value applies for both "Business Hours" and "After Hours" menus.

Refer back to the “Configure time and holiday schedules section for details on how to set a time schedule.

Figure 22



The screenshot shows a configuration interface with three tabs: 'Business Hours', 'After Hours' (selected), and 'Holiday Hours'. Below the tabs, there is a label 'Business Hours:' followed by a dropdown menu showing 'ABD Distribution' and a small downward arrow. To the right of the dropdown, a text note states: 'This value applies for both "Business Hours" and "After Hours" tabs.'

2. Repeat steps 2-5 from the Configure Business Hours, Greetings and Dialing Menus Section to set the Greetings and Menus

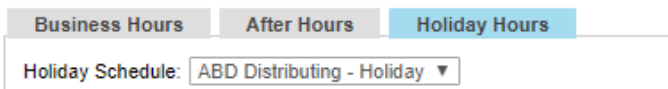
## Configure holiday hours

Use the Holiday tab to specify the dialing menu of prompts and actions to be used for holiday hours In the End User Portal:

Group Services -> Site Services -> Auto Attendant -> Select: <Select an Auto Attendant> -> Profile -> Holiday Hours Tab

1. Specify the Holiday Hours schedule. Select a Time Schedule for the Holiday Hours from the drop-down list. Refer back to the “Configure time and holiday schedules section for details on how to set a time schedule.

Figure 23



The screenshot shows a configuration interface with three tabs: 'Business Hours', 'After Hours', and 'Holiday Hours' (selected). Below the tabs, there is a label 'Holiday Schedule:' followed by a dropdown menu showing 'ABD Distributing - Holiday' and a small downward arrow.

2. Repeat steps 2-5 from the Configure Business Hours, Greetings and Dialing Menus Section to set the Greetings and Menus

# Configure the Sub-Menus

The Submenus are used to build multilevel menus. In the End User Portal:

Group Services -> Site Services -> Auto Attendant -> Select: <Select an Auto Attendant> -> Submenus

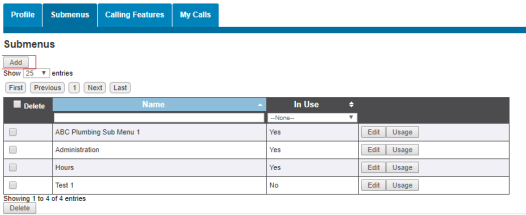
Follow these steps to Add every Submenu needed for the Auto-Attendant.

(The Edit submenu screen has the same options available as the Add submenu and the same steps can be

used to manage the submenu).

1. On the Auto-Attendant Submenu page, click Add:

Figure 24



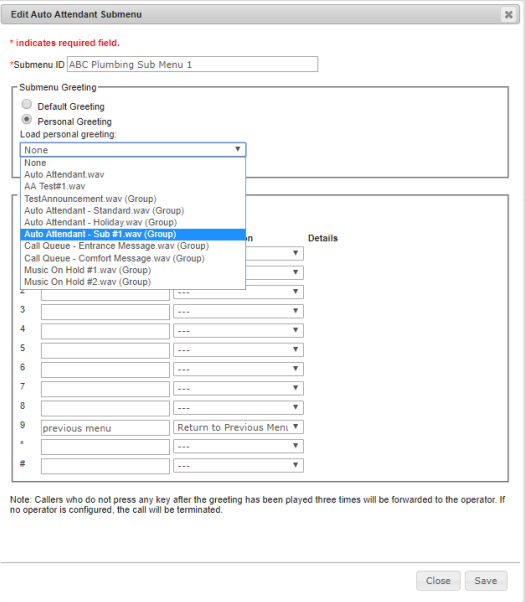
2. The Auto-Attendant Submenu Add page appears
3. In the Submenu ID text box, enter a name for the Submenu.

Figure 25



4. In the Submenu Greeting section, select Default greeting for the standard system generated greeting or select Personal Greeting to apply a greeting from the Announcement Repository.

Figure 5



5. Check or uncheck Enable extension dialing at any time. This feature allows the caller to interrupt the greeting and dial an extension without having to select an option first.

Figure 27

Enable extension dialing at anytime

Key	Description	Action	Details
0		---	
1		---	
2		---	
3		---	
4		---	
5		---	
6		---	
7		---	
8		---	
9	previous menu	Return to Previous Menu	
*		---	
#		---	

Note: Callers who do not press any key after the greeting has been played three times will be forwarded to the operator. If no operator is configured, the call will be terminated.

6. Specify menu options for callers. The required data applies for Submenus and Menus. For each option, provide the following data:

Field	Description
Key	A key on a telephone keypad to which you can assign an action.
Description	Description of the menu option.
Action	Select an action to be performed when the key is pressed by the caller.
Details	Appears for actions that require additional data, such as a phone number or submenu name

The Action control offers the following choices for Menu and Submenus:

Action	Explanation
Transfer With Prompt	This informs the caller that is being transferred and transfers the call to the phone number or extension provided in the Details column.
Transfer Without Prompt	This transfers the call to the phone number or extension provided in the Details column without playing any prompt to the caller.
Transfer To Operator	The caller is played a message informing them that they are being transferred to the operator and the call is transferred to the number in the Details column. All operator functions of the auto attendant will use this transfer path once this operator phone number is set.
Transfer To Submenu	The caller is transferred to the indicated submenu and played the greeting defined for that submenu.
Name Dialing	The caller is provided with access to name dialing and asked to enter the name of the party they are trying to reach using the phone keypad. The caller is played the name of the called party and is then transferred.
Extension Dialing	The caller is provided with access to extension dialing and asked to provide an extension. The caller is played the name of the called party provided and then is transferred.
Repeat Menu	The Menu or Submenu greeting is played to the caller.
Return to Previous Menu	The caller is transferred to the previous menu and the greeting for the previous menu is played. This option is only available in the Submenu selection.
Exit	The caller is thanked for calling and the call is released.
--	Indicates that no action has been selected. Menu greeting is played to the caller after an error message.

Figure 28

Edit Auto Attendant Submenu

\* indicates required field.

Submenu ID (ABC Plumbing Sub Menu 1)

Submenu Greeting

Default Greeting

Personal Greeting

Load personal greeting:

Auto Attendant - Sub #1.wav (Group)

Dialing Menu

Enable extension dialing at anytime

Key	Description	Action	Details
0	Operator	Transfer To Operator	Phone Number: 5873932943
1	Extension Dialing	Extension Dialing	
2	Name Dialing	Name Dialing	
3	Amy Yang	Transfer With Prompt	Phone Number: 5873932944
4		---	
5		---	
6		---	
7		---	
8		---	
9	previous menu	Return to Previous Menu	
*		---	
#	Repeat Menu	Repeat Menu	

Note: Callers who do not press any key after the greeting has been played three times will be forwarded to the operator. If no operator is configured, the call will be terminated.

Close

Save

7. Click Save:
- If an action that requires a phone number is selected, Phone numbers can include the Feature Access Code prefix to activate Direct Voice Mail Transfer (\*55) to transfer calls directly to the mailbox of a phone number or extension in the same group. For example, \*55\*4035551234
  - Callers who do not press any key in a Menu will be transferred to the operator. If no operator is configured, the call will be terminated.
  - Callers who do not press any key in a Submenu after the greeting has been played three times will be forwarded to the operator. If no operator is configured, the call will be terminated.



**For customer care and technical support Call 1-877-742-9249**

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