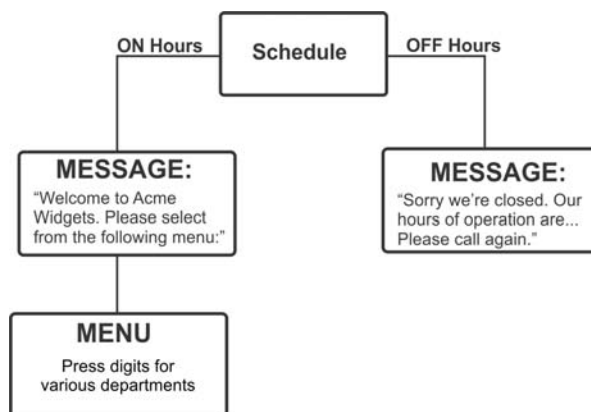


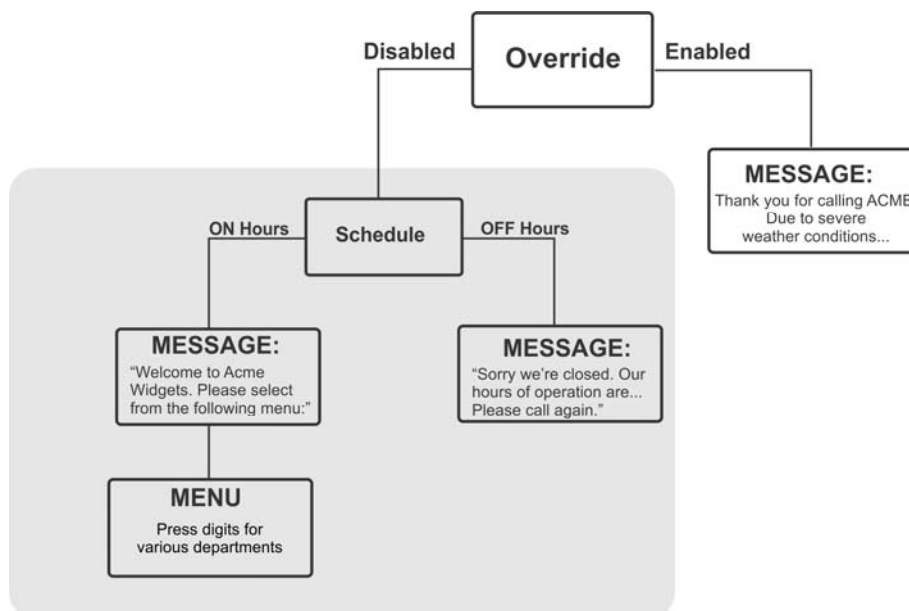
Tutorial 2: Creating a Call Flow for a Line Group

Planning the Call Flow

Each call flow is made up of one or more call handling **actions**. Each action ends with at least one **result**, depending on the circumstances surrounding the call. For example, during Acme Widgets' open hours (Monday - Friday 9:00 to 5:00), they might direct calls to different departments using a **Menu** action to ask the caller to press a key. During their closed hours, a **Message** action plays a "Sorry, we're closed." message. In this case, the call destination is decided by the time of day as programmed in the **Schedule** action.

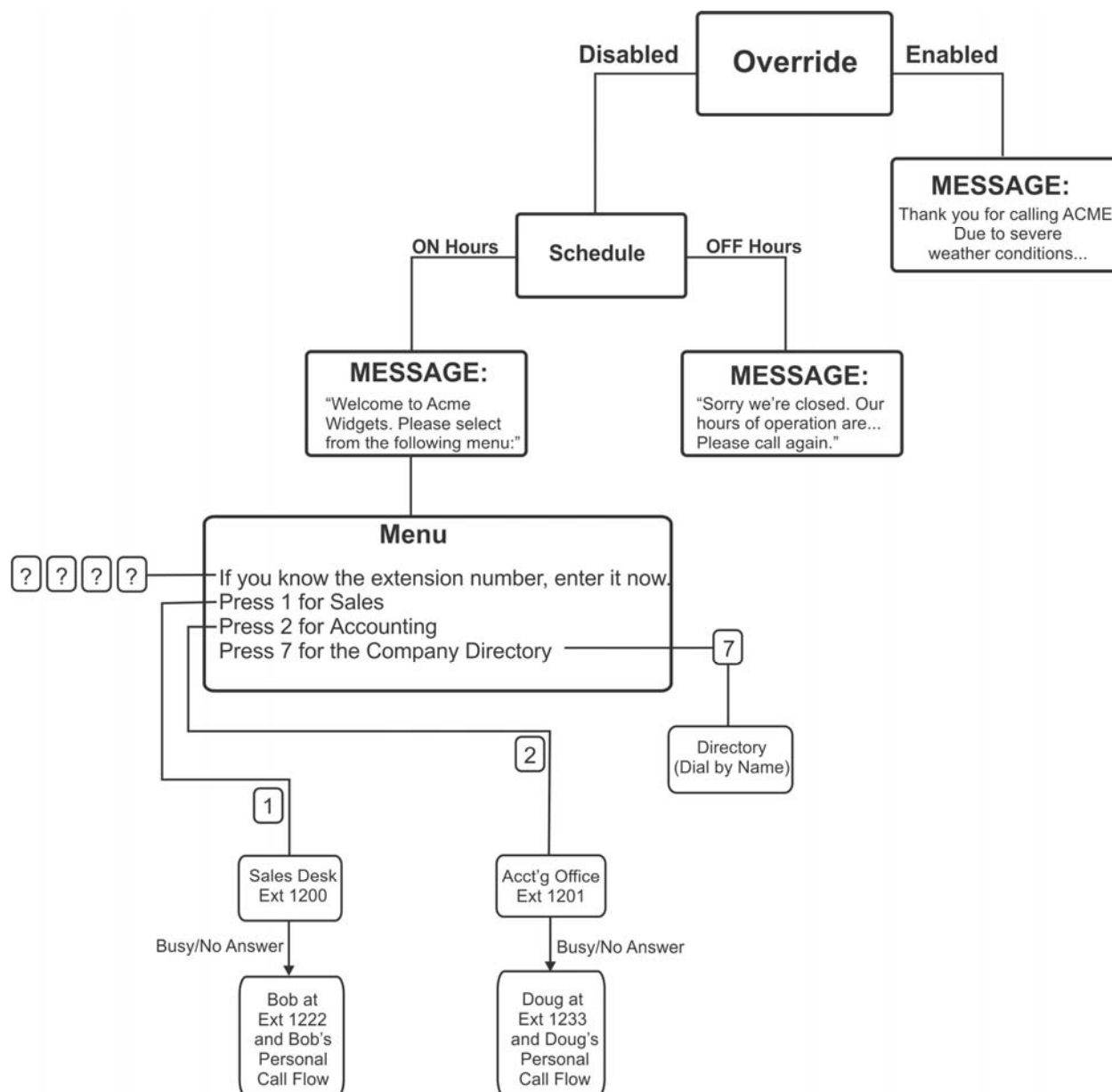


This is a good basic setup, but what happens when an unusual circumstance occurs? What if there is a record snowfall and the company cannot open on Monday? According to the **Schedule** action, on Mondays all calls should follow the "ON hours" flow. We need to provide an **Override** action that we can enable temporarily to introduce a special call flow for those unusual circumstances (for example, we can play a Message: "Thank you for calling Acme. Due to severe weather conditions, our offices are temporarily closed."). When the business is open again, we only need to disable the override to return to our regular call processing.



Now that we have a good basic call flow, we can add details for the On hours **Menu** to “Press 1 for Sales or press 2 for Accounting”. A “Sales” selection transfers to the Sales Desk. If the Sales Desk is busy or not answering, the call is transferred to Bob’s phone and then to Bob’s personal call flow. Likewise, an “Accounting” selection transfers to the Accounting Office and then to Doug’s personal call flow, if necessary.

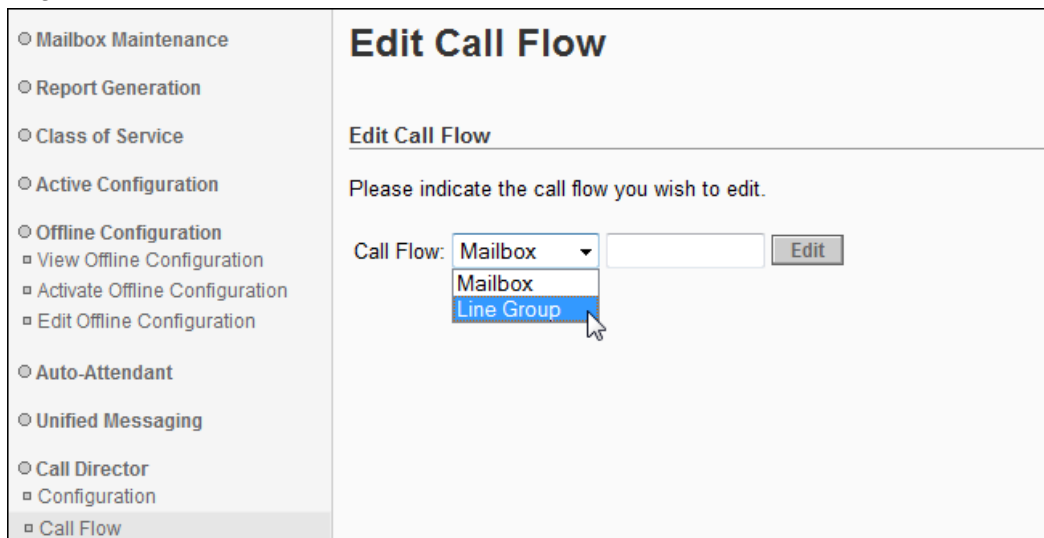
We can also add menu options for accessing the Company Directory and for callers to enter an extension number directly.



This diagram illustrates the completed call flow plan for Acme Widgets. It handles ON and OFF hours. It takes care of unusual circumstances like severe weather, and it provides a menu for callers to reach the company directory, a selected extension, or a department.

Programming the Call Flow

1. Log in to the NuPoint UM Web Console. Click **Call Director** and then click **Call Flow**.



Edit Call Flow

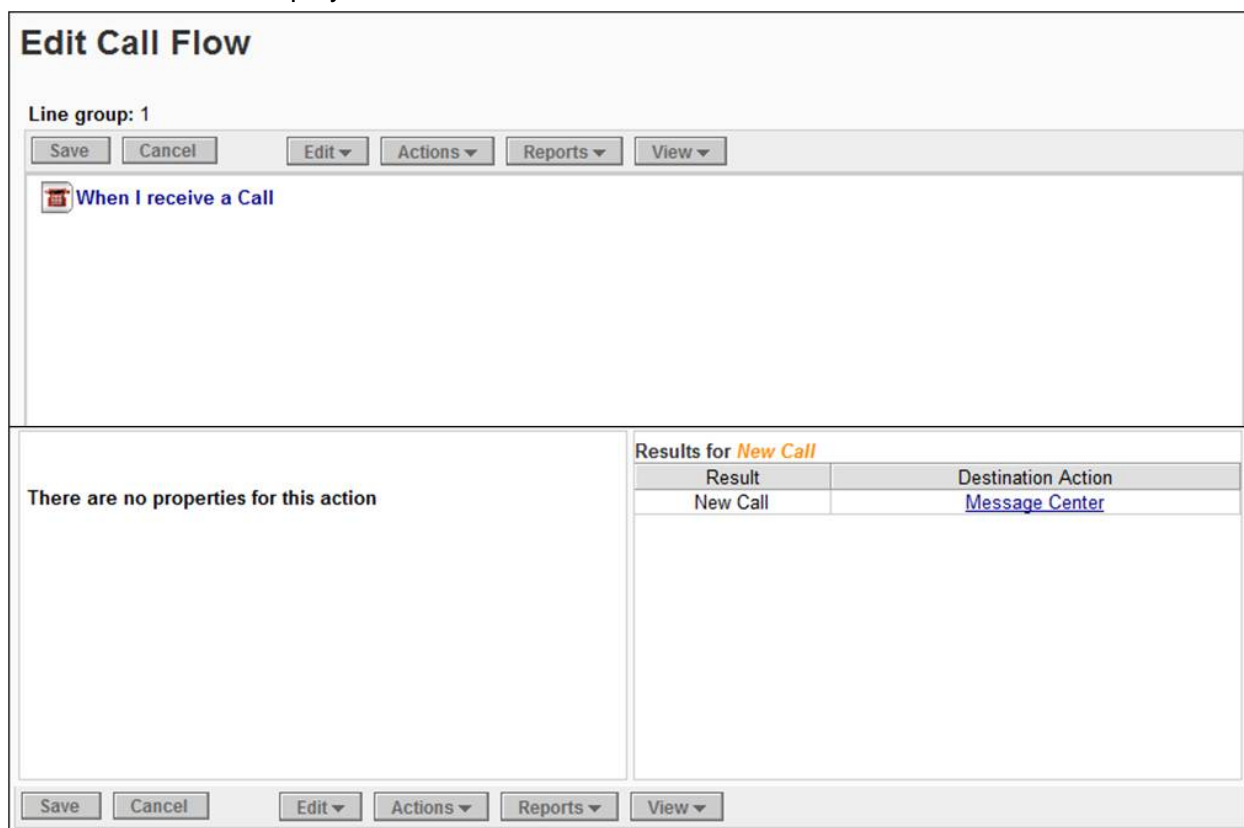
Edit Call Flow

Please indicate the call flow you wish to edit.

Call Flow: Mailbox Edit

Mailbox
Line Group


2. Select the **Line Group** call flow and enter the Line Group **number**. The Call Director interface is displayed:



Edit Call Flow

Line group: 1

Save Cancel Edit Actions Reports View

 **When I receive a Call**

There are no properties for this action

Results for *New Call*

Result	Destination Action
New Call	Message Center

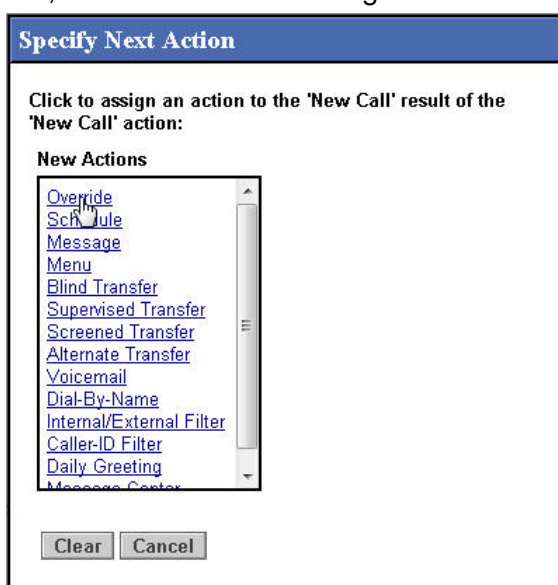
Save Cancel Edit Actions Reports View

Lesson 1: Programming an Override

An override changes the everyday call flow to handle unusual circumstances such as emergency closures due to extreme weather conditions.

To define an Override:

1. In the Actions window, beside **New Call**, click Message Center.
2. In the New Actions list, select **Override** to assign the Override action.



Check the call flow diagram and note that when the Override is **Enabled** (that is, when Acme Widgets is operating under unusual circumstances), they want to play a message that tells callers the company is closed due to severe weather.

3. In the Results area for the Override, click the Message Center action beside **Enabled**.

Over-Ride Properties		Results for Override	
Name:	Override	Result	Destination Action
Action Id:	001	Disabled	Message Center
Over-Ride Enabled:	<input type="checkbox"/>	Enabled	Message Center
		From Call Flow	Unassigned
		Extended Absence	Unassigned

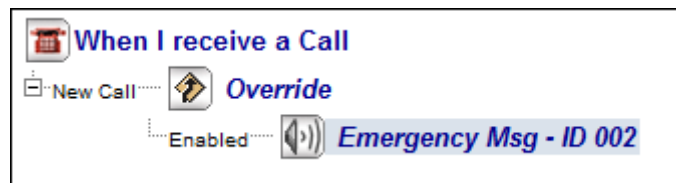
Note: You can enable and disable this action by dialing into your mailbox and pressing the * key. Then follow the instructions. You

4. In the New Actions list, click **Message**. To distinguish this message from other messages in the call flow, give it a unique **name** and include the Action ID for ease of maintenance. (For example "Emergency Msg - ID 002".) Don't worry about recording the message right now – you can record all messages after the call flow is set up.

Message Properties	
Name:	Emergency Msg *
Delay:	0 *
Suppress Hangup Prompt:	<input type="checkbox"/>
Action Id:	002
Message:	Recording Not Recorded

Results for <i>Message</i>	
Result	Destination Action
Done	Hang up

5. Click **Save**. The call flow window looks like this:



Tip: To activate an Override, the System Administrator can enable it remotely from any touch-tone phone:

- dial the NuPoint Unified Messaging access number
- enter the mailbox number followed by the * key
- enter the passcode
- follow the prompts to enable/disable Overrides. If you have multiple Overrides in a call flow, you'll need to know the Action ID.

Lesson 2: Programming a Schedule

Now you will program the actions required when the Override is **Disabled** (that is, when the company is operating under normal circumstances).

1. In the call flow display window, click **Override** to display the Actions window.
2. In the Results area for the Override, click the Message Center action beside **Disabled**

Results for <i>Override</i>	
Result	Destination Action
Disabled	Message Center
Enabled	Message:Emergency Msg - ID 002
From Call Flow	Unassigned
Extended Absence	Unassigned

3. In the New Actions list, select **Schedule**. Now you need to tell Call Director which hours are “On” and “Off”. (Tip: Think of “On hours” as “On Duty” hours.)
4. In the Schedule properties window, click **Weekly Schedule** and select the “On” hours:

Day of Week

☒ Monday
 ☐ Saturday
☒ Tuesday
 ☐ Sunday
☒ Wednesday
☒ Thursday
☒ Friday

Start Time

Hour 09 Min 00 AM

End Time

Hour 05 Min 00 PM

Add

5. Click **Add**. The programmed weekly schedule is displayed:

Day	Start Time	End Time	Action
Monday	09:00 AM	05:00 PM	Delete
Tuesday	09:00 AM	05:00 PM	Delete
Wednesday	09:00 AM	05:00 PM	Delete
Thursday	09:00 AM	05:00 PM	Delete
Friday	09:00 AM	05:00 PM	Delete

6. Click **OK**. A Call Director warning reminds you to save the Schedule (and the call flow) from the Call Flow window.

7. In the Call Flow window, click **Save**. The Weekly Schedule button changes color to indicate that a schedule is programmed.

Now that the schedule is set up, we need to define the actions to take during On-hours and Off-hours.

To define the Off-hours actions:

8. In the call flow display window, the **Schedule** action should still be highlighted. If not, click it.
9. Click the Message Center action beside **Off hours**, to open the Actions menu.

Schedule Properties	
Name: <input type="text" value="Schedule"/>	
<input checked="" type="radio"/> Weekly Schedule	
<input type="radio"/> Holiday Schedule	

Results for <i>Schedule</i>	
Result	Destination Action
Off-hours	Message Center
On-hours	Message Center

10. In the Actions menu, select **Message**. Enter a unique **name** for the Message (example "Closed Message – ID 004"). Don't worry about recording the message right now – you can record all messages after the call flow is set up.

Message Properties	
Name: <input type="text" value="Closed Message"/>	
Delay: <input type="text" value="0"/>	
Suppress Hangup Prompt: <input type="checkbox"/>	
Action Id: <input type="text" value="004"/>	
Message: <input checked="" type="radio"/> Recording <input type="radio"/> Not Recorded	

Results for <i>Closed Message</i>	
Result	Destination Action
Done	Hang up

Note: You can record the audio for this action by dialing into your mailbox and pressing the * key. Then follow the instructions. You will need the Action ID mentioned above.

11. Click **Save**.

In this example, the call flow hangs up after playing the "Sorry, we're closed" message. You could also program other actions (like a transfer to voice mail) by clicking the Hang up action.

That completes the Off-hours programming. Now we'll program the On-hours actions.

To define the On-hours actions:

12. In the call flow display window, click **Schedule**.
13. Click the Message Center link beside **On-hours** to open the Actions menu.

14. In the Actions menu, select **Message**.
15. Enter a unique **name** for the Message (for example "Welcome Msg – ID 005")

Message Properties

Name:

Delay:

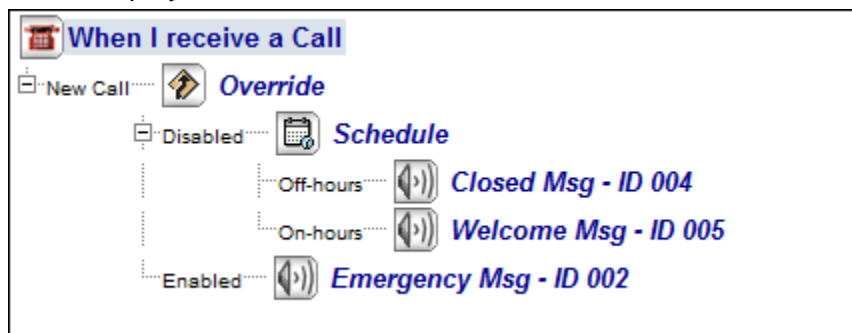
Suppress Hangup Prompt: ☐

Action Id:

Message: ☒ Recording ☐ Not Recorded

Don't worry about recording the message right now – you can record all messages when the call flow is complete.

16. Click **Save** to save the call flow.
17. Your call flow display window should look like this:



Lesson 3 – Programming a Menu

When the Welcome message has finished playing, Acme wants to present callers with a menu from which they can access one of the following:

- The Sales Desk
- The Accounting Office
- The Company Directory
- An employee's 4-digit extension number

To program the menu:

1. In the Results area for the Welcome message, click the Hang up link beside **Done**.
2. In the Actions menu, select **Menu**. The Menu results screen is displayed:

Result	Destination Action
0	Retry
1	Retry
2	Retry
3	Retry
4	Retry
5	Retry
6	Retry
7	Retry
8	Retry
9	Retry
#	Retry
*	Retry

According to the call flow plan, we need to program the **1** key to make a Supervised Transfer to the Sales Desk (extension 1200).

Note: Ensure that you have set up the required programming for Supervised Transfers to work properly. See “About Supervised Transfers” earlier in this module.

3. Click the Retry link beside **Menu** option **1** and select the **Supervised Transfer** action. The Properties window opens:

Result	Destination Action
Busy	Message Center
No Answer	Message Center
Invalid	Message Center

4. In the **Name** field, modify the name as a reminder for where the call is being transferred. (For example, “Supervised Transfer to Sales”).
5. In the Transfer To: list, select **Specified Extension** and enter the **Extension** number to which you want to transfer. (1200 in this example).

We programmed a Supervised Transfer so that we can redirect the call to Bob's extension (1222) if the Sales Desk is busy or not answering. Now we need to configure this action.

6. In the Results area for Supervised Transfer, click the Message Center action beside **Busy**.
7. In the Actions list, select Blind Transfer. (We want unanswered calls to ring Bob's phone and then, if necessary, follow his personal call flow.)
8. Enter a descriptive **name** for the transfer ("Blind Transfer to Bob's Ext).
9. Select **Specified Extension** and enter Bob's **extension** number (1222).

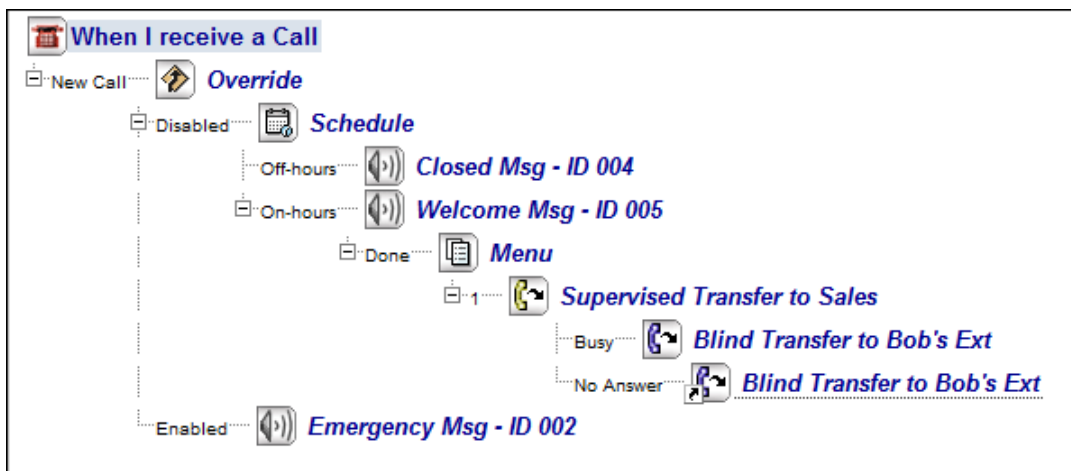
Blind Transfer Properties		Results for <i>Blind Transfer</i>	
		Result	Destination Action
Name:	Blind Transfer to Bob's Ext *		
Transfer To:	Specified Extension ▼		
Extension:	1222		
Suppress Prompt:	<input type="checkbox"/>		
Try call-flow first:	<input type="checkbox"/>		

10. In the Call Flow window, click **Supervised Transfer to Sales** to re-open the results area.
11. In the Results area for Supervised Transfer, click the Message Center action beside **No Answer** and program it as a transfer to Bob's extension also. You can re-use the Existing Action "Blind Transfer to Bob's Ext".

New Actions	Existing Actions
Override	Override
Schedule	Schedule
Message	Stat Holiday Msg - ID 002
Menu	Closed Msg - ID 004
Blind Transfer	Welcome Msg - ID 005
Supervised Transfer	Menu
Screened Transfer	Supervised Transfer to Sales
Alternate Transfer	Blind Transfer to Bob's Ext
Voicemail	
Dial-By-Name	
Internal/External Filter	
Caller-ID Filter	
Daily Greeting	
Message Center	

12. In the Call Flow window, click **Save** to save your programming.

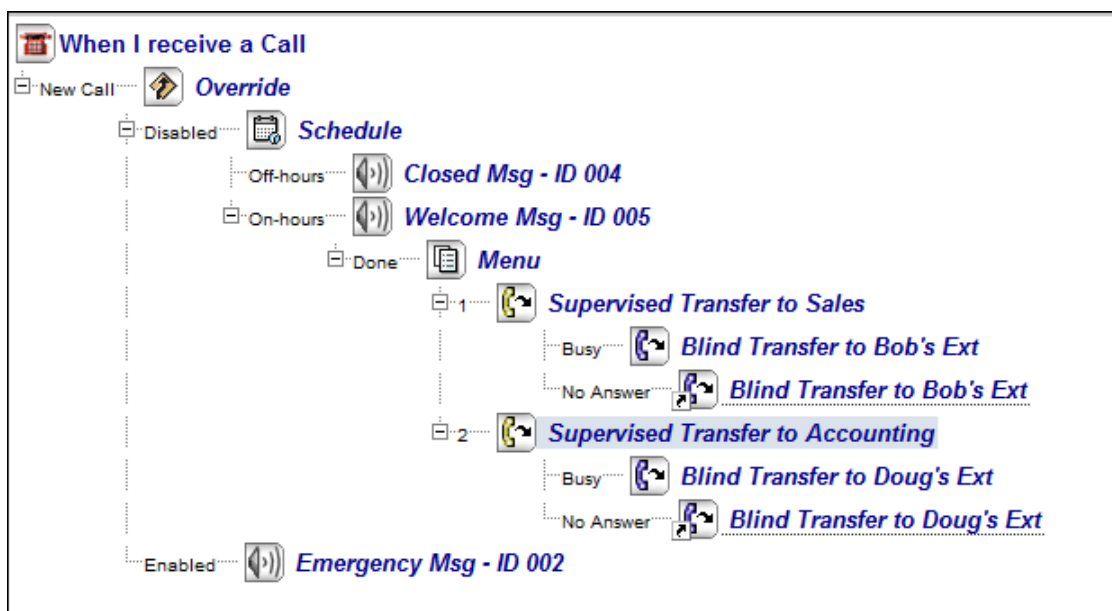
Your call flow window should look like this:



Now you need to program **Menu** option **2** to make a Supervised Transfer to the Accounting Office. The programming steps are the same as the Supervised Transfer to Sales. Here's a recap:

- In the call flow display window, click **Menu** to open the Results area.
- Click the Retry link beside Menu option **2** and select **Supervised Transfer**.
- Name the transfer ("Supervised Transfer to Accounting") and specify an extension (in this example, Ext 1201)
- Program the Busy and No Answer results of the Supervised Transfer as **Blind Transfers** to Doug's phone (in this example, Ext 1233). Don't forget that once you program the action Blind Transfer to Doug's extension, you can re-use it.
- In the Call flow window, click **Save**.

Your call flow should look like this:




Lesson 4: Providing a Company Directory Menu Option

Checking the call flow plan, we see that **Menu** option **7** should send callers to the Company Directory.

1. In the Call Flow window, click **Menu**.
2. In the Results area beside menu item **7**, click the Retry link and select the **Dial-by-Name** action.



 **Tip:** We recommend that you use a menu digit that is not used as the start digit for any of your extension numbers.

3. In the Actions window, Call Director automatically programs the transfer. (If a matching extension is found for the entered digits, a Blind Transfer is performed. If no match is found, the caller is transferred to the Attendant.)

Dial-By-Name Properties		Results for <i>Dial-By-Name</i>	
Name: <input type="text" value="Dial-By-Name"/> *		Result	Destination Action
Last Name First: <input type="checkbox"/>		Match	Blind Transfer
Suppress Extension: <input type="checkbox"/>		No Match	Attendant

Notes:

- For the Dial-By-Name action to work, the NuPoint UM dialing plan for the line group associated with Call Director must have the letter 'A' somewhere in it. The 'A' triggers the prompt to spell the name. (For example, a dialing plan of 4,4,4,4,4,4,A,4,4 uses the '7' key as the Dial by Name access digit.)
- To be identified by Dial-by-Name, the FCOS assigned to a user's mailbox must contain feature bit 092.

Lesson 5: Providing the “Dial by Extension” Menu Option

To program the option for callers to enter an extension number and be transferred:

1. In the call flow display window, click **Menu**.
2. In the properties window, in the **Maximum DTMF length** field, type **4** (or the number of digits that comprise your extensions).

Note: This step is essential for proper Multi-key operation!

Menu Properties

Name: Sales Menu *

Maximum DTMF Length: 4

Retry Count: 3 *

Timeout: 3 *

Action Id: 001

Prompt: ☒ Recording ☐ Not Recorded

Note: You can record the audio for this action by dialing into your mailbox

1	Supervised Transfer:Supervised Transfer_Sales
2	Supervised Transfer:Supervised Transfer_Service
3	Retry
4	Retry
5	Retry
6	Retry
7	Retry
8	Retry
9	Retry
#	Retry
*	Retry
Multi-key	Hang up
Error	Hang up
Timeout	Retry

3. In the Actions window, scroll down to Multi-key and click Hang up to display the actions menu.
4. In the actions menu, select **Blind Transfer** and give it a **name** (example: Blind Transfer to Dialed Ext).

Blind Transfer Properties

Name: Blind Transfer to Dialed Ex *

Transfer To: **Gathered Digits**

Extension:

Suppress Prompt: ☐

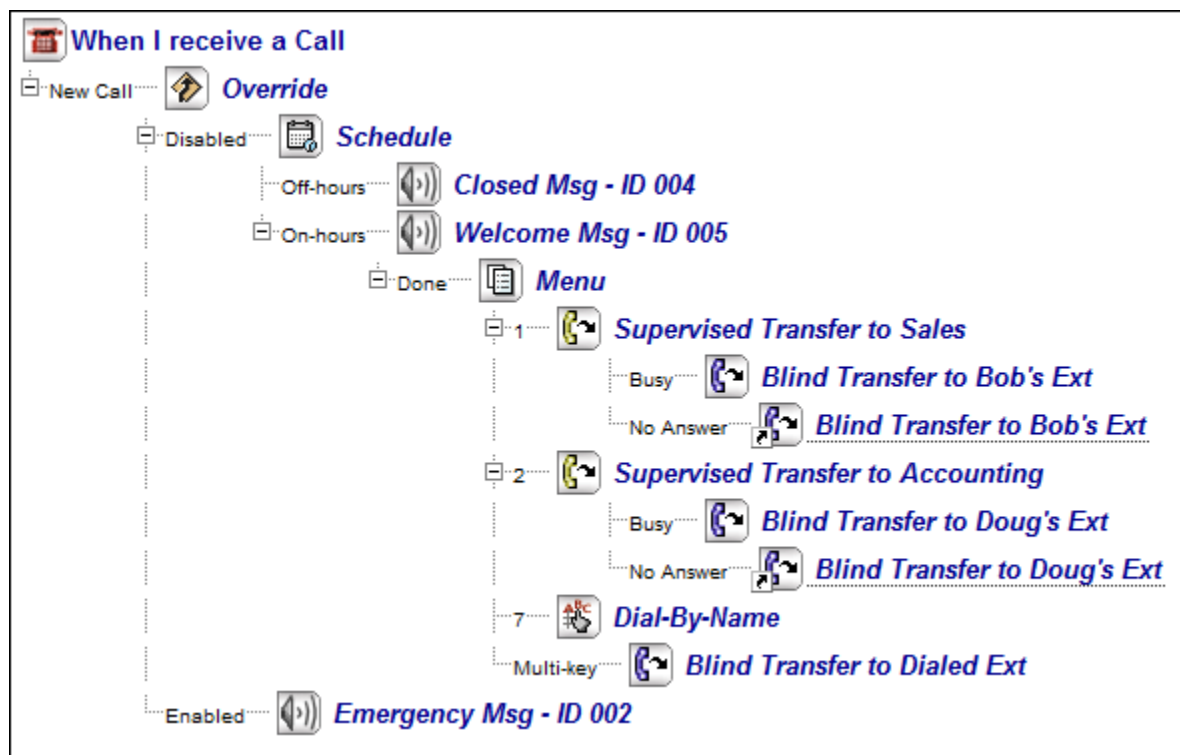
Try call-flow first: ☐

Results for Blind Transfer to Dialed Ext

Result	Destination Action
--------	--------------------

5. In the **Transfer To:** list, select **Gathered Digits** and then click **Save**.

Here is the completed call flow for Acme Widgets:



6. Record messages/greetings and test the flow as described in Tutorial 1. Here are the messages required for this tutorial:

Recording Status					
To make a recording, click on the appropriate "record" button and call into your mailbox. Press * and follow the instructions					
To import a recording, click the appropriate 'Import' button, specify the file name and press 'Start Import'.					
ID	Element	Status	Action		
004	Emergency Msg - ID 002	Not Recorded	Record	Import	
006	Closed Message - ID 004	Not Recorded	Record	Import	
007	Welcome Message - ID 005	Not Recorded	Record	Import	
008	Menu	Not Recorded	Record	Import	