

# Virtual Receptionist Web Interface

## Quick Reference Card

### My Account

Click on “My Account” next to the Logout option in top right section of the screen to change your security PIN.

We recommend you regularly change your PIN. To change your PIN, enter your old PIN, then a new PIN (between 4 and 10 digits) and confirm it by typing it a second time. Click “Update” to save the change.

### General Mailbox

- The Virtual Receptionist supports a general mailbox where you can view and manage your business messages. All voice messages and faxes are stored on this mailbox. The general mailbox has its own greeting and provides the option to be notified of new messages.

- To view and manage your general mailbox messages, click on “Home” at the top menu and, once the menu changes, click on “Messages”. You will see Inbox and Trash tabs.

- Select Inbox. All messages in the mailbox will be displayed; unread messages are highlighted. Messages can be sorted by date or caller as well as marked as new; easily save or delete old messages. To listen to the message, click the blue play icon associated with the message


### Configuring the General Mailbox

From the messages interface, click on “Options” on the menu bar. You will have two tabs to configure Notifications and Mailbox Greeting.

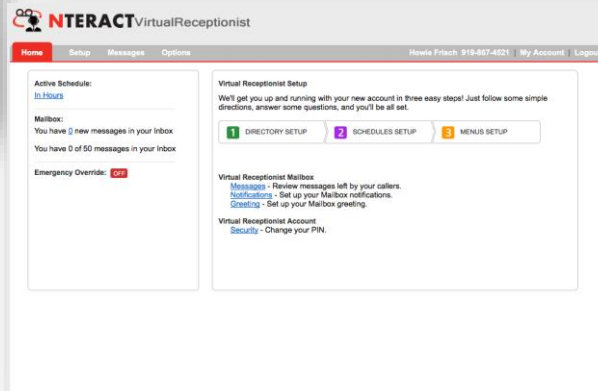
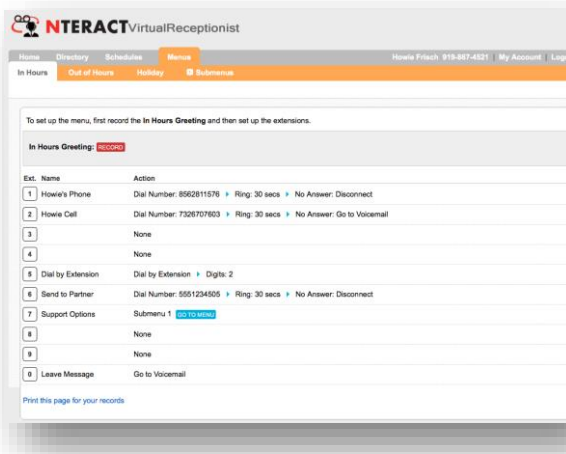
Choose how you wish to be notified when a new message is received:

- **email**— the system will send an e-mail to a specified address with the message attached as a sound file.
- **SMS/Text Msg** — the system will send a text notification to the mobile number specified. The text shows the calling number and the duration of the message.
- **Phone** — the system will call a specified phone number and play your new message (you must enter your PIN).

Once you are satisfied with your selections, click “Update”

Clicking “Mailbox Greeting” tab on the menu bar will let you play the existing mailbox greeting. You can modify it by clicking on the  button.

A new window will open allowing you to upload a WAV or MP3 file from your computer or enter a phone number. That number will ring and upon answering the system will prompt you to record your greeting.



## Accessing Virtual Receptionist

- Open a web browser and enter the service's address:  
<http://vm-cim.genband.com>
- Enter the account's full phone number as the username
- Enter the account's PIN
- *If you are logging in for the first time, the default PIN is the last 4 digits of the account's number*

Upon login you'll be directed to the home screen. A panel on the left shows a summary of Active Schedule, Mailbox (showing new and read voicemails) and Emergency Override status.

On the right, you are presented with the Virtual Receptionist Setup wizard that allows you to setup your service in 3 easy steps.

1 DIRECTORY SETUP   2 SCHEDULES SETUP   3 MENU SETUP

## Setting Up Virtual Receptionist

You can start the setup process by selecting Step 1 (Directory Setup) from the setup wizard in the home screen or clicking the "Setup" tab

### The Directory

This optional feature allows callers to reach individuals in your organization by using the keypad to dial the extension number or their name.



To add an entry, click on "Add Entry" and provide first and last name, extension (2-5 digits), action and email (optional).

3 possible actions can be configured:

- **Dial** – to forward the call to a telephone number
- **Voicemail** – to prompt the caller to record a message
- **Account** – to instruct the system to transfer the caller to another account on the system (e.g. a voicemail account or another auto attendant)

**NOTE:** It is important that you choose a number range for your extensions and take note of the first number (e.g. extensions from 5001 to 5099, begin with 5) that number will be reserved on the dial pad for extension dialing.

- The "options" tab lets you select the last name, the first name or both as the searching criteria for dial by name
- You can import and export directory entries using CSV files by clicking on the "import" or "export" tabs.

After adding your directory entries, you can create a Name Recording by clicking on the **RECORD** button.

A new window will open allowing you to upload a WAV or MP3 file from your computer or enter a phone number. That number will ring and upon answering the system will prompt you to record your greeting.

### Schedules

You can start the setup by selecting Step 2 (Schedules setup) from the setup wizard in the home screen or clicking the "Setup" tab and then selecting the "Schedules" tab.

The schedules feature allows you to configure in-hours, out-of-hours and holiday schedules. For each day of the week, you can define the opening and closing times with a granularity of 15 min.

You can add up to 16 holidays to the Holiday Schedule. On these dates, your holiday greeting will be played instead of your normally scheduled greeting.

Once you are satisfied our settings, click "Update"

### Menus

The Virtual Receptionist lets you configure 3 main menus:

- **In Hours**– will be executed when your business is open
- **Out of Hours**– will be executed when your business is closed
- **Holiday**– will be executed on predefined holidays

Each menu allows you to record a greeting (using the same process as in the directory) and assign extensions to keys from 1 to 0.

Configure your extensions by moving the cursor to the extension row and clicking the **EDIT** button when it appears.

Fill in the appropriate information:

- **Name** – enter the name of the person or department that is associated with this extension
- **Action** – there are multiple options:
  - **None** – means your caller is informed that it is an invalid extension
  - **Dial Number** – instructs the system to dial a telephone number. You can also enter the ring time (in seconds) and no-answer action (disconnect, go to voicemail, go to account)
  - **Go to Account** – instructs the system to transfer the caller to another account (e.g. a voicemail account or another auto-attendant)
  - **Submenu** – instructs the system to route the caller to another submenu
  - **Dial by Extension** – instructs the system to reserve this key for the Dial by Extension feature (see note under directory setup)
  - **Announce** – plays a personal announcement and then prompts the caller to replay or return to the previous menu. No voicemail message is offered (this can be used for store hours, product information, directions, show times, etc.)

Upon completion of the menu configuration you may click on "Print this page for your records" to get a hardcopy of the menu for future reference.

### Submenus

The Virtual Receptionist supports up to 7 unique submenus which can be used repeatedly throughout the automated attendant. These are in addition to the "In Hours", "Out of Hours" and "Holiday" menus. You may cascade submenus off of submenu extensions as well.

The caller can press \* in any submenu to return to the previous menu.



To configure a submenu, click on the Submenus option under the Menu tab. A list of numbers from 1 to 7 will expand to the right. Choose one of the numbers and the submenu will be presented. You can record a greeting and assign extensions as in any other menu.

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