



## Configuring the PBX Directory

For assistance, please call [1-800-453-2251](tel:1-800-453-2251) ext. 102.

With these instructions, you will:

1. Change your security code.
2. Record your main greeting.
3. Record additional directory (sub-menu) “Auto Attendant” greetings.
4. Configure your 911 setting.
5. Set up MobileConnect.
6. Create Call Flows for routing your calls.
7. Activate your greetings and Auto Attendants .
8. Modify your call routing with Hunt Groups and ToD Wrappers.

You need your:

1. Username (10-digit Hosted PBX number)
2. Password (initially, the last 4 digits of your number)

### To Change Your Security Code

Step 1. **Dial the 10-digit Hosted PBX number assigned to you.**

Step 2. **Press the \* key while the automated attendant is speaking.**

Step 3. The automated attendant will say, “*Please enter your security code.*” **Enter your temporary security code** (the last four digits of your Hosted PBX number).

After a brief pause, you will hear the attendant say, “*You have no voice messages...Main Menu...*” Note: If you accidentally left a message during Step 2, then you will have messages. Ignore those messages at this time.

Step 4. **Press “7”** (*Account Maintenance Menu*).

Step 5. **Press “4”**. The attendant will say, “*Security Code Menu. To review your Security Code, press “1”. To re-enter your Security Code, press “2”. To return to the previous menu, press \*.*”

Step 6. **Press “2”**. The attendant will say, “*Please enter a 4 to 8 digit security code. Make sure that this security code is easy to remember, but hard for intruders to figure out.*”

Step 7. After the beep, **enter your NEW security code. Your new code must be four to eight digits. Then wait for the attendant to speak. Do not press any more keys until you are prompted.** The attendant will say, “*To review, press “1”. To re-record, press “2”. If you are satisfied with your entry, press #. To return to the previous menu, press \*.*”

Step 8. **Press “1”** to review your new security code.

Step 9. **To re-enter your code, Press “2”. If you are satisfied, press #** to save the new code. The attendant will return you to the *Security Code Menu*.

### To Record Your Main Greeting

Consider how you want incoming calls to flow. You may want to jot down the order of menus and submenus that you intend to use. Please note that your services have been pre-configured by the Clarity System Administrator. Any changes will affect how your services function.

Step 10. **Press \*** (*Return to Account Maintenance Menu*).

Step 11. **Press “1”** (*Record Greetings Menu*).

Step 12. **Press “1”** to record the main PBX (Directory) Greeting that callers will hear. The attendant will say, “*Please begin recording at the tone.*”

Step 13. **Say your greeting. Then wait for the attendant to speak. Do not press any more keys until you are prompted.** The attendant will say, “*To review, press “1”. To re-record, press “2”. If you are satisfied with your message, press #. To return to the previous menu, press \*.*”

Step 14. **Press “1”** to review your Attendant greeting.

Step 15. **To re-record, press “2”. If you are satisfied, press #** to save the recording. The attendant will return you to the *Record Greetings Menu*.

### To Record Additional Directory (Sub-menu) “Auto Attendant” Greetings

Record a greeting for every extension (key punch option) that you are going to allow a caller to enter. These greetings will match the menus and submenus that you expect to use.

Step 16. **Press \*** (*Return to Account Maintenance Menu*).

Step 17. **Press \*** (Return to the *Main Menu*).

Step 18. **Press “2”** to reach the *Broadcast Menu*.

Step 19. **Press “1”** to record a voice file (broadcast).

Step 20. After the beep, **record your sub-menu “Auto Attendant” greeting. Then wait for the attendant to speak. Do not press any more keys until you are prompted.** The attendant will say, *“To review, press “1”. To re-record, press “2”. If you are satisfied with your entry, press #. To return to the previous menu, press \*.”*

Step 21. **Press “1”** to review your “Auto Attendant” greeting.

Step 22. **To re-enter your greeting, Press “2”. If you are satisfied, press #** to save. The system will prompt you to enter a document number for this voice recording. You may assign any number from 1 to 1000.

Step 23. **Enter the document number and press #.** The attendant will save your voice file and return you to the *Broadcast Menu*.

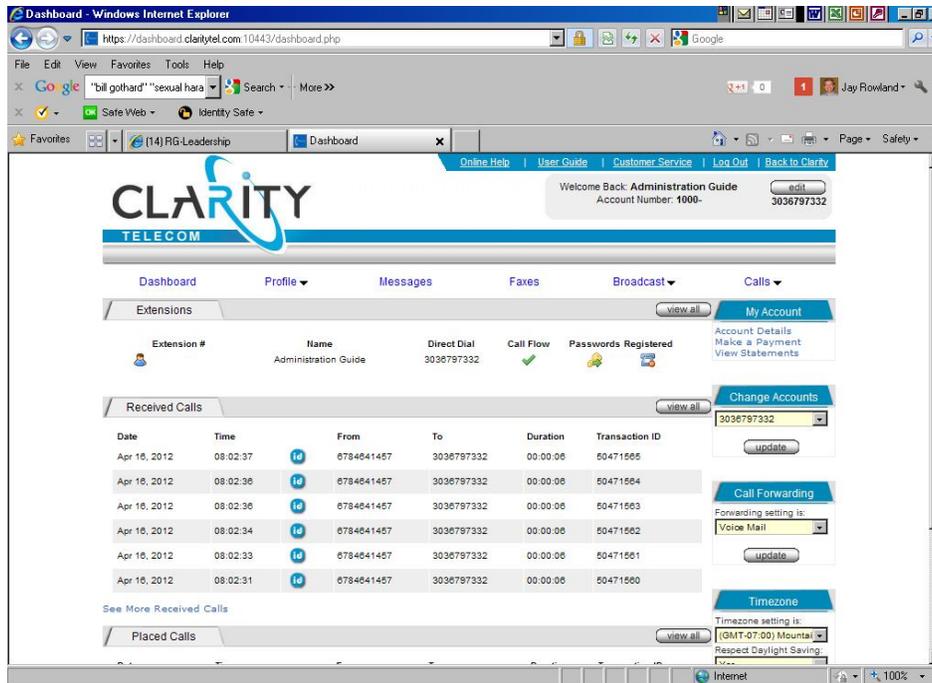
Step 24. Repeat the above steps to record any additional directory (sub-menu) “Auto Attendant” greetings.

Step 25. **Hang up.**

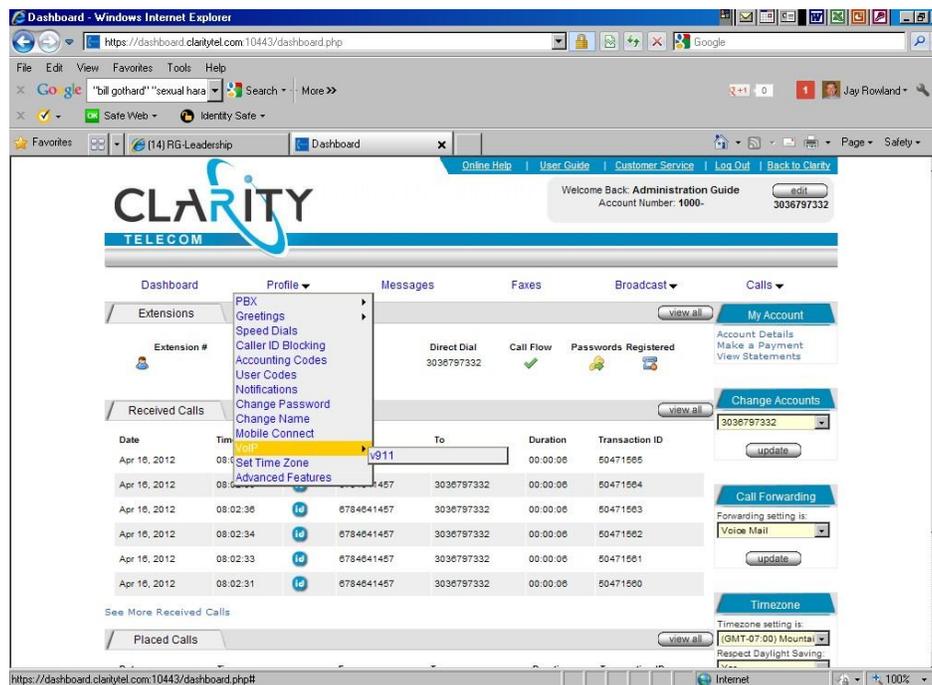
### To Configure Your v911 Setting

Step 26. **In your Internet browser, go to [www.ClarityTel.com](http://www.ClarityTel.com) to login.**

Step 27. **Enter your Username and Password. Click “Login” to go to your main dashboard.**  
You will see this screen.

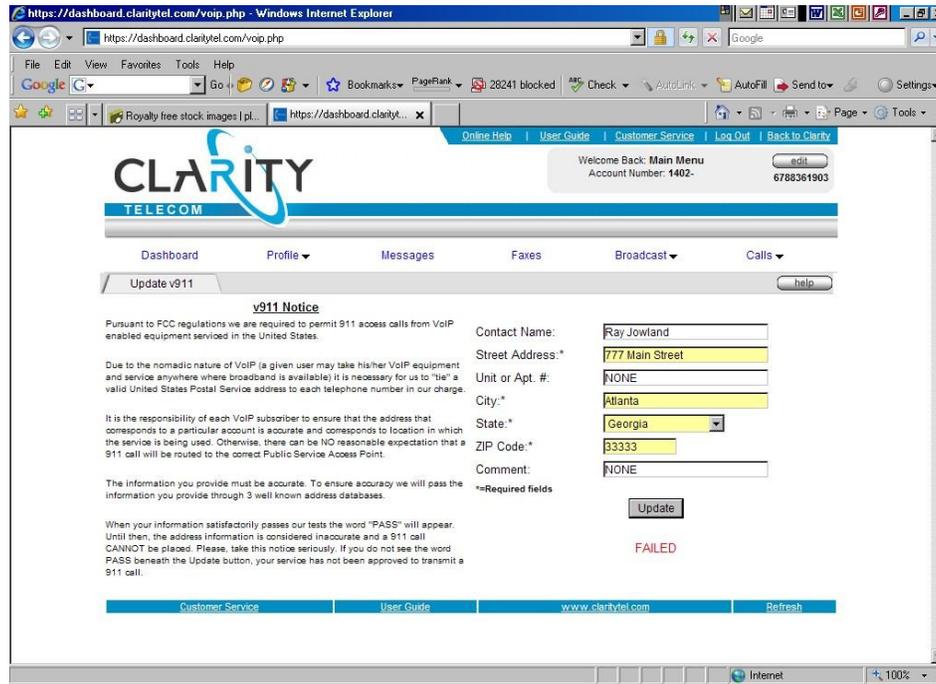


Step 28. Move your mouse over Profile / VoIP / v911 as shown below and Click.



Step 29. Enter your correct contact information and click "Update." Please be sure that this critical information is correct. In the example below, the red text under the "Update" button says "FAILED." This means that 911 will not function. For 911 to function, you must see the word "PASS" in green text.

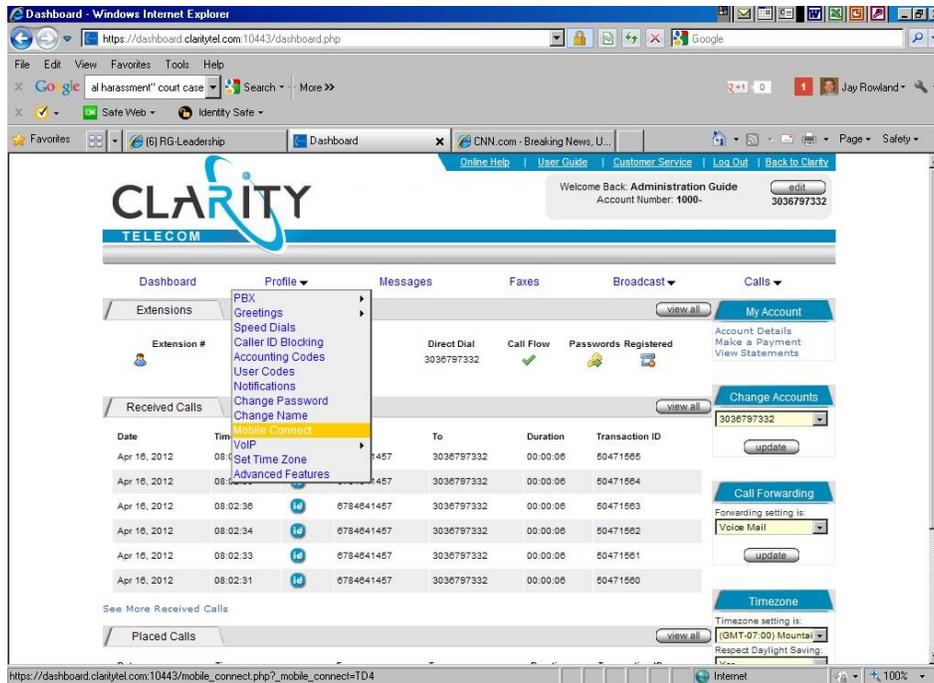
To configure 911 for individual phone lines, please see the “Personalizing Your Individual Phone Line” manual.



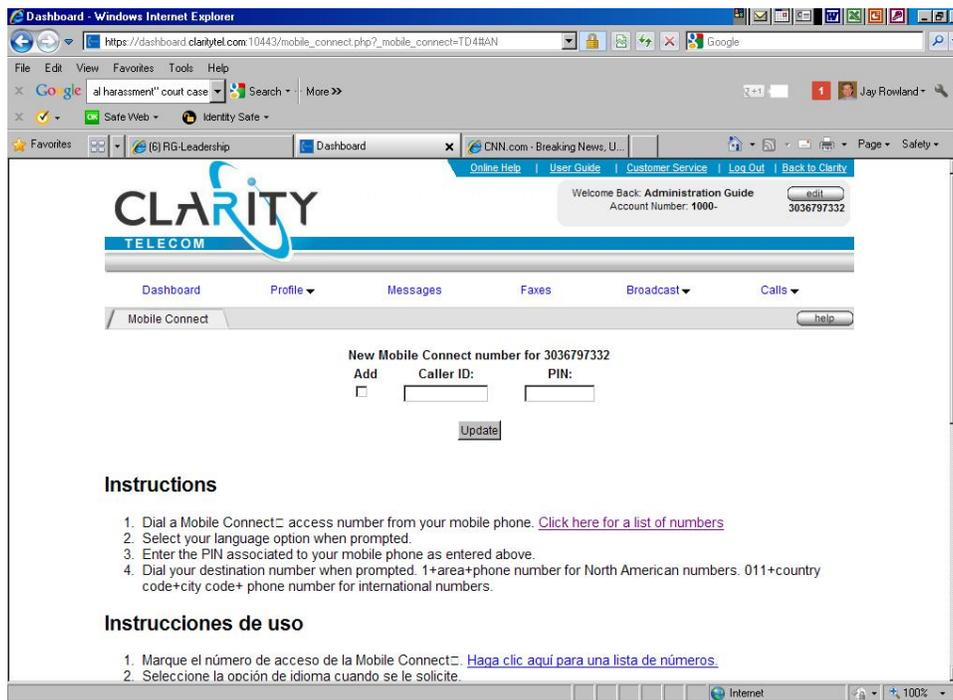
### To Set Up “Mobile Connect” (if part of your plan)

Mobile Connect may allow you to save minutes on international calls. Calls from your cell phone will be routed through our system before going international.

**Step 30. Move your mouse over Profile / Mobile Connect as shown below and Click.**



You will see the following screen.



**Step 31. Click the “Add” box, then enter your cell phone number in the “Caller ID” box. Your cell phone is the number from which you will be calling.**

**Step 32. Enter your PIN.**

Step 33. Click “Update.”

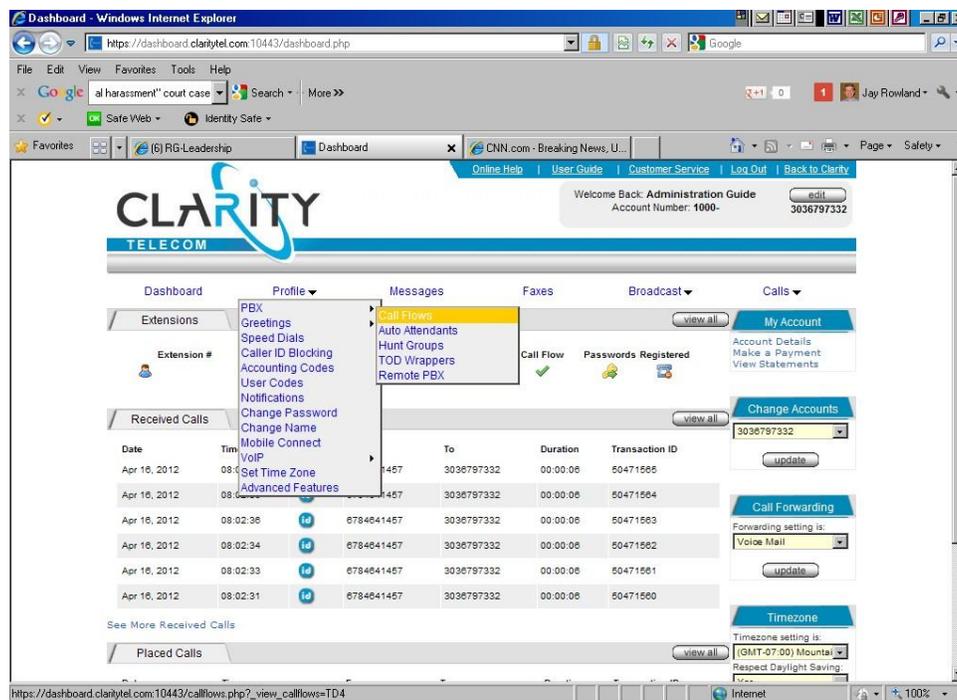
## To Create Call Flows for Routing Your Calls

Consider how you want incoming calls to flow. Plan ahead of time what you want to accomplish. As with the greetings that you record to be used in these call flows, have a list of the order of menus and submenus that you intend to use. You will create a Call Flow for each extension that you allow as an option for callers. For example, when a caller dials an extension, you may blast the call to all inside sales numbers as the first step. Your second step may be for an unanswered call to then ring the manager’s number.

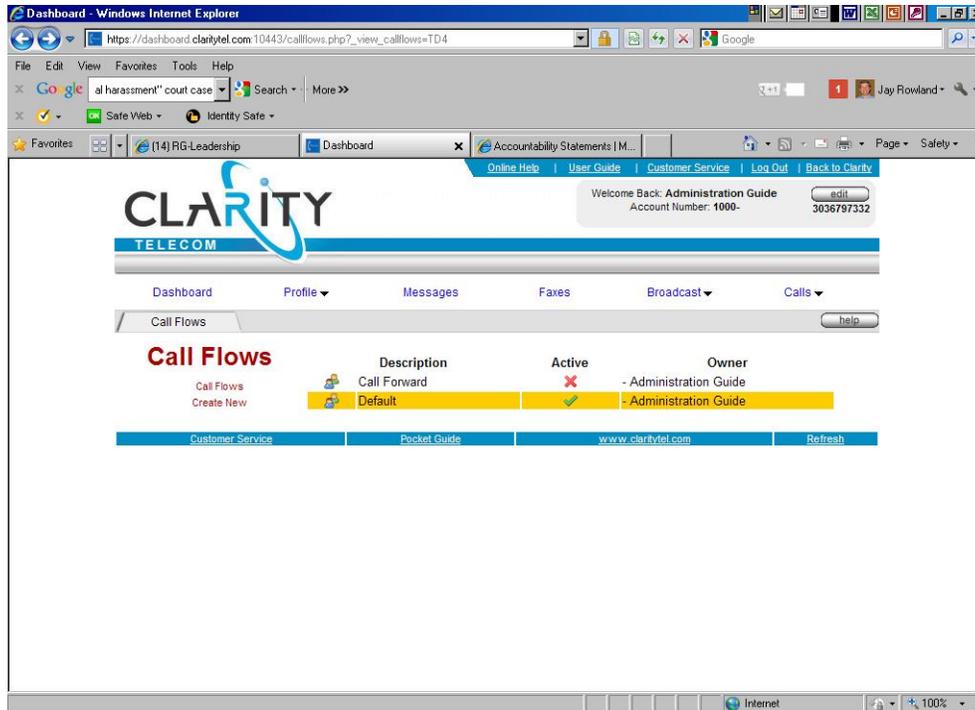
Later in these instructions, we will create “Auto Attendants” that assign recorded voice files to the specific extensions.

Please note that your services have been pre-configured by the Clarity System Administrator. Any changes will affect how your services function.

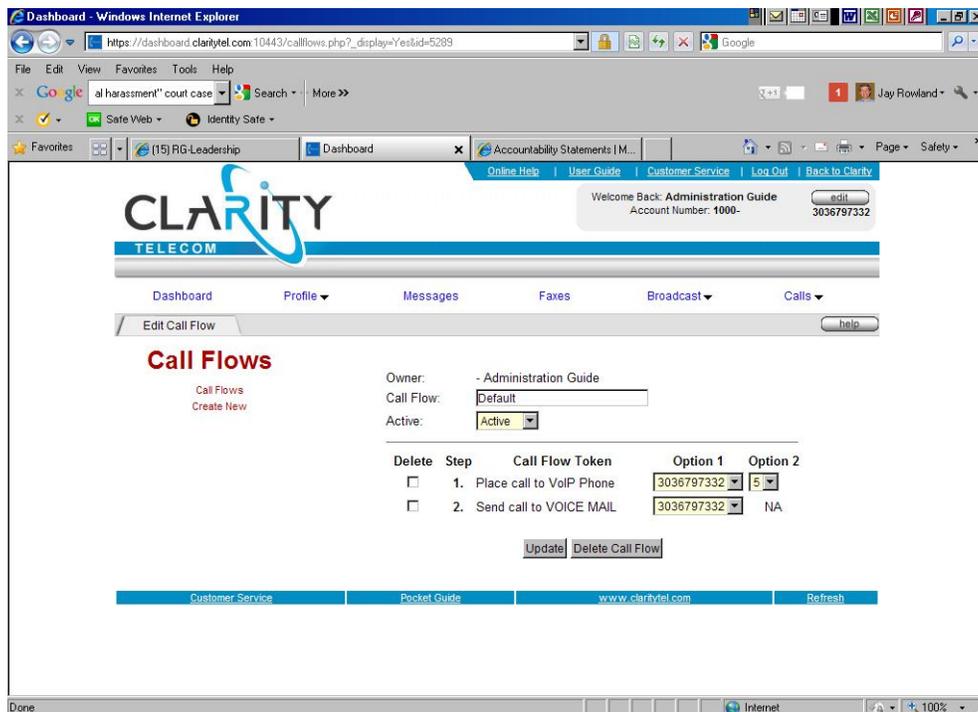
Step 34. To add or edit a call flow, move your mouse over Profile / PBX / Call Flows as shown below and Click.



Step 35. To view the Default Call Flow, click “Default,” as highlighted in yellow below.



You will see the following screen.



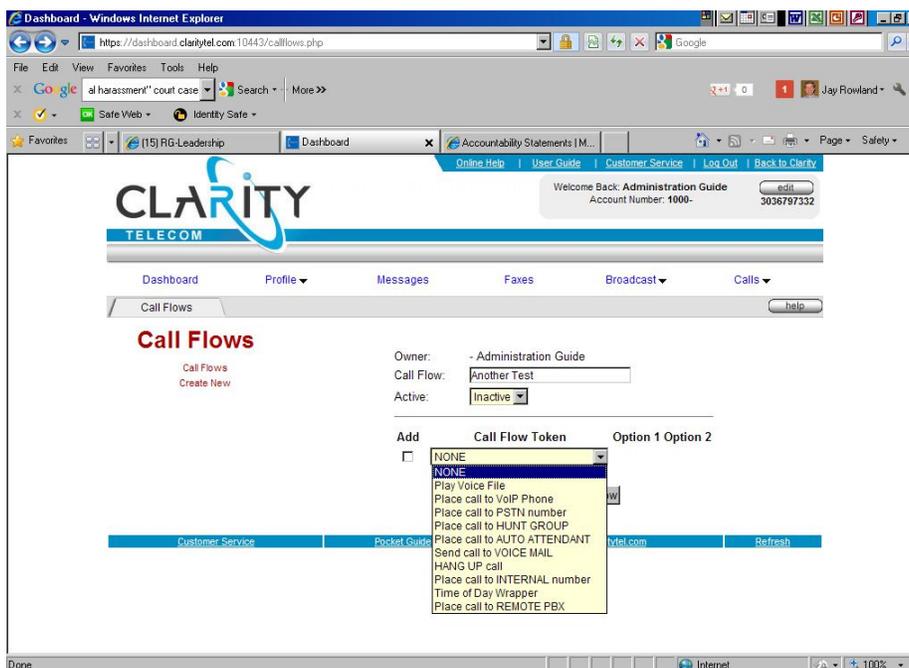
The Default Flow is set to first go to a VoIP phone and then, if there is no answer, send the call to voice mail. We would like for you to remember two rules:

1. Do **NOT** change the Default Call Flow. (Instead, you will create a new one.)
2. **NEVER** make a call flow “inactive.” Instead, you will make the call flow you choose to use “Active.” (If you accidentally inactivate all call flows, then your system will not work.)

Step 36. Click “Create New.”

Step 37. Type a Name for the call flow in the box. Be specific, so you remember the function of this call flow. Then click “Create.”

Step 38. Click the “Add” box and click on the “Call Flow Token” box, as shown below.



You will see ten options. Elsewhere in the instructions, these individual steps are referred to as “Triggers.” A “Trigger” may also be an entire Call Flow that combines several of these options in order to give your system better performance. Here are brief comments about each option.

Play Voice File – The file must already be recorded before you select it for this step. In the “Option 1” box, you will select the .wav file, then click “Update.”

Place Call to VoIP Phone – This is a good option for sending a call to someone who is out of the office, for example. Select any of your VoIP phone numbers from the “Option 1” box. Enter the number of rings allowed under “Option 2,” then click “Update.”

Place Call to PSTN number – Use this setting to send the call to any off-system, non-Clarity number. Under “Option 1,” enter the number to be called. Enter the number of rings allowed under “Option 2” and click “Update.”

Place Call to HUNT GROUP – A Hunt Group is a pre-defined order for the system to ring multiple numbers within your PBX account. If you have not already set up a Hunt Group, click “Update” and then the “Edit” button under “Option 2” to create a new Group. See Step 61 below.

Place Call to AUTO ATTENDANT – The call will go to a recorded greeting and allow the caller to choose among extensions. If you have not already set up an Auto Attendant, click “Update” and then the “Edit” button under “Option 2” to create a new Attendant. See Step 41 below. Note: If you send the call to an Auto Attendant, that will be the last step in this call flow. The call will not return.

Send Call to VOICE MAIL – Under “Option 1,” select the voice mail number to which the call will be routed. Note: If you send the call to Voice Mail, that will be the last step in this call flow.

HANG UP call – Note: If you instruct the call to Hang Up, that will be the last step in this call flow. The call will be terminated.

Place Call to INTERNAL number – This is a more permanent form of rerouting than “Place Call to VoIP Phone” (in that case, a busy signal will return the call to your own call flow). Under “Option 1,” enter the Clarity system number to be called, and *the call will be sent to that number’s Call Flow*. Enter the number of rings allowed under “Option 2” and click “Update.”

Time of Day Wrapper (ToD) – As explained in Step 70, the ToD Wrapper allows you to tie your Call Flow to days and times of day. Your choices are limited only by the number of minutes in the week, but the most common setting is day/night/weekend. If you have not already set up a Wrapper, click “Update” and then click the “Edit” button under “Option 2.”

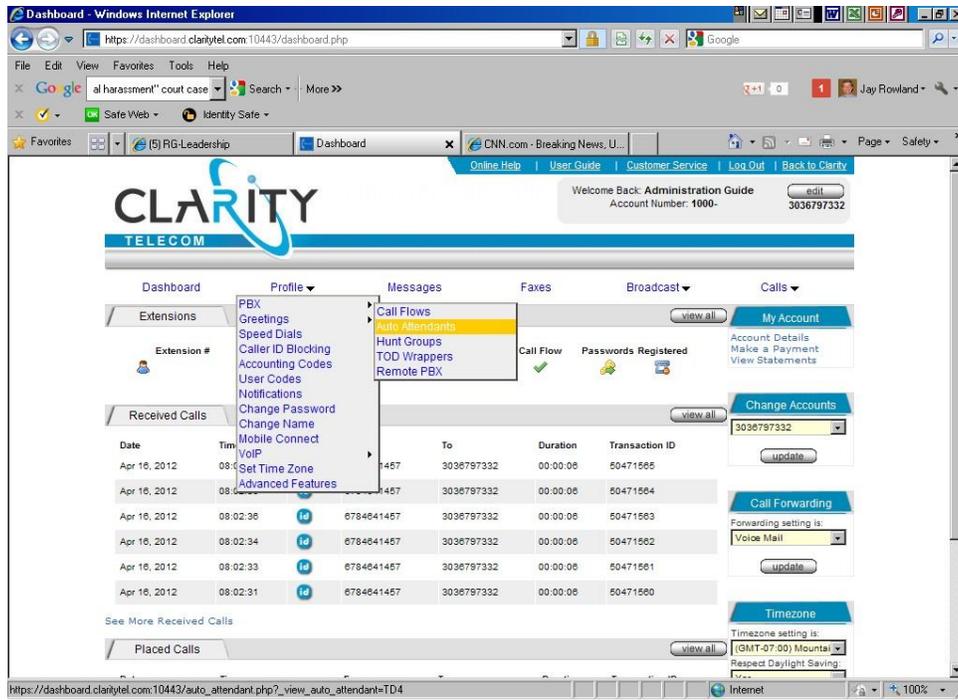
Place Call to REMOTE PBX – For Clarity administrative use only.

**Step 39. Repeat the last step, selecting more Call Flow Tokens, until your Call Flow is complete. Remember to click “Update.”**

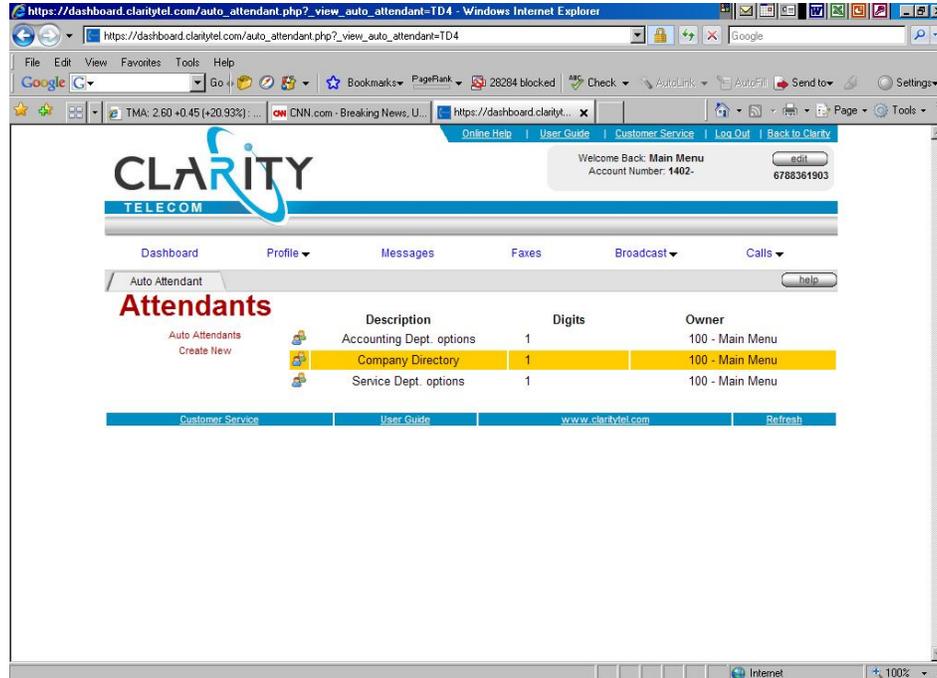
**Step 40. Make sure that your Call Flow is “Active.”**

### **To Activate Your Greetings and Auto Attendants**

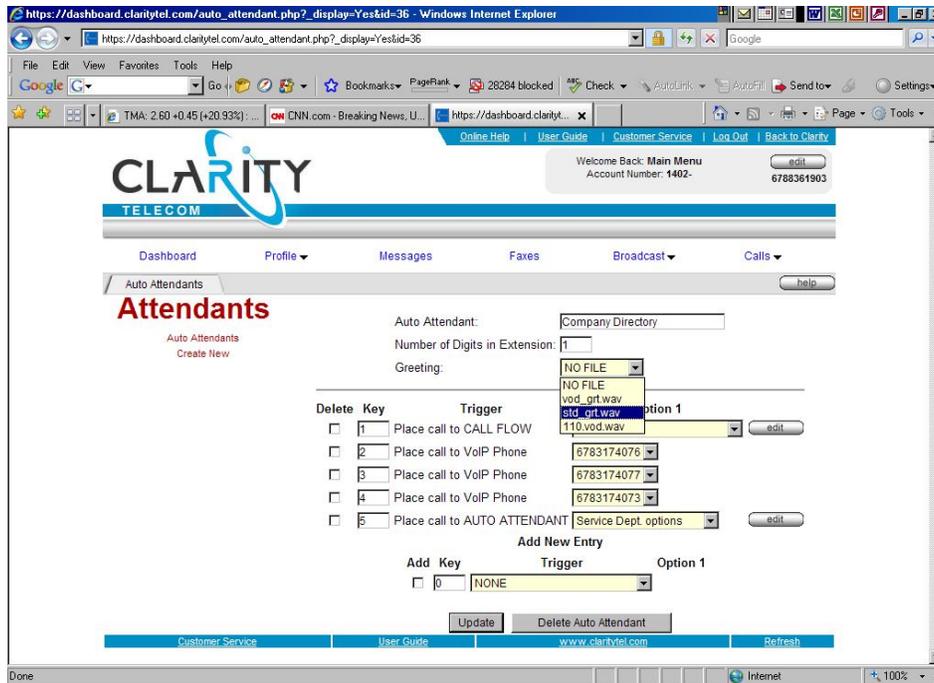
**Step 41. Place the mouse over Profile / PBX / Auto Attendants, as shown below. Click.**



Step 42. Click the “Company Directory” auto attendant, which is highlighted in yellow below. This is the main menu.



Step 43. In the dropdown box to the right of “Greeting,” select the voice file “std\_grt.wav”. This is the main menu that you recorded earlier.



Please note that your services have been pre-configured by the Clarity System Administrator. Any changes will affect how your services function. Plan carefully before you set up or alter Auto Attendants.

Step 44. Next to “Number of digits in Extension,” select the number of digits that must be entered in response to this auto-attendant. The digits must fit with the number(s) you tell callers to press during your voice file.

Step 45. Now you will define all of the options (key presses) for the main greeting. Click the “Add” checkbox.

Step 46. Enter a “Key” number(s).

Step 47. Select an action from the “Trigger” dropdown box that will happen when the key number is pressed. If you have set your Call Flows up properly, then the “triggers” you select will include Call Flows. Using a Call Flow allows you to utilize multiple steps within each key press option.

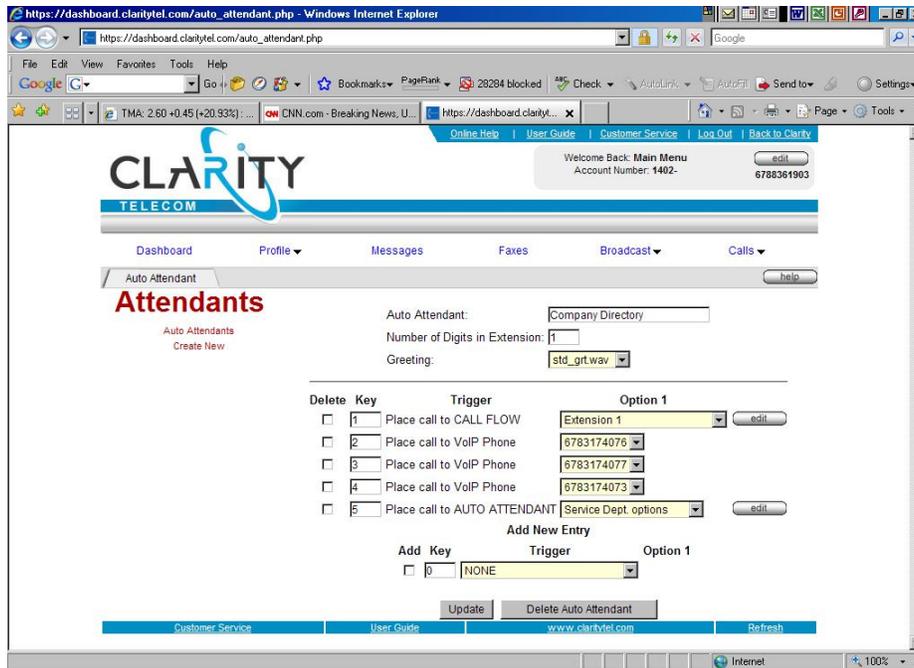
Note: If you intend to use the trigger “Play Voice File,” you must have recorded the file previously in order to select it.

Step 48. Select the destination of that trigger under “Option 1.”

Step 49. Repeat the above steps for each Key.

Step 50. Click “Update.” Your main greeting is now activated.

In the example below, callers will press one key to select an option during the main greeting. If they press 1, they will be routed to a CALL FLOW. If they press 2, 3, or 4, they will be sent to specific VoIP phones. If they press 5, they will be routed to the Service Department auto attendant (which is a sub-menu).



Next, you will activate your sub-menu (auto attendant) greetings.

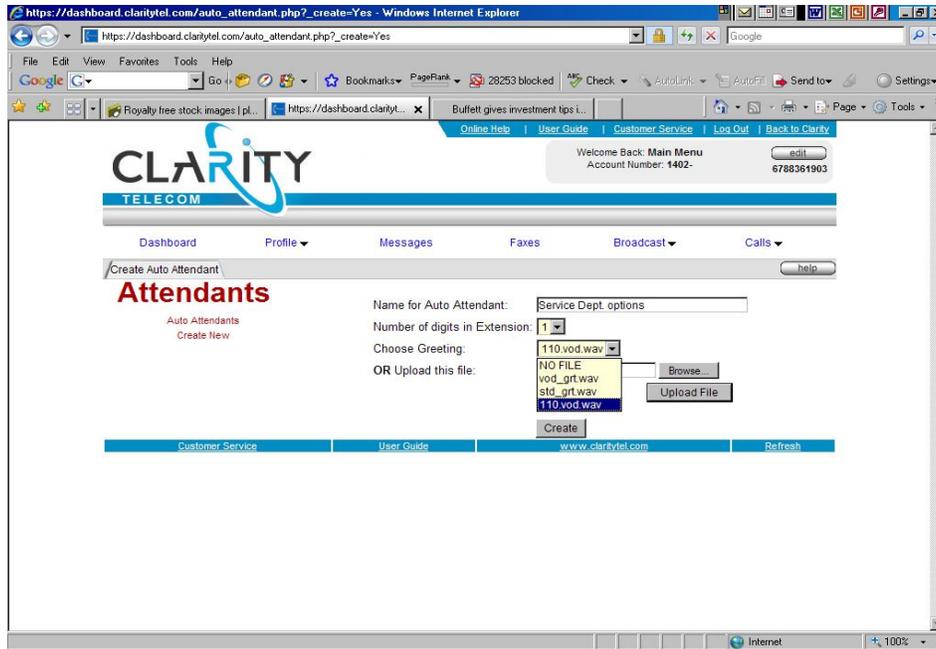
Step 51. Click “Create New” in the red links on the left side of the screen.

Step 52. Next to “Name for Auto Attendant,” type a description that includes the name of the directory/sub-menu to which this auto attendant applies. Be specific so you will remember what purpose this greeting serves.

Step 53. Next to “Number of digits in Extension,” select the number of digits that must be entered in response to this auto-attendant. The digits must fit with the number(s) you tell callers to press during your voice file. The system will wait for that number of key presses.

Step 54. Select the appropriate voice file in the dropdown box next to “Choose Greeting.” See below. Alternatively, you may browse and upload a voice file from your computer. You can upload voice files by placing your mouse pointer on **Profile**, scroll down and select **Greetings**. Any voice file you use must meet the following specs: .wav file; 8 bit; 11 kHz; mono; and its name must be less than 10 characters with no dashes or spaces.

In the example below, the Auto Attendant is named “Service Dept. options.” Callers will press one key to select an option during the greeting file named “110.vod.wav”.

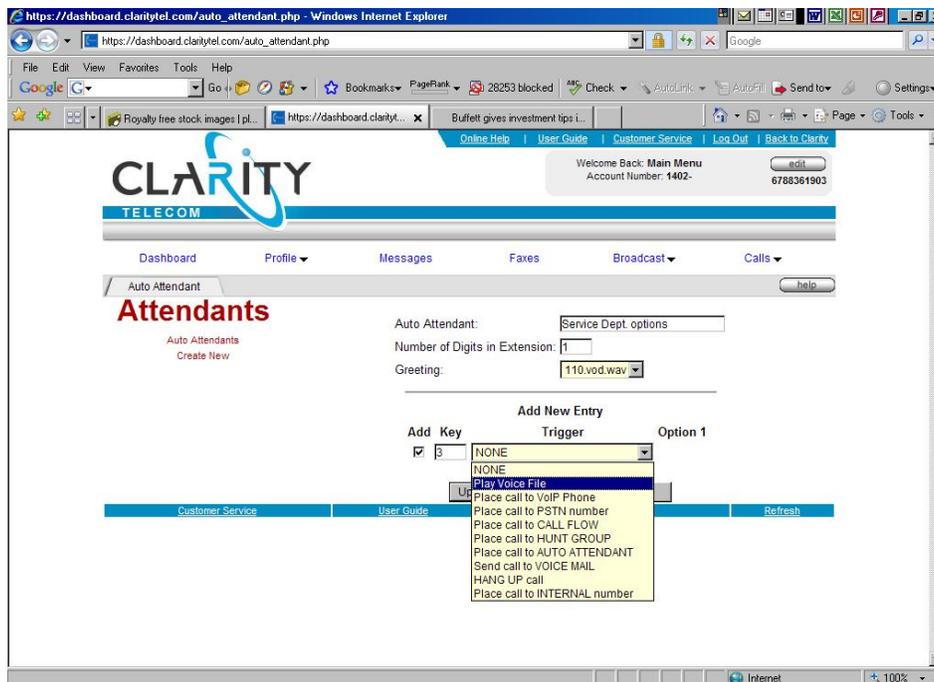


Step 55. Click the “Create” button.

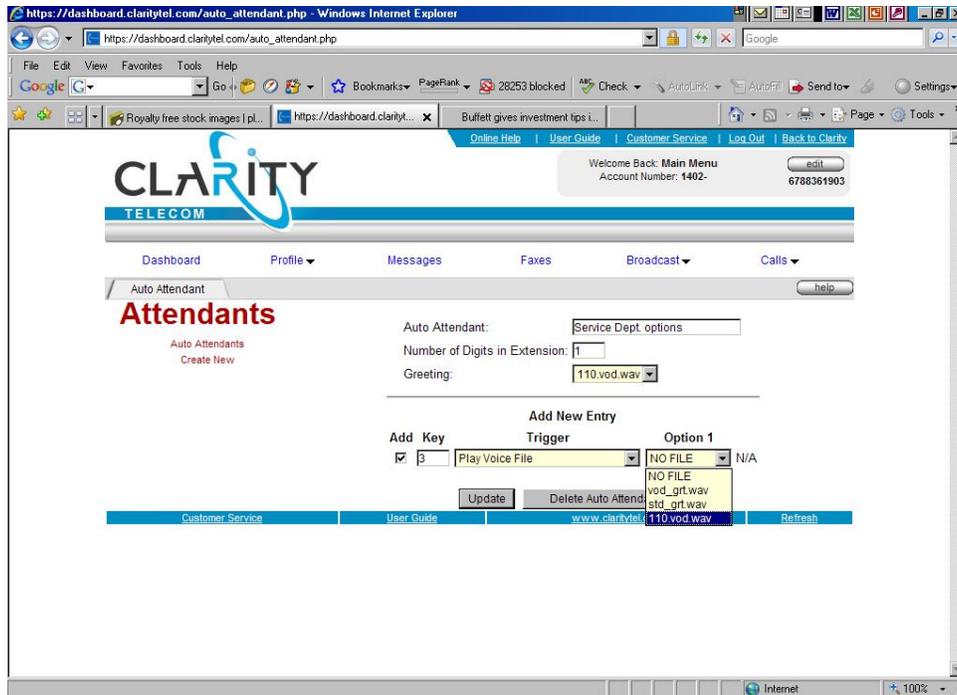
Step 56. Now you will define all of the options (key presses) for this auto attendant (sub-menu). Click the “Add” checkbox.

Step 57. Enter a “Key” number.

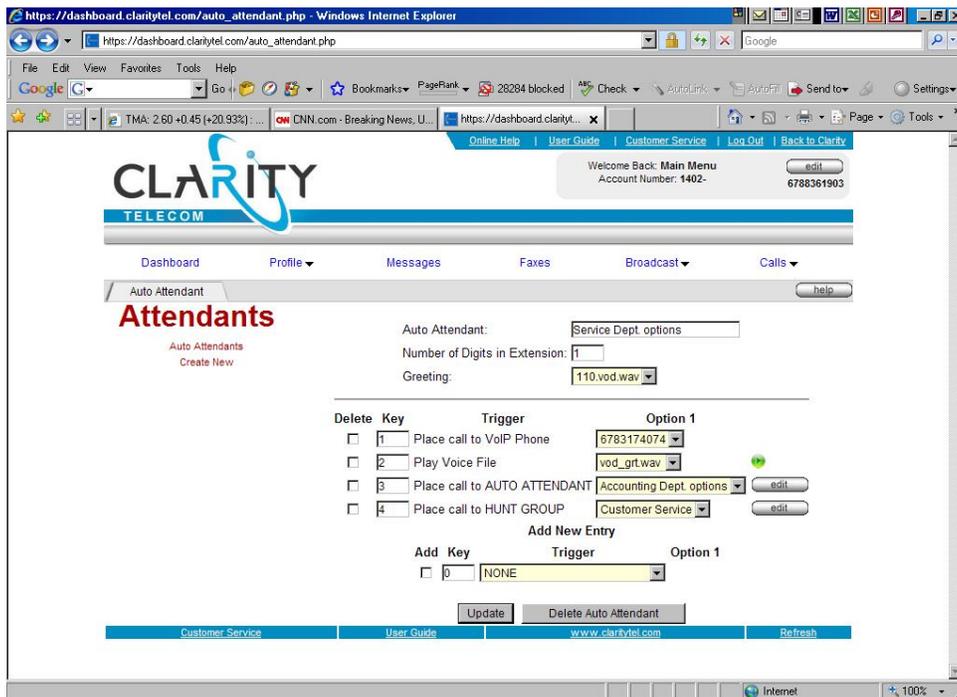
Step 58. Select an action from the “Trigger” dropdown box that will happen when the key number is pressed.



Step 59. Select the destination of that trigger under “Option 1.” See below.



Step 60. Click **“Update.”** In the example below, callers may press one digit (1, 2, 3, or 4) during the “Service Dept. options” auto attendant greeting. If they press 1, they will be routed to a VoIP phone. If they press 2, they will be routed to a voice file. If they press 3, they will be routed to the “Accounting Dept. options” auto attendant. If they press 4, they will be routed to a Hunt Group, which will be explained next.



## To Modify Call Flows with Hunt Groups and ToD Wrappers

Call Flows define the proper direction and termination of incoming calls. Please note that your services have been pre-configured by the system administrator. Any changes will affect how your services function. Plan carefully before you set up or alter Call Flows.

Step 61. **To define or change Hunt Groups, click on Profile / PBX / Hunt Groups.** A Hunt Group is a pre-defined order for the system to ring multiple numbers within your PBX account.

Step 62. **Click “Create New” in the red links on the right.**

Step 63. **To define a new Hunt Group, enter a description that includes the menu to which the hunt group pertains.** Remember to be specific.

Step 64. **Select a “Hunt Order,” as shown below.** Your choices include:

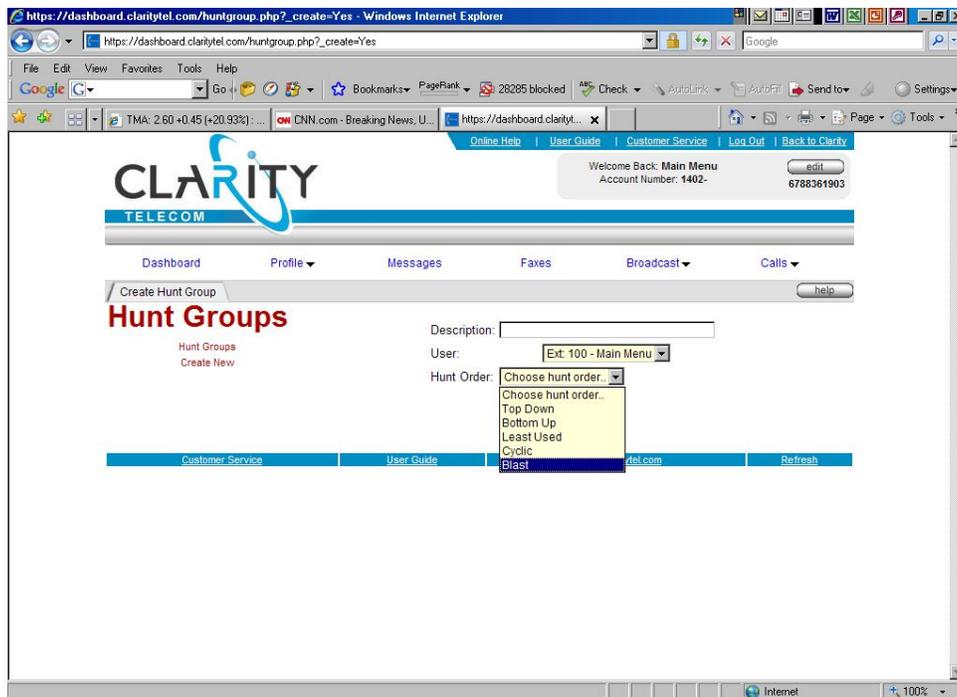
Top Down – A call will be sent to the first extension listed, then to the second, etc.

Bottom Up – A call will be sent to the last extension listed, then next to last, etc.

Least Used – The call will be sent first to the least used extension.

Cyclic – Calls will rotate through the given extensions.

Blast – The call will be sent to multiple extensions at once.



Step 65. **Click the “Create” button.**

Step 66. **Click the “Add” box, select a phone type, a number, and the number of rings.**

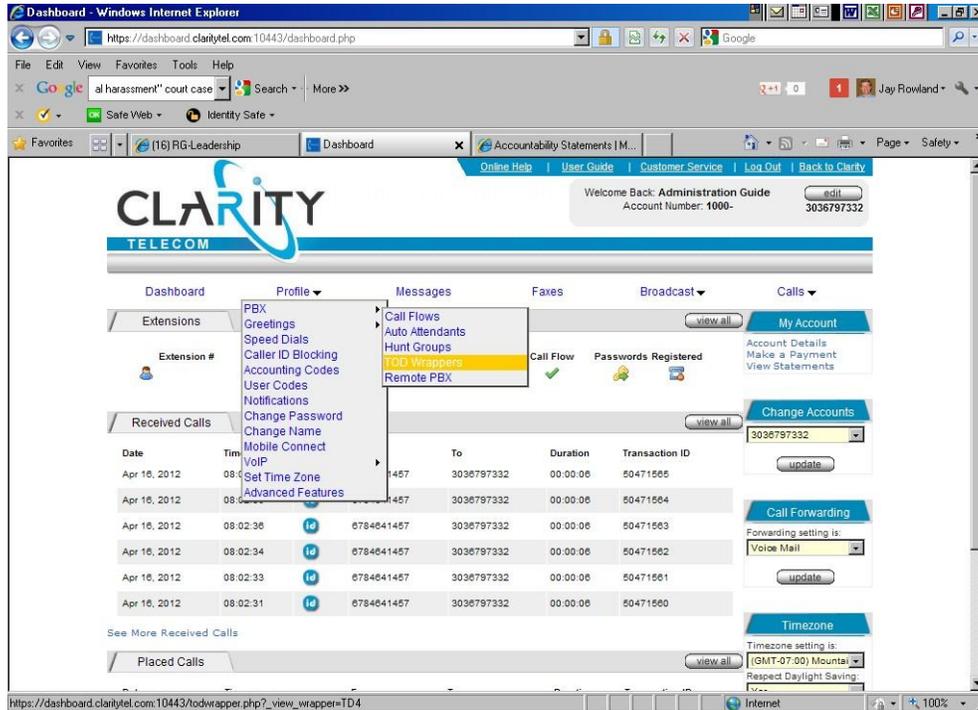
Step 67. “RNA” means Ring No Answer. **Select “Next” you want the call to go to the next step in the Call Flow if the call is not answered.** If you select “Exit,” an unanswered call will leave the system. Normally, you will NOT want to exit.

Step 68. **Click “Update.”**

Step 69. **Repeat the three steps above for each number you want to include in this hunt**

group.

Step 70. **To define or change the Time of Day Wrapper, click on Profile / PBX / ToD Wrappers**, as shown below. The ToD Wrapper allows you to tie your Call Flow to days and times of day. Your choices are limited only by the number of minutes in the week, but the most common setting is day/night/weekend.



Step 71. **Click “Create New.”**

Step 72. **Enter a Name for this Wrapper, then click “Create.”** Be specific with the name.

Step 73. **Click the “Add” box and then click the box that contains the days.** At the bottom of the list, you will notice longer timeframes such as Weekdays, Weekends, and Everyday. Our system assumes the wider timeframe first (Everyday). Then, as you select days and times of day, those selections override the wider settings. For example, most users first select “Everyday” and pair it with their After Hours greeting. Then they select “Weekdays” and pair that with their Work Hours greeting. Thus, calls placed during work hours will receive the appropriate message. Note: You do not need to enter Start or Stop times for Everyday.

Step 74. **Enter Start and Stop times (using 24-hour time).**

Step 75. **Assign a Call Flow and click “Update.”** If you have not yet set up a Call Flow, you may click the “Edit” button to do so.

Step 76. **Repeat the previous three steps for as many timeframes as you need to add.**

**Final Step. Test what you have done to make sure it functions properly!**

**Congratulations! You have now configured your PBX Directory.**

To check Call Details or learn more about other system functions, please refer to the VoiceConnect or Clarity web access manuals for further instructions.