



DirectoryPro
Setup Guide

Schmooze[®]
Schmooze Com Inc.



Chapters

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Overview

The Directory module allows you to create one or more company directories of extensions. You can then route calls to the directory and allow them to search by the user's name to be connected with the party they are looking for.



Logging in

Log into the Directory module and you will see this screen:

On the right side you will see a list of directory groups that have been created along with the ability to create new directory groups.

Directory

Add a new Directory

Add Directory

Main

Tony

Directory Options

Default Directory ?

Main

Submit

You can also select from the drop down which directory will be your default directory. Setting a directory to be default allows you to automatically include a new extension in the directory when creating a new extension on your PBX.

Directory Options

Default Directory ?

Main

Creating a Directory

In our example we are going to create a new “Everyone” directory by clicking on the “Add Directory” option.

• Directory General Options

- **Directory Name**- Choose a name for this directory, such as “Everyone”.
- **Directory Description**- Here you can optionally set a description for this directory.
- **Callerid Name Prefix**- If you want to prefix the caller ID that is sent to your phone when someone dials thru the directory you can set it here. We will prefix the caller ID with “Dir-”, that way we know anytime someone dials our extension from the directory.
- **Alert Info**- (For phones that support Alert Info) To change the ring cadence you can set it here. In our example we are setting the alert info to “<Bellcore-dr3>” which will change the cadence on your Aastra phone to a different cadence. Based on the ring we can tell if the call came from the directory.



- Directory General Options

Directory Name 	<input type="text" value="Everyone"/>
Directory Description 	<input type="text" value="Default Everyone Group"/>
CallerID Name Prefix 	<input type="text" value="Dir-"/>
Alert Info 	<input type="text" value="<Bellcore-dr3>"/>

• Directory Options (DTMF)

- **Announcement**- Here we pick which recording we want played to the caller when they enter the directory. This can be any system recording you have defined in the System Recording module. The default included recording is to inform the caller to start entering the first or last name of the person they are looking for.
- **Invalid Retries**- How many times a caller is allowed to enter a name without finding a match before we send the caller to the Invalid Destination as defined below.
- **Invalid Retry Recording**- Here we pick which recording we want played to the caller when they enter a invalid match. This can be any system recording that you have defined in the System Recording module. The default included recording is to inform the caller we did not find a match and to please try again.
- **Invalid Recording**- Here we pick which recording we want played to the caller when they have met the Invalid Retry recount as defined above. This can be any system recording defined in the System Recording module. The default included recording is to inform the caller we cannot find any matches and to please wait while their call is being transferred . The call will then be transferred to the Invalid Destination as defined below.
- **Invalid Destination**- If a caller cannot find a match after exceeding the Invalid Retries as defined above this is where the call is transfered. In our example we are sending the caller to the general voicemail.
- **Return to IVR**- If the caller came from an IVR and you select this option, the Invalid Destination for that caller will be to send them back to the IVR they came from and not the Invalid Destination as defined.
- **Announce Extension**- This option allows you to choose if the extension number is played for the extension the call is being transferred to. If you do not check this it will play the user's voicemail greeting name. If you check this, it will play their extension number.



- Directory Options (DTMF)

Announcement ?	Default	
Invalid Retries ?	2	
Invalid Retry Recording ?	Default	
Invalid Recording ?	Default	
Invalid Destination ?	Voicemail	<3001> (General VM) (unavail)
Return to IVR ?	<input checked="" type="checkbox"/>	
Announce Extension ?	<input checked="" type="checkbox"/>	

- **Directory Options (Speech)**- These are the Directory options for the speech recognition version of the directory.
 - **Speech Enabled**- Check this option if you want to enable speech recognition on this directory. Please note you will also need a valid LumenVox Speech port.
 - **Announcement**- Here we pick which recording we want played to the caller when they enter the Directory. This can be any system recording you have defined in the System Recording module. The default included recording is to instruct the caller to say the party's name or start entering the first or last name of the person they are looking for.
 - **Invalid Retries**- How many times a caller is allowed to enter a name without finding a match before we send the caller to the Invalid Destination as defined below.
 - **Invalid Retry Recording**- Here we pick which recording we want played to the caller when they enter an invalid match. This can be any system recording you have defined in the System Recording module. The default included recording is to inform the caller we did not find a match and to please try again.
 - **Invalid Recording**- Here we pick which recording we want played to the caller when they have met the Invalid Retry recount as defined above. This can be any system recording you have defined in the System Recording module. The default included recording is to inform the caller we cannot find any matches and their call is now being transferred and to please wait. The call will then be transferred to the Invalid Destination as defined below.



- **Invalid Destination**- If a caller cannot find a match after exceeding the Invalid Retries as defined above this is where the call is transferred. In our example we are sending the caller to the same directory but only with DTMF. This will disable speech recognition and only play the announcements based on the DTMF options as defined above. This is how we recommend sending up the speech portion of your directory so you do not leave people locked into speech only if they are having problems.
- **Announce Extension**- This option allows you to choose if we find a match for the person they are looking for, if the extension number the call is being transferred. If you do not check this it will play the user's voicemail greeting name. If you check this, it will play their extension number.

- Directory Pro Options (SPEECH)

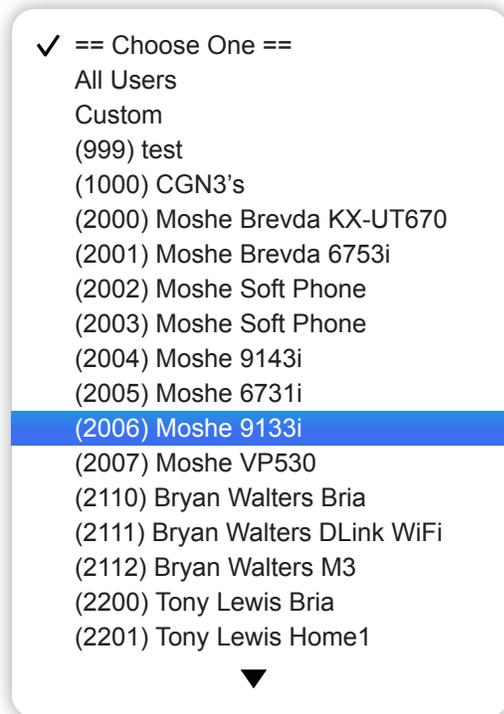
Speech Enabled 	<input checked="" type="checkbox"/>
Announcement 	Default 
Invalid Retries 	2 
Invalid Retry Recording 	Default 
Invalid Recording 	Default 
Invalid Destination 	Directory  ThisDirectory (DTMF) 
Announce Extension 	<input checked="" type="checkbox"/>

- **Directory Entries**- Here is where we define what extensions are in the directory.
 - **Name**- The name of the user. This is what is used when matching the DTMF entries when using the DTMF portion of the directory.
 - **Name Announcement**- What to play to the caller to confirm the match we found for them. The default is to use the voicemail greeting but if this user does not have voicemail or you do not want to use the voicemail greeting name, you can choose this here.
 - **System Recording**- You can pick any of your system recordings on your PBX.
 - **Spell Name**- This will have the system spell the name one letter at a time.
 - **Text to Speech**- This will have the system use a computer generated Text to Speech engine to play the name.
 - **Dial**- This is the actual number to dial for this match. It is usually the extension number of the user but could be changed to be any other extension or even an external number.
 - **Speech Grammars**- If you have enabled the speech recognition portion of the directory this is where we define what names or grammars a caller can say to match to this



extension. In our example, they can say “Tony” or “Tony Lewis”.

To add more entries in the directory press the “Green Plus” icon at the bottom of your list. From the drop down you can then choose



- **Any Individual Extension**- You will see a list of all extensions on your system and you can pick anyone of them to add to your directory.
- **All Users**- This will add all extensions to your directory. You can then edit or delete any entries before saving.
- **Custom**- You can add your own custom entries by defining the name, announcement, dial and grammars.

Tips and Tricks



Why are some entries grayed out and some are not?



Any entry that was mapped to an extension on the system which has not been modified in the Directory Entry section will be gray. This informs you



that that entry is linked to that user's extension so if you delete the extension or modify the name of that extension, it will update the directory automatically for you.

You will also see a small person icon next to the delete button informing you this entry is linked to that extension and if you click on the icon, it will take you to that user's extension page.

A good example of this is when someone uses the directory to dial the CEO have the extension dialed be the CEO's assistant to screen the calls. To do this you would add the CEO's extension to the directory then in the dial field change the extension for their extension to their assistant extension.



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