



cloudUC

Schedule Admin

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## Description

Schedules are used to route calls based upon days of the week, hours of the day or specific calendar events. Once schedules are created, they are applied to various components of cloudUC such as Hunt Groups and Auto Attendants. For example, the main company number could be directed to a Hunt Group which has a schedule applied to it that directs calls to ring the Hunt Group members during normal business hours, but alternatively route callers to the Auto Attendant during closed hours and/or during holidays.

## CAP Schedule Admin

Schedule admin is within the CAP at <https://clouduc.nctc.com>

You will be required to login with appropriate credentials to administer your cloudUC settings. If you do not have admin credentials, please consult your system administrator or contact NCTC for assistance. If you have forgotten your password, use the “Forgot Username and/or Password” link located on the CAP login screen.

Once you are logged into the CAP, expand the Enterprise Services menu item in the left pane by clicking it. Once expanded, click Schedules to select it.

## Understanding Schedules

Schedules are defined as either Location schedules or Global schedules. You may find existing schedules under either category depending on the manner in which they were created. Location schedules are created and used for a specific Location (customers with multiple physical offices/locations) where Global schedules can be used for any location. The functionality of Location and Global schedules are the same, the only difference is if they are intended to be used for only a specific location or used globally.

Before adding or modifying a schedule, it is important to understand how a schedule interacts with inbound calls.

## Virtual Numbers / Main Company Number

Every cloudUC account includes a Main Company Number at no charge. This is a number that is not a DID for a user and is typically a company’s main published telephone number. If required or desired, additional Virtual Numbers may be purchased for a monthly fee. Both Main Company Numbers and Virtual Numbers must be pointed to something, typically this will be a Hunt Group or an Auto Attendant. To view your Main Company Number and any Virtual Numbers that you may have, in the CAP, navigate

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to Enterprise Services>>Virtual/Toll Free Numbers. In this table, a list will be displayed showing your Main Company Number and any Virtual Numbers that you may have. Note that NCTC does not provide Toll Free Numbers within cloudUC.

Virtual / Toll Free Numbers	Assigned services	Extension / Phone Number	Location	Action
(615) 688-9001 - Company Main Number	Auto Attendant NCTC Basic AA	7777	-	

Showing 1 to 1 of 1 entries

View 10 | First | Previous | 1 | Next | Last

**Figure 1 Virtual/Toll Free Numbers**

In the example above, a single Main Company Number appears with a telephone number of 615-688-9001, it is currently assigned to ring Auto Attendant NCTC Basic AA which has an extension of 7777.

In the example shown, a schedule was desired, I would apply a schedule to Auto Attendant 7777. A number doesn't have to be pointed to an Auto Attendant however, it could also be pointed to a Hunt Group where a schedules could be applied.

## Hunt Group

When a virtual number or main company number is pointed to a hunt group, you can then apply schedules to that hunt group to control the call routing behavior.

Go locate Hunt Groups, navigate to Enterprise Services>>Hunt Groups

## Auto Attendant

Just as with a Hunt Group, when a virtual number or main company number is pointed to an Auto Attendant, you can then apply schedules to that Auto Attendant to control the call routing behavior.

## Examples Call Routing with a Schedule

In this example, all inbound calls to 615-688-9001 are to ring all phones Monday through Friday from 8:00am until 4:30pm. During closed hours and on holidays, calls should ring to an Auto Attendant.

In this case, I could point 615-688-9001 to a Hunt Group and then apply schedules to that Hunt Group, in this example we will use Hunt Group 6666, named Operator Hunt which rings all phones.

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The screenshot shows the NCTC cloudUC Customer Administration Portal. The user is Chris Carlyle. The page is titled "Virtual / Toll Free Numbers" under the "Enterprise Services" menu. A table displays the assignment for the number (615) 688-9001, which is assigned to the Hunt Group Operator HG 6666. The table has columns for "Virtual / Toll Free Numbers", "Assigned services", "Extension / Phone Number", "Location", and "Action".

Virtual / Toll Free Numbers	Assigned services	Extension / Phone Number	Location	Action
(615) 688-9001 - Company Main Number	Hunt Group Operator HG	6666	-	

Figure 2 Virtual Number Assignment

In the above screenshot, 615-688-9001 is assigned to ring Hunt Group Operator HG 6666 (Enterprise Services>>Virtual/Toll Free Numbers)

The screenshot shows the NCTC cloudUC Customer Administration Portal. The user is Chris Carlyle. The page is titled "Hunt Groups" under the "Enterprise Services" menu. A table displays a list of Hunt Groups. A red arrow points from the "Operator HG" row to the "Virtual / Toll Free Number" column, specifically to the value (615) 688-9001.

Name	Caller ID	Extension	Virtual / Toll Free Number	Action
Operator HG	Operator HG	6666	(615) 688-9001	
NCTC Billing HG	NCTC Billing HG	6669	None	
NCTC Support HG	NCTC Support HG	6668	None	
NCTC Bowling Green	NCTC Bowling Green	6998	(270) 936-7444	
NCTC Sales HG	NCTC Sales HG	6667	None	
Operator Hunt Group	Operator HG	6670	None	

Figure 3 Hunt Group Overview

In the above screenshot, Hunt Group 6666, named Operator Hunt Group has 615-688-9001 assigned to it.

To modify this Hunt Group, in this case to apply a schedule, click the green edit button to the right of the Hunt Group desired.

After creating a schedule or set of schedules, I can then come back to this Hunt Group and apply the schedules and define the routing that I wish to be applied based upon the schedule(s) assigned.

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## Viewing/Adding/Modifying Schedules

To view, add or modify a schedule, navigate to Enterprise Services>>Schedules

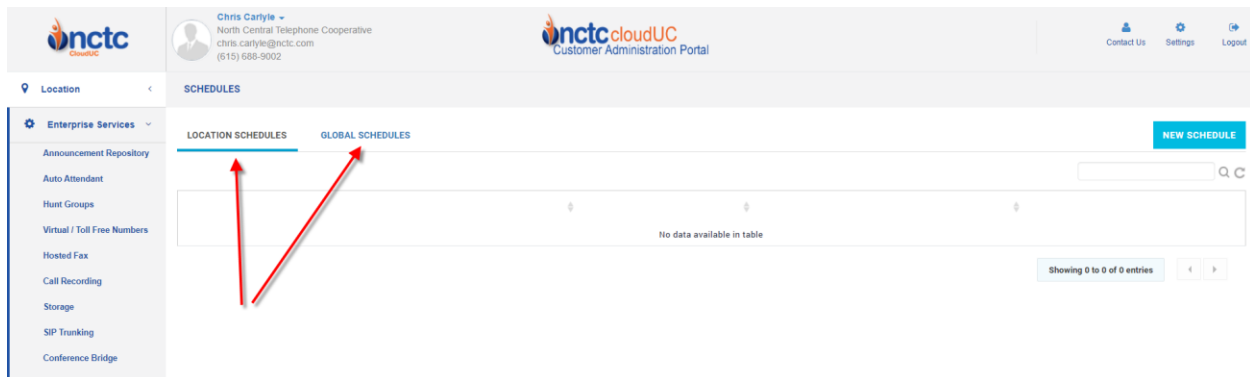


Figure 4 Schedules

You will note that there are 2 tabs across the top, one for Location Schedules and one for Global Schedules. In this example, there are no Location Schedules so I will select Global Schedules. As previously stated, schedules can be created specific to a location if your cloudUC service spans multiple physical installation locations or you can simply use Global Schedules which can be applied to any Location.

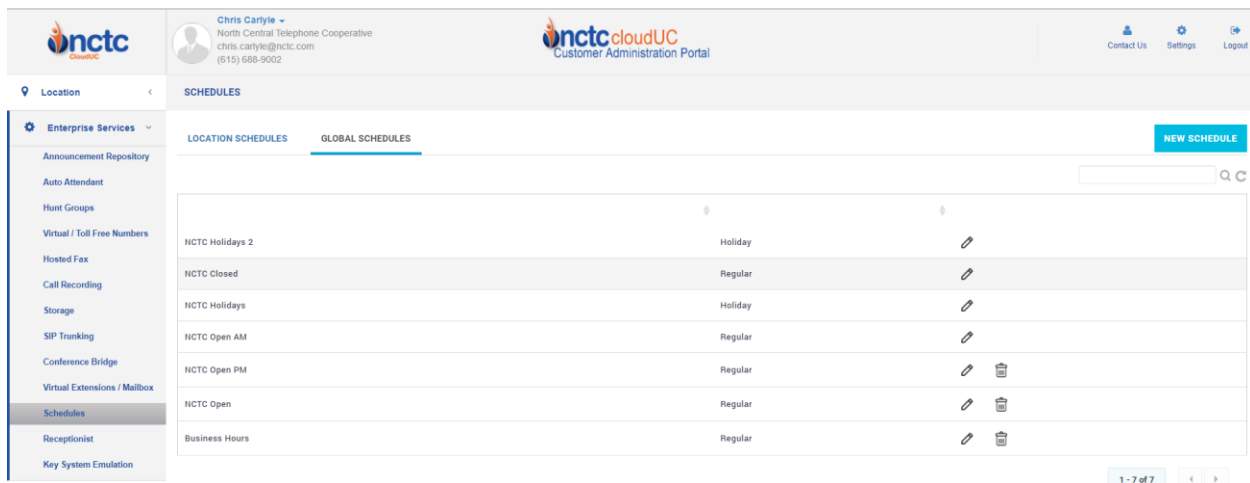


Figure 5 Global Schedules

Now that Global Schedules has been selected, all existing schedules are displayed. From here, I can modify an existing schedule or create a new one.

## Add a New Schedule

To add a schedule, select the New Schedule button. If you are adding specific dates/times to an existing schedule, do not add a new one, and instead simply modify the existing schedule. Note that if you create a new schedule, that schedule will need to be added to the Hunt Group or Auto Attendant in order for it to apply. Instructions for modifying an existing schedule is in the next section of this guide.

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To add a schedule, click the New Schedule button

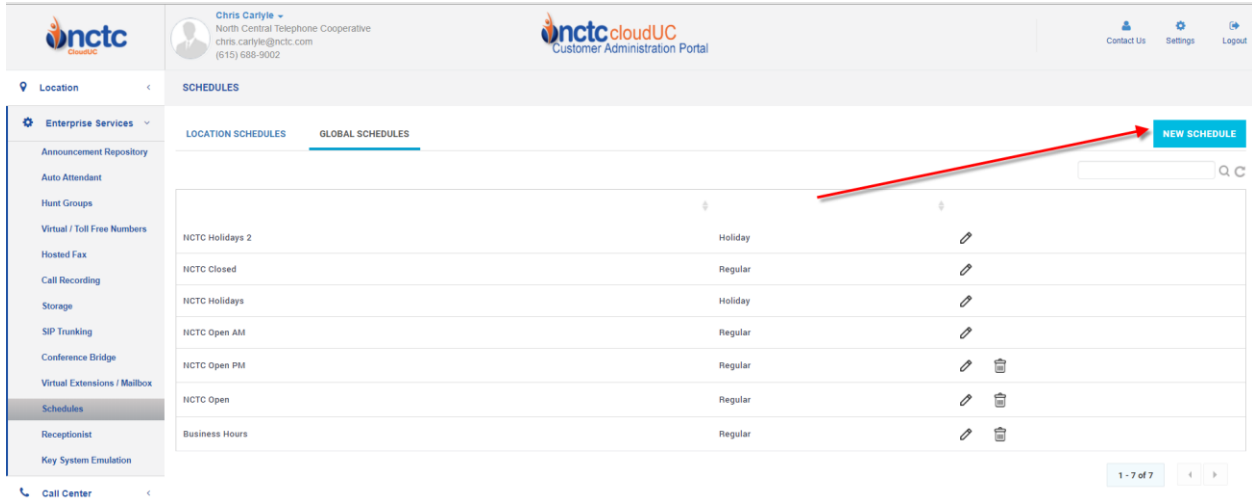


Figure 6 New Schedule

The New Schedule dialog will be displayed

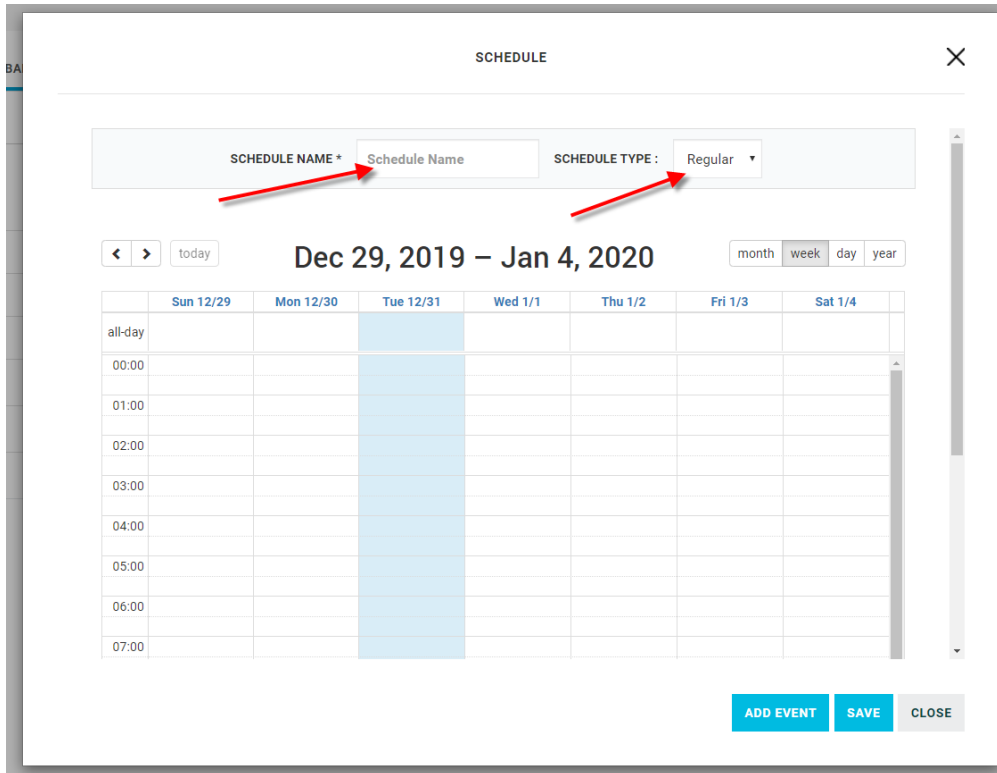


Figure 7 New Schedule Dialog

Type in a unique name for the schedule in the Schedule Name field and select the schedule type. Valid choices are Regular or Holiday.

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Regular schedules allow for recurring times/days of the week where a Holiday schedule will allow specific dates to be included. Note that a single schedule can contain multiple events. For example, you could create a single holiday schedule that contains multiple holiday events. Similarly in a regular schedule you can have multiple days of the week/times of day in a single regular schedule if desired.

Once you have defined the schedule name and the schedule type, you can now proceed to add events to this schedule. For this example, we are going to create a new schedule named Closed Company Meetings. A use case for this schedule may be that my company is closed every Monday morning from 8:00am till 9:00am for a regular staff meeting.

The screenshot displays the 'SCHEDULE' configuration page. At the top, the title 'SCHEDULE' is centered, and a close button 'X' is in the top right corner. Below the title, there are two input fields: 'SCHEDULE NAME \*' containing 'Closed Company Meetings' and 'SCHEDULE TYPE:' with a dropdown menu set to 'Regular'. Two red arrows point to these fields. Below the name and type fields, there is a date range selector showing 'Dec 29, 2019 – Jan 4, 2020' with navigation arrows and a 'today' button. To the right of the date range are tabs for 'month', 'week', 'day', and 'year'. The main area is a calendar grid with columns for 'Sun 12/29', 'Mon 12/30', 'Tue 12/31', 'Wed 1/1', 'Thu 1/2', 'Fri 1/3', and 'Sat 1/4'. The 'Tue 12/31' column is highlighted in light blue. The rows represent time slots from 'all-day' down to '07:00'. At the bottom right, there are three buttons: 'ADD EVENT' (blue), 'SAVE' (blue), and 'CLOSE' (grey).

Figure 8 Closed Company Meetings Example

Next click Add Event

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NEW EVENT

DESCRIPTION: Every Monday 8a-9a

REPEAT EVENT:  ENABLE

DAILY  
 WEEKLY  
 MONTHLY  
 YEARLY

REPEAT EVERY: 1 WEEK NEXT DAYS

SUN MON TUE WED THU FRI SAT

NO END DATE  
 END BY

[Calendar icon]

FULL DAY

CANCEL SAVE

Figure 9 New Event

1. In the Description field, define a unique description for the event
2. Select the appropriate setting for Repeat Event, Enable or Disable
3. Select how often recurrence frequency for the event, Daily, Weekly, Monthly or Yearly
4. Select the frequency of Repetition in the Repeat Very x Week Next Days
5. Highlight Blue the days of the week that you wish the event to apply
6. Select the End Date when this event may expire or select No End Date
7. If the event is to include the entire 24 hour period for the day(s) configured, select Full Day otherwise leave it unselected.
8. Scroll down to view additional options if applicable.

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NEW EVENT

DAILY  
 WEEKLY  
 MONTHLY  
 YEARLY

REPEAT EVERY 1 WEEK NEXT DAYS

SUN MON TUE WED THU FRI SAT

NO END DATE  
 END BY

[Calendar Icon]

FULL DAY

08 : 00 - 12-31-2019 [Calendar Icon] -- 09 : 00 -  
12-31-2019 [Calendar Icon]

CANCEL SAVE

Figure 10 Start/Stop Time and Date

If Full Day has been deselected, additional options will be displayed to allow you to define during what times this event should apply and on which date this event should be applicable.

In the example above, to match every Monday from 8:00am until 9:00am, the event should be configured as shown.

Click Save when the event is complete.

Once the event has been saved, your new schedule will be displayed. Using the scroll buttons, go to the next occurrence of the newly added event and you should see it indicated on the calendar as being including in the schedule.

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The screenshot displays the 'SCHEDULE' admin interface. At the top, the title 'SCHEDULE' is centered, with a close icon (X) in the upper right corner. Below the title, there are two input fields: 'SCHEDULE NAME \*' containing 'Closed Company Meetings' and 'SCHEDULE TYPE:' with a dropdown menu set to 'Regular'. A navigation bar shows 'today' and a date range 'Jan 5 - 11, 2020' with tabs for 'month', 'week', 'day', and 'year'. The main area is a calendar grid with columns for days from Sunday 1/5 to Saturday 1/11 and rows for times from 04:00 to 11:00. A blue event box labeled 'Every Monday 8a-9a' is positioned on the Monday 1/6 column between 8:00 and 9:00, with a red arrow pointing to it. At the bottom right, there are three buttons: 'ADD EVENT' (blue), 'SAVE' (blue), and 'CLOSE' (grey).

**Figure 11 Event within Schedule**

You can add additional events to this schedule if applicable by clicking the Add Event button or if there are no additional events required such in this case, click the Save button then close the schedule by clicking the X icon in the upper right hand corner of the schedule window or by clicking the Close button. Don't forget to click Save before closing or your changes will be lost.

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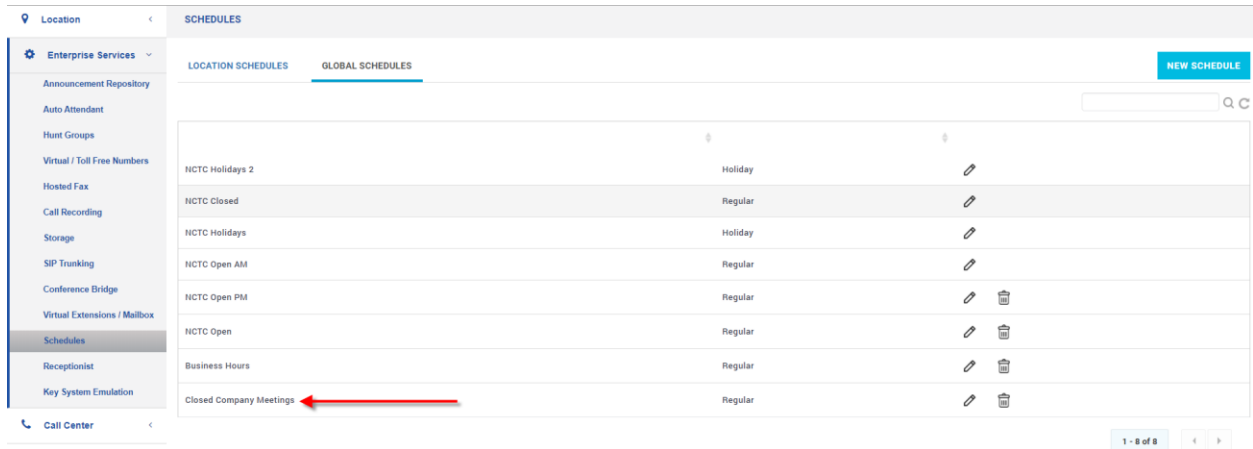


Figure 12 New Schedule in Schedule View

We can now see our new schedule named “Closed Company Meetings” displayed in the schedule list.

## Editing an Existing Schedule

In this example we will modify an existing schedule, this time we will modify the NCTC Holidays schedule.

To edit, find the schedule in the list then click the Edit button to the far right of the schedule you desire to change.

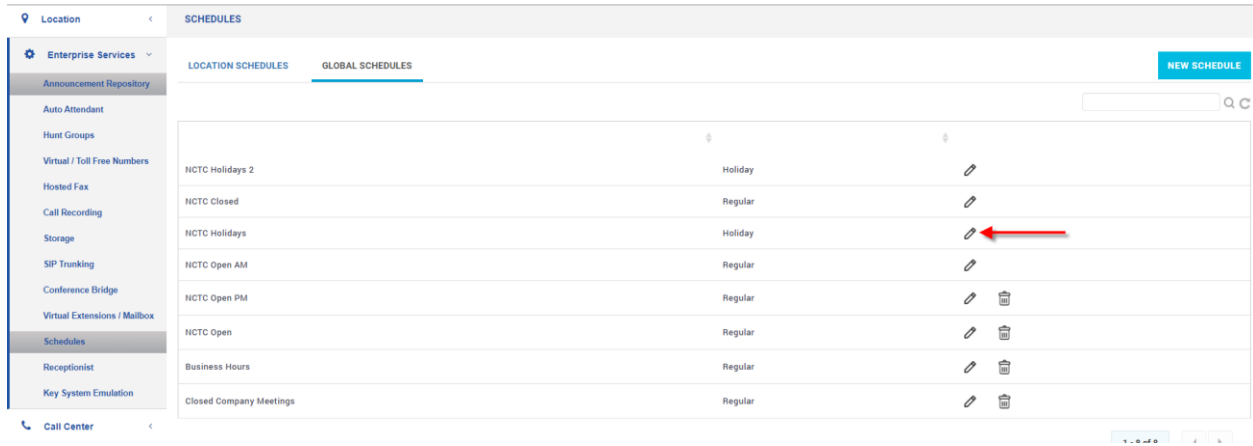


Figure 13 Edit Schedule

Though not required, for holiday schedules you can view the schedule and its included events in year view vs. month, week and day view.

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SCHEDULE

SCHEDULE NAME \* NCTC Holidays SCHEDULE TYPE: Holiday

< > today 2019 month week day year

January 1, 2019	Tuesday
● New Years Day	
July 4, 2019	Thursday
● Independence Day	
December 25, 2019	Wednesday
● Christmas Day	
December 26, 2019	Thursday
● Christmas Day	

ADD EVENT SAVE CLOSE

Figure 14 Year View

When year view is selected for a holiday schedule, it will make it easier to view your holiday events in a condensed form. As shown above, the following events exist in the NCTC Holidays schedule:

- January 1, 2019 (New Year's Day)
- July 4, 2019 (Independence Day)
- December 25-26, 2019 (Christmas Day)

In this example, we will add a holiday event which currently is not included in this holiday schedule. To do so, click Add Event

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**SCHEDULE** ✕

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SCHEDULE NAME \*  SCHEDULE TYPE : Holiday ▾

< > today

2019

month week day year

<b>January 1, 2019</b>	<b>Tuesday</b>
● New Years Day	
<b>July 4, 2019</b>	<b>Thursday</b>
● Independence Day	
<b>December 25, 2019</b>	<b>Wednesday</b>
● Christmas Day	
<b>December 26, 2019</b>	<b>Thursday</b>
● Christmas Day	

→ADD EVENT SAVE CLOSE

Figure 15 Add Event

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Figure 16 New Event Recurring New Year's Day

For this example, we named this event New Year's Day

- Event is enabled
- Event is configured to recur yearly, every January 1 with no end date
- The Event includes the full day of January 1

With this configuration, this event will recur every January 1<sup>st</sup>, all day with no end date.

Click Save to save this event to the NCTC Holidays schedule.

Click Save again on the schedule to save the schedule along with any events that are included in the schedule.

Note: This example is associated with a static event that occurs on the same date each year. For other events that may occur on the 3<sup>rd</sup> Thursday of November for example, the event can be configured to do so by using the ON option instead of the Every option.

## Editing an Existing Event

If an event already exists within a schedule and you need to modify it, you can easily do so.

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1. Open the Schedule where the event resides
2. In the Schedule view, find the event within the schedule calendar and double click it to open it
3. The Update Event window will display the current configuration for the selected event. Make any necessary modifications and click Save to save your changes. Alternatively, if you wish to delete the event, click the Delete button.

## Configuring Hunt Groups to Use a Schedule

Navigate to Enterprise Services>>Hunt Groups

Find the Hunt Group to configure and click the Edit button to the far right of the Hunt Group desired.

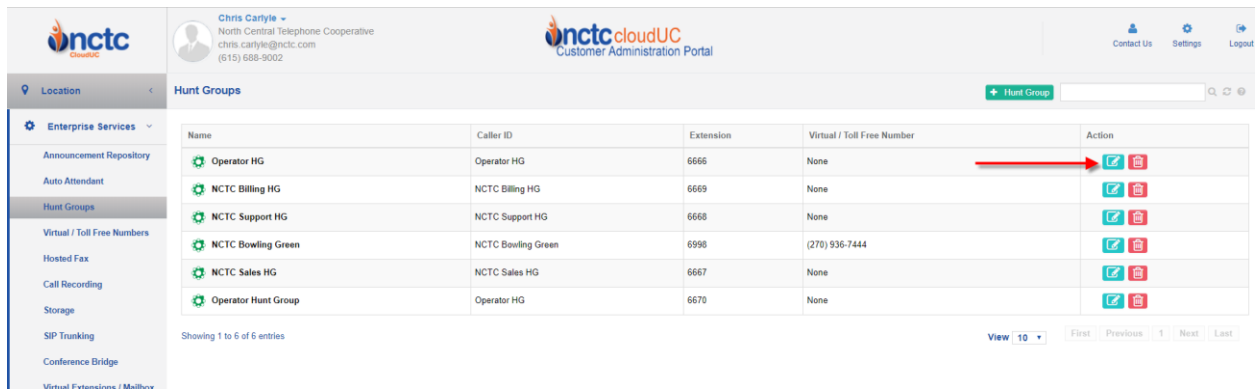


Figure 17 Hunt Group Edit

From the Hunt Group configuration, scroll to the bottom to view the Scheduled Call Routing options.

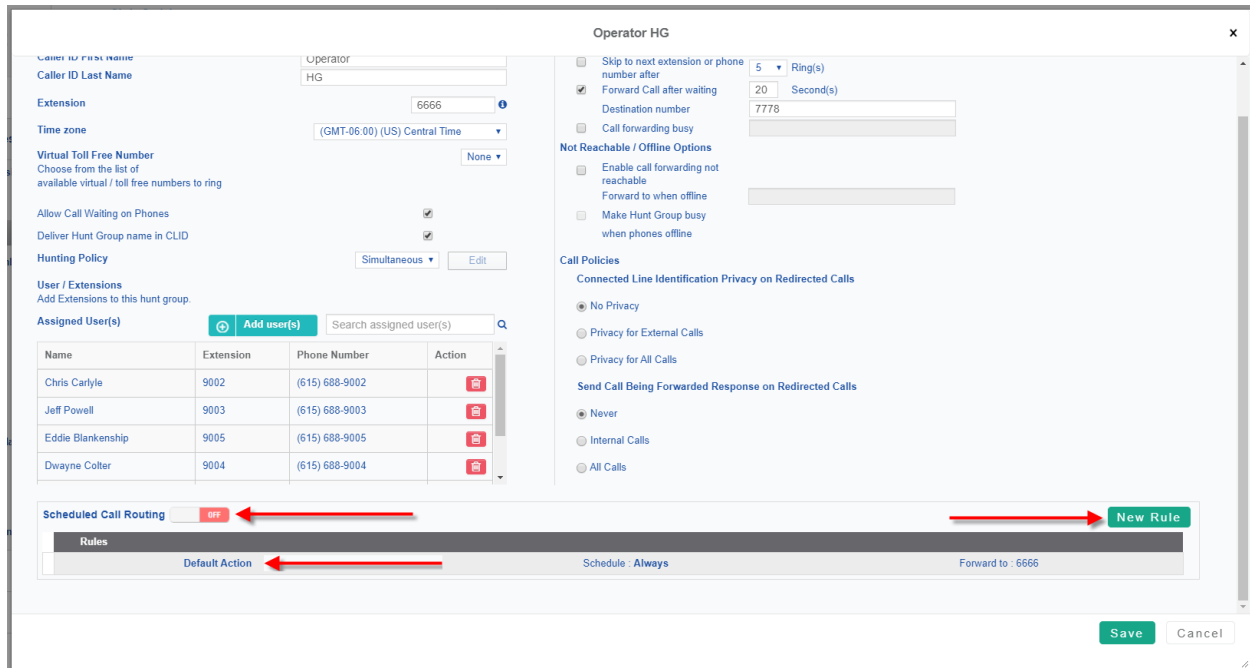


Figure 18 Hunt Group Scheduled Call Routing

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By default a hunt group has scheduled call routing disable and has a default call routing rule named Default Actions. This default action, routes the call to the hunt group, in effect not re-routing a call to an alternate destination.

To add a rule, click the New Rule button.

Note: When adding rules, the order in which the rules are placed will dictate the operation of the rules. Rules are processed top to bottom with a first match method. It is recommended to place schedules such as holiday schedules at the top of your rule list then regular schedules after a holiday schedule.

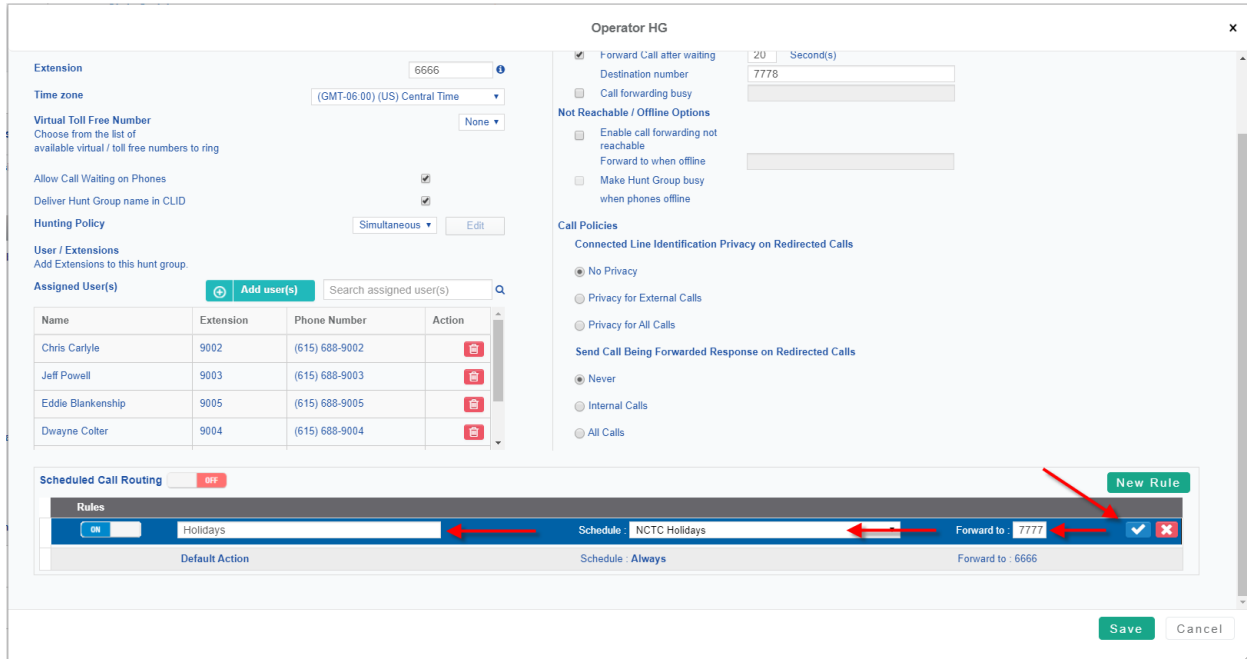


Figure 19 Holiday Rule Addition

In this example, an action named Holidays has been added to the rule set for this hunt group. Once the action has been named, select the existing schedule in which this rule should match against. In this example, we selected the previously configured NCTC Holidays schedule. In the Forward To field, enter the extension number or telephone number where calls should be routed to when this action/rule is matched. In this example, we have entered extension 7777 which is our auto attendant. Inversely, this could be set to any hunt group extension, any auto attendant extension, any user extension or any outside telephone number.

Once the rule is setup as desired, click the blue checkmark icon to save it.

Now you can add additional rules as desired. If this hunt group was saved as is, any call directed to this hunt group (6666) would ring the configured hunt group members unless it was during a timeframe matched by the NCTC Holidays schedule, in which case calls would be routed to 7777, an auto attendant in this case.

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Next we will add a rule to additionally route calls to the auto attendant outside or normal business hours.

To do so, Click Add Rule

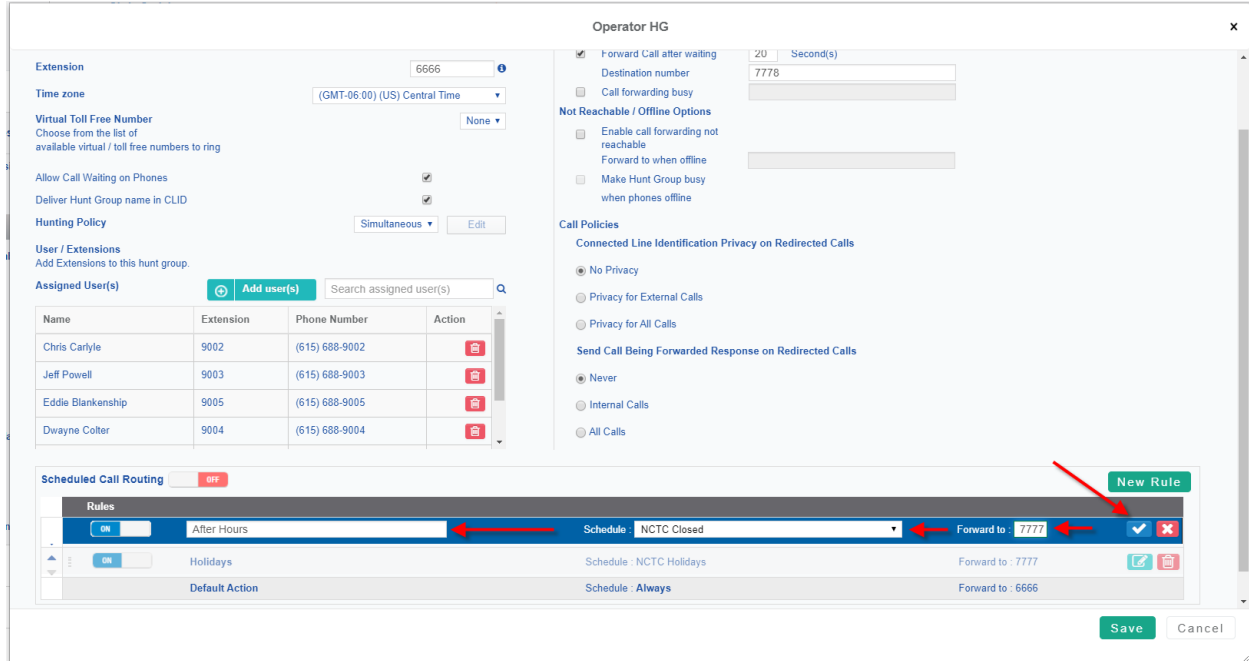


Figure 20 Add Rule

A new rule is created and again we will define an action name, an applicable schedule and a forward to destination. In this example, we named the action After Hours, select the NCTC Closed schedule and configured the forward to route calls to 7777, our auto attendant. Click the blue check mark to save this rule.

This is an example of where the order of the actions will dictate behavior. In the current state, when a call is routed to this hunt group, anything outside of normal business hours will match the NCTC Closed schedule. However, our NCTC Closed matches any times/days Monday through Friday after 5:00PM. This would be a match even if a Monday also happened to be Memorial Day (included in the NCTC Holidays schedule). Since the rule processing starts top down and acts on the first match, the holiday schedule action would never be invoked. To fix this, we need to re-order our rules to put the Holidays action above the After Hours action.

To do so, select the up or down arrow to the left of the desired action to move it up or down.

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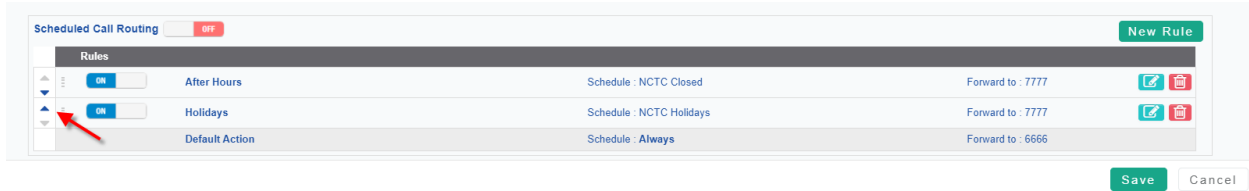


Figure 21 Action Move Up/Down

By clicking the Up arrow for the Holidays action, this will place it above the After Hours action.

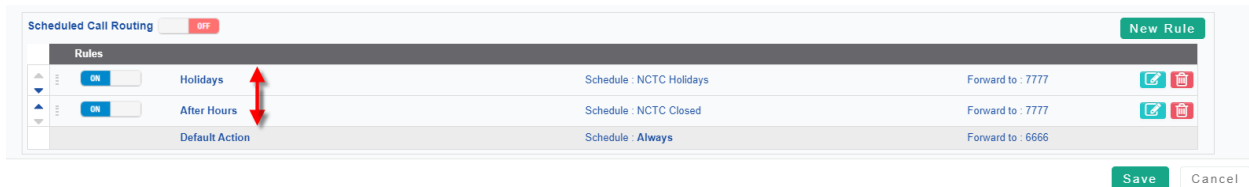


Figure 22 Action Re-order

Once the actions are correct, select the Scheduled Call Routing to On and save.

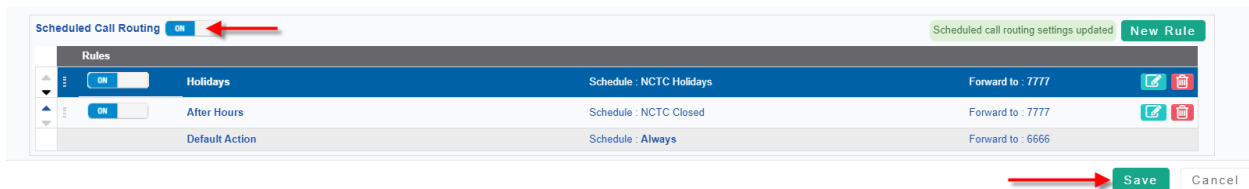


Figure 23 Enable Scheduled Call Routing and Save

With this configuration a call routing to this hunt group will follow the configured scheduled call routing rules:

- Is it a match to the NCTC Holidays schedule? If Yes, route to 7777, if not check next rule
- Is it a match to the NCTC Closed schedule? If Yes, route to 777, if not check next rule
- Is it a match to the Default/Always Rule? The answer is always yes and the call is routed to 6666 (this hunt group)

## Configuring Auto Attendants to Use a Schedule

Navigate to Enterprise Services>>Auto Attendant

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Figure 24 Auto Attendants

Find the Auto Attendant in which you want to apply a schedule and click the edit button to the far right of the desired Auto Attendant.

When the selected Auto Attendant is displayed, you will see a similar Rules section as is shown for Hunt Groups.

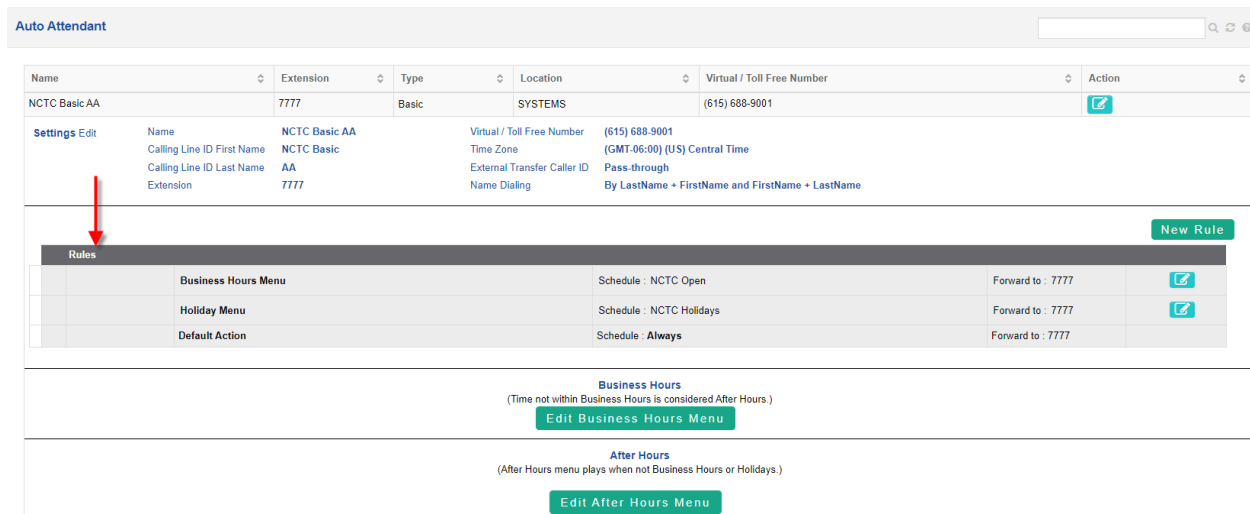


Figure 25 Auto Attendant Rules

In the example above, there are 3 Rules shown, each of which have an assigned schedule and a forward to destination.

**Business Hours Menu Rule** – uses the NCTC Open Schedule – when true, routes calls to 7777 (this Auto Attendant)

**Holiday Menu** – Uses the NCTC Holidays Schedule – when true, routes calls to 7777 (this Auto Attendant)

**Default Action** – Uses the implied Always schedule – when true, routes calls to 777 (this Auto Attendant)

With the configuration shown, calls will always route to 7777 (this Auto Attendant). One additional feature of a schedule applied to an Auto Attendant is that a different greeting/menu can be used for specific times of date. In this example, this is the point of the schedule.

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Below the rules, you will note that there is a Business Hours Menu and an After Hours Menu

Business Hours Menu – this defines that this menu will be used when the schedule assigned is assigned to the Business Hours Menu (not editable).

The screenshot shows the 'Auto Attendant' configuration page for 'NCTC Basic AA'. The 'Settings Edit' section includes fields for Name, Extension (7777), Type (Basic), Location (SYSTEMS), and Virtual / Toll Free Number ((615) 688-9001). Below the settings is a 'Rules' table with three rows: 'Business Hours Menu' (Schedule: NCTC Open), 'Holiday Menu' (Schedule: NCTC Holidays), and 'Default Action' (Schedule: Always). Below the table are sections for 'Business Hours' and 'After Hours', each with an 'Edit' button. Red arrows point from the 'Business Hours Menu' rule to the 'Edit Business Hours Menu' button and from the 'Business Hours' section to the 'Edit Business Hours Menu' button.

Name	Extension	Type	Location	Virtual / Toll Free Number	Action
NCTC Basic AA	7777	Basic	SYSTEMS	(615) 688-9001	[Edit]

Settings Edit	Name	Virtual / Toll Free Number
Calling Line ID First Name	NCTC Basic AA	(615) 688-9001
Calling Line ID Last Name	NCTC Basic	(GMT-06:00) (US) Central Time
Extension	AA	Pass-through
	7777	By LastName + FirstName and FirstName + LastName

Rules	Schedule	Forward to	Action
Business Hours Menu	NCTC Open	7777	[Check] [X]
Holiday Menu	NCTC Holidays	7777	[Edit]
Default Action	Always	7777	[Edit]

**Business Hours**  
(Time not within Business Hours is considered After Hours.)  
[Edit Business Hours Menu]

**After Hours**  
(After Hours menu plays when not Business Hours or Holidays.)  
[Edit After Hours Menu]

Figure 26 Business Hours Menu Schedule

Holiday Menu – this defines that this menu will be used when the schedule assigned is assigned to the Holiday Menu/After Hours (not editable).

The screenshot shows the 'Auto Attendant' configuration page for 'NCTC Basic AA'. The 'Settings Edit' section is identical to Figure 26. The 'Rules' table has three rows: 'Business Hours Menu' (Schedule: NCTC Open), 'Holiday Menu' (Schedule: NCTC Holidays), and 'Default Action' (Schedule: Always). Below the table are sections for 'Business Hours' and 'After Hours', each with an 'Edit' button. Red arrows point from the 'Holiday Menu' rule to the 'Edit Business Hours Menu' button and from the 'After Hours' section to the 'Edit After Hours Menu' button.

Name	Extension	Type	Location	Virtual / Toll Free Number	Action
NCTC Basic AA	7777	Basic	SYSTEMS	(615) 688-9001	[Edit]

Settings Edit	Name	Virtual / Toll Free Number
Calling Line ID First Name	NCTC Basic AA	(615) 688-9001
Calling Line ID Last Name	NCTC Basic	(GMT-06:00) (US) Central Time
Extension	AA	Pass-through
	7777	By LastName + FirstName and FirstName + LastName

Rules	Schedule	Forward to	Action
Business Hours Menu	NCTC Open	7777	[Edit]
Holiday Menu	NCTC Holidays	7777	[Check] [X]
Default Action	Always	7777	[Edit]

**Business Hours**  
(Time not within Business Hours is considered After Hours.)  
[Edit Business Hours Menu]

**After Hours**  
(After Hours menu plays when not Business Hours or Holidays.)  
[Edit After Hours Menu]

Figure 27 Holiday Menu

For both the Business Hours Menu and the Holiday/After Hours Menu, a unique set of menu options and greetings can be configured. Please see Auto Attendant admin instructions for Menu configuration.

Just as with Hunt Group Rules, the order of the rules in the table shown matter. Rules are evaluated with a top down match, if a match is found the forward to destination for that match is executed. If no match is found, any remaining rules in place are processed.

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To modify an existing rule, simply click the edit button to the far right of the rule.

The screenshot shows the 'Auto Attendant' configuration page. At the top, there's a search bar and a 'New Rule' button. Below is a table with columns: Name, Extension, Type, Location, Virtual / Toll Free Number, and Action. The main table lists rules: 'Business Hours Menu', 'Holiday Menu', and 'Default Action'. Each rule has a 'Forward to' field and an edit button (pencil icon). A red arrow points to the edit button for the 'Business Hours Menu' rule. Below the table, there are sections for 'Business Hours' and 'After Hours' with 'Edit' buttons.

Figure 28 Modify Existing Rule

To create a new rule, click the New Rule button.

The screenshot shows the 'Auto Attendant' configuration page. A 'New Rule' button is highlighted in the top right. Below it, a new rule is being added. The 'Rules' table has a new row with a blue header 'New Rule'. The 'On/Off' slider is turned on. The 'Name' field is empty, the 'Schedule' is set to 'Every Day All Day', and the 'Forward to' field is set to '7777'. A red checkmark is visible in the 'Action' column, indicating the rule is saved. Red arrows point to the 'On/Off' slider, the 'Name' field, the 'Schedule' dropdown, the 'Forward to' field, and the checkmark.

Figure 29 New Rule

1. Turn the rule on or off using the On/Off slider
2. Create a unique name for the new rule in the second column
3. Select the existing schedule that will be applied to this rule in the Schedule column
4. Configure the Forward to destination, this will be the Auto Attendant, Hunt Group or other extension where calls will be routed upon a match to this rule
5. Click the blue Check Mark to save the rule.

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To delete a rule, click the edit button for the rule then click the red X icon to delete it.

Once all modifications have been made, you can exit the Auto Attendant configuration page.