

Call Flow and IVR Overview

Call Flow Overview

In order to link a device to a number so that the device will ring when that number is called you need to set up a **Call Flow**. To do so, select the **Phone** option from the 3Connect UC Portal menu and select **Call Flows from the sub menu**.

Before proceeding, make sure all the **Users**, **Numbers** and **Devices** you want to link have been added to the account.

Adding a Call Flow

- To add a call flow, click on the create new flow button on the right.
- Label the call flow with a name and a description.
- A menu of tools will appear. From here you can manage your call routing or set up IVRs and hunt groups, according to your business needs, and amend these settings every time you need to do so.

Other Configuration Options

- A number of other videos in the help section discuss the different configuration options for call flows.
- Navigate to the numbers section and link the created call flow with the number (extension or PSTN) you wish to use.
- Naming call flows descriptively is very useful to recognise the call routing at a glance. When linked, whenever the number is called, it will execute the settings from the call flow.

Linking/Unlinking Call Flows and Numbers

Once a call flow has been created, you then must link it to the relevant number(s). To do this, click on the **Phone icon** on the navigation bar to the left and click on Numbers from the drop-down menu.

Click the **Pink Edit Button** to the left of your chosen number, select the correct call flow from the drop-down menu and select Save.

The number will now ring as set out in the call flow. In order to be reached, every number (internal or PSTN) needs to be linked to a call flow.

However, if you want to change the destination of the call, search for the number and then click on **Unlink Call Flow**. Clicking on Link Call Flow can reverse this action.

IVR Overview

Set up and IVR or Virtual Receptionist

The 3Connect **portal** allows you to send a call to a virtual receptionist, also known as an **IVR (Interactive Voice Response)**. To do this, navigate to the call flow section via the phone option in the main menu. There are no limitations to the layers included in the IVR and its complexity. To set this up, click on **Create New Flow** and drag the element Menu from the application list.

Setting up Audio

From the Settings icon of the **Menu element**, select your audio file from the Media field, this media file should list instructions to the caller on what number to press for the different menu items you make available to them. You can select an existing file already uploaded from the drop-down menu or you can drag and drop or browse for the audio file you are looking for and then press **Add** and then **press Ok**. Complete this operation by selecting the file you want your callers to listen to and press Ok.

Ring Element

The next step requires you drag a Ring element from the application list on the right, underneath the Menu element.

Once that has been done, click on the **Settings icon** from the Ring element and configure the key to digit (from 0 to 9) to execute the action of this IVR branch. A keypad will appear to allow you to select the desired number. Click on the Settings icon for the third option of the chosen Ring element and select the User(s) and/or the Device(s) and/or the Groups from the Ring Element Settings and/or add a PSTN number.

Repeat the above steps for every key or branch you want to add.

Label the **Call Flow** with name and description and link the created Call Flow with the number (extension or PSTN) you wish to use in the Numbers section.