

Grandstream Networks, Inc.

UCM6xxx Series

Dial By Name How To Guide



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INTRODUCTION

Dial By Name is a feature on the PBX that allows caller to search a person by first or last name by entering mapped letters from caller phone keypad.

The administrator can define the Dial By Name directory including desired extensions and the searching type by "first name" or "last name" as well as how matching results are presented ("By Order" or "By Menu").

Dial By Name can be an option in IVR/Auto-attendant; after dialing in and selecting Dial By Name option from IVR, caller will be requested to enter first 3 letters (mapped to digits from keypad) to find the person in the Dial By Name directory.

UCM6XXX Dial By Name feature is very useful when companies don't want to reveal internal extensions numbers and want to have a restricted list of employees to be accessible by callers from outside.

Using UCM6xxx Dial By Name feature provides following benefits:

- The administrator can define the Dial By Name directory to only include desired extensions to be reached. This helps block unscreened calls to reach employees who do not want to receive those calls directly.
- It offers customers/clients a guided automatic system to get in touch with the enterprise employees without having to know their extension numbers.
- Automatic IVR system will improve the business image.

Note: UCM6XXX series include UCM620x series, UCM630x series, UCM630xA series and UCM6510.



DIAL BY NAME CONFIGURATION

Create New Dial by Name

Administrators can create the dial by name group under web GUI → **Call Features** → **Dial By Name**.

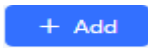
1. Click on , and the following window will popup.

Figure 1: Create New Dial By Name

2. Enter the Name of the Dial By Name Group.
3. Enter the extension Number.
4. Set a custom prompt for directory to announce to a caller.
5. Add extensions from “**Available Extensions**” to “**Selected Extensions**”.
6. Add LDAP directory from “**Available LDAP**” to “**Selected LDAP**” if available.
Note: This option is available only if at least 2 UCM6xxx are peered and synchronized.
7. Configure “Prompt Wait Time” for Dial By Name feature. The timeout range is between 3 and 60 seconds.
8. Select the **Query Type** (“By Last Name + First Name” or “By First Name + Last Name”).
9. Select the **Type** (“By Order” or “By Menu”).
10. **Save** and **Apply** the changes.



Table 1: Dial By Name Settings

Name	The name of the Dial By Name Group.
Extension	The Extension of the Group, the range allowed on the UCM is: 7101→7199.
Custom Prompt	This option sets a custom prompt for directory to announce to a caller. The file can be uploaded from the page "Custom Prompt". Click " Upload Audio File " to add additional record.
Members	Select extension to add to the Dial By Name Directory.
LDAP Phonebook	Select LDAP directory to add to the Dial By Name Directory.
Prompt Wait Time	Configure "Prompt Wait Time" for Dial By Name feature. During Dial By Name call, the caller will need to input the first letters of First/Last name before this wait time is reached. Otherwise, timeout will occur and the call might hang up. The timeout range is between 3 and 60 seconds.
Query Type	This defines how the caller will need to enter to search the directory. Two options are available: • By Last Name + First Name: Query extensions by firstname + lastname. • By First Name + Last Name: Query extensions by lastname + firstname.
Select Type	Specify the select type on the searching result. The IVR will confirm the name/number for the party the caller would like to reach before dialing out. • By Order: After the caller enters the digits, the IVR will announce the first matching party's name and number. The caller can confirm and dial out if it's the destination party, or press * to listen to the next matching result if it's not the desired party to call. • By Menu: After the caller enters the digits, the IVR will announce 8 matching results. The caller can press number 1 to 8 to select and call, or press 9 for results in next page.

Record/Customize the voicemail greetings

By default, the Dial By Name feature will spell letter by letter the name of extension matching the search criteria. However, if you want to announce the full name assigned to the dialed extension instead of spelling it letter by letter, you can use the recorded voicemail greetings which contains the extension's name.

To record this voicemail greetings, please make sure to follow the steps below:

1. Make sure to edit the extensions that belong to Dial By Name, then Enable Voicemail option
2. Dial *98 to access the voicemail
3. Enter the desired extension that belongs to Dial By Name feature then enter its voicemail password
4. Press "0" to enter the recordings menu
5. Now press "3" to record the extension's owner First name and Last Name as greeting message



DIAL BY NAME FEATURE USE CASE

Access directly the Dial By Name

Once configured, the “Dial By Name” feature will behave by design as follow:

1. Caller should dial the Dial By Name extension number (7101 in this example)
 2. UCM will play an audio prompt asking the caller to enter the first 3 digits of the extension owner's name (First Name or last name)
 3. Once the caller enters the 3 digits and the UCM finds the right extension matching the search criteria, The UCM will play the message bellow:
 - a. If the **Greeting message** is not recorded for the matching extension, the UCM will spell the matching extension's First Name/ Last Name.
 - b. If the **Greeting message** is recorded for the matching extension, UCM plays the Greeting message that contains matching extension's first name or last name
- Note:** Refer to section *Record/Customize the voicemail greetings*
4. Now the caller should confirm if this extension is matching his expectation by pressing digit “1”
 5. Once done, the UCM will forward the call to the right extension.

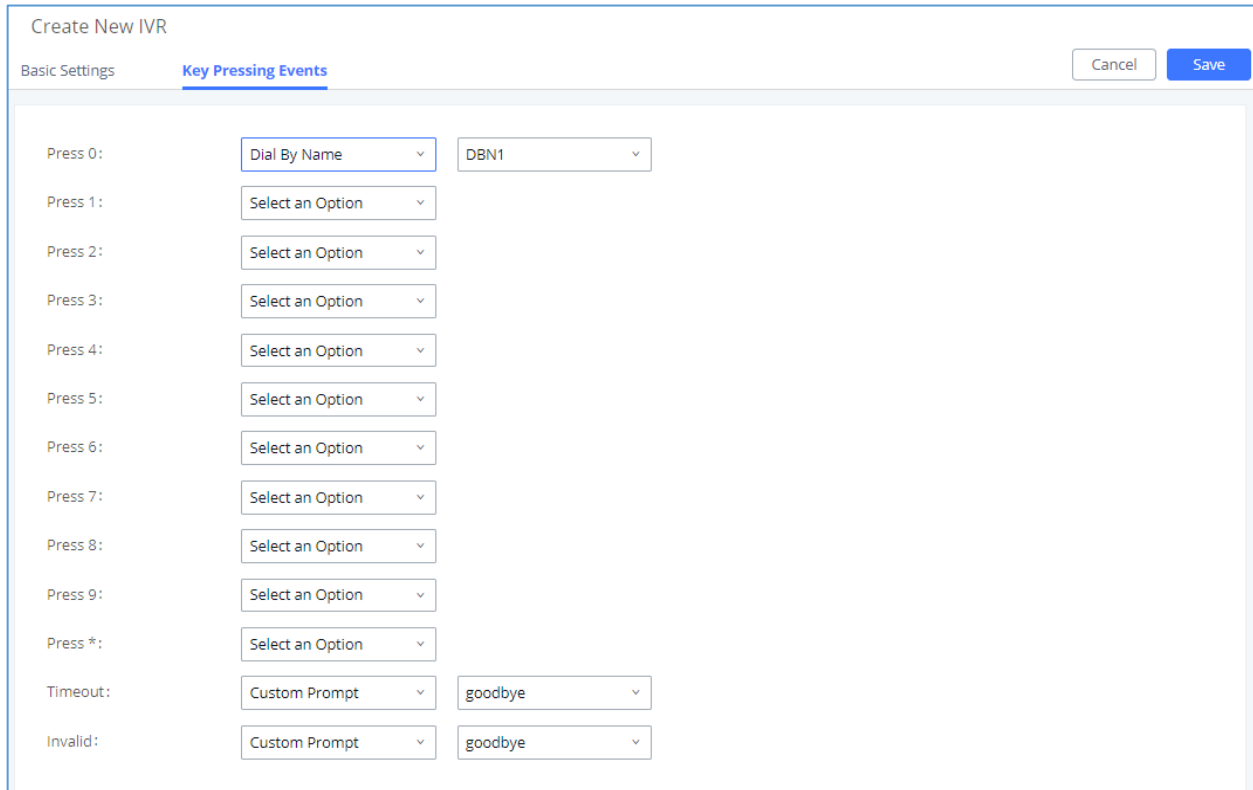
Note: Administrator can also set Dial By Name as an option in IVR where incoming external calls are redirected to allowing outside callers to search for a specific person by his name instead of knowing his extension.



Using Dial By Name in Inbound Route

Once successfully created, users can configure the inbound route destination as "Dial By Name" or IVR key event as "Dial By Name".

- To configure Dial By Name as IVR Key Pressing Event, go to UCM6XXX WebGUI → **Call Features** → **IVR**.
- Edit an existing IVR or Create a new one to use in inbound routes.
- Go to Key Pressing Events and choose Dial By Name from drop-down list next to the desired key event.



Create New IVR

Basic Settings **Key Pressing Events** Cancel Save

Press 0:	Dial By Name	DBN1
Press 1:	Select an Option	
Press 2:	Select an Option	
Press 3:	Select an Option	
Press 4:	Select an Option	
Press 5:	Select an Option	
Press 6:	Select an Option	
Press 7:	Select an Option	
Press 8:	Select an Option	
Press 9:	Select an Option	
Press *:	Select an Option	
Timeout:	Custom Prompt	goodbye
Invalid:	Custom Prompt	goodbye

Figure 2: Set Dial By Name as Key Event

User needs to set "Dial By Name" on "Dial other Extensions" field in order to restrict the use of the IVR for incoming call, to only Dial By Name.



Edit IVR: IVR-SC2

Basic Settings
Key Pressing Events

* Name :

* Extension :

Dial Trunk :
☐

Dial Other Extensions :

☐ All
☒ Extension
☐ Conference
☐ Video Conference
☐ Call Queue
☐ Ring Group
☐ Paging/Intercom Groups
☐ Voicemail Groups
☐ Fax Extension
☒ Dial By Name

* IVR Black/Whitelist :

Replace Display Name :
☐

Return to IVR Menu :
☐

Alert-info :

* Prompt :

[Add Prompt](#)

* Digit Timeout :

* Response Timeout :

* Response Timeout Prompt :

* Invalid Input Prompt :

* Response Timeout Prompt Repeats :

* Invalid Input Prompt Repeats :

Language :

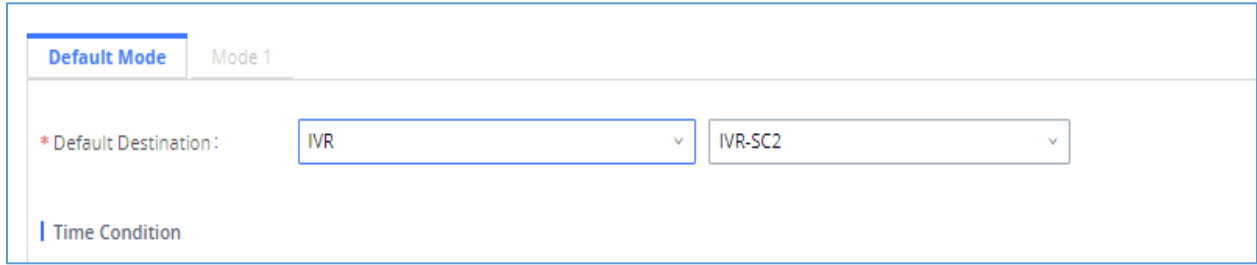
Figure 3: Dial By Name Option

Note: On the UCM630x and UCM630xA series, under **IVR → Basic Settings** has “Auto Record” option if enabled, calls to this IVR will automatically be recorded.

Once set, Go to **Extension/Trunk → Inbound Routes**.

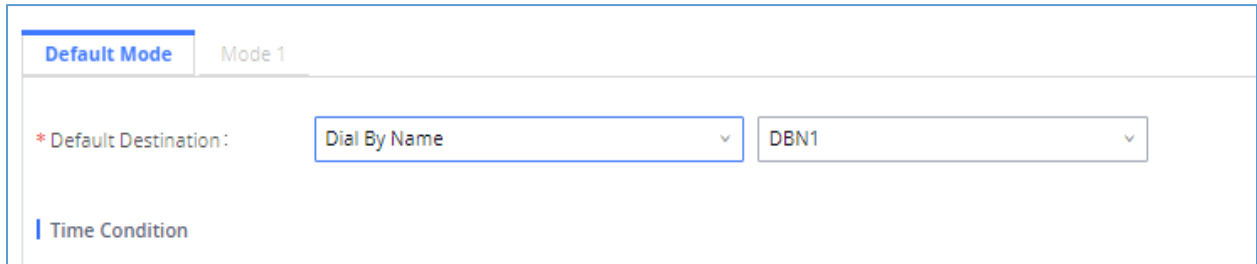


User can set the destination under the inbound routes of a trunk to Dial By Name directly or IVR with a pressing key event configured as Dial By Name.



The screenshot shows a configuration window with two tabs: "Default Mode" (active) and "Mode 1". Under "Default Mode", there is a section labeled "* Default Destination:" with two dropdown menus. The first dropdown menu is set to "IVR" and the second is set to "IVR-SC2". Below this, there is a section labeled "Time Condition" with a vertical bar icon.

Figure 4: Setting IVR as Default Destination



The screenshot shows a configuration window with two tabs: "Default Mode" (active) and "Mode 1". Under "Default Mode", there is a section labeled "* Default Destination:" with two dropdown menus. The first dropdown menu is set to "Dial By Name" and the second is set to "DBN1". Below this, there is a section labeled "Time Condition" with a vertical bar icon.

Figure 5: Setting Dial By Name as Default Destination

When calling into that Trunk and selecting Dial By Name, users will be prompted to enter the first three digits of the user "first name" or "last name" in order to be redirected to the wanted contact.



DIAL BY NAME CALL FLOW

The following shows an example of Dial By Name flow where caller reaches Dial By Name feature and try to talk to employee “Jane Doe”:

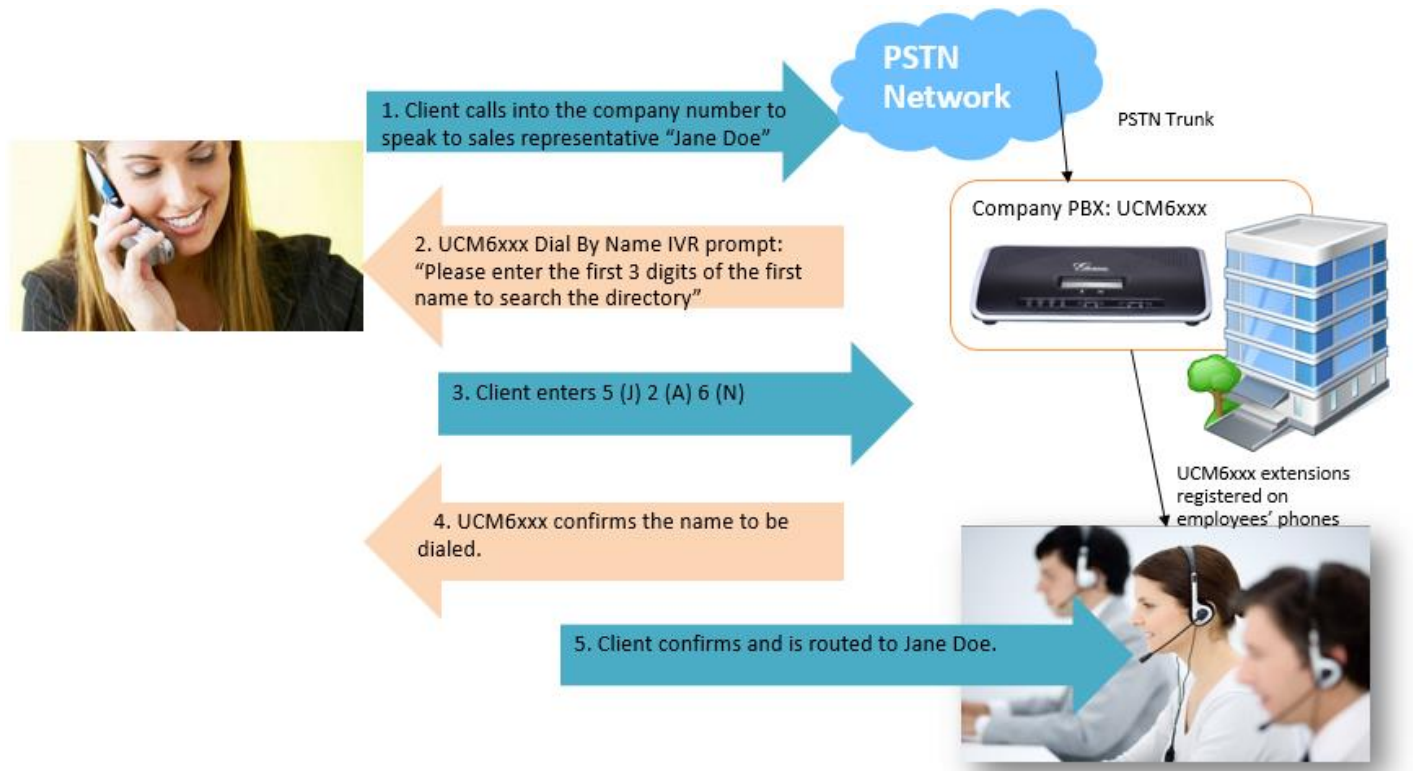


Figure 6: Dial By Name Flow

