

# Quick Start Guide

## Holiday Management v3 15/03/2019 MDN

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## 1. Introduction

It is now possible to manage schedules called Holiday Periods, which can exist alongside weekly out-of-hours schedules.

These schedules can currently be attached to Hunt Groups, Receptionist Groups and Standard Call Centre Groups. These schedules may be extended to other call flow elements in the future.

When combining different schedules, the Holiday will always take precedence. I.e. if the Holiday is applicable then the action associated with the Holiday will always be played. It is only possible to provide an Open or Closed response if the Holiday period is not applicable.

Consider the following example:

	Open	Closed	Holiday
Chosen schedule:	9am-5pm Mon-Fri	0am-08:59am & 5pm-11:59pm Mon-Fri, 0am-11:59pm Sat-Sun	19 <sup>th</sup> & 22 <sup>nd</sup> April, 6 <sup>th</sup> May

A call placed any time on the 19th April will always play the relevant Holiday response, regardless of the Open/Closed hours. A call placed at 7pm on the 18th April would instead provide a Closed response.

Each Holiday Event Group is designed to cluster multiple, individual Holiday Events over a wide period, such that each Inclarity number need only reference a single Holiday Event Group to access this calendar of information.

Also note that each Holiday Event Group can be updated at any time, such that the updates are immediately applied to all of the Inclarity numbers that are currently referencing that group.

These new Holiday schedules can be managed by any reseller or customer using the SMT web portal. Management is a two-step process, such that the schedules can be managed independently of the telephone numbers they are applied to. Importantly, only a single set of Holiday Events needs to be defined per Customer, and can be used by any/all of the numbers owned by that Customer.

- Holiday Event Groups are managed at Customer level
- Hunt Groups, Receptionist groups and Standard Call Centre groups are managed at Site level

The sections below will walk you step-by-step through this process in more detail.

## 2. Managing Holiday Event Groups

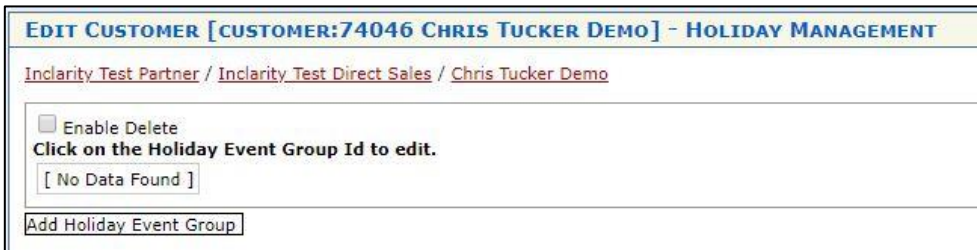
Before you can set up any telephone numbers, you will first need to define the Holiday Event Group, which will contain the schedule criteria for when your Holiday period will be active.

You may create any number of Holiday Event Groups, and you may include as many Holiday Events as you like within a single Holiday Event Group.

To manage your Holiday Event Groups you will need to navigate to the Customer level of SMT and then from the **Advanced Settings** menu choose the **Holiday Management** option.

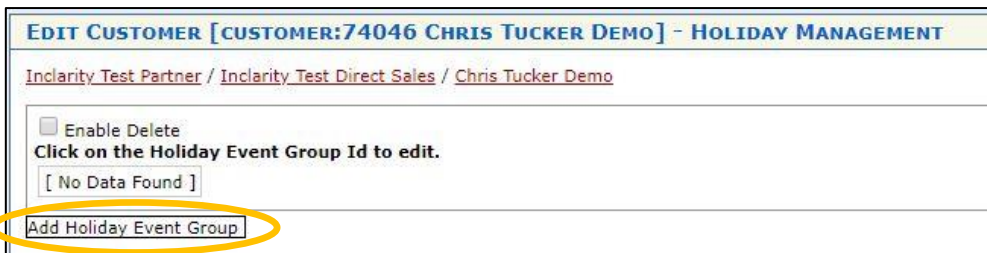


This will take you to an area listing all of your Holiday Event Groups. If this is your first time navigating to this area, then the list will be blank, similar to the below.

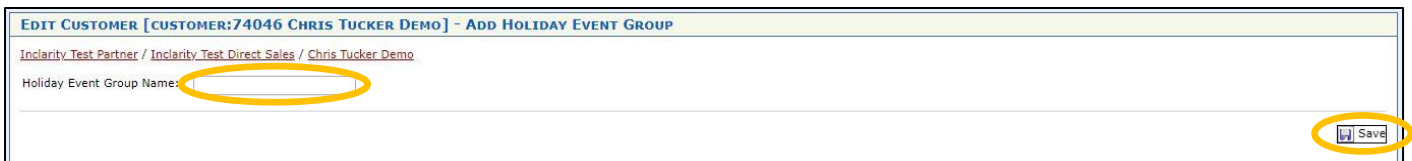


### 2.1 Adding a New Holiday Event Group

Click on the **Add Holiday Event Group** button to create a new group.



You will be prompted to give the new Holiday Event Group a name:



After entering the name, click **Save**. You will be returned to the main screen, which will now include your new group in the list.

**EDIT CUSTOMER [CUSTOMER:74046 CHRIS TUCKER DEMO] - HOLIDAY MANAGEMENT**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Enable Delete  
**Click on the Holiday Event Group Id to edit.**

ID	Holiday Event Group Name	Owner
48	Public Holidays	customer:74046

## 2.2 Adding a Holiday Event

A new Holiday Event Group will remain empty until you populate it with the individual Holiday Events that meet your requirements.

To add a new Holiday Event to your group click on the group ID in the list provided.

**EDIT CUSTOMER [CUSTOMER:74046 CHRIS TUCKER DEMO] - HOLIDAY MANAGEMENT**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Enable Delete  
**Click on the Holiday Event Group Id to edit.**

ID	Holiday Event Group Name	Owner
48	Public Holidays	customer:74046

Within each Holiday Event Group you will see a list of Events, normally blank by default for a new group:

**EDIT HOLIDAY EVENT GROUP [48 PUBLIC HOLIDAYS]**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Holiday Event Group Name:

Enable Delete  
**Click on the Holiday Event Id to edit.**

[ No Data Found ]

Click on **Add holiday Event** to add a new event to the list.

**EDIT HOLIDAY EVENT GROUP [47 PUBLIC HOLIDAYS] - ADD HOLIDAY EVENT**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Holiday Event Group Name:

Holiday Event Name:

**Event Time:**

Start Date:  (dd/mm/yyyy) Start Time:

End Date:  (dd/mm/yyyy) End Time:

All Day Event

For each event enter:

- **Holiday Event Name**
- **Start Date** (and **Start Time**)
- **End Date** (and **End Time**)

By default the wizard will set your event to be an All Day Event, meaning that it will start at 00:00 on the Start Date, and will finish at 23:59 on the End Date. However, if you untick the All Day Event box, you can specify an alternate Start Time and End Time.

Once you have correctly specified your event, click on **Add Holiday Event** again to enter it into your list.

ID	Holiday Event Name	Start Date	End Date
60	April Bank Holiday	12-Mar-19	12-Mar-19

Repeat this process as many times as needed to populate the Holiday Event Group with all of the events necessary to meet your requirements.

### 2.3 Editing Holiday Information

It is possible to edit the content of a Holiday Event Group even after it is in use. In practice it will be common to return to your settings periodically to populate new Holiday Events in the future, or to update Holiday Events you have already added.

To update these settings simply return to the **Holiday Management** menu option at Customer level in SMT:

From your list of Holiday Event Groups, select the ID of the group that you need to update:

**EDIT CUSTOMER [CUSTOMER:74046 CHRIS TUCKER DEMO] - HOLIDAY MANAGEMENT**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Enable Delete  
Click on the Holiday Event Group Id to edit.

ID	Holiday Event Group Name	Owner
48	Public Holidays	customer:74046

This page will display all holiday events that have already been created, click on the holiday event ID of the event you would like to edit.

**EDIT HOLIDAY EVENT GROUP [48 PUBLIC HOLIDAYS]**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Holiday Event Group Name:

Enable Delete  
Click on the Holiday Event Id to edit.

ID	Holiday Event Name	Start Date	End Date
69	1 Day Event	13-Mar-19	13-Mar-19
71	Easter Bank Holiday	19-Apr-19	22-Apr-19
70	May Bank Holiday	06-May-19	06-May-19

This will open the holiday event where you can adjust the Name, Date and/or Time fields as needed.

**EDIT HOLIDAY EVENTS [71 EASTER BANK HOLIDAY]**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Holiday Event Group Name:

Holiday Event Name:

**Event Time:**

Start Date:   (dd/mm/yyyy) Start Time:   All Day Event

End Date:   (dd/mm/yyyy) End Time:

Once you have finished, click the **Save** button to commit your changes to the system.

## 2.4 Deleting Holiday Information

In the Holiday Management area, if you no longer need a Holiday Event Group you can select the **Enable Delete** option:

**EDIT CUSTOMER [CUSTOMER:74046 CHRIS TUCKER DEMO] - HOLIDAY MANAGEMENT**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Enable Delete  
Click on the Holiday Event Group Id to edit.

ID	Holiday Event Group Name	Owner
48	Public Holidays	customer:74046

This then allows you to select to **Delete** the relevant group:

**EDIT CUSTOMER [CUSTOMER:74046 CHRIS TUCKER DEMO] - HOLIDAY MANAGEMENT**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Enable Delete  
Click on the Holiday Event Group Id to edit.

ID	Holiday Event Group Name	Owner	
48	Public Holidays	customer:74046	Delete

**IMPORTANT:** You cannot delete a Holiday Event Group that is actively in use by your group telephone numbers.

Similarly, within each Holiday Event Group, you can similarly select **Enable Delete**:

**EDIT HOLIDAY EVENT GROUP [48 PUBLIC HOLIDAYS]**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Holiday Event Group Name:

Enable Delete  
Click on the Holiday Event Id to edit.

ID	Holiday Event Name	Start Date	End Date
69	1 Day Event	13-Mar-19	13-Mar-19
71	Easter Bank Holiday	19-Apr-19	22-Apr-19
70	May Bank Holiday	06-May-19	06-May-19

Once selected, you have the ability to **Delete** any of the events in the list.

**EDIT HOLIDAY EVENT GROUP [48 PUBLIC HOLIDAYS]**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#)

Holiday Event Group Name:

Enable Delete  
Click on the Holiday Event Id to edit.

ID	Holiday Event Name	Start Date	End Date	
70	May Bank Holiday	06-May-19	06-May-19	Delete
71	Easter Bank Holiday	19-Apr-19	19-Apr-19	Delete
72	1 Day Event	13-Mar-19	13-Mar-19	Delete

The system will always ask you to confirm your Delete action, ensuring that you do not do this by mistake.

You are about to delete the following Holiday Events:

**70 - May Bank Holiday**

Once your Holiday Events and Holiday Event Groups have been deleted they cannot be retrieved – they will need to be created again using the tools in the portal.

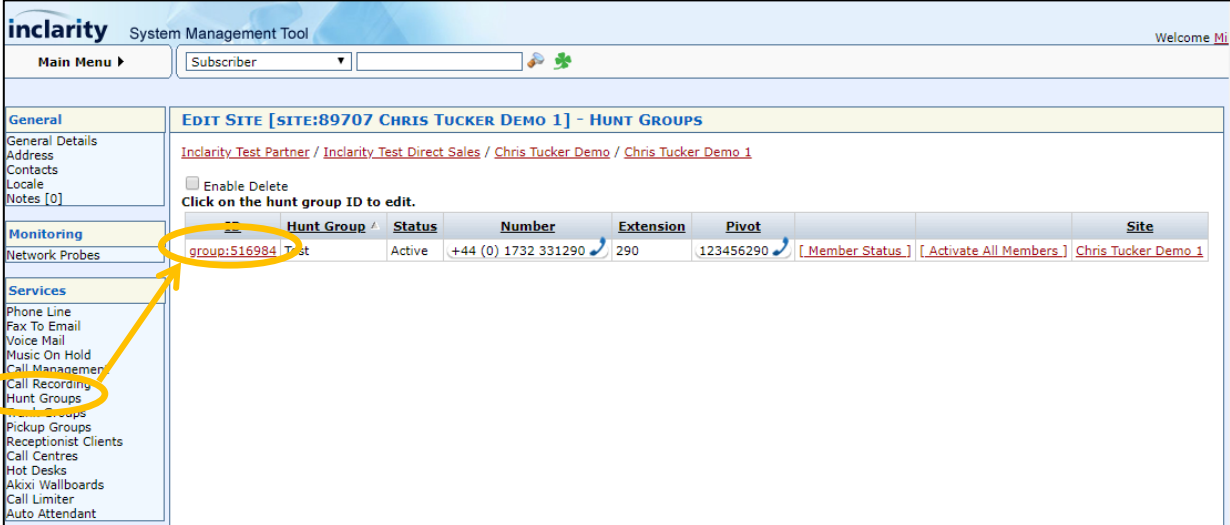
**IMPORTANT:** The system will not let you delete the last Event in the group.



### 3. Applying Holidays to Hunt Groups

Once you have defined at least one Holiday Event Group, it can be used to change the behaviour of your Hunt Groups.

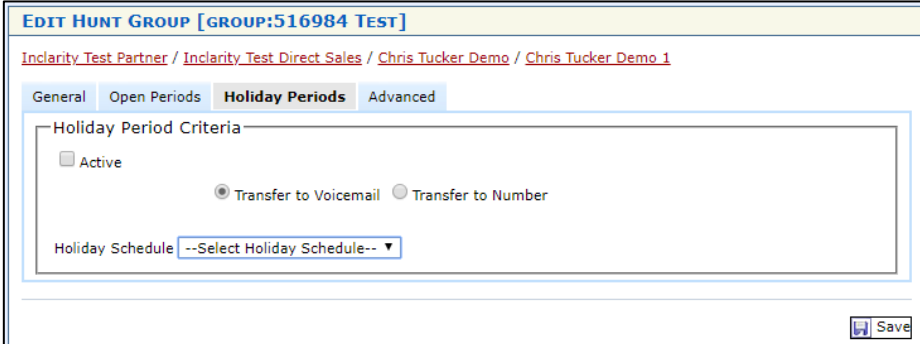
You can manage your Hunt Groups in SMT by navigating to Site level, choosing the **Hunt Groups** menu option and then selecting the relevant group IDs from the list provided.



The screenshot shows the 'inclarity System Management Tool' interface. The main menu includes 'Subscriber' and 'Welcome M'. The left sidebar has a 'Monitoring' section with 'Hunt Groups' highlighted. The main content area is titled 'EDIT SITE [SITE:89707 CHRIS TUCKER DEMO 1] - HUNT GROUPS'. It contains a breadcrumb trail, a 'Enable Delete' checkbox, and a table of Hunt Groups. The table has columns for 'Hunt Group', 'Status', 'Number', 'Extension', 'Pivot', and 'Site'. The first row is 'group:516984 Test' with status 'Active' and number '+44 (0) 1732 331290'. A yellow circle highlights the 'group:516984 Test' entry, and a yellow arrow points from the 'Hunt Groups' menu item in the sidebar to this entry.

Hunt Group	Status	Number	Extension	Pivot	Site
group:516984 Test	Active	+44 (0) 1732 331290	290	123456290	Chris Tucker Demo 1

Within each Hunt Group you will find a tab called **Holiday Periods**.

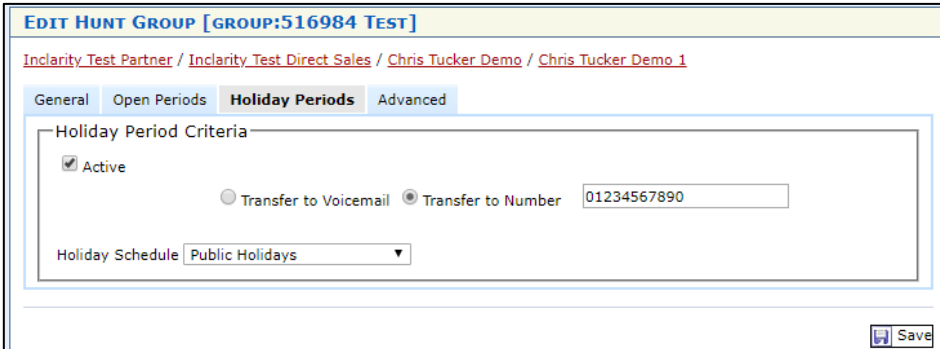


The screenshot shows the 'EDIT HUNT GROUP [GROUP:516984 TEST]' page. The 'Holiday Periods' tab is selected. The 'Holiday Period Criteria' section has an unchecked 'Active' checkbox and two radio buttons: 'Transfer to Voicemail' (selected) and 'Transfer to Number'. Below this is a 'Holiday Schedule' dropdown menu with the text '--Select Holiday Schedule--'. A 'Save' button is at the bottom right.

To use the feature tick the **Active** box, choose the relevant **Holiday Schedule** in the drop-down box and then select the action that should be triggered when the schedule is applicable:

- **Transfer to Voicemail** directs the caller to the voicemail box associated with the group number
- **Transfer to Number** directs the caller to an alternate number that you must define here. This can be a local Inclarity Extension number, or any long telephone number with Inclarity or any other provider.

Below is an example of the feature activated with the **Transfer to Number** option completed:



The screenshot shows the 'EDIT HUNT GROUP [GROUP:516984 TEST]' page. The 'Holiday Periods' tab is selected. The 'Holiday Period Criteria' section has a checked 'Active' checkbox and two radio buttons: 'Transfer to Voicemail' and 'Transfer to Number' (selected). To the right of the 'Transfer to Number' radio button is a text box containing the number '01234567890'. Below this is a 'Holiday Schedule' dropdown menu with 'Public Holidays' selected. A 'Save' button is at the bottom right.

Press **Save** to commit your changes to the system.

**IMPORTANT:** The system will not allow you to choose a Holiday Event Group which does not contain any Holiday Events.



## 4. Applying Holidays to Call Centres

Once you have defined at least one Holiday Event Group, it can be used to change the behaviour of your Standard Call Centres.

**IMPORTANT:** If you have a Premium Call Centre, then you will define your Holiday Event Groups in a similar way, but you will select them in a different place. See the Inclarity Quick Start for Call Centres for more information.

You can manage your Call Centres in SMT by navigating to Site level, choosing the **Call Centres** menu option and then selecting the relevant group IDs from the list provided.

The screenshot shows the Inclarity System Management Tool interface. The main content area is titled 'EDIT SITE [SITE:89707 CHRIS TUCKER DEMO 1] - CALL CENTRES'. Below the title, there is a breadcrumb trail: 'Inclarity Test Partner / Inclarity Test Direct Sales / Chris Tucker Demo / Chris Tucker Demo 1'. There is an 'Enable Delete' checkbox and a prompt to 'Click on the call centre ID to edit.' Below this is a table with the following data:

ID	Call Centre	Status	Number	Extension	Site
group:517003	CCTEST	Active	+44 (0) 1732 331290	290	Chris Tucker Demo 1

Within each Call Centre you will find a tab called **Holiday Periods**.

The screenshot shows the 'EDIT CALL CENTER [GROUP:517003 CCTEST]' page. The 'Holiday Periods' tab is selected. The 'Holiday Period Criteria' section includes:

- Active
- Transfer to Voicemail
- Transfer to Number
- Holiday Schedule: --Select Holiday Schedule--

A 'Save' button is located at the bottom right of the page.

To use the feature tick the **Active** box, choose the relevant **Holiday Schedule** in the drop-down box and then select the action that should be triggered when the schedule is applicable:

- **Transfer to Voicemail** directs the caller to the voicemail box associated with the group number
- **Transfer to Number** directs the caller to an alternate number that you must define here. This can be a local Inclarity Extension number, or any long telephone number with Inclarity or any other provider.

Below is an example of the feature activated with the **Transfer to Number** option completed:

**EDIT CALL CENTER [GROUP:517003 CCTEST]**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#) / [Chris Tucker Demo 1](#)

General | Call Delivery | Agents | Supervisors | Open Periods | **Holiday Periods** | Announcements | Advanced

Holiday Period Criteria

Active

Transfer to Voicemail  Transfer to Number

Holiday Schedule

Press **Save** to commit your changes to the system.

**IMPORTANT:** The system will not allow you to choose a Holiday Event Group which does not contain any Holiday Events.

## 5. Applying Holidays to Receptionists

Once you have defined at least one Holiday Event Group, it can be used to change the behaviour of your Receptionist group numbers.

You can manage your Receptionist group in SMT by navigating to Site level, choosing the **Receptionist Clients** menu option and then selecting the relevant group IDs from the list provided.

**inclarity** System Management Tool

Main Menu ▾ Subscriber

**General**

General Details  
Address  
Contacts  
Locale  
Notes [0]

**Monitoring**

Network Probes

**Services**

Phone Line  
Fax To Email  
Voice Mail  
Music On Hold  
Call Management  
Call Recording  
 Hunt Groups  
 Trunk Groups  
 Pickup Groups  
 **Receptionist Clients**  
 Call Centres  
 Hot Desks  
 Akxi Wallboards  
 Call Limiter  
 Auto Attendant

**EDIT SITE [SITE:89707 CHRIS TUCKER DEMO 1] - RECEPTIONIST CLIENTS**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#) / [Chris Tucker Demo 1](#)

Enable Delete

Click on the receptionist client ID to edit.

ID	Receptionist Client	Status	Number	Extension	Pivot	Site
group:516991	tes	Active	+44 (0) 1732 331289	289	123456289	<a href="#">Chris Tucker Demo 1</a>

Within each Reception Group you will find a tab called **Holiday Periods**:

**EDIT RECEPTIONIST CLIENT [GROUP:516991 TEST]**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#) / [Chris Tucker Demo 1](#)

General CallDelivery Supervisors Operators Monitored Open Periods **Holiday Periods** Announcements

Advanced

Holiday Period Criteria

Active

Transfer to Voicemail  Transfer to Number

Holiday Schedule --Select Holiday Schedule-- ▾

Save

To use the feature tick the **Active** box, choose the relevant **Holiday Schedule** in the drop-down box and then select the action that should be triggered when the schedule is applicable:

- **Transfer to Voicemail** directs the caller to the voicemail box associated with the group number
- **Transfer to Number** directs the caller to an alternate number that you must define here. This can be a local Inclarity Extension number, or any long telephone number with Inclarity or any other provider.

Below is an example of the feature activated with the **Transfer to Number** option completed:

**EDIT RECEPTIONIST CLIENT [GROUP:516991 TEST]**

[Inclarity Test Partner](#) / [Inclarity Test Direct Sales](#) / [Chris Tucker Demo](#) / [Chris Tucker Demo 1](#)

General CallDelivery Supervisors Operators Monitored Open Periods **Holiday Periods** Announcements

Advanced

Holiday Period Criteria

Active

Transfer to Voicemail  Transfer to Number

Holiday Schedule

Press **Save** to commit your changes to the system.

**IMPORTANT:** The system will not allow you to choose a Holiday Event Group which does not contain any Holiday Events.