



Business Communications Manager 3.6

CallPilot Custom Call Routing Guide

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Custom Call Routing

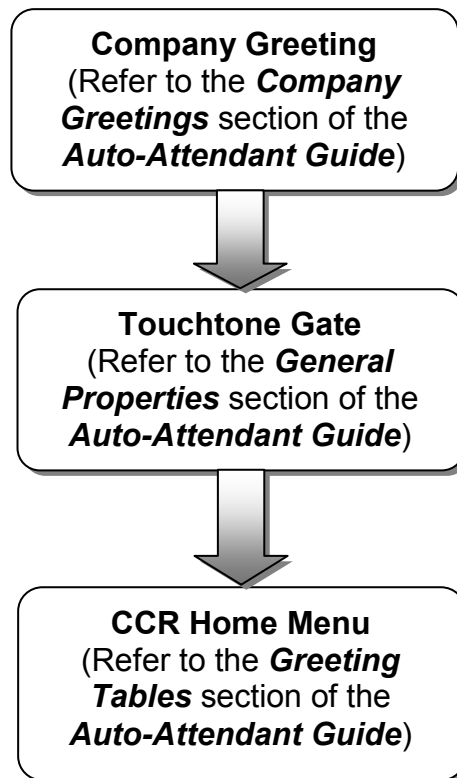
Overview

With Custom Call Routing (CCR) you can replace Automated Attendant (AA) menus with a CCR Tree that offers callers more choices. Callers who reach a CCR Tree hear the CCR Home node immediately after the Company Greeting.

CCR Trees contain paths that callers navigate using their telephone dial pad. By selecting an option from the prompts callers can:

- Hear an Information Message
- Leave a message in a mailbox
- Transfer to an extension or an external number
- Go to a sub-menu

When the caller dials the CCR tree they will be presented with the following options:

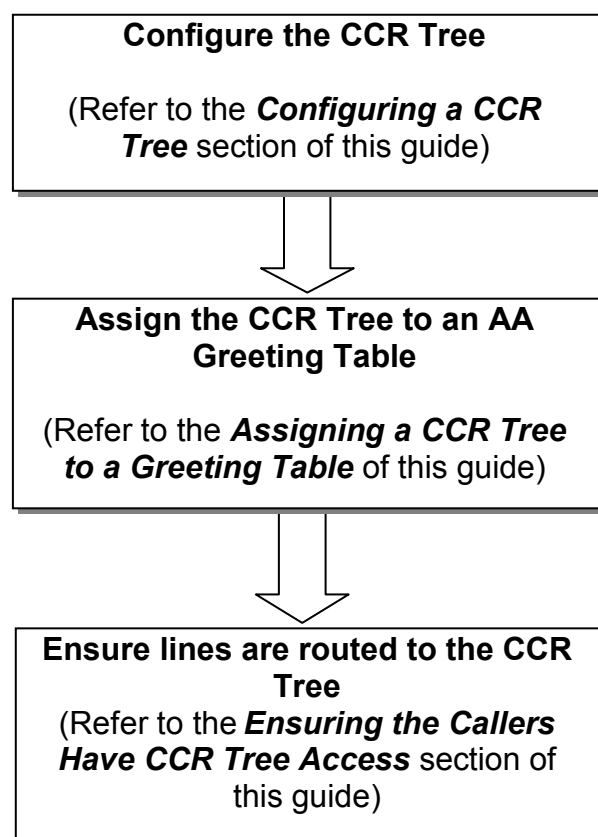


The CCR tree is assigned to an Auto-Attendant Greeting Table, and therefore the CCR Home Menu replaces the Auto-Attendant (AA) menu. However, the AA menu options are still available to the caller.

Note that both the Company Greeting and Touchtone Gate are optional.

Flow Chart

The following flow chart outlines the CCR Tree set up procedure.



Required Information

Before commencing CCR tree construction, it would be useful to make a plan of the required tree functions, such as:

- Identify the frequently called departments and extensions.
- Determine which goods and services the customer may want to promote in Information mailboxes.
- Create mailboxes callers can leave messages in.
- Decide what type of Home node you should create.
- Determine destination types.
- Record prompts and messages. By default, a caller can press 9 to hear prompts in an alternate language or 0 to reach an Operator. These options are not included unless you record them as part of the Home node prompt.

CCR Tree Structure

This section details the various components that formulate a CCR tree.

Home node

After the Company Greeting, a caller hears the Home node message for the CCR Tree. A Home node can offer up to eight options. Callers can select options such as:

- listening to an Information Message in primary or alternate language
- leaving a message
- transferring to an extension or an external number
- choosing from a sub-menu

By default, 0 is reserved for reaching the Operator and 9 offers the menu in the alternate language. The Home node is on Level 0. As sub-menus are added to one another the caller progresses through the levels of the CCR Tree. You can create up to 11 levels (from 0 to 10).

The Home node can be an Information Message. You can program the Home node to play an Information Message. For example:

Come celebrate with us! It's time for Ideal Office Machines' annual get-to-know-our-customers picnic. The annual picnic is on the first Sunday of August from 1:00 to 5:00 p.m. in Thompson Park. See you there.

If the Home node is an Information Message, the caller disconnects at the end of the message. The other destination types do not apply.

Alternative Languages for the Home node prompt

If you record an Alternate Language Home node prompt, you must tell callers about the Alternate Language option in the Home node message. In the Primary Language Home node prompt tell callers to press · if they want to hear the message in the Alternate Language. For example:

To hear this message in [the Alternate Language] press 9. To place an order press 1. To add your name to our mailing list press 2. To reach our sales department press 3. To speak with the receptionist press 0.

Information Message

An Information Message is a message you record to tell callers about goods or services available from your company. You can tell callers about information such as sales, specials, company events, business hours, price lists, and shipping times. For example:

We're pleased to announce the arrival of the new FaxEasy line of fax machines. FaxEasy is easy to operate and produces top quality fax images at an affordable price.

You must create Information mailboxes before you can add an Information Message to a CCR Tree.

Sub-menu

A sub-menu is any menu that callers hear after the Home node. Sub-menus can lead to other sub-menus. A sub-menu is a prompt that provides callers with another list of options. For example, from the Home node a caller can press .to reach the Sales department and hear the sub-menu options:

To place an order press 1. To add your name to our mailing list, press 2. To speak with a Customer Service Representative press 3. To speak with the receptionist press 0.

Mailbox node

Create mailbox nodes to give callers a mailbox where they can leave a message.

For example:

You have reached the Ideal Office Machines Order Desk mailbox. After the tone, leave your name, address, telephone number, and the number of the item you want to order. Thank you.

Destination

The destination is where callers go after they listen to an Information Message or leave a message in a mailbox. Each Information Message and Mailbox node must have a destination:

- Previous: returns the caller to the previous menu
- Home: returns the caller to the Home node
- Disconnect: disconnects the call

You can assign destinations only to Information Messages and Mailbox nodes.

Transfer node

A Transfer node transfers callers to an extension (DN's) or an external number. Callers can also be transferred to Hunt group DN's and Call Center DN's.

Paths

A Path can be a series of menus, Information Messages, Mailboxes or Transfers. A Path number is the digit that callers press to go to the next level in a CCR Tree.

Park and Page node

A Park and Page node parks a call and announces it to a paging zone, overhead paging system or both. Depending on the configuration you select, the page can be repeated until the parked call is answered. An unanswered call returns to the CCR Tree.

Configuring a CCR Tree

The first step in configuring a CCR tree is to create a Home node. If the Home node is a Menu, other options can be added. If the Home node is a Mailbox node, Information node, or Transfer node, no other options need to be added.

Creating the Home Node

The Home node can be one of the following:

- Menu
- Information
- Transfer
- Mailbox

The most common option is a Menu node. However, some customers may require callers to be transferred to a single destination at night-time, e.g. a surgery may require callers to be transferred to a GP's mobile number. In this situation, the Home node would be a Transfer type.

To Create a Home Menu Node

1. Click the **Custom Call Routing** heading. The CCR Tree Administration page appears.

The screenshot shows the Nortel Networks interface for CCR Tree Administration. The navigation menu on the left includes Mailbox Administration, Auto-Attendant, Custom Call Routing (selected), Networking, Call Center, and Reports. The main content area features a table with the following data:

Tree	Status	Command
1	OK	Change
2	Not defined	Create
3	Not defined	Create
4	Not defined	Create
5	Not defined	Create
6	Not defined	Create
7	Not defined	Create
8	Not defined	Create

2. Click the **Create** link for the CCR Tree you want to create. The New CCR Tree page appears.

New CCR Tree

Tree Number: 2

Create Options:

- Home Menu Node
- Home Information Node
- Home Transfer Node
- Home Mailbox Node
- Copy of tree:

Submit

Cancel

3. From the **Create Options** option, select **Home Menu Node**.
4. Click the **Submit** button. The CCR Tree Properties page shows the new CCR Tree.
5. Click the **Change** link for the CCR Tree. The CCR Menu Node Properties page appears.
6. In the **Caption** box, type a caption name, such as *List of options*.

CCR Menu Node Properties

Tree Number: 2

Caption:

Primary Prompt: Not Recorded

Voice...

Alternate Prompt: Not Recorded

Voice...

Submit

Cancel

7. To record the Home node primary and alternate prompts click the **Voice** button and follow the steps in the **Recording Prompts** section of the **Auto-Attendant** guide to record a prompt.
8. Click the **Submit** button.

You should now proceed to the **Adding Nodes to the Home Menu** section.

To Create Other Home Menu Types

1. Click the **Custom Call Routing** heading. The CCR Tree Administration page appears.
2. Click the **Create** link for the CCR Tree you want to create. The **New CCR Tree** page appears.
3. From the **Create Options** option, select the type of Home Node you want to create. If you want to base your new tree on an existing tree, select Copy of tree and select the tree you want to copy.

New CCR Tree

Tree Number:

Create Options:

Home Menu Node

Home Information Node

Home Transfer Node

Home Mailbox Node

Copy of tree: 1

Submit Cancel

4. Click the **Submit** button. The CCR Tree Properties page shows the new CCR Tree.
5. If you are:
 - a) Creating a Home Information Node:
 - i. Click the **Change** link for the CCR Tree. The CCR Info Node Properties page appears.
 - ii. In the **Caption** box type a name for the Information node, such as *Sales*.
 - iii. To record the Information node primary and alternate messages, click the **Voice** button and follow the steps in **Recording Prompts** section of the **Auto-Attendant** guide to record a prompt.

- b) Creating a Home Transfer Node:
- i. Click the **Change** link for the CCR Tree. The CCR Transfer Node Properties page appears.
 - ii. In the **Caption** box type a name for the Transfer node, such as *Sales*.
 - iii. From the **Outdial Method** list box select an outdial method. The outdial method is the telephony resource that is used to transfer the call:
 1. Select **Line** to use an external line to transfer the caller to an external telephone number, and enter the line number you want to use.
 2. Select **Pool** to use a line pool to transfer the caller to an external telephone number and enter the Line Pool number you want to use.
 3. Select **Route** to use a Routing Code to transfer the caller to an external telephone number.
 4. Select **Intercom** to transfer the caller to an extension.
 5. In the **Phone Number** box, type the extension or external telephone number. Depending on the Outdial Method you may need to precede the telephone number with – for example – routing digits.
- c) Creating a Home Mailbox Node
- i. Click the **Change** link for the CCR Tree. The CCR Mailbox Node Properties page appears.
 - ii. In the **Mailbox Number** box type the extension of the mailbox you want calls to transfer to.
 - iii. Click the **Submit** button.

For the above type of Home Nodes the CCR tree is now complete.

Adding Nodes to the Home Menu

If the CCR tree has a Home Menu node, other nodes may now be added to that node. Options to add to the Home Menu are:

- Transfer Nodes
- Information Nodes
- Mailbox Nodes
- Sub-Menu Nodes

Adding a Transfer Node

1. Click the **Custom Call Routing** heading. The CCR Tree Administration page appears.
2. Click the **Change** link for the CCR Tree that you want to add a Transfer node to. The CCR Tree Properties page appears.

3. Click the **Transfer** link. The new Transfer node appears on the CCR Tree Properties page.
4. Click the **Change** link for the Transfer node. The CCR Transfer Node page appears.

CCR Transfer Node Properties

Tree Number: 2
Assigned Key: 1

Caption:

Outdial Method: (Line/Pool #)

Phone Number:

5. In the **Caption** box type where you are transferring the caller to, for example *Sales*.
6. From the **Outdial Method** list box select an outdial method. The outdial method is the telephony resource that is used to transfer the call:
 - a. Select **Line** to use an external line to transfer the caller to an external telephone number, and enter the line number you want to use.
 - b. Select **Pool** to use a line pool to transfer the caller to an external telephone number and enter the Line Pool access code you want to use.
 - c. Select **Route** to use a Routing Code to transfer the caller to an external telephone number.
 - d. Select **Intercom** to transfer the caller to an extension.
7. In the **Phone Number** box, type the extension or external telephone number.
8. Click the **Submit** button.

Adding an Information Node

1. Click the **Custom Call Routing** heading. The CCR Tree Administration page appears.
2. Click the **Change** link for the CCR Tree that you want to add an Information node to. The CCR Tree Properties page appears.

CCR Information Node Properties

Tree Number: 2
Assigned Key: 1
Caption: Opening Hours
Destination: Home
Primary Prompt: Disconnect
Alternate Prompt: Not Recorded

Buttons: Voice..., Voice..., Submit, Cancel

3. Click the **Information** link. The new Information node appears on the CCR Tree Properties page.
4. Click the **Change** link for the Information node. The CCR Information Node Properties page appears.
5. In the **Caption** box type a caption that describes the information, for example, *Store Location and Hours*.
6. From the **Destination** list box, select a destination. The destination is the location on the CCR Tree that callers go to after the Information message plays:
 - a. **Previous:** returns to the Previous menu node
 - b. **Home:** returns the call to the Home node prompt
 - c. **Disconnect:** disconnects the call
7. To record the Primary and Alternate prompts, click the **Voice** button and follow the steps in the **Recording Prompts** section of the **Auto-Attendant Guide**. These prompts are the information message that the caller hears when they are routed to this node.
8. Click the **Submit** button.

Adding a Mailbox Node

Adding a mailbox node gives callers a mailbox where they can leave a message or listen to an Information Message, depending on the mailbox type.

Use a Mailbox node to transfer callers to a Subscriber, Information or Fax On Demand mailbox.

1. Click the **Custom Call Routing** heading. The CCR Tree Administration page appears.
2. Click the **Change** link for the CCR Tree that you want to add a Mailbox node to. The CCR Tree Properties page appears.
3. Click the **Mailbox** link. The new Mailbox node appears on the CCR Tree Properties page.
4. Click the **Change** link for the Mailbox node. The CCR Mailbox Node page appears.

CCR Mailbox Node Properties

Tree Number: 3
Assigned Key: 4
Mailbox Number: GENERAL_DELIVERY,MB
Mailbox Type: **General Delivery**
Destination:

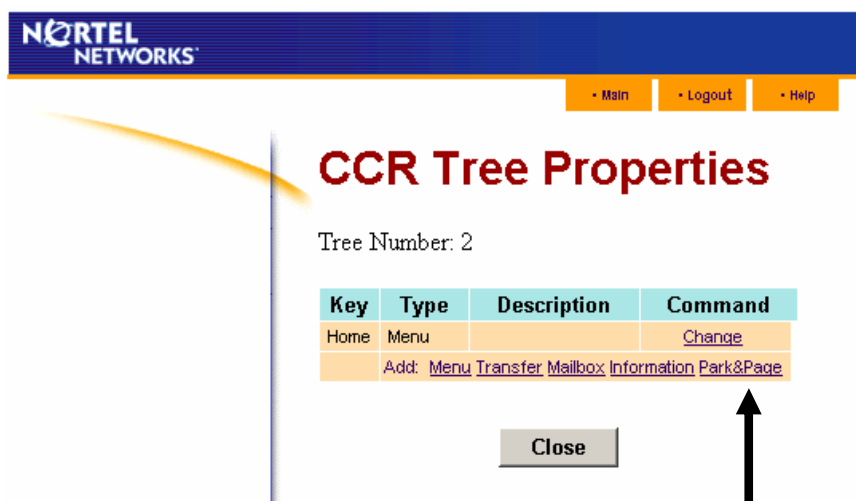
5. In the **Mailbox Number** box type the mailbox number of the Subscriber, Information, or Fax on Demand mailbox you want the call to transfer to. You must create the mailbox before you can assign it to a Mailbox node.
6. From the **Destination** list box, select a destination. The destination is the location on the CCR Tree that callers go to after they leave a message:
 - a. **Previous:** returns to the Previous menu
 - b. **Home:** returns the call to the Home node prompt
 - c. **Disconnect:** disconnects the call
7. Click the **Submit** button.

Adding a Park & Page Node

A Park and Page node parks a call and announces it to a paging zone, overhead paging system or both. The page can be repeated until the parked call is answered. Calls that are unanswered due to the page being unanswered return to the CCR Tree.

To add a Park and Page node

1. Click the **Custom Call Routing** heading.
2. Click the **Change** link for the CCR Tree that you want to add Park & Page node.
3. The CCR Tree Properties page appears.
4. Click the Park &Page link.



5. The new Park & Page node appears on the CCR Tree Properties page.
6. Click the **Change** link for the Park and Page node.



7. The **CCR Park and Page Node Properties** page appears.

The screenshot shows the 'CCR Park and Page Node Properties' configuration page. At the top, there is a blue navigation bar with links for 'Main', 'Logout', and 'Help'. Below this, the page title 'CCR Park and Page Node Properties' is displayed in red. The form contains the following fields and controls:

- Tree Number:** 2
- Path:** 1
- Caption:** An empty text input box.
- Transfer DN:** An empty text input box.
- Transfer Before Page:** An unchecked checkbox.
- Page Type:** A dropdown menu currently set to 'Internal Zone'.
- Paging Zone:** A dropdown menu currently set to '1'.
- Page Retries:** A dropdown menu currently set to '1'.
- Retry Interval:** A text input box containing '15' with '(5-300 seconds)' in smaller text to its right.
- Primary Prompt:** A label followed by 'Not Recorded' and a 'Voice...' button.
- Alternate Prompt:** A label followed by 'Not Recorded' and a 'Voice...' button.
- At the bottom, there are 'Submit' and 'Cancel' buttons.

8. In the Caption box type a name for where you are paging the caller to, for example Support. The caption can be a maximum of 50 characters.
9. If you want to transfer the call to an extension before you park and page it, in the **Transfer DN** box type the extension you want to transfer the call to. If the call is not answered at this extension it returns to the CCR Tree and a Park and Page is performed. If you leave this box clear the call is immediately parked and paged.
10. Select the **Transfer Before Page** check box if you want to transfer the call to the extension you specify in the Transfer DN box before it is parked and paged.
11. If you define a **Transfer DN** but do not select the **Transfer before page** check box, the call is parked, and is transferred to the DN after all of the page retries are tried.
12. From the **Page Type** list select the page type you want to use: internal zone, overhead paging or both. The default is internal zone.
13. From the **Paging Zone** list select a number from 1 to 6, or All
14. From the **Page Retries** list select a number from 1 to 5 that is the number of times the system will try to page to the paging zone. The default is 1.

15. In the **Retry Interval** box type The number of seconds between paging retries. The retry time is measured from the end of the playback of the page. The range is 5-300 seconds. The default is 15 seconds.
16. Click the **Voice** buttons for the **Primary and Alternate prompts** and record your primary and alternate recordings. These recordings are played over the paging zone or overhead paging system, followed by the park string. For example if you record “Support please pick up.” CallPilot can play “Support, please pick up 101”. If you have not recorded Customized Digits the “101” is in the system voice. If you have recorded Customized Digits the entire prompt is played in your voice.
17. Click the **Submit** button.

Recording Customised Digits

You can record customized recordings for the digits 0 to 9 in the primary and alternate languages. If you select the Use Customized Digits check box, Customized Digits are used to play the park code in your voice, for example, “Support call on 101.”

If you select the Use Customized Digits check box you must record recordings for every Customized Digit. If your system is bilingual you must record recordings in the primary and alternate languages.

1. Click the **Auto-Attendant heading** and click the **Customized Digits** link.

The screenshot shows the Nortel Networks web interface for 'Lines Administration'. The top navigation bar includes 'Main', 'Logout', and 'Help' links. The left sidebar menu is expanded to show 'Auto-Attendant' options, including 'Customized Digits', which is highlighted by a black arrow. The main content area displays a table with the following data:

Line	Answer Mode	Table/Skillset	Rings	Command
1	No	---	0	Change
2	No	---	0	Change
3	No	---	0	Change
4	No	---	0	Change
5	No	---	0	Change
6	No	---	0	Change
7	No	---	0	Change
8	No	---	0	Change
9	No	---	0	Change

- The **Customized Digits** page appears.

Digit	Status		Command	
	Primary	Alternate	Primary	Alternate
0	Not Recorded	Not Recorded	Voice	Voice
1	Not Recorded	Not Recorded	Voice	Voice
2	Not Recorded	Not Recorded	Voice	Voice
3	Not Recorded	Not Recorded	Voice	Voice
4	Not Recorded	Not Recorded	Voice	Voice
5	Not Recorded	Not Recorded	Voice	Voice
6	Not Recorded	Not Recorded	Voice	Voice
7	Not Recorded	Not Recorded	Voice	Voice
8	Not Recorded	Not Recorded	Voice	Voice
9	Not Recorded	Not Recorded	Voice	Voice

- For digits 0 to 9, click the Voice links and record your customized digit recording.” In your recording say the name of the digit, for example, “three”.
- Record alternate Customized Digits recordings if your system uses an alternate language.
- Click the **Auto-Attendant** heading.
- Click the **General Properties** link.

Line	Answer Mode	Table/Skillset	Rings	Command
1	No	---	0	Change
2	No	---	0	Change
3	No	---	0	Change
4	No	---	0	Change
5	No	---	0	Change
6	No	---	0	Change
7	No	---	0	Change
8	No	---	0	Change
9	No	---	0	Change

- The **Auto-Attendant Properties** page appears.

- Click the **Use customized digits** check box.

NORTEL NETWORKS

• Main • Logout • Help

Auto-Attendant Properties

Return to Auto-Attendant:

Touchtone Gate:

Use customized digits:

- Click the **Submit** button.

Adding a Sub-Menu Node

Create a Menu node to organize choices for your callers, or when you have more choices than can fit on one menu.

- Click the **Custom Call Routing** heading. The CCR Tree Administration page appears.
- Click the **Change** link for the CCR Tree that you want to add a Menu node to. The CCR Tree Properties page appears.
- Click the **Menu** link. The new Menu node appears on the CCR Tree Properties page.
- Click the **Change** link for the Menu node. The CCR Menu Node Properties page appears.

CCR Menu Node Properties

Tree Number: 3

Assigned Key: 2

Caption:

Primary Prompt: Not Recorded

Alternate Prompt: Not Recorded

- In the **Caption** box type a caption for the node.
- To record the Primary and Alternate prompts, click the **Voice** button and follow the steps in the **Recording Prompts** section of the **Auto-Attendant** guide.

7. Click the **Submit** button.

An Example of a Finished Tree

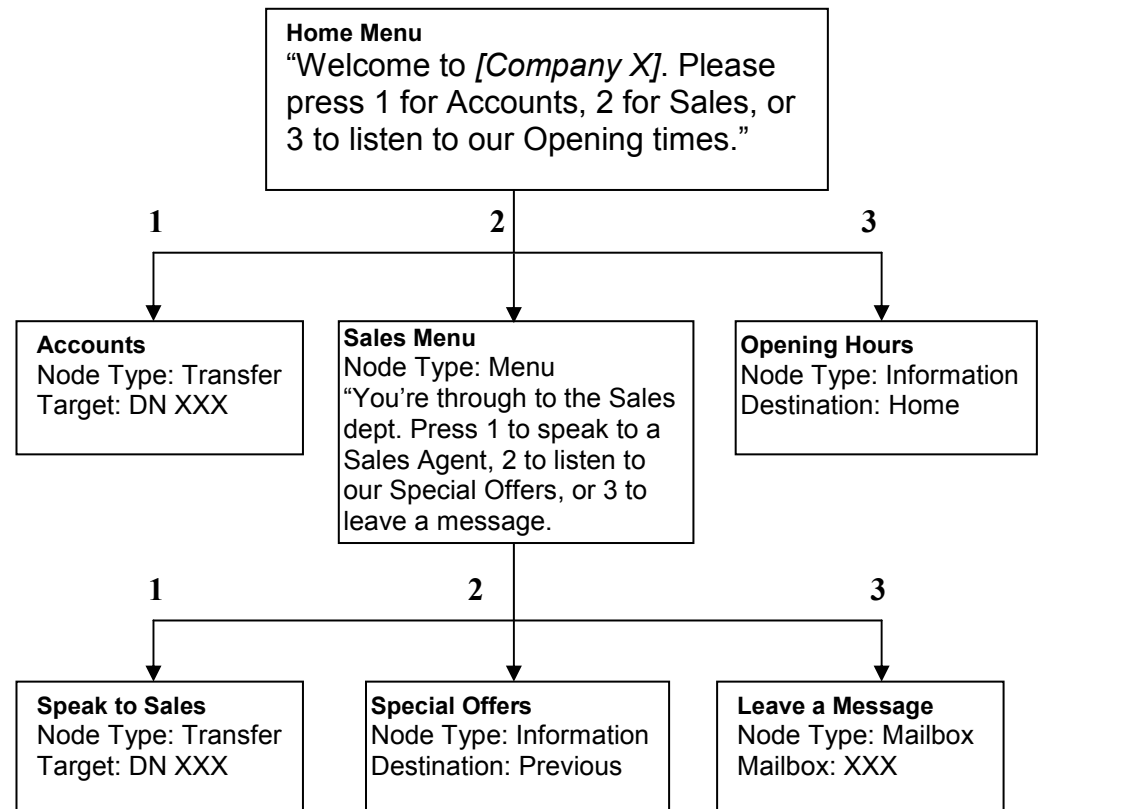
When the CCR tree has been completed it may look like the following example.

The screenshot shows a web interface titled "CCR Tree Properties" for "Tree Number: 2". It features a table with the following data:

Key	Type	Description	Command
Home	Menu		Change
Add: Menu Transfer Mailbox Information Park&Page			
1	Transfer	Transfer to Accounts	Change Delete
2	Menu	Sales Menu	Change Delete
Add: Menu Transfer Mailbox Information			
. 1	Transfer	Speak to Sales	Change Delete
. 2	Info	Special Offers	Change Delete
. 3	Mailbox	GENERAL_DELIVERY,MB	Change Delete
3	Info	Opening Huors	Change Delete

Below the table is a "Close" button.

Note that the options originating from a Sub-Menu are denoted by a “dot”, and the more Sub-Menu levels are created, the more “dot’s” there will be. The above CCR tree can be represented from the callers’ perspective as follows:




Assigning a CCR Tree to an Auto-Attendant Table

The CCR tree has to be assigned to an Auto-Attendant Greetings Table to give callers the ability to access it. For more information on Greetings Tables refer to the *Auto-Attendant* guide.

To assign a CCR Tree to a Greeting Table

1. Click the **Auto-Attendant** heading.
2. Click the **Greeting Tables** link. The Greeting Tables page appears.
3. Click the **Change** link for the Greeting Table you want to assign a CCR Tree to. The Greeting Table Setup dialog box appears.
4. Select from each **CCR Tree** list box the CCR Tree you want calls to route to for each time of day. If you do not want calls to route to a CCR Tree select **None**.

Greeting Table 1 Setup

	Morning	Afternoon	Evening	Non Business
Greeting:	1 ▾	1 ▾	1 ▾	1 ▾
CCR Tree:	1 ▾	1 ▾	1 ▾	1 ▾ 
Monday:	12:00 AM	12:00 PM	6:00 PM	6:00 PM (eg 12:00 AM)
Tuesday:	12:00 AM	12:00 PM	6:00 PM	6:00 PM (eg 12:00 AM)

5. Click the **Submit** button.

Ensuring the Caller's Have CCR Tree Access

Before callers can access the CCR tree, lines must be routed to the Greeting Table in Auto-Attendant Lines Administration.

Also, do not forget to check that Call Pilot is set to answer calls. This option is found in the Operator Settings.

For information on the above issues, refer to the *Auto-Attendant* guide.

Making Changes to a CCR Tree

If it is necessary to make changes to a CCR tree, you must first ensure that the callers do not experience disruption. Therefore, any reference made to the CCR tree you wish to change should be removed from the Greeting Table.

Before this is done, you may find it useful to make a copy of the original tree to substitute whilst changes are made.

Copying a Tree

To make a copy of a tree:

1. Click the **Custom Call Routing** heading. The CCR Tree Administration page appears.
2. Click the **Create** link to create to create a new CCR Tree. The New CCR Tree page appears.
3. From the **Create Options** option, select **Copy of tree**, and select the tree you need to copy.

New CCR Tree

Tree Number:

Create Options:

Home Menu Node

Home Information Node

Home Transfer Node

Home Mailbox Node

Copy of tree: ←

4. Click the **Submit** button.
5. The CCR Tree Properties page will appear. Click the **Close** button.

Removing References to a CCR Tree from a Greeting Table

1. Click the **Auto-Attendant** heading.
2. Click the **Greeting Tables** link.
3. Click the **Change** link for the Greeting Table that uses the CCR Tree that you want to disable. The **Greeting Table Setup** page appears.

Greeting Table 1 Setup

	Morning	Afternoon	Evening	Non Business
Greeting:	1	1	1	1
CCR Tree:	1	1	1	1
	<div style="border: 1px solid black; padding: 2px;"> None 1 2 3 </div>			
Monday:	12:00 AM	12:00 PM	6:00 PM	6:00 PM (eg 12:00 AM)
Tuesday:	12:00 AM	12:00 PM	6:00 PM	6:00 PM (eg 12:00 AM)
Wednesday:	12:00 AM	12:00 PM	6:00 PM	6:00 PM (eg 12:00 AM)
Thursday:	12:00 AM	12:00 PM	6:00 PM	6:00 PM (eg 12:00 AM)
Friday:	12:00 AM	12:00 PM	6:00 PM	6:00 PM (eg 12:00 AM)
Saturday:	12:00 AM	12:00 PM	6:00 PM	6:00 PM (eg 12:00 AM)
Sunday:	12:00 AM	12:00 PM	6:00 PM	6:00 PM (eg 12:00 AM)

4. For each time of day, remove the CCR Tree you want to disable by choosing another CCR Tree number (e.g. the copied version of the original) or **None** from the **CCR Tree** list box.
5. Click the **Submit** button.

It is now possible to safely make changes to the original CCR tree.

When finished, follow the above procedure to route calls through to the altered CCR Tree.

Nortel Documentation Links

- [Business Communications Manager 3.6 CallPilot Manager Set Up and Operation Guide](#)
- [Business Communications Manager 3.6 CallPilot Programming Record](#)
- [Business Communications Manager 3.6 CallPilot Reference Guide](#)

