

Inbound IVR Messaging for I-Tel

Basic elements for IB (Inbound) IVR Messaging:

- The initial inbound call path needs to be set up in the INBOUND CALL ROUTE by DNIS.
- If the inbound call DNIS is recognized, the setup in the Config.xml will say which IVR script to use.
- An IVR Script is mapped to the 'Dual Tones' which are the assigned telephone keypad numbers. (For example – PRESS 1 TO MAKE A PAYMENT). If an assigned number on the telephone keypad is depressed, the caller might hear a message, get routed directly to a hunt group or get routed to an assigned extension.
- If the call is to be transferred to a hunt group, the Softdial will look in the Script XML for the Queue (HG) code. The code will also need to be set-up in the Name Space Editor.
- If the Queue (Hunt group) is setup in the Name Space Editor correctly, it will then communicate with the iSeries for a Hunt group with that IDENTICAL name (Extension).
- On the iSeries, the Hunt group will have the extensions listed that are eligible to receive this call.

What's involved in setting up Inbound IVR?

- a. How many Inbound #'s will you have? - For example, you may want to have 2 numbers for folks to call. When they call one of these numbers, a script will play. Then based on the callers input from their telephone keypad, the caller will be routed to the:
 - Mailing address
 - Balance on their account
 - Setting up a Payment Arrangement
 - Making a Credit Card Payment
- b. What is the DNIS for each? - This is the 3-10 digit code assigned to the actual phone number for the carrier. Usually, a number e.g. 800.555.3000 would have a DNIS = 3000, or 5553000 or maybe 8005553000.
- c. How many Inbound IVR agents will you need? - You will need to figure out how many Inbound calls you can handle simultaneously...this will have much to do with how many PRI's you have and how many calls you have passing through the PRI at a given time. We will need to go over this with you.
- d. Will more licenses be needed? - If you have 10 licenses and you have 10 agents, you will need to get a license to set-up an IVR agent.
- e. A Standard script will be provided - The Standard Script has many features available. You Can:
 - Verify the Debtor
 - Retrieve the Mailing address
 - Retrieve a Balance
 - Set up a Payment Arrangement
 - Enter a down payment
 - Enter installment amount
 - Set up a Direct Check
 - Make a Credit Card payment
 - Jump out of the script and talk to an agent
- f. Send Initial Greeting info and Address info to Quantrax - When folks call the Inbound number, a Main Greeting will need to be recorded so the caller will be notified where they are calling. Another recording will need to be done that includes your mailing address. **So, we will need these typed out for us to record.**
- g. Design Call Flow on paper - It would be best to outline on paper where the caller will be directed if they jump out of the script. So, when a caller decides to jump out of the script

and talk to an agent, do you want to send this caller to go to a specific extension OR to a Hunt Group. The Hunt Group could be set up with 2-XX number of agents so that callers can go to a group of agents. This will help to ensure that the caller will get to speak to an agent and set up a payment or discuss the bill.

- h. Dialer Handbook - There will be items that you will need to set up on the dialer PC and in Intelec, so you will need the latest copy of our dialer handbook.
- i. . wav files – There will be a handful of wav files that will need to be uploaded to your dialer PC. These are the files that will play as the caller moves through the script.
- j. Create Inbound Call Route(s) – This is the initial path for a call to come in. It is triggered by the DNIS set up in the dialer PC.
- k. Create a hunt group(s) – When the caller jumps out of the inbound script, you will need to let the system know where to direct the caller. A Hunt Group can be set up to allow inbound calls to go to a group of agents and if those agents are busy, direct the caller to go to a secondary hunt group.
- l. Create IB IVR agents (NNE’s) – Initially when a caller comes through the inbound script, the system will need to have a Non-Nailed up extension (NNE) to take the call (play the script). **The NNE is tied up for that call.** So, if you have a second simultaneous inbound caller, you will need to set up a second NNE. Therefore, if you expect to have or allow 5 simultaneous inbound IVR callers, you will need to set up 5 NNE’s and you will need to have 5 licenses available concurrently.
- m. Create user IVRITEL in Intelec – You will need to create this user for notes and smart codes applied by the IVR.
- n. Create Sound Resource names - This is another name for the Wav Names. Wav files will be called during the script process, so these names need to be set up in the dialer PC.
- o. Create 5 Smart codes – During the IVR process, the system will be able to apply smart codes for:
 - Requesting the Mailing Address
 - Requesting the Next Payment Due
 - Setting up a Payment Arrangement
 - Setting up a Credit Card Payment
 - Setting up a Direct Check Payment
- p. Modify config’s - 3 specific config’s will need to be modified in the Softdial folder. This is needed so the IVR can call the correct script, play the correct wav files and route to the correct hunt groups, etc. They are:
 - a. Script
 - b. Sch

- c. Stg
- q. Create an ODBC connection – You will need a ‘link’ to the datasources from Inteltec.
- r. Verify TTS engine exists – The TTS engine will be needed for Text To Speech capability.
- s. Verify iSeries/dialer code – Quantrax will need to verify that all proper iSeries/Inteltec and dialer code is updated.
- t. Make sure the User ID IVRITEL is created with the **password QIVR124#**.
- u. **Recycle Services after making ALL changes**

Installing IB IVR Messaging

A. Make sure the standard script is located in c:\softdial\SCR2\scripts\


Please contact us, we will forward the standard IB script to you.

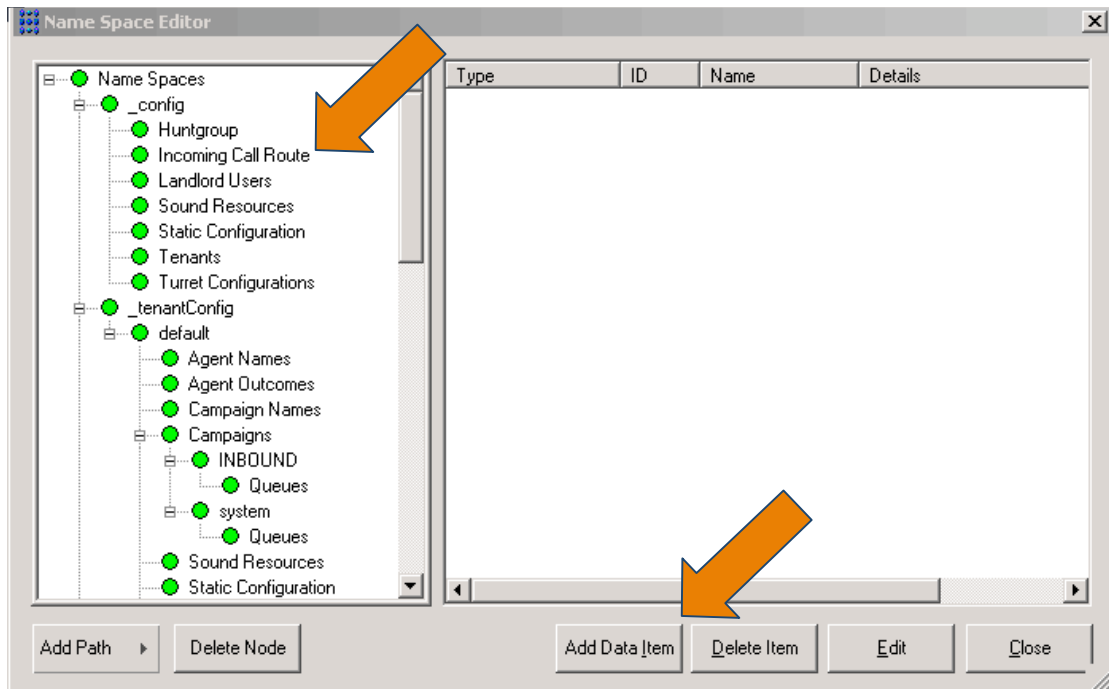
- STD (includes options for Credit Card, Direct Checks and Payment Arrangements)

B. Make sure the script config.xml is located in c:\softdial\SCR2\scripts\

We also have a standard SCR2 script config available.

C. Create 5 Smart Codes to be used in the Script (leave note)

1. The following set-up will introduce standards we have chosen.
2. Select the INBOUND number folks will call to reach the inbound interactive messaging. For example, the number 800.555.2652 (our standard) is selected to be broadcast to your debtors.
3. The DNIS assigned to this number may be 2652.
4. Set up the Inbound Call Route in the Name Space Editor on the dialer PC. Right click on the  icon on the bottom right side. Go to Name Space Editor and open. Then move down to Inbound Call Route. Click on Inbound Call Route. Click on 'Add Data Item'.



5. Fill in the ID and DNIS fields with the DNIS 2652. Then fill in the Route Name and Description fields with a description that would help you recognize the type of call.

The screenshot shows a dialog box titled "Incoming Call Route Editor". It contains the following fields and values:

ID	2652
Route Name	Standard IB IVR
Description	800.555.2652
CLI	
DNIS	2652
Destination Address	600999

At the bottom of the dialog are "OK" and "Cancel" buttons. Two orange arrows point to the ID and Destination Address fields.

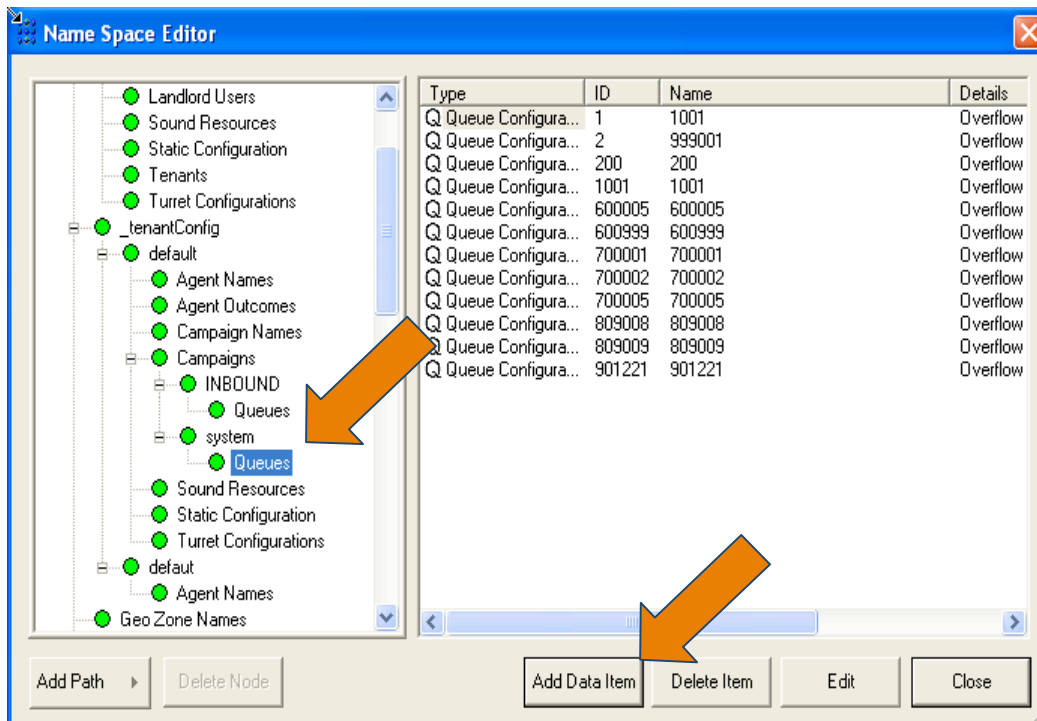
6. The Destination Address will be the Hunt Group you create that has the IB IVR members. **The standard chosen is 600999.**
7. Design the call flow on paper. When someone calls 800.555.2652 they will be directed to the Inbound IVR - interactive messaging. If they need to speak to someone, where do you need the call to go? Do they need to be directed to a reception hunt group, an agent hunt group or a specific extension?
8. We have standardized the naming convention for hunt groups (Destination Address)

However, when you need to use the 600000, you may want to use 602652 and incorporate the DNIS in the name. For a multiple extension, you could use 700001,2,3 etc because agents will be a part of the hunt group. For the 800000 series you should use the agents extension so if the extension is 2295, the destination address will 802295. Lastly, for NNE's, the same procedure

can be used as described for the IVR...if the DNIS is 2360, the NNE address WILL be 902360, since the intelc/**itel** will control this aspect.

FYI -

- a. 500000 – Blended Inbound
 - b. 600000 – IVR
 - c. 700000 – **multiple** extensions
 - d. 800000 – **single** extension
 - e. 900000 – NNE's
9. We have selected Hunt Group 600999, a **group** of IVR agents.
10. Go back to the Name Space Editor and select Queues (Hunt Group). For V10 you need to select System Queues under tenant.



11. Click on System Queues (Hunt Group) and then click on 'Add Data Item'

Queue Configuration

Identity

ID: 600999

Queue Address: 600999

Description: IB IVR HG

Timers

NOTE: All timer values are in seconds

Agent RNA time (sec): 15

Overflow time: 60

Queue time warning threshold: 20

Queue time error threshold: 40

Timed reminder interval: 0

Behaviour

Overflow address: []

Overflow on group busy immediately:

Round-Robin group:

Queue priority relative to other queues in campaign: 0

In-Queue Messaging

Queue entry (mandatory): []

Queue busy on entry greeting: []

Queue Hold Music Loop: []

Queue timed reminder greeting: []

Application Routing

Allow application to determine route:

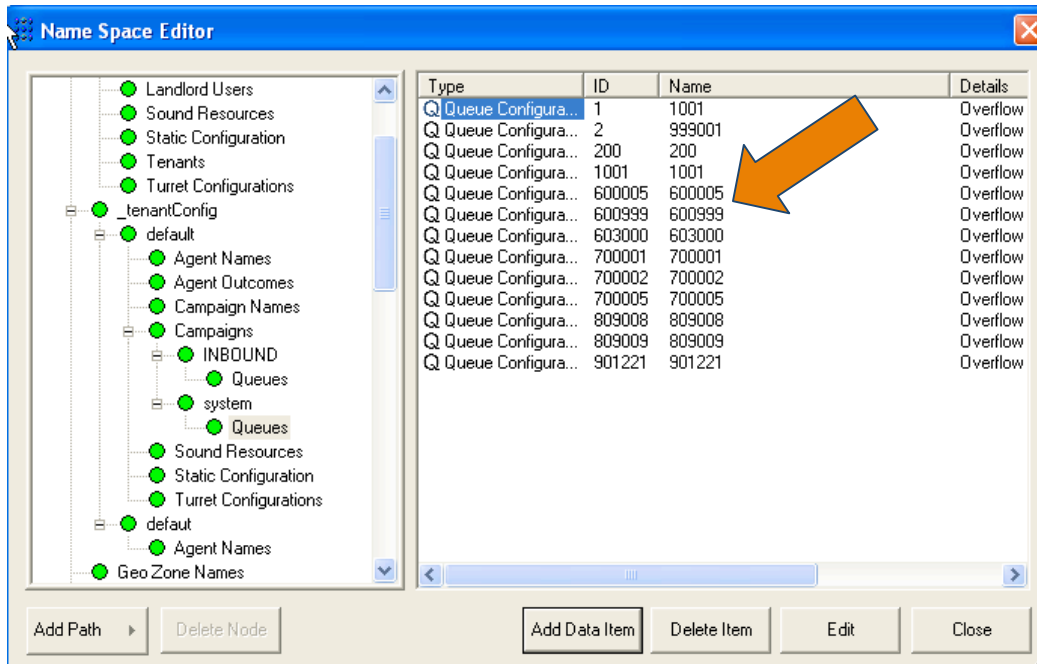
App Route timeout (sec): 5

OK Cancel

12. The ID and Address will be the new hunt group/queue address.

13. Description can be used to describe the type of routing.

14. You do not need an overflow address for this setup...or group busy



You have created Queue (Hunt Group) 600999. Now you need to do the same on the iSeries side. Go to Intelc.



15. Go to the I-Tel menu and select option 4 'Management Options'

```

MENU: ITLOPT
I-Tel Management Options
Date : 7/25/08
Time : 12:09:43

1. Hunt groups
2. Hunt group status
3. Agent status
4. Do not call numbers
5.
6.
7. Duplicate disposition codes by company

10. I-Tel server status

20. Delete call history by date range

Ready for option ___
F7-Exit

```

16. Select option1 for Hunt Groups (Queues)

```

Hunt Groups
7/25/2008 13:27:20
System: S10E9B6C

Position to . . . . . Starting value

Type options, press Enter.
2=Change 3=Copy 4=Delete 5=Display 6=Print 8=Group members

Opt Group Code Group Name Group Address Dialer Code
_ clerical clerical 600001 A
_ inbound ts inbound test 700999 A
_ ivr ob 825 ivr ob test kick out 825 700002 A
_ BIB blended ib hunt group 600888 A
_ CBoverflow cb overflow frm 700999 1001 A
_ Group test Testing group 700001 700001 A
_ 1000 IB IVR for Berlin Testing 1000 2
_ 500999 Standard Blended IB 500999 A
_ 600999 IB IVR test 600999 A
_ 603000 IB IVR for Medical 603000 A
_ 609001 IB Berlin 609001 2

More...

F3=Exit F5=Refresh F6=Create F2=Cancel
F14=Previous view F15=Next view F17=Top F18=Bottom F21=Print list

```

17. Press F6 to create the Hunt Group

```
                                Create Hunt Groups                               8/20/2008 14:14:56
                                                                                   System: S10E9B6C

Type choices, press Enter.

Group code . . . . . 600999
Group name . . . . . IB IVR HG
Group address . . . . . 600999
Inbound campaign name (blank = system) . . . . .
Voicemail extension . . . . .
Company number . . . . . 99
Dialer code . . . . . A
Hunt group type (S=Static) . . . . .

F3=Exit  F5=Refresh  F12=Cancel
```

18. Set up Queue (HG) 600999 as shown. Hit Enter.

19. Now set up standard IB IVR agent(s). We have set up a standard to work with...

- IVRIB01 9501
- IVRIB02 9502
- IVRIB03 9503
- IVRIB04 9504
- IVRIB05 9505

20. We have associated a non-valid extension 9501 and an IVR agent name. The extension does not need to be a valid extension on the PBX – for IVR agents, it should not be valid. Our standard naming convention is IVRIB01. Decide how many agents you will need and enter them now....you can always add more. Remember, these agents only take up a license *when active*.

```

Company: 99          MENU: ITLOPT          Date : 7/25/08
                   I-Tel Options menu    Time : 13:32:01
-----
1. I-Tel campaign administrator      13. Queue consolidation options
2. Display active campaigns          14. Contact series options
3.                                   15. Non-Intelec users
4. Management options                16. I-Tel System Control options
5.                                   17. Support options
6. Other phone number options        18.
7.                                   19.
8.                                   20.
9. I-Tel dialer reports              21.
10.                                  22. Return to main menu
11. Multiple dialer selection        23.
12.                                  24.

50. Custom options

                                INTELEC
                                © Copyright Quantrax Corporation Inc. 2008

Ready for option  _

IOU OWE-IT COLLECT SERVICES, INC. 8.25          User : MICHELLE

```

21. Select Option 15 (Option is the same for releases prior to 8.25) Non-intelec users. Create IVRIB01 as an agent and assign the extension 9501 to this agent.

```

                                Work with Non-Intelec Users          7/25/2008 13:34:45
                                System: S10E9B6C

Position to . . . . . Starting value

Type options, press Enter.
  2=Change  3=Copy  4=Delete  5=Display  6=Print

Dialer
Opt Code  User      Extension
-  A      IVRIB01    9501
-  A      RECEPTION  999

F3=Exit  F5=Refresh  F6=Create  F12=Cancel
F17=Top  F18=Bottom  F21=Print list
Copyright (c) 2005 by Quantrax Corporation.

                                Bottom

```

22. Hit F6 to create the IB IVR agent.

```
Display Non-Intelec Users 7/25/2008 13:39:37
System: S10E9B6C

Press Enter to continue.

Dialer code . . . . . : A
User . . . . . : IVRIB01

Extension . . . . . : 9501

Is This a IVR Agent (Y/N)? . . . . .

F3=Exit F5=Refresh F12=Cancel
```

23. Fill in the fields as shown.

```
Work with Non-Intelec Users 7/25/2008 13:34:45
System: S10E9B6C

Position to . . . . . _ Starting value

Type options, press Enter.
2=Change 3=Copy 4=Delete 5=Display Print

Dialer
Opt Code User Extension
_ A IVRIB01 9501
_ A RECEPTION 999

Bottom

F3=Exit F5=Refresh F6=Create F12=Cancel
F17=Top F18=Bottom F21=Print list
Copyright (c) 2005 by Quantrax Corporation.
```

24. Now you have your IB IVR agent set up...

```

          Hunt Groups                               8/20/2008 14:32:01
          System: S10E9B6C

Position to . . . . . Starting value

Type options, press Enter.
  2=Change  3=Copy  4=Delete  5=Display  6=Print  8=Group members

Opt Group Code  Group Name                Group  Dialer
  |  Code       Name                Address Code
  |-----|-----|-----|-----|
  | 1  clerical  clerical                600001  A
  |-----|-----|-----|-----|
  | - inbound ts inbound test                700999  A
  | - ivr ob 825 ivr ob test kick out 825    700002  A
  | - BIB       blended ib hunt group        600888  A
  | - CBoverflow cb overflow frm 700999      1001    A
  | - Group test Test group 700001          700001  A
  | - 1000      IB IVR for Berlin Testing    1000    2
  | - 500999    Standard Blended IB            500999  A
  | - 600999    IB IVR test                  600999  A
  | - 603000    IB IVR for Medical            603000  A
  | - 609001    IB Berlin                    609001  2
  |-----|-----|-----|-----|
                                          More...

F3=Exit  F5=Refresh  F6=Create  F12=Cancel
F14=Previous view  F15=Next view  F17=Top  F18=Bottom  F21=Print list
Copyright (c) 2005 by Quantrax Corporation.

```

25. Now add the IB IVR agent as a member to the HG 600999. Put an 8 in front of the new hunt group 600999 and hit enter.

26. F6 to create the member...

```

          Create Hunt Group Members                 8/20/2008 14:34:45
          System: S10E9B6C

Type choices, press Enter.

Group code . . . . . 600999
Sequence . . . . . 10

User . . . . . IVRIB01
--OR-- Extension . . . . . _____
--OR-- Group . . . . . _____

F3=Exit  F5=Refresh  F12=Cancel

```

27. Add the member as shown above...and enter

28. A message will appear at the bottom of the screen indicating that the member has been added...now just F3 out...

FYI - Periodically you will see these types of messages as you enter HG's, NNE's and members...

'Group membership record for 600999/10 was successfully created.'

29. Create the 5 smart codes needed for the script. At a minimum, they need to leave a note.

30. Now insert the Smart Codes in to the IB script in
C:\softdial\SCR2\scripts\StandardInboundIVR_ClientScript

***the entries look like the following---just search for the specific condition and fill in the smart code. **Please contact us if you need assistance. AND, always make a copy before making changes to the config.**

<!-- For full payment apply smart code 076 -->

*<step id="AssignSmartCode076" name="AssignSmartCode076"
component="SimpleAssign">*

<params>

<param name="Value" value="076" />

</params>

31. Now we need to create our set-up on the PC side...

32. Create the same IVR agent on the dialer PC. For IB, the NNE is added and the system creates 900XXX for the NNE. So, go to the Name Space Editor and highlight Hunt Groups. Select 'Add Data Item' and enter the IVR agent as 909501.

Name Space Editor

Tree view structure:

- Name Spaces
 - _config
 - Huntgroup
 - Incoming Call Route
 - Landlord Users
 - Sound Resources
 - Static Configuration
 - Tenants
 - Turret Configurations
 - _tenantConfig
 - default
 - Agent Names
 - Agent Outcomes
 - Campaign Names
 - Campaigns
 - INBOUND
 - Queues
 - system
 - Queues
 - Sound Resources
 - Static Configuration
 - Turret Configurations

Type	ID	Name	Details
Q Queue Configura...	1	1001	Overflow time 60. Overflow A
Q Queue Configura...	2	999001	Overflow time 60. Overflow A
Q Queue Configura...	200	200	Overflow time 30. Overflow A
Q Queue Configura...	1001	1001	Overflow time 60. Overflow A
Q Queue Configura...	600005	600005	Overflow time 60. Overflow A
Q Queue Configura...	600999	600999	Overflow time 60. Overflow A
Q Queue Configura...	603000	603000	Overflow time 60. Overflow A
Q Queue Configura...	700001	700001	Overflow time 60. Overflow A
Q Queue Configura...	700002	700002	Overflow time 60. Overflow A
Q Queue Configura...	700005	700005	Overflow time 60. Overflow A
Q Queue Configura...	809008	809008	Overflow time 60. Overflow A
Q Queue Configura...	809009	809009	Overflow time 60. Overflow A
Q Queue Configura...	901221	901221	Overflow time 60. Overflow A

Buttons: Add Path, Delete Node, Add Data Item, Delete Item, Edit, Close

Queue Configuration

Identity

ID: 909501

Queue Address: 909501

Description: IB IVR agent IVRIB01 9501

Behaviour

Overflow address: []

Overflow on group busy immediately:

Round-Robin group:

Queue priority relative to other queues in campaign: 0

Timers

NOTE: All timer values are in seconds

Agent RNA time (sec): 15

Overflow time: 60

Queue time warning threshold: 20

Queue time error threshold: 40

Timed reminder interval: 0

In-Queue Messaging

Queue entry (mandatory): []

Queue busy on entry greeting: []

Queue Hold Music Loop: []

Queue timed reminder greeting: []

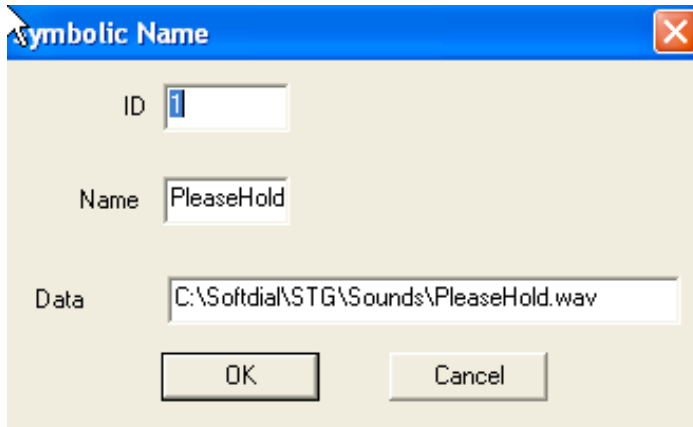
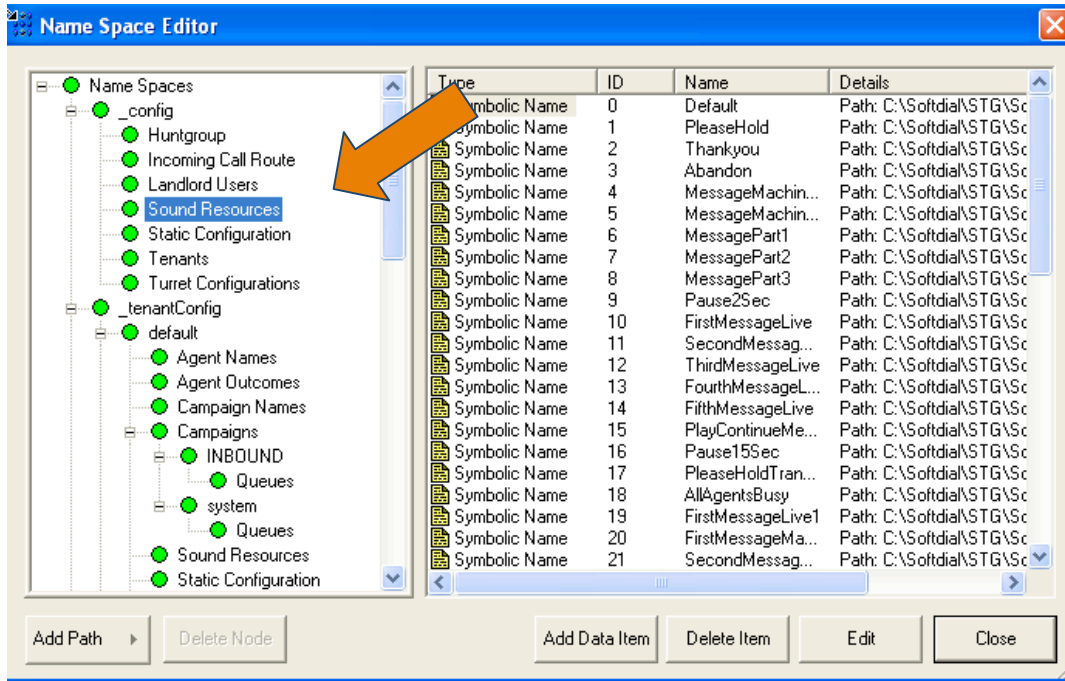
Application Routing

Allow application to determine route:

App Route timeout (sec): 5

Buttons: OK, Cancel

- 33. Overflow should be left blank and Do Not mark ‘overflow on group busy...’**
- 34.** Follow the same set up to create another HG for a non-English Hunt Group. There is an option available to let non-English speaking callers go to a specific hunt group. So, create a new hunt group using 600xxx. In intelc add the members needed for this group. This will be live members that can speak to the callers.
- 35.** Now go to the dialer PC and add this same hunt group.
- 36.** If you need to add a single extension only for the non-English speaking agents, create a 800xxx for the single extension.
- 37.** Quantrax will send you the Standard IB Package. This will include:
- ✓ STG config.xml
 - ✓ SCH config.xml
 - ✓ SCR2 config.xml
 - ✓ SCR2 script XML
 - ✓ STG wav files
- 38.** The STG wav files will need to be set up in the Name Space Editor under Sound Resources. The Name (Symbolic Name) field could be the SAME name as the wav file. The DATA field is the path for the location of the wav file. **This is extremely important since the script XML will be looking for—the Symbolic Name. Then the path and name of the wav file will follow....**



Name = Symbolic name

Data = Path for wav file

39. There are 2 wav files that will need to be recorded. Please submit to Quantrax the text you would like translated to a recording.

- Initial Greeting
- Mailing Address

40. Please modify the SCR2 config for any additions/changes
41. Please modify the Script config for any additions/changes
42. Verify with Quantrax that the TTS engine loaded and is updated in the STG config. (you would see a separate folder in Softdial called TTS)
- 43. Recycle Services after ALL has been entered**