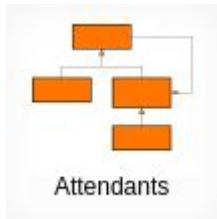



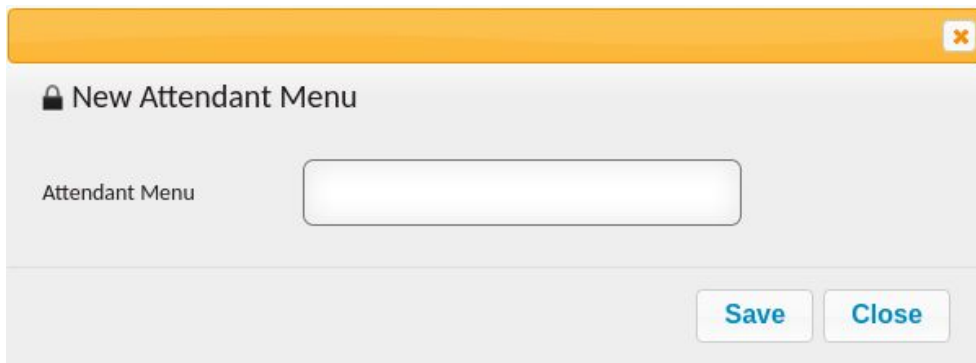
Attendants



The Attendants screen is where Interactive Voice Response (IVR) trees can be constructed and managed.


Creating an IVR

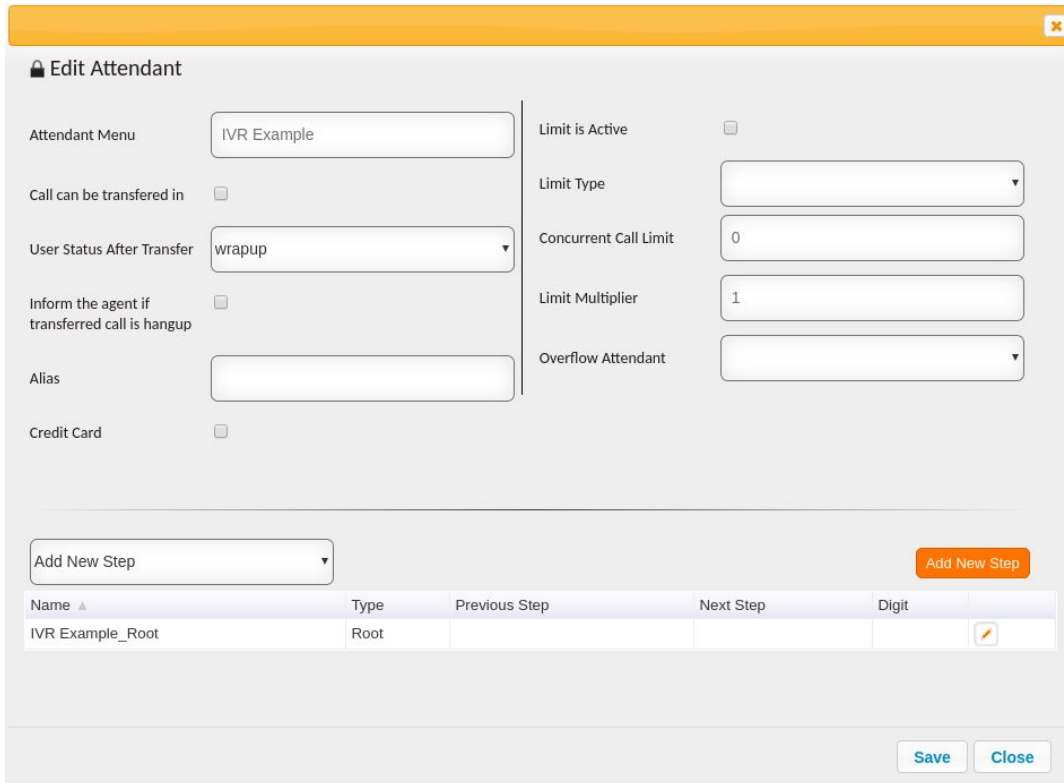
1. Click the new button, , in the top right corner, the following pop-up screen will appear as shown below:



2. Click the Attendant Menu input box, type the desired name of the IVR an example name is shown below:



3. Click the save button, , the following screen will appear:



Edit Attendant

Attendant Menu:

Call can be transferred in: ☐

User Status After Transfer:

Inform the agent if transferred call is hangup: ☐

Alias:

Credit Card: ☐

Limit is Active: ☐


Limit Type:

Concurrent Call Limit:

Limit Multiplier:

Overflow Attendant:

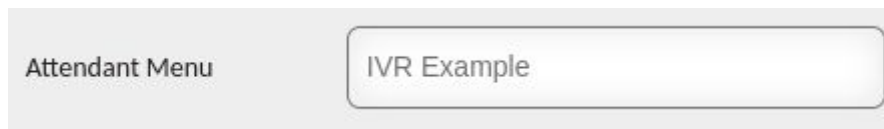
Add New Step:

Name	Type	Previous Step	Next Step	Digit	
IVR Example_Root	Root				

Save Close

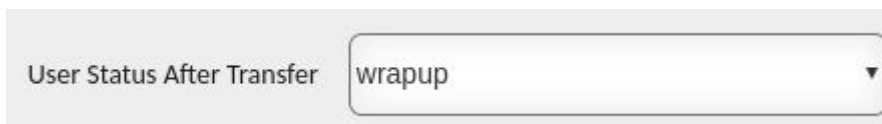
Note: By Default, several things are already set up within the IVR. They are listed below:

The Attendant Menu name is inputted by default, as shown below:



Attendant Menu:

User Status After Transfer is wrapup (allows for a delay, the agent has to reselect the Available status to resume receiving calls) by default, as shown below:




User Status After Transfer:

Limit Multiplier is “1” by default (used as a multiplying factor for the “auto based” calculations. For example, if the auto-based calculation determines there are “6” agents, the limit multiplier is the number that is multiplied by the auto based agent count. So for this example, using a limit multiplier of “1” the total number of inbound calls that can be handle by the IVR before going to the overflow attendant is “6”) as shown below:

Limit Multiplier	1
------------------	---

The root step of the IVR tree is displayed in the following format:

“Name assigned to the Attendant”_Root as shown below:

Name ▲	Type	Previous Step	Next Step	Digit	
IVR Example_Root	Root				

- If desired, select the “Calls can be transferred in” checkbox (this allows the agent to transfer to this IVR if desired). The checkbox is shown below:

Call can be transfered in	<input type="checkbox"/>
---------------------------	--------------------------

- If desired, select the “Inform the agent if a transferred call is hangup” checkbox (If this checkbox is selected, it will notify the agent if the customer hung up the call before completing the IVR. For example, if the agent transferred the customer to a satisfaction survey, and the customer hung up before completing the survey. The checkbox is shown below:

Inform the agent if transferred call is hangup	<input type="checkbox"/>
--	--------------------------

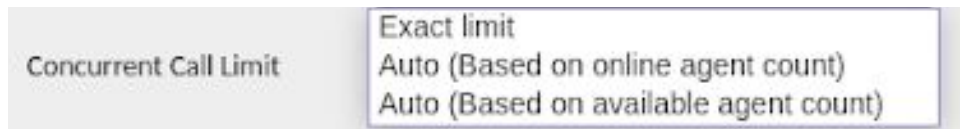
-
6. If desired, an Alias number can be used for the IVR. (Normally used for IP phones so the agent can transfer to an IVR set up for IP phones, but it can also be used in the tenant, by selecting “Internal Transfer” in the Queues section - See more in the queues section)
 7. If desired, the credit card checkbox can be selected (Must be checked when creating an IVR credit card payment step). The checkbox is shown below:

A light gray rectangular button with the text "Credit Card" on the left and an unchecked checkbox on the right.

8. IVR call limits can be set up by selecting the “Limit is Active” checkbox, as shown below:

A light gray rectangular button with the text "Limit is Active" on the left and a checked checkbox on the right.

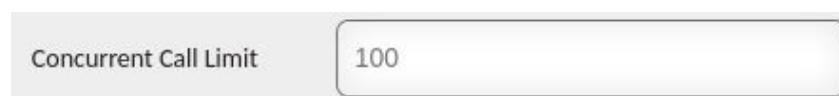
9. Click the “Limit Type” input box. The following dropdown menu will appear:



The dropdown selections are described below:

Exact Limit	If Exact Limit is selected, please follow steps 10 - 11 to input the exact limit.
Auto (Based on online agent count)	Determines the number of concurrent calls to the IVR based on the online agent count (agent can be in any status) Skip steps 10 - 11.
Auto (Based on available agent count)	Determines the number of concurrent calls to the IVR based on the online available agent count. Skip steps 10 - 11.

10. Click the “Concurrent Call Limit” input box type the desired concurrent call limit. An example is shown below:



-
11. Click the “Limit Multiplier” input box, type the desired limit multiplier (Can only be used for “Auto (Based on online agent count)” and “Auto (Based on available agent count)”):


A screenshot of a software interface showing a label 'Limit Multiplier' next to a text input box. The input box contains the number '1'.

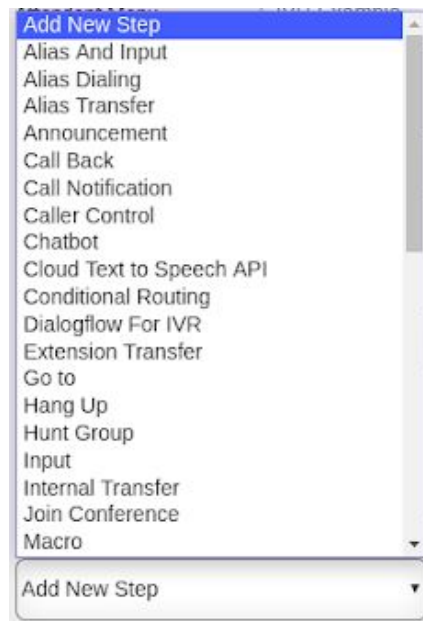
Note: Limit Multiplier is “1” by default (used as a multiplying factor for the “auto based” calculations. For example, if the auto-based calculation determines there are “6” agents, the limit multiplier is the number that is multiplied by the auto based agent count. So for this example, using a limit multiplier of “1” the total number of inbound calls that can be handle by the IVR before going to the overflow attendant is “6”) as shown below:

12. If the Limit is Active checkbox is selected, the “Overflow Attendant” input box must be defined. Click the input box a dropdown list of created IVR’s will be displayed (If no IVR’s are displayed, deselect the “Limit is Active” checkbox, finish following these steps, and create a secondary IVR to be used as the overflow attendant, then edit this IVR and select the “Limit is Active” checkbox and the appropriate IVR.

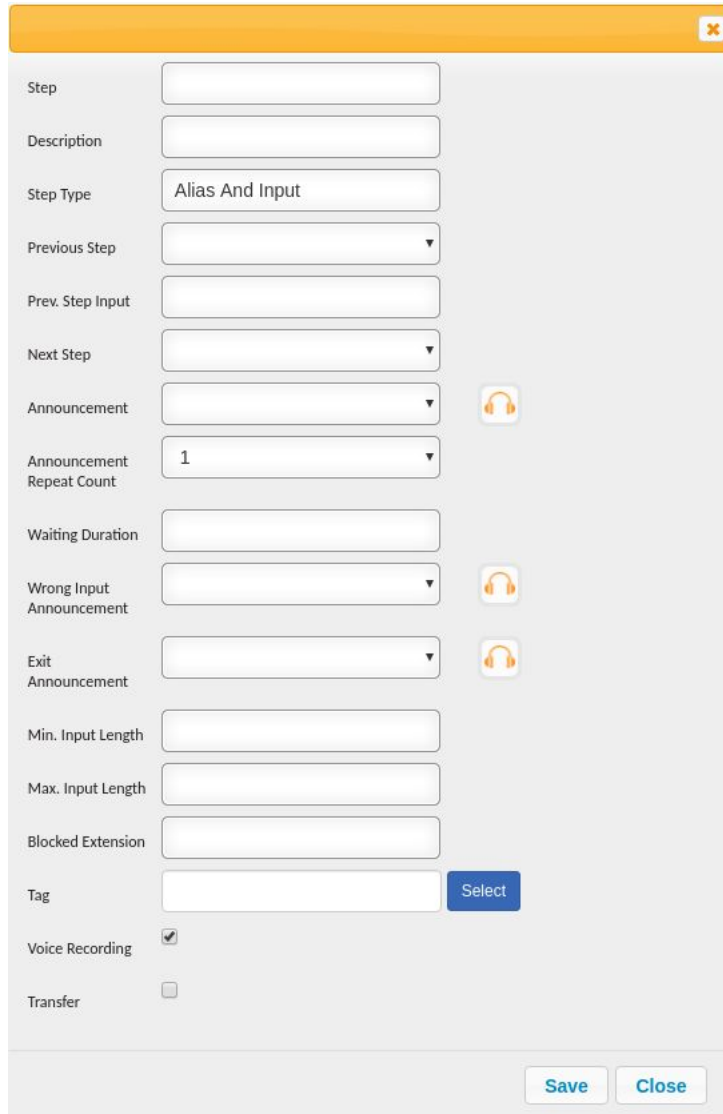
Adding Alias And Input Step

For example, when Alias and Input are added to IVR, The caller will hear an announcement saying, "dial if you know the extension number." If the caller wants to talk to Agent 1 specifically, the caller dials 1001, and the call is forwarded to Agent 1.

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Alias And Input” step the following pop-up window will appear:



Step

Description

Step Type: Alias And Input

Previous Step

Prev. Step Input

Next Step

Announcement

Announcement Repeat Count: 1

Waiting Duration

Wrong Input Announcement

Exit Announcement

Min. Input Length

Max. Input Length

Blocked Extension

Tag


Select

Voice Recording ☒

Transfer ☐

Save Close

3. Click the “Step” input box, type the desired step name. An example is shown below:

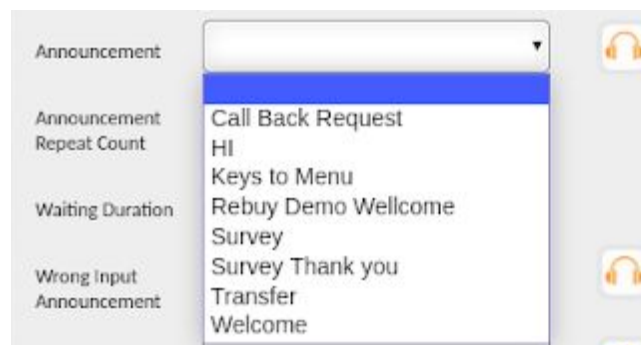



Step

2. AliasInput_Step

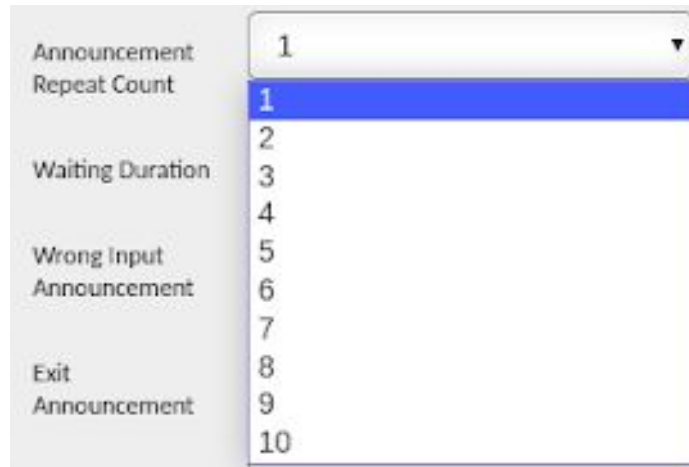
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



The screenshot shows a form with several input fields. The 'Announcement Repeat Count' field is selected, displaying a dropdown menu with numbers 1 through 10. The number 1 is currently selected and highlighted in blue. Other fields visible include 'Waiting Duration', 'Wrong Input Announcement', and 'Exit Announcement'.

10. Select the desired repeat count.
11. In the “Waiting Duration” input box type the waiting duration for the customer input (Seconds) an example is shown below:

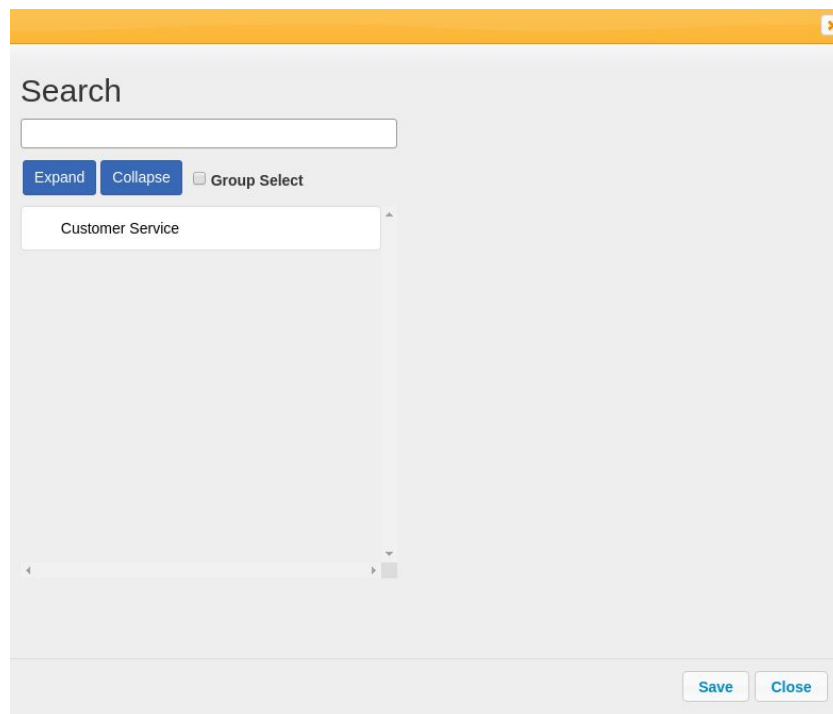


The screenshot shows the 'Waiting Duration' input box with the number 10 entered.

12. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
13. Click the “Exit Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
14. Click the “Min. Input Length” input box type the minimum input length, always “1.”
15. Click the “Max. Input Length” input box type the maximum input length for the customer to select. For example, if the Alias’s range between 3 digits and 4 digits, the max. The input length will be 4.

16. Select the “Blocked Extension” input box type the desired blocked extension. It can be inputted to prevent the customer from being transferred to this value (commas can be used to add multiple extensions).

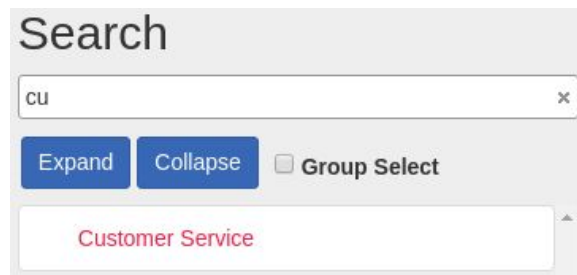
17. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



18. Search for a Tag using the “Search” input box shown below:

A screenshot of a search interface. It features a light gray header with the word "Search" in bold. Below the header is a white input box with a vertical cursor on the left.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A screenshot of the search interface showing results. The input box contains "cu" and has a close button (x). Below the input box are two blue buttons: "Expand" and "Collapse", followed by a checkbox labeled "Group Select". A white list box below shows a single item, "Customer Service", in red text.

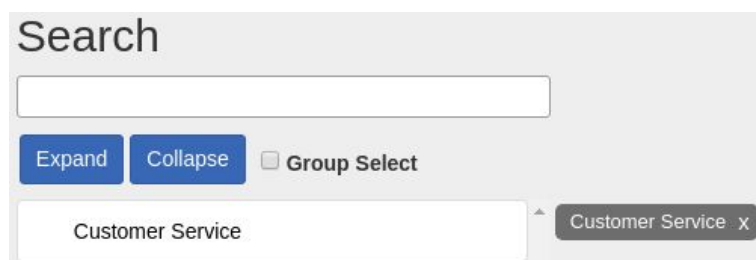
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

A screenshot of the search interface showing results. The input box is empty. Below the input box are two blue buttons: "Expand" and "Collapse", followed by a checkbox labeled "Group Select". A white list box below shows a single item, "Customer Service". To the right of the list box, a gray tag with the text "Customer Service" and a close button (x) is visible.


Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

19. Below the tag's input box, the following two checkboxes are displayed:

A screenshot of two checkboxes. The first checkbox is labeled "Voice Recording" and the second is labeled "Transfer". Both checkboxes are currently unchecked.


The descriptions of these checkboxes are explained below:

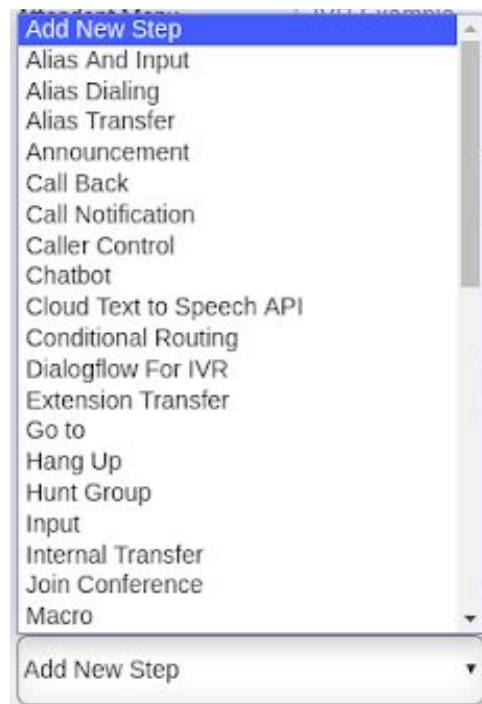
Voice Recording	If checked, records the IVR
Transfer	Used by the Call Center Studio Development Team (Do not check)

20. Click the save button, .

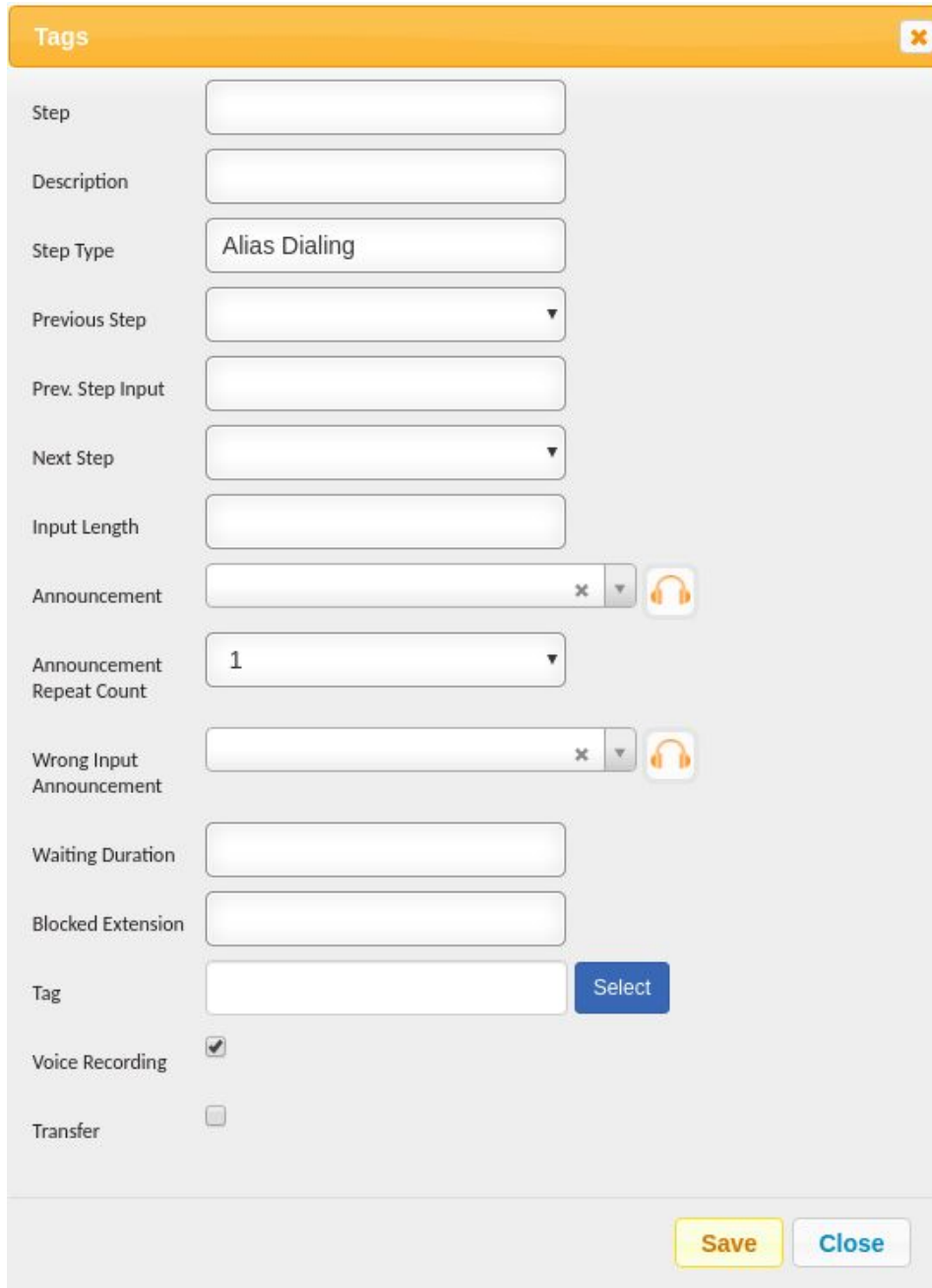
Adding Alias Dialing Step

The step is used to transfer the call to the dialed extension number.

1. Click the “Add New Step” dropdown box, , the following list will appear:



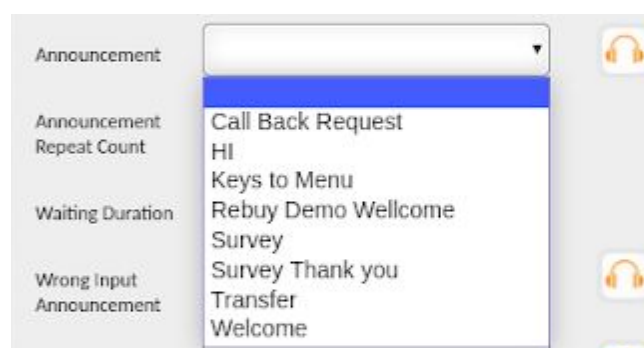
- Select the “Alias Dialing” step the following pop-up window will appear:




- Click the “Step” input box, type the desired step name. An example is shown below:

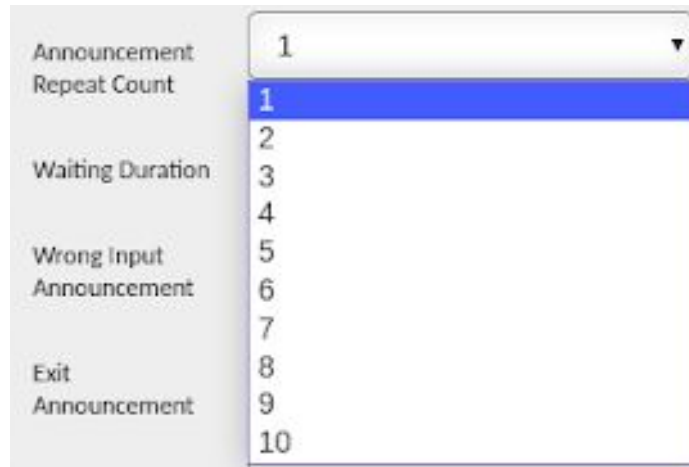


4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Input Length” input box, type the desired input length.
9. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

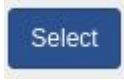
10. Click the “Announcement Repeat Count” input box, the following dropdown list will appear:

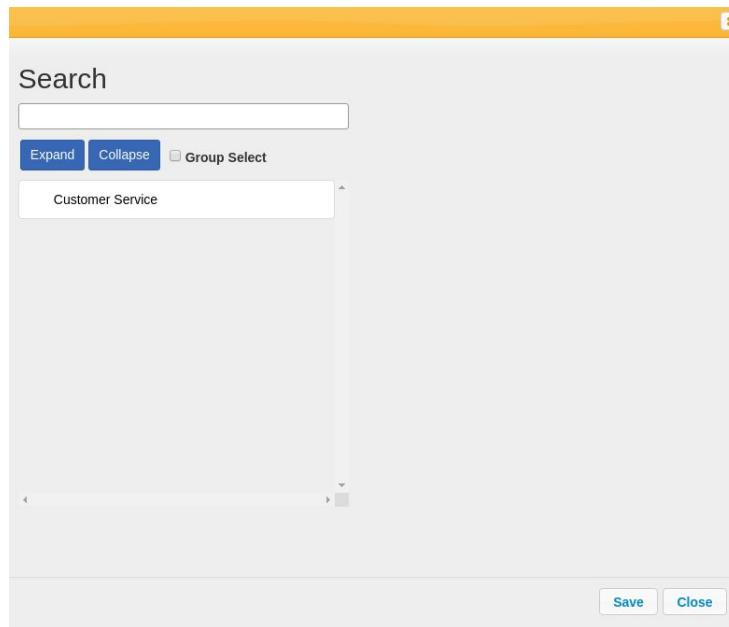
A screenshot of a web form. On the left, there is a vertical list of labels: 'Announcement Repeat Count', 'Waiting Duration', 'Wrong Input Announcement', and 'Exit Announcement'. To the right of 'Announcement Repeat Count' is a dropdown menu. The dropdown is open, showing a list of numbers from 1 to 10. The number '1' is highlighted with a blue background. The number '1' is also visible in the dropdown's header area.

11. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
12. In the “Waiting Duration” input type the waiting duration for customer input (Seconds) an example is shown below:

A screenshot of a web form. On the left, there is a label 'Waiting Duration'. To its right is a text input field containing the number '10'.

13. Select the “Blocked Extension” input box type the desired blocked extension. It can be inputted to prevent the customer from being transferred to this value (commas can be used to add multiple extensions).

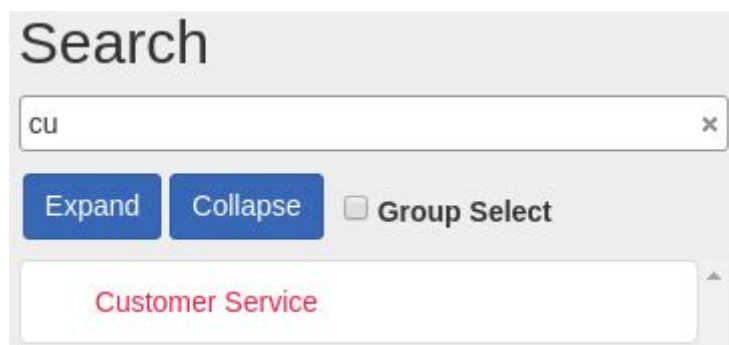
14. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



15. Search for a Tag using the “Search” input box shown below:



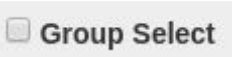
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



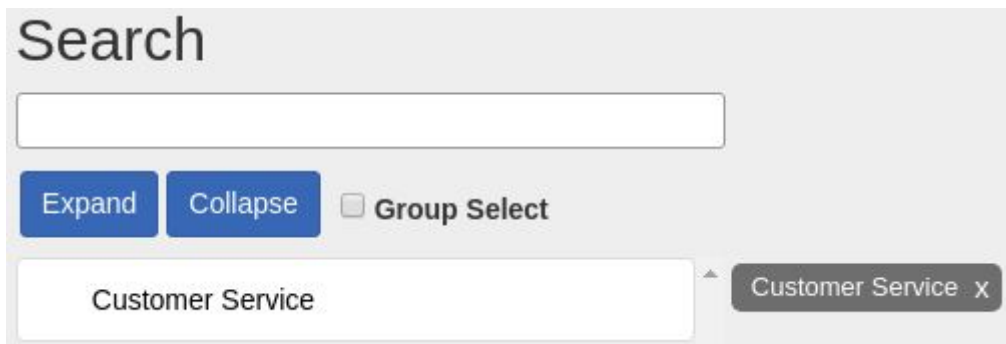
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The screenshot shows a 'Search' interface. At the top is a search input field. Below it are three buttons: 'Expand' (blue), 'Collapse' (blue), and 'Group Select' (checkbox). Below these buttons is a list box containing the tag 'Customer Service'. To the right of the list box, the tag 'Customer Service' is displayed with a small 'x' icon next to it, indicating it has been selected.


Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

16. Below the tag's input box, the following two checkboxes are displayed:

A screenshot of a user interface showing two checkboxes. The first checkbox is labeled "Voice Recording" and the second is labeled "Transfer". Both checkboxes are currently unchecked.


The descriptions of these checkboxes are explained below:

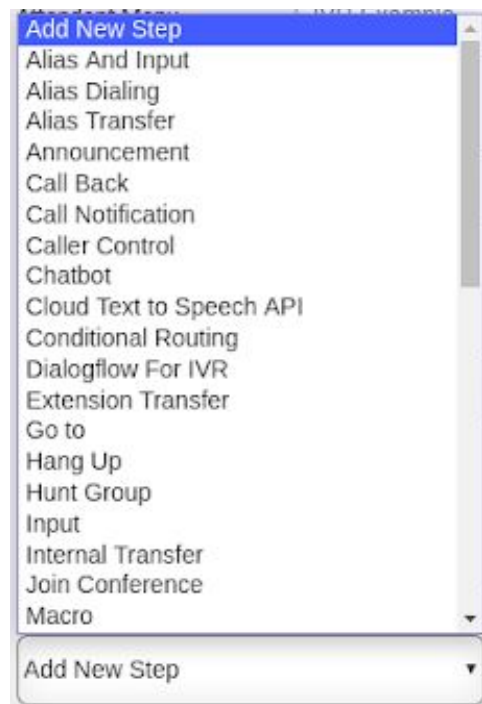
Voice Recording	If checked, records the IVR
Transfer	Used by the Call Center Studio Development Team (Do not check)

17. Click the save button, .

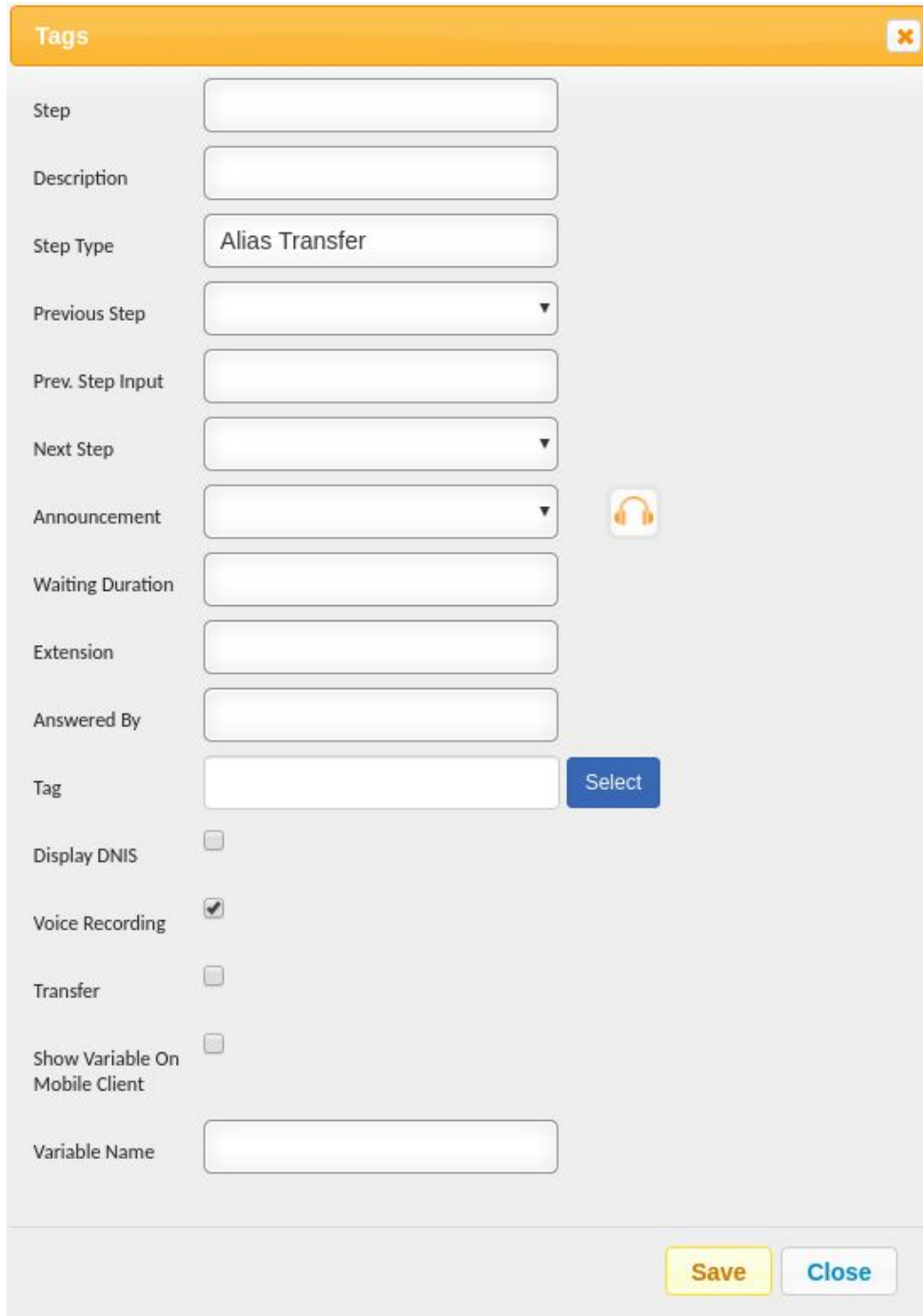
Adding Alias Transfer Step

The step used to transfer the call to the designated IP phone.

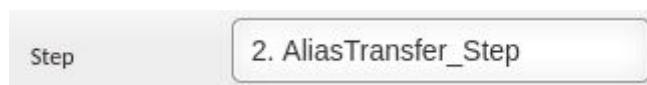
1. Click the “Add New Step” dropdown box,  , the following list will appear:



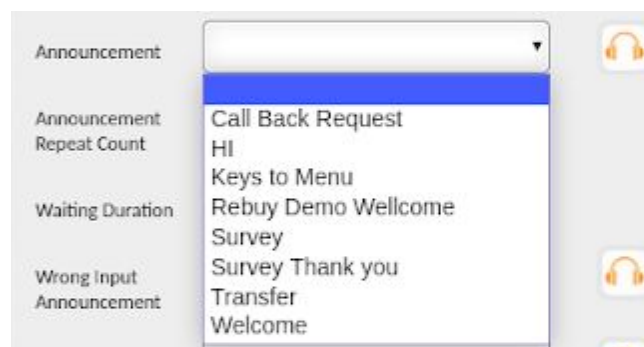
- Select the “Alias Transfer” step the following pop-up window will appear:




- Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:




Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

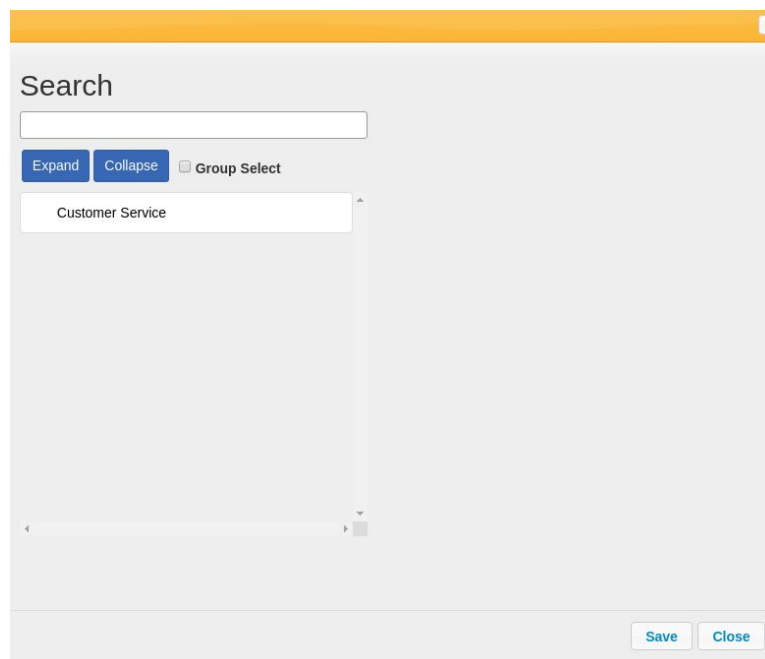
9. In the “Waiting Duration” input type the waiting duration for the customer input (Seconds) an example is shown below:

A screenshot of a form field labeled "Waiting Duration" with a text input box containing the number "10".

10. In the “Extension” input box type, the desired user’s extension.

11. In the “Answered By,” input box type the desired user’s name.

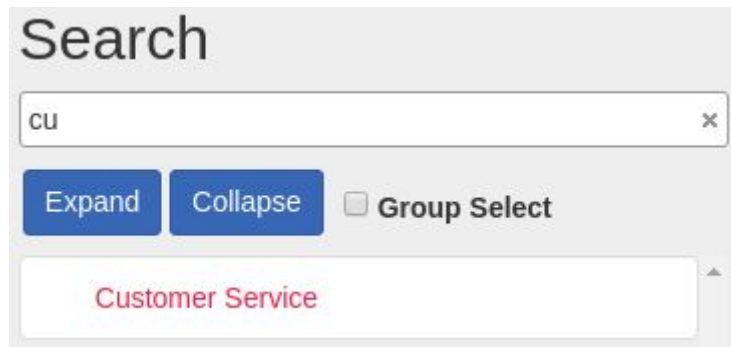
12. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

A screenshot of a "Search" pop-up window. It features a search input field at the top. Below it are two buttons: "Expand" and "Collapse", followed by a checkbox labeled "Group Select". A list box below these controls shows "Customer Service" as a selected item. At the bottom right of the window are "Save" and "Close" buttons.

13. Search for a Tag using the “Search” input box shown below:

A screenshot of a "Search" input box. It consists of a label "Search" above a text input field.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

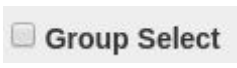


The image shows a search interface with a title "Search". Below the title is a search input field containing the text "cu". To the right of the input field is a small "x" icon. Below the input field are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these buttons is a list box containing the text "Customer Service" in red font.

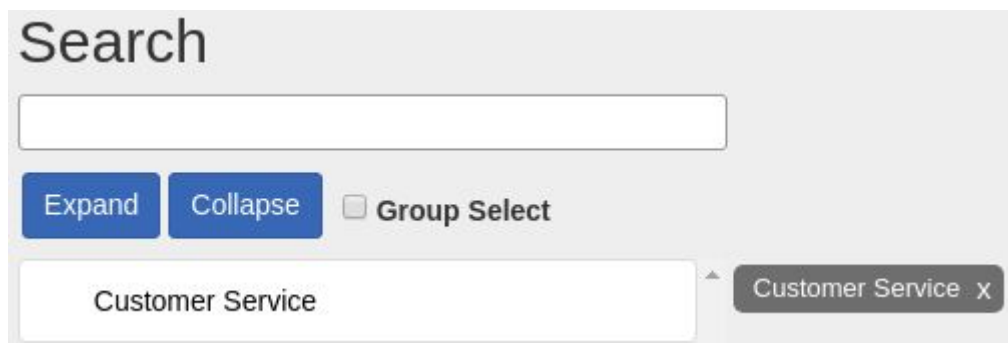
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

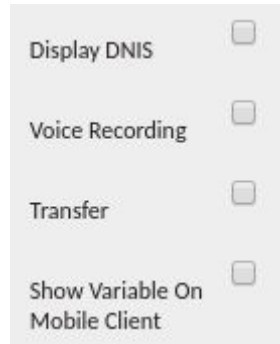
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The image shows the same search interface as before, but with the "Customer Service" tag selected. The "Customer Service" text is now in black font in the list box. To the right of the list box, there is a dark grey button with the text "Customer Service" and a small "x" icon.

Note: To delete a Tag from the selection simply click the "X," , to the right of the tag name

14. Below the tag's input box, the following four checkboxes are displayed:



Display DNIS ☐

Voice Recording ☐


Transfer ☐

Show Variable On Mobile Client ☐

The descriptions of these checkboxes are explained below:


Display DNIS	When clicked shows the agent's number, not customers. It is used to mask the customer's number.
Voice Recording	If checked, it allows the customer's voice to be recorded.
Transfer	Used by the Call Center Studio Development Team (Do not check)
Show Variable on Mobile Client	If employees are using the Call Center Studio mobile client, this checkbox can be displayed, so the employee knows that the call is coming from the IVR.

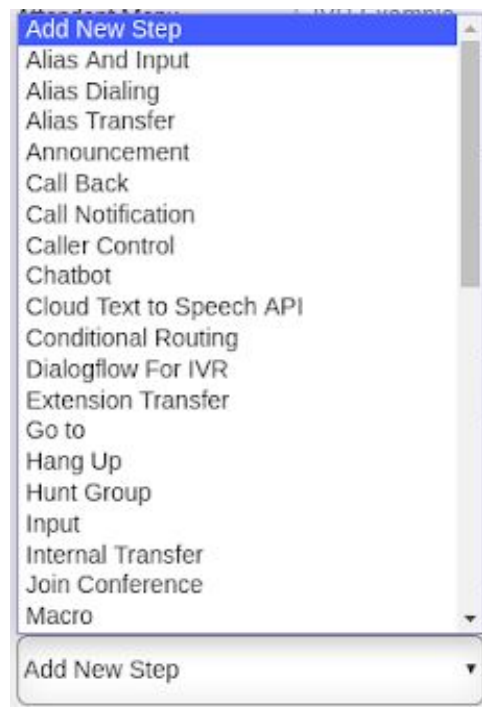
15. If the Show Variable on Mobile Client checkbox is selected, click the “Variable Name” input box and type the desired variable name. If employees are using the Call Center Studio mobile client, this checkbox can be displayed, so the employee knows that the call is coming from the IVR.

16. Click the save button,  .

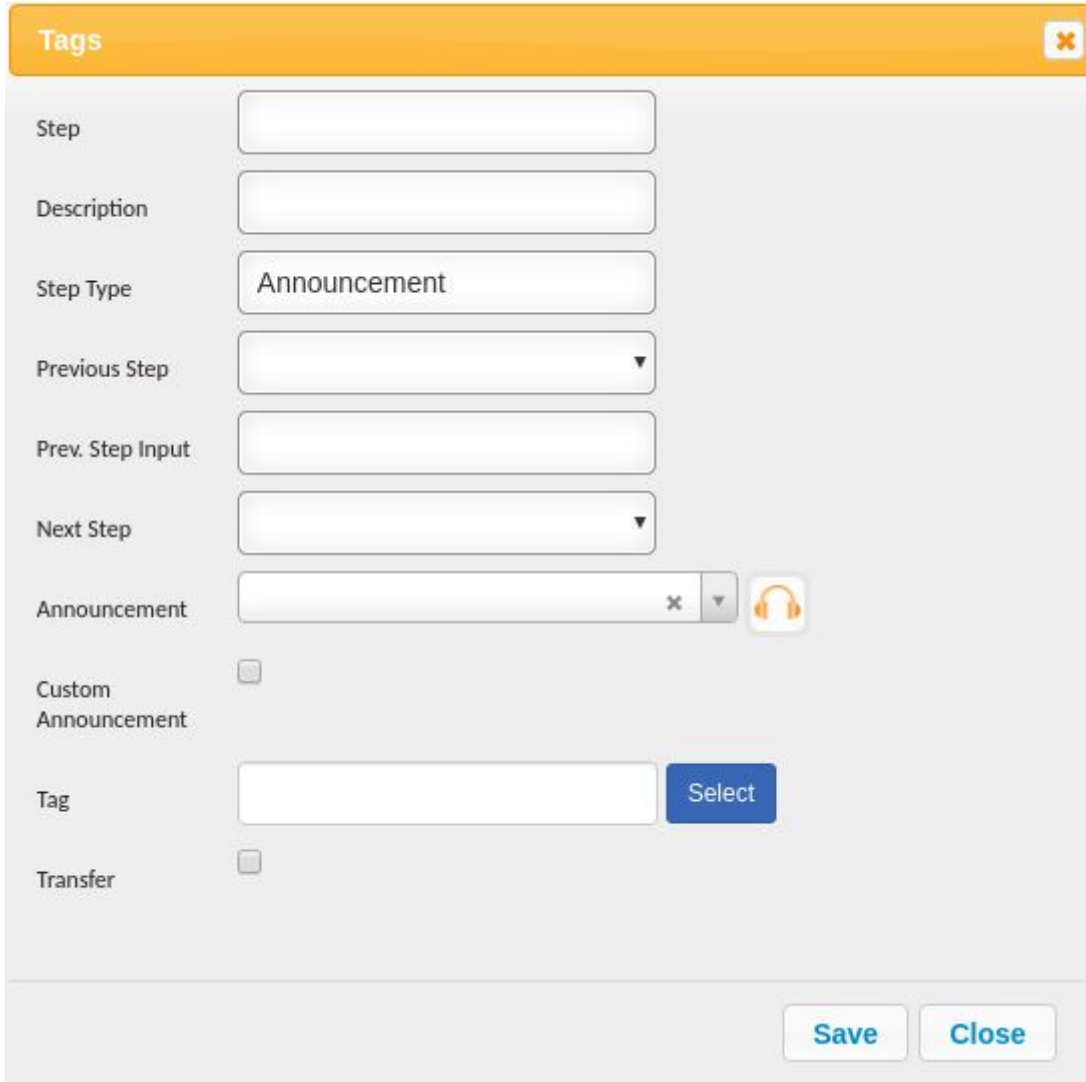
Adding Announcement Step

The specified entrance announcement (Welcome to XX Company) can be added using this IVR step.

1. Click the “Add New Step” dropdown box,  , the following list will appear:



2. Select the “Announcement” step the following pop-up window will appear:

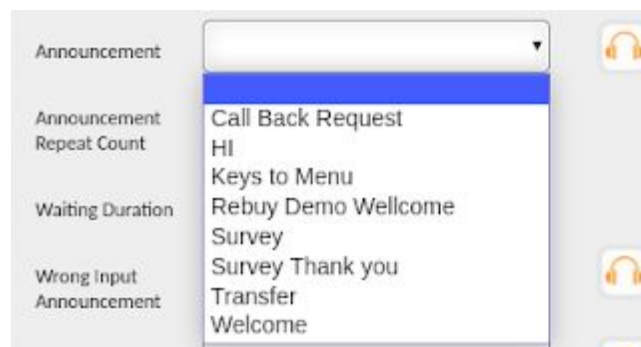



3. Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button,  , located to the right of each Announcement dropdown list.


9. If desired, a Custom Announcement name can be created by checking the “Custom Announcement” checkbox (Used in combination with the Text-To-Speech step, contact the Call Center Studio Development team if a Text-to-Speech IVR is desired.)

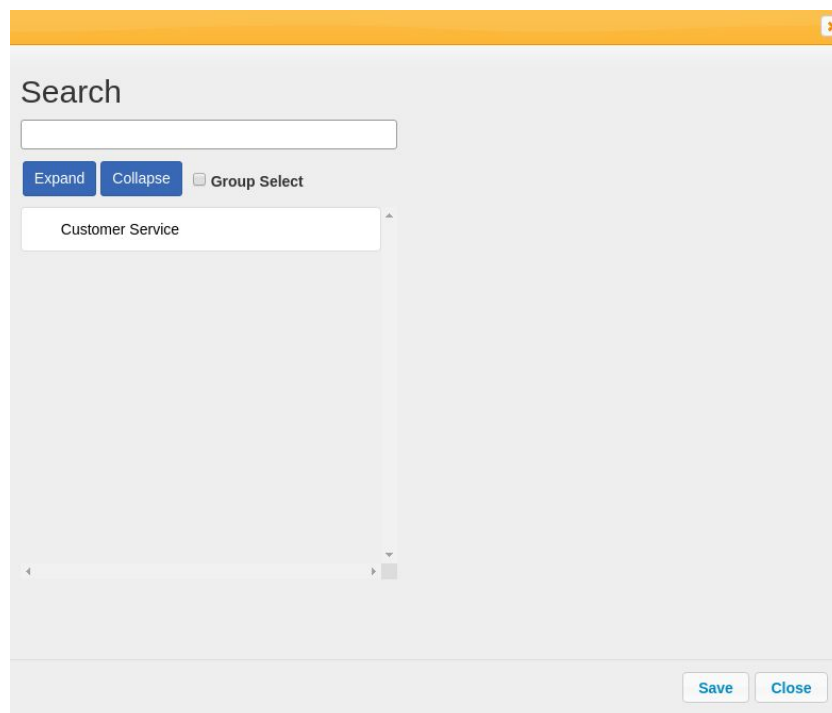
The following input box will appear:



A screenshot of a user interface element. It features a light gray rectangular box. On the left side of the box, the text "Custom Announcement" is displayed. To the right of this text is a small square checkbox containing a checkmark. Below the text and checkbox is a white rectangular input field with a thin gray border and a vertical cursor line inside.

10. In the input box, type the custom announcement name.

11. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

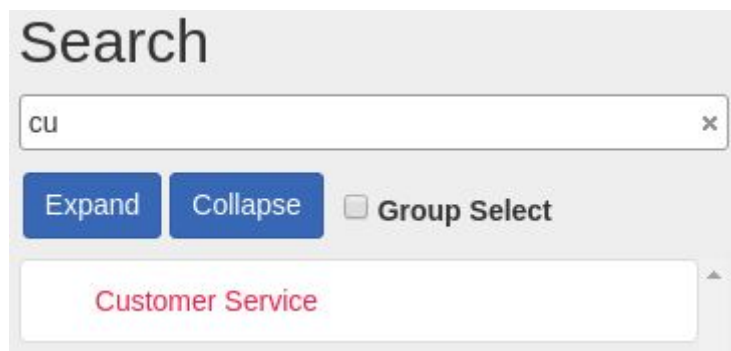


A screenshot of a pop-up window titled "Search". The window has a light gray background and a thin orange border at the top. At the top left, the word "Search" is displayed. Below it is a white rectangular input field. Under the input field are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these controls is a white rectangular list box containing the text "Customer Service". At the bottom right of the window are two small buttons labeled "Save" and "Close".

12. Search for a Tag using the “Search” input box shown below:

A screenshot of a search interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box with a thin gray border. A vertical cursor is visible at the beginning of the input box.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A screenshot of a search results interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box containing the text "cu" and a small "x" icon on the right. Below the input box are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these buttons is a white rectangular box containing the text "Customer Service" in red font.

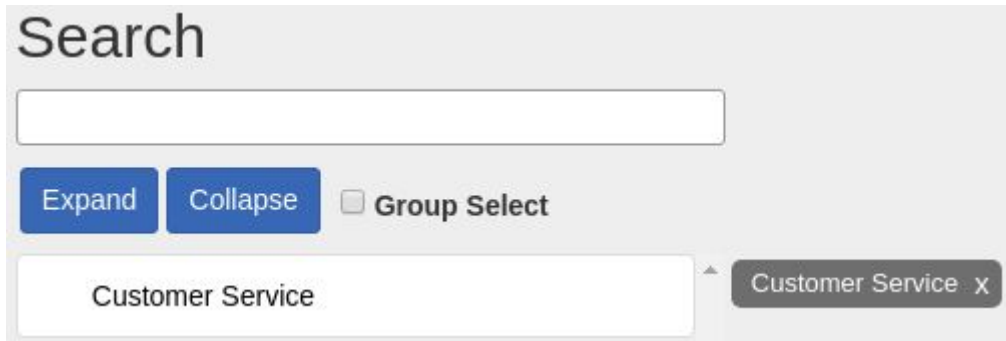
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

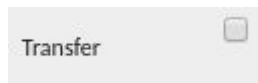
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The screenshot shows a 'Search' section with a text input field. Below the input field are two buttons: 'Expand' and 'Collapse', followed by a checkbox labeled 'Group Select'. Below these is a list box containing the text 'Customer Service'. To the right of the list box, the selected tag 'Customer Service' is displayed with a small 'x' icon to its right for deletion.

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.


13. Below the tag’s input box, the following checkbox is displayed:



A checkbox labeled 'Transfer' with an unchecked box to its right.


The description of the checkbox is explained below:

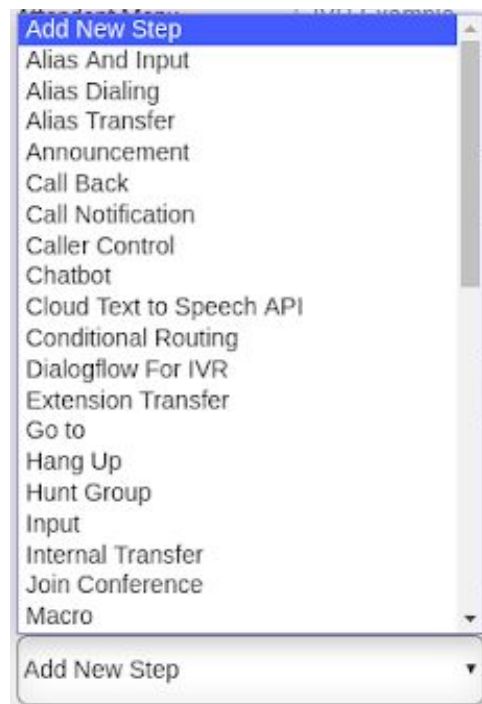
Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

14. Click the save button, .

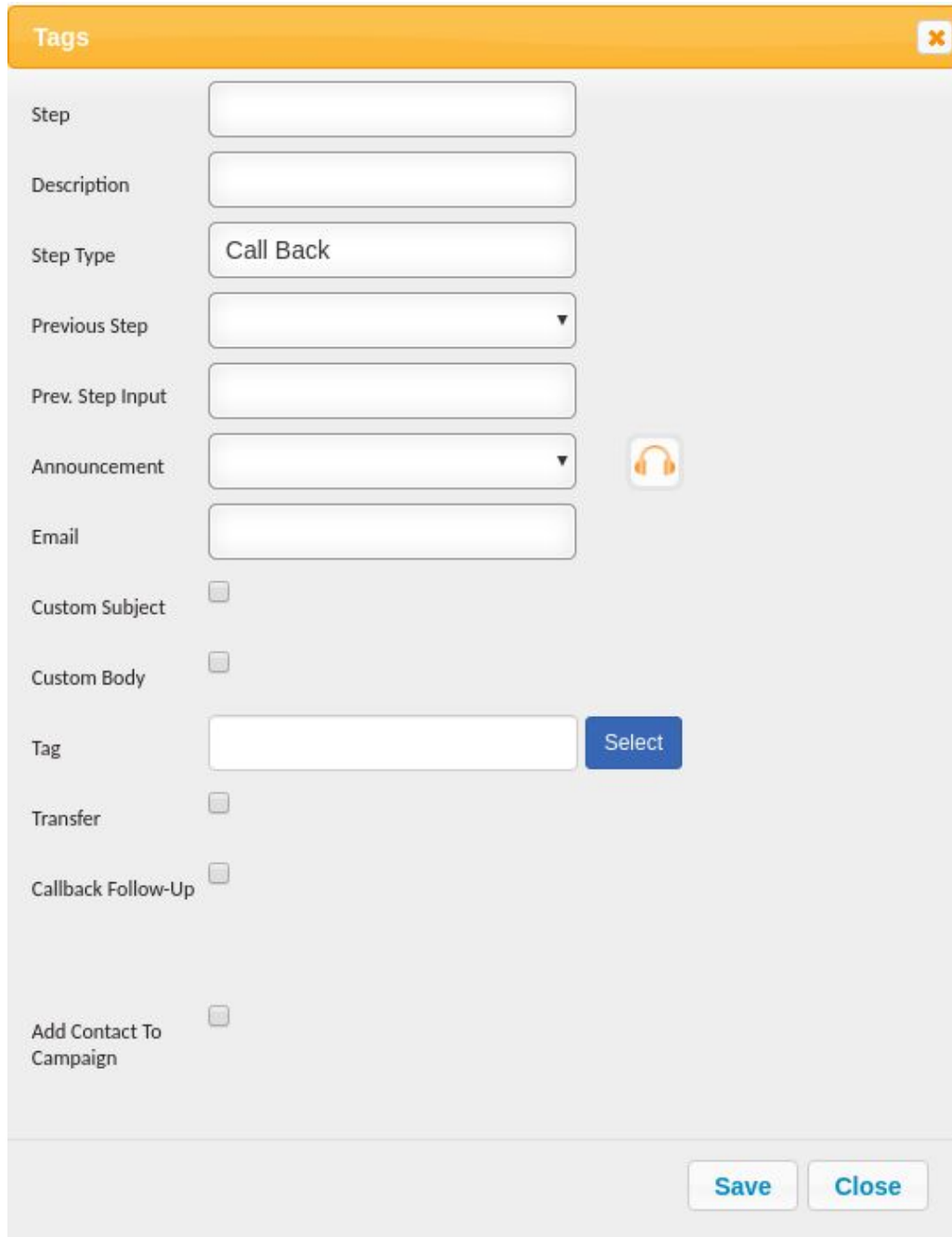
Adding Call Back Step

The step used to make a notification of missed calls by email.

1. Click the “Add New Step” dropdown box,  , the following list will appear:



2. Select the “Call Back” step the following pop-up window will appear:

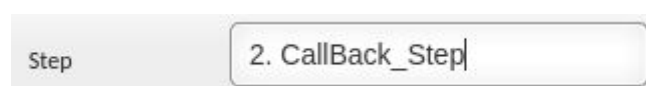


The image shows a pop-up window titled "Tags" with a close button (X) in the top right corner. The window contains a list of fields for configuring a step:

- Step: Text input field
- Description: Text input field
- Step Type: Text input field with "Call Back" entered
- Previous Step: Dropdown menu
- Prev. Step Input: Text input field
- Announcement: Dropdown menu with a speaker icon to its right
- Email: Text input field
- Custom Subject: Checkbox
- Custom Body: Checkbox
- Tag: Text input field with a "Select" button to its right
- Transfer: Checkbox
- Callback Follow-Up: Checkbox
- Add Contact To Campaign: Checkbox

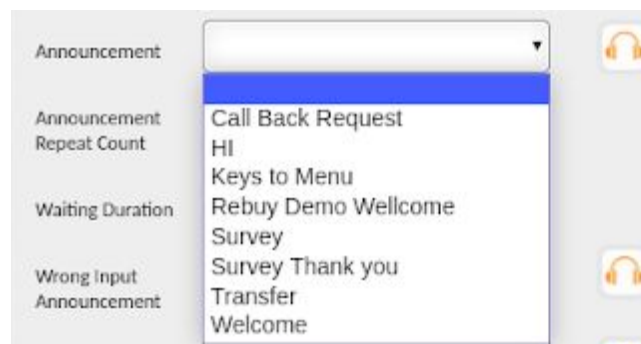
At the bottom right of the window are "Save" and "Close" buttons.


3. Click the “Step” input box, type the desired step name. An example is shown below:



The image shows a close-up of the "Step" input box from the previous window. The text "2. CallBack_Step" is entered into the field.

4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

8. In the “Email” input box, type the desired email that the callback request will be sent to. (Note: multiple emails can be inputted using a comma, “,” to separate them. If the number of emails is over five, a group email is recommended to allow for successful email delivery.)

9. If desired, the “Custom Subject” checkbox can be checked. If checked, a custom email subject line can be created using the input box that appears:




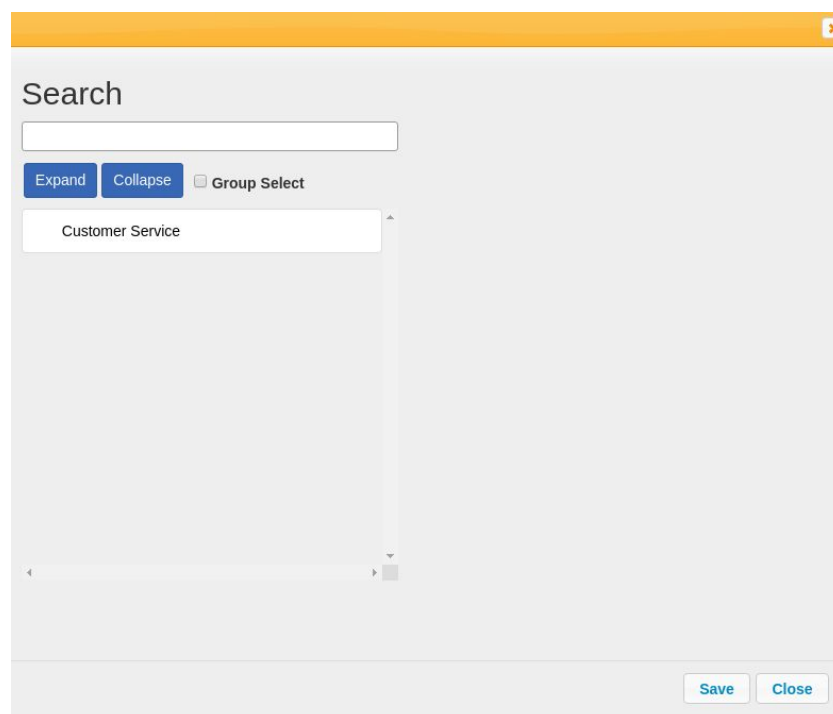
A screenshot of a form section. At the top, there is a checkbox labeled 'Custom Subject' which is checked. Below this, there is a text input box labeled 'Subject'.

10. If desired, the “Custom Body” checkbox can be checked. If checked a custom email body can be created using the input box that appears:



A screenshot of a form section. At the top, there is a checkbox labeled 'Custom Body' which is checked. Below this, there is a text input box labeled 'Body'.

11. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

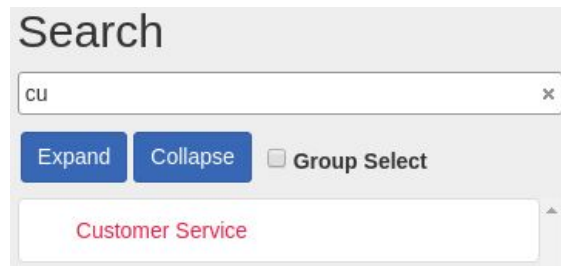


A screenshot of a pop-up window titled 'Search'. It features a search input field at the top. Below the input field are two buttons: 'Expand' and 'Collapse', followed by a checkbox labeled 'Group Select'. A list of search results is displayed below, with 'Customer Service' visible. At the bottom right of the window are 'Save' and 'Close' buttons.

12. Search for a Tag using the “Search” input box shown below:

A search interface with a light gray header containing the word "Search". Below the header is a white input field with a thin gray border and a small vertical cursor on the left.

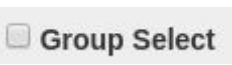
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A search interface showing results. The header "Search" is in the top left. Below it is a search input field containing "CU" with a clear button (X) on the right. Underneath are two blue buttons: "Expand" and "Collapse", followed by a checkbox labeled "Group Select". At the bottom, a white box contains the text "Customer Service" in red font.

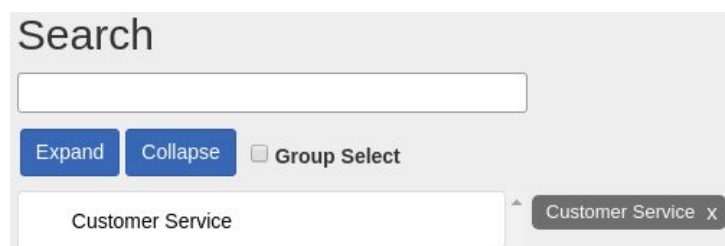
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

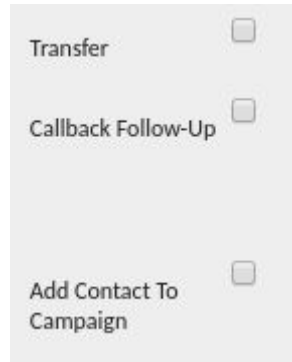
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

A search interface showing results. The header "Search" is in the top left. Below it is an empty search input field. Underneath are two blue buttons: "Expand" and "Collapse", followed by a checkbox labeled "Group Select". At the bottom, a white box contains the text "Customer Service". To the right of this box is a gray button with the text "Customer Service" and a small "X" icon.

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

13. Below the tag's input box, the following three checkboxes are displayed:





Transfer ☐


Callback Follow-Up ☐

Add Contact To Campaign ☐

The descriptions of these checkboxes are explained below:


Transfer	Used by the Call Center Studio Development Team (Do not check)
Callback Follow-up	<p>When checked, the following will be displayed:</p>  <p>Click the “Callback Follow-up Control Time” type the desired time for the customer to be called back. Normally used in combination with the “Add Contact to Campaign” checkbox.</p>

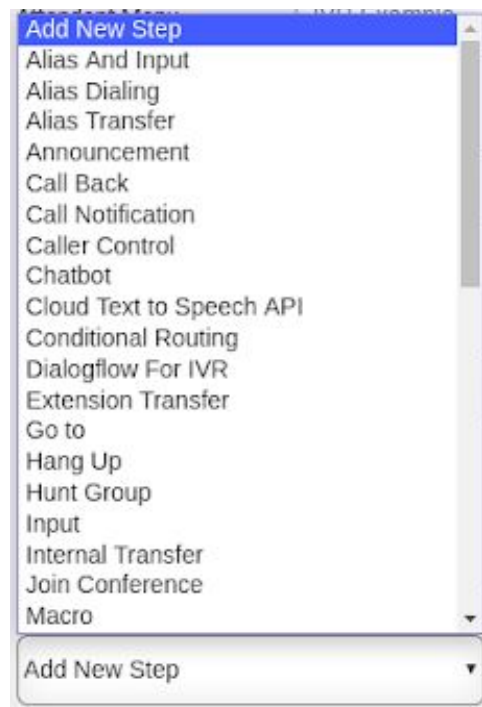
<p>Add Contact to Campaign</p>	<p>When checked, the following will be displayed:</p> <div data-bbox="802 472 1385 792">  </div> <p>Click the “Target Campaign” dropdown menu to select the desired campaign.</p> <p>Click the “Target List Name” type the desired list name.</p> <p>Click the “Add after X minutes” type the desired time after calling to add the caller to the Target Campaign.</p>
--------------------------------	--

14. Click the save button,  .

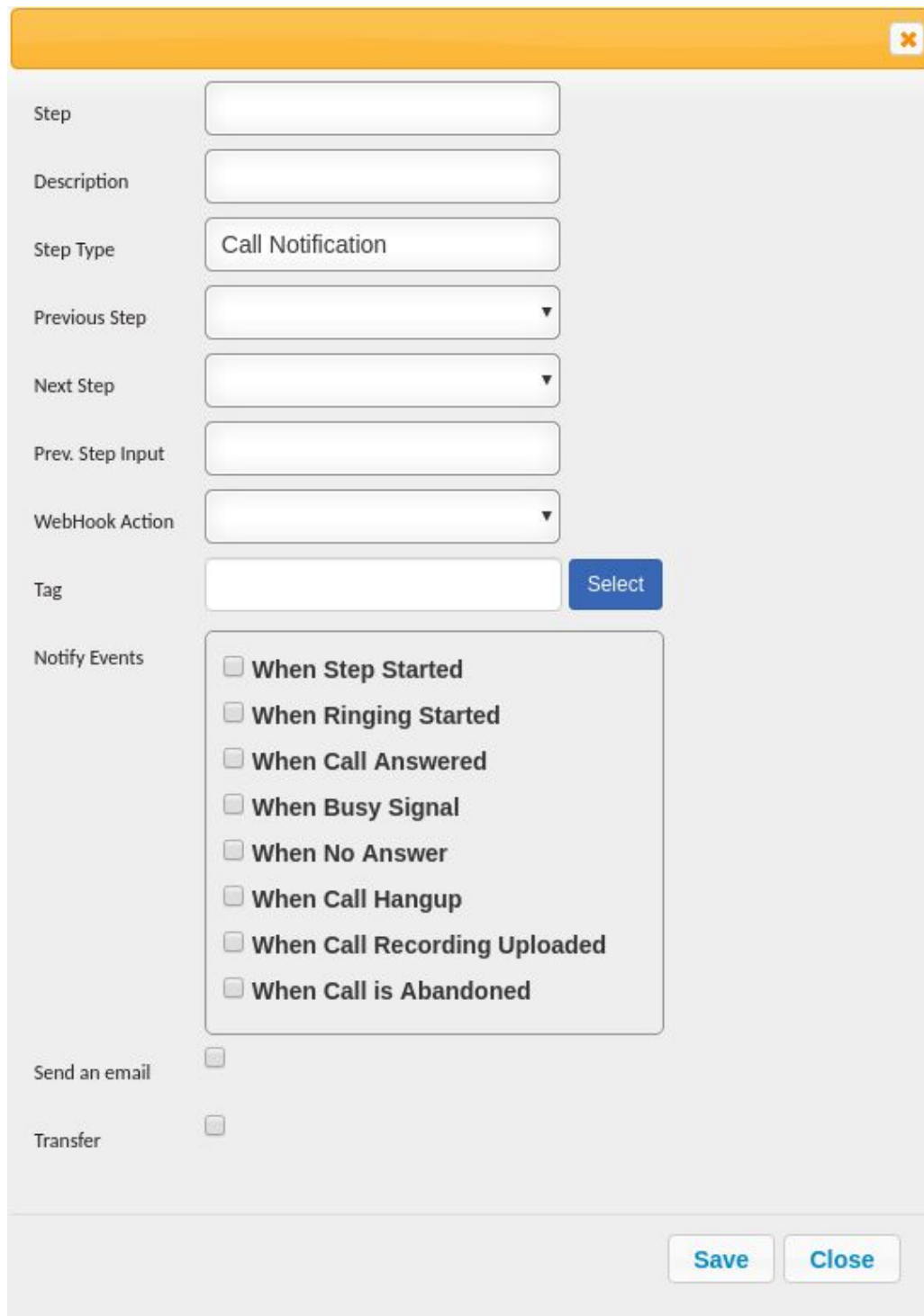
Adding Call Notification Step

The step where the web service, prepared by the customer and defined by Webhook, is triggered based on the call status, according to the notification events selected for users using IP telephony.

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Call Notification” step the following pop-up window will appear:

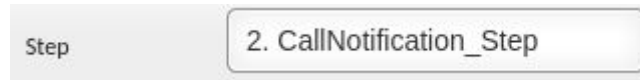


A pop-up window with an orange header bar containing a close button (X). The window contains the following fields and options:

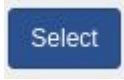
- Step:** Text input field.
- Description:** Text input field.
- Step Type:** Dropdown menu with "Call Notification" selected.
- Previous Step:** Dropdown menu with a downward arrow.
- Next Step:** Dropdown menu with a downward arrow.
- Prev. Step Input:** Text input field.
- WebHook Action:** Dropdown menu with a downward arrow.
- Tag:** Text input field next to a blue "Select" button.
- Notify Events:** A list of eight events, each with an unchecked checkbox:
 - ☐ When Step Started
 - ☐ When Ringing Started
 - ☐ When Call Answered
 - ☐ When Busy Signal
 - ☐ When No Answer
 - ☐ When Call Hangup
 - ☐ When Call Recording Uploaded
 - ☐ When Call is Abandoned
- Send an email:** An unchecked checkbox.
- Transfer:** An unchecked checkbox.

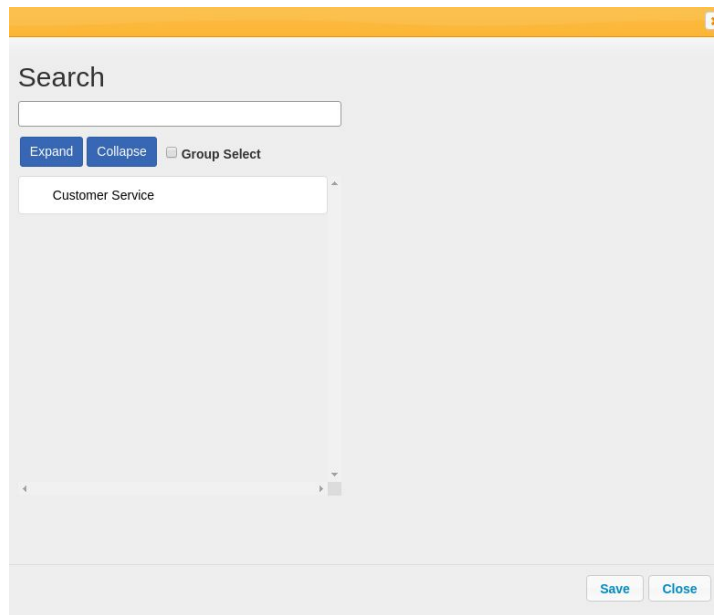
At the bottom right, there are two buttons: "Save" and "Close".

-
- Click the “Step” input box, type the desired step name. An example is shown below:

A screenshot of a user interface showing a light gray rectangular box. On the left side of the box is the label "Step" in a small, dark font. To the right of the label is a rounded rectangular input field containing the text "2. CallNotification_Step" in a dark font.

- If desired in the “Description” input box, type a description for the step.
- In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
- In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
- Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
- Click the “WebHook Action” input box, a dropdown menu will appear with created webhooks, select the desired webhook (See the Web URLs section for more information on creating webhooks).

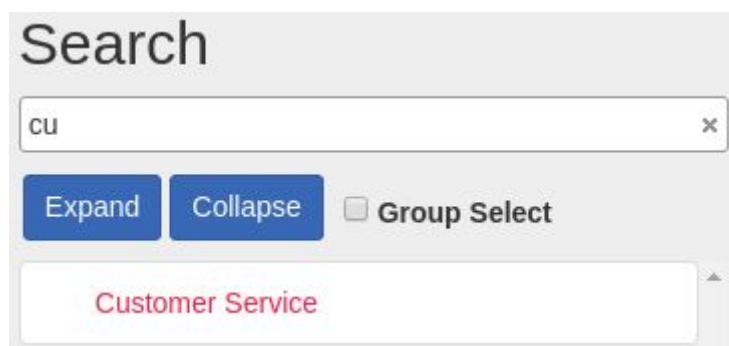
9. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



10. Search for a Tag using the “Search” input box shown below:



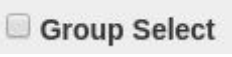
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



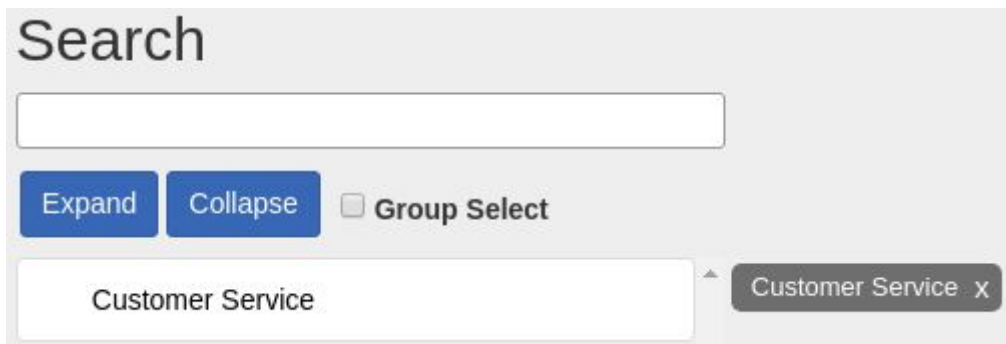
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

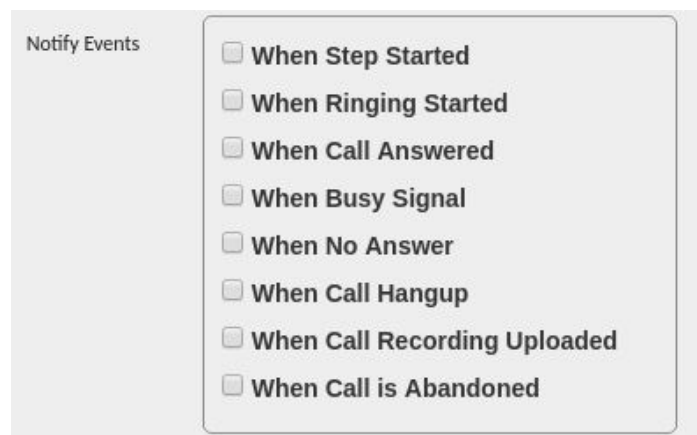
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name

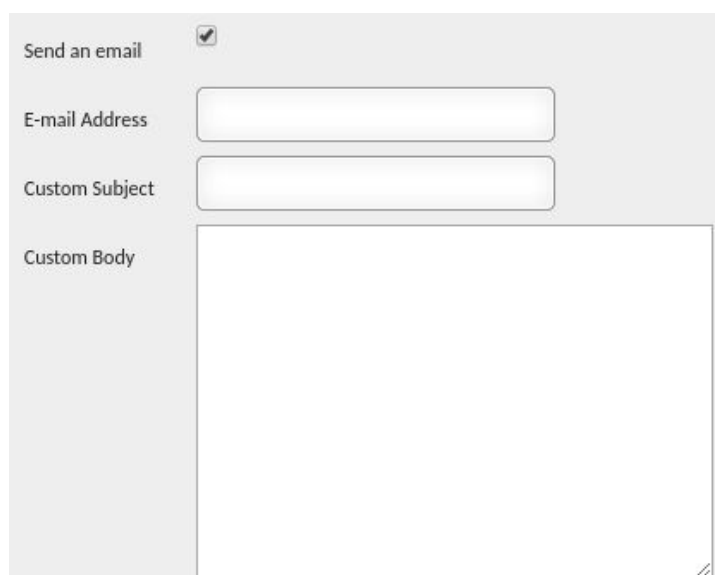
11. Call Notification events can be sent to a user via email notification or web service via the created Webhook in the Web URLs section. The following notification events can be selected, the user then would receive notifications regarding the checked events via email or a web service (For more information or set up questions contact the assigned Call Center Studio Project Manager).



Notify Events

- ☐ When Step Started
- ☐ When Ringing Started
- ☐ When Call Answered
- ☐ When Busy Signal
- ☐ When No Answer
- ☐ When Call Hangup
- ☐ When Call Recording Uploaded
- ☐ When Call is Abandoned

12. If desired notifications can be sent via email instead of a web service by checking the “Send an email” checkbox, once selected the following input boxes will be displayed:



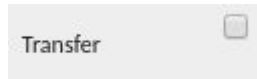
Send an email ☒

E-mail Address

Custom Subject


Custom Body

-
13. In the “Email Address,” input box type the desired email addresses.
 14. In the “Custom Subject” input box, type a custom email subject line if desired.
 15. In the “Custom Body” input box, type a custom email body if desired.
 16. Below the “Send an email” input box, the following checkbox is displayed:




The description of the checkbox is explained below:

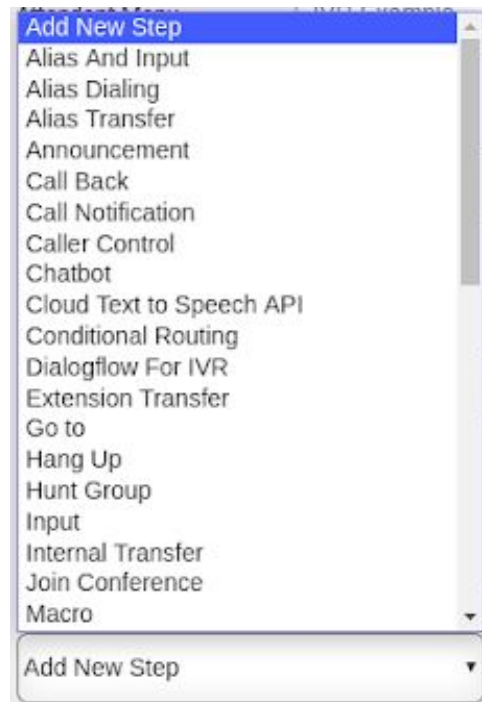
Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

17. Click the save button,  .

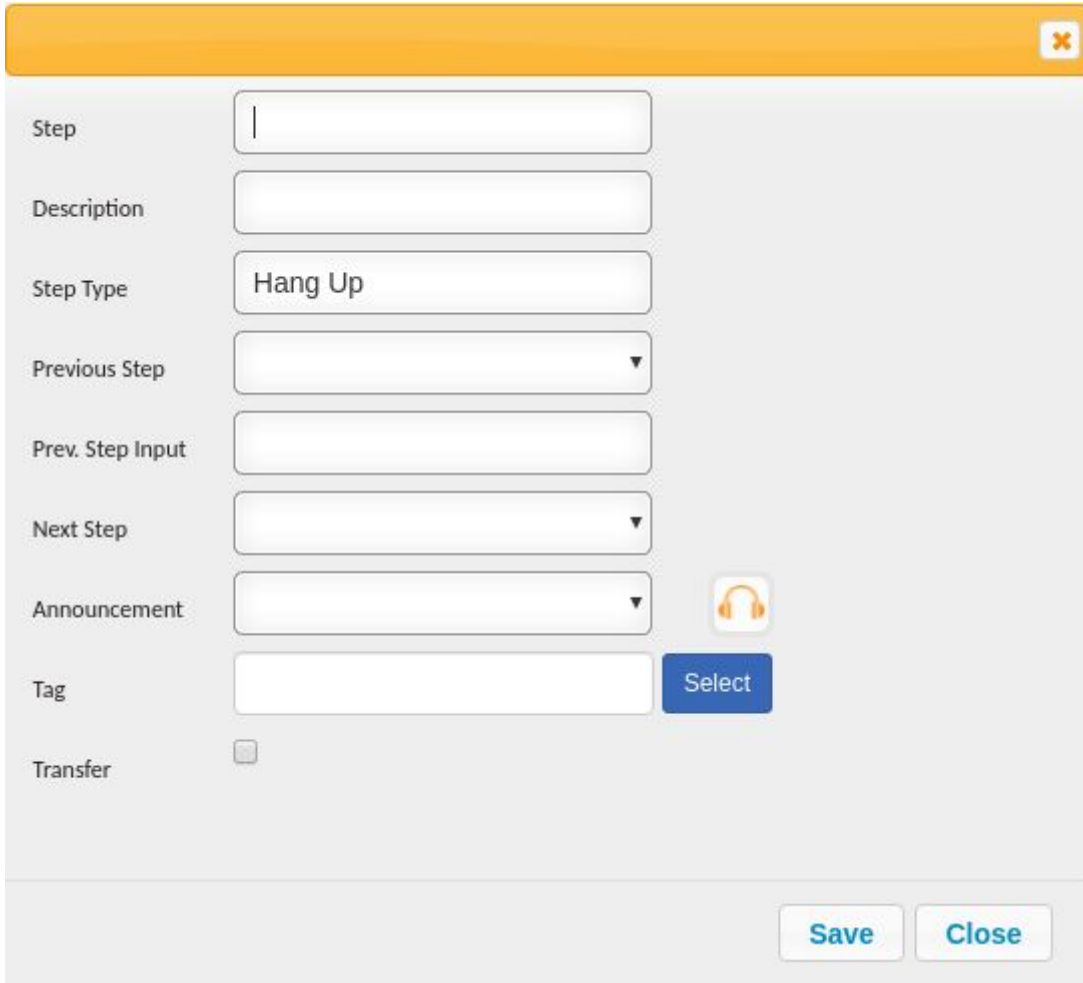
Adding Hang Up Step

The step is used to disconnect the call.

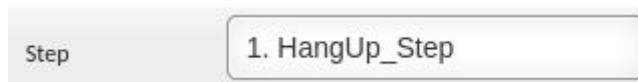
1. Click the “Add New Step” dropdown box,  , the following list will appear:



2. Select the “Hang up” step the following pop-up window will appear:

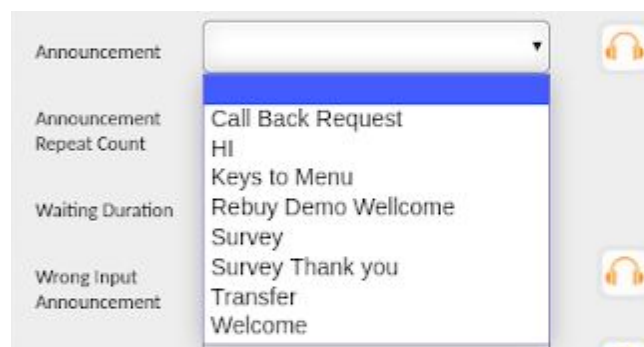



3. Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).

7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

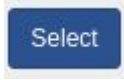


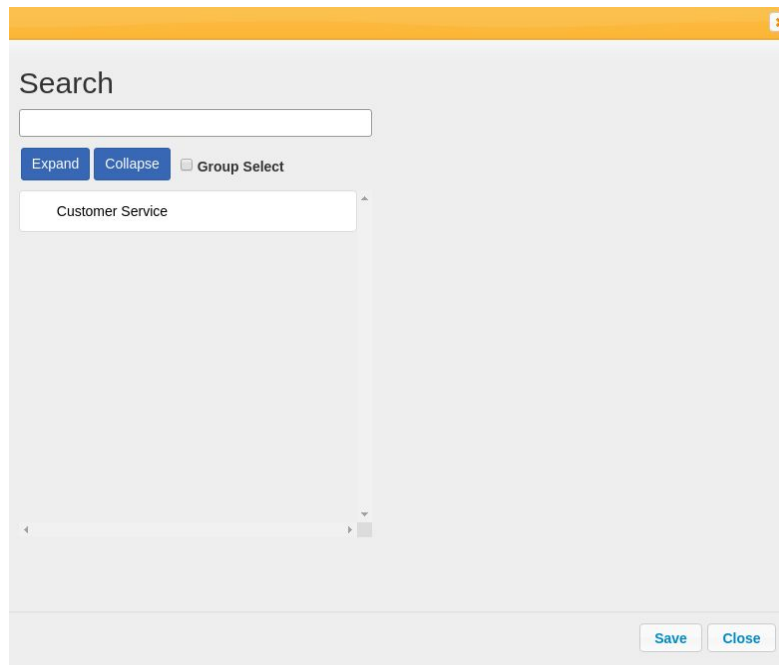
Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. If desired, a Custom Announcement name can be created by checking the “Custom Announcement” checkbox. The following input box will appear:



10. In the input box, type the custom announcement name.

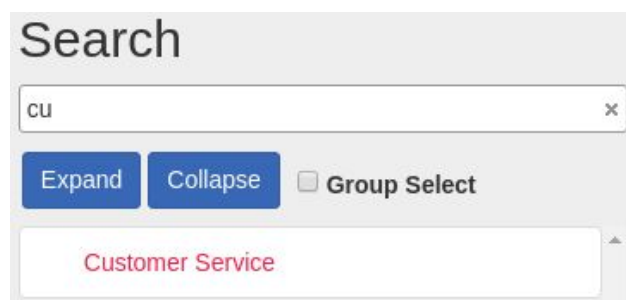
11. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:




12. Search for a Tag using the “Search” input box shown below:




Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



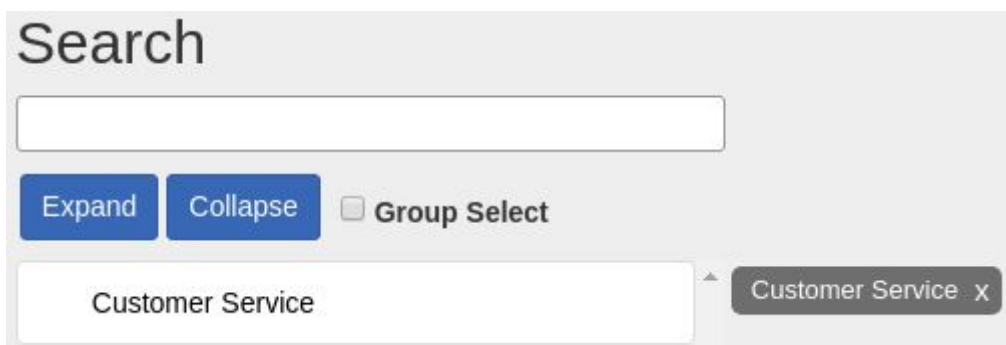
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

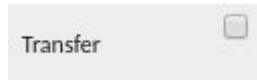
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:

The screenshot shows a search interface with a title "Search" and a text input field. Below the input field are three buttons: "Expand", "Collapse", and "Group Select" (which has an unchecked checkbox). At the bottom, there is a tag list box containing the text "Customer Service". To the right of this box, a small upward-pointing arrow is visible. Further to the right, a separate box displays "Customer Service" followed by an "X" icon, indicating a selected tag.

Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

13. Below the tag's input box, the following checkbox is displayed:

A light gray rectangular button with the word "Transfer" in black text on the left and a small, empty square checkbox on the right.

The description of the checkbox is explained below:


Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

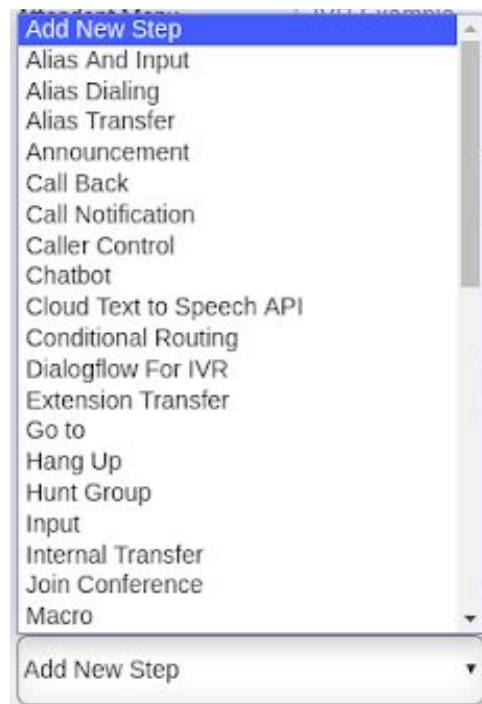
14. Click the save button,

A light gray rectangular button with the word "Save" in blue text.

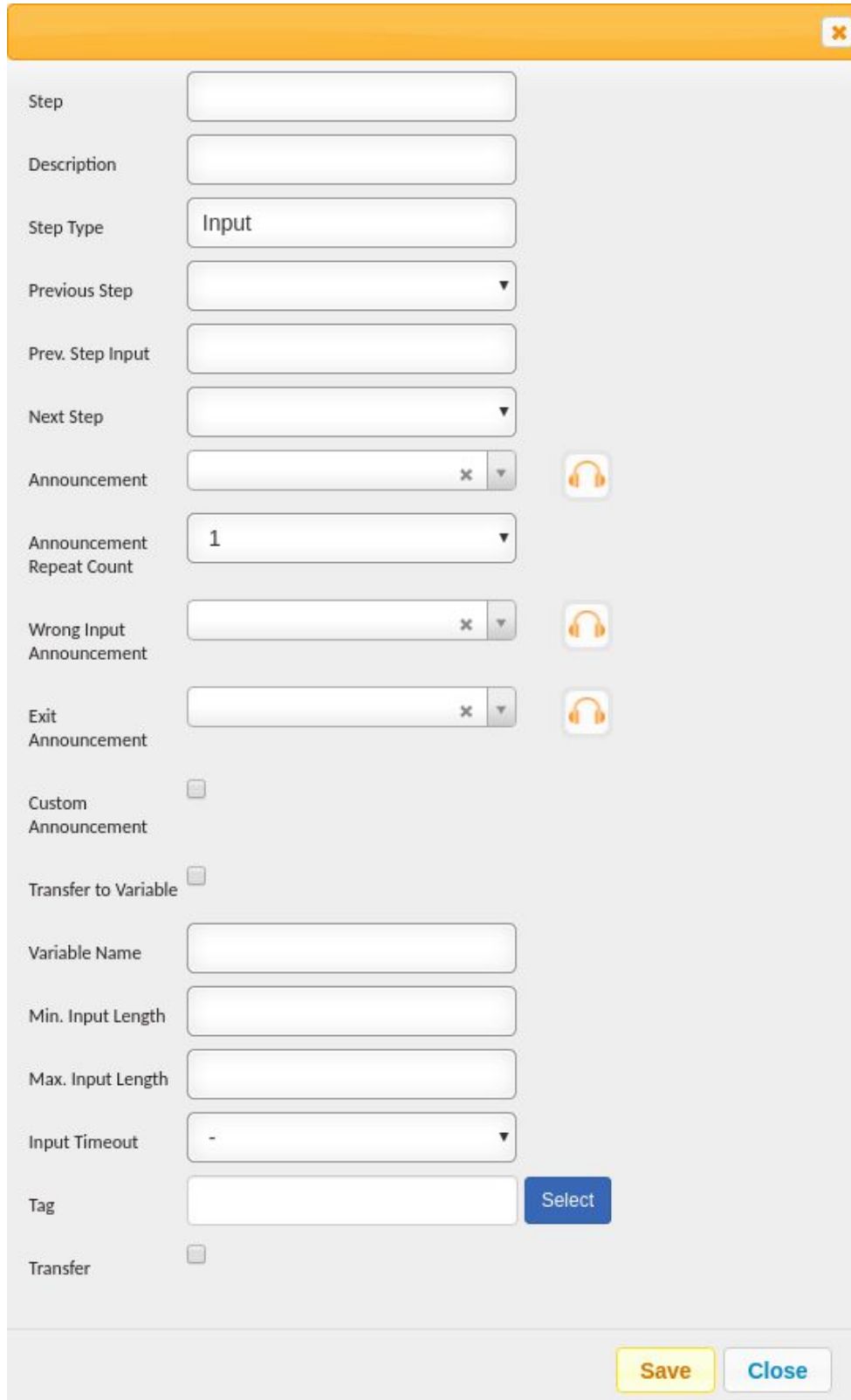
Adding Input Step

The step is used to create an input step for the caller based on an announcement.

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Input” step the following pop-up window will appear:



Step

Description

Step Type: Input

Previous Step

Prev. Step Input

Next Step

Announcement

Announcement Repeat Count: 1

Wrong Input Announcement

Exit Announcement

Custom Announcement

Transfer to Variable

Variable Name

Min. Input Length

Max. Input Length

Input Timeout: -

Tag

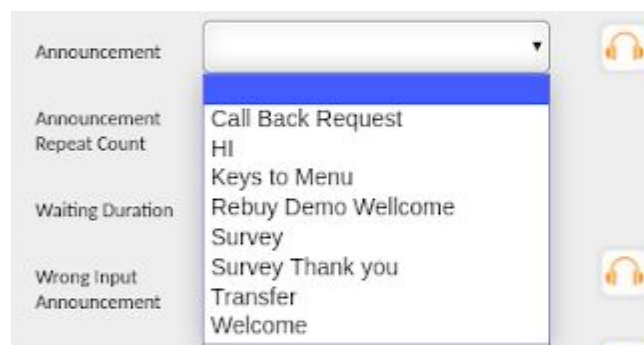
Transfer


Save Close

3. Click the “Step” input box, type the desired step name. An example is shown below:

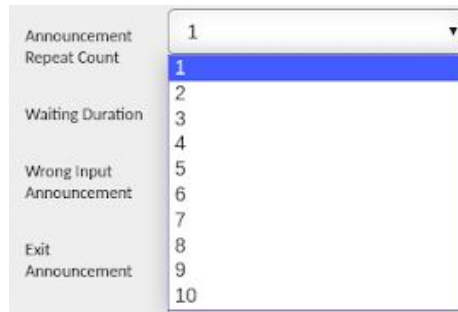


4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. Click the “Announcement Repeat Count” input box the following dropdown list will appear:

A screenshot of a software interface showing a dropdown menu. The menu is open, displaying a list of numbers from 1 to 10. The number '1' is highlighted in blue. To the left of the dropdown, the text 'Announcement Repeat Count' is visible. Other labels like 'Waiting Duration', 'Wrong Input Announcement', and 'Exit Announcement' are also visible on the left side of the interface.

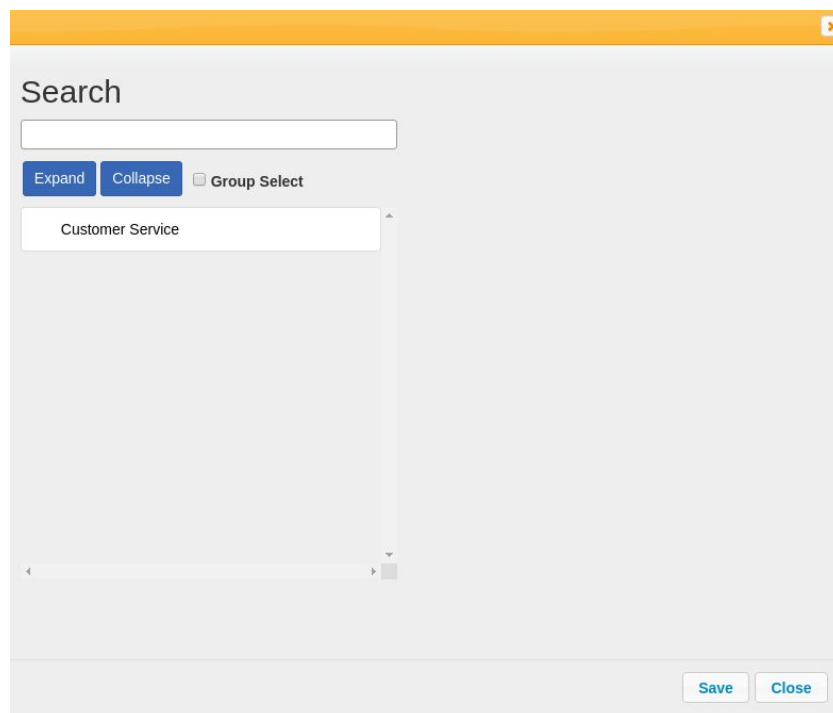
10. Select the desired repeat count.
11. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
12. Click the “Exit Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
13. If desired, a Custom Announcement name can be created by checking the “Custom Announcement” checkbox. The following input box will appear:

A screenshot of a software interface showing a checkbox labeled 'Custom Announcement'. The checkbox is checked, and a text input box is visible below it, containing a single vertical line cursor.

14. In the input box, type the custom announcement name.
15. The agent can transfer to a variable by checking the “Transfer to Variable” checkbox.
16. If the “Transfer to Variable” checkbox is checked, click the “Variable Name” input box and type the desired variable name (user’s name).

17. Click the “Min. Input Length” input box type the minimum input length, always “1.”
18. Click the “Max. Input Length” input box type the maximum input length for the customer to select. For example, if the Alias’s range between 3 digits and 4 digits, the max input length will be 4.
19. In the “Input Timeout,” dropdown box type select the timeout duration for the customer input (Seconds).

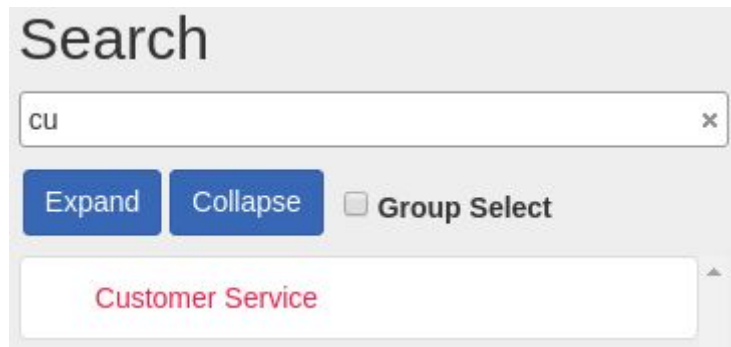
20. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



21. Search for a Tag using the “Search” input box shown below:



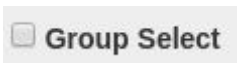
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



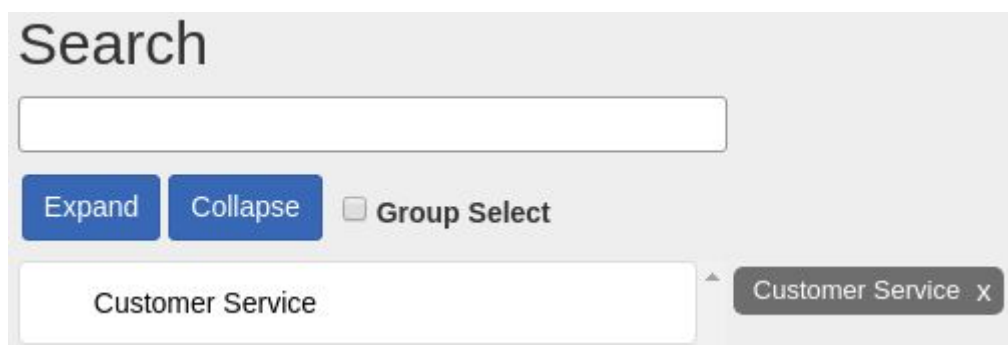
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

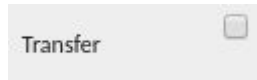
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:




Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

22. Below the tag's input box, the following checkbox is displayed:

A light gray rectangular button with the word "Transfer" in black text on the left and a small, empty square checkbox on the right.


The description of the checkbox is explained below:

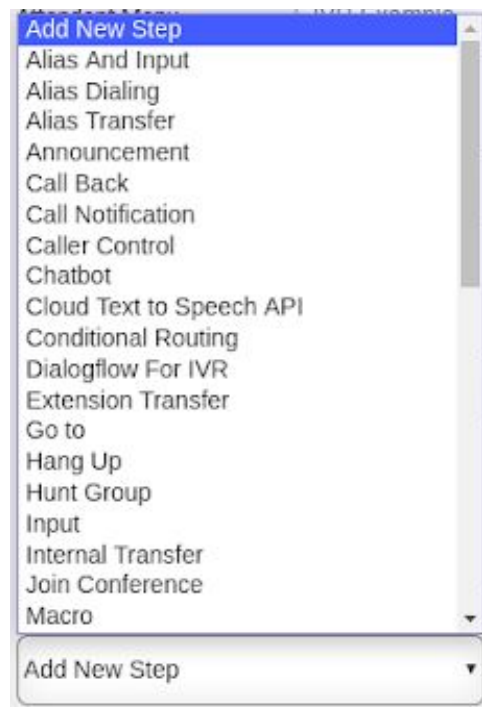
Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

23. Click the save button, .

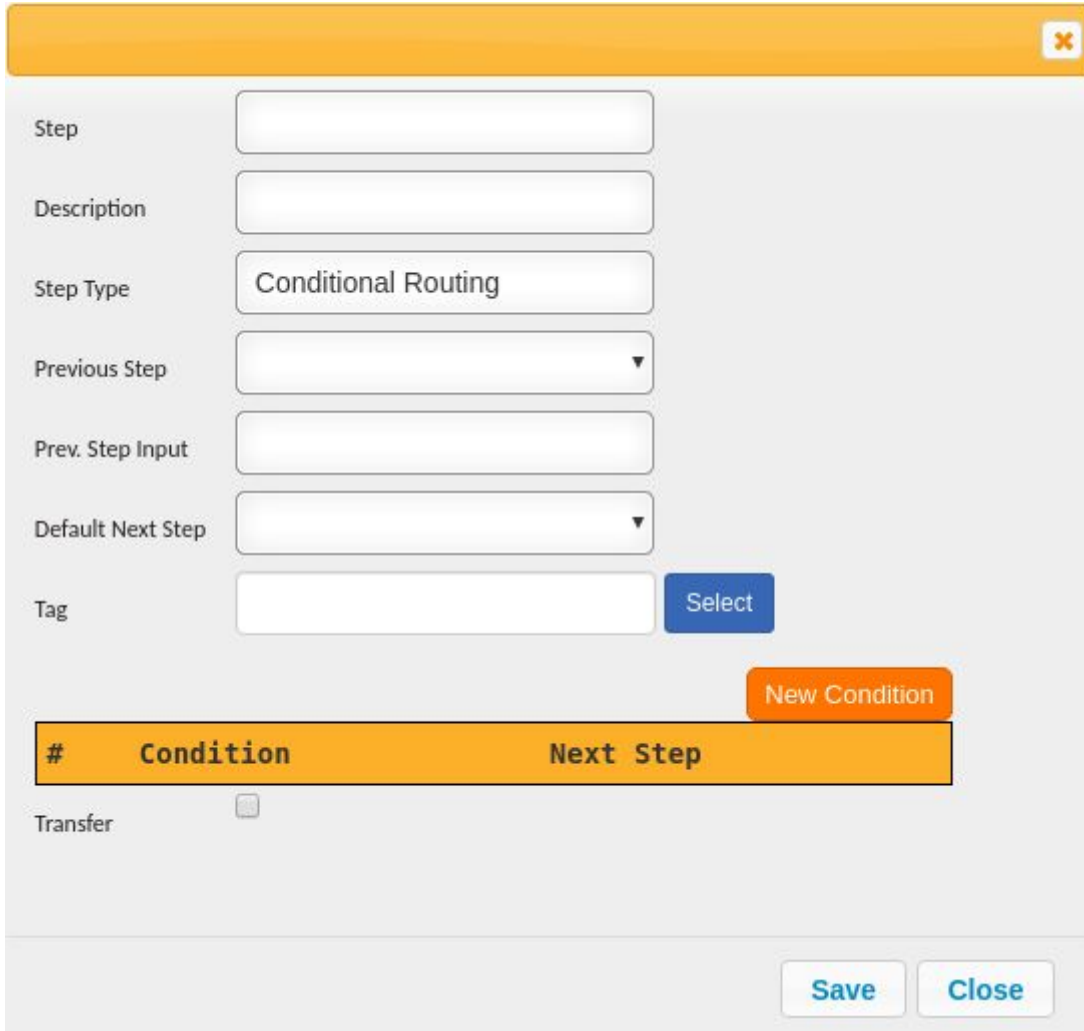
Adding Conditional Routing Step

Enables the call to be sent to a specific step of IVR according to the response returned from the variable or standard responses returned from the web service prepared by the user of the tenant (e.g., Cancellation, Preparing Order, In Cargo).

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Conditional Routing” step the following pop-up window will appear:




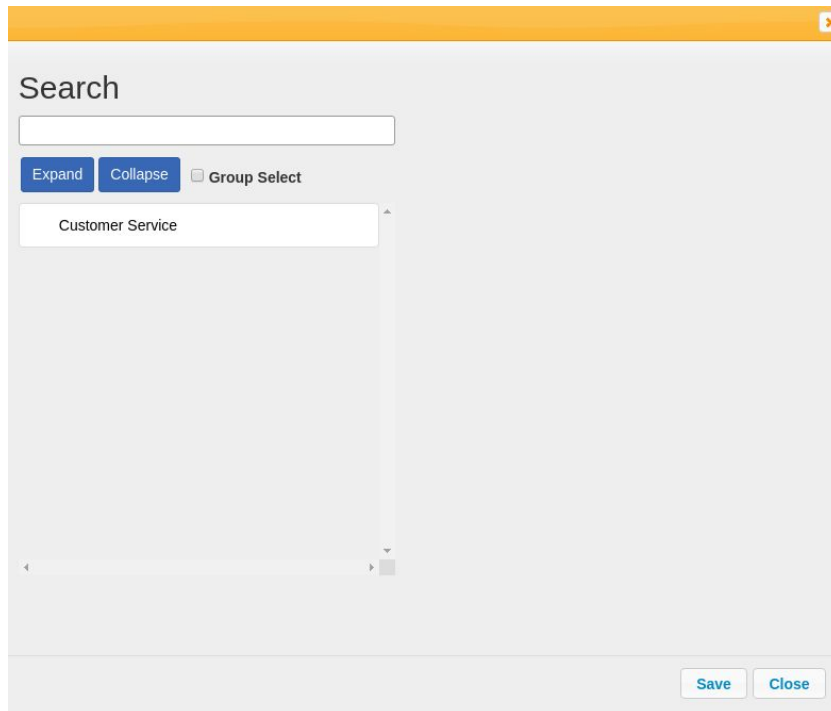
3. Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Default Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.

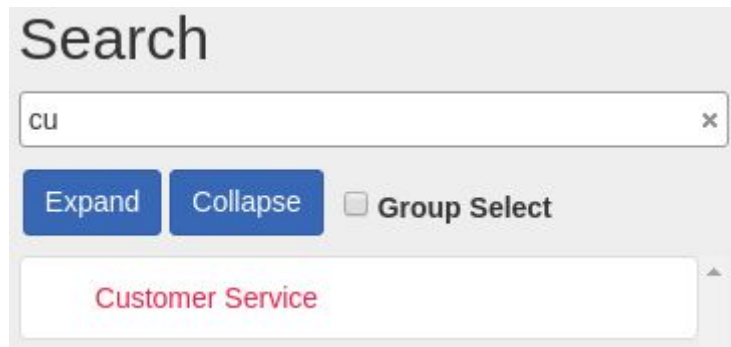
8. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



9. Search for a Tag using the “Search” input box shown below:



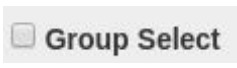
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



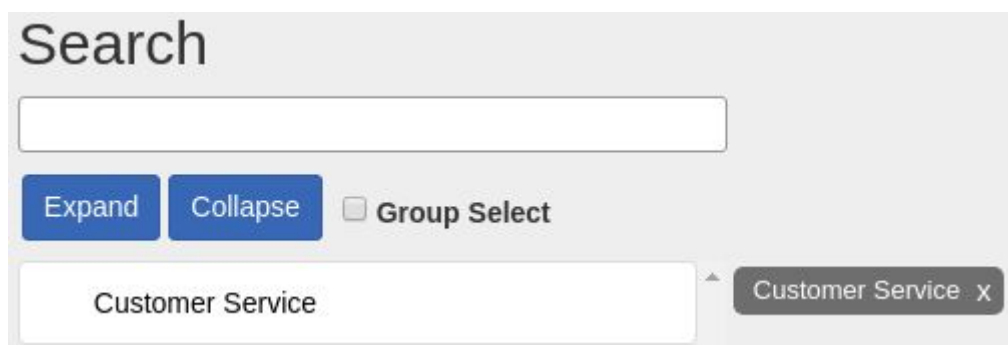
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

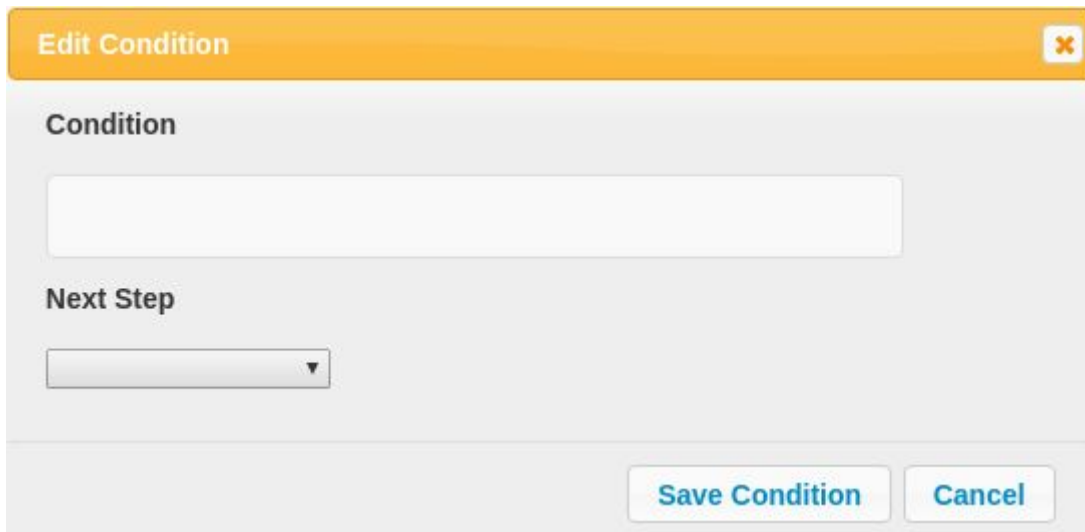
Check the Group Select Checkbox, , to group select tags

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

10. To add a condition, press the new condition button, **New Condition**, the following pop-up screen will appear:

The image shows a pop-up window titled "Edit Condition" with a close button (X) in the top right corner. The window has a light gray background. It contains two main sections: "Condition" and "Next Step". The "Condition" section has a large, empty text input box. The "Next Step" section has a dropdown menu with a downward arrow. At the bottom right of the window, there are two buttons: "Save Condition" and "Cancel".

Edit Condition

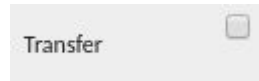
Condition

Next Step

Save Condition **Cancel**


11. In the “Condition” input box, type the condition (Defined value is written in web service).
12. Click the “Next Step” dropdown box, select the desired next step (The step that is desired to correspond to the value is selected). It is recommended to link all steps after setting up the IVR.
13. Click the save condition button, **Save Condition**.
14. Continue adding desired conditions.

15. Below the condition steps, the following checkbox is displayed:

A light gray rectangular button with the word "Transfer" in a dark gray sans-serif font on the left and a small, empty square checkbox on the right.

The description of the checkbox is explained below:


Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

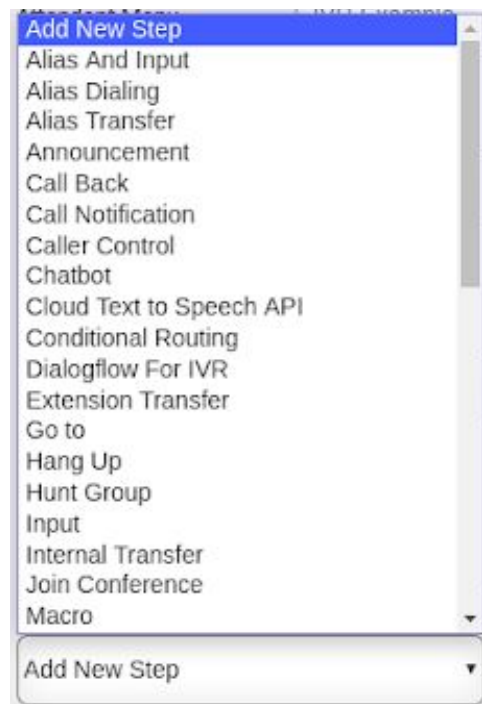
16. Click the save button, .

A light gray rectangular button with the word "Save" in a blue sans-serif font.

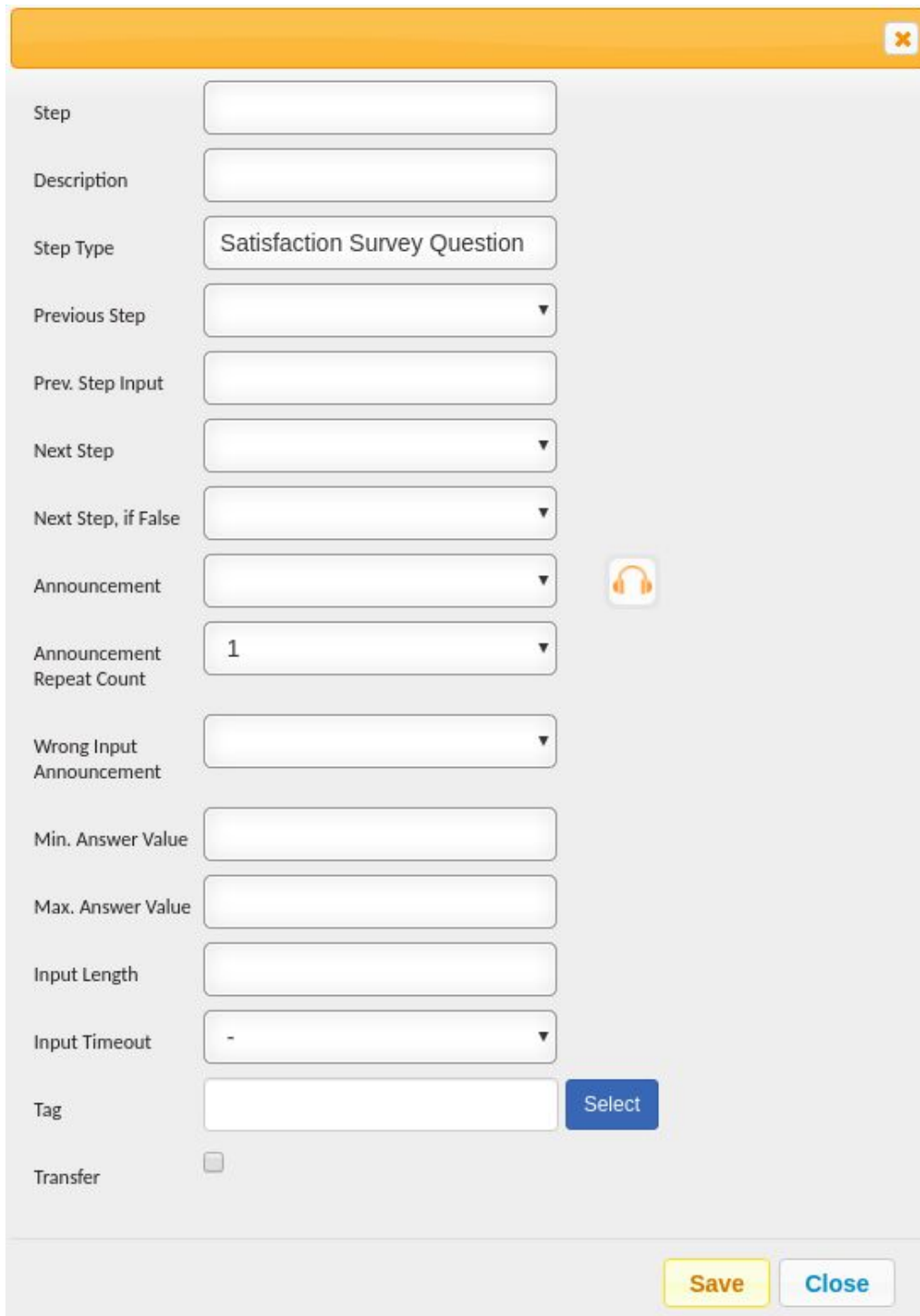
Adding Satisfaction Survey Question Step

The step is used to create a customer satisfaction survey question.


1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Satisfaction Survey Question” step the following pop-up window will appear:

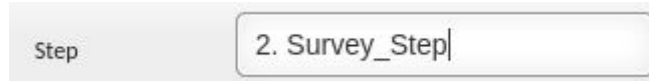


The screenshot shows a configuration window for a 'Satisfaction Survey Question' step. The window has a yellow header bar with a close button (X) in the top right corner. The main area contains a list of configuration fields on the left and a large gray area on the right. The fields are:

- Step:
- Description:
- Step Type:
- Previous Step:
- Prev. Step Input:
- Next Step:
- Next Step, if False:
- Announcement: 
- Announcement Repeat Count:
- Wrong Input Announcement:
- Min. Answer Value:
- Max. Answer Value:
- Input Length:
- Input Timeout:
- Tag:
- Transfer: ☐

At the bottom right of the window are two buttons: 'Save' (yellow) and 'Close' (blue).

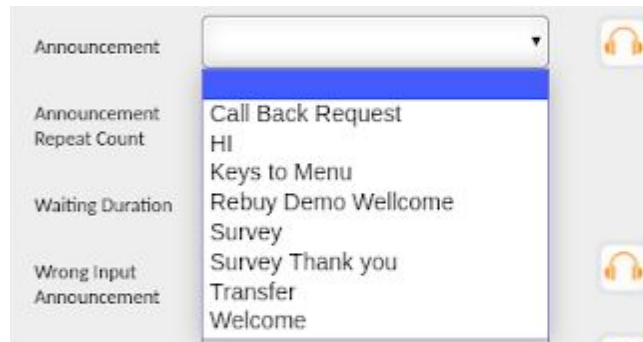
-
- Click the “Step” input box, type the desired step name. An example is shown below:


A screenshot of a software interface showing a label "Step" next to a text input box. The input box contains the text "2. Survey_Step|".

Step	2. Survey_Step
------	----------------

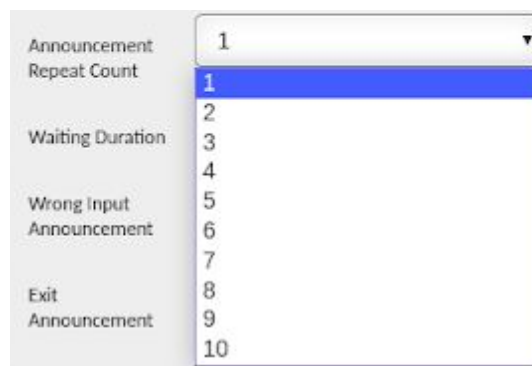
- If desired in the “Description” input box, type a description for the step.
- In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
- Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
- In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
- In the “Next Step if False” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.

9. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:




Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

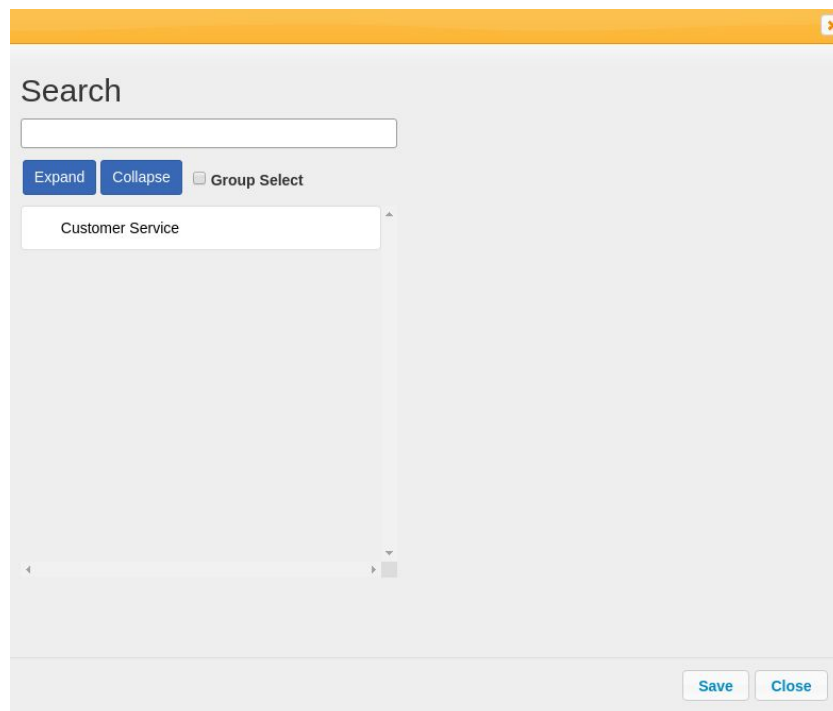
10. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



11. Select the desired repeat count.
12. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

13. Click the “Min. Answer Value” input box type the minimum answer value for the customer to select. For example, if the survey range is 1 to 5, the minimum answer value would be 1.
14. Click the “Max. Answer Value” input box type the maximum answer value for the customer to select. For example, if the survey range is 1 to 5, the maximum answer value would be 5.
15. Click the “Input Length” input box type the input length for the customer to select. For example, if the survey is one question, the input length would be 1.
16. In the “Input Timeout,” dropdown box type select the timeout duration for the customer input (Seconds).

17. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

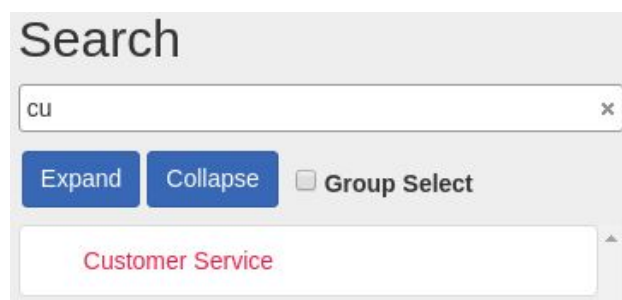


18. Search for a Tag using the “Search” input box shown below:



A search interface with the title "Search" above a text input field.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



The search interface shows the input "cu" and the result "Customer Service" in red text. It includes "Expand" and "Collapse" buttons and a "Group Select" checkbox.

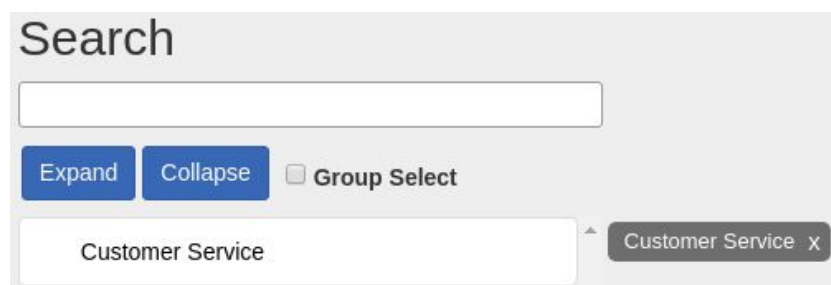
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

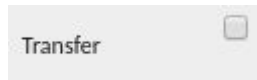
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



The search interface shows the input field empty. The result "Customer Service" is selected and appears in the list box on the left and as a tag with an 'x' on the right.


Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

19. Below the tag's input box, the following checkbox is displayed:




The description of the checkbox is explained below:

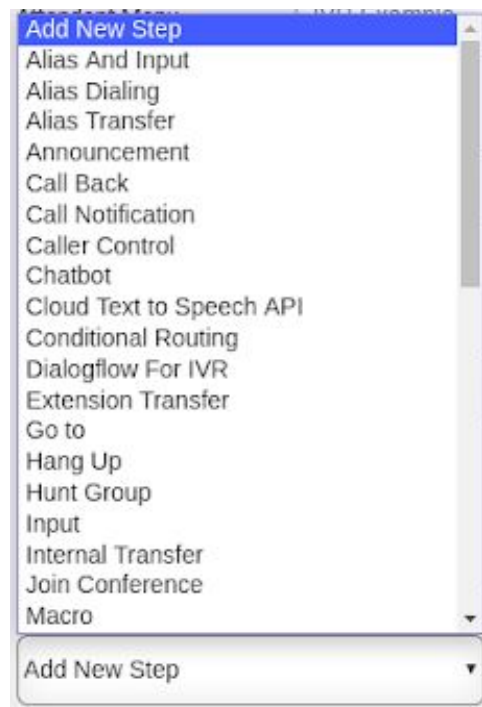
Transfer	Used by the Call Center Studio Development Team (Do not check)
----------	---

20. Click the save button, .

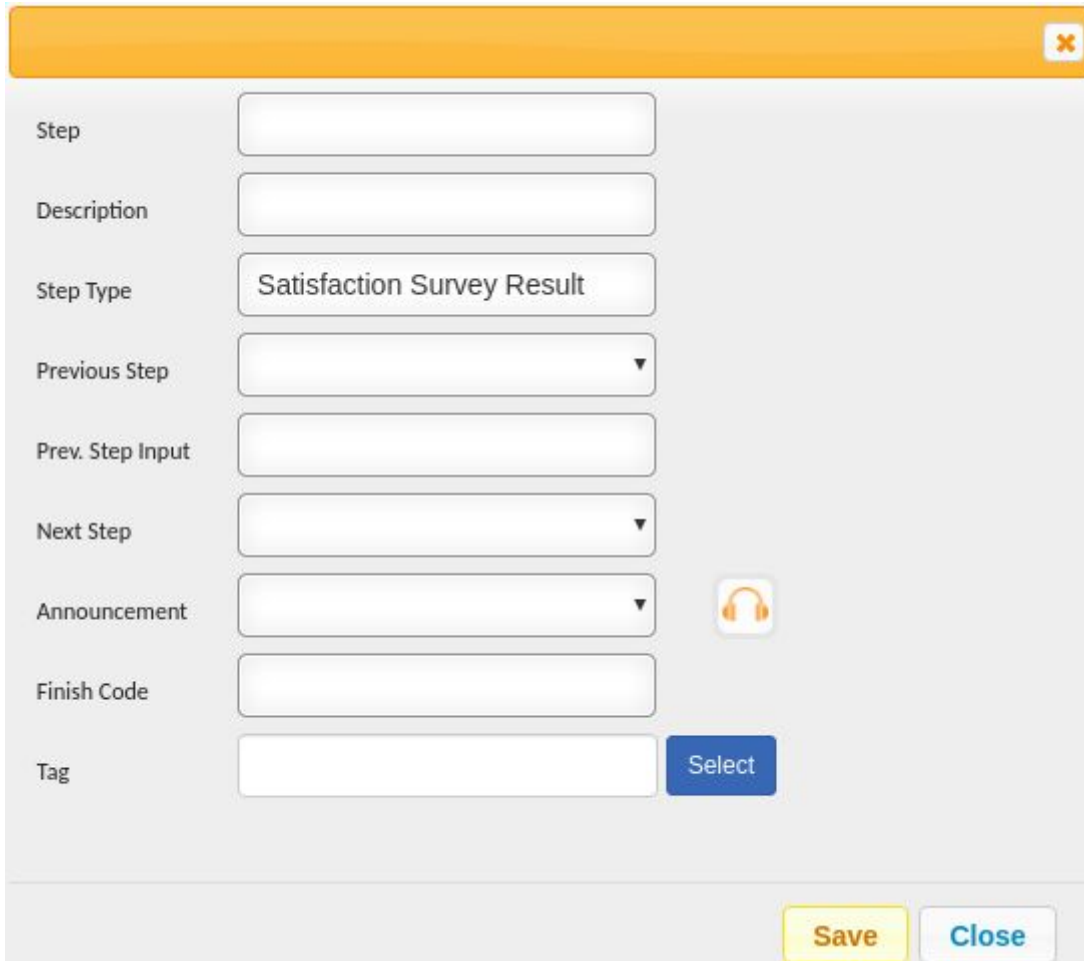
Adding Satisfaction Survey Result Step

The step used to create customer satisfaction input for the satisfaction survey. (Completes the survey, without using this on the Quality Control Screen the survey will be listed as incomplete).

1. Click the “Add New Step” dropdown box, , the following list will appear:

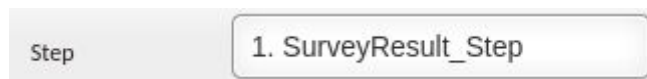


2. Select the “Satisfaction Survey Question” step the following pop-up window will appear:



The screenshot shows a pop-up window with a yellow header bar containing a close button (X). The window contains several input fields and a dropdown menu. The fields are labeled: Step, Description, Step Type, Previous Step, Prev. Step Input, Next Step, Announcement, Finish Code, and Tag. The Step Type field is set to 'Satisfaction Survey Result'. The Previous Step and Next Step fields are dropdown menus. The Announcement field has a speaker icon next to it. The Tag field has a 'Select' button next to it. At the bottom right, there are 'Save' and 'Close' buttons.

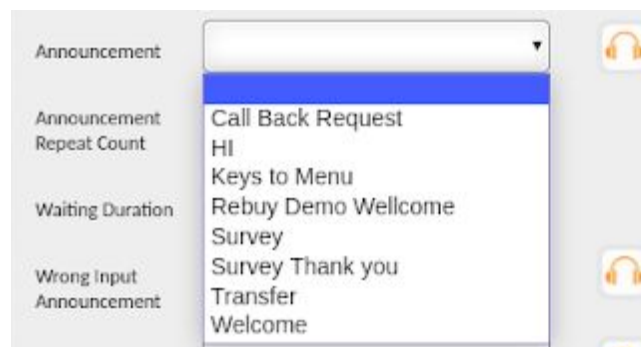
3. Click the “Step” input box, type the desired step name. An example is shown below:




The screenshot shows a single input box with the label 'Step' and the text '1. SurveyResult_Step' entered.

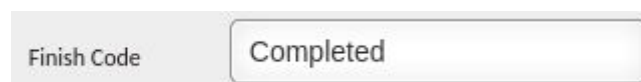
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

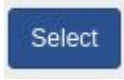
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:

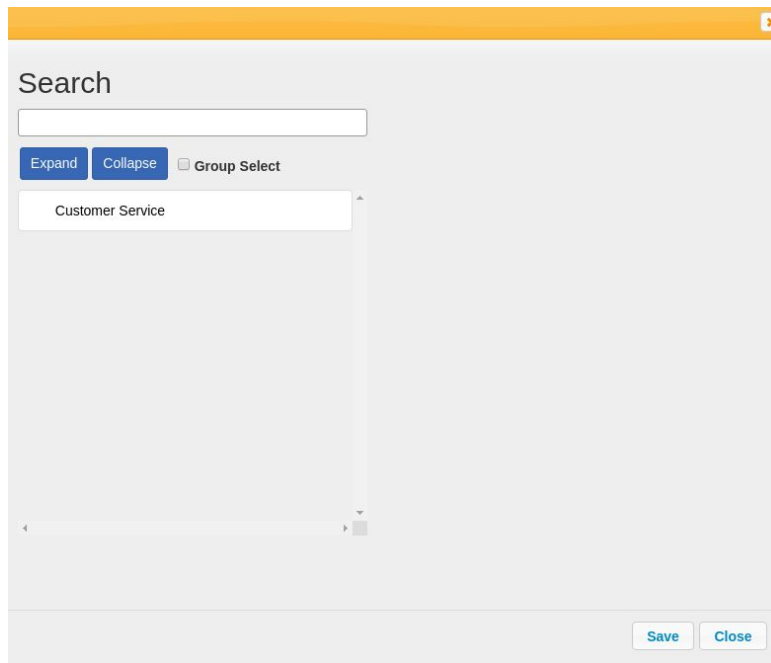


Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. Click the “Finish Code” input box, type the desired finish code an example is shown below:



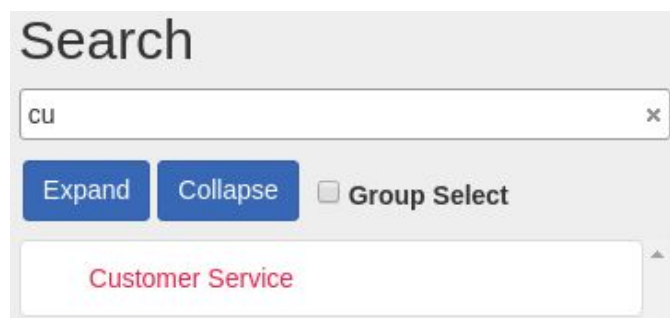
10. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



11. Search for a Tag using the “Search” input box shown below:



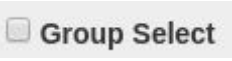
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



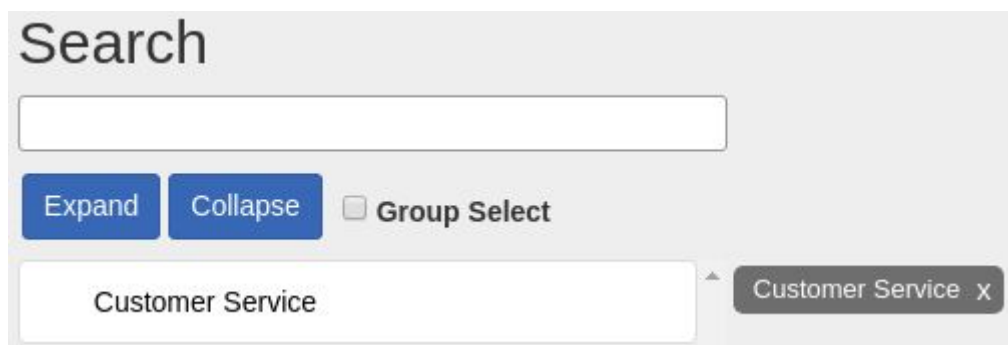
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection


Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:




Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

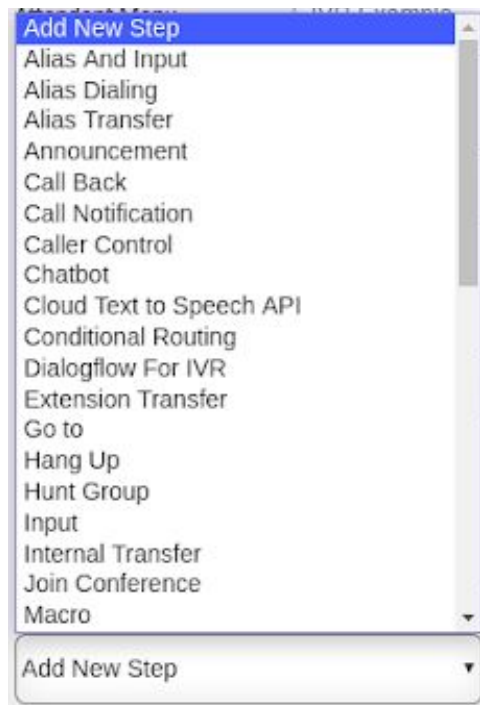
12. Below the tag's input box, the following checkbox is displayed:

13. Click the save button, .

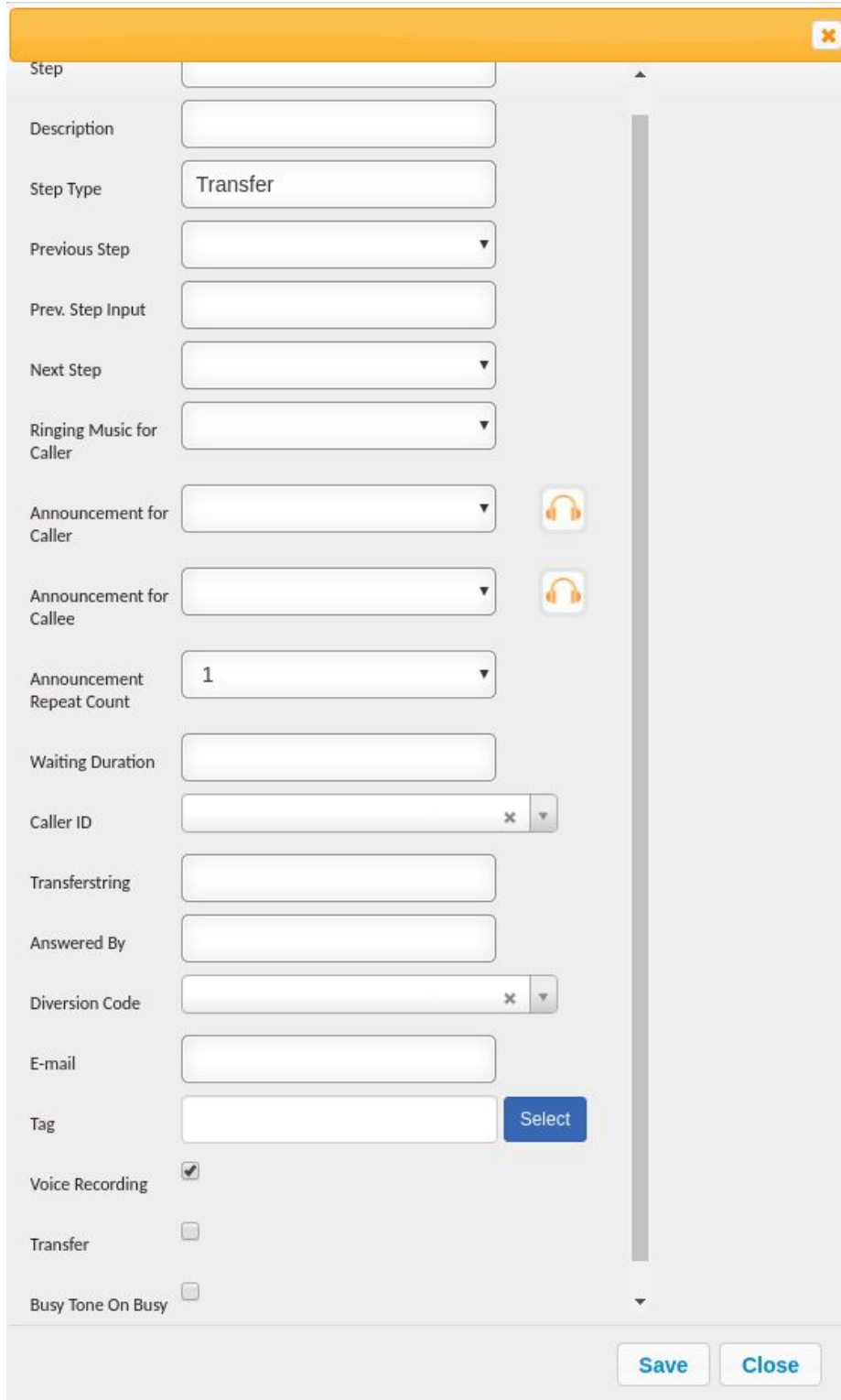
Adding Transfer Step

In cases where the system cannot be active due to internal/external factors or out of time, incoming calls are directed using this step to the desired number so that there are no missed calls.

1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Transfer” step the following pop-up window will appear:



Step

Description

Step Type: Transfer

Previous Step

Prev. Step Input

Next Step

Ringing Music for Caller

Announcement for Caller

Announcement for Callee

Announcement Repeat Count: 1

Waiting Duration

Caller ID

Transferstring

Answered By

Diversion Code

E-mail

Tag

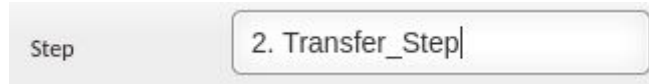
Voice Recording ☒

Transfer ☐


Busy Tone On Busy ☐

Save Close

-
- Click the “Step” input box, type the desired step name. An example is shown below:

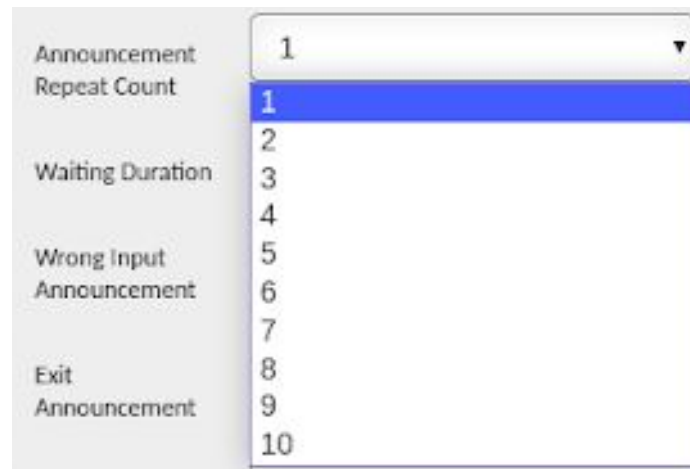
A screenshot of a web interface showing a label 'Step' next to a text input box. The input box contains the text '2. Transfer_Step'.

- If desired in the “Description” input box, type a description for the step.
- In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
- Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
- In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
- Click the “Ringing Music for Caller,” a dropdown list will appear, select the desired music (Ringing music can be added by request to the Call Center Studio Development Team).
- Click the “Announcement for Caller” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.


- Click the “Announcement for Callee” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

11. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



The screenshot shows a dropdown menu for the 'Announcement Repeat Count' field. The menu is open, displaying a list of numbers from 1 to 10. The number 1 is currently selected and highlighted in blue. The background of the form is light gray, and the dropdown list has a white background with a blue border.


12. Select the desired repeat count.
13. In the “Waiting Duration” input box type the waiting duration for the customer input (Seconds) an example is shown below:

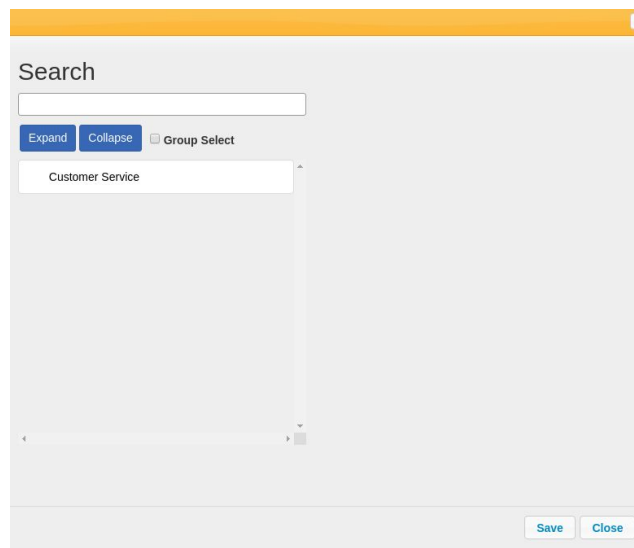


The screenshot shows the 'Waiting Duration' input box. The text 'Waiting Duration' is on the left, and the input box on the right contains the number '10'.

14. Click the “Caller ID” input box. A dropdown list will appear with available numbers created in the Dialplan section. (See Dialplan section for more information).
15. Click the “Transfer String” input box, type a transfer string:
(SIP/operator name used / number to be transferred)
16. In the “Answered By,” input box type the desired user’s name.
17. Click the “Diversion Code” dropdown box, type the diversion code. (Code provided by the Telco operator, so that the customer’s actual phone number can be displayed, if desired the Call Center Studio Development team can prepare this).

18. In the “Email” input box, type the desired email addresses to receive notifications regarding the transfer step of the IVR.

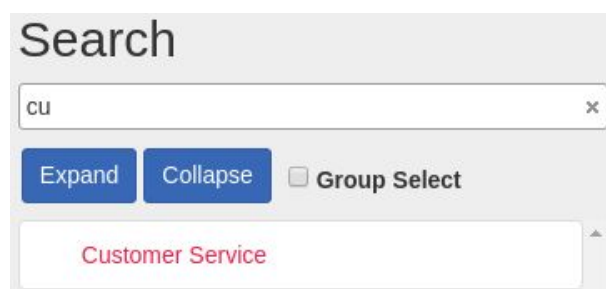
19. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



20. Search for a Tag using the “Search” input box shown below:



Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



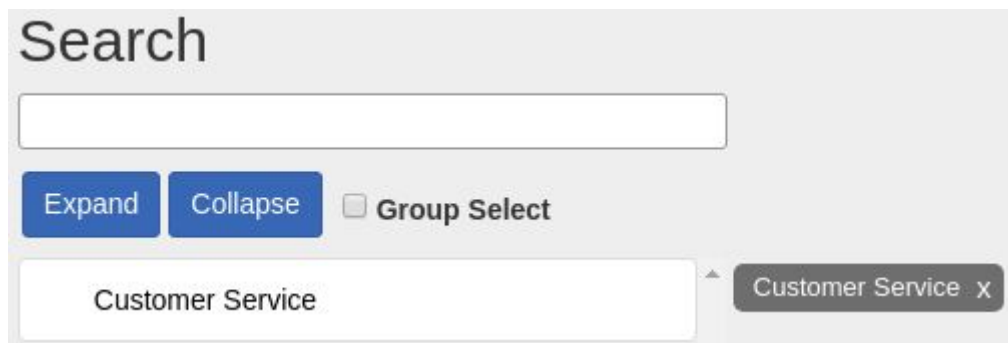
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

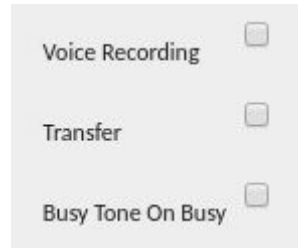
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

21. Below the tag's input box, the following four checkboxes are displayed:




Voice Recording ☐

Transfer ☐

Busy Tone On Busy ☐


The descriptions of these checkboxes are explained below:

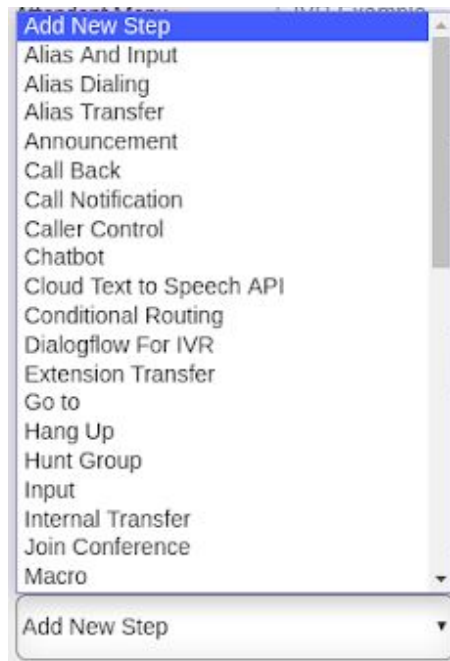
Voice Recording	If checked, records the IVR
Transfer	Used by the Call Center Studio Development Team (Do not check)
Busy Tone on Busy	It creates a busy tone for the transferee when the person transferred to is on the other line.

22. Click the save button,  .

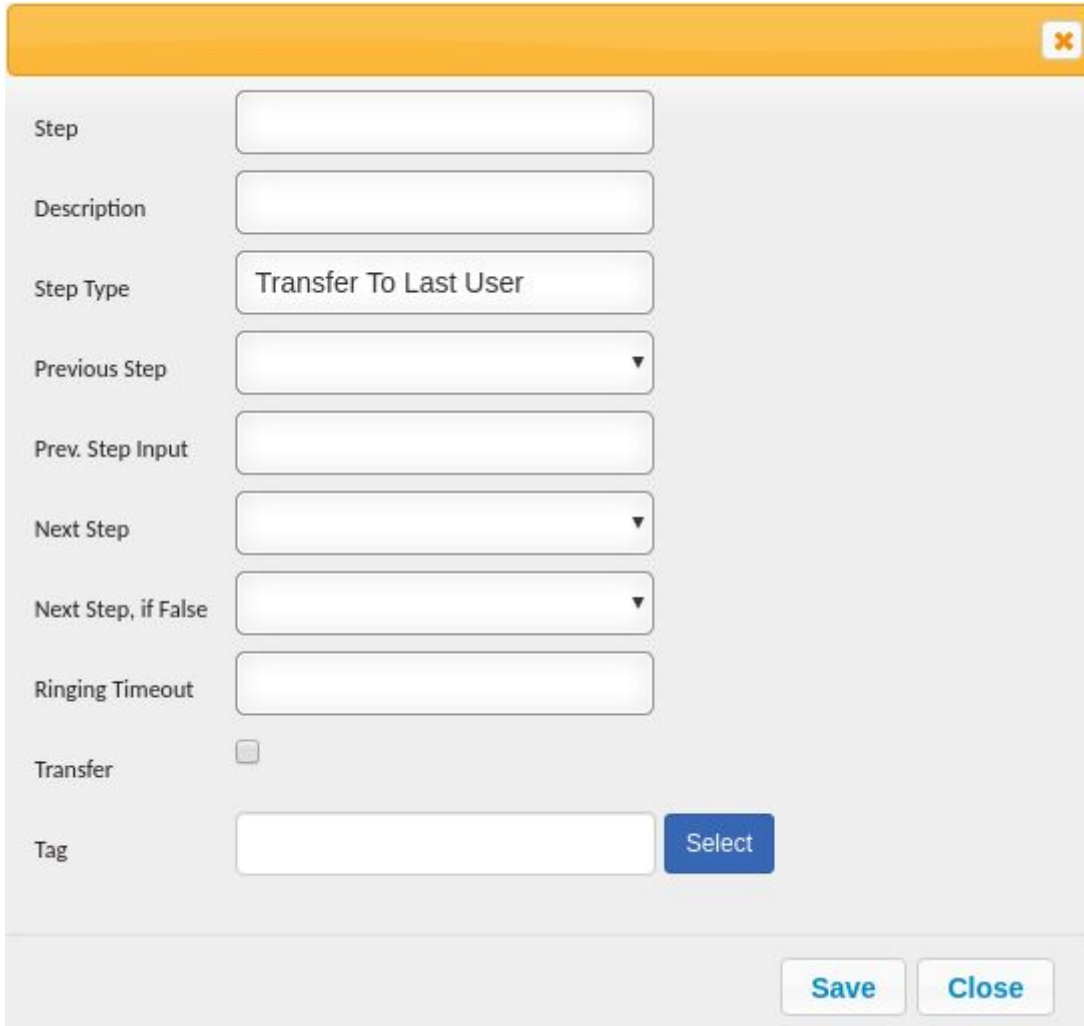
Adding Transfer to Last User Step

The step is used to transfer to the last user without switching to a different step. In cases where the last customer representative is not active, the call is terminated if the next step is not defined, and if defined, it is directed to the selected step. If the caller number has not been connected to a customer representative before, if the call control is wrong, it relates to the next step. If the call cannot be answered by the last user during the ring time, it is transferred to the next step.

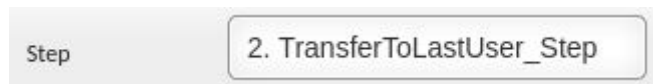
1. Click the “Add New Step” dropdown box, , the following list will appear:



2. Select the “Transfer To Last User” step the following pop-up window will appear:




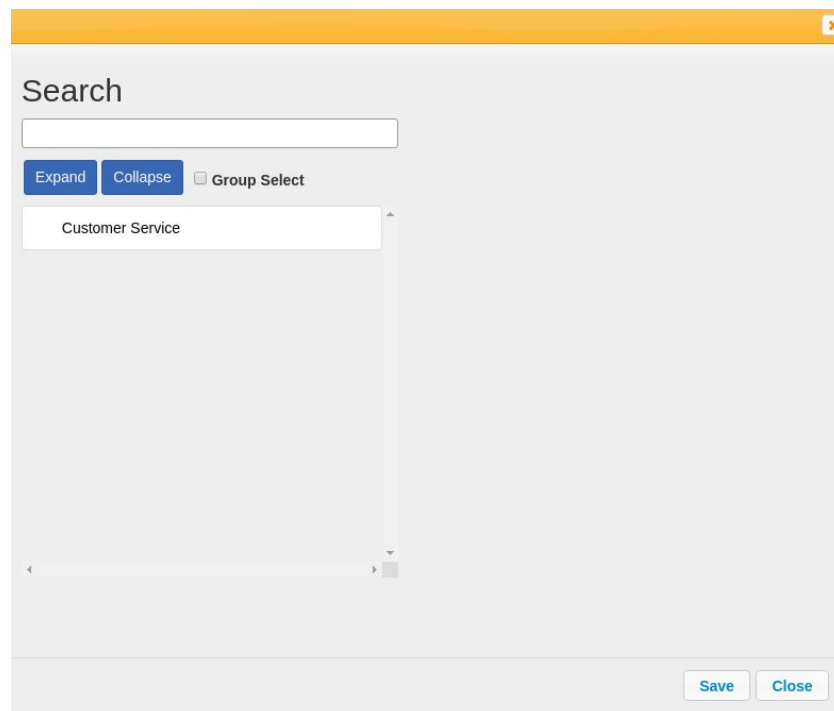
3. Click the “Step” input box, type the desired step name. An example is shown below:



4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. In the “Next Step if False” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
9. In the “Ringing Timeout” input box, type the desired ringing Timeout (Seconds).
10. Do not check the “Transfer” checkbox (Used only by the Call Center Studio Development Team).

11. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

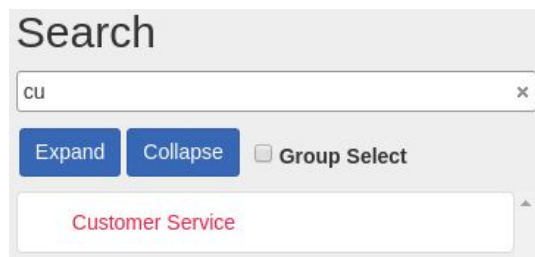


12. Search for a Tag using the “Search” input box shown below:



A search input box with the label "Search" above it. The input field is empty and has a light gray border.

Note: Partial Tag names can be used for searching purposes all tags with the partial name will have their name appear in red font as shown below:

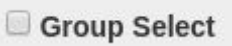


A search interface showing results for the input "cu". The results list contains one item, "Customer Service", which is displayed in red text. Above the list are buttons for "Expand", "Collapse", and a "Group Select" checkbox.

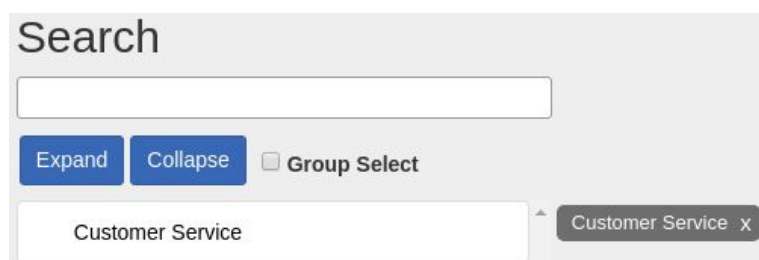
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection


Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:




A search interface showing results for the input "Customer Service". The results list contains one item, "Customer Service", which is displayed in black text. To the right of the list is a button labeled "Customer Service" with a small "X" icon. Above the list are buttons for "Expand", "Collapse", and a "Group Select" checkbox.

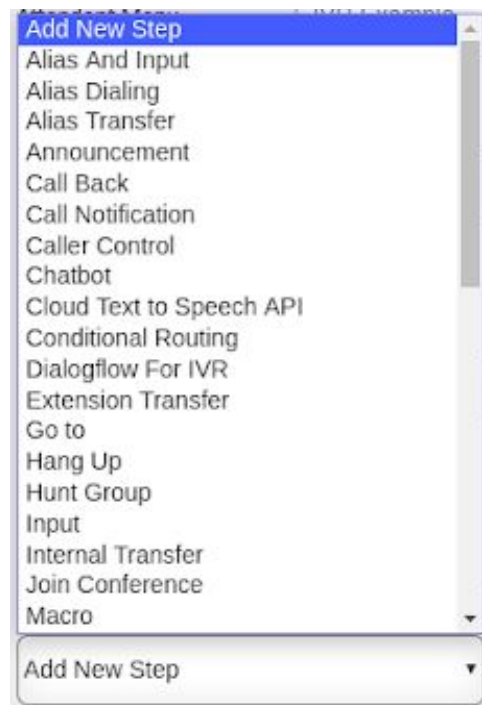
Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

13. Click the save button, .

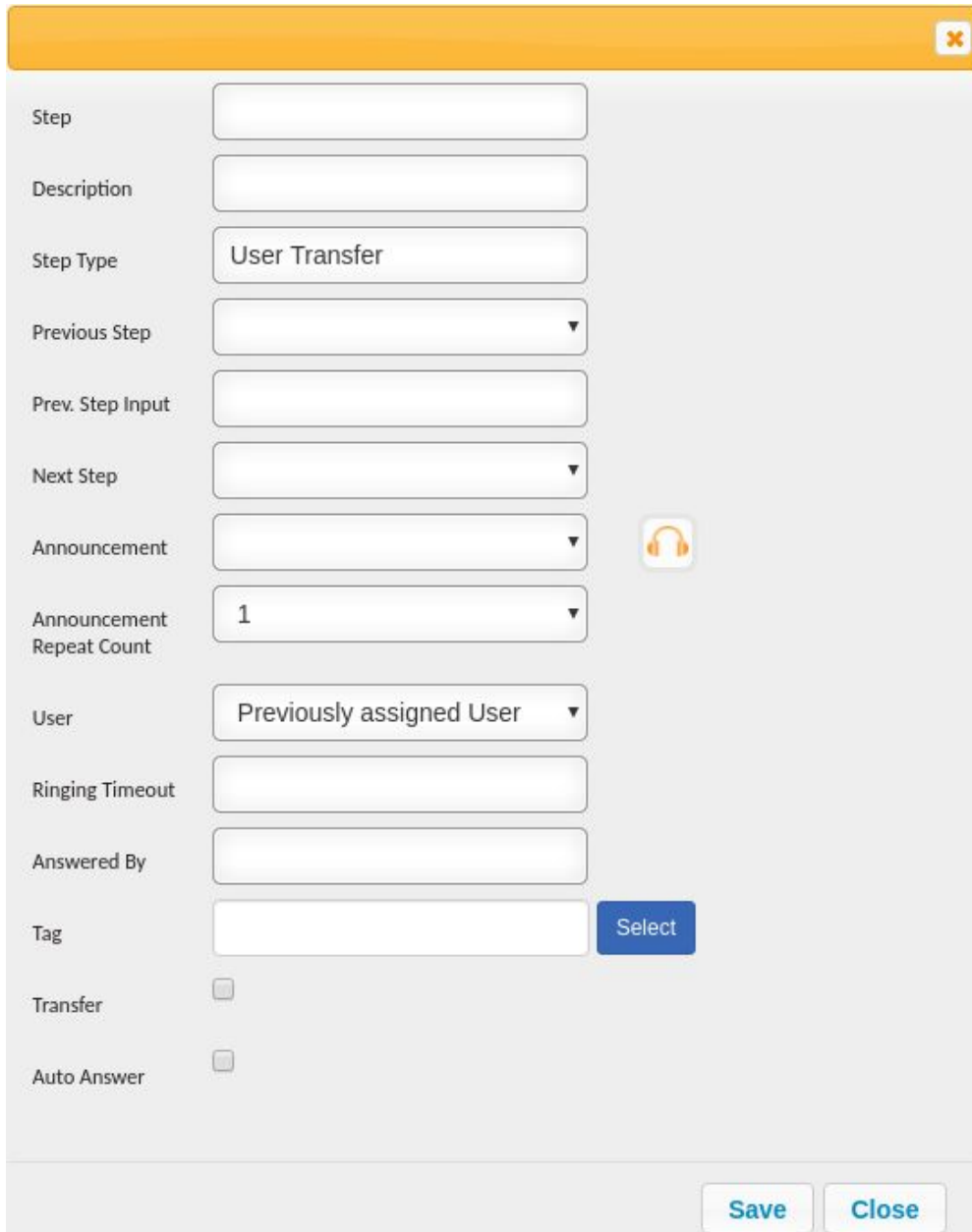
Adding User Transfer Step

It is used to ensure that incoming calls are transferred to the selected user without being assigned to a particular queue. For calls to arrive, the Agent does not need to switch to "available" status, it is sufficient to have default or custom status. If the user is not in the system at the time of the call, the call is transferred to the next step. If the next step is not selected, the call is automatically closed by the system.

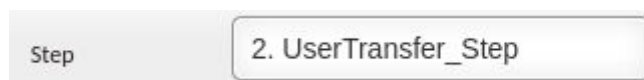
1. Click the “Add New Step” dropdown box,  , the following list will appear:



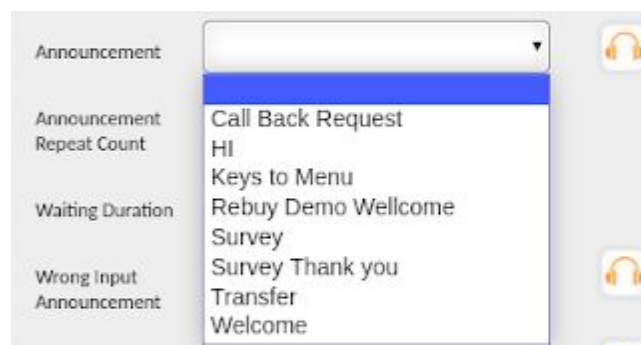
2. Select the “User Transfer” step the following pop-up window will appear:




3. Click the “Step” input box, type the desired step name. An example is shown below:

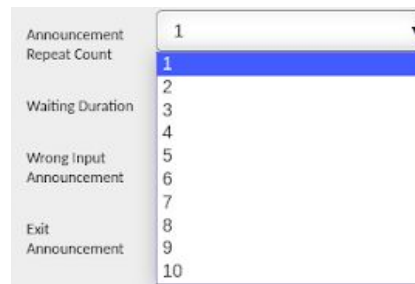


4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:




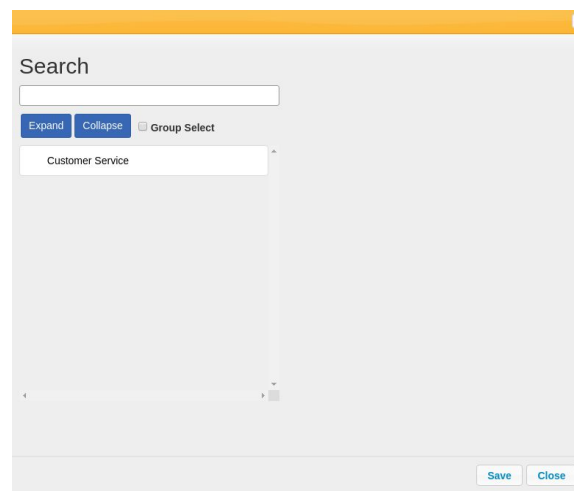
Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

9. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



10. Select the desired repeat count.
11. In the “User” dropdown list, select the desired agent to transfer to, or select previously assigned user (used to route the call back to the agent that the customer was previously speaking to).
12. In the “Ringing Timeout” input box, type the desired ringing Timeout (Seconds).
13. Check the “Transfer” checkbox if desired.
14. In the “Ringing Timeout” input box, type the desired ringing Timeout (Seconds).

15. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:

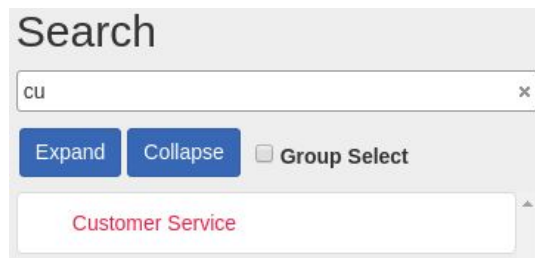


16. Search for a Tag using the “Search” input box shown below:



A search input box with the label "Search" above it. The input field is empty and has a light gray border.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:




A search interface showing the results for the search term "CU". The search box contains "CU" and a close button. Below the search box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". The search results are displayed in a list box, showing "Customer Service" in red text.

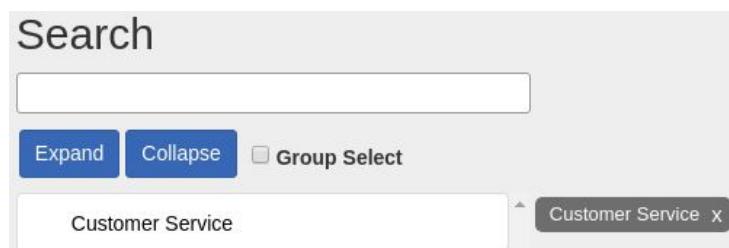
Note:

Press the Expand button, , to expand the selection


Press the Collapse button, , to collapse the selection

Check the Group Select Checkbox, , to group select tags.

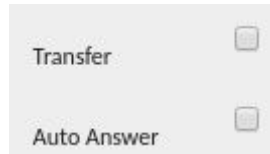
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



A search interface showing the results for the search term "Customer Service". The search box is empty. Below the search box are two buttons: "Expand" and "Collapse", and a checkbox labeled "Group Select". The search results are displayed in a list box, showing "Customer Service" in black text. To the right of the list box, the selected tag "Customer Service" is displayed with a close button (X).


Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

17. Below the tag's input box, the following two checkboxes are displayed:




The descriptions of these checkboxes are explained below:

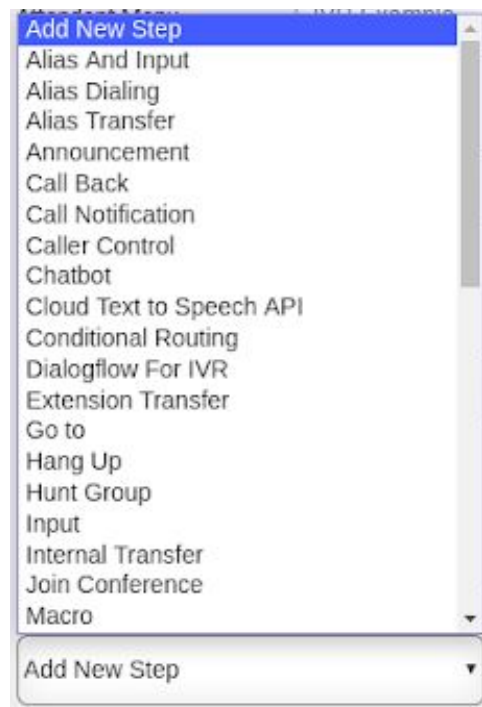
Transfer	Used by the Call Center Studio Development Team (Do not check)
Auto Answer	When transferred allows the user to answer automatically without having to click the answer button.

18. Click the save button,  .

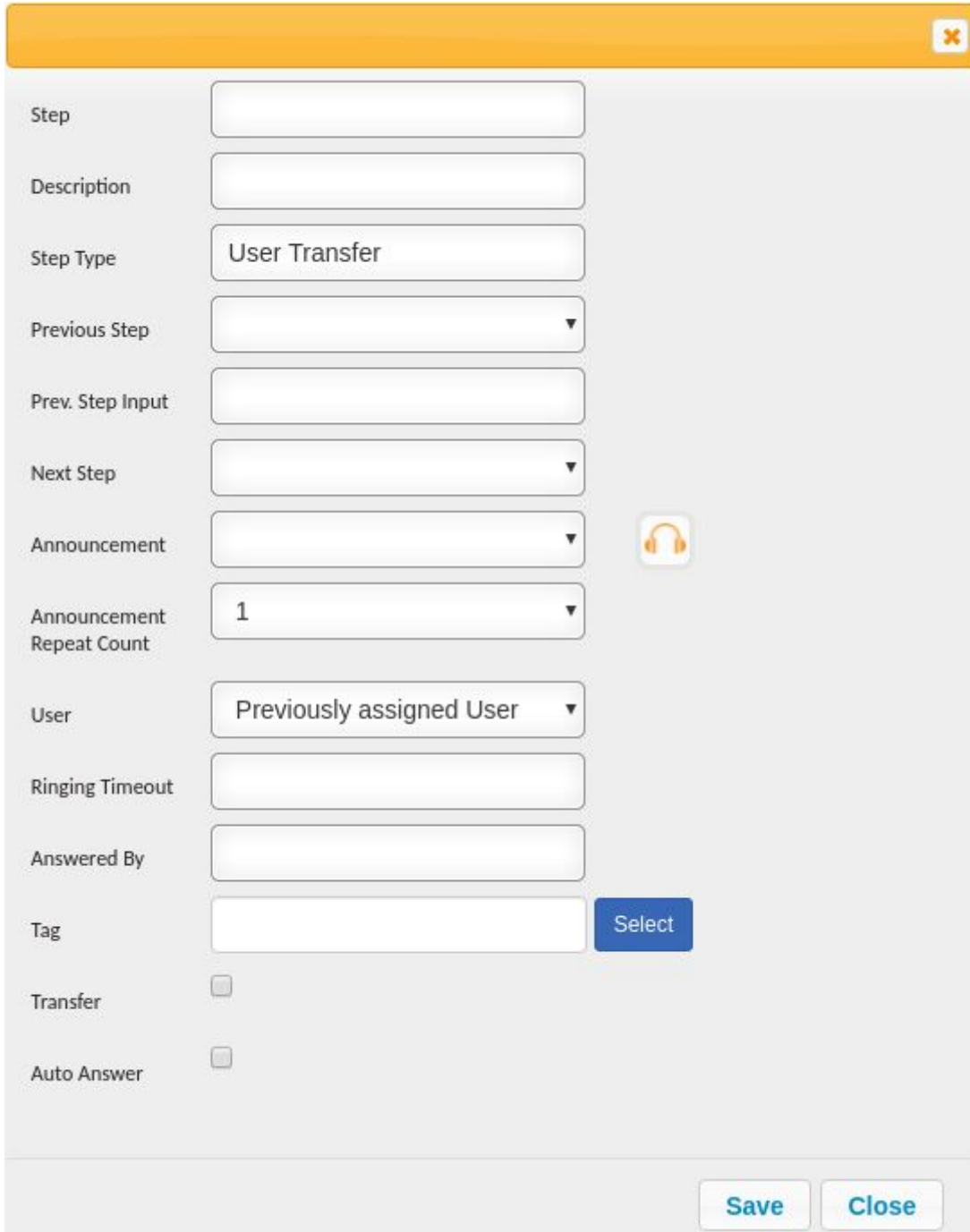
Adding Voicemail Step

When incoming calls are forwarded to this step, voicemails are sent to the specified email address.


1. Click the “Add New Step” dropdown box,  , the following list will appear:



2. Select the “User Transfer” step the following pop-up window will appear:

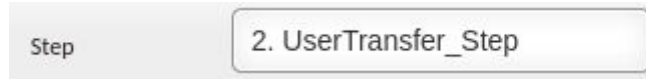


A pop-up window titled "User Transfer" with a close button (X) in the top right corner. The window contains a list of configuration fields for a call step:

- Step:
- Description:
- Step Type:
- Previous Step: ▼
- Prev. Step Input:
- Next Step: ▼
- Announcement: ▼ 
- Announcement Repeat Count: ▼
- User: ▼
- Ringing Timeout:
- Answered By:
- Tag:
- Transfer: ☐
- Auto Answer: ☐

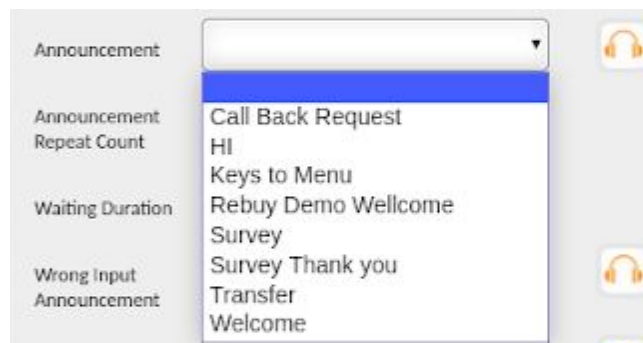
At the bottom right of the window are two buttons: and .

3. Click the “Step” input box, type the desired step name. An example is shown below:





A screenshot of a web form. On the left, there is a label "Step" in a light gray box. To its right is a text input field containing the text "2. UserTransfer_Step".

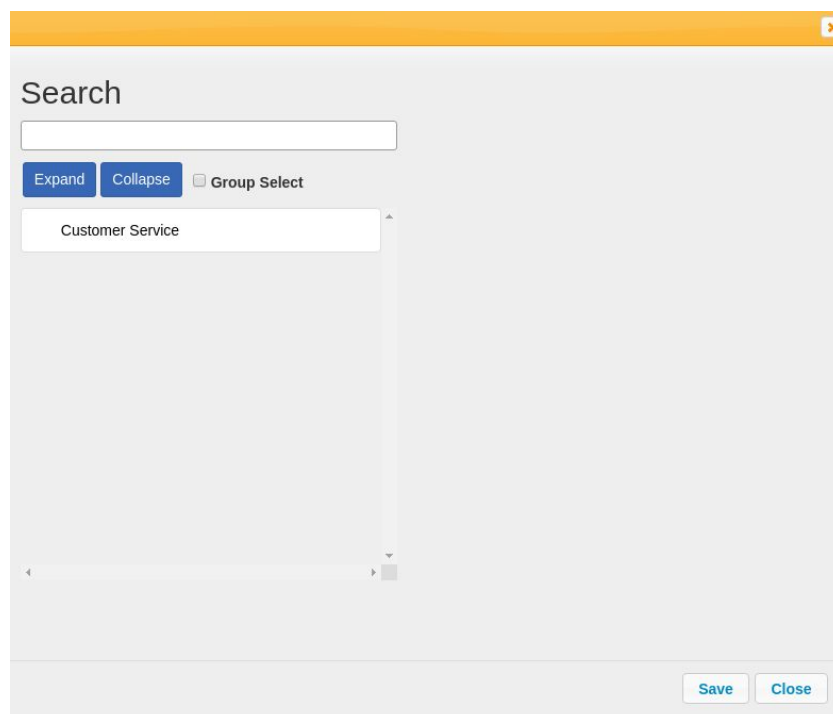
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
8. Click the “Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement. An example dropdown menu of created announcements is shown below:



A screenshot of a web form showing a dropdown menu for "Announcement". The dropdown is open, displaying a list of announcements: "Call Back Request", "HI", "Keys to Menu", "Rebuy Demo Wellcome", "Survey", "Survey Thank you", "Transfer", and "Welcome". To the right of the dropdown, there is a small icon of a headset.

Note: Announcements can be listened to by clicking the following button, , located to the right of each Announcement dropdown list.

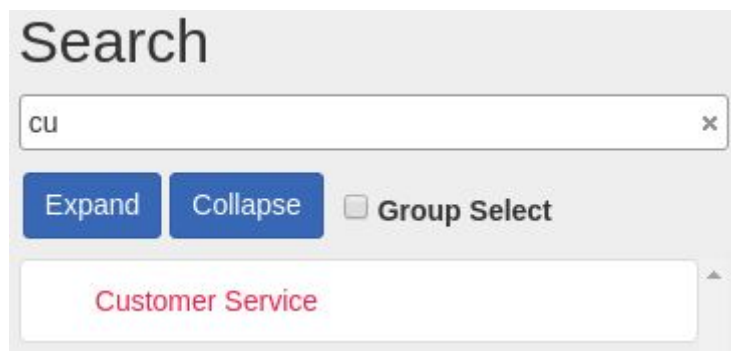
9. In the “Email” input box, type the desired email that the callback request will be sent to. (Note: multiple emails can be inputted using a comma, “,” to separate them. If the number of emails is over five, a group email is recommended to allow for successful email delivery.)
10. In the “Input Timeout,” input box type select the timeout duration for the customer input (Seconds).
11. Check the “Exit on DTMF input” checkbox if desired. (When selected allows the customer to choose any number to end the call)
12. If a tag is desired, click the Select button,  to the right of the “Tag” input box, the following pop-up window will appear:



13. Search for a Tag using the “Search” input box shown below:

A screenshot of a search interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box with a thin gray border. A small vertical line is visible at the start of the input box, indicating the cursor position.

Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:

A screenshot of a search results interface. At the top, the word "Search" is displayed in a large, bold, black font. Below it is a white rectangular input box containing the text "cu" and a small "x" icon on the right. Below the input box are two blue buttons labeled "Expand" and "Collapse", followed by a checkbox labeled "Group Select". Below these buttons is a white rectangular box containing the text "Customer Service" in red font. A small upward-pointing arrow is visible on the right side of this box.

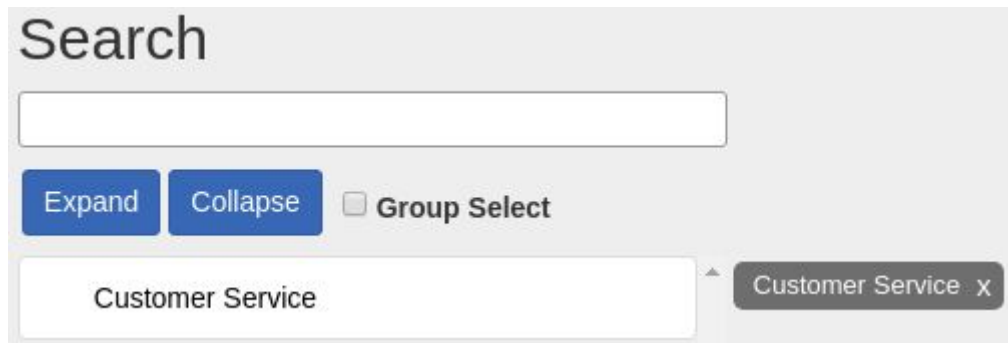
Note:


Press the Expand button, , to expand the selection

Press the Collapse button, , to collapse the selection

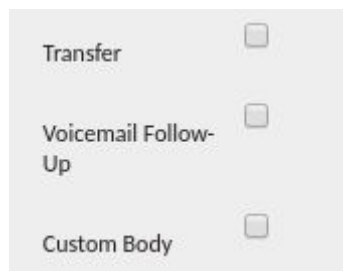
Check the Group Select Checkbox, , to group select tags.

Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the “X,” , to the right of the tag name.

14. If desired, click the “Custom Subject” input box type the desired subject for the voicemail email notification.
15. Below the Custom Subject input box, the following checkboxes are displayed:

A screenshot of a form with three checkboxes. The first checkbox is labeled "Transfer". The second checkbox is labeled "Voicemail Follow-Up". The third checkbox is labeled "Custom Body". All three checkboxes are currently unchecked.


The descriptions of these checkboxes are explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)
Voicemail Follow-Up	<p>When checked, the following input box will be displayed:</p> <div><div>Voicemail Follow-Up Control Time</div><input type="text"/></div> <p>Type the desired control time. Follow-up will be initiated after the control time has passed.</p>
Custom Body	If checked, the custom body input box will be displayed. Type the desired custom email body message.

16. Click the save button,



Editing an IVR

1. To edit an IVR, click the edit button, , located on the far right of the IVR name after the “Call Limit” column as shown below:

Call Limit ▲ 0  

After clicking the edit button, the IVR window will appear as shown:

✕

Edit Attendant

Attendant Menu

Limit is Active

☐

Call can be transferred in

☐

Limit Type

User Status After Transfer

Concurrent Call Limit

Inform the agent if transferred call is hangup

☐

Limit Multiplier

Alias

Overflow Attendant

Credit Card

☐

Add New Step ▾

Add New Step


Name	Type	Previous Step	Next Step	Digit	
IVR Example_Root	Root				

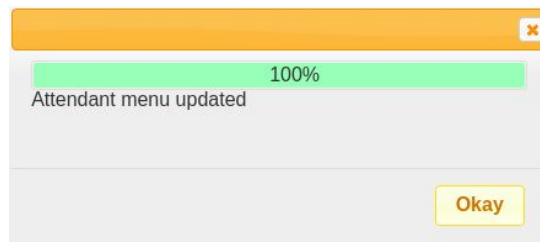
Save

Close

2. Make changes as desired.

-
3. Once the desired changes have been completed, the information can be saved by

clicking the save button, , the following pop-up box will appear:



4. Click the Okay button, , to confirm the changes

Editing an IVR Step


1. After opening the IVR using the “Editing an IVR” instructions, click the edit button,





, located on the far right of the IVR step name after the “Digit” column as shown below:



2. Make changes as desired.

3. Click the save button, .

Deleting an IVR




1. From the Attendant Name list, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:

demo.callcenterstudio.com says

IVR Example attendant menu will be deleted permanently.
Do you want to continue?

Cancel



OK

- Select the cancel button, , to cancel the deletion.
 - Select the OK button, , to confirm the deletion.
2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted incoming chat will not be shown.

Deleting an IVR Step

Note: The Root Step of any IVR cannot be deleted.

1. From the IVR step list within a selected IVR, click the delete button, , to the right of the edit button, . When the delete button is clicked the following pop-up will appear:

demo.callcenterstudio.com says

Step 2 view attendant menu will remove permanently. Do you want to continue?

Cancel

OK

- Select the cancel button, , to cancel the deletion.

- Select the OK button, , to confirm the deletion.

2. Confirm the deletion by clicking the OK button, .

The screen will reload, and the deleted incoming chat will not be shown.

Searching for an IVR Step

1. Click the “Attendant” input box, type the IVR’s name, the input box is shown below:

A screenshot of a user interface element. It consists of a light gray rectangular container. On the left side of the container, the word "Attendant" is written in a gray font. To the right of the text is a white rectangular input field with a thin gray border.

Note: Partial names can be used when spelled correctly.