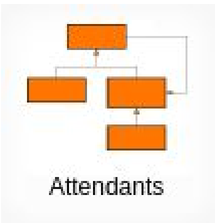
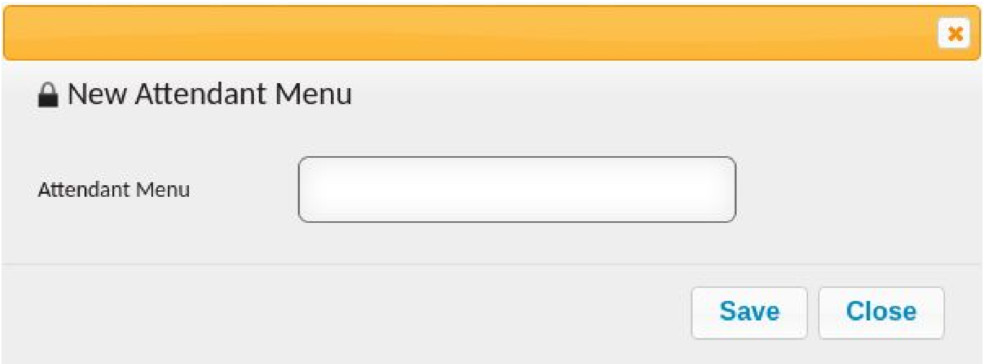
Attendants



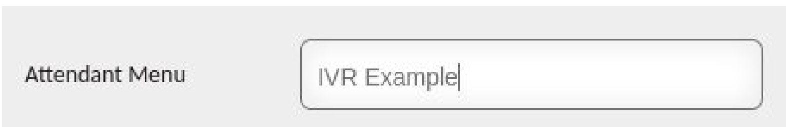
The Attendants screen is where Interactive Voice Response (IVR) trees can be constructed and managed.

Creating an IVR

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

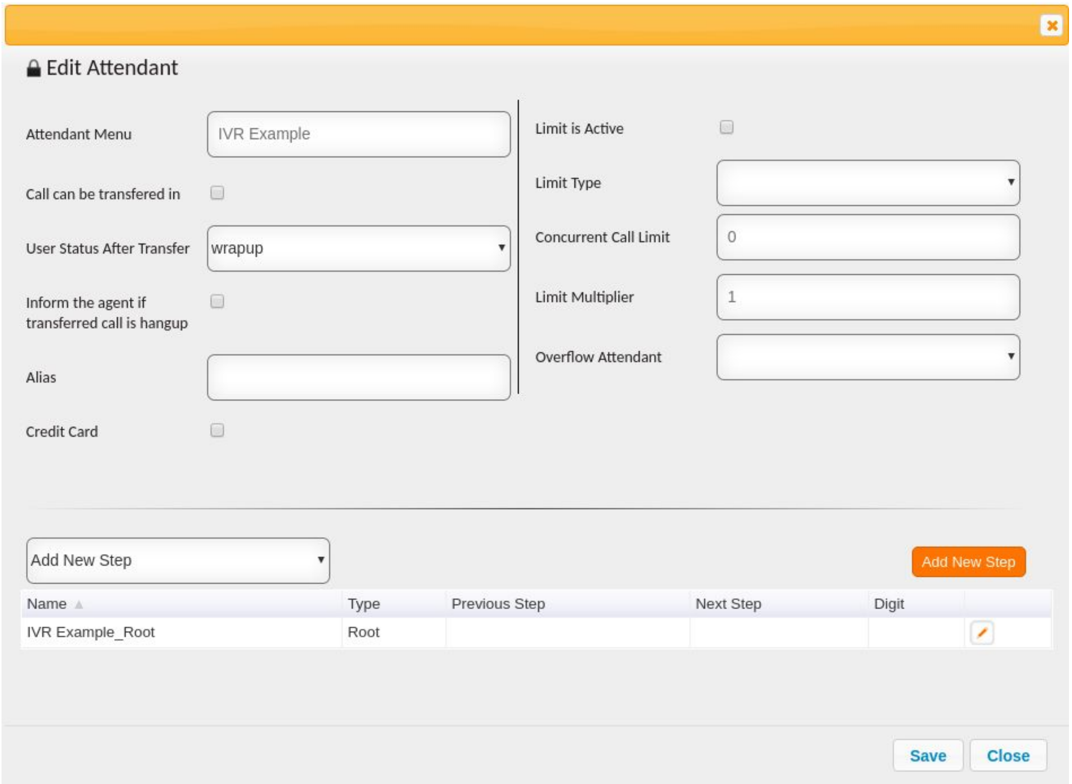


2. Click the Attendant Menu input box, type the desired name of the IVR an example name is shown below:



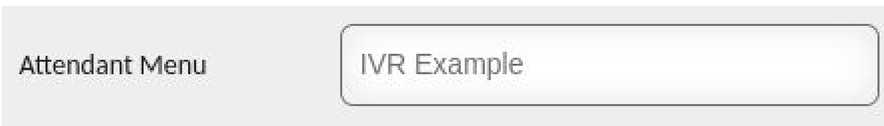
3. Click the save button, 

, the following screen will appear:



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:



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:

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:

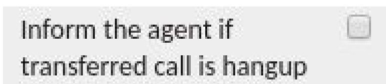
The root step of the IVR tree is displayed in the following format:

"Name assigned to the Attendant"_Root *as shown below:*

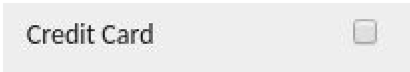
Name	Type	Previous Step	Next Step	Digit	
IVR Example_Root	Root				

4. 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:

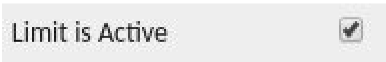
5. If desired, select the "Inform the agent if a transferred call is hangup" checkbox (If this checkbox is selected, it will notify the agent if the customer hung up the call before completing the IVR. For example, if the agent transferred the customer to a satisfaction survey, and the customer hung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



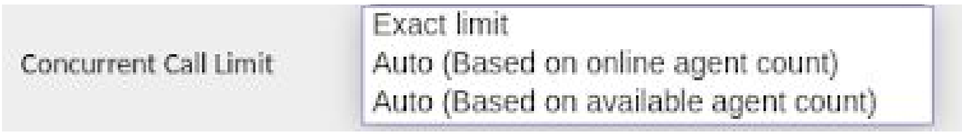
6. If desired, an Alias number can be used for the IVR. (Normally used for IP phones so the agent can transfer to an IVR set up for IP phones, but it can also be used in the tenant, by selecting “Internal Transfer” in the Queues section - See more in the queues section)
7. If desired, the credit card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



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



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)":

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:

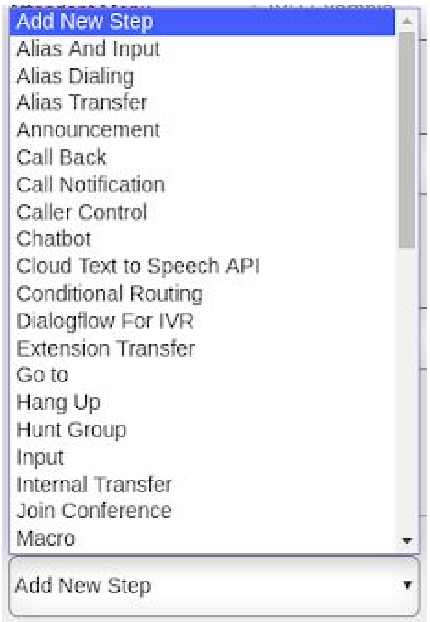
12. If the Limit is Active checkbox is selected, the "Overflow Attendant" input box must be defined. Click the input box a dropdown list of created IVR's will be displayed (If no IVR's are displayed, deselect the "Limit is Active" checkbox, finish following these steps, and create a secondary IVR to 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

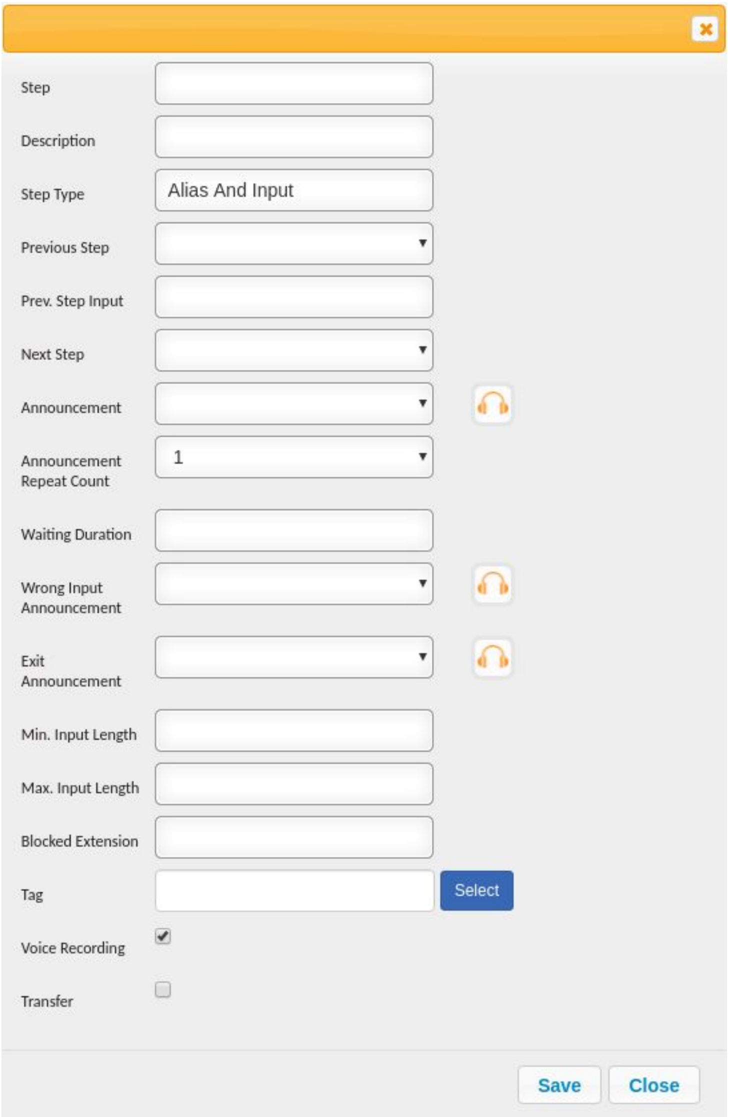
For example, when Alias and İnput are added to IVR, The caller will hear an announcement saying, "dial if you know the extension number.” If the caller wants to talk to Agent 1 specifically, the caller dials 1001, and the call is forwarded to Agent 1.

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:



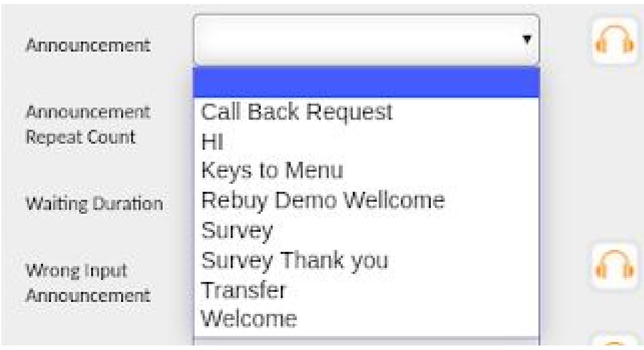
3. Click the "Step" input box, type the desired step name. An example is shown below:

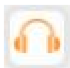
4. If desired in the "Description" input box, type a description for the step.
5. In the "Previous Step" dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

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).

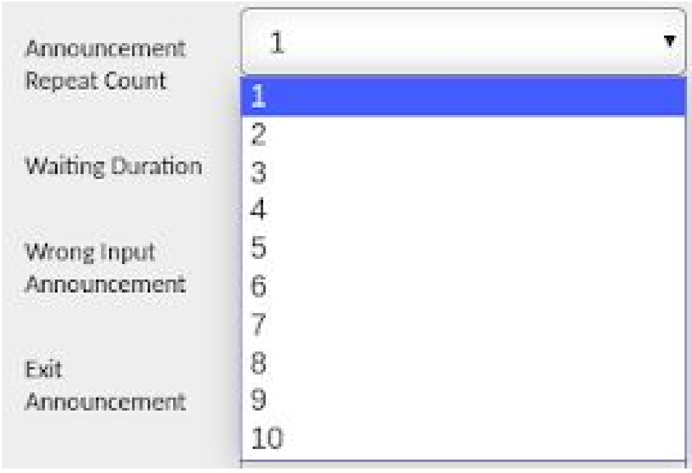
7. In the "Next Step" dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.

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.*

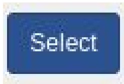
9. Click the "Announcement Repeat Count" input box the following dropdown list will appear:



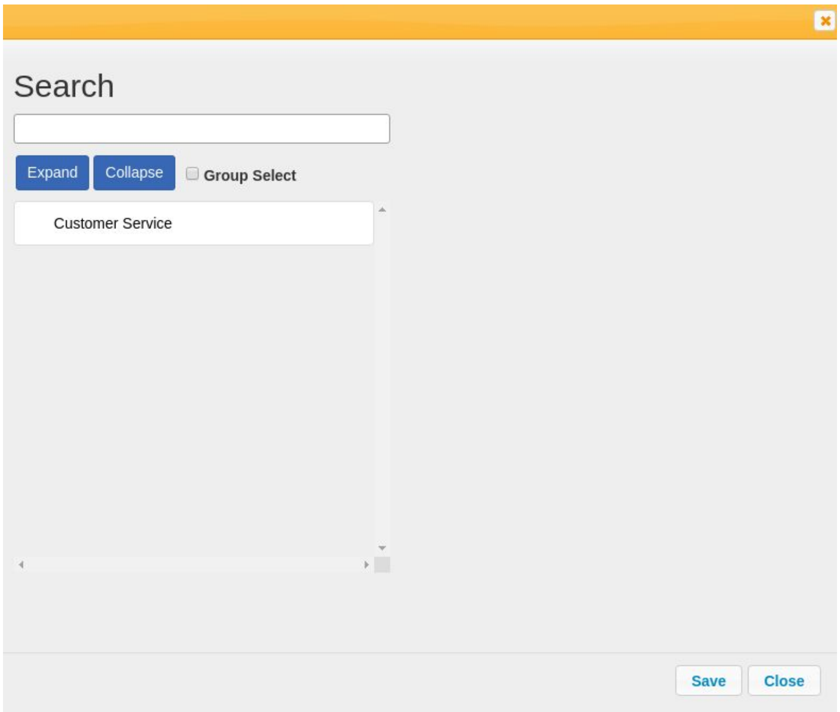
10. Select the desired repeat count.
11. In the "Waiting Duration" input box type the waiting duration for the customer input (Seconds) an example is shown below:

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).

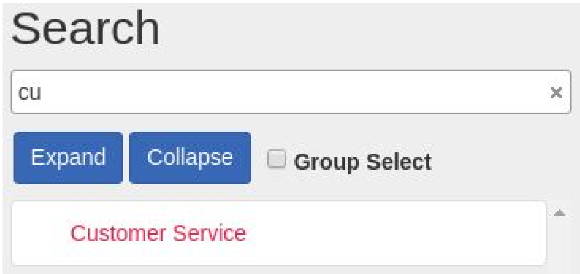
17. If a tag is desired, click the Select button, 

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:

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:



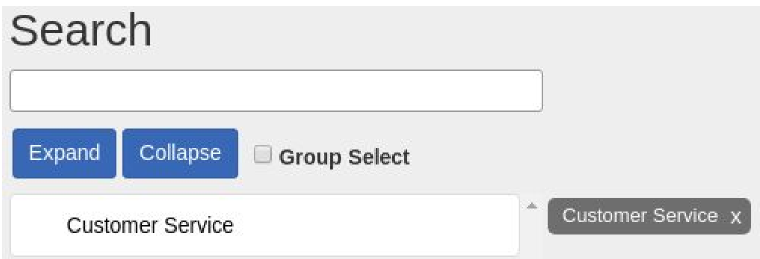
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

Check the Group Select Checkbox, Group Select*, 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,” X*, to the right of the tag name.*

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

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, 

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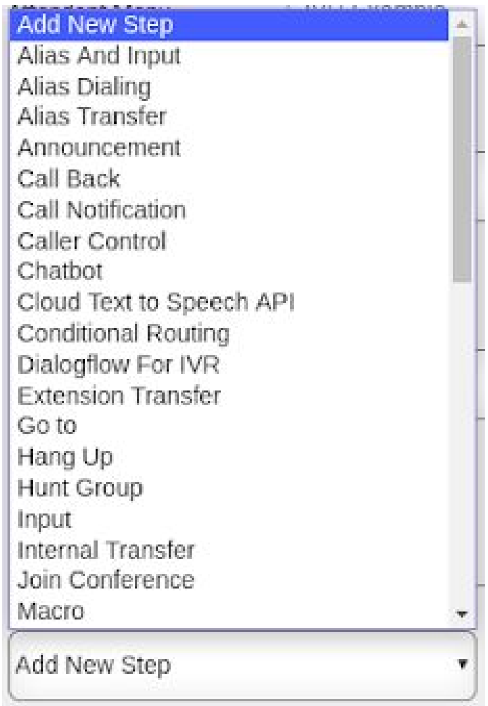
Adding Alias Dialing Step

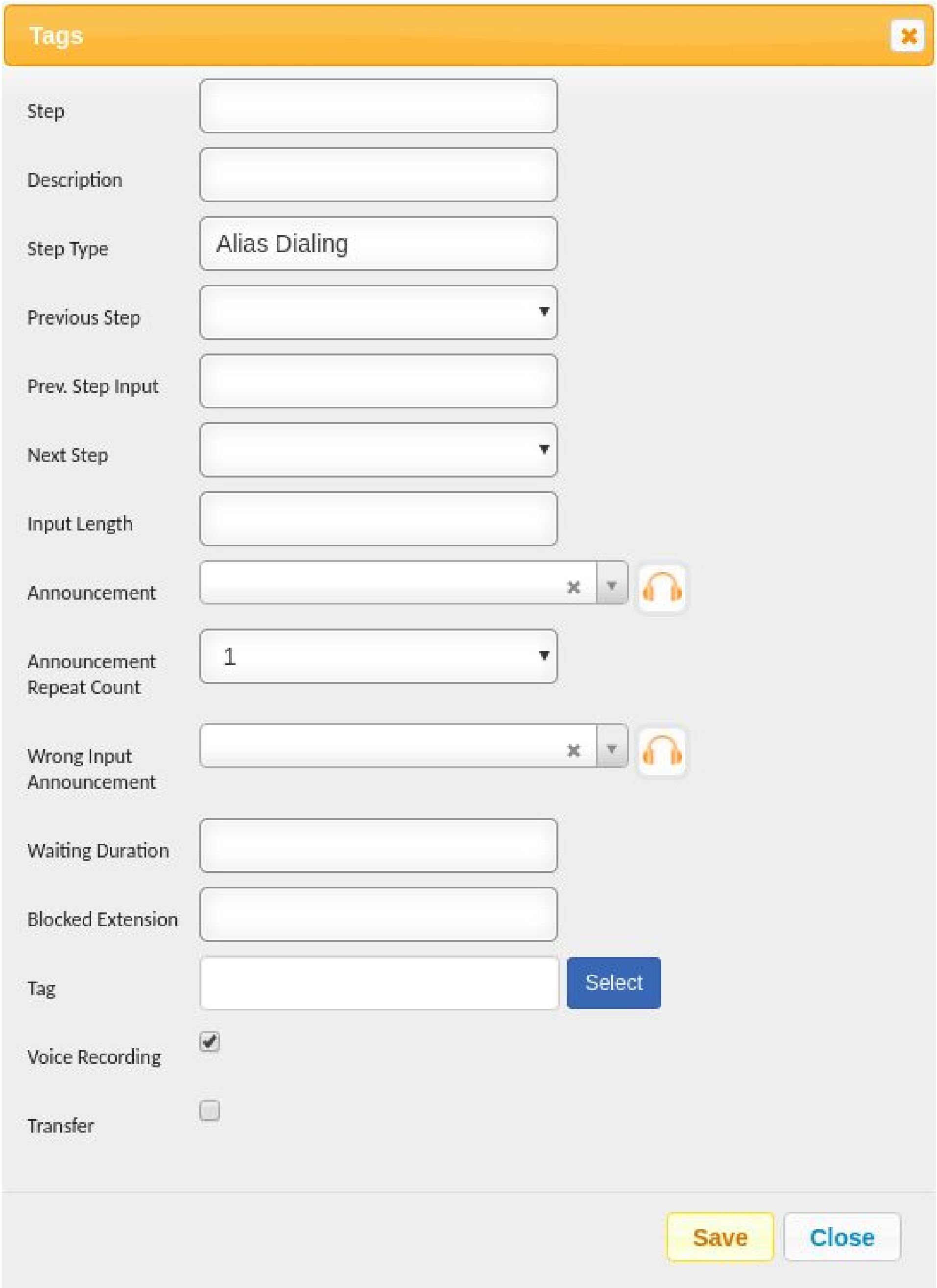
The step is used to transfer the call to the dialed extension number.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

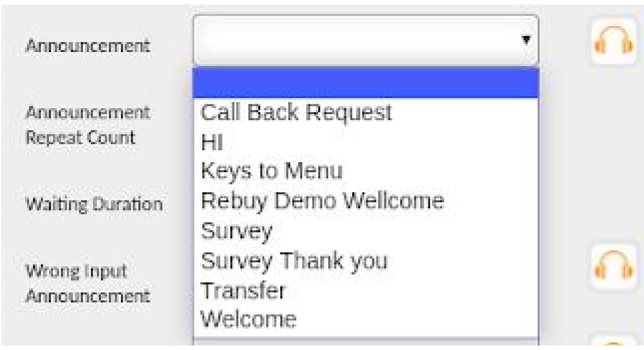


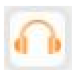
2. Select the “Alias Dialing” step the following pop-up window will appear:



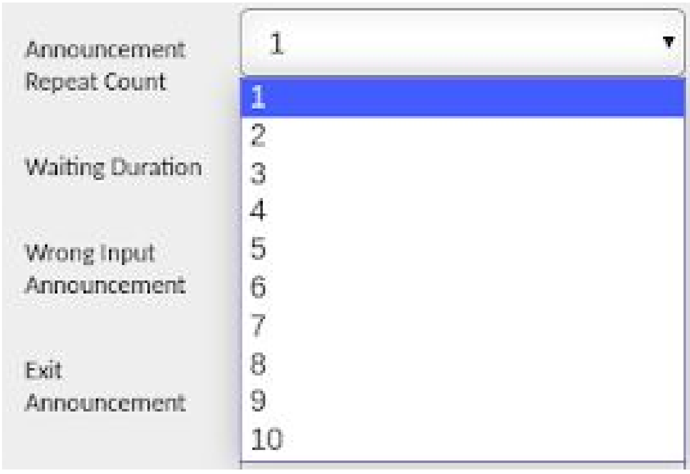
3. Click the “Step” input box, type the desired step name. An example is shown below:

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 "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:

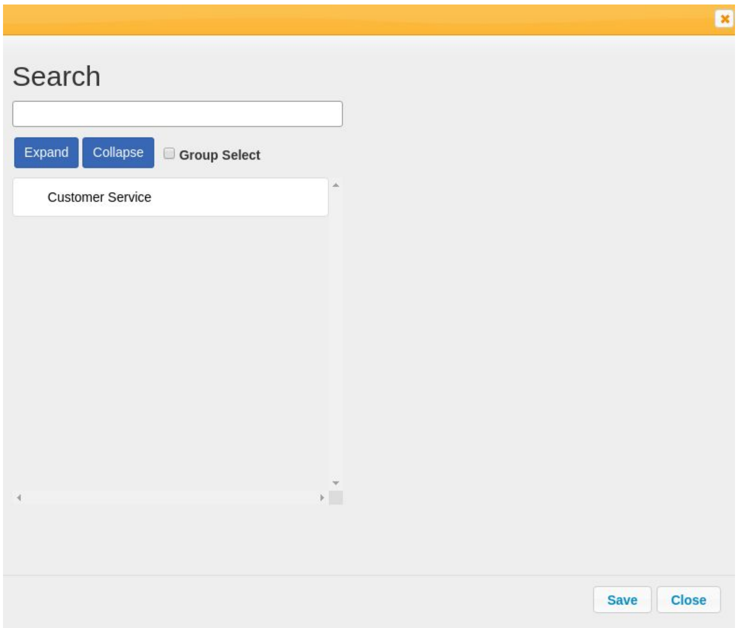


11. Click the "Wrong Input Announcement" input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
12. In the "Waiting Duration" input type the waiting duration for customer input (Seconds) an example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

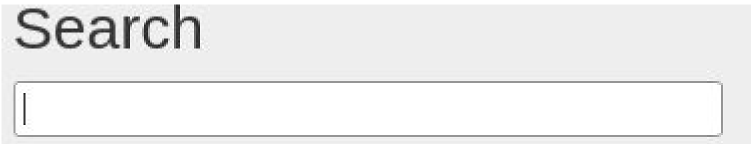
13. Select the "Blocked Extension" input box type the desired blocked extension. It can be inputted to prevent the customer from being transferred to this value (commas can be used to add multiple extensions).

14. If a tag is desired, click the Select button, 

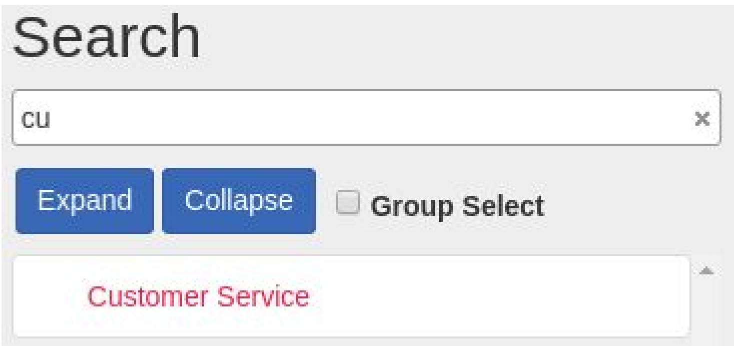
to the right of the "Tag" input box, the following pop-up window will appear:



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:



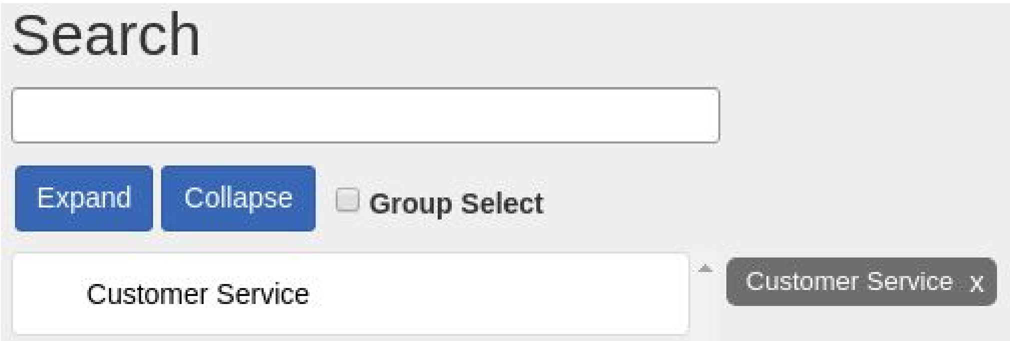
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

Check the Group Select Checkbox, Group Select *, 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," x*, to the right of the tag name.*

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

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, 

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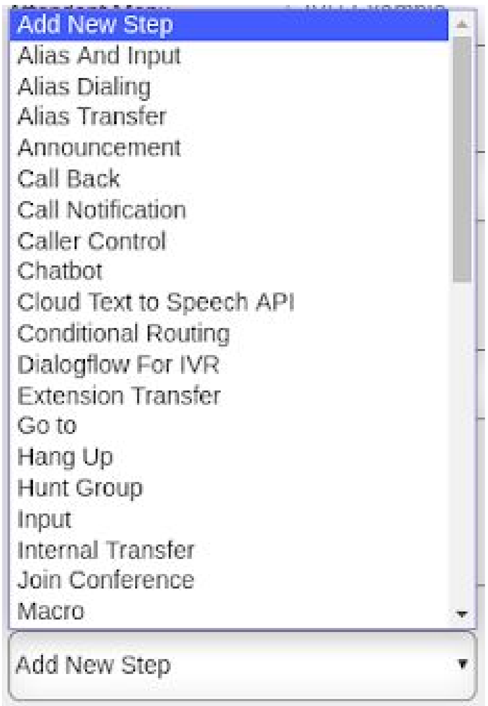
Adding Alias Transfer Step

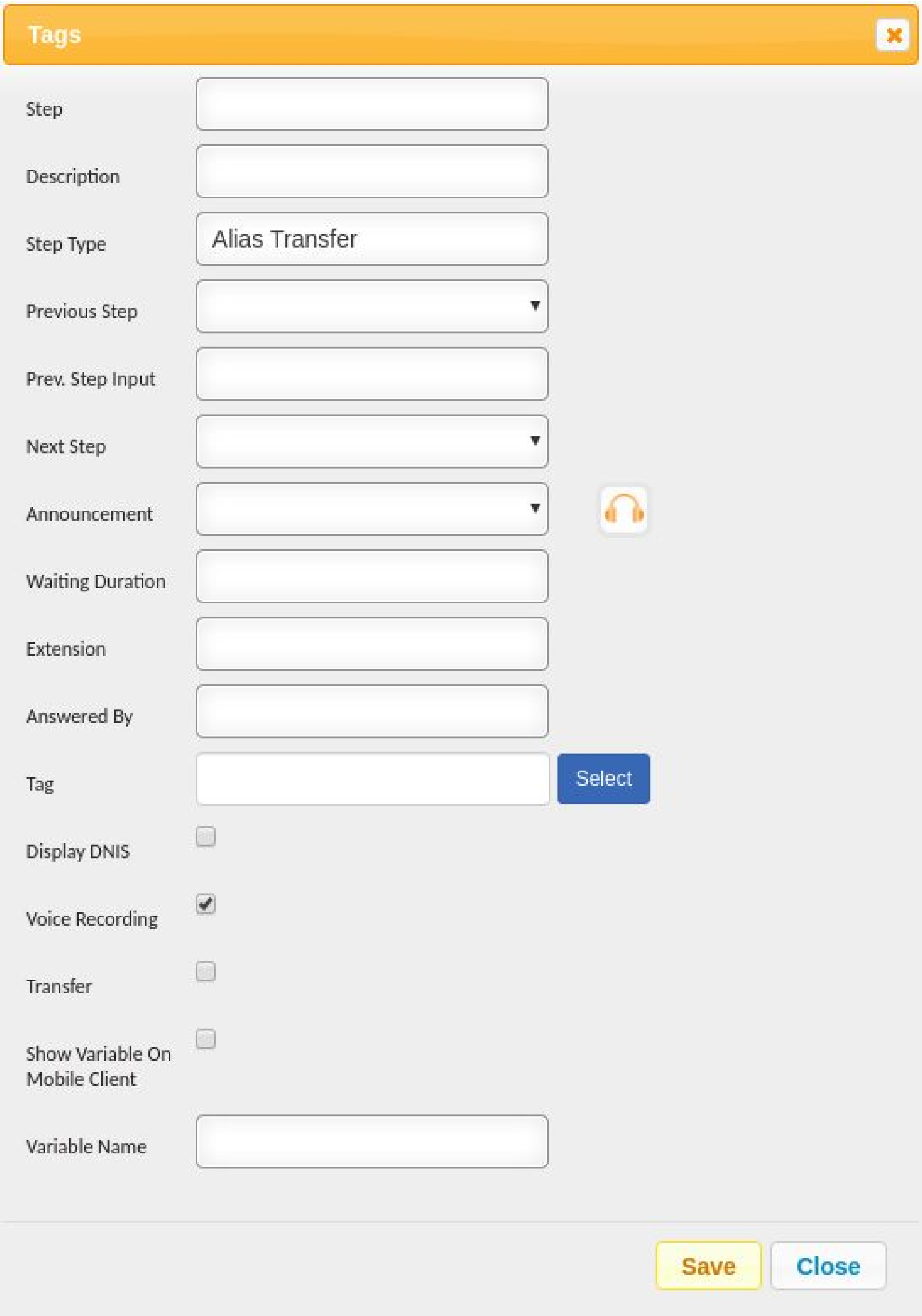
The step used to transfer the call to the designated IP phone.

1. Click the “Add New Step” dropdown box, 

, the following list will appear:

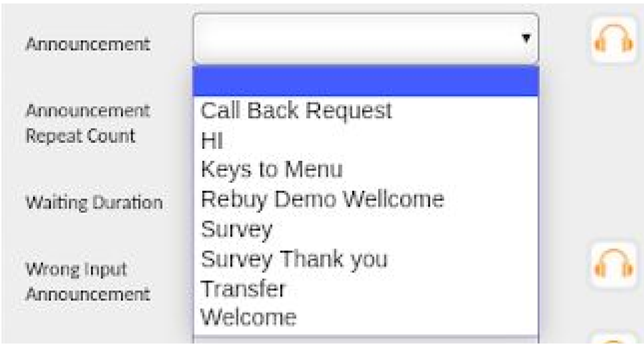


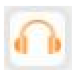
2. Select the "Alias Transfer" step the following pop-up window will appear:



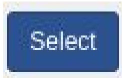
3. Click the "Step" input box, type the desired step name. An example is shown below:

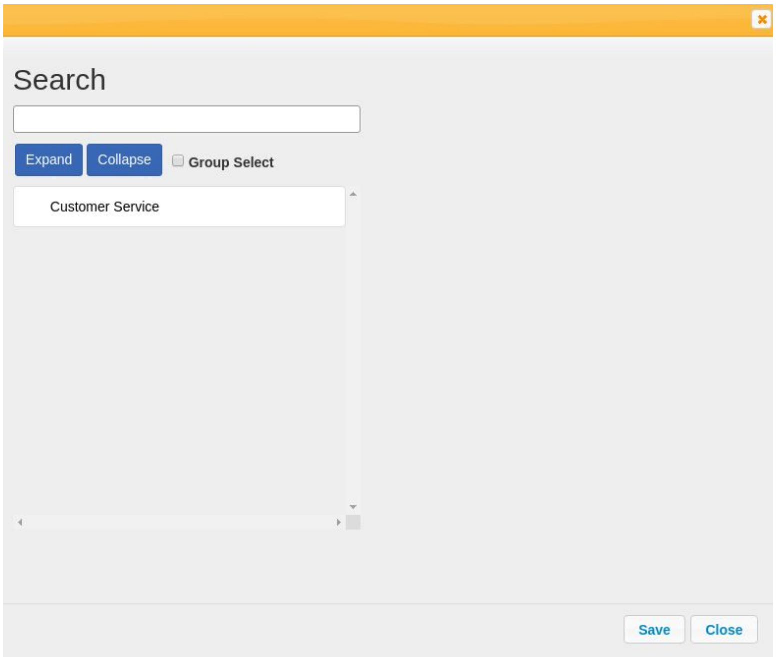
4. If desired in the "Description" input box, type a description for the step.
5. In the "Previous Step" dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the "Previous Step Input" input box, type a desired previous step input (Only 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.*

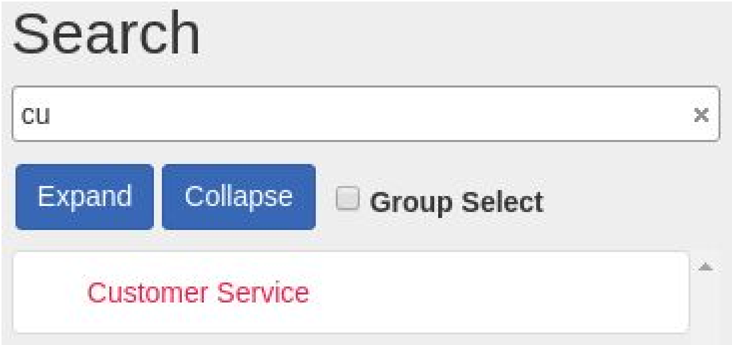
9. In the "Waiting Duration" input type the waiting duration for the customer input (Seconds) an example is shown below:

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:



13. 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:



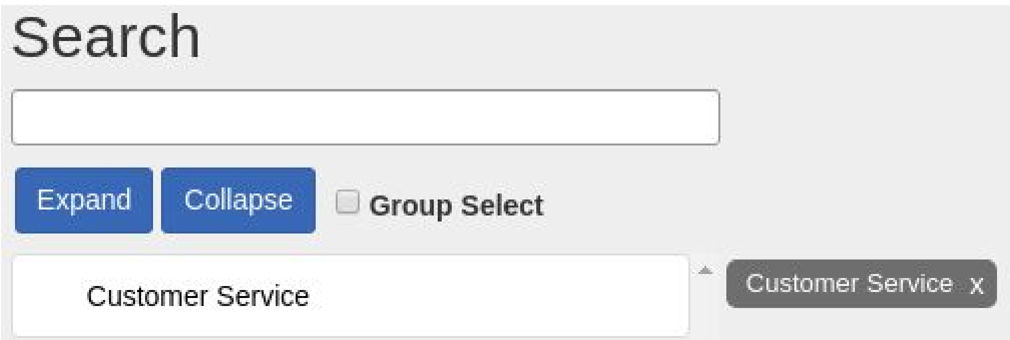
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

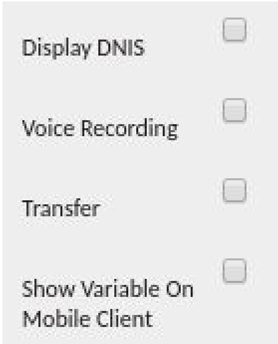
Check the Group Select Checkbox, Group Select *, to group select tags.*

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," x*, to the right of the tag name*

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



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, 

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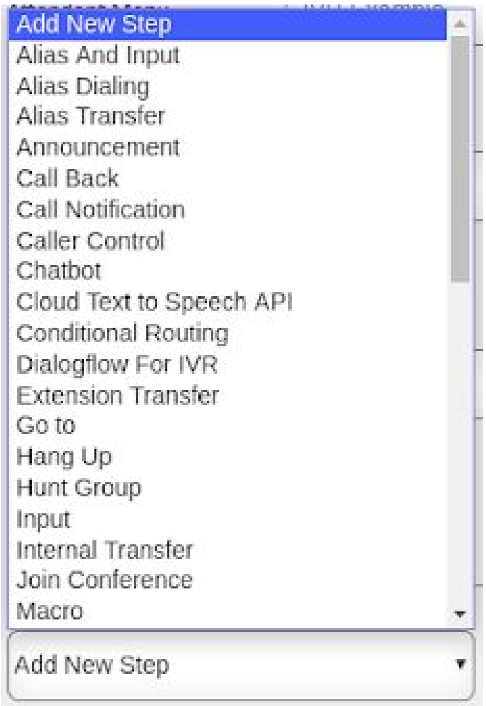
Adding Announcement Step

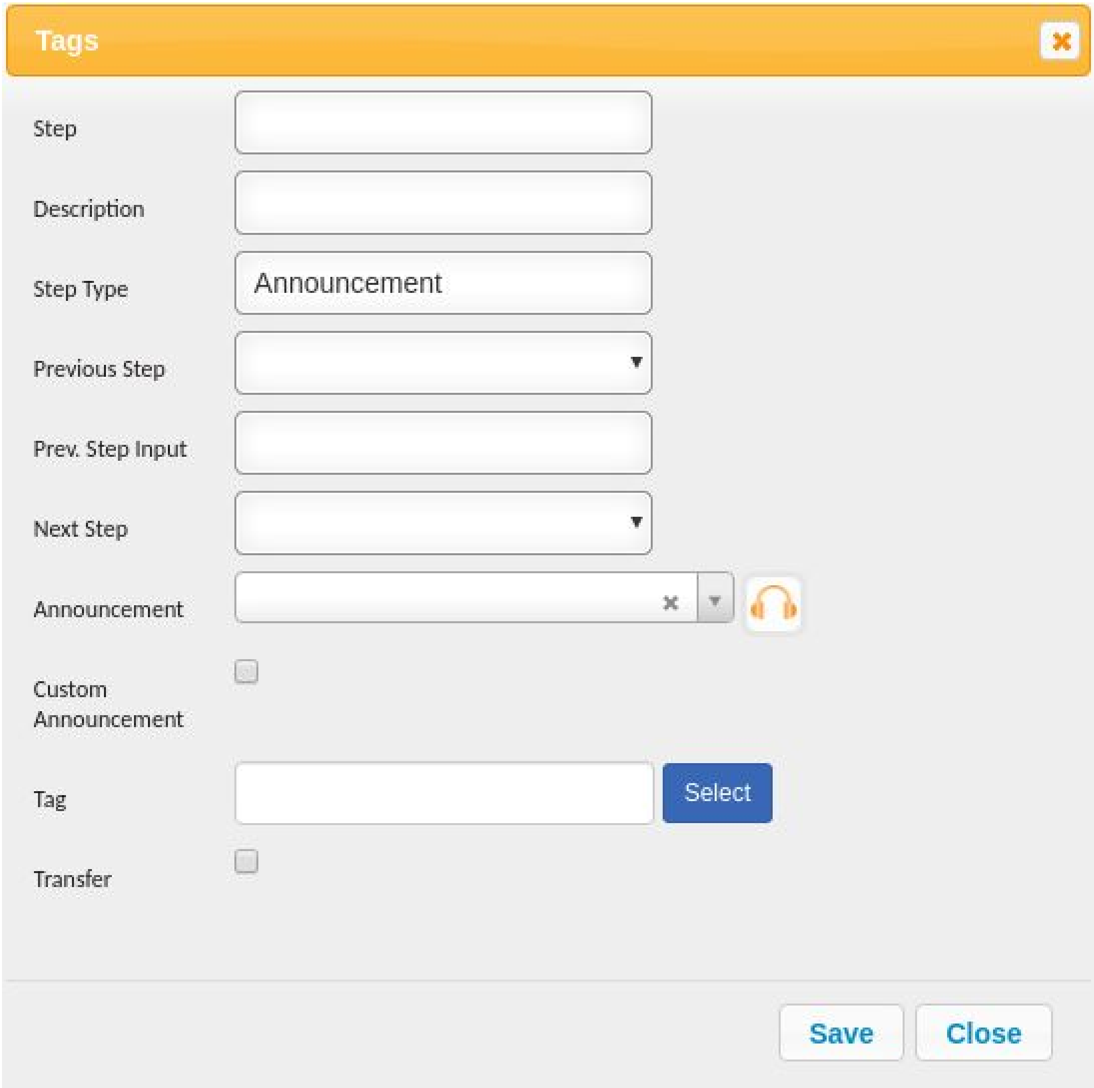
The specified entrance announcement (Welcome to XX Company) can be added using this IVR step.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:



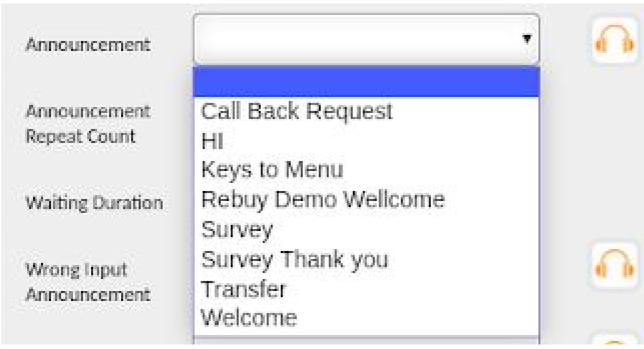
2. Select the "Announcement" step the following pop-up window will appear:

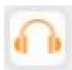


3. Click the "Step" input box, type the desired step name. An example is shown below:

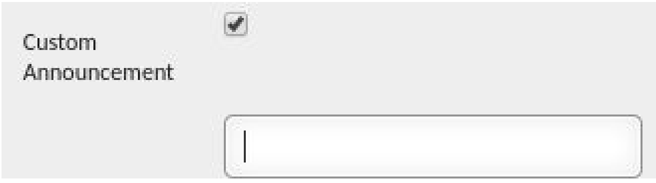
4. If desired in the "Description" input box, type a description for the step.
5. In the "Previous Step" dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

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:

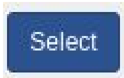


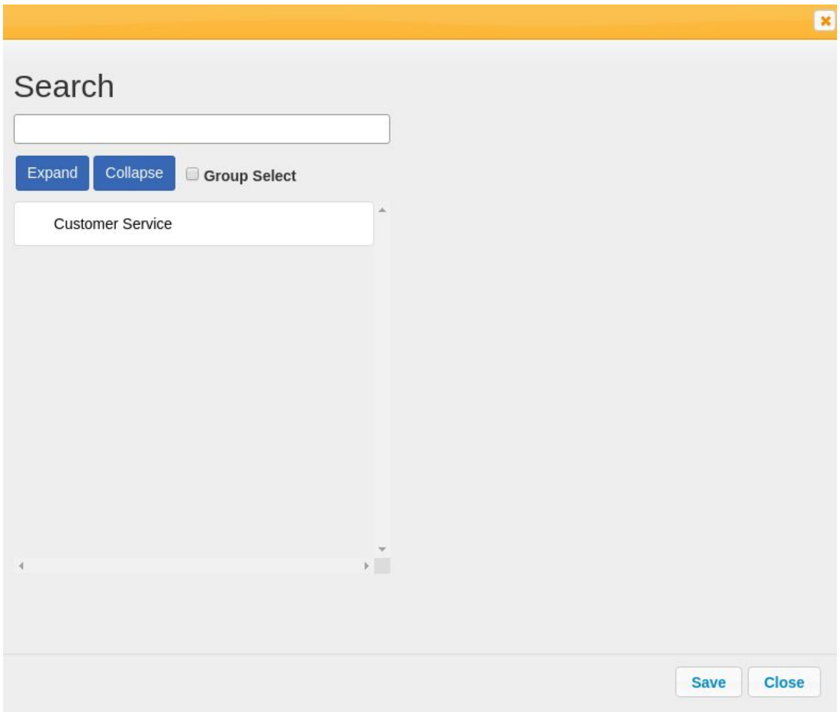
Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

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:

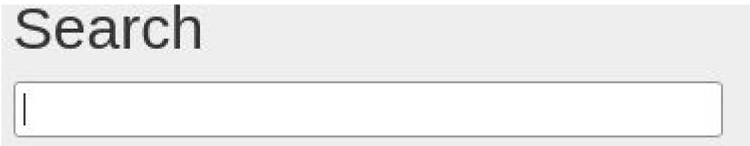


10. In the input box, type the custom announcement name.

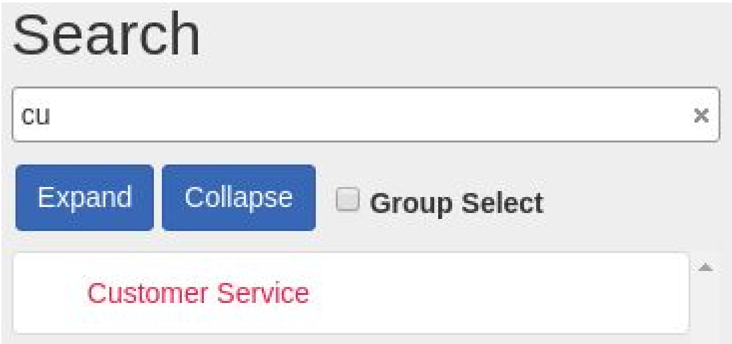
11. If a tag is desired, click the Select button,  to the right of the "Tag" input box, the following pop-up window will appear:



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:



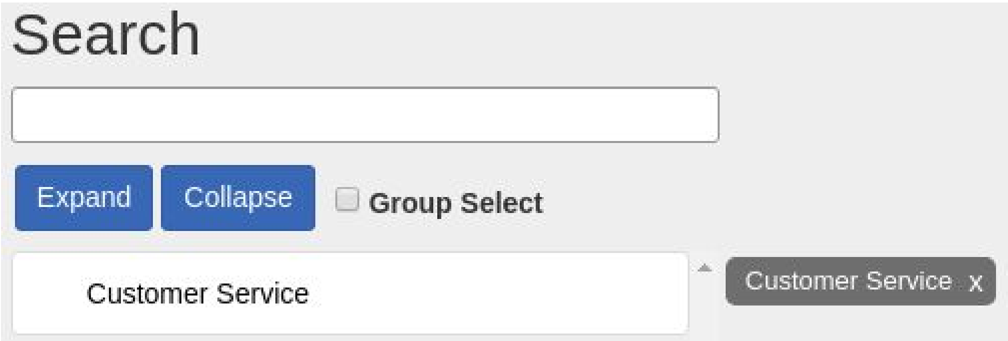
Note:

Press the Expand button,  *, to expand the selection*

Press the Collapse button,  *, to collapse the selection*

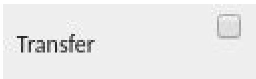
Check the Group Select Checkbox,  *, to group select tags.*

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:



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:



The description of the checkbox is explained below:

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

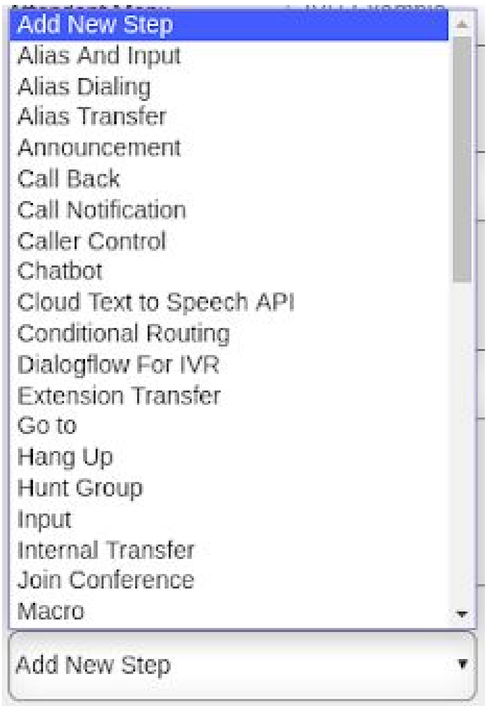
14. Click the save button, .

Adding Call Back Step

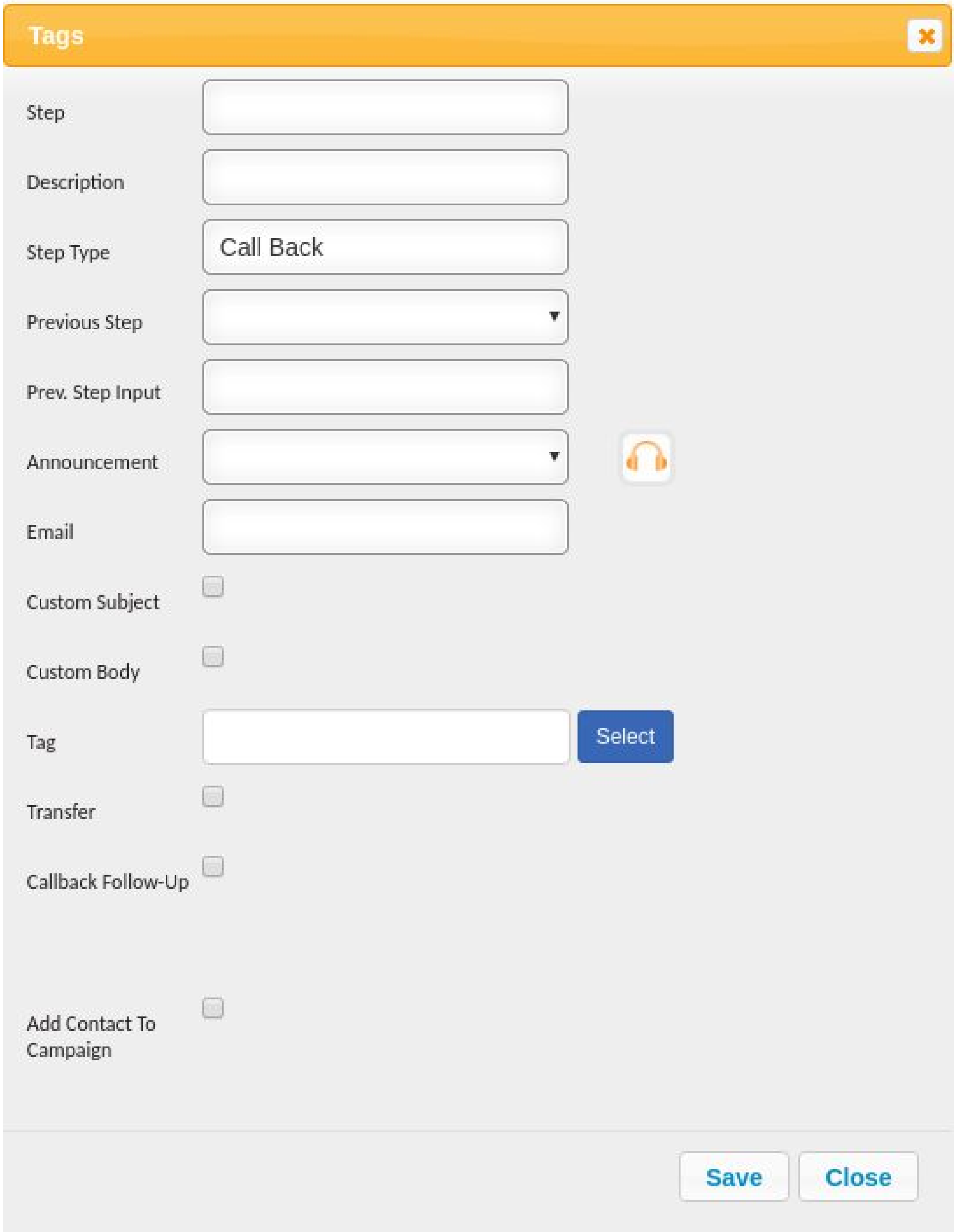
The step used to make a notification of missed calls by email.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

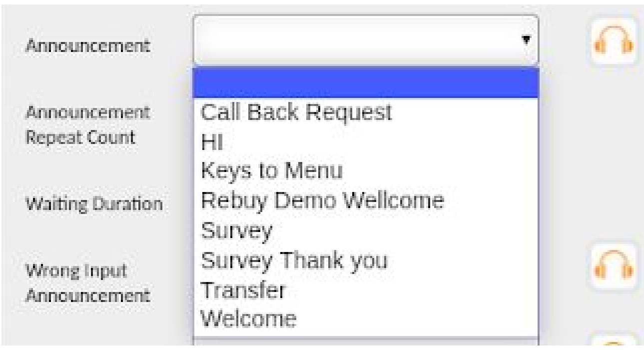


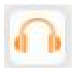
2. Select the "Call Back" step the following pop-up window will appear:



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. 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:

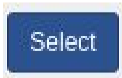


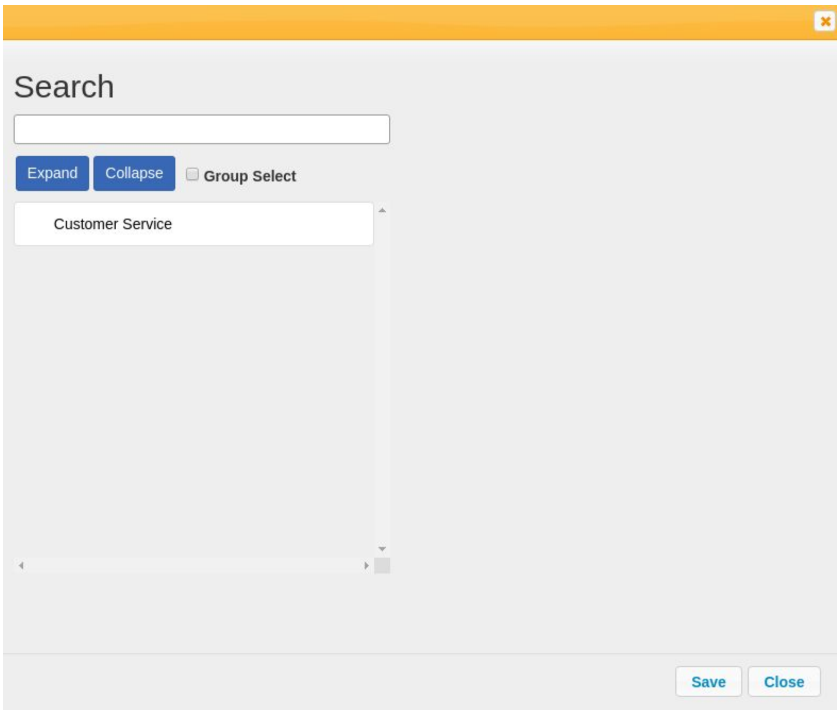
Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

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.)

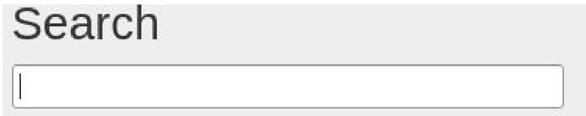
9. If desired, the "Custom Subject" checkbox can be checked. If checked, a custom email subject line can be created using the input box that appears:

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:

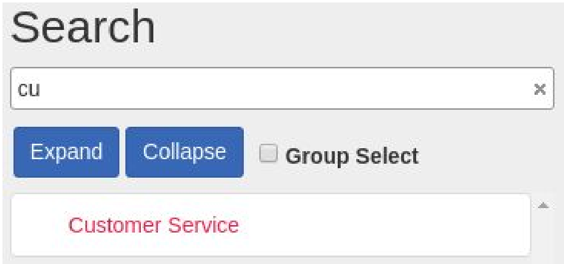
11. If a tag is desired, click the Select button,  to the right of the "Tag" input box, the following pop-up window will appear:



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:



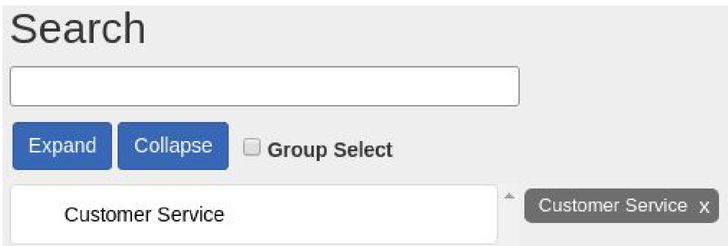
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

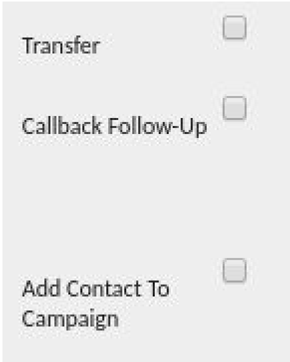
Check the Group Select Checkbox, Group Select *, to group select tags.*

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," x*, to the right of the tag name.*

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



The descriptions of these checkboxes are explained below:

Transfer	Used by the Call Center Studio Development Team (Do not check)
Callback Follow-up	When checked, the following will be displayed:  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.

Add Contact to Campaign	When checked, the following will be displayed:  Click the “Target Campaign” dropdown menu to select the desired campaign. Click the “Target List Name” type the desired list name. Click the “Add after X minutes” type the desired time after calling to add the caller to the Target Campaign.

14. Click the save button, 

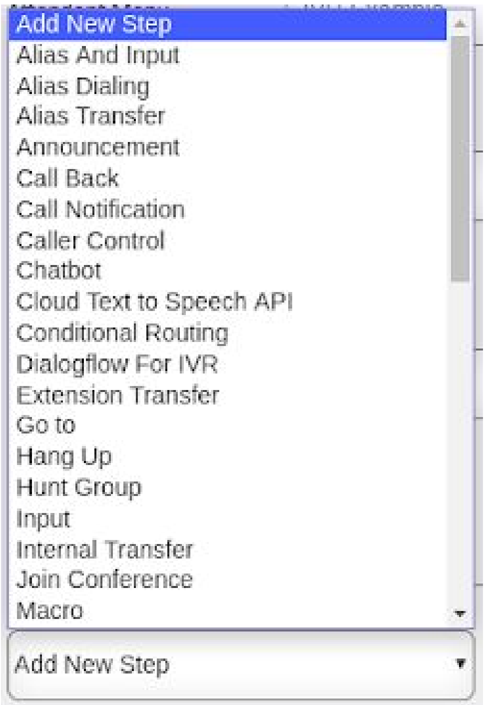
.

Adding Call Notification Step

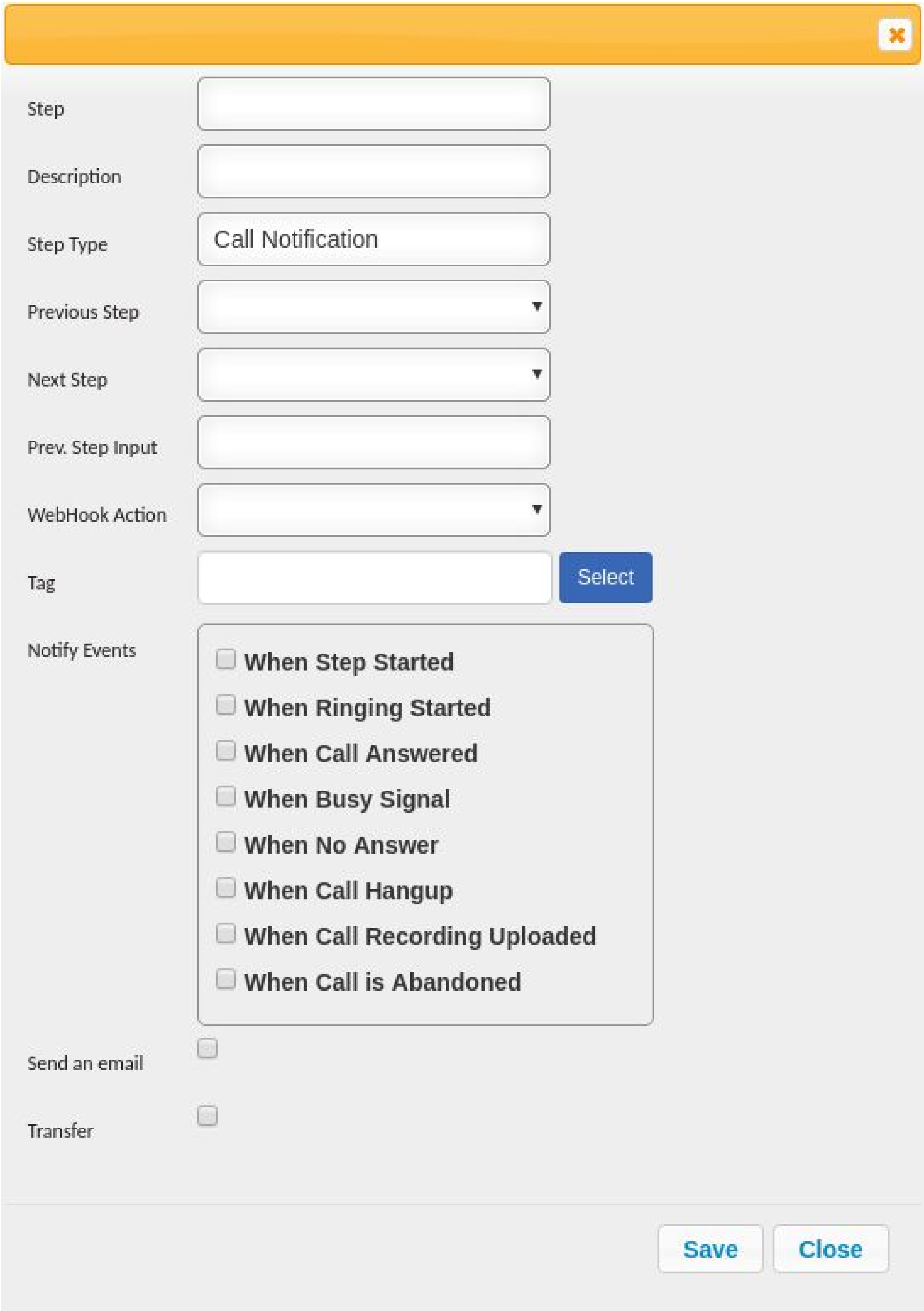
The step where the web service, prepared by the customer and defined by Webhook, is triggered based on the call status, according to the notification events selected for users using IP telephony.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

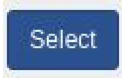


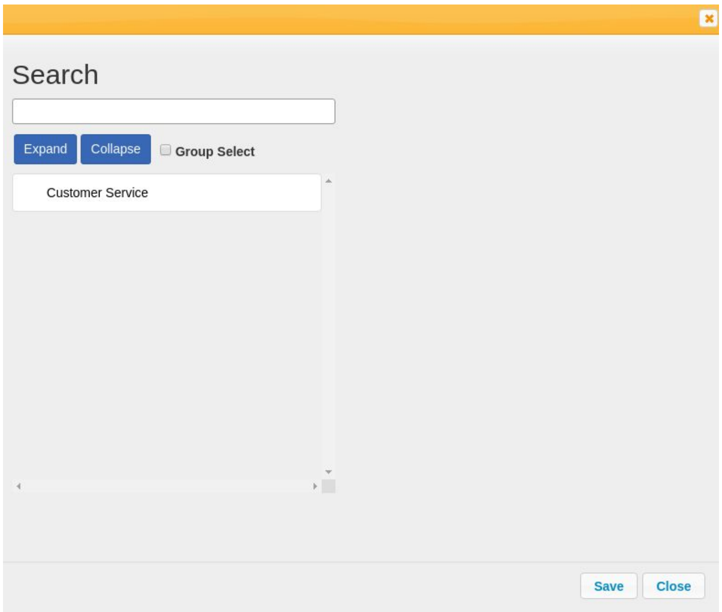
2. Select the “Call Notification” step the following pop-up window will appear:



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

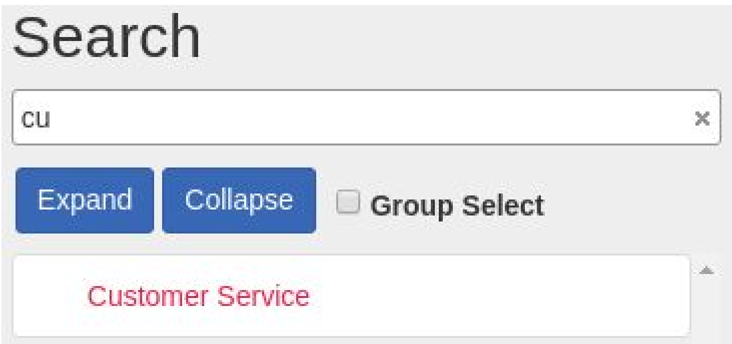
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. In the “Next Step” dropdown menu, select the desired next step. It is recommended to link all steps after setting up the IVR.
7. 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).
8. 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:



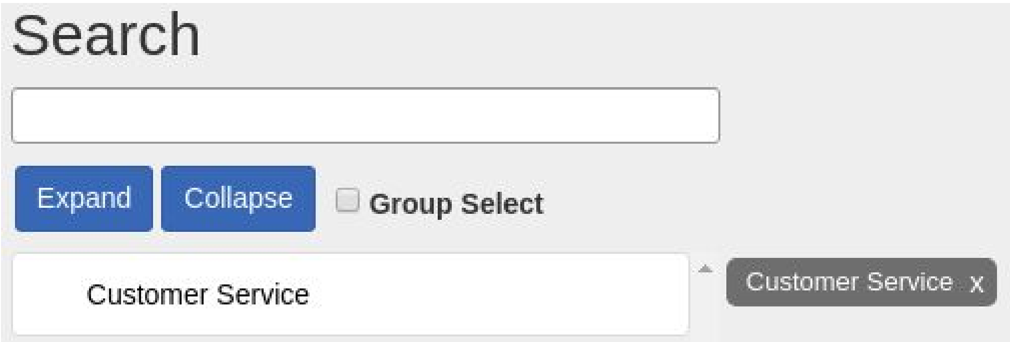
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

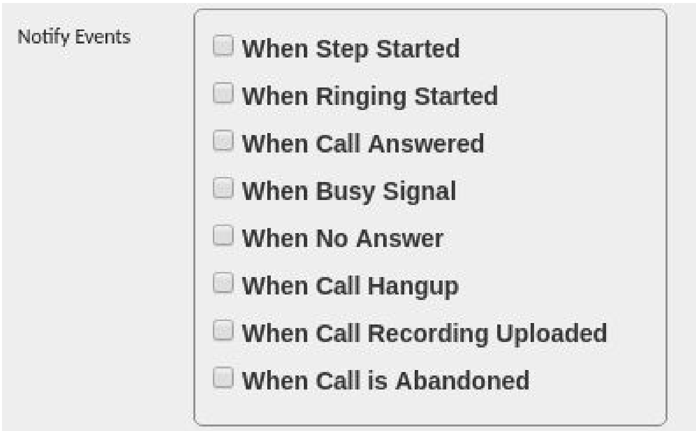
Check the Group Select Checkbox, Group Select *, to group select tags.*

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:

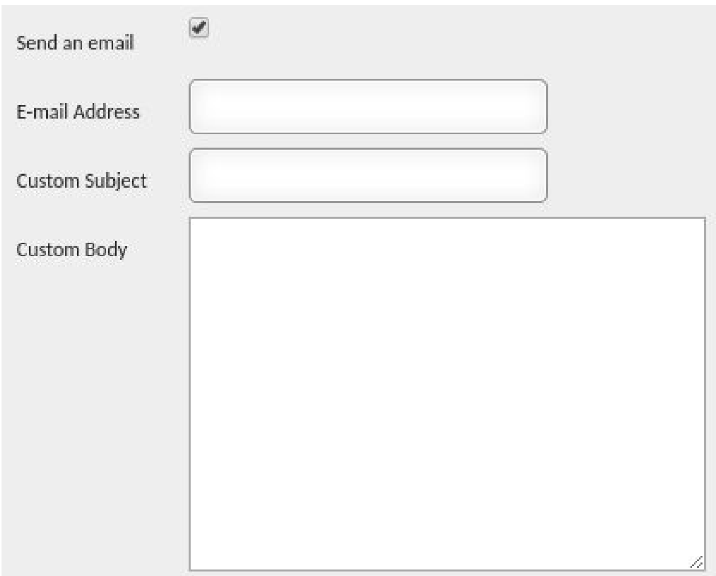


Note: To delete a Tag from the selection simply click the "X," x*, to the right of the tag name*

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).



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:

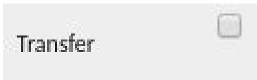


13. In the “Email Address,” input box type the desired email addresses.

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, 

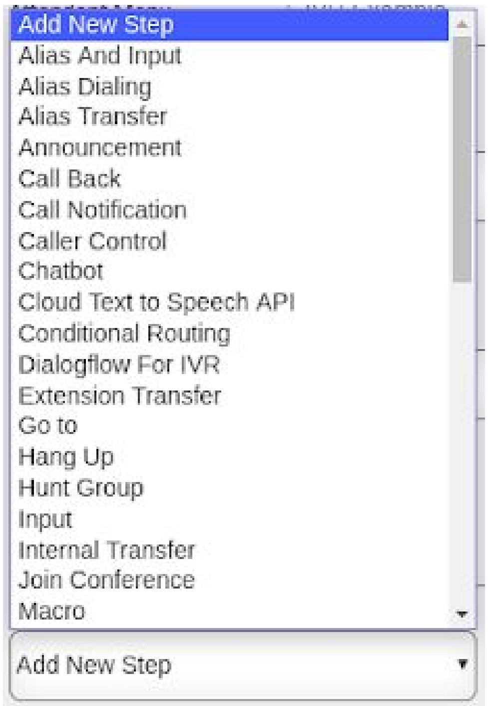
.

Adding Hang Up Step

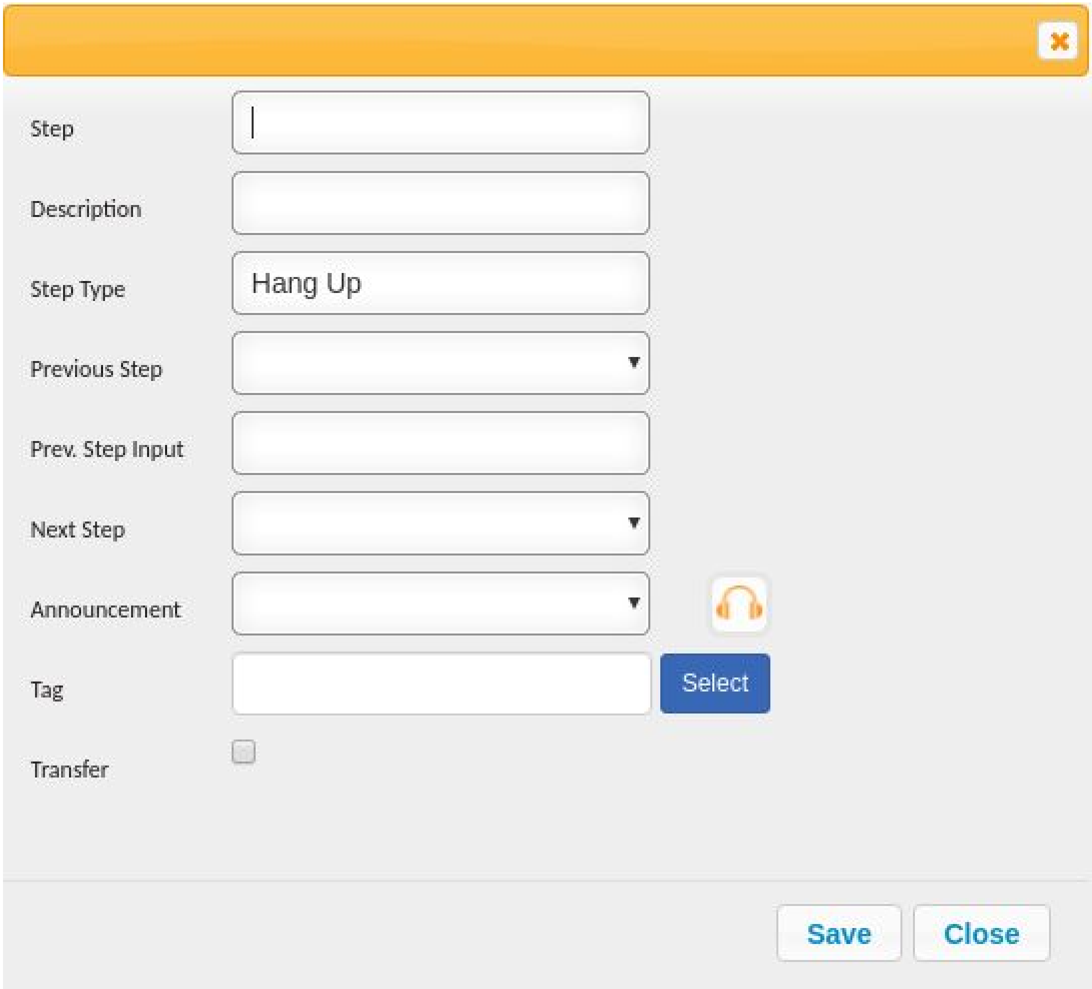
The step is used to disconnect the call.

1. Click the “Add New Step” dropdown box, 

, the following list will appear:



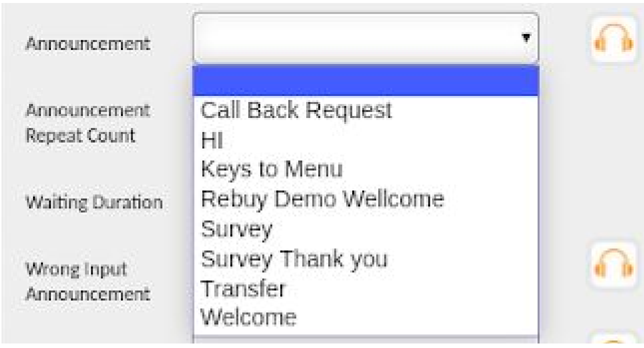
2. Select the “Hang up” step the following pop-up window will appear:

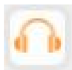


3. Click the “Step” input box, type the desired step name. An example is shown below:

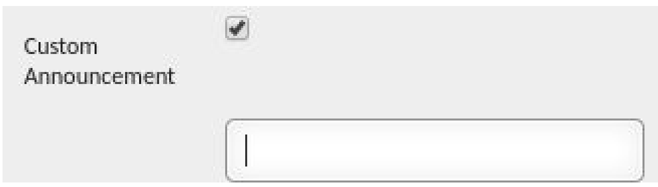
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only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

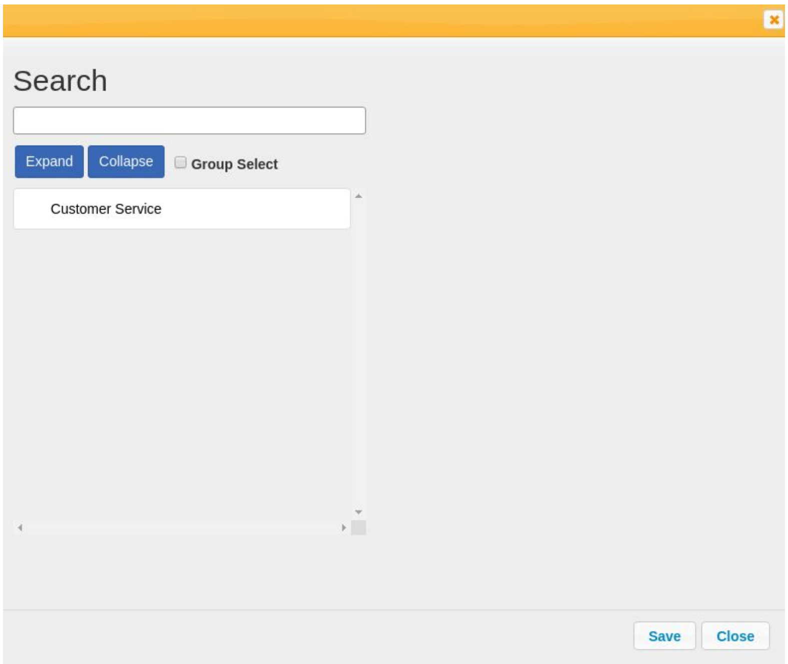
9. If desired, a Custom Announcement name can be created by checking the “Custom Announcement” checkbox. The following input box will appear:



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

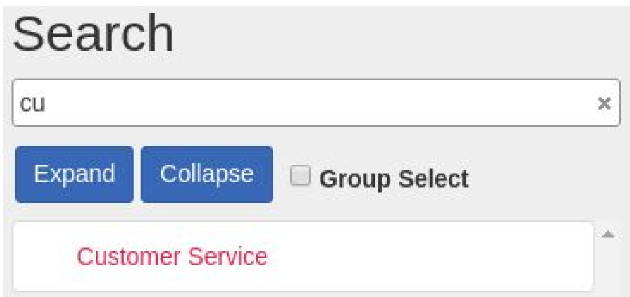
11. If a tag is desired, click the Select button, 

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:



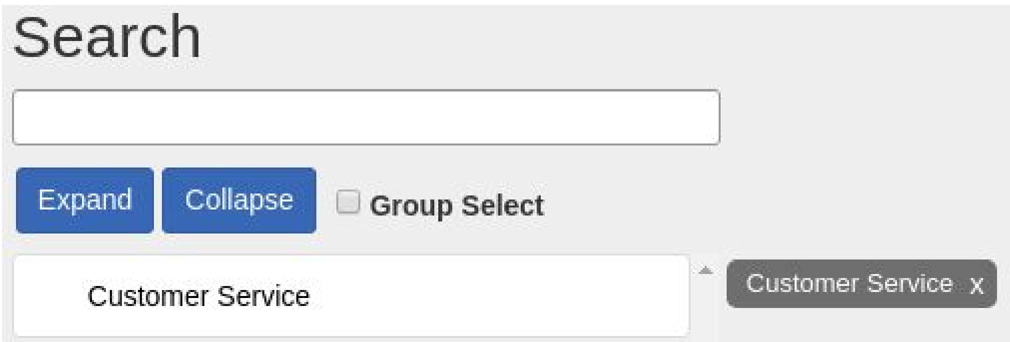
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

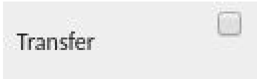
Check the Group Select Checkbox, Group Select *, to group select tags.*

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," x*, to the right of the tag name.*

13. 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)

14. Click the save button, 

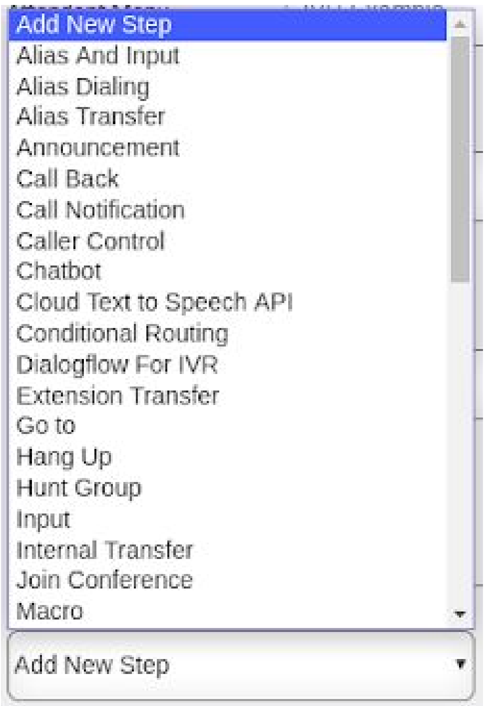
.

<u>Adding Input Step</u>

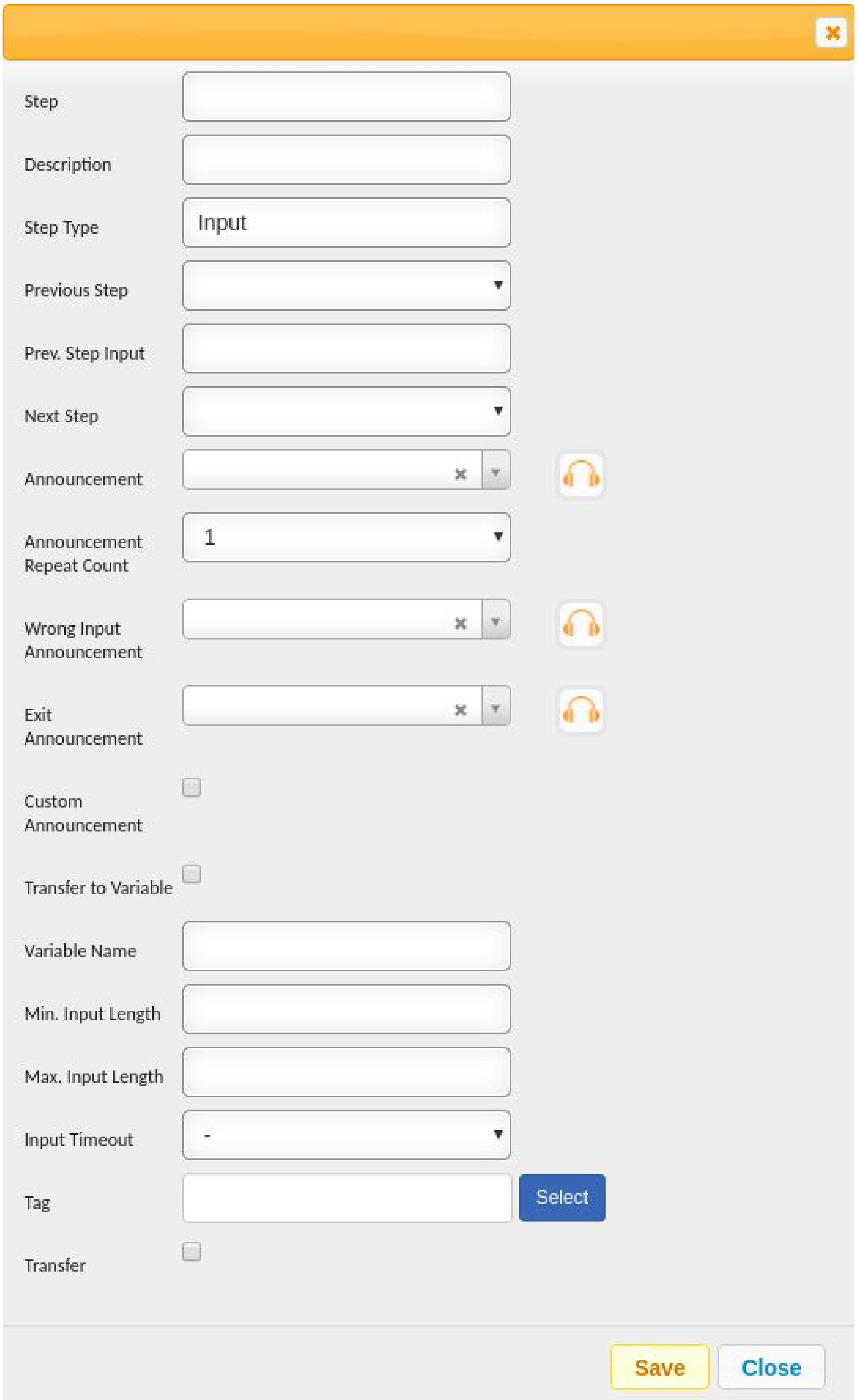
The step is used to create an input step for the caller based on an announcement.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

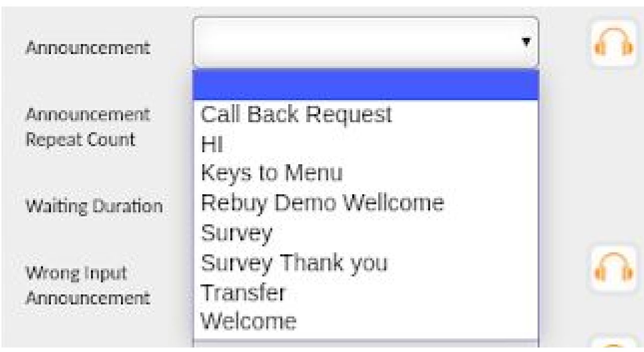


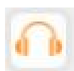
2. Select the “Input” step the following pop-up window will appear:



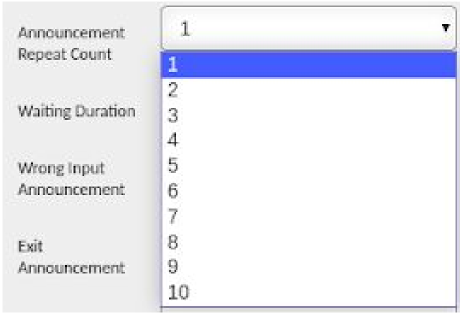
3. Click the “Step” input box, type the desired step name. An example is shown below:

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:

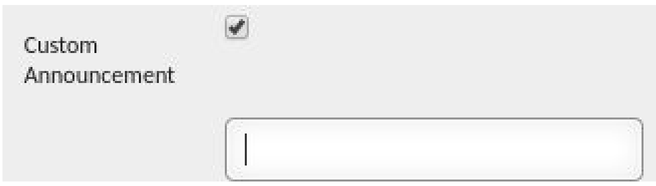


Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

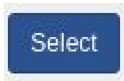
9. Click the “Announcement Repeat Count” input box the following dropdown list will appear:



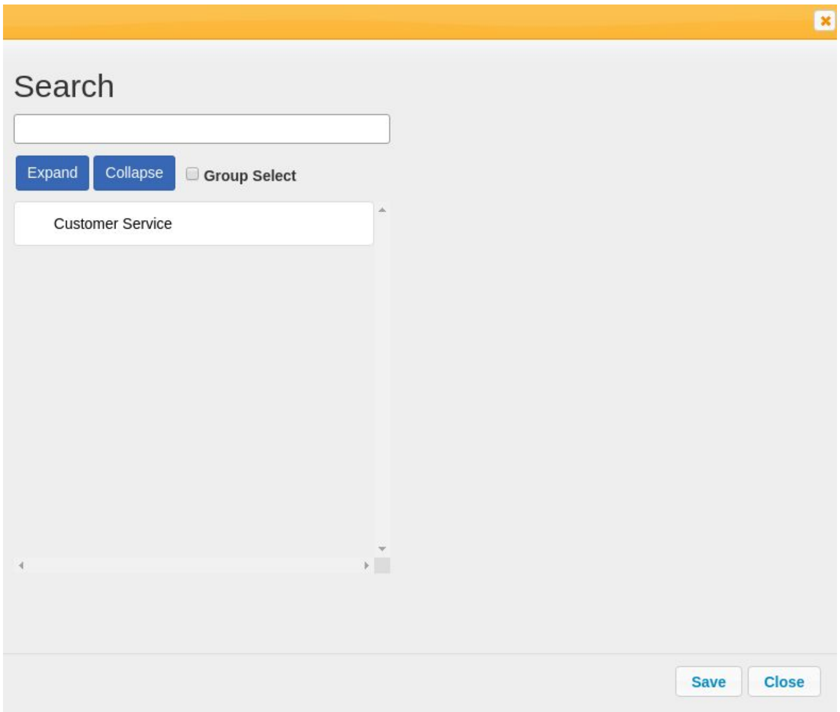
10. Select the desired repeat count.
11. Click the “Wrong Input Announcement” input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.
12. Click the “Exit Announcement” input box. A dropdown menu will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



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).

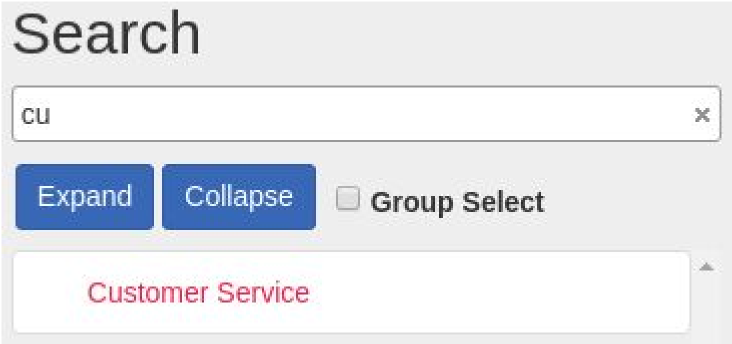
17. Click the “Min. Input Length” input box type the minimum input length, always “1.”
18. Click the “Max. Input Length” input box type the maximum input length for the customer to select. For example, if the Alias’s range between 3 digits and 4 digits, the max input length will be 4.
19. In the “Input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



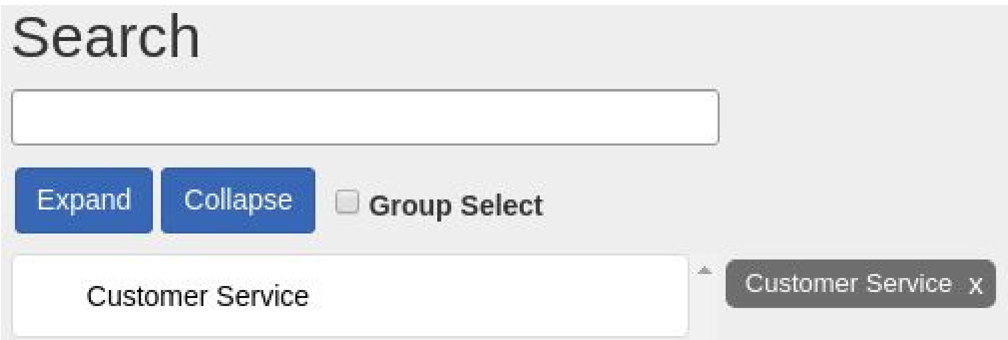
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

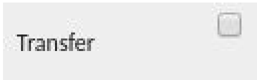
Check the Group Select Checkbox, Group Select *, to group select tags.*

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," x*, to the right of the tag name.*

22. 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)

23. Click the save button, 

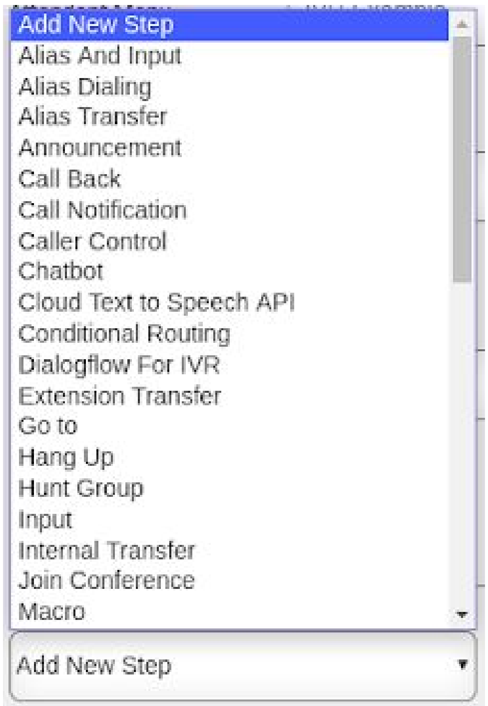
.

Adding Conditional Routing Step

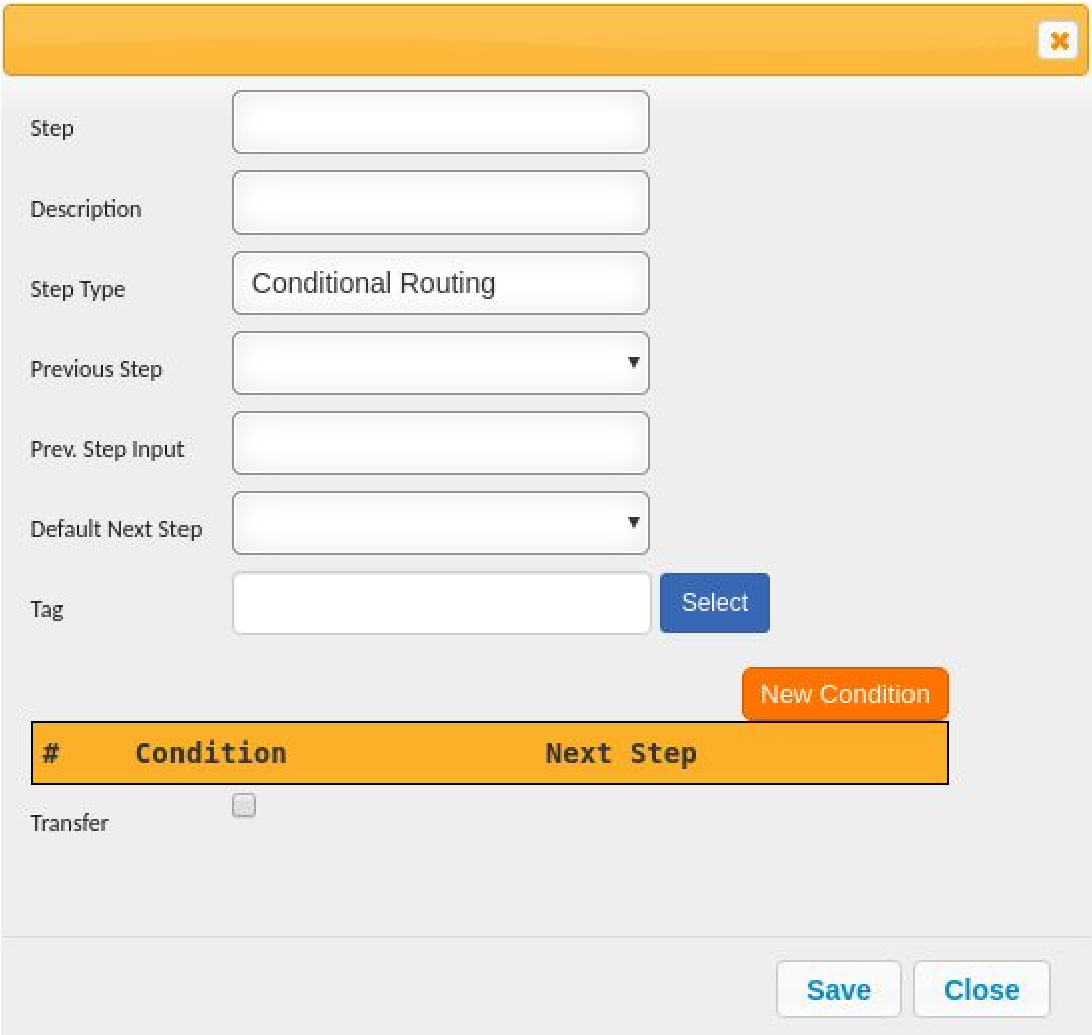
Enables the call to be sent to a specific step of IVR according to the response returned from the variable or standard responses returned from the web service prepared by the user of the tenant (e.g., Cancellation, Preparing Order, In Cargo).

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

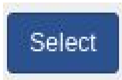


2. Select the "Conditional Routing" step the following pop-up window will appear:

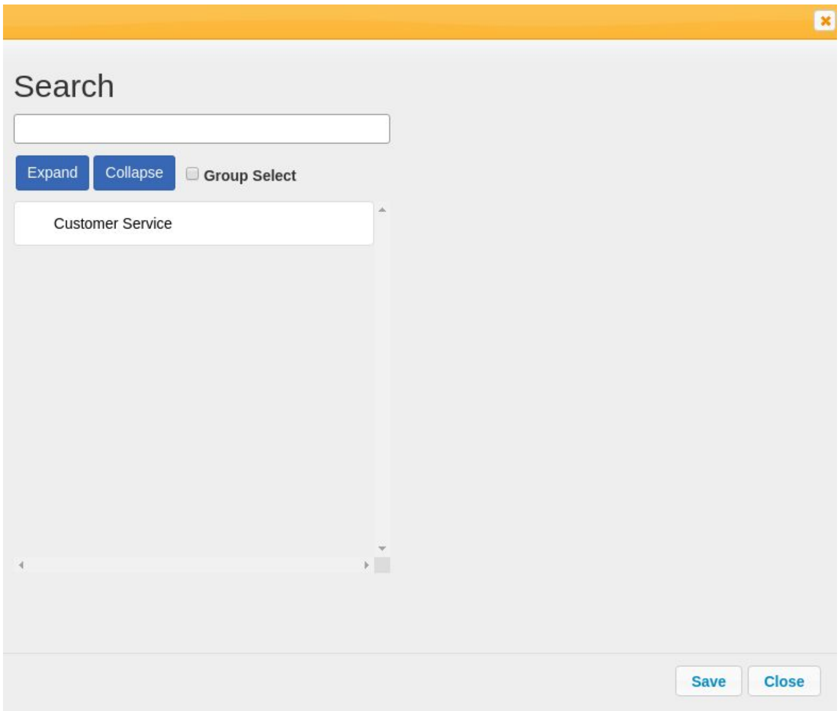


3. Click the "Step" input box, type the desired step name. An example is shown below:

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.

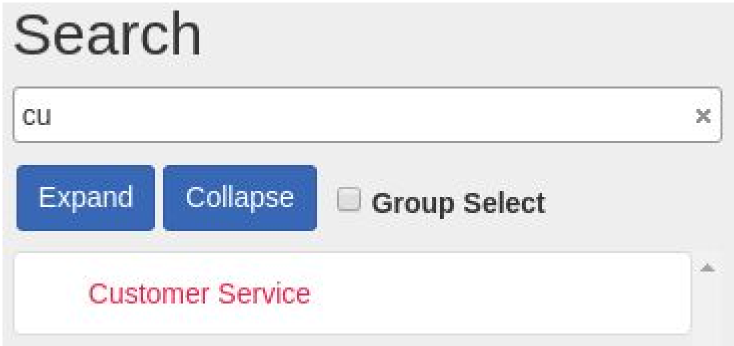
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Default Next Step” dropdown menu, 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:



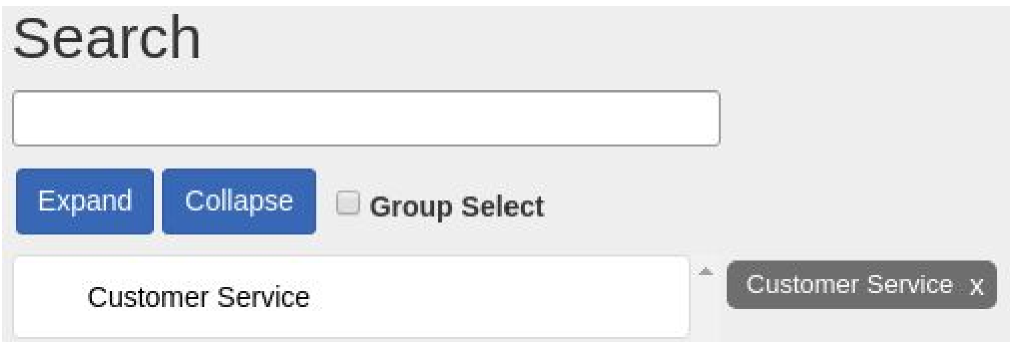
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

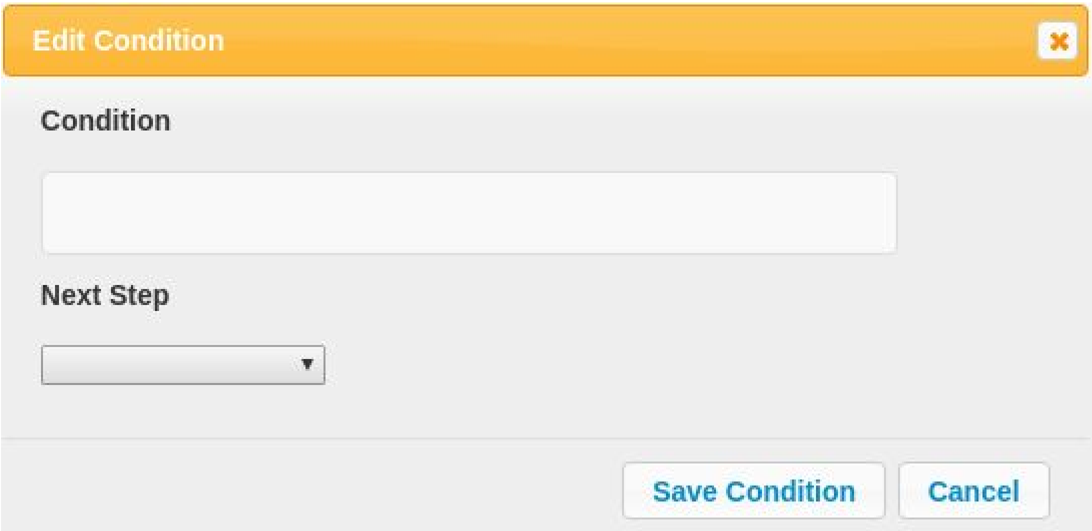
Check the Group Select Checkbox, Group Select*, to group select tags*

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:



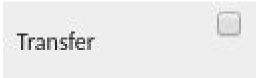
Note: To delete a Tag from the selection simply click the "X," x*, to the right of the tag name.*

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



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:



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, 

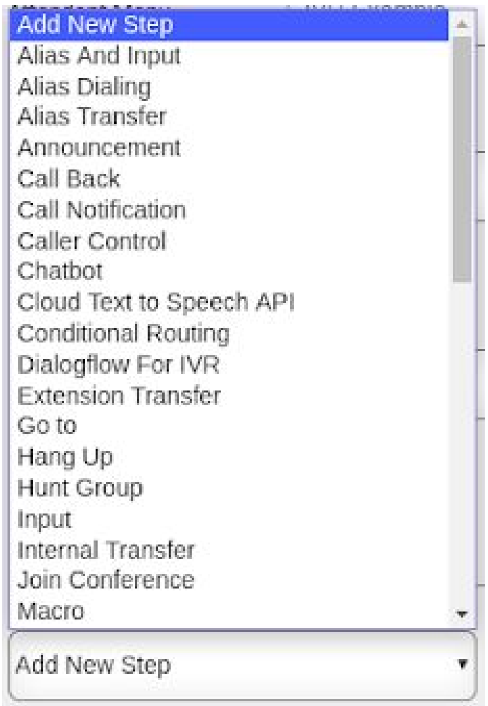
.

Adding Satisfaction Survey Question Step

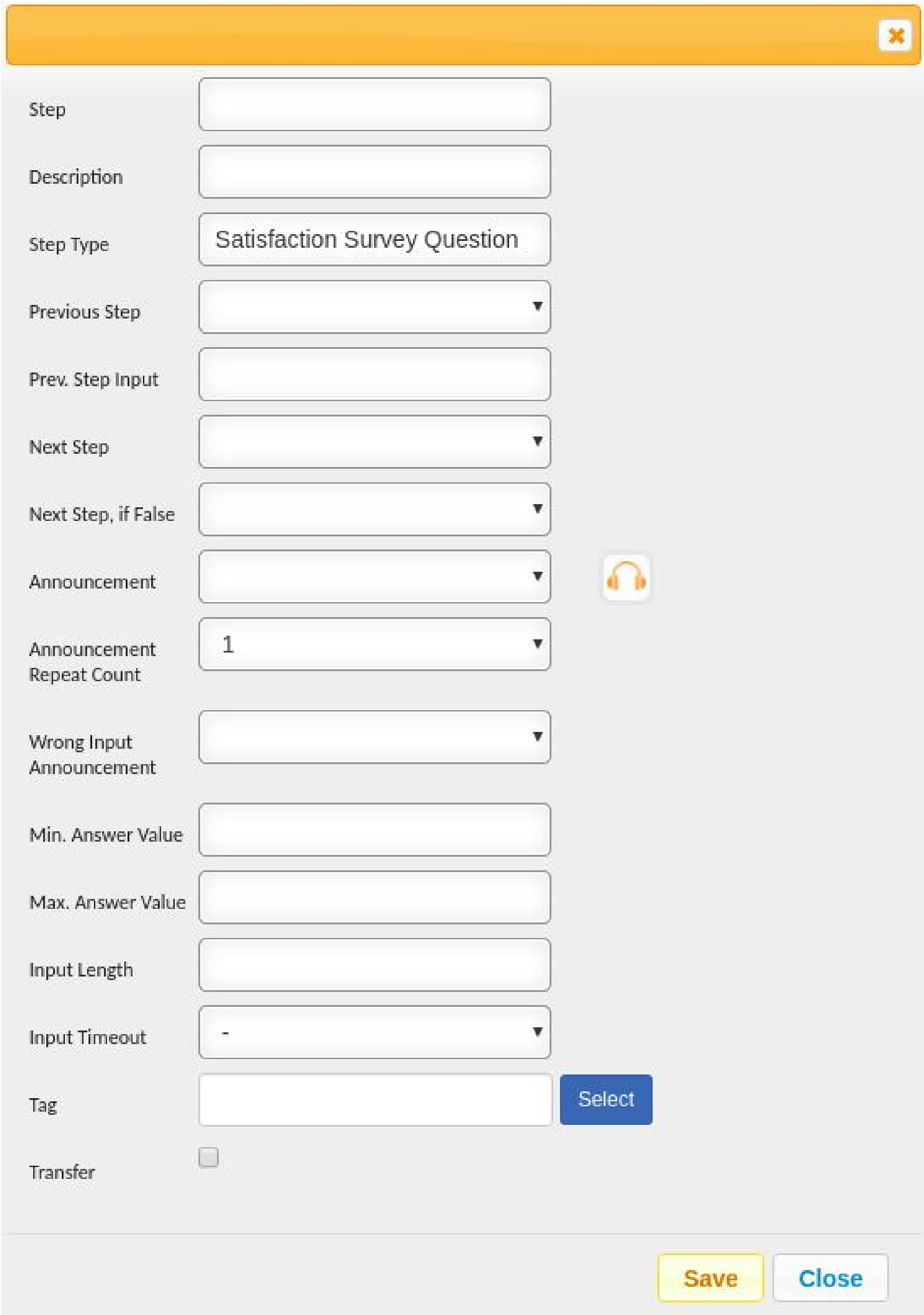
The step is used to create a customer satisfaction survey question.

1. Click the “Add New Step” dropdown box, 

, the following list will appear:



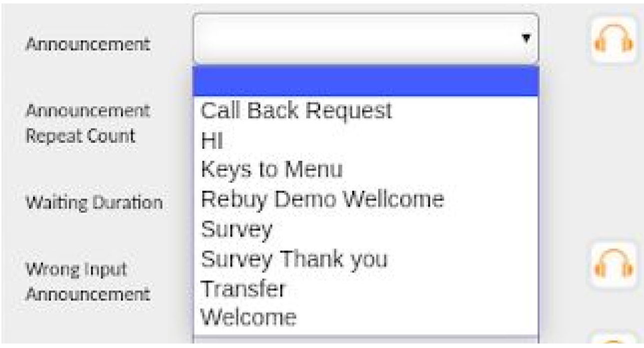
2. Select the "Satisfaction Survey Question" step the following pop-up window will appear:

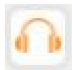


3. Click the “Step” input box, type the desired step name. An example is shown below:

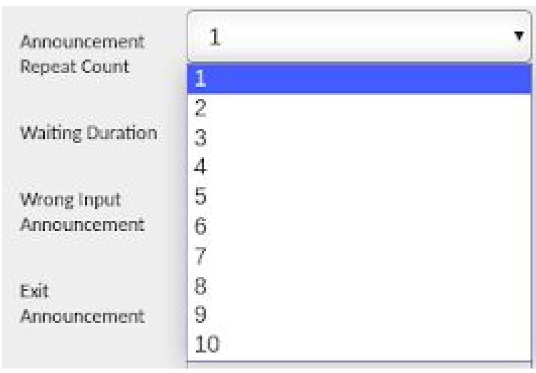
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only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

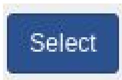


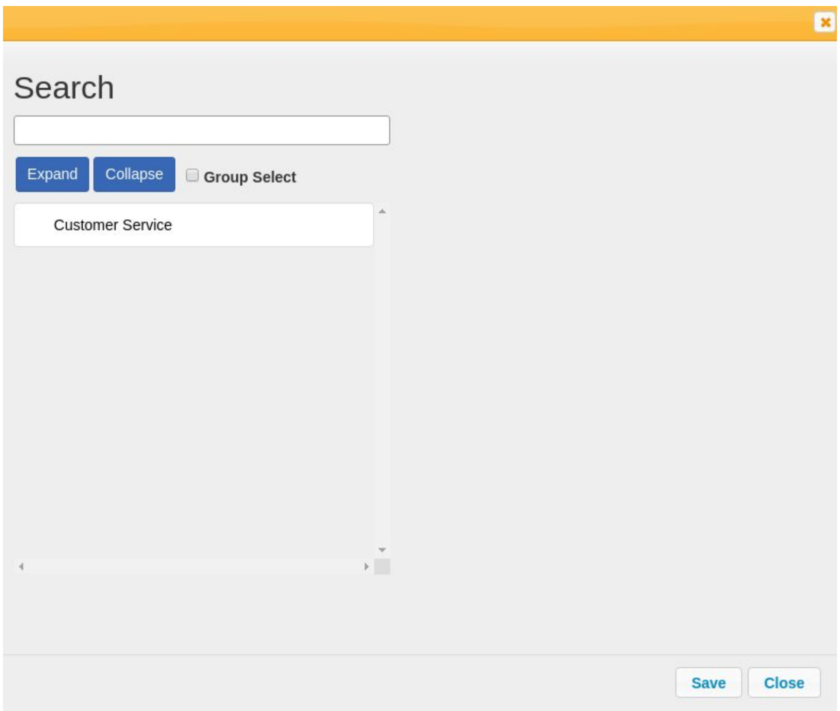
Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

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

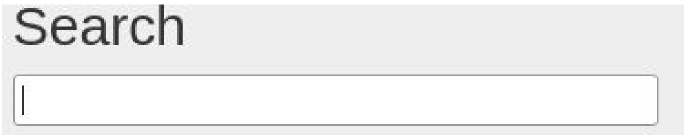


11. Select the desired repeat count.
12. Click the "Wrong Input Announcement" input box. A dropdown menu will appear with uploaded announcements (See Announcement section for uploading an announcement), select the desired announcement.

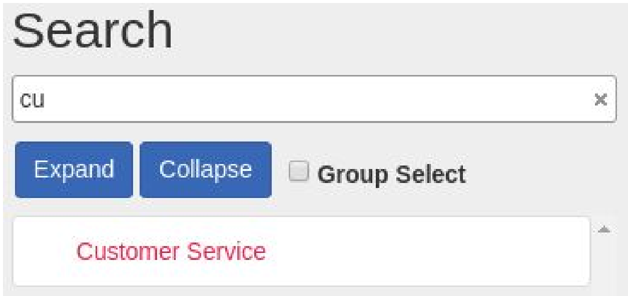
13. Click the "Min. Answer Value" input box type the minimum answer value for the customer to select. For example, if the survey range is 1 to 5, the minimum answer value would be 1.
14. Click the "Max. Answer Value" input box type the maximum answer value for the customer to select. For example, if 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:



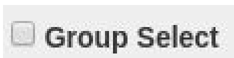
Note: Partial Tag names can be used for searching purposes all Tags with the partial name will have their name appear in red font as shown below:



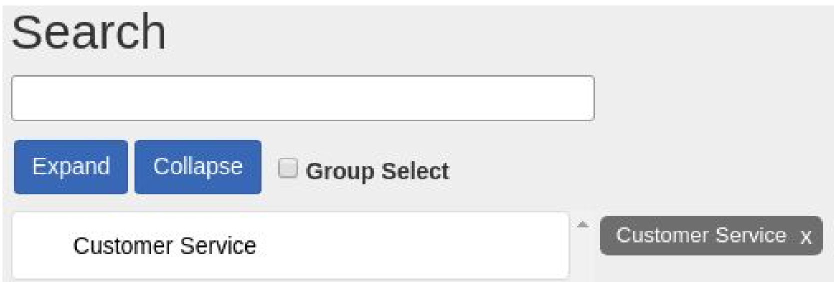
Note:

Press the Expand button,  *, to expand the selection*

Press the Collapse button,  *, to collapse the selection*

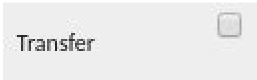
Check the Group Select Checkbox,  *, to group select tags.*

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.

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, 

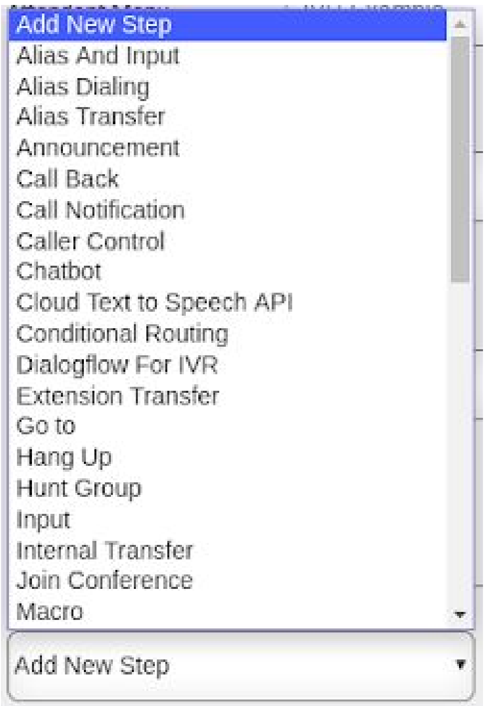
.

Adding Satisfaction Survey Result Step

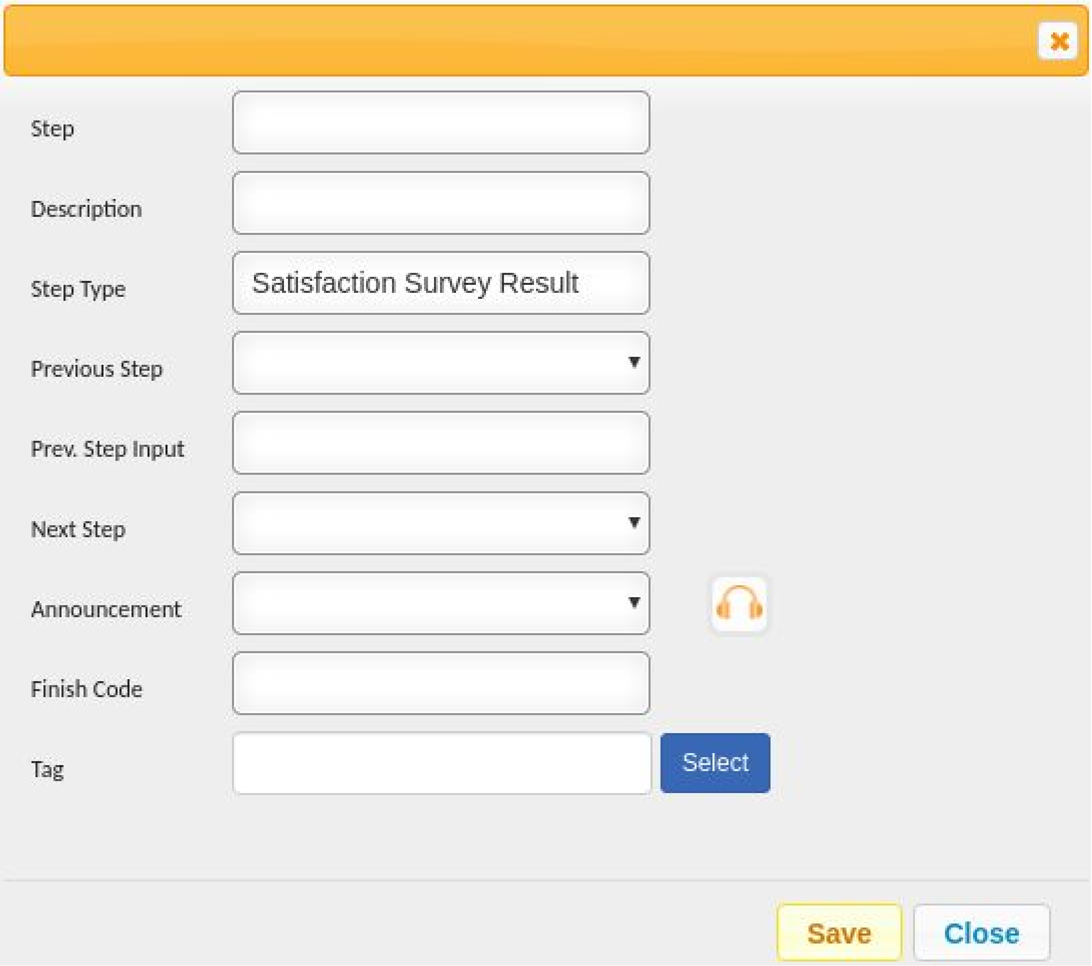
The step used to create customer satisfaction input for the satisfaction survey. (Completes the survey, without using this on the Quality Control Screen the survey will be listed as incomplete).

1. Click the “Add New Step” dropdown box, 

, the following list will appear:



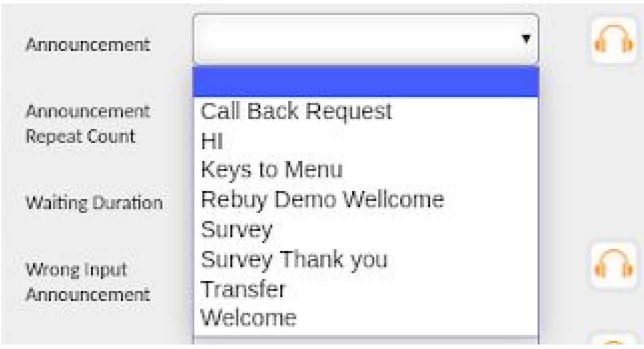
2. Select the "Satisfaction Survey Question" step the following pop-up window will appear:

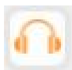


3. Click the "Step" input box, type the desired step name. An example is shown below:

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.

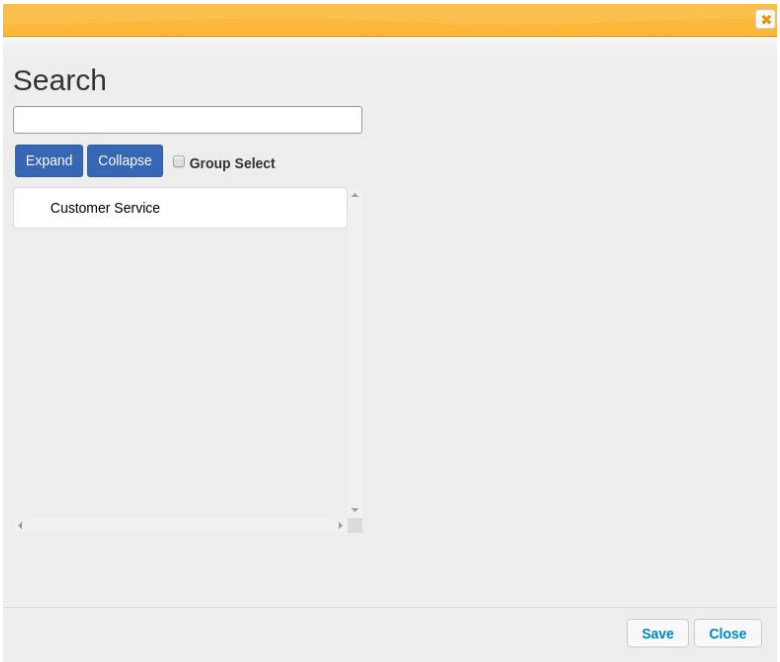
6. Click the “Previous Step Input” input box, type a desired previous step input (Only used if the previous step is an input step. For example, if the previous step is an input step, separate IVR branches can be made based on the customer’s numerical input).
7. In the “Next Step” dropdown menu, select 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.*

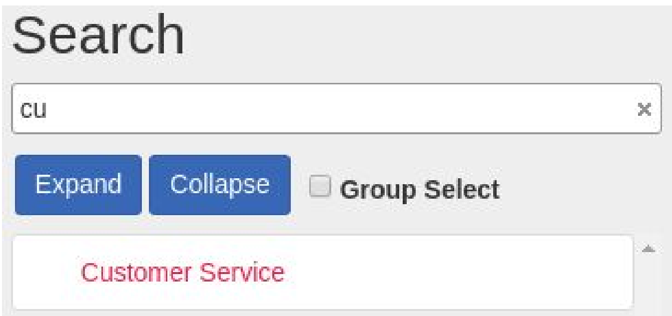
9. Click the “Finish Code” input box, type the desired finish code an example is shown below:

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:



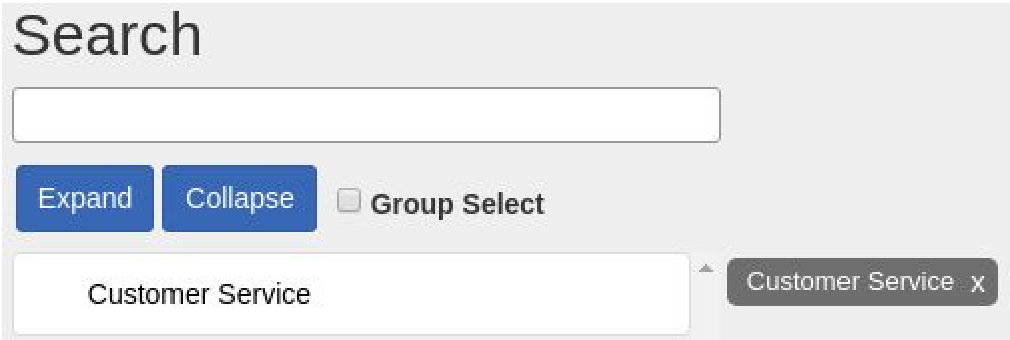
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

Check the Group Select Checkbox, Group Select *, 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," x*, to the right of the tag name.*

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

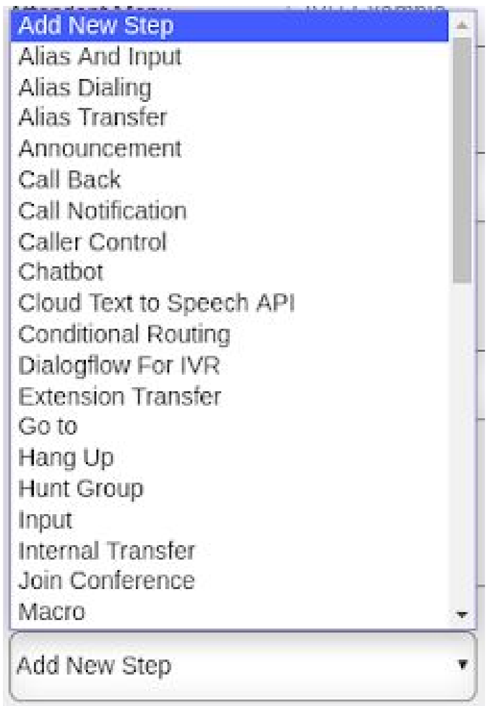
13. Click the save button, Save.

Adding Transfer Step

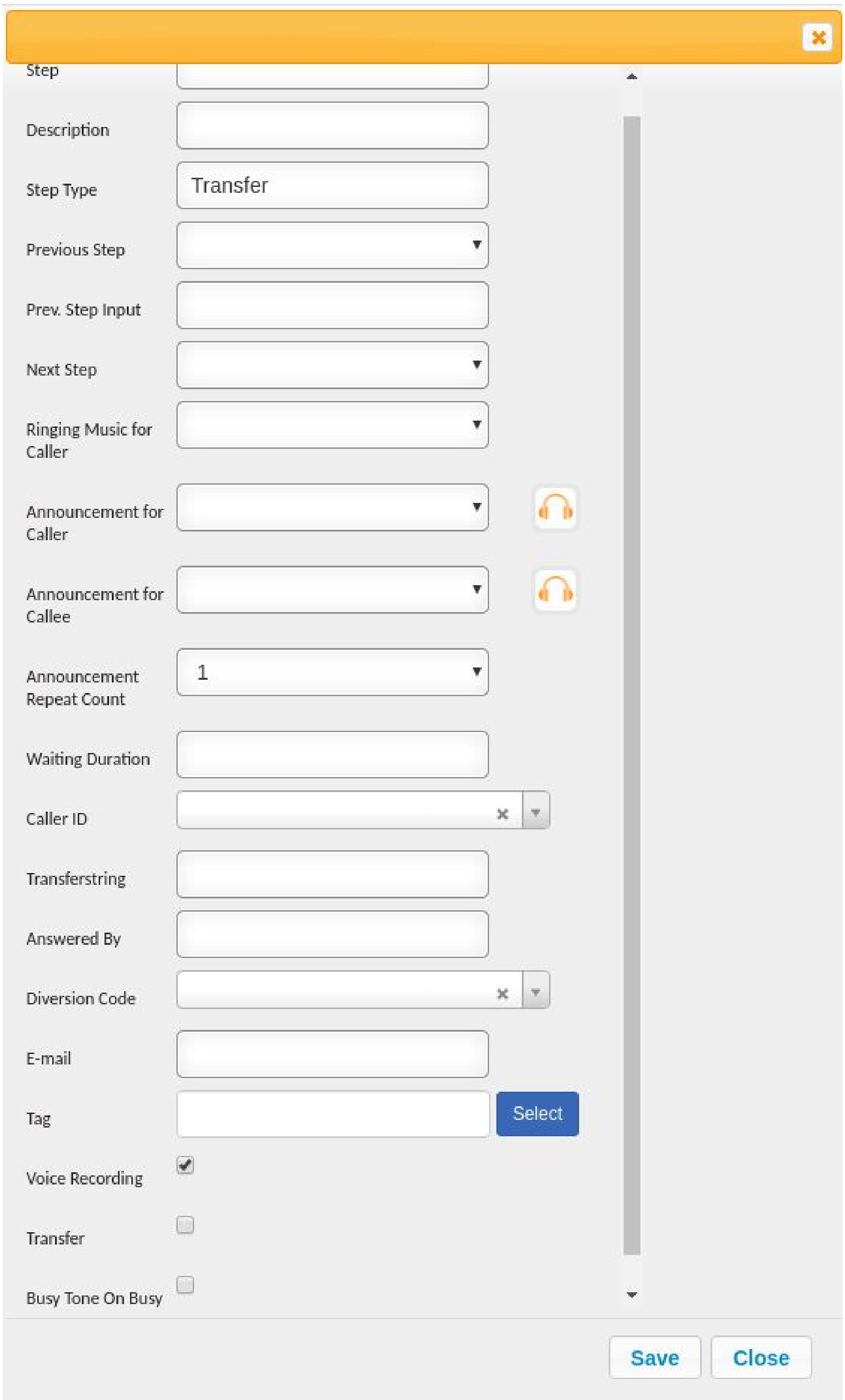
In cases where the system cannot be active due to internal/external factors or out of time, incoming calls are directed using this step to the desired number so that there are no missed calls.

1. Click the “Add New Step” dropdown box, 

, the following list will appear:

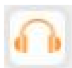


2. Select the “Transfer” step the following pop-up window will appear:



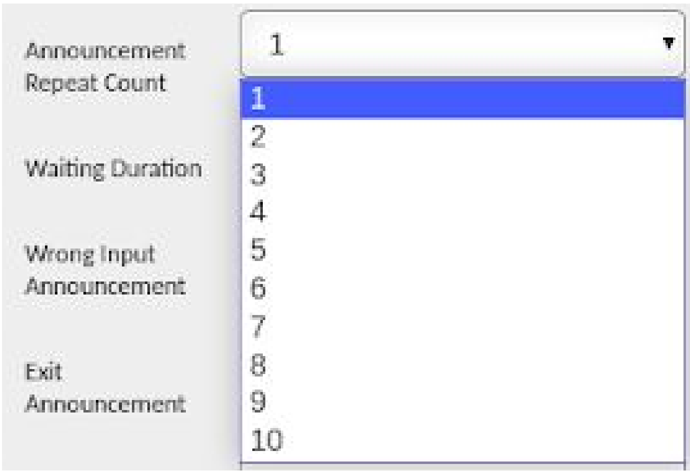
3. Click the "Step" input box, type the desired step name. An example is shown below:

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 "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).
9. 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.*

10. 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:

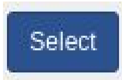


12. Select the desired repeat count.
13. In the “Waiting Duration” input box type the waiting duration for the customer input (Seconds) an example is shown below:

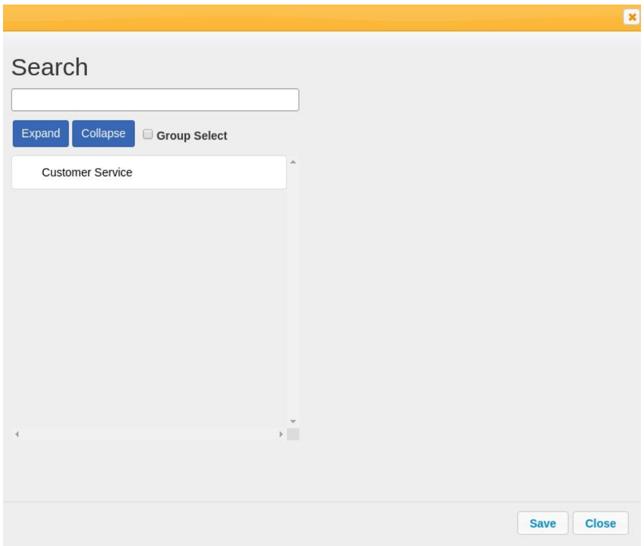
14. Click the “Caller ID” input box. A dropdown list will appear with available numbers created in the Dialplan section. (See Dialplan section for more information).
15. Click the “Transfer String” input box, type a transfer string:

    (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.

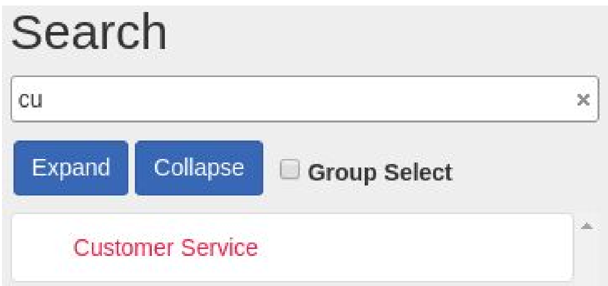
19. If a tag is desired, click the Select button, 

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:



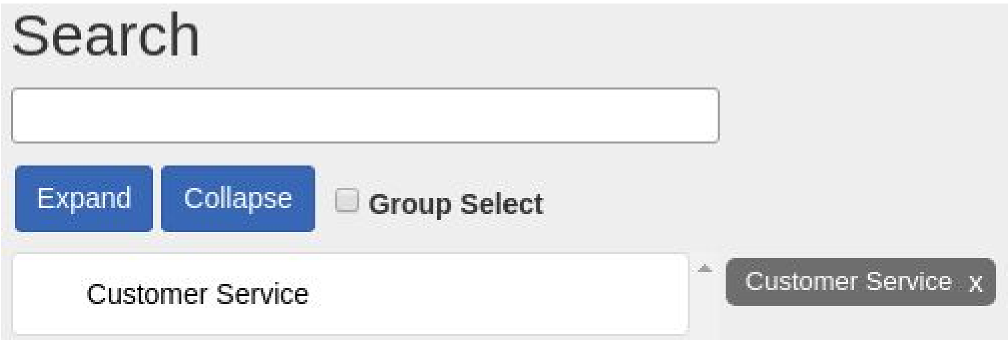
Note:

Press the Expand button, Expand*, to expand the selection*

Press the Collapse button, Collapse*, to collapse the selection*

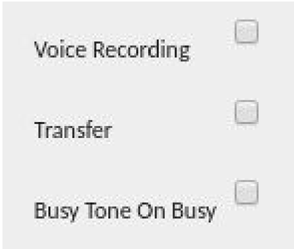
Check the Group Select Checkbox, Group Select *, to group select tags.*

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," x*, to the right of the tag name.*

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



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, 

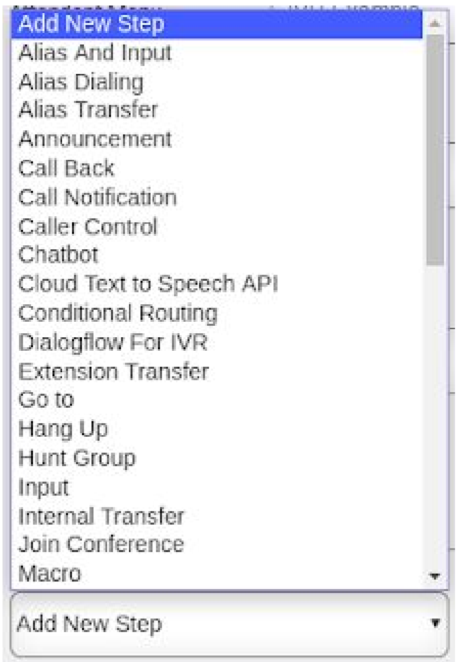
.

Adding Transfer to Last User Step

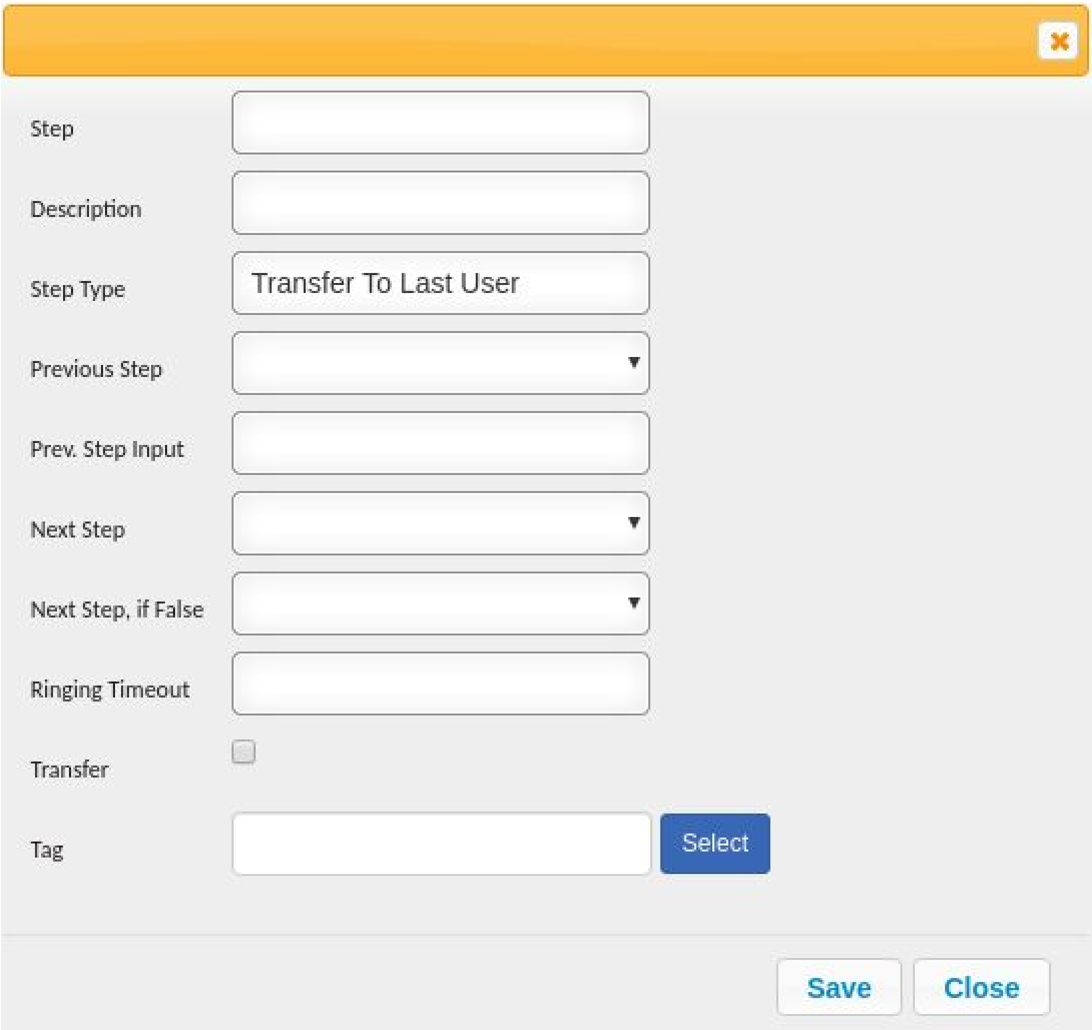
The step is used to transfer to the last user without switching to a different step. In cases where the last customer representative is not active, the call is terminated if the next step is not defined, and if defined, it is directed to the selected step. If the caller number has not been connected 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:

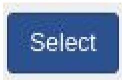


2. Select the “Transfer To Last User” step the following pop-up window will appear:

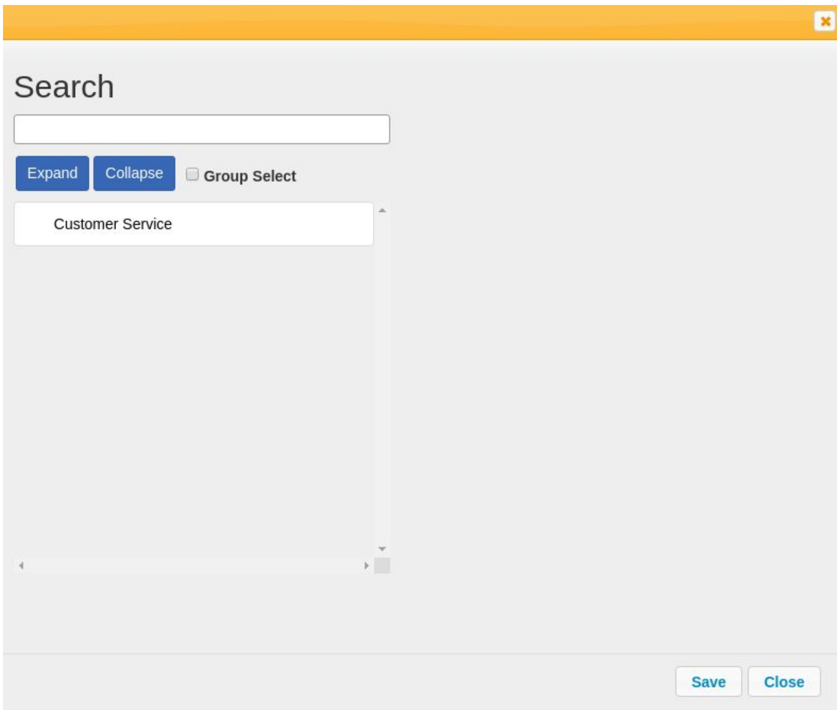


3. Click the “Step” input box, type the desired step name. An example is shown below:

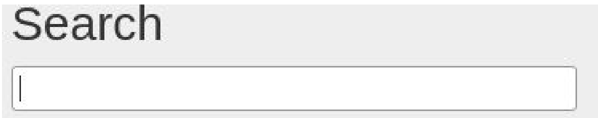
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.

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, 

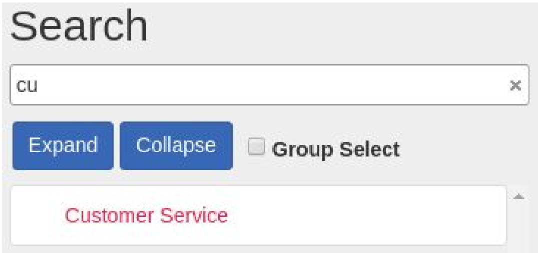
to the right of the "Tag" input box, the following pop-up window will appear:



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



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

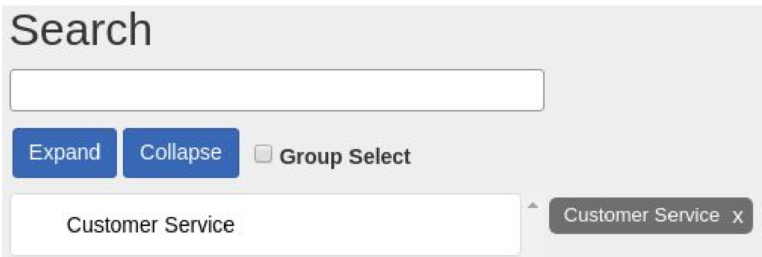
Press the Collapse button, 

, 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.

13. Click the save button, 

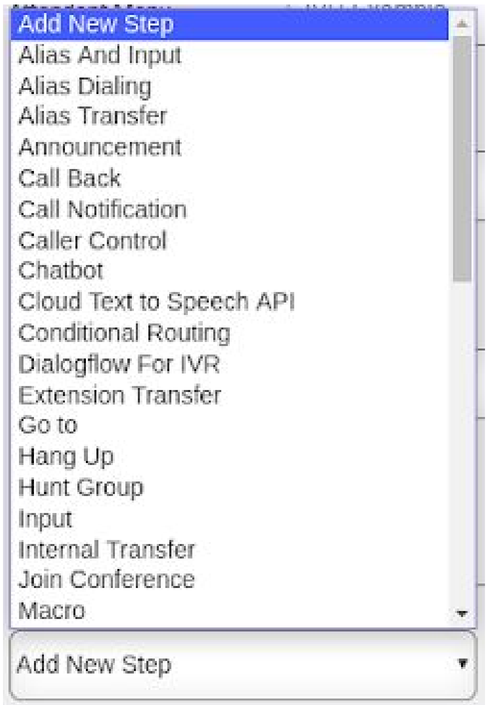
.

Adding User Transfer Step

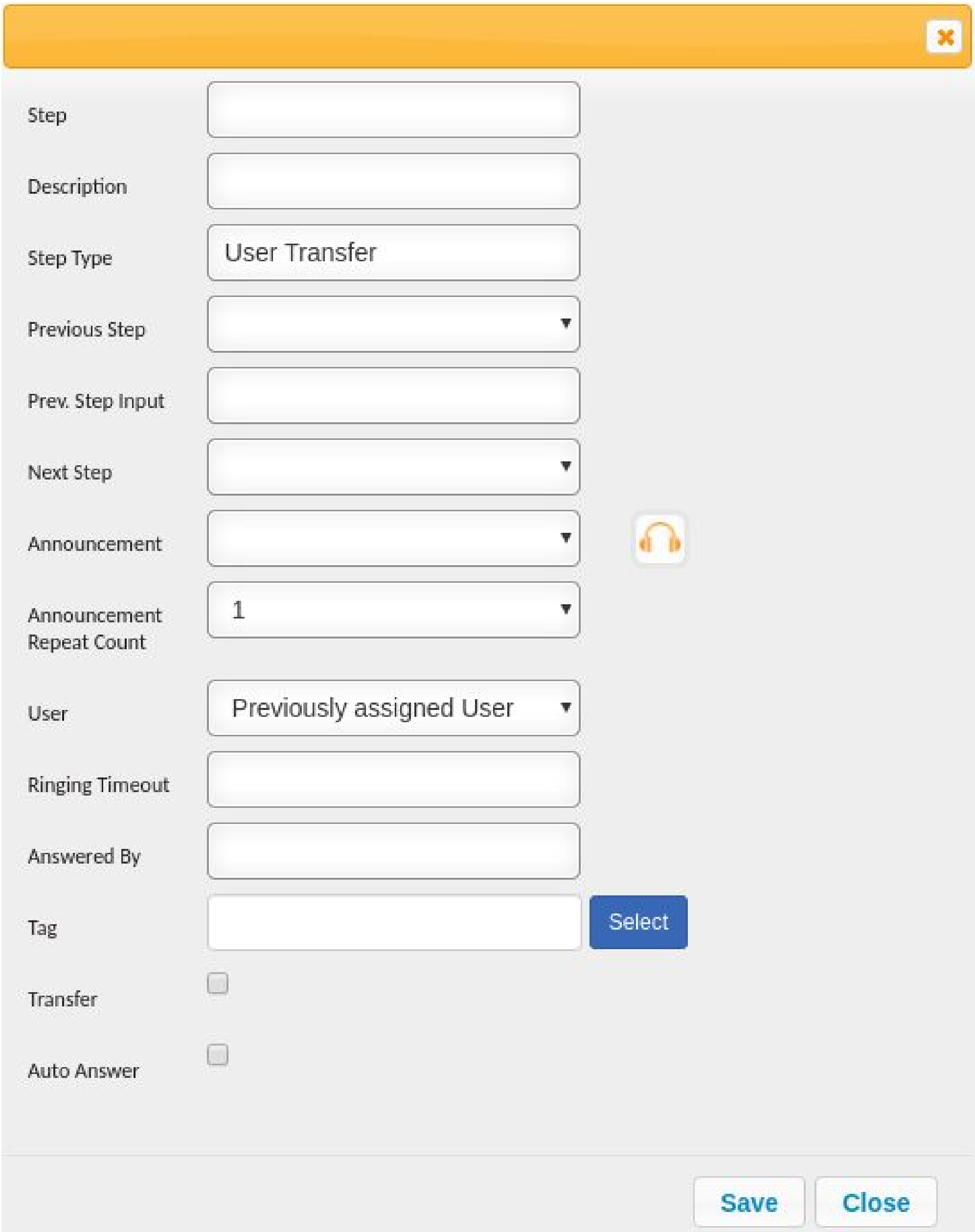
It is used to ensure that incoming calls are transferred to the selected user without being assigned to a particular queue. For calls to arrive, the Agent does not need to switch to "available" status, it is sufficient to have default or custom status. If the user is not in the system at the time of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

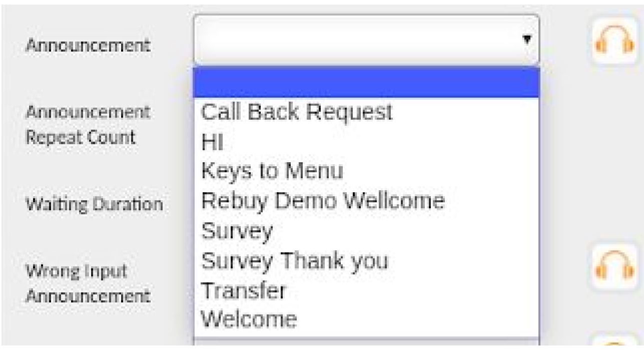


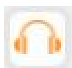
2. Select the “User Transfer” step the following pop-up window will appear:



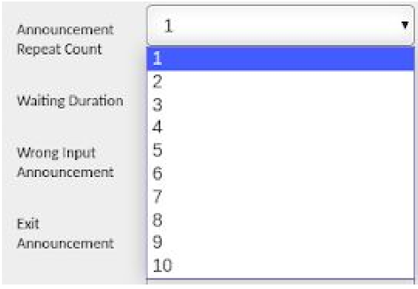
3. Click the “Step” input box, type the desired step name. An example is shown below:

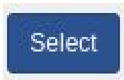
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only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

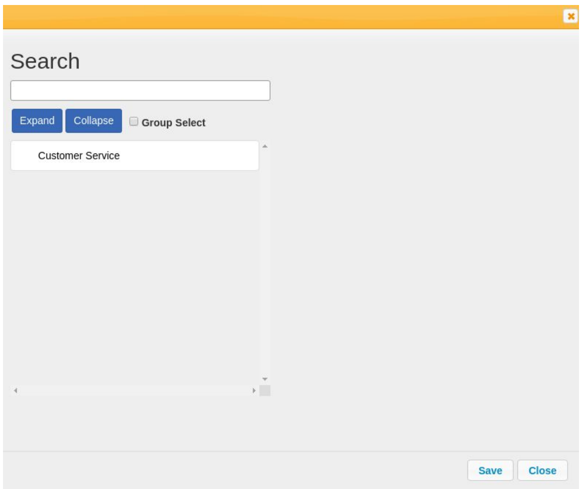


Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

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

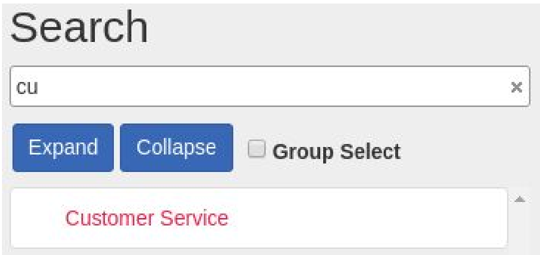


10. Select the desired repeat count.
11. In the “User” dropdown list, select the desired agent to transfer to, or select previously assigned user (used to route the call back to the agent that the customer was previously speaking to).
12. In the “Ringing Timeout” input box, type the desired ringing Timeout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

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

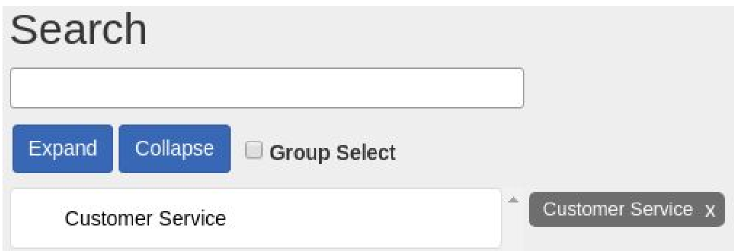
Press the Collapse button, 

, to collapse the selection

Check the Group Select Checkbox, 

, to group select tags.

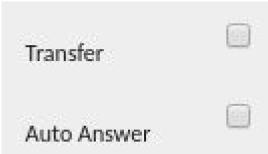
Once a Tag is selected in the pop-up window, it can be viewed to the right of the tag list box, as shown below:



Note: To delete a Tag from the selection simply click the "X," 

, to the right of the tag name.

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 chafing to click the answer button.

18. Click the save button, 

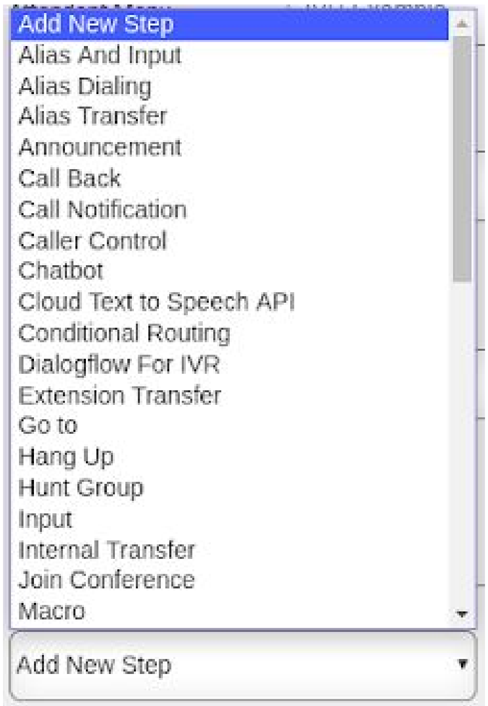
.

Adding Voicemail Step

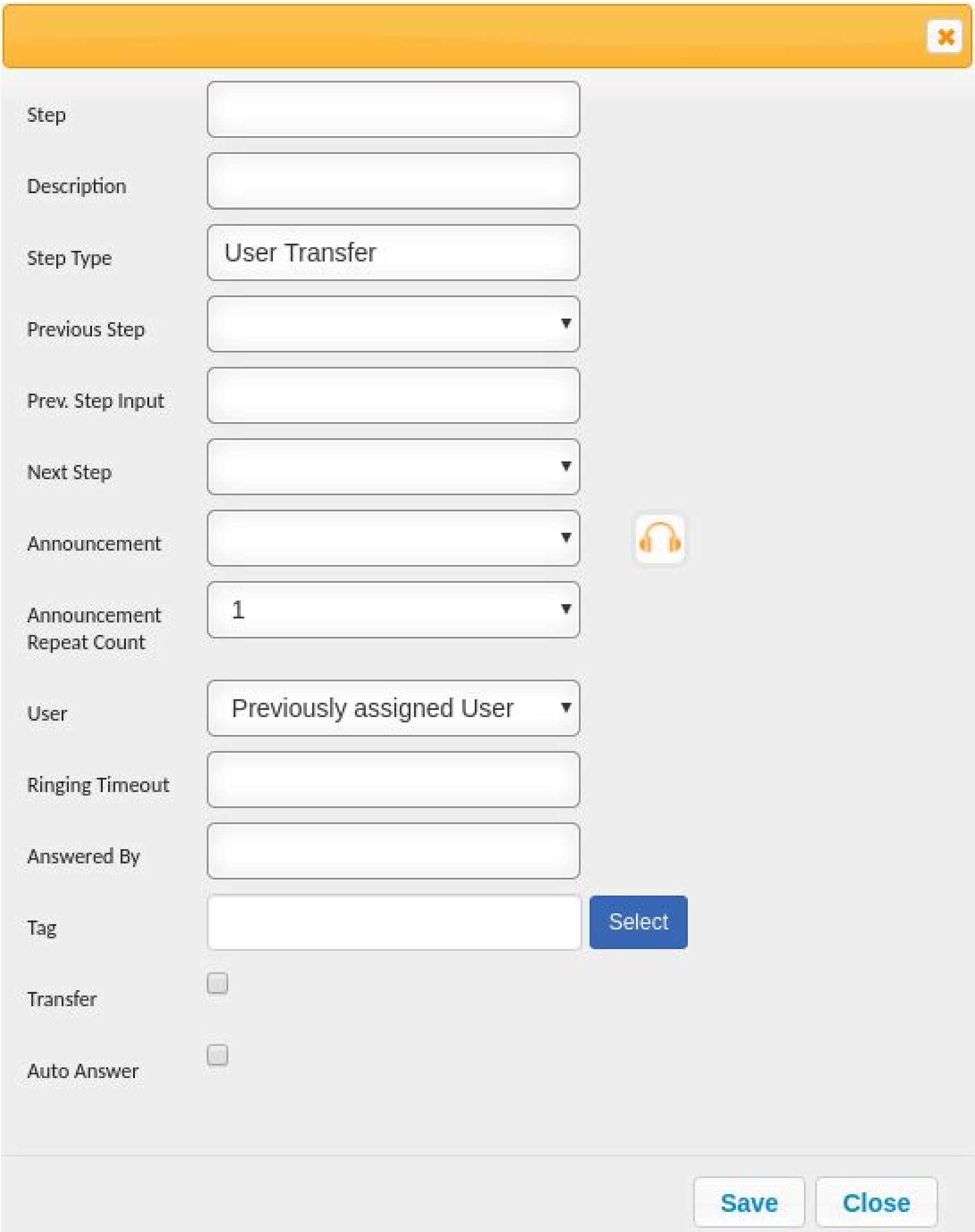
When incoming calls are forwarded to this step, voicemails are sent to the specified email address.

1. Click the "Add New Step" dropdown box, 

, the following list will appear:

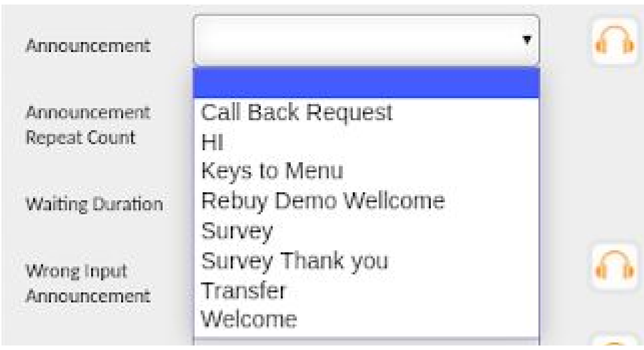


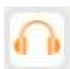
2. Select the "User Transfer" step the following pop-up window will appear:

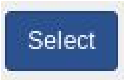


3. Click the “Step” input box, type the desired step name. An example is shown below:

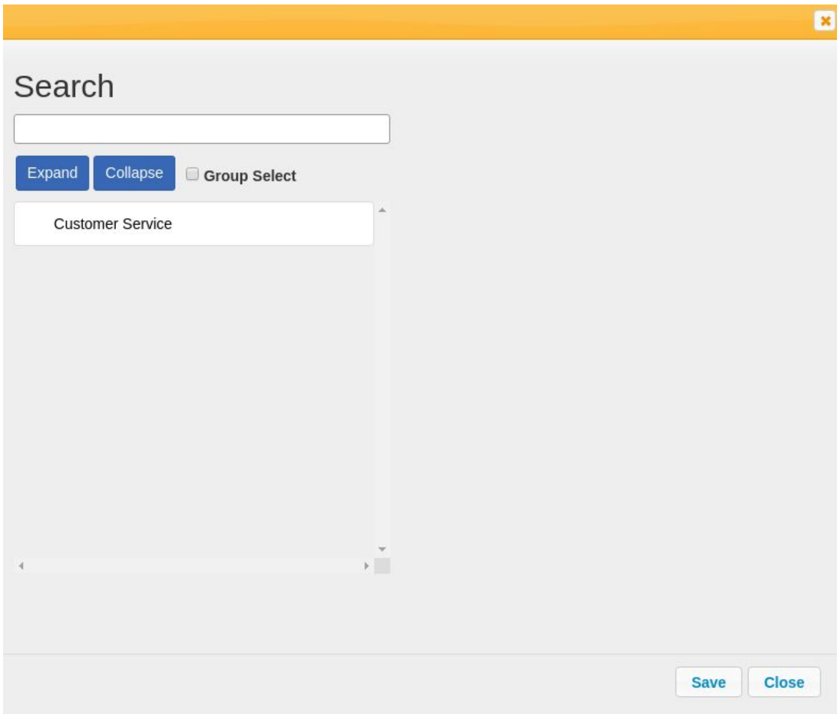
4. If desired in the “Description” input box, type a description for the step.
5. In the “Previous Step” dropdown menu, select the desired previous step. It is recommended to link all steps after setting up the IVR.
6. Click the “Previous Step Input” input box, type a desired previous step input (Only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



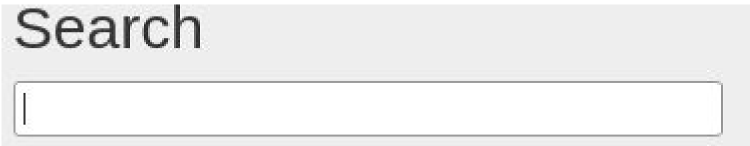
Note: Announcements can be listened to by clicking the following button,  *, located to the right of each Announcement dropdown list.*

9. 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, 

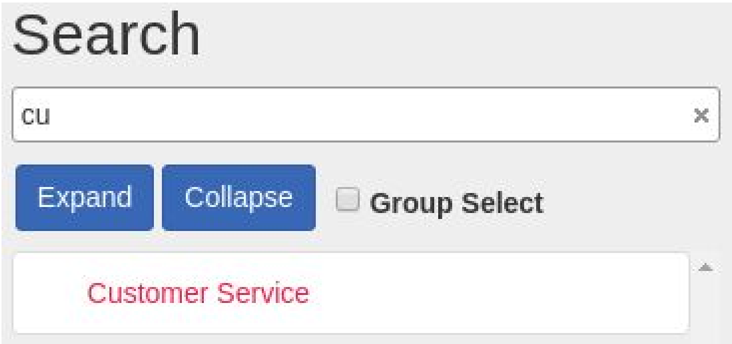
to the right of the "Tag" input box, the following pop-up window will appear:



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



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

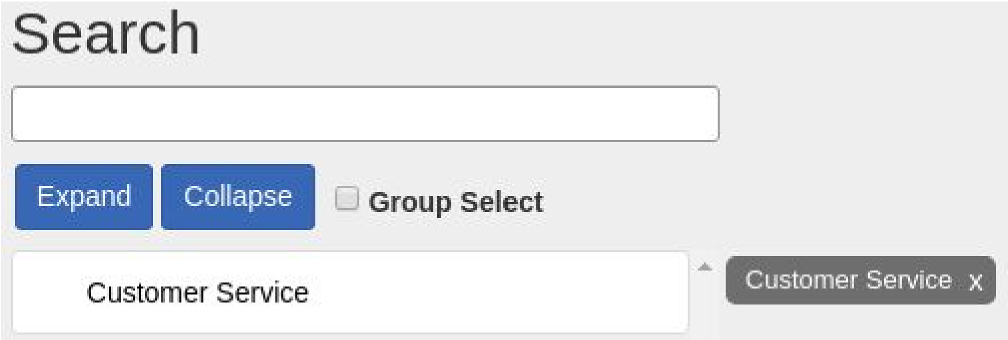
Press the Collapse button, 

, to collapse the selection

Check the Group Select Checkbox, 

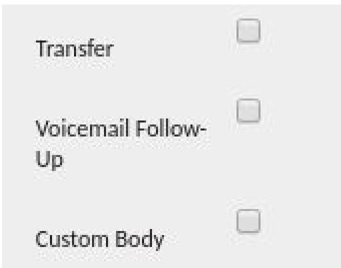
, to group select tags.

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.

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:



The descriptions of these checkboxes are explained below:

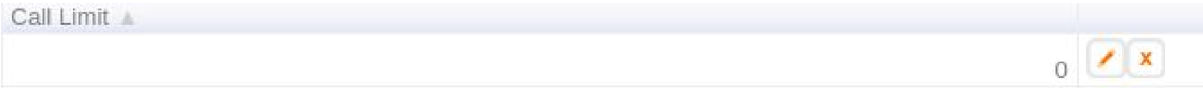
Transfer	Used by the Call Center Studio Development Team (Do not check)
Voicemail Follow-Up	When checked, the following input box will be displayed:  Type the desired control time. Follow-up will be initiated after the control time has passed.
Custom Body	If checked, the custom body input box will be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

16. Click the save button, 

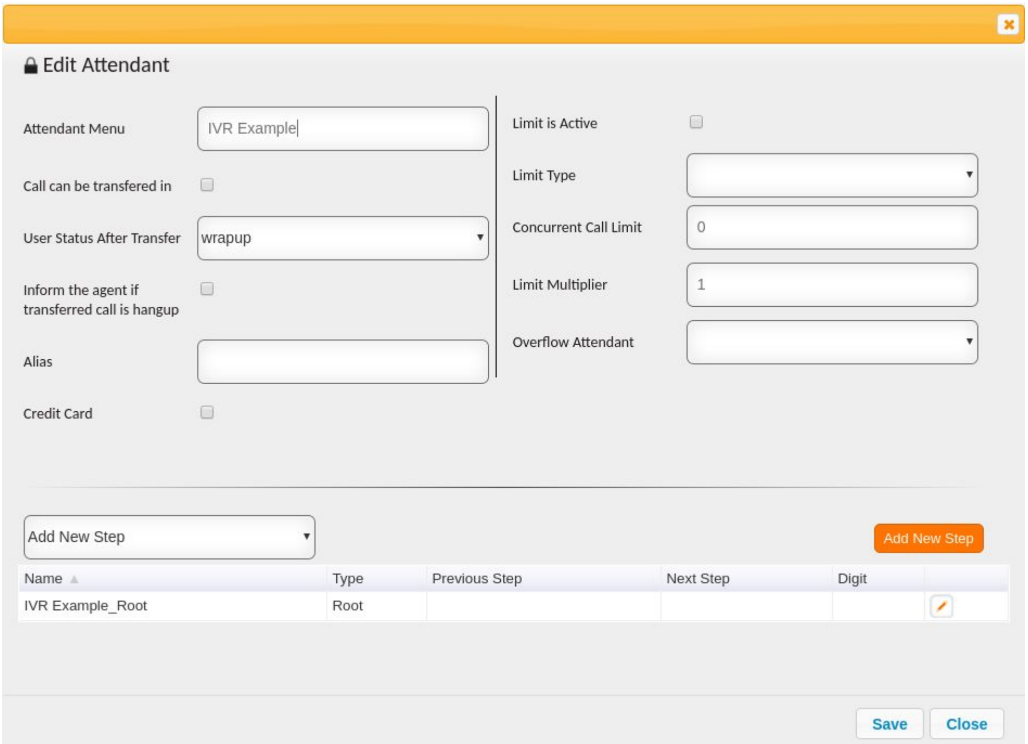
.

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:

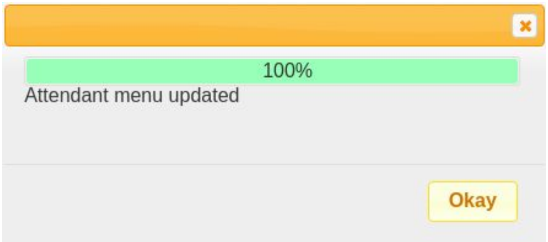


After clicking the edit button, the IVR window will appear as shown:



2. Make changes as desired.

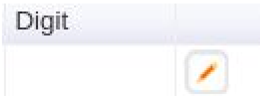
3. Once the desired changes have been completed, the information can be saved by clicking the save button,  , the following pop-up box will appear:



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:

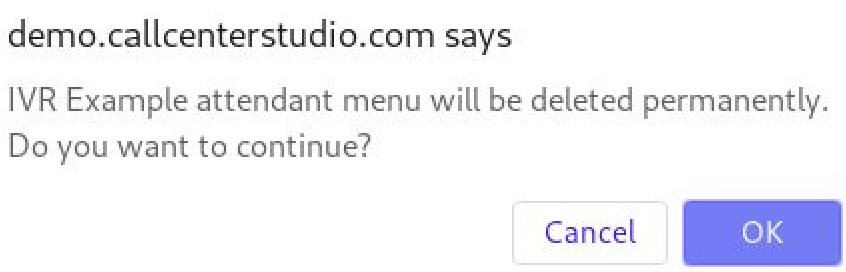


2. Make changes as desired.
3. Click the save button, 

.

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:



- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK*, to confirm the deletion.*

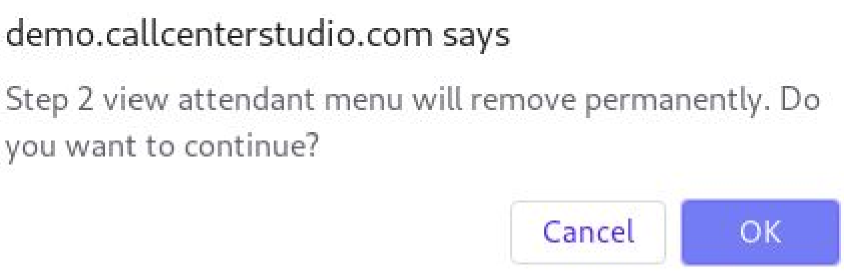
2. Confirm the deletion by clicking the OK button, OK.

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

<u>Deleting an IVR Step</u>

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:



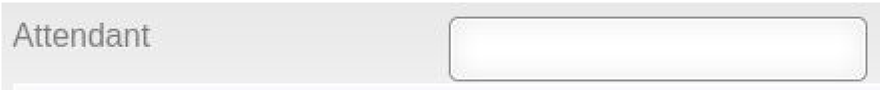
- *Select the cancel button,* Cancel *, to cancel the deletion.*
- *Select the OK button,* OK*, to confirm the deletion.*

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

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:



Note: Partial names can be used when spelled correctly.