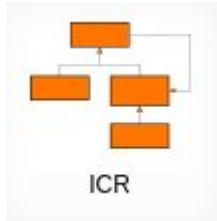



ICR



The Interactive Chat Response tab serves a similar function in chats that the Interactive Voice Response serves for phone calls. For example, a chat can be automated and routed to specific chat queues for agents to answer customer questions. Customers can be routed to a conditional chat system that answers consumer questions based on specified inputs.

Creating an ICR

1. Click the “Add ICR” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:

A screenshot of a pop-up form titled "ICR Name" with a close button (X) in the top right corner. Below the title is a text input field containing the placeholder text "ICR Name". At the bottom right of the form is a blue "Save" button.

ICR Name

ICR Name

Save


2. Click the “ICR Name” input box, type the name of the ICR an example is shown below:

A screenshot of the same "ICR Name" pop-up form, but with the text input field containing the example text "ICR". The input field has a blue border and a yellow highlight. The "Save" button remains at the bottom right.

ICR Name

ICR


Save

3. Click the “Save” button, , the following screen will appear with the name of the created ICR in the top left corner of the screen, as shown below:



Note: This is a partial screenshot of the screen that will appear, notice the name assigned in this example, “ICR,” is located in the top left corner. Also, the first step always follows the same format shown below:


Name assigned to ICR_Root

- Click the “Edit” button for the root step, , located to the right of the Next Step column, after clicking the following pop-up window will be displayed on the right-hand side of the screen:

Root Step Settings


Step Name	<input type="text" value="ICR_Root"/>
Description	<input type="text" value="Description"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Announcement	<div>Announcement</div>
Chat evaluation	<input type="checkbox"/>
Chat Evaluation Whatsapp Message Duration	<input type="text" value="Chat Evaluation Message Duration"/>
Chat Evaluation Whatsapp Message	<div>Chat Evaluation Message</div>

- Click the “Step Name” input box, type the desired step name. (Note in all steps if a number is used, the ICR will display the steps in numerical order. For example, 1.ICR_Root)
- Click the “Description” input box, type the desired description.

-
7. The “Next Step” dropdown menu can be used to link up the next step. Next Steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the ICR and then linking the steps using the Next Step dropdown box.
 8. Click the “Announcement” input box, type the desired announcement.
 9. If Chat evaluation is desired, check the “Chat evaluation” checkbox. (used only for WhatsApp & Infobip chat widgets)
 10. Select the “Chat Evaluation Whatsapp Message Duration” input box type the desired time duration (Seconds)
 11. Select the “Chat Evaluation Whatsapp Message” input box type the desired message.
 12. Click the save button,  .

Adding Announcement Step

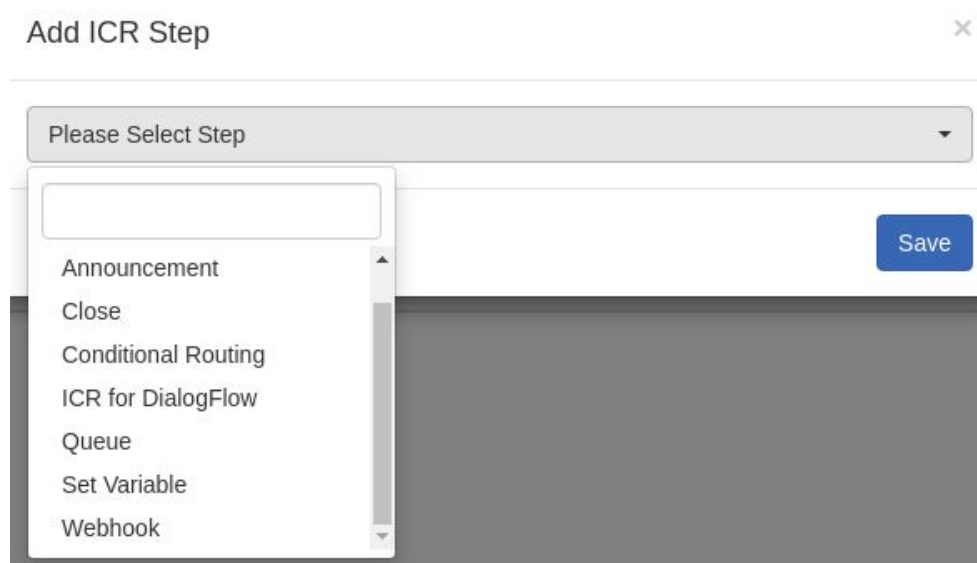
The announcement step is a message that the customer will receive. It can be used in multiple ways, for example, as the next step in a conditional routing selection.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



A screenshot of the 'Add ICR Step' pop-up window. It has a title bar with 'Add ICR Step' and a close button. Below the title bar is a dropdown menu with the text 'Please Select Step'. At the bottom right of the window is a blue 'Save' button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




A screenshot of the 'Add ICR Step' pop-up window with the dropdown menu open. The dropdown menu lists the following options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The 'Save' button is visible in the bottom right corner.

3. Select the “Announcement” step from the dropdown list; an example selection is shown below:

Add ICR Step

Announcement

Save


4. Click the Save button, , the following will appear on the right-hand side of the screen:

Announcement Step Settings


Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Announcement	<div>Announcement</div>


Save

Cancel

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. The “Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
 8. Click the “Announcement” input box, type the desired announcement.
 9. Click the “Save” button,  .

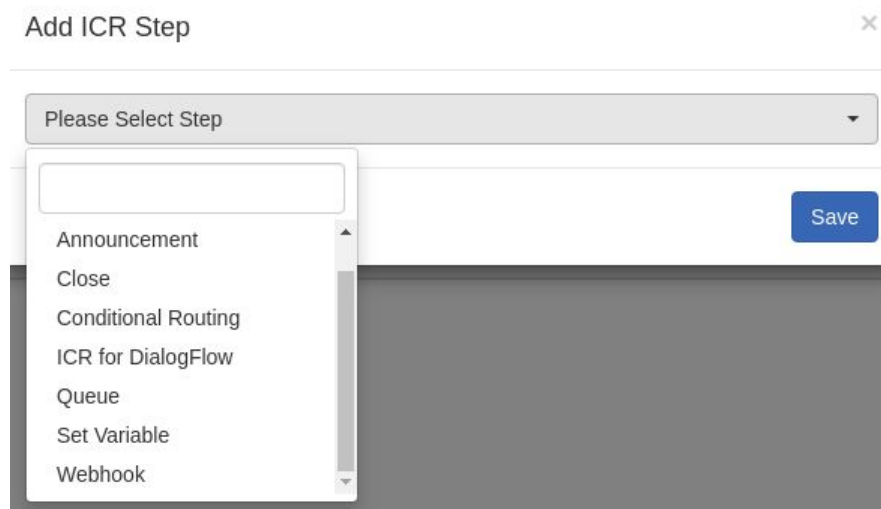
Adding Close Step

1. After creating a new ICR, click the “Add ICR” Step button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



The image shows a pop-up window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the window, there is a dropdown menu with the text "Please Select Step" and a downward arrow. At the bottom right of the window is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The image shows the same "Add ICR Step" pop-up window, but the dropdown menu is now open, displaying a list of options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains at the bottom right.

3. Select the “Close” step from the dropdown list; an example selection is shown below:

Add ICR Step ×

Close

Save

4. Click the “Save” button, , the following will appear on the right-hand side of the screen:


Close Step Settings

Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Announcement	<div>Announcement</div>

Save


Cancel

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. Click the “Announcement” input box, type the desired announcement, the customer will see before the chat closes.

8. Click the “Save” button,  .

Adding Conditional Routing Step

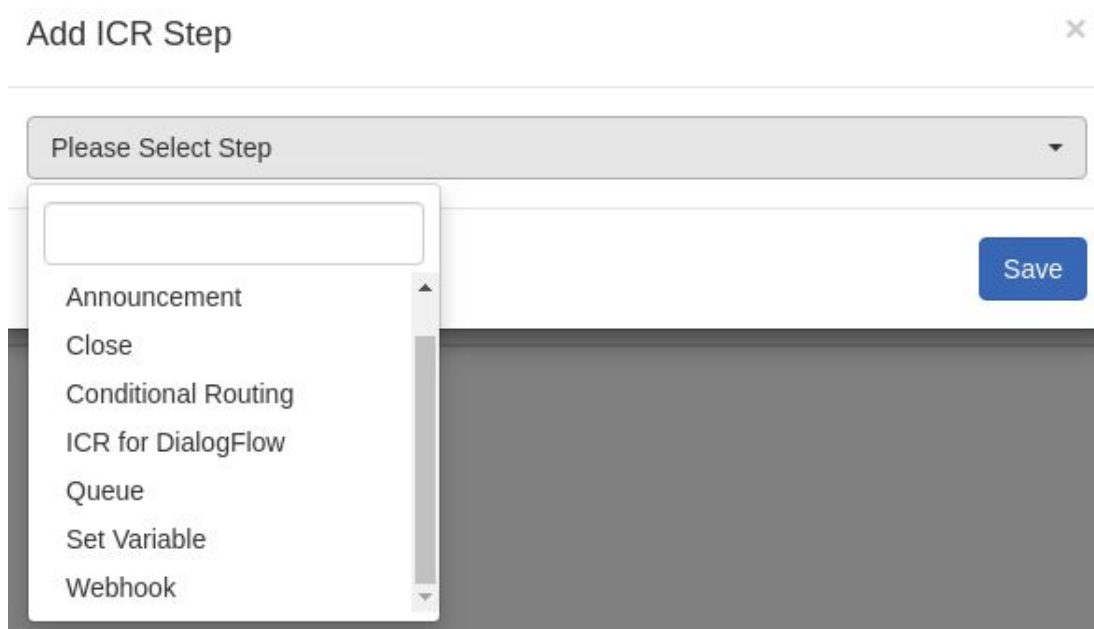
The conditional routing step allows the customer to make selections based on built-in conditions (Note: usually, a variable step is created before the conditional formatting step).

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



A pop-up window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the window, there is a dropdown menu with the text "Please Select Step" and a downward arrow. At the bottom right of the window is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The same "Add ICR Step" pop-up window as above, but with the dropdown menu open. The menu lists the following options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains at the bottom right.

3. Select the “Conditional Routing” step from the dropdown list; an example selection is shown below:

Add ICR Step

Conditional Routing

Save

4. Click the “Save” button, , the following will appear on the right-hand side of the screen:



Conditional Routing Step Settings

Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Default Next Step	<input type="text" value="Please Select Next Step"/>


Condition

Next Step



Save

Cancel

5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.
7. The “Default Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box. (For conditional routing a default next step is not necessary)
8. Click the “New Step” button,  the following will appear:



9. The “Condition Name” input box is a formula based on the customer’s response. An example is shown below:

Note: This conditional formatting formula is based on the variable “mainmenu” created in a variable step, as shown below:

Set Variable Step Settings

Step Name	<input type="text" value="01.Main Menu"/>
Description	<input type="text" value="Description"/>
Set Variable Name	<input type="text" value="mainmenu"/>

Note: See Variable Step Section for creating a variable step. In this step, if the customer inputs the number “1,” the customer will be transferred to step defined below:

-
10. Click the dropdown menu under the “Condition Name” input box. (Note: Normally this is done after all the steps are completed, to link the conditional routing with the next steps). An example is shown below:

A screenshot of a web form element, specifically a dropdown menu. The menu is open, showing a single option: "02.Enter the Credit amount". The text is in a standard sans-serif font, and there is a small downward-pointing arrow on the right side of the menu box.

Note: In this example, if the customer inputs “1” then, the customer will be transferred to “02.Enter the Credit amount” step.


11. Repeat steps 8-10 until the desired amount of conditional formatting steps is reached.



12. Click the save button, .

Adding ICR DialogFlow Step

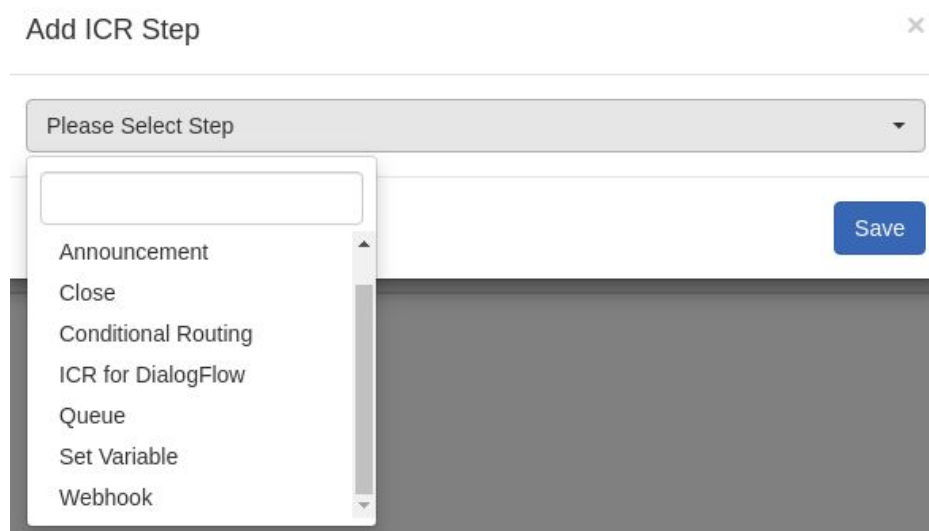
A chatbot can be created using Google Dialogflow. By creating this step, the desired language of the dialog flow can be used by the customer for ease of communication with the agent. Google Dialogflow transmits the conversation's responses into each user's preferred language.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



A pop-up window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the window, there is a dropdown menu with the text "Please Select Step" and a downward arrow. At the bottom right of the window is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The same "Add ICR Step" pop-up window is shown, but the dropdown menu is now open, displaying a list of options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains at the bottom right.

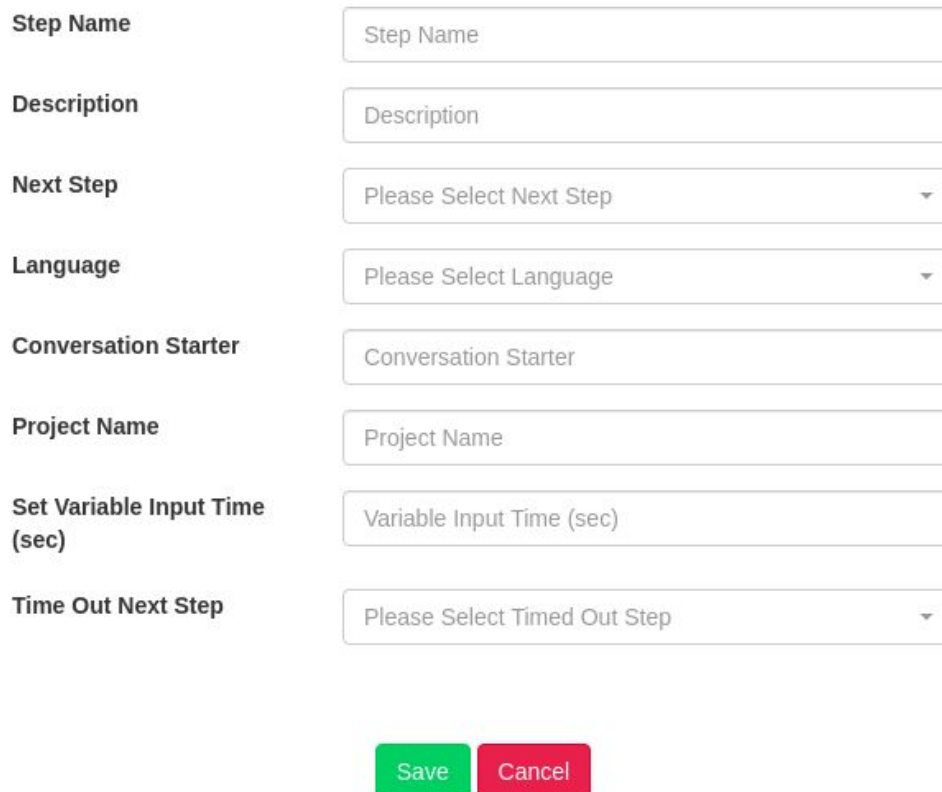
3. Select the “ICR for DialogFlow” step from the dropdown list; an example selection is shown below:



A dialog box titled "Add ICR Step" with a close button (X) in the top right corner. Inside the dialog, there is a dropdown menu with "ICR for DialogFlow" selected. Below the dropdown is a blue "Save" button.

4. Click the “Save” button, , the following will appear on the right-hand side of the screen:

ICR for DialogFlow Step Settings



A form titled "ICR for DialogFlow Step Settings" with the following fields:


Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Language	<input type="text" value="Please Select Language"/>
Conversation Starter	<input type="text" value="Conversation Starter"/>
Project Name	<input type="text" value="Project Name"/>
Set Variable Input Time (sec)	<input type="text" value="Variable Input Time (sec)"/>
Time Out Next Step	<input type="text" value="Please Select Timed Out Step"/>

At the bottom of the form are two buttons: a green "Save" button and a red "Cancel" button.

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. The “Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
 8. Click the “Language” dropdown menu, select the desired language.
 9. Click the “Conversation Starter” input box, type the desired conversation starter. It is the first sentence the customer sends to the chat.


Note: For a generic string to trigger the Dialogflow type: \$initial_message

10. Click the “Project Name” input box, type the desired project name. (ID of the dialog flow project opened on behalf of the customer in Google Cloud Platform.) (Contact the assigned Call Center Studio Project Manager for the Project Name.)
11. Click the “Set Variable Input Time (sec)” input box, type the desired timeout period.
12. The “Time Out Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.

13. Click the “Save” button,  .

Adding Queue Step

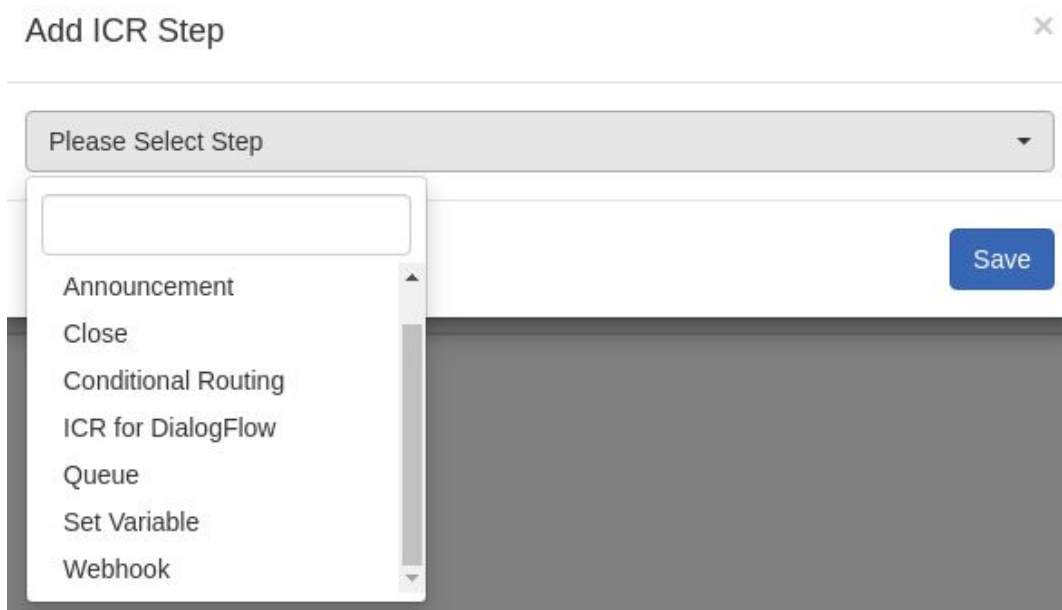
The queue step is used to connect a customer with the appropriate chat queue. (Note: it can be used after a conditional routing step to send the customer to the appropriate chat queue).

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



The image shows a modal window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the modal, there is a dropdown menu with the text "Please Select Step" and a downward arrow. At the bottom right of the modal is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The image shows the same "Add ICR Step" modal window, but the dropdown menu is now open, displaying a list of options: "Announcement", "Close", "Conditional Routing", "ICR for DialogFlow", "Queue", "Set Variable", and "Webhook". The "Save" button remains at the bottom right.

3. Select the “Queue” step from the dropdown list, an example selection is shown below:

Add ICR Step

Queue

Save


4. Click the “Save” button, , the following will appear on the right-hand side of the screen:

Queue Step Settings

Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Next Step	<div>Please Select Next Step</div>
Queue	<div>Please Select Queue</div>
Enable Reserved Agent	<input type="checkbox"/>
Reserved Agent	<input type="text" value="Reserved Agent"/>


Save

Cancel

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. The “Next Step” dropdown menu can be used to link up the next step. Next steps can only be linked to previous steps after the step is created. It is recommended to link all steps after setting up the IVR and then linking the steps using the Next Step dropdown box.
 8. Click the “Queue” dropdown menu, select the desired chat queue.
 9. A reserve agent can be enabled if desired by checking the “Enable Reserved Agent” Checkbox.
 10. If the “Enable Reserved Agent” checkbox is selected, type the reserve agent’s name.
 11. Click the “Save” button,  .

Adding Out of Working Hours Step

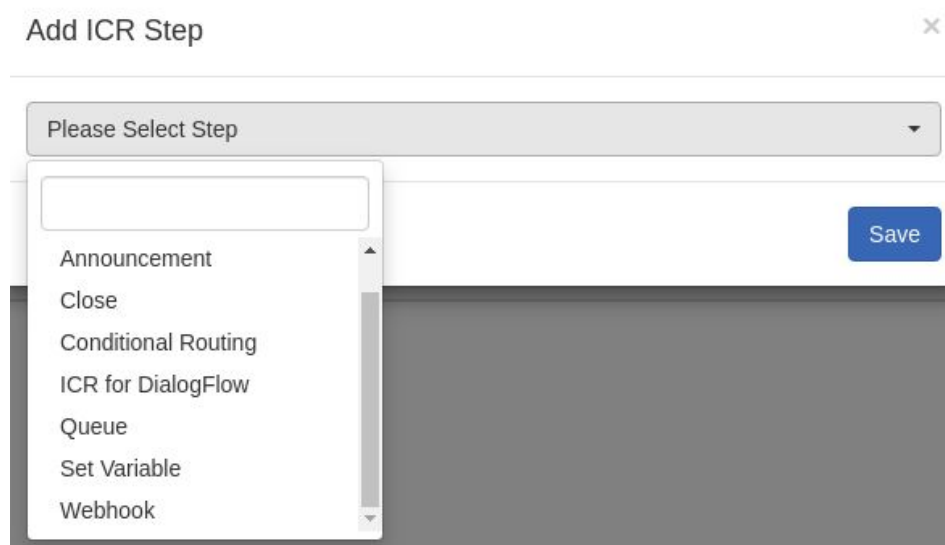
Out of working hours, steps can be used within an ICR to notify the customer that they cannot be transferred to a live agent because it is not within working hours. This step can be used instead of creating time constraints within the Incoming Chat section.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



The image shows a pop-up window titled "Add ICR Step" with a close button (X) in the top right corner. Inside the window, there is a large text input field with the placeholder text "Please Select Step". At the bottom right of the window is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The image shows the same "Add ICR Step" pop-up window, but with the dropdown menu open. The dropdown menu lists the following options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button is still visible at the bottom right.

3. Select the “Out of Working Hours” step from the dropdown list; an example selection is shown below:

Add ICR Step
×

Out Of Working Hours


Save

4. Click the “Save” button, , the following will appear on the right-hand side of the screen:

Out Of Working Hours Step Settings


Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Note Input Time (sec)	<input type="text" value="Note Input Time (sec)"/>
Time Out Next Step	<input type="text" value="Please Select Timed Out Step"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Announcement	<div>Announcement</div>
Success Announcement	<div>Success Announcement</div>
Unsuccessful Announcement	<div>Unsuccessful Announcement</div>

Note: The entire selection is not shown. The scroll bar needs to be used to view all the inputs.

-
5. Click the “Step Name” input box, type the desired step name.
 6. Click the “Description” input box, type the desired description.
 7. Click the “Note Input Time (sec.)” input box, type the desired note timeout.
 8. Click the “Time Out Next Step” input box, select from the dropdown menu the desired next step (Note: Previous steps can also be used to show the customer the variable selection again on ICR)
 9. Click the “Announcement” input box, type the desired announcement.
 10. Click the “Successful Announcement” input box, type the desired announcement.
 11. Click the “Unsuccessful Announcement” input box, type the desired announcement.
 12. Click the “Information Email Address” input box, type the desired email address.
 13. Click the “Tag” dropdown box, select the desired tags.
 14. Click the “Save” button, .

Adding Set Variable Step

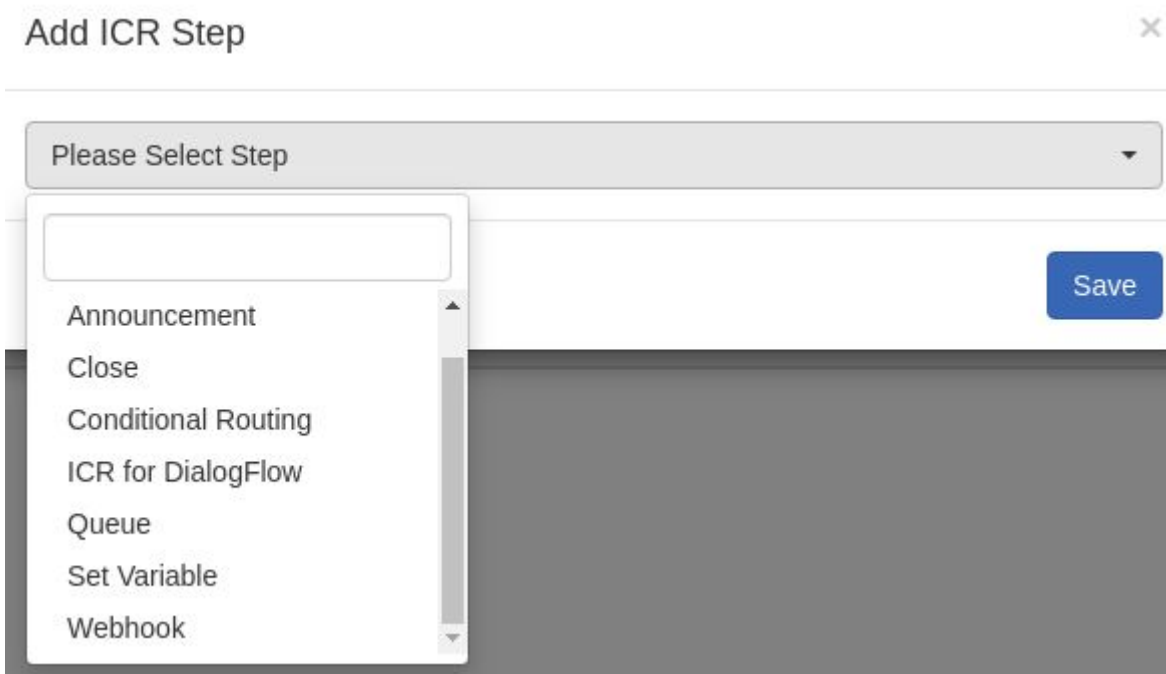
The set variable step is used to create variables for conditional routing.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



A dialog box titled "Add ICR Step" with a close button (X) in the top right corner. Inside the dialog, there is a dropdown menu with the text "Please Select Step" and a downward arrow. At the bottom right of the dialog is a blue "Save" button.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:



The same "Add ICR Step" dialog box is shown, but the dropdown menu is now open, displaying a list of options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains at the bottom right.

3. Select the “Set Variable” step from the dropdown list; an example selection is shown below:

Add ICR Step
×

Set Variable

Save


4. Click the “Save” button, Save, the following will appear on the right-hand side of the screen:

Set Variable Step Settings

Step Name	<input type="text" value="Step Name"/>
Description	<input type="text" value="Description"/>
Set Variable Name	<input type="text" value="Set Variable Name"/>
Set Variable Value	<input type="text" value="Set Variable Value"/>
Set Variable Input Time (sec)	<input type="text" value="Variable Input Time (sec)"/>
Time Out Next Step	<input type="text" value="Please Select Timed Out Step"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Announcement	<div>Announcement</div>
Template Messages	<div></div>

Save

Cancel


5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.
7. Click the “Set Variable Name” input box, type the desired variable name.
8. Click the “Set Variable Input Time (Sec)” (Used as time out period for variable inputs on conditional routing step), type the desired length of time for the timeout (sec).
9. Click the “Time Out Next Step” input box, select from the dropdown menu the desired next step (Note: The previous step can also be used to show the customer the variable selection again on ICR)
10. Click the “Announcement” input box, type the desired announcement (Normally the variable list used in the conditional routing step).
11. Template messages can be added by clicking the “Plus” button  , the following screen will be displayed:

Message To Show




Message To Send

Save

12. When finished, click the “Save” button,  .

Adding Webhook Step

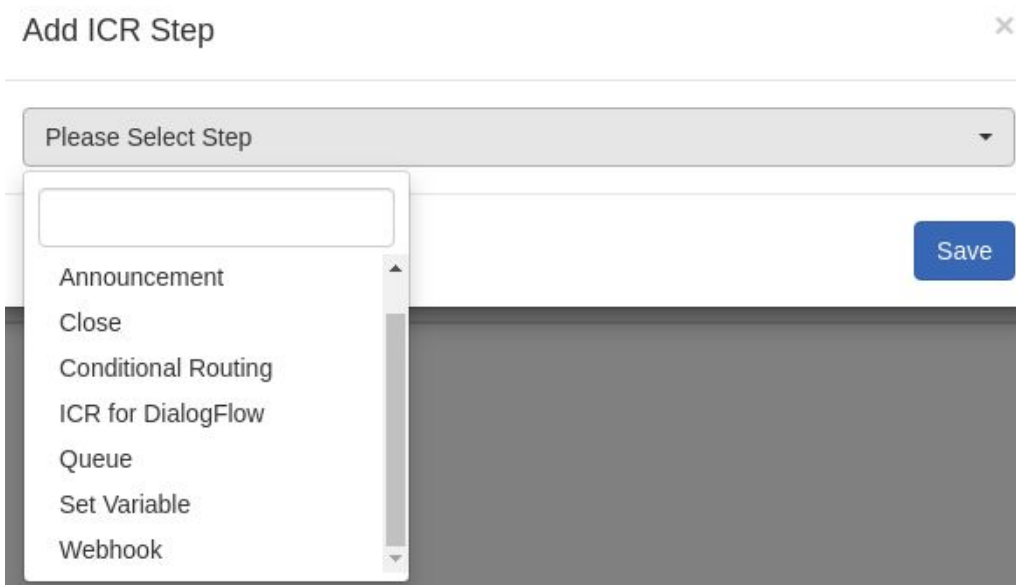
The webhook step is used for sending information to, or for receiving information from a web service.

1. After creating a new ICR, click the “Add ICR Step” button, , in the top right-hand corner of the screen, the following pop-up will appear as shown below:



A pop-up dialog titled "Add ICR Step" with a close button (X) in the top right corner. It contains a dropdown menu with the text "Please Select Step" and a blue "Save" button at the bottom right.

2. Click the “Please Select Step” input box the following dropdown box will appear as shown below:




The same "Add ICR Step" pop-up dialog, but with the dropdown menu open. The menu lists the following options: Announcement, Close, Conditional Routing, ICR for DialogFlow, Queue, Set Variable, and Webhook. The "Save" button remains at the bottom right.

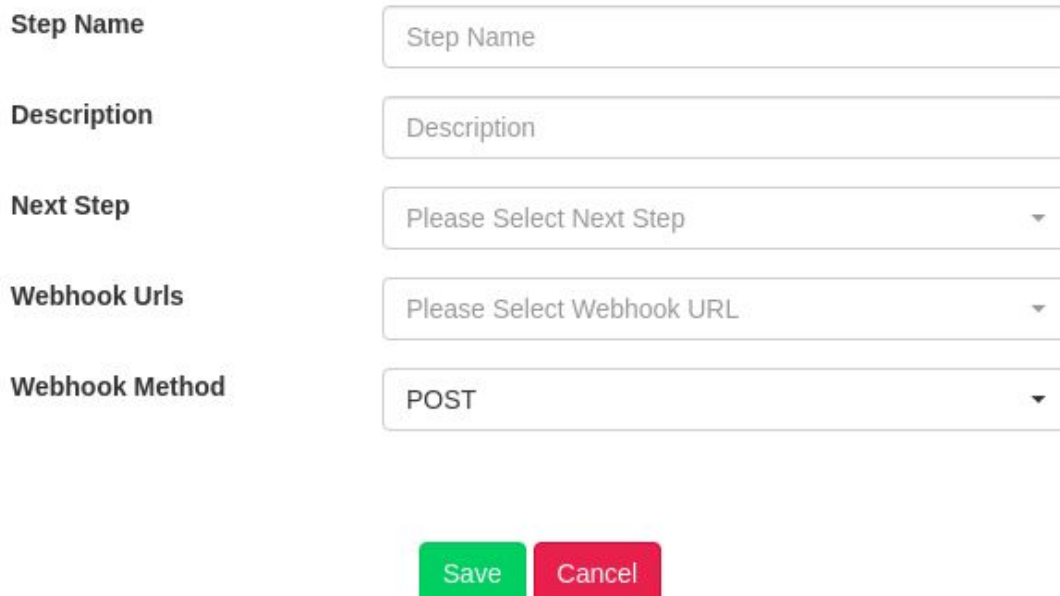
3. Select the “Webhook” step from the dropdown list; an example selection is shown below:



The image shows a dialog box titled "Add ICR Step" with a close button (X) in the top right corner. Inside the dialog, there is a dropdown menu that currently displays "Webhook". At the bottom right of the dialog is a blue button labeled "Save".

4. Click the Save button, , the following will appear on the right-hand side of the screen:

Webhook Step Settings




The image shows a form titled "Webhook Step Settings". It contains five rows of input fields:


- Step Name:** A text input field with the placeholder text "Step Name".
- Description:** A text input field with the placeholder text "Description".
- Next Step:** A dropdown menu with the placeholder text "Please Select Next Step".
- Webhook Urls:** A dropdown menu with the placeholder text "Please Select Webhook URL".
- Webhook Method:** A dropdown menu with the selected option "POST".

At the bottom of the form are two buttons: a green "Save" button and a red "Cancel" button.

5. Click the “Step Name” input box, type the desired step name.
6. Click the “Description” input box, type the desired description.

-
7. Click the “Webhook Urls” dropdown menu, select the desired Webhook URL (Note: Webhook URLs are created in the Web URLs section, See Web URLs for creating a Web URL or talk to the assigned Call Center Studio Project Manager.)
 8. Select the desired “Webhook Method” from the dropdown box.
 9. When finished, click the “Save” button,  .

Editing ICR Step



1. Click the edit button, , located to the right of the “Next Step” a pop-up window will be displayed according to the step type, an example edit for the root step is shown below:

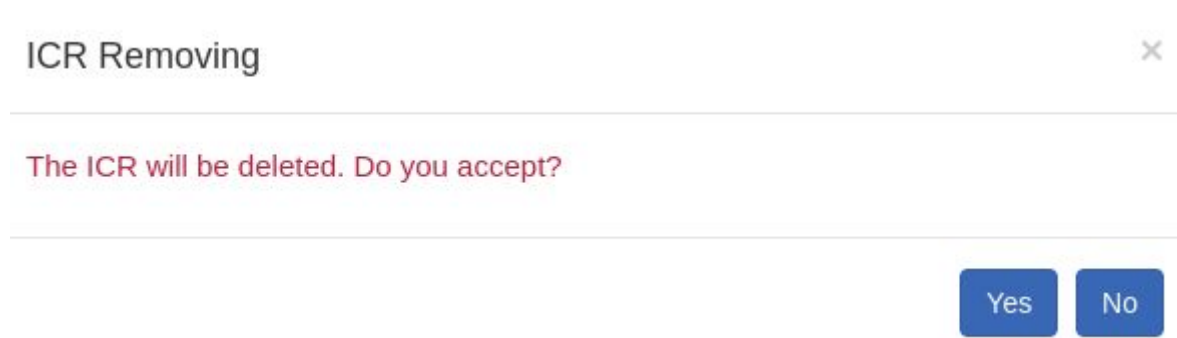
Root Step Settings




Step Name	<input type="text" value="ICR_Root"/>
Description	<input type="text" value="Description"/>
Next Step	<input type="text" value="Please Select Next Step"/>
Announcement	<div><div>Announcement</div></div>
Chat evaluation	<input type="checkbox"/>

2. Make desired changes (See Adding steps for more information)
3. Click the Save button, .

Deleting ICR Step

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



- Selecting the “No” button, , will cancel the deletion.
 - Selecting the “Yes” button, , will confirm the deletion.
2. Confirm the deletion by clicking the “Yes” button, .

The screen will reload, and the deleted ICR step will not be shown.

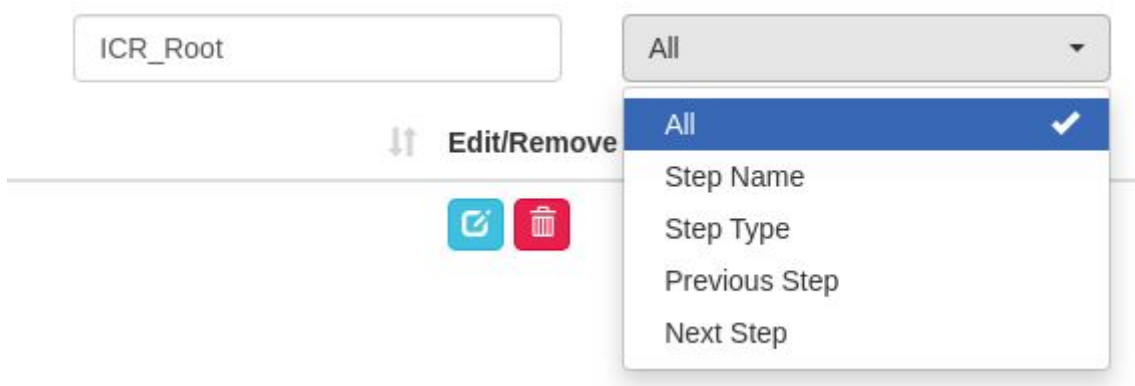
Searching for an ICR Step

There are five ways to search for an ICR step. ICR steps can be searched using the separate filter options or a combination of filter options explained below:

1. Click the search box in the top right-hand corner, type the desired ICR step as shown below:




2. For ease of use ICR steps can be filtered by clicking the dropdown box list as shown below:





3. Filter using the appropriate dropdown selection, to find the desired ICR step.

Editing ICR



1. Click the edit button, , located to the right of the “Create Date” column, after clicking the following pop-up window will be displayed:

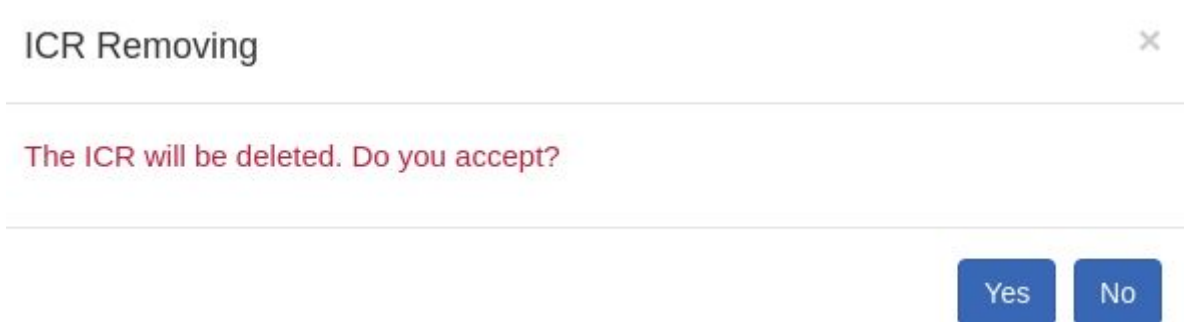
ICR		
STEPS		
Step Name	Step Type	Previous Step
ICR_Root	root	




2. Make changes as desired
3. Click the “Save ICR” button, , located in the top right-hand corner
4. To return to the main menu, click the “Show ICR List” button, , the ICR List screen will appear as shown below:

ICR List		
ICR Name	Step Count	Create Date
ICR	1	2020-04-29 19:58:29

Deleting ICR

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



- Selecting the “No” button, , will cancel the deletion.
 - Selecting the “Yes” button, , will confirm the deletion.
2. Confirm the deletion by clicking the “Yes” button, .

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

Searching for an ICR

1. Click the “Search” input box, type the ICR name as shown below:

Search:

Note: Partial names can be used, when spelled correctly.