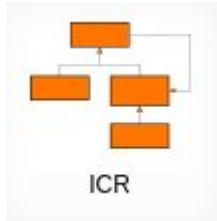# ICR

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, **+Add ICR**, in the top right-hand corner of the screen, the following pop-up will appear as shown below:

ICR Name   ✕

┌──┐
│ ICR Name   │
└──┘

                                                          Save

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

ICR Name   ✕

┌──┐
│ ICR   │
└──┘

                                                          Save

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

ICR

STEPS

Step Name	Step Type	Previous Step
ICR_Root	root	

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

4. 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:

5. 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)

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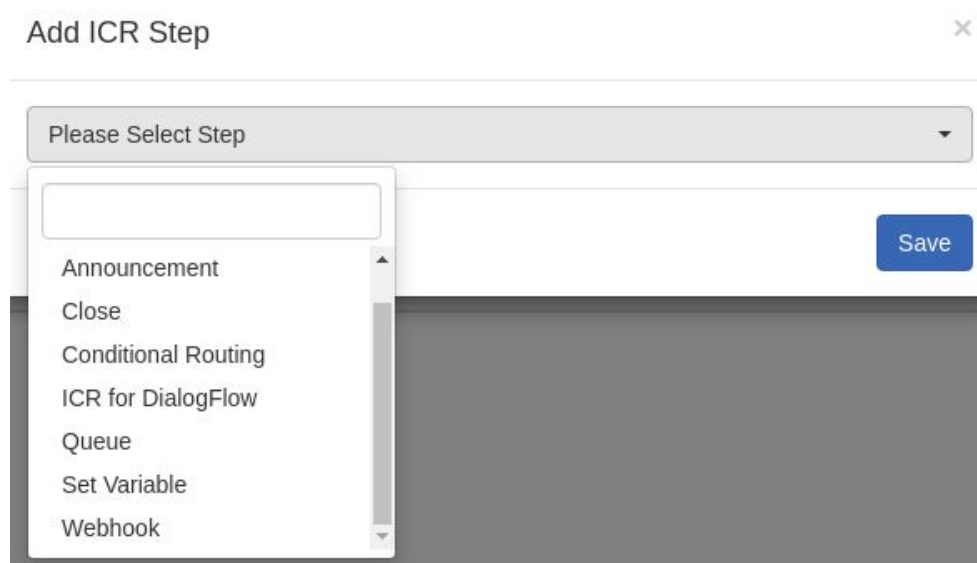
The announcement step is a message that the customer will receive. It can be used in multiple ways, for example, as the next step in a conditional routing selection.

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

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

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, Save , the following will appear on the right-hand side of the screen:
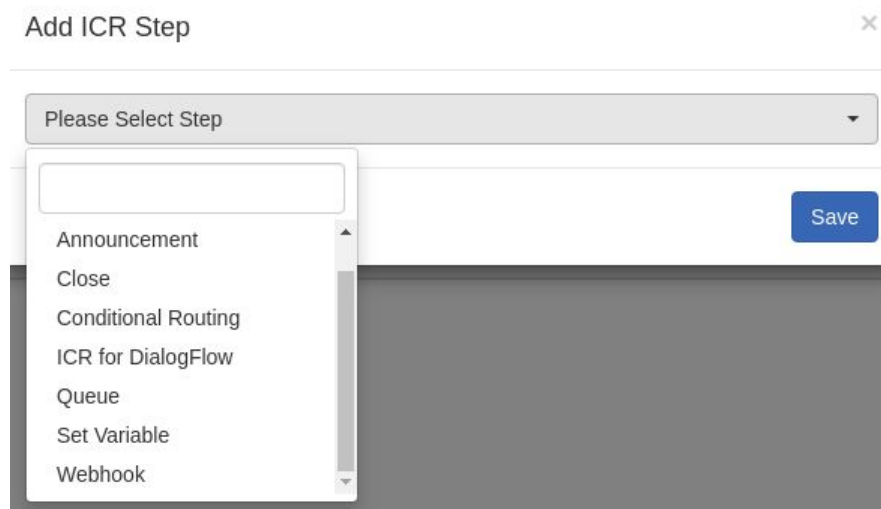
Announcement Step Settings

Step Name   [Step Name]

Description   [Description]

Next Step   [Please Select Next Step ▾]

Announcement   [Announcement]

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, **+ Add ICR Step** , in the top right-hand corner of the screen, the following pop-up will appear as shown below:

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

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

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

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.

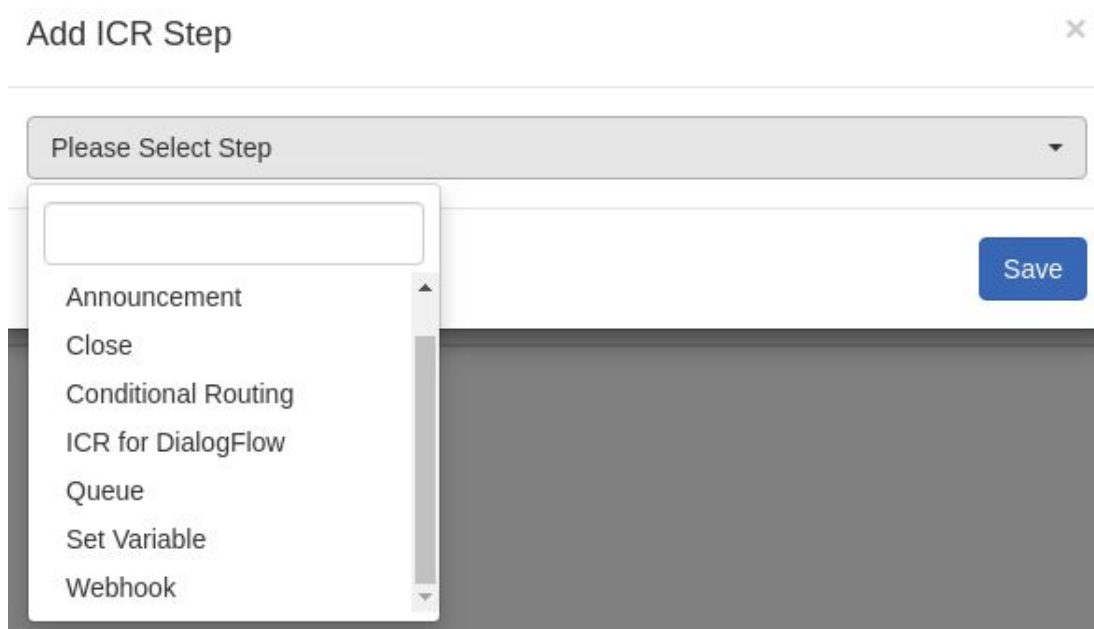8. Click the "Save" button, .

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, **+ Add ICR Step** , in

   the top right-hand corner of the screen, the following pop-up will appear as shown

   below:

2. Click the "Please Select Step" input box the following dropdown box will appear as

   shown below:

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

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

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:

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:

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.

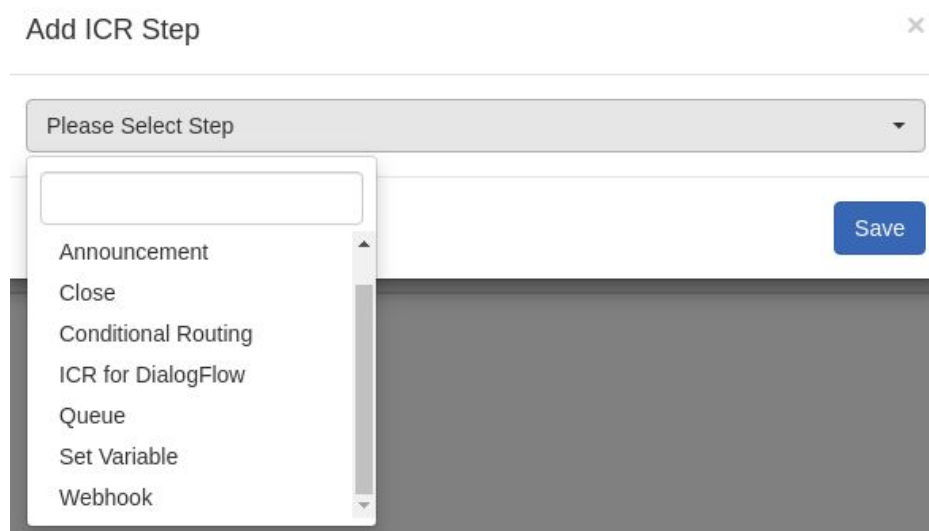12. Click the save button, .

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:

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

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

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

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.

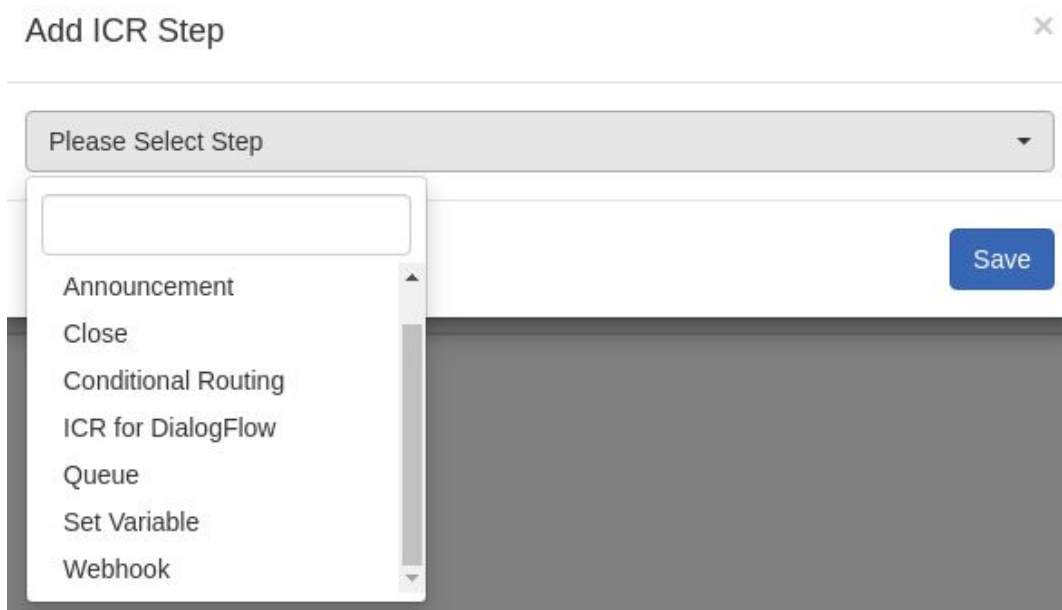13. Click the "Save" button, .

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, **+ Add ICR Step** , in the top right-hand corner of the screen, the following pop-up will appear as shown below:

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

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, **Save**, the following will appear on the right-hand side of the screen:

Queue Step Settings

Step Name	Step Name
Description	Description
Next Step	Please Select Next Step ▾
Queue	Please Select Queue ▾
Enable Reserved Agent	☐
Reserved Agent	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, .
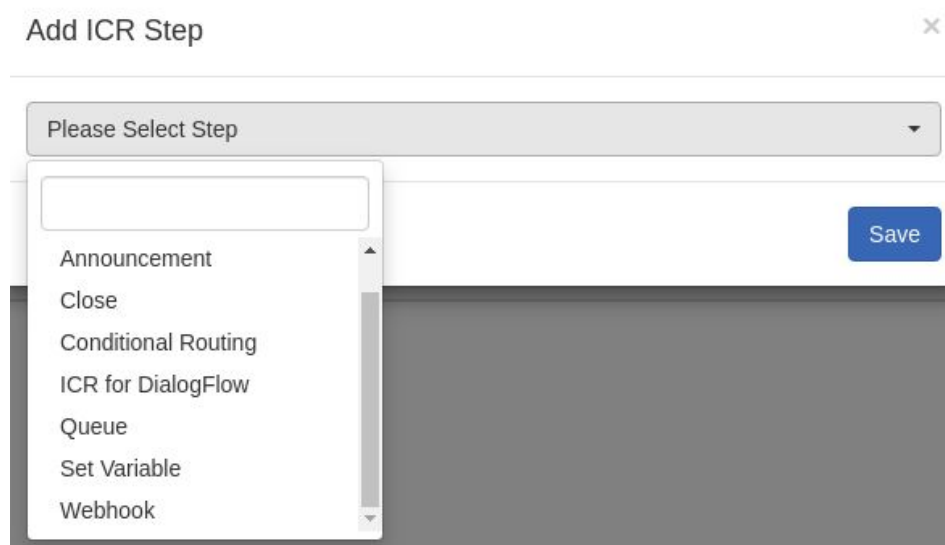
Adding Out of Working Hours Step

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:

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

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

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

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.

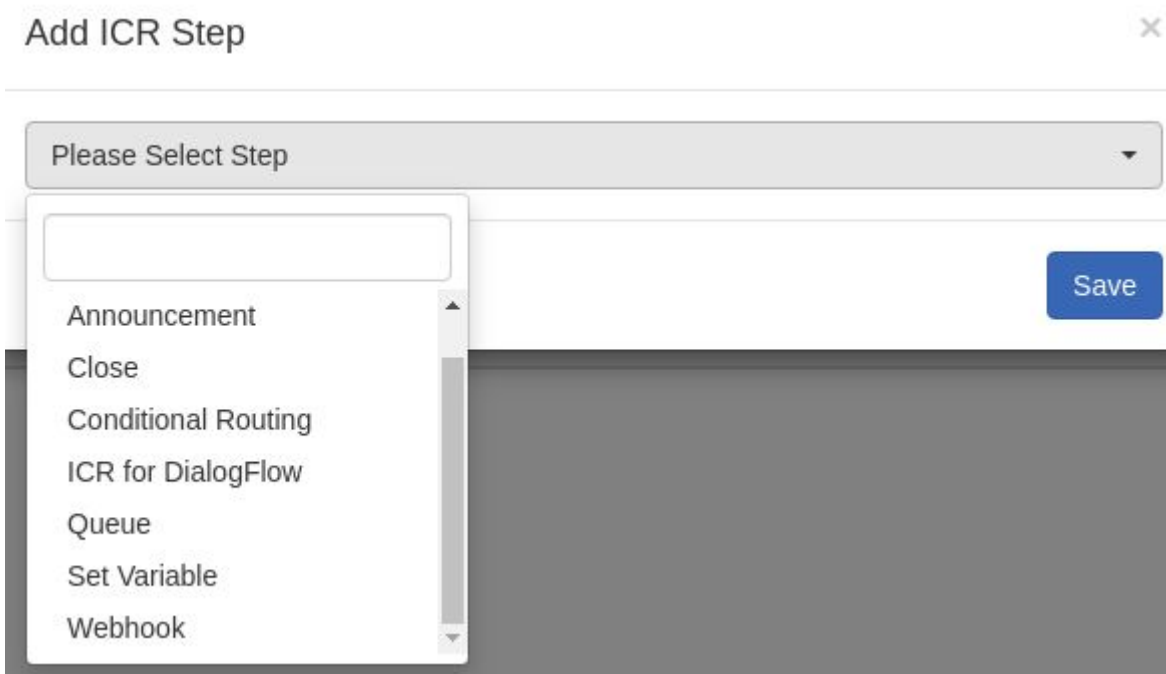14. Click the "Save" button, .

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:

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

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	Step Name
Description	Description
Set Variable Name	Set Variable Name
Set Variable Value	Set Variable Value
Set Variable Input Time (sec)	Variable Input Time (sec)
Time Out Next Step	Please Select Timed Out Step ▾
Next Step	Please Select Next Step ▾
Announcement	Announcement
Template Messages	⊕

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:

12. When finished, click the "Save" button, .
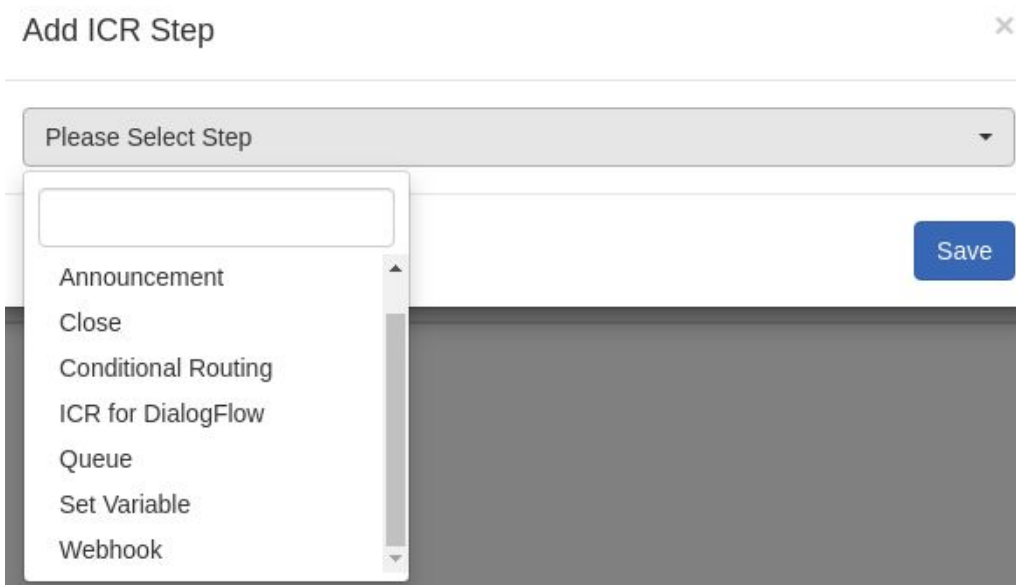
Adding Webhook Step

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, [+ Add ICR Step], in the top right-hand corner of the screen, the following pop-up will appear as shown below:

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

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

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

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	ICR_Root
Description	Description
Next Step	Please Select Next Step ▾
Announcement	Announcement
Chat evaluation	☐

Save   Cancel

2. Make desired changes (See Adding steps for more information)

3. Click the Save button, Save .

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:

   ICR Removing   ✕
   _____

   The ICR will be deleted. Do you accept?
   _____

                                                    Yes   No
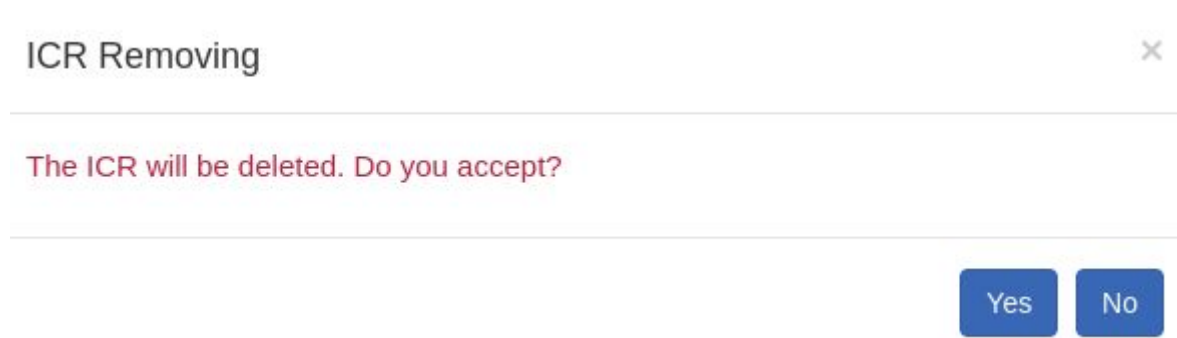
- *Selecting the "No" button, No , will cancel the deletion.*

- *Selecting the "Yes" button, Yes , will confirm the deletion.*

2. Confirm the deletion by clicking the "Yes" button, Yes .

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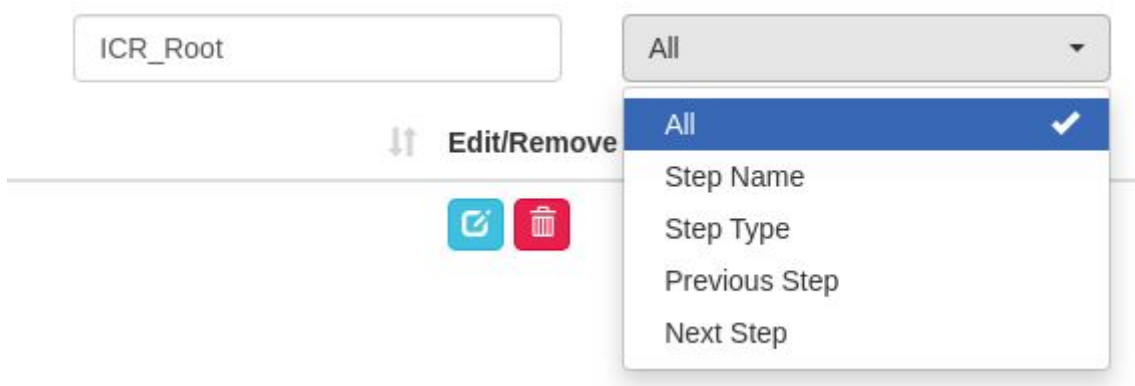
3. Filter using the appropriate dropdown selection, to find the desired ICR step.

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:

ICR Removing   ✕

The ICR will be deleted. Do you accept?

     Yes   No
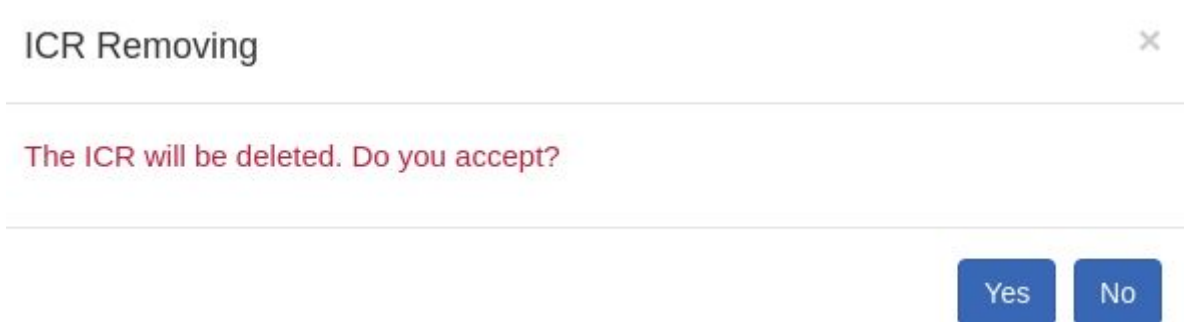
- *Selecting the "No" button,* No *, will cancel the deletion.*

- *Selecting the "Yes" button,* Yes *, will confirm the deletion.*

2. Confirm the deletion by clicking the "Yes" button, Yes .

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: | ICR

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