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Designer User's Guide

SMART Inbound Voice Routing Application

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Contents

- 1 Creating a new application profile
- 2 Creating or editing IVR menu options
- 3 Application resources
 - 3.1 Application
 - 3.2 Shared Modules
 - 3.3 Data Tables
 - 3.4 Business Hours
 - 3.5 Special Days
 - 3.6 Media Resources

The **SMART Inbound Voice Routing** application is a baseline application designed to operate with multiple **profiles** that you can define and manage using Business Controls.

Related documentation:

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At a basic level, the **SMART Inbound Voice Routing** application works as follows:

- A customer calls your contact center.
- The application checks the defined business controls (hours of business, special days, and emergency flags) and plays a corresponding message.
- The customer selects an option from a menu, which the application then uses to route the call to an appropriate agent.

You can use the application "as is", with the default profile, or create and customize additional profiles to offer a unique experience for a particular customer segment or line of business.

The application package includes several Designer object resources, such as shared modules, data tables, and media resources. You can learn more about the resources that are used by the SMART application here.

Creating a new application profile

The application profiles are contained in the **M1 Profiles** data table. While the default profile can be used for many business scenarios, the **SMART Inbound Voice Routing** application is structured to let you quickly create new application profiles that can be customized for your own business needs.

Keep in mind that the new application profile can only support settings that are available for SMART-type applications. It's best if the new application serves a similar business purpose or requires a similar type of flow as the original baseline application.

To create a new application profile, add a new row to the **M1 Profiles** data table and configure the settings for each of the columns. To edit the data table, go to **Business Controls > Data Tables** and select the **M1 Profiles** data table for editing.

Here are some recommendations and guidelines:

Profile ID and Profile Name

These must be unique. The ID could be a line of business (LOB), department name, DNIS, or another unique value that has business significance (for example, don't use the department name as an ID if you are setting up more than one application profile for it). The profile name will be used for reporting purposes, so you should give it a name that distinguishes it from any other profiles.

HOOPS Service ID

If the profile shares HOOPS (Hours of Operation) checks with another profile, you can just reuse the same HOOPS row and specify the ID. If not, add a new HOOPS row to the M1 HOOPS Services data table and specify its ID.

IVR Menu Service ID

If offering a menu, specify its ID from the M1 IVR Menus table. If not, leave it blank.

Routing Service ID

Specify the ID of a Routing Service from the M1 Routing Services table to use if the IVR Menus do not specify a routing service.

Assuming the new application profile uses existing HOOPS, IVR Menus, and Routing Services, it is ready to go. But you will also need to change the application initialization logic to select this newly created profile based on your criteria.

For example, if the profile ID is a DNIS, select the **Assign profile to this session or call** block and set `varMainProfile = DNIS`, as shown here:

The screenshot displays the 'Application Flow' interface. On the left, the 'Initialize' block is expanded, showing the 'Assign profile to this session or call' block. The right pane shows the 'Properties - Assign profile to this session or call' for this block. It includes a description: 'This lookup key will determine how application parameters are retrieved from data tables. Currently it is set to 'default' so that the default row is picked up the data tables and used to drive the application.' Below this are tabs for 'Assignments', 'Sort Function', and 'Advanced Scripting'. The 'Assignments' tab is active, showing a table with two rows:

Variable	Expression	Delete
varMainProfile	DNIS	[Delete Icon]
varVirtualApplicat	varMainProfile	[Delete Icon]

For reporting purposes, in the Analytics dashboards, the application profiles are associated with the baseline SMART application, but each profile has reporting data associated with its assigned name.

Creating or editing IVR menu options

To create a new menu service, go to **Business Controls > Data Tables** and select the M1 IVR Menus data table for editing.

Add a new row and specify the **Menu Name**, **Menu Audio**, and **Menu Level**. Set the other values according to how the menu will be used.

For example, if this menu is to be offered if the caller presses 2 from the first-level menu, you would set it up like this:

- In the first-level menu row, set **Menu Options** to use the new menu name. Let's say we've called it **Leasing**.

- In the example below, the **Next Menu** for **DTMF** option 3 has been set to **Leasing**, which becomes the second-level menu. If a caller presses 3 when the first-level menu is offered, they are offered the **Leasing** menu next.

Menu Options ✕

Status	DTMF	Next Menu	Routing Service	Priority	Announcement	Call Data
<input checked="" type="checkbox"/> ON	1	Sales	m1_sales_newvehicles	75	Silence <input checked="" type="checkbox"/>	One: Yes, Two: No <input type="checkbox"/>
<input checked="" type="checkbox"/> ON	2	Service	m1_car_service_routing		N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input checked="" type="checkbox"/> ON	3	Leasing			N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input checked="" type="checkbox"/> ON	4	Fourth	sat_skill		N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input type="checkbox"/> OFF	5				N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input type="checkbox"/> OFF	6				N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input type="checkbox"/> OFF	7				N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input type="checkbox"/> OFF	8				N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input type="checkbox"/> OFF	9				N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input type="checkbox"/> OFF	0				N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input type="checkbox"/> OFF	#				N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>
<input type="checkbox"/> OFF	*				N/A <input checked="" type="checkbox"/>	N/A <input type="checkbox"/>

Cancel
OK

- For this particular scenario, we don't want to specify a **Routing Service** for the **Leasing** option. If we do, the **M1 IVR Menus** module will end and the application will start routing the call according to the specified service. So it is left blank.
- All related menus must have the same **IVR Service ID**, so make sure that both the first-level menu option and the newly-defined second-level menu option have the same **IVR Service ID** value. Otherwise, they will not be treated as related menu levels.

Application resources

The following Designer objects are included as part of the SMART Inbound Voice Routing application package:

Application

- **SMART M1**

This is the main application. The flow has been structured to provide some of the most common functions of a Designer application, such as calling modules to check for various conditions (like holidays or emergencies), offer self-service menus, and route calls to designated targets, while still allowing for some customization.

Shared Modules

Shared modules are smaller application "chunks" that work with their related data tables to perform various functions within the main application, such as checking for certain conditions, offering menus, or routing calls.

- **M1 HOOPS Checks**
Checks for various conditions that can trigger an early-exit from the application. For example, it checks if there is an emergency flag, a holiday, or if the call is outside the scheduled hours of operation.
- **M1 IVR Menus**
Presents a series of menu choices to a caller and then routes the call according to how the caller responds.
- **M1 Routing**
Used for routing a call to an intended target (such as a **Skill Expression**, **Agent Group**, or **Direct Number**).

Data Tables

Data tables contain data values that are used by the related modules and other application objects. You can edit the data tables directly to add or make changes to various options.

M1 Profiles

Each row in this data table is a *profile* that influences how the application behaves and processes the incoming call. You can think of a profile as being like a *virtual application*, as each application profile will handle calls in a different way. To add a new application profile, simply add a new row to this table (see Creating a new application profile).

Display Name	Column ID	Description
Profile ID**	profile_id	Internal ID for uniquely identifying a profile. This can be a string, a VQ name, or the DNIS. (There is a default profile already created.)
Profile Name	profile_name	The application profile name. This name helps to distinguish the various application profiles for reporting purposes.
Profile Description	profile_description	Description for this profile.
HOOPS Service ID	hoops_service_id	ID of the HOOPS Service defined in the HOOPS data table.
Default Menu Service ID	menu_service_id	ID of the IVR Menu Service defined in the IVR Menus data table.
Default Routing Service ID	routing_service_id	ID of the default Routing Service defined in the M1 Routing data table. This is used if the selected IVR Menus don't define their own

Display Name	Column ID	Description
		routing service.

M1 HOOPS Services

This data table contains early-exit criteria objects, typically related to Business Controls settings. For example, it specifies which message to play when a call is received during an emergency, a holiday, or outside of the defined business hours.

Display Name	Column ID	Description
HOOPS Service ID**	hoops_service_id	Internal ID for uniquely identifying this service.
Emergency Flag	emergency_flag	Boolean value that indicates whether or not there is an emergency.
Emergency Message	emergency_message	Emergency message.
Open Hours	business_hours	Points to a business hours object.
Closed Hours Message	business_hours_message	Specifies the message to be played if the current time is outside the defined business hours.
Holidays	special_days	Points to a special days object.
Holidays Messages	special_days_message	Message to be played if the current date is a holiday.
Queue Music	music_in_queue	(Reserved for future use.)

M1 IVR Menus

This data table contains multiple levels of nested menus that are offered to callers in the Self Service (IVR) phase. Each menu can enable DTMF options 1-9 and take one of the following actions for the selected option:

- Go to another menu, as per the target menu you've specified in the option settings, or
- Start routing the call, as per the routing service you've specified in the option settings.

Display Name	Column ID	Description
IVR Service ID**	ivr_service_id	ID for the IVR Menu Service.
Menu ID**	menu_id	Unique ID of a Menu within a Menu Service.
Menu Name	menu_name	User-friendly name for the Menu.
Menu Description	menu_description	Description of what the Menu does.
Menu Level**	menu_level	Numeric value indicating the nesting level of a Menu. The first (or top) level is 1.

Display Name	Column ID	Description
Menu Audio	menu_audio	Announcement to be played that will offer the Menu.
Menu Options	menu_options	Options and actions for this menu.
Menu Type	menu_type	(Reserved for future use.)

M1 Routing

This data table controls routing services, and contains definitions of multiple routing attempts, each of which can route to a different type of target (such as a **Skill Expression**, **Agent Group**, or **Direct Number**).

Display Name	Column ID	Description
Routing Service**	routing_service_id	Unique name for the routing service. Keep in mind that multiple attempts will have the same service if the attempts are related.
Routing Attempt**	routing_attempt	Integer indicating the attempt number. Attempts are made in increasing order.
Routing Option	routing_type	Type of routing. This must be one of Skill , Direct Number , or Agent Group . The exact string is required.
Skill Expression	routing_skill	Skill expression for routing.
Agent Group	routing_agent_group	Agent Group for routing.
Direct Number	routing_direct_number	Agent Group for routing.
Voice Mailbox	routing_voicemail	(Reserved for future use.)
Virtual Queue	virtual_queue	Virtual Queue for routing.
Queue Music	music_in_queue	In-queue audio.
Duration	routing_duration	Duration for routing attempt.

Business Hours

- **Main Office Hours**

The business hours are predefined as Mon-Fri, 9 AM to 5 PM.

Special Days

- **Office Holiday**

The special days are predefined with a list of US holidays.

Media Resources

These include multiple audio files, as contained within the **Shared Audio** collection found under Media Resources.

Important

The SMART M1 application does not include any Speech Grammars.