IVR – Interactive Voice Response

Interactive Voice Response (IVR) technology allows you to automate voice interactions with your leads and customers. Businesses today use IVR to conduct phone surveys, confirm appointments and deliveries, qualify and route inbound callers, and much more. With your Ifbyphone account there is no limit to the number of IVRs you can create and modify.

This jumpstart will walk you through the basic steps to creating a new IVR. Following this walkthrough is an appendix that provides additional information for working with IVRs.

Getting Started

1. Log in to www.ifbyphone.com with your phone number and password. Select IVR from the Advanced Services tab.

2. On the Main IVR page, click New IVR. The Main IVR page also allows you to edit any existing IVRs, delete your IVRs, clone (copy) existing IVRs, as well as lock, import, or export an IVR. For more information on these functions, please see the Appendix.

For assistance, call the Ifbyphone Customer Success Team at 877-295-5100.
3. From the Edit IVR page you will build your IVR, including establishing the settings, setting up the greetings, and creating and configuring the questions. To begin, give the IVR a name and a description (optional). Note: The IVR will automatically save your changes as you move from field to field.

Settings

4. Next you need to configure some basic settings that will apply to the entire IVR application. You will configure:

- **Text to Speech**: Within an IVR you can upload or record your own voice for the audio or type in text that the computer will read using a simulated voice, known as text-to-speech (TTS). If you will be using TTS you can select:
  - Gender: Specify if the generated voice should be in the male or female vocal range.
  - Speed: How quickly should the computer read the text you have entered.

- **Speech Recognition**: Enabling speech recognition allows your respondents to respond to the IVR with their voice or by pressing a key on their phone keypad. If speech recognition is disabled, respondents must use their keypad only to respond to the IVR questions.

- **Question Settings**: These settings apply to all the questions in the IVR.
  - Play beep at the end of the question: Check this option to have a tone sounded to alert your respondent that it’s the end of the question.
• **Play entire question before allowing response:** Check this option if you want respondents to hear the entire question before they have the opportunity to respond. This may be especially important for multiple-choice questions or if important information is provided at the end of the question.

• **Send Results to:** Determine how you want to retrieve your IVR results (Note: Unless you specify otherwise under **Advanced Settings**, you can always retrieve your results (report) within the Ifbyphone portal from within the IVR application or under the **Reports** menu):
  - **An email address:** You can have the results of the IVR sent to one or more email addresses. An email will be sent each time the IVR is accessed by a respondent.
  - **My web server:** The results are passed to the designated URL (web address) using HTTP GET or POST. If you select this option you will need to complete the **Webhook Settings** section.

**Greetings**

5. After you have finished selecting your IVR settings, you need to configure **Greetings**. A greeting is the first message that your respondent will hear as part of the IVR. A greeting can be inbound or outbound, or you might not need a greeting.

• **Inbound:** Use an inbound greeting if respondents will be placing a phone call into the IVR, or if they will be transferred in from another application like Call Distributor.
• **Outbound**: Use an outbound greeting if you will use this IVR along with a voice broadcast to have the system place calls to your respondents. By using voicemail detection you can ensure our system leaves the entire message on an answering machine and, if you desire, allows you to deliver one message to a live person and a different message to be left on answering machines. There are two different types of voicemail detection:
  o **Automatic**: This is the most widely used voicemail machine detection. An algorithm determines if the call is answered by a live person or a voicemail and plays a different message based on that determination. Once the system determines that a live person has been reached, it plays the appropriate greeting and then moves to the first question in your IVR. When an answering machine is detected, the system waits for a period of silence before playing the voicemail message and disconnecting. **Note**: Due to the variation in the way that different answering machines work and different phone carriers handle voicemail, automatic voicemail detection may not always achieve 100 percent accuracy.
  o **Manual**: In the manual version of voicemail detection, the respondent is presented with a prompt to determine if the system has reached a live person or a machine. In your own words, you will prompt the respondent to press any key if they are a live person. If a key is pressed, the respondent will hear the live person greeting and then the system will move to the first question of your IVR. If no key is pressed, it is assumed an answering machine has been reached at which point the system waits for a period of silence before playing the voicemail message and disconnecting.

• **No Greeting**: In some instances you may not need a greeting, such as if respondents are entering this IVR from another IVR or if they are being transferred in from a live agent who will provide the greeting.

6. Once you have specified which kind of greeting you need, enter the script for the greeting. You can use the following options for the greeting:
   • **Text to Speech**: Enter the script that the system will read to the respondent
   • **Recorded Audio**: If you choose recorded audio, you have three options for providing the audio:
     o **Uploaded Audio**: You can select a WAV audio file from your computer and upload it.
     o **Call to Record**: Once you complete your IVR, use the *Call to Record* button to have the system call you and batch record all the greetings and questions you marked as *Call to Record* in one single session similar to recording your outgoing voicemail message. If using *Call to Record*, we recommend that you enter the script for the audio, as the system will read that to you during the call.
Questions

7. Once your greetings are configured you can add questions to build your IVR. Click the Add Question button to begin. A question has four parts:

- **Label**: A short name for the question to identify it within the application and within your reports.
- **Message**: The script that will either be read to the respondent using text-to-speech (TTS) or the audio file that will be played. If you are uploading audio files it is not required to add a message script, but if you are using Call to Record to
create your audio files we recommend that you enter the script as the system will read your script to you during the recording process.

- **Question Type:** Ifbyphone offers a variety of question types to allow you to receive responses from your respondents in both structured and unstructured formats. The types include:
  - *Message Only:* Question text or audio is played without expecting a response. This type is widely used for the last question of an IVR to thank your respondents.
  - *Message with Action:* Plays the question text or audio for the respondent. If the respondent presses a key during the message you can take one action and if the respondent does not press a key take a different action.
  - *Yes/No:* Respondent will answer either Yes or No.
  - *Multiple Choice:* Respondent will choose one of several answer choices. If you are using voice recognition, the text in an answer choice field is what the system is listening for to make the selection. For instance, the system will say, “Press 1 or say Sales” if you enter “sales” for the first answer choice. To re-order answer choices, you can grab the gray 4-way arrow symbol to the left of the choice number and drag the choices to a new order.
  - *Recorded:* Respondent is prompted to record their answer. You can specify how long to allow for the recording in seconds. It is recommended that you limit recordings to 30 minutes (1,800 seconds) or less. To indicate the end of a recording, the user can pause for several seconds or press the # key. Recorded answers are available for playback when reviewing the IVR results from the Ifbyphone portal. You may also transcribe these recordings (additional charges apply). See the Transcriptions FAQ for more information.
  - *Date:* Respondent is expected to enter a date. If using the telephone keypad to enter the answer, use YYYY/MM/DD format. It is suggested that you include these format instructions in your question text or audio.
  - *Time:* respondent is expected to supply a valid time. If entered via the telephone keypad, the response should be in military format (00:00 - 23:59). If spoken, the response should be in twelve-hour format including AM or PM (e.g. “one PM”). It is suggested that you include these format instructions in your question text or audio. If using Confirm Response, a response of "13:00" is read back as "one PM."
  - *Digits:* Expected response is numerical digits. If using Confirm Response, a response of "123" is read back as "one, two, three."
  - *Number:* Expected response is any number. If using Confirm Response, response of "123" is read back as "one hundred twenty three."
  - *Phone Number:* Expected response is a 10-digit number. If using Confirm Response, response of "8772955100" is read back as "eight, seven, seven, two, nine, five, five, one, zero, zero."
- **Currency**: Expected answer is in the form of currency in dollars (no cents). If using Confirm Response, response of "50" is read back as "Fifty dollars."

- **Next Action**: Signifies what you want the system to do after the completion of the question – in some cases after the respondent answers the question and in some cases after the system plays the message. You may select one of the following actions:
  - **Next Question**: The system will simply move to the next question in the IVR.
  - **Depends on Response**: Depends on Response allows you to have the system perform a different action based on the answer of the respondent. Note: this action is only available for question types of yes/no and multiple-choice.
  - **Transfer Call**: Routes the respondent to the specified phone number. With Transfer Call you can also specify some advanced transfer settings. See the Appendix for more information.
  - **End Call**: Disconnects the respondent from the call. We recommend that to gracefully end the call you should use a Message Only question type before a Next Action of End Call, allowing you to thank the respondent.
  - **Go to Another App**: Routes the respondent to a Virtual Receptionist, Find Me List, Ifbyphone Voice Mail, Call Distributor, or another IVR. Upon selecting this type, the drop-down menu expands, allowing you to choose which application to route to.
  - **Go to (Question Label)**: Sometimes known as "skip," this action allows you to send a respondent to a different question within your IVR after making a particular selection or after a particular prompt is played.

**Record Audio (if needed)**

8. If you specified any questions or greetings as **Call to Record**, the next step after you have added in all the questions for your IVR is to record the audio for those questions/greetings. Click the **Call To Record** button to begin.
9. In Call To Record mode, the screen highlights the questions that you need to record by outlining them in green. Enter your phone number and click Call Me. The system will call you at this number and walk you through recording each question or greeting.

10. Once you have finished recording all the questions/greetings, simply hang up and the audio files will be automatically loaded with the appropriate question and the audio type will be updated from Call To Record to Uploaded Audio.
If you need to re-record any question. Simply change the question back to Call To Record and click the Call To Record button again.

Test Your IVR

11. The final step to complete your IVR is testing it to ensure that it functions the way you intended. Click Test and enter a phone number. You will be called on this number and connected to the IVR. This is equivalent to calling into an inbound IVR or receiving an outbound IVR as a voice broadcast.

Once you have finished editing your IVR you can connect it to other Ifbyphone applications to allow respondents to access it. For instance:

- Allow customers to call in to the IVR using Phone Routing (Basic Services menu)
- Use the IVR as part of an outbound voice broadcast (Basic Services menu)
- Transfer respondents to the IVR from a call center using Call Distributor (Advanced Services menu)
Appendix

Clones and Templates

To speed up the creation of an IVR you can make a copy (clone) an existing IVR or use one of Ifbyphone’s pre-built templates.

Clone makes an exact copy of the selected IVR. All questions and audio files will be duplicated but not the IVR results. On the Main IVR page, check the box next to the IVR you wish to clone and click Clone. On the Edit IVR page click the Clone button. Enter a name for the copy of this IVR in the pop-up window and click Clone. The cloned copy of the IVR opens and is ready to be edited.

To use a template, go to the Templates page, locate the template you would like to use and click Download Template. Download the template to a location on your computer. Then from the Main IVR page, click Import and select the template file from your computer. You can then begin modifying the template to suit your business needs.

NOTE: Templates are files with the file extension “.json”.

Lock

To protect your IVR once calls are being placed to it, it is a best practice to lock it to prevent accidental editing. On the Main IVR page select the checkbox next to the IVR you want to lock and click Lock. From the Edit IVR page click the Lock button.

Import

Import allows you to import a file and quickly create a new IVR. This might be useful if you have more than one Ifbyphone account and need to recreate an IVR from one account in another account. You can also use import to build an IVR from a template.

To import a file, click Import. On the popup screen click the Choose File button and navigate to the file on your computer. Then click Upload File. Your file will be imported and will open to the edit IVR screen so you can view and modify your new IVR as needed. Note: Imported files must be in JSON format (.json).

Export

Export allows you to save a copy of your IVR locally. This might be useful if (1) you have more than one Ifbyphone account and need to recreate an IVR from one account in another account or (2) you want to create a backup copy of your IVR for safekeeping.

To export an IVR from the Main IVR page, select the IVR and click Export. From the Edit IVR page click the Export button. Navigate to where you want to save the file and give it a name and click Save. Note: exported files are saved in JSON format (.json).
Advanced Transfer Settings

If you specify a Next Action of Transfer Call, you will see an Enable Advanced Transfer Settings checkbox. Advanced transfer settings allow you to determine the call experience for the IVR respondent and the recipient of the transfer.

You can configure:

- **Maximum Call Duration**: Identify how many seconds you want to allow the call to continue.
- **Give One-Minute Warning**: Gives the respondent an automatic warning when there is one minute left before the call will end.
- **Prompt to Accept Call**: Prompts the transfer recipient to accept (press 1 or say yes) or decline the incoming call (press 2 or say no).
- **Time’s Up Message**: Type in a message to play when the maximum call duration has been reached. This field is optional.
- **Whisper Message**: The whisper message will be read to the person answering the call. This field is optional.
- **No Answer Message**: Type in a message to be read to the IVR respondent if the number you are transferring to does not accept the call.
- **Record Call**: Check this box to record all calls that go through this transfer. Please note that recorded calls are charged at 1.5 times the per-minute rate of the call.
For additional assistance, call our Customer Success Team at 877.295.5100 or visit us on the web at www.ifbyphone.com.