>ifbyphone

>>WorkByPhone

Smart Click-to-Call
Advanced User's Guide

Contents

1 What is Smart Click-to-Call?

Using Ifbyphone's building blocks, Smart Click-to-Call allows your customers to directly connect from their phone to you through a versatile Web or Email interface.

By displaying a simple link on your Web site or Email signature, your company has the unique opportunity to enable routed communication between customers, business services and contacts. Through Ifbyphone's Smart Click-to-Call, customers can click a link, type in their phone number, and connect immediately to your company's configured services (commonly referred to as "destinations" or "building blocks" in this documentation). Ifbyphone offers the following services as Smart Click-to-Call destinations: a custom Virtual Receptionist, SurVo voice survey, Ifbyphone voice mailbox, a Find Me auto-dial telephone list to locate an individual, and Click-to-Call for immediate telephony connection.

Smart Click-to-Call is highly flexible in its customization and scalability, as calls can be configured with custom voice forms, menus, mailboxes and Find Me auto-dial lists based on a workplace's schedule. Additionally, your company has the option of selecting any icon, logo or photo to represent your hyperlink. The code used to automatically generate the hyperlink is easily accessible for placement on your Web site or Email signature to facilitate broad distribution.

About the Documentation

The Smart *Click-to-Call Advanced User's Guide* includes the following documentation:

- ☑ Description of Smart Click-to-Call features
- ☑ Smart Click-to-Call basics, including everything that is needed for set up and use
- ☑ Step-by-step tutorials, with screenshots and helpful tips for productivity

ICON KEY	
📄	Note
✋	Warning
☎	Tutorial

Throughout the document, icons are used to indicate important reminders, including tips and common mistakes. Additionally, the telephone symbol denotes the beginning of a tutorial. Tutorials provide step-by-step instructions for setting up Smart Click-to-Call and using it effectively. Screenshots are provided to guide users through the entire process.

Ifbyphone on the Web

Ifbyphone's Web site (www.ifbyphone.com) contains a wealth of information about Ifbyphone business services. Customer service contact information, as well as additional user guides and tutorials, are also easily accessible from the Web site.

NOTE: Naming Conventions

It is important to recognize that a proper naming convention is immensely helpful when tracking schedules, modes, Smart Click-to-Call configurations and destination configurations. Use names that uniquely label your objects in order to distinguish them from one another.

The table below provides an example of a naming convention for Smart Click-to-Call:

Object	Naming Convention
Click-to-XyZ Configuration	"Home Page Click-to-XyZ"
Click-to-XyZ Schedule	"Office Hours Schedule"
Schedule Mode 1	"Open"
Schedule Mode 2	"Closed"
Schedule Mode 3	"Lunch"
Schedule Mode 4	"After Hours"
Virtual Receptionist Destination	"Office VR"
SurVo Destination	"Satisfaction Survey"
Voicemail Destination	"After Hours VM"
Find Me Destination	"Find Manager"
Click to Call Destination	"Call Sales"
Virtual Receptionist Destination Configuration	"Connect to Office VR"
SurVo Destination Configuration	"Connect to Satisfaction Survey"
Voicemail Destination Configuration	"Connect to After Hours VM"
Find Me Destination Configuration	"Connect to Manager"
Click to Call Destination Configuration	"Connect to Sales"

Remember, creating simple, yet descriptive naming conventions facilitates effective use of Ifbyphone's business services, and helps you to avoid communication misfires.

2 Setting Up Smart Click-to-Call

In this chapter, tutorials and step-by-step screenshots are available to quickly and easily guide you through setting up Smart Click-to-Call.

Smart Click-to-Call Components

Each Smart Click-to-Call configuration contains the following components:

- **Smart Click-to-Call Destination:** Designate an Ifbyphone destination (building block), such as Virtual Receptionist or SurVo, to be executed when a particular Smart Click-to-Call configuration is clicked.
- **Schedule:** Build schedules that will moderate Smart Click-to-Call destinations based on the current day and time.
- **Code:** Automatically generate HTML code based on the parameters you choose for a Smart Click-to-Call configuration. Embed the code in a Web page or Email signature for distribution.

Logging in to Your Ifbyphone Account

To set up and use Smart Click-to-Call, you must have an Ifbyphone account. To open an Ifbyphone account, please go to our Web site at www.ifbyphone.com or call (877) 295-5100 and say Business Accounts.

Once your account has been activated, follow the instructions below to login:

1. Navigate to the Ifbyphone Web site at www.ifbyphone.com.
2. Login to your account by clicking **User Login** at the top of the home page.
3. On the **Login to My Account** page (Figure 1), enter your **User ID** (your primary 10-digit phone number—numbers only—with no leading 1) and **PIN** code (password); then click **SIGN IN**.
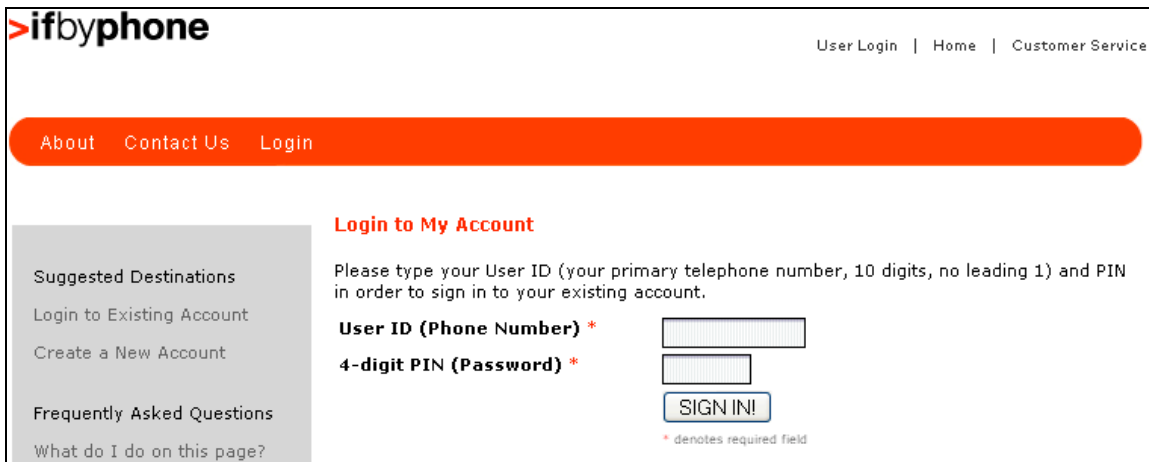

Figure 1: Ifbyphone Account Login Screen

Tutorial 1: Create a Smart Click-to-Call Schedule

The following tutorial will walk you through setting up a schedule for your Smart Click-to-Call. A schedule is an Ifbyphone utility that allows a user to specify the day-to-day operation of a workplace with start and finish times using modes. Within a schedule, it is possible to specify your time zone.

1. Once you have successfully logged into your Ifbyphone account, you will have access to all account settings and business services through the Main Menu page. Enter the **Schedules** utility by clicking the **Schedules** link from the main menu (Figure 2) or by selecting **Tools** on the top menu bar and clicking on **Schedules**.
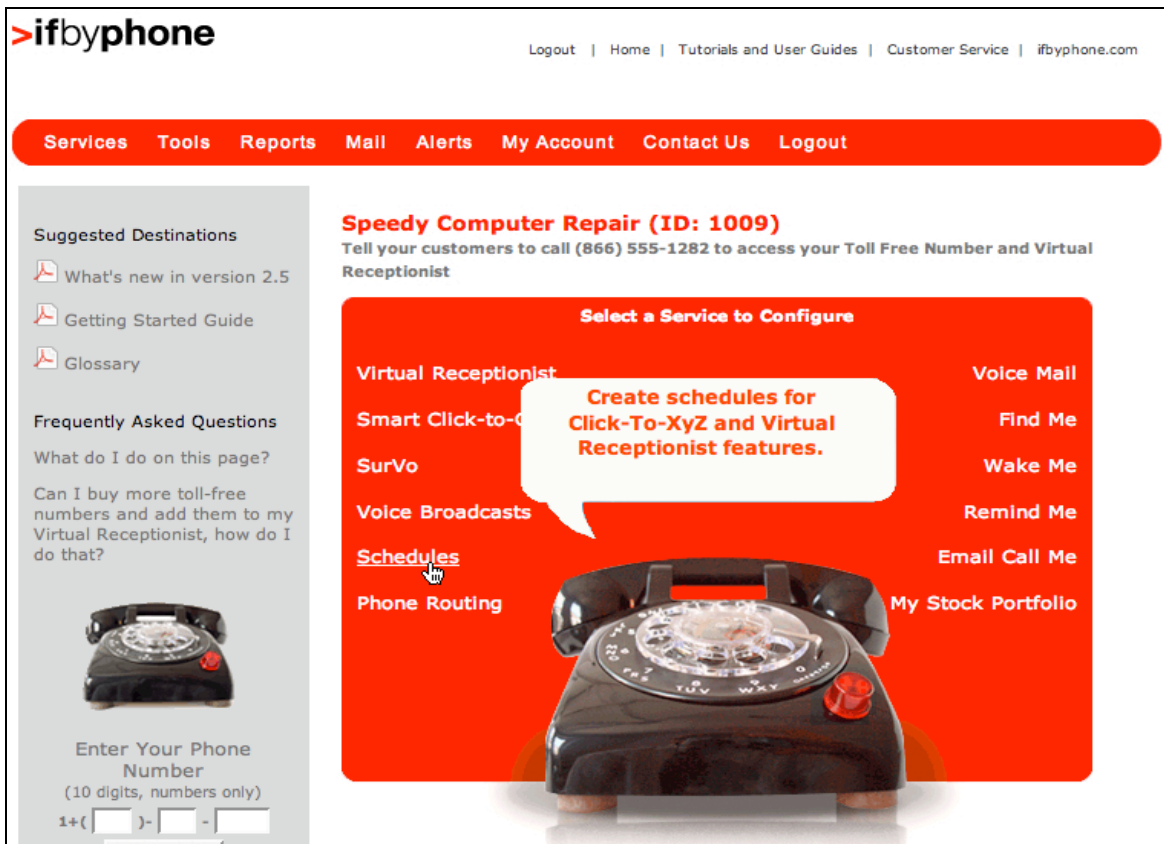
Figure 2: Account Main Menu

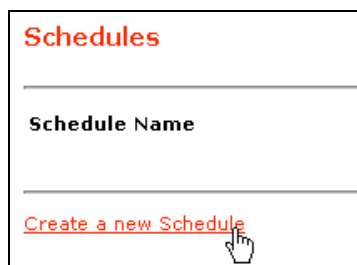2. Click the **Create a new Schedule** link (Figure 3).

Figure 3: Create a New Schedule

NOTE: Why are Schedules Needed?
Vary your Smart Click-to-Call configurations based on a schedule and its corresponding modes. For example, connect to your Virtual Receptionist during business hours; a voice mailbox over weekend hours; and a customized Find Me list of available staff after hours.

3. On the **Schedule Edit** page (Figure 4), enter the requested information into the following fields:

    *   **Schedule Name:** Assign a unique name to the schedule so that you can find it later.
    *   **Timezone:** Select the time zone in which you are located. The time zone field is used to determine the offset between your location and Ifbyphone's servers.

    NOTE: What are Modes?
    Modes are blocks of time established within a specific day. They often represent a workplace's open, closed, lunch and after hours. Once modes have been set within a schedule, Smart Click-to-Call can be configured to exhibit different behavior for each mode. At least two modes must be associated with every schedule.

    *   **Mode 1 Name:** Assign a name to the first mode within this schedule. Enter a descriptive name to facilitate future reference, such as *Business Hours, Weekend Hours* or *Staff Meeting.*
    *   **Mode 2 Name:** Name the second mode within this schedule.
    *   **Mode 3 Name:** Name the third mode within this schedule.
    *   **Add a Mode:** Click this button to add a mode to this schedule. The page will refresh with the new mode.
    *   **Save/Next:** Click this button to save the schedule and continue to the next step.

Figure 4: Schedule Edit

> **WARNING: Active modes cannot be deleted**
> To delete a mode, make sure no time blocks are assigned to it in the schedule, return to the **Schedule Edit** page, rename the mode to **DELETE**, and press the **Save/Next** button (Figure 5).

Mode 3 Name: *	Lunch
Mode 4 Name: *	DELETE
	Add A Mode
	Save/Next
	* denotes required field

Figure 5: Deleting a Mode

Since each schedule must have at least two modes associated with it, you will be prevented from deleting either of a schedule's final two modes.

4. On the **Schedule Configuration** page, the default graphic schedule has normal business hours associated with the first mode and all remaining hours associated with the second mode (Figure 6). The legend on the right side of the page associates a color with each of the modes you designated for this schedule. The **Edit exceptions for this schedule** link allows you to set up an overriding schedule for a single, specific date (described in greater detail within the next paragraph).
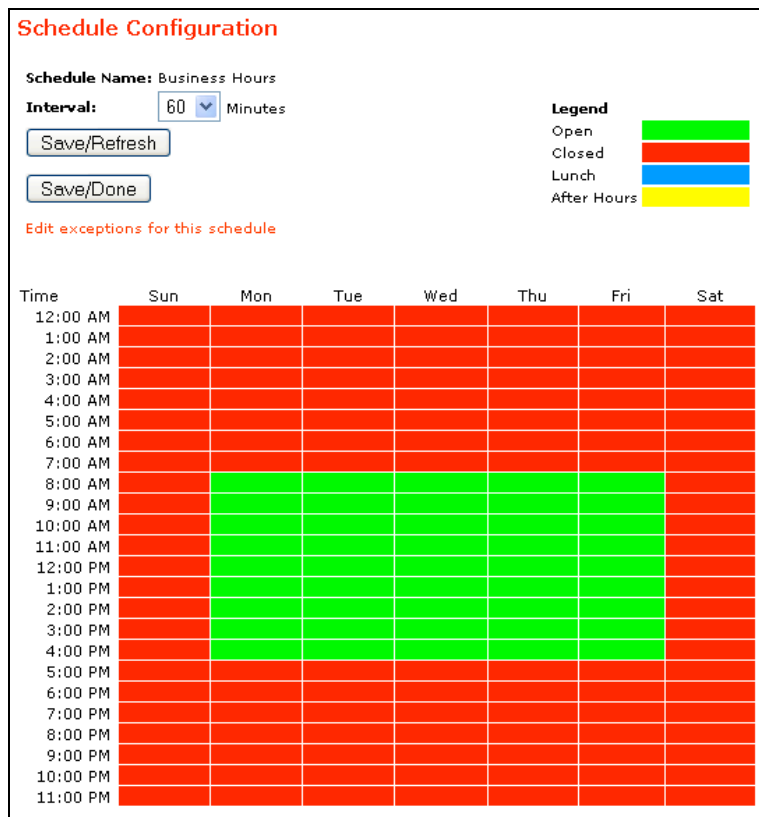
Figure 6: Default Schedule Configuration

To change the mode of a block of time, click on the block. Each click will change the color to the next color on the legend list (Figure 7). The following options are available:

- **Interval:** Select a time interval (in minutes) for the schedule. Note that when changing from a shorter to a longer interval (e.g. from 30 minutes to 60 minutes), details will be lost if the newly combined intervals do not share the same mode. For example, you assign your lunch mode from 12:00 pm to 12:30 pm when the interval is set to 30 minutes. However, if you were to change your interval to 60 minutes, your lunch mode would appear between 12:00 pm and 1:00 pm, since half hours cannot be set in the 60 minute interval.

- **Edit exceptions for this schedule link:** Set up an overriding schedule for a single, specific date, such as a holiday or early closure. Note that exceptions apply to only a single schedule.

- **Save/Refresh:** Press this button to save the information entered thus far, and to refresh the page with new information.

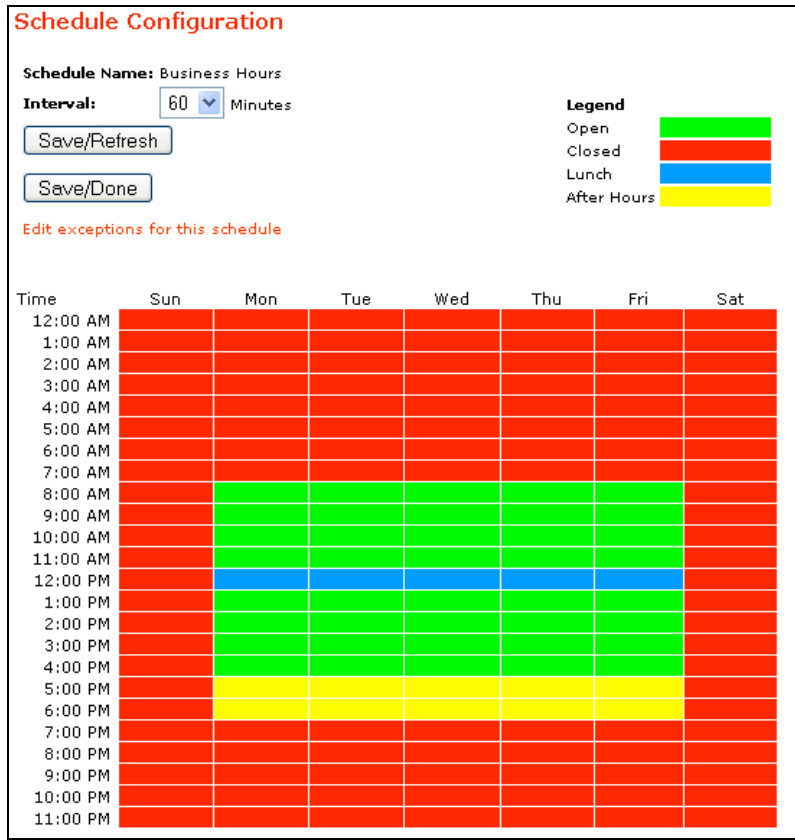- **Save/Done:** Press this button to save the information and complete this schedule.

Figure 7: Schedule Configuration with Multiple Modes

5. Click the **Edit exceptions for this schedule** link to create a new exception, and then click the **Create a new Exception** link (Figure 8). Note that the exception will only apply to the schedule that you are in the process of editing (e.g. Business Hours). The schedule name is noted within the page heading (e.g. **Schedule Exceptions for Business Hours**).
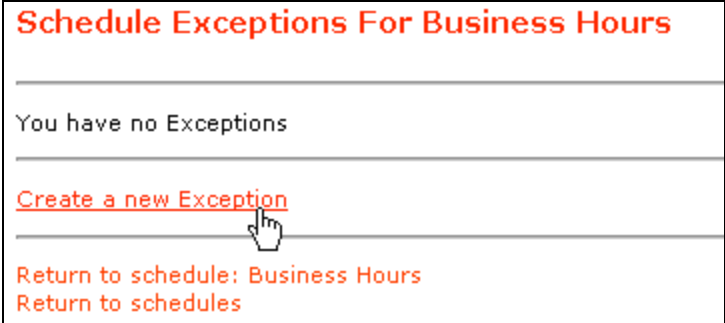
Figure 8: Create a New Exception

6. Select the date of your exception (e.g. the 4th of July holiday) and click the **Next** button (Figure 9).

Figure 9: Select an Exception Date

7. Edit the exception schedule (Figure 10) to reflect your closure or holiday (e.g. route calls to after hours before 3PM; closed after 3PM). The schedule that you create will replace your current schedule on the date that you selected. Click **Save/Done** to continue.
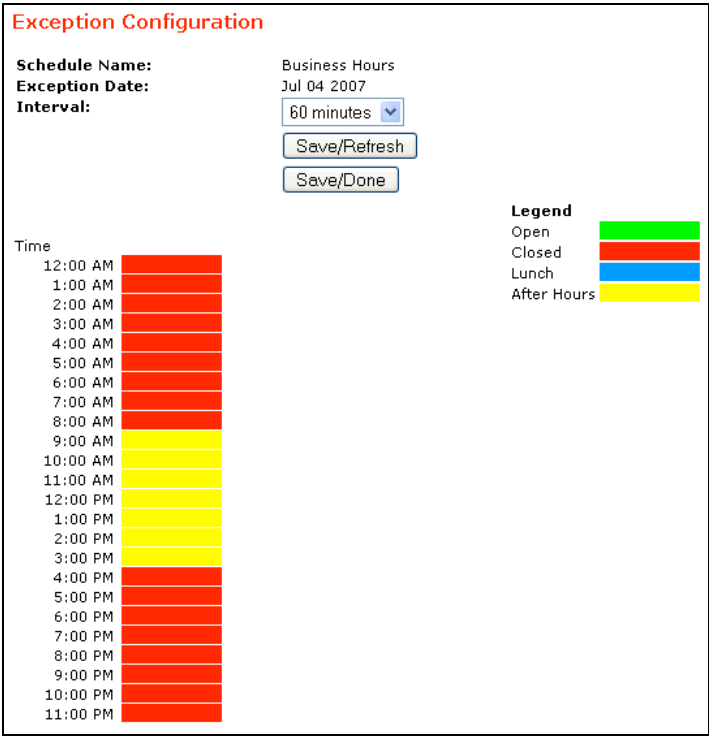

Figure 10: Set the Exception Schedule

8. You can view your new exception on the **Schedule Exceptions** page (Figure 11), as well as any additional exceptions that you add in the future. Existing exceptions are listed with their associated **Edit** and **Delete** buttons.

Figure 11: Exception List

9. Click the **Return to schedules** link to view your new schedule, as well as any additional schedules that you add in the future. Existing schedules are listed with their associated **Edit**, **Delete** and **Override** icons (Figure 12).

Figure 12: Schedule List

10. At any time, you may add a temporary override to your schedule by clicking the **Override** icon. On the **Schedule Override** page (Figure 13), select the overriding mode. For example, if the schedule is currently "Open," select "Lunch" from the drop-down list to indicate an early lunch break. Using the **Hold Override Until…** radio buttons, you may opt to hold the override until you cancel it or until the schedule changes.

Figure 13: Schedule Override

WARNING: You Must Create One or More Destinations to Proceed to the Next Tutorial

As noted in Chapter 1, Ifbyphone offers the following services as Smart Click-to-Call destinations and building blocks: a custom Virtual Receptionist, voice survey (SurVo), voicemail, a Find Me auto-dial telephone list and Click-to-Call.

- **Virtual Receptionist:** An automated menu environment, Virtual Receptionist can transfer callers to other numbers/extensions, forward callers to voice mailboxes, play pre-recorded messages, or route the call to any of Ifbyphone's voice features.

- **SurVo:** Essentially voice-powered, information-collecting "Web forms," SurVos can be used to conduct employment screens, provide a customer satisfaction survey, and route a call based on a user's answers to a series of questions or for any application involving information collection.

- **Voicemail:** Administer Ifbyphone voice mailboxes.

- **Find Me:** Develop and maintain a prioritized list of phone numbers where a call recipient may be reached (e.g. desk or cell phone, pager, etc.).

- **Click-to-Call:** Immediately connect a user to a registered business phone number. Click-to-Call can be easily set up by registering phone numbers—in addition to the toll free number given to you at sign up—within the Registered Numbers utility. The Registered Numbers utility is accessible on the main page's top navigation bar under **Tools** (see the *Appendix* for additional information).

- **Click-to-call w/Info:** Effectively present a Web site visitor with a pop-up box for the purpose of capturing their telephone number and any additional information. The format of the dialog form is controlled completely by you, in that you can add any number of fields, headers, and text blocks. For example, include instructions on how to complete the form or provide a promotional code.

For step-by-step instructions on setting up destinations, please refer to the user guide corresponding to the destination that you wish to create. Please note that the following tutorial assumes that one or more destinations have already been created.

Tutorial 2: Configuring a Smart Click-to-Call

The following tutorial will walk you through configuring a Smart Click-to-Call. A Smart Click-to-Call configuration allows you to associate a hyperlink or graphic on a Web site page or in an Email signature with destinations that have been created and tied to a schedule.

To proceed, one or more destinations must exist. If you have created your destinations, follow the instructions below to set up your Smart Click-to-Call configuration.

1. Enter **Smart Click-to-Call** from the Ifbyphone Main Menu (Figure 14) or the top navigation bar under **Services**.
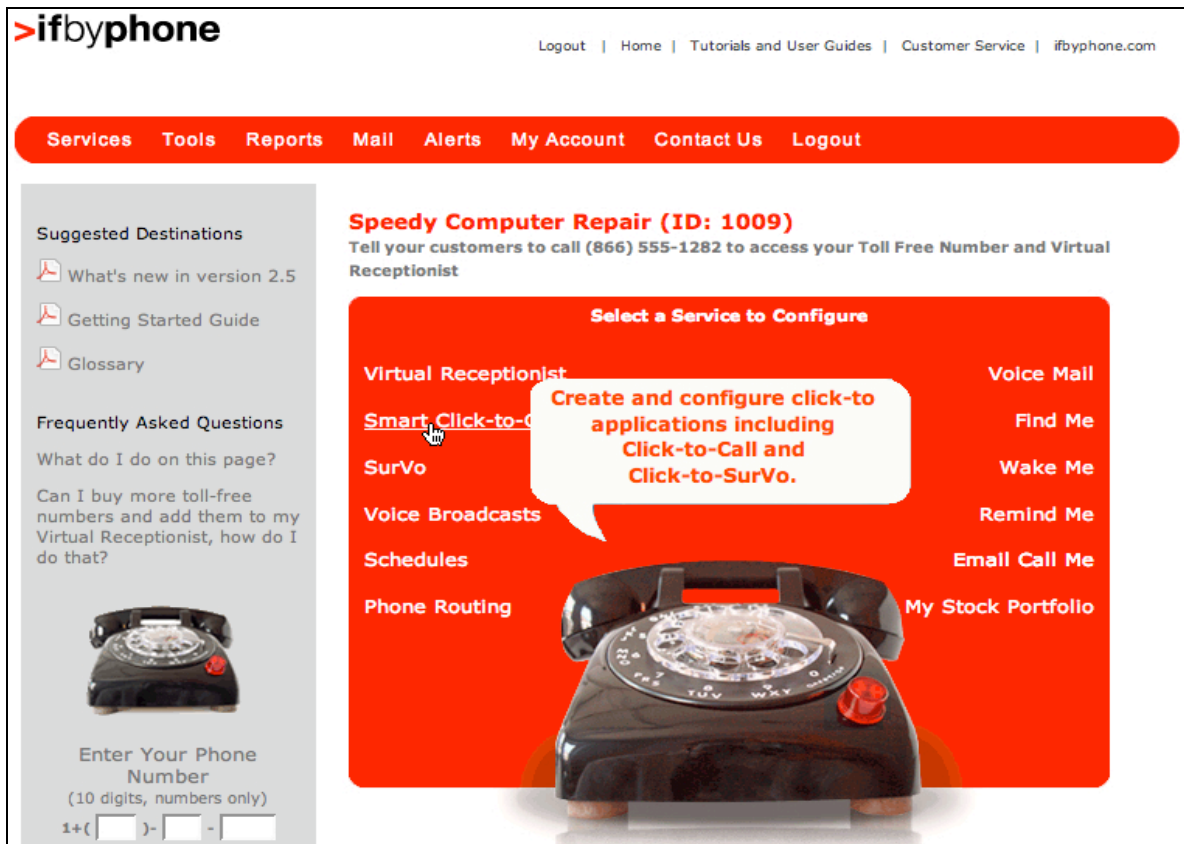
Figure 14: Smart Click-to-Call within Main Menu

2. The **Smart Click-to-Call Configurations** page will appear. To configure a new Smart Click-to-Call, click the **Create a new Smart Click-to-Call Configuration…** link.

>if by phone

Smart Click-to-Call Configurations

A Smart Click-to-Call configuration allows you to associate a link or an icon on a page or in an email with multiple destinations that are tied to the modes in a schedule

You have no Click-to items.

Create a new Smart Click-to-Call Configuration...
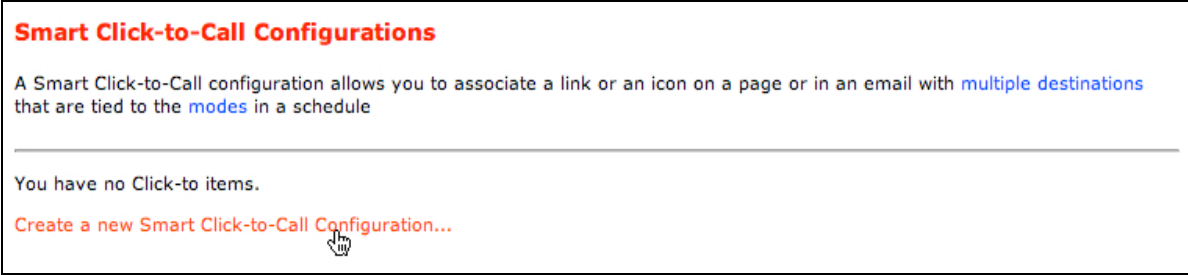
Figure 15: Smart Click-to-Call Configurations

3. Upon clicking the **Create a new Smart Click-To-Call Configuration…** link, the
    Configure Smart Click-To-Call… page appears (Figure 16**Error! Reference source
    not found.**) with the following information fields:

    - **Give this click-to a description:** Enter a descriptive name for the new Smart Click-
      to-Call configuration. Please note that this field is required.
    - **Select schedule:** Choose from one of the previously created schedules in the drop-
      down list. For a Smart Click-to-Call configuration that will perform the same function
      at all times choose the **24x7** schedule. Recall that you may maintain schedules using
      the **Schedules** utility (see *Tutorial 1: Create a Smart Click-to-Call Schedule*).
    - **Show on Clicker's Caller ID:** This is the number that will show up on the Caller ID
      of the clicker.
    - **Show on Your Caller ID:** This is the number that will show up on your Caller ID.
    - **Click to change this image:** You may elect to change the image displayed on your
      Smart Click-to-Call landing/pop-up image. Note that the image change applies only
      to the specific Smart Click-to-Call that you are editing.

   When you have entered the desired information, press the **Save/Next** button to
    continue.

Figure 16: Configure Smart Click-to-Call page

4. Having previously associated a schedule with your Smart Click-to-Call configuration (see *Tutorial 1: Create a Smart Click-to-Call Schedule*), a list of modes will appear for the selected schedule on the **Configure Smart Click-To-Call…** page. Select a Smart Click-

to-Call destination for each mode from the corresponding drop-down menus
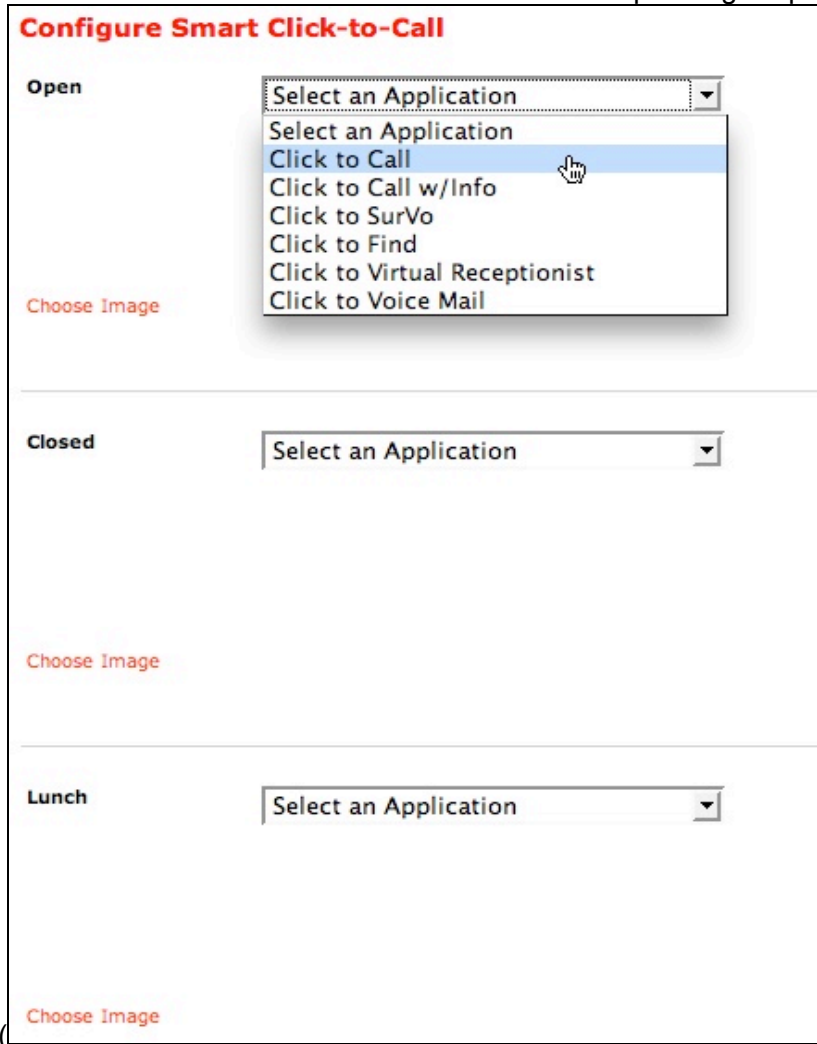
5. Figure 17):

- **Click to Call:** Connect the caller to an assigned phone number (Figure).
- **Click-to-Call w/Info:** Collect important information from a customer before connecting them to an assigned phone number (Figure 19).
- **Click to SurVo:** Connect the caller to an Ifbyphone voice survey (Figure 20).
- **Click to Find Me:** Connect the caller to the designated Find Me list (Figure 21).
- **Click to Virtual Receptionist:** Connect the caller to a Virtual Receptionist menu (Figure 22).
- **Click to Voice Mail:** Connect the caller to an Ifbyphone voice mailbox (Figure 23).

Figure 17: Smart Click-to-Call Destination Configurations

WARNING: Destination for Each Mode
You must configure each mode in your schedule with a destination. If you are using a 24x7 schedule, however, you will only need to create one destination configuration.
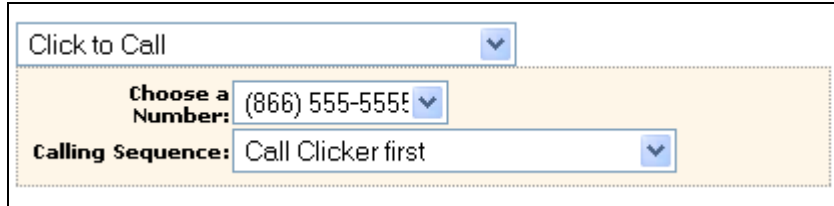
6. As you select a Smart Click-to-Call destination for each mode, complete the configuration process by entering the information described in the following subsections.

Click-to-Call Destination

• **Choose a Number:** Connect the caller to the phone number assigned to you when you first signed up with Ifbyphone or to a phone number registered in the Registered Numbers utility (the Registered Numbers utility is accessible on the main page's top navigation bar under **Tools**). See the *Appendix* for additional information.

- **Calling Sequence:** Select from one of the calling actions below.
  - **Call Clicker first:** First dial the phone number entered by the caller when initiating this Smart Click-To–Call destination. We recommend this approach for basic implementations as this will ensure your customer will receive a phone call.
  - **Call registered phone number first:** First dial the selected registered phone number when initiating this Smart Click-To–Call destination.
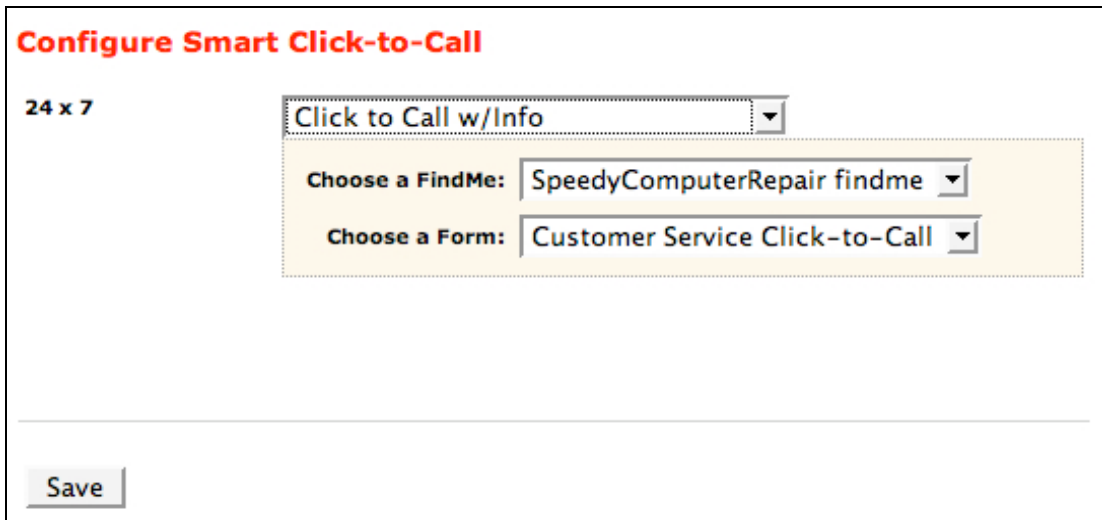
Figure 18: Click to Call Destination

Click-to-Call w/Info Destination

NOTE: A Click-to-Call w/Info box must already be designed to implement this step. for a full tutorial on how to use the Click-to-Call Form Designer.

- **Choose a Find Me:** The screen will dynamically change to allow you to choose a Find Me list (see *Find Me Advanced User's Guide* for more information). Note that a Find Me List is required. If you prefer to send the phone call to one phone number, you can create a Find Me list with a single number.
- **Choose a Form:** There will also be a drop-down box that allows you to choose a Click-to-Call Form. As mentioned above, for information on how to create a Click-to-Call Form.

Figure 19: Select Click to Call w/ Info

SurVo Destination

- **Choose a Survey:** Select from the list of existing Ifbyphone SurVos. When this Smart Click-to-Call destination is initiated, the caller will be connected to the selected SurVo. See the *SurVo Advanced User's Guide* for additional information.
- **After:** Select from one of the completion actions below.
    - **Disconnect Caller:** End the phone call when the user has completed the selected SurVo.
    - **Send to main Virtual Receptionist Menu:** Connect to the Virtual Receptionist default menu upon SurVo completion (see the *Virtual Receptionist Advanced User's Guide* for additional information).
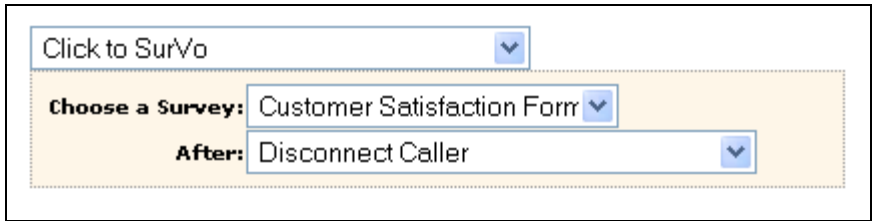
Figure 20: SurVo Destination

Find Me Destination

- **Choose a Find Me:** Select a Find Me from the list (see the *Find Me Advanced User's Guide* for additional information). The Smart Click-to-Call destination will transfer control to the Find Me list upon connection.
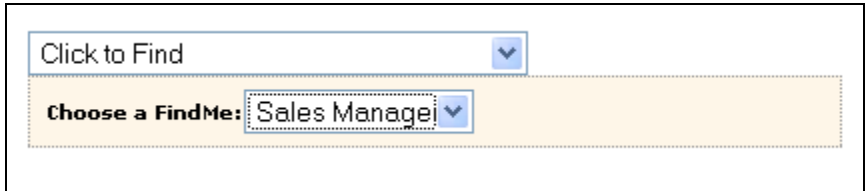
Figure 21: Find Me Destination

Virtual Receptionist Destination

- **Choose a Virtual Receptionist:** Select a Virtual Receptionist menu from the list of existing menus (see the *Virtual Receptionist Advanced User's Guide* for additional information). The Smart Click-to-Call destination will transfer control to the Virtual Receptionist upon connection.
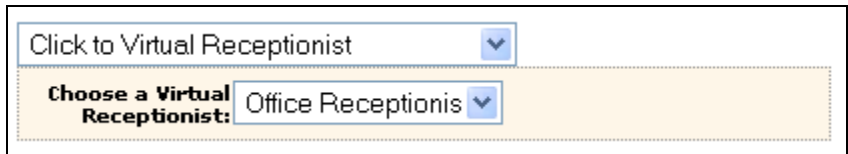
Figure 22: Virtual Receptionist Destination

- **Choose a Mailbox:** Select a target voice mailbox from the list of existing Ifbyphone voice mailboxes (see the *Voicemail Advanced User's Guide* for additional information). When the Smart Click-to-Call application is initiated, the user will be connected to the selected voice mailbox and prompted to leave a message.
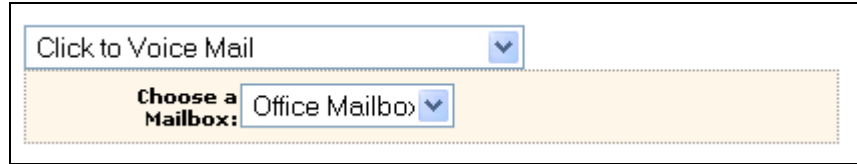
.

Figure 23: Voice Mail Destination

7. Repeat selecting a destination for each mode of your schedule. After associating a destination with each mode of the selected schedule, you may designate an image that will represent the current mode in the Smart Click-to-Call configuration. Click the **Choose Image** link for each mode to choose an appropriate image (Figure 24).
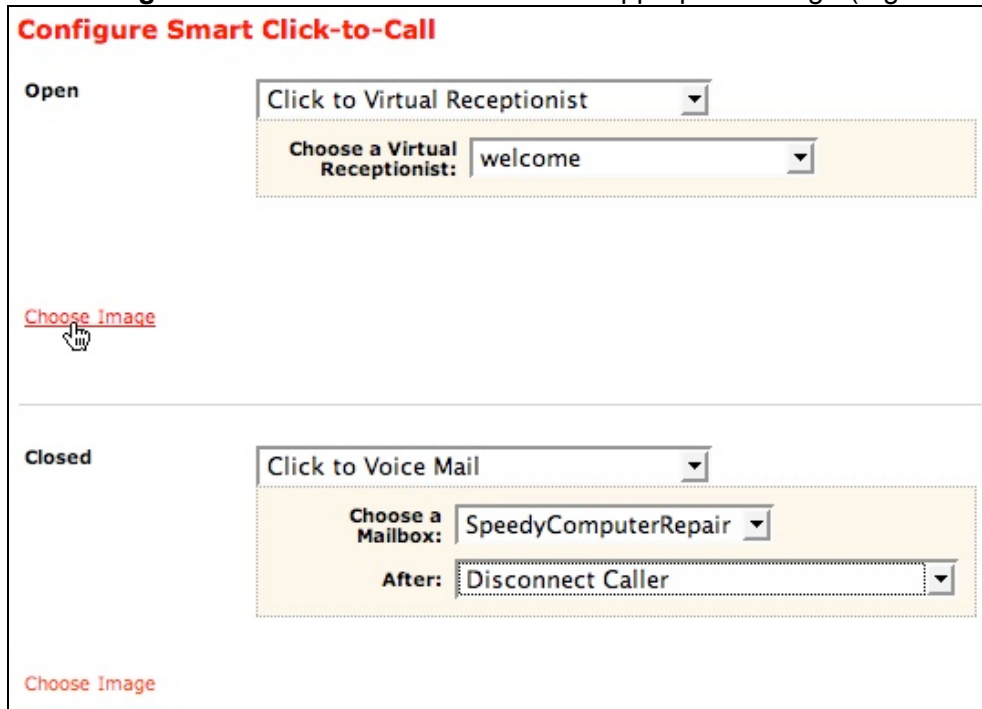
Figure 24: Select Images for Destinations

8. After pressing the **Choose Image** link, the **Click-To Images** page will pop-up with Ifbyphone-supplied images and your uploaded images (Figure 25). You may select any of the stock images on the page or upload your own image.
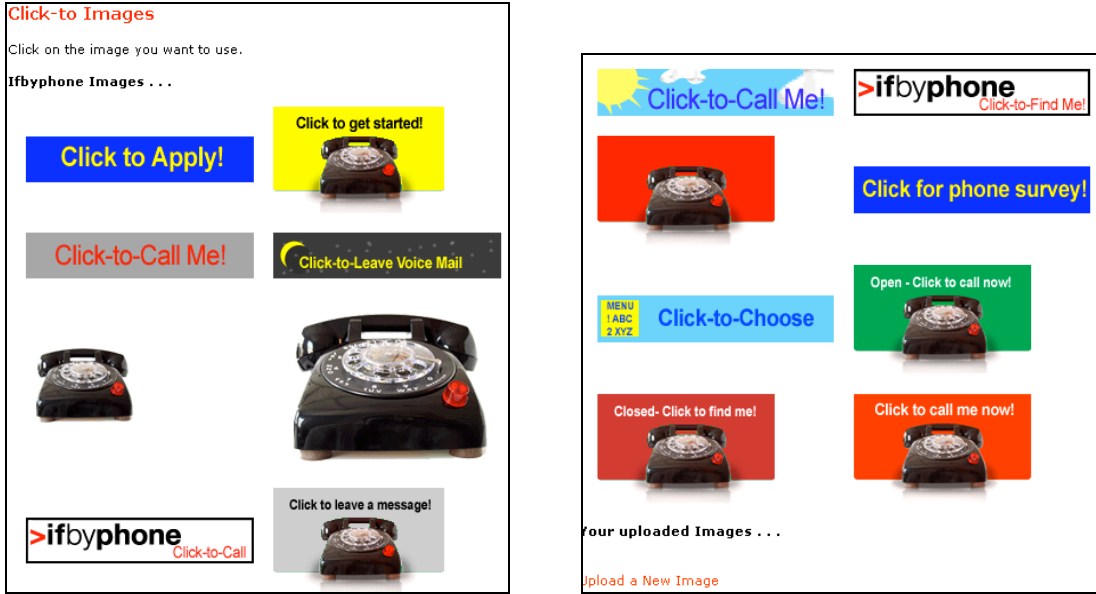
Figure 25: Choose from Images

9. Upon clicking on the image, you will be returned to the **Configure Smart Click-to-Call…** page, refreshed with the newly-selected image (Figure 26).

Figure 26: Stock Image Selection

Alternatively, if you elect to upload your own image, click the **Upload a New Image** link at the bottom of the **Click-To Images** page (Figure 27).

Figure 27: Upload a New Image Link

Browse to an image and click **Upload my Image file** (Figure 28).

Figure 28: Upload a New Image

WARNING: Image Size and Name
Image files must be in JPEG (.jpg or .jpeg) or GIF (.gif) formats. Your uploaded images should be no larger than 300 pixels x 200 pixels. Additionally, if you upload an image with the same name as an existing image, the new image will overwrite the old image. At this time, images may not be deleted by the user.

Any image uploaded at this point will be associated with the mode last selected on the **Smart Click-to-Call…** page (Figure 29).
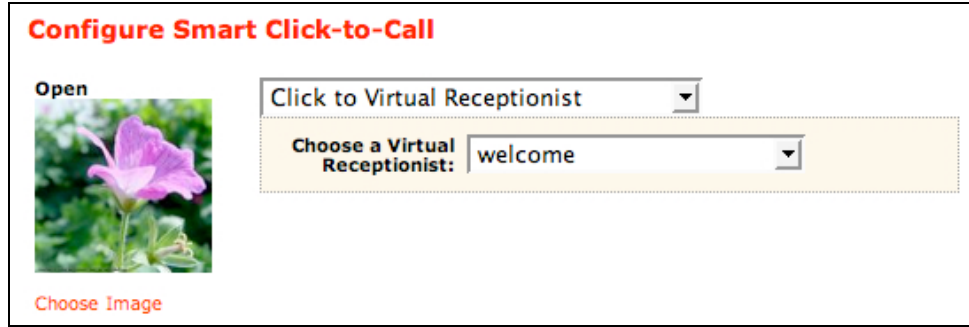

Figure 29: Custom Image Selection

10. When you are finished selecting images for all modes, click the **Save** button. You will be directed back to the **Smart Click-To-Call Configurations** page. All Click-To configurations that have been created will be listed on the **Smart Click-to-Call Configurations** page (Figure 30). Configurations are listed with the following information and icons:

- **Click Description:** Name of the Smart Click-to-Call configuration.
- **Routing:** Identifies how your modes are tied to your destinations.
- **Click Count:** Number of times this Smart Click-to-Call configuration has been accessed.
- **Last Clicked:** Date and time of the most recent click to this Click-To configuration.
- **Edit:** Go back through the steps in this tutorial to edit the selected Smart Click-to-Call configuration.
- **Delete:** Delete the selected Smart Click-to-Call configuration.
- **Test:** Test your Smart Click-to-Call configuration **Code:** View the configuration's associated HTML code (see the next chapter for details).
- **Report:** Review call statistics, volume, usage and data from the Click-to-Call Form for this particular configuration. Additionally, you may export the data to a preferred file format.

Figure 30: Configurations List

3 Implementing a Smart Click-to-Call

Once you have created a Smart Click-to-Call configuration, you can put it into distribution on your Web site or in your Email signature.

To copy the automatically generated HTML code needed for implementation of your Smart Click-to-Call configuration, click the Smart Click-to-Call link from the main menu. Press the **Code** icon alongside the desired object (Figure 31).

Figure 31: Code Button

The **Smart Click-to-Call Code Choose Wizard** page will display (Figure 32). In the **Where will the Smart Click-to-Call be used** field, select from one of the following options:

- **Web page:** The Smart Click-to-Call configuration will be embedded in HTML Web pages.
- **Email or Email signature:** The Smart Click-to-Call configuration will be used within an Email message or as the Email signature (See the Imbedding a Smart Click-to-Call in your *Email Signature Advanced User's Guide* for more information)

Additionally, if the **Use dynamic images based on schedule** box is checked, an image will be associated with each of the schedule's modes. If you associated multiple images to modes in the previous step, check this box now.

Press the **Next** button to continue to the next step of Smart Click-to-Call code generation.

Figure 32: Smart Click-to-Call Code Choose Wizard

Based on whether you selected Web Page or Email/ Email Signature from the drop-down list, you will be able to view and copy the respective code snippets for placing links in either one of these mediums. In addition, there are two options for further image customizations:

- **To see/use other Ifbyphone Click-To images:** Change the image for the active mode.
- **To use your own image on the landing and status pages:** Select a new image for use in the pop-up browser window (Figure 33).
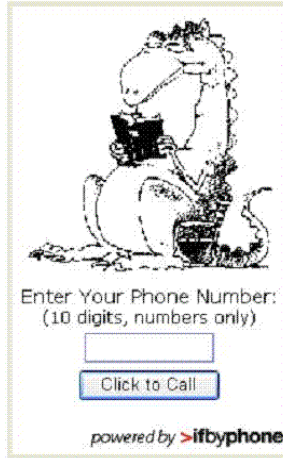

Figure 33: Custom landing page

Complete the process by copying the code contained in the following subsections.

Web Page Click-To Code Options

The code possibilities for Web page Smart Click-to-Call configurations are as follows:

> **NOTE: Dynamic Images**
> If you chose in the previous step to use dynamic images based on schedule, the code below reflects that choice, and displays an image based on the currently active mode of your schedule.

- **Image Pop-up (HTML/Javascript):** Copy this code to put a text/graphic link on your Web page that opens up a new, small window for phone number capture (Figure 34). Since the Ifbyphone page opens in a new, small browser window, the user's current browser page remains unchanged.

Figure 164: Image Pop-up

- **Input Box (HTML/Javascript):** Copy this code to put an input box and button on your Web page for entering a phone number (Figure 35). When the button is pressed, a small browser window displaying a page from the Ifbyphone Web site will open. Since the Ifbyphone page opens in a new, small browser window, the user's current browser page remains unchanged. The Ifbyphone page displays the status of the call Ifbyphone places to the telephone number input.

Figure 35: Input Box

- **Just the URL:** Copy this code to put a simple URL on your Web page for initiating the Click-to-XyZ (Figure). Some WYSIWYG Web page builders may request only the URL.

Figure 36: Just the URL

- **Input box (AJAX):** This choice places an input box on your Web page that uses a server proxy to relay the Smart Click-to-Call request for handling (Figure 37). To use this method, the appropriate proxy for your server must be installed. This method leaves the user's current browser page remains unchanged. Contact Ifbyphone Business Services for guidelines on implementing this method.

Figure 37: AJAX

Email Click-To Code Options

The code possibilities for Email Smart Click-to-Call configurations are as follows:

- **Link (HTML):** Copy this code to place a text link in an Email or Email signature (Figure 38). When clicked, a new page appears with a field for the phone number Ifbyphone will call upon submission.

Link (HTML)

Click to Call

Code for placing a link on your page or in an Email signature. The user will be redirected to a new page on the ifbyphone site where they enter their phone number. To use just the link, for example in the body of an Email, just copy/paste the portion between the quotes " "

```
<a href="http://www.ifbyphone.com/clickto_getphone.php?click_id=98">Click
to Call</a>
```

Figure 38: Link

- **Image Link (HTML):** Copy this code to create an image link for placement in an Email signature (Figure 9). When clicked, the link brings up a new page with a field for the phone number Ifbyphone will call upon submission.

Image Link (HTML)

Click to call me!

Code like above but uses an image for the link rather then text (you can edit or remove the text portion of the link).

```
<a href="http://www.ifbyphone.com/clickto_getphone.php?click_id=98">Click
to call me!<br><img
src="http://www.ifbyphone.com/images/clickto/blinking_phone_100.gif"
style="text-decoration:none;border:0"></a>
```

Figure 39: Image Link

NOTE: Advanced Smart Click-to-Call Techniques
Using Smart Click-to-Call advanced programming techniques, you can trigger calls through Web sites on the Ifbyphone system. Please see the *API (Phone Mashup) Developers Guide* for additional information.

4 Ifbyphone Glossary

The purpose of the glossary is to assist you by defining commonly-usedIfbyphone terms.

Auto attendant
Another term for Interactive Voice Response (IVR). Essentially refers to an automated telephone answering system that routes calls.

Building Block
Ifbyphone proprietary code that allows you to build a complex voice application that is accessible via the Web, Email or telephone. Smart Click-to-Call and all destinations are building blocks.

Click-to-Call (CTC)
Immediately connect a user to a registered business telephone number. Click-to-Call can be easily set up by registering phone numbers—in addition to the toll free number given to you at sign up—within the Registered Numbers utility. Click-to-Call can then be configured as a destination for Smart Click-to-Call, enabling Web site visitors to click a button and immediately speak with a customer service representative or other call recipient.

Destinations
Destinations are Ifbyphone services/building blocks that can be configured for Smart Click-to-Call access. Through Smart Click-to-Call, customers can click a link, type in their phone number, and connect immediately to a destination.

Destination Configurations
Destination Configurations allow you to setup a destination for use with a specific Smart Click-to-Call.

Interactive Voice Response (IVR)
A computerized system that allows a telephone caller to select options from a voice menu and interact with the computer phone system. IVR systems use Dual Tone, Multi-Frequency (DTMF) signals (entered from the telephone keypad) and natural language speech recognition to interpret the caller's response to IVR prompts.

Find Me
An Ifbyphone building block and destination, Find Me can be configured to maintain a prioritized list of phone numbers where a call recipient may be reached (e.g. desk or cell phone, pager, etc.). If a call recipient cannot be located at any of the phone numbers listed, the call can be redirected to their voice mailbox.

Modes
Blocks of time established within a specific day when configuring a schedule. Modes are fully customizable, but are commonly used to represent a workplace's open, closed, lunch, and after hours. Once modes have been set within a schedule, Smart Click-to-Call and Virtual Receptionist can be configured to exhibit different IVR behavior for a specific mode.

Net Integration
Communication between a SurVo and Web-based server. Net integration may be carried out to retrieve or post information and to perform a function like user account validation. Typically net integration is performed when a company is utilizing Ifbyphone business services to add voice to an existing system.

Schedule
An Ifbyphone tool that allows a user to specify the day-to-day operation of a workplace with start and finish times. Schedules are configured for ifbyphone building blocks, including Smart Click-to-Call and Virtual Receptionist. Within a schedule, it is possible to specify a desired time zone, as well as modes.

Smart Click-to-Call
An Ifbyphone building block that is highly flexible in customization and scalability, Smart Click-to-Call enables routed communication between customers, business services and contacts via the Web or Email. Through Smart Click-to-Call, customers can click a link, type in their phone number, and connect immediately to a company's configured services (commonly referred to as "destinations" in this documentation). Ifbyphone offers the following services and building blocks as Smart Click-to-Call destinations: a custom Virtual Receptionist, voice survey, voice mailbox, a Find Me auto-dial telephone list to locate an individual, and Click-to-Call for immediate telephony connection. Smart Click-to-Call can be configured based on the day and/or time of day.

Software as a Service (SaaS)
A software model employed by vendors who both develop and operate network-based applications for use by customers over the internet. SaaS is typically a low-cost way for businesses to obtain the same benefits of commercially licensed, internally-operated software, without the associated complexity and high initial cost.

SurVo
See Voice Survey Form (SurVo)

Virtual Receptionist
An Ifbyphone building block and destination, Virtual Receptionist can be configured to provide menus for callers to route incoming calls. An automated phone environment, the virtual receptionist can transfer callers to other numbers/extensions, forward callers to voicemail boxes, initiate a Find Me list or surveys, play pre-recorded messages, etc.

Voice Form
Similar to a Web form—with voice recognition capabilities, a voice form is a dialog between a user and the system configured to provide or collect information. At the completion of a voice form, the information collected can be emailed, saved to a web site or transmitted for further processing.

Voice Survey Form (SurVo)
An Ifbyphone building block and destination, Voice Survey Forms (SurVo) are used to create dialogs over the telephone between callers and the system, much like a Web form with voice recognition capabilities (see Voice Form). A SurVo can be used to conduct employment screens, provide a customer satisfaction survey, route a call based on a user's answers to a series of questions, etc. SurVos have the potential to be invoked in response to a Smart Click-to-Call, an inbound call, an outbound call, a scheduled call, or an API request from a Web site.

VoiceXML
W3C's standard XML format for specifying interactive voice dialogues between a human and a computer. VoiceXML allows voice applications to be developed and deployed for visual applications. Analogous to HTML interpretation by a visual Web browser, VoiceXML documents are interpreted by a voice browser. VoiceXML has tags that instruct the voice browser to provide speech synthesis, automatic speech recognition, dialog management and soundfile playback.

VUI (Voice User Integration)
Describes the interaction with computers though a voice and/or speech platform to initiate an automated service or process.

World Wide Web Consortium (W3C)
An international consortium, hosted by MIT, which develops interoperable technologies (standards, protocols, software and tools) for the Web. W3C's mission is to promote the evolution of the Web in a single direction, rather than into splintered factions.

5 Appendix

The Appendix defines processes and steps that are useful, although not essential, to setting up Smart Click-to-Call.

Registering Phone Numbers

Smart Click-to-Call destinations can connect to either your Ifbyphone account number or to a phone number that you register for use in a Smart Click-to-Call application.

You may register phone numbers for use by accessing the **Registered Numbers** utility on the **Tools** section of the Ifbyphone navigation bar (Figure 40).
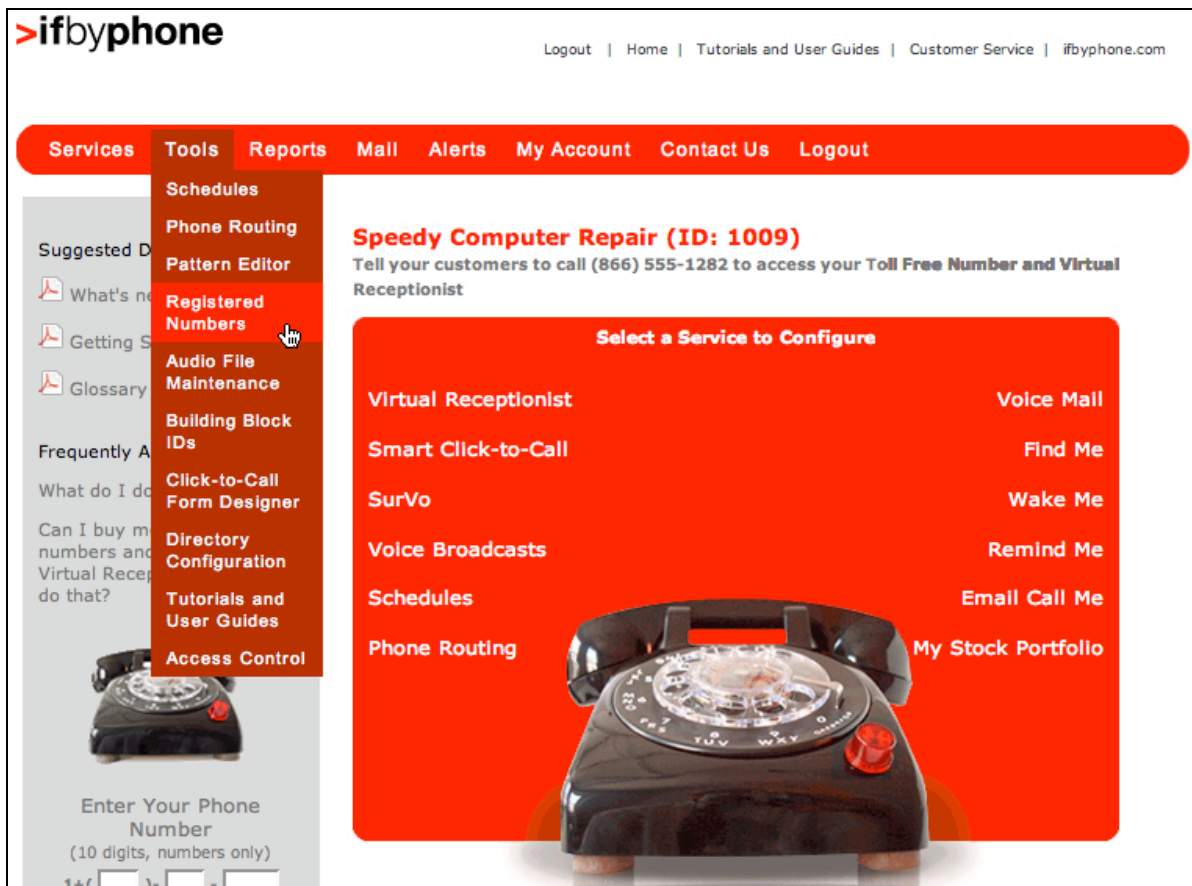

Figure 40: Registered Numbers Utility Link

The following options are available within this utility, on the **Click To – Registered Number Maintenance** page (Figure 41):

- **Phone Number:** Enter the 10 digit phone number (numbers only, with no leading 1) that you wish to approve for connection within a Smart Click-to-Call destination. Please note that this field is mandatory for registering a phone number.
- **Description:** Enter a name or brief description of the phone number. Please note that this field is mandatory for registering a phone number.

- **Add to Registered Number List:** Press this button to add the phone number and associated description to your Registered Number list. The number and description will appear in the box labeled **List of Registered Phone Numbers**.
- **Delete Highlighted Number:** To delete a phone number from the list, highlight the phone number you wish to remove and press the **Delete Highlighted Number** button. The screen will redisplay the Registered Number list without the previously selected number.

> **WARNING: Deleting Registered Numbers**
> You cannot delete phone numbers that are currently being accessed by Smart Click-to-Call from the Registered Number list. You must disable them from use before deletion.

- **Done:** Press this button when you have completed the desired Registered Number Maintenance. The ifbyphone Main Menu page will be displayed.

Figure 41: Registered Numbers Utility

Click-to-Call w/Info Form Designer

Click-to-Call w/ Info allows a user to effectively present a Web site visitor with a pop-up box for the purpose of capturing their telephone number and any additional information. The format of

the dialog form is controlled completely by you, in that you can add any number of fields, headers and text blocks. For example, include instructions on how to complete the form or provide a promotional code.

Before adding a dialog form to the Click-to-Call, however, you must configure it through the "Click-to-Call Form Designer" option, located within "Tools" on the Main page's drop-down toolbar. Follow the procedures below to create a dialog form and implement it in a new Click-to-Call w/ Info configuration.

1. Select **Click-to-Call Form Designer** from the "Tools" menu on the Main page's drop-down toolbar (Figure 42).
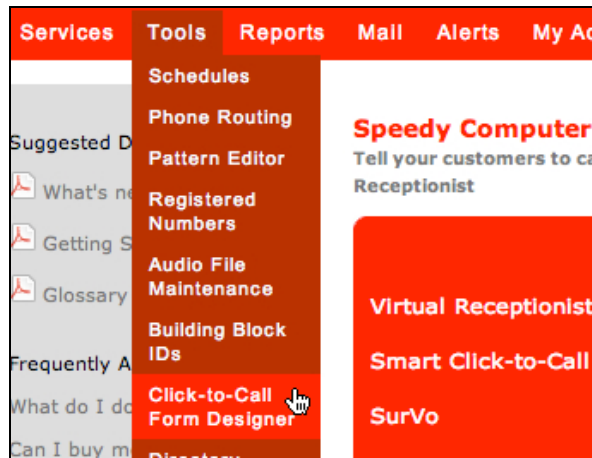
Figure 42: Tools menu

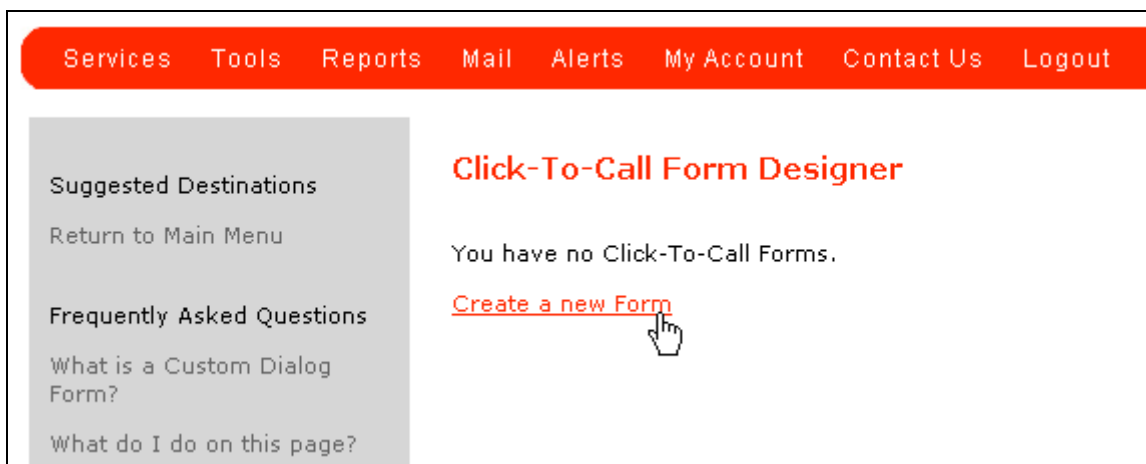2. Click the **Create a new Form** link (Figure).

Figure 43: Create a new Form

3. Give your form a name and enter the text that you want display on the Click-to-Call pop-up within the **Form Intro Text** field (Figure 44). Click **Update** to preview what the text will look like on the Click-to-Call pop-up.
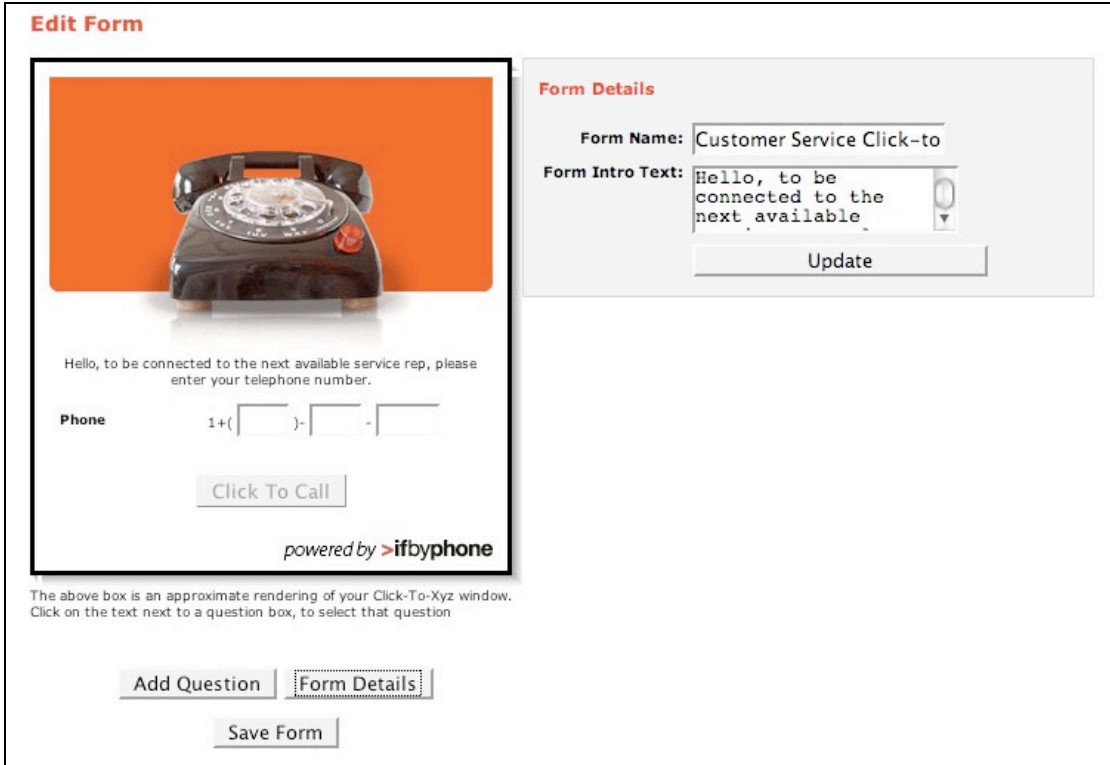
Figure 44: Enter the form's intro text

4. To add questions (Figure 45) that will enable you to either screen your callers or obtain more information about them, click the **Add Question** button (note that you can toggle back-and-forth between the question details and the form details by clicking the respective buttons). You have the following options when entering a new question:

- **Question Name:** Assign a label to the question.
- **Question Type:** Select from Text, SelectBox and CheckBox. If you select Text, the form will dynamically change to allow inputting of the field size (in characters). If you choose either SelectBox or CheckBox, the form will dynamically change to allow inputting of the answer choices (e.g. Yes or No).
- **Active/Visible:** To hide or make the question inactive, check this box. Useful in retaining questions, even when they're not being utilized.
- **Whisper this Question:** Relays the information to the call recipient before the call is transferred. The recipient has the option of not taking the call after hearing the information. Note that information can be collected for reporting purposes even with Whisper turned off.
- **Required:** Mark a question as "Required," so that the caller must answer it before connecting to your business.

To edit any question that you have previously created, simply click the question text on the form.

Figure 45: Enter questions

NOTE: Locating the Data You've Collected
The Whisper this Question function gives you the option to have the answers of your Click-to-Call Form questions "whispered" just before you take the call. Regardless of whether or not you choose this option, the data you collect will be saved in the Smart Click-to-Call configurations list. Click on the **Report** icon (Figure 46) to review the data you collected from the Click-to-Call Form for a particular configuration.

Figure 46: List of Smart Click-to-Call Configurations and Report Icon

5. Click the **Save Form** button to continue.