



SurVo

Stepping Through the Basics



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What is a SurVo?

An ifbyphone building block and destination, SurVos create dialogs over the telephone between callers and a system, much like a Web form with voice recognition capabilities.

SurVo: Voice Survey Form

Similar to a Web form with voice recognition capabilities, a voice form is a dialog between a user and a system configured to provide or collect information. At the completion of a voice form, the information collected can be emailed, saved to a database or transmitted for further processing. SurVos, by definition, are ifbyphone's fully customizable, automated voice forms.

A SurVo can conduct employment screens, provide a customer satisfaction survey or route a call based on a user's answers to a series of questions. SurVos have the potential to be invoked in response to a Click-to-XyZ, an inbound call, an outbound call, a scheduled call or an API request from a Web site.

By following the tutorial outlined in the *SurVo Stepping through the Basics Guide*, in conjunction with accessing the extensive *SurVo Advanced User's Guide*, you can create a SurVo quickly and easily on ifbyphone's Web site. Once you supply an introduction, questions and answers, a wrap-up and data storage options for your SurVo, respondents can connect to it through an ifbyphone Virtual Receptionist menu or Click-to-XyZ configuration.

About the Documentation

The *SurVo Stepping through the Basics Guide* includes the following documentation:

- Description of SurVo features
- SurVo tutorial, with screenshots, for basic setup
- Helpful hints for creating a more complex SurVo

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. The tutorial provides step-by-step instructions for setting up a SurVo 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.



Setting up a SurVo

In this chapter, a tutorial and step-by-step screenshots are available to quickly and easily guide you through setting up a SurVo.

Speech/Recording Options

You may customize your SurVo's introduction, questions and answers, and wrap-up text by employing any one (or combination) of the following methods:

- **Text to Speech (TTS):** TTS is the method by which the text that you enter is translated into speech by a synthesizer. When creating a SurVo, you may enter the dialog to be spoken as plain text and select the gender of the TTS speaker.
- **Upload Recordings:** Record audio WAV files on your computer and upload them for use in a SurVo.
- **Record via ifbyphone:** Mark the SurVo introduction, questions and answers, and/or wrap-up text for recording by ifbyphone, which then initiates a batch recording session. During the batch recording session, ifbyphone will call you at a designated phone number and prompt you to make recordings.



NOTE: Audio Recordings

This guide is limited to covering the TTS method only, as it is the easiest and most basic way to set up a SurVo. For more information on uploading WAV audio files and/or performing a batch recording, please reference the *SurVo Advanced User's Guide*.

Logging in to your ifbyphone Account

To set up and use a SurVo, 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**.

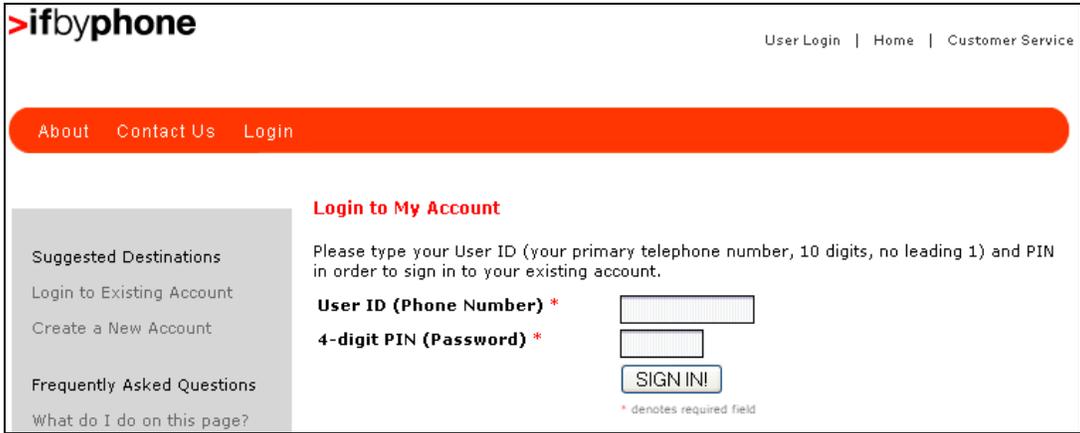


Figure 1: ifbyphone Account Login Screen



Tutorial: Create a SurVo in Wizard Mode

Creating a SurVo in Wizard Mode is recommended for novice users or those without existing SurVos. The SurVo wizard will walk you through the creation process, step by step, after you have successfully logged into your ifbyphone account.

1. Enter the SurVo feature by clicking **SurVo** from either the Main Menu (Figure 2) or on the top navigation bar under **Services**.

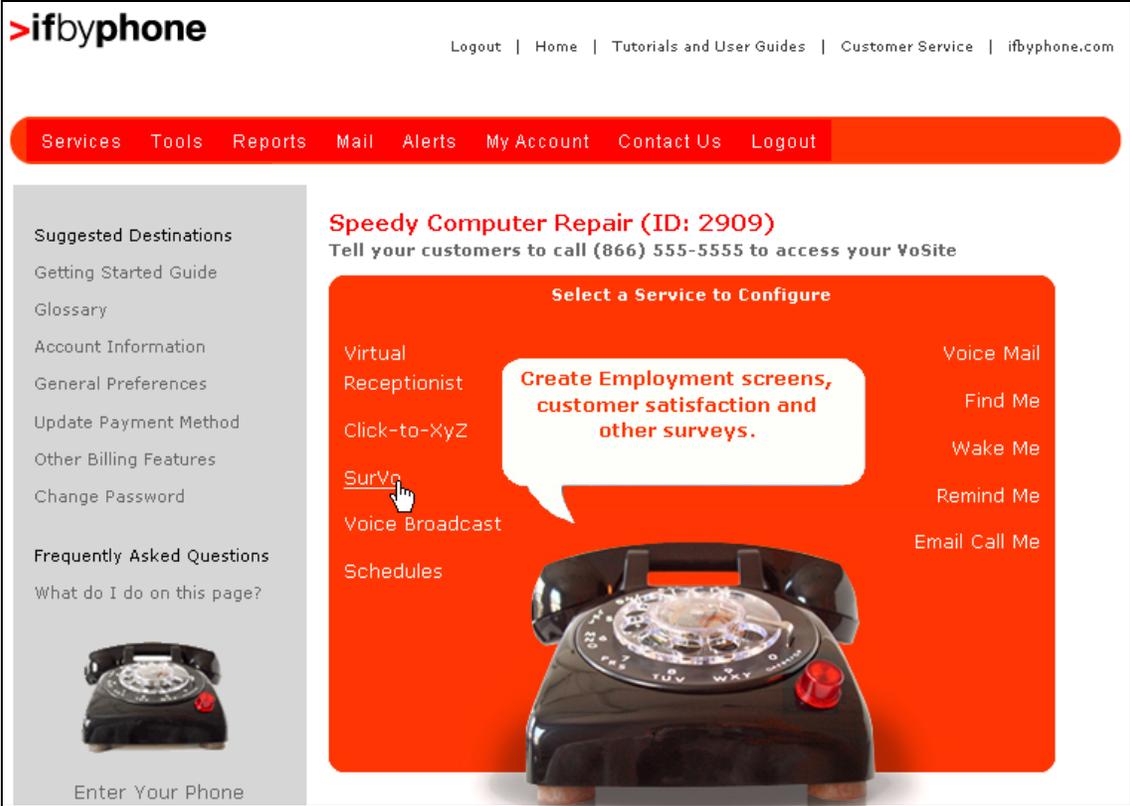


Figure 2: Account Main Menu

2. Click the **Create a new SurVo – Wizard Mode** link (Figure 3).

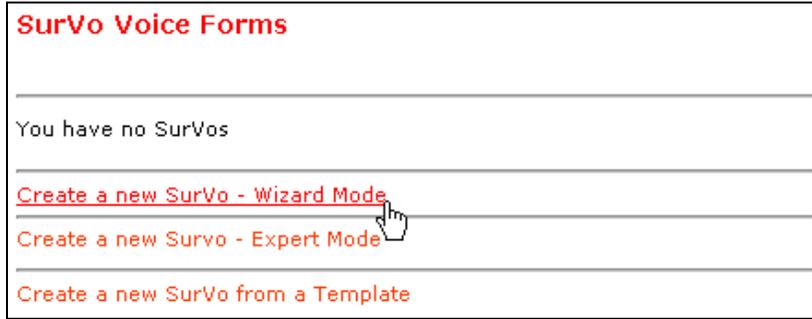


Figure 3: Create a New SurVo – Wizard Mode

3. On the **Edit Survey** page (the first step of the process, indicated by the status bar), enter the following information into the form fields (Figure 4):

- **Survey Name:** Enter a unique name for the SurVo (e.g., “Customer Satisfaction Form”). Please note that this field is mandatory.
- **Survey Text to Speech Parameters:** Contains the TTS parameters of the voice form. TTS is the method by which the text that you enter is translated into speech by the computer.
 - **Voice Gender:** Select between a Male or Female voice.
 - **Announce question numbers:** If checked, the question number will be read before the question text. Note that if this box is checked, the checkbox below will appear asking if you want to “Announce question count.”
 - **Announce question count:** If checked, the number of total SurVo questions will be announced. A sample question count announcement would be “Question 5 of 12.” We recommend using this option for longer voice forms, so that the respondents are always aware of their standing within the SurVo and do not quit before completion.

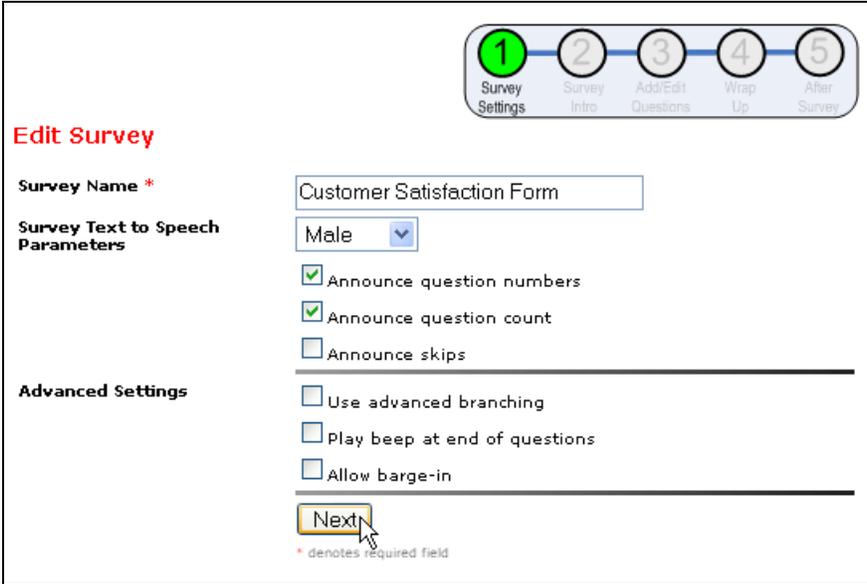


Figure 4: Edit Survey Page



ADVANCED SETUP: Branching, Beeping and Barge-in

Advanced Settings include the following actions: **Advanced Branching** (skip questions based on the cumulative score of answers—it is recommended that the **Announce Skips** box be checked in this case), **Play Beep** (to announce the end of each question), and **Allow Barge-in** (the respondent can interrupt the reading of a question with an answer). See the *SurVo Advanced User’s Guide* for details.

4. Press the **Next** button to save the SurVo, and proceed to the **Edit Survey Prompt** page. Having successfully created the skeleton of a new SurVo, you may now enter the optional introductory text.
 - **Survey Introduction:** Enter the text to be read in the SurVo introduction by the TTS synthesizer (Figure 5). For example, “Please help us serve you and others better by completing our Customer Satisfaction Survey. Answering the questions should only take a few minutes. Thank you!”

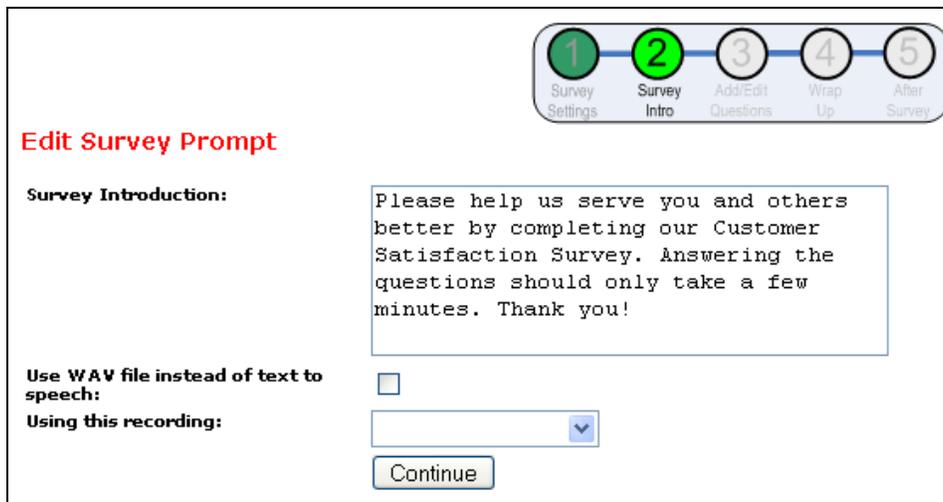


Figure 5: Edit Survey Prompt Page (TTS Dialog)

5. Press the **Continue** button to save your settings and proceed to the next step.



ADVANCED SETUP: Audio File Survey Introduction

Instead of entering text to be processed by the TTS synthesizer, you can upload audio WAV files from your computer, or request that ifbyphone call you in order to record sound files (i.e., batch recording). See the *SurVo Advanced User’s Guide* for more information.

6. The essence of any SurVo is the questions posed to and answers given by respondents. Having created the SurVo and added introductory text, you will now be prompted for SurVo questions and answers. In this tutorial, we will create a SurVo containing four question types: **Yes/No**, **Number**, **Date** and **Open Ended (Recorded)**.

The following is a brief description of settings available on the **Edit Survey Prompt** page (Figure 6). Steps A through D below will guide you through setting up a SurVo with four question types.

Figure 6: Add/Edit Questions (TTS Dialog)

- **Question Text:** Text to be read by the TTS synthesizer. You are required to enter the question text, whether you are using TTS or an audio file for the question. The extra text provides a back-up in case of audio file failure.



ADVANCED SETUP: Recording a SurVo Question

Rather than have the TTS synthesizer read the SurVo question, you may record a SurVo question by checking the **Use WAV File** checkbox and selecting the desired method of obtaining the recording within the **WAV file** drop-down box. See the *SurVo Advanced User's Guide* for more information.

- **Question Type:** We will be creating a SurVo containing four question types:
 - **Date:** The respondent will be expected to supply a date. The answer must be entered in YYYY/MM/DD format if using the keypad.
 - **Number:** The respondent must answer with a number.
 - **Open Ended (Recorded):** The respondent will be prompted to record the answer in a time limit of three minutes. The recorded answer will be available for playback when reviewing the SurVo results.
 - **Yes/No:** The respondent must answer either Yes or No.



ADVANCED SETUP: Other Question Types

Within the **Question Type** drop-down list, you may select from additional question types. These include multiple choice, phone number, currency, digits, time, transfer, prompt only, extended recording and answering machine. For help on setting up these question types, see the *SurVo Advanced User's Guide*.

- **Verify answer:** If checked, ifbyphone will read the answer back to the respondent for verification.

A rectangular box containing the text "Verify answer" on the left and a small, empty square checkbox on the right.

Figure 7: Verify Answer

- **Save/Done** button: Saves the information you entered, and proceed to the next step.
- **Save/Add Another Question** button: Saves the current information and allows you to continue entering questions.



WARNING: Reloading Questions

When you choose a question type, the page will automatically reload with the proper answer fields. After changing the question type from **Yes/No** or **Multiple Choice**, you will be prompted (Figure 8) to click the **SAVE** button to accept the change and lose the answers that you already entered.

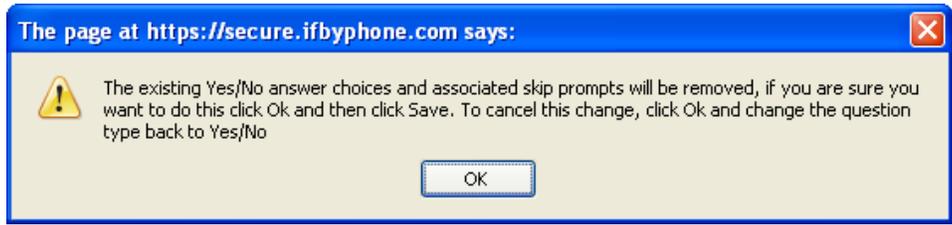


Figure 8: Reloading Prompt

Follow Steps A through D below to setup a SurVo with four questions:

- Enter the following text for the first question (a **Date** question type): "Please tell us the date that you first received our services. If using the keypad, enter the answer as four-digit year, two-digit month and two-digit day. For example, 2007, 04, 01." Once you have entered the text, select **Date** from the **Question type** drop-down list, and place a check in the **Verify answer** box. Press the **Save/Add Another Question** button to save the current information and continue entering questions (Figure 9).

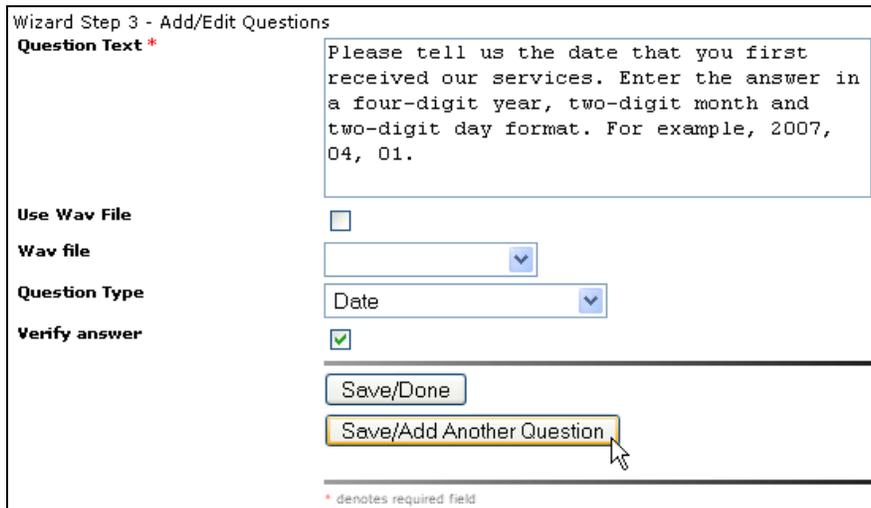
A screenshot of a web form titled "Wizard Step 3 - Add/Edit Questions". It features a text area with the question text: "Please tell us the date that you first received our services. Enter the answer in a four-digit year, two-digit month and two-digit day format. For example, 2007, 04, 01." Below the text area are four fields: "Use Wav File" with an unchecked checkbox, "Wav file" with a dropdown menu, "Question Type" with a dropdown menu set to "Date", and "Verify answer" with a checked checkbox. At the bottom are two buttons: "Save/Done" and "Save/Add Another Question", with a mouse cursor pointing at the second button. A small asterisk and the text "* denotes required field" are at the very bottom.

Figure 9: Enter a Date Question

- B. Enter the following text for the second question (a **Number** question type): “On a scale of one to 10, with 10 being terrific, how would you rate our service?” Once you have entered the text, select **Number** from the **Question type** drop-down list. Press the **Save/Add Another Question** button to save the current information and continue entering questions (Figure 10).

Edit Survey Question

Question Text * On a scale of one to ten, how would you rate our service?

Use Wav File

Wav file [Empty dropdown]

Question Type Number [dropdown]

Verify answer

Save

* denotes required field

Figure 10: Enter a Digits Question

- C. Enter the following text for the third question (an **Open Ended** question type): “Please describe, in your own words, the level of customer service that you have experienced from our company. You have three minutes.” Ensure that **Open Ended (Recorded)** appears in the **Question type** drop-down list. Press the **Save/Add Another Question** button to save the current information and continue entering questions (Figure 11).

Wizard Step 3 - Add/Edit Questions

Question Text * Please describe, in your own words, the level of customer service that you experienced from our company. You have three minutes.

Use Wav File

Wav file [Empty dropdown]

Question Type Open Ended (Recorded) [dropdown]

Verify answer

Save/Done

Save/Add Another Question

* denotes required field

Figure 11: Enter an Open Ended Question

- D. Enter the following text for the fourth question (a **Yes/No** question type): “Based on your experience, would you consider using our services again in the future?” Once you have entered the text, select **Yes/No** from the **Question type** drop-down list. Press the **Save/Done** button to save the information you entered, and proceed to the next step (Figure 12).

Wizard Step 3 - Add/Edit Questions

Question Text * Based on your experience, would you consider using our services again in the future?

Use Wav File

Wav file [dropdown]

Question Type Yes/No [dropdown]

Verify answer

Save/Done **Save/Add Another Question**

Answer 1 Yes
skip to Q#: [input]
Add Skip Message

Answer 2 No
skip to Q#: [input]
Add Skip Message

* denotes required field

Figure 12: Enter a Yes/No Question



ADVANCED SETUP: Skip To Q# and Add Skip Message

For longer SurVos, you may wish to skip to a particular question after a given Yes/No answer. The **skip to Q#** boxes allow you to do so. For any answer with a **skip to Q#** value, you may also add a skip message by pressing **Add Skip Message**. See the *SurVo Advanced User’s Guide* for more information.

- 7. Finish your SurVo with an optional “wrap-up” statement (Figure 13). A sample wrap-up statement for the SurVo created in this tutorial could be, “Thank you for taking our customer satisfaction survey.”



ADVANCED SETUP: Audio File Wrap-Up

Instead of entering text to be processed by the TTS synthesizer, you can upload audio WAV files from your computer, or request that ifbyphone call you in order to record sound files (i.e., batch recording). See the *SurVo Advanced User’s Guide* for more information.

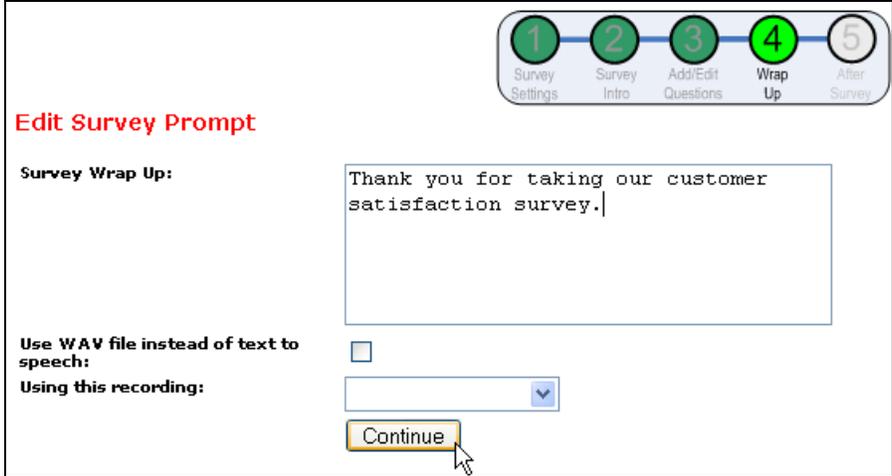


Figure 13: Enter a Yes/No Question

- 8. Once the SurVo has an introduction, questions and answers, and wrap-up text, you must specify a destination for the results. In the final step of the SurVo wizard, select “Email results” from the **Post Survey Action** drop-down list and click the **Add Email Address** link to enter the email address where you would like to receive the results (Figure 14). Check the **Discard Incomplete Surveys** box to exclude incomplete voice forms from the results. Click **Done** when finished (Figure 15).



Figure 14: Add Email Address

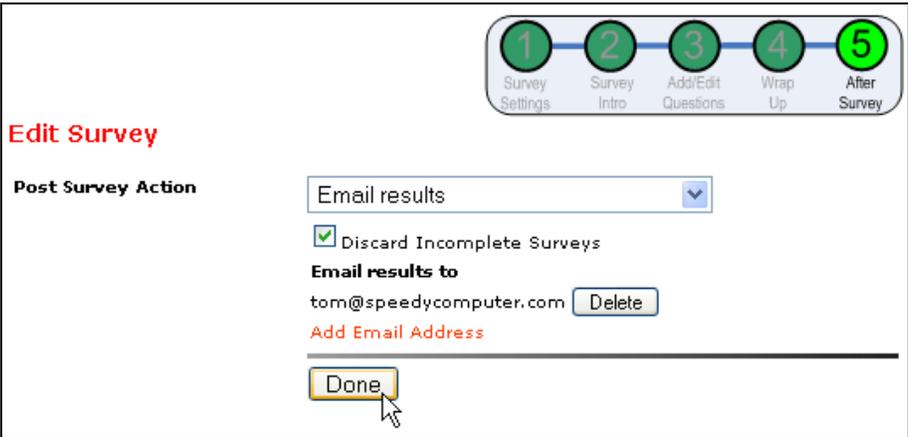


Figure 15: Enter a Post Survey Action



ADVANCED SETUP: Post Survey Action

Additional post survey actions are available within the drop-down list, including combinations of emailing, saving results in a database, and net integration. For complete instructions, see the *SurVo Advanced User's Guide*.

- Continuing on to the **Edit Survey** page, you will be given an overview of your SurVo, where you can edit any previously configured settings (Figure 16). To change the question order, use the blue “up and down” arrow buttons. Press the **Save** button to save your survey.

Edit SurVo

SurVo Name *

SurVo Text to Speech Parameters

Male

Announce question numbers

Announce question count

Announce skips

Advanced Settings

Use advanced branching

Play beep at end of questions

Allow barge-in

SurVo Introduction

Please help us serve you and others better by completing our Customer Satisfaction Survey. Answering the questions should only take a few minutes. Thank you!

SurVo Wrap Up

Thank you for taking our customer satisfaction survey.

Post SurVo Action

Email results

Discard Incomplete SurVos

Email results to

tom@speedycomputer.com

[Add Email Address](#)

* denotes required field

#	Question	Question Type	Answer Choices	Verify	Edit	Delete
1	Please tell us the date that you first received our services. If using the keypad, enter the answer as four-digit year, two-digit month and two-digit day. For example, 2007, 04, 01.	Date		Y	<input type="button" value="edit"/>	<input type="button" value="delete"/>
2	On a scale of one to 10, with 10 being terrific, how would you rate our service?	Number		N	<input type="button" value="edit"/>	<input type="button" value="delete"/>
3	Please describe, in your own words, the level of customer service that you have experienced from our company. You have three minutes.	Open Ended (Recorded)		N	<input type="button" value="edit"/>	<input type="button" value="delete"/>
4	Based on your experience, would you consider using our services again in the future?	Open Ended (Recorded)		N	<input type="button" value="edit"/>	<input type="button" value="delete"/>

[Add new question](#)
[Batch Record Prompts](#)
[SurVo Home](#)

Figure 16: SurVo Overview

10. To view your saved SurVo, click the **SurVo Home** link in the upper left-hand corner (Figure 17).

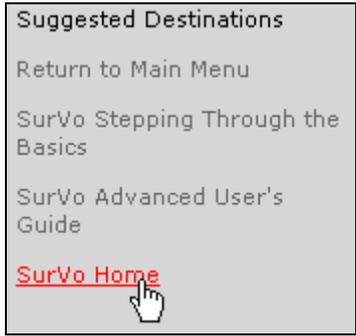


Figure 17: Go to My SurVo's

Your SurVo, and any others that you create, will be listed on the **SurVo Voice Forms** page (Figure 18), along with corresponding **Edit**, **Delete** and **Clone** buttons. For more information about editing, deleting and cloning a SurVo, please refer to the *Survo Advanced User's Guide*.

SurVo Voice Forms				
SurVo Name	Results	Edit	Delete	Clone
Customer Satisfaction Form				
Create a new SurVo - Wizard Mode				
Create a new SurVo - Expert Mode				
Create a new SurVo from a Template				

Figure 18: List of SurVos

11. You may now use your SurVo as a destination for other ifbyphone business services. For example, through ifbyphone's Click-to-XyZ service, customers can click a link, type in their phone number, and connect immediately to your company's SurVo. Your SurVo can also be used as a destination for Virtual Receptionist, ifbyphone's voice-enabled, automatic menu service. Please see the *Click-to-XyZ Advanced User's Guide*, as well as the *Virtual Receptionist Advanced User's Guide*, for additional information.



Ifbyphone Glossary

The purpose of the glossary is to assist you by defining commonly-used ifbyphone 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. Click-to-XyZ 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 Click-to-XyZ, enabling Web site visitors to click a button and immediately speak with a customer service representative or other call recipient.

Click-to-XyZ

An ifbyphone building block that is highly flexible in customization and scalability, Click-to-XyZ enables routed communication between customers, business services and contacts via the Web or Email. Through Click-to-XyZ, 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 Click-to-XyZ 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. Click-to-XyZ can be configured based on the day and/or time of day.

Destinations

Destinations are ifbyphone services/building blocks that can be configured for Click-to-XyZ access. Through Click-to-XyZ, 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 Click-to-XyZ.

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, Click-to-XyZ 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 Click-to-XyZ and Virtual Receptionist. Within a schedule, it is possible to specify a desired time zone, as well as modes.

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 Click-to-XYZ, 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 through 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.