



SurVo

Advanced User's Guide



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What is a SurVo?

An Ifbyphone building block and destination, SurVos are used to 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 be utilized to 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 Smart Click-to-Call, an inbound call, an outbound call (voice broadcast), a scheduled call, or an API request from a Web site. For information on scheduling a SurVo as an outbound Voice Broadcast, see the *Voice Broadcast Guide*.

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 Smart Click-to-Call configuration.

About the Documentation

The *SurVo Advanced User’s Guide* includes the following documentation:

- Description of SurVo features
- SurVo basics, including everything that is needed for setup 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 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.

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Setting up a SurVo

In this chapter, tutorials 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.

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**.

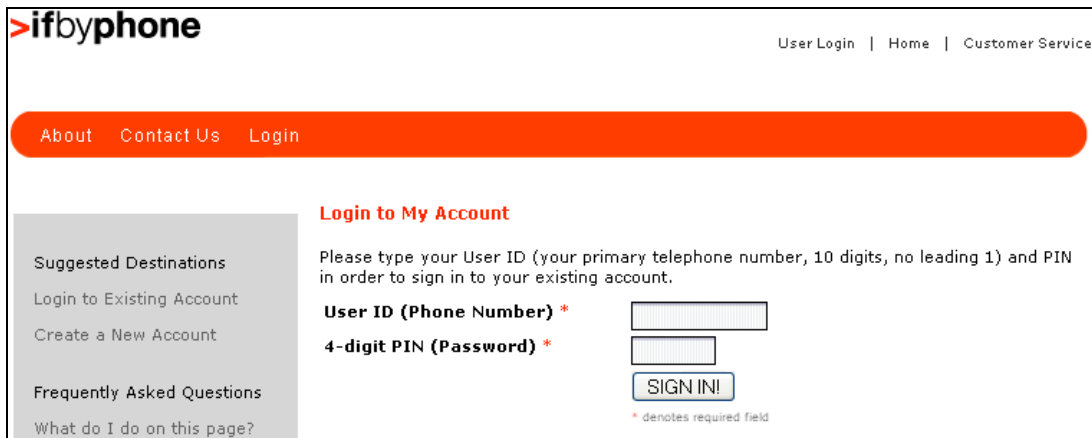


Figure 1: Ifbyphone Account Login Screen

SurVo Creation Options

To set up a SurVo, you have three creation mode options:

- **Create a new survey – Wizard Mode:** This creation option is recommended for novice users or those without existing SurVos. The SurVo creation wizard will walk you through the process, step by step, as detailed in the proceeding tutorials.
- **Create a new survey – Expert Mode:** This creation option assumes that a user is experienced in creating new SurVos. You may edit existing SurVo steps or add new steps by following the given links and instructions. Expert mode gives you quick access to any part of the SurVo that you wish to edit. Note that expert mode is the mode employed when editing an existing SurVo.
- **Create a new survey from a Template:** This creation option presents a list of templates in table and graphic preview modes, enabling you to use a template to create a new SurVo. Templates are SurVo skeletons supplied by ifbyphone (Figure 2).

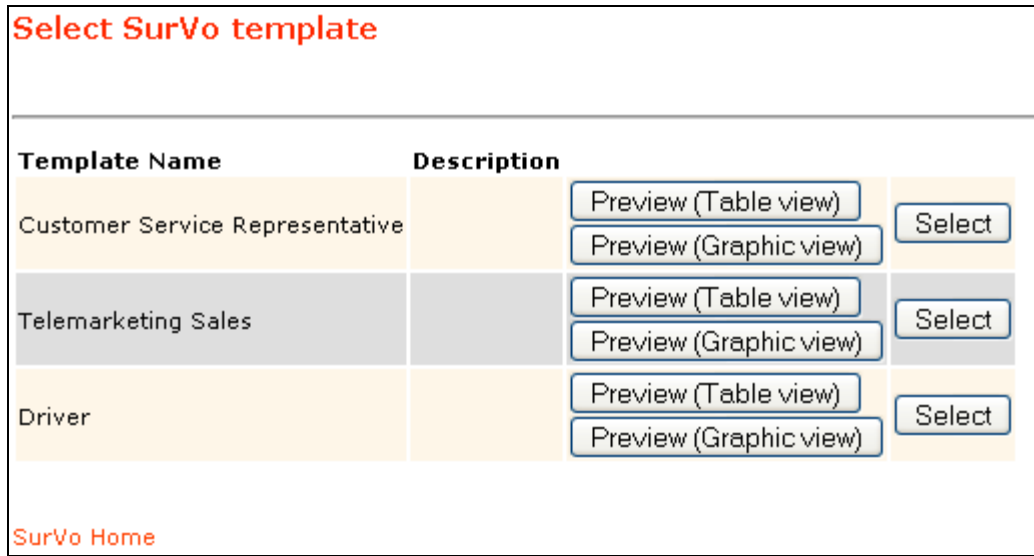


Figure 2: SurVo Templates

On the **Select SurVo template** page, press the corresponding **Select** button to copy a template into a new SurVo. Enter the new SurVo name when prompted. Upon returning to the main SurVo page, a copy of the selected SurVo template will be listed under the designated name.



Tutorial 1: Create a SurVo Structure 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 in to your Ifbyphone account.

- 1. Enter the SurVo feature by clicking **SurVo** from either the Main Menu (Figure 3) or on the top navigation bar under **Services**.

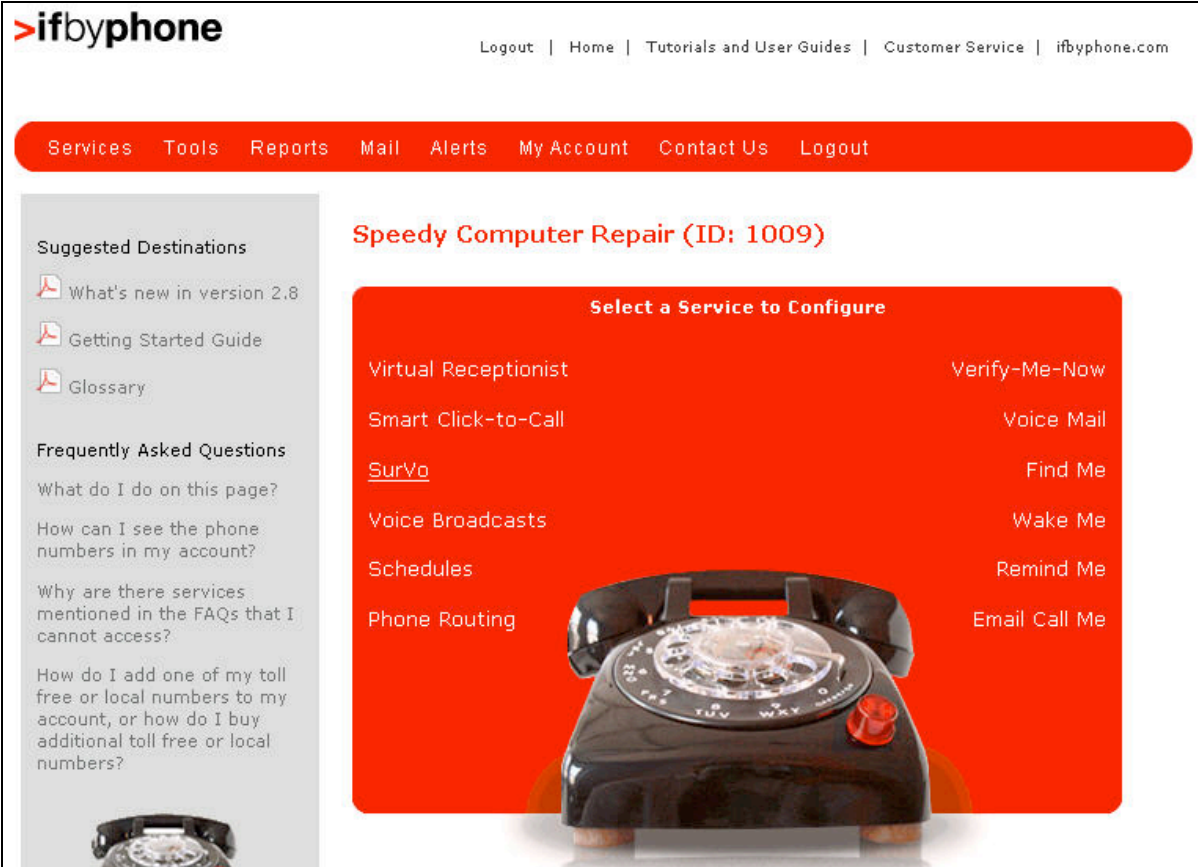


Figure 3: Account Main Menu

- 2. Click the **Create a new SurVo – Wizard Mode** link (Figure 4).

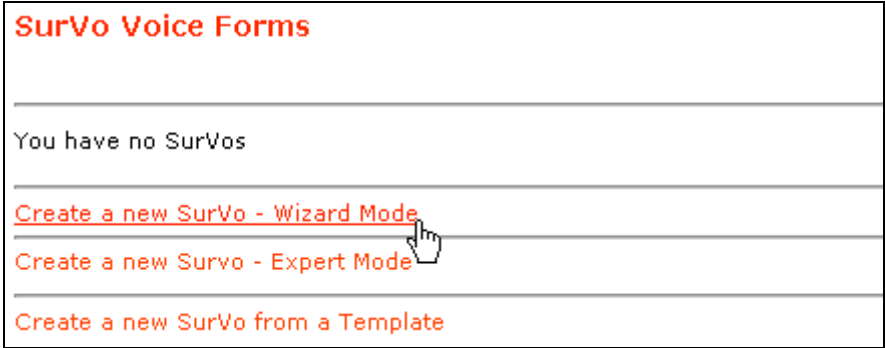


Figure 4: Create a New SurVo – Wizard Mode

- 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 5):

Edit Survey

Survey Name *

Survey 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

* denotes required field

Figure 5: Edit Survey Page

- **Survey Name:** Enter a unique name for the SurVo. Sample names include “Bank Teller Job Pre-screening,” “New Patient Health Survey” and “Customer Satisfaction Form.” Please note that this field is mandatory.
- **Survey Text to Speech Parameters:** Contains the Text to Speech (TTS) parameters of the voice form. Text to Speech 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. If you are recording audio portions of the SurVo yourself, you may wish to choose your gender for the computer-generated voice.
 - **Announce question numbers:** If checked, the question number will be read before the question text. If you opt to announce question numbers and use branching to skip questions, we recommend that you announce skips as well, so that respondents do not get confused. Note that if this box is checked, the checkbox for the next question. “Announce question count” will appear.
 - **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.
 - **Announce skips:** If the ability to skip upcoming questions based on previous answers is built into the SurVo, this box can be checked to announce that questions are being skipped.

- **Advanced Settings**
 - **Use advanced branching:** If checked, advanced branching will be enabled. Unlike simple branching (skipping questions based on a single answer), advanced branching permits questions to be skipped based on the cumulative score of multiple answers. You may assign a score to each answer and determine the minimum score (“threshold”) needed to either ask a question or skip to the given location. We recommend you practice creating voice forms before adding advanced branching. Please see *Tutorial 3: Add Questions and Answers* for additional information.
 - **Play beep at end of questions:** If checked, a beep sound will signal the end of each question.
 - **Allow barge-in:** If checked, the voice form respondent can interrupt the reading of the question with an answer.
4. Press the **Next** button to save the new SurVo, and proceed to creating your SurVo’s introductory prompt.



Tutorial 2: Create a SurVo Intro

Having successfully created the structure of a new SurVo, you may now enter the optional introductory TTS text, upload audio files from your computer or request that ifbyphone call you in order to record sound files on the **Edit Survey Prompt** page.

1. **Survey Introduction:** To create a SurVo introduction using the TTS synthesizer, enter the text to be read in the dialog box (Figure 6). 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 6: SurVo Introduction

Alternatively, you may record the SurVo introduction by one of the following methods:

- **Use WAV file instead of text to speech:** If checked, a recorded sound file will be used in place of the TTS dialog.
- **Using this recording:** Enter the method of obtaining the sound file.
 - **Batch Record:** When the SurVo setup has been completed, ifbyphone will call you at a designated phone number to record all of the requested sound files in

one session. See the Appendix section entitled *Batch Recording Sound Files* for more details.

- **Upload WAV File:** Designate a sound file on your computer to be uploaded to ifbyphone and used as the dialog for your introduction. See the Appendix section entitled **Error! Reference source not found.** for more details.
2. Press the **Continue** button to save your settings and proceed to adding SurVo questions and answers.



Tutorial 3: Add Questions and Answers

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. The following is a brief description of available settings:

1. As in the introductory text, questions and answers may be inputted as text, a WAV file, or recorded as a group (batch recording) over the phone (Figure 7).
 - **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.
 - **Use WAV File:** Check this box if you are using an audio file for the question.
 - **WAV file:** If you checked **Use Wav File**, select a method of obtaining the recording:
 - **Batch Record:** Ifbyphone will phone you at the end of the SurVo creation process to prompt you to record the SurVo text, questions, and answers you designated for recording. See the Appendix section entitled *Batch Recording Sound Files* for more details.
 - **Upload WAV file:** You will be prompted to select a pre-recorded WAV file for uploading to Ifbyphone. See the Appendix section entitled **Error! Reference source not found.** for more details.

Figure 7: Enter Question Text

2. The following settings become available for questions and answers when advanced branching is enabled within the SurVo structure (please see *Tutorial 1: Create a SurVo Structure in Wizard Mode* for additional information).

- **Threshold Score:** The threshold score is a value set for a question to determine the branching action. The current score is tallied and compared to the threshold score. If the current score does not meet or exceed the threshold score, a skip action will occur.
- **Below Threshold Skip Action:** If the score is below the threshold score, the caller will be skipped from the current question to the question listed. For example, if a caller answered “No” to whether or not they received good customer service and gave the company a satisfaction rating of 3 out of 10 (with 10 being great), they can be skipped to an open-ended question asking them to describe their bad experience.
- **After Answering Skip Action:** If the score meets or exceeds the threshold score, the current question will be asked. If a target question is designated, the respondent will be skipped to it.

Adv. Branching:	
Threshold Score:	<input type="text" value="8"/>
Below threshold? skip question and go to Q#:	<input type="text" value="3"/>
After answering, skip to question:	<input type="text" value="4"/>

Figure 8: Advanced Branching

- **Advanced Branching Value:** The advanced branching value lets you assign a “weight” to each answer; the cumulative sum of which will decide if you should continue down that question path or move to another.

Advanced Branching Value: <input type="text" value="4"/>
--

Figure 9: Advanced Branching Value

3. **Question Type:** Select the type of question from the following options (Figure 10):

Number
Yes/No
Multiple Choice
Number
Phone Number
Open Ended (Recorded)
Currency
Date
Digits
Prompt Only
Time
Transfer
Extended Recording
Answering Machine
SurVo Directory
Monitored Call
Answering Machine - Auto
Prompt with 'any key' escape
Goto VR/FindMe/VMail

Figure 10: Select Question Type

- **Yes/No:** The respondent must answer either Yes or No.

Figure 11: Yes/No Answers

- If you wish to skip to a particular question after a given answer, enter the number of the target question in the **skip to Q#** box. To skip a respondent to the end of the SurVo, type “End.” As you add questions to the SurVo, callers will continue to be pointed to the end of the SurVo.
 - For any answer with a **skip to Q#** value, you may add a Skip Message by pressing the **Add Skip Message** button and entering the text to be spoken when skipping occurs.
- **Multiple Choice:** Create as many answers to the question as desired (Figure 12), from which the respondent must choose one answer. You will be prompted to input the number of multiple choice answers desired for the question. Answer fields corresponding to each multiple choice answer will appear on the page. Fill in the number when the box appears (note that the expected answer is numeric).

Figure 12: Number of Multiple Choice Answers

- Enter answer text for each answer (Figure 13). Only letters, numbers, and spaces are permitted. Since the answer text will be used for comparison purposes only, punctuation is irrelevant.
- If you wish to skip to a particular question after a given answer, enter the number of the target question in the **skip to Q#** box. To skip a respondent to the end of the SurVo, type “End.” As you add questions to the SurVo, callers will continue to be pointed to the end of the SurVo.
- For any answer with a **skip to Q#** value, you may add a skip message by pressing the **Add Skip Message** button and entering the text to be spoken by the Text to Speech synthesizer when skipping occurs.
- While entering Multiple Choice answers, you may add another multiple choice answer by clicking the **Add answer choice** link.

Figure 13: Multiple Choice Answers

- **Phone Number:** The expected answer will be in the form of a phone number.
- **Open Ended (Recorded):** The respondent will be prompted to record the answer (time limit of three minutes). The recorded answer will be available for playback when reviewing the SurVo results. To indicate the end of a recording, the user may press the # key.
- **Currency:** The expected answer will be in the form of currency.
- **Date:** The respondent will be expected to supply a date. If using the telephone keypad to enter the answer, use YYYY/MM/DD format. Note that you should include these instructions in your question.
- **Digits:** The answer is expected to be given in digits (e.g. a social security number)
- **Time:** The respondent will be expected to supply a valid time. If entered via the telephone keypad, the number should correspond to a valid hour of the day in military format (0 – 23). Note that you should include these instructions in your question.
- **Transfer:** Route the call to a designated ten-digit phone number.
- **Prompt Only:** The question is read without accepting an answer. You may then skip to a specified question after the prompt is read. For example, after the prompt, “The next three questions are in regards to your demographic,” is read, the caller will skip to a question asking their age.
- **Extended Recording:** Similar to the Open Ended (Recorded) question type, except that you may specify how long you want the maximum call duration to be. You must type in a number and then either M for minutes or S for seconds. To indicate the end of a recording, the user may press the # key.
- **SurVo Directory:** Similar to a Multiple Choice question, but allows for a long list of answer choices to be entered. Each answer choice will not be read to the caller, but each of the choices will be acceptable answers. For more information, see the *Directory Configuration User’s Guide*.
- **Answering Machine:** Presents the respondent with an initial prompt to determine if the system has reached a live person or a machine. The respondent can hit any key to continue; if they do, the system enables “live person” routing and skips to a designated question. Otherwise, the system assumes that it has reached a machine, and will pause to “listen” for the greeting and a beep. After hearing several seconds of silence, the system then routes to a question type which will deliver a message to the machine (a **Prompt Only** question type is recommended in this case). It is not recommended to have a wrap-up when using the **Answering Machine** question type (see *Tutorial 4: Create a SurVo Wrap-Up* for more information).

- **Answering Machine-Auto:** The same as the above choice but uses a complex algorithm to automatically determine if the call has been answered by a live person or an answering machine.
- **Prompt with ‘any key’ escape:** Used for Interactive Voice Broadcasts to allow for immediate transfer to a live agent. If you have created an Interactive Voice Broadcast, this prompt only question type will route to whatever question number you tell it to when someone has pressed any key. Route it to a Transfer question type to allow for transfer to a live agent during broadcasts.
- **Goto VR/FindMe/Vmail:** Allows for transfer to an Ifbyphone Virtual Receptionist, Find Me list, or Voice Mail.



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 14) to click the **SAVE** button to accept the change and lose the answers that you already entered.

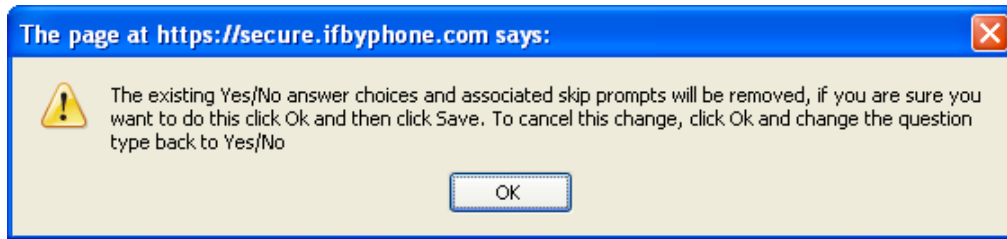


Figure 14: Reloading Prompt

4. **Verify answer:** Check this box if you wish Ifbyphone to read the answer back to the respondent for verification.

Verify answer

Figure 15: Verify Answer

5. Press the **Save/Done** button to save the information you entered and proceed to the next step, or press the **Save/Add Another Question** button to save the current information and continue entering questions.



Tutorial 4: Create a SurVo Wrap-Up

Finish your SurVo content with an optional “wrap-up” statement. Identical to creating an introduction, you may enter the optional wrap-up TTS text, upload audio files from your computer or request that Ifbyphone call you in order to record sound files.

1. **Survey Wrap Up:** To create a SurVo wrap-up using the TTS synthesizer, enter the text to be read in the dialog box (Figure 16). For example, “Thank you for taking our customer satisfaction survey.”

Edit Survey Prompt

Survey Wrap Up: Thank you for taking our customer satisfaction survey.

Use WAV file instead of text to speech:

Using this recording: [Dropdown]

Continue

Figure 16: SurVo Wrap-Up

Alternatively, you may record the SurVo wrap-up by one of the following methods:

- **Use WAV file instead of text to speech:** If checked, a recorded sound file will be used in place of the TTS dialog.
- **Using this recording:** Enter the method of obtaining the sound file.
 - **Batch Record:** When the SurVo setup has been completed, Ifbyphone will call you at a designated phone number to record all of the requested sound files in one session. See the Appendix section entitled *Batch Recording Sound Files* for more details.
 - **Upload WAV File:** Designate a sound file on your computer to be uploaded to Ifbyphone and used as the dialog for your wrap-up. See the Appendix section entitled **Error! Reference source not found.** for more details.

2. Press the **Continue** button to save your settings and proceed to the post survey action page.



Tutorial 5: Post SurVo Action

Once the SurVo has an introduction, questions and answers, and wrap-up text, you must specify a destination for the results. The following settings appear on the **Post Survey Action** page (Figure 17):

Edit Survey

Post Survey Action

Email results [Dropdown]

Discard Incomplete Surveys

Email results to
[Add Email Address](#)

Done

Figure 17: Post Survey Action page

1. In the final step of the SurVo wizard, you may select from one of several options listed in the **Post Survey Action** drop-down list.

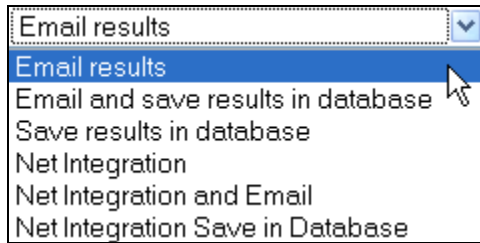


Figure 18: Post Survey Action list

- **Email Results:** Send the SurVo results to every Email recipient listed. An email will be sent as each SurVo is completed.
- **Email and save results in database:** Send the SurVo results to every Email recipient listed and store results in the Ifbyphone database.
- **Save results in database:** Store results in the Ifbyphone database.
- **Net Integration:** Post voice form results to a designated Web site. After posting the results to the website, a response can be returned and read to the respondent, or the voice form can disconnect. Acceptable response formats are HTML/Text, XML, RSS or Atom.
- **Net Integration and Email:** Post voice form results to a designated Web site (see the preceding "Net Integration" bullet) and send results to every Email recipient listed.
- **Net Integration Save in Database:** Post voice form results to a designated Web site (see the preceding "Net Integration" bullet) and store results in the Ifbyphone database.

See the *API (Phone Mashup) Developer Guide* for more information on Net Integration.

2. Click the **Add Email Address** link to enter Email addresses (you must enter at least *one* if you selected **Email Results** in the drop-down list) where you would like to receive the results (Figure 19). You may press the **Delete** button, which appears as you enter Email addresses, to delete a previously-entered address.



Figure 19: Add Email Address

3. Lastly, check the **Discard Incomplete Surveys** box to exclude incomplete voice forms from the results and click **Done** when finished (Figure 20).

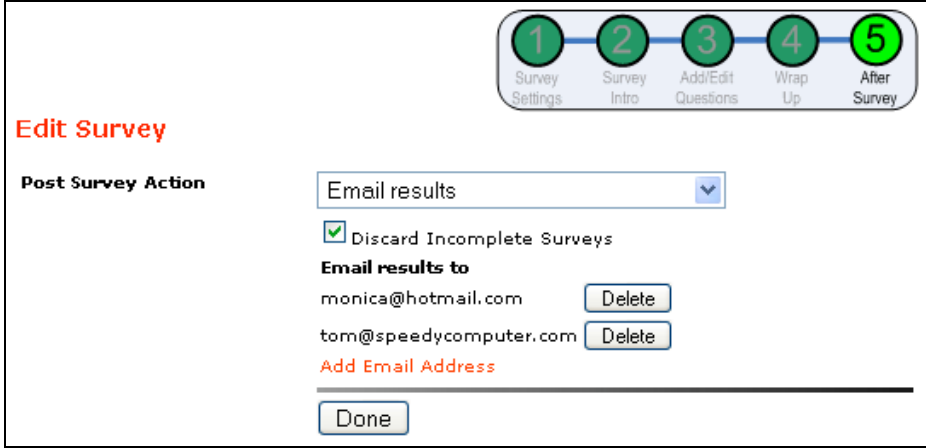


Figure 20: Submit Post Survey Action



NOTE: NetGet Link

Upon selecting one of the Net Integration options from the **Post Survey Action** drop-down list, the NetGet link will appear (Figure 21). On the SurVo NetGet page, you can configure your SurVo to post the voice form results to a Web site (Figure 22).



Figure 21: Add/Edit Net Get Link

The following settings are available on the **SurVo NetGet** page (Figure 22):

- **NetGet Action** (select from the drop-down list)
 - Retrieve HTML/TEXT and read to user
 - Retrieve RSS and read to user
 - Transmit data and disconnect
 - Transmit data and get next action
- **Submit Type** (choose from either GET or POST submit formats)
- **Domain** (enter the complete URL or Web address of the site)
- **Page** (enter the complete filename, including directory designation)
- **Static Parameters** (enter parameters to be passed to the NetGet page)
- **SurVo Generated Parameters** (connect a user-defined local value with items in the drop-down list)
 - Caller ID
 - Unique ID
 - Timestamp
 - Passthrough Data

Configure the URL that will be used to submit SurVo results to your website/server and what action it should take with the results.

NetGet Action: Retrieve HTML/TEXT and read to user

Submit Type: GET

Domain: http://

Page:

Static Parameters:

SurVo Generated Parameters:

Parameter 1: =

To remove a parameter just delete its contents or select the blank option from the drop down and hit update.
To add another parameter after current ones are filled in, hit Save/Update and a new empty parameter field will be added to the list.

Figure 22: NetGet page

After designating the local value, press the **Save/Update** button. A new parameter field will appear for additional parameters. Press the **Save and Return to SurVo** button to save the entered information and return to the designated SurVo. See the *API (Phone Mashup) Developer Guide* for more information on Net Integration.



Tutorial 6: Reviewing a SurVo

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 23). 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		
2	On a scale of one to 10, with 10 being terrific, how would you rate our service?	Number		N		
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		
4	Based on your experience, would you consider using our services again in the future?	Open Ended (Recorded)		N		

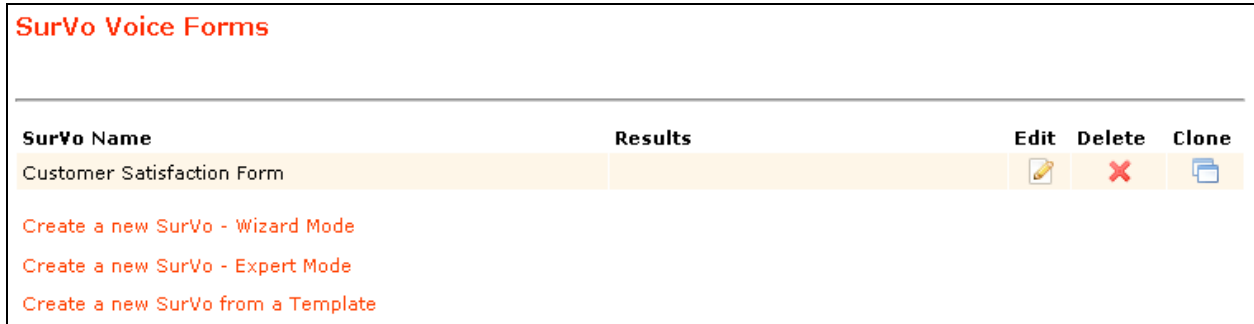
[Add new question](#)
[Batch Record Prompts](#)
[SurVo Home](#)

Figure 23: SurVo Edit/Review

To view your saved SurVo, click the [SurVo Home](#) link in the upper left-hand corner of the page. Your SurVo, and any others that you create, will be listed on the **SurVo Voice Forms** page (Figure 24), along with corresponding **Edit**, **Delete** and **Clone** buttons. An **Edit** button alongside a SurVo indicates that there are no results in the database and the SurVo may therefore be edited. Once there is data stored in the database for a SurVo, it can no longer be edited, since inconsistent data would be produced as a result.

Thus, press the **Edit** button to display the **Edit Survey** page for a SurVo that has no data. To duplicate a SurVo, press the **Clone** button alongside the desired SurVo. Enter the name of the new cloned SurVo when prompted. If you need to change a SurVo after it is in use, you may clone the SurVo, edit and save the clone, then use the new cloned version as your SurVo. Note

that you may edit a SurVo if you delete all data associated with it. Please see *Tutorial 7: Obtaining SurVo Results* for additional information.



SurVo Name	Results	Edit	Delete	Clone
Customer Satisfaction Form	SurVo Results			

[Create a new SurVo - Wizard Mode](#)
[Create a new SurVo - Expert Mode](#)
[Create a new SurVo from a Template](#)

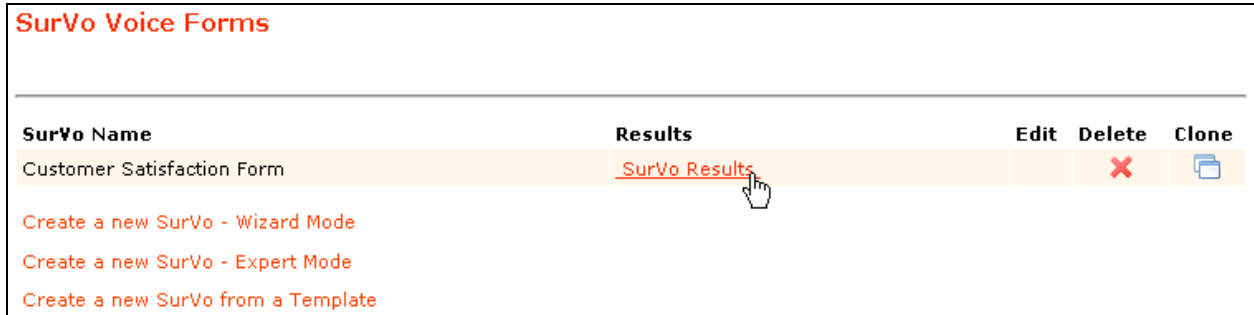
Figure 24: List of SurVos

You may now use your SurVo as a destination for other Ifbyphone business services. For example, through Ifbyphone’s Smart Click-to-Call 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 environment service. Please see the *Smart Click-to-Call Advanced User’s Guide*, as well as the *Virtual Receptionist Advanced User’s Guide*, for additional information.



Tutorial 7: Obtaining SurVo Results

If you have chosen to save SurVo results in a database, you may view the results via the **Survey Results** link on the **SurVo Voice Forms** page. Click the **Survey Results** link to display the **Results** page. Survey results may also be viewed using the **SurVo Report** tool. See the user guide, *Reports Version 2.8 Addendum* for more information.



SurVo Name	Results	Edit	Delete	Clone
Customer Satisfaction Form	SurVo Results			

[Create a new SurVo - Wizard Mode](#)
[Create a new SurVo - Expert Mode](#)
[Create a new SurVo from a Template](#)

Figure 25: Survey Results Link

On the **Survey Results** page, the following fields are listed (Figure 26):

- Name of the SurVo being viewed
- **Results filter:** Text boxes are listed across the page over each result field for entering filter parameters. Enter desired parameters to filter the answers.
 - Press the **Apply >>** button to apply the filter. The Survey Results page will redisplay listing the filtered results.
 - Press the **Clear >>** button to remove the filter and redisplay all the SurVo results.
- **Table of results:** Each line contains a garbage can icon, ID number, caller ID, the SurVo session's timestamp and answers from that call.
 - Recorded answers will be indicated by a WAV icon. Click the WAV icon to play the recorded answer.
 - Press the garbage can icon to delete the associated answer.
- **Question Legend:** Each line contains the question number, question text and type of question.
- **Return to SurVo Home** link: Click to return to your list of SurVos on the **SurVo Voice Forms** page
- **Get ZIP Archive** button: Initiates a download of the results in ZIP format
- **Delete ALL Survey Data** button: After confirming that you want to delete the SurVo results, the stored SurVo results are deleted. Note that if you delete all data, the SurVo will become available for editing.
- **Delete SurVo Data Before:** Allows you to delete all data before a certain day so that you don't delete all of your survey results.

Results: Customer Satisfaction Form

Filter Results:

Apply >> >= [] <= [] >= [] <= [] >= [] <= [] []

Clear >>

ID	Caller ID	Timestamp	Q1	Q2	Q3	Q4
253062	8476766614	2008-05-19 16:49:29	20071114	8	Wav	Yes

Click a column heading to sort by that column (all current filter options will be applied).
The current sort column is green. Clicking it again will reverse the sort.
Mouse over the question number to see the question text.
Timestamp filter criteria is by date (not time) and should be in the format YYYYMMDD.

Question Legend:

#	Question	Question Type
1	Please tell us the date you first received our services.	Date
2	On a scale of 1 to 10, with 10 being terrific, how would you rate our service?	Number
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)
4	Based on your experience, would you consider using our services again in the near future?	Yes/No

[Return to SurVo Home](#)

Below you may download a complete archive of this SurVo:

Get ZIP Archive

Delete ALL SurVo Data

Delete SurVo Data Before: [] (mm/dd/yyyy)

Figure 26: Survey Results Page

3

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. 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 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.

4

Appendix

The Appendix defines processes and steps that are useful, although not essential, to setting up SurVo.

Batch Recording Sound Files

You can request ifbyphone to call you in order to record sound files for use in SurVos. From the **Edit Survey** page, click the **Batch Record Prompts** link to initiate a recording session. The Batch Recording page will appear.

The text segments that you have designated for batch recording will be displayed in the table, which lists the Item (question/introduction/wrap-up), Prompt to Record, and Wav File Name for each segment. The Prompt to Record listings indicate the text you that you previously entered for the recorded segment. Enter the following information to initiate the recording session:

- **Phone Number:** Input the phone number that ifbyphone should use to call you.
- **Call Me to Record These Prompts:** Press this button when you are ready to initiate the call.

Batch Recording

The system will now call you so you can record the items below. The system will guide you through the recording process, just follow the instructions.

Item	Prompt to Record	Wav File Name
The Survey Welcome		survey_welcome.wav
The Survey Wrap Up	Thank you for taking our customer satisfaction survey.	thankyou.wav

Phone Number: *

* denotes required field

Figure 27: Batch Recording Page

After you complete the requested information, press the **Call Me to Record This Prompt** button to have ifbyphone call you at the specified number. Answer the call and follow the instructions, reading the Prompt to Record listing for each recorded segment. For information regarding the maintenance of audio files, please refer to the *Audio File Maintenance Advanced User's Guide*.

Recording Sound Files via PC

You may record a WAV audio file using a microphone and the **Sound Recorder** utility that is included with Windows operating systems. Follow the instructions below:

1. To start Sound Recorder, left-click the Start button on the Windows menu toolbar, and then click Open.
2. Double-click the Programs folder, then the Accessories folder, and finally the Multimedia or Entertainment folder.
3. Double-click on Sound Recorder. The Sound Recorder utility will appear. Make sure that you have an audio input device, such as a microphone, connected to your computer.



Figure 28: Sound Recorder Utility

4. On the Sound Recorder File menu, click New.
5. To begin recording, click Record (the button with the red dot). To stop recording, click Stop (the button with the black rectangle). To hear the file you recorded, press Play (the button with the single arrow).
6. On the File menu, click Save to save the recording to a location with a name that you will remember. Recorded sounds are saved as waveform (.wav) files.