iVR
PRO

Setup Guide

Schmooze®

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<u>Overview</u>

The IVR module allows you to create one or more IVR (Auto Attendants). You can then route calls to the IVR and play a recording prompting them what options they can enter such as "press 1 for sales and press 2 for the company directory." An IVR can also route calls to a sub IVR. As a general rule you never want more then 5-6 options in a single IVR or they become to confusing to navigate.

Logging in

Log into the IVR module and you will see a screen like this:
On the right side you will see a list of IVRs that have been created along with the ability to create new IVRs.

IVR

Add a new IVR

> **Add IVR**
> **FS-After Hours Main IVR**
> **FS-Business Hours Main IVR**
> **SC-After Hours Main IVR**
> **SC-After Hours Support IVR**
> **SC-Business Hours Main IVR**
> **SC-Business Hours Support IVR**

Creating an IVR

In our example we are going to create a new main IVR by clicking on the "Add IVR" option.
IVR General Options
IVR Name- Choose a name for this IVR, such as "Business Hours."
IVR Description- Here you can optionally set a description for this IVR.

- IVR General Options

IVR Name ❓   FS-Business Hours Main IVR

IVR Description ❓   Main IVR for business hours

- **IVR Options (DTMF)**- These are the IVR options for the DTMF version of the IVR.

  - **Announcement**- Here we choose which recording to be played to the caller when they enter the IVR. This can be any system recording that you have defined in the System Recording module. It will usually give them instructions, such as "press 1 for sales and 9 for support."

  - **Direct Dial**- Do you want to allow callers to be able to enter a user's extension number when navigating the IVR to go direct to that users extension. Your options are:
    - **Disabled**- This will not allow any caller to direct dial any extensions on the system and restrict them to only the IVR entries that you define, such as 1 for sales 9 for support.

- **Extensions**- This will allow a caller to direct dial any extension direct from the IVR on the system regardless of what entries you define in the IVR, such as 1 for sales 9 for support.
- **Directory Names**- You will get a list of all company directories that you have created on your PBX and you can restrict the direct dial to only users that are a part of the company directory that you pick here. This is a way to restrict which extensions a caller can direct dial from each IVR.

- **Timeout**- How long (in seconds) we wait for the caller to enter an option on their phone keypad before we consider it timed out and it follows the timeout rules as defined below. We recommend setting this to 4-5 seconds.

- **Invalid Retries**- How many times a caller is allowed to enter an option without finding a match before we send the caller to the Invalid Destination as defined below. We recommend setting this to 2.

- **Invalid Retry Recording**- Here we choose which recording we want played to the caller when they enter an invalid match. This can be any system recording that you have defined in the System Recording module. Setting to none will just play the main announcement again.

- **Append Original Announcement**- If this is checked we will take the Invalid Retry Recording and play it to the caller then play the main announcement.

- **Invalid Recording**- Here we pick which recording we want played to the caller when they have met the Invalid Retry count as defined above. This can be any system recording that you defined in the System Recording module.

- **Invalid Destination**- If a caller cannot find a match after exceeding the Invalid Retries as defined above this is where we will transfer the call to. In our example we are sending the caller to the general voicemail but it can be any destination on your PBX.

- **Timeout Retries**- How many times a caller is allowed to timeout without pressing any options on their keypad before we send the caller to the Invalid Destination as defined above. We recommend setting this to 1.

- **Timeout Retry Recording**- Here we choose which recording we want played to the caller when they timeout. This can be any system recording that you defined in the System Recording module. Setting to "none" will play the main announcement again.

- **Append Original Announcement**- If this is checked we will take the Timeout Retry Recording and play it to the caller, then play the main announcement.

- **Timeout Recording**- Here we pick which recording we want played to the caller when they have met the Timeout Retries as defined above. This can be any system recording that you defined in the System Recording module.

- **Timeout Destination**- If a caller cannot find a match after exceeding the Timeout Retries as defined above this is where we will transfer the call to. In our example we are sending the caller to the general voicemail, but it can be any destination on your PBX.

- **Return to IVR after VM**- If the caller ends up in a user's voicemail box after coming from an IVR it will prompt them after leaving a voicemail to press 9 to return to the main menu, which will return them back to this IVR if this option is checked.

- IVR Options (DTMF)

Announcement	FS-Business_Hours_Main_IVR
Direct Dial	Disabled
Timeout	4
Invalid Retries	2
Invalid Retry Recording	None
Append Original Annoucement	☐
Invalid Recording	None
Invalid Destination	Voicemail / <3001> (General VM) (unavail)
Timeout Retries	1
Timeout Retry Recording	None
Append Original Annoucement	☐
Timeout Recording	None
Timeout Destination	Voicemail / <3001> (General VM) (unavail)
Return to IVR after VM	☐

- **IVR Options (Speech)**- These are the IVR options for the speech recognition version of the IVR:

- **Speech Enabled**- Check this option of you want to enable speech recognition on this IVR. Please note you will also need a valid LumenVox speech port.

- **Announcement**- Here we pick which recording we want played to the caller when they enter the IVR. This can be any system recording that you have defined in the System Recording module. It will usually give them instructions such as, "for sales say sales or press 1."

- **Direct Dial**- Do you want to allow callers to be able to enter a user's extension number when navigating the IVR to go direct to that users extension? Your options are:
    - **Disabled**- This will not allow any caller to direct dial any extensions on the system and restrict them to only the IVR entries that you define such as, 1 for sales 9 for support.
    - **Extensions**- This will allow a caller to direct dial any extension direct from the IVR on the system regardles of what entries you define in the IVR such as, 1 for sales 9 for support.
    - **Directory Names**- You will get a list of all company directories that you have created on your PBX and you can restrict the direct dial to only users that are a part of the company directory that you pick here. This is a way to restrict which extensions a caller can direct dial from each IVR.

- **Timeout**- How long (in seconds) we wait for the caller to enter an option on their phone keypad before we consider it timed out and it follows the timeout rules as defined below. We recommend setting this to 4-5 seconds.

- **Invalid Retries**- How many times a caller is allowed to enter an option without finding a match before we send the caller to the Invalid Destination as defined below. We recommend setting this to 2.

- **Invalid Retry Recording**- Here we choose which recording we want played to the caller when they enter an invalid match. This can be any system recording that you have defined in the System Recording module. Setting to none will just play the main announcement again.

- **Append Original Announcement**- If this is checked we will take the Invalid Retry Recording and play it to the caller then play the main announcement.

- **Invalid Recording**- Here we pick which recording we want played to the caller when they have met the Invalid Retry count as defined above. This can be any system recording that you defined in the System Recording module.

- **Invalid Destination**- If a caller cannot find a match after exceeding the Invalid Retries as defined above this is where we will transfer the call to. In our example we are sending the caller to the same IVR but only with DTMF. This will disable speech recognition and only play the announcements based on the DTMF options as defined above. This is how we recommend setting up speech potion of your IVR so you do not leave people locked into speech only if they are having problems.

- **Timeout Retries**- How many times a caller is allowed to timeout without pressing any options on their keypad before we send the caller to the Invalid Destination as defined above. We recommend setting this to 1.

- **Timeout Retry Recording**- Here we choose which recording we want played to the caller when they timeout. This can be any system recording that you defined in the

System Recording module. Setting to "none" will play the main announcement again.

- **Append Original Announcement**- If this is checked we will take the Timeout Retry Recording and play it to the caller, then play the main announcement.

- **Timeout Recording**- Here we choose which recording we want played to the caller when they have met the timeout retries as defined above. This can be any system recording that you defined in the System Recording module.

- **Timeout Destination**- If a caller cannot find a match after exceeding the timeout retries as defined above, this is where we will transfer the call to. In our example we are sending the caller to the same IVR but only with DTMF. This will disable speech recognition and only play the announcements based on the DTMF options as defined above. This is how we recommend sending up speech potion of your IVR so you do not leave people locked into speech only if they are having problems.

- **Return to IVR after VM**- If the caller ends up in a user's voicemail box after coming from an IVR it will prompt them (after leaving a voicemail) to press 9 to return to the main menu, which will return them back to this IVR if this option is checked.

- IVR Options (SPEECH)

Field	Value	
Speech Enabledd	☑	
Announcement	Default	
Direct Dial	Disabled	
Timeout	10	
Invalid Retries	3	
Invalid Retry Recording	Default	
Invalid Recording	Default	
Invalid Destination	IVR	FS-Business Hours Main IVR
Timeout Retries	3	
Timeout Retry Recording	Default	
Timeout Recording	Default	
Timeout Destination	IVR	FS-Business Hours Main IVR
Return to IVR after VM	☐	

- **IVR Entries**
  This is where we define destinations based on callers key presses or if using speech recognition what grammars they defined.

  - **Ext**- What entry they can press on their phone to match. We recommend using only single digit entries to keep it simple for your users.

  - **Destination**- When a caller presses the "Ext" entry where are we routing the call to. This can be any destination on your PBX that you created, such as ring groups, time conditions, queues or anything else.

  - **Return**- Check this box to have this entry return the caller to whatever previous IVR they came from. This is handy to for things such as, to go back one menu press 9.

  - **Grammar**- What word the caller can speak to match this destination to. Such as sales or sales department.

  Press the Green Plus sign to add more entires to your IVR.

- IVR Entries

Ext	Destination		Return	Delete	
3	Queues	FS-Admin <4501>	☐	🗑	sales / sales department
2	Voicemail	<3005> (FreePBX Support)	☐	🗑	speech grammars
digits pressed	== choose one ==		☐	🗑	speech grammars

Tips and Tricks

Add hidden options for things like voicemail access for your employees to check voicemails remotely.

Create an Ext entry of 98 and in "Destination" choose "Feature Code" and *98 to dial voicemail. Do not prompt the caller with this option in your announcement and inform your users that in the main IVR they can dial 98 to access their voicemail. It will then prompt them to enter the extension number and then voicemail password.

98	Feature Code Admin	Dial Voicemail <*98>	☐	🗑	Check voicemail

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