

# Designing Your IVR:

## A Quick Setup Guide to Using Easy-IVR



## INTRODUCTION

Setting up a Contact Center means bringing together a number of important elements. One of those is Interactive Voice Response (IVR) systems. An IVR is what customers typically hear when calling a company – for example, “thanks for calling Acme Inc. For Sales, press 1. For service, press 2.” In essence, IVRs present a greeting, capture information, and efficiently route the call to the appropriate agents.

Easy-IVR, available on Contact Center Pro and Elite plans, simplifies the steps involved - and the interface used - to significantly streamline the process of creating an IVR, without requiring any advanced technical knowledge.

This document is not intended to serve as an exhaustive “how-to” library of creating IVRs, but rather as a go-to-guide to help with next steps, knowing where to look, and how to use Easy-IVR efficiently. It includes an overview of the requirements and best practices for using Easy-IVR to set up one or more IVR systems in your contact center.

## OVERALL PREPARATION

You can think of the elements listed below – queues, phone numbers, etc. – as building blocks for your IVR, and the Easy-IVR wizard as an assembly line. The more blocks you have prepared in advance, the shorter your build time is likely to be.

To deliver an optimal experience, you first need to understand how you want customers to interact with agents, and where you want callers to go. It’s best to give some thought to your call flow before starting.

### Example Scenario:

- You run a healthcare clinic.
- Callers have several common needs: book an appointment (the most common), locations and hours, and contact the Pharmacy team.
- The Pharmacy team is an outside group, at a different phone number.

### Using Easy-IVR, you could create an IVR that:

- Routes appointment requests to the appropriate agents;
- Reads out a prompt that answers common questions such as hours and location; and
- Sends calls for the Pharmacy team to the external phone number.

## QUEUES

The cornerstone of most IVRs, this is the most common option for connecting callers to agents. In essence, a queue receives an inquiry, maintains the caller’s place in line, and delivers the call to an agent as soon as one is available.

There are two ways to use queues in Easy-IVR: by selecting from queues that are already built (via your Contact Center admin interface), or by creating queues on the fly in Easy-IVR. You can use Easy-IVR to add as many queues as needed to your IVR instance. Your only limitation is the number of buttons on the phone keypad, namely nine (9).

## PHONE NUMBERS

Phone numbers can be used for several purposes in an IVR. Some Contact Centers may require DIDs for functions such as blind transfer to outside parties. You might use this, for example, if you have a secondary group that fields sales calls after hours.

## PROMPTS

Prompts are simply recorded audio files, which must be provided in WAV format. It's best to have a collection of pre-recorded prompts to cover all levels and options in your IVR. Here's a list of the basic prompts you're likely to need; your deployment may require additional files beyond these.

- **Welcome prompt.** To introduce the company.
- **Language menu prompt.** If your IVR will offer multiple languages, this prompt will explain the options to the caller, and prompt them to make a selection.  
*\*Special note - Using multiple languages will increase the number of prompts required. Each prompt (other than the Welcome and Language menu prompts) will need to exist in every available language.*
- **Main menu prompt.** Once the caller has made a language selection (or if there is only one language), they'll arrive at the main menu. This is where you'll present them with options to get to the person or department they need. Another common example is "Press 1 for Sales, 2 for Support, or 3 for Billing." Easy-IVR will allow you to enter multiple options, from 1-9 (corresponding to the caller's keypad).
- **After-hours prompt.** For when some or all queues are closed and outside of regular hours.
- **No agents prompt.** For cases where the caller is able to dial in during regular hours, but no agents are available. This is usually considered an emergency situation, or at least an unexpected one, e.g. a fire drill, local network outage, or some other unexpected event that is preventing the agents from logging into the software.

You can overwrite the audio files later, from the Prompt Files page (Configure > General > Prompt Files).

## PROMPTS – DESCRIPTIONS

For each prompt, you'll be asked to enter a description. While it can be just a few words, we recommend you include enough detail to easily tell the prompts apart and know what fits where.

## SCHEDULES

The default value is 24/7, but if your Contact Center requires schedules, you'll need to have them defined in advance. You can do this via Configure > General > Working Hours.

In Easy-IVR, schedules can be applied to the main menu and to any queues that exist. If you have additional queues for different languages, each of them can have its own schedule.

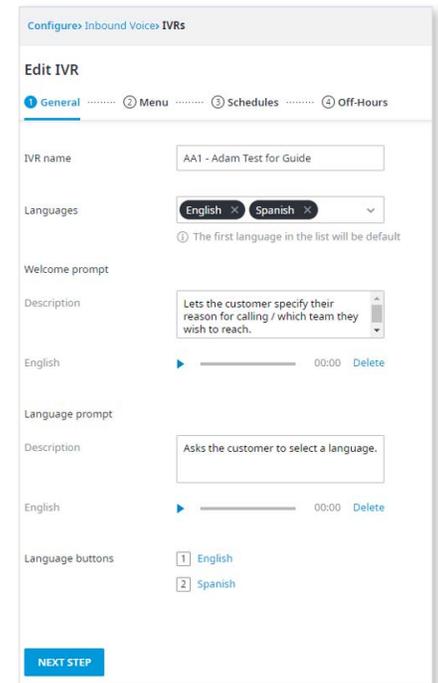
Note that if you chose to leave the hours as 24/7, the no agents message will play when the contact center is closed. Create an appropriate prompt for that situation.

## EASY-IVR STEPS

New vs. existing IVRs: If you're creating a new IVR, click "Create New IVR" button. To edit an existing IVR, click the Pencil icon, which will be available if your IVR was created via Easy-IVR. After that, the steps are virtually identical. For more detail see "Optimizing an Existing IVR."

### 1 | General

- A) Give your IVR a name.
- B) Specify language(s). Note that the language selection will put the user on a "track" of sorts, wherein the options and prompts they'll hear will be in the chosen language only. However, the user can always press the pound key to return to the previous level and choose a new language. Also note that using multiple languages will increase the total number of recorded prompt files.
- C) Provide the description for your Welcome prompt.
- D) Upload the recorded prompt file.
- E) *(If multiple languages will be used)* Set a selection button for each applicable language.



### 2 | Menu

Here you'll specify the main menu options, what/who they connect to, and what keys the user will press to select each option. You'll first enter the following:

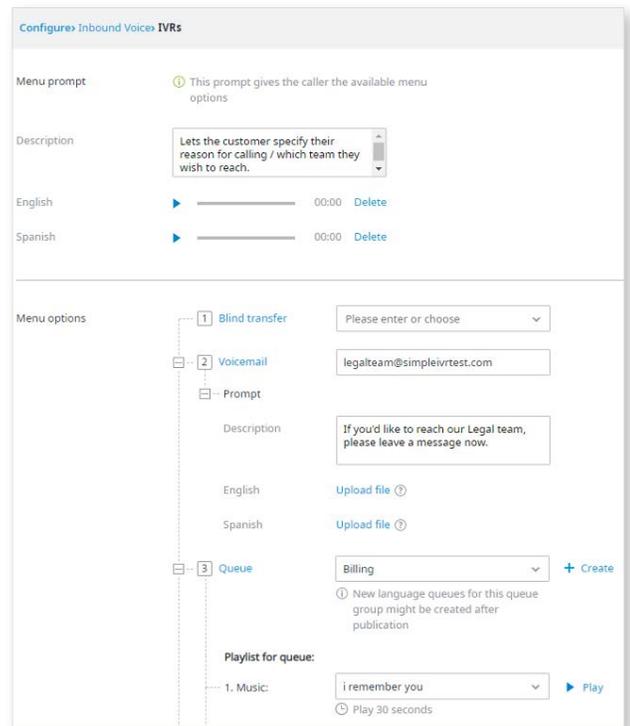
- A) Menu prompt - Description.
- B) Menu prompt - Upload WAV file for each language in use.
- C) Set up menu options. Each numerical option corresponds to the key the caller will press to make a selection. As an example: "Press 1 for Sales, 2 for Support."

Next you'll move to Menu Options.

There are three possible actions for each menu option:

- Queue
- Blind Transfer
- Voicemail

Not Setup is a fourth option that means that keypad selection is invalid. Nothing will happen if the caller chooses an option that's configured as Not Setup.



**The Queue option** will transfer to the selected queue. This is the most common option, and requires the following elements:

- Queue selection** - Pick a queue. Or if no queue has been created yet, click the + button to create a new queue on the fly. Any queue you generate here will be available in future IVRs.
- Playlist for queue** - Choose initial music track (these are populated by the system), the prompt description, and the recorded prompt file for each language. Repeat this process for the on-hold music, the on-hold prompt description, and the on-hold prompt files in each language. The only available playlist is 30 seconds music, prompt, 30 seconds of music, prompt, repeat. Each prompt can be different, or the same file can be uploaded in both prompt slots.
- Blind transfer** sends the call to a number from your DNIS list or a new one that you enter manually. This could, for example, be a third-party team that handles calls under certain conditions, or perhaps a different location / branch.

**Voicemail** plays a provided prompt. Again, you'll need a description, plus a WAV file for each language. VM then records the caller's message, and sends it to an e-mail address of your choosing.

**Not Setup** means this option, and the corresponding keypad number, are not in use. As an example, if the 6 key was flagged as Not Setup, the user pressing 6 would have no effect.

*\*Note: The pound (#) key is reserved for the "Return to previous menu" function.*



### 3 | SCHEDULES

Here you'll select the schedule to use for the main menu, as well as any queues you selected in the previous step.

Specify the schedule to use for the main menu. The default value is "Open 24/7."

For any queues you've selected in Step 2, you'll need to specify schedules.

If you're using different languages, you have the option to select a different schedule for each queue.

As an example, the Billing queue could use "Regular weekday" hours for the English option, and "Extended Pacific hours" for the Spanish option.

This way you can close your entire IVR if call queues are closed, preventing callers from needing to make a selection. You can also close only certain selected queues, allowing callers to reach the menu in the event that at least one queue is open.

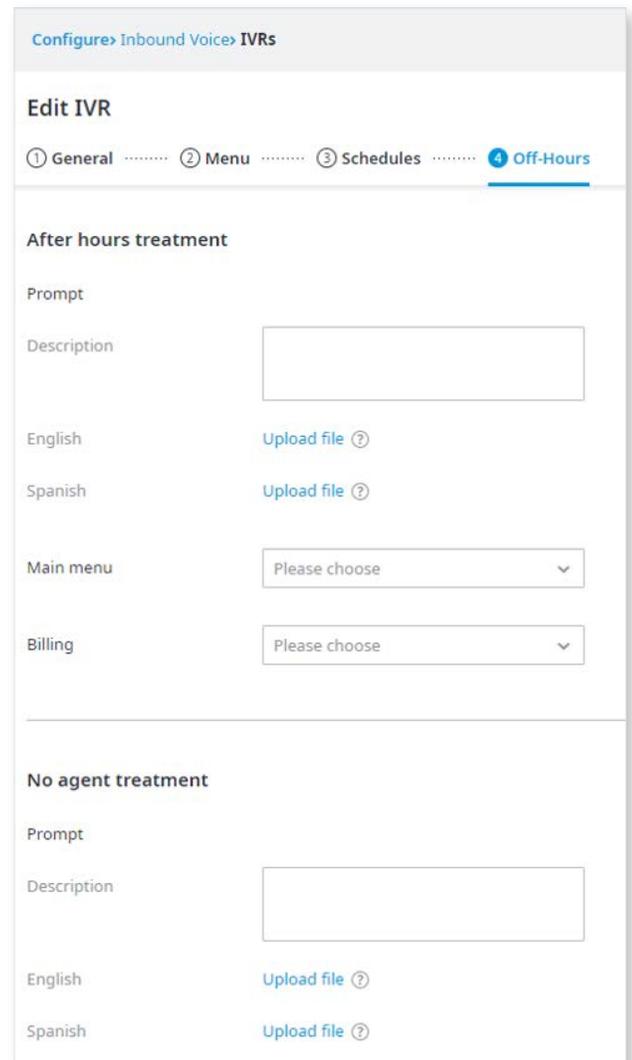
The screenshot shows the 'Edit IVR' configuration page with the 'Schedules' tab selected. The page is titled 'Configures Inbound Voice IVRs' and 'Edit IVR'. There are four tabs: 'General', 'Menu', 'Schedules', and 'Off-Hours'. The 'Schedules' tab is active. Under 'Main menu', there is a dropdown menu set to 'eastern seaboard office schedule' with a sub-note 'current schedule: Open 24/7'. Under 'Billing', there are two entries: 'English' with a dropdown set to 'Weekday' and 'Spanish' with a dropdown set to 'eastern seaboard office schedule', both with sub-notes 'current schedule: Open 24/7'.

## 4 | OFF-HOURS

There are two components to this final step: After-hours treatment, and No agent treatment. The first applies when callers attempt to dial in outside of the schedules you set in Step 3; the second applies when the current time is within business hours, but the caller arrives in a queue that currently has no agents.

For both conditions, the requirements are the same:

- A) Provide a description of the prompt to play.
- B) Upload the recorded prompt file, for each language if applicable.
- C) Choose a behaviour for each queue you've set up:
  1. Blind Transfer
  2. Voicemail
  3. Hang up



Configure > Inbound Voice > IVRs

### Edit IVR

① General ..... ② Menu ..... ③ Schedules ..... ④ Off-Hours

#### After hours treatment

Prompt

Description

English [Upload file ?](#)

Spanish [Upload file ?](#)

Main menu

Billing

---

#### No agent treatment

Prompt

Description

English [Upload file ?](#)

Spanish [Upload file ?](#)

## 5 | PUBLISH!

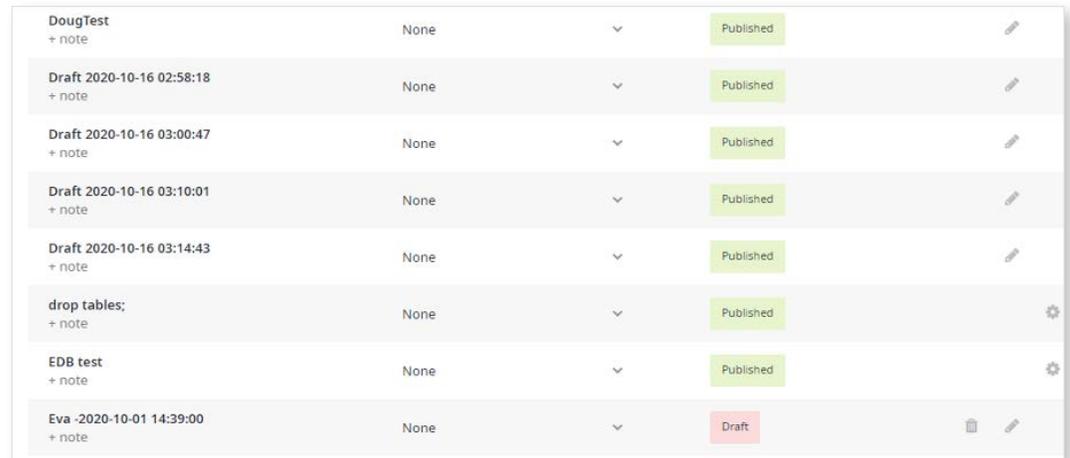
Once you've specified the behaviour for both conditions and all queues, you'll be able to Publish. Easy-IVR will now check your work for any potential issues.

If a problem is found, the wizard will call it to your attention via on-screen text in a conspicuous colour. You can go back through each step, addressing issues as they appear, without losing any of your work. Upon successful publishing, your new IVR should be live in a matter of minutes!

## OPTIMIZING AN EXISTING IVR

In most cases, changing an existing IVR will require less preparation. This section therefore omits elements such as writing prompt descriptions and uploading recording files.

To edit an existing IVR, start at the same page: Configure > Inbound Voice > IVRs. Please see the below screenshot for reference.



DougTest + note	None	▼	Published	
Draft 2020-10-16 02:58:18 + note	None	▼	Published	
Draft 2020-10-16 03:00:47 + note	None	▼	Published	
Draft 2020-10-16 03:10:01 + note	None	▼	Published	
Draft 2020-10-16 03:14:43 + note	None	▼	Published	
drop tables; + note	None	▼	Published	
EDB test + note	None	▼	Published	
Eva -2020-10-01 14:39:00 + note	None	▼	Draft	 

Existing IVRs that were created via Easy-IVR can be edited here. They will show a **Pencil** icon, and will have a status of either Published or Draft.

IVRs that are still in Draft mode can be deleted; once an IVR is published you can still edit it but not delete it.

Note that IVRs showing a **Gear** icon were created in the IVR Studio tool; while you can see them in the list and make changes to their Advanced Settings, these IVRs cannot be edited via the Easy-IVR interface.

Once you click the Edit icon, the steps for optimizing your existing IVR will be essentially identical to those listed in the above section. You can follow those steps starting from **1 – General (Pg 4)**.