

Introductory User Training

Intro User Training Manual

©2004 Technology For Business
1112 Ocean Drive • Suite 202
Phone 310.491.3800 • Fax 310.372.5486

Introduction to TFB

- About TFB
 - Getting Support
 - Important Basics
 - System Overview
 - Software Overview
-



About TFB

TECHNOLOGY FOR BUSINESS

What We Do

- **Software Developer**
Packaged and custom CTI Applications for NEC NEAX, Nortel, Avaya, and Mitel PBX/ACDs
- **Type of Software**
CTI, IVR, Multimedia, Middle-ware
- **Vertical Markets**
Not just call centers – Government, Healthcare, Education, Manufacturing, Hospitality, Retail...

Why TFB?

- **Integrated and Redundant**
Not just another add on to NEAX – a fully Integrated solution and enhancement platform
- **NEAX Expertise**
Extensive Infolink Integration experience. Helped *design* Infolink. Products developed in partnership with NEC America.
- **Open Architecture**
Open Data and Open API Helps protect users investment.

TFB Product Benefits



- **Improved Customer Service**
 - Improved Staff Efficiency
 - Offer callers options in queue
- **Costs Savings**
 - Measurable ROI
 - Automation of Repetitive Tasks and transactions
- **Investment Protection**
 - Open Data, Open API
 - Technology Migration
 - Option to choose best of breed systems
- **Reliability**
 - Proven, field tested Products
 - Redundancy with ACD

TFB Design Philosophy

- **Tightly Integrated Functionality**
- **NEC Fusion**
- **Industry Standard Components**
- **Enhance ACD Functionality**
- **Do not supercede or disrupt ACD activity**



Quick Facts

Do Not Supercede or Disrupt ACD Activity – This is how TFB applications are designed. CTI Server or its applications cannot Reset the ACD, or over write ACD programming. More about this in the **Troubleshooting Module**.

Who Uses TFB? Sample Users

- **Transportation**
 - Japan Airlines
 - BC Rail
- **Hospitality**
 - Luxor Hotel and Casino
 - Las Vegas Hilton
 - Mandalay Bay Hotel and Casino
 - MGM Grand Hotel and Casino
 - and many more!
- **Print Media**
 - San Diego Union Tribune
 - Investor's Business Daily
- **Colleges and Universities**
 - University of California Davis
 - Vanderbilt University
 - Rio Solado College
- **Government**
 - Los Angeles County
 - City of San Diego, Placer County, Orange County,
 - City of Surrey...
- **Others – Haband, Americorp, Warner Bros, Van Dorn DeMag, Adidas Taylor-Made, Las Vegas Hilton, Time Warner, Mandalay Bay Hotel and Casino and hundreds more!**

TFB FACTS REFERENCE

- *Technology for Business (TFB)* was established in 1991, incorporating the marketing and technology expertise of the founding principals with the successful application software firm, G&M Systems.
- TFB offers turnkey and custom applications for call centers of all sizes, across all vertical markets. TFB's *Call Center Suite* product line includes *Automated Callback*, *Call Center Routing*, *Screen Pop*, *Web Chat*, and *eMail* (integrated to the call center). All applications are designed to run on TFB's *CTI Server™* and *Media Server* platforms.
- In addition to *Call Center Suite*, TFB offers a full suite of healthcare applications for hospitals and HMO's, including the *Patient Accounts Manager*, *Express Pharmacist*, and *Patient Appointment Reminder*. All healthcare applications are designed to run on TFB's *CTI Server* platform.
- TFB offers full turnkey installation of the *CTI Server* platform and associated applications.
- *Systems Integration* - TFB provides systems and software integration services for CTI, IVR, Voice Processing, Web, Email, Data Processing, and Network environments.
- For customers under warranty, TFB provides 24-hour, emergency telephone support for systems and software, with emergency on-site service where required.

The Power of the NEAX + TFB Solution

Not Just an Add-On IVR

- Opens applications to all features of the ACD through Infolink, provides comprehensive reporting across ACD, CTI, IVR...
- Matches or exceeds capabilities and features of Avaya and Nortel
- Leading edge Routing Options, GUI Administration Tools Interface, and Integration with Email, Web Chat, Web Callback
- Far Exceeds Features and capabilities of Data Model solutions



Getting Support

Who Supports which systems

- **TFB or your dealer for CTI Server and Media Server critical bugs**

- **Your dealer for ACD, voice mail, voice recording**

- **Your organization supports usual server maintenance on CTI Server and Media Server**
 - **Virus and Security**
 - **OS Upgrades**
 - **Backups – the TFB folder, SQL**

How to Contact TFB

- **Through your Dealer, as arranged**

- **support@tfbc.com and www.tfbc.com**

- **Toll Free 877-612-4832**

When to Call

- **Callers not hearing messages or getting to applications**
- **Upgrading the Switch**
- **Changing a Database – Passwords or access**
- **Relocating Equipment**
- **Questions**

Response

- **Email is best – typical first response within 15 minutes**
- **Support is via remote access**
- **Be sure to leave all contact information, and details about the problem**

Important Basics

ACD Vocabulary – Pilot or DNIS

- **The unique ROUTE or DESTINATION of a particular call in the switch**
- **A pilot is specified by a 3,4,5, or 6 digit number in the switch**
- **Multiple calls could follow the same pilot**
- **HOWEVER – Each call can only be assigned to a single pilot at a time**
- **Why is Pilot important?**
- **Several TFB applications can be configured by pilot**
- **Some reports identify calls by pilot**



ACD Vocabulary – CCV

- **CCV or *Call Control Vector***, is the script or program inside the ACD that describes how to handle calls on a particular Pilot in the ACD
- There can be multiple CCVs, each used by any number of Pilots
- Each pilot uses a single CCV that determines how calls are handled by that pilot

Typical Call CCV

```
1 Pause 6  
2 Queue to 1  
3 if ETA > 30  
4 @IVR announce 9  
5 pause 10
```

- To route calls to CTI Server, a single CCV step is used that determines how calls are handled by that pilot

@IVR announce 9

TFB Vocabulary – Voice Ports

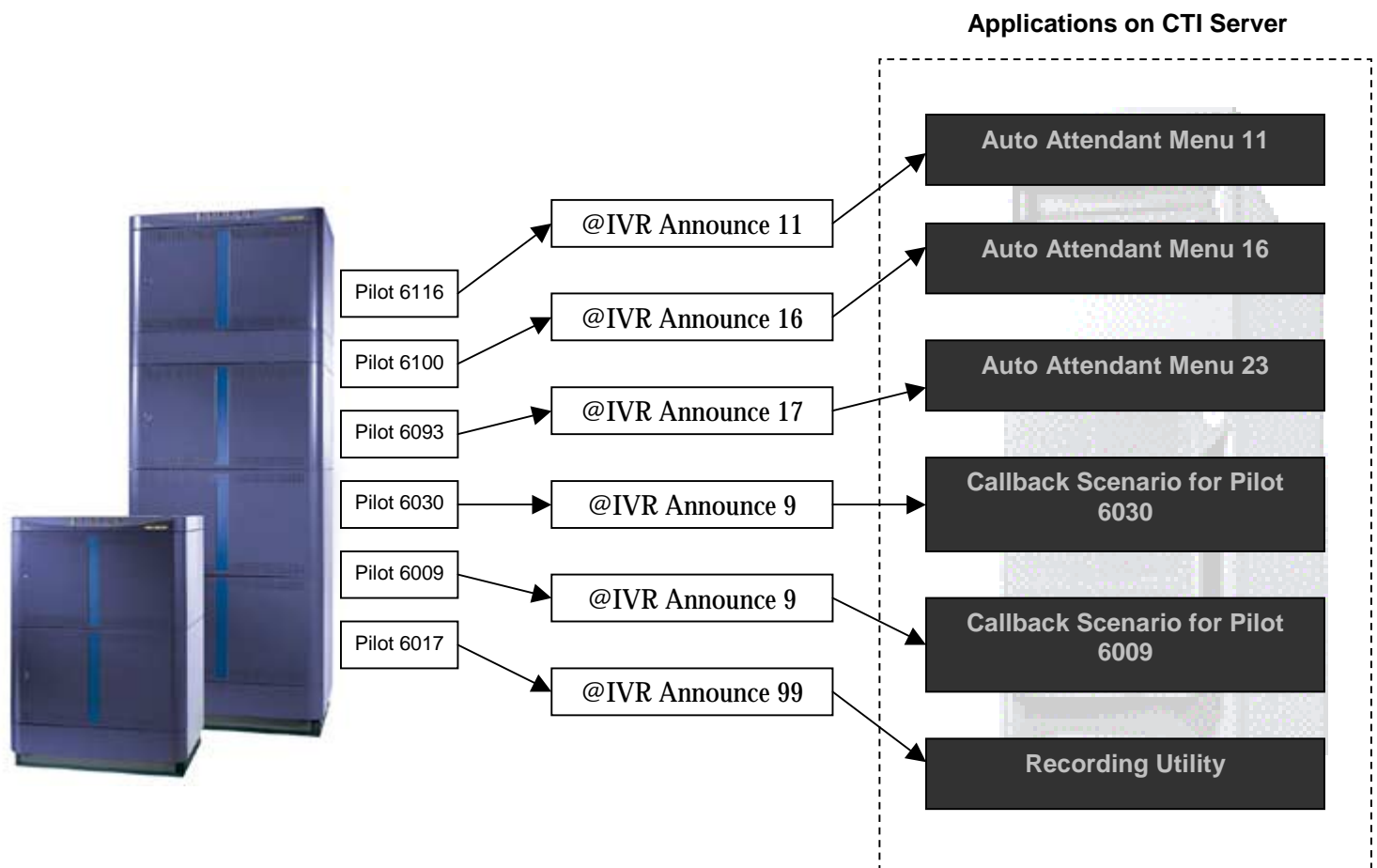
- **Voice ports, or IVR ports, provide the physical voice interface between CTI Server and the ACD**
- **Voice ports can be analog, T1, or VoIP**
- **Voice ports allow applications to speak messages to the caller, and get touch tone input from the caller**
- **Voice ports are like phone extensions**
 - **Allows voice and DTMF communication between the caller and CTI Server**
 - **Only a single caller uses a voice port simultaneously**
- **KEY CONCEPTS**
 - **Calls are transferred to voice ports from CCVs**
 - **A call that is queued before transferring to a voice port REMAINS queued, and goes to an agent as soon as an agent is available!**

TFB Vocabulary - Configure By Pilot

- The **CCV or *Call Control Vector***, for any pilot or DNIS can direct those calls to unique applications on CTI Server

OR

- The **CCV or *Call Control Vector***, for any pilot or DNIS can direct those calls to the same application with a unique configuration!



REVIEW – IMPORTANT BASICS

ACD Vocabulary – Pilot

- **The ROUTE or DESTINATION of a particular call**

ACD Vocabulary – CCV

- **CCV or *Call Control Vector*, is the script or program inside the ACD that describes how to handle calls on a particular Pilot in the ACD**

TFB Vocabulary – Voice Ports

- **Voice ports, or IVR ports, provide the physical voice interface between CTI Server and the ACD**

TFB Vocabulary – Configure By Pilot

- **The CCV or *Call Control Vector*, for any pilot or DNIS can direct those calls to unique applications on CTI Server**

System Overview

What Your ACD Does

- **Manages delivery of calls to agents**
- **Manages agent logon states**
- **Speaks messages to callers**
- **Routes callers according to Pilot**
- **Reports on ACD activity**



AND...

- **Provides an industry-leading CTI Link, *Infolink*, for enhanced features, applications, and integration to external systems**

What TFB can do – ACD Enhancements

- **Offer options to callers in queue**
 - Callback when an agent is free
 - Callback at a Particular time or during next business day

- **Integrate Multimedia Contact Channels**
 - Email queues for call center agents
 - Web chat for call center agents
 - Internet callback

- **Automated Call Handling**
 - Route calls base on caller ID
 - Route email and chat sessions to agents
 - Let callers route themselves

- **Real time Monitoring**
 - Queue status when an agent is free
 - Agent status at a Particular time
 - Alarms based on agent and queue thresholds

- **Reporting**
 - ACD Reports** Archival cradle-to-grave drill down reports across the ACD and IVR.
 - Standard Log Server
 - Integration to call recording systems

- **Screen Pop and Desktop Integration**
 - Peoplesoft, Oracle
 - Basic call info

What TFB does NOT do

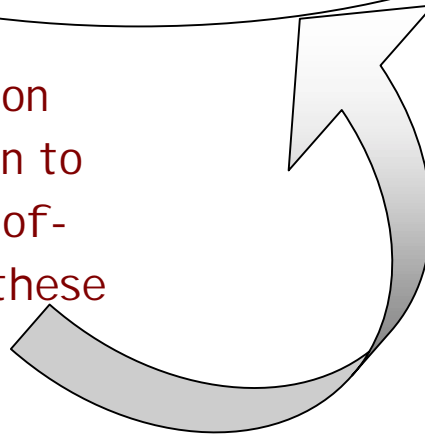
- **Systems we don't provide**

- ACD
- Voice Mail
- Call Recording
- Web development
- POP3 and standard enterprise-wide Email

- **But we will integrate the call center with...**

- Your preferred ACD
- Your preferred Voice Mail system.
- Your preferred Call Recording system.
- Your Web site
- Your POP3 Email server

Your organization
retains the option to
select the best-of-
breed solution in these
categories

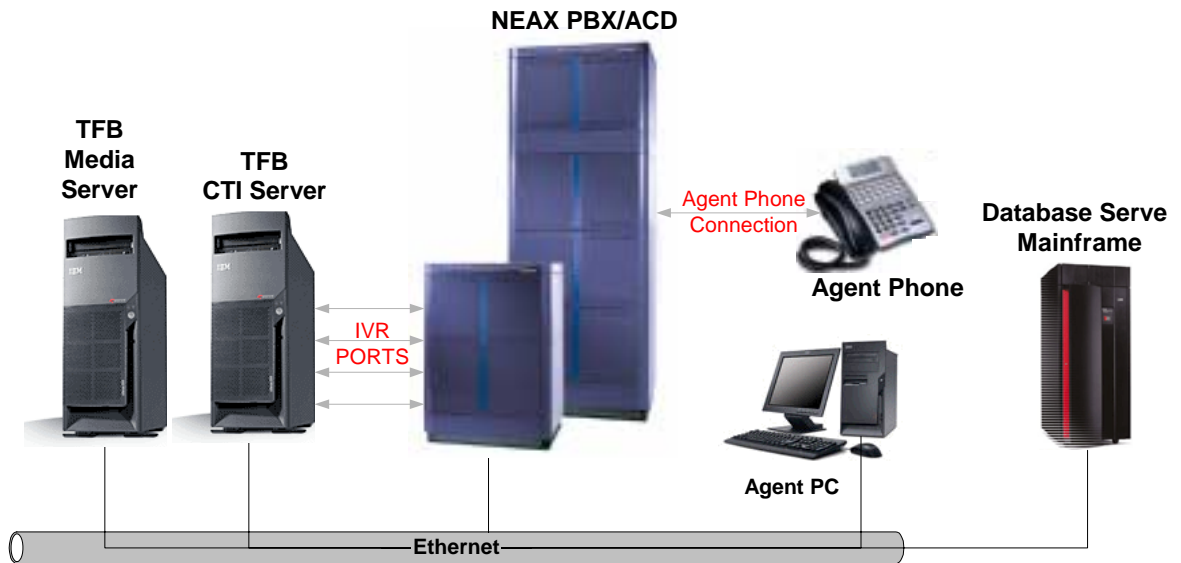


Where the TFB Servers Fit

- **Windows-based Server(s) on the LAN**
 - **CTI Server**
 - **Media Server**

- **CTI Server Data Connection to NEAX ACD**
 - Infolink- a two way message passing protocol

- **CTI Server Voice Connection to NEAX ACD**
 - Voice Ports – Analog or T1 phone extensions to a Dialogic board in CTI Server



Software Overview

What Platform for Each Application

- **CTI Server**
Routing – Like Auto Attendant
Call Handling – like callback
IVR – Custom or Vertical applications
- **Media Server**
Email Integration – Agent eMail
Web Chat – Agent Chat
Enhanced Reporting – ACD Reports

Purchase Model and Requirements

- **Applications run on either CTI Server or Media Server**
- **Some applications use clients that run on the agent or supervisor pc**
- **CTI Server applications typically sold by IVR port**
- **Media Server applications, typically sold by agent seat**

NOTES



Software Applications and Server Platforms

- TFB Packages Software Applications
 - TFB Vertical Software Applications
 - TFB Server Platforms
-

TFB Software Applications

Technology for Business offers software applications for use with CTI Server and Media Server. Application solutions are offered not just for call centers but for all vertical markets from Government to Healthcare to Education, Manufacturing, Hospitality, Retail, and More.

ETA / Queue Position (ETA-Estimated time to agent)

Runs on – CTI Server | Shares IVR Ports with other applications

- **Announces Queue Position and/or ETA to callers**
- **Configurable by pilot**
- **Provision for custom introductory announcement**

Enhanced Automated Attendant

Runs on – CTI Server | Shares IVR Ports with other applications

- **Multi-level, multi-lingual capable auto attendant**
- **User-configurable**
- **Configuration to lets you assign functions to any touchtone key: transfer, hang-up, go to another menu, backup one menu, play an announcement**
- **Up to 89 distinct announcements**
- **Includes Dial By Name system**
- **Easily record new announcements from any phone**
- **Enable, inhibit, and manage announcements from the ACD**

ASAP Callback

Runs on – CTI Server | Shares IVR Ports with other apps | Requires 2nd hunt group

- **Callers can opt not to hold, and instead be called back by the first available agent.**
- **Reporting functions record total inbound toll time saved**
- **Simultaneous toll cost savings and improved customer satisfaction**
- **Provision for custom introductory announcement**
- **Configurable by pilot**

Scheduled (Future) Callback

Runs on – CTI Server | Shares IVR Ports with other apps | Requires 2nd hunt group

- **Callers can specify the preferred time and day for callback.**
- **Reporting functions record total inbound toll time saved**
- **Simultaneous toll cost savings and improved customer satisfaction**
- **Provision for custom introductory announcement**
- **Configurable by pilot**

Internet Callback

Runs on – CTI Server / User Web Site

- **Internet users can initiate a callback from your company's web site.**
- **Internet callbacks go into the ACD queue**
- **Multiple topics allowed**

Automated Transcriptions

Runs on – CTI Server | Shares IVR Ports with other apps | Requires 2nd hunt group

- **Callers can reply to a pre-configured set of questions with touch tone input or voice**
- **Configurable by pilot**

Automated Outbound Campaigns

Runs on – CTI Server also IVR campaigns require reserved ports

- **Automated outbound dialing based on an existing customer database**
- **Conduct multiple, simultaneous IVR or Agent campaigns**
- **Manual override of any campaign**
- **Route calls to specialized splits/agent groups**
- **IVR Ports must be reserved for IVR type campaigns**

Enhanced Call Center Routing

Providing integrated ANI Routing / ANI Matching / ANI Tracking functions

Runs on – CTI Server

- **Tag calls for eventual Screen Pop**
- **Route calls based on caller database resident on CTI Server**
- **Route calls based on a previous Agent Personal Pilot**
- **Area-code/DNIS-based routing options**

Skills-Based Routing

Runs on – CTI Server

- **Allows supervisors to give agents an A B C type grade in each skill**
- **Routes calls based on highest-graded available agent**
- **Requires reserved splits in ACD for skill level definition**

Alarm Manager

Runs on – CTI Server or another server on the LAN

- **Monitors critical system functionality such as database connectivity and CTI Server activity**
- **Sends email to predefined recipients based on alarm conditions**

ACD Reports

Runs on – CTI Server

- **Comprehensive cradle-to-grave historical reporting across ACD, CTI, IVR**
- **GUI, Thin-client browser gives users access to visual reports**
- **Open database gives users access to raw report data**
 -

Agent Workstation Products

Call coordinated Screen Pop

Runs on – CTI Server / Agent PC

- **Provides basic call information – ANI, DNIS, account, name**
- **Provides integration pathway for screen pop of existing desktop application, ie CRM, Helpdesk, Order entry, contact management apps**

Visual ACD Display

Runs on – CTI Server / Agent PC

- **Integrated queue/agent status displays anywhere on the LAN**

Visual ACD Supervisor

Runs on – CTI Server / Agent PC

- **Drag and Drop call between queues**
- **Integrated queue/agent status displays anywhere on the LAN**
- **Should be installed only on internal ACD**

Agent eMail

Runs on – Media Server / Agent PC

- **Thin-client allows e-mail agents anywhere on the LAN**
- **Delivers email to agent queues for efficient handling**

Agent Chat

Runs on – Media Server / Agent PC

- Multiple chat sessions with web customers
- Agents chat with other agents on 'PBX' chat line
- Supervisor monitor feature



Figure. Agent Interface for Chat

Vertical Market Applications

Vertical Market Applications – Utility and Energy

Emergency Outbound Notification

- **Dials outbound to notify key personnel by phone or pager**
- **Users – Enron, Northern Natural Gas**

Payment Outlet Locator

- **Allows callers to locate a payment center by zip code**
- **Speaks address and directions of closest locations**

Vertical Market Applications – Government

Jury Duty Manager

- **Allows callers to get jury instructions based on ID**
- **Allows callers to request postponements and excusals**

Tax Collection Info and Payment

- **Speaks callers tax information and**
- **Provides options for payment by credit card**

Satisfaction Survey

- Lets callers respond to survey questions via touch tone
- Report survey results with option to automatically email

Vertical Market Applications – Healthcare

Appointment Reminders

- Dials automated outbound calls to remind patients of scheduled appointments
- Leaves message on voice mail, reports on patients who answer and acknowledge appointment

Express Pharmacy Refill

- Allows callers to request refill through automated application

Satisfaction Survey

- Lets callers respond to survey questions via touch tone
- Report survey results with option to automatically email

- **Vertical Market Applications – Banking and Finance**

Account Inquiry

- **Lets callers access account balance information from multiple accounts**
- **Menu options for branch locations, general information, and transfer to specific agent groups**

Vertical Market Applications – Other

Custom Applications

- **Full IVR and CTI functionality**
- **Integration with turnkey features**
- **Integration with existing database and agent desktop applications**

Server Platforms

Technology for Business software runs on one of two servers, depending on the application. CTI Server hosts telephony applications, while Media Server hosts multimedia applications and ACD Reports.

CTI Server Platform

- **Windows 2000 based server running Dialogic telephony drivers**
- **Uses multiple server for more than 36 ports – ie 36 ports on the first server**
- **IVR ports provided by Dialogic cards only LAN connection**

Media Server

- **Windows 2000 based server running IIS**
- **Uses SQL Server 2000 as database for configuration and ACD Reports archive**
- **No IVR ports, only LAN connection**

Which Applications for Which Server

- **CTI Server**

- **ETA/Queue Position**
- **Callback – ASAP, Scheduled, Internet**
- **Automated Attendant**
- **Enhanced Call Center Routing**
- **Screen Pop***
- **Outbound Campaigns**
- **Automated Transcriptions**
- **ACD Reports***
- **Visual ACD Supervisor***
- **Skills Based Routing**
- **Custom IVR and CTI**
- **Most vertical market applications**

- **Media Server**

- **Agent eMail***
- **Agent Chat***
- **ACD Reports***

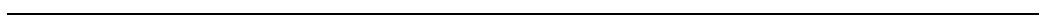
* These applications also have client components that run on agent PCs

Module

3

BASIC SERVER ADMINISTRATION

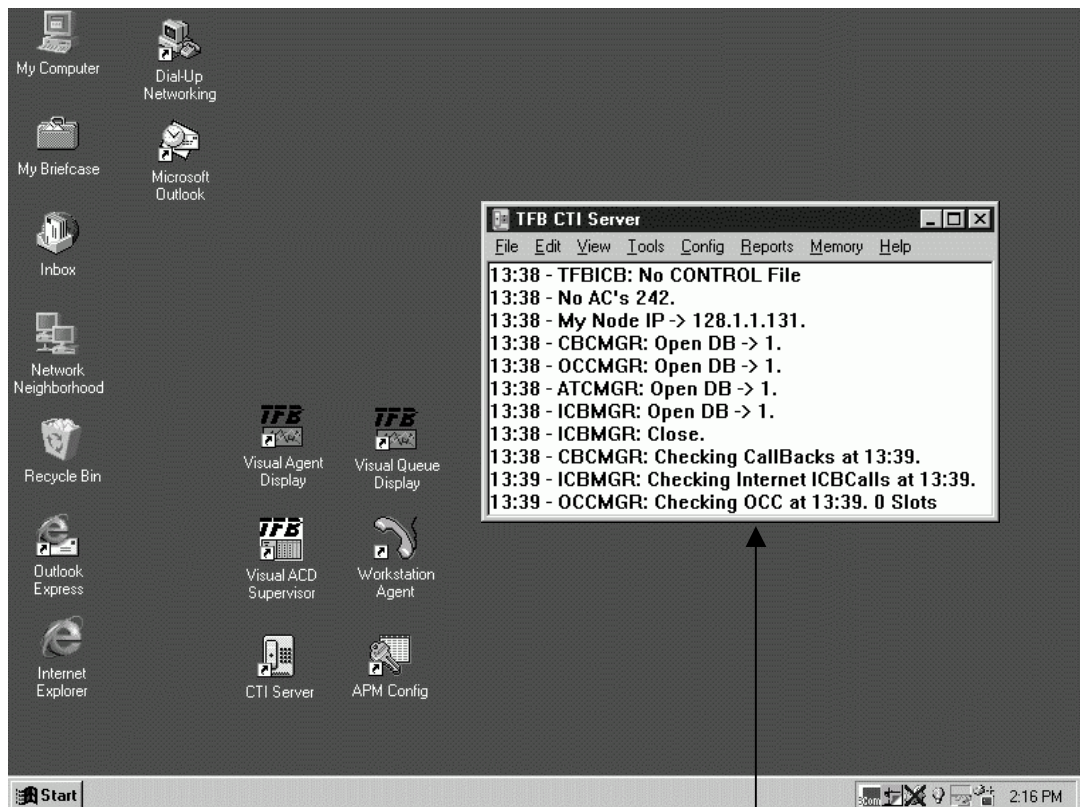
- TFB Server Desktop
- Maintenance Tasks



Server Desktop

The CTI Server Window

- This is the **MASTER** application. Start and stop the system with this application
- Access built-in reports from the CTI Server Window



CTI Server Master Window

Application Icons

- Access TFB Configuration Database

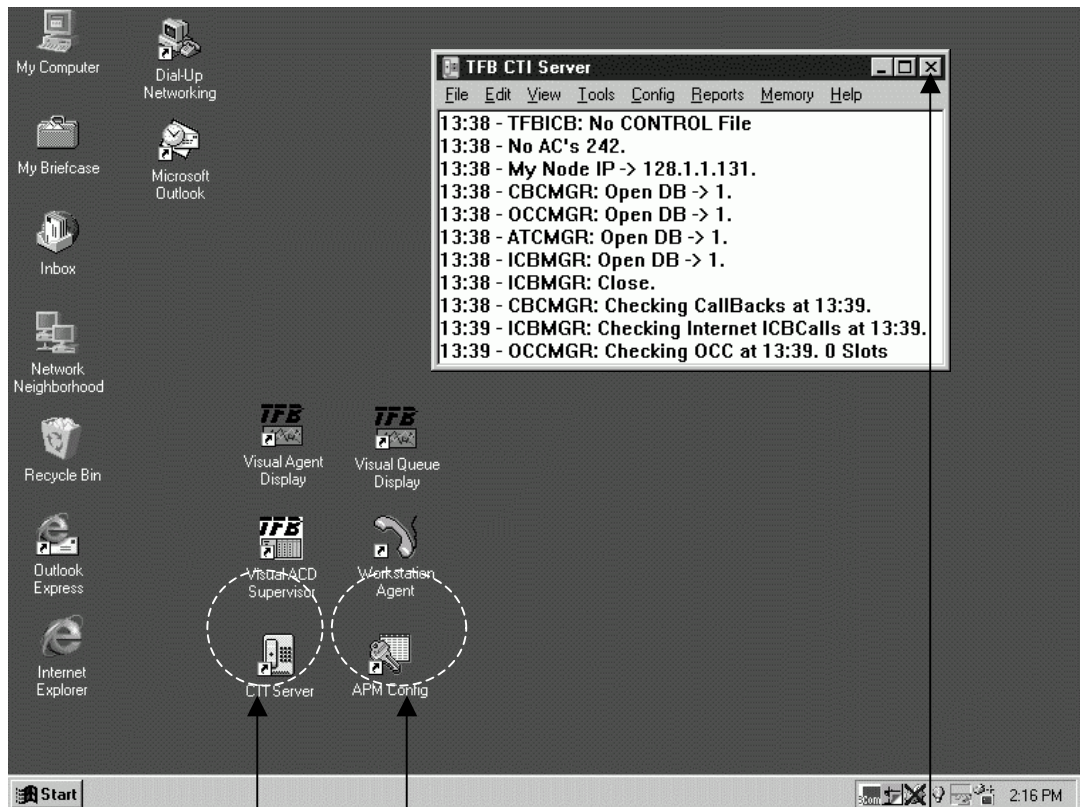


APM Config

- Start TFB CTI Server



- This starts ALL CTI Server applications



Start CTI Server

Stop CTI Server

Open CTI Server
configuration Tool

The VOS Display

- Shows state of each IVR port
 - Onhk – On hook
 - Ring – Call ringing on that port
 - Ans – Call is active on that port
- Also displays a log of activity
- Starts automatically when CTI Server is started

The screenshot shows a window titled "VOS Display" with a blue background and white text. At the top, it displays "Voice Operating System 1000000 bytes free" and the date/time "08/06/03 11:19:24". Below this, there are two status indicators: "01 Onhk" and "02 Ans", with "02 Ans" highlighted in black. The main area contains a log of system events and call activity:

```

030006 111857 VOS Started
UMGR : Iconic No. - 5 37175
UMGR : IPB Code - 6049
UMGR : MDrive -> C
UMGR : CDdrive -> C
UMGR : MSDrive -> C
UMGR : Start Port -> 000
UMGR : CB Start Port -> 001
UMGR : Fax Start Port -> 999
UMGR : EOF for Ports Reached.
UMGR : No Lines 2
Line 1 Port: 000,001,999 0006 111857 CCC 0 0
Line 2 Port: 001,001,999 0006 111857 CCC 0 0
Line 2 Ringing on 0006 at 11:19
Line 2 Provider Auth 1
Line 2 MF Sending 001,010,001,123456,
Line 2 MF Got 999,
    
```

At the bottom of the window, it says "CTL+BREAK to Exit".

Maintenance Tasks


How to Back Up CTI Server

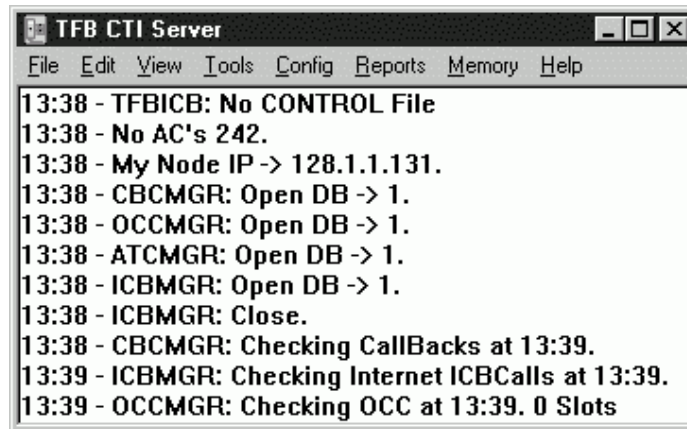
- **Simply copy “TFB” folder to Tape, across LAN, to CD, or according to the policies and procedures of your organization**
- **It’s preferable to backup all folders and files while CTI Server is NOT in production**

When to Back Up CTI Server

- **Backup to save configuration changes and recordings**
- **Make backups after recording prompts**
- **Keep a CD Copy of TFB Software on hand**

Restarting the Server

- Bring down the CTI Server down by clicking on the window close button  in the upper right-hand corner of the window. To confirm shutdown, click OK.
- This will bring down all the TFB programs/windows needed in your system.



- To restart the CTI Server click on the CTI Server icon in the TFBAPM Program Group. This will bring up all the supporting programs needed to run your system.
- This will also read all configuration parameters that have changed from the last startup.
- From a cold boot, you must sign on to Windows NT (CTRL + ALT + DELETE) and there is no password configured so just hit ENTER and start the CTI Server Applications as outlined above.
- **NOTE** THE CTI SERVER WINDOW MUST BE CLOSED AND STARTED IN THE ABOVE MANNER BEFORE ANY CONFIGURATION CHANGES TAKE PLACE.
- **NOTE** CTI Server can be setup to restart and logon *automatically*.

Applying Windows Updates to CTI Server

- **IMPORTANT Do not use automatic Windows update feature**
- **Apply updates per your policies and procedures**
- **Restart server only after all ports show OnHk in the VOS Window**
- **Simply copy “TFB” folder to Tape, across LAN, to CD, or according to the policies and procedures of your organization**

Applying Virus and Security Updates

- **IMPORTANT Do not use automatic update feature**
- **Apply updates per your policies and procedures**
- **Restart server only after all ports show OnHk in the VOS Window**
- **Simply copy “TFB” folder to Tape, across LAN, to CD, or according to the policies and procedures of your organization**

