

IVR - How to set up a Callback Plan

INFORMATION

There are two ways to setup callbacks.

A. To setup a callback plan in a menu:

The first is to have the callback be an option in a Menu. This is not the traditional way of doing it, however, some customers do use this configuration. Normally, this is offered by companies that know they have longer than average wait times, or that want to offer a more controlled callback situation, where the customer can leave a question in the message and when the agent calls them back, they can have that answer.

1. In **YourSite Explorer** under **Extensions** create a port and assign it as a **Callback port 5020 IP**. This will be what the Outbound service uses when it places the call back. You do not need to assign it to any flow, as it's automatically assigned to the outbound flow. You can create more if you wish. Each port will allow for one callback at a time to be processed.

2. Create a port and assign it as a **Messaging port 5020 IP**. This will then be assigned to the call flow with the callback option. You can assign more than one port or assign the ports to a Hunt Group and assign it instead.

3. In **YourSite Explorer** under **Visual Callflow Manager** and **Call Flows** setup a standard **Voice** call flow with an Answer/Hang-up and any conditions/options you want. Ensure that there is at least one menu.

4. For one of the options in the Menu, add a Callback activity.

5. Right click the callback activity and assign it to the **Default Voice Callback plan**.

6. You then need to assign the **Destination**. This is the Queue or Extension that the callbacks will be sent to.

A Note about Destinations: You can send your callbacks to one of three different destination types:

- An ACD Path dedicated to the queue that the callbacks are coming from (one dedicated path per source queue). This is the preferred method.
- Send the callbacks to the path it originated from. This will cause reporting anomalies, as the initial call and the callback will both peg (one as an interflow, one as a call handled)
- Create a single callback queue to handle all callbacks.

7. Go to the **Callback Plan** section on the left and modify that default plan as needed.

Alternatively, you can create a new one and assign it instead to the previous step. Mostly, the default settings are fine.

When the customer has finished entering their information, the callback request is generated. At that point, when it's conditions are met, the system will offer that callback to an

agent/queue/extension and the callback port you created in step 1 will become involved. It will dial the customer's number, and once the bridge is completed, it will hang up on the conference, leaving the agent and customer talking, and the port will be available to process the next callback.

B. To setup the interflow callback option:

The second way to do a callback plan is via an interflow dialing list in a RAD message and this is the more common one. After the caller has been on hold in the queue for a certain time, a message is played that offers something along the lines of 'press 1 to leave a callback request.' This requires the creation/integration of an Interflow Dialing List on the 3300. For assistance configuring the 3300, please contact your Dealer.

1. In **YourSite Explorer** under **Extensions** create a port and assign it as a **Callback port 5020 IP**. This will be what the Outbound service uses when it places the call back. You do not need to assign it to any flow, as it's automatically assigned to the outbound flow. You can create more if you wish. Each port will allow for one callback at a time to be processed.

2. Create a port and assign it as a **Messaging port 5020 IP**. This will then be assigned to the call flow with the callback option. You can assign more than one port or assign the ports to a Hunt Group and assign it instead.

3. In **YourSite Explorer** under **Visual Workflow Manager** and **Call Flow** setup a standard Voice call flow with an Answer and Hang-up and put in a Callback activity.

4. Right click and assign it to the **Default Voice Callback plan**.

5. You then need to assign the **Destination**. This is the Queue or Extension that the callbacks will be sent to.

A Note about Destinations: You can send your callbacks to one of three different destination types:

- An ACD Path dedicated to the queue that the callbacks are coming from (one dedicated path per source queue). This is the preferred method.
- Send the callbacks to the path it originated from. This will cause reporting anomalies, as the initial call and the callback will both peg (one as an interflow, one as a call handled)
- Create a single callback queue to handle all callbacks.

6. Go to the **Callback Plan** section on the left and modify that default plan as needed.

Alternatively, you can create a new one and assign it instead to the previous step. Mostly, the default settings are fine.

7. Now go and setup a **RAD callflow**, playing the RAD message you want that will provide the option to leave a callback message, and assign a RAD port/HG to it. They can also use the imbedded RADS on the 3300 if they want instead of ours.

Once the plan is setup, you need to configure the Interflow and RAD.

8. The RAD can be setup in our software via the YSE or on the PBX. To do so in the YSE, go the **Queue** section and go to **3300 ICP options**, and scroll down to the **Recording announcement options** section.
10. Set the **Dialable** for the appropriate RAD option to be the **Port** or **Hunt Group** assigned to the RAD call flow you setup in step 7.
11. Set the timers appropriately to play at the right times.
12. Select the correct Interflow dialing list number. The Interflow list entry is simply a DTMF the customer can enter that sends the call to another location.

On the 3300, the dealer then needs to go setup the Interflow Dialing List and use the number specified in option 12. Set the interflow to go to the port or Hunt Group assigned to the callback call flow, created in step 3.

In this setup what will happen is the following:

1. The RAD will play at the appropriate time.
2. The customer will hear an option to 'press 1 to leave a callback.'
3. When they hit 1, it will transfer them to the callback plan call flow.

When the customer has finished entering their information, the callback request is generated. At that point, when it's conditions are met, the system will offer that callback to an agent/queue/extension and the callback port you created in step 1 will become involved. It will dial the customers number, and once the bridge is completed, it will hang up on the conference, leaving the agent and customer talking, and the port will be available to process the next callback.

APPLIES TO

IVR 6.0

Keywords: Callback plan howto how to call back setup set up

Last Modified By: amontpetit, Tuesday, June 25, 2013
<http://micc.mitel.com/kb/KnowledgebaseArticle51669.aspx>

Friday, August 12, 2022