Composer Help

How To: Automate an SMS Response to a Customer Call

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How To: Automate an SMS Response to a Customer Call

This topic presents a very simple example of the Genesys “Omnichannel” capability, coordinating different media channels when a customer reaches out to your contact center. It will illustrate how you might automatically generate and send an SMS to a customer who had just made a voice call to your contact center, perhaps offering the caller a link to a survey or confirmation of the case number.

This example also shows how interactions from distinct media can be linked in a step-by-step workflow created in Composer, the Genesys tool that allows you to model your business. Composer-created workflows are executed by Orchestration Server, the Genesys engine that allows different media (voice, email, chat, SMS, and so on) to be coordinated and thereby enhance the customer experience. While the example here demonstrates a voice call synching with an SMS, you can also use Composer for many other types of Omnichannel routing.

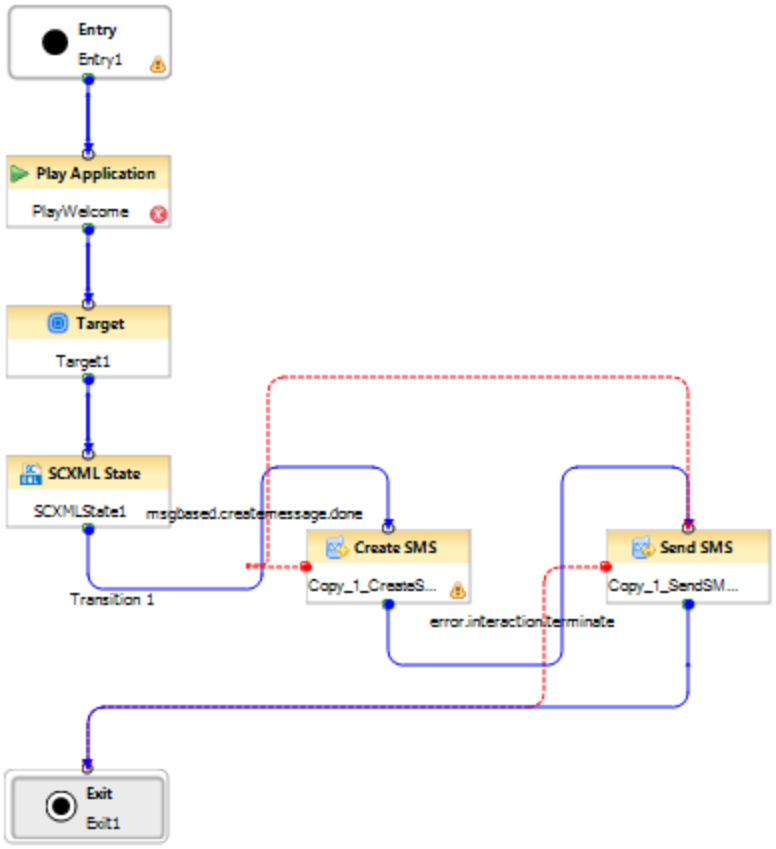
Why Would I Use This?

The Building Blocks

This workflow diagram below was built with the following Composer blocks:

1. Entry and Exit blocks
2. Play Application block
3. Target block
4. SCXML State block
5. Create SMS block
6. Send SMS block

The Workflow Diagram



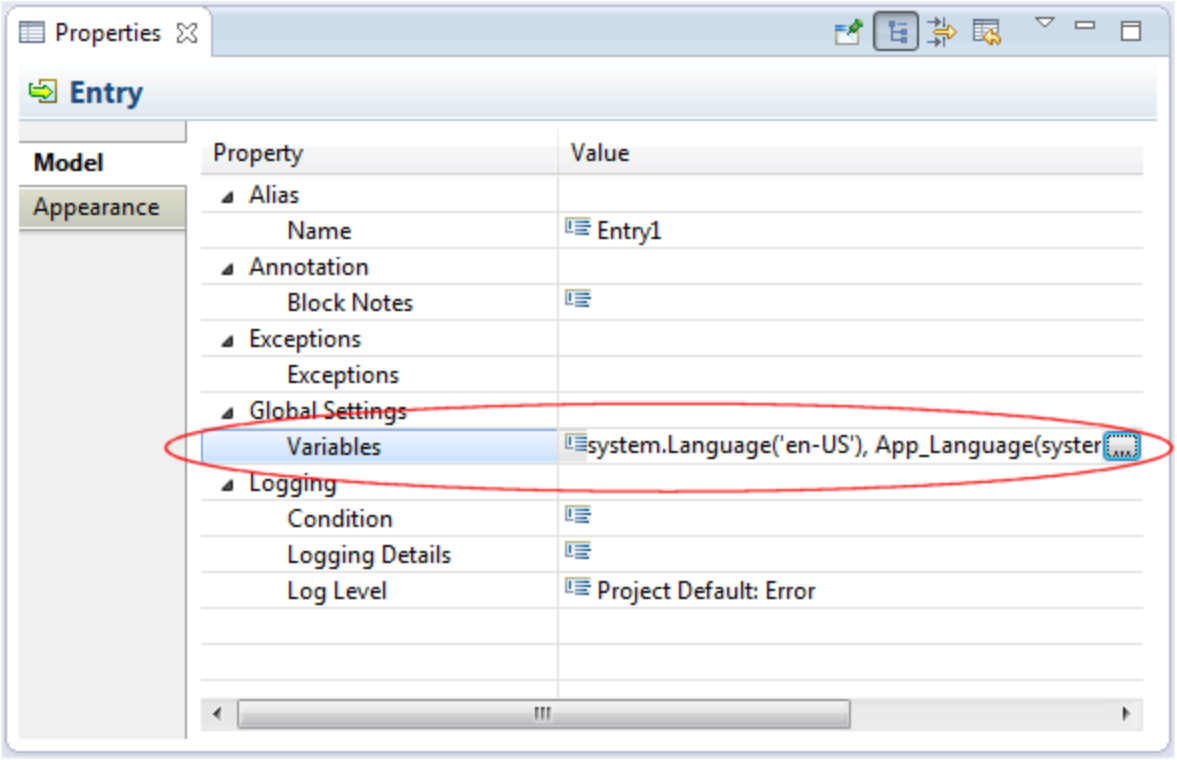
This is the finished workflow diagram that we will explore. The configuration for each block is shown further ahead. To start a diagram in Composer, select **New** > **Java Composer Project**, enter a name, select **Integrated Voice and Route** (in this case), then click **Finish**.

The diagram creation process goes like this: You drag and drop blocks from Composer's palette of blocks, configure the block properties, connect the blocks, **Save**, **Validate**, and **Generate** the code (SCXML).

> ### Important
> After you configure a block's properties, be sure to select **Save** from the **File** menu. Don't wait until you have configured all the blocks to save.

For more detail, see Creating a New Routing Project.

Configuring the Entry Block

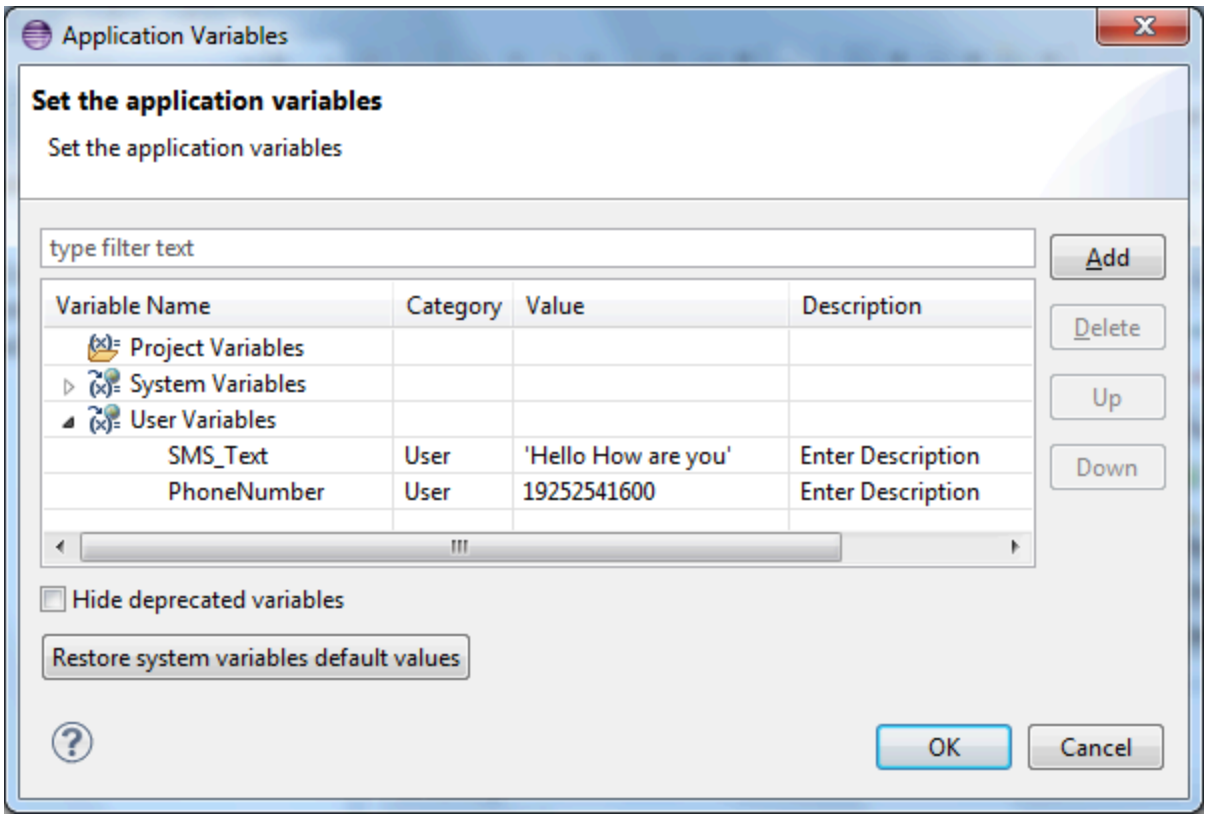


Note the Entry block at the top of the above diagram and the Exit block at the bottom. Every diagram starts with an Entry block and ends with an Exit block.

Workflow diagram-building blocks are contained in Composer's palette of blocks, which appears on the side of the Composer UI.

Each block has configurable *properties* (fields) associated with it. Dragging and dropping a block from the palette into the design area automatically opens a view for that block where you configure properties associated with the block. The Properties view shown opposite is for the Entry block. Selecting a block already placed in the design area also opens the Properties view for that block.

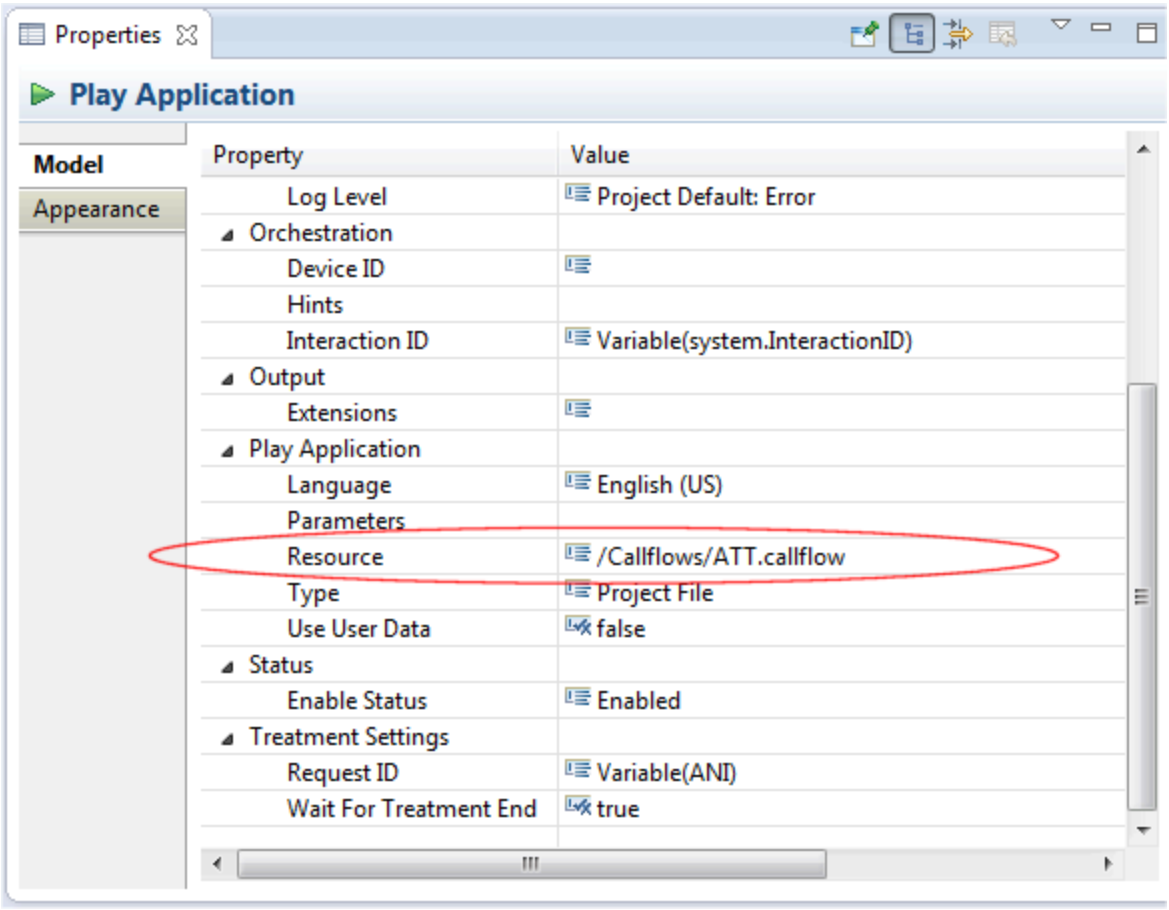
Configuring Entry Block Variables



One function of the Entry block is to define variables. You open the dialog box shown on the left for defining variables by clicking the button opposite **Variables** (see Properties view above). You have the option of assigning values to predefined **System** and **Application** variables. Or you can define your own **User** variables.

The Variables dialog box in this example shows two user-defined variables defined: `SMS_Text` and `PhoneNumber`.

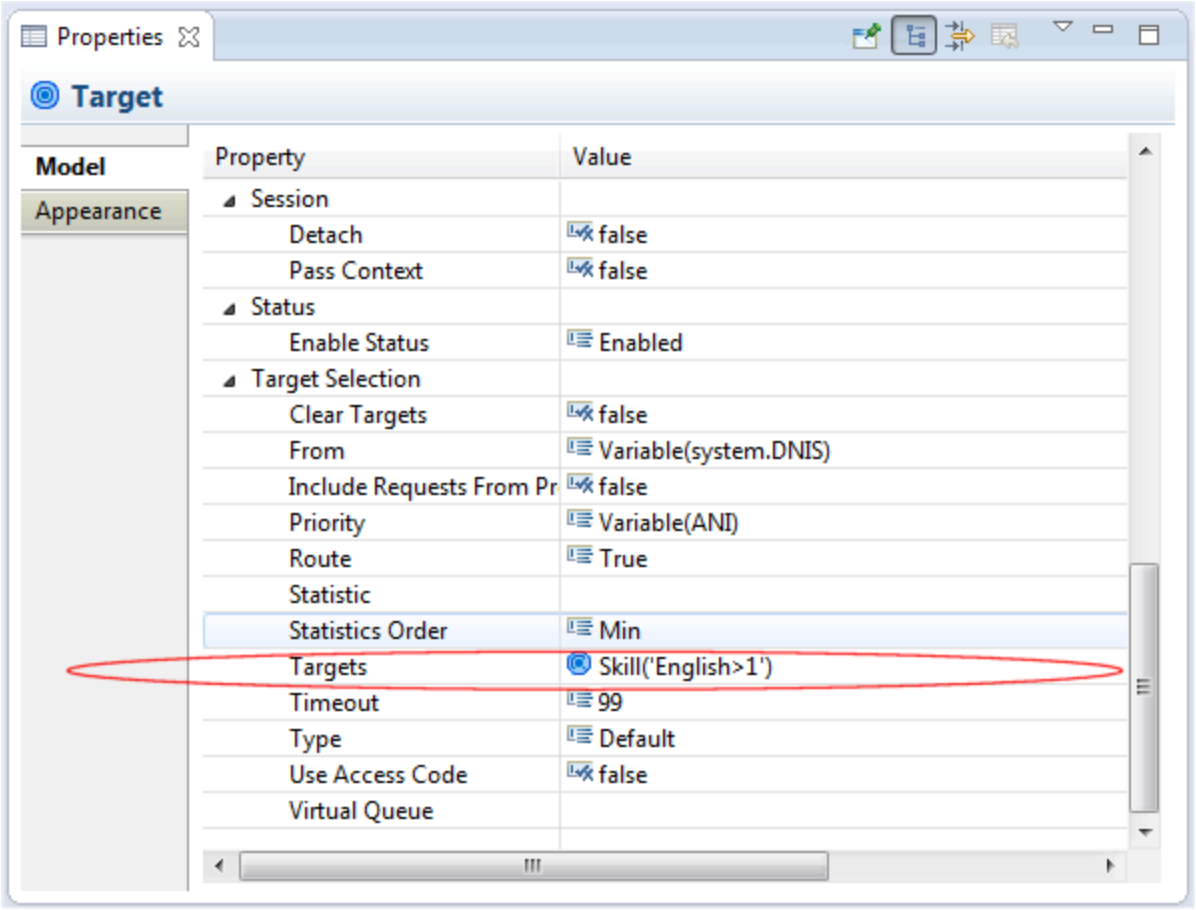
Configuring the Play Application Block



The second block in the diagram is a Play Application block. This block executes an application or a script on a device, such as an Interactive Voice Response unit (IVR).

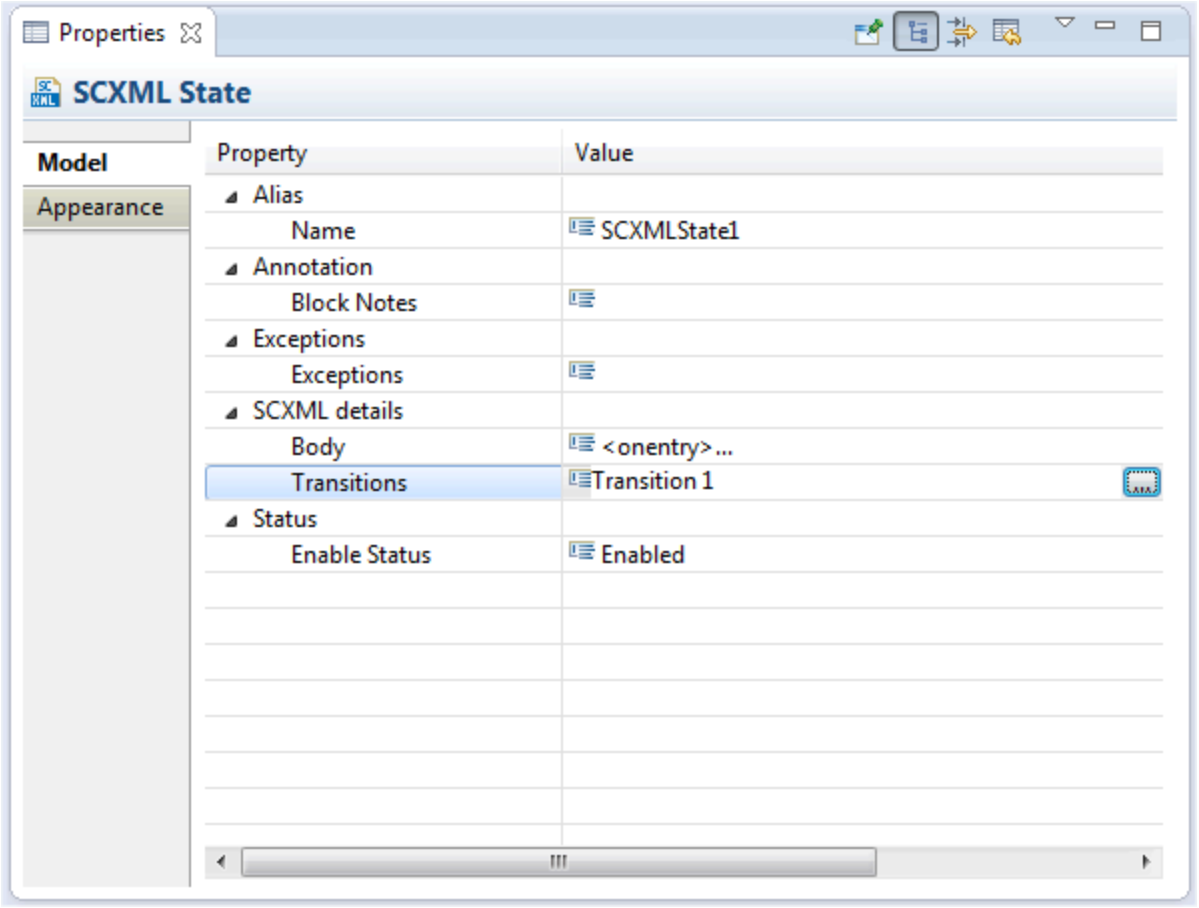
In the example diagram, the Play Application block plays a voice recording to the calling customer. As shown by the `Resource` property, the Play Application block plays the recording associated with the `ATT.callflow`. This callflow would be part of the same Project file containing the workflow diagram being described here.

Configuring the Target Block



The third block in the diagram is a Target block. This block routes a customer interaction to to an agent based on the Target Type criteria you select. The Target block in our example diagram routes based on agent `Skill`. The skill expression shown for the Targets property instructs to route the interaction to an agent having an English `Skill` greater than "1".

Configuring the SCXML State Block



The fourth block in the diagram is a SCXML State block. This block gives the option of including custom code in the SCXML document that Composer generates based on the workflow diagram.

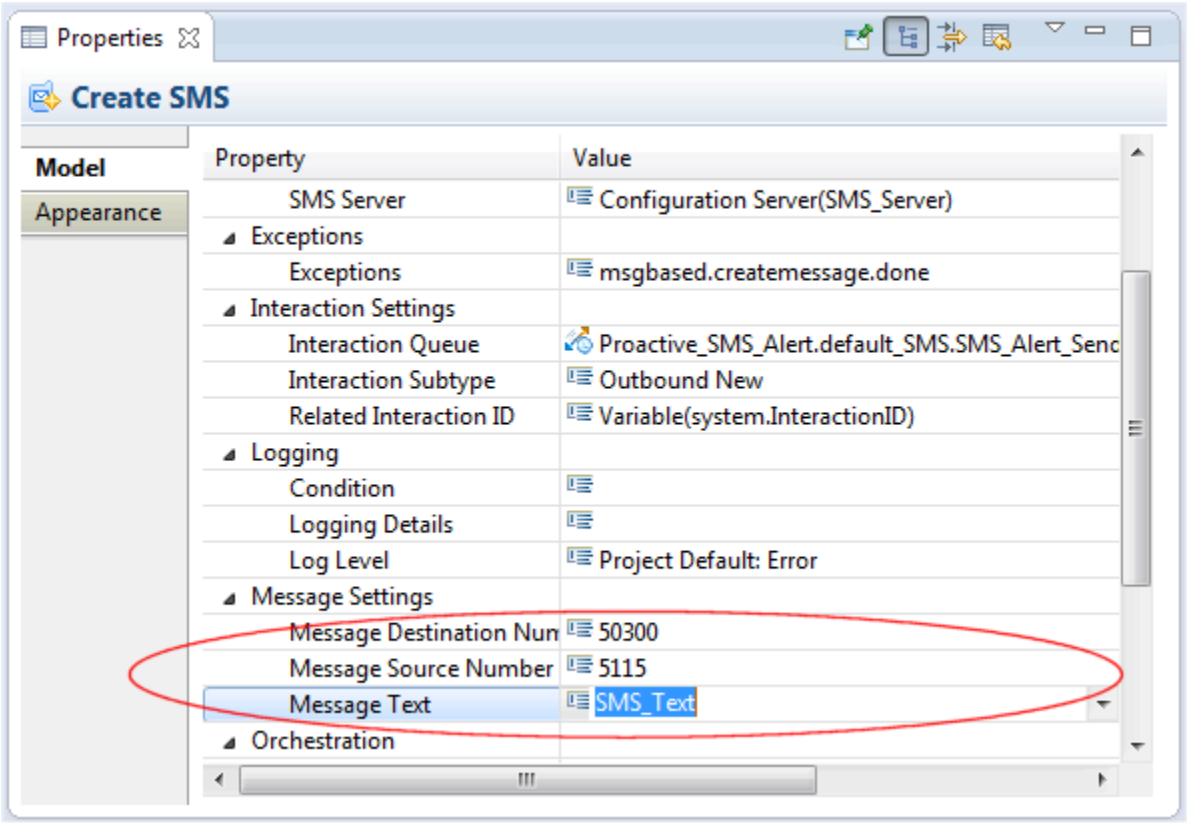
The SCXML State block in our example diagram contains `Transitions 1` (a user-defined name) for the Transitions Property used for transitioning from voice to SMS. Clicking the button opposite the Transitions property shows `Transition 1` defined as `interaction.deleted`.

[+] Background on SCXML

When you create a workflow diagram in Composer, the result is an SCXML-based routing strategy. Orchestration Server (ORS) executes these SCXML-based routing strategies. The ORS SCXML Engine supports a variety of Genesys-developed flow control SCXML elements and methods, which gives the option of creating more complex strategies. The *Orchestration Server Developer's Guide* documents these Genesys-specific elements and methods. If you need more information at this point, the `<transition>` element and `interaction.deleted` used in the example SCXML State block, are defined in section "Interaction Interface Action Elements" in the *Orchestration Server Developer's Guide*.

Note: The SCXMLState block has a Target previously defined for `Transition 1` so it does not need the Body property. Although not shown here, there could be an outport on the SCXML State block connected to another block that could provide logic to be executed when `interaction.deleted` is received.

Configuring the Create SMS Block

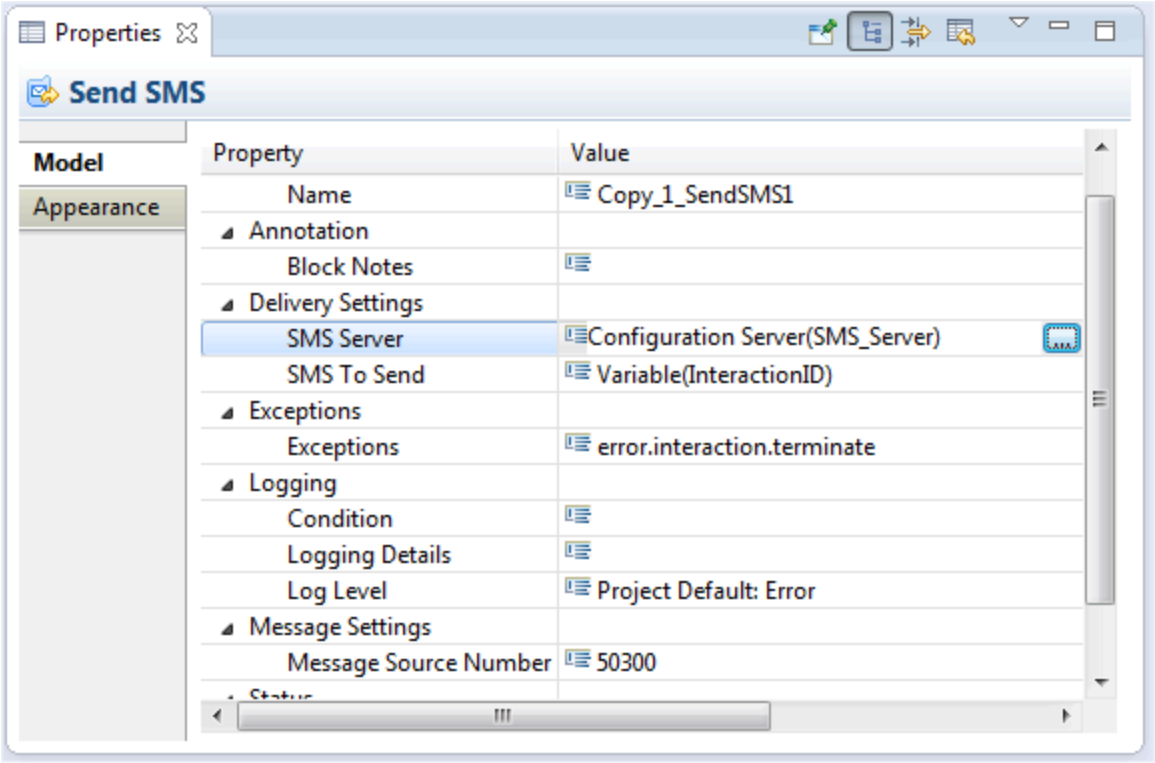


The fifth block in the diagram is a Create SMS block used to create an outbound message, which can be sent out as a Short Message Service (SMS) text to an external SMS Server. *SMS* refers to the common text messaging service available on cellphones and other handheld devices.

Block properties include the Message Text, Outbound Queue for the outbound message, the Message Destination Number, and the Message Source Number.

The Message Text can be manually entered or be contained in variable. The example diagram uses the `SMS_Text` variable previously defined in the Entry block.

Configuring the Send SMS Block



The sixth block in the diagram is a Send SMS block. This block sends the SMS message created with the Create SMS block to the SMS server.

Why Would I Use This?

There are number of reasons why you might want to configure this type of workflow where a calling customer is sent a text message. A few examples are presented below.

[+] IVR Cannot Handle

Your IVR cannot handle a particular type of customer inquiry:

1. A customer calls into the contact center IVR triggering self-service.
2. The customer requests a transaction that is not possible via the IVR and the the customer call is placed into a queue.
3. The customer abandons the queue.
4. An SMS is sent to the customer to start an SMS conversation with the contact center.
5. The customer can then reply via SMS when they are ready.
6. The SMS server can use its session capability to perform a SMS/chat with the customer or call the

customer back when appropriate.

[+] Last Call Agent Unavilable

The agent who last handled this customer's call is unavailable:

1. A customer calls into contact center and the routing strategy identifies this customer as one with a high risk of leaving.
2. The routing strategy is configured to allow the customer to be connected with the last called agent if they call back within the next XX days/hours/weeks.
3. The customer is directed to a "churn" agent who is trained to handle the this type of high risk situation.
4. The customer is sent an SMS with the agent details to personalize the experience and allow the customer to remember the details of the agent they last spoke with. As a result, if the customer calls back and the last agent for valid business reasons is not available to assist, then the customer knows exactly which agent they can request and a message can be left.

[+] Post-Call Survey

You might want to request a post-call survey:

1. A customer calls into contact center.
2. The routing strategy classifies the intention of the caller and identifies that the customer has a mobile phone that can receive an SMS.
3. The routing strategy selects the ideal agent for the customer inquiry.
4. The customer is routed to the ideal agent.
5. The customer is sent an SMS with a link to a post-call survey.

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