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# Genesys Intelligent Automation Reference Guide

Using Multimodal Communication

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# Using Multimodal Communication

## Important

This feature requires **Orchestration Server 8.1.4**.

Multimodal communication allows you to take advantage of various communication channels in a single interaction to enhance the customer experience.

For example, a customer might call your company to enquire about a product you sell. Before getting to an agent, you want to ask the caller for his or her email address so you can send more information about the product. However, it's not practical to have the customer enter an email address in a traditional IVR environment - it is much easier to have the customer type this information using a mobile app on a smartphone. Genesys Intelligent Automation can take advantage of both methods in a single interaction to best serve the customer.

Here's how it works:

- The customer calls your company.
- An Intelligent Automation application answers the call, identifies the caller, and begins routing the caller to the right department.
- When prompted for an email address, the application sends the customer a SMS message to open a mobile app on a smartphone.
- The customer opens the link and provides the information. The call continues in the background, with the Intelligent Automation application guiding the customer throughout the entire interaction.
- Once the information is captured, the customer returns to the phone call without any interruption in service.

## Important

When a call enters multimodal mode, **Message** block prompts appear in the WebIVR application but these prompts are not read aloud by the IVR application. Only **Menu** or **Question** block prompts are read aloud by the IVR application while in multimodal mode.

## Preparing your environment

### Integrating with ORS

Use **Genesys Administrator** to create a Routing Point to point to a new Orchestration script.

1. Log in to Genesys Administrator.
2. Go to **Provisioning > Routing/eServices > Orchestration**.
3. Click **New...**
4. In the **Configuration** tab, configure the following:
  - **Name** - Enter a name for this object. For example, `IntelligentAutomation_Multimodal`.
  - **Script Type** - Select **Enhanced Routing**.
  - **URI** - Enter the URL of the Intelligent Automation VUI server or VUI Load Balancer to use for multimodal communication. For example:

```
http://<host:port>/fish-vui/ors/  
MultiModalContainer.jsp?gap_testsiteid=<#>_istestcall=<boolean>_url=<url_including_protocol_and_port>
```

Where:

- `<host:port>` specifies the URL for the Intelligent Automation VUI server.
  - `gap_testsiteid=` specifies the ID number of the Intelligent Automation application.
  - `gap_istestcall=` specifies whether this is a test call (true or false).
  - `gap_url=` specifies the URL for the Intelligent Automation VUI server.
5. Click **Save**.
  6. In **Switching > Switches > SIP\_Switch > DNS > Routing Point**
    - Click **New...**
    - In the **Configuration** tab,
      - Enter the DID number and select type as **Routing Point**.
      - Under **Routing & Orchestration**, add the orchestration application created during ORS integration.
    - Click **Save**.
  7. In Orchestration, within **DN** tab, add the created DN and save it.


## Configuring Intelligent Automation

The following VUI preferences are available in Intelligent Automation installations after the 3.5.x release. For releases before 3.5.x that were upgraded to more recent versions, you must add these preferences manually or import a new standard application template.

Setting	Description	Valid values
Standard 'Visual Switch' exit read-only DTMF	Specifies the DTMF key that callers can press to exit multimodal operation and resume IVR-only or voice mode. This is particularly useful for iPhone callers, as these users cannot click <b>Close</b> to end the WebIVR application.	Any DTMF key. For example: *.

Setting	Description	Valid values
Standard 'Visual Switch' menu caller phone no. grammar	Specifies the grammar used to capture the caller's phone number for SMS.	Select a specific country, or <b>Digits</b> for general use.
Standard 'Visual Switch' menu caller phone no. variable	Specifies the variable against which to store the caller's phone number. If this variable is pre-populated before the user enters multimodal mode, Intelligent Automation does not invoke the SMS phone number question and grammar.	String
Standard 'Visual Switch' menu mode	Specifies the multimodal mode to use for the current block.	<ul style="list-style-type: none"> <li>• <b>IVR Only</b> - Use normal IVR operation with no multimodal functionality. Note: This value must not be used to switch back from multimodal mode. Instead, select <b>Visual Mandatory Off</b>.</li> <li>• <b>Visual Optional</b> - Allows the caller to choose whether to use IVR or multimodal. See <b>Standard 'Visual Switch' menu option DTMF</b> or <b>Standard 'Visual Switch' menu option synonyms</b> to set values for how the caller can change modes.</li> <li>• <b>Visual Mandatory On</b> - Forces use of multimodal. As a result, Intelligent Automation prompts the caller for a SMS phone number.</li> <li>• <b>Visual Mandatory Off</b> - Forces the interaction back to IVR only. Use this option in conjunction with <b>Visual Mandatory On</b> to specify when multimodal must begin and end.</li> </ul> <div> <p><b>Important</b></p> <ul style="list-style-type: none"> <li>• Intelligent Automation checks this setting for <b>Menu</b> blocks only. You cannot switch modes with any other block.</li> <li>• When Visual mode switches back to IVR, it is</li> </ul> </div>

Setting	Description	Valid values
		<p>not required to set <b>Visual Mandatory Off</b> under Default behavior as the switch happens automatically when the maximum number of retries limit is reached on the Visual IVR menu.</p>
Standard 'Visual Switch' menu option DTMF	If <b>Standard 'Visual Switch' menu mode</b> is set to <b>Visual Optional</b> , this value specifies the DTMF key the caller must press to switch modes.	Any DTMF key
Standard 'Visual Switch' menu option synonyms	If <b>Standard 'Visual Switch' menu mode</b> is set to <b>Visual Optional</b> , this value specifies the ASR grammar used to switch modes when spoken by the caller.	Comma-separated list
Standard 'Visual Switch' menu option weight	If <b>Standard 'Visual Switch' menu mode</b> is set to <b>Visual Optional</b> , this value specifies the ASR weighting applied to the <b>Standard 'Visual Switch' menu option synonyms</b> spoken by the caller. This can be set accordingly to reduce the likelihood of accidental recognition of a mode switch.	From <b>-100</b> to <b>+100</b>
Standard 'Visual Switch' menu sms cancel dtmf	<p>After Intelligent Automation sends an SMS to the user, the IVR plays in a loop while it waits for the caller to click the WebIVR link. The IVR only moves forward after the caller opens the WebIVR link.</p> <p><b>Important</b></p> <p>The <b>Prompt Ref: Standard visual switch sms wait prompt</b> can be modified to the specific dtmf in the application's <b>Prompt List</b>. An asterisk is present as the prompt by default.</p>	Any DTMF key

Setting	Description	Valid values
	 <p>This value specifies the DTMF key that the caller can press to cancel the loop and resume IVR-only mode. The <i>cancel switch</i> event is triggered when the caller presses the DTMF key.</p> <p>This is useful if the caller does not receive the SMS message.</p>	
Standard 'Visual Switch' menu sms cancel synonyms	After Intelligent Automation sends an SMS to the user, the IVR plays in a loop while it waits for the caller to click the WebIVR link. The IVR only moves forward after the caller opens the WebIVR link. Therefore, this value specifies the ASR grammar item the caller can use to cancel the loop and resume IVR-only mode. This is useful if the caller does not receive the SMS message.	Comma-separated list
Standard 'Visual Switch' menu sms cancel weight	The ASR weighting applied to <b>Standard 'Visual Switch' menu sms cancel synonyms</b> . This is useful to reduce the likelihood of accidental recognition of a mode cancellation.	From <b>-100</b> to <b>+100</b>
Standard 'Visual Switch' menu sms wait prompt iterations	After Intelligent Automation sends an SMS to the user, the IVR plays in a loop while it waits for the caller to click the WebIVR link. The IVR only moves forward after the caller opens the WebIVR link. This value specifies the number of times the loop plays before resuming IVR-only mode. You can use this option in conjunction with <b>Standard 'Visual Switch' read-only timeout</b> to play the prompt only once and wait in silence until the link is clicked.	Integer
Standard 'Visual Switch' read-only max retries	After Intelligent Automation sends an SMS to the user, this	Integer

Setting	Description	Valid values
	value specifies the maximum number of times to reject invalid input before resuming IVR-only mode.	
Standard 'Visual Switch' read-only max timeouts	After Intelligent Automation sends an SMS to the user, this value specifies the maximum number of times to time out before resuming IVR-only operation.	Integer
Standard 'Visual Switch' read-only prompt mode	Specifies whether to use the voice persona or the visual persona for prompts.	<b>Voice</b> or <b>Visual</b>
Standard 'Visual Switch' read-only timeout	After Intelligent Automation sends an SMS to the user, this value specifies the length of time, in milliseconds, to wait before timing out.	Integer

## Frequently asked questions

How do I force the user to switch to multimodal mode at a certain point in the callflow?

To force a switch to WebIVR mode:

- Select a **Menu** block to force a switch to WebIVR.
- Open the **Menu** block.
- Add a VUI preference named **Standard 'Visual Switch' menu mode** and set it to **Visual Mandatory On**.

To force a switch back to the phone call:

- Select a **Menu** block to force a switch to WebIVR.
- Open the **Menu** block.
- Add a VUI preference named **Standard 'Visual Switch' menu mode** and set it to **Visual Mandatory Off**.

Can I let the caller choose when and where to use WebIVR?

Yes. Add the following default VUI preferences:

- **Standard 'Visual Switch' menu mode** - Set to **Visual Optional**.



- **Standard 'Visual Switch' menu option DTMF** - Specify a DTMF key the caller must press to initiate the switch to WebIVR.
- **Standard 'Visual Switch' menu option synonyms** - Specify recognition phrases the caller must say to initiate the switch to WebIVR.

Do I have to send the SMS to the phone I'm calling from?

No. The number can be changed by the following steps:

- Add the VUI preference **Standard 'Visual Switch' menu caller phone no. variable** to a variable name.
- Use an additional **Question** block to confirm the destination number for SMS to send this IVR URL and update the variable to the required destination number.
- Add the VUI preference **Standard 'Visual Switch' menu caller phone no. grammar** if the destination number needs further amendments.
- Add the VUI preference **'Standard 'Visual Switch' menu** mode. This will now send SMS to the required destination.

### Important

The phone number must be confirmed in a separate menu block before the block that invokes the multi-modal menu block.

The IVR reads back the text from the WebIVR while in multimodal mode. Can I change this?

Yes. The VUI preference **Standard 'Visual Switch' read-only prompt mode** indicates which persona set is used by the IVR when in multimodal mode.

The default value, **Visual**, allows a single callflow to support an optional visual switch. If a caller is on the phone, he or she hears prompts that are relevant to a phone call. If the caller switches to WebIVR, the Visual persona prompts are read back by the IVR.

However, should a particular callflow only need to support multimodal mode (in other words, you are forcing the caller to switch to WebIVR), the value can be set to **Voice**.

I didn't receive a text. Must I wait for the IVR to time out before getting out of the loop?

No. If you didn't receive the text, you can use the values of VUI preferences **Standard 'Visual Switch' menu sms cancel dtmf** and **Standard 'Visual Switch' menu sms cancel synonyms** to cancel the wait and move back to normal IVR mode.

If the IVR is in read-only mode and I lose connectivity, how can I return to IVR-only mode?

You can configure the VUI preference **'Standard 'Visual Switch' exit read-only DTMF** to specify a DTMF key that cancels multimodal mode. Any other DTMF key triggers a retry and, assuming the

prompt is configured appropriately, reminds the caller of the only applicable DTMF key at that time.

I don't want the IVR to repeat the prompts in read-only mode. How can I achieve this?

Set the VUI preference **Standard 'Visual Switch' read-only timeout** to a large value to offer a larger *silence* time between prompts.

When using multimodal mode and the IVR is in read-only mode, why are only Menu and Question prompts spoken to the caller?

This is a limitation that will be addressed in a later release.

Where are the prompts that relate to multimodal functionality?

They are in the standard prompts of the inbound application, named:

- Standard visual goodbye
- Standard visual switch back to ivr
- Standard visual switch callback help prompt 1
- Standard visual switch callback help prompt 2
- Standard visual switch callback initial prompt 1
- Standard visual switch callback initial prompt 2
- Standard visual switch callback retry prompt 1
- Standard visual switch callback retry prompt 2
- Standard visual switch callback timeout prompt 1
- Standard visual switch callback timeout prompt 2
- Standard visual switch enter phoneno help prompt
- Standard visual switch enter phoneno initial prompt
- Standard visual switch enter phoneno retry prompt
- Standard visual switch enter phoneno timeout prompt
- Standard visual switch sms cancel confirmation prompt
- Standard visual switch sms sent prompt
- Standard visual switch sms system cancelled prompt
- Standard visual switch sms user cancelled prompt
- Standard visual switch sms wait prompt
- Standard visual switch transfer confirm help prompt
- Standard visual switch transfer confirm initial prompt
- Standard visual switch transfer confirm retry prompt
- Standard visual switch transfer confirm timeout prompt

How can I configure the WebIVR title bar?

Specify a new value for **Standard visual title bar message prompt**.

How can I configure the WebIVR **End** and **Back to Voice** buttons?

Specify new values for **Standard visual back to voice button prompt** and **Standard visual end button prompt**.

Can I transfer to an agent from a multimodal call?

Currently, Genesys Intelligent Automation only supports bridged transfers, which means the Genesys Intelligent Automation session is kept open for the duration of the transfer. However, your Genesys representative can implement custom transfer logic in order to support other kinds of transfers.