

IVR and ACD - Simple Whitelist / VIP Routing

Introduction

This example shows you how to create a whitelist which allows some callers to be routed to an ACD group always, but other callers can be handled differently depending on other criteria such as opening times.

It makes use of the Start 2 entry point to the ACD group to bypass rules attached to the Start entry point for normal callers.

Never used that trick before? Then read on ...

Whitelist

First of all create a list using **System Settings ... Lists**.

The first column in the list will be the caller ID, the second column is the name of the entry - for informational purposes only.

 Edit List "Tutorial Whitelist" [Export CSV](#)

List

Entries

Filter : X [New](#) [Import](#) 2 Records in Total. Showing 2 Records from 1 to 2. Page 1 of 1.

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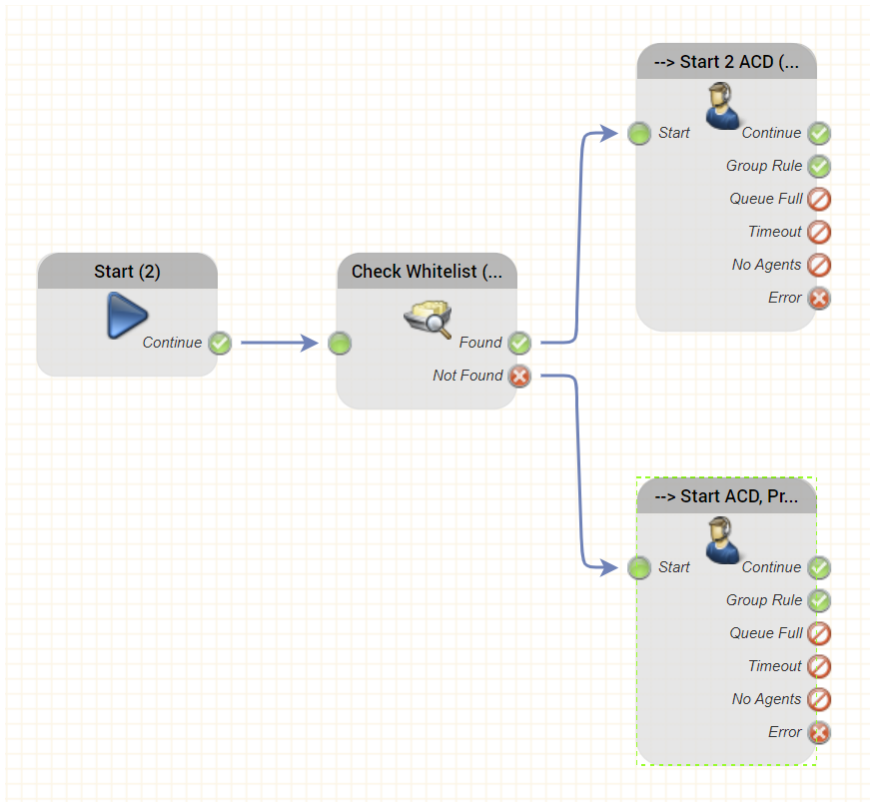
Field 1	Field 2	Field 3	Field 4	Action
49199123456789	The Boss			Edit Delete
49199987654321	Our best customer			Edit Delete

Routing

The goal is to:

- Route normal callers according to opening times or other criteria.
- Route VIPs to the ACD group always.
- Rules in the ACD group will determine opening times etc. This is fairly standard practice if you want all of the statistics to go to the ACD statistics too, even for calls out of hours. (This aspect of the implementation is not discussed in this example).
- VIPs and special callers will bypass these rules.

The routing is configured as follows:



Each of the objects is parameterised as follows:

Check Whitelist

List Lookup

Object Name :

Check Whitelist (81)

List :

Tutorial Whitelist

Key Column :

1

Key Value :

\$caller

Value Column 1 :

1

Save to Variable 1 :

Value Column 2 :

1

Save to Variable 2 :

Value Column 3 :

1

Save to Variable 3 :

Close

This will check the whitelist by searching for the caller (\$caller) in the first column of the list.

We don't need to save any variables here - it's enough to know whether the entry was found in the whitelist or not.

Start 2 ACD

This is the VIP entry to the ACD. This we parameterise with a higher priority, and enter at **Start 2**. This is important as we will see further below.

ACD

Object Name :

ACD (109)

ACD Group :

Zentrale (000)

▼

Last Agent :

Call Priority :

100

▼

Entry point :

Start 2

▼

Extra Info :

Language :

German (Germany)

▼

Start ACD

This entry to the ACD is given a call priority 50 (lower), and entry point Start:

ACD

Object Name :

ACD (109)

ACD Group :

Zentrale (000)

▼

Last Agent :

Call Priority :

50

▼

Entry point :

Start

▼

Extra Info :

ACD Configuration

This is the important bit!



In order that VIPs found in the whitelist will bypass the rules attached to the start of the group, all rules regarding:

- Opening times
- Holidays
- Special opening times cases, for example company general meetings

are attached to the **Start** check point in the ACD group.

Since VIPs and special callers in the whitelist will be routed to **Start 2** by the IVR application, they will bypass these rules and always end up in the group.

Conclusion and Uses

- The **Start**, **Start 2** and **Start 3** entry points to an ACD group give you the capability and flexibility to apply different rule-sets and priorities to callers entering an acd group.
- You can use this capability to bypass rules attached to, for example Start, like in this example, for VIP routing.
- Or you could attach completely different rule-sets to each Start checkpoint, for example based on which service level a customer / caller has:
 - Start = 8x5 Monday to Friday
 - Start 2 = 12 x 5 Monday to Friday
 - Start 3 = 24 x 7
- You can increase (or decrease) caller priority.
- Calls will be recorded in the statistics of the ACD group.