

### National Distributor Uses ODT VISION VRU With JBA System to Improve Customer Service

#### Animal Healthcare requires Unique customer service

Last year we did a project for a national distributor of health-care supplies to veterinarians. The goal of this firm is to make obtaining supplies simple and efficient for their unique customers. This client is on an iSeries/AS400 using JBA software. They have regional distribution/marketing centers and want to provide the best possible customer service to a cliental which may be mobile and may be working around the clock.

#### Customer Service Requires 24/7 Response

This client is always looking for ways to improve Customer Service. Four years ago, they began the process of taking their Customer Service to a 24/7 basis with the introduction of their Web based applications. Since their clients work 7 days a week and may need support at various times during the day or night, the number one goal is,

"To be the easiest firm in the world to work with, whether this is through the web, live customer service representatives or the ODT VISION VRU." By the caller using the ODT VISION solution, these veterinarians can be in constant contact to their account information. If mobile, a cellular phone becomes their I.O of choice.

#### What is the ODT VISION Voice Response Unit?

ODT VISION® for the i5/ iSERIES/AS400 is a revolutionary product that allows two-way telephony to your IBM ISERIES/ AS400 and Micro Database. With the ODT VISION®, every touch-tone phone in the world becomes a remote secure terminal to your data. Through the ODT VISION VRU, the client has another way to communicate with their supplier. This is especially important outside of administrative office hours M-F 8:00 AM. to 5:00 PM.

In phase 1, the primary goal is to match the services which are now available during normal office hours on both the web and the live customer service representatives. In addition, this firm wanted to optimize existing customer support personnel.

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#### Benefits of ODT VISION VRU

- Can interact with JBA Client's Customer Service to do a variety of functions
- Available on 24/7 bases
- No training of user
- Any touchtone phone is a terminal to interact with your account
- Internet access is not required
- Security of your account is maintained with sign-on procedure
- Allows JBA Client to improve customer service while optimizing existing personnel to lower administrative cost and therefore offering their products and services at efficient pricing
- If the caller is not an existing customer, their information is collected and forwarded to the proper marketing department so a sales representative can call on them. In addition a credit application is automatically faxed.

## Phase 1 of Voice Solution

The ODT VISION VRU has been customized around the JBA Intl. IBM i5/iSeries/AS400 host's ERP application. In this first phase, the users will be able to:

- Sign-on to their account once security protocols are met
- Verify which account is selected
- Inquire on account balances and account details
- Request the fax of an invoice or a Statement on demand
- Request the change of profile form to be faxed on demand
- Make payments on their account
- Transfer to live customer service representatives during office hours or leave voice-mail outside office hours

All transactions which occur during the call will be logged for audit trail purposes. In addition, the JBA history note function is also maintained.

### Sign-on Procedure

At the beginning of the call, the caller will be asked to say their name and phone number as a security procedure and for use if a call-back is needed. This voice file is saved and entered into the log. The user will then be requested to enter an account number. The VRU at this point looks to see if there are multiple locations under this number. If there are multiple clinics, the unit will request you to identify which location is desired for the session. The caller will need the account number and zip code for account. At this point, the user will hear their account name and address which they must verify. If

the account is suspended, stopped or has an unacceptable overdue balance, the caller will be transferred to a live customer service representative during office hours so CS can better assist them.

### Account Inquiry

From the general menu, the caller can choose an option to hear the current balance and discounted balance. The user can also request a complete breakdown from the various outstanding balance periods if such outstanding balances exist.



### Print Invoice

The user may request to receive an invoice copy by fax once they supply the invoice number. For security purposes, the ODT VISION verifies that this invoice number is tied to this account and the caller must supply the fax number if not listed in their profile. The caller may also redirect the invoice to a different fax number.

### Print Statement

They may also request a fax copy of their account statement. The most recent statement is suggested first, as this is most likely the statement desired, but the caller can request previous statements by month and year. Once again, the profile's fax number is suggested but the user can override this number.

### Change Account Number

The caller may be running multiple accounts with various account numbers, so, from the general menu, they may choose an option to change the account number they are working with during this session.

### Make a Payment

Choosing an option at the main menu, the customer may make a payment on their account with a credit card. The caller can pay the current balance or enter an amount manually. If the latter is chosen, it is applied to the oldest balance. The caller may use a credit card on file, and if they do, the payment transaction is processed immediately and confirmation is given along with a confirmation number once approved by the bank connection. If the caller chooses to use a credit card that is not on file, or if the bank link is down, the transaction is batched and handled later. Customers may call into the VRU system anytime to verify their account balance.

### Transfer to a Live Customer Service Representative

At any prompt, the customer may choose to be transferred to a live customer service representative who can assist the caller with their customer service needs. If after office hours, the unit instructs the caller to leave a voice mail so that a customer service representative can call back during the next business day.

### Future Applications

These are only the first of many applications which can be provided from the ODT VISION VRU. ■

## Potpourri of Specialized Applications

This month's "Application In the Spotlight" article is the seventh of an ongoing series called, "Potpourri of Specialized Applications." Frequently, a client will install the ODT VISION Voice Response Unit for a specific large application, but its ease-of-use and simple customization will later allow for new functions to be added to provide even greater customer service flexibility. Some of these applications have already been done at our clients' sites and some are in the planning stage.



time information. In the past, someone else could punch another employee's card. Cards could be lost or wrong data could be entered in the translation. In addition, remote site work areas were a problem. By using CallerID, the ODT VISION can easily determine if this worker is in their correct work location.

A variation of this is off-site payroll entry. This is a very effective application for a remote crew foreman to post the week's payroll remotely.

We have also seen this same type of call-in routine where security guards use the existing phone system extension to report during their security rounds.

### Mayor's Court, Making Payment Easy

You were late for that very important appointment and as luck would have it, you got a speeding ticket. You want to know how much the ticket will cost and when the case will appear on the Mayor's court docket. You don't have time for this and just want to make it go away. If you could just forfeit the bond, the whole

thing would go away.

The local municipal court would love for you to forfeit the bond and cancel the arraignment. This will settle the case faster, not waste the citizen's time, and the court will collect money faster with less cost.

Not only can the ODT VISION VRU be used for case information but it can also be used for collection of payment if the type of case allows a forfeit of the bond to cancel the arraignment. When the user calls in, the unit determines if the ticket tracking number has been entered into the system and an arraignment has been assigned. The VRU must determine if the case date has passed and if a bond forfeiture is allowed. (Some cases, e.g. DUI, can not go away by paying a bond and arraignment attendance is mandatory.)

Finally, the citizens may need the system to speak languages other than English. This is a complication for many court departments if they don't have personnel in the court system which can address these plaintiffs who don't speak English. We had a city which added "Spanish" to their system to save on the cost of translators ■

### Employee's Time Clock

Years ago, an employees' time clock was found mounted on the walls of many departments where an employee took their personal time card and punched in and out. This same type of function can still be preformed where the user will call a centralized number and then enter their employee identification code. Instead of that information being stored on a punch card, which needs to be transported and then entered into the payroll system, the ODT VISION is entering the data using real

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## Get Your Own Demo Today

Go to [www.ODT\\_VISION.com](http://www.ODT_VISION.com) to get your own demonstration of the ODT VISION

Voice

Response Unit which will run on any Windows based PC of Windows 98 or later with sound card and speakers. This is a simplistic order entry and shipment status system which is running off a Microsoft Access database. The demo is in the test mode and you will be using the "Test Phone" feature of the ODT VISION VRU to simulate a phone call to the data. Manuals and case studies are also available on the web site.

### Improving Customer Service Affordability

Submit your technical questions or get free project analysis regarding your telephony application to:

[TechSupport@ODTVISION.com](mailto:TechSupport@ODTVISION.com)

Or Call: 614-985-3814

**HOW DO THEY DO THAT?**  
Syntax for gathering new customer information and sending it to the proper marketing department

Are you a new customer?

Our Marketing Department wants to know.

This routine checks if office is open. If it is, the call is transferred to a live representative. Fax of credit application uses JBA fax interface

-----  
; New Customer - Get necessary info and fax a Credit form  
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```
NewCustomer:
CustType = "New"
GoSub OfficeStatus
If OfficeStatus = "Open" then
    ClearDigits
    Rtn = Play "ReqTrans.vox",0,"@" ; The office is open. Press 1 if you want
to transfer to live agent or 2 to record info
    Rtn = GetDigits 1,"#",5 ; get digits until # key
    TransferInput = DigitBuffer ; or a max of 5 seconds
    If TransferInput = 1 then
        MsgBox "New Customer - Transferred"
        CallFunctionType = "New Customer - Transferred"
        Goto CallTransfer
    Endif
Endif
Rtn = Play "NewCustInfo.vox" ; "Tell customer what we will be asking for...
GetPhoneNbr:
ClearDigits
Rtn = Play "Phone.vox",0,"@" ; "Please Enter Your 10 Digit Phone Number...
Rtn = GetDigits 10,"#",25
PhoneInput = DigitBuffer
lpi = length PhoneInput
If lpi <> 10 then
    Goto GetPhoneNbr
Endif
ClearDigits
Rtn = Play "SayYourName.vox",0,"@" ; "At the beep, please say your name...
Beep
NameFile = StoredMsgFilesLoc & ControlNo
```

```
NameFile2 = NameFile & ".wav"
NameFile = NameFile & ".vox"
Rtn = Record NameFile,0,"@",30,5,true
VoxWav NameFile
ClearDigits
Rtn = Play "RequestAddress.vox",0,"@" ; "At the beep, please say your Company
Address followed by # key
Beep
AddressFile = StoredMsgFilesLoc & PhoneInput
AddressFile2 = AddressFile & ".wav"
AddressFile = AddressFile & ".vox"
Rtn = Record AddressFile,0,"@",30,5,true
VoxWav AddressFile
Play "YouAre.vox" ; Stack the "You are..." message in the buffer
Play NameFile ; Stack the Name in the buffer
Play "WithAddress.vox" ; Stack the "with address of..." message in the buffer
Play AddressFile ; Stack the Address in the buffer
Play "WithCallBack.vox" ; Stack the "with the callback number of..." message in the
buffer
Rtn = Speak PhoneInput ; Now play everything in the buffer along with the Phone
Number
ClearDigits
Rtn = Play "Ok.vox",0,"@" ; "Press 1 if okay...
OkSelect = GetDigits 1,"#",5
If OkSelect <> 1 then
    Goto GetPhoneNbr
Endif
GoSub GetFax
Rtn = Play "FaxCreditApp.vox" ; You will be receiving a credit application via fax, our
office hours are...
SessionSetcursor 21,11
SessionSendKeys "1/VOX"
SessionSendKeys "[FieldExit]"
SessionSendKeys "[Enter]"
SessionWait
SessionSetcursor 6,30 ; set cursor for the fax number to be used
SessionSendKeys FaxNbr
Sessionsetcursor 8,30 ; set cursor for the Change Address form
SessionSendKeys "CRAPP"
SessionSendKeys "[Enter]"
SessionWait
Email EmailToNewCust
Emailcc EmailCcNewCust
EmailSubject "New Customer to Register in System"
Emailtext ""
Emailtext "Here is a new customer that called in to the Automated Customer Service
Voice Response System."
Emailtext ""
Emailtext "The system faxed a Credit Application to them."
Emailtext ""
Emailtext "Phone Number:"
Emailtext PhoneInput
Emailtext "Fax Number:"
Emailtext FaxNbr
Emailtext ""
EmailAttach NameFile2
EmailAttach AddressFile2
EmailSend
CallFunctionType = "New Customer - Credit App Faxed"
Gosub Log
Rtn = Play "ThankU.vox",0,"@" ; "Thank you for calling .....
OnHook ■
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