

Ohio Data Transfer

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THINKING OUTSIDE THE BOX IN CUSTOMER SERVICE

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VISION Voice Response unit comes from our clients" always said, "The strength of the ODT Response

Our customers tell us what new features would assist them in the design and implementation of their future self-service solutions. By putting a client's suggestion on the "Christmas Wish List", it doesn't mean that the next release will automatically do that function. If it is a true enhancement which would benefit many clients, we often add this suggestion in a future release. As I look at our various screens and features, I many times recall the client that suggested that feature or the logic the user required for a particular project. This team effort between our development team and clients is responsible for making the ODT VISION VRU one of the most functional and client friendly Voice Response Units in the market today.

Our

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Users Define their Own Projects

It is always interesting to see how users are going to use our product. The ODT VISION VRU includes one on-site day where we:

- Install the unit
- Train the client on System Administration & Customization
- Work on base script for phase 1

The client can then take the knowledge from that training day to enhance and modify this base script to meet the current and any future application requirements. It

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is always interesting to contact the client in future months to see what they are doing with our unit and what plans they have for their future CS self-service applications.

Users Teach Us New Things

We recently did a hardware & software upgrade to an existing ODT VISION account in Greenville, SC. *For over 80 years Hewitt Coleman has provided claims administration and other services for self-insured workers' compensation and employee benefits programs.* Since we don't require clients to automatically purchase our latest and greatest, HC was not just a release behind, but actually two generations. The existing system was doing claim payment status and policy status for both clients



Lincoln Cascio of Hewitt Coleman found the solution for faxing directly from the ODT VI-

and providers. One of the reasons for the need of the current generation of the ODT VISION VRU was to send a hard copy fax of the policy status including a schedule benefit document (brief word document which generally defines what is covered in this policy). In this application, we are basically capturing the values of three IBM host screen fields, going to a database and using

those variables to locate the proper "schedule benefit" document. A fax is created from this operation which includes not only the policy information but also the attached schedule benefits. The caller must identify a correct policy and give their ten digit fax number to receive this hardcopy output. Basically, the ODT VISION software creates the fax request and dumps it to the outbound folder of the licensed copy of Outlook that comes with re-

lease 6. We configure the Outlook software for a client to dump the print/fax job to your LAN fax server. **This caused a problem because Hewitt Coleman did not have a fax LAN server.** Lincoln Cascio set up a simple inexpensive PC faxing modem off the communications port of the ODT VISION and used the system's own Windows 2000 operational system to create a fax server for this application. He used information obtained from the web site of:

<http://www.slipstick.com/addins/services/win2000fax.htm#setup>

to find how to send the fax with this modem and Outlook. He also obtained information at that site to bypass the automatic name change banner from Outlook. We had always done this type of process with the Outlook dumping to an actual Fax Server. I wrote a simple test script to verify that it would work and executed it as soon as I arrived on site. It worked like a charm. Points regarding this process will be covered later in this newsletter.

Conditional Test for Attachments

Before you send a fax with attachments, your script will need to identify the documents and prove that the documents do exist in the folder that contains the documents. In the HC application, there was more than one schedule benefits document being used within a company. The caller must identify whether they are calling for a medical or dental inquiry and since the user has identified the individual within that company, we know the screen value variables to find the proper document within the database. High level executives may have different coverage than the average worker. This schedule benefit document becomes the attachment. If the variable string

match can not be located within the database or if the schedule benefit document is not physically within the folder, the call is transferred to a live customer service representative. When either improper event takes place, an email is sent to the customer service director so they can either create the document and place it in the folder or modify the database to show a document which would match this combination of string variables.

What does the fax to field look like?

Basically we are just taking the supplied fax number and performing a concatenation so it appears like this:

Example: [fax:5555555]

Any prefix or suffix required by your phone system (including rules for long distance) must be supplied.

With No True Fax Server, What is Long Distance?

Never ask the caller something they don't know. The caller doesn't know if the ten digit fax number the unit requested is long distance so the logic within the script must determine whether this is so. **The ODT VISION unit is behaving as the fax server in this case.** First, look at the area code within the ten digit fax number. If the supplied number is outside the home area code we can assume it is long distance and you will need to add the proper prefix and suffix. Within the home area code, there may be exchanges which are considered long distance. This was the case at Hewitt Coleman, so we had to set up rules

which check for exchanges within a database and if found, treat the supplied ten-digit number as a long distance fax. (Please see page 4, "How do they do that" section for information regarding this process.)

Does that attachment file exist?

Don't send a print job for faxing or emailing to Outlook without checking to see if the document physically exists. Built within the ODT VISION scripting syntax is an "exist" command to check for the file. In HC's script this looks like this:

```

=====
; * section to see if file exist
=====
If Exists z then
    msgbox "This File Exist"
    msgbox "Name of voice doc"
    msgbox z
    emailattach z
Else
    Returncode = Play "badInformation.vox" ; this policy doesn't have schedule
benefits assigned, call xxx-xxx-xxxx
; ***** test if policy doesn't have document on hard drive*****
; ***** need to see if it back out of screen properly
;*****
    email "CS@hewittcoleman.com"
    emailsubject "No Schedule Benefits for this policy on hard drive"
    emailtext "GroupNo"
    emailtext GroupNo
    emailtext "DivNo"
    emailtext DivNo
    emailtext "CImDiv"
    emailtext clmdiv
    emailsend

    sessionsendkeys "@3"
    Sessionwait
    SessionsendKeys "@8"

```

Within your own area code there may be exchanges which are considered long distance. This was the case at Hewitt Coleman, so we had to set up rules which check for exchanges within a database and if found, treat the supplied ten-digit number as a long distance fax.

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Get Your Own Demo Today

Go to www.ODTVISION.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
Or Call: 614-985-3814

HOW DO THEY DO THAT? Checking if a call is long distance

Play "yeFAXno.vox"; You entered Fax number
rtn = Speak FAXnol ;22323

cleardigits
ReturnCode = Play "fnOK.vox",0 "@" ;press 1 if correct, any other key to cancel

OKInput = GetDigits 1,"@",15

If OKInput = "1" then GoTo SendFax
If OKInput <> "1" then GoTo getFAX#

Check for long distance

SendFax:
areacode = left faxnol, 3

Msgbox "Fax Number value is"
msgbox "Did it display the fax number correctly?"
msgbox faxno
emailsubject "this is documents faxed with Windows 2000"

if areacode = "864" then ;local call since in same area code

;

;**** see if prefix is longdistance

;

Prefixfax = middle faxnoi, 4,3

opendb prefix, "Prefix"

SeekDB prefix, =, prefixfax ; locate record in ODT Vision.mdb database record that match phone exchange to see if long distance

If MatchDB Then

Exchange found in db, long distance

msgbox "Exchange is long distance"

FaxNo = "[fax:9,1," & FaxNol
faxno = faxno & ",,SuffixCode]" ; this is the long distance

else

Exchange not found in db, local

msgbox "Exchange is not found, local call"
faxnol = right faxnol, 7

FaxNo = "[fax:9," & FaxNol

faxno = faxno & "]"
msgbox faxno

Endif

ELSE; This is long distance outside our areacode

Outside Area Code, long distance

msgbox "This is long distance outside of the areacode"
FaxNo = "[fax:9,1," & FaxNol

faxno = faxno & ",,suffixCode]"
msgbox faxno

ENDIF

msgbox "value of fax number"
msgbox faxno
email faxno

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