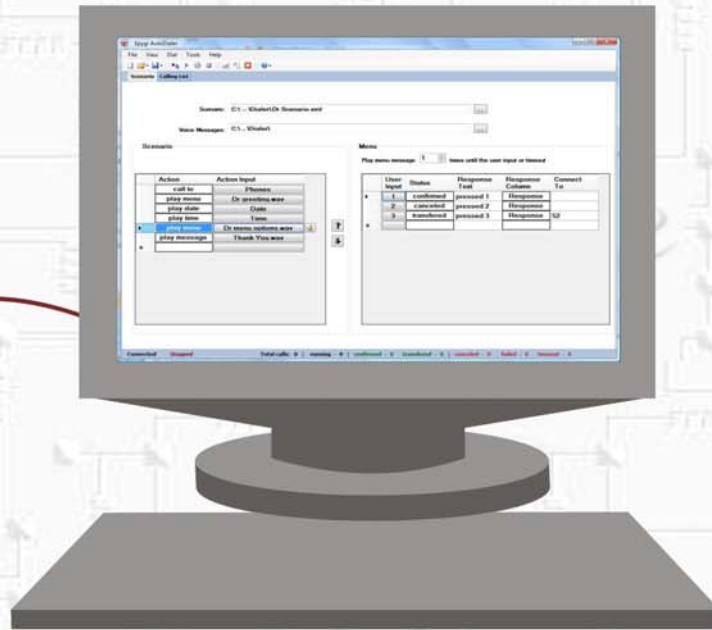


Auto Dialer



PSTN

Internet

Manual: Call Scenarios

Edition 1 SW Release 1.0.5 and higher, June 2011

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Description

This document will provide the user with several call scenario examples using the Epygi Auto Dialer feature. For specific details on configuring the Auto Dialer feature, please refer to the Auto Dialer User's Guide. Additional scenarios will be added as required.

Market

The Auto Dialer's target markets are small doctors' offices, independent pharmacies and other service providers that call their customers on a daily basis as part of their operating procedures. Some of the usage scenarios are as follows:

Doctor offices – A doctor's office calls their patients on a daily basis to confirm their appointments for the week and to minimize no-show appointments, which cost the doctor time and money. Doctors do this manually by using the front office staff to place the calls. Many times they have to call more than once if there is no answer, voice mail is encountered or the wrong person answers. In some cases, the patient needs to reschedule their appointment time and contact the doctor's office directly.

Small local pharmacies – Large pharmacy chains have very expensive phone systems, tied to their ERP systems that perform automated calling to alert patients when their prescriptions are ready. These systems also allow patients to call into the IVR and automatically refill prescriptions by entering their specific prescription number using the phone keypad. These systems are not always affordable, especially for small, independent pharmacies which have to rely on staff to call customers when their prescriptions are filled and ready to be picked up.

Telemarketing – Telemarketers prepare recorded promotions based on a customer database and place calls to selected customers who are given the option to talk to an agent or opt out.

Scenario 1: Doctor's Offices

Description – In this scenario, the Auto Dialer will be used to contact patients to confirm their upcoming appointments. Prior to calling, the contact list will need to be updated with the patient's name, phone number and the appointment date and time. When the Auto Dialer is started, it will begin placing calls to each of the patients. When the call is answered, the patient will confirm they are the correct contact. The Auto Dialer will play the date and time for the appointment and the patient will be prompted to enter one of three options:

1. Confirm the appointment.
2. Cancel the appointment.
3. Speak to the receptionist or to reschedule the appointment.

Sample Files

Audio Files:

- AutomatedMsg.wav Hi! This is an automated message. Press 1 if you are a patient of Dr White. Press 2 if you are not.

Please Note: If the Auto Dialer will be calling out on a PSTN POTS line using one of the Quadro FXO ports then this file should be kept as short as possible and recorded so that the user can listen to any part of the message and understand the intent. Calls placed on an FXO port do not return answer supervision so the Quadro cannot start the message from the beginning when the caller actually answers and says, "Hello". The Auto Dialer can be configured to repeat this message so that it can be heard in its entirety.

- Dr Greeting.wav: We are calling to confirm your appointment on:
- Dr Menu Options.wav: To confirm your appointment, please press option 1: To cancel your appointment press 2: To speak to a receptionist or to reschedule your appointment, please press option 3.
- Thank You.wav: Thank you, and have a good day!

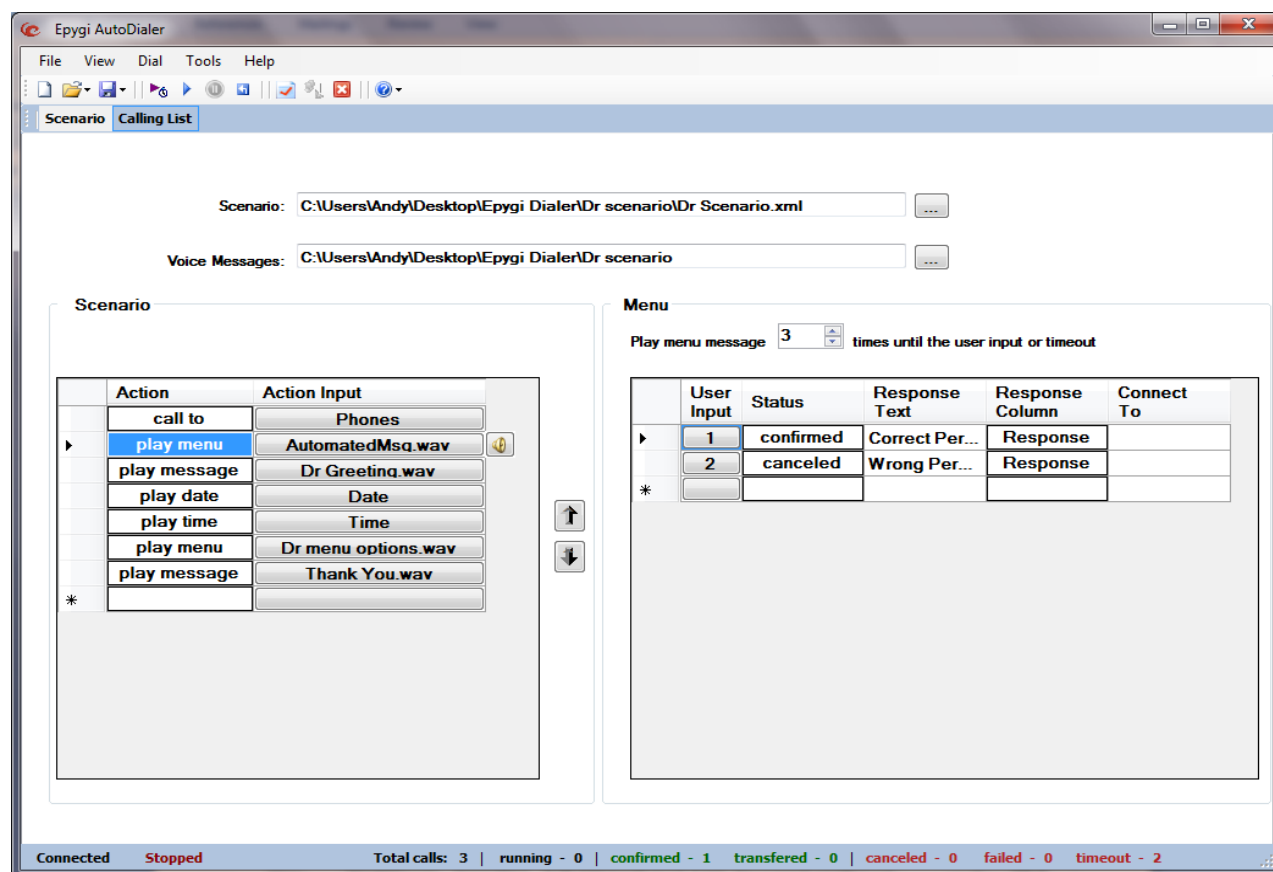
Contact List:

- Drs Patient List- This is a file that can be created using an application like MS Excel™ and saved in CSV (Comma Separated Values) format.

Scenario Summary

| Dr. Scenario to Confirm an Appointment | | | | |
|--|---|--|---|---------------------------|
| Action | Instructions | Instructions taken from Calling List Column: | Column(s) Updated | Input Menu |
| MAIN MENU: | | | | |
| Call | Dial contacts from Calling List (file- Drs Patient List) | Phones | | |
| Play Menu | AutomatedMsg.wav Hi! This is an automated message. Press 1 if you are a patient of Dr White. Press 2 if you are not. | | | Customer Input Options #1 |
| Play Message | Dr Greeting.wav: We are calling to confirm your appointment on: | | | |
| Play Date | Play date from Calling List | Date | | |
| Play Time | Play time from Calling List | Time | | |
| Play Menu | Dr Menu Options.wav: To confirm your appointment, please press option 1: To cancel your appointment press 2: To speak to a receptionist or to reschedule your appointment, please press option 3. | | | Customer Input Options #2 |
| Play Message | Thank You.wav: Thank you, and have a good day! | | | |
| Customer Input Options #1 | | | | |
| 1 | Correct person | | Status = Confirmed & Response = Correct person | |
| 2 | Wrong person | | Status = Canceled & Response = Wrong person | |
| Customer Input Options #2 | | | | |
| 1 | Appointment confirmed | | Status = Confirmed & Response = Confirmed Appt. | |
| 2 | Appointment canceled | | Status = Confirmed & Response = Canceled Appt. | |
| 3 | Transfer to a Receptionist | | Status = Transferred & Response = Transferred | |

Auto Dialer Scenario



Drs Patient List

The following shows the resulting status of the CSV file called, Drs Patient List.

| Name | Phones | Date | Time | Response | _CallState | _Status | _Attempts | _DoNotCall |
|----------|-------------|------------|---------|----------------|------------|------------|-----------|------------|
| Andy | 99725551212 | 11/23/2011 | 9:45 AM | Confirmed Appt | Answered | confirmed | 1 | TRUE |
| Jim | 92145551212 | 5/29/2011 | 4:30 PM | Wrong Person | Answered | canceled | 1 | TRUE |
| Bob | 99725551212 | 5/10/2011 | 8:30 AM | Transferred | Answered | transfered | 1 | TRUE |
| Susan | 94071234567 | 5/11/2011 | 8:45 AM | | Answered | timeout | 3 | TRUE |
| Rolando | 92141234567 | 5/9/2011 | 9:30 AM | | Closed | failed | 1 | TRUE |
| Mary | 92145551111 | 5/12/2011 | 9:30 AM | Confirmed Appt | Answered | confirmed | 1 | TRUE |
| Edward | 92147654321 | 5/13/2011 | 9:45 AM | | Answered | timeout | 1 | TRUE |
| Kate | 93057654321 | 5/14/2011 | 8:30 AM | | Closed | failed | 1 | TRUE |
| Vicky | 93055551212 | 9/12/2011 | 8:25 AM | Transferred | Answered | transfered | 2 | TRUE |
| Nicholas | 92125551212 | 8/5/2011 | 9:32 AM | Transferred | Answered | transfered | 1 | TRUE |

The columns with the heading beginning with an "_" (_CallState, _Status, _Attempts, and _DoNotCall) are updated by the Auto Dialer as calls are being made.

Andy- Answered the call and confirmed the appointment

Jim- The call was not for him.

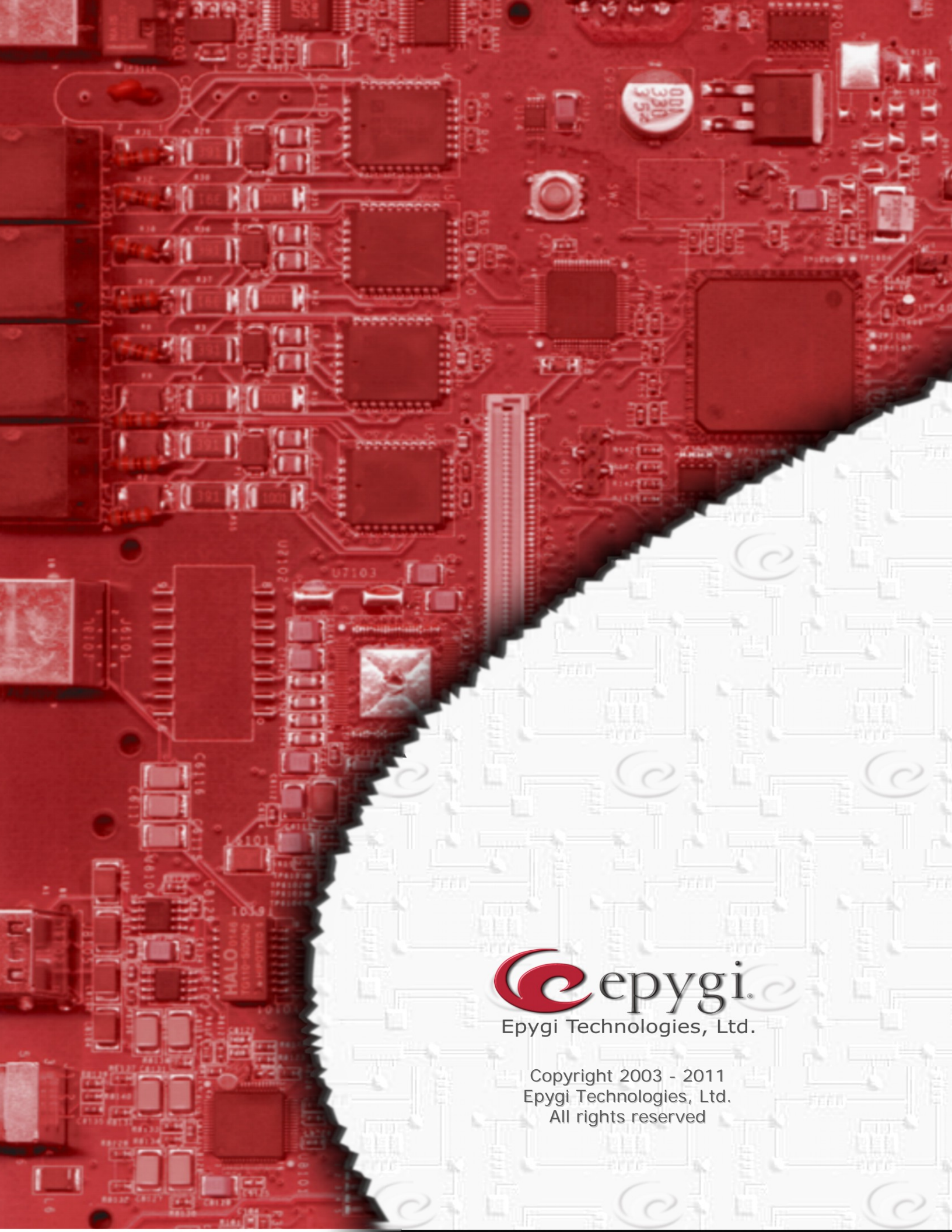
Bob- Pressed option 3 to transfer to the receptionist.

Susan- The call might have gone to voicemail since the call was answered but they never confirmed any option.

Rolando- The call did not complete.

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