Technical Note

Configuration

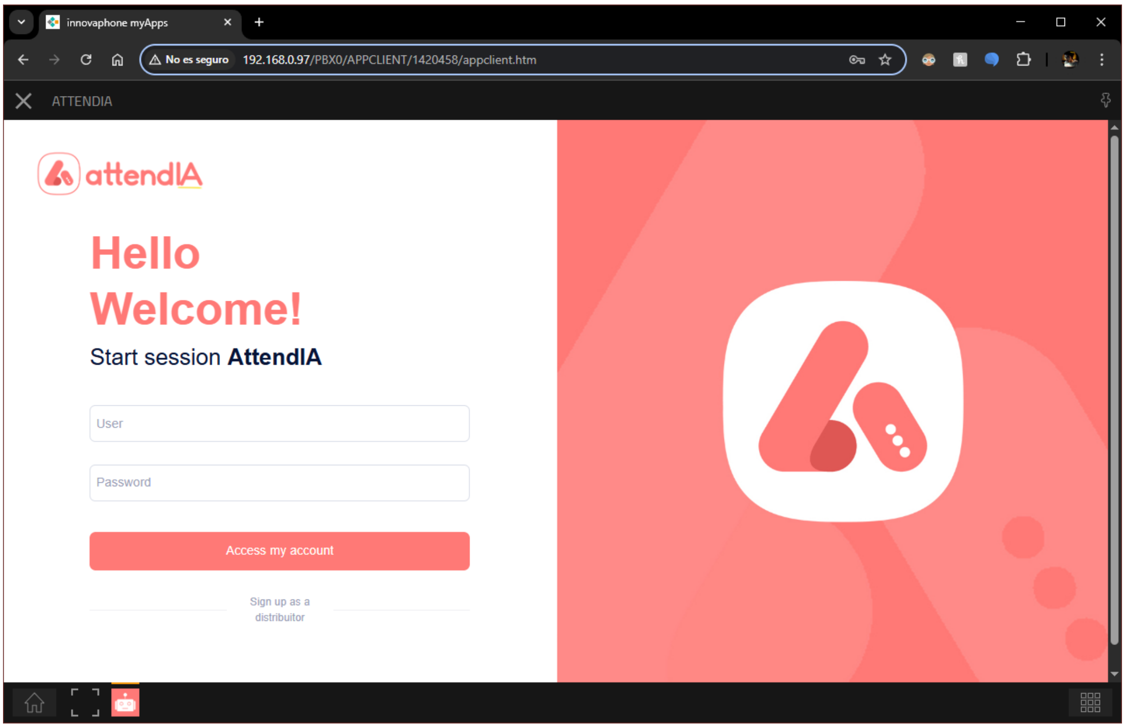
on innovaphone myApps

CONFIGURATION ON INNOVAPHONE MYAPPS

This document outlines the configuration steps required to set up the AttendIA application within the innovaphone myApps environment. The guide includes the process for registering a distributor, verifying the account, and accessing the main dashboard interface.

1. Access AttendIA on myApps

Launch the AttendIA application from the innovaphone myApps interface. You will be presented with the login screen.



2. Register as a Distributor

Click on the link 'Sign up as a distributor' below the login form. This will redirect you to the distributor registration form.

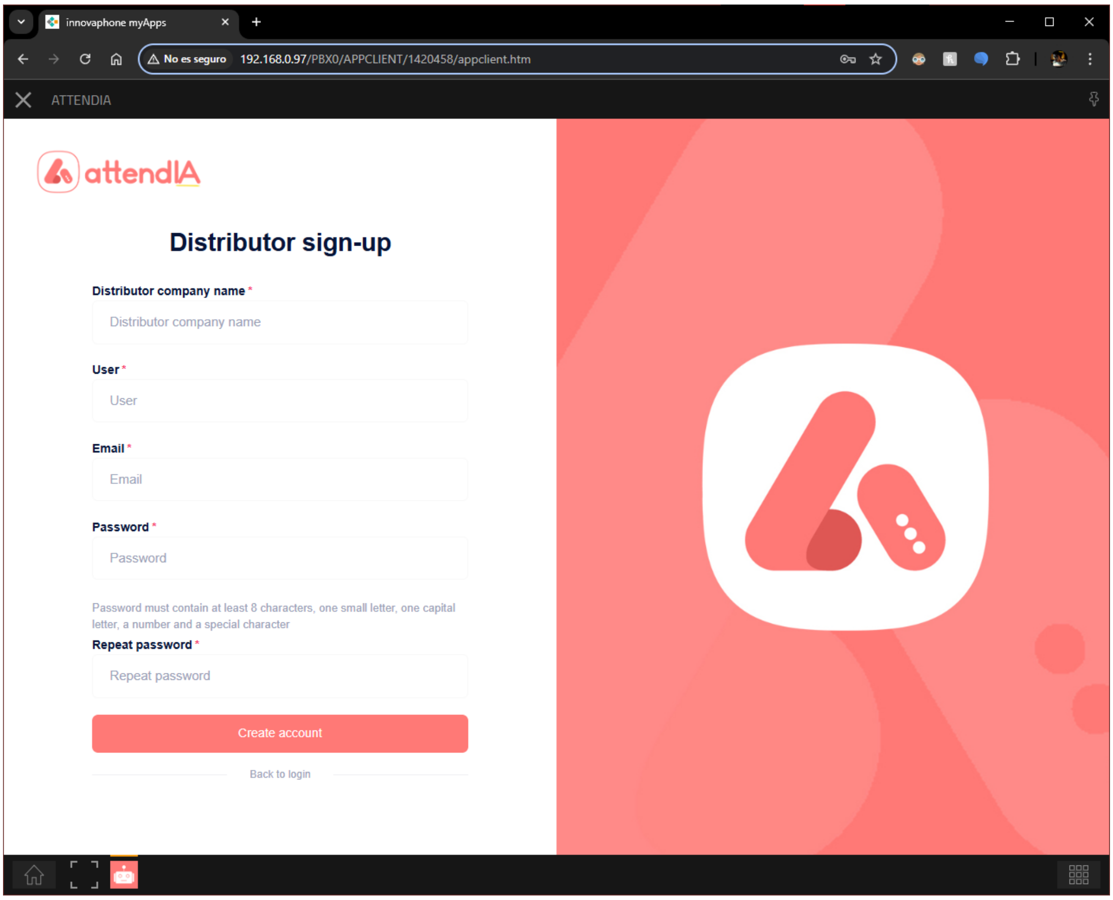
This type of user is intended for innovaphone distributors and system integrators only. It is not meant to be created by end customers themselves. Final customer accounts must be created under the responsibility of their respective distributor or integrator.

Only one distributor account can be registered per email domain. If your company has already created a distributor account, you should log in using the associated email address and password. If you don't know them, please contact your company's administrator.

Creating a distributor account is free of charge. Under a distributor account, you can also create customer accounts and assign each one a bot—also free. However, each bot will only be functional for up to 30 minutes of total call time. After this limit, the system will reject further calls with a busy tone.

As will be detailed later, creating a customer account requires assigning a SIP trunk pointing to the IP address `innovaphone.fidelitycloud.es:6060` over TCP. You will also need to provide the source IP of the trunk for firewall rule authorization, as well as assign a DDI (direct dial-in number) to allow incoming calls to be handled by AttendIA.

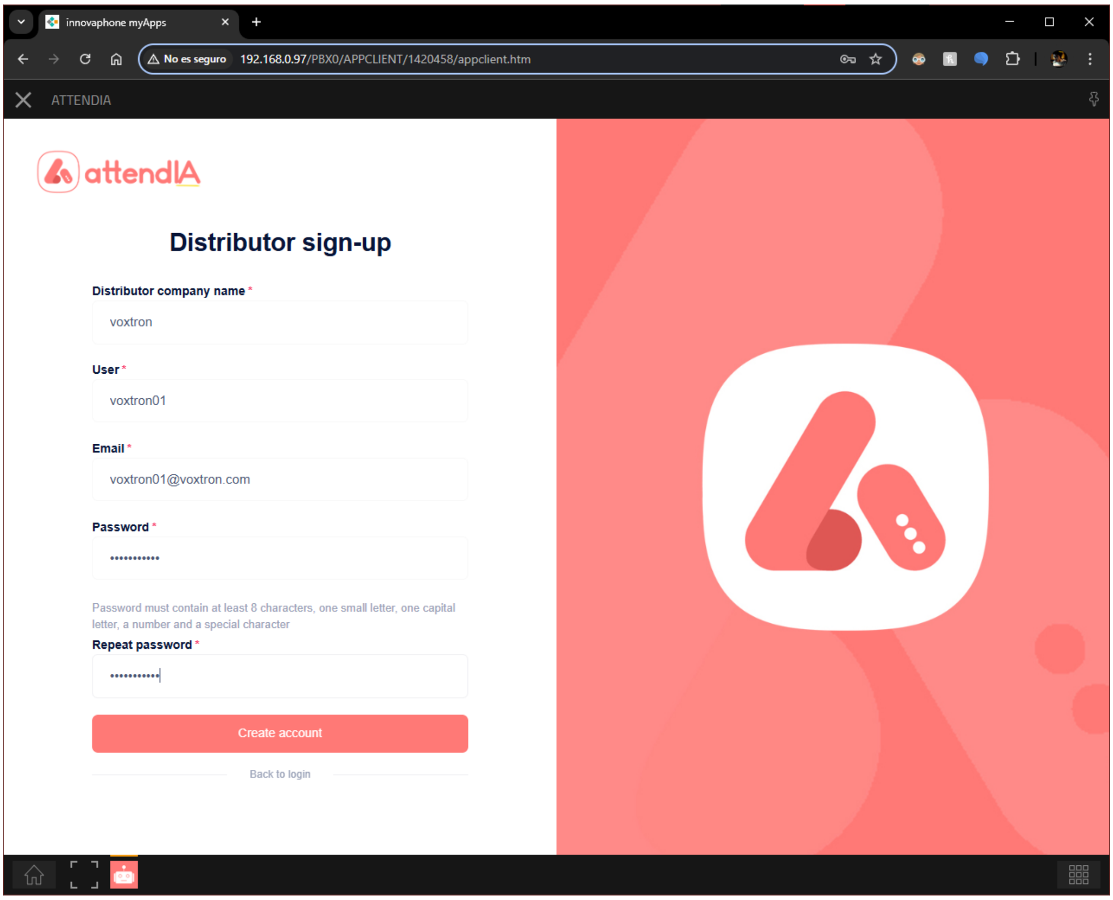
If you already have a distributor account, and your goal is to create a customer account under it, you may skip this step and go directly to section 8.



3. Fill in the Registration Form

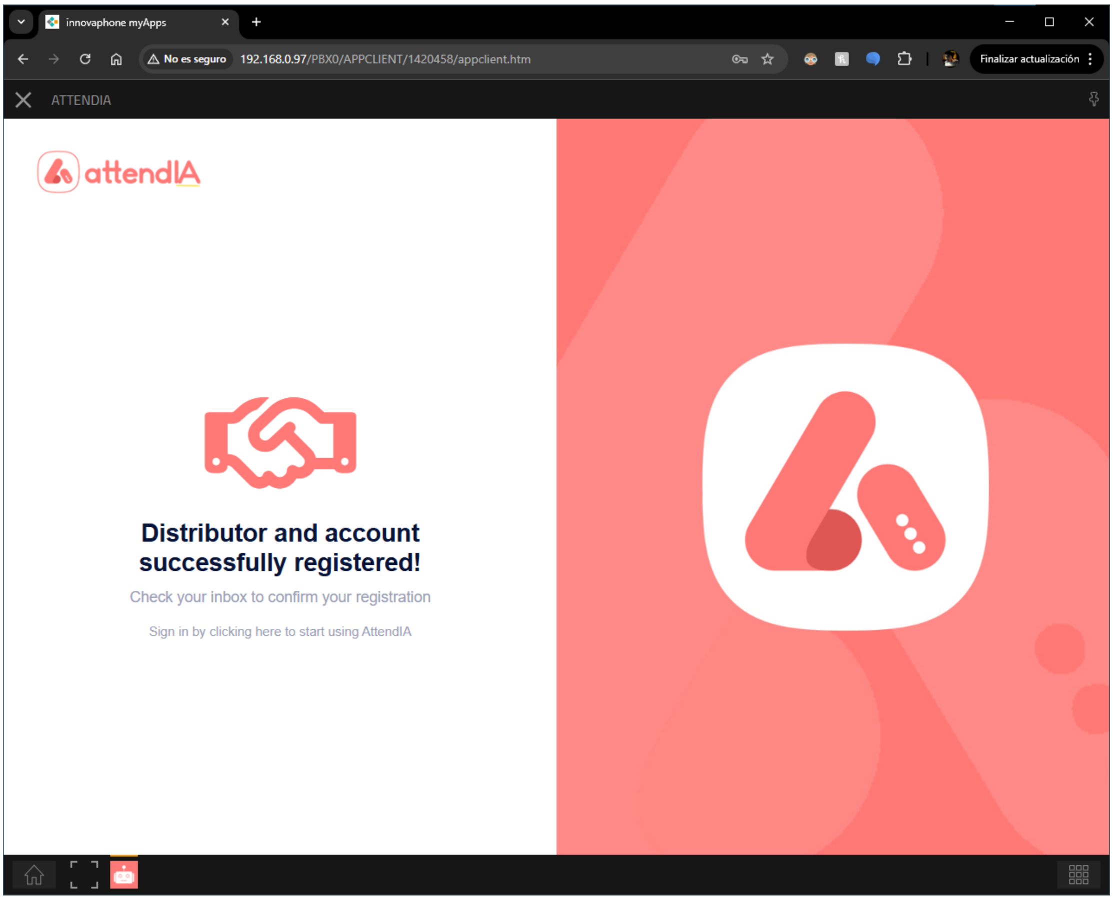
Provide the required details: company name, desired username, email address, and a secure password. Repeat the password to confirm and click on 'Create account'.

Please note that only one distributor account can be registered per email domain. If your company has already created a distributor account, you should log in using the associated email address and password. If you are unsure of the credentials, please contact your company's administrator.



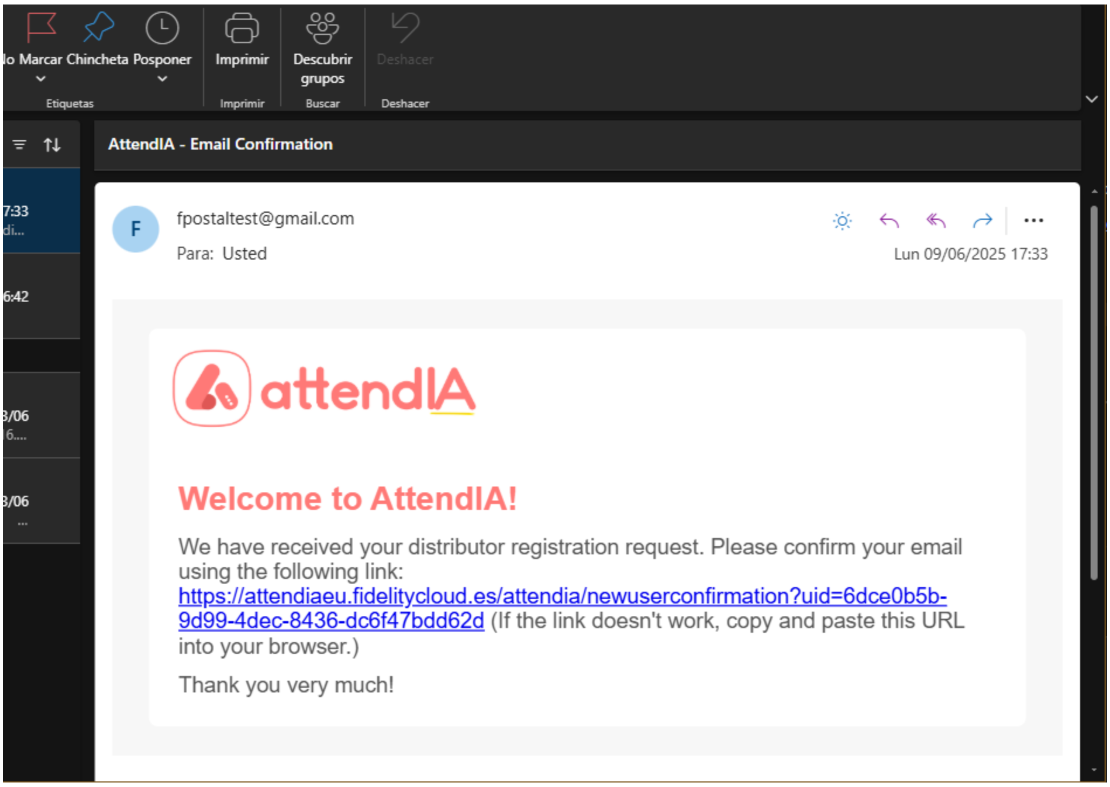
4. Confirm Registration

Upon successful registration, a confirmation screen will appear. You will also receive a confirmation email.



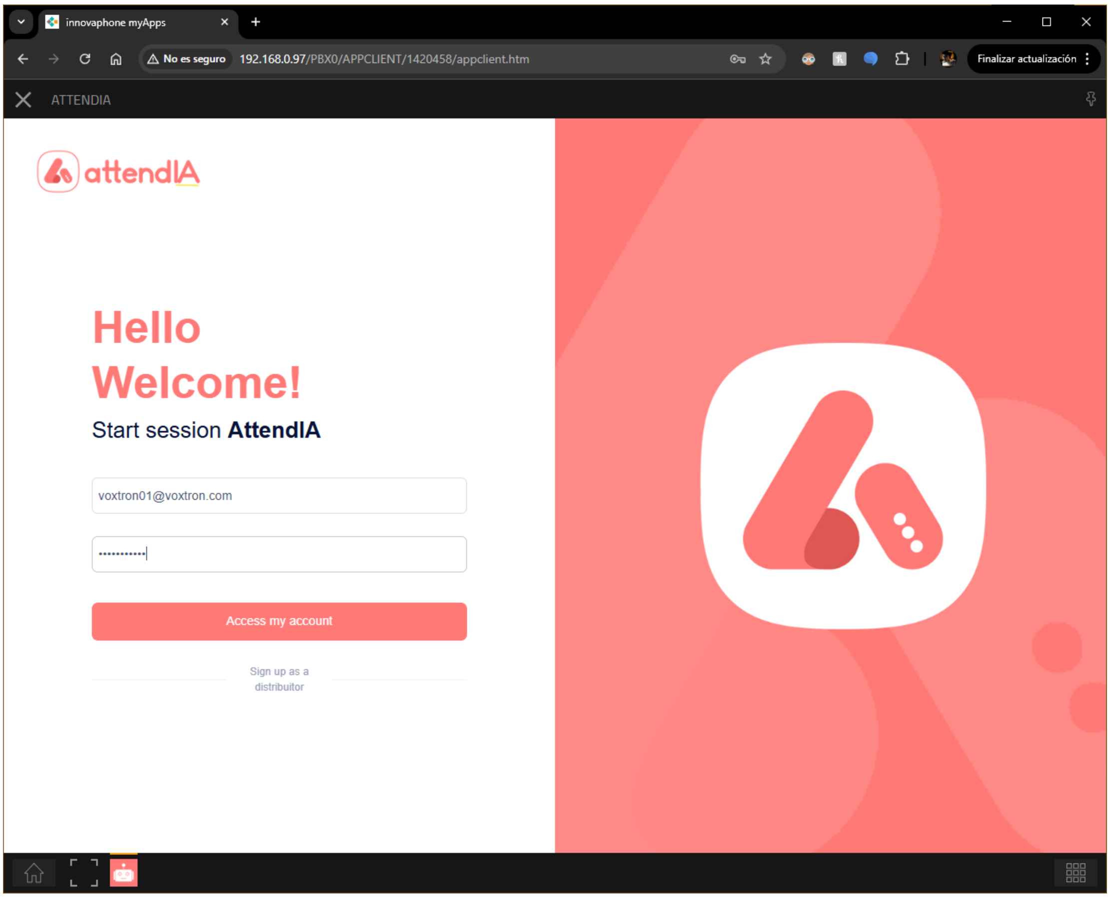
5. Confirm Email Address

Open the email account provided during registration and click on the confirmation link to activate your account.



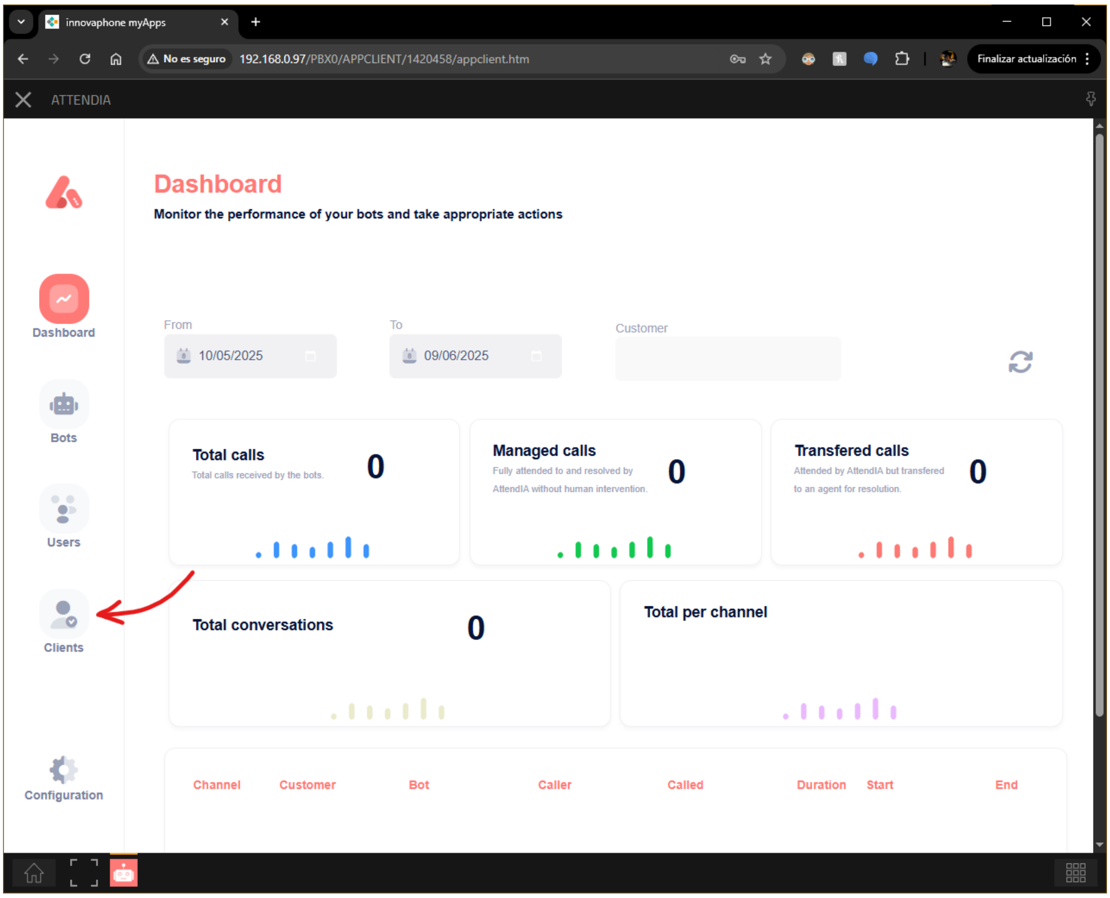
6. Log In

Return to the login screen and enter your credentials to access the AttendIA dashboard.



7. Dashboard Overview

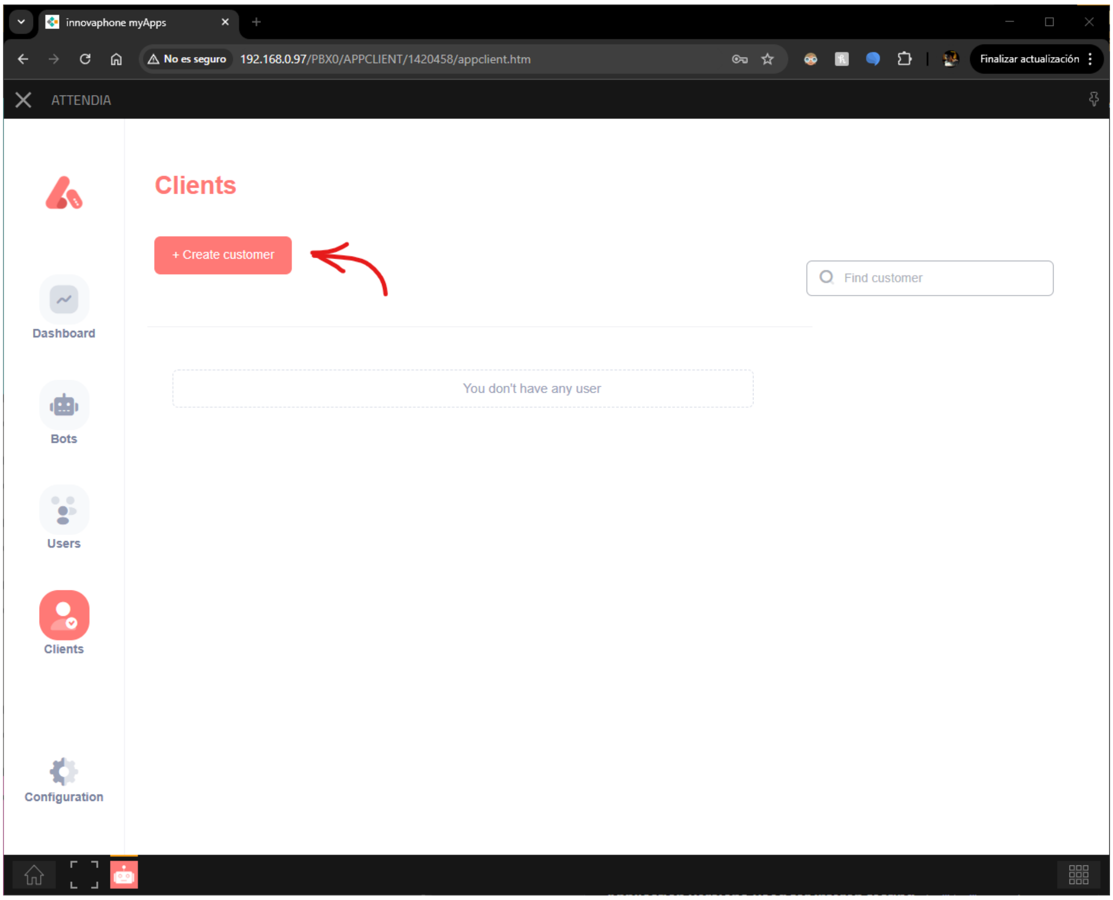
After logging in, you will reach the main dashboard where you can monitor the bot activity and call statistics.



8. Create a Customer

Navigate to the 'Clients' section from the sidebar and click on '+ Create customer' to add a new client.

As a distributor user integrating innovaphone for end customers, you can create as many clients as needed. This incurs no additional cost.



9. Enter Customer SIP Trunk Details

Before finalizing the creation of a customer, you the integrator must first configure a SIP trunk from your innovaphone PBX that points to the AttendIA server at innovaphone.fidelitycloud.es:6060 over TCP.

Once the trunk is correctly established, fill in the following required information in the client creation form:

- **Name**: A descriptive name for the client (e.g., company or brand).
- **Public PBX IP**: The public IP address of the customer's innovaphone PBX that will initiate the SIP trunk connection.
- **Remote Port**: The port used by the customer's PBX for the SIP trunk traffic.
- **DDI**: A direct dial-in number assigned to this customer and trunk, that external users can call to reach the AttendIA bot.

All this information is essential to properly route incoming calls and allow the AttendIA platform to establish communication with the client PBX through the appropriate firewall rules and SIP trunking settings.

The **Prefix** field is reserved for internal use by Jusan customer support and should be left blank. It will only be configured later, when a full production license is requested.

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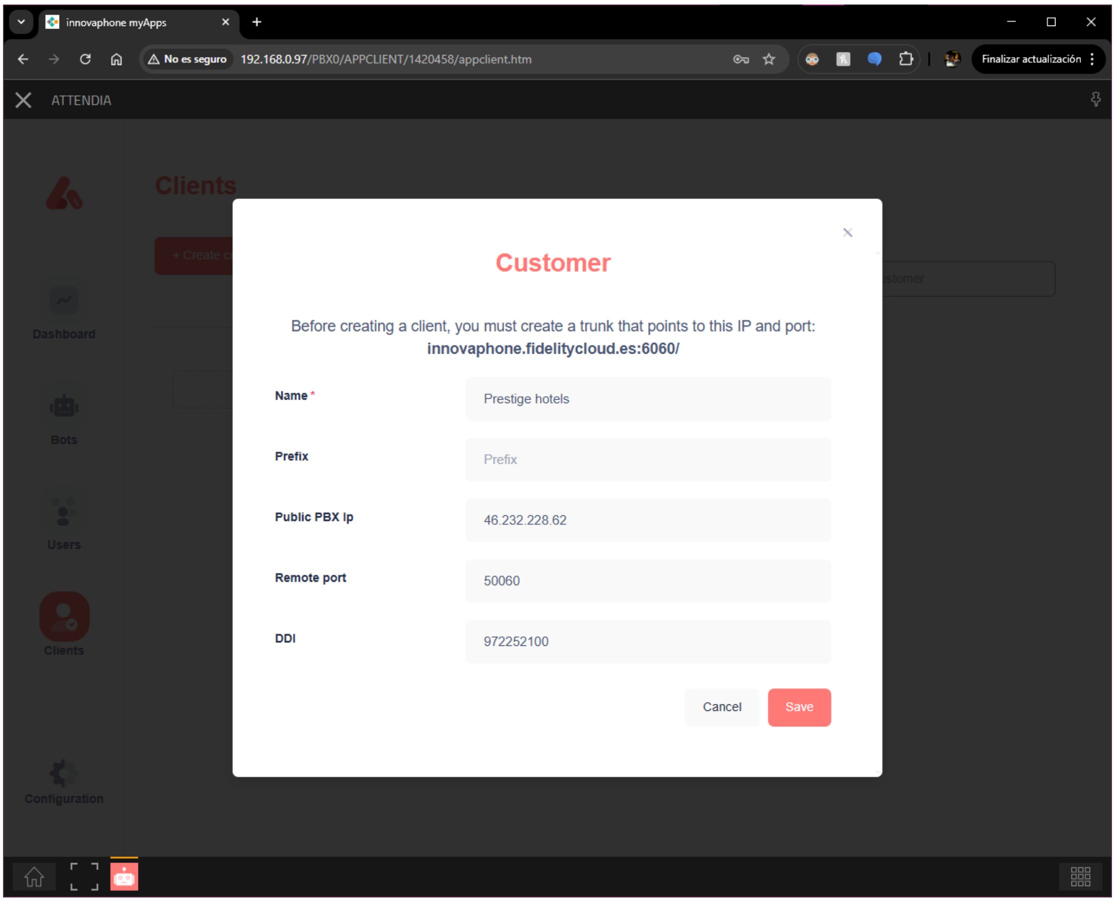
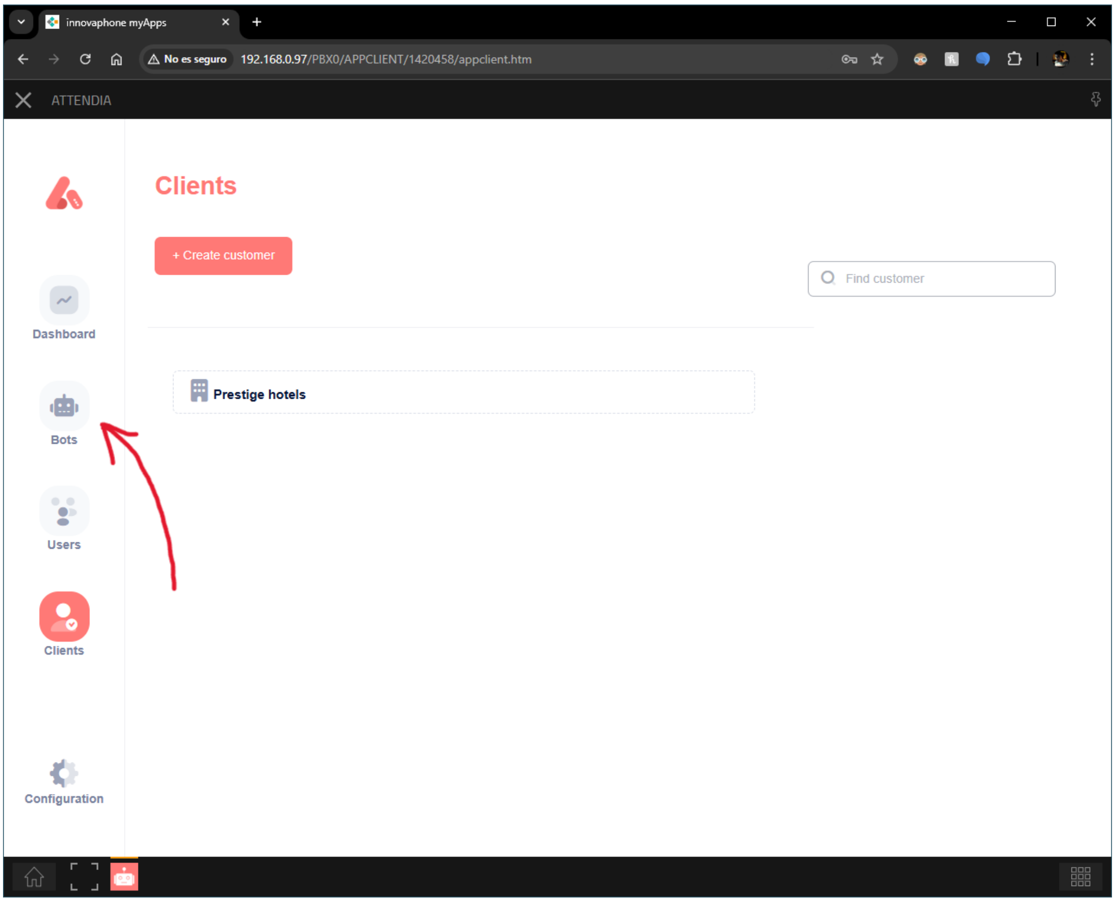


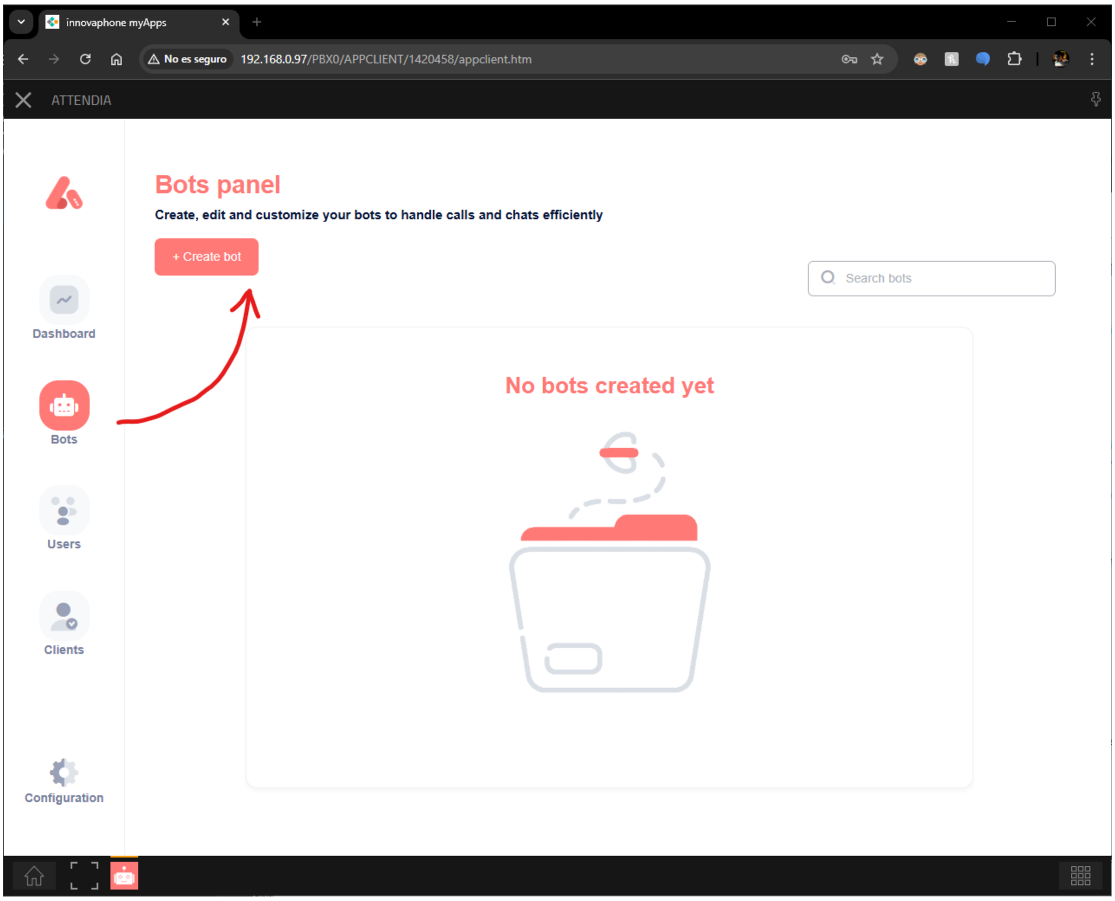
10. Navigate to Bots Panel

In the main sidebar, click on the 'Bots' icon to open the Bots panel where you can manage all bots associated with your customers.



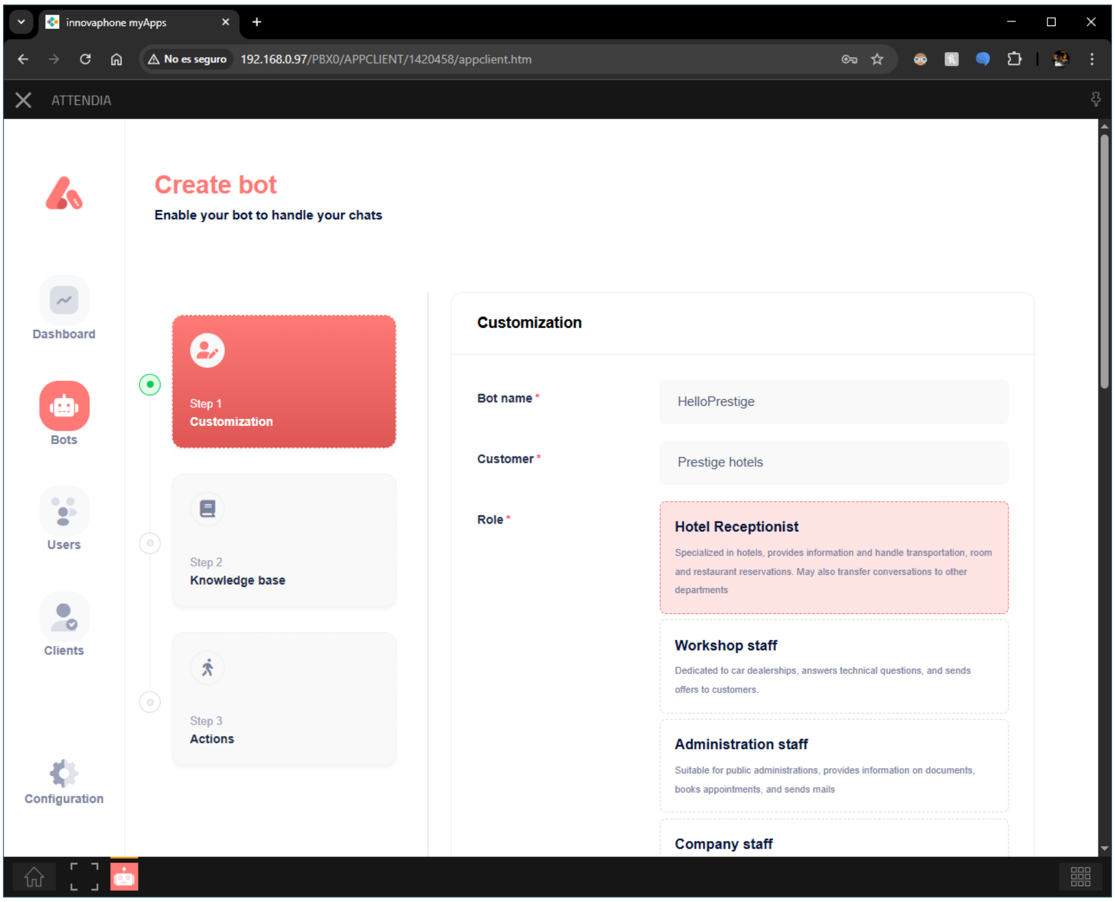
11. Create a New Bot

Click on '+ Create bot' to begin configuring a new bot for the selected client.



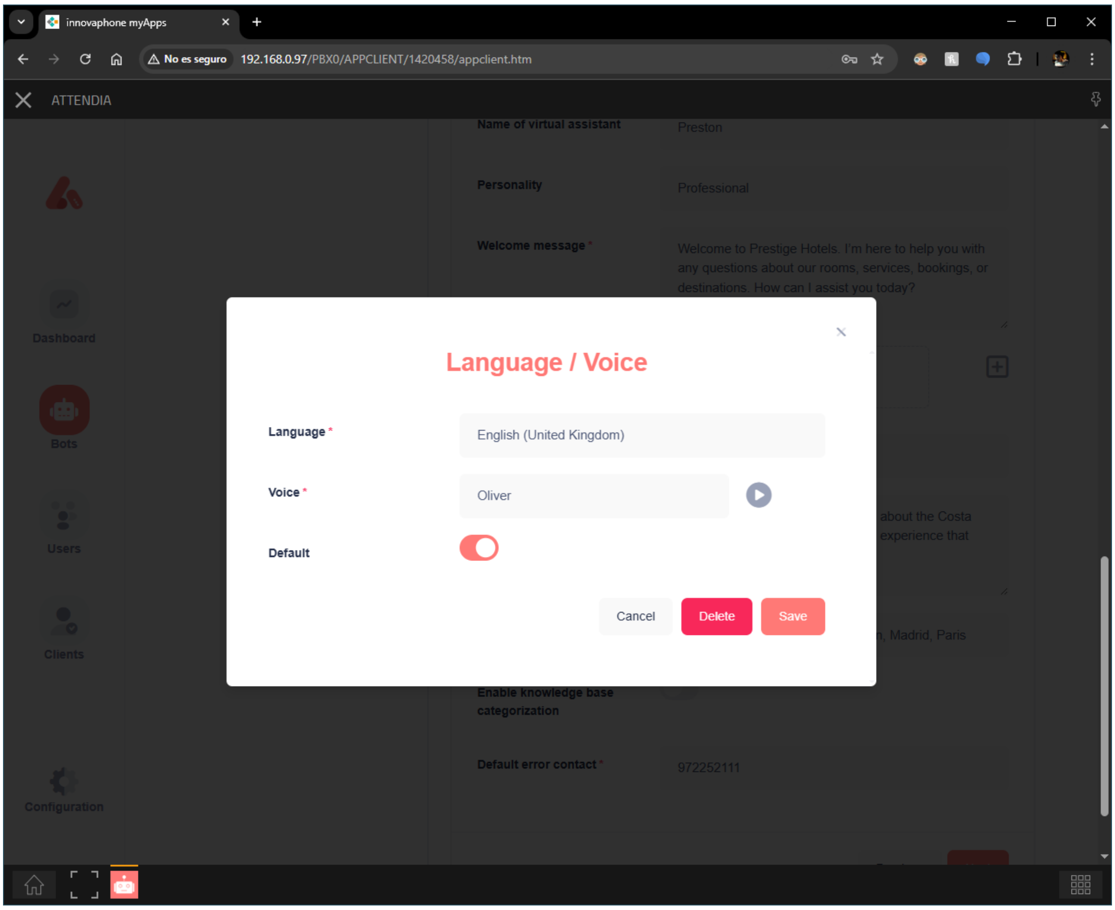
12. Step 1: Customization

Define the bot's basic settings: name, associated customer, and role. Choose a role that best fits the bot’s responsibilities (e.g., Hotel Receptionist, Workshop Staff, Administration Staff).



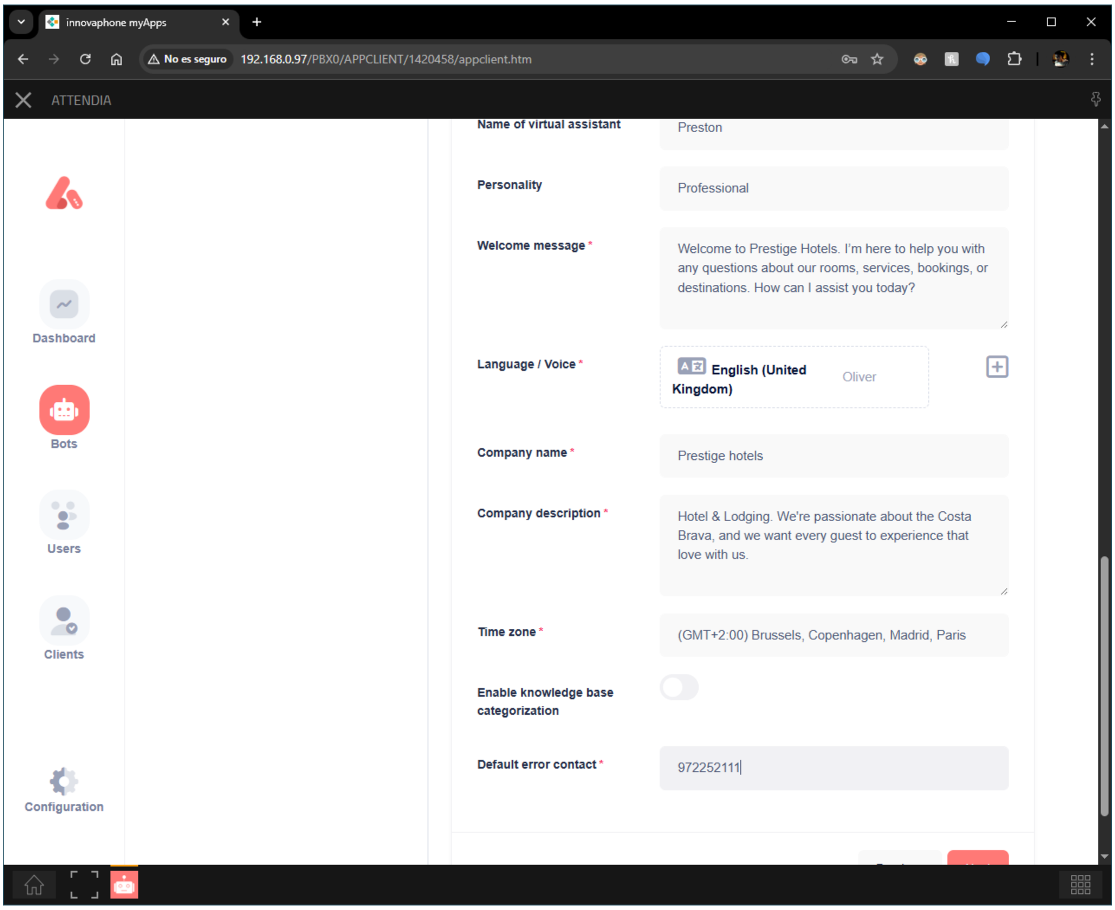
13. Step 1: Language and Voice

Select the primary language and voice for your bot. Toggle 'Default' to activate this voice configuration.



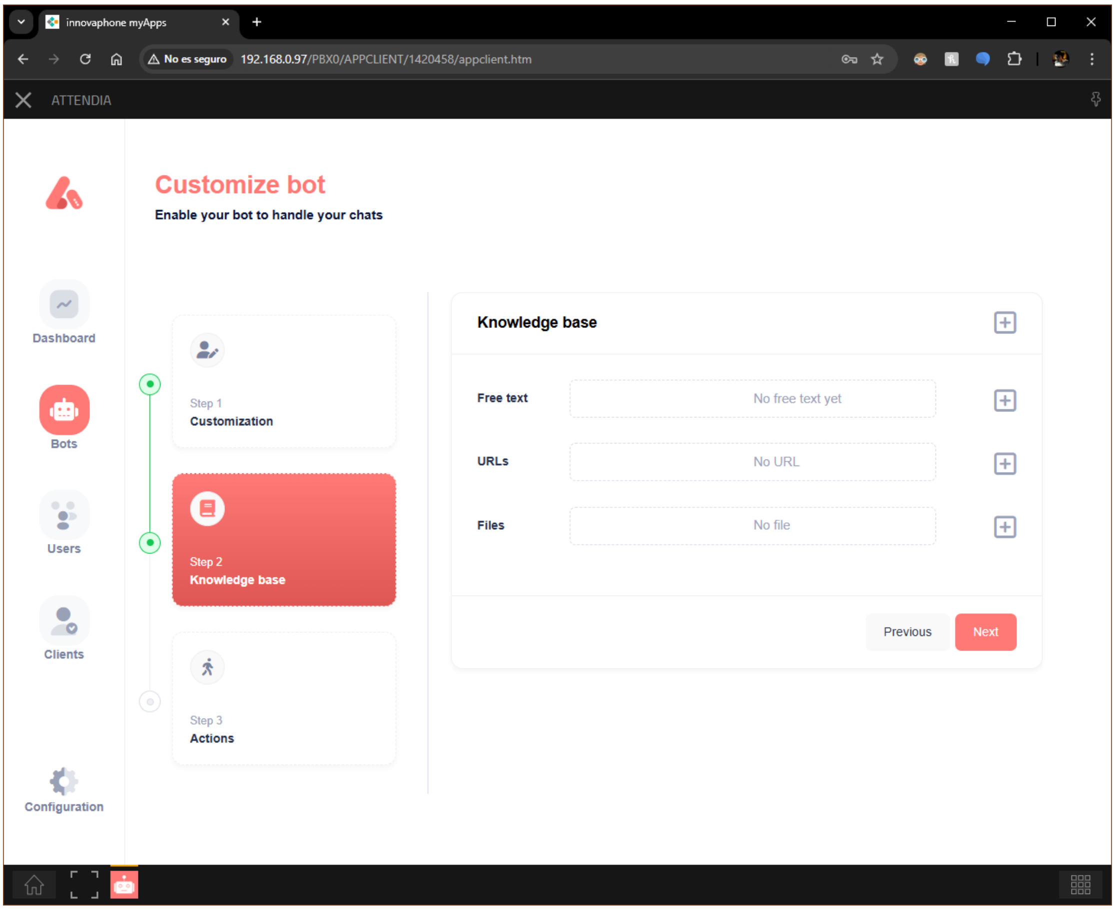
14. Step 1: Company Information

Provide the company details: name, description, and time zone. Also enter the default error contact number, which will be used if the bot cannot handle a query.

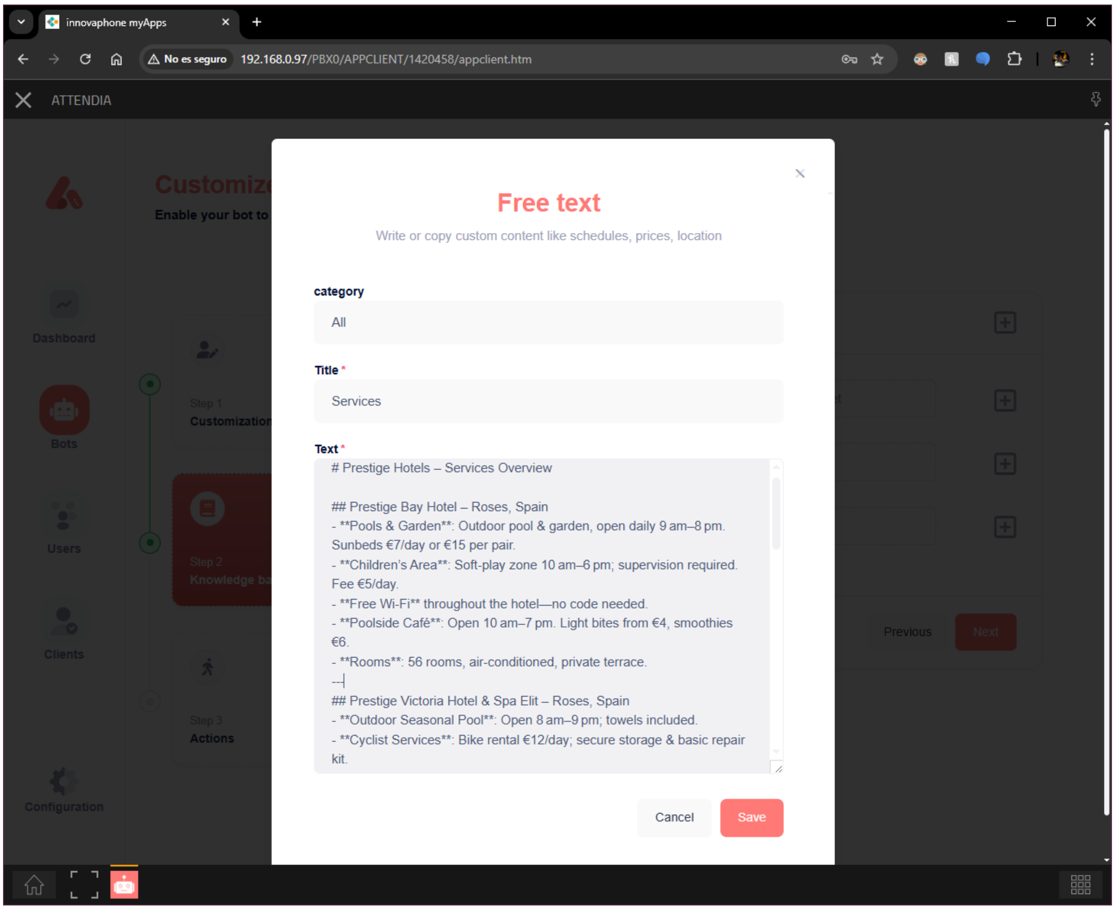


15. Step 2: Knowledge Base

Add custom knowledge content in three categories: Free text, URLs, and Files. This information will be used by the bot to answer caller queries.

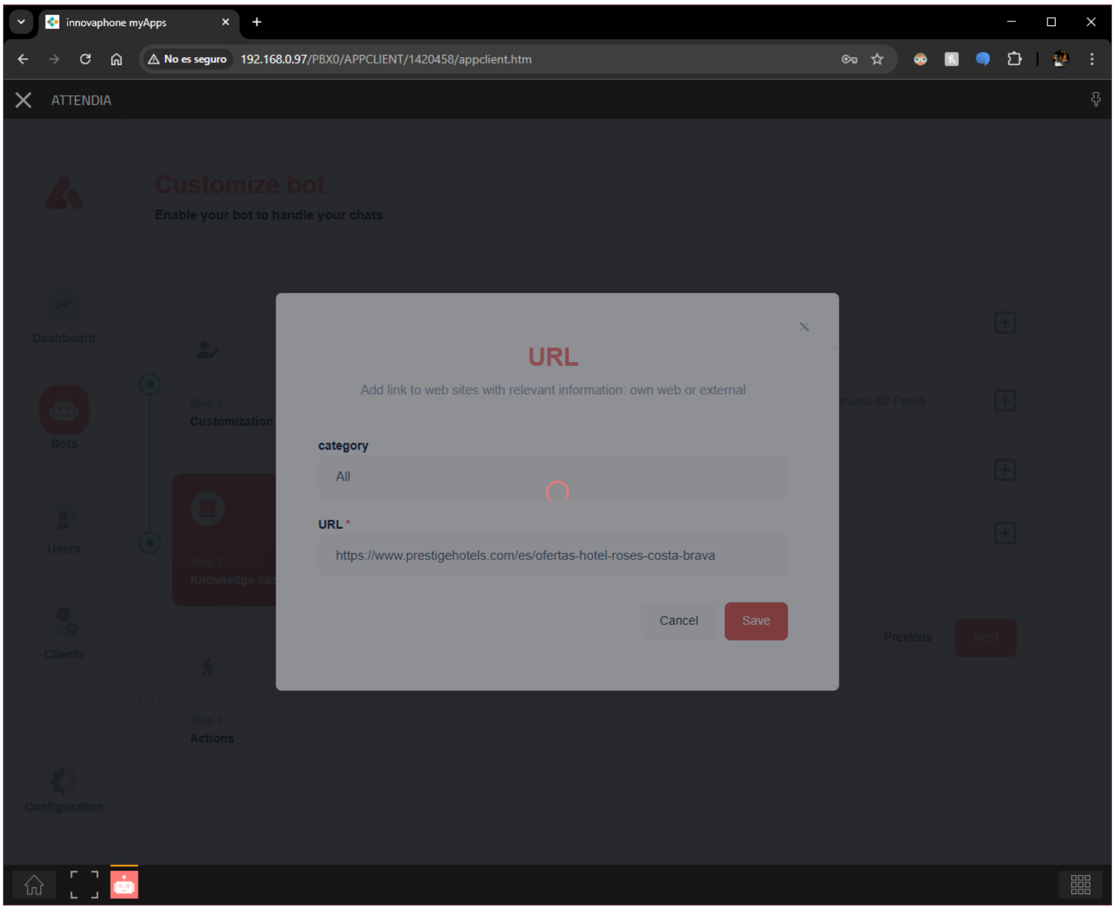


Click the '+' button next to each section to add new entries.



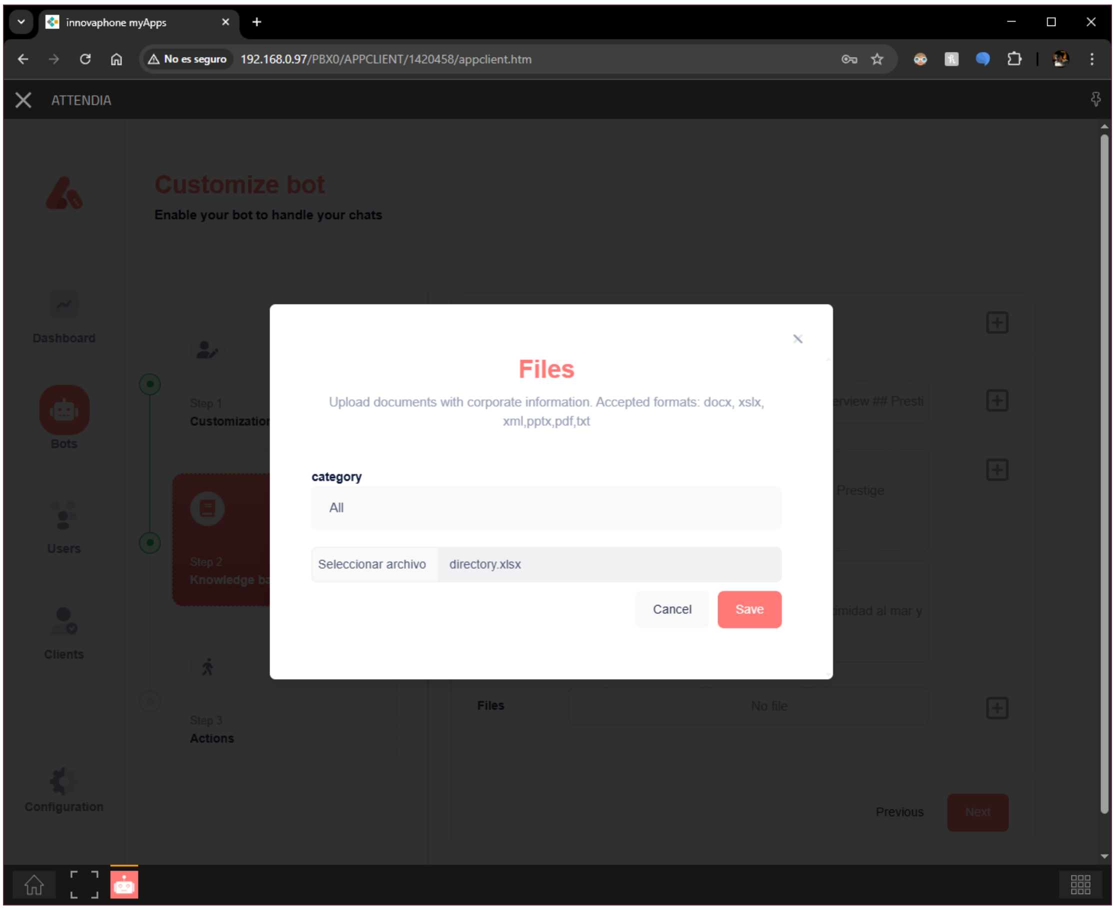
16. Add Free Text Entries

In the Free text section, enter custom content such as schedules, prices, or location details using markdown formatting. After entering the text, click 'Save'.



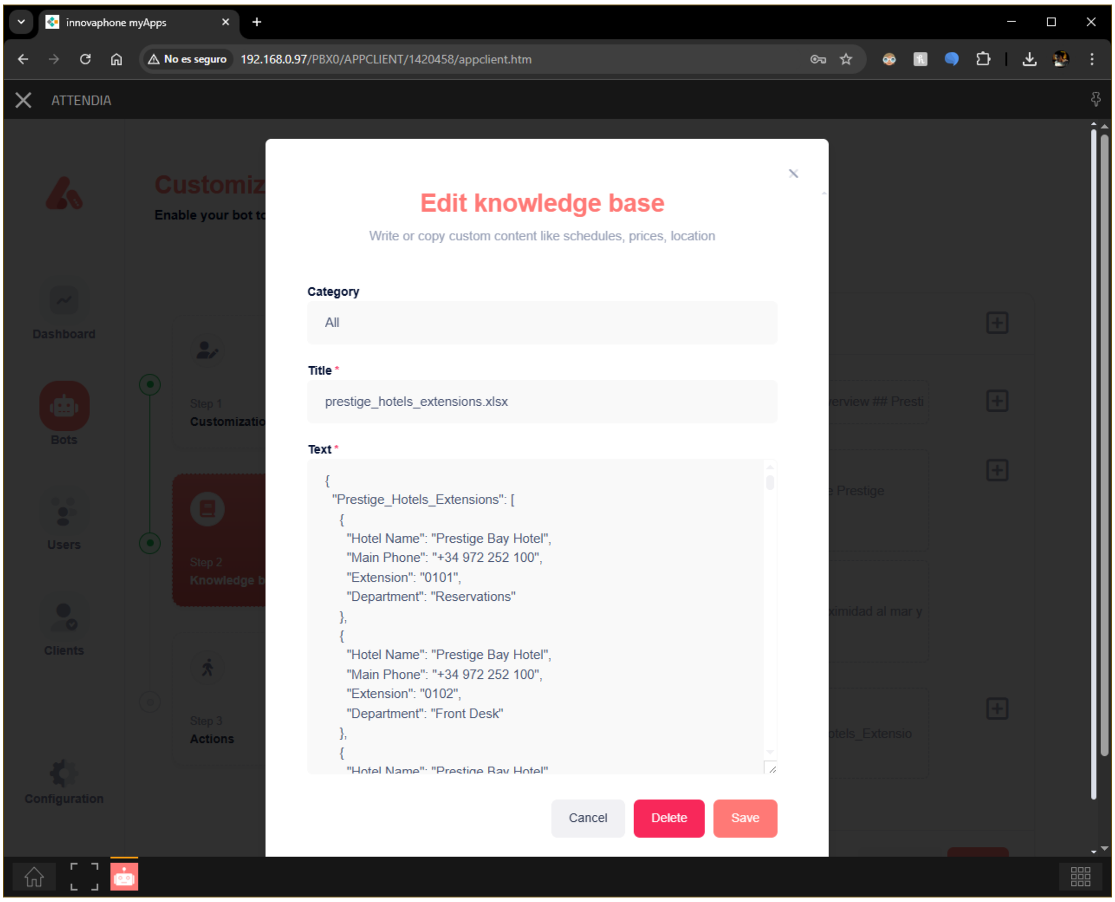
17. Add External URLs

In the URLs section, paste links to relevant web pages that the bot can reference. Ensure that the URLs are publicly accessible.



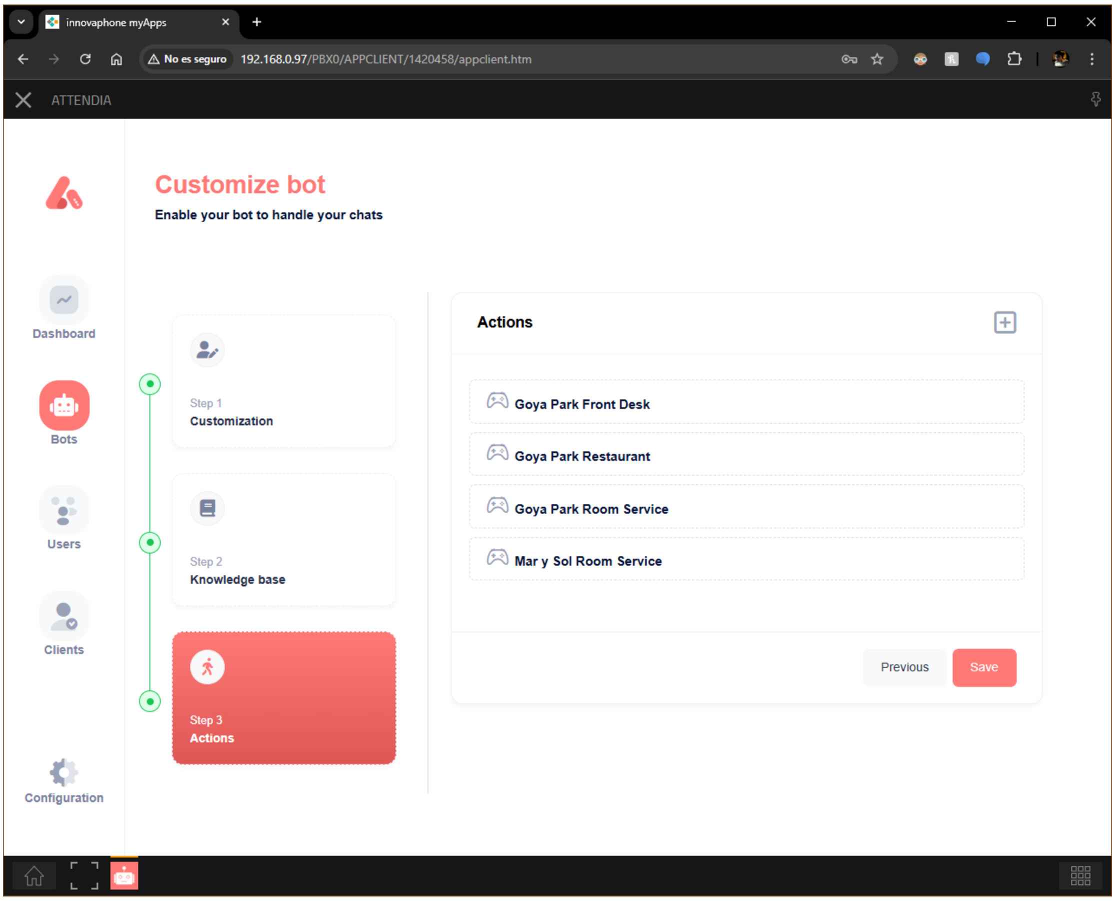
18. Upload Files

In the Files section, upload documents with corporate or product information. Accepted formats include .docx, .xlsx, .pdf, .pptx, and .txt. Click 'Select file', choose your document, then click 'Save'.



19. Step 3: Actions

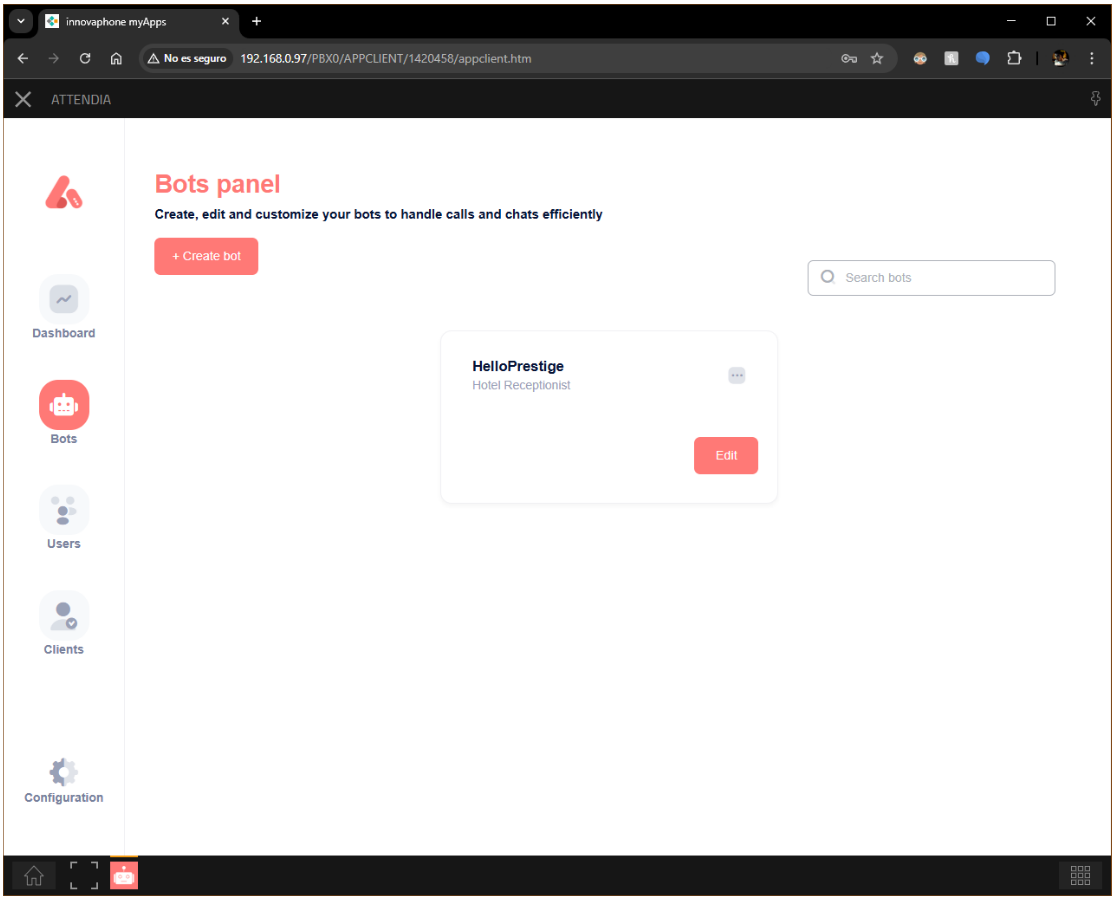
In this final setup step for your bot, define the call transfer actions that the bot can perform. Click the '+' button in the Actions section, then select an action type (e.g., Transfer conversations, Taxi reservation, Room reservation, Restaurant reservation). For each action, provide:
- **Identifier**: A clear name for the action (e.g., Goya Park Room Service).
- **Execution**: A description of when the action should be triggered (e.g., when the user requests room service).
- **Phone number**: The destination phone number for the action (e.g., +34972250306).
Click 'Save' to add each action.



Repeat this process to add all necessary actions your bot will need to handle different types of requests.

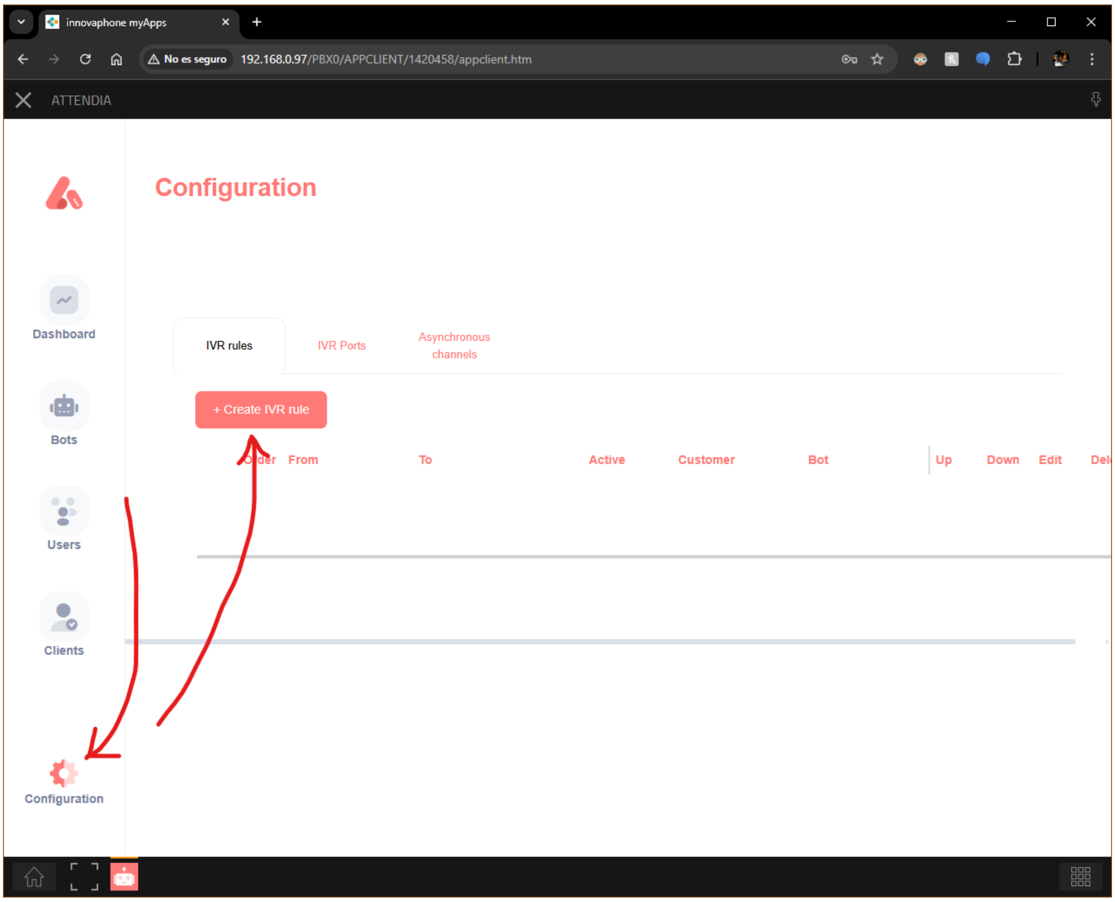
20. Review Bot in Bots Panel

Once all actions are configured and saved, click 'Save' at the bottom of the Customize Bot screen to finalize the bot. You will be returned to the Bots panel, where your new bot (e.g., HelloPrestige) will now be listed. From here, you can edit the bot or create additional bots.



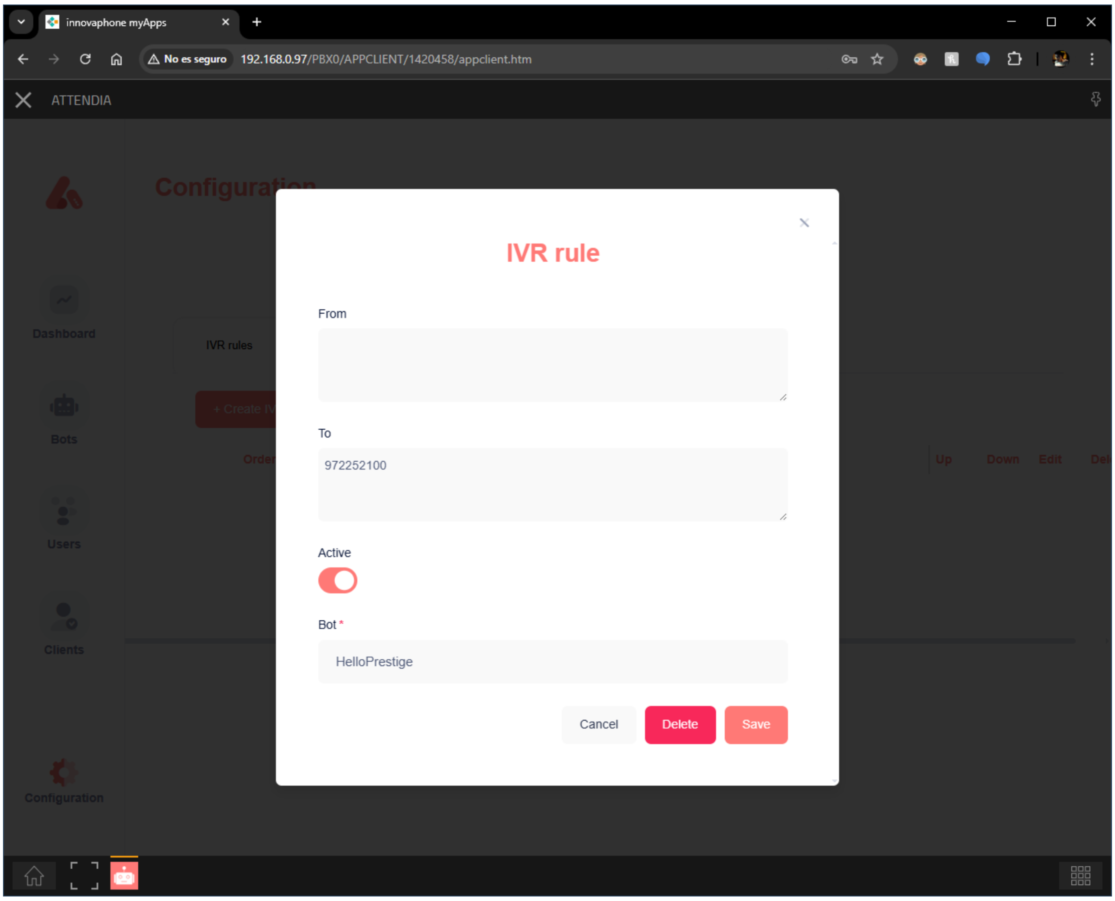
21. Navigate to Configuration Tab

After creating your bot, switch to the 'Configuration' tab in the sidebar. This section allows you to define how incoming calls are routed to your bot via IVR rules.



22. Create a New IVR Rule

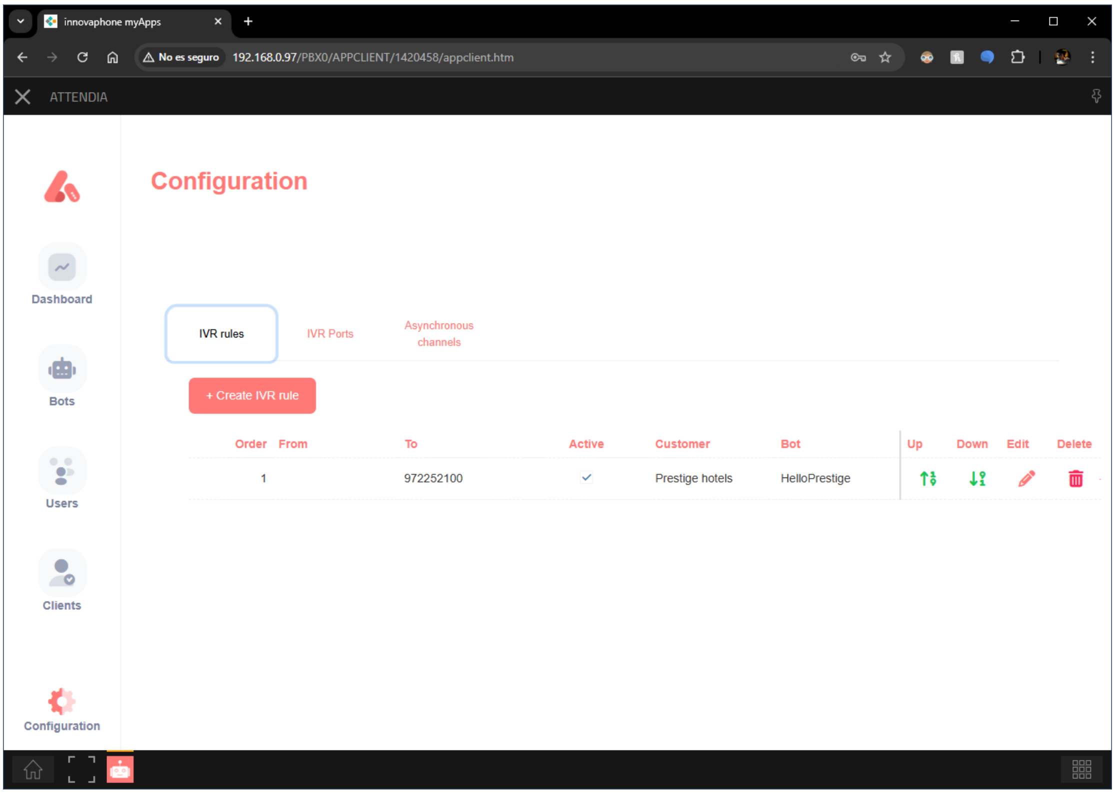
Under the 'IVR rules' tab, click on '+ Create IVR rule' to set up call routing for your bot.



23. Fill IVR Rule Details

In the IVR rule form, provide:

- **From:** (Optional) Caller ID pattern or range.
- **To:** The customer's DDI number assigned earlier (e.g., 972252100).
- **Active:** Enable the rule immediately.
- **Bot:** Select your bot (e.g., HelloPrestige) to handle these calls. Click 'Save' to create the rule.



24. Verify and Test

After saving, the IVR rule appears in the list with its order, status, customer, and bot details. Use the Up/Down arrows to adjust priority or edit/delete icons to modify or remove rules as needed. With your bot and IVR rules configured, AttendIA on innovaphone is fully set up and ready for testing.