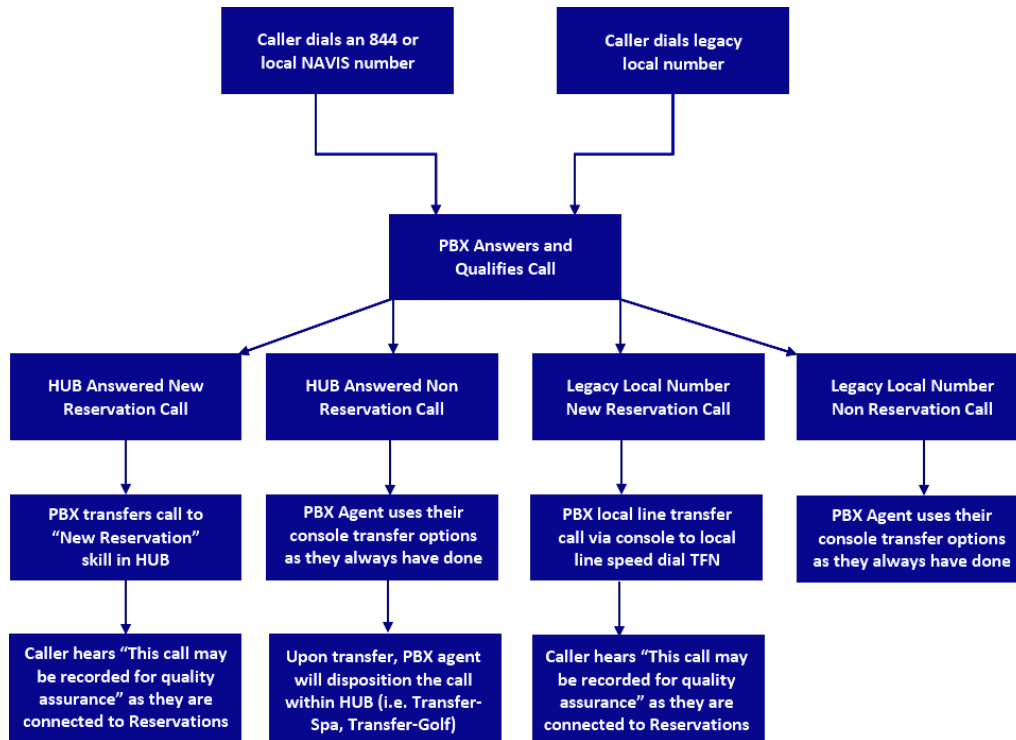


## HUB LIVE Answer Call Flow Configuration

HUB is capable of being configured to work for live answer applications. Live answer could be utilized if you would prefer an operator be in place to field calls, and then transfer to a specific location or skill rather than having an IVR system in place. It is strongly suggested that you work with your Client Success Strategist to determine if this is the best configuration for your business.

### Option A: PBX and Dedicated Reservations Team Model



The following are the requirements for live answer configuration in HUB for a PBX and dedicated reservation team model:

- **Each agent is required to have a unique, dedicated, direct, 10-digit phone number (DID number)**
- PBX Agents and Reservations Agents will log into HUB utilizing the Chrome browser.
- Each REVINATE public-facing, marketing number (REVINATE "844", or REVINATE local number (limited supply) will have a "skill" assigned to it called "PBX" This will be used to set skill priorities as follows:
  - Hold time will be 5 minutes or higher then route to voicemail or another hotel DID not already tried.
- Notifications in Chrome will be set according to [this document](#).
- For the PBX agents, you will need to ensure their HUB is configured properly (Narrowcast>Account Settings>Default HUB Configuration):
  - Uncheck "Auto Pop Lead for Call".

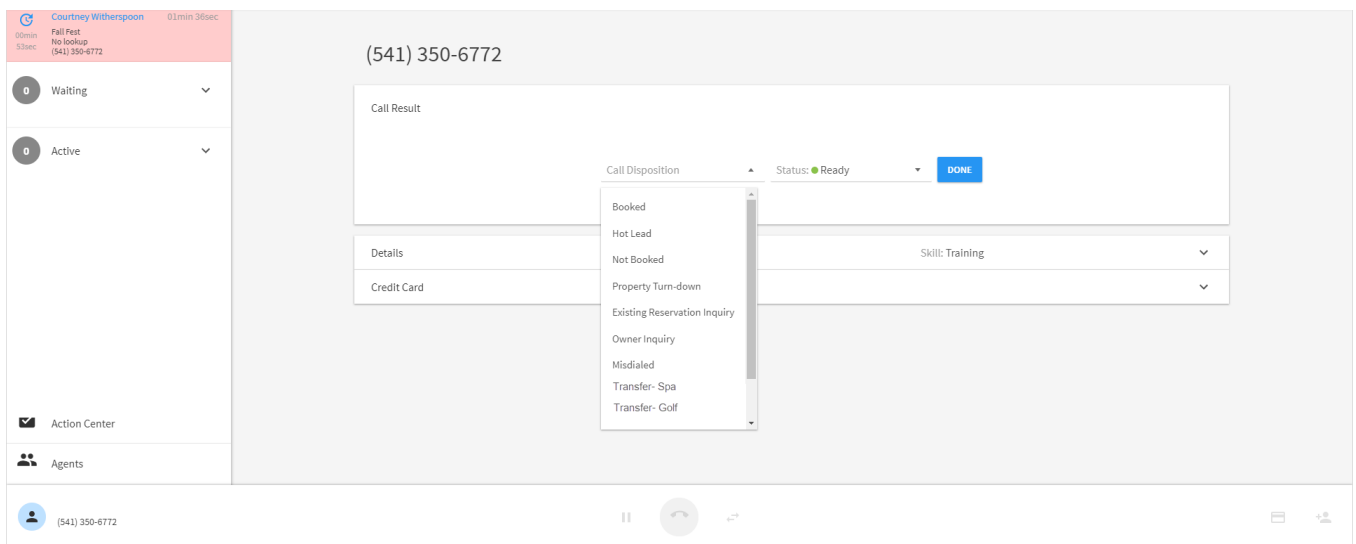
- In the event the PBX agent could potentially make a reservation, the Client Success Strategist or Education Specialist will need to show the PBX agent how to manually pop a lead if applicable.
      - Work with your Client Success Strategist to determine other “Configuration” options.
      - You can [click here](#) for more information on HUB Configuration options.
  - Ensure PBX agent is not “In Agent Call Rotation”. This can be configured under the individual agent profile in Narrowcast under “Account Settings.”
    - When a call comes into HUB, REVINATE will deliver these calls to PBX agents first. The PBX agents will need to manually “Answer Call” in HUB. HUB will then deliver the call directly to their console phones (the same telephony hardware they are using today).

Calls will be answered in the same way they are today, agents will be able to see, in HUB, caller ID information, campaign information, whether it’s a previous caller, existing reservation caller or new caller.

### For Non-Reservation Calls

PBX agents will handle these calls the same way they handle them today. In the event they need to transfer the call internally within the hotel (spa, dining, etc.), agents will use their console transfer options as they always have done.

Upon transfer, PBX Agents will disposition the call within HUB. This will enable REVINATE to report on the types of calls the PBX Agent is getting. This is an important training step since an agent cannot take another call until this step is completed. Please work with your Client Success Manager to determine the best dispositions for your account. For example, do you want to simply disposition all internal transfers as “Transfer” or would you like to identify a “Transfer-Spa” versus “Transfer-Golf” for more granular reporting.



- After the PBX Agents selects the appropriate call result, they will need to choose which status they would like to go into (i.e. Ready, Lunch, Break etc.).
  - Users have the option to turn on “Enable Agent Ready Prompt” on or off. If this feature is turned on, the agent will automatically re-enter the queue in a “Ready” status after selecting the result of their call.
- In the event that all PBX agents are “in call” or another non-ready status, the call will continue to hear ringing until the call is answered or roll to Voicemail or to an alternate DID should they exceed the configured max hold time.

### For New Reservation Inquiries

When a caller requests to make a reservation, or has questions about staying, the PBX agent will transfer to the “New Reservation” skill via HUB. If a PBX agent is “In Call Rotation”, and the call came through outside of HUB, the PBX agent will need to do a local line transfer to a local line speed dial TFN. The call will start to be recorded once it is transferred to the “New Reservation” skill. **NOTE:** For PBX agents that are “In Call Rotation”, most PBX systems will have a way to discern the difference between a HUB call versus a local line call based on destination DID number or lights.

- For example, the last four digits of the local line is 7941 or the last four digits of the TFN destination is 7942.

ID	Total	Caller	Number	Line
1	:10	3104357257	7941	RESERVATIONS

- **NOTE:** Implementation or Solutions Strategist will need to work with clients to identify what type of visualization is available. If visualization is not available for PBX, they will need to refer to HUB to tell whether they are on a HUB call vs. Local Line call.
- **NOTE:** In the event the client has purchased RezForce, you will need to create a “New Reservation” skill as well as an “Existing Reservation” skill. The PBX agent will need to qualify the caller to see if they are calling about a new reservation or an existing reservation. This will help ensure the appropriate calls are sent to RezForce.
- If PBX agents are not “In Call Rotation” (which is the recommended method for this alternative workflow), they will be answering calls manually out of HUB. Therefore, there’s no need to look at the PBX system to discern the type of call coming in because they will be able to easily identify the difference between them in HUB.

- o The only need to identify this in the opposite setup (i.e. PBX agent “In Call Rotation”) is because the calls are automatically delivered in HUB to the PBX agent, not allowing them time to realize the difference before HUB delivers the call to them.

### Roll-Over Flow

- All calls will ring one PBX DID first, based on [smart agent routing rules](#). REVINATE will only ring one DID at a time. We cannot ring multiple DID’s at the same time. Smart Agent Routing is a much more advanced solution.
  - o In the event that the PBX agents are “In Call Rotation”, we will only ring 1 DID at a time and will the most idle DID.
- If all HUB users are not available, REVINATE can either:
  - o Have the calling party hold (set a high hold time, with branded messaging, ringing of phone, and/or music)
  - o Route to a general REVINATE voicemail box.
  - o Route Call to another destination DID number.

### Internal Calls

- REVINATE will not be handling internal guest (in-room) calls to the PBX.
- PBX Agents will handle these calls as they normally do.
- REVINATE HUB will not know that an agent is on an internal call as that call is not routed through the REVINATE environment.
  - o NOTE: Please ensure that PBX agent is not “In Agent Call Rotation”. This can be done under the individual agent profile in Narrowcast under “Account Settings”. This will help cut down probability of the PBX agent getting a HUB call and Local Line call at the same time. The PBX agent will manually answer the calls in HUB.
    - RONA (Roll Over No Answer) – this should be very minimal

OR:

- REVINATE will set a re-queue threshold of 4 rings after trying a DID line that is occupied by a current internal call and send the call to the next available agent.
  - o In the event that there is only 1 PBX agent working, the agent will be placed into an away status, and need to put themselves back into Ready to answer the call in queue
- Understanding how the internal phone system handles “busy” or “occupied lines/extensions” will be helpful. Is there a “call waiting” feature? Is it busy? Does this roll to the front desk?

### Local Line Calls

- REVINATE may not be able to port over a legacy property local number that is held by the local exchange carrier.
- Use of the legacy local number should be minimized/eliminated on all public facing marketing, including your website. REVINATE will provide 844 numbers as well as local numbers that are unique, trackable and reportable.

- There will still be callers who find the legacy local number on lesser used listing websites and printed collateral. This number will route as it always does and agents will handle calls from this number as they do with internal calls.
  - o In the case of new reservation inquiries, PBX agents will local line transfer those calls to a local line speed dial TFN.

### **Caller Experience**

- Caller dials an 844 or local REVINATE number.
- Caller does not experience any prompts (or, we can play a short greeting and recording reminder)
- After 1-3 rings, call is answered by a PBX Agent.
  - o **NOTE:** A Reservation agent or any other Non-PBX user can be skilled to take PBX calls should there not be a PBX agent available at the time
- As soon as an agent is available, the call is delivered. They can also be delivered to a voicemail box or during the hold can elect to go to voicemail.
- If PBX identifies that the caller is inquiring about new reservations or existing reservations, the PBX agent will transfer to the “Reservation” skill (to segment calls by “New” or “Existing” reservations, it’s recommended that the user creates a “New Reservation” and an “Existing Reservation” skill to disseminate calls accordingly).
- At that time, the caller will hear a recording being played “that this call may be recorded for quality assurance purposes” as they are connected to the reservations team.
- We encourage the use of Push2Talk and Push2Chat on your website. In the case of Push2Talk, a guest will request a call and as soon as an agent is available, a call will be placed and the parties connected.

### **Option B: Non-Dedicated PBX and Reservations Team Model**

**The following are the requirements for live answer configuration in HUB for a Non-Dedicated PBX & reservation team model OR for a PBX/Front Desk live answer setup that transfers calls to other back office staff for call type (e.g. Accounting, F&B, Housekeeping, etc.) and/or overflow:**

- **Each agent is required to have a unique, dedicated, direct, 10-digit phone number (DID number)**
- PBX Agents and Reservations Agents will log into HUB utilizing the Chrome browser.
- Each REVINATE public-facing, marketing number (REVINATE “844”, or REVINATE local number (limited supply) will have a “skill” assigned to it called “Reservations.” This will be used to set skill priorities as follows:
  - o PBX Agents= Reservation Skill “Immediate Group A”, the highest skill possible. This ensures the call goes to this group first
  - o Front Desk = Reservation Skill “Immediate Group B”, this ensures calls go to this group second
  - o Concierge/Front Desk Manager/Assistant FD Manager= Reservation Skill “Immediate Group C”

- NOTE: You also have the option to assign one of these groups to a “Timed Delivery” group. Please see [this document](#) for more details on skill proficiency and timed delivery groups.
  - Hold time will be 5 minutes or higher then route to voicemail or another hotel DID not already tried.
- Notifications in Chrome will be set according to [this document](#).
- For the PBX agents, you will need to ensure their HUB is configured properly (Narrowcast>Account Settings>Default HUB Configuration):
  - Uncheck “Auto Pop Lead for Call”.
    - In the event the PBX agent could potentially make a reservation, the Client Success Strategist or Education Specialist will need to show the PBX agent how to manually pop a lead if applicable.
  - Work with your Client Success Strategist to determine other “Configuration” options.
  - You can [click here](#) for more information on HUB Configuration options.
- Ensure PBX agent is not “In Agent Call Rotation”. This can be configured under the individual agent profile in Narrowcast under “Account Settings.”

When a call comes into HUB, REVINATE will deliver these calls to PBX agents first, directly to their console phones (the same telephony hardware they are using today).

Calls will be answered in the same way they are today, agents will be able to see, in HUB, caller ID information, campaign information, whether it’s a previous caller, existing reservation caller or new caller.

- Agents will need to manually select “Answer Call” out of HUB when they are not “In Call Rotation”

### **Call Recordings for reservation performance improvement**

Agents will need to verbally inform the calling party the call is being recorded for quality purposes, alternatively a recording can be played announcing the hotel name and that the call is being recorded.

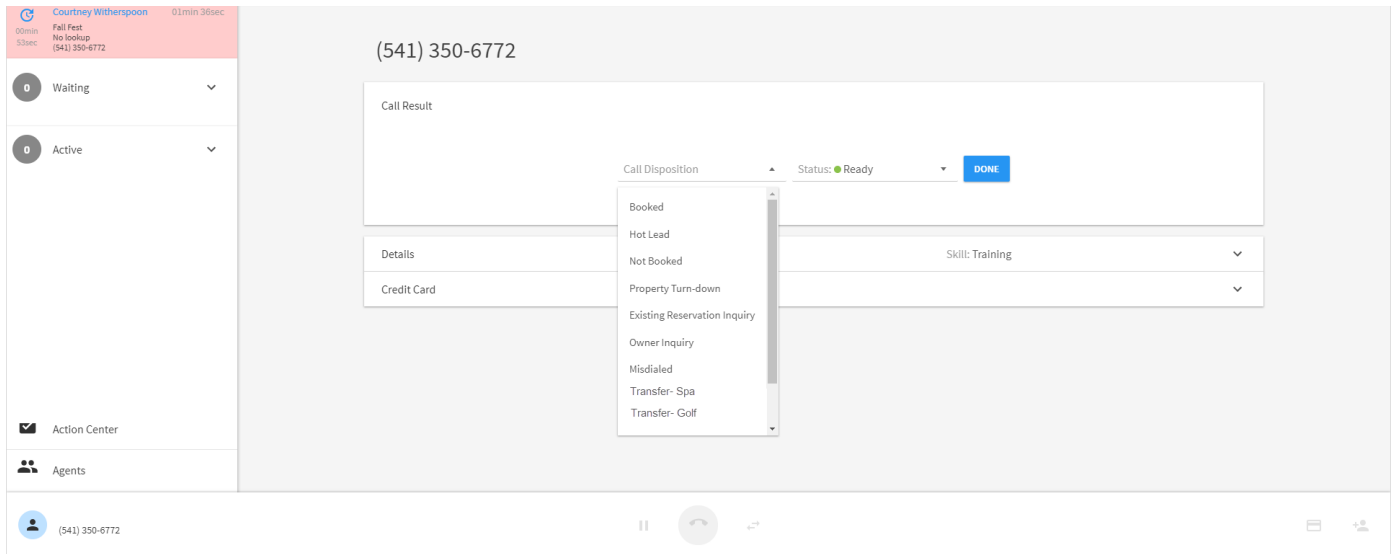
A suggested agent script for this process is:

*“Thank you for calling Hotel Name, on a recorded line, how may I help you?”*

### **For Non-Reservation Calls**

PBX agents will handle these calls the same way they handle them today. In the event they need to transfer the call internally within the hotel (spa, dining, etc.), agents will use their console transfer options as they always have done.

Upon transfer, PBX Agents will disposition the call within HUB. This will enable REVINATE to report on the types of calls the PBX Agent is getting. This is an important training step since an agent cannot take another call until this step is completed. Please work with your Client Success Strategist to determine the best dispositions for your account. For example, do you want to simply disposition all internal transfers as “Transfer” or would you like to identify a “Transfer-Spa” versus “Transfer-Golf” for more granular reporting.



- **NOTE:** If agents do an internal transfer within a HUB transfer option, they will not be able to choose a call result, which can disrupt the ability to track call types transferred from the PBX agents. We advise that PBX agents do not use this transfer feature. However, if the desired result is to disregard PBX agent call type dispositions, and instead intend on measuring the calls dispositions of the transfer team (e.g. Spa, Golf, Skiing, etc.) that is also using HUB, then internal transfers will work as a HUB based transfer method.
- After the PBX Agents selects the appropriate call result, they will need to choose which status they would like to go into (i.e. Ready, Lunch, Break etc.). We can turn off “Agent Ready” prompt if necessary.
- In the event that all PBX agents are “in call” or another non-ready status, calls will automatically roll to the front desk (or any other group the client designates).
  - o Front desk will also be logged into HUB and be in “Ready” Status.
  - o Calls will route to the Front Desk DID number(s) automatically. Front desk will follow the same process as documented above including selecting call results
  - o **NOTE:** In the event that all of the Front Desk Agents are also “in call” or another non- ready status, call will route to the next group in line (i.e. Concierge, Front Desk, etc.)

### For New Reservation Inquiries

When a caller requests to make a reservation or has questions about staying, agent will manually open a lead form. During implementation, REVINATE will train on lead form workflow to capture prospect, revenue management and marketing data.

- **NOTE:** Implementation or Solutions Strategist will need to work with client to identify what type of visualization is available to identify whether they are on a HUB call vs. Local Line Call. If visualization is not available for PBX, they will need to refer to HUB to tell whether they are on a HUB call vs. Local Line call.



- **NOTE:** In the event the client has purchased RezForce, you will need to create a “New Reservation” skill as well as an “Existing Reservation” skill. The PBX agent will need to qualify the caller to see if they are calling about a new reservation or an existing reservation. This will help ensure the appropriate calls are sent to RezForce.
  - o An alternative workflow for this setup is to have the PBX agent transfer calls to a dedicated TFN for RezForce. They can also work with their phone carrier to have calls auto-forward to the dedicated RezForce TFN after a certain number of rings or time. Once the call is sent to this TFN, the 7004 can be activated and provide the caller with options for “New Reservations”, “Existing Reservations”, or “All Other Inquiries”. The Existing Reservations and All Other Inquiries calls are automatically transferred back to the property, and the New Reservations calls are sent to RezForce. This option frees up the PBX agent’s responsibility to qualify a call if they’re too busy to answer the phone.

### Roll-Over Flow

- All calls will ring either the Front Desk or PBX DID first, based on [smart agent routing rules](#). REVINATE will only ring one DID at a time. We cannot ring multiple DID’s at the same time. Smart Agent Routing is a much more advanced solution. Smart agent routing rules don’t matter when either Front Desk or PBX agents are not “In Call Rotation”.
  - o If the PBX agents are not available, REVINATE will ring the front desk DID(s) in the same manner.
  - o A third roll over location can be added at a lower skill priority, such as concierge or a manager’s DID number.
- If all HUB users are not available, REVINATE can either:
  - o Have the calling party hold (set a high hold time, with branded messaging and music)
  - o Route to a general REVINATE voicemail box.
  - o Route Call to another destination DID number or route to RezForce.

### Internal Calls

- REVINATE will not be handling internal guest (in-room) calls to the PBX.
- PBX/Agents/Front Desk will handle these calls as they normally do.
- REVINATE HUB will not know that an agent is on an internal call as that call is not routed through the REVINATE environment.
  - o NOTE: Please ensure that PBX agent is not “In Agent Call Rotation”. This can be done under the individual agent profile in Narrowcast under “Account Settings”. This will help cut down probability of the PBX agent getting a HUB call and Local Line call at the same time. The PBX agent will manually answer the calls in HUB.
    - RONA – this should be very minimal

OR:

- REVINATE will set a re-queue threshold of 4 rings after trying a DID line that is occupied by a current internal call and send the call to the next available agent.

- o In the event that there is only 1 PBX agent working, the agent will be placed into an away status, and need to put themselves back into Ready to answer the call-in queue
- Understanding how the internal phone system handles “busy” or “occupied lines/extensions” will be helpful. Is there a “call waiting” feature? Is it busy? Does this roll to the front desk?

### **Local Line Calls**

- REVINATE cannot port over a legacy property local number that is held by the local exchange carrier.
- Use of the legacy local number should be minimized/eliminated on all public facing marketing, including your website. REVINATE will provide 844 numbers as well as local numbers that are unique, trackable and reportable.
- There will still be callers who find the legacy local number on lesser used listing websites and printed collateral. This number will route as it always does, and agents will handle calls from this number as they do with internal calls.
  - o In the case of new reservation inquiries, PBX agents will local line transfer those calls to a local line speed dial TFN.

### **Caller Experience**

- Caller dials an 844 or local REVINATE number.
- Caller does not experience any prompts (or, we can play a short greeting and recording reminder)
- After 1-3 rings, call is answered by a Front Desk or PBX Agent.
- As soon as an agent is available, the call is delivered. They can also be delivered to a voicemail box or during the hold can elect to go to voicemail.
- We encourage the use of Push2Talk and Push2Chat on your website. In the case of Push2Talk, a guest will request a call and as soon as an agent is available, a call will be placed, and the parties connected.

Note: 7005 plays after skill transfer