

Intelligent Offer Management (IOM),
Version 2.3.1

IOM Tool User Guide

Notice

Intelligent Offer Management (IOM) Version 2.3.1

IOM Tool User Guide

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Chapter 1 Overview to the IOM Tool

This guide details the step-by-step use of the Intelligent Offer Management (IOM) Tool for managing campaign objects and is part of the entire IOM documentation set.

IOM Documentation

Intelligent Offer Management (IOM) is documented in the following books.

Book Title	Audience	Description
<i>IOM Concepts Guide</i>	All readers	<ul style="list-style-type: none">■ Overview concepts for IOM:<ul style="list-style-type: none">□ Theory of general operation□ Components of the IOM system□ Definitions of key terminology■ Tutorials of campaigns from start to finish:<ul style="list-style-type: none">□ Campaign design□ Implementing campaign objects in the IOM Tool□ Voice application design with a sample application■ Release notes for latest version of IOM
<i>IOM Tool User Guide</i>	Campaign administrators	<p>Step-by-step use of the IOM Tool for all tasks:</p> <ul style="list-style-type: none">■ Managing campaign objects■ Importing and exporting applications, campaigns, or offers■ IOM user set-up in C3
<i>IOM Developer and Datafeed Reference</i>	Voice application developers	<p>All details relating to programming IOM-based voice applications and IOM datafeed:</p> <ul style="list-style-type: none">■ Theory of programming, development methodology■ XML-over-HTTP API■ Developing and testing an IOM datafeed, alarms, and service monitors.

Book Title	Audience	Description
<i>IOM Legacy JSP ASP Reference</i>	Developers supporting IOM 1.6 legacy applications	Details related to the pre-IOM-2.3 legacy Java Server Pages Application Programming Interface.

Accessing the IOM Tool

To use the IOM Tool, you must have a valid Nuance Client Command Center (C3) login. Contact your Nuance account manager for a C3 login.

To access the IOM Tool:

On the Client Command Center, from the **Tools** menu, choose **IOM Tool**.



General Workflow with the IOM Tool

The Intelligent Offer Management (IOM) Tool has several purposes:

- To manage all the objects of a campaign: offers with priorities and weights, segments, and promotion files.
- To create and edit segment variables.
- To define and manage the rules used by the IOM Engine that determine how the campaign's objects interact to present offers to a calling subscriber.
- To create and edit voice application slots.

The IOM Tool is used in three general ways: one-time set-up, infrequent tasks, and frequent tasks.

1. **One-time set-up**

- a. One-time set-up of applications with the IOM Tool. Generally, you very infrequently create new applications in the IOM Tool. See “Managing Applications” on page 9.
- b. One-time set-up of slots. In general, slots are created only one time for a particular voice application and do not change frequently. Changes to slots require changes to the voice application. See “Managing Slots” on page 43.

2. Fairly **infrequent tasks**, such as:

- Creating new campaigns.
- Editing offers’ slot, priority, or weight.
- Modifying segments.
- Disabling or re-enabling campaigns.

3. **Frequent tasks**, such as:

- Adding new offers to campaigns.
- Adding or changing promotion audio files.
- Testing offers and putting them into production.

For specific details about these various uses, refer to the table of contents or index.

Using the IOM Tool Tabs

You navigate the IOM Tool with the tabs at the top of the page.



Table 1 IOM Tool Tabs and Functions

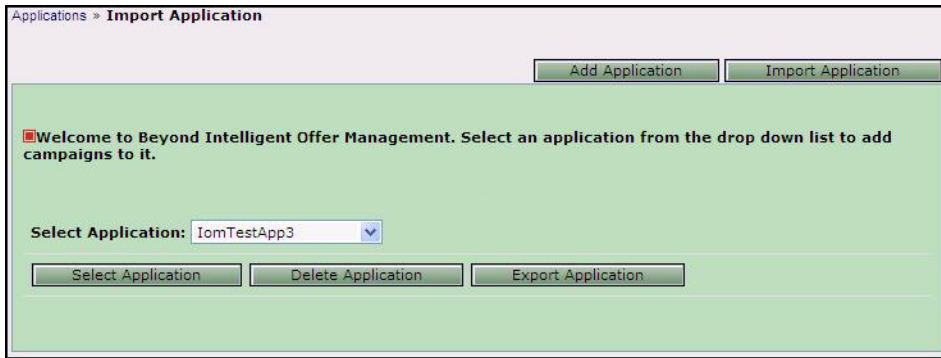
Tab	Function	See also...
Campaigns	Create, edit, delete, and duplicate campaigns. Also, bulk import or export campaigns.	“Managing Campaigns” on page 15

Table 1 IOM Tool Tabs and Functions

Tab	Function	See also...
Offers	Create, edit, delete, and duplicate offers	"Managing Offers" on page 23
Promotions	Create, edit, and delete promotions	"Managing Promotions" on page 27
Segments	Create, edit, delete, and duplicate segments and segment rules	"Managing Segments" on page 31
Variables	Create, edit, and delete segment variables	"Managing Variables" on page 39
Slots	Create, edit, or delete voice application program slots	"Managing Slots" on page 43
Settings	Modify general settings, such as a campaign's supported locales	"Changing General Settings" on page 13

Chapter 2 Managing Applications

All your Intelligent Offer Management (IOM) information is categorized by application. When you first access the IOM Tool, you are presented with a page on which you can create a new application, import or export applications, delete applications, or select an existing application to work with.



Creating an Application

You can create a new application only immediately after you access the IOM Tool after login to C3.

To create a new application:

1. Login to C3.
2. Access the IOM Tool.
3. On the displayed **Applications** page, click **Add Application**.

4. Complete the fields for the new application.

Application » Create Application

Application Name:

Domain: BEVOCAL

Application Description:

Maximum # of promotions allowed per call: Note: Number of prompts offered to subscribers.

Language Support:

☒ English (US)

☐ Spanish (US)

☐ French (Canada)

5. Click **CREATE** to add the new application or **CANCEL** to discard it.

Table 1 Application Fields

Field	Required or Optional?	Description
Name	Required	The name of the application. Allowable characters: Upper- and lowercase letters, numbers, hyphen, space, and period. Maximum length: 30 characters.
Description	Required	Descriptive information about the application. Allowable characters: any. Maximum length: 500 characters.
Maximum # of promotions allowed per call	Required	The number of promotions per call that can be played to a subscriber. Default: 4. A low number, such as 1, means that a subscriber hears only one promotion during the call, regardless of the slots encountered. A high number, such as 3, means the subscriber might hear an offer every encounter in a typical call. Maximum length: 2 characters.

Table 1 Application Fields

Field	Required or Optional?	Description
Locale Support	Required	Which locales does your application support? These are the languages you are prompted for when creating a promotion (see “Creating a Promotion” on page 27). Check the box next to a language to enable that language; clear the checkbox to disable the language. Note: At least one locale is required.

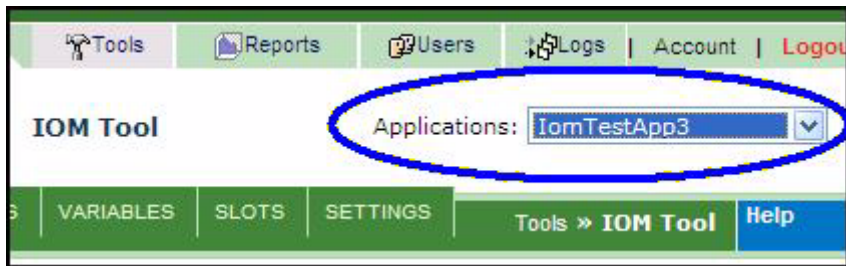
Initially Selecting an Application

Selecting an Application after accessing the IOM Tool:

1. Login to C3.
2. Access the IOM Tool.
3. On the displayed **Applications** page, from the **Select Application** pulldown menu, select the application you want to work on.

Selecting an Application at any time:

At any time while you are using the IOM Tool, in the upper right corner, the pulldown menu labeled **Application** lists the applications you have access to. Use this pulldown menu to switch among available applications.



Deleting an Application

You can delete application only immediately after you access the IOM Tool after login to C3.

To delete an application:

1. Login to C3.
2. Access the IOM Tool.
3. On the displayed **Applications** page, from the **Select Application** pulldown menu, select the application you want to delete.
4. Click **DELETE** to continue or **CANCEL** to discard the deletion.

Importing and Exporting by Application

See Chapter 11.

Chapter 3 Changing General Settings

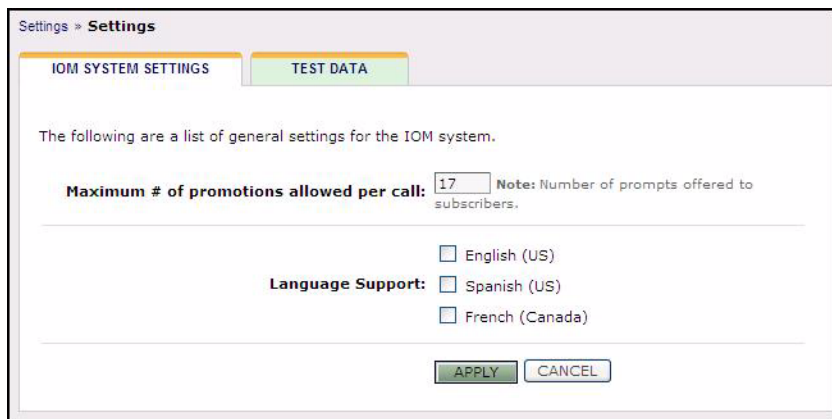
The **Settings** tab displays the IOM Tool's General Settings.



These settings apply to all campaigns you create with IOM.

To change general settings:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Settings** tab.
3. On the **IOM System Settings** subtab, change the desired fields. See Table 1, "General Settings Fields," on page 14.



Settings » Settings

IOM SYSTEM SETTINGS TEST DATA

The following are a list of general settings for the IOM system.

Maximum # of promotions allowed per call: Note: Number of prompts offered to subscribers.

Language Support:

☐ English (US)

☐ Spanish (US)

☐ French (Canada)

4. Click **APPLY** to save the changes, or **CANCEL** to discard them.

Table 1 General Settings Fields

Field	Required or Optional?	Description
Maximum # of promotions allowed per call	Required	The number of promotions per call that can be played to a subscriber. Default: 4. A low number, such as 1, means that a subscriber hears only one promotion during the call, regardless of the slots encountered. A high number, such as 3, means the subscriber might hear an offer every encounter in a typical call. Maximum length: 2 digits (up to 99 promotions).
Locale Support	Required	Which locales does your campaign support? These are the languages you are prompted for when creating a promotion (see “Creating a Promotion” on page 27). Check the box next to a language to enable that language; clear the checkbox to disable the language. Note: At least one locale is required.
Test Numbers	Optional	To test your voice application with IOM, you need to add test telephone numbers. See “Testing Your Offers” on page 47 for details.

Chapter 4 Managing Campaigns

For background information, see the *IOM Concepts Guide* guide.

The **Campaigns** tab lists campaigns that have already been created.

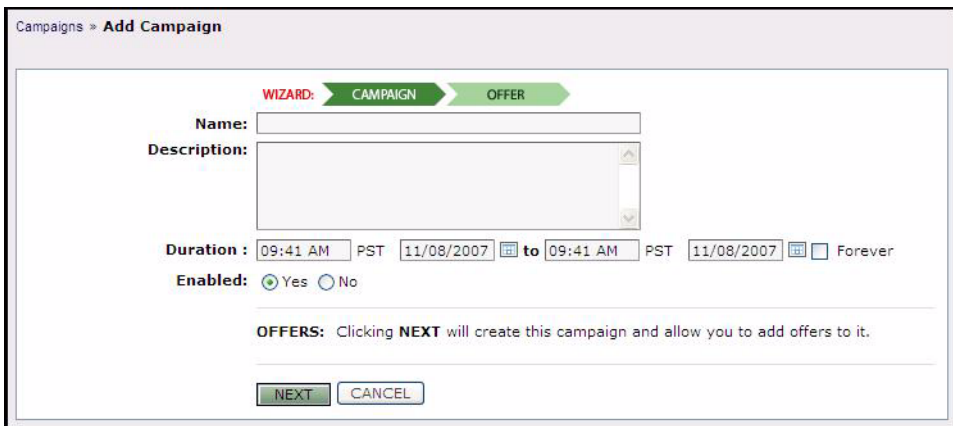


Creating a Campaign

When you create a new campaign, the IOM Tool acts like a “wizard”: it guides you through the steps of creating the campaign details and associating offers with it.

To create a campaign:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click **NEW CAMPAIGN** on the upper right.
3. Complete the fields for the campaign.

The screenshot shows the 'Add Campaign' wizard interface. At the top, it says 'Campaigns » Add Campaign'. Below this is a progress bar with three steps: 'WIZARD' (in red), 'CAMPAIGN' (in green and highlighted), and 'OFFER' (in green). The main form area contains the following fields:

- Name:** A text input field.
- Description:** A large text area with a scroll bar.
- Duration:** A field with two time/date pickers. The first is set to '09:41 AM PST 11/08/2007' and the second to '09:41 AM PST 11/08/2007'. There is a 'Forever' checkbox to the right.
- Enabled:** Radio buttons for 'Yes' (selected) and 'No'.
- OFFERS:** A text area with the instruction: 'Clicking **NEXT** will create this campaign and allow you to add offers to it.'
- At the bottom are two buttons: **NEXT** (highlighted in green) and **CANCEL**.

See Table 1, “Campaign Fields,” on page 16

4. Click **NEXT** to create the campaign and add offers to it, or click **CANCEL** to discard it.

Table 1 Campaign Fields

Field	Required or Optional?	Description
Name	Required	The name of the campaign. Allowable characters: Upper- and lowercase letters, numbers, hyphen, space, and period. Maximum length: 100 characters.
Description	Required	Descriptive information about the campaign. Allowable characters: any. Maximum length: 1,000 characters.
Duration	Required	The date and time in your local timezone that this campaign starts and ends, in the following format: <i>HH:mm</i> [AM PM]. Hours <i>HH</i> : 01 to 12 Minutes <i>mm</i> : 00 to 59 AM or PM If you want the campaign to play indefinitely, check Forever .
Enabled	Required	Click Yes or No to enable or disable the campaign. If the campaign is enabled (default), subscribers begin hearing the campaign as soon as the start time is reached. If the campaign is disabled, the campaign is dormant until it is re-enabled.

5. Click the **Offers** subtab.

The screenshot shows a web interface for adding an offer. At the top, it says 'Campaigns » Add Offer'. Below this, there is a red text prompt: 'Assign offer to campaign: WinterStrike.'. A 'WIZARD:' label is followed by two green arrow buttons labeled 'CAMPAIGN' and 'OFFER'. Below the wizard buttons, there are two radio buttons: 'Select from existing offer.' (which is selected) and 'Add new offer'. The form contains several fields: 'Offer:' with a dropdown menu showing 'aaa'; 'Slot:' with a dropdown menu showing 'testSlot'; 'Priority:' with a dropdown menu showing 'Priority'; 'Weight:' with a text input field containing '60'; 'Frequency:' with a dropdown menu showing 'Every time subscriber calls in'; 'Test Mode:' with an unchecked checkbox labeled 'On'; and 'Enable:' with an unchecked checkbox labeled 'Yes'. At the bottom of the form is a green 'SUBMIT' button.

6. From the **Offer** pulldown, select an offer.
7. From the **Slot** pulldown menu, select a slot.
8. From the **Priority** pulldown menu, select **High**, **Mid**, or **Low**.
9. In the **Weight** text box, enter a value from 1 to 100.
10. From the **Frequency** pulldown menu, select the desired frequency.
11. By default, offers are not test-enabled. If you want to enable testing this offer, click the **On** checkbox next to **Test Mode**.
12. If you want to enable the offer, click the **Yes** checkbox next to **Enable**.
13. Click **SUBMIT** to save your changes.

Adding an Offer to an Existing Campaign

To add an offer to an existing campaign:

1. Click the **Offers** subtab.



Campaigns » Edit Campaign: WinterStrike

CAMPAIGN OFFER

Add Existing Offer

Offer: aaa Slot: testSlot Priority: Priority Weight: 60 Test Mode: ☐ On Enable: ☐ Yes Frequency: Every time subscriber calls in **ADD**

Create New Offer



Note: If you want to add a new offer, on the lower left, click **Create New Offer**. See “Creating an Offer” on page 23.

2. From the **Offer** pulldown, select an existing offer.
3. From the **Slot** pulldown menu, select a slot.
4. From the **Priority** pulldown menu, select **High**, **Mid**, or **Low** (default).
5. In the **Weight** text box, enter a value from 1 to 100. The default is 0.
6. From the **Frequency** pulldown menu, select the desired frequency.
7. By default, offers are not test-enabled. If you want to enable testing this offer, click the **On** checkbox next to **Test Mode**.
8. If you want to enable the offer, click the **Yes** checkbox next to **Enable**.
9. Click **ADD** to add the offer to the campaign.

Editing, Deleting, and Duplicating Campaigns

To edit a campaign:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.

2. You can edit the details of a campaign in two ways:
 - Click the name of a campaign in the Campaign List
 - Click **Edit** on the line for the campaign.
3. Change the desired fields. See Table 1, “Campaign Fields,” on page 16.
4. Click **APPLY** to save the changes or **CANCEL** to discard them.

To delete a campaign:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Decide if you want to delete a single campaign or multiple campaigns:
 - To delete a single campaign, click **Delete** at the far right for the campaign.
 - To delete multiple campaigns:
 - Click the checkbox at the left of the row of each campaign to be deleted, or click the checkbox at the top of the list to select all campaigns.
 - From the pulldown menu below the list, select **Delete**.
 - Click **DO IT**.
3. Click **DELETE** to confirm the deletion or **CANCEL** to cancel it.

To duplicate a campaign:

A duplicate campaign has the same name as its original, but with a suffix of *Duplicate*.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the checkbox at the left of the row of each campaign to duplicate, or click the checkbox at the top of the list to select all campaigns.
3. From the pulldown menu below the list, select **Duplicate**.
4. Click **DO IT**.

Enabling or Disabling a Campaign

By default, when a campaign is created, it is enabled, which means the IOM system acts on it immediately.

To enable or disable a campaign:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. You can edit the details of a campaign in two ways:
 - Click the name of a campaign in the Campaign List
 - Click **Edit** on the line for the campaign.
3. To enable, click the **Enable** checkbox. To disable, make sure the **Enable** checkbox is not checked.
4. Click **APPLY** to save the changes or **CANCEL** to discard them.

Editing an Offer Associated with a Campaign or Deleting It

To edit the parameters of an offer already associated with a campaign:

1. Click the **Campaigns** tab.
2. In the list of campaigns, locate the desired campaign, and click **Edit**.
3. Click the **Offers** subtab.
4. In the list of offers at the bottom of the page, locate the offer you want to change, and click **EDIT** on the right.

Offers within campaign: eb								
Name	Slot	Priority	Weight	Test Mode	Enable	Language Sensitivity	Frequency	Action
dfg	testSlot	Low	60	<input type="checkbox"/>	<input type="checkbox"/>	Yes	Every time subscriber calls in	<div>SUBMIT DELETE</div>



Note: About **Locale Sensitive**: A value of “No” means that the offer supports all locales supported by the application. Otherwise, only certain locales apply.

5. Change any of the offer's parameters you want to modify.
6. Click **SUBMIT** to save your changes or **DELETE** to remove the offer from the campaign. If you click **DELETE**, also click **OK** to confirm the deletion or **Cancel** to not delete the offer.

To remove an offer from a campaign:

1. Click the **Campaigns** tab.
2. In the list of campaigns, locate the desired campaign, and click **Edit**.
3. Click the **Offers** subtab.
4. In the list of offers at the bottom of the page, locate the offer you want to delete, and click **DELETE** on the right.

Offers within campaign: eb								
Name	Slot	Priority	Weight	Test Mode	Enable	Language Sensitivity	Frequency	Action
dfg	testSlot	★	60	Off	No	No	Every time subscriber calls in	<input type="button" value="EDIT"/> <input type="button" value="DELETE"/>

5. Click **OK** to confirm the deletion or **Cancel** to not delete the offer.

Importing and Exporting Campaigns

See Chapter 11.

Chapter 5 Managing Offers

For background information, see the *IOM Concepts Guide* guide.

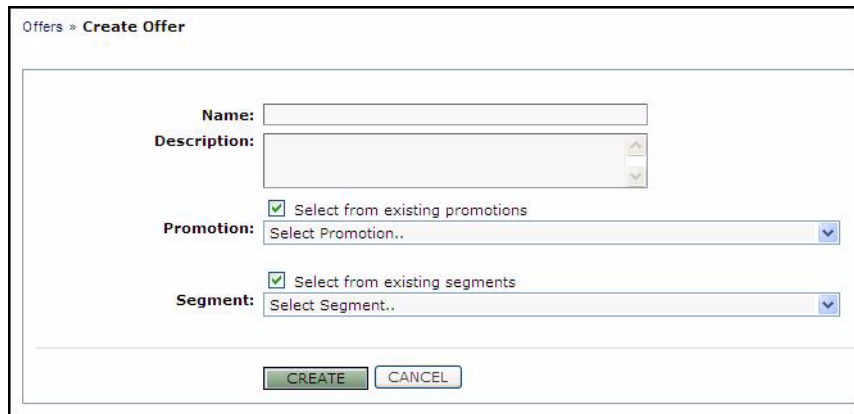
The **Offers** tab lists offers that have already been created.



Creating an Offer

To create an offer:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Offers** tab.
3. Click **NEW OFFER** on the upper right.
4. Complete the fields for the offer.

A screenshot of the 'Create Offer' form. The form has a title bar that says 'Offers » Create Offer'. Below the title bar, there are four main fields: 'Name:' with a text input box, 'Description:' with a larger text area, 'Promotion:' with a dropdown menu, and 'Segment:' with a dropdown menu. Each dropdown menu has a green checkmark icon and the text 'Select from existing [promotions/segments]' above it. Below the dropdowns, there are two buttons: 'CREATE' and 'CANCEL'.

See Table 1, “Offer Fields,” on page 24.

5. Click **CREATE** to save your changes or **CANCEL** to discard them.

Table 1 Offer Fields

Field	Required or Optional?	Description
Name	Required	The name of the offer. Allowable characters: Upper- and lowercase letters, numbers, hyphen, space, and period. Maximum length: 100 characters.
Description	Required	Descriptive information about the offer. Allowable characters: any. Maximum length: 1,000 characters.
Segment	Optional	From the pulldown menu, select the segment to associate with this offer. For details, see “Managing Segments” on page 31.
Promotion	Required	From the pulldown menu, select the promotion to associate with this offer, or to create a new promotion to add to the offer, click Click here . For details, see “Editing and Deleting Promotions” on page 30.

Editing, Deleting, and Duplicating Offers

To edit an offer:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Offers** tab.
3. Either click the name of the offer in the Offer List, or click **Edit** on the line for the offer.
4. Change the desired fields, as described in “Offer Fields” on page 24.
5. Click **UPDATE** to save the changes or **CANCEL** to discard them.

To delete an offer:

You can delete an offer only if it is not associated with any campaigns.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.

2. Click the **Offers** tab.
3. Decide if you want to delete only a single offer or multiple offers.
 - To delete a single offer, at the far right across from the name of the offer, click **Delete**.
 - To delete multiple offers:
 - a. Click the checkbox at the left of each offer to be deleted, or click the checkbox at the top of the list to select all offers.
 - b. From the pulldown menu below the list, select **Delete**.
 - c. Click **DO IT**.
4. Click **DELETE** to confirm the deletion or **CANCEL** to cancel it.

To duplicate an offer:

A duplicate offer has the same name as its original, but with a suffix of Duplicate.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Offers** tab.
3. Click **Duplicate** in the row of the offer you want to duplicate, or click the checkbox at the top of the list to select all offers.
4. From the pulldown menu below the list, select **Duplicate**.
5. Click **DO IT**.

Importing and Exporting Offers

See Chapter 11.

Chapter 6 Managing Promotions

For background information, see the *IOM Concepts Guide* guide.

The **Promotions** tab lists promotions that have already been created.



Creating a Promotion

To create a promotion:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Promotions** tab.
3. Click **NEW PROMOTION** at the upper right.
4. Complete the fields for the promotion, which depend on the type of promotion you select: informational or interactive.

Informational Promotion Fields

Interactive Promotion Fields

The 'Add Promotion' form for an Informational promotion. It includes fields for Name, Description, Product Code, and Type (set to Informational). There are three Prompt fields with 'Browse...' buttons and language dropdowns (en-US, es-US, fr-CA). An 'Allow "barge-in"' checkbox is at the bottom left. 'CREATE' and 'CANCEL' buttons are at the bottom right.The 'Add Promotion' form for an Interactive promotion. It includes fields for Name, Description, and Product Code. The Type is set to Interactive. There are six Prompt buttons: Initial, Help, Error, Accept, Decline, and Grammar File. Below these are three Destination File fields with 'Browse...' buttons and language dropdowns (en-US, es-US, fr-CA). A Timeout dropdown is set to 4 Sec. An 'Allow "barge-in"' checkbox is at the bottom left. 'CREATE' and 'CANCEL' buttons are at the bottom right.

5. Depending on the type of the promotion:
 - Enter the name, description, and product code (if any), and select the type of the promotion.
 - For each prompt field and for each displayed locale, click **Browse** and navigate your local computer to upload the appropriate file.

Even if your campaign supports multiple locales, you can limit the promotion to only a single locale. To limit the promotion to a single locale, upload a prompt file for only the locale you want. Do not upload prompt files for any other locale.



Note: The maximum size of all files included in a promotion must not exceed 100MB; otherwise, the import may fail.

6. Click **CREATE** to save your changes or **CANCEL** to discard them.

Table 1 Promotion Fields

Field	Applies to Promotion Type?	Required or Optional?	Description
Name	Both types	Required	The name of the promotion. Allowable characters: Upper- and lowercase letters, numbers, hyphen, space, and period. Maximum length: 100 characters.
Description	Both types	Required	A description of the promotion. Allowable characters: any. Maximum length: 1,000 characters.
Product Code	Both types	Optional	An identifying code of a product or service associated with this promotion. Allowable characters: any. Maximum length: 100 characters.
Type	Both types	Required	The type of the promotion. Click either Informational or Interactive .
Initial Prompt	Both types	Required	Select the audio file (.wav) subscribers will hear as the offer.
Accept Prompt	Interactive only	Optional	Select the audio file (.wav) subscribers will hear when they have agreed to buy the product or service.

Table 1 Promotion Fields

Field	Applies to Promotion Type?	Required or Optional?	Description
Decline Prompt	Interactive only	Optional	Select the audio file (.wav) subscribers will hear when they have declined buying the product or service.
Error Prompt	Interactive only	Optional	Select the audio file (.wav) subscribers will hear when they have made an invalid response.
Help Prompt	Interactive only	Optional	Select the audio file (.wav) subscribers will hear if they need helpful information about your voice application or other details. Note: You have programmatic control in your grammar file over the subscriber response that will play this prompt; for example, "Help" or "Repeat" or "I don't understand."
Grammar File	Interactive only	Required	Select the grammar file (VoiceXML grammar) to be used to interpret subscriber responses. Grammar files typically have the filename extension .gram, .gso, .ngo, .grammar, or .gsl.
Destination File	Interactive only	Optional	Select the XML file that specifies where subscribers should be transferred in the voice application after their response is interpreted. For details, see the <i>IOM Developer and Datafeed Reference</i> .
Timeout	Interactive only	Optional	Time in seconds between 1 and 4 that the IOM system will wait for a response from the subscriber before replaying the prompt. Default value: 4 seconds. Note: The value entered here is used by the legacy <code>iom_promo.vxml.jsp</code> API. See the <i>IOM Legacy JSP ASP Reference</i> for details.
Allow "barge-in"	Interactive only	Optional	To allow subscribers to interrupt the promotion, click this checkbox. Otherwise, subscribers must listen to the entire promotion.

Editing and Deleting Promotions

To edit a promotion:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Promotions** tab.
3. Either click the name of a promotion or click **Edit** on the line for the promotion.
4. Change the desired fields. See Table 1, “Promotion Fields,” on page 28 for details.

To remove a prompt, grammar file, or destination map, click the **Remove** link next to the prompt.

5. Click **UPDATE** to save your changes or **CANCEL** to discard them.

To delete a promotion:

You can delete a promotion only if it is not associated with an offer.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Promotions** tab.
3. Decide if you want to delete only a single promotion or multiple promotions.
 - ☐ To delete a single promotion, at the far right across from the name of the promotion, click **Delete**.
 - ☐ To delete multiple promotions:
 - a. Click the checkbox at the left of each promotion to be deleted, or click the checkbox at the top of the list to select all promotions.
 - b. From the pulldown menu below the list, select **Delete**.
 - c. Click **DO IT**.
4. Click **DELETE** to confirm the deletion or **CANCEL** to cancel it.

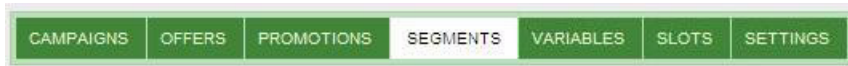
Chapter 7 Managing Segments

For background information, see the *IOM Concepts Guide* guide.



Note: Before working with segments for the first time, be sure to create the segment variables that are the basis of the rules with which you define segments. See “Managing Variables” on page 39.

The **Segments** tab lists segments that have already been created.



Creating an Upsell Segment

To create an upsell segment:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Segments** tab.
3. Click **NEW SEGMENT** on the upper right.
4. For **Type**, click **Upsell**. See Table 1, “Segment Fields,” on page 32.
5. Complete the fields for the segment.

Segments » Add Segment

Name:

Description:

Type: ☐ Fulfill ☒ Upsell

Rules:	Variable Name	Logic	Value #1	Value #2
	Products On Account	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Account Balance	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Days Until Due Date	<input type="text"/>	<input type="text"/>	<input type="text"/>

Under **Rules**, define the segment by selecting a logical operator and entering values for each of the listed variables. See “Upsell Rule Logical Operators” on page 32 and “Examples of Upsell Segment Rule” on page 33.

- Click **CREATE** to save your changes or **CANCEL** to discard them.

Table 1 Segment Fields

Field	Required or Optional?	Description
Name	Required	The name of the segment. Allowable characters: Upper- and lowercase letters, numbers, hyphen, space, and period. Maximum length: 100 characters.
Description	Required	Descriptive information about the segment. Allowable characters: any. Maximum length: 1,000 characters.
Type	Required	Either Upsell or Fulfill .

Upsell Rule Logical Operators

The table below lists the logical operators for defining upsell segments. The operators are grouped by data type: each data type supports only specific operators.



Note: For variables of data type String, on the lefthand side, the value of a variable (which can come from the voice application passing data in the *DemographicInfo* structure, as described in the *IOM Developer and Datafeed Reference*) can be a multi-valued, comma-delimited string. Likewise, the value on the righthand side, which you specify in the IOM Tool, can also be a multi-valued, comma delimited string. No embedded spaces in values are allowed on either side.

Data Type	Operator	Meaning
String	Equals	Subscribers for whom the variable is equal to the string value in Value #1. The order of values does not matter; see the examples below.
	Not Equals	Subscribers for whom the variable is not equal to the string value in Value #1. The order of values does not matter; see the examples below.
	In	Subscribers who have products, markets, or plans contained in the string or strings specified in Value #1.
	Not In	Subscribers who have products, markets, or plans not contained in the string or strings specified in Value #1.

Data Type	Operator	Meaning
Number	Equals	Subscribers for whom the value of the specified variable is exactly equal to Value #1.
	Not Equals	Subscribers for whom the value of the specified variable is not exactly equal to Value #1.
	Between	Subscribers for whom the value of the specified variable is between Value #1 and Value #2, inclusive.
	Not Between	Subscribers for whom the value of the specified variable is not between Value #1 and Value #2, inclusive.
	Greater Than	Subscribers for whom the value of the specified variable is greater than Value #1.
	Less Than	Subscribers for whom the value of the specified variable is less than Value #1.

Examples of Upsell Segment Rule

Segment variables vary from deployment to deployment. In this example, a variable named **Days Until Due Date** has been defined with the **Variables** tab (see “Creating a Variable” on page 39). The segment defined here includes all subscribers whose due date is three days in the future.

Rules:	Variable Name	Type	Logic	Value #1	Value #2
	Days Until Due Date	number	EQUALS	3	
	Account Balance	number	-		
	Products On Account	string	-		
	Market	string	-		
	Rate Plan	string	-		

Here are some exhaustive examples of upsell segment rules for all the types of operators.

String Operators

EQUALS - exact match

ab EQUALS ab evaluates to true.

ab EQUALS bc evaluates to false.

a EQUALS **abc**, **a**, **bc** evaluates to false.
ab, cd EQUALS **ab**, **cd** evaluates to true.
ab, cd EQUALS **cd**, **ab** evaluates to true.
ab, cd, ef EQUALS **cd**, **ab** evaluates to false.
ab, cd EQUALS **ab**, **cd**, **ef** evaluates to false.

NOT EQUALS - exact non-match

ab NOT EQUALS **ab** evaluates to false.
ab NOT EQUALS **bc** evaluates to true.
a NOT EQUALS **abc**, **a**, **bc** evaluates to true.
ab, cd NOT EQUALS **ab**, **cd** evaluates to false.
ab, cd NOT EQUALS **cd**, **ab** evaluates to false.
ab, cd, ef NOT EQUALS **cd**, **ab** evaluates to true.
ab, cd NOT EQUALS **ab**, **cd**, **ef** evaluates to true.

IN - inclusive “contains” matching

ab IN **ab** evaluates to true.
ab IN **ab**, **cd** evaluates to true.
ab IN **cd**, **ab** evaluates to true.
ab IN **bc** evaluates to false.
ab, bc IN **ab** evaluates to true.
ab, cd IN **de** evaluates to false.
ab, bc IN **bc**, **ab** evaluates to true.
ab, bc IN **de**, **ab** evaluates to false.
ab, bc, de IN **de**, **fg**, **hj** evaluates to false.

NOT IN - inclusive “does not contains” matching

ab NOT IN ab evaluates to false.
ab NOT IN ab,cd evaluates to false.
ab NOT IN cd,ab evaluates to false.
ab NOT IN bc evaluates to true.

ab, bc NOT IN ab evaluates to false.
ab, cd NOT IN **de** evaluates to true.
ab, bc NOT IN **bc, ab** evaluates to false.
ab, bc NOT IN **de, ab** evaluates to true.
ab, bc, de NOT IN **de, fg, hj** evaluates to true.

Numeric Operators

GREATER THAN - non-inclusive “greater” than comparison

- 1 GREATER THAN 1 evaluates to false.
- 1 GREATER THAN 2 evaluates to false.
- 2 GREATER THAN 1 evaluates to true.

LESS THAN - non-inclusive “less than” comparison

- 1 LESS THAN 1 evaluates to false.
- 1 LESS THAN 2 evaluates to true.
- 2 LESS THAN 1 evaluates to false.

BETWEEN - inclusive “in between” comparison

- 1 BETWEEN 1 AND 1 evaluates to true.
- 1 BETWEEN 0 AND 1 evaluates to true.
- 1 BETWEEN 0 AND 10 evaluates to true.
- 10 BETWEEN 1 AND 5 evaluates to false.

NOT BETWEEN - inclusive “in between” comparison

- 1 NOT BETWEEN 1 AND 1 evaluates to false.
- 1 NOT BETWEEN 0 AND 1 evaluates to false.
- 1 NOT BETWEEN 0 AND 10 evaluates to false.
- 10 NOT BETWEEN 1 AND 5 evaluates to true.

Creating a Fulfillment Segment



Note: When you create a fulfillment segment with the IOM Tool, be sure that arrangements have been made to transfer the segment file to Nuance, and that programs have been written to process the segment file. For details on the segment file format, see the *IOM Developer and Datafeed Reference*.

To create a fulfillment segment:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Segments** tab.
3. Click **NEW SEGMENT** on the upper right.
4. For **Type**, click **Fulfill**. See Table 1, "Segment Fields," on page 32.
5. Complete the fields for the segment.

Segments » Add Segment

Name:

Description:

Type: ☐ Upsell ☒ Fulfill

Segment File:

6. For **Segment File**, enter the name of the file (without filename extension) that is loaded into the IOM database by an IOM datafeed. For example, if the file that is fed to IOM is named as follows:

abc.txt

You should enter only `abc` without the `.txt` extension.

If you are unsure, check with your IOM datafeed developer.

7. Click **CREATE** to save your changes or **CANCEL** to discard them.

Editing, Deleting, and Duplicating Segments

To edit a segment:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Segments** tab.
3. Click the name of the segment you want to edit.
4. Change the desired fields. See Table 1, “Segment Fields,” on page 32
5. Click **UPDATE** to save the changes or **CANCEL** to discard them.

To delete a segment:

You can delete a segment only if it is not associated with offers.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Segments** tab.
3. Click the checkbox on the right end of the row of each segment to be deleted. Click the checkbox at the top of the list to select all segments.
4. From the pulldown menu below the list, select **Delete**.
5. Click **DO IT**.
6. Click **DELETE** to confirm the deletion or **CANCEL** to cancel it.

To duplicate a segment:

A duplicate segment has the same name as its original, but with a suffix of *Duplicate*.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Segments** tab.
3. Click the checkbox on the right end of the row of each segment to be duplicated, or click the checkbox at the top of the list to select all segments.
4. From the pulldown menu below the list, select **Duplicate**.

5. Click **DO IT**.

Chapter 8 Managing Variables

For background information, see the *IOM Concepts Guide* guide.

The **Variables** tab lists variables that have already been created.



Creating a Variable

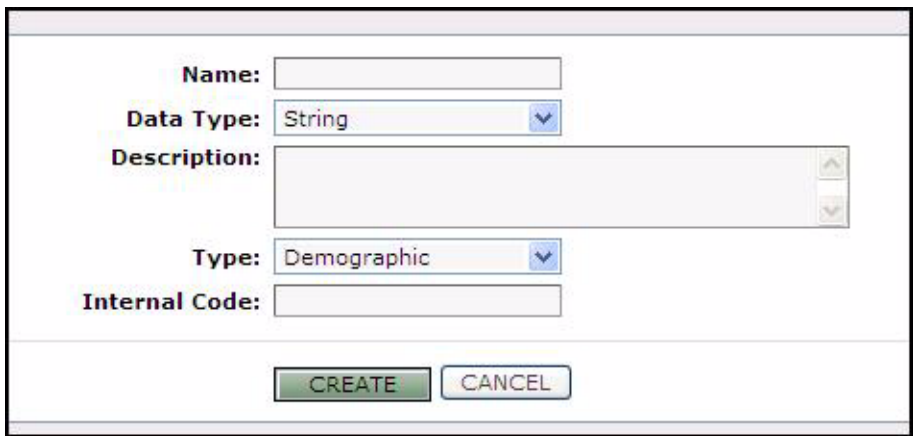


Note: The precise names of variables you create with the IOM Tool the *must* match the keys used by your voice application's DemographicInfoItem. See *IOM Developer and Datafeed Reference*.

If you are unsure, check with your voice application developer.

To create a variable:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Variables** tab.
3. Click **NEW VARIABLE** on the upper right.
4. Enter the fields for the variable.



See Table 1, "Variable Fields," on page 40.

5. Click **CREATE** to save the changes or **CANCEL** to discard them.

Table 1 Variable Fields

Field	Required or Optional?	Description
Name	Required	The name of the variable. See note on page 39. Allowable characters: Upper- and lowercase letters, numbers, hyphen, space, and period. Maximum length: 100 characters.
Data Type	Required	The data type of the variable: <ul style="list-style-type: none">■ String■ Date■ Number
Description	Required	Descriptive information about the variable. Allowable characters: any. Maximum length: 1,000 characters.
Type	Required	The type of the variable. From the pulldown menu, select: one of the following <ul style="list-style-type: none">■ Demographic■ Usage
Internal Code	Optional	This field has a unique purpose for each customer. If the variable is a Demographic type, the Internal Code field must be the name of the key the IOM engine will use to get the value of the variable with the <code>getDemographicInfoItem()</code> call in the <code>DemographicInfo</code> interface definition (see the <i>IOM Developer and Datafeed Reference</i>). Maximum length: 100 characters.

Editing and Deleting Variables

To edit a variable:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Variables** tab.
3. You can edit a variable in two ways:
 - Click the name of a variable in the Variable List.

- Click **Edit** on the line for the segment.
- 4. Change the desired fields. See Table 1, “Variable Fields,” on page 40.
- 5. Click **UPDATE** to save your changes or **CANCEL** to discard them.

To delete a variable:

You can delete a variable only if it is not in use in any segment rule.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Variables** tab.
3. Click the checkbox at the left of the row of each variable to be deleted, or click the checkbox at the top of the list to select all segments.
4. From the pulldown menu below the list, select **DELETE**.
5. Click **DO IT**.
6. Click **DELETE** to confirm the deletion or **CANCEL** to cancel it.

Chapter 9 Managing Slots

For background information, see the *IOM Concepts Guide* guide.

The **Slots** tab lists slots that have already been created.



Creating a Slot



Note: The names of slots are used directly in voice applications. See the *IOM Developer and Datafeed Reference*.

To create a slot:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Slots** tab.
3. Click **NEW SLOT** on the upper right.
4. Complete the fields for the slot.



See Table 1, “Slot Fields,” on page 44.

5. Click **CREATE** to save your changes or **CANCEL** to discard them.

Table 1 Slot Fields

Field	Required or Optional?	Description
Name	Required	The name of the slot. Allowable characters: Upper- and lowercase letters, numbers, hyphen, space, and period. Maximum length: 100 characters.
Description	Required	Descriptive information about the slot. Allowable characters: any. Maximum length: 1,000 characters.

Editing and Deleting Slots

To edit a slot:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Slots** tab.
3. You can edit a slot in two ways:
 - Click the name of a slot in the Slot List
 - Click **Edit** at the right on the line for the slot.
4. Change the desired fields. See Table 1, "Slot Fields," on page 44.
5. Click **UPDATE** to save your changes or **CANCEL** to discard them.

To delete a slot:

You can delete a slot only if it is not associated with an offer.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Slots** tab.
3. Decide if you want to delete only a single slot or multiple slots.
 - To delete a single slot, at the far right across from the name of the slot, click **Delete**.
 - To delete multiple slots:

- Click the checkbox at the left of each slot to be deleted, or click the checkbox at the top of the list to select all slots.
 - From the pulldown menu below the list, select **Delete**.
 - At the bottom left of the page, click **DO IT**.
4. Click **DELETE** to confirm the deletion or **CANCEL** to cancel it.

Chapter 10 Testing Your Offers

Setting up voice application testing with the IOM tool involves:

- Enabling an offer for testing
- Adding the appropriate test telephone numbers
- Specifying rules for the segment variables you want to test against. See “Creating an Upsell Segment” on page 31 for details about segment rules.

To enable testing for an offer:

By default, when you add an offer to a campaign, it is test-enabled.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Campaign** tab.
3. In the list of campaigns, click **Edit** for the campaign whose offers you want to test-enable.
4. Click the **Offers** subtab.
5. At the bottom of the displayed page, for each offer you want to test, click **Edit**.

OFFER

Add Existing Offer

Offer: null Slot: test Priority: Priority Weight: 60 Test Mode: ☐ On ☐ Yes Enable: ☐ Yes Frequency: Every time subscriber calls in **ADD**

Create New Offer

Offers within campaign: WinterStrike

Name	Slot	Priority	Weight	Test Mode	Enable	Language Sensitivity	Frequency	Action
aaa	testSlot	★	60	Off	No	No	Every time subscriber calls in	EDIT DELETE
ddd	testSlot	★	60	Off	No	No	Every time subscriber calls in	EDIT DELETE

- Click the **Test Mode** checkbox.

Offers within campaign: WinterStrike

Name	Slot	Priority	Weight	Test Mode	Enable	Language Sensitivity	Frequency	Action
aaa	testSlot	Low	60	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Yes	Every time subscriber calls in	
				<input type="button" value="SUBMIT"/> <input type="button" value="DELETE"/>				
ddd	testSlot	★	60	Off	No	No	Every time subscriber calls in	<input type="button" value="EDIT"/> <input type="button" value="DELETE"/>

- Click **SUBMIT** to save your changes or **DELETE** to delete the offer from the campaign.

Adding Test Numbers

You need to record the telephone numbers you use for testing. These telephone numbers must have been associated with a URL that invokes the IOM-based voice application you want to test. Also, you need define the upsell segment rules associated with the test telephone number.

To add a test a telephone number and test segment rules:

- At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
- Click the **Settings** tab.
- Click the **Test Data** subtab.

Settings » Settings

IOM SYSTEM SETTINGS TEST DATA

Add Test Number And Data

<input type="checkbox"/>	Test Numbers	Supported Variables	Action

- To add a number and define upsell segment rules to test, click **Add Test Number and Data**.

5. On the displayed page, enter the test telephone number and define the test segment rules by specifying the values of the segment variables you want to test. For information about upsell segment rules, see “Creating an Upsell Segment” on page 31.

Settings » Add Test Number and Data

Test Number:

Variables:

Variable Name	Type	Value	Duration
IomTestDemographicVariable	String	<input type="text" value="45"/>	
IomTestDemographicVariable1	String	<input type="text" value="20"/>	

6. To add the test number and rules, click **CREATE**, or click **GO BACK** to start over.

Editing Test Segment Rules

To edit segment rules associated with an existing test number:



Note: You cannot change a test number once it is created. You can only change the segment rules associated with it.

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Settings** tab.
3. Click the **Test Data** subtab.
4. For the test number whose segment variable values you wish to change, on the right click the associated **Edit** button.
5. Change the values of any of the desired segment variables.
6. Click **UPDATE** to save your changes, or click **GO BACK** to start over.

Deleting Test Numbers And Associated Rules

To delete a test number:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Settings** tab.
3. Click the **Test Data** subtab.
4. For the test number you want to delete, on the right click the associated **Delete** button.

Chapter 11 Importing and Exporting Data

To allow you to move your campaign objects from one IOM system to another, use the IOM Tool to import or export your IOM data by application, by campaign, or by offer.

File Naming Conventions and Import Behavior

On export, data are stored in a zipfile. IOM uses following file naming conventions, *applicationName* is the name of the application in effect at the time of the export:

Application	<i>applicationName_</i> Application Data.zip
Campaign	<i>applicationName_</i> Campaign Data.zip
Offer	<i>applicationName_</i> Offer Data.zip

On import, IOM follows these rules for creating and naming campaign objects.

Applications, campaigns, and offers:

- If the name of an application being imported already exists in IOM, the imported application is renamed:

originalAppName_1

Campaigns, and offers:

- If the name of a campaign or offer being imported already exists in IOM, the imported campaign or offer is renamed. For example, if *originalCampaignOrOfferName* already exists, the imported object's name becomes:

originalCampaignOrOfferName Imported_1

- If *originalCampaignOrOfferName* is imported again, it is renamed:

originalCampaignOrOfferName Imported_2

- If *originalCampaignOrOfferName* Imported_1 is reimported, its name becomes:
`originalCampaignOrOfferName Imported_1 Imported_1`
 and so on, for as many times as the object is reimported.

Segments, variables, and promotions:

On import, IOM compares the attributes of segments, variables, promotions and the MD5 checksum of prompt files associated with promotions to determine if the contents of the objects being imported are the same as objects already existing in IOM.

- If the name of a segment, variable, or promotion being imported already exists in IOM, *and the contents of the two are the same*, the object being imported is *not* recreated.
- Otherwise, if the names are the same *but the contents of the objects are different*, the imported object is renamed:
`originalName Imported_1`
- If *originalName* Imported_1 is reimported and the contents are different, it is once again renamed:
`originalName Imported_1 Imported_1`
 and so on, for as many times as the object is reimported with different contents but the same name.

Maximum File Size on Import

The maximum size of all files included in an import operation must not exceed 100MB; otherwise, the import may fail.

Importing and Exporting Applications

To import an application:

1. Login to C3.
2. Access the IOM Tool.
3. On the displayed **Applications** page, click **Import Application**.

4. Click **Browse**.
5. Navigate your local computer to find the zipfile of an exported application.
6. Double-click the file name, or select the file and click **OK**.
7. Click **IMPORT**.

To export an application:

1. Login to C3.
2. Access the IOM Tool.
3. On the displayed **Applications** page, from the **Select Application** pulldown menu, select the application you want to export.
4. Click **Export Application**.
5. Select a location on your local computer to store the export file.
6. Click **Save**.

Importing and Exporting Campaigns

To import a campaign:

1. Click the **Campaigns** tab.
2. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
3. At the bottom of the page, click **IMPORT CAMPAIGN**.
4. Click **Browse**.
5. Navigate your local computer to find the zipfile of an exported campaign.
6. Double-click the file name, or select the file and click **OK**.
7. Click **IMPORT**.

To export all campaigns:

1. Click the **Campaigns** tab.
2. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.

3. At the bottom of the page, click **EXPORT ALL CAMPAIGNS**.
4. Choose a location on your local computer to store the export file.
5. Click **Save**.

Importing and Exporting Offers

To import a offer:

1. Click the **Offers** tab.
2. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
3. At the bottom of the page, click **IMPORT OFFER**.
4. Click **Browse**.
5. Navigate your local computer to find the zipfile of an exported offer.
6. Double-click the file name, or select the file and click **OK**.
7. Click **IMPORT**.
8. Click **Save**.

To export an offer:

1. At the upper right, from the **Application** pulldown menu, make sure you have selected the name of the appropriate application.
2. Click the **Offers** tab.
3. On the displayed list, click the checkbox to the left of the names of all offers you want to export.
4. At the bottom of the page, from the pulldown menu, select **Export**.
5. Click **DO IT**.
6. Navigate your local computer to find a location suitable to store the export file.
7. Click **Save**.

Appendix A IOM Tool Administration Set-up

This section describes various Intelligent Offer Management (IOM) administrative tasks. Voice application developers usually do not need to know these details.

- Granting IOM Tool Permission
- Creating Roles
- Creating Users

These tasks rely on the C3 Role Manager tool.

Granting IOM Tool Permission

The Intelligent Offer Management (IOM) has only a single permission: “Can use IOM Tool”

You can assign this permission to roles with the Role Manager in C3:

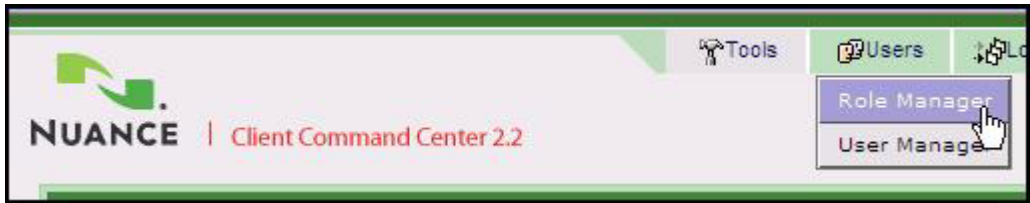
For security, each Client Command Center user is assigned a specific role, which defines what that user can do. For each role, you define which tools and reports a user can access. For more information about roles, see “Creating Roles” on page 55.

After roles are defined, each user is assigned a specific role based on what access they need to specific tools and reports. If necessary, new roles can be created to match a user’s needs. For more information on assigning roles to users, see “Creating Users” on page 58.

Creating Roles

To create a role, select **Role Manager** from the **Users** menu.

Figure 1 Role Manager in User menu



The Manage Roles page is displayed.

Figure 2 Role Manager

Manage Roles: BEVOCAL

A Role defines a set of Permissions that can be associated with a User or a Key. Use this tool to work with Roles.

Group: BEVOCAL [v] [Select]

Roles	Edit	Clone	
[icon] james_clone	Edit	Clone	<input type="checkbox"/>
[icon] kasi	Edit	Clone	<input type="checkbox"/>
[icon] 1ncd	Edit	Clone	<input type="checkbox"/>
[icon] kasi	Edit	Clone	<input type="checkbox"/>
[icon] Worker	Edit	Clone	<input type="checkbox"/>

To create a role:

1. For **Group**, select the desired group, and then click **Select**. The roles for the selected group are displayed.
2. Click **Add Role...** at the bottom of the list of roles. The Add Role page is displayed.

Figure 3 Add Role page

NUANCE | Client Command Center 2.2

Add Role: BEVOCAL

Clone Role

Edit the following role properties.

Role Name:

Create Role Cancel

3. Enter a name for the role.

4. Click on **Create Role**.

The Edit Role page for the newly created role is displayed.

Figure 4 Edit Role pages

Manage Role: BEVOCAL (IOMRole)

The Client Command Center restricts access by assigning Roles and Permissions to users. The section allows you to manage Users, Roles, and Permissions.

Role Name:

Call Routing	<input type="checkbox"/>
Can View Call Routes	<input type="checkbox"/>
Can Edit Call Routes	<input type="checkbox"/>
URL Manager	<input type="checkbox"/>
Can use the URL Manager	<input type="checkbox"/>
Can edit the DID/URL mappings	<input type="checkbox"/>
BODCS Manager	<input type="checkbox"/>
Can use BODCSManager	<input type="checkbox"/>
Can use the Admin Page	<input type="checkbox"/>
AppConfig	
Can use App Config tool	<input type="checkbox"/>
IOM Tool	
Can view IOM Tool	<input checked="" type="checkbox"/>
Can edit IOM Settings	<input checked="" type="checkbox"/>

5. Assign the access rights that you want for this role. Click the checkbox for each access right to toggle it from unchecked to checked.

6. Click **Update** to save your changes.

Creating Users

To create a user, select **User Manager** from the **Users** menu.

Figure 5 User Manager in User menu



The Manage Users page is displayed.

Figure 6 Manage Users page

Manage Users: BEVOCAL				
The Client Command Center restricts access by assigning Roles and Permissions to users. The section allows you to manage Users, Roles, and Permissions.				
Group <input type="text" value="BEVOCAL"/> <input type="button" value="Select"/>				
Username	First	Last	Role	User Info
<input type="checkbox"/> abctest1	sam	sdf	administrator	E-mail:dfdsg@hkdshf.kjk Phone:3333
<input type="checkbox"/> AgentManager			Administrator	
<input type="checkbox"/> aaa1	aaa	ccc	james_clone	E-mail:aaa.bbb@valuelabs Phone:1234
<input type="checkbox"/> aaa2	aaa	ddd	james_clone	E-mail:aaa.bbb@valuelabs Phone:1223443 Mobile:343556
<input type="checkbox"/> aaaaaa	aa	ss	james_clone	E-mail:a.b@ab.com Phone:1212

To create a user:

1. For **Group**, select the desired group, and then click **Select**. The users for the selected group are displayed.
2. Click **Add User...** at the bottom of the list of users. The Add User page is displayed.

Figure 7 Add User page

Add User: BEVOCAL

Add a new **user** to the system. Select a **role** name to determine the users

Add User

* Indicates Required Fields

* **Username:** Joseph Doe

Domain: BEVOCAL

* **Password:**

* **Confirm Password:**

First Name:

Last Name:

E-mail:

Phone:

Mobile:

* **Role:** IOMRole

Enabled: ☒ Yes ☐ No

Expiration:

3. Enter the requested information for the new user.
For **Role**, select one of the valid roles defined in the Role Manager.
For **Expiration**, enter the date you want the user to expire. If you leave this field blank, the user will not expire.
4. Click **Add User**.

Appendix B Import/Export Schema

Intelligent Offer Management (IOM) import and export files conform to this X-Schema definition.

```
<?xml version="1.0" encoding="UTF-8"?>
<schema xmlns="http://www.w3.org/2001/XMLSchema"
  xmlns:iom="http://www.bevocal.com/iom"
  targetNamespace="http://www.bevocal.com/iom">
  <annotation>
    <documentation>This describes the schema for the import/export of
Application Data.
                                Author: Kavita Gaitonde
    </documentation>
  </annotation>
  <element name="applicationData" type="iom:ApplicationDataInfo"/>
  <complexType name="ApplicationDataInfo">
    <sequence>
      <element name="app" type="iom:Application"/>
      <element name="campaigns" type="iom:CampaignList" minOccurs="0"/>
      <element name="offers" type="iom:OfferList" minOccurs="0"/>
    </sequence>
  </complexType>

  <!-- Application Information -->
  <complexType name="Application">
    <sequence>
      <element name="appName" type="string"/>
      <element name="description" type="string"/>
      <element name="domain" type="string"/>
      <element name="maxPromoAllowed" type="int"/>
      <element name="lastModifiedAuthor" type="string"/>
      <element name="supportedLocales" type="iom:SupportedLocaleList"
minOccurs="1"/>
      <element name="slots" type="iom:SlotList" minOccurs="1"/>
      <element name="variables" type="iom:VariableList" minOccurs="1"/>
      <element name="campaigns" type="iom:CampaignList" minOccurs="1"/>
      <element name="segments" type="iom:SegmentList" minOccurs="1"/>
      <element name="rules" type="iom:RuleList" minOccurs="1"/>
      <element name="voicePromotions" type="iom:VoicePromotionList"
minOccurs="1"/>
      <element name="offers" type="iom:OfferList" minOccurs="1"/>
      <element name="campaignOffers" type="iom:CampaignOfferList"
minOccurs="1"/>
      <element name="durations" type="iom:DurationList" minOccurs="1"/>
      <element name="testModeMins" type="iom:TestModeMinList"
minOccurs="1"/>
    </sequence>
  </complexType>
  <!-- End Application Information -->

  <!-- SupportedLocaleList Information -->
  <complexType name="SupportedLocaleList">
    <sequence>
      <element name="supportedLocale" type="iom:SupportedLocaleInfo"
minOccurs="0" maxOccurs="unbounded"/>
    </sequence>
  </complexType>
  <!-- End SupportedLocaleList Information -->

  <!-- SupportedLocaleInfo Information -->
  <complexType name="SupportedLocaleInfo">
```

```

        <sequence>
            <element name="locale" type="string"/>
            <element name="appName" type="string"/>
        </sequence>
    </complexType>
<!-- End SupportedLocaleInfo Information -->

<!-- Locale Information -->
<!-- <complexType name="Locale">
    <sequence>
        <element name="locale" type="string"/>
        <element name="description" type="string"/>
    </sequence>
</complexType>
-->
<!-- End Locale Information -->

<!-- SlotList Information -->
<complexType name="SlotList">
    <sequence>
        <element name="slot" type="iom:SlotInfo" minOccurs="0"
maxOccurs="unbounded"/>
    </sequence>
</complexType>
<!-- End SlotList Information -->

<!-- SlotInfo Information -->
<complexType name="SlotInfo">
    <sequence>
        <element name="slotName" type="string"/>
        <element name="description" type="string"/>
        <element name="lastModifiedAuthor" type="string"/>
        <element name="appName" type="string"/>
    </sequence>
</complexType>
<!-- End SlotInfo Information -->

<!-- VariableList Information -->
<complexType name="VariableList">
    <sequence>
        <element name="variable" type="iom:VariableInfo" minOccurs="0"
maxOccurs="unbounded"/>
    </sequence>
</complexType>
<!-- End VariableList Information -->

<!-- VariableInfo Information -->
<complexType name="VariableInfo">
    <sequence>
        <element name="variableName" type="string"/>
        <element name="variableType" type="string"/>
        <element name="variableDataType" type="string"/>
        <element name="description" type="string"/>
        <element name="internalCode" type="string" minOccurs="0"
maxOccurs="1"/>
        <element name="hidden" type="string"/>
        <element name="lastModifiedAuthor" type="string"/>
        <element name="appName" type="string"/>
    </sequence>
</complexType>
<!-- End VariableInfo Information -->

<!-- CampaignList Information -->
<complexType name="CampaignList">
    <sequence>

```

```

        <element name="campaign" type="iom:CampaignInfo" minOccurs="0"
maxOccurs="unbounded"/>
    </sequence>
</complexType>
<!-- End CampaignList Information -->

<!-- CampaignInfo Information -->
<complexType name="CampaignInfo">
    <sequence>
        <element name="campaignName" type="string"/>
        <element name="description" type="string"/>
        <element name="disabled" type="string"/>
        <element name="startDate" type="date"/>
        <element name="endDate" type="date"/>
        <element name="lastModifiedAuthor" type="string"/>
        <element name="appName" type="string"/>
    </sequence>
</complexType>
<!-- End CampaignInfo Information -->

<!-- SegmentList Information -->
<complexType name="SegmentList">
    <sequence>
        <element name="segment" type="iom:SegmentInfo" minOccurs="0"
maxOccurs="unbounded"/>
    </sequence>
</complexType>
<!-- End SegmentList Information -->

<!-- SegmentInfo Information -->
<complexType name="SegmentInfo">
    <sequence>
        <element name="segmentName" type="string"/>
        <element name="description" type="string"/>
        <element name="isUpSell" type="string"/>
        <element name="lastModifiedAuthor" type="string"/>
        <element name="appName" type="string"/>
    </sequence>
</complexType>
<!-- End SegmentInfo Information -->

<!-- RuleList Information -->
<complexType name="RuleList">
    <sequence>
        <element name="rule" type="iom:RuleInfo" minOccurs="0"
maxOccurs="unbounded"/>
    </sequence>
</complexType>
<!-- End RuleList Information -->

<!-- RuleInfo Information -->
<complexType name="RuleInfo">
    <sequence>
        <element name="ruleName" type="string"/>
        <element name="description" type="string"/>
        <element name="ruleType" type="string"/>
        <element name="operator" type="byte"/>
        <element name="primaryArgument" type="string"/>
        <element name="secondaryArgument" type="string" minOccurs="0"
maxOccurs="1"/>
        <element name="lastModifiedAuthor" type="string"/>
        <element name="durationTime" type="long" minOccurs="0"
maxOccurs="1"/>
        <element name="durationUnit" type="string" minOccurs="0"
maxOccurs="1"/>
        <element name="segmentName" type="string" minOccurs="1"/>
        <element name="variableName" type="string"/>
    </sequence>

```

```

        <element name="appName" type="string"/>
    </sequence>
</complexType>
<!-- End RuleInfo Information -->

<!-- VoicePromotionList Information -->
<complexType name="VoicePromotionList">
    <sequence>
        <element name="voicePromotion" type="iom:VoicePromotionInfo"
minOccurs="0" maxOccurs="unbounded"/>
    </sequence>
</complexType>
<!-- End VoicePromotionList Information -->

<!-- VoicePromotionInfo Information -->
<complexType name="VoicePromotionInfo">
    <sequence>
        <element name="promotionName" type="string"/>
        <element name="description" type="string"/>
        <element name="type" type="string"/>
        <element name="productCode" type="string" minOccurs="0"
maxOccurs="1"/>
        <element name="lastModifiedAuthor" type="string"/>
        <element name="appName" type="string"/>
        <element name="timeout" type="int"/>
        <element name="promoType" type="string"/>
        <element name="bargainable" type="string"/>
        <element name="contents" type="iom:ContentList" minOccurs="1"
maxOccurs="1"/>
    </sequence>
</complexType>
<!-- End VoicePromotionInfo Information -->

<!-- ContentList Information -->
<complexType name="ContentList">
    <sequence>
        <element name="content" type="iom:ContentInfo" minOccurs="1"
maxOccurs="unbounded"/>
    </sequence>
</complexType>
<!-- End ContentList Information -->

<!-- ContentInfo Information -->
<complexType name="ContentInfo">
    <sequence>
        <element name="name" type="string"/>
        <element name="tts" type="string" minOccurs="0" maxOccurs="1"/>
        <element name="mimeType" type="string" minOccurs="0" maxOccurs="1"/>
        <element name="md5Stamp" type="string"/>
        <element name="lastModifiedAuthor" type="string"/>
        <element name="locale" type="string"/>
        <element name="type" type="string"/>
        <element name="dir" type="string"/>
    </sequence>
</complexType>
<!-- End ContentInfo Information -->

<!-- OfferList Information -->
<complexType name="OfferList">
    <sequence>
        <element name="offer" type="iom:OfferInfo" minOccurs="0"
maxOccurs="unbounded"/>
    </sequence>
</complexType>
<!-- End OfferList Information -->

<!-- OfferInfo Information -->

```



```

<complexType name="OfferInfo">
  <sequence>
    <element name="offerName" type="string"/>
    <element name="description" type="string"/>
    <element name="lastModifiedAuthor" type="string"/>
    <element name="promotionName" type="string"/>
    <element name="segmentName" type="string" minOccurs="0"
maxOccurs="1"/>
    <element name="appName" type="string"/>
  </sequence>
</complexType>
<!-- End OfferInfo Information -->

<!-- CampaignOfferList Information -->
<complexType name="CampaignOfferList">
  <sequence>
    <element name="campaignOffer" type="iom:CampaignOfferInfo"
minOccurs="0" maxOccurs="unbounded"/>
  </sequence>
</complexType>
<!-- End CampaignOfferList Information -->

<!-- CampaignOfferInfo Information -->
<complexType name="CampaignOfferInfo">
  <sequence>
    <element name="priority" type="string"/>
    <element name="testMode" type="string"/>
    <element name="weight" type="long"/>
    <element name="offerStatus" type="string"/>
    <element name="lastModifiedAuthor" type="string"/>
    <element name="slotName" type="string"/>
    <element name="offerName" type="string"/>
    <element name="offerFrequency" type="iom:OfferFrequencyInfo"
minOccurs="0" maxOccurs="1"/>
    <element name="campaignName" type="string"/>
    <element name="appName" type="string"/>
  </sequence>
</complexType>
<!-- End CampaignOfferInfo Information -->

<!-- OfferFrequency Information -->
<complexType name="OfferFrequencyInfo">
  <sequence>
    <element name="count" type="long"/>
    <element name="durationTime" type="long"/>
    <element name="durationUnit" type="string"/>
    <element name="lastModifiedAuthor" type="string"/>
  </sequence>
</complexType>
<!-- End OfferFrequency Information -->

<!-- UsageRule Information -->
<!-- complexType name="UsageRule">
  <xs:complexContent>
    <xs:extension base="DemographicRule">
      <sequence>
        <element name="durationTime" type="long"/>
        <element name="durationUnit" type="string"/>
      </sequence>
    </xs:extension>
  </xs:complexContent>
</complexType-->
<!-- End UsageRule Information -->

<!-- VoicePromotion Information -->

```

```

<!-- complexType name="VoicePromotion">
  <xs:complexContent>
    <xs:extension base="BasePromotion">
      <sequence>
        <element name="timeout" type="int"/>
        <element name="promoType" type="string"/>
        <element name="bargainable" type="string"/>
        <element name="contents" type="iom:Content" minOccurs="0"
maxOccurs="unbounded"/>
      </sequence>
    </xs:extension>
  </xs:complexContent>
</complexType-->
<!-- End VoicePromotion Information -->

<!-- DurationList Information -->
<complexType name="DurationList">
  <sequence>
    <element name="duration" type="iom:DurationInfo" minOccurs="0"
maxOccurs="unbounded"/>
  </sequence>
</complexType>
<!-- End DurationList Information -->

<!-- DurationInfo Information -->
<complexType name="DurationInfo">
  <sequence>
    <element name="durationTime" type="long"/>
    <element name="durationUnit" type="string"/>
    <element name="variableName" type="string"/>
    <element name="appName" type="string"/>
  </sequence>
</complexType>
<!-- End DurationInfo Information -->

<!-- TestModeMinList Information -->
<complexType name="TestModeMinList">
  <sequence>
    <element name="testModeMin" type="iom:TestModeMinInfo" minOccurs="0"
maxOccurs="unbounded"/>
  </sequence>
</complexType>
<!-- End TestModeMinList Information -->

<!-- TestModeMinInfo Information -->
<complexType name="TestModeMinInfo">
  <sequence>
    <element name="minId" type="string"/>
    <element name="appName" type="string"/>
  </sequence>
</complexType>
<!-- End TestModeMinInfo Information -->

</schema>

```

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