CALLISTO

# PROFIVR

ADMINISTRATION MANUAL

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# Setup

## Installation

ProfIVR is installed through Callisto's Open Application Manager. The installation and updating process for OAM applications is described in the chapter Options of the Callisto platform administration manual.

## Privileges

The following application privileges can be assigned to a user for the ProfIVR application. For setting user privileges, see the chapter User administration of the Callisto platform administration manual.

| | |
|---|---|
| ACD | Provides access to the *ACD* tab. |
| DtmfMenus | Provides access to the *DTMF Menus* tab. |
| NonBusinessHours | Provides access to the *Non-Business Hours* tab. |
| Holidays | Provides access to the *Holidays* tab. |

## Access

*Configure* icon

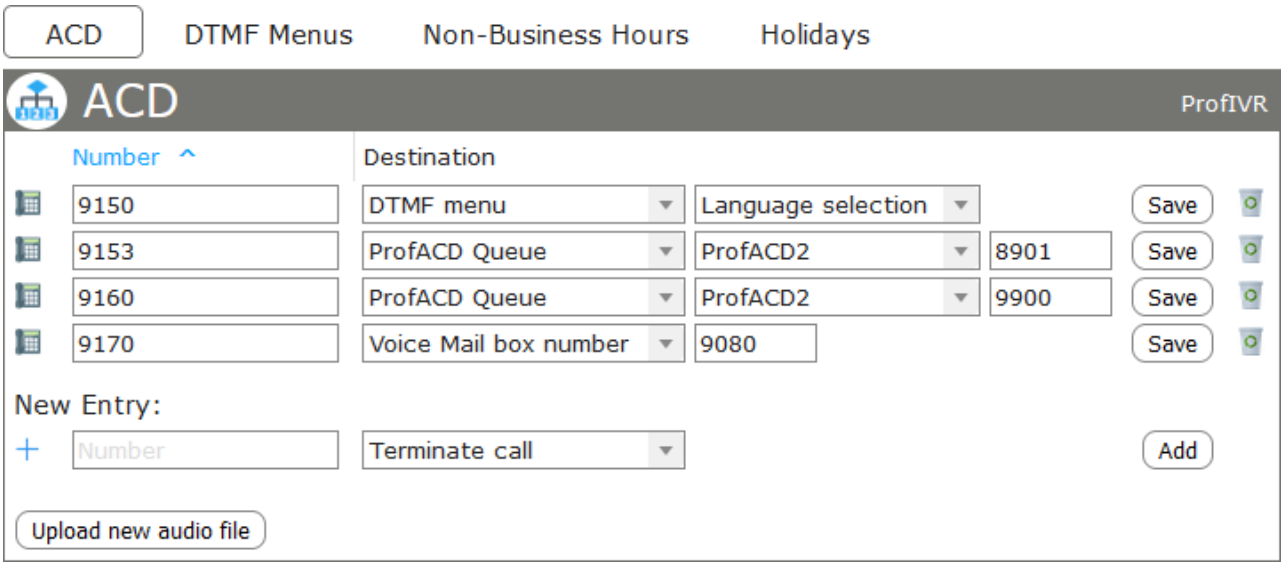
Administrators can access the ProfIVR configuration by navigating to System > Open Application Manager in the main menu. In the tab Applications, locate the ProfIVR instance and click on the *Configure* icon.

Users who were granted privileges to access the ProfIVR instance can do so by navigating to Applications in the main menu and clicking on the name of the ProfIVR instance.

# ACD and DTMF menus

## Automatic call distribution

In the *ACD* tab, the lines for the call distribution can be set.



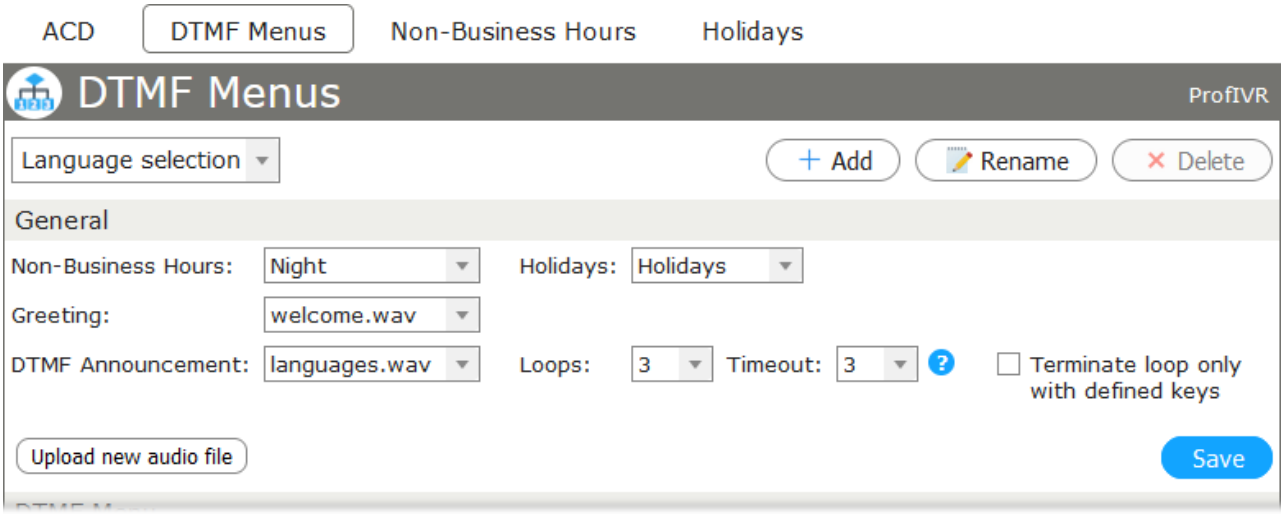

A caller who dialed or got redirected to the number set in the Number field will be handled with the action set in the Destination drop-down list. The number can either be a static number or a regular expression. Depending on the chosen Destination option, various configurations can be set (see chapter Transfer controls).

## DTMF menus

In the *DTMF Menus* tab, the menus used during IVR can be created, edited and deleted. To create a new menu, click the Add button in the top right corner and type a name for the new menu in the field labeled DTMF Menus. To edit an existing menu, choose it from the drop-down list labeled Please choose…. The selected menu can be renamed or deleted by clicking the respective button in the top right corner.

### General

The General section defines properties of the menu on how to handle a call when it enters the menu and before it gets dericted to another destination.




The following options are available:

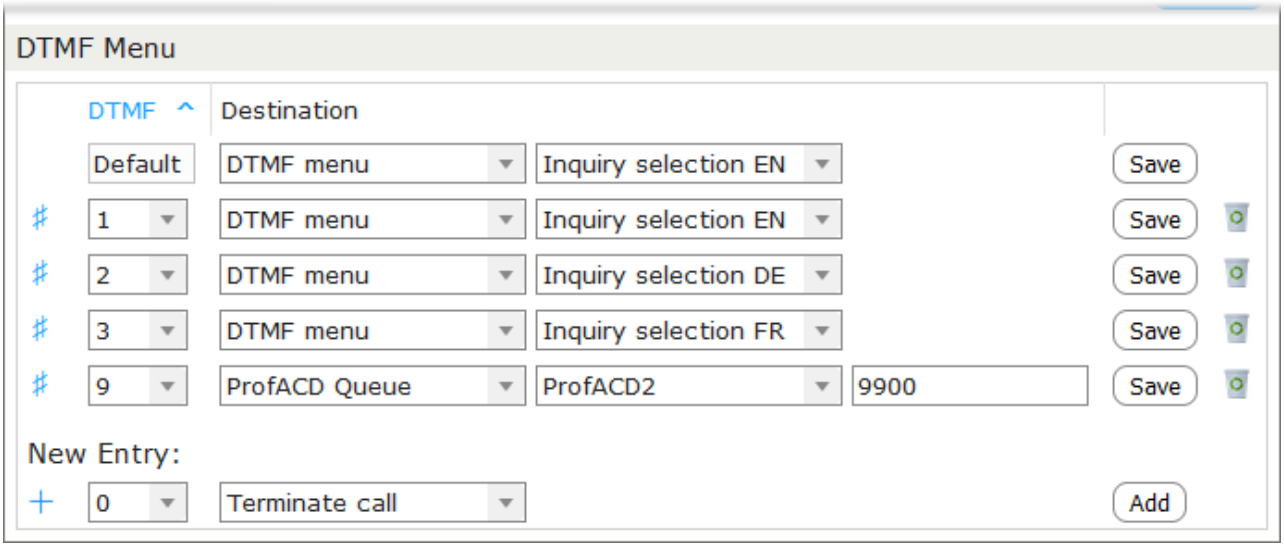
| | |
|---|---|
| Non-Business Hours and Holidays | If the call reaches the menu during a time when non-business hours or holidays are active, the call will be handled by the respective setup. These setups can be configured in the *Non-Business Hours* and *Holydays* tabs. |
| Greeting | The audio that will be played to a caller when first entering the menu. |
| DTMF Announcement | The audio that will be played after the greeting. It should contain instructions on the options the caller can choose. |
| Loops | How many times the DTMF announcement should be repeated before terminating the loop (i.e. proceeding with the default option). |
| Timeout | Time (in seconds) to wait before repeating the announcement again or terminating the loop. |
| Terminate only with defined keys | Defines the action to take if the caller presses a key that is not defined in this DTMF menu.<br>• If checked, the key press will be ignored and the announcement loop proceeds as configured above.<br>• If unchecked, the key press will terminate the loop and the default option will be executed. |

With the Upload new audio file button, audio files can be uploaded to use as greetings or DTMF announcements.

Audio files must be of the format: Wave (PCM); 8 kHz; 16 Bit; mono.

## DTMF Menu

In this section, all the options that will be available to the caller are set.




Each option consists of a DTMF entry and a Destination. The DTMF entry sets which key a caller has to press to select this option: The option can be mapped to any key available on standard 12-key telephone keypads, i.e. the digits from 0 to 9, as well as the star sign ? and the number sign #. Additionally, a *Default* option will always be set, which will be chosen automatically once the announcement loop terminates (as defined in the General section).

The Destination defines what action to execute when the corresponding option is chosen (see chapter Transfer controls).

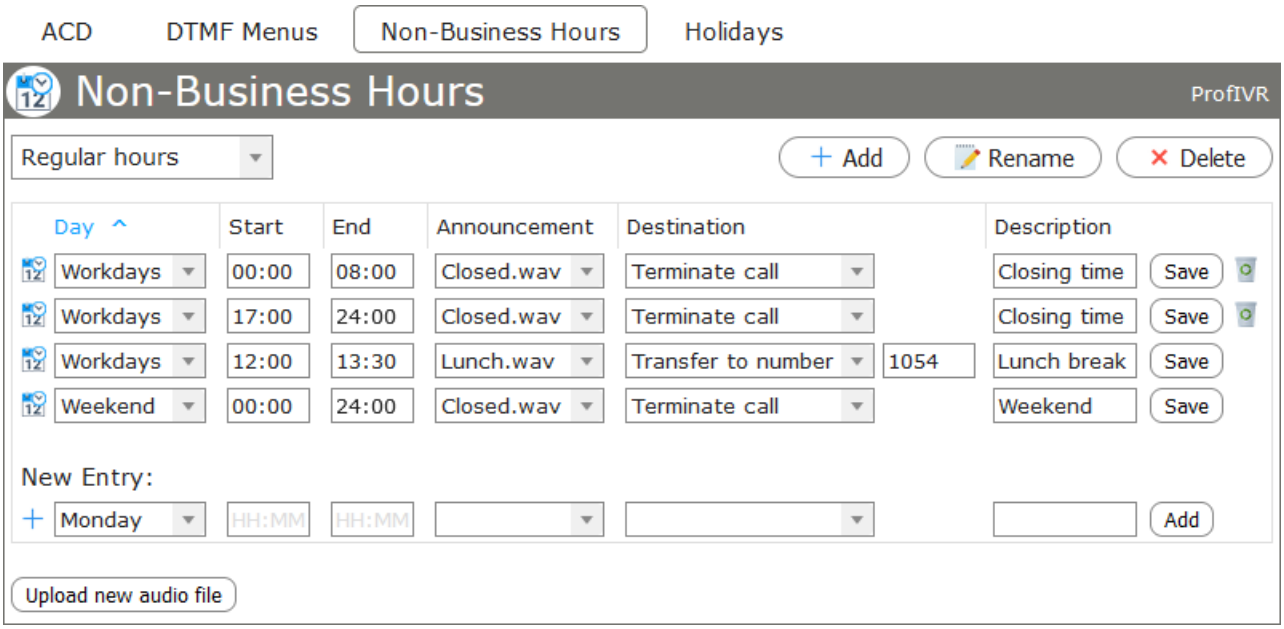
# Non-business hours and holidays

The tabs *Non-Business Hours* and *Holidays* contain options for setting the times when the company's staff is not available. During these times, a menu will handle calls differently than normal, as defined in these settings. The call may be terminated after an announcement, routed to a specific number or a voicemail box.

In either tab, choose the set of non-business hours/holidays you want to configure by selecting it from the the drop-down menu labeled Choose…. To create a new set, click the Add button in the top right corner. The selected set can be renamed or deleted with the buttons labeled Rename and Delete, respectively.

A set of non-business hours/holidays can only be deleted if it isn't assigned to any DTMF menu.

## Configuring non-business hours



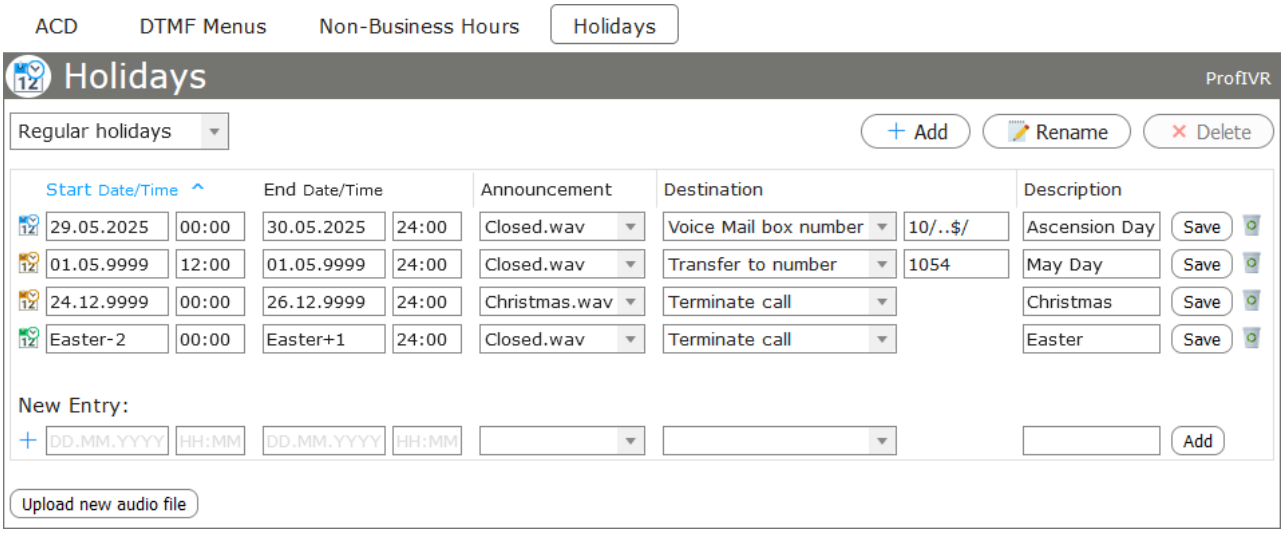

| | |
|---|---|
| Day | The day of the week when the non-business hours should be active. The option Workdays will apply the settings to every day from Monday to Friday, and the option Weekend will apply to Saturday and Sunday. |
| Start and End | When the non-business hours should start and end. The time is set in 24-hour format. |

One single entry will set a single consecutive time range within one day. If you have multiple non-consecutive non-business hours one day, each time range requires a separate entry. Similarly, if your non-business hours extend from one day to the next (i.e. overnight), two entries must be configured for both days.

If your company stops taking calls on 17:00 and opens again on 8:00 the following day, two entries are needed.

- from 17:00 to 24:00
- from 00:00 to 08:00

## Configuring holidays




The Start and End colums consist of a *Date* and *Time* field each. In the *Date* field, setting the year to 9999 will activate the holiday every year at the same date and time. Entering the string Easter will calculate the date of Easter every year. The strings Easter-<*n*> and Easter+<*n*> will set the date to *n* days before and after Easter, respectively.

In 2025, the date of Easter is 20 April 2025. Entering the string Easter-2 into the Date field sets the holiday start to 18 April 2025.

## General settings

The following settings are applicable to both non-business hours and holidays configurations.

| | |
|---|---|
| Announcement | The audio file that will be played during the set non-working hours. |
| Destination | The action to take when a call arrives during the set time (see chapter Transfer controls). |
| Description | An optional description for the entry. |

# Transfer controls

## Transfer control actions

In all tabs, various transfer controls are available to set a call's routing destination. All fields promting for numbers also acept wildcards and regular expressions (see Dynamic destination routing).

| | |
|---|---|
| DTMF Menu | Direct the call to a DTMF menu set up in the *DTMF Menus* tab. |
| Transfer to number | Direct the call to the specified number/regex. |
| Blind transfer to number | Direct the call to the specified number/regex using SIP blind call transferring. |
| Bridge to number | Use callisto to bridge the current call and the call to the destination. |
| Application | Direct the call to the specified application, using the provided number/regex as parameter. |
| ProfACD Queue | If ProfACD is available, direct the call to a call queue. Choose the ProfACD instance you want to direct the call to from the second drop-down menu, and set the number/regex to the corresponding queue's number. |
| Voice Mail box number | Allow the caller to record a voicemail to the specified number. |
| Terminate call | End the call immediately. |

## Dynamic destination routing

Besides regular numbers, regular expressions can be used to determine the call destination. A regex pattern must be enclosed by two slashes and will match against the number dialed by the caller. Numbers and regular expressions can be combined by putting absolute numbers before or after the regex pattern. For details on the regex syntax, see the Regular expressions quick reference.

Besides proper regular expressions, two wildcards also exist that don't need to be enclosed by slashes:

- . will match exactly one digit.
- T will match zero or more digits.

The Destination field contains the following value: 10/..$/

The digits 10 are an unchanging value outside the regex pattern. The pattern itself will take the last two digits of the number dialed by the caller.

- A caller who dialed 8801 will be routed to 1001.
- A caller who dialed 8812 will be routed to 1012.
- A caller who dialed 907712 will be routed to 1012 as well.

### Redirection number

The syntax /REDIR/*/ determines the caller's redirection number.

The number *1234* is called. This number is diverted to a ProfACD number: If the destination agent is

occupied or doesn’t answer, it is possible to call back the number *1234* when /REDIR/*/ is used in the number field.

# ProfIVR AI Enhanced

## Overview

This manual documents the optional Artificial-Intelligence layer of ProfIVR. It is written for Callisto system administrators and integrators who configure inbound call handling, and it should be read together with the standard ProfIVR Manual, whose concepts (ACDs, DTMF menus, Non-Business Hours, Holidays and Transfer Controls) it builds upon rather than replaces.

### An Enhancement, Not a Replacement

The AI capability is an enhancement of the existing ProfIVR DTMF menu. Every feature of the classic menu continues to work exactly as before. The AI simply adds a new, optional way of guiding a caller to the correct destination. A menu can therefore be operated in the traditional touch-tone manner, or, where enabled, as an AI-assisted conversation that ultimately uses the very same options and destinations already defined for that menu.

### Activated by a Separate AI License

The AI enhancement is license-gated. The AI-related options are shown in the ProfIVR interface, and the AI behavior is enabled, only when a separate AI License has been added to the Callisto system. Without that license ProfIVR behaves precisely as the classic DTMF menu described in the standard ProfIVR Manual, and none of the AI settings are visible. Adding the license unlocks the AI configuration described in this document and allows it to be switched on per DTMF menu.

### From Key Presses to a Conversation

When the AI option is enabled on a DTMF menu, a call that reaches that menu is handled as a natural spoken conversation between the caller and an AI Agent, instead of requiring the caller to listen to a list of choices and press a digit. The agent greets the caller, listens to the request in the caller's own words, and asks follow-up questions whenever it needs more information to understand what the caller needs.

### How the AI Agent Routes the Call

The purpose of the conversation is to identify the best option for the caller. The routing targets are unchanged: they are the options already configured on the DTMF menu, each with its destination defined by the standard Transfer Controls (transfer, blind transfer, bridge, ProfACD queue, application, voicemail, sub-menu or terminate). Based on the conversation and the caller's answers, the AI Agent determines which option fits best and, once it is confident, simply performs the transfer to that option's destination.

### How the AI Behavior Is Defined

The behavior of the AI Agent is not coded; it is described in plain text. Two kinds of description work together:

- A **system message** — a textual description that defines how the agent should act: its persona and tone, the conversation flow, the questions it should ask, and the rules it must follow before transferring a call.
- A **per-option description** — every option in the DTMF menu carries its own short description. Together these tell the agent which options exist and what each one is for, so it can match the caller's answers to the available options and choose the most appropriate one.

In short: the system message governs how the agent converses, and the option descriptions tell it where each request should ultimately go. Writing these descriptions well is the core configuration task for an AI-enabled menu and is covered in detail in the following sections.

## Enabling AI on a DTMF Menu

Switching the AI enhancement on is deliberately simple. Once the AI License is present on the Callisto system, every DTMF menu in ProfIVR gains one additional control: an AI enhancement checkbox. No other setup is needed to activate the feature itself.

To enable the AI Agent for a particular menu, open that DTMF menu and tick the checkbox, then save. From that point on the menu handles incoming calls as an AI-assisted conversation instead of the classic touch-tone prompt. Leaving the box unchecked keeps the menu operating exactly as before, as a standard DTMF menu.

Because the setting lives on each DTMF menu individually, the AI enhancement can be applied selectively: some menus may run as AI conversations while others continue to use traditional DTMF selection. This makes it easy to introduce the AI gradually — for example, on a single front-line menu — before rolling it out more widely.

When the checkbox is ticked, the AI configuration for that menu becomes relevant: the system message and the per-option descriptions that direct the agent's behavior. Both are described in the following sections.

## Writing the System Message

The behavior of the AI Agent is driven entirely by plain-text prompt files. For an AI-enabled DTMF menu there are two kinds of file:

- The **main description** (the system message). One file per menu. It describes how the agent should behave and what it should ask — its persona and tone, the way it conducts the conversation, the questions it puts to the caller, and the rules it must follow before transferring a call.
- A **per-option description**. One file for each option in the DTMF menu. It gives the agent additional information about that single option, so the agent can recognize when that option is the right destination for the caller.

Together these files give the agent everything it needs: the main description tells it how to converse, and the option descriptions tell it what each available option is for. The craft of writing an effective system message — persona, conversation flow, gates and formatting — is covered in detail in the companion ProfIVR Manual (AI Enhanced). This section concentrates on the file model and on how these files are loaded into ProfIVR.

## Loading Prompts into ProfIVR

There are two ways to bring the prompt files into an AI-enabled DTMF menu: uploading them individually or importing a complete menu from a single JSON file.

### Method 1 — Upload Prompts Individually

Using the Upload prompt button, the text files are uploaded to the Callisto system one by one. Afterwards the correct file must be assigned to each part of the menu: the main description for the DTMF menu itself, and the matching description file for every option. This method gives full manual control and is convenient when only a single prompt needs to be changed.

## Method 2 — Import and Export a Complete Menu as JSON

Each DTMF menu also has an Import option and a matching Export option. Export writes the entire menu to a single, human-readable JSON file; Import loads such a file back in. The JSON bundles everything in one place — the menu settings, the list of options with their destinations, and the full text of every prompt (both the main description and each option description) embedded inline. Importing a menu therefore loads the whole configuration, including all prompt files, in one step — no need to upload files individually.

This makes it easy to move a complete configuration between systems, keep a backup, or hand a menu to someone else for editing. The example file shows the structure:

```
{
  "callisto": {
    "type": "ProfIVR.DtmfMenu",
    "formatVersion": 1,
    "schemaVersion": 1007,
    "exportedFrom": "ProfIVR",
    "exportedAt": "2026-06-19 12:25:24"
  },
  "menu": {
    "name": "CruiseShip",
    "aiEnabled": 1,
    "promptTxt": "descriptionCruise.txt",
    "saveTranscript": 1
  },
  "dtmf": [
    { "dtmf": "0", "destination": ["ProfACD", "ProfACD2", "8887"], "promptTxt":
 "emergency.txt" },
    { "dtmf": "1", "destination": ["Transfer", "1027"], "promptTxt": "wake-
up call service.txt" },
    { "dtmf": "6", "destination": ["DTMF", "Restaurants"], "promptTxt": "restau
rant.txt" }
    ... one entry per option ...
  ],
  "prompts": {
    "descriptionCruise.txt": "You are a helpful Cruise Ship voice Assistant ...
",
    "emergency.txt": "...",
    "restaurant.txt": "..."
    ... the full text of every prompt file, inline ...
  }
}
```

The main parts of the file are:

- callisto — identifies the file as a ProfIVR DTMF-menu export (type, format and schema version, and when it was exported).
- menu — the menu's own settings. promptTxt names the main description file (the system message), and aiEnabled shows that the AI enhancement is switched on.
- dtmf — one entry per option, giving its digit, its destination (the Transfer Control to use) and the

promptTxt that names the option's description file.
- prompts — the full text of every prompt file, embedded inline and keyed by file name, so the single JSON carries the entire configuration.

## Extended Options for AI Menus

A traditional DTMF menu is limited by the telephone keypad. A caller can only press the digits 0–9 and the two special keys ? and #, so a classic menu can offer no more choices than there are keys — one destination per key.

When a menu is handled by the AI Agent, the caller no longer presses keys at all: they simply describe what they need and the agent selects the destination. This removes the keypad limit, so an AI-enabled menu can define more options than there are keys on a phone. These additional entries are called **extended options**, and they are available only when the AI enhancement is active.

Extended options are numbered beyond the keypad — 10, 11, 12, and so on. Because they cannot be reached by pressing a key, a classic DTMF caller never uses them; they exist purely to give the AI Agent more distinct destinations to route to.

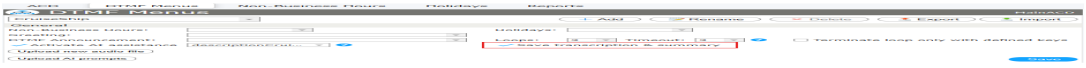
Configuring an extended option is the same as configuring a standard option: each one has a destination defined through the standard Transfer Controls and its own per-option description file telling the agent what the option is for. The only difference is that the option is reached through conversation rather than a key press.

## Reports

ProfIVR includes a Reports section for tracking what happens to a call. It lets an administrator follow how each call went and where the caller was finally transferred, which is especially useful for an AI-enabled menu where the routing decision is made through conversation rather than a fixed key press.

### Enabling Reporting per DTMF Menu

Reporting is switched on separately for each DTMF menu. Before any call data is recorded, tracking must first be enabled on the menu by ticking its reporting checkbox and saving. Just like the AI enhancement itself, this is a per-menu setting, so reporting can be turned on only for the menus that need it.



### Choosing How Long Reports Are Kept

How long the recorded reports are retained is configured globally, at the application level — not per menu. A single setting determines the retention period for all stored reports, after which older entries are removed automatically. This keeps report storage under control and helps meet data-retention requirements.

### Viewing the Saved Reports

The saved reports are reviewed in a separate Reports tab, which shows a list of all reports for a selected period of time.

Each entry summarises one call at a glance — when the conversation took place, its duration, the caller, the

number that was called, the final action taken, and a simple representation of the call flow — and indicates whether it was an AI call or a standard one.

For more detailed information, click the Show button on a report. This opens a separate window with a clearer, more detailed representation of the call flow. If the call was AI-enhanced, an AI summary of the conversation is also shown.

For an AI-enhanced call there is one further option: the full transcript of the conversation between the caller and the AI Agent can be reviewed, giving a complete record of what was said and how the agent reached its routing decision.

## Integration with the ProfACD Viewer

When ProfIVR is configured to use AI, the ProfACD Viewer gains the additional ability to provide agents with more information about the call. Before the call reaches an agent, the Viewer displays an AI Call Summary generated from the caller's interaction with ProfIVR, giving the agent an overview of the reason for the call and the service the caller was routed to.

For more information, refer to the chapter ProfACD Viewer with Call Summary.

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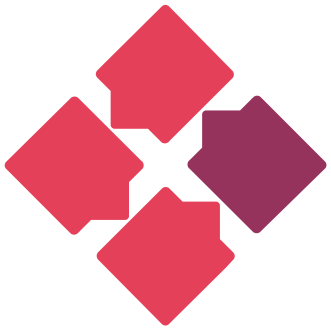

CTMODULE

COMMUNICATION TECHNOLOGY MODULES


**CTMODULE AG**

Lehnweg 1

CH-3123 Belp/Berne

Switzerland

T: +41 (0)31 531 11 11

F: +41 (0)31 531 11 12

sales@ctmodule.com

**OFFICE GERMANY**

Frankfurter Straße 92

D-65760 Eschborn/Frankfurt

Germany

T: *+49 6196 2049173-0*

F: *+49 6196 2049173-9*

sales-d@ctmodule.com

**OFFICE SERBIA**

Gospodara Vučića 145

RS-11000 Belgrade

Serbia

T: +381 18 308076

sales@ctmodule.com