

IMPLEMENTATION GUIDE

SMART ROUTING

The voice virtual agent of Rainbow Hub

EARLY ADOPTERS EDITION

Configuration, content and acceptance testing

Version 1.0 · 19 November 2026 · Author: Laurent

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Overview

A voice virtual agent that answers, routes and never leaves a call unanswered.

Smart Routing is a voice virtual agent built into Rainbow: it answers the call, handles common questions using a knowledge base and transfers the call to the right destination. It is configured with no development, in five steps, from **Administration > [customer company] > Communication > Welcome services > Smart routing**.

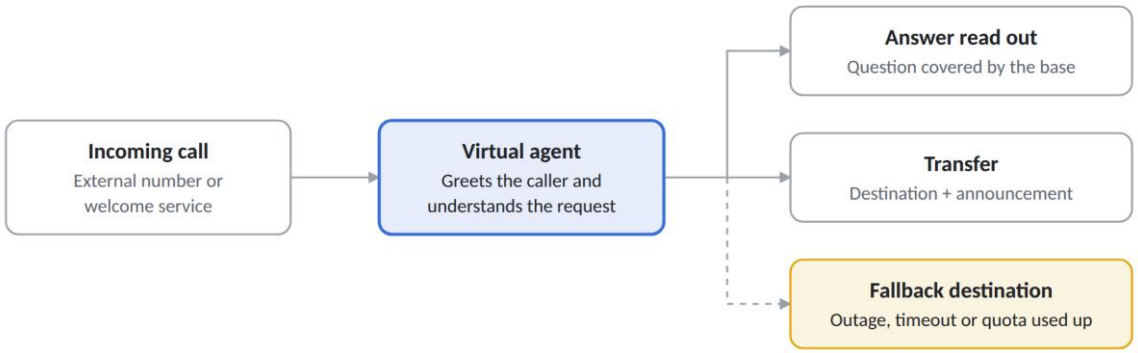


Figure 1 – *Call flow: answer, transfer or fallback*

The agent answers on its own when the knowledge base covers the question, and transfers the call otherwise; the fallback destination takes the call if the agent cannot handle it.

This guide is for partners and administrators who set up the service for a customer. Going live is a short engagement; most of the work is preparing the content with the customer.

Feature	Value
Availability	24/7: no call left unanswered
Languages	French, English, German, Spanish
Number of agents	Unlimited, no user licence needed
Usage	500-minute packs, cumulative
Monitoring	Email alerts to the administrator on quotas
Region	Europe

Release 179 adds a knowledge base shared between agents, CSV import and export, and usage alerts.

EARLY ADOPTERS EDITION

This edition accompanies the early adopter release of Smart Routing. The temporary limitations of this release are flagged by this box in the relevant sections: agent list, agent creation, **Call management** tab, writing the knowledge base, company base, transfer conditions and acceptance testing.

They will be lifted in upcoming releases.

Prerequisites

What to gather before the configuration meeting.

The customer needs a Smart Routing licence (500-minute packs) and a Voice Business, Voice Enterprise or Voice Phone offer. Everything else is prepared with the customer before the configuration meeting.

Licences and access

- ☐ Active Smart Routing licence
- ☐ Voice Business, Voice Enterprise or Voice Phone offer
- ☐ Company administrator account in Rainbow

Telephony

- ☐ Agent’s internal number, plus an external number if the agent must be reachable from outside
- ☐ Fallback destination if the agent is unavailable (welcome service, group or person)
- ☐ Users or hunt groups to transfer to, created in Rainbow

Content to write with the customer

- ☐ Agent’s name, voice (female or male) and language
- ☐ Welcome message, stating that the caller is talking to a virtual assistant
- ☐ End-of-call message
- ☐ List of reachable services, each with its transfer condition and the sentence announced before the transfer
- ☐ Frequently asked questions: opening hours, address, access, prices, procedures, case follow-up

The 5 steps

A no-code configuration, tab by tab.

Each step matches a tab in the agent's configuration window. Follow them in order, then save with **Update**.

Step	Console tab	What you configure
1	Application	Name, description, internal number (set at creation), external number or welcome-service destination
2	Call management	AI agent template and fallback destination (mandatory)
3	Agent	First name, voice, welcome message and end-of-call message
4	Destinations	Members, hunt groups, hunt groups with a waiting queue or welcome services, with routing criteria and transfer message
5	Knowledge base	Questions and answers to reply without transferring, plus the shared company knowledge base

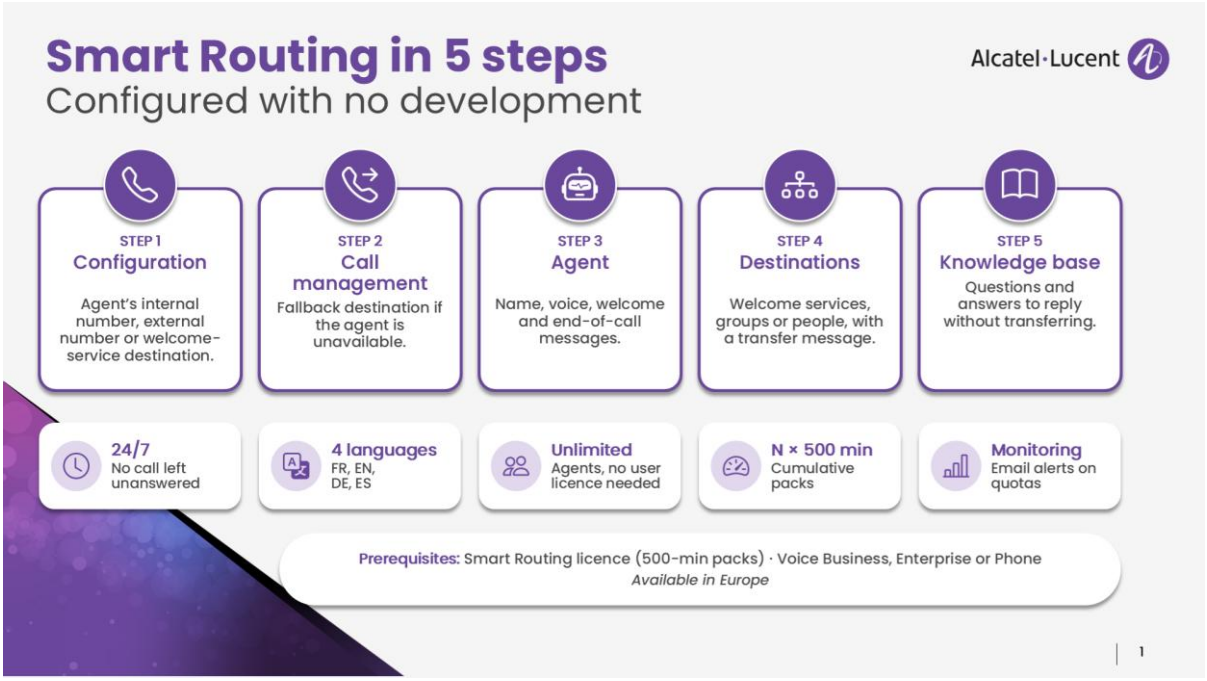


Figure 2 – *Smart Routing in 5 steps, configured with no development*

Steps 4 and 5 take the most work: they decide whether the agent answers correctly and transfers to the right place. The following chapters cover them in detail.

Configuration in Rainbow administration

The console screens, field by field.

The service is managed in **Administration > [customer company] > Communication > Welcome services > Smart routing**. The labels below are those of the English console (release 2.181).

Agent list

- The table shows each agent's name, description, internal number and public number.
- A gauge shows the minutes used on the company's pack (for example "607 / 2000 minutes used").
- **Company knowledge base** opens the company's shared knowledge base; **Create** creates an agent.
- The three-dot menu on a row offers **Service information**, **Clone** and **Remove**. **Clone** lets you start from an existing agent.

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The console lets you delete an agent that is still used elsewhere: automated attendant key, hunt group or waiting queue overflow. Callers then hear an error message. Before **Remove**, take the agent out of these destinations.

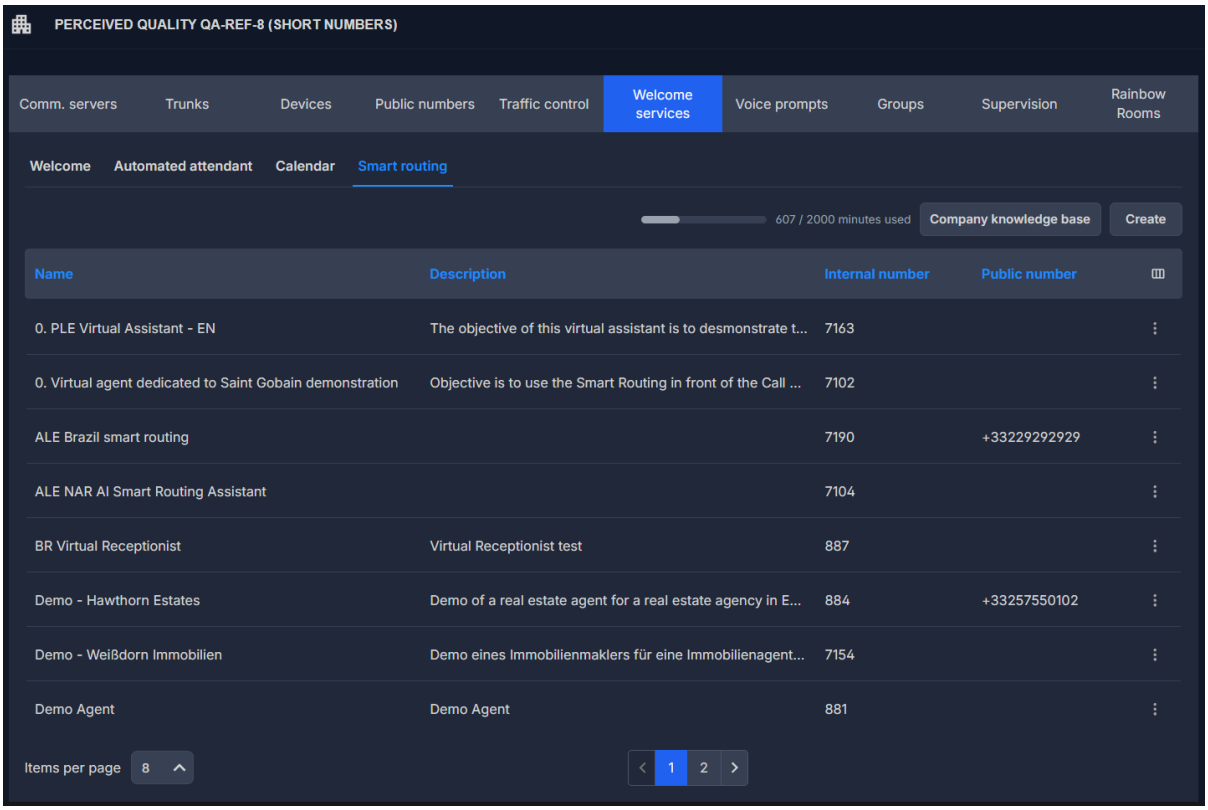


Figure 3 – *Smart routing agent list, minute gauge and Company knowledge base and Create buttons*

Creation

Create opens a wizard. Enter the name (mandatory) and the description (255 characters maximum), pick the internal number from the available numbers, then click **Next**. The internal number cannot be changed afterwards, and the external number cannot be set at creation.

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The company's time zone must be set before you create an agent. Otherwise, creation fails with an error code. Check it in the company settings before clicking **Create**.

Application tab

- **Application name** and **Description**: identify the agent in the list.
- **Internal number**: set at creation, cannot be changed.
- **External number** (optional): add it after creation. Calls to this number go straight to the agent, bypassing any welcome service. Without an external number, the agent can still be reached as a welcome-service destination, during open or closed hours.

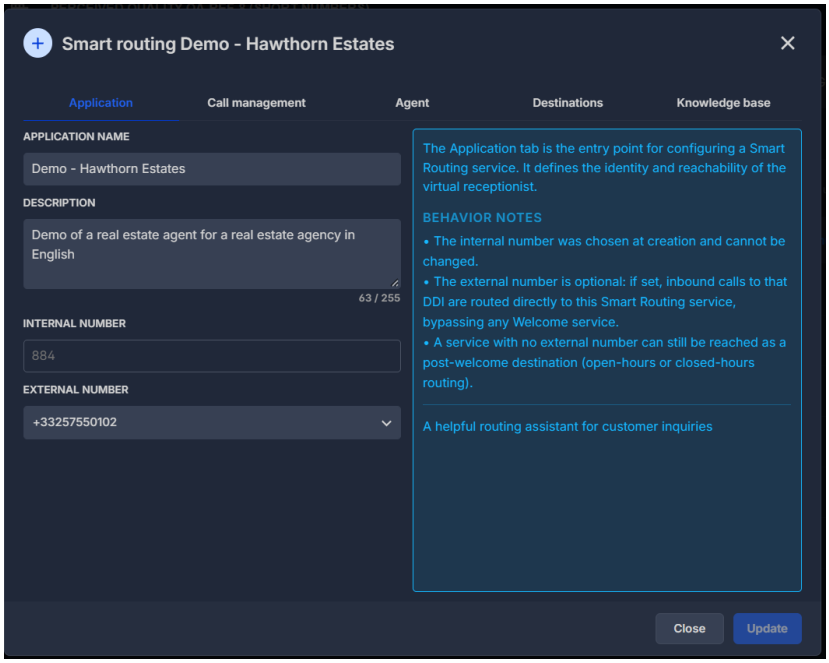


Figure 4 – *Application tab: name, description, internal number and external number*

Call management tab

- **Voice agent**: the AI agent template used, for example "IA Voice Agent Template for Virtual Receptionist".
- **Fallback destination** (mandatory): takes the call if the agent is unavailable, the processing timeout is reached or the minute quota is used up. Available types: **Member**, **Hunt group**, **Hunt group with waiting queue** and **Welcome service**.

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When the processing timeout is reached, the agent's last sentence may be cut off, and the caller may hear no ringback tone, or a single ring, while the call is forwarded to the fallback destination. The call connects normally when the destination answers.

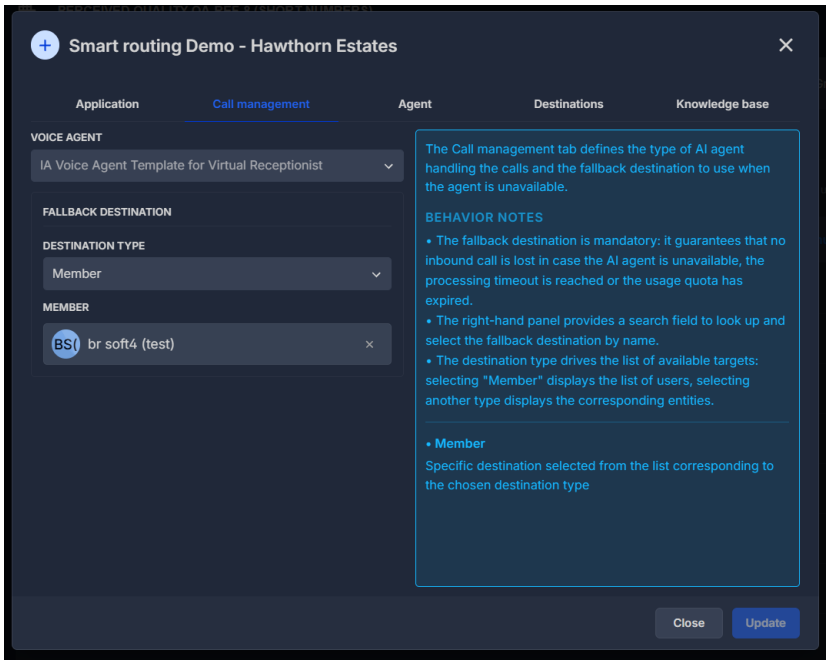


Figure 5 – *Call management tab: agent template and fallback destination*

Agent tab

- **Agent name**: the agent's first name.
- **Voice type**: the voice's language and gender, for example "en-GB — female".
- **Welcome message** (255 characters maximum): must clearly tell callers they are talking to an AI.
- **End message** (255 characters maximum): optional but recommended. Without it, the agent hangs up with no closing announcement.

Both messages are text spoken by the selected voice, not audio files.

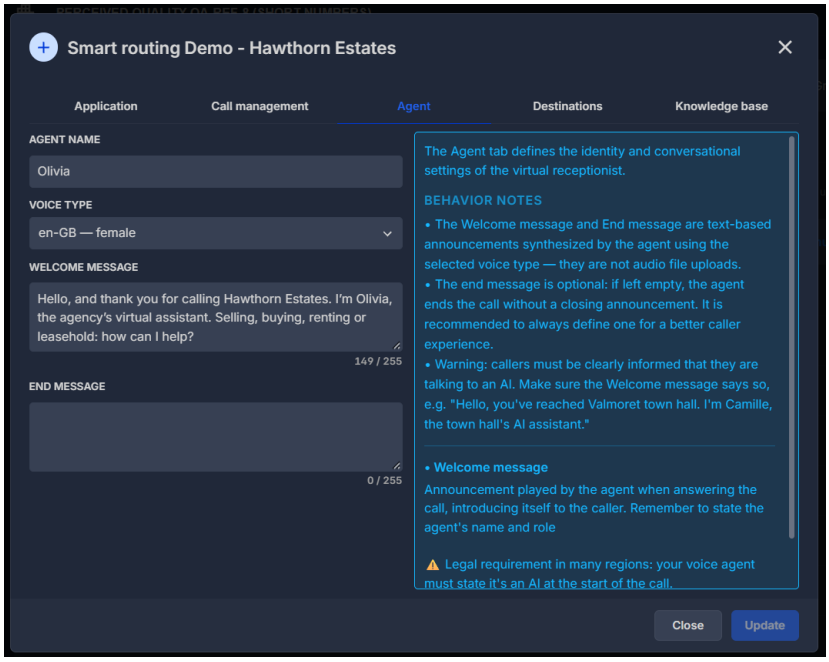


Figure 6 – *Agent tab: first name, voice, welcome message and end message*

Destinations tab

- **+ Add** adds a destination, **Import** loads a CSV file. The three-dot menu offers **Export** and **CSV template**.
- Each destination has a type, a target, a **Routing criteria** (255 characters maximum) and a **Transfer message** (optional but recommended).
- **Routing criteria** is the most important field: it is injected as is into the AI's instructions.
- At least one destination is needed for the agent to transfer calls.

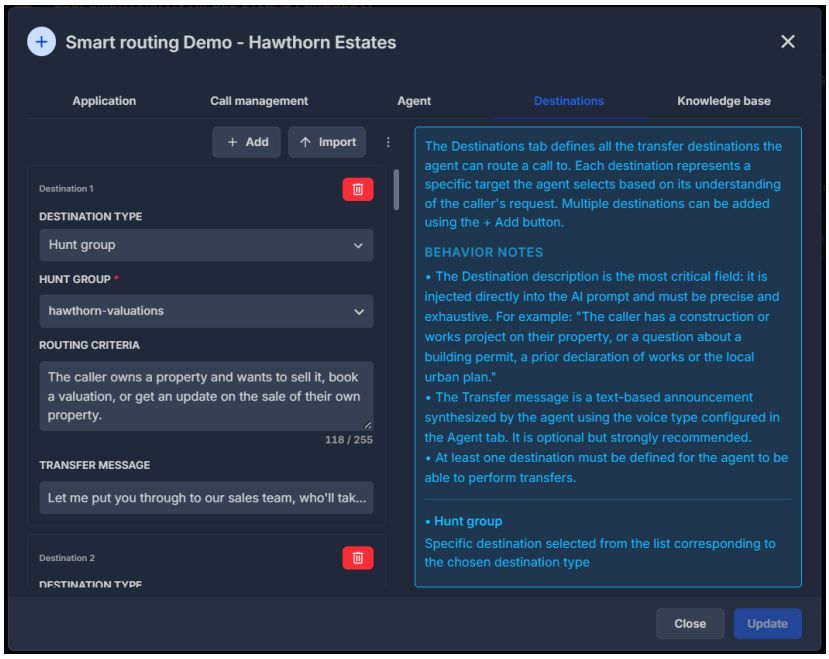


Figure 7 – *Destinations tab: type, hunt group, routing criteria and transfer message*

Knowledge base tab

- **Apply company knowledge base** adds the company knowledge base items to the agent, on top of the agent's own items. Turn it off if the company base is not relevant to this agent, for example when it gives different opening hours from the agent's.
- **+ Add**, **Import** and the three-dot menu (**Export**, **CSV template**) work as for destinations.
- Each item has a **Name** and a **Content** of 400 characters maximum; the bin icon deletes it.

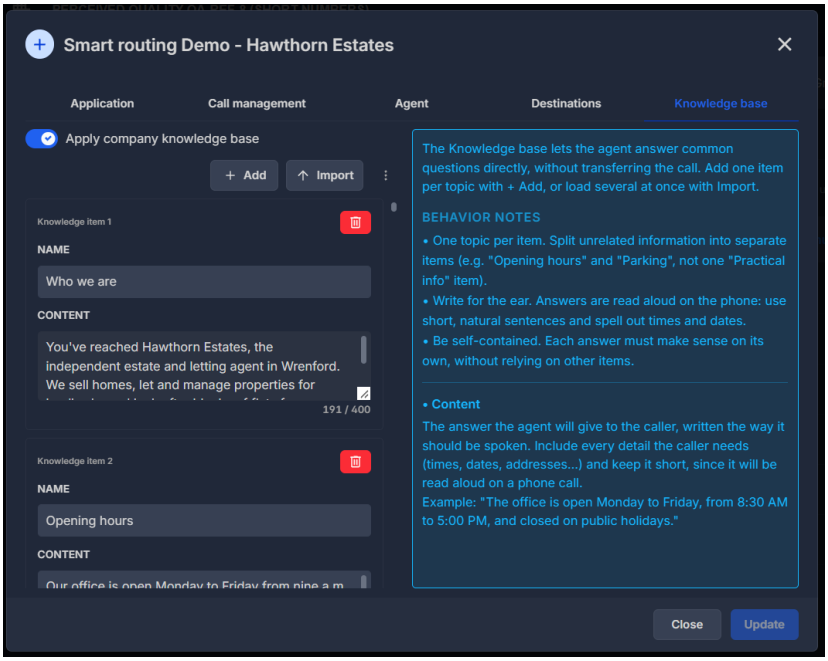


Figure 8 – *Knowledge base tab: company knowledge base, name and content items*

> **REMEMBER**
> Save with **Update**. **Close**, the cross or the Esc key close the window without saving.

Writing the messages: the rules that matter

- The welcome message is short: organisation name, agent's first name, "virtual assistant", then the main areas covered.
- It is written for the ear, in the agent's language, with the local register (formal address in German, for example).

Example: "Hello, and thank you for calling Hawthorn Estates. I'm Olivia, the agency's virtual assistant. Selling, buying, renting or leasehold: how can I help?"

Writing the knowledge base

Short, self-contained answers written for the ear.

Each item pairs a title, which the agent matches to the caller's question, with a content, which it reads aloud. A base of 40 to 50 items usually covers an organisation's common questions.

Field	Role	Writing rule
Name (title)	Identify the topic of the question	Short, phrased the way a caller would say it: "Opening hours", "Where can I park?"
Content (content)	Answer read to the caller	Complete and self-contained, in short sentences, written for the ear

Writing rules

- One topic per item. Keep "Opening hours" and "Parking" separate rather than grouping them under "Practical information".
- Each answer makes sense on its own, without referring to another item.
- Times, dates, amounts and numbers are spelled out ("from nine a.m. to five thirty p.m.").
- On multi-site organisations, each item names its site: "Swimming pool opening hours", "Tilleuls school", not just "Opening hours".
- No item mentions a transfer or gives a number to call for a service that has its own destination. Otherwise, the agent reads out the number instead of transferring.



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When the caller asks for a service that has no destination, the agent may transfer the call to another destination, especially if there is only one. Only mention services in the knowledge base that have their own destination, and keep reception as the default destination.

CSV import

The file follows the template provided in the console: UTF-8 encoding with BOM, semicolon separator, `title;content` columns. Titles are 100 characters maximum, contents 400 maximum, and the base holds 50 items maximum. A field containing a semicolon or quotation marks is wrapped in quotation marks.

WARNING
Importing replaces the whole existing base. Export the current base before importing a new version.

```
title;content
Opening hours;Our office is open Monday to Friday from nine a.m. to five thirty p.m., and on
Saturday from nine a.m. to four p.m.
Office address and parking;Our office is at fourteen Market Square, Wrenford. There is a pay and
display car park on Station Road, two minutes' walk away.
```

Company base or agent base

The company knowledge base, opened with **Company knowledge base** in the agent list, holds information shared by all agents. It is added to the agent's base when **Apply company knowledge base** is on. Check

that it does not contradict the agent's base: a "company opening hours" item can distort an agent's own opening hours.

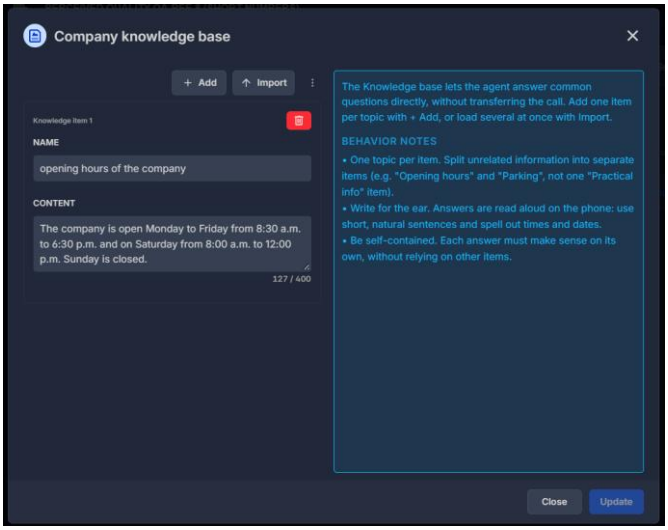


Figure 9 – *Company knowledge base, shared between agents*

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When the company base and the agent's base cover the same topic, the agent's item does not take precedence: the agent may read out the answer from the company base. Cover each topic in only one of the two bases, or turn off **Apply company knowledge base** for this agent.

Configuring transfer destinations

A distinct target and a precise criterion for each service.

The agent picks the destination by comparing the caller's request with the conditions written in natural language. The transfer is then identified by its target.

> **KEY RULE**
> **Each destination must have a different target**, otherwise every transfer goes to the first line.

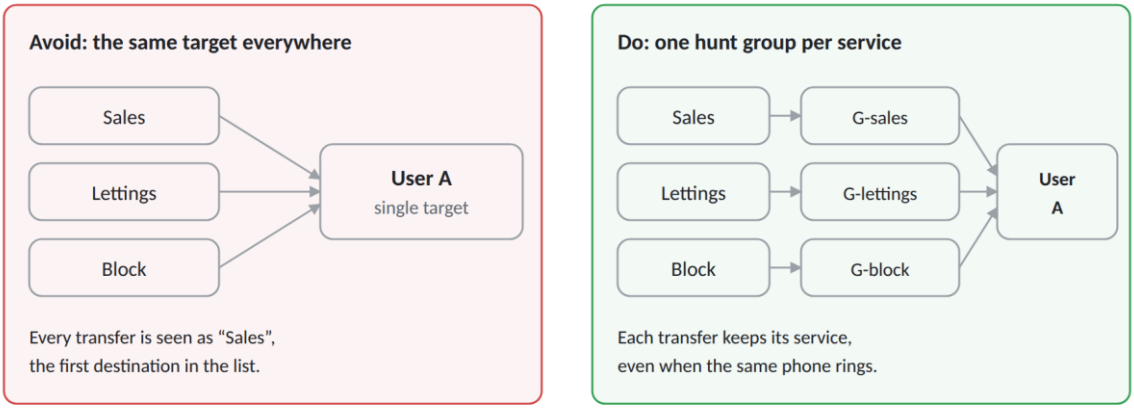


Figure 10 – *One target per destination: avoid and do*

With a single target, the system falls back on the first line; one hunt group per service keeps each destination distinct, even with a single person behind them.

Console field	Role	Rule
Destination type	Kind of target	Member, Hunt group, Hunt group with waiting queue or Welcome service
Target	User, group or welcome service to transfer to	In the CSV: `user` with the login email, or `hunting_group` with the exact group name
Routing criteria	When to transfer to this destination	255 characters maximum; one sentence that starts with the caller's profile, then their reasons
Transfer message	What the agent says before transferring	Optional but recommended; short, it names the service: "Let me put you through to our block management team."

Writing conditions that tell services apart

- One sentence per destination, around 150 characters. Long conditions that list many topics capture every call.
- The start of the sentence sets the destination apart: "The caller already rents a property managed by us…", "The caller is looking for a home to rent and is not yet one of our tenants…".
- No cross-reference from one condition to another, and no time-based condition: the agent does not necessarily know the time.
- Reception comes last, as the default: "…or their request doesn't match any other team".

- The “answer from the knowledge base first” rule belongs in the agent’s instructions, not in each condition.



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The agent does not check opening hours before transferring: it transfers even when the knowledge base says the service is closed. Handle closures on the destination itself, for example with a welcome service that applies the opening hours.

One person for several services

Create one hunt group per service in Rainbow, with the same person in several groups. Each destination then keeps its own target, and the group name shown on the incoming call reveals which service was chosen.

CSV import

Columns `destinationType;userEmail;name;condition;preTransferSentence`, with the same encoding rules as the knowledge base. For a user, `name` stays empty; for a group, `userEmail` stays empty. Groups and users must exist before the import.

```
destinationType;userEmail;name;condition;preTransferSentence
hunting_group;;hawthorn-block;The caller owns or rents a flat in a block we manage and asks about the service charge, communal areas or major works.;Let me put you through to our block management team.
hunting_group;;hawthorn-reception;The caller wants to speak to someone, or their request doesn't match any other team.;Let me put you through to our office team.
```

Testing and acceptance

Acceptance testing over the phone, phrase by phrase.

Acceptance testing is done over the phone, with the customer, following a list of phrases prepared in advance. It is signed off when every phrase gets the right answer or the right transfer.

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Speech recognition is still sensitive to call conditions. A pause or hesitation in the middle of a sentence can split the request in two, and the agent then answers only the first part. On a very noisy call, the agent may think it heard “goodbye” and hang up.

Run the acceptance test in a quiet place, with one question per sentence, and pass these tips on to the customer.

- ☐ The welcome message is read in full, with the “virtual assistant” mention, in the right language and voice
- ☐ One question per knowledge base topic gets a correct answer, with no transfer
- ☐ One phrase per destination reaches the right service, with the right pre-transfer sentence
- ☐ Two similar services are told apart: prospective tenant and current tenant, school enrolment and a child’s absence
- ☐ On multi-site organisations, the same question asked for two sites gets two different answers
- ☐ An off-topic or ambiguous request leads to a clarifying question, then to reception
- ☐ A “speak to someone” request reaches reception
- ☐ The fallback destination takes the call when the agent is unavailable
- ☐ The end-of-call message is read correctly
- ☐ Usage alerts reach the administrator

Note the answer or destination obtained for each phrase. Fix any gap in the condition or item concerned first, then test again.

Troubleshooting

Common symptoms, their cause and the fix.

Most problems come from the content, not from the technical configuration.

Symptom	Likely cause	Fix
Every call goes to the first destination	Several destinations share the same target	One target per destination; use separate hunt groups
Every call goes to the same destination	Its condition is too broad or lists too many topics	Rewrite it as one short sentence centred on a caller profile
The agent gives a number instead of transferring	A knowledge base item mentions that number	Remove the number from the item, or delete the item
The agent misses an answer that exists	The title doesn’t sound like the question, or the item mixes several topics	Rephrase the title the way a caller would; split the item
Wrong site on multi-site organisations	The item doesn’t name its site	Add the site name to the title and content
Times or amounts mispronounced	Digits or abbreviations in the content	Spell them out
Line rejected on import	Encoding, separator, length, or missing group or user	Check UTF-8 with BOM, semicolons, the 100 and 400-character limits, and create the targets before importing
Calls go to the fallback destination	Minute pack used up, processing timeout reached or agent unavailable	Check the minute gauge in the agent list and the alerts, then add a 500-minute pack

Appendices

Templates to adapt for each customer.

Welcome message templates

Language	Template
French	Bonjour et bienvenue chez [Organisation]. Je suis [Prénom], l'assistante virtuelle de [l'agence / la ville]. [Domaine 1], [domaine 2] ou [domaine 3] : dites-moi ce qui vous amène.
English	Hello, and thank you for calling [Organisation]. I'm [First name], the [agency's / council's] virtual assistant. [Area 1], [area 2] or [area 3]: how can I help?
German	Guten Tag und willkommen bei [Organisation]. Ich bin [Vorname], die virtuelle Assistentin [der Agentur]. [Bereich 1], [Bereich 2] oder [Bereich 3]: Wie kann ich Ihnen helfen?