# Webex CC Admin Quick Reference Guide

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# Creating an Admin

What to do first?

- You need to be a Control Hub Full Admin to continue

Instructions

- On the Control Hub main menu, click Users and find the desired User
- Edit the Admin Roles to have either: Full Admin or Contact Center Service Admin
    - What's the difference?
- Edit the licenses, and check Contact Center > Administrator

    *Note: Administrators cannot be Supervisors*

- Click Save

What to do next?

- See Accessing the Admin Area

Documentation

# Creating an Agent

- On the Control Hub main menu, click Users and find the desired User
- Edit the licenses, and check Contact Center > Standard or Premium Agent
    - What's the difference?
- Click Save
- In the Contact Center Admin area, click Contact Center Users
- Click on the User
- Toggle on the Contact Center setting
- Set Site to Site-1
    - If you've renamed this site, select your site name
- Set Team as desired [see Creating a Team]
- Set Desktop Profile as desired [see Creating Desktop Profiles]
- Click Save

What to do next?

- See Accessing the Agent Desktop

Documentation

# Creating a Supervisor

- Follow the same steps as creating an Agent, with the following modifications:
    - Choose Premium Agent – Supervisor Role for their license

      *Note: Supervisors cannot be Administrators*

    - Under Contact Center Users, set the Primary Team as desired
        - This sets the Layout when they choose Supervisor only role upon logging into the Supervisor Desktop, it does nothing if they choose the Supervisor and Agent role.

[Documentation]()

# Accessing the Admin Area

What to do first?

- See Creating an Admin or Creating a Supervisor

Instructions

- Sign-in to [https://admin.webex.com/](https://admin.webex.com/)
- Admins will click Contact Center on the left navigation menu
- Supervisors will be taken directly to that screen

What to do next?

- See Creating User Profiles

[Documentation]()

# Accessing the Agent Desktop

What to do first?

- See Creating an Agent

Instructions

- Grab the hyperlink from Contact Center Admin Area > Overview > Desktop
- Have Agent login to the Desktop link in their browser

[Documentation]()

# Handling Calls on the Agent Desktop

What to do first?

- See Creating an Agent
- See Accessing the Agent Desktop
- See Creating an Inbound Queue Call Flow

Instructions

- Agent should be in the Available state
- If using the Agent Desktop as the telephony choice, answer calls within the Agent Desktop
- If using a phone as the telephony choice, answer the calls on the phone
- Regardless of telephony choice, perform all mid-call actions (e.g., transfer) on the Agent Desktop

Documentation

## Accessing the Supervisor Desktop

- Follow the same steps as accessing Agent desktop, with the following modifications:
    - After Supervisor login, choose a role:
        - Supervisor
            - Can manage the contact center but cannot take any calls
        - Supervisor and Agent
            - Can manage the contact center and can take calls

Documentation

## Accessing the Reporting Area

Reporting data retention is 13 months.

- Grab the hyperlink from Contact Center Admin Area > Overview > Analyzer
- Have an Admin or Supervisor login to the Analyzer link in their browser

Documentation

## Accessing the Recordings Area

Webex Contact Center comes with basic audio recording out of the box. If you are purchasing an enhanced recording solution, or are using a third party recording solution, this section may not apply to you.

- Grab the hyperlink from Contact Center Admin Area > Overview > Webex Contact Center Management Portal

- Have an Admin or Supervisor login to the Portal link in their browser
- Click on Recording Management on the left-hand navigation

Alternate

- Supervisors can also view and play recordings inside of Supervisor Desktop

Documentation

## Creating a Team

A Team is a group of Agents who you send Queue calls to.  You will require at least one Team, if you wish to perform any kind of ACD call routing.

- Inside the Contact Center Admin Area, click on Teams, Create Team
- Set Name as desired
- Set Site to Site-1
- Set Team Type to Agent Based
- Click Create

What to do next?

- See Creating an Agent
- See Creating a Queue

Documentation

## Creating a Queue

A Queue is a virtual waiting area where you send callers, to be answered by one or more Teams of Agents.

What to do first?

- See Creating a Team

Instructions

- Inside the Contact Center Admin Area, click on Queues, Create Queue
- Set Name as desired
- Set Queue Routing Type as desired
    - If choosing Skill Based, also set Select Agent as desired
- Click Create Group
    - Check the box next to desired Team
    - Click Save
- Set Service Level Threshold as desired

- Set Maximum Time in Queue to 86400 seconds (aka 24 hours)
- Set Default Music in Queue as desired
- Click Create

What to do next?

- If using skills:
    - See Add Prompting and Collecting to a Flow

Prompting refers to speaking instructions to a Caller, whereas collecting refers to receiving input, usually via phone keypad (aka DTMF), from the Caller.

What to do first?

- See Creating an Inbound Queue Call Flow

Instructions for Prompting Only

- Follow Creating an Inbound Queue Call Flow with the following modifications:
    - Drag in a Play Message node, and connect it into the flow where desired
    - If using Audio Prompts:
        - Select your Audio File from the drop down in the properties pane
    - If using Text-to-Speech (TTS):
        - Toggle on the TTS setting in the properties pane
        - Click Add Text-to-Speech Message button
        - Type out your message
        - Click the trash icon next to the Audio File input above your message

Instructions for Prompting and Collecting

- Follow Creating an Inbound Queue Call Flow with the following modifications:
    - Drag in a Menu node, and connect it into the flow where desired
    - If using Audio Prompts:
        - Select your Audio File from the drop down in the properties pane
    - If using Text-to-Speech (TTS):
        - Toggle on the TTS setting in the properties pane
        - Click Add Text-to-Speech Message button
        - Type out your message
        - Click the trash icon next to the Audio File input above your message
    - Click to enable Make Prompt Interruptible
    - Under Custom Menu Links click Add New to add the desired menu options
        - Set the Digit Number equal to the keypress the Caller will make
        - Set the Description to a desired name matching the menu choice
    - Connect the menu outputs on the flow canvas to the correct destinations
        - Timeout can be connected to a default menu option
        - Unmatched can be connected back to the menu itself

No supporting documentation

# Add Queue Hold Message to a Flow

What to do first?

- See Creating an Inbound Queue Call Flow
- See Uploading Audio Prompts

Instructions

- Follow Add Prompting and Collecting to a Flow with the following modifications:
    - Connect the Play Message node after the Queue Contact node
    - Configure the Audio File or TTS message to inform the Caller of their queued status

What to do next?

- See Add Queue Music on Hold to a Flow

No supporting documentation

# Add Queue Music on Hold to a Flow

What to do first?

- See Creating an Inbound Queue Call Flow
- See Uploading Audio Prompts
- See Add Queue Hold Message to a Flow

Instructions

- Follow Creating an Inbound Queue Call Flow with the following modifications:
    - Drag in a Play Music node, and connect it after the Queue Contact node
    - Select the Audio File from the drop down in the properties pane
    - Configure the music duration you desire
    - Connect the output of Play Music back to the Play Message node, which plays your Queue Hold Message

No supporting documentation

    - Creating Skills
    - See Assigning Skills to Agents
    - See Assigning Skills to Callers
- See Creating an Inbound Queue Call Flow

[Documentation]

# Creating an Inbound Queue Call Flow

An inbound queue call flow is how you connect your Callers to your Agents.

What to do first?

- See Creating an Agent
- See Creating a Team
- See Creating a Queue

Instructions

- Inside the Contact Center Admin Area, click on Flows, Manage Flows, Create Flows
    - Click Start Fresh
    - Set Name as desired
    - Click Create Flow
        - Drag a Queue Contact node onto the canvas
            - Pick desired Queue from drop down in the properties pane
            - Connect the Green Start Flow node to Purple Queue Contact node
        - Drag an End Flow node onto the canvas
            - Connect the Purple Queue Contact node to the Red End Flow node
        - Enable Validation
        - Click Publish Flow in the lower right
        - Click Publish Flow in the pop-up window
        - Close Browser Tab

What to do next?

- See Creating an Entry Point
- See Handling Calls on the Agent Desktop
- See Assigning Business Hours to a Flow
- See Add Queue Hold Message to a Flow
- See Add Queue Music on Hold to a Flow

[Documentation]

# Creating an Entry Point

An Entry Point is how you associate a phone number with a call flow.

What to do first?

- Requires one unassigned number under: Control Hub > Calling > Numbers
- See Creating an Inbound Queue Call Flow

Instructions

- Inside the Contact Center Admin Area, click on Channels, Create Channel
- Set Name as desired

- Set Channel Type to Inbound Telephony
- Set Service Level Threshold as desired
- Set Routing Flow as desired
- Set Version Label to Latest
- Set Music on Hold as desired
- Under Support Number, Click Add
    - Set Webex Calling Location as desired
    - Set Support Number as desired
    - Click Checkmark
- Click Create

What to do next?

- See Handling Calls on the Agent Desktop

## Creating Business Hours, Holidays and Overrides

Business Hours, Holidays and Overrides are how you define your working and non-working hours. While Business Hours are based on daily shift schedules, holidays are full day events, and overrides are either full or partial day events. Based on the Flow programming, you get to decide what happens to the Caller experience during each of these events.

- Inside the Contact Center Admin Area, click on Business Hours, Create Working Hours
- Set Name as desired
- Set Timezone as desired
- Click Add Shift
    - Set Name as desired
    - Set Days of Week and Start and End Time as desired
    - Click Save
- Click Create
- Select Holiday Lists, Create Holiday List
    - Set Name as desired
    - Add holiday names and durations (aka dates) as desired
        - Click the checkmark to confirm date
        - Click Add More Holidays to add more
    - Click Create
- Select Overrides, Create Overrides
    - Set Name as desired
    - Set Timezone as desired
    - Click Add new override
        - Set Name as desired
        - Set duration (date and time span) as desired
        - Toggle Status on

        - Click checkmark to confirm date/time
    - Click create
- Go back to Business Hours, Click your Business Hours
    - Scroll down and set Holiday List and Override as desired
    - Click Save

What to do next?

- See Assigning Business Hours to a Flow

Documentation

## Assigning Business Hours to a Flow

What to do first?

- See Creating Business Hours, Holidays and Overrides
- See Creating an Inbound Queue Call Flow

Instructions

- Follow Creating an ACD Call Flow with the following modifications:
    - Drag in a Business Hours node, and connect it into the flow where desired
    - Select the Business Hours from the drop down in the properties pane
    - Connect the Working Hours output to the Queue Contact node
    - Drag in a Blind Transfer node and set the destination to a voice mailbox
    - Connect the Holidays, Override and Default to the Blind Transfer node

No supporting documentation

## Uploading Audio Prompts

Audio Prompts are pre-recorded WAV files with either messages or music in them.

- Inside the Contact Center Admin Area, click on Audio Prompts, Create Audio Prompt
- Click Choose a file and browse your computer for the audio file desire
- Click Create

What to do next?

- Repeat for additional audio prompts

Documentation

# Add Prompting and Collecting to a Flow

Prompting refers to speaking instructions to a Caller, whereas collecting refers to receiving input, usually via phone keypad (aka DTMF), from the Caller.

What to do first?

- See Creating an Inbound Queue Call Flow

Instructions for Prompting Only

- Follow Creating an Inbound Queue Call Flow with the following modifications:
    - Drag in a Play Message node, and connect it into the flow where desired
    - If using Audio Prompts:
        - Select your Audio File from the drop down in the properties pane
    - If using Text-to-Speech (TTS):
        - Toggle on the TTS setting in the properties pane
        - Click Add Text-to-Speech Message button
        - Type out your message
        - Click the trash icon next to the Audio File input above your message

Instructions for Prompting and Collecting

- Follow Creating an Inbound Queue Call Flow with the following modifications:
    - Drag in a Menu node, and connect it into the flow where desired
    - If using Audio Prompts:
        - Select your Audio File from the drop down in the properties pane
    - If using Text-to-Speech (TTS):
        - Toggle on the TTS setting in the properties pane
        - Click Add Text-to-Speech Message button
        - Type out your message
        - Click the trash icon next to the Audio File input above your message
    - Click to enable Make Prompt Interruptible
    - Under Custom Menu Links click Add New to add the desired menu options
        - Set the Digit Number equal to the keypress the Caller will make
        - Set the Description to a desired name matching the menu choice
    - Connect the menu outputs on the flow canvas to the correct destinations
        - Timeout can be connected to a default menu option
        - Unmatched can be connected back to the menu itself

No supporting documentation

# Add Queue Hold Message to a Flow

What to do first?

- See Creating an Inbound Queue Call Flow

- See Uploading Audio Prompts

Instructions

- Follow Add Prompting and Collecting to a Flow with the following modifications:
    - Connect the Play Message node after the Queue Contact node
    - Configure the Audio File or TTS message to inform the Caller of their queued status

What to do next?

- See Add Queue Music on Hold to a Flow

No supporting documentation

# Add Queue Music on Hold to a Flow

What to do first?

- See Creating an Inbound Queue Call Flow
- See Uploading Audio Prompts
- See Add Queue Hold Message to a Flow

Instructions

- Follow Creating an Inbound Queue Call Flow with the following modifications:
    - Drag in a Play Music node, and connect it after the Queue Contact node
    - Select the Audio File from the drop down in the properties pane
    - Configure the music duration you desire
    - Connect the output of Play Music back to the Play Message node, which plays your Queue Hold Message

No supporting documentation

# Creating Skills

Skill Definitions are single attributes which describe what an Agent can do for our callers. Skill Profiles are bundles of these definitions, which we use to assign to Agents, and describe their characteristics accurately.

- Inside the Contact Center Admin Area, click on Skill Definitions, Create Skill Definition
    - Set Name as desired
    - Set Type as desired
    - Click Create
- Inside the Contact Center Admin Area, click on Skill Profiles, Create Skill Profile
    - Set Name as desired

- Check the box next to all desired skills for this profile
- Click Create

[Documentation](#)
[Documentation](#)

## Assigning Skills to Agents

- See Creating Skills
- Inside the Contact Center Admin Area, click on Contact Center Users
- Click on the User
- Set the Skill Profile as desired

No supporting documentation

## Assigning Skills to Callers

What to do first?

- See Creating Skills
- See Assigning Skills to Agents
- See Creating a Queue

Instructions

- Follow Creating an Inbound Queue Call Flow with the following modifications:
  - In the properties pane of the Queue Contact node, select the required skill(s) to attach to the Caller.

No supporting documentation

## Creating User Profiles

User profiles describe a User's access to the system.

What to do first?

- See Creating an Agent
- See Creating a Supervisor
- See Creating an Admin

Instructions

- Inside the Contact Center Admin Area, click on User Profiles, Create User Profile
- Set Name as desired
- Set Profile Type as desired

- Click Next
- If Admin or Supervisor: Set Manage Access as desired
    - For View and Edit, check the boxes next to features desired
    - Click Next
- If Admin or Supervisor: Set Call Routing as desired
    - For View and Edit, check the boxes next to features desired
    - Click Next
- Set Desktop Experience settings as desired
- Click Next
- Set Access Rights for Entry Points, Queues and Teams as desired
- Click Create

Documentation

## Assigning User Profiles to Users

What to do first?

- See Creating User Profiles

Instructions

- Inside the Contact Center Admin Area, click on Contact Center Users
- Click on the User
- Set the User Profile as desired

No supporting documentation

## Creating Idle/Wrap-up Codes

Idle codes are the reasons why an Agent cannot take a call (e.g., lunch break), while wrap-up codes help classify why Callers call into your business (e.g., complaints).

- Inside the Contact Center Admin Area, click on Idle/Wrap-up Codes
- Click Create Idle/Wrap-up Code
- Set Name as desired
- Set Make it default as desired
- Set Code Type as desired

What to do next?

- See Creating Desktop Profiles

Documentation

# Creating Desktop Profiles

Desktop Profiles describe how the Agent and Supervisor Desktops function for your employees.

- Inside the Contact Center Admin Area, click on Desktop Profiles
- Create Desktop Profile
- Set Name as desired
- Set Parent Type to Site-1
- Click Next
- Set Wrap-up to manual or automatic (with timer and optional extension)
- Set Wrap-up codes as desired
- Set Idle codes as desired
- Click Next
- Skip Collaboration, Click Next
- Skip Dial Plans, Click Next
- Skip Voice Channel Options, Click Next
- Toggle on Agent Statistics
- Set Queue Statistics as desired
- Toggle on Logged-in team statistics
- Set Team statistics as desired
- Click Next
- Skip Desktop Timeout, Click Create

What to do next?

- See Controlling Desktop Statistics Visibility
- See Enabling Outdial on the Desktop

Documentation

# Controlling Desktop Statistics Visibility

- See Creating User Profiles
  - Use Access Rights as a filter
- See Creating Desktop Profiles
  - Use Queue Statistics and Team Statistics as a filter

No supporting documentation

# Enabling Outdial on the Desktop

Outdial is when an Agent needs to call a customer back as a follow-up or outreach action.

- Follow Creating a Queue with the following modifications:
    - Switch from Inbound Queue to Outdial Queue
- Follow Creating an Inbound Queue Call Flow with the following modifications:
    - Only connect an End Flow node to the Start Flow node (2 nodes in total)
- Follow Creating an Entry Point with the following modifications:
    - Switch from Inbound Telephony to Outbound Telephony
    - Set Outdial Flow as desired
    - Set Outdial Queue as desired
- Follow Creating Desktop Profiles with the following modifications:
    - Under Dial Plans
        - Toggle on Outdial
        - Set Outdial Entry Point as desired
        - Toggle on Dial Plan
        - Set Select Dial Plan to US

No supporting documentation