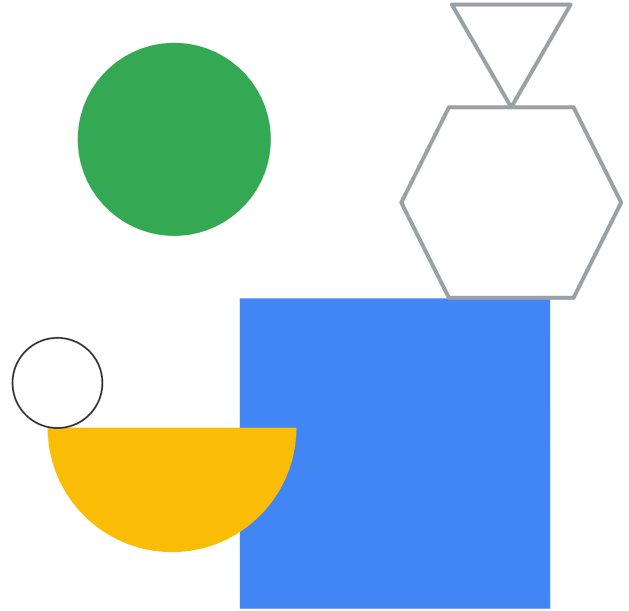


Getting started with CCAIP

Admin Training



Objectives

- 01 Review different user personas on CCAIP
- 02 Setting up your account
- 03 Log into the system and establish browser settings.
- 04 Adjusting personal and global profile settings
- 05 Access the platform's technical documentation



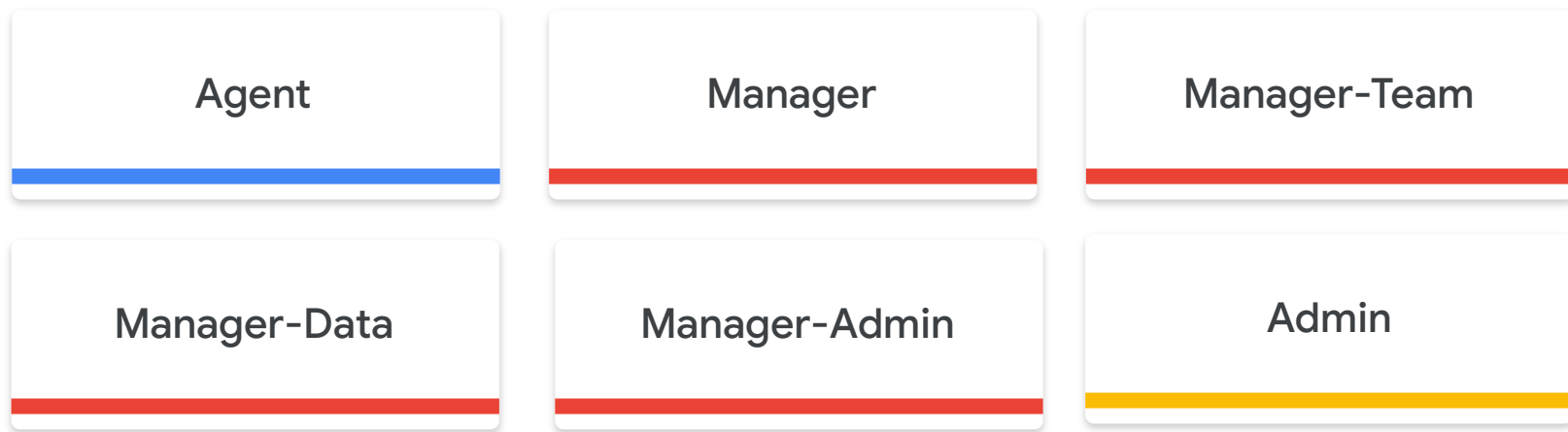
A blue square containing the white text '01' in the bottom-left corner. To the right of the square is a yellow triangle pointing downwards.

01

Review different user
personas on CCAIP

User roles and permissions

- Roles define your configuration, monitoring, and reporting access within CCAIP.
- There are six predefined roles:



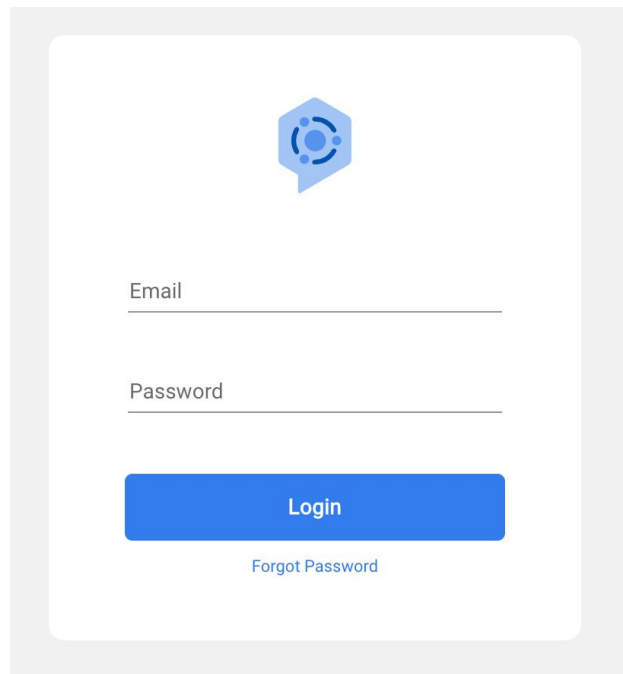
- Users can be assigned multiple roles to have a combination of accesses.
- Custom roles can be created.




Setting up your account in
CCAIP

Account setup

- Create your own CCAIP tenant/environment and then you will be added as an admin. From there, add your implementation team and other colleagues with appropriate roles.
- You will receive a welcome email.
- Select the link to create your password and activate your account.
- Passwords should be at least 10 characters long, include capital letters, and special characters.
- Upon activation, you will be taken to the CCAIP portal.

A screenshot of a login form for the CCAIP portal. The form is white with rounded corners and is set against a light gray background. At the top center is a blue hexagonal logo with a white circular icon inside. Below the logo are two input fields: the first is labeled "Email" and the second is labeled "Password". Both labels are in a small, gray font and are positioned to the left of their respective input lines. Below the password field is a blue rectangular button with the word "Login" in white text. At the bottom of the form, centered, is a link that says "Forgot Password" in a small, blue font.



Email

Password

[Login](#)

[Forgot Password](#)

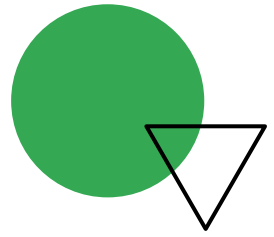


03



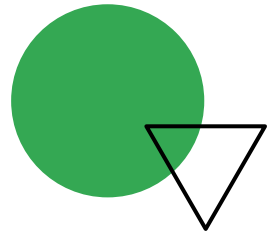
Log in to the system and
establish browser settings

Logging in via CRM



Most agents will utilize the CRM to access the adapters. In addition, it's important for admin and managers to have access to the CRM for consumer records. While you as the admin can log into the CRM to use the call/chat adapters for escalations as well as reviewing records, you will typically log into CCAIP through the portal to do your admin maintenance and configurations.

Logging in



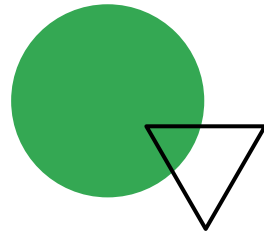
Via platform:

Navigate to your company's CCAI Platform page. Enter your admin email address and password on the sign-in page and click login.

Via SSO:

Navigate to your company's CCAI Platform page. Click the "Sign in with SSO" button will be shown if you are using SAML SSO. Enter your credentials and login. If you use Google, the log in text may vary.

Browser settings



Prerequisites

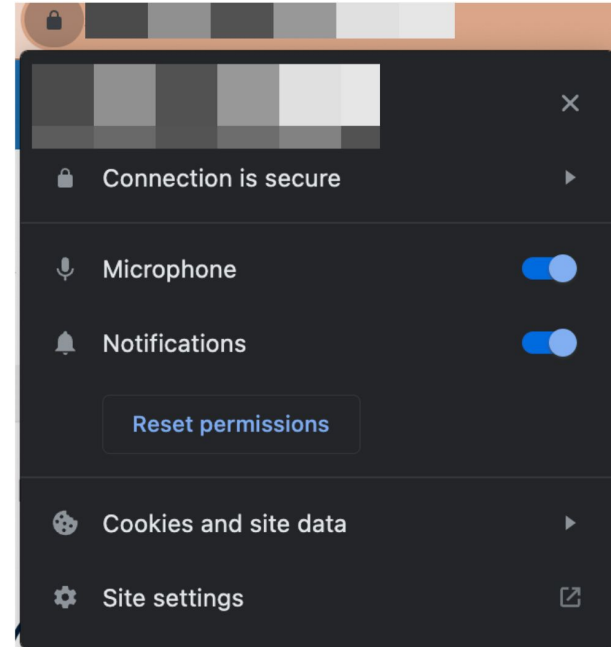
- Google Chrome browser is up to date

Best practices

- Disable ad blockers
- Do not use full-screen mode in Chrome as it will disable browser notifications
- Utilize the “Forgot Password” button to send an email for password change instructions to your agent email address

Browser settings

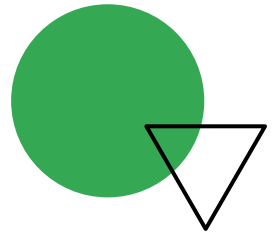
- On the left side of the browser window, click view site information (padlock icon).
- Toggle the **Microphone** button to the on position to enable microphone use to talk to customers.
- Toggle the **Notifications** button to the on position to enable desktop notifications for incoming calls, chats, and voicemails.





Adjusting personal and global
profile settings

Personalize your account




- You can personalize your profile information so that the image and first name shown to consumers during support interactions are unique to you.
- Navigate to **Admin > My Profile** to upload a profile picture.
- Edit your first and last name.
- You can also verify and change your password in this area of the platform.
- Click **Update** to save all changes.

Controlling profile settings for all users

- As admin, you control how all other users personalize their accounts.
- Navigate to **Settings > Operation Management** and scroll to the **Default Avatar** section (pictured).
- You can upload a PNG or JPG file that will be the default avatar.
- If you check the box that says, “**Overwrite all other uploaded Avatars with Default,**” then agents will not be able to upload their own profile pictures.
- While this setting is typically set once during implementation, you can come modify this at any time. (ex. If your company logo or branding changes.)

Default Avatar

Upload Default Avatar



Upload a PNG or JPG that is 512px square or larger

Choose File | No file chosen

☐ Overwrite all other uploaded Avatars with default?

Save Avatar Setting

A blue square containing the white text '05' in the bottom-left corner. To the right of the square is a yellow triangle pointing to the right.

05

Accessing CCAIP
Technical
Documentation

Documentation and release notes

To access documentation and release notes for CCAIP please access the link below:

<https://cloud.google.com/contact-center/ccai-platform/docs>