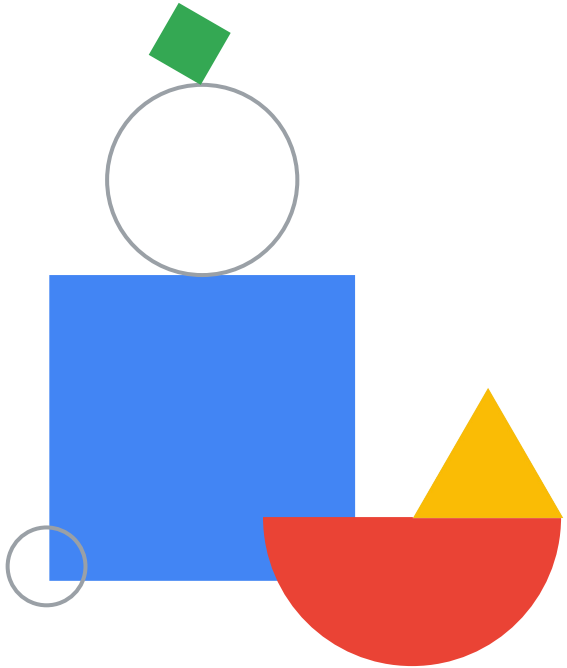
Integrations Part II



Admin Module

Objectives

01 Third Party / native tool integrations

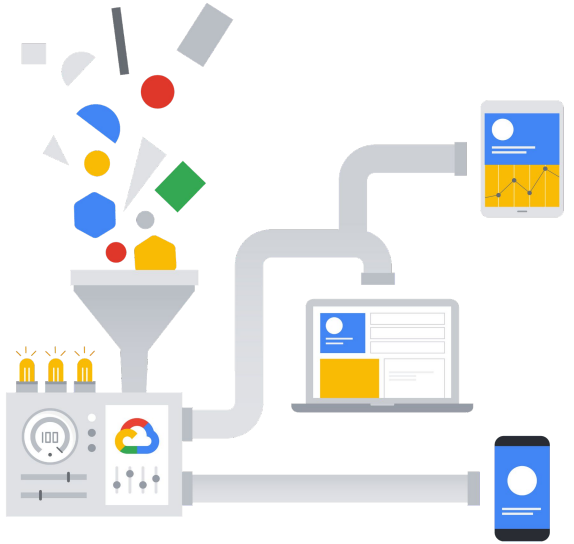
02 APIs

Third-party / native tool integrations

Overview

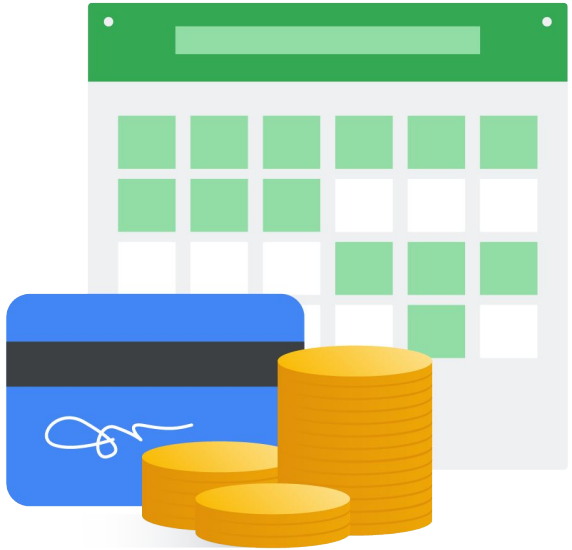
CCAIP can integrate with many different third party and native tools. Each of these can be used to help run your contact center to its full capability. Some of the tools CCAIP can integrate with include:

- WFM
- QM
- Outbound Dialers
- Secure Payments
- MS Teams



Third Party Integrations

- Workforce Management (WFM)
  - WFM is a tool that you use to help ensure staffing needs are appropriately met based on expected volume.
  - With CCAIP, you can partner with a third-party WFM system.
- QM
  - The QM provider is responsible for the set up and integration to ingest an export of data. See the support documentation for details on a data export for QM purposes
- Outbound Dialer (OB)
  - CCAIP has a native dialer (the Campaigns feature) you may opt to use or you can use a third-party dialer. Please speak to your implementation team or partner for more information.

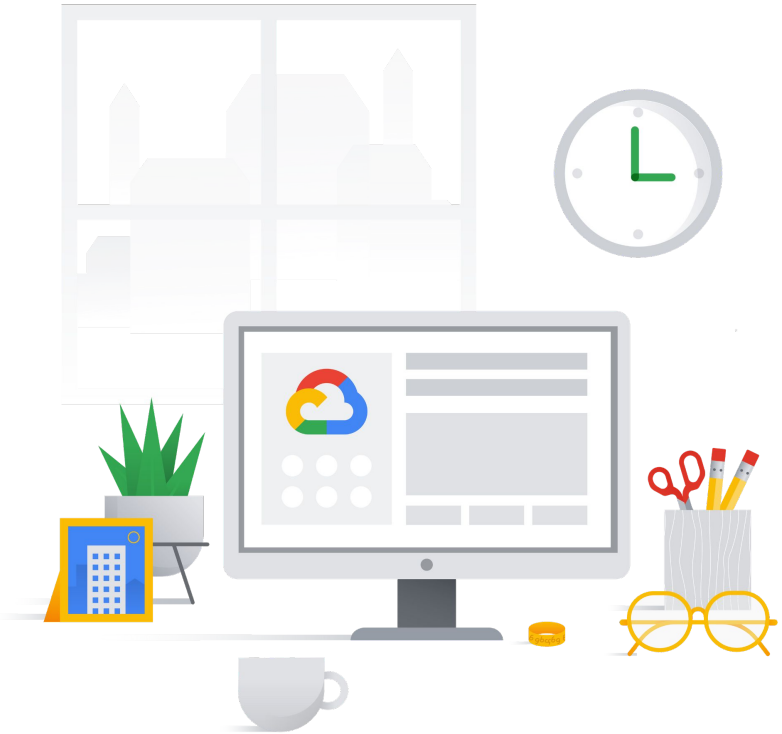


Secure Payments

CCAIP integrates with a few payment providers.

These integrations are specifically for payment processing. The agent enters a description, a currency type, and the amount before sending the end user off to the cloud to provide the payment details. In each instance, agents will see progression of where the end user is in the payment journey until they are brought back to the agent.

Depending on the service provider you choose, please review this support page.



Microsoft (MS) Teams overview

CCAIP integrates with MS Teams to allow for agents to route transfers to users on MS Teams or to route calls to agents in MS Teams. An example of how this could be used in your contact center is if you have some internal teams using CCAIP and some that have not yet moved to CCAIP and those users are leveraging Teams. The integration allows for easily transferring calls from CCAIP to MS Teams.

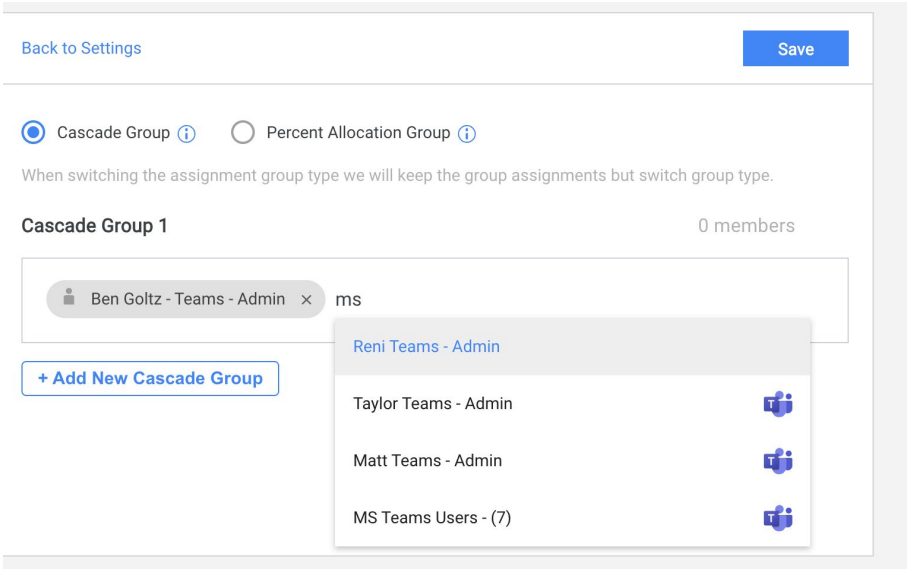
The following slides contain the steps to create a user for MS Teams via the CCAI Platform. As an admin leveraging MS Teams, you will create users and assign them as-needed.

Step one - set up

- The first step is to create a user as you normally would in CCAIP.
    - Check the box in the user profile that says “external UCaaS user” This will provide a place to put the users MS Teams SIP URI and username.

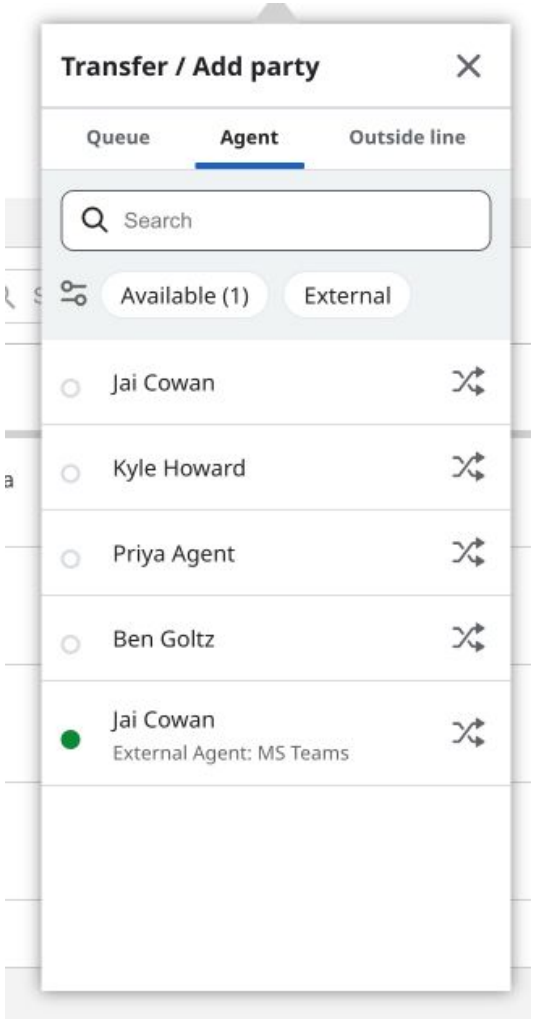
Step two - assign

- Assigning a Teams user to a queue
  - You as the admin or a manager can assign an MS Teams user to a queue just as you would any CCAIP user.
  - As long as the MS Teams user is available in MS Teams, they can get a call routed to them just as a CCAIP user could.
  - When assigning users, if they are an MS Teams user it will be depicted by the MS Teams logo.



Step three - utilize

- Transferring to a Teams user:
    - During an interaction, if a CCAIP user needs to transfer to an MS Teams user, they will be able to see the specific users as an MS Teams user they can transfer to.
    - When selecting transfer, the Agent can choose to only see external users available for transfer or can see all users for transfer.



APIs

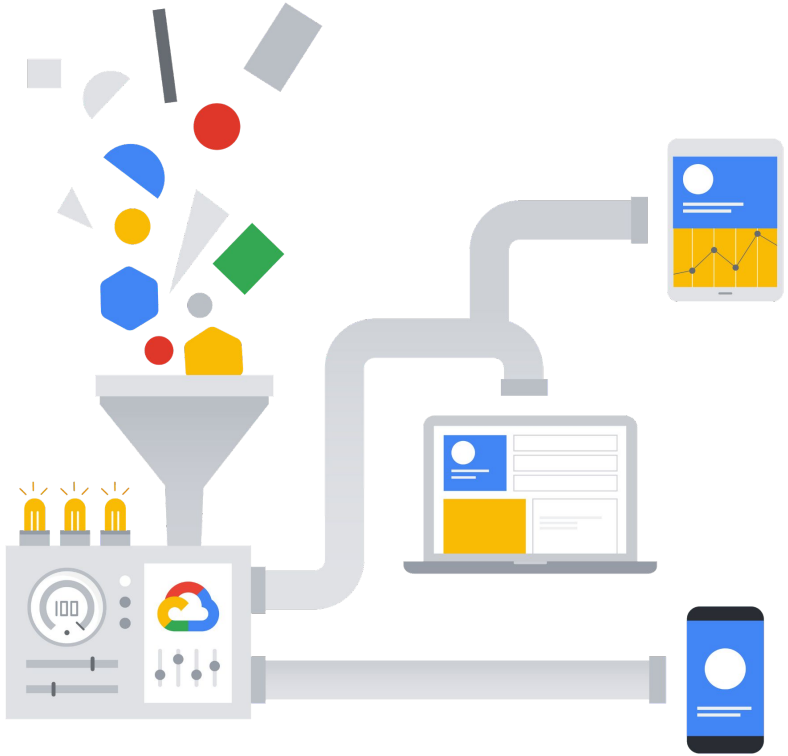
API Overview

CCAIP currently has two API collections:

- Apps API
- Manager API

The documentation can be imported into an API management tool such as Postman.

The Manager API has a group of endpoints that will return metadata on interactions, agents, and queues. This is the API you would use when connecting to your own BI tool and/or when accessing detailed data. An example use case would be using the agent endpont to return info about an agent such as the roles they are assigned, what status they are is currently in, team assignments, last login time, etc.



Apps API

The Apps API is used for executing a task

- An example of how you might use this is if you want to bulk upload your users, you can do so via the Apps API.
- You can set up an automation via the API to add or deactivate users.
- You can also use the Apps API to call on the estimated wait time (EWT) for a particular queue from a VA so that they can provide the EWT before escalating to a human agent.
- Endpoints in Apps API are also used for sending sessionless outbound SMS messages.