Webex Contact Center

Admin/Supervisor Training

Customer Solution Assurance Team

[PRESENTER]

[DATE]

Supervisor Agenda

- **WxCC Overview**
  - What it does?
  - Different portals

- **User enrollment**
  - Add/Delete users
  - Licenses and administrator roles

- **Provisioning**
  - Provisioning framework
  - Teams
  - User profiles
  - Agent profiles
  - Multimedia profiles
  - Aux codes(wrap up and idle)
  - Skills

- **Routing Strategies, Flows and Resources**
  - Audio files
  - Flows
  - Routing Strategies

- **Advanced Provisioning**
  - Dashboard
  - Call monitoring
  - Call recording

- **Q&A**

WxCC Overview

What does Webex Contact Center do?

- For the caller
  - Call routing based on menu prompts and selections
  - Call queuing and distribution

- For the agent
  - Call management (hold, consult, conference and transfer)
  - Make calls (out)
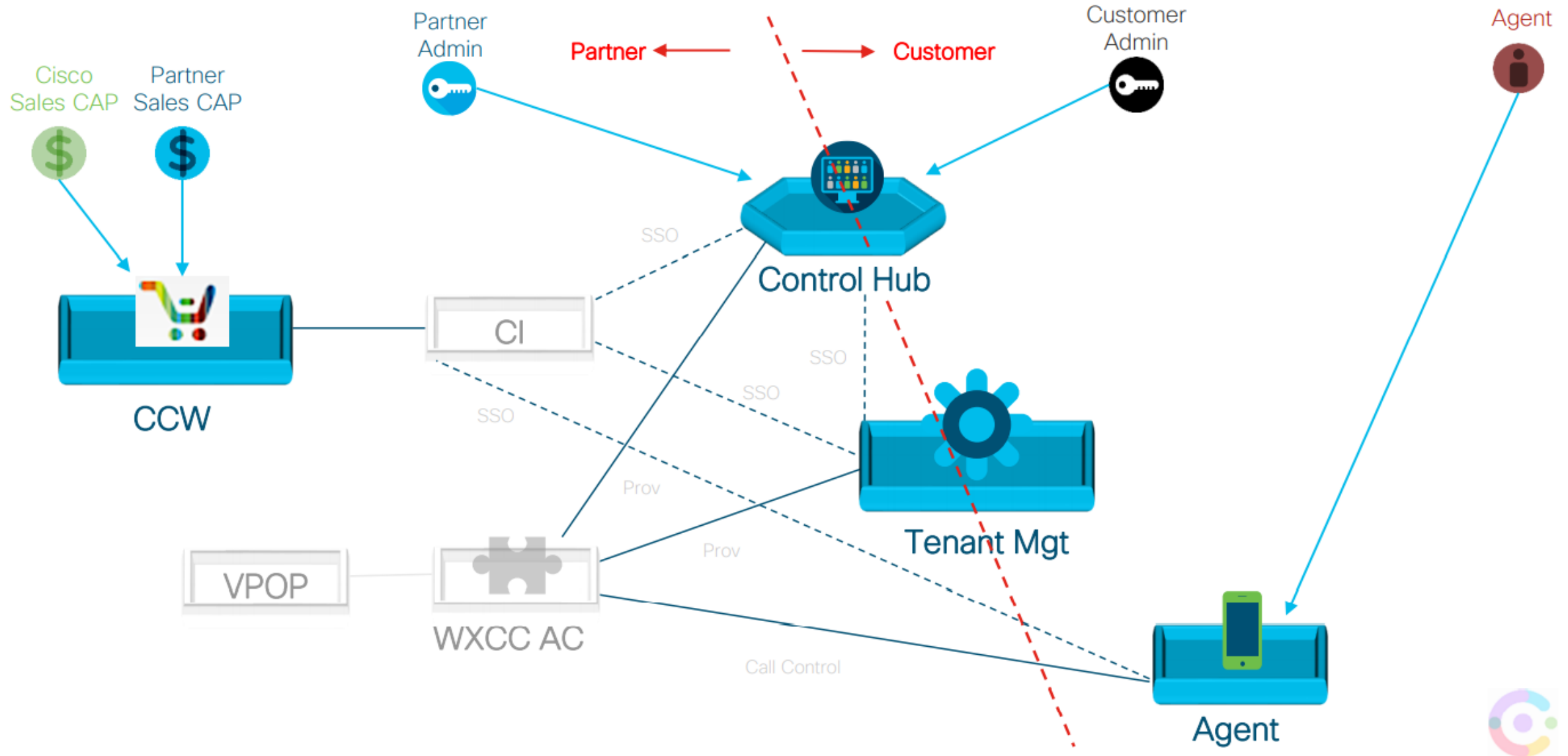 - Agent state management (available, break, etc.)
  - Personal statistics

- For the system administrators
  - ACD administration
  - Access control rights
  - Agent provisioning

- For the management team (supervisors)
  - Call monitoring
  - Call recording
  - Real-time reports
  - Historical reports

Portal Architecture with Roles

Access URLs

Production URLS (depends on the AppCenter):
Control Hub: https://admin.webex.com/
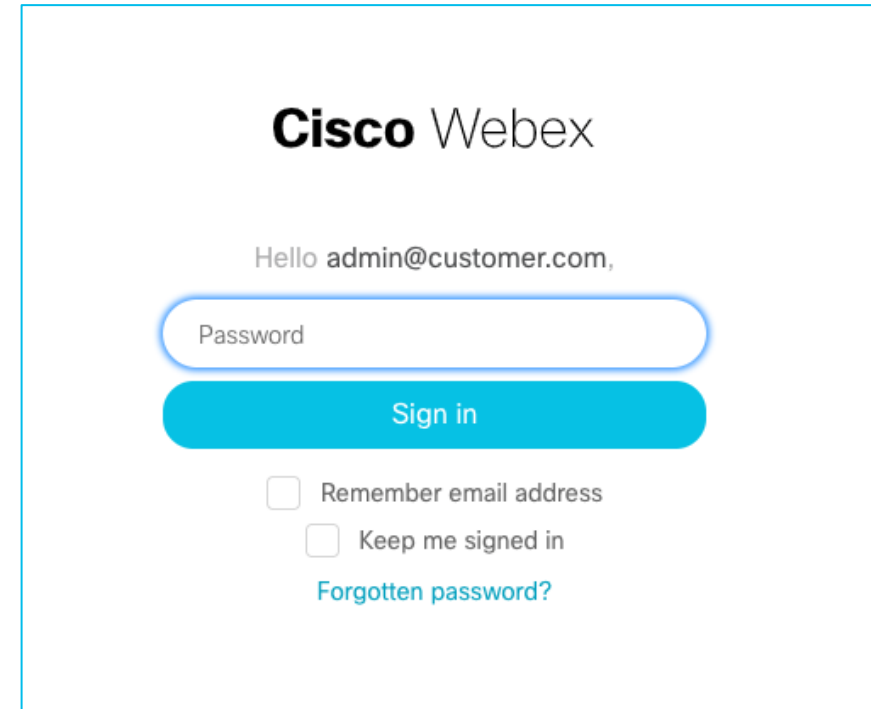*Management Portal: https://portal-v2.wxcc-eu1.cisco.com/
**Agent Desktop: https://desktop.wxcc-eu1.cisco.com/

*Agents have a restricted view
**You need to have the Contact Center enabled for your user
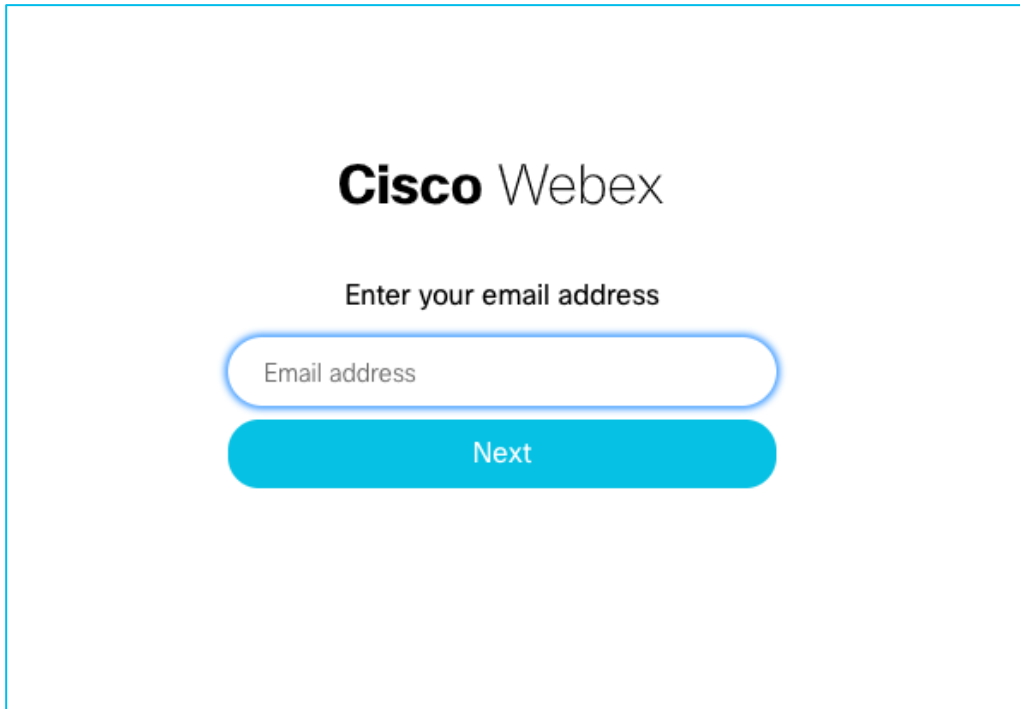
Control Hub

Management Portal
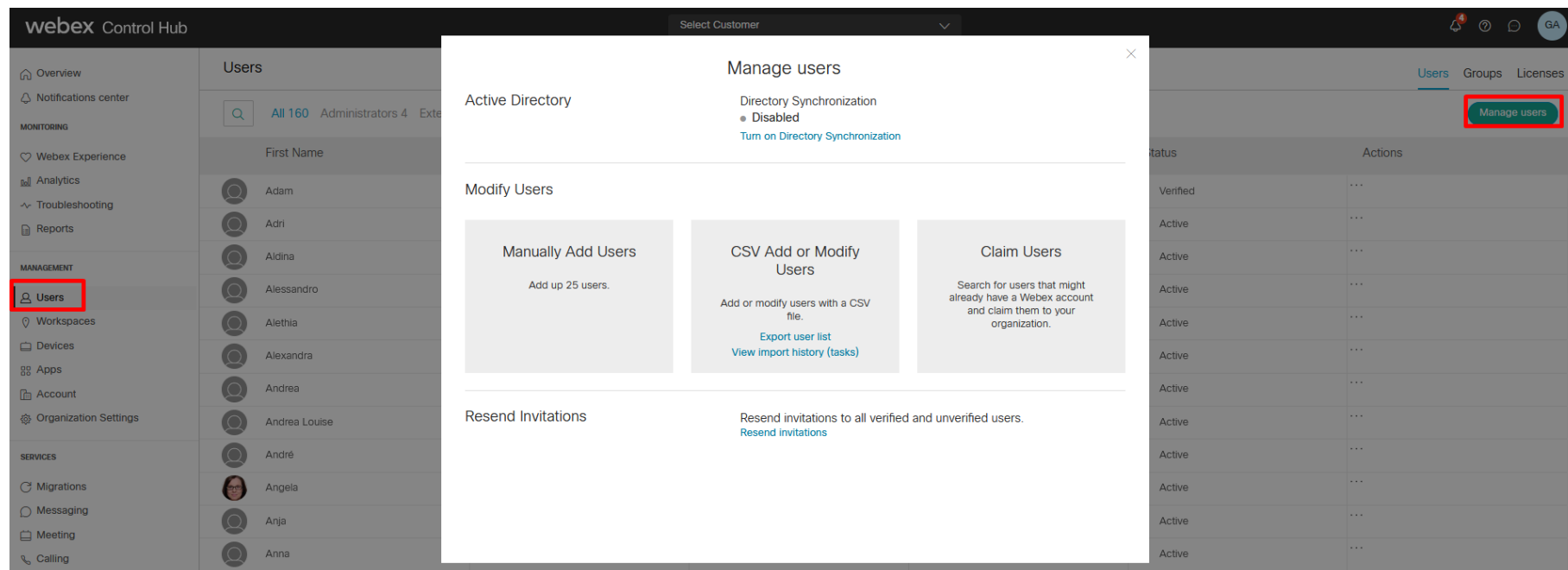
Agent Desktop

User enrollment

Add/Delete Users

- Users must be added/deleted in **Control Hub**
  - After deleting the user, the system will put that user in "InActive" status, but will not disappear from the system
  - Will synchronize to the WxCC admin portal
- User profile and agent profile can be modified as well as assignment of team and any skill profile → In the Management Portal

✓ **Manually**: Add users mail   ✓ **Bulk**: Upload CSV files with data and services

Licenses

Messaging	Meeting	Calling	Contact Center
Free Public Collaboration Services			
Basic Messaging	Basic Space Meetings	Call on Webex (1:1 call, non-PSTN)	None
Licensed Collaboration Services			
Messaging ☑ Advanced Messaging	Meetings ☐ Advanced Space Meetings ☐ Webex Meetings Suite ccentralen.webex.com		Customer Care ☑ Contact Center Assign License Type ⓘ ◉ Premium Agent Select User Role ○ Agent ○ Supervisor ◉ Administrator ○ Standard Agent

Add Users

✓

1	0	0
1 New user	0 Updated users	0 Errors

1 Total records processed

Finish

✓ Webex Teams service needs to be enabled because chat feature uses the Webex Teams Infrastructure

✓ Select the appropriate agent license under 'Contact Center' card

✓ Select 'Finish'

User Status

✓ User Status will be 'Not Verified' → Will change to 'Active' once the user verification/activation is completed

✓ Customer admin has an option to resend the invitation

✓ Customer admin also has the option to deactivate or delete the user in this status

Password setup

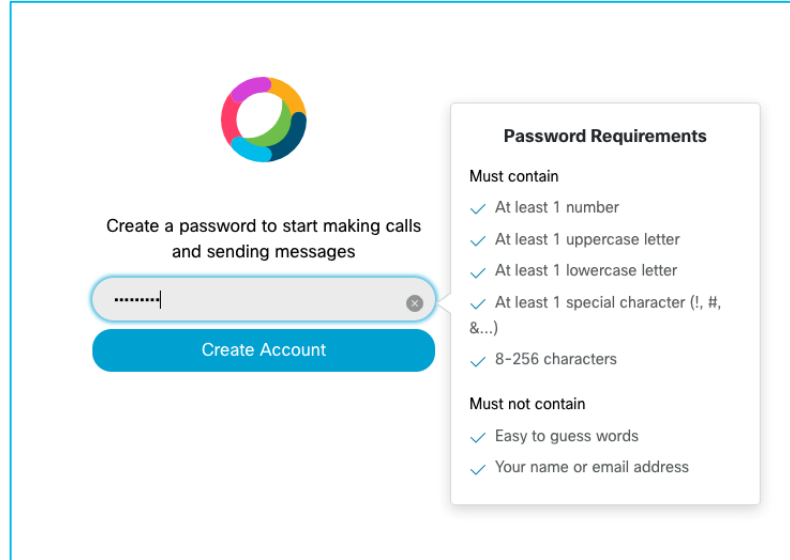adminuser is waiting to collaborate with you on Cisco Webex Teams.

Hi colleague,

Webex Teams is the fastest way to join your Webex meetings. It is your team's business messaging app, conferencing solution, and phone system all in one.

adminuser wants you to join Cisco Webex Teams and start connecting right away.

Join adminuser now

The Webex team
Need help? Contact us.

Create a password to start making calls and sending messages
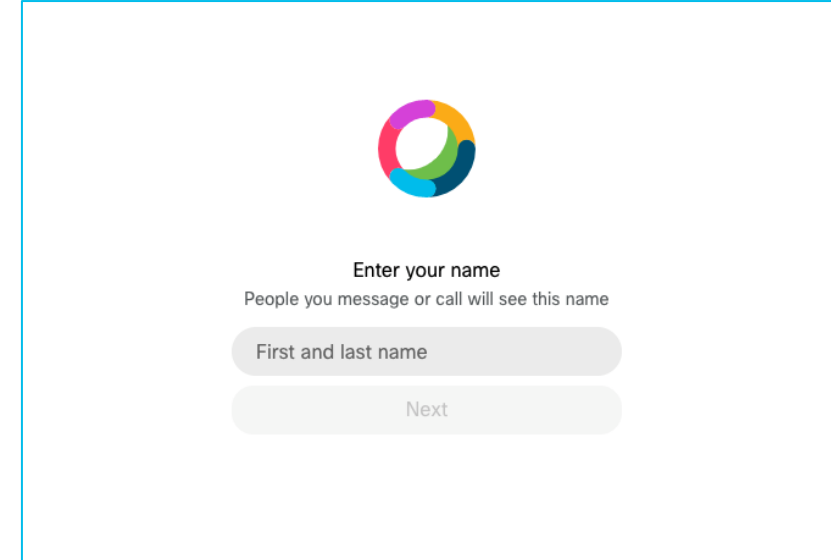
Create Account

Password Requirements

Must contain
- At least 1 number
- At least 1 uppercase letter
- At least 1 lowercase letter
- At least 1 special character (!, #, &...)
- 8-256 characters

Must not contain
- Easy to guess words
- Your name or email address

Enter your name
People you message or call will see this name

First and last name

Next

✓ End customer to complete enrollment using the activation link received in mail.

✓ Set password as per requirements

✓ Set First and last Name and select 'Next'

Administrator Roles

✓ Select 'Edit' under services to change Webex services for a user

✓ Roles & Responsibilities – Assign the "Full Administrator" role for being able to edit everithing.

Provisioning

List of settings
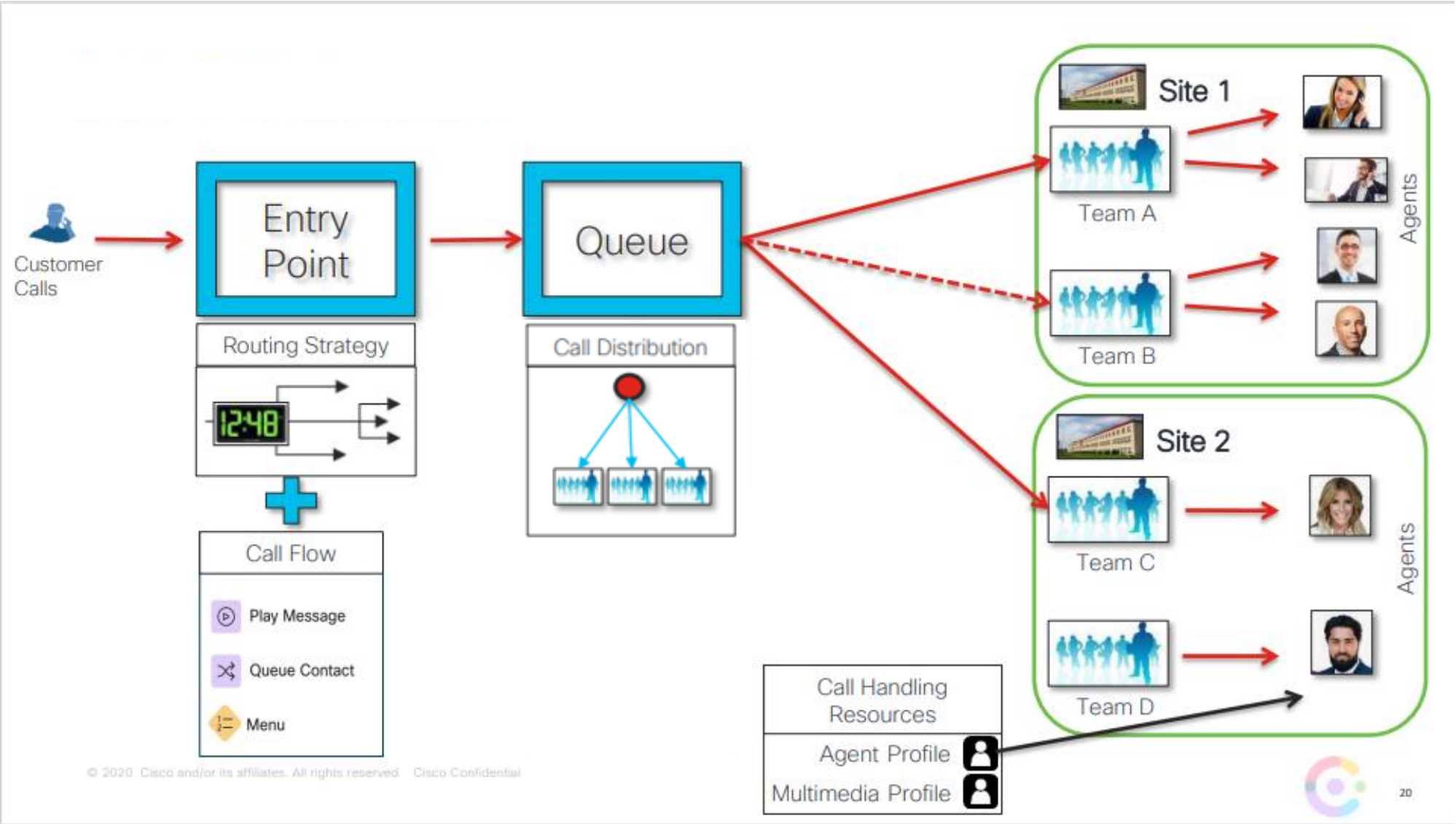
Basics
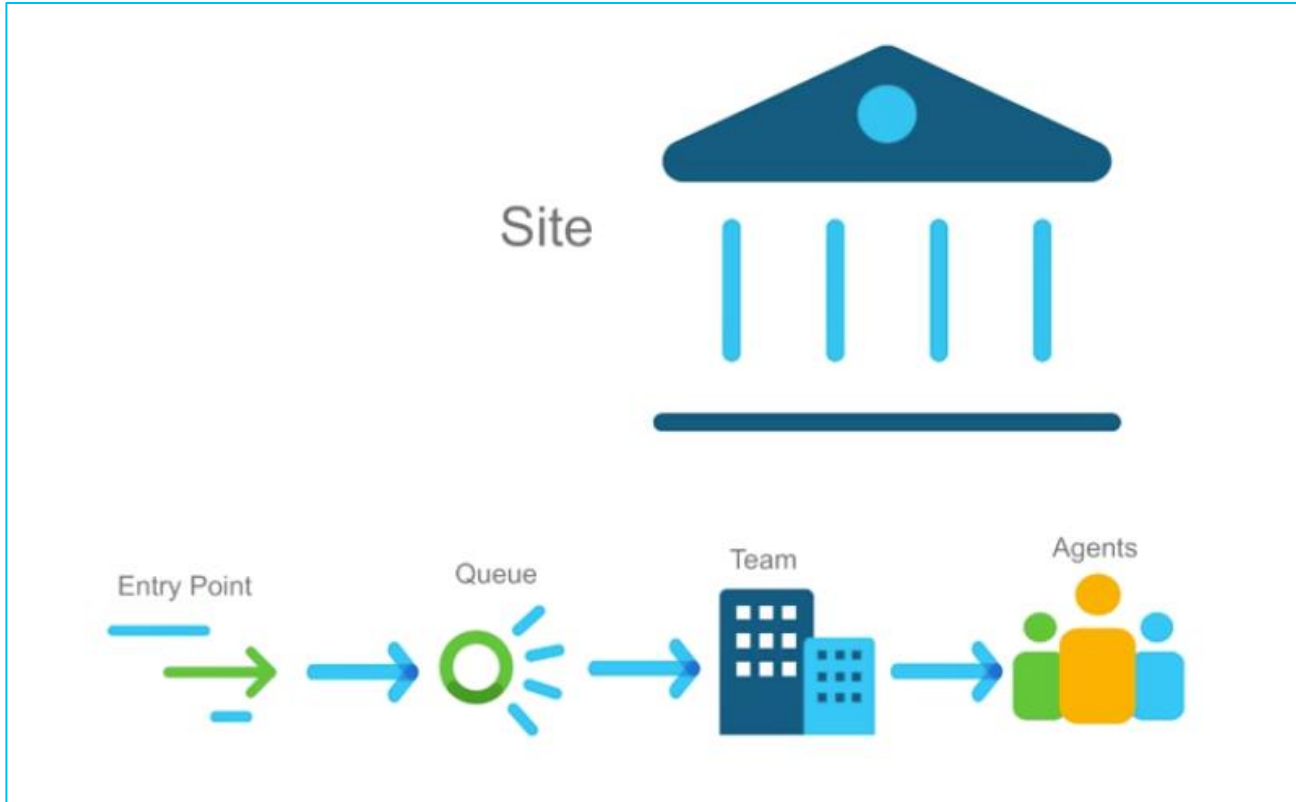
- ✓ An 'Entry Point' is the initial landing place for customer call

- ✓ A 'Queue' is where active calls are stored before being connected to Teams and Agents

- ✓ A 'Team' is a group of Agents at a specific site who handles calls

- ✓ An 'Agent' is the person at the end of the call flow who is handling the call

- ✓ A 'Site is a physical Contact Centre location under control of the Tenant.

- ✓ Teams shall be provisioned under Sites. Sites are not used for Routing Strategies but they can be used to run specific reports.

- ✓ Every single inbound call will consist of at least one Entry Point and one Queue

- ✓ Entry Point Mapping: DN (where customers will make the calls) associated with an Entry Point

Teams

- Calls in queues are distributed to teams
  - Specific queue can be routed to one or more teams
  - Routing strategy determines which the grouping, order, and timing of team distribution
  - Calls can be distributed to agents in a team based on **longest available**, **skills based, load based or priority based**.

- Types of teams:
  - <u>Agent-based</u>
    - Composed of agents who select that team when logging in to the phone console
    - When an agent is selected, a call is placed to the phone number he or she entered at the log in
    - An agent can only log into one team at a time
    - The call is redirected to a Team -> Anyone from the team can pick-up the call
  - <u>Capacity-based</u>
    - Used for third-party contact centers
    - Each capacity-based team has an associated phone number
    - When a capacity-based team is selected, a call is redirected to that specific phone number
    - Calls in excess of the specified capacity for the team will be queued

User Profiles

- Defines the users level of access within the application for each module

- Several types of profiles
  - Administrator – full access to the Tenant
  - Supervisor – full access to the Tenant except Tenant Settings
  - Premium Agent – only access to the Agent Desktop app and MM
  - Standard Agent – only access to the Agent Desktop app

- By default the system will set up Admin, Supervisor, Premium Agent and Standard Agent Profile

- Different types of supervisor profiles can be created

- Profiles are then assigned to each user

Agent Profiles

- Collaboration settings to enable conference/transfer for selected queues if needed

- Select agent's available idle / wrapup codes

- Enable Outdial if agent should have outdial capabilities
  - Outdial ANIs
  - Adress Book

- DN validation to restrict the agent's DN to use at sign on

- Agent viewable statistics

Multimedia Profiles

- Each profile specifies the number of each type of media the agent can handle depending on the mode selected.
    - **Blended:** Specify the number of contacts per media channel
    - **Blended Real-Time:** 1 real-time media channel (voice or chat) + other media channels (email and social)
    - **Exclusive:** Single contact across all media channels

- You can assign multimedia profiles to sites, teams, or individual agents.

Aux codes

- <u>Idle code</u> examples:
  - Meeting
  - Lunch
  - Break
  - Training

- <u>Wrap Up Code</u> examples:
  - Sale
  - Product inquiry
  - Customer complaint

- Agent access to the codes can be restricted in agent profile

- Idle codes and wrap up codes can be modified to fit your business model if you wish to use them for reporting

- Auto wrap up can also be assigned via the Agent auto wrap up profile

Skills

➢ You can route the call based on the skills of each team or agent

Steps needed:

1. Create the **definition for each skill**. There are different types of skills:
   a) Text
   b) Proficiency: value between 0 and 10
   c) Boolean: True/False
   d) Enum: Different selectable options

2. Create the **skill profile** with the values of each skill
   ➢ **Each agent/team only can have 1 skill profile,** so you need to combine several skills in the profile

3. Assign skill profiles to agents/teams

4. Create a **Skills Based queue**. Depending how you want to redirect the call, you can choose between Long Available and Best Available Agent options

5. Configure the Flow with the skills restrictions and relaxations
   a. Restriction: The call is only redirected to teams/agents with specific skill conditions
   b. Relaxation: After some time in the queue, the skill conditions can be reduced

Routing Strategies, Flows and Resources
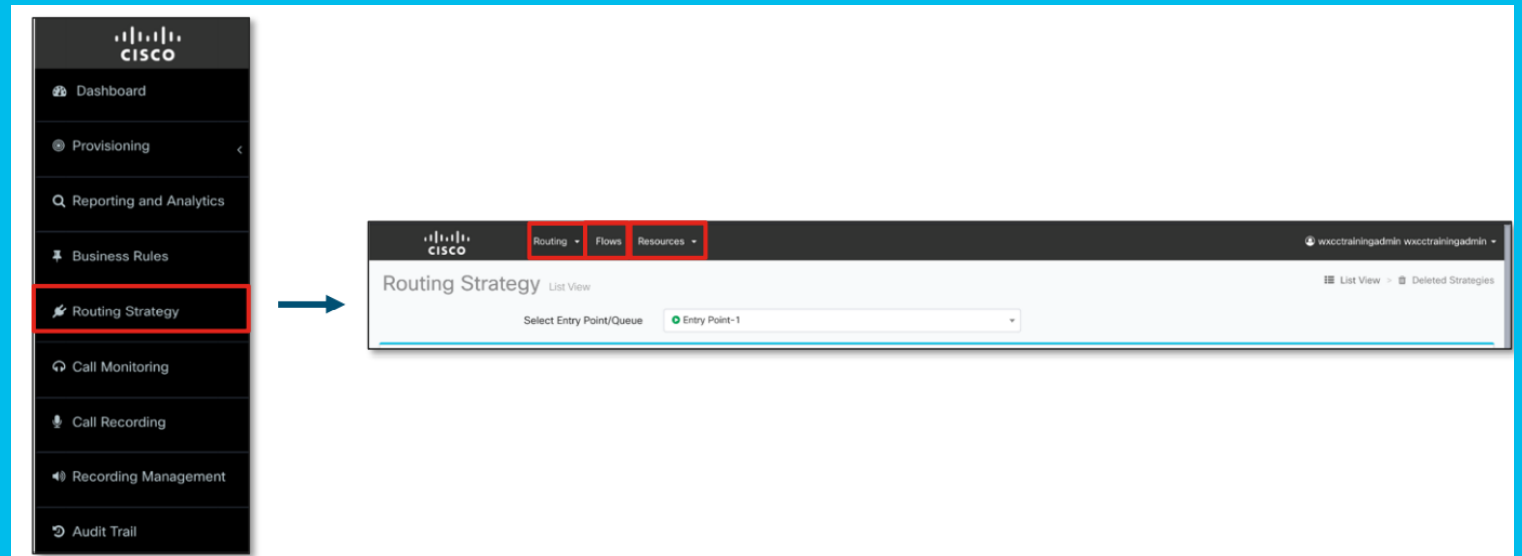
Resources - Message & Music Files (.wav)

- All audio files the caller hears within WxCC are in the format of a .wav file
  - Music on hold
  - IVR message
  - Closed messages
  - Message while on hold
- All wav files are stored in application under Routing Strategy>Resources
- If supervisors/admins need to implement a new wav file, they need to upload it to the resources tab and then attach it to the correct RS
- Use the following file formats and settings:
  - wav: u-Law, 8.000 kHz. 64 Kbps, mono – 100MB max
  - wave: a-Law, 8 kHz, 16bit, 64 Kbps, mono – 100MB max
- No spaces or Special Characters in the file name.

Flows

- It defines how a call is handled when it arrives at an Entry Point and how it will be subsequently dealt with in a Queue

- Once published, may be used in multiple Entry Point Routing Strategies

- The Flow Designer is a drag-and-drop UI used to define flows that orchestrate and automate the components
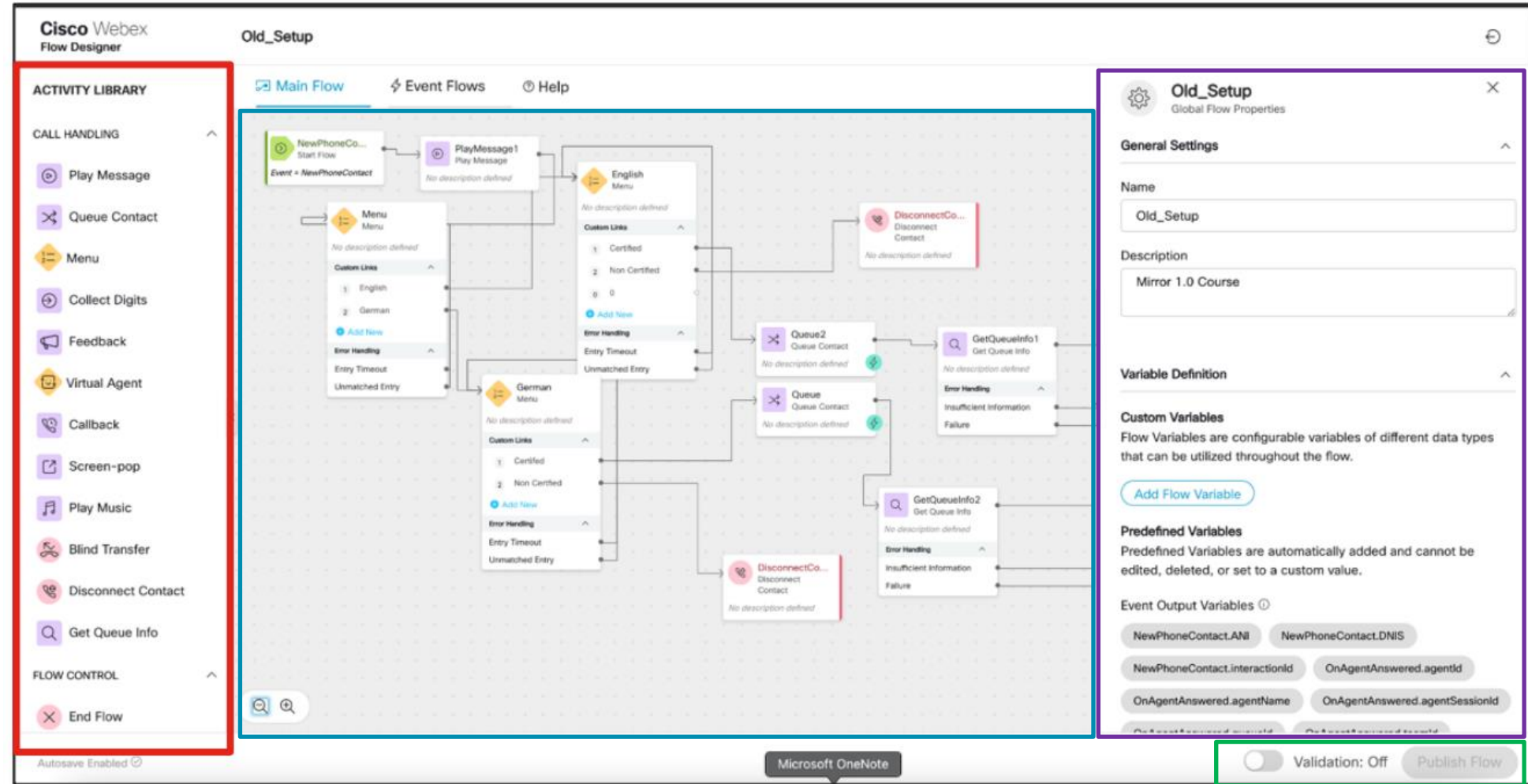
Activity Library
Flow map
Settings
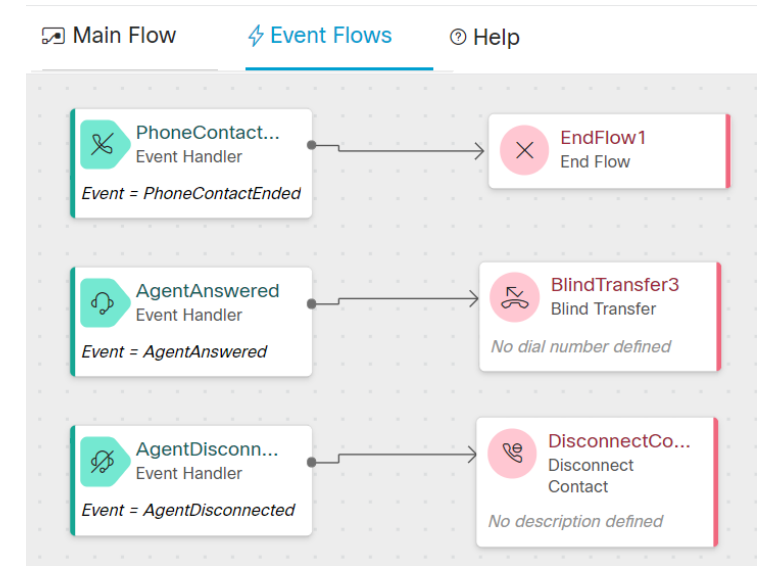Validation and Publish

Activities

- ## Call Handling

  Callback

  Queue Contact

  Get Queue Info

  Screen Pop

  Blind Transfer

  Feedback

  Disconnect Contact

  Menu

  Play Message

  Play Music

  Virtual Agent

  Collect Digits

- ## Flow Control

  BRE Request

  Condition

  GoTo

  HTTP Request

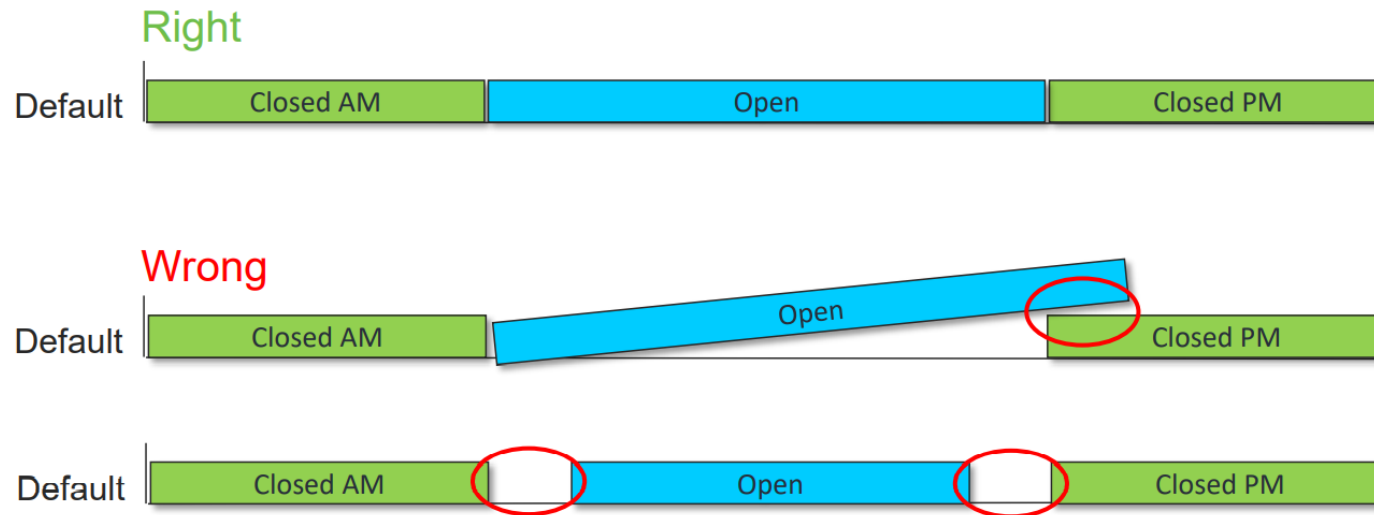 Case

  Parse

  End Flow

  Set Variable

- ## Event Flow

  *More info about the Flow Designer options in the Admin Guide

Routing Strategies

- Entry Point Routing Strategies determine schedules and call flow selection

- Routing Strategies only must be configured for Entry Points (inbound and outbound)
  - RS for an EP must cover a 24hour period
  - Call distribution in Queue is not longer configured as Routing Strategy

- A single entry point or queue may have more than one routing strategy (and typically does)
  - Closed, holidays, etc

- As a supervisor you can turn an inactive RS to active for emergency purposes or inclement weather closures

Right

| Default | Closed AM | Open | Closed PM |

Wrong

| Default | Closed AM | Open | Closed PM |

| Default | Closed AM | Open | Closed PM |

Routing Strategies configuration

General Settings

Name	24x7
Status	Active

Enterprise Name: EMEAR Sales Tenant
Entry Point: EP_Voice_CCBU

Time Settings

Start Date: 22-Oct-2020
End Date: 22-Oct-2040
Day of Week: All Days

Start Time: 0000
End Time: 2400

Sun Mon Tue Wed Thu Fri Sat

Advanced Settings

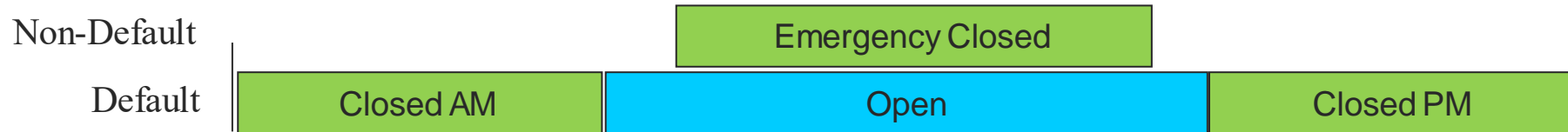Music on Hold: defaultmusic_on_hold.wav

Call Control

Flow: ContainerCentralen_Test

[Save] [Cancel]

Default vs Non-Default RSs

- **Default** routing strategies cannot overlap with one another

- **Non-default** routing strategies can overlap with Default ones

- **Non-default** take precedence

- **Active Non-default** routing strategies cannot overlap with other **Active non-default ones**

Non-Default		Emergency Closed	
Default	Closed AM	Open	Closed PM

Current Routing Strategies

- The **Current routing strategy** is the **ACTIVE** routing strategy
  - ➤ It is a working copy, created by the system, based on attributes such as status, default, start date, start time, etc

- **IMPORTANT:** In order to apply changes to a Routing Strategy, you may need to delete the current copy

- A new current routing strategy will be created automatically, assuming an active routing strategy for that time period exists

- The current routing strategy will be regenerated periodically

Advanced Provisioning –
Supervisor common tasks

Extra modules

- **Dashboard**
- **Provisioning** ✓
- **Reporting and Analytics** → Analyzer platform: Explained in the next training session
- **Business Rules** → Tenants can store their data in WxCC database and make HTTP requests to it for custom routing
- **Agent Desktop** ✓
- **Routing Strategy** ✓
- **Call Monitoring**
- **Call Recording**
- **Recording Management**
- **Audit Trail** → Provides an interface for authorized users to view details about the configuration changes made to the enterprise during any seven-day period
- **New Digital Channels** → Access to the new platform for configuring digital channels: Facebook Messenger, WebChat, Email and SMS

Dashboard
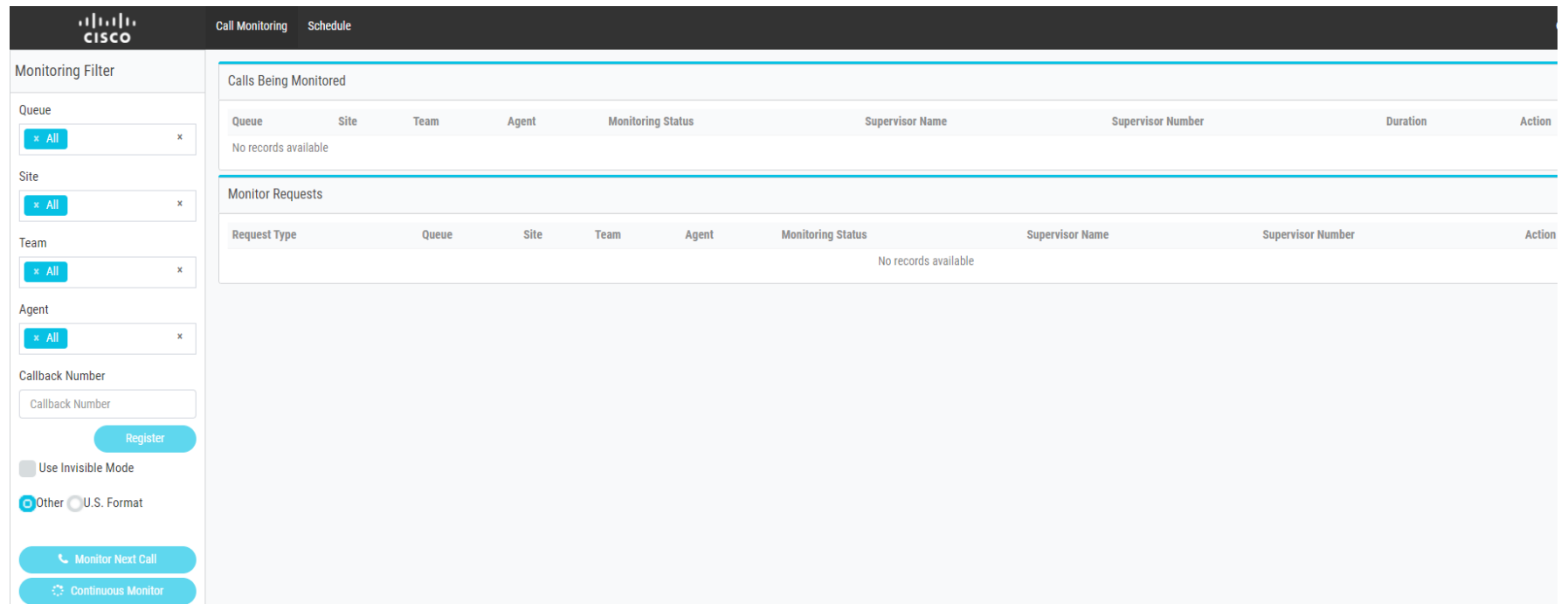
- Supervisors/Administrators can see some default and general dashboards about the Agents/Teams behavior through the Management Portal
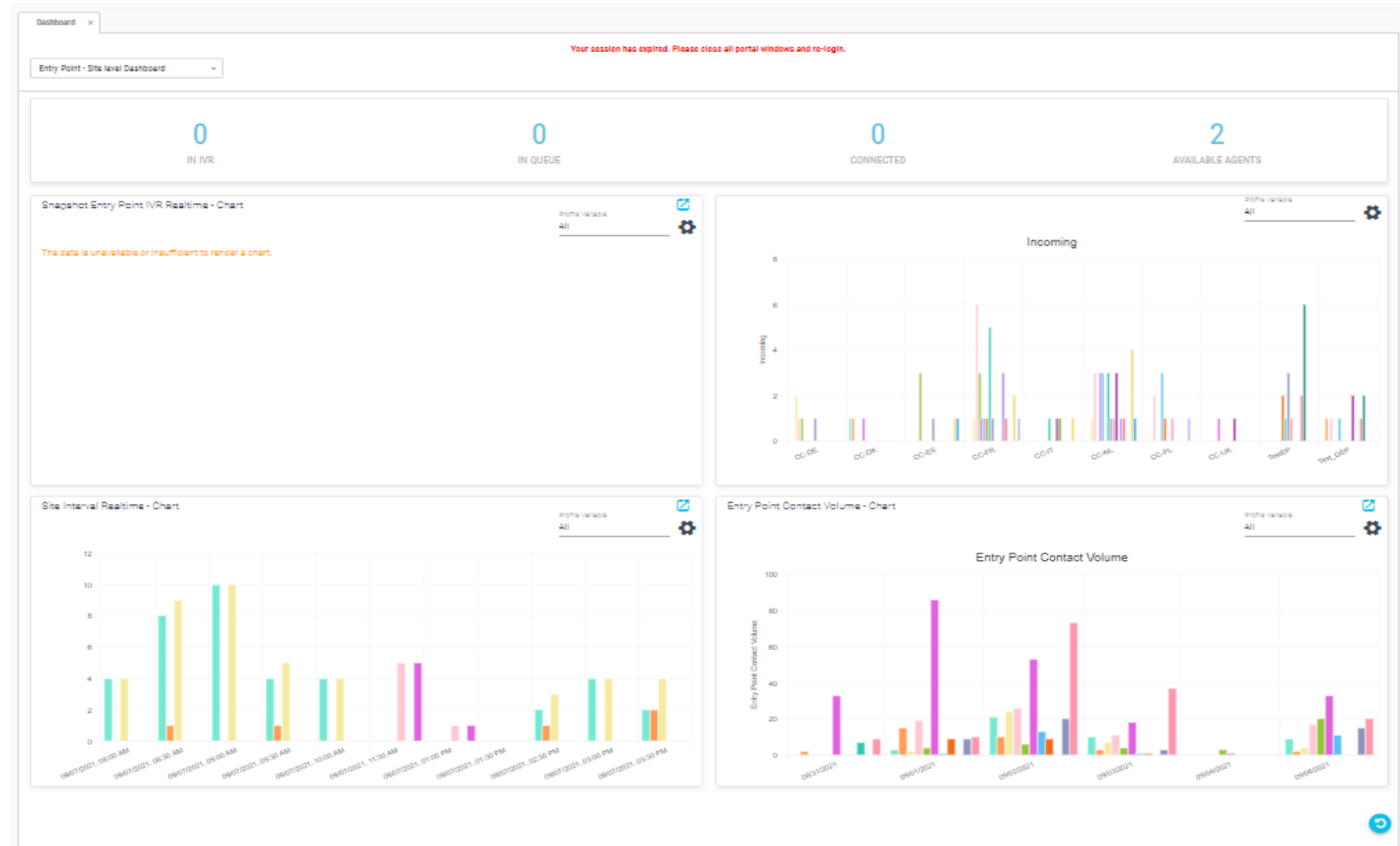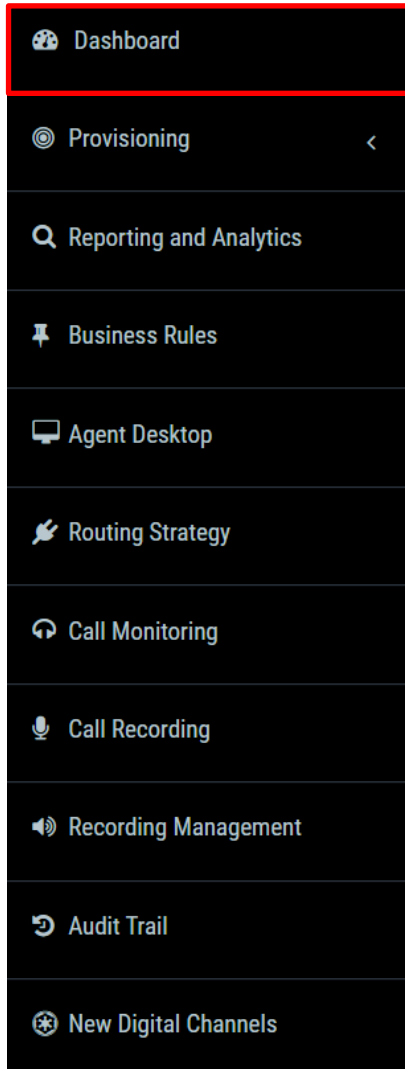
Call monitoring
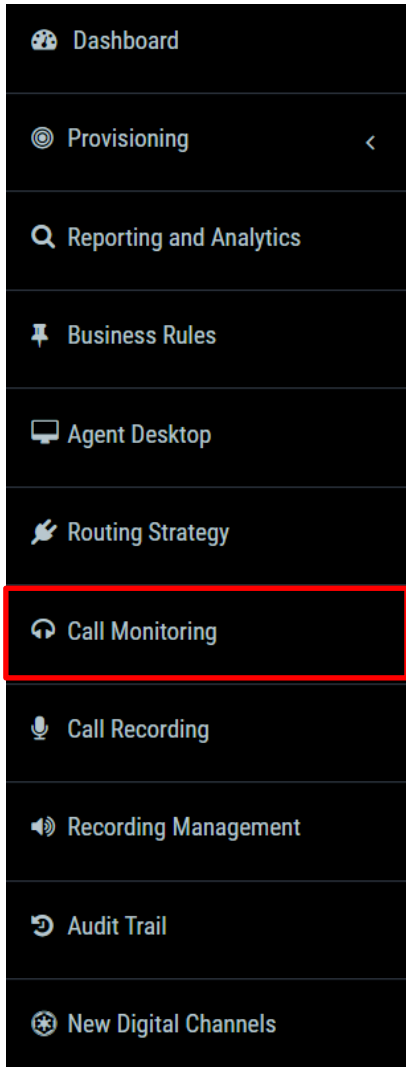
- Specify the criteria (filters) of calls you want to monitor

- Indicate a Callback Number, the number where you will receive a call to listening the conversation

- 2 monitoring requests types: "Monitor next call" and "Continuous monitoring"

- When the calls appear listed, click the button in "Action" column to start monitoring

- There are 2 monitoring types:
  - Barge-In: The supervisor participates in the conversation
  - Whisper coach: The supervisor can speak with the agent, without the customer hearing him

Recording and Monitoring Schedules

- Authorized users can select which queue, team, site, and agent they want to record/monitor, and for what time period.

- The recordings are stored in standard .wav format

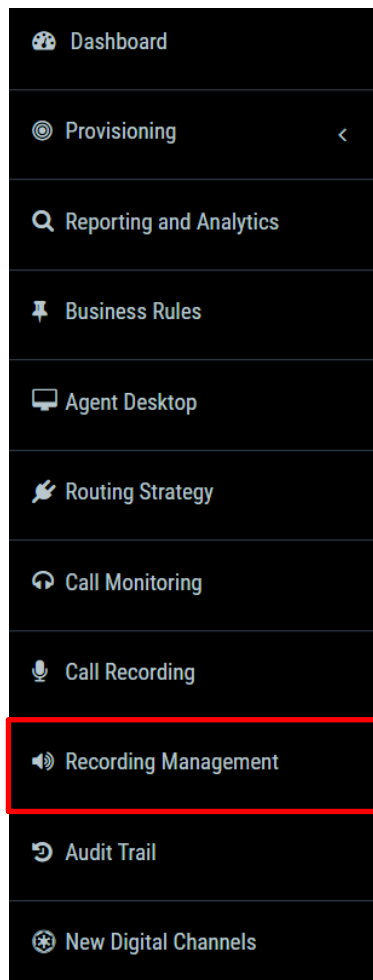- You can also use the "Recording Management" module to search and play recorded files

Call Recordings

- Search recordings to playback
  - Based on sites, teams or queues
  - Between a data range
  - Or tenant may be set to Record all calls
- You can Play, Download and tag the recordings
- All the recordings searched can also be exported

Navigation menu:
- Dashboard
- Provisioning
- Reporting and Analytics
- Business Rules
- Agent Desktop
- Routing Strategy
- Call Monitoring
- Call Recording
- Recording Management
- Audit Trail
- New Digital Channels

Questions?