Welcome To Contact Center as a Service Configuration Setup

Purpose

This document is intended as a guide to Partners setting up the configuration details of a contact center the first time and can also be a reminder for some tasks that are done infrequently. This guide is intended to help get a standard contact center ready to take the first call. The document will focus on voice-only setup. There are several steps involved in standing up a new contact center and the details will be directly linked to the features and functions of the IVR design and information flow. This document assumes a standard build with the key elements to route calls to the agents trained for specific calls, and that callers have the information needed to get to those agents.

What's needed

- List of users to be loaded
- Identify Customer users who will be Supervisors/Managers for Contact Center
- Desired IVR design
- List of recognized holidays
- Desired hours of operation for the contact center
- Choose the time zone to control monitoring/reporting and hours
- Decide what the team structure is, if there is more than one team
- An IVR to be built
- The agents loaded into the Partner Portal
- What queues or groups of queues agents should answer, and at what priority
- Know the scripts for the different prompts to be played in the IVR, and record them
- Decide whether to track any custom activities for the agents
- Download the software onto the agents' desktops

Setting Up Contact Center In the Customer Account Control Panel

Before you can begin building the IVR, you first must install the Contact Centre module in the customer account.

If you are setting up a brand new customer Voice Services module must be installed. If this is an Over The Top install, Voice Services is not required to be used – paid licenses for voice are not needed. You may skip the Voice Services setup wizard after the basic account setup is completed.

Creating a new customer account

If you are adding the Contact Center module to an existing account go to Voice Services and select the Contact Center tab to select the desired module.

Adding CC to An Account

The Contact Center users will need to be created in the Customer Account

Adding Users to An Account

Both Agent and Supervisor/Manager users will need to have Contact Center enabled

IVR Build

Building a Standard Design IVR

A standard design IVR can be built easily using the Simple IVR Tool.

***If a more complex IVR design is required, CCaaS Onboarding specialists are ready to help. Please reach out to your Account Manager for further information.*

To begin using the Simple IVR Tool, first complete the certification. Please go here: (Insert link to Simple IVR Tool certification course when it's published)

This document assumes that an initial meeting with the customer has taken place, and their design wishes are already captured. If the Contact Center kickoff call hasn't taken place yet, here is a handy guide: *(Insert link to Contact Center Pro/Elite Setup IMU course and Implementation Checklist)*

Before building the IVR, several components need to be in place.

1. Holiday schedule
2. Working hours schedule
3. Prompt scripts and prompt recordings

Once the IVR is built, the partner (or the customer) can complete the configuration tasks to prepare for the first call to the new contact center.

Working with the CCaaS Specialist Onboarding Team

If the onboarding team is helping build the customer's IVR, they will build the IVR and then provide all the details the customer needs to access the Control Panel, what prompts are needed for the IVR, and testing.

Contact Center Configuration

Creating The Holiday Schedule

Please reference this link for details on the Holiday schedule (Product Knowledgebase - Holidays)

If the customer's CC is a 24/7 operation, this step isn't necessary and can be skipped.

Holidays can either be created as a schedule that lives in the configuration settings, or when needed as a one-off event. If creating the whole holiday schedule for the year, enter each holiday with the appropriate date and a description. The customer will easily be able to load different prompts to use if a different greeting is desired for each holiday.

Remember: the dates will need to be adjusted each year manually.

Working Hours

Please reference this link for details on creating a working hours schedule (Product Knowledgebase - Working Hours)

The customer can have their working hours set for all the queues, or for each queue individually.

If the hours are standard across all queues, only one schedule is needed. If they differ per queue, simply build as many schedules as needed.

If using the Simple IVR Tool, at least one schedule must be created before starting the build.

Hours can be standard for every day, or differ per day. Creating the schedule gives the customer lots of flexibility.

Exception dates are not the same as holidays, but great for closing for a half day for the annual company picnic, or a big all-hands meeting, or other such events.

Selecting the Time Zone

If the customer has one office that manages operations, this is a straightforward decision. However, some organizations can have contact centers around the world. Select the time zone that makes the most sense for managing the overall operations

Currently Support needs to assist with this step.

Agents & Teams

Please reference this link for details on configuring agent settings and creating teams Product Knowledgebase - Teams & Agents)

The agents who will be logging in to take calls, the supervisors/managers who will be managing and anyone else touching the CC will have their user logins created in Partner Portal. They can be added/removed from Partner Portal. Remember, for CC, create all the users needed - billing is based on concurrent users. People only logging in to the Control Panel are not counted as licensed users.

Teams

After creating all the users in Partner Portal and assigning them to the CC, they will appear under a Default Team in the Control Panel.

Create as many teams as required. As an example: teams that contain all the agents trained for a specific queue. It's also possible to create teams that contain agents cross trained on multiple queues, taking different calls at different priorities. Skillsets can help with multi-tasked agent setup (see below).

Creating teams will enable filtering in both monitoring, and reporting. Examples: it's possible to filter live views to focus on one team, or to generate historical reports per team. If the customer has only a single team, the views will account for that as well. The views will always contain the whole CC.

It's easy to move agents to a new team. Simply click on the team name in the left-hand menu. Go to the Members tab and select the agents to add to the team. If the CC is likely to have turnover, it might be wise to create an "Inactive" or similarly named team, allowing the customer to move staff out of active teams as required.

Thresholds can be set by team (as opposed to individually). This can make configuration easier if every member of a team will have the same settings. After setting thresholds for a team, each member of that team automatically adopts them. Flexibility can be key, so even if Team thresholds are set, they can be changed for individual agents as required.

Some Important Information to keep in mind…

Once an agent is created, their role can be changed from Agent (this is the default setting) to a Team Leader, Office manager, Call Center Manager or Administrator. These settings control what an individual can see when looking at monitors or running reports.

- Team Leader – restricted to only their team
- Office Manager – restricted to only their office (if there are multiple)
- Call Center Manager – can see all teams in all offices
- Administrator – can access everything

These roles are very useful for helping people to focus their view while managing different activities in the organization.

Note: External User is helpful if the CC is doing work for 3rd party customers, and has asked for the ability to randomly listen to calls for quality. External Users can't access any configuration pages and can only see activities related to their customers.

Each role comes with a default set functions/pages they can access; the Security tab allows for modifying these permissions. Adding or removing a check in a function/page will add or remove that from their view. Remember the role hierarchy: even as permissions are changed, the range of view doesn't.

Setting thresholds will trigger color changes as warnings on the live monitor and dashboards. They can also trigger alerts to Team Leaders/Managers. If desired, agents can be forced to available (ready to take calls) when the threshold expires for Not Ready and Wrap-Up.

Not Ready is a good status for when the teams first log in at the beginning of their shift. They can be logged in, but given a few minutes to open other apps, set up their workstations, etc. before the first call arrives at their phone. Forcing to available from Not Ready limits that time spent before getting that first call. Not Ready is also automatically triggered if an agent misses answering a call delivered to their phone.

Wrap-up can also be useful to limit. If there are no lengthy tasks that need to be completed between calls, forcing to available can give the agent a few moments to catch their breath, sip of water, or any other actions needed between calls, but they don't have to remember to make themselves available again.

This process does require some thought and consideration, but setting up agents and teams effectively helps immensely in the running of any contact center.

Uploading Prompts

Please reference this link for details on Prompt Files (Product Knowledgebase - Prompt Files)

Prompt Files or IVR…which comes first?

As a result of the design conversation with the customer, there should be a list of prompts to be recorded for each spot in the IVR. The next steps could be any of the following:

- Give that list to the customer and have them start creating the prompt files.
- Some customers will want the partner to do the recordings.
- Other may wish to hire professional voice talent do the recordings.

Any of the above are acceptable, with one caution: if the person doing the recordings isn't available when new prompts are needed to update something, the result will be multiple voices in an IVR. Best practice generally recommends someone in the customers' organization becomes the voice of the IVR.

To record the prompts, all that is needed is a basic audio file app and a clear microphone. The basic recorder that comes with the OS is fine. The microphone doesn't need to be expensive or high-end; it just needs to be clear. Using a laptop native mic can work, but it will likely pick up all background ambient noise (like the fan in the laptop). Best practice is a USB mic for prompt recording activities.

It's best to write out scripts for the prompts before recording them. While this represents some additional prep work, the recording process is generally much smoother when the person doing the reading has a clear written script to follow. It is perfectly acceptable for each customer to infuse the recordings with their organization's "personality" or brand voice.

Remember: different files are needed for each language. If two languages are desired, the customer will need a menu recording in language 1 and in language 2. The Welcome message should be in both (or all) languages as well as the language menu. After that, all prompts will need separate files in each language.

It's easy to upload new prompts, so if the first "recording session" isn't what the customer wants, they can do it again.

Agent Activities

Please reference this link for details on creating and assigning Agent Activities (Product Knowledgebase - Activities)

Activities are activities that the agents can use to track different tasks. This is a powerful reporting/monitoring tool.

Depending on the complexity of a CC daily routine, many or few activities may be required.

Activities are tied to agent status.

There are key statuses that the Agent Software uses:

- *Available – ready to receive calls*
- *Not Ready – this is an unavailable status triggered automatically if an agent misses a delivered call, or if desired at the beginning of their shift*
- *On Break – this is an unavailable status triggered when the agent sets their status to go on their coffee or lunch break*
- *On Call – this is automatically set by the software for the duration of a call*
- *Wrap-up – this is automatically triggered when a call ends and is active until the threshold is met or the agent sets themselves back to available*
- *Accept Internal Calls – generally used when someone needs to be available to answer questions from co-workers, but is working on something that doesn't allow them to take calls from queue*
- *Dialing Out – this is automatically triggered when an agent starts an outbound call from the agent software and is active for the duration of the call*

Customers can use only these activities, or can create their own. Activities can apply to only specific teams, queues, or to all queues. Activities can be set to an available, unavailable, or accept internal calls status.

Using activities can be incredibly important for calculating contact center efficiencies, agent occupancy, etc. and will vary from customer to customer.

Skillsets and Queues

Please reference this link for details on configuring Queue settings (Product Knowledgebase - Queue Settings)

Please reference this link for details on creating and assigning Skillsets (Product Knowledgebase - Skillsets)

One of the first concepts to understand is the relationship between a Queue and a Skillset.

A Queue is an IVR entity where calls sit waiting to be answered. Queues are arrived at from a menu (usually) and have agents assigned to answer those calls. A Queue can be one of a channel type (voice, chat, e-mail)

A Skillset is a grouping of the types of calls that agents are trained (or skilled) to answer and can have a single queue or multiple queues at different priority levels. Skillsets are tied to people.

Skillsets are generally assigned to teams, but can be assigned to individuals. Skillsets can include all channel types (voice, chat, e-mail).

Skillsets are most useful when assigned to teams with agents cross-trained to handle multiple types of calls. If a team is specifically trained for only one type of calls, it is easiest to assign the queue at the team level.

Skillsets are created and assigned to teams. However, once assigned to a team, use the Skills tab in the agent view to manage skills for an individual. This can include priority and even adding or removing queues from the agent skills.

The settings for queues include a default priority (that is overridden by a skillset) and the waiting time thresholds. If working hours are set per queue, it's possible to also manage the schedule per queue.

It is *not* mandatory to create skillsets. It *is* mandatory to assign teams or agents to queues.

Downloading the Agent Software

Please reference this link for details on downloading the Contact Center Agent (CCA) software: (Product Knowledgebase - Client Software)

Each agent can download the software themselves from the control panel, or someone can push the app to all workstations using the CCA download file which is MSI instead of EXE.

If each agent will be doing the download (especially important for remote workers) they will need to log in to the Control Panel and go to the downloads page to get the software. It's a brief download in most cases.

If agents will be working behind a firewall, IT may need to allow traffic on specific IPs for the agent software. Please go here for a link to the IPs to allow: (insert firewall doc link)