

Agenda

- Dashboard Training (introduction)
 - concepts/terminology
 - feature review
- Dashboard Training (concepts & hands-on)
 - ... A Walk Thru Your Production Setup...
 - Provisioning
 - Sites and Teams
 - Entry Points and Queues
 - Routing Strategy
- Skills Based Routing
- Reporting
- Questions



Dashboard – System Requirements

- Memory: 2 GB RAM, excluding operating system allocation. Note that some applications may require more memory.
- Operating System: Supported operating systems are listed below. Other client operating systems can be used at the customer's discretion. BroadSoft will only provide best effort support and will not work on product fixes on unsupported operating systems
 - Microsoft Windows: Windows 7, Windows 8 and Windows 10.
 - Mac: OSX (when supported browsers are used)



Dashboard – Browser Requirements

Supported Web browsers:

- Internet Explorer 11.0 and above
- Chrome version 40 to 51
- Firefox version 44 to 45

Required browser settings:

- Browser cache cleared before starting the current release for the first time
- Cookies: Enabled
- Security level: Medium
- Pop-up blocker: Disabled
- JavaScript: Enabled

Adobe Flash Player

- Adobe Flash Player 21 or later.
- Download the latest version of flash from : https://get.adobe.com/flashplayer/
- · Identify the version of flash installed by launching : http://www.adobe.com/software/flash/about/

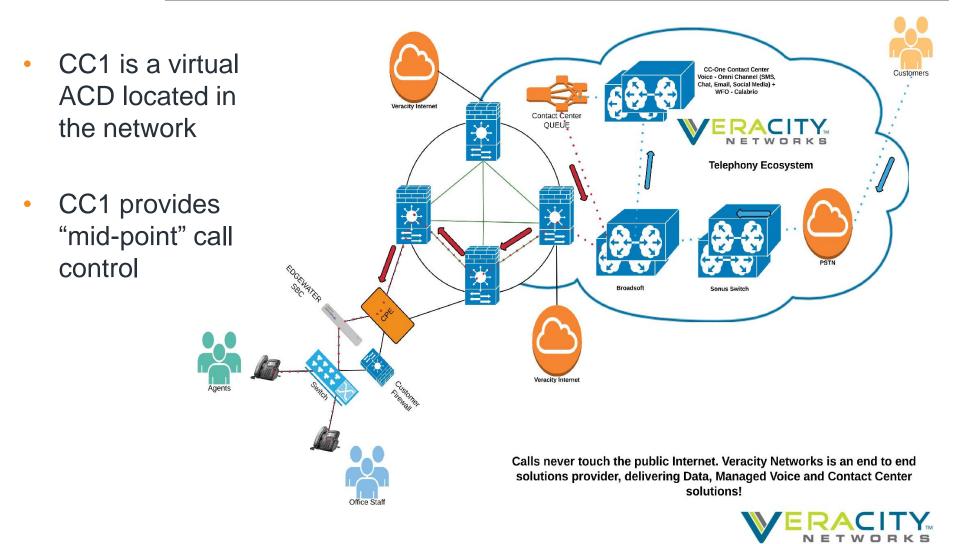




Service Overview

What is CC1?

VERACITY CC-ONE CALL FLOW DIAGRAM



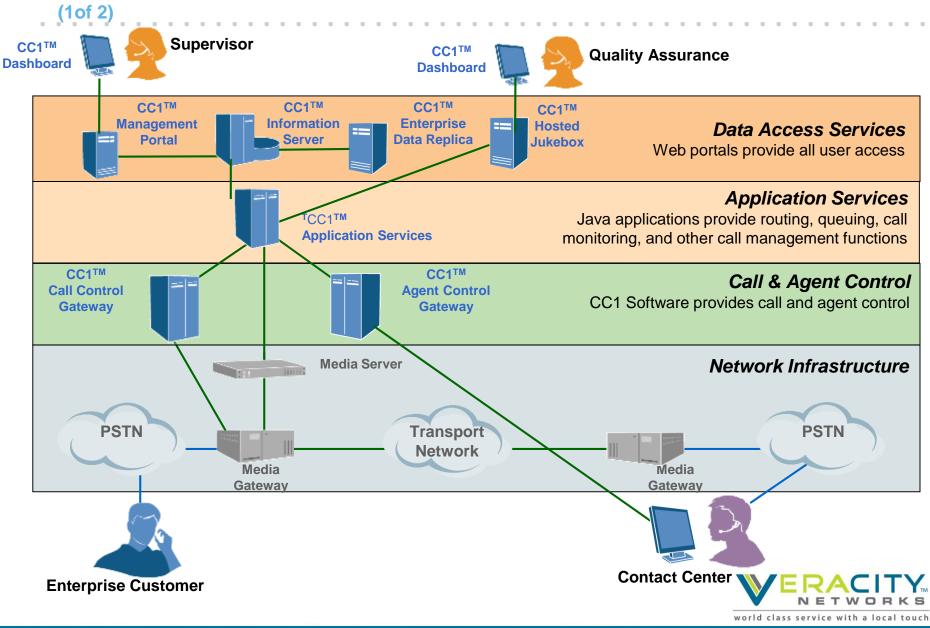
world class service with a local touch

What does CC1 do?

- For the caller
 - Auto-attendant and call queuing
 - Call routing based on menu prompts and selections
- 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 (including QA)
 - Call Monitoring
 - Call Recording
 - Real-Time Reports
 - Historical Reports



What are the CC1 components?



What are the CC1 components?

- Network Infrastructure
 - Media gateways: provide connectivity to the public telephone network
 - Media servers : provide voice prompts, music in queue and music on hold
 - Network routers: provide connectivity to the internet and private networks
- Call and Agent Control
 - Agent control gateway: accepts agent applet connections and data exchange
 - Call control gateway: manages the flow of the call across the network elements (above)

Application Services

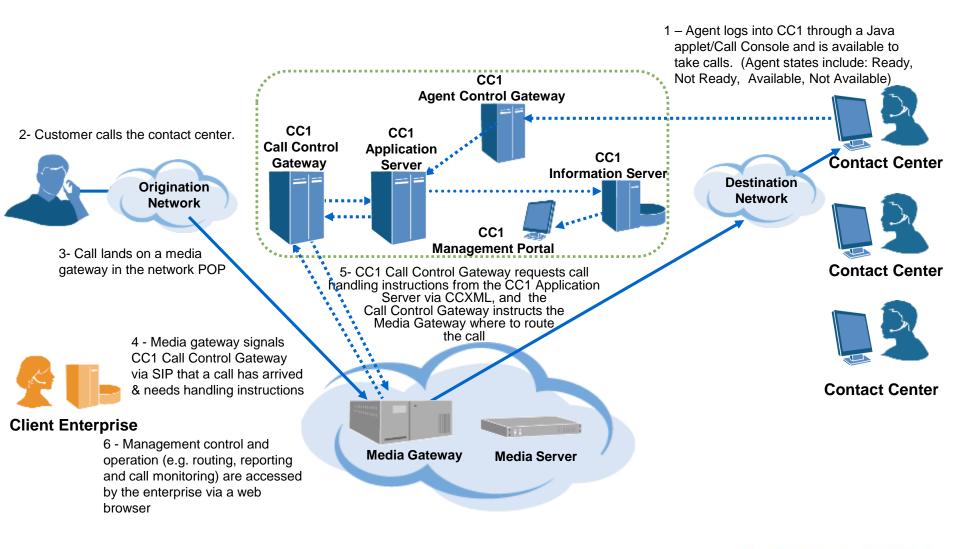
 CC1 applications that provide the ACD and call control functions and features for the management team (including QA)

Data Access Services

- CC1 management portal: provides access to the CC1 dashboard features
- Information servers: contain hosted call center data
- · Jukebox: contains hosted call recordings
- Data replica: contains call center data for a single customer

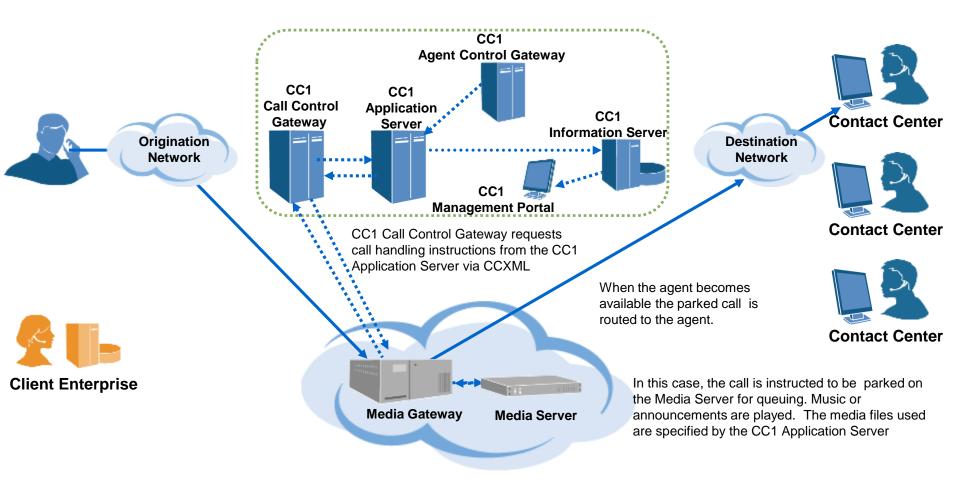


Inbound Call Flow – Agents Available



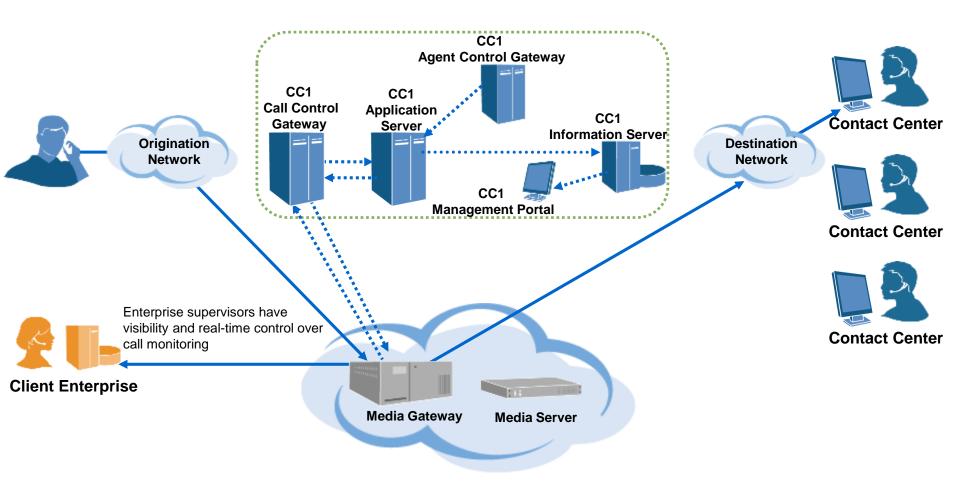


Inbound Call Flow – No Agents Available





Inbound Call Flow – Call Monitoring



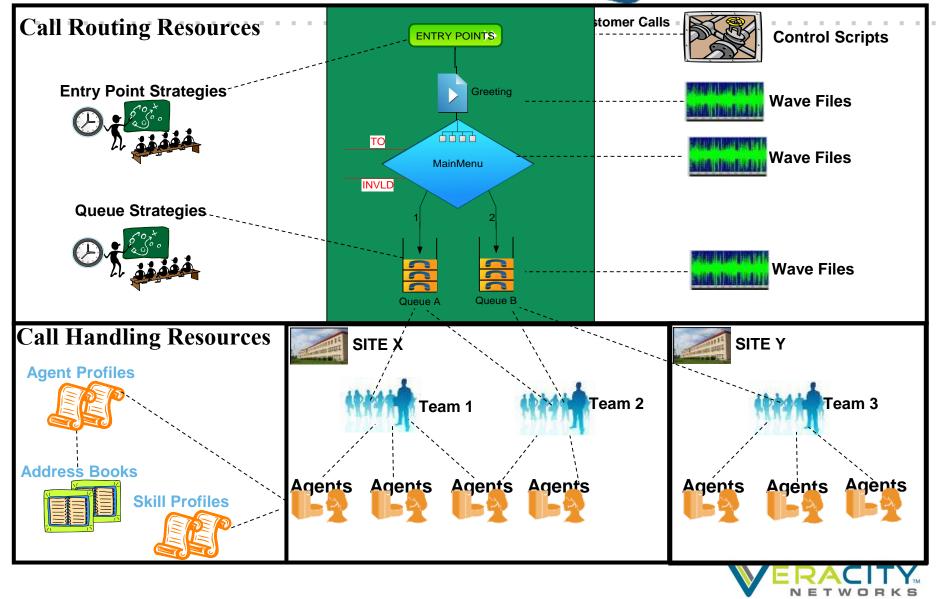


Introduction

Dashboard Training



CC1 Provisioning Framework



world class service with a local touch

Provisioning Framework Terminology

Entry Point. The initial landing place for customer calls on the CC1 system. One or more toll-free or direct dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point. Calls are moved from the entry point into a queue and are subsequently distributed to agents.

Queue. A holding place for calls while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agent team(s).

Site. A call center location under the control of the enterprise. For example, an enterprise named *Acme* might have sites in Chicago, Manila, and Bangalore.

Team. The logical grouping of agents. Teams handle calls for one or more queues. Agents can belong to more than one team, but agent can only log into one team at a time.

Agent. A person who answers customer calls; also referred to as a *customer service representative*.

Agent Profile. A group of permissions and Agent Desktop behaviors that can be assigned to specific agents. Each agent profile specifies permission levels relating to queue transfers, agent consults and transfers ("buddy teams"), wrap-up and idle codes, wrap-up time-out values, and agent auto-available.



CC1 Dashboard: Provisioning Features

Create/edit call handling resources

- Sites
- Teams
- Agents
- Agent profiles
- Skill definitions
- Skill profiles
- Address books

Create/edit call management resources

- Create entry points and queues
- Create routing strategies



CC1 Dashboard: Reporting Features

Real-Time and Historical Reporting

- Real-time call statistics
- 30 minute interval reports since midnight
- Historical (13 months) reports and trend analysis
- Call detail reports
- Agent Statistics
 - Report by site, team, or agent
 - Real-time agent state visibility
 - Historical statistics



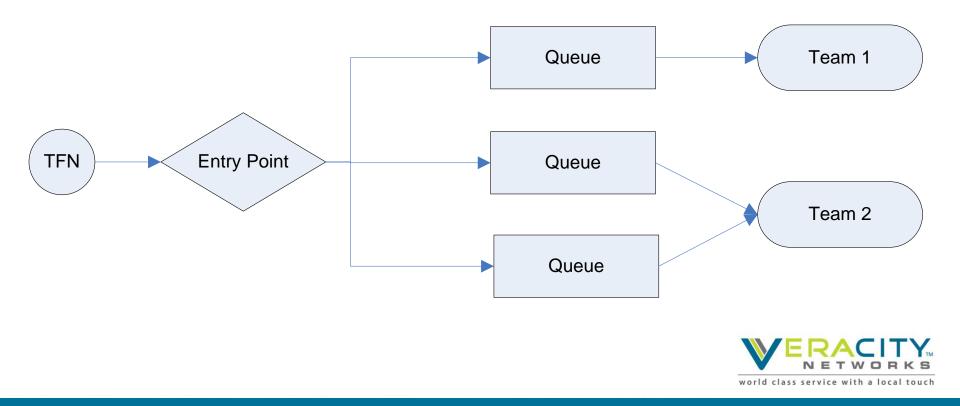
CC1 Dashboard: Call Monitoring and Routing

- Call monitoring
 - Silent call monitoring
 - Mid-call monitoring
 - Monitor by v-team, site, and/or team
 - Monitor from any location
- Call Routing
 - View call distribution strategies
 - Create routing schedules
 - Perform changes to routing logic
 - Create new call flows



Entry Points and Queues: Typical Call Flow

- 1. Toll free number is mapped to an entry point
- 2. Entry point IVR treatment
- 3. Call is routed to a specific queue
- 4. Call in queue is distributed to one or more teams of agents

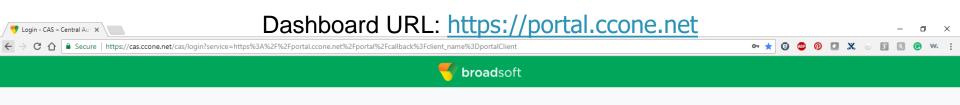


Production Setup Walk-thru

Dashboard Training



Launching the Dashboard



Username:		
Password:		
	Login	
	Forgot Your Password?	
For security reasons, please <u>lc</u>	ig out and exit your web browser when you are done accessing services that requ	uire authentication!

WERACITY NETWORKS

Provisioning Module on Dashboard

7	CC-One	Portal	Tenant	×	

\rightarrow	С	企	Secure	https://portal.ccone.net/portal,	/customer-nav?tid=1000029
---------------	---	---	--------	----------------------------------	---------------------------

decified and the set of the set o	Secure https://portal.ccone.net/portal/custom	er-nav?_tid=1000029		Q ↔ ☆ ③ ◎ ◎ Ⅰ ※ ○ ⑤ 图 ④ ●
And a set of the set o	lsoft ≡			r⊲ 🗘 VeracityGOLD Local Time 🙆 Allen Sproul 🗸
Image: Control Call Insight Report Call Insight Report Image: Control I	VeracityGOLD Dashboard ×			
Agent Agent Horaceda available Horaceda av		٨	CONNECTED 0	
Appendix and the port Appendix and the port No records available No records available Appendix and the port No records available	Call Snapshot Report		Call Interval Report	
Agent Snapshot Report Historical Report pings 0 up 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s 0 s	9 - 8 - 7 - 8 - 5 - 4 - 3 - 2 - 1 - 0 -	No records available	9- 8- 7- 8- 8- 4- 3- 2- 1-	No records available
Nip s s c mge inge			Historical Report	
2 I I I I I I I I I I I I I I I I I I I		No records available	9 - 8 - 7 - 8 - 8 - 4 - 3 -	No records available
			1-	



o ×

CC1 Provisioning - Overview

- Create/edit call handling resources
 - Sites
 - Teams
 - Agents
 - Auxiliary Codes for agent profiles
 - Agent Profiles
- Create/edit call management resources
 - Create Entry Points and Queues
 - Manage DN to Entry Point mapping
 - Create routing strategies



CC1 Provisioning - Agents

- Agents
 - Agents are associated with a site
 - Team(s) are assigned to the agent
 - Agents are assigned to team(s)
 - Agent Profiles are assigned to the agent
- Agent Profiles Consist of:
 - Collaboration settings to enable conference, transfer for selected queues and "Buddy Team" agent targets
 - Available Idle / Wrap-Up Codes



CC1 Provisioning - Teams

- Call Distribution
 - Calls in queues are distributed to teams
 - Agents are assigned to teams
 - Calls in a specific queue can be routed to one or more teams
 - Queue 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, etc.



CC1 Provisioning – Team Types

- Agent-Based
 - most commonly used type of team
 - composed of agents who select that team when logging in to the applet
 - 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
- Capacity-Based
 - a different type of team
 - each capacity-based team has an associated phone number
 - when a capacity-based team is selected, a call is placed to that phone number
 - calls in excess of the specified capacity for the team will be queued

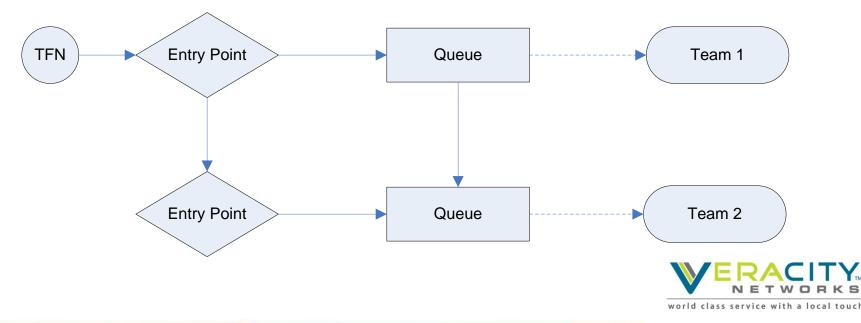


Routing Strategies



Entry Points and Queues

- Team generic term for both entry points and queues
- Typically the call flow proceeds from entry point to queue
- It is also possible to proceed from entry point to entry point
- Callers typically press keys to make selections in an entry point routing strategy
- It is also possible for the caller to press keys in a queue routing strategy



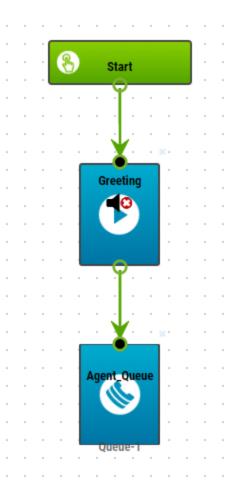
Routing Strategies

- Both entry points and queues require routing strategies
- Routing strategies specify the system behavior
 - Entry Point
 - IVR functionality
 - Screen pop
 - Queue
 - Music/messaging in queue and on hold
 - Routing type
 - Longest available agent
 - Load balance
 - Etc.
 - Call distribution (to agent teams)
- A single entry point or queue may have more than one routing strategy (and typically does)



Control Scripts

- Control behavior of entry points and queues
- Created by CC1 customer success manager or professional services
- Created under Call Flow Builder (CFB)
- Once uploaded/created, may be used in multiple routing strategies
- Note: custom (PS-generated) control scripts may require additional configuration in order to function correctly





Entry Point Example

The Routing Strategies X				Allen – 0 ×
← → C ☆ Secure https://portal.ccone.net/cdsui/rs/find/AWE	fP1CVsKik4QdhvyDv/AWltLKdRRRzGhnC71x1Z/UPDATE?			Q☆ © ◎ 0 I X ⊙ II I © ₩ :
Soft Call Routing - Team Capacity Control Scri	pts Resources Queue Precedence			Allen Sproul •
Overwrite Routing Strategy				₩ Routing Strategies > Edit
General Settings				
Name	Open M-F 0000-24000	Enterprise Name	VeracityGOLD	
Status	Active	Entry Point	Entry Point-1	
Time Settings				
Start Date	15-Mar-2018	Start Time	O000	
End Date	🛍 01-Jan-2030	End Time	O 2400	
Day of Week	Weekdays	• Sun Mon Tue Wed Thu Fr	Sat	
Advanced Settings				
Music on Hold	defaultmusic_on_hold.wav	v		
Call Control				-
Control Script	Greet_to_Queue	👻 Image		
Greeting	defaultmusic_on_hold.wav	x 👻 (mediaFile, A valid media fi	le.)	
Agent_Queue	Queue-1	x 👻 (vteam, A valid VTeam.)		
	✓ Apply	The Reset Manage		
		🖺 Save 🗶 Cancel		



Vorcion 10.0.0.02

Copyright © 2018 BroadSoft Inc. All rights reserved.

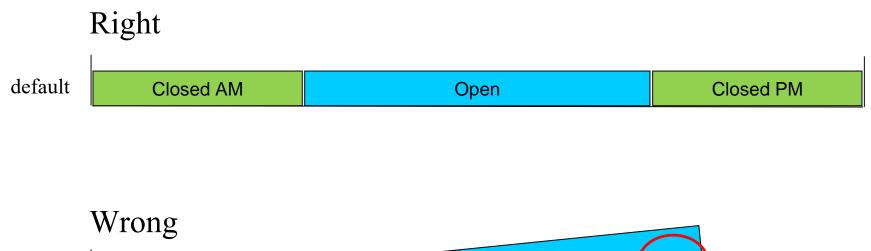
Routing Strategies

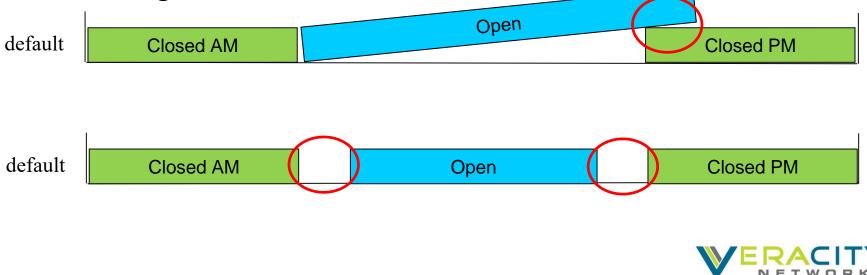
- Default routing strategies cannot overlap with one another
- Non-default routing strategies can overlap with default
- Non-default take precedence
- Non-default routing strategies cannot overlap with other non-default





Routing Strategies (cont.)





world class service with a local touch

Routing Strategies (cont.)

- Two routing strategy types:
 - Default
 - Non-default
- Specified at time routing strategy is created

Advanced Settings			
	Music on Hold	Select an option	•
	Flag as Default Routing Strategy	Yes	
 Two "levels" 			



Current Routing Strategies

- 🌱	broadsoft Call Routing -	Team Capacity Control Scripts	s Resources Queue Pre	cedence						Allen Sproul •
Call I	🛱 Calendar View > 🗮 List View > 🗃 Deleted Strategies									
		Select Entry Point/Queue	• Entry Point-1			Ŧ				
+ Ne	ew Strategy								Search	
	Name	Jî ID	11 Status	↓î Default	1 Repetition	↓î Start Date	1 Start Time	1 End Time	↓î End Date	ţţ.
	Current-Open M-F 0000-24000	AWItLM7KRRzGhnC71x1a	Current	No	Weekly	15-Mar-2018	0000	2400	15-Mar-2018	
	Closed S-S 0000-2400	AWItMAKg0qf2Z8R0d_rl	Active	Yes	Weekly	15-Mar-2018	0000	2400	01-Jan-2030	
	Open M-F 0000-24000	AWItLKdRRRzGhnC71x1Z	Active	No	Weekly	15-Mar-2018	0000	2400	01-Jan-2030	
	Open Mon-Fri 0800-1700	AWGfnjXh0qf2Z8ROd9JW	Active	Yes	Weekly	16-Feb-2018	0000	2400	16-Feb-2028	

- 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
- In order for changes to a routing strategy to take effect, 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



Current Routing Strategies (cont.)

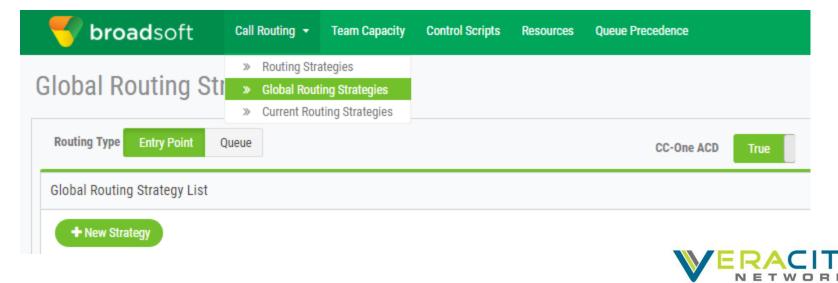
- Select multiple Entry Points or Queues.
- Display current routing strategies for each.

	Call Routing 👻	Team Capacity	Control Scri	pts Resources	Queue Precedence
Filter	 Routing Str Global Rout 	ategies ting Strategies	Strateg	jies	
Display By Entry Point -	> Current Rou	ıting Strategies			
Entry Point × All ×	En	Entry Point try Point-1	c 11	Nam urrent-Open M-F 00	
⇔ ∰ Apply					



Global Routing Strategies

- Takes precedence over routing strategies defined "locally" at the entry point or queue level
- A single global routing strategy can be applied to multiple entry points or multiple queues
- Non-default global routing strategy takes precedence over default global routing strategy
- When active, global routing strategy shows up as "current" routing strategy for entry point or queue



Routing Strategies Example

M Inbox (2	1) - cdonato@br 🗙 🔢 BroadSoft - Cale	endar - M 🗙 👎 Contact	: Center Dashboard	K 👎 Call Routi	ing Strategy - ht 🗙 👎 Provisio	oning - https://das 🗙				(!) celonei	00m – 0 ×
\leftrightarrow \Rightarrow C		☆ 영 🛯 🔾 :									
🔢 Apps 🔘	Broadsoft - My Applic 🔣 Lucidchart 🧃	💈 Calendar - 🛛 👎 DEMO	Contact Cente 🧧	Birch PROD Cont	tact 🗧 🗋 Agent Desktop Launc	🕘 Swagger UI - https://i	🝐 Shared with me 💧 Shared with me - Goo	SC-One Custome	er: Eci 🧹 Log In Smartsheet -	🗶 Knowledge Base - Kno 🧧	ANALYZER »
🦰 😽 k	Call Routing -	Team Capacity Cor	ntrol Scripts Re	sources Queue	Precedence					Help cdonato EdgePestCor	ntrol Mountain Daylight Time
Call Routing Strategy List View > 🗃 List View > 🍵 Deleted Strategies											
		Select Entry Point/Queue	CEP_Angies	List			v				
New St	trategy									Search	
	Name		↓† _{ID}	↓î Status	↓† Default	11 Repetition	11 Start Date	↓1 Start Time	↓↑ End Time	↓† End Date	e
i	Current -Mon-Fri Open 0700-1900		114789	Current	Yes	Weekly	18-Oct-2017	0700	1900	18-Oct-2	017
1	Mon- Fri Closed 1900-2400		111438	Active	Yes	Weekly	11-Oct-2017	1900	2400	11-Oct-2	057
i	Mon-Fri Closed 0000-0700		111444	Active	Yes	Weekly	10-Oct-2017	0000	0700	10-Oct-2	057
1	Mon-Fri Open 0700-1900		111463	Active	Yes	Weekly	11-Oct-2017	0700	1900	11-Oct-2	057
i	Sat Closed 0000-0700		111451	Active	Yes	Weekly	11-Oct-2017	0000	0700	11-Oct-2	057
i	Sat Closed 1600-2400		111457	Active	Yes	Weekly	11-Oct-2017	1600	2400	11-Oct-2	057
i	Sat-Open 0700-1600		111475	Active	Yes	Weekly	11-Oct-2017	0700	1600	11-Oct-2	057
i	Sunday Closed		109762	Active	Yes	Weekly	07-Oct-2017	0000	2400	07-Oct-2	057

Showing 1 to 8 of 8 er	tries			First Previous 1 Next Last
Routing Strategy - 1	/team Mapping Details			
Number	Destination	↓† Type	17 Routing Strategies	11
1	Q_AngiesList	Queue	Mon-Fri Open 0700-1900,Sat-Open 0700-1600	

Mon- Fri Closed 1900-2400, Mon-Fri Closed 0000-0700, Sat Closed 0000-0700, Sat Closed 1600-2400, Sunday Closed

Entities displayed in the Routing Strategy - Vteam Mapping Details table are based on user access.

••• Q_InsideSalesVM

Queue

Copyright © 2017 BroadSoft Inc. All rights reserved.

2

Showing 1 to 2 of 2 entries



Version 9.1.0

Routing Strategies Example - EP

/	👎 Call Routing Strategy - ht 🗙										<u>\$</u> 5 o	domio@ —	٥	×
(> C 🔒 Secure http://www.secure	://dashboard-bcc.tra	anserainc.net/cds	ui/rs/list/2433								☆ 0	© 0	:
	Apps 🗿 Broadsoft - My Appl	🛛 😋 Lucidchart 🛛 📆	Calendar - 🛛 🔫	DEMO Contact Ce	nte 👎 Birch F	ROD Contact 🤄 💾 🗛	gent Desktop Launc 🌘 Swag	gger UI - https://i 🔥 Shared with me	🝐 Shared with me - Goo 🝔 O	C-One Customer: E 🗸 🗸 Log In Smartsheet	- 🔀 Knowledge Base - Kn	T ANALYZER		»
		Call Routing 👻	Team Capacity	Control Scripts	Resources	Queue Precedence					Help cdonato Edge	PestControl Mouni	tain Daylight ⁻	Time
C	Call Routing Strate	gy ListView									🛗 Calendar View > 🗄	List View > 🏛 I	Deleted Strate	egies
			Select Entry Point/C	Queue O E	_Chicago			•						
1	New Strategy										Sea	rch]
	Name		J† ID	↓† Statu	;	↓† Default	↓↑ Repetition	👫 🛛 Start Date	👫 🛛 Start Ti	me 👫 End Time	↓† End	Date	.↓†	
	i Current -Open 24	K7	113609	Curre	nt	Yes	Daily	18-Oct-2017	0000	2400	18-0	ct-2017		
	Dpen 24X7		109574	Active		Yes	Daily	20-Sep-2017	0000	2400	20-S	ep-2057		

Showing 1 to 2 of 2 entries				First Previous 1 Next Last
Routing Strategy - Vteam Mapping Details				
Number	↓	↓↑ Туре	↓↑ Routing Strategies	ţţ
1	DEP_MainMenu	Entry Point	Open 24X7	
Showing 1 to 1 of 1 entries				

Entities displayed in the Routing Strategy - Vteam Mapping Details table are based on user access.

Copyright © 2017 BroadSoft Inc. All rights reserved.

Version 9.1.0



Routing Strategies Example - Queue

👎 Routing Strategies - http: 🗙				(1) admida@ — 🗇 🗙
\leftarrow \rightarrow C \blacksquare Secure https://dashboard-bcc	.transerainc.net/cdsui/rs/find/2319/114418/update?			९ 🕸 🔍 🔍
🏥 Apps 🧿 Broadsoft - My Applic 🔣 Lucidchart 🛔	📅 🖸 Calendar - 👎 DEMO Contact Cente 👎 Birch PROD Contact 🤇 🗋	Agent Desktop Launc 🛛 🚯 Swagger UI - https://i 🛛 📥 Shared with r	me 🛛 👃 Shared with me - Goo 🍔 CC-One Customer: Eo 🧹 Log In Smartsheet	- 💥 Knowledge Base - Kn 👎 ANALYZER 🛛 🛛 »
Sall Routing - Team Ca	pacity Control Scripts Resources Queue Precedence			Help cdonato EdgePestControl Mountain Daylight Time
Overwrite Routing Strategy				🕀 Routing Strategies > Edit
General Settings				
Name	Mon-Fri Open 0700-1900	Enterprise Name	EdgePestControl	
Status	Active	Queue	Q_Customer Service	
Routing Type	Longest Available Agent	Ŧ		
Time Settings				
Start Date	🛗 17-Oct-2017	Start Time	O 0700	
End Date	🛗 17-0ct-2057	End Time	Ø 1900	
Day of Week	Weekdays 💌	kon Tuo Wed Thu Fri Sat		
Advanced Settings				
Music on Hold	defaultmusic_on_hold.wav	▼ Maximum Time In Queue	1800	
Retries within the Team	3			
Call Control				-
Control Script	QueueCall	▼ Image		
MIQ2	hold_for_agent.wav × +	(mediaFile, A valid media file.)		
	Apply 3 Reset			
Call Distribution				-
Add Group				
Group1				- / ×
Teams				
Team Name	Site Name	Status	Team Type	
Customer Care	Orem	In Service	Agent Based	



Resources Library – Music & Messaging

👎 List All Resources - https: 🗙								¢5	cionalo@ —	D	×
← → C ■ Secure https://	/dashboard-bcc.transerainc.ne	t/cdsui/re/list.html							☆ 9	3 🖾 C) :
🗰 Apps 🧿 Broadsoft - My Applic	🔀 Lucidchart 🔟 Calendar -	👎 DEMO Contact Cent	e 👎 Birch PROD	Contact 🗌 Agent Desktop Laur	nc 🌐 Swagger UI - https://	👃 Shared with me 🔺 Shared with me - Go	c 🚦 CC-One Customer: Ec 🧹 Log In Smartsheet -	🗶 Knowledge Base - Kr	👎 ANALYZER	L	»
🬱 broadsoft	Call Routing 👻 Team Capa	acity Control Scripts	Resources Q	ueue Precedence				Help cdonato Edg	PestControl Moun	ntain Dayligh	nt Time
List All Resources									⇔ F	Resources >	• View
+ New											
									Search		
	Resource Name						↓ F Last Updated				11
i	Welcome_with_may_be_recorded.	.wav					09-Oct-17				
i	Tier1Greeting.wav						05-Sep-17				
÷	TestOneOneEntered.wav						13-Oct-17				
i	TestOneEntered.wav						13-Oct-17				
i	TestEnterOne.wav						13-Oct-17				
i	Silent.wav						25-Sep-17				
i	ResidentialMenu.wav						09-Oct-17				
i	MainMenu.wav						09-Oct-17				
i	hold_for_agent.wav						06-Oct-17				
i	ExtensionDialing.wav						22-Sep-17				
i	EdgeGenericGreeting.wav						21-Sep-17				
i	defaultmusic_on_hold.wav						05-Sep-17				
i	CommericalInsideSales.wav						22-Sep-17				
Showing 1 to 19 of 19 entries								First	Previous 1	Next	Last

Copyright © 2017 BroadSoft Inc. All rights reserved.

Version 9.1.0



Media Files

Audio/Music on Hold

- When a call is queued on the CC1 network, an audio file continues to play until the call is distributed to a team with available capacity.
- If the call is queued for longer than the length of the audio content, the audio file loops back and restarts from the beginning.
- CC1 recommends the audio file include a brief delay message followed by music.
- The message should announce the name of the associated queue or dept the caller has reached, instruct the caller to hold for the next available agent, and "may" if applicable - include a warning that calls may be monitored.
- You can record one audio file for each strategy, so the message can vary by time of day, day of week, holiday schedule, and other factors.



Media Files (cont.)

Creating Audio-on-Hold Files

If you don't have a source that can professionally record and provide audio music and messaging files, CC1 recommends using the Goldwave Digital Audio Editor to create and manipulate .wav files to use for audio on hold.

This editor can be downloaded from: <u>http://www.goldwave.com/release.php</u>

You can splice the voice prompt content to the front of the music file using the Goldwave application by copying the entire voice waveform and pasting it into the beginning of the music file. Because the file will loop back to the beginning, make sure that the length of the music is sufficiently long to avoid annoying repetition.

You can also use the Goldwave application to convert music from MP3 or other formats. Be sure to comply with copyright laws for any music you use.

Use the following file format and settings: wav: u-Law, 8.000 kHz. 64 Kbps, mono

Give the audio-on-hold file a name that does not exceed 23 characters, including the extension.

Otherwise, you "may" not be able to upload the file to the CC1 system.



Media Files (cont.)

Implementing Audio on Hold

To implement audio on hold:

- 1. Upload audio files as described in Uploading a Resource File.
- 2. Create a routing strategy that uses the audio file (see Creating a Routing Strategy).
- 3. Make a test call to ensure that the appropriate audio file is played when your call is queued.



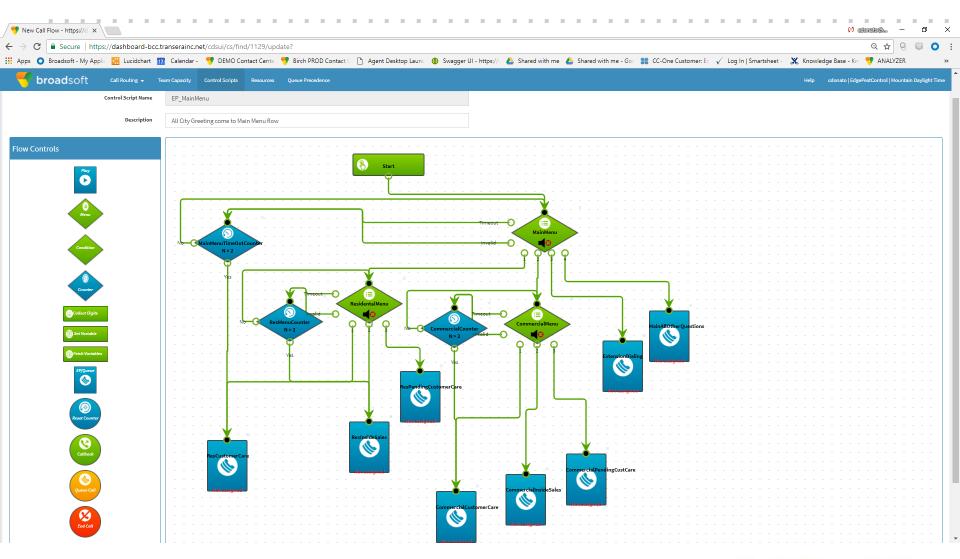
Call Flow Builder (CFB) – Control Scripts Library

Welcome Ben MissDig Eastern Standard Time Call Routing Team Capacity	_	ntrol Scripts Resour	ces Que	[Close Module Help]		 froad soft
Control Scripts						
Name	ID D	Description	Image	Created	Last Updated	Source
2OptionMenu	315			Oct 25, 2016	Oct 25, 2016	Flow Designer
3 3 Option Menu	316			Oct 25, 2016	Oct 25, 2016	Flow Designer
O 70ptionMenu	318			Oct 25, 2016	Oct 25, 2016	Flow Designer
9OptionMenu	317			Oct 25, 2016	Oct 25, 2016	Flow Designer
FAQMenu	343			Nov 15, 2016	Nov 15, 2016	Flow Designer
OutdialEP.js	313			Oct 19, 2016	Oct 19, 2016	Custom
OutdialQueue.js	314			Oct 19, 2016	Oct 19, 2016	Custom
O Queue	342			Nov 14, 2016	Nov 14, 2016	Flow Designer
🔘 queue.js	341			Nov 14, 2016	Nov 15, 2016	Custom
📝 Edit 📳 Copy 🗶 Delete	+ New	+ Upload Export Opt	tions : Excel CSV			

Copyright 2005-2016 @ BroadSoft Inc.



CFB – Call Flow Builder





Skills-Based Routing



Skills-Based Routing

 Skills-based routing (SBR) is an optional CC1 feature that enables you to assign skill requirements, such as language fluency or service/product expertise, to incoming calls so they can be distributed to agents with a matching set of skills



EPs, Queues, and Team/Agent Skills

- Entry Point
 - An entry point is the initial landing place for customer calls on the CC1 system
 - One or more toll-free or direct dial numbers can be associated with a single entry point
 - IVR treatment is performed while a call is in the entry point
 - IVR treatment can simply greet caller and pass to queue or greet, present a menu of options and route to the appropriate queue based on the selected option
 - With SBR, the entry point assigns skill requirements to the call based TFN or IVR selected option
- Queue
 - A queue is where calls are held while they await handling by an agent
 - Calls are moved from the entry point into a queue and are subsequently distributed to assigned teams to available agents for call handling
 - With SBR, relax or remove skills to handle inbound calls based on the skill requirement assigned in entry point
- Skill to Team/Agent Provisioning
 - Provisioning is used to select a skill profile for a team or an agent. If skill profiles are assigned to both a team and to an agent, the agent skill profile will take precedence over a team skill profile



Skills-Based Routing – Call Flow

Entry Point

1.1





.

Skill Definition

- Skills-based routing begins with the creation of skills definitions. Skill definitions under the provisioning module allows administrators to create, view and edit skills that can be assigned to calls and to skill profiles, which can then be assigned to teams or individual agents.
- The maximum number of active skills are defined by parameters set in the tenant settings. Up to 200 skills definitions can be created on a tenant.
- Once created, skill definitions cannot be deleted from the system.



Defining Skills

- Skill name enter name of skill
- Skill description optionally, enter a description of skill
- Service threshold # of seconds a customer call can be in queue for this skill before flagged as outside of service level
- Skill status active or not active
- Skill type:
 - Proficiency range from 0 to 10
 - Boolean value of true or false
 - Text a free form text skill (route by value)
 - Enum a named set of predefined values, example a product line can include a list of stationary, electronics or office furniture



Skill Profile

- A skill profile is a set of skills, each with an assigned value that can be assigned to an agent-based team or to an individual agent.
- For example, a skill of English might be assigned a high level of proficiency in one skill profile while set to a lower level in another profile.

Selection Panel	Skill Profile List												
open all close all	Skill Prof	cill Profile List											
🗊 Test Drive4	Profile Li	ofile List											
🗄 🟐 USA Denver CO		Profile Name	Description										
🕀 🏐 USA Plano TX	0	AdvEnglishAllProduct	Highly proficient english speakers who can handle all products										
	0	AdvSpanishAllProduct	Highly proficient Spanish speakers who can handle all products										
Skill Definitions	0	English-Spanish-Elec	Englisth and Spanish agents focused on Electronics										
	0	English3AllProducts	Basic English with ability to handle all product lines										
AllProductLine	0	EnglishBillingTrue											
SpanishSupport	0	SpanishAllProducts	Basic Spanish with ability to handle all product lines										
Supervisor		+ Add / Edit											
Support													



Skill Types

 Select check box to the left of the name of each skill you want to add to the skill profile, and specify the value of each selected skill

For this skill type	Do this to specify the skill value
proficiency	Drag the slider to a number between 0 and 10 to indicate how proficient the agent is in this skill.
boolean	Click one of the radio buttons to specify whether the agent has this skill (true) or does not have the skill (false).
text	Enter a maximum of 40 characters (including spaces).
enum	Select the check box next to each list value that represents a skill the agent has.



Assigning Skill Profile

- You can optionally select a skill profile for a team or an agent
- If skill profiles are assigned to both a team and to an agent, the agent profile will take precedence over a team skill profile.
- You cannot assign a skill profile to a capacity-based team

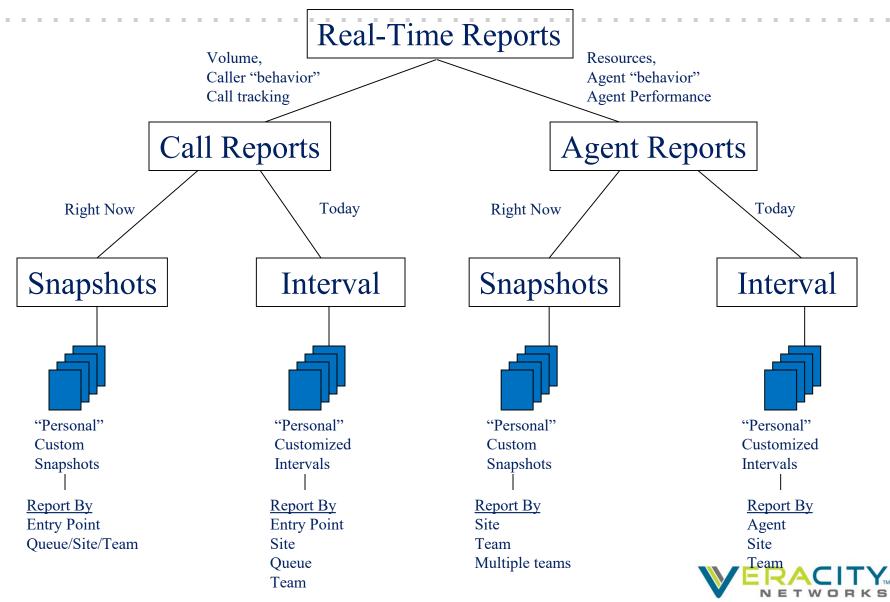
Innoome Kumat Ace Looal	Time (2) (Ossettioning (Here)			
Selection Nenel Dec. 11 (2020.01 Ace B GUSA Deriver CO B GUSA Plane TX CApertProfiles AddressBook Still Definitions PF Skill Profiles AddressBook Still Definitions PF Skill Profiles AddressBook Productime Productime Productime Productime	Add Team Add Team Add Team Details General Lettings "Team Nome "Team Type" O Capacity Based O Agent Based "Team Dit O It Service O Not Available Advanced Sectings "Team DN "Team DN "Team DN "History SubProfile Selected O" SupProfile Selected O"	Selection Panel acout (doar of Acout (doar o	Agent List Adive Bispendel Adris Vieton Barry Poter Daris Bichaels Corrie Bold Dase Sature Don Townson Doniese Sature Dase Likegatas Duble Likegatas Duble Likegatas Enword Heroto Ellen Onan Eric Methols Fiero Simpson Trank Parlor Trank Parlor Trank Parlor Benot Taten Hower Taten Insur Bartinaz	Add Agent Agent Details Agent Details Agent Details Codemail D Codemail D Active O Suspended Active
			Lasren förshall	Save Garced



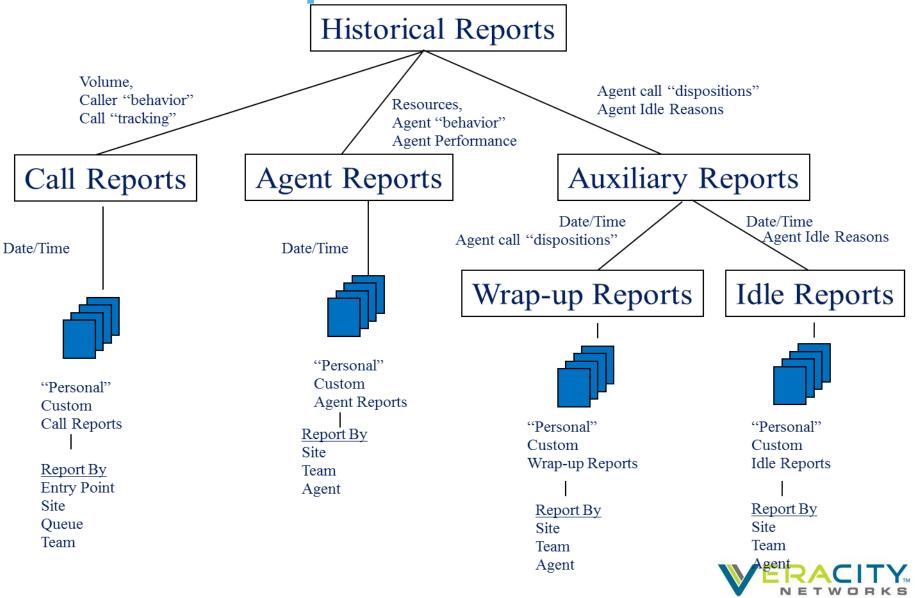
Reporting Framework



Real-Time Reports Overview



Historical Reports Overview



Questions?



Thank You!

Allen Sproul

Customer Experience Director

801-709-2102 (desk)

801-358-5270 (mobile)

allen.sproul@veracitynetworks.com