



Veracity CC-One Agent Training

Veracity Networks
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Veracity Powered by BroadSoft

Agenda

- CC-One service overview
 - Architecture
 - Call Flow Examples
- Agent Training
 - URL
 - Logging In
 - Receiving Calls
 - Other Functions
 - agent to agent – consult, conference, & transfer
 - queues – blind transfers
 - DN – consult, conference, & transfer
 - speed dial, wrap-up, outdial
 - hands on

Agent Desktop – 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)

Agent Desktop – 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/>

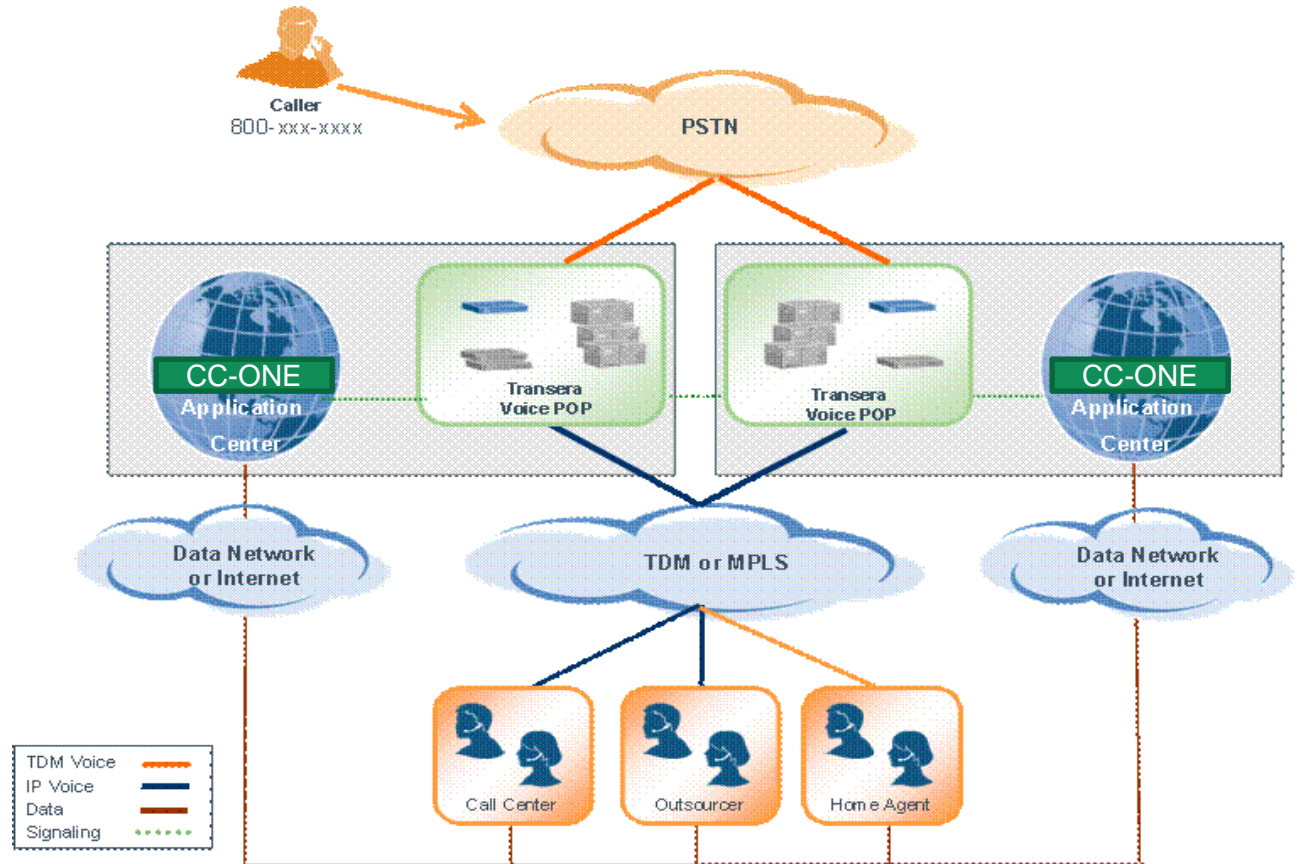


Service Overview

What is Broadsoft CC-One?

CC-One is a virtual ACD located in the network

- CC-One provides “mid-point” call control



What Does CC-One 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 CC-One components?

(1 of 2)

CC-One™
Dashboard

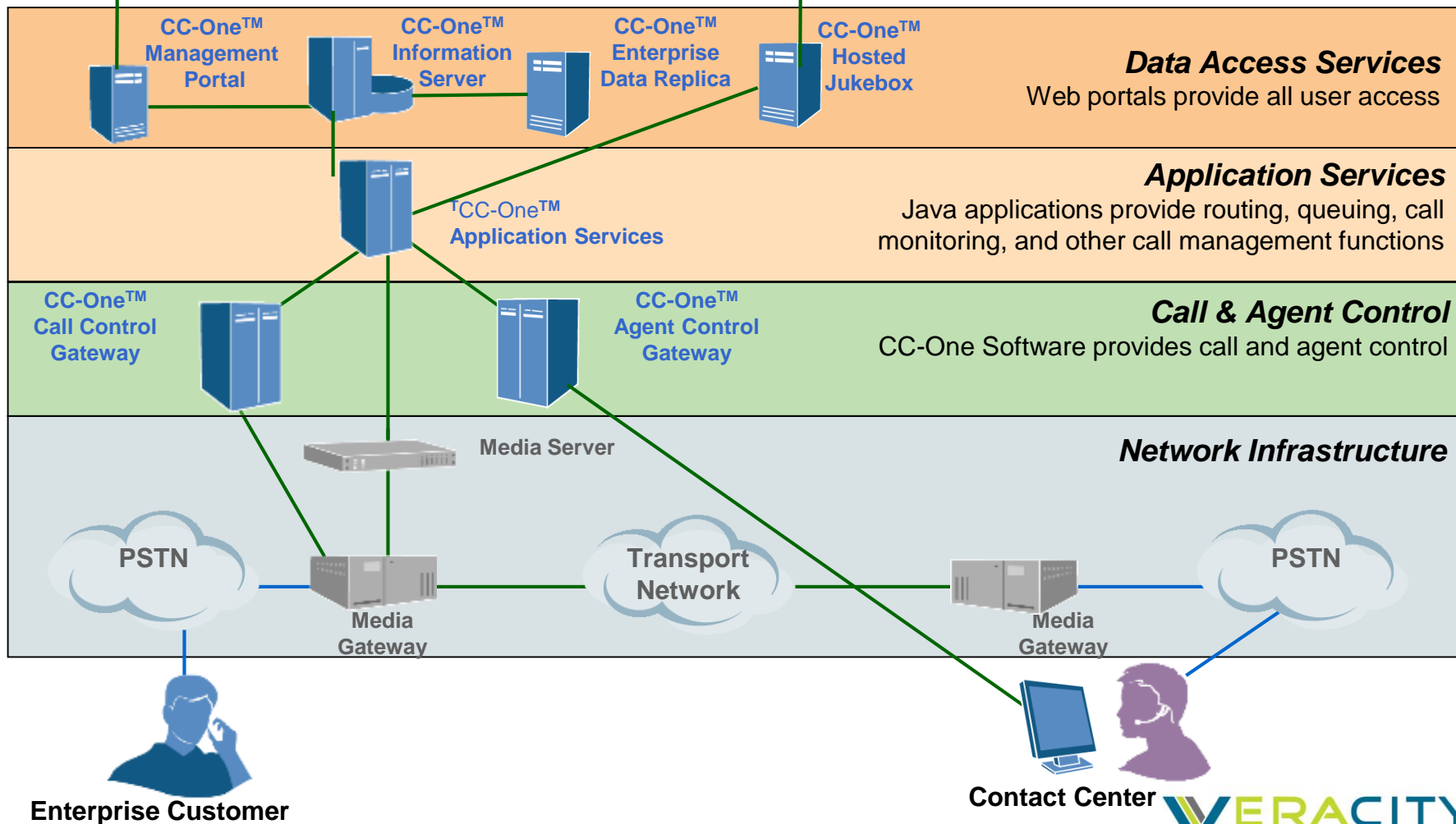


Supervisor

CC-One™
Dashboard



Quality Assurance



VERACITY™
NETWORKS

world class service with a local touch

What are the CC-One components?

(2 of 2)

- 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

Introduction

Agent Training

Launching the Console

- **HTML Agent Applet Portal URL**

➤ <https://portal.ccone.net>

Login - CAS - Central Authentic X

https://cas.ccone.net/cas/login?service=https%3A%2F%2Fportal.ccone.net

broadsoft

Username:

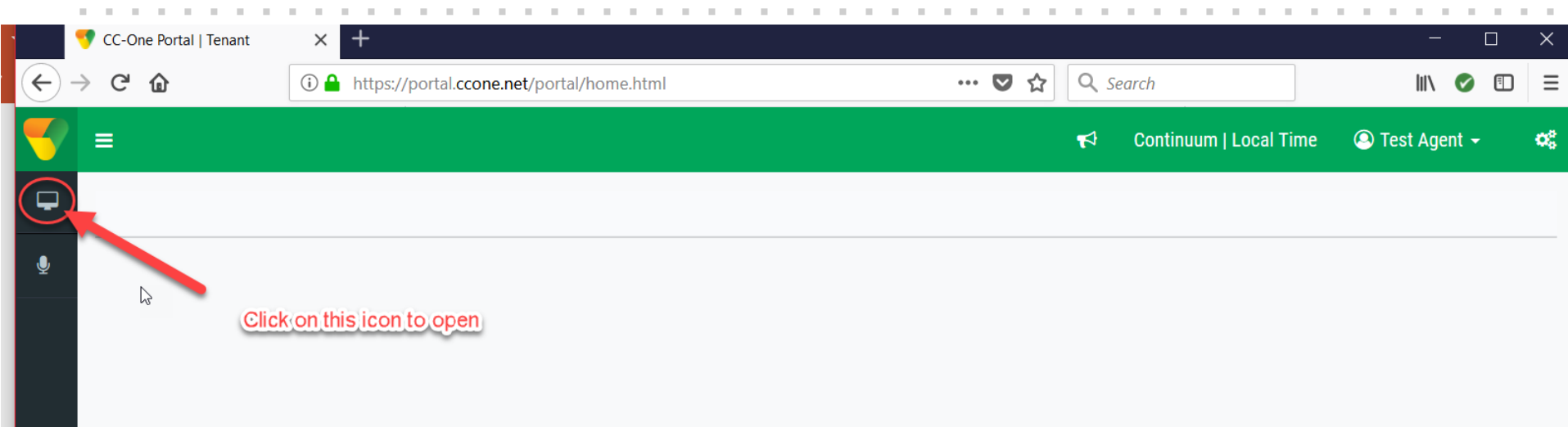
Password:

Login

[Forgot Your Password?](#)

For security reasons, please [log out](#) and exit your web browser when you are done accessing services that require authentication!

Initial Deployment of Console



Enter User ID
Password
(Email received from 'cc1notifier')

Username:

Password:

Login

[Forgot Your Password?](#)

For security reasons, please [log out](#) and exit your web browser when you are done accessing services that require authentication!

Agent Login

The screenshot displays the Broadsoft Agent Desktop interface. At the top, the browser address bar shows the URL `https://agent.ccone.net/ada-ws/ccone-ad/index.html#/home`. The interface features a green header with the Broadsoft logo on the left and a 'Sign Out' button on the right. In the center of the header, the agent's profile is shown with a circular icon containing 'TA', the name 'Test Agent', and the phone number '13013051424'. A dropdown menu is open next to the profile, titled 'STATUS NOW', with options: 'Default None Chosen' (selected), 'Available', 'Default None Chosen', 'Lunch', and 'Meeting'. Below the header, the 'My Channels' section displays '1 VOICE CHANNELS'. On the left side, there is a navigation menu with icons for 'All', a search bar, and a message 'No history to show'. Two red arrows point to the agent profile and the status dropdown menu, with labels 'Agent information' and 'Status' respectively.

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Go Available to Receive Calls

Change status to 'Available' to receive calls
- Calls can ONLY be received while in status of 'Available'

The screenshot displays the Broadsoft Agent Desktop interface. At the top, the browser address bar shows the URL <https://agent.ccone.net/ada-ws/ccone-ad/index.html#/home>. The interface features a green header with the Broadsoft logo on the left, a user profile for 'Test Agent' (ID: 13013051424) in the center, and a 'STATUS NOW' dropdown menu set to 'Available' on the right. Below the header, a left sidebar contains navigation icons for 'All', a phone icon, and a 'No history to show' message. The main content area, titled 'My Channels', displays a card for '1 VOICE CHANNELS' with a phone icon.

Receiving an incoming call

The screenshot displays the Broadsoft Agent Desktop interface. At the top, the user is identified as 'Test Agent' with a status of 'Available'. The interface is divided into several sections:

- Header:** Broadsoft logo, user profile 'Test Agent' (13013051424), status 'Available', and a 'Sign Out' button.
- Active Contact List (1):** A list containing one contact: '12403665928' with the name 'Q_Inbound_Test' and a duration of '00:00'.
- Call Details:** A section for the active call, showing:
 - CURRENT STATUS:** RINGING
 - SESSION DETAILS:**
 - ani: 12403665928
 - dnis: 2035801351
 - virtualTeamName: Q_Inbound_Test
 - ivrPath: EOI
 - pathId: StartCall PlayDone

Agent States

Agent Availability States

When you log in to the Agent Desktop, the system places you in a default Idle state. In order to be placed in a routing queue so you can accept contacts, you must place yourself in the Available state. If you need to go offline for a meeting, training, or your lunch break, you can place yourself in an Idle state. No contacts are routed to you when you are in an Idle state.

Agent State	Description
Available	You are ready to accept and respond to contacts. After you log in, you must select Available in the STATUS NOW drop-down list to receive routed contact requests.
Any Idle state	<p>You are logged in but not ready to accept contact requests. By default, you are placed in an Idle state when the Agent Desktop opens. Your CC-One administrator can configure additional Idle states that are appropriate for your enterprise. Therefore, you may see selections such as Lunch Break, Training, or Meeting in the drop down list that are not mentioned in this online Help.</p> <p>If you need to go offline during your work day, you can manually select an Idle state. In addition, you can select an Idle state while you are interacting with a customer, and you will be placed in that Idle state when the call or chat session ends or when you send or close the current email message. If you have questions regarding which Idle state to select, consult your supervisor.</p>

Agent State	Description
Ringing	A new voice contact card is in your Active Contact List in the left panel of the Agent Desktop awaiting your acceptance. If you don't accept the call within the time period configured by your CC-One administrator, the call returns to the queue and is assigned to the next available agent.
Connected	You have accepted the voice contact card and are connected to a caller. When the connection is made, a timer starts in the contact card indicating how long you have been connected. Information related to the call is displayed in the center panel of the Agent Desktop, and information about the caller is displayed in the right panel.
NotResponding	The phone rang but was not answered within the time period configured by your CC-One administrator. The call is returned to the queue. A message appears on your desktop that presents you with the option to either to take the next call or go into an Idle state. Select one of the options.
Call On Hold	You have placed the call on Line 1 on hold.
ConsultReserved	While you were in the Connected state, another person requested a consultation with you.
Consulting	You are consulting with another person such as another agent at your enterprise. A timer shows the amount of time you have been consulting with the person.
Conferencing	You are conferencing with a customer and an agent.
OutdialReserved	You have initiated an outdial call. Information related to the call is displayed in the center panel.
Wrap Up	<p>The call has ended. You are prompted to enter Wrap Up codes before taking another call. See Wrapping Up Voice Communications.</p> <p>While in the Wrap Up state, you cannot receive a routed or transferred contact card.</p>

Window Controls and Indicators

The screenshot displays the Broadsoft Agent Desktop interface. At the top, the browser address bar shows the URL `https://agent.ccone.net/ada-ws/ccone-ad/index.html#/home`. The interface header includes the Broadsoft logo, the agent's name "Test Agent" with ID "13013051424" and status "TEST", and a "STATUS NOW" dropdown menu set to "Available". A "Sign Out" button is located in the top right corner.

The main workspace is divided into several sections:

- Active Contact List (1):** Shows a single contact with ID "12403665928", name "Q_Inbound_Test", and a duration of "00:07".
- UC Contacts:** Includes a "Sign in to UC" button.
- Call Data (Session Details):** A red circle highlights the following information:
 - ani: 12403665928
 - dnis: 2035801351
 - virtualTeamNa... Q_Inbound_Test
 - ivrPath: EOI
 - pathId: StartCall PlayDone
- Call Control Buttons:** A red circle highlights a row of five buttons: "Hold", "Consult", "Transfer", "Conference", and "End Call".
- CONTACT HISTORY:** A section on the right side of the interface.

Placing Call on Hold

The screenshot displays a call center software interface. On the left, a sidebar shows an 'Active Contact List (1)' with a single entry for '12403665928' (Q_Inbound_Test) with a duration of 06:53. Below this is an 'All' filter and a 'No history to show' message. The main area features a 'Help' button and the phone number '12403665928'. The call status is 'CALL ON HOLD'. Below this, 'SESSION DETAILS' are listed: ani: 12403665928, dnis: 2035801351, virtualTeamNa...: Q_Inbound_Test, lvrPath: EOI, and pathId: StartCall PlayDone. At the bottom, there are five action buttons: Resume, Consult, Transfer, Conference, and End Call. On the right, a 'CONTACT HISTORY' section is visible but empty.

Active Contact List (1)

Help x 12403665928

12403665928
Q_Inbound_Test
06 : 53

CALL ON HOLD

SESSION DETAILS

ani: 12403665928
dnis: 2035801351
virtualTeamNa... Q_Inbound_Test
lvrPath: EOI
pathId: StartCall PlayDone

CONTACT HISTORY

Resume Consult Transfer Conference End Call

Consulting Request

Active Contact List (1)

12403665928
Q_Inbound_Test
01 : 40

All

No history to show

Consulting Request

Please select consulting method

AGENT

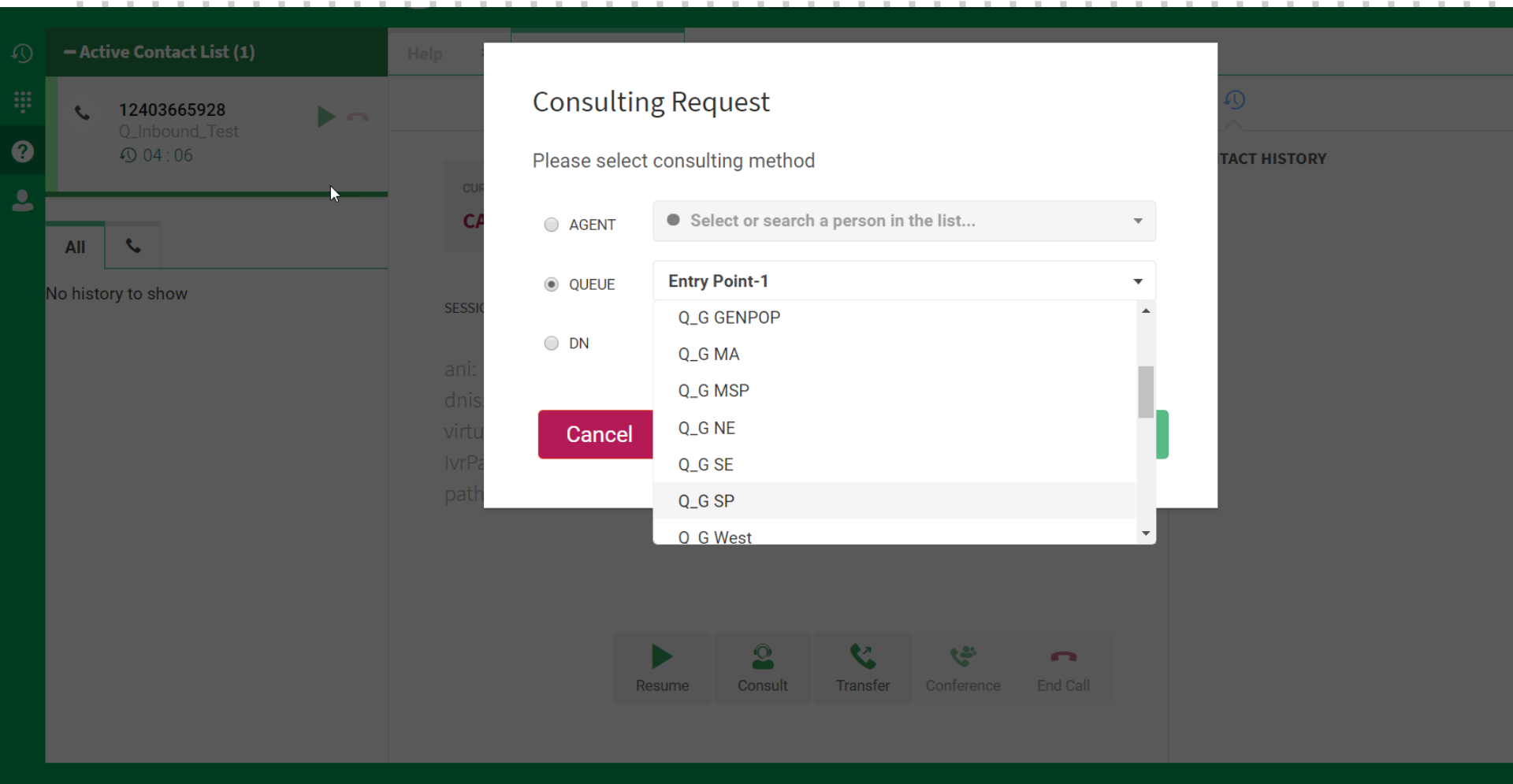
QUEUE

DN

Cancel Consult

Resume Consult Transfer Conference End Call

Consult to Queue



Transferring a Call

Transfer Request

Please select transferring method

- AGENT
- QUEUE
- DN

Cancel **Transfer**

Active Contact List (1)
12403665928
Q_Inbound_Test
09:07

All

No history to show

Resume Consult Transfer Conference End Call

Supervisor Alert

The screenshot displays a Broadsoft contact center interface. A central dialog box titled "Alert Supervisor" is open, featuring a "Custom Message" section with a text input field labeled "MESSAGE". Below the input field are two buttons: a pink "Close" button and a green "Send Alert" button. In the background, the interface shows a contact list with an entry for "12403665928" and a "CONTACT HISTORY" section. A "Sign Out" button in the top right corner is circled in red, with a red arrow pointing to it.

End Call

The screenshot displays a Broadsoft contact center interface. At the top, the Broadsoft logo is on the left, and the user's profile 'Test Agent' with ID '13013051424' and status 'Available' is on the right. A 'Sign Out' button is also present. The main area shows an active call for contact '12403665928' with a duration of '00:07'. The call status is 'CONNECTED'. Below this, session details are listed: ani: 12403665928, dnis: 2035801351, virtualTeamName: Q_Inbound_Test, lvrPath: EOI, and pathId: StartCall PlayDone. At the bottom, a row of call control buttons includes Hold, Consult, Transfer, Conference, and End Call. The 'End Call' button is circled in red, and a red arrow points to it from the right. On the left, there is a sidebar with 'Active Contact List (1)' and a search bar. The Windows taskbar at the bottom shows the time as 12:08 AM on 1/8/2018.

Wrap Up Call

The screenshot displays a contact center interface with a green header. The header includes the Broadsoft logo, a user profile for 'Test Agent' (TA) with ID 13013051424 and role TEST, a status dropdown set to 'Available', and a 'Sign Out' button. The main interface is divided into three sections: an active contact list on the left, a central call control area, and a contact history panel on the right. The active contact list shows one contact, '12403665928', with a 'Q_Inbound_Test' label and a 00:09 timer. The central call control area shows the same contact ID, a 'WRAP UP - 00.09' status, and a '00:11 LEFT' timer. A dropdown menu for 'Wrap Up Reason' is open, showing '-- Select Wrap Up Reason --'. Below this, the 'SESSION DETAILS' section lists call parameters: ani: 12403665928, dnis: 2035801351, virtualTeamName: Q_Inbound_Test,ivrPath: EOI, and pathId: StartCall PlayDone. The right panel, titled 'CONTACT HISTORY', is currently empty.

Header: broadsoft | Test Agent (TA) 13013051424 TEST | STATUS NOW: Available | Sign Out

Active Contact List (1): 12403665928 (Q_Inbound_Test) 00:09

Call Control: 12403665928 | WRAP UP - 00.09 | 00:11 LEFT | -- Select Wrap Up Reason --

Session Details:

- ani: 12403665928
- dnis: 2035801351
- virtualTeamName: Q_Inbound_Test
- ivrPath: EOI
- pathId: StartCall PlayDone

Contact History: No history to show

Outdial

The screenshot displays the Broadsoft interface for a user named 'Test Agent' (TA) with ID 13013051424. The status is currently 'Available'. A dropdown menu is open, showing options: 'Available', 'Default None Chosen', 'Lunch', and 'Meeting'. A red circle highlights the 'Default None Chosen' option, and a red arrow points to it with the text 'Chose an Idle code MUST BE IDLE BEFORE DIALING OUT'. Another red arrow points to the grid icon in the left sidebar with the text 'CLICK HERE FOR OUTDIALING'. The 'My Channels' section shows '1 VOICE CHANNELS'.

STATUS NOW

- Available
- Available
- Default None Chosen
- Lunch
- Meeting

CLICK HERE FOR OUTDIALING

Chose an Idle code MUST BE IDLE BEFORE DIALING OUT

Outdial Key Pad

broadsoft

TA **Test Agent**
13013051424 TEST

STATUS NOW
Available

Sign Out

Campaign Call

Start a new call...

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
*	0 +	#

-- Outdial (Select ANI) --

My Channels

1 VOICE CHANNELS

Outbound Call in Progress

Test Agent 13013051424 TEST STATUS NOW **Default None Chosen**

Active Contact List (1)

- 12403665928 Q_Outdial 00:19

Campaign Call

Start a new call...

1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
*	0 +	#

-- Outdial (Select ANI) --

12403665928

CONNECTED

SESSION DETAILS

ani: 13013051424
dnis: 12403665928
virtualTeamNa... Q_Outdial

Hold Consult Transfer Conference End Call

called, queue used to make call, call duration

Call status

Enter # on dial pad the click the phone

Other Applet Appearances – Loss of Network

The screenshot displays a Broadsoft agent interface. At the top, the header includes the Broadsoft logo, a 'Test Agent' profile with ID 13013051424, and a 'STATUS NOW' dropdown set to 'Default None Chosen'. A 'Sign Out' button is in the top right. The main interface is divided into three sections:

- Left Panel:** Contains an 'Active Contact List (1)' with one entry for '12403665928 Q_Outdial' with a duration of '00:34'. Below this is a 'Campaign Call' button and a 'Start a new call...' input field. A numeric keypad is visible with buttons for digits 1-9, *, 0, and #, along with a dropdown menu for 'Outdial (Select ANI)' and a call button.
- Center Panel:** Shows the current call status as 'CALL ON HOLD'. Below this, 'SESSION DETAILS' are listed: 'ani: 13013051424', 'dnis: 12403665928', and 'virtualTeamName: Q_Outdial'. A large red circle highlights a 'Connection Failure. Trying to recover.' message with a circular progress indicator. Below this message are five call control buttons: 'Resume', 'Consult', 'Transfer', 'Conference', and 'End Call'.
- Right Panel:** Titled 'CONTACT HISTORY', it is currently empty.

Other Applet Appearances – Network Disconnect

The screenshot displays the Broadsoft Agent Desktop interface. At the top, the Broadsoft logo is on the left, and the agent's name 'Test Agent' and ID '13013051424' are in the center. A dropdown menu shows 'Default None Chosen'. Below this, the active contact list shows a call with ID '12403665928' from 'Q_Outdial' at '02:30'. A 'Campaign Call' button is visible. The main area shows the current status as 'CALL ON HOLD' and session details including 'ani: 13013051424', 'dnis: 12403665928', and 'virtualTeamNa... Q_Outdial'. A red oval highlights an error message: 'Couldn't recover! Check network and refresh.' Below the error are buttons for 'Resume', 'Consult', 'Transfer', 'Conference', and 'End Call'. The bottom of the interface shows a numeric keypad and a dropdown menu for 'Outdial (Select ANI)'. The footer contains the copyright notice: 'Copyright © 2017 Broadsoft - Agent Desktop v 2.0.0.45. All rights reserved.'

Applet Help

The screenshot displays the Broadsoft Test Agent interface. At the top, the Broadsoft logo is on the left, and the user's profile 'Test Agent' with ID '13013051424' and role 'TEST' is in the center. A 'STATUS NOW' dropdown menu is set to 'Default None Chosen'. On the far right, there is a 'Sign Out' button. The main interface is divided into three sections: a left sidebar, a central content pane, and a right pane. The sidebar contains a 'No history to show' message and a help icon (a question mark in a circle) highlighted with a red circle and arrow. The central pane shows a 'Contents' menu with items like 'Getting Started', 'Working in the Agent Desktop', and 'Handling Voice Contacts'. The right pane displays the 'Getting Started' help page, which includes an introduction to the CC-One Agent Desktop, a note about voice interactions, and a list of topics covered in the section: 'Agent Desktop Prerequisites', 'Logging in to the Agent Desktop', and 'Logging out of the Agent Desktop'. A copyright notice at the bottom of the right pane reads: '© 2005 - 2017 BroadSoft, Inc. All rights reserved. Any product names mentioned in this document may be trademarks or registered trademarks of BroadSoft or their respective companies and are hereby acknowledged.'

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Operational Procedures to Remember

- Agents must be provided with url and login information (check email for initial credentials)
- Agents must know phone number where they are sitting
- Phone numbers should be entered as numeric only (no dashes)
- Agent use of Idle state
 - before leaving their desk
 - before placing outbound calls
 - when taking non-call center calls
- If you have problems logging in or issues in the system, always start with closing browser and clearing cache.

Agent Practice Assignment

To practice with the agent applet find a partner (*though you can do this by yourself if you won't get too confused playing both roles*) –

one of you play "CUSTOMER" while the other plays "AGENT".

Both you and your partner will need a phone – if you are playing "BOTH" roles – you will need "2" phones.

If you are the Customer –

Dial **TEST NUMBER HERE** (test # for EP_TEST "Practice Entry Point")

You will hear a greeting – then call will be sent to an agent or queue

If you are the Agent – Login to the Agent Applet and "STAY IN IDLE"

1. Place an "outdial" call to any person of your choosing using a 10 digit number; connect with the person then hang up
2. "Wrap" your last call

NEXT "Go Available" to receive the call from "the customer"

After you receive the call from "the customer" – Practice the following:

1. Put call on hold then remove from hold
2. Put call on hold then "consult" with any person of your choosing by placing an "outdial" call using a 10 digit phone number.
3. "Conference" together the "customer" and the person you are "consulting" with
4. Inform the customer you are about to "warm transfer" them
5. "Transfer" your customer to the person you just "consulted" with
6. "Wrap" your last call

Questions?



Thank You!

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