# Veracity CC-One Agent Training

Veracity Networks
May 2018

**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)

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# 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/

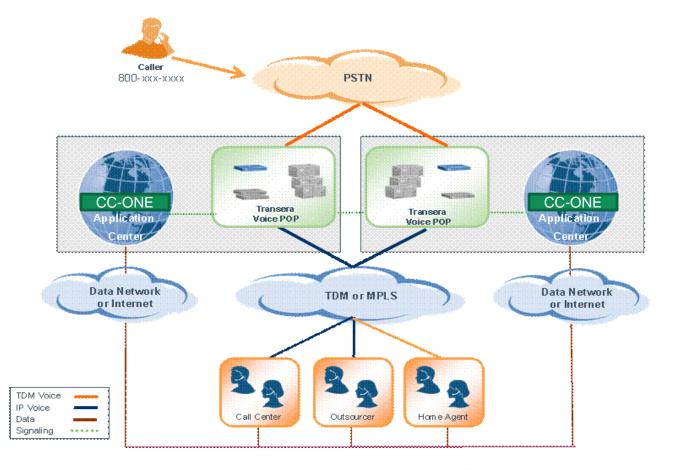- Identify the version of flash installed by launching : http://www.adobe.com/software/flash/about/

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# Service Overview

# What is Broadsoft CC-One?
## CC-One is a virtual ACD located in the network

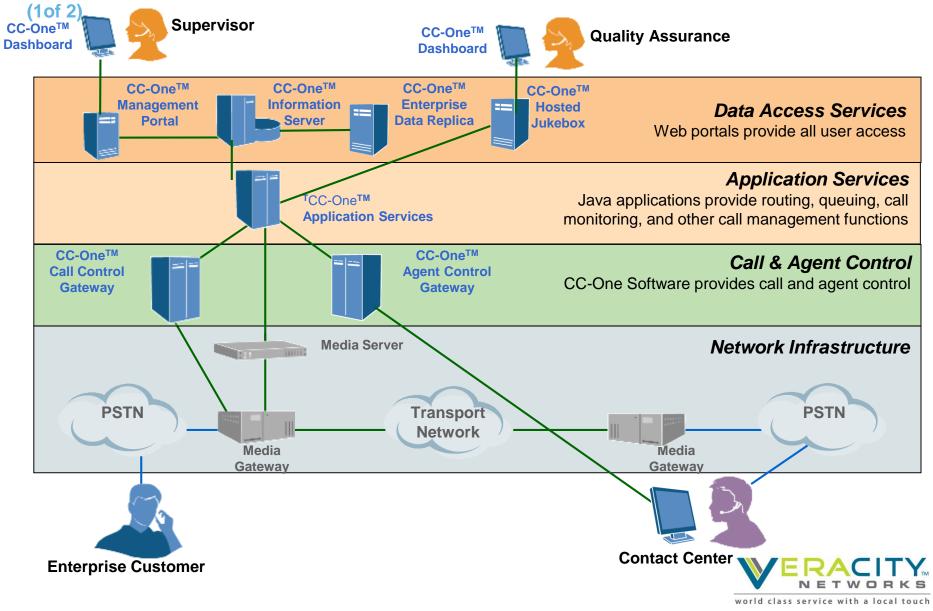- CC-One provides "mid-point" call control

# 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?



**(1of 2)**

CC-One™ Dashboard — Supervisor

CC-One™ Dashboard — Quality Assurance

CC-One™ Management Portal

CC-One™ Information Server

CC-One™ Enterprise Data Replica

CC-One™ Hosted Jukebox

**Data Access Services**
Web portals provide all user access

CC-One™ Application Services

**Application Services**
Java applications provide routing, queuing, call monitoring, and other call management functions

CC-One™ Call Control Gateway

CC-One™ Agent Control Gateway

**Call & Agent Control**
CC-One Software provides call and agent control

Media Server

**Network Infrastructure**

PSTN

Media Gateway

Transport Network

Media Gateway

PSTN

Enterprise Customer

Contact Center

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# What are the CC-One 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

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Introduction

# Agent Training

# Launching the Console

- **HTML Agent Applet Portal URL**
  - ➢ https://portal.ccone.net

# Initial Deployment of Console



Click on this icon to open

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!

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# Agent Login

# Go Available to Receive Calls

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

# Receiving an incoming call

# 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 | 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.<br><br>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. |

| 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 | The call has ended. You are prompted to enter Wrap Up codes before taking another call. See Wrapping Up Voice Communications.<br><br>While in the Wrap Up state, you cannot receive a routed or transferred contact card. |

# Window Controls and Indicators

# Placing Call on Hold

# Consulting Request

# Consult to Queue

# Transferring a Call

# Supervisor Alert

# End Call

# Wrap Up Call

# Outdial

# Outdial Key Pad

# Outbound Call in Progress



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TA **Test Agent**
📞 13013051424   ▥ TEST

STATUS NOW
● **Default None Chosen** ▾

— Active Contact List (1)

📞 12403665928
Q_Outdial
🕐 00 : 19

**# called, queue used to make call, call duration**

📞 12403665928

CURRENT STATUS
**CONNECTED**

**Call status**

SESSION DETAILS

ani:            13013051424
dnis:           12403665928
virtualTeamNa... Q_Outdial

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) --   ▾

📞

**Enter # on dial pad the click the phone**

|| Hold    🧑 Consult    ↗ Transfer    👥 Conference    📞 End Call

# Other Applet Appearances – Loss of Network

# Other Applet Appearances – Network Disconnect

# Applet Help

# Operational Procedures to Remember

- Agents must be provided with url and login information (check email for initial credentials)

- Agents must know phone number <u>where they are sitting</u>

- 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** <u>Customer</u> **–**

**Dial** <u>***TEST NUMBER HERE***</u> **(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** <u>Agent</u> **– 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 <u>any person of your choosing </u>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

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# Questions?