88 8x8, Inc.

Virtual Contact Center

Release Notes

Version 8.4
Revision 1.0

Contents

About the Release 8.4

In this release, 8x8 unites the customer service power of Virtual Contact Center with the global communication power of 8x8 Virtual Office phone system.

The key features are:

- Unified Sign-On: Ability to log in to all 8x8 applications with a unified sign-on. For example, if you subscribe to multiple 8x8 services such as Virtual Office, Switchboard, Analytics, etc., access all these applications with a unified login. Navigate to the unified sign-on URL, login.8x8.com, and log in with your credentials. The Application Panel launches showing all the available end points. You do not have to log in to each application separately.

Administrators for VO-VCC tenants have the following capabilities:

- Ability to add VCC agents: You can create user profiles in 8x8 Account Manager and assign these users the privileges of a VCC agents.

- Ability to add VCC administrators: Assign users the privileges to function as administrators who can manage the contact center and/or the PBX functionality.

- Ability to assign VCC Dedicated Extensions: The hardware extensions are dedicated to exclusively handle inbound and outbound call traffic for agents. They must be associated with a VCC agent to workplace phone setting to receive, place, transfer, or conference calls using the extension. Emergency services are not available with VCC dedicated extensions.

- Manage Phone Channels and Scripts: Using IVR scripts, you can define the inbound dialing experience for customers and direct them to the right skilled agent quickly.

- Enhanced VCC Dial Plans: VCC dial plans handle private PBX numbers in addition to full public numbers. The users are able to use system variables and create user variables.

Agents serving in VO-VCC integrated tenants have the following benefits:

- Shared Directory: Provides a company directory with both VO and VCC users and services. Directory entries are managed through Account Manager.

- Shared Presence: The status of users (VCC agent or VO extension user) are reflected in both Agent Console and Virtual Office client applications.

- VO-VCC Extension Dialing: Users can call extension users between Virtual Contact Center and Virtual Office using extension numbers. This release supports click-to-call dialing and call transfers between contact center agents and other users in the enterprise. Agents can get insight from experts, or connect the customer and the expert directly.

- Instant Messaging: The extensions users can chat with each other and with agents.

Unified Sign-On

The VO-VCC integration offers administrators, agents, and extension users the ability to sign in once and access all 8x8 applications. This eliminates the need to log in to each application separately.

1. Navigate to https://login.8x8.com/

2. Enter the 8x8 username and password and click **Log In**.
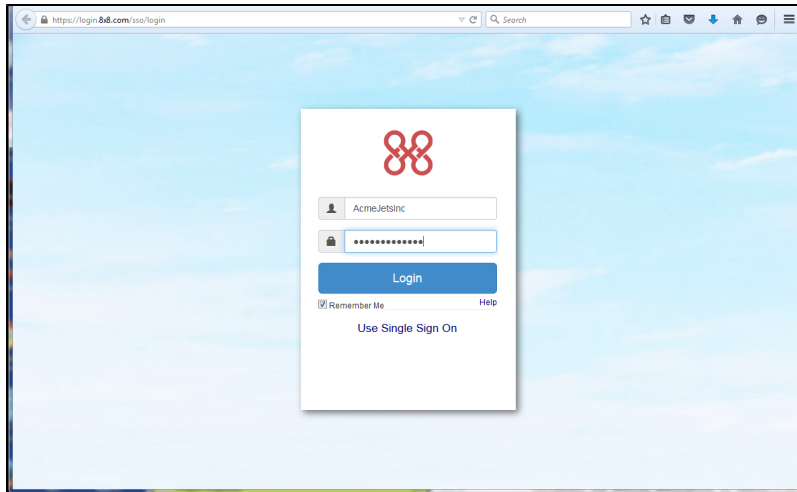
3. The 8x8 application panel launches listing all the applications available to you.
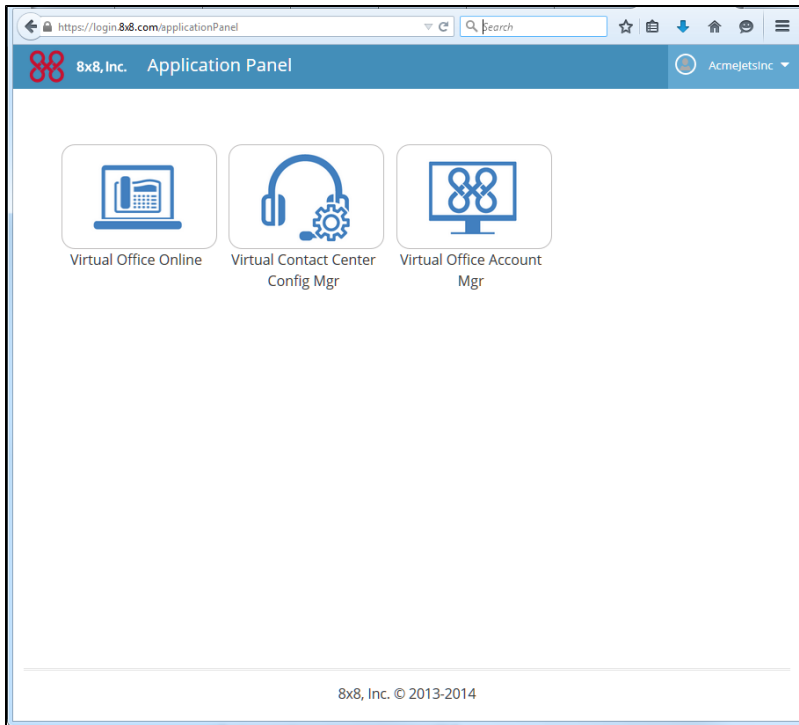
4. Select the desired application to launch.

VO-VCC Users

Users in Virtual Contact Center are grouped into:

- **Agents**—Agents handle customer interactions channeled through the contact center. Virtual Contact Center supports regular agents and supervisor agents. Supervisor agents have the ability to monitor agent activity and to adjust their participation in queues.

- **Administrators**—Administrators configure the contact center's resources and behavior. An administrator can be a Primary administrator with unrestricted access to all the configuration objects, or a Secondary administrator with full or partial configuration rights.

Account Manager allows you to create user profiles and assign them with agent or administrator privileges for Virtual Contact Center.

About User Profiles

In VO-VCC, creating user profiles and setting password policies are managed in Account Manager. A User Profile is required to identify users with access to your 8x8 system. When creating a new User Profile the User Name must be globally unique. By default a user's email address is copied into the User Name field. If this email address is not unique within 8x8, or you wish to create a user name of your own, you must choose a User Name that has never been used before. The system advises you if a duplicate exists at the time of creating the profile.

After creating a user profile, you can associate 8x8 services and general permissions to it. Typical assignments include physical and virtual extensions as well as VCC agent or administrative privileges.

The following fields are mandatory for user profile:

- First Name
- Last Name
- Email Address
- User Name (must be unique)

Note: When creating a new user profile, the user name appears the same as the email address by default. The system administrator has the flexibility to change the user name to something other than the email address.

You can create user profiles one at a time or in bulk. To create a single user profile refer to Create a User Profile in Adding Agents. Follow the instructions below to create multiple user profiles.

To Create Multiple User Profiles

1. Log in to Account Manager.

2. Navigate to **Accounts** tab.

3. Select **User Profiles**.

4. Click **Download CSV Template**.

   It downloads an Excel file that stores the user profile information.

5. **Save** the file to your computer hard drive once you have made all your changes.

> **Note:** Do not make any changes to the 8x8 Internal ID column.

6. On the User Profile page, click **Upload CSV Template**, then **Proceed**.

7. Click **Add** and then locate the file you just saved.

8. Click **Open**, then **Upload**.

9. Verify that the new information is correct and click **Submit**.

To change user profile password

1. Log in to Account Manager.

2. Navigate to **Accounts** tab.

3. Select **User Profiles**.

4. Find the agent from the list and click **Reset Password**.

5. The **Reset Password** confirmation window opens.

Check the user ID and email address and click **Send Email**.

6. An email is sent to the agent's address in user profile. To change the password, the agent has to click the link provided in the email and follow the instructions.

The new password requires at least one upper case letter and one numeric digit. In the Reset Password window, hover your mouse over the question mark to see the requirements.

Password should have
- at least one uppercase letter,
- at least one lowercase letter,
- at least one numeric digit,
- at least one special character from the set (~!@#$^*-+=|:.?<>&)
- minimum of 8 and maximum of 25 characters and
- no white space.

Additionally, password should also be
- different from user name.

Required characters for password

New password

Confirm new password

Submit   Clear

Return to Log in

Adding Agents

The process of adding a Virtual Contact Center agent involves two steps:

- Step 1 in Account Manager: Create a user profile
- Step 2 in Configuration Manager: Specify properties for users

Follow the procedure below to add a Virtual Contact Center agent.

Step 1: Create a User Profile

If you have created users already, you can edit their user profiles in Account Manager to make them VCC agents. Alternatively, you can create new user profiles for VCC agents.

To create a user profile:

1. Log in to Account Manager.
2. Navigate to **Accounts** tab.
3. Select **User Profiles**.

4. Click **Create New User Profile**.

5. Enter first name, last name, and email address.

   The user name is populated as soon as you enter an email address. You can change the user name but it must be unique.

6. Select the **VCC Agent** check box.

   Every VCC agent must be assigned a VCC agent primary extension number which can be dialed by VO or VCC users to call this agent. This extension number is displayed in the directory with presence. Once you select the VCC agent check box, you have to select at least one VCC extension, or you are not be able to save the user profile.

   Types of VCC Extensions

   There are two types of VCC Agent Primary Extension numbers:

   - **VCC Agent (Virtual) Extension—**This type of VCC agent extension number is not associated with a physical 8x8 phone. The single extension number is linked to one VCC agent channel script. See here to learn how to assign a virtual number.

- **VCC Dedicated Extension—**If you select a physical extension, the extension and Direct-in-Dial (DID) numbers are permanently redirected to VCC agent channels. The physical extension becomes a slave controlled exclusively by VCC. You can control it only via a VCC agent's web control panel and the workplace phone setting. With VCC dedicated extension, the agent may be able to receive inbound calls (depending on the script) but cannot make outbound calls without logging in to VCC as an agent or supervisor.

> **Note:** VCC Dedicated Extension does not support emergency calling.

With either VCC extension type, anyone calling an agent's extension or DID number receives VCC channel treatments as defined by the VCC agent's channel script(s).

You must assign a virtual VCC agent extension, using steps below, or go here to find out how to assign a VCC dedicated extension as your agent's VCC agent primary extension number.

7. Click **Add VCC Agent Extension**.

The Add Extension window appears. If an extension is previously assigned to this user profile, it is automatically populated in the extension field. See how to assign a physical extension to a user profile.

8. If there is no physical extension for this user profile, click auto suggest [icon] for the system to suggest an extension. You can only get a virtual extension using the auto suggest.

9. Click **Add**.

The extension number becomes the VCC agent primary extension.

10. Click **Save**.

How to assign a physical extension to a user profile?

   To assign a physical extension to a user profile

1. Log in to Account Manager.

2. Navigate to **Phone System** tab.

3. Click **View All Extensions**.

4. Select an available extension from the list and click **Edit**.

The Edit Extension page opens.

5. Click the **Select User Profile** link.

   A window appears showing all available user profiles.

6. **Select** a user profile from the list. The extension number is now assigned to that user profile.

7. Click **Save Changes**.

   For a physical extension to become a VCC dedicated extension, you must select it as VCC Agent Primary Extension when creating a user profile. In the following example, 1001 is selected as the VCC agent primary extension and has a dedicated Polycom phone associated with it. See Create a User Profile for more details.

Note: You can also create a new user profile using **Phone System > View All Extensions > Manage Extensions > Edit Extension**, but for best practice, go to

> **Accounts > User Profiles** to create a user profile and then use the **Phone System** to assign a physical extension to the user profile.

If you have an existing user who is not a VCC agent, you can edit the agent's user profile to make it VCC agent.

To edit an existing user profile

1. Log in to Account Manager.
2. Navigate to **Accounts** tab.
3. Select **User Profiles**.
4. Find a user from the list and click **Edit**.
5. Select **VCC Agent** check box.
6. Click **Add VCC Agent Extension**.
7. The Add Extension window appears. If an extension is previously assigned to this user profile, it is automatically populated in the extension field. See how to assign a physical extension to a user profile.

8. If there is no physical extension for this user profile, click auto suggest ⊞ for the system to suggest an extension. You can only get a virtual extension using the auto suggest
9. Click **Add**.

   The extension number becomes the VCC agent primary extension. In the following screenshot, the extension 1001 is the VCC agent primary extension and the physical phone is transformed into a VCC Dedicated Extension.

10. Click **Save**.

Step 2: Specify properties for users

After you mark a user as VCC agent and assign an extension to the agent's user profile, you need to configure properties for the agent in the Configuration Manager. Agents created in Account Manager show up in Configuration Manager and under **Users**. A default group, called **ungroup**, is assigned to all agents. You can create a new group later and use it instead of the default group.

To configure a user account properties:

1. Log in to Configuration Manager.

2. Navigate to **Users**.

   If you have selected the VCC Agent check box in Account Manager, you see the agent in the list.

3. Find the Virtual Contact Center agent you added and click [pencil icon] or **Edit** .
   General tab appears.

> **Note:** First Name, Last Name, Email Address, Username, Password, and Login ID fields are inherited from user profile in Account Manager. You cannot edit them here.

4. Click **Agent Group** drop-down list to change the agent's group. The agent's group is **ungroup** by default.
   You can create agent groups by navigating to Groups page in Configuration Manager.

5. Click **Save**.

   For detailed configuration guide refer to Configuration Manager.

6. Go to **Phone** tab.

7. Enter the agent's **Workplace phone** or **Workplace SIP URI** at which the agent wishes to be reached.

   OR,

   you may allow the agent to set this parameter. The workplace phone number can be set to any physical extension number or a DID number as needed. The workplace phone cannot be set to any channel numbers in the tenant except a VCC Dedicated Extension number. The workplace SIP URI is used when the agent has an 8x8 approved soft phone installed on their workstation.

8. Select **Enable in IVR** check box if you wish this VCC Agent extension number to be recognized in the IVR during a Menu or Get Value input operation.

   Note that the **Primary Agent Directory Number** field is automatically populated with the agent's extension number.

   > **Note:** In the **Channels and Scripts linked to this Agent** table, if the extension number is a physical extension such as 3002, both Public Number and PBX Number appear in the table. However, if the extension number is a virtual extension such as 6002, none of those fields are populated in the table since there is no corresponding DID assigned with this extension number.

9. Click **Save**.

Adding Administrators

When a Virtual Contact Center order is placed, the primary administrator is created in both Configuration Manager and Account Manager. The Primary administrator is then marked with a yellow star in Account Manager Privileges. The Primary administrator has complete account access; other administrators cannot

delete or revoke privileges from the Primary administrator. However, you can create users in Account Manager and provide administrator privileges to them. These users become Secondary administrators.

The process of adding a Virtual Contact Center administrator involves three steps:

- Step 1 in Account Manager: Create a user profile
- Step 2 in Account Manager: Assign Privileges
- Step 3 in Configuration Manager: Specify Administrator properties for users

Step 1: Create a User Profile

If you have created users already, you can use the User Profiles tab in Account Manager to make them secondary admins. You can also create new user profiles and configure them as VCC admins. You must assign a logical extension if you want the user profile to have the VCC agent capabilities. Refer to Create a user profile for agents to find more about creating VCC agents.

To create a user profile:

1. Log in to Account Manager and navigate to **Accounts** tab.
2. Select **User Profiles**.
3. Click **Create New User Profile** and enter the user information.
   The user name is populated as soon as you enter an email address but can be edited. You can change the user name. It must be unique.


4. Ensure that VCC Agent check box is NOT selected and click **Save**.
   The new user profile is created and listed under the User Profiles in Account Manager.

Step 2: Assign Privileges

You must assign or update privileges to users in order to make them secondary administrators.

To assign privileges:

1. In the Account Manager navigate to **Accounts** tab.

2. Click **Privileges** on the left.

3. Click **Assign New Privileges** link.
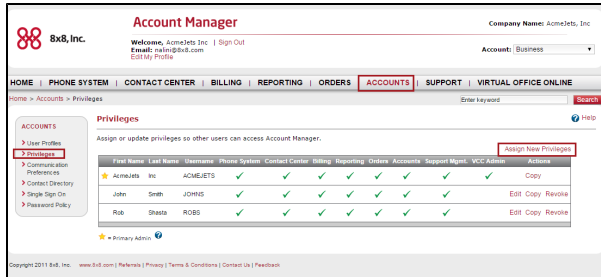
4. Select the profile you created in Step 1.
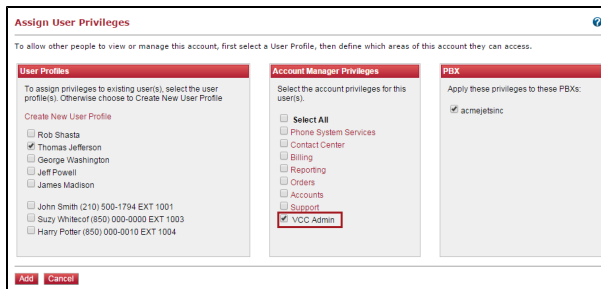
5. Select **VCC Admin** privileges.

6. Select all **Account Manager Privileges** or the ones that apply.

7. Select a **PBX** from the list.

8. Click **Add**.

    The new user is added to the Configuration Manager Administrators list.

    you can use an existing user's profile as a template and copy the privileges for the new user.

To copy privileges:

1. In the Account Manager navigate to **Privileges** tab.

2. Select a user profile you want to use as a template and click **Copy**.
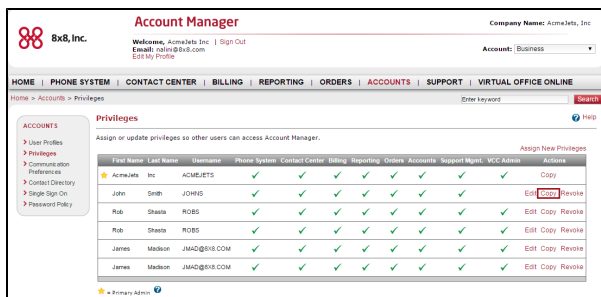
3. Select an existing user profile from the list that you want to copy the privileges to, or create a new one.

4. Click **Copy**.

Step 3: Specify Administrator Properties for Users

After you create a VCC administrator and assign privileges, you need to configure properties for the administrator in the Configuration Manager. Agents created in Account Manager show up in Configuration Manager. A default group, called **Tenant Default**, is created and assigned to all agents. You can edit the default group and select the software language.
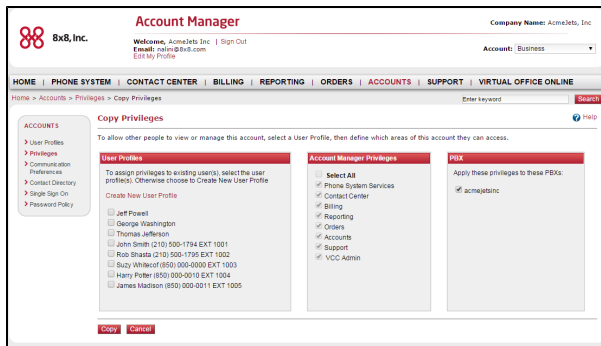
To configure an administrator:

1. Log in to Configuration Manager.

2. Navigate to **Users**.

   The new administrator appears under the Admins list with a ✔ next to it. The secondary admin is indicated with (2).

3. Find the Virtual Contact Center admin you added and click 🖊 or **Edit** .
   The administrator's information such as name, email, login ID, workplace and SIP phone appears.
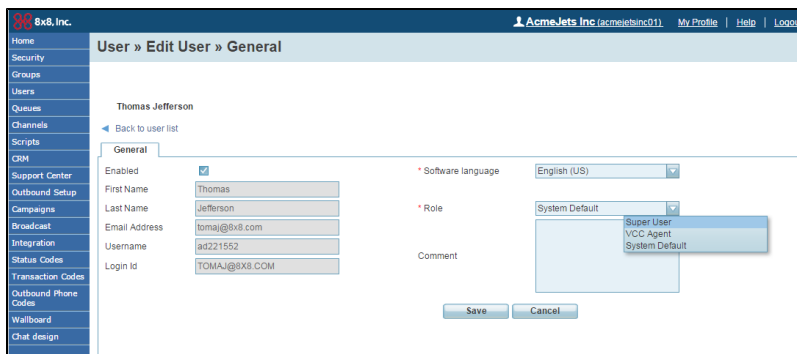
> **Note:** First Name, Last Name, Email Address, Username, Password, and Login ID fields are inherited from user profile in Account Manager. You cannot edit them here.

4. The administrator is assigned the **Tenant Default** role by default. If you have created another role, select it from the drop-down list. You can create roles by going to **Security > Roles**.

5. Click **Save**.

    For detailed configuration guide refer to Configuration Manager guide.

Phone Channels

A Phone channel processes inbound phone interactions in a Virtual Contact Center tenant. A tenant can have two types of phone channels:

- **Service channels**—Service channel is a regular phone channel associated with a telephone number. It is automatically created when a number is ordered for the tenant through provisioning. You can edit a service channel or enable/disable it in Configuration Manager.An ivr script is linked to the service channel by default.

- **Agent channels**—Agent channel is associated with VCC agents and automatically created when you create a VCC agent in Account Manager. You can edit an agent channel or enable/disable it in Configuration Manager. An ivr script is linked to the agent DID and agent PBX extension by default. The administrator can create a custom script and configure it for the agent.

Both types of channels, Service and Agent are listed under **Channels** in the Configuration Manager.

To assign a new script to the agent:

1. Log in to Configuration Manager.

2. Navigate to **Users**.

3. Find the agent in the list and click or **Edit** .

4. Go to the **Phone** tab.
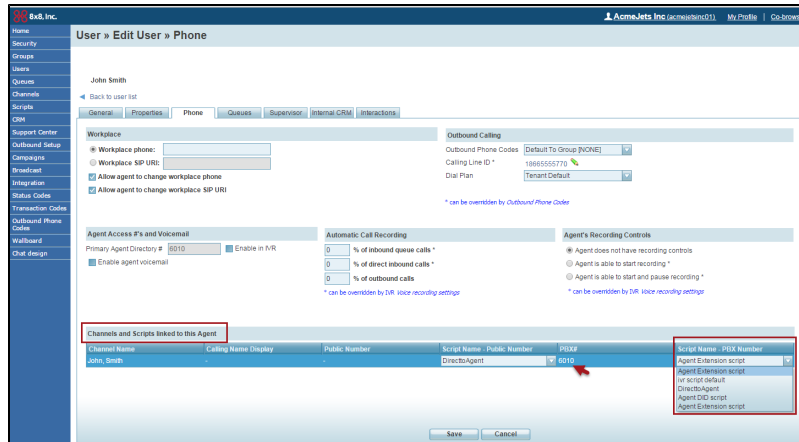
5. Under **Channels and Scripts linked to this Agent**, click the script name for Public or PBX number.

   A drop-down box appears with all the available scripts in tenant.

6. Select a script from the list.

7. Click **Save**.

Phone Scripts

The phone Interactive Voice Response (IVR) guides the inbound callers through the options to the desired agent within the contact center. The phone script is designed for the agents to choose when the calls are transferred to them. The default scripts associated with DID or PBX extension numbers are to transfer the calls to the agent whether offline or logged in. The administrator can edit the default script to configure it per agent's work schedule. For example, the calls can be transferred to the VCC agent when the agent is busy, but not when the agent is logged off or on break.

To change the transfer to agent options

1. Go to Configuration Manager.

2. Navigate to **Scripts** .

3. Locate the agent script you like to change and click   .

4. Open **Script** tab.

5. Click the first line: **Transfer to Agent**.
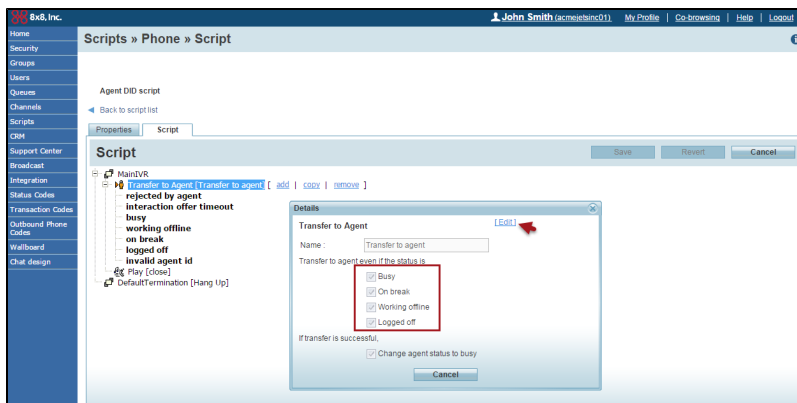
6. Click **Edit** in the Details window.

7. Change the settings to modify the **Transfer to agent** options.

8. Click **OK** to close the Details window.

9. Click **Save**.

To change or assign new channels to your script

1. Go to Configuration Manager.

2. Navigate to **Scripts** .

3. Locate a script that you want to assign new channels to and click [pencil icon].
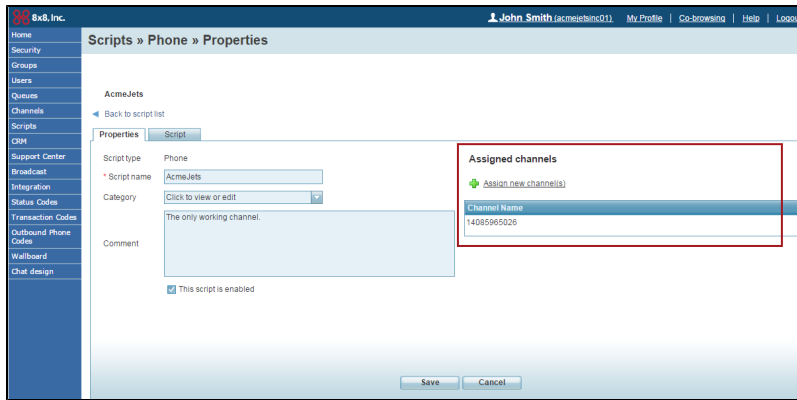
4. In the **Properties** tab, channels associated to this script are listed under Assigned Channels. Click **Assign new channels**.
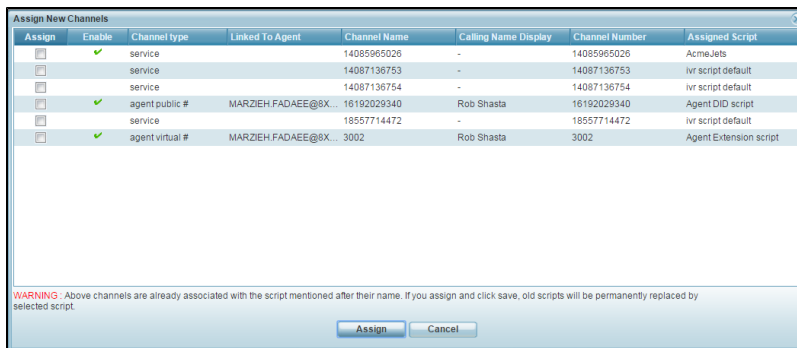
5. Select a Service or agent channel from the list and click **Assign**.

> **Warning:** All channels in the list are associated with a script whether default or user-defined. If you assign and save a new script, the old script is permanently replaced by the new selected script.

6. Click **Save**.

Dial Plan

VCC dial plans now handle private PBX numbers in addition to full public numbers. New system dial plans are equivalents to prior system dial plans with added support for PBX number dialing. In the new system dial plans, International Numbering Plan (ITU-T E.164) no longer allows unfiltered pass-through dialing. Dial Plans take numbers dialed by users, or numbers originating from other VCC components, IVR callback, web callback, click-to-dial, workplace phone, etc. and apply editing rules to yield one of the following:

- A valid global public phone number (known as E.164)

- A valid PBX number

- A call disallowed message number

- A warning tone generating number

Features

• Ability to change the order of the rules using drag and drop

• Ability to use private PBX numbers

• Ability to use system variables and user-defined variables

• Dial plan editing results are no longer automatically prefixed with a plus (+) sign

Built-In System Dial Plan Rules

A set of new system dial plan rules are designed for VOVCC tenants. Users cannot edit the system default dial plans, but they can copy a rule and edit it based on their needs.

To copy a rule:

1. Log in to Configuration Manager.

2. Navigate to **Home**.

3. Go to **Dial Plans** tab.

4. Click **Copy** next to a default system rule that you wish to modify.

   A message appears asking you to click Save to keep a copy.

5. Click **OK**.

   The Dial Plan creates a copy of the default plan.

6. Enter a new name for the **Dial Plan**.

7. Click **Save**.

   A copy of the default dial plan is created and added to the list of available dial plans. You can modify the new dial plan according to your tenant needs.

System Variables

In VOVCC, a set of new variables are introduced in dial plan:

System Variable	Used for
$PBXID	VOPBX ID/Name
$TENANT	Tenant name
$AGENTLOGIN	Agent username if available for the call
$ORIGNUMBER	Original dialed number

For example, using $PBXID variable in your dial plan rule allows you to call any extensions in the PBX that has seven digits or less:

Dialed String Match Pattern	Rewrite Translation	Rule Comment
^([0-9]{1,7})*$	$1-$PBXID	Send 7 digits or less to the host PBX of tenant

> **Note:** E.164 system dial plan is no longer a pass through. New rule is added to validate dialing number.

User Variables

Users can create variables based on their specific needs.

For example, the user can define SET MYAREACODE variable below for his area code. When he enters a telephone number, the system dials the area code (1510) first and then dials the number.

Dialed String Match Pattern	Rewrite Translation	Rule Comment
SET MYAREACODE	1510	my area code
^([1-9][0-9][0-9][0-9][0-9][0-9][0-9])$	$MYAREACODE$1	add area code
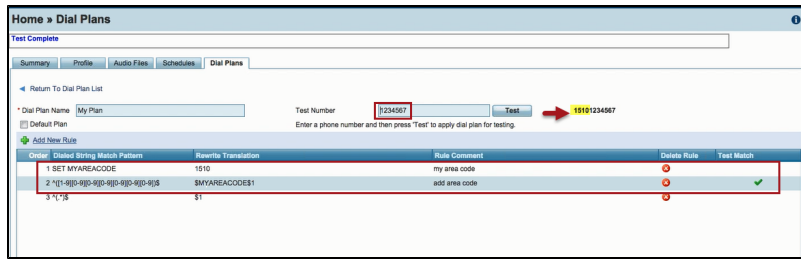
To see what dial plan rule is currently applied in your tenant

1. Log in to Configuration Manager.

2. Navigate to **Home**.

3. Go to **Dial Plans** tab.

4. Click ![pencil] or **Edit** to open the rules.

5. Enter a number in the Test Number text box and press **Test**.

   A green check mark appears next to the dial plan rule that is applied in your tenant.
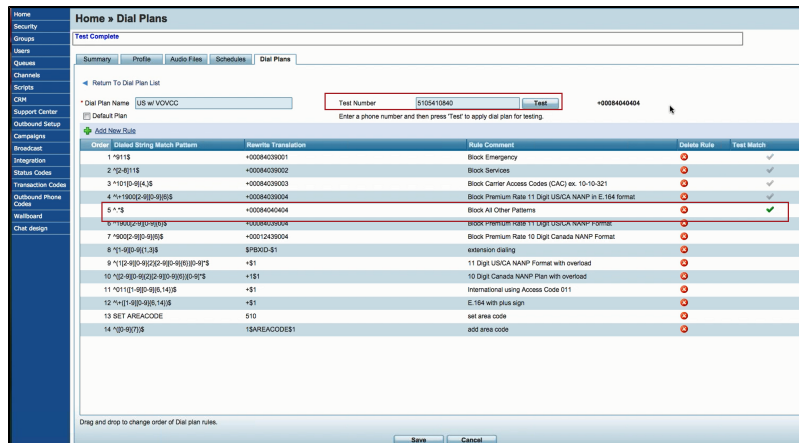
How to change the order of rules?

1. Log in to Configuration Manager.

2. Navigate to **Home**.

3. Open **Dial Plans** tab.

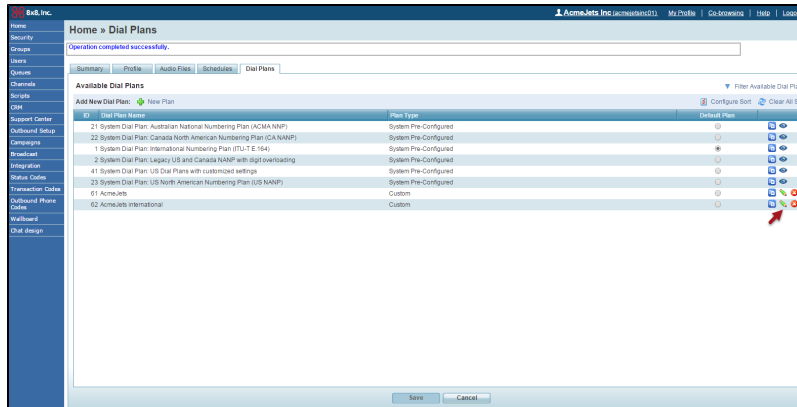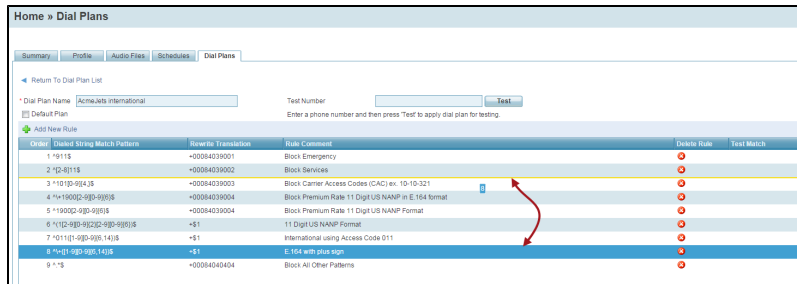4. Click ![pencil icon] or **Edit** to open a rule.

5. Click to select the custom rule and drag it to the desired location.

6. Click **Save**.

> **Note:** You cannot edit system dial plans.
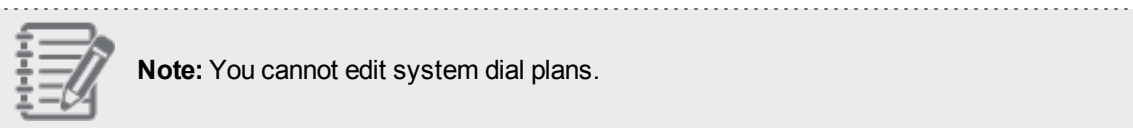
Backward Compatibility

- All prior dial plans are automatically adjusted to compensate for the plus (+) sign change.

- The original International Numbering Plan (ITU-T E.164) allowed any digit sequence starting with a plus (+) sign to pass through without any digit modifications. The updated equivalent dial plan now includes E.164 number validity checks along with some special and premium number blocking. In some cases, users of this plan may experience a change of behavior if their customary dialing included non E.164 number patterns.

Functioning as a Virtual Contact Center Agent

With VO-VCC Integration, Virtual Contact Center agents have the following benefits:

- ## Shared Directory

  Access the company directory from Agent Console that lists all extension users including VCC agents. Communicating with these users is just a click away.
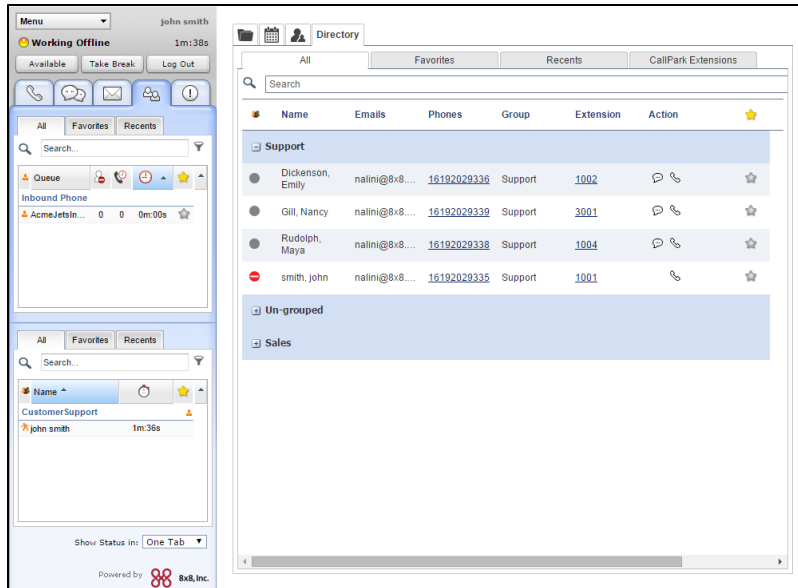
- ## Shared Presence

  Check the status of other extension users before contacting them. The Directory tab in Agent Console lists all extension users with their status set in Virtual Office client application. Similarly, you can view the status of agents or other extension users from Virtual Office Desktop or Virtual Office Online.

  > **Note**: The status shown in the Directory tab in Agent Console is retrieved from Virtual Office application and not from Agent Console.

- ## Extension to Extension Dialing

  Click to dial a call to other extension users using their extension numbers from the directory in Agent Console. You can also use instant messaging to chat.
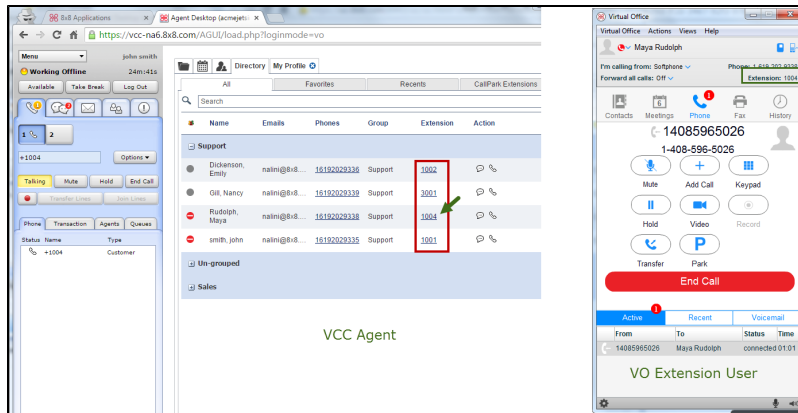
- ## Dedicated Extension

Handle call center traffic via a dedicated desk phone. The Virtual Contact Center agents can now be assigned with dedicated desk phone. These dedicated extensions are meant exclusively to handle inbound and outbound call traffic for agents. You cannot receive, place, transfer, or conference calls using the extension by itself. This helps in tracking and monitoring contact center traffic.

> **Note**: VCC dedicated extension does not support emergency calling.
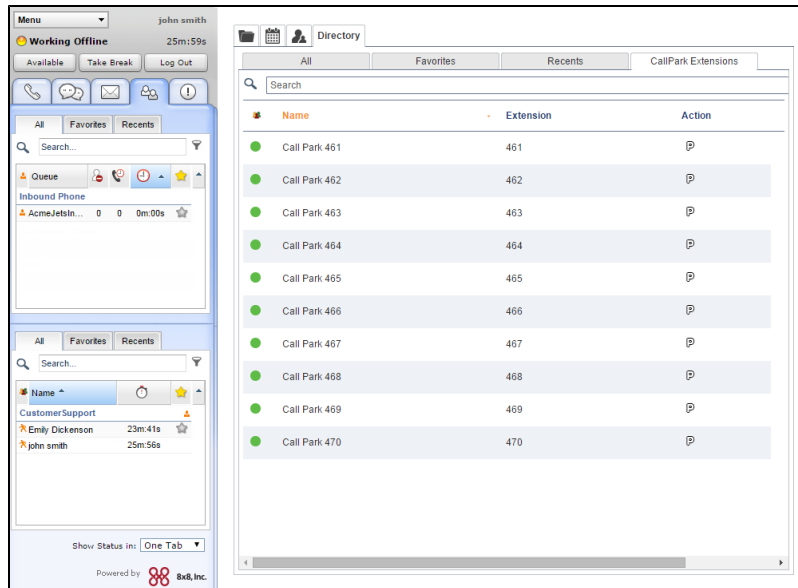
- ## Call Parking

Connect the customer with the right skilled agent using Call Parking. Call Parking allows agents to park a call to be retrieved by another agent or extension user who may be currently busy. When the agent parks a live call on an available parking extension, the caller hears call park music. He can then inform the other agent/extension user about the parked call and the parking extension number via chat. The other user can retrieve the call by clicking on the parked extension.

> **Note**: A call that is parked longer than five minutes is offered back to the same agent who parked the call.

To park a call:

1. During a live call, navigate to the Directory tab in Agent Console.

2. Select the **CallPark Extensions** tab.

3. From the list of call parking extensions, select an available extension.

   The status of call parking extension is indicated by green (available) or red (busy). You can only park one call at an extension.

4. Inform the other agent/extension user about the parked call via chat.

   To retrieve a parked call:

1. Navigate to **Directory > CallPark** Extensions tab.

2. Accept the call by clicking on P or dial the parked extension # to retrieve the call.