8x8, Inc.

Virtual Contact Center

Direct Agent Routing

Version 8.1

Revision 2.0

The Champion
For Business
Communications

Contents

Direct Agent Routing

Direct Agent Routing(DAR) in 8x8 Virtual Contact Center provides callers a faster and easier way to reach desired agents directly bypassing hoops of menu choices. The newly introduced objects in IVR support direct agent routing and last agent routing. Last Agent Routing facilitates routing a call to the agent who handled the case previously based on case Id.

The newly introduced objects and enhancements for Direct Agent Routing are:

- **Get Value** (Extension Number) – Capture an agent's assigned extension number and validates if it points to an agent.
- **Set Agent**: Looks up agents based on their association with caller ID, case ID and channel
- **Transfer to Agent**: Transfers a call to an agent
- **Transfer to Agent Voicemail**: Transfers a call to an agent's voicemail.

For detailed description of these objects and respective parameters, refer to the Release Notes or Configuration Manager Guide.

Scope

This document describes a few use cases and guides IVR script administrators on how to craft scripts using the new DAR objects. The document also discusses how to migrate existing scripts with Direct Agent Access from 8.0 to 8.1.

Use Case 1 – Agents share their Direct in Dial with customers

AcmeJets Inc requires its agents in Support Organization to maintain a direct relationship with established customers so they can contact agents quickly avoiding the delay of menu based routing. To enable this, agents share their direct numbers with customers. These phone numbers serve as phone channels dedicated to individual agents in your contact center.

At the same time, the sales agents must handle calls from new sales leads that are channeled through queues, which are offered to agents based on their status and agents with longest interval between queue calls.

The following flowchart gives an overview of the call flow.
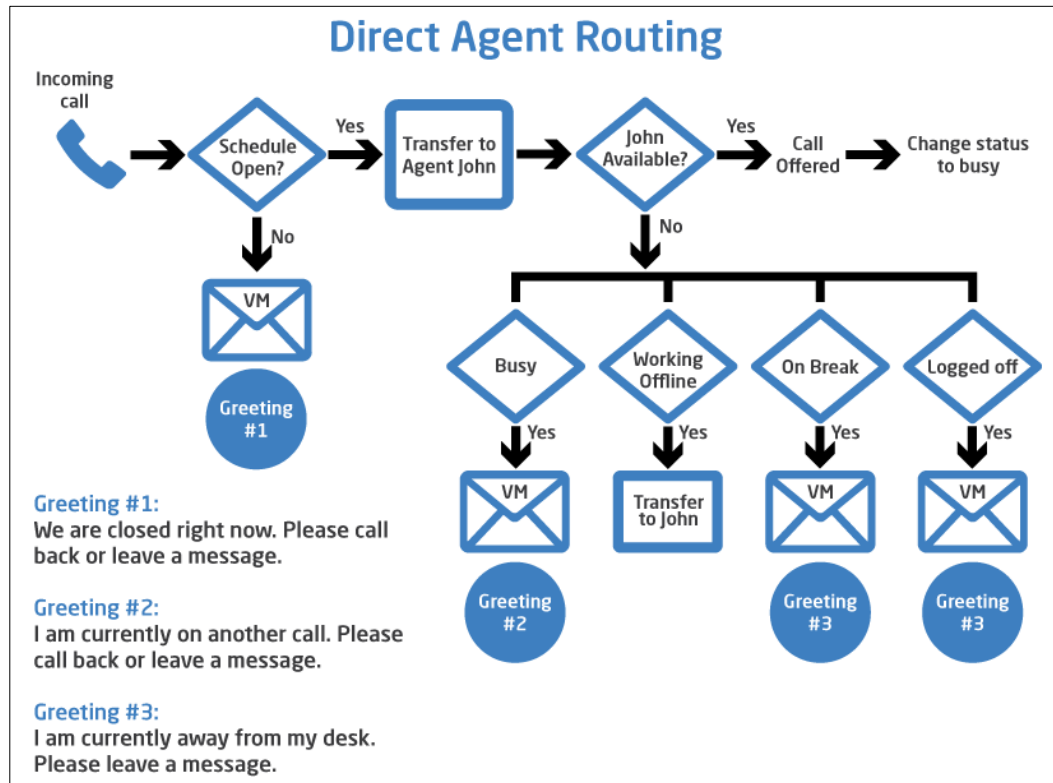
To meet these requirements, Bob, the IVR Script administrator at AcmeJets has to:

1. Develop an IVR script
2. Ensure each agent is assigned with direct channel
3. Assign each agent's phone channel to this script

Step 1: Develop an IVR Script

To craft an IVR script:

1. Navigate to **Scripts**.
2. Click **Phone** link or Plus icon to add a new script.
3. Add the following properties and click.

Scripts » Phone » Properties

DirectToAgent

◄ Back to script list

| Properties | Script |

		Assigned channels
Script type	Phone	
* Script name	DirectToAgent	✚ Assign new channel(s)
Category	Sales ▾	
Comment	This script directs calls directly to agents.	

☑ This script is enabled

4. Select **Script** tab to create an IVR script.
5. The new script must take effect during Support operational hours.
6. So select the **Schedule** object.
7. If the call comes in during open hours, then select **Transfer to Agent** object to direct the call to the agent.
8. Under **Transfer to Agent** object, specify if you want to transfer irrespective of agent's status.
9. By default, the call is transferred if agent is available.
10. Check the agent status to change to busy. This prevents a queued call being offered to the agent.
11. For the following exit points select a call treatment.
    o For Busy – Transfer to agent voicemail – play agentgreetingrecording-2

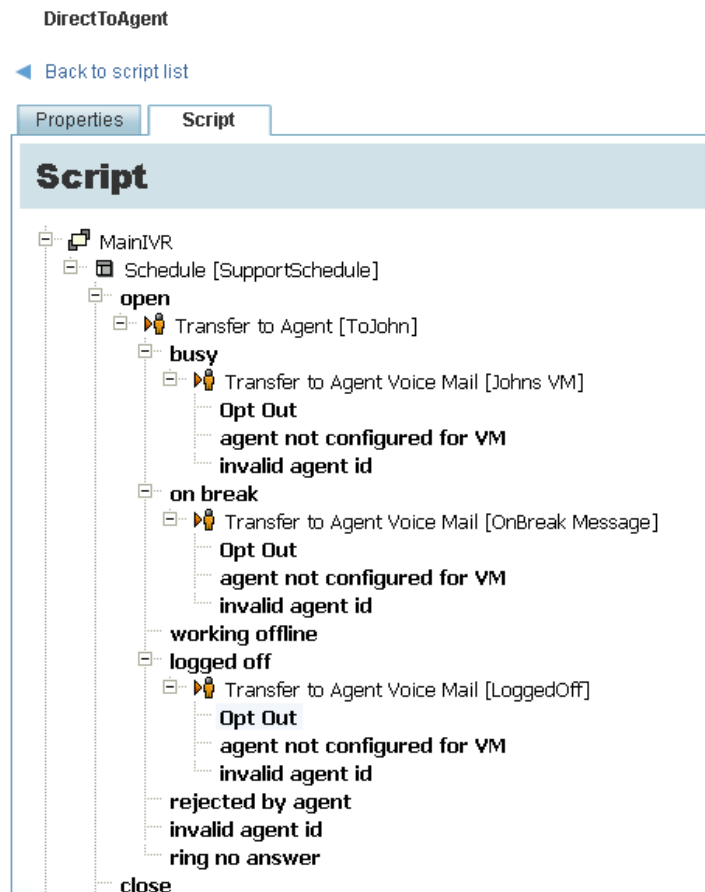   o   For Working Offline – Transfer the call even if the agent is in this state.
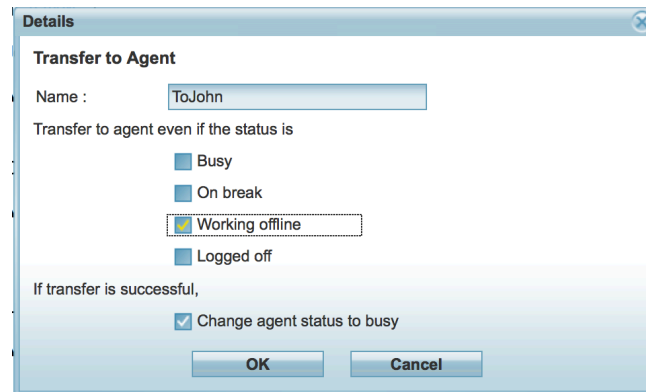
    o   For On Break – Send to voicemail – play agentgreetingrecord-3

    o   For Logged Off - Send to voicemail – play agentgreetingrecord-3

12. Click **Save**. If you navigate away from the page before saving the script, your script fails to save.

The completed script for Use Case 1 is shown below.

Step 2: Link a Channel to an Agent

Navigate to **Channels** and ensure each agent is assigned with a direct channel.

Channels » Phone » Properties

5252199

◀ Back to channel list

Properties

Channel type	Phone
Number	5252199
* Channel name	525-2199
Display phone format	US short [xxx-xxxx]
* IVR Script	Script from channel 525-2199
Linked Agent	John Smith - jsmith 🖉 ⊗
	☑ This channel is enabled

Step 3: Assign a Channel to a Script

To complete this process, Rob must now assign this script to all Support agents who are assigned with DIDs.

To assign a channel to a script:

1. Navigate to Scripts, select the script you just created.
2. Open the script for editing.
3. Click on **Assign New Channels** link in the **Properties** tab.
4. From the list of channels, select the channel assigned to John and click **Assign**.

Use Case - 2 Buddy Agent Routing

At AcmeJets, each top tier sales agent has a named buddy agent to attend calls in their absence. The buddy agent has equivalent skills and is responsible to manage calls from existing customers. For example, if John who is assigned to customer A is not available to take calls, then the call is transferred to Emily, who covers for John. If Emily is also not available then the customer should be directed back to John's voicemail allowing them to leave a message for John.

The following diagram represents the call flow.
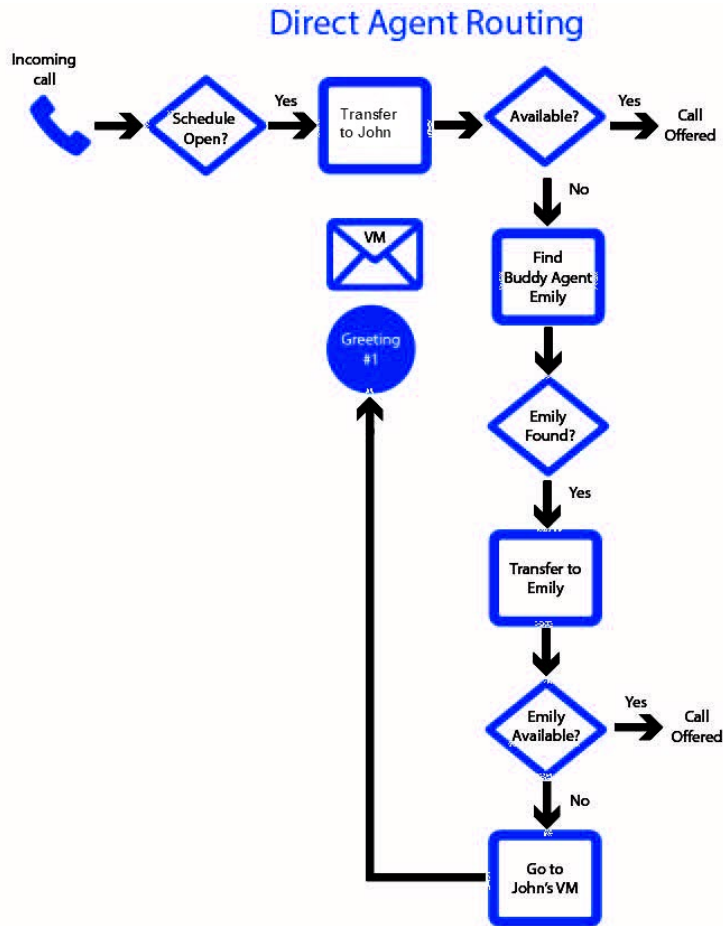
When a customer call enters IVR, the script will first check for business hours. If it is open, then the script executes as follows:

Call Flow	Script Object
1. Transfer the call to the agent (John) who is assigned to the phone channel.	Add **Transfer to Agent**
2. If Rob is busy, ask the caller to leave a message for the agent.	Busy →Add **Transfer to Agent Voicemail**
3. If Rob is on break or logged off, then find Emily who covers for John.	On Break or Logged Off →Add **Set Agent** (None | Fix Agent | Select Emily)
4. On finding Emily, transfer the call to her.	Agent found → **Transfer to Agent**

5. If Emily is not reachable, then find the agent linked to the phone channel that received the call, who in this case is John.	Busy →Add **Set Agent (Channel Linked to)**
6. Transfer the caller to John's voicemail box.	Add **Transfer to Agent Voicemail**

The completed script for Use Case 1 is shown below.
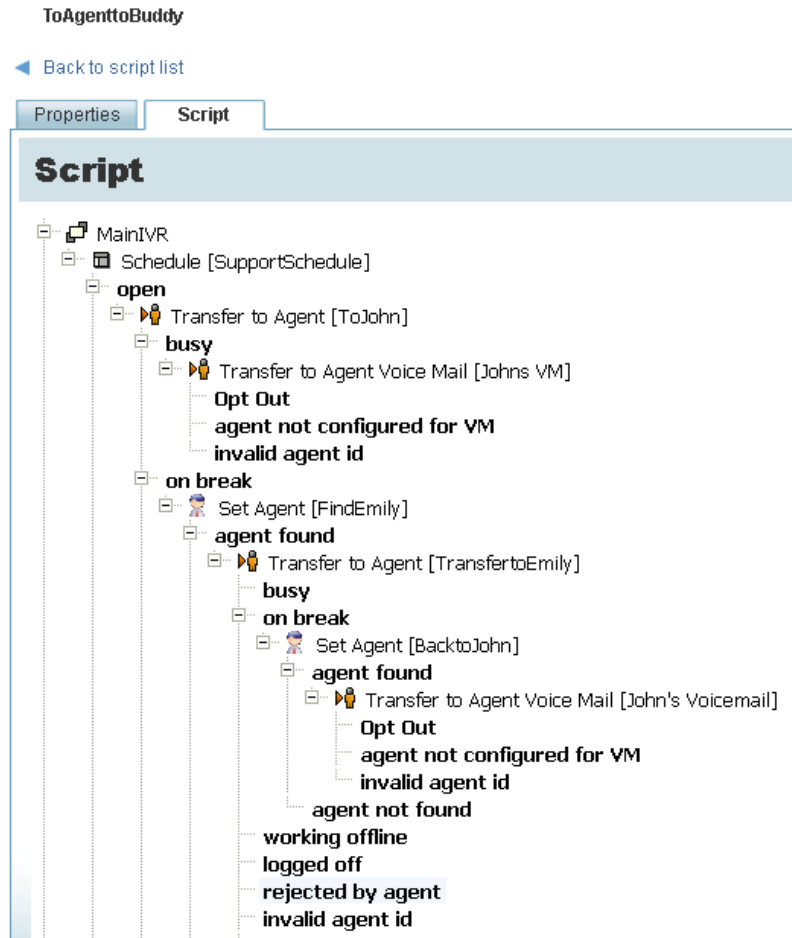
Use Case 3 - Last Agent Routing

At AcmeJets, the Support organization Chief wants to make sure calls from customers with existing cases should be directed to the right agent who handled it previously. If an existing customer calls, all they must do is to input the relevant case number at the prompt. They are transferred to the agent who is assigned to the case or who last worked on it. Last agent routing reduces enhances customer satisfaction, reduces time spent on knowing about the customer or the case. Agents get screen pop of customer detail record so they are better prepared to handle the call.

The following diagram represents the call flow for this use case.


When a customer call enters IVR, the script will first check for business hours. If it is open, then the script executes as follows:

Call Flow	Script Object
1. Check if the call entered during business hours.	Add **Schedule**
2. Ask the caller to input case number	Add **Get Value** (Case ID)
3. If case number matches an existing case, find the agent who is: a. Assigned to this case b. Created the case c. Last worked on the case	Add **Set Agent** (case assigned to)
4. If agent is found, then transfer the call to the agent.	Agent found → **Transfer to Agent**
5. If agent is busy, then transfer to agent's voicemail	Busy → **Transfer to Agent Voicemail**

The completed script is shown below.

LastAgentRouting

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| Properties | **Script** |

Script

```
MainIVR
  Schedule [SalesOpen]
    open
      Get Value [CaseLookup]
        contact found
          Set Agent [FindAgent]
            agent found
              Transfer to Agent [LastAgentRouting]
                busy
                on break
                  Transfer to Agent Voice Mail [ToVoiceMail]
                    Opt Out
                    agent not configured for VM
                    invalid agent id
                working offline
                logged off
                  Transfer to Agent Voice Mail [ToVoiceMail]
                    Opt Out
                    agent not configured for VM
                    invalid agent id
                rejected by agent
                invalid agent id
```

Migrating 8.0 DAA Scripts to 8.1

Enabling Direct Agent Access in 8.0 involved setting up the use of In 8.0 you could enable direct agent access in two ways:

- **Direct Agent Dialing**: Allow a caller to reach an agent using a dedicated DID
- **Extension Dialing**: Allow a caller to reach an agent using agent's extension number

End of Support for DAA

We plan to deprecate the **Forward to Agent** object used in 8.0. Hence we recommend you to migrate your DAA extension script to 8.1 environment as follows.

Direct Agent Dialing

To enable Direct Agent Dialing, you had to

1. Create a personal queue for each agent
2. Create an individual script for each channel, which contained a **Forward to Queue** object pointing to the specific queue the agent is a member of.

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◀ Back to channel list

Properties	**IVR Script**

- MainIVR
- Forward to Queue [To John]
  - **overload**
    - Forward to Voice Mail [To Voicemail]
- DefaultTermination [Hang Up]

A channel could not be linked to an agent, forcing the need for a personal queue. But in 8.1, we have eliminated the need for a personal queue as well as a separate script for each channel. You can accomplish this in a few simple steps:

1. Link a channel to an agent.
2. Develop a phone script, which enables direct agent dialing.
3. Assign this script to all channels dedicated to agents.

Refer to Use Case 1 for detailed instructions. In 8.1

Extension Dialing

To enable extension dialing in 8.0, you had to introduce **Forward to Agent** object for Extension node under **Menu** object. Your script in 8.0 looked something like this.
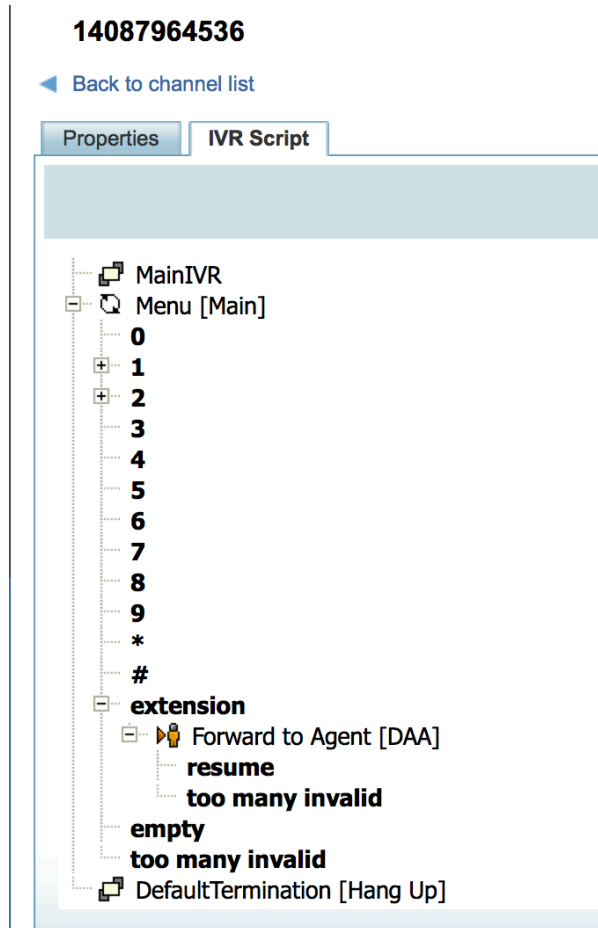
To set up direct agent access based on extension number:

1. Create a new script.
2. In the **Script** tab, develop the script as shown here.

Call Flow	Script Object
1. Check if the call entered during business hours.	Add **Schedule**
2. Ask the caller select a menu choice. If you know the party's extension, press 1.	Add **Menu** Select a node say 1

3. Ask the caller to input agent's extension number.	a. Add **Get Value** (Extension number) b. In **Data to collect**, select **agent:Extension**. c. Keep or change the max extension length.
4. If agent is found, then transfer the call to the agent.	Agent found → **Transfer to Agent**
5. If agent is busy, then transfer to agent's voicemail	Busy → **Transfer to Agent Voicemail**

The completed script for migration is as shown here.

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