

# Virtual Contact Center

## Release Notes

Version 8.1

Revision 2.0





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## Virtual Contact Center Release 8.1

The 8.1 Release Notes for Virtual Contact Center offer you the information required to get started with the new features and enhancements of the latest release. Please refer to the product documentation for additional details.

The 8.1 Release Notes provide:

- Detailed overview of new features
- Detailed overview of enhancements to existing features
- Instructions on how to set up and use the functionality

Let the Release Notes guide you through the transition to the new release of Virtual Contact Center.

### Summary of Features and Enhancements

The 8.1 release offers features and enhancements that impact all users of Virtual Contact Center including administrators, supervisors and agents. Some features are available to agents and supervisors by default, while others need to be enabled by administrators to benefit from the functionality. Some features are included in various 8x8 packages while others are optionally added.

Please contact your **Account Executive** at [vccsales@8x8.com](mailto:vccsales@8x8.com) with any questions on the product packaging or purchase options.

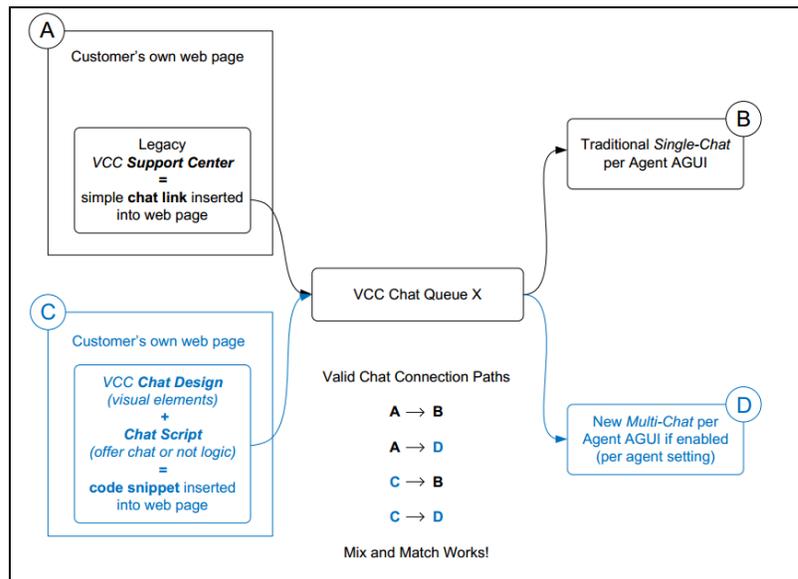
The following table lists the features and enhancements of the 8.1 release and their availability to users.

New Features/Enhancements	Requires Administrator set up	Feature available to Administrator	Feature impacts Agents	Feature impacts Supervisors
Multi Chat	✓		✓	✓
Embedded Chat	✓	✓		
Direct Agent Routing (DAR)	✓			
Script Decoupling	✓	✓		
NetSuite SSO Integration	✓		✓	

Salesforce SSO Integration	✓		✓	
Local CRM Enhancements			✓	✓

## Chat Overview

In the Agent Console, chat interactions provide a means of responding in real-time to customer inquiries. Depending on the configuration of your contact center, you can configure the chat access page to help identify the customers before beginning the chat session. You can either allow or require a customer to supply an account number, or other information, before beginning the chat interaction. Virtual Contact Center uses this information to look up our local CRM for a matching customer record. When you accept the new chat session, the Agent Console opens the matching customer record. If the customer has not supplied any identifying information before beginning the chat, you can use the chat window to ask the customer for the information you need to create a new customer or case record. Here is an overview of Virtual Contact Center chat today:



- **A** – In legacy implementation, chat channel was implemented using Support Center functionality. The Support Center contained a link to the chat channel, which in turn could be hosted on your webpage.
- **C** – In 8.1 implementation, you can host your contact center’s chat channel on your webpage independent of Support Center. You can design a proactive web chat interface according to your company’s requirements, build a chat script to define a logical workflow for your chat channel, and finally generate a code snippet to be placed in your website.

The chat interactions directed from A or C implementation will then flow through the specified Virtual Contact Center chat queue and then to the available contact center agents. Agents can process:

- **B** – A single chat at a time, the traditional way on the Agent Console.
- **D** – Multiple chats concurrently. Agents can process up to six customers chats concurrently if configured by the administrator.

For detailed information regarding Support Center and Single Chat, refer to Virtual Contact Center 8.0 documentation.

We discuss the following new features in 8.1 release:

- Embedded Chat Design
- Multi Chat
  - Customer-to-Agent Chat
  - Agent-to-Agent Chat



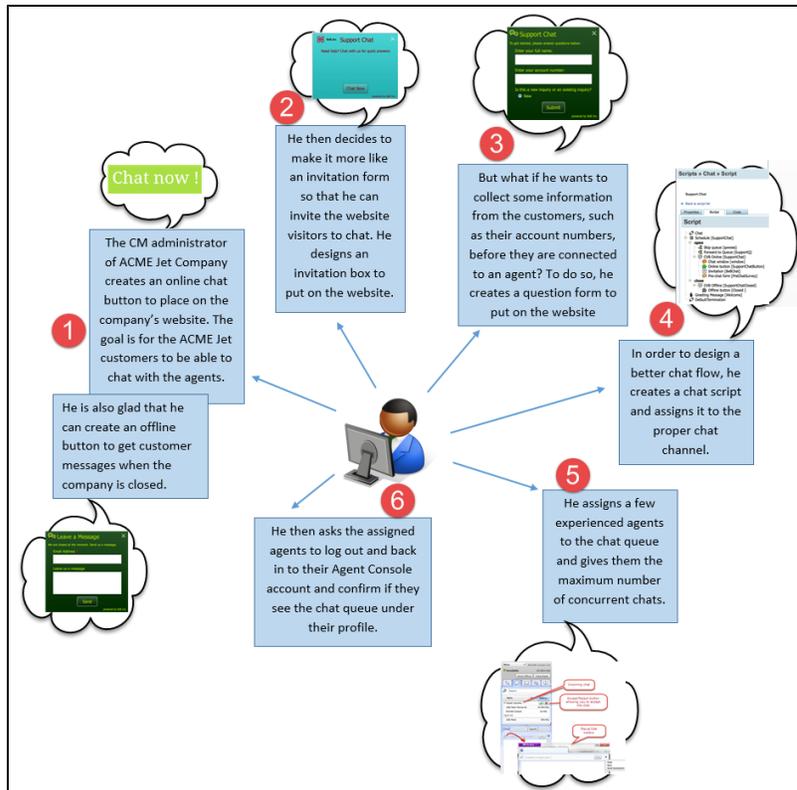
## Case Study

Bob is the Configuration Manager administrator at AcmeJets contact center. He wants to create an online chat channel to support website visitors. He anticipates the website traffic to be heavy during peak hours, therefore, the agents must be able to handle multiple chats to meet the demand. He plans to collect some identity information such as customer's name and account number to identify existing customers so agents can process interactions efficiently. This information can be collected from the customers even before they are connected to the agents allowing agents to serve them faster and better.

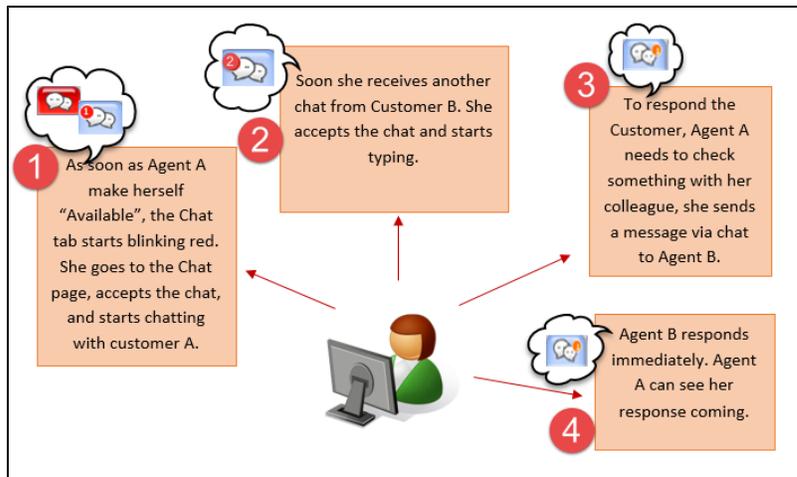
To complete this plan Bob needs to:

- Create a Chat Form to place on the company's website in order to invite the customers to chat.
- Create a chat script to define the chat workflow.
- Enable ACME Jet agents to process multiple chats with customers and other agents on the same tenant. He knows by default the agents can handle only one chat at a time.
- Train his agents how to use the multi chat.

The following diagram represents configuration tasks Bob must do to get started with this project:



Here is what Bob has in mind for the agents:



To plan his work better, Bob has prepared the following check list:

	Task	How to Do?	Completed
1	To create an online chat button to use during the business operational hours.	To create an online Chat Button	(optional)
2	To create an offline chat button to direct visitors during offline hours.	To create an online Chat Button	(optional)
3	To create a chat invitation to proactively invite website visitors to a chat.	Designing a Chat Invitation	(optional)
4	To create a chat form to gather information from a customer before initiating a chat.	Designing a Chat Form	✓
5	An Offline form to send an email message during chat offline hours	Designing a Chat Form	✓
6	A Chat Window to serve as the interface between the Chatee and the agent during the chat.	Designing a Chat Window	(optional)
7	To design the chat flow.	Enhanced Chat Script	✓
8	To enable to agents to have more than one chats.	Configuring Multi Chat, See Configuration Manager Guide for details.	✓
9	To train his agents how to use multi chat.	Handling Multiple Chats	✓

## Embedded Chat Design

The chat functionality in Virtual Contact Center is now enhanced with better chat workflow and design. With the new chat design, you can design a custom chat to match your corporate requirements and create a custom chat script to control the chat flow.

### Features

- Brand new Scripting Engine
- Proactive pop out chat invitation message
- Customized pre-chat survey form to collect customer information
- Improved routing of chats with customer gathered information

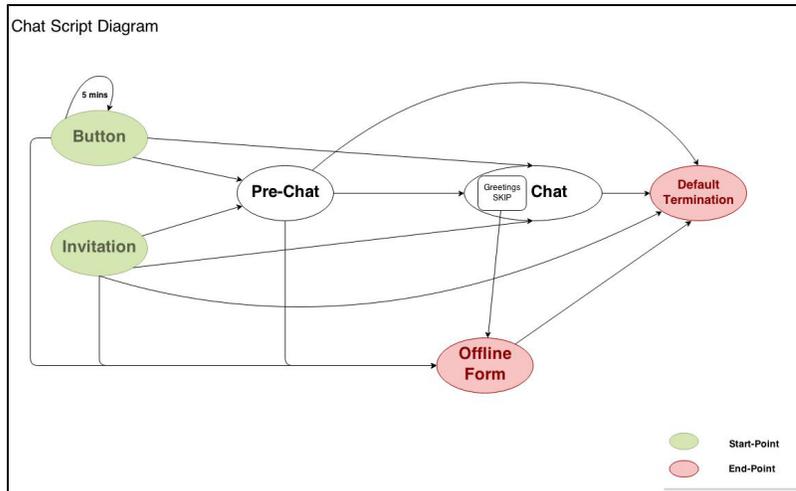
### Configuring Embedded Chat Design

The chat functionality in Virtual Contact Center is now enhanced with better chat workflow and design. With the new chat design, you can design a custom chat to match your corporate requirements and create a custom chat script to control the chat flow.

A chat workflow can be represented as follows:

1. A customer visits a website.
  2. A chat invitation pops proactively inviting the visitor to chat.
- OR
- The visitor clicks a chat button on the website to initiate a chat.
3. The visitor is then presented with a pre-chat survey form to collect some preliminary information.
  4. The visitor fills and submits the information. Based on the information submitted, the system checks if it is an existing customer.
  5. An agent accepts the chat interaction and begins a live chat session.
  6. When the chat channel is offline, the visitor is presented with an option to send an email message using an offline form.
  7. If the visitor drops out of a chat process, then the chat interaction enters a default termination.

The following figure shows the chat script diagram:



8x8 Embedded Chat offers chat visual block elements used on your website for a chat interaction:

- **Button:** is the chat button that initiates a chat interaction.
- **Invitation:** is the chat invitation that pops proactively inviting website visitors for a chat.
- **Form:** is the pre-chat survey form that gathers customer information.
- **Window:** is the chat window used by the end-user to chat with an agent.

### Important

The chat design offers default styles for these chat elements. You can change labels, select colors and company logo as desired. To further customize the chat elements to fit your corporate style, you can point to a custom CSS stylesheet in the [embedded chat code snippet](#).



```

<script type="text/javascript">
  var _8x8Chat = {
    // Other chat parameters (uuid, tenant, channel, domain...)
    stylesheetURL: "https://path.to/external-stylesheet.css"
  };
</script>

```

For more details, refer to [Embedded Chat API documentation](#).

Configuring Embedded Chat Design involves:

- [Designing a chat button](#)
- [Designing a pro-active chat invitation](#)
- [Designing a pre-chat survey form](#)
- [Designing a chat window](#)

## Designing a Chat Button

A chat button is an interface for a customer to initiate a chat. You can design a chat button to be offline or online. Online chat button can be used during the business operational hours for chat, while offline button can be used to direct visitors during offline hours. Chat Design offers a default offline and online chat buttons for use. To customize a chat button, you can create a new button from scratch, or copy a default button and make desired changes.

### To create an online chat button:

1. Log in to Configuration Manager.
2. Navigate to **Chat Design**.
3. In the **Button** tab, click  or **Online** link.
4. Enter Name and Description for the new chat button.
5. Browse and upload an image for the button.



**Note:** The file size must not exceed 1 mb.

**Chat design » Edit online button**

[← Back to button list](#)

\* Name  \* Description

**Button layout**



No files selected.

The file must be an image and can not exceed 1MB.

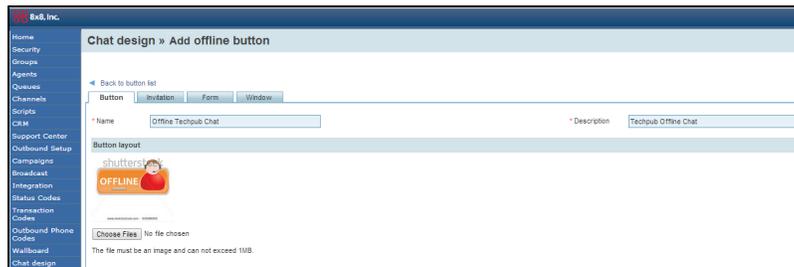
6. Click **Save** to create a new chat button.

### To create an offline chat button:

1. Log in to Configuration Manager.
2. Navigate to **Chat Design**.
3. Click  or **Offline** link.
4. Enter **Name** and **Description** for the new offline chat button.
5. Browse and upload an image for the button.



**Note:** The file size must not exceed 1 mb.



6. Click **Save** to create a new chat offline button.

## Designing a Chat Invitation

A chat invitation serves to proactively invite website visitors to a chat. You can program the chat invitation to present to the visitors after they have spent some time on the website. 8x8 Chat Design offers a default chat invitation for use. To create a custom chat invitation, you can build a new invitation from scratch or copy a default invitation and make desired changes.

### To create a custom chat invitation:

1. Log in to Configuration Manager.
2. Navigate to **Chat Design**.
3. Select **Invitation** tab.

4. Click  or **Add New Invitation** link.

5. Enter **Name** and **Description** for the new chat invitation.
6. Add or change the user interface elements of the invitation by selecting the desired details.

7. When you are satisfied with look and feel of the invitation form, click **Save**.

## Designing a Chat Form

A chat form can be of two types: Pre-Chat Survey form and Offline form.

- A Pre-Chat Survey form serves to gather information from a customer before initiating a chat. Using the form, you can collect credentials such as account number or case number from an existing user.

This information can be used to search for existing customer records in the Local CRM and present it when an agent accepts the chat.

- An Offline form presents an option to send an email message during chat offline hours.

You can use the default form or create a custom form. To create a custom form, you can copy the default form and make desired changes or create a new form from scratch.

## Pre-Chat Survey Form

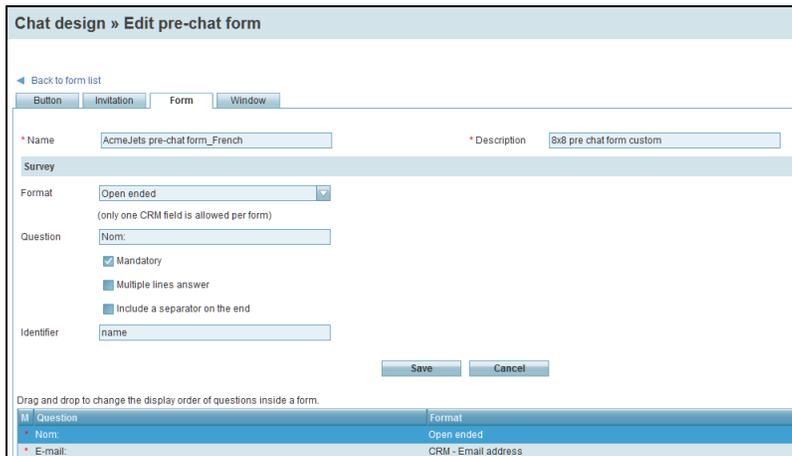
A Pre-Chat survey form can include questions with open-ended answers or pre-set answers. Designing a pre-chat form is a two-step process.

- Add survey questions
- Design the visual details of the form

### To create a custom pre-chat form:

1. Log in to Configuration Manager.
2. Navigate to **Chat Design**.
3. Select **Form** tab.

4. Click  or **Pre-Chat** link.



Chat design » Edit pre-chat form

Back to form list

Button Invitation Form Window

\* Name AcmeJets pre-chat form\_French \* Description 8x8 pre chat form custom

Survey

Format Open ended (only one CRM field is allowed per form)

Question Nom:  Mandatory  Multiple lines answer  Include a separator on the end

Identifier name

Save Cancel

Drag and drop to change the display order of questions inside a form.

Question	Format
Nom	Open ended
E-mail	CRM - Email address

5. Enter **Name** and **Description** of the new form.
6. Select a **Format** from the following choices:
  - **Translation**: Indicates a language choice question. This offers a set of languages supported for chat translation. Select the desired languages for the customer to choose from.
  - **CRM field**: Select from the available default or custom local CRM fields.



**Note:** You are allowed to add only one CRM field and one translation question in a pre-chat survey form. Once you add the questions, the option is disabled in the Formats list. You can change or edit the questions at any time.

- **Open ended:** Add an open-ended question such as [Enter your nickname].
  - **Single answer:** This is a multiple choice question. You must provide choices and allow the chat enthusiast to select a single answer.
7. Enter the question.
  8. Select if the question is mandatory.
  9. Add an Identifier to connect this question to its parallels in pre-chat forms in other languages.
  10. Click **Add**.
  11. Repeat steps 6 to 10 to add more questions.

Chat design » Add pre-chat form

Back to form list

Button Invitation Form Window

Name: Support Chat Form Description: This is a pre-chat survey for Support inquiries Step 1 > Step 2

Survey

Format: CRM field CRM field: Account number

Question: Enter your account number

Mandatory

Include a separator on the end

Save Cancel

Drag and drop to change the display order of questions inside a form.

Question	Format	
Enter your full name	Open ended	
Enter your account number	CRM - Account number	
Is this a new inquiry or an existing inquiry?	Single answer	

Cancel Next >>

12. After adding all questions, click **Next** to define the visual details of the form.

Chat design » Add pre-chat form

Back to form list

Button Invitation Form Window

Color Preview Step 1 > Step 2

Window title: Support Chat

Button label: Submit

Introduction text: To get started, please answer questions below:

Window background: #003300 Text: #99CC00

Border: #DDDDDD

Logo customization: Browse... No files selected.

The file must be an image and can not exceed 1MB.  
The image will be resized for the proportion of 100x30 pixels.

Preview

Support Chat

To get started, please answer questions below:

Enter your full name:

Enter your account number:

Is this a new inquiry or an existing inquiry?

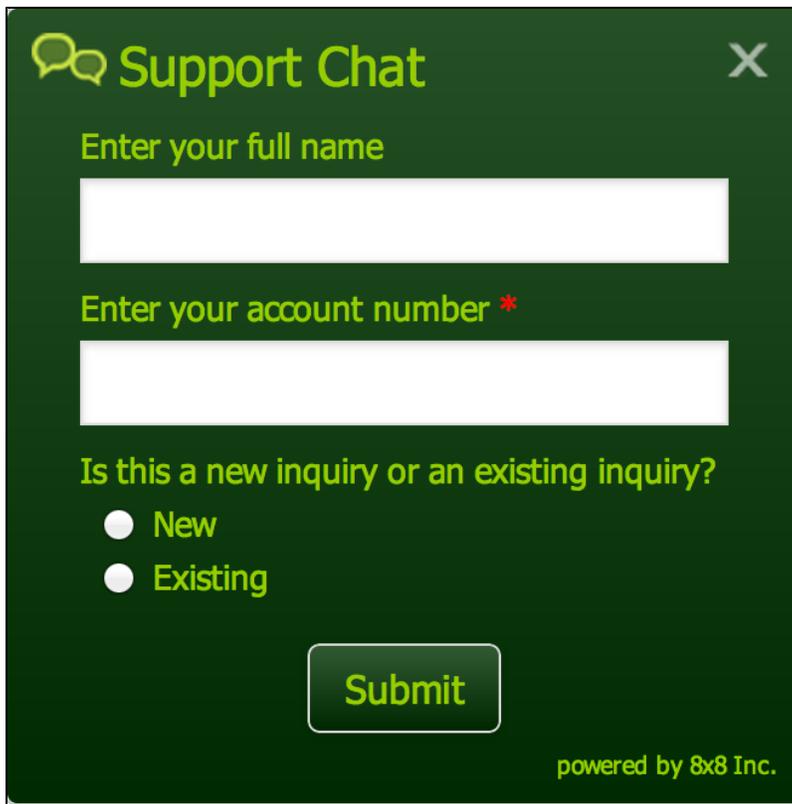
New

Submit

powered by bell inc.

Cancel << Previous Save

13. Add the desired visual requirements such as window title, background color, font color.

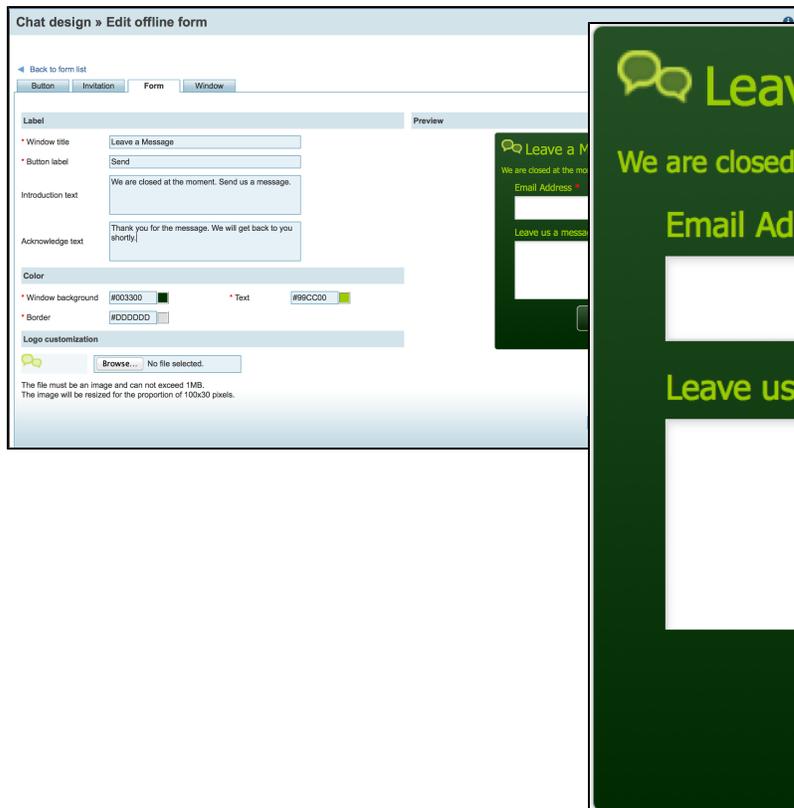


The image shows a custom pre-chat form with a dark green background and light green text. The form is titled "Support Chat" in the top left corner, with a close button (X) in the top right. The form contains two text input fields: "Enter your full name" and "Enter your account number \*". Below these fields is a radio button selection for "Is this a new inquiry or an existing inquiry?" with options "New" and "Existing". A "Submit" button is located at the bottom center, and the text "powered by 8x8 Inc." is in the bottom right corner.

14. Click **Save**. Your custom pre-chat form is now ready.

## Offline Form

The Offline Form is meant to interface with visitors who wish to send a message when the chat channel is offline. To create a custom Offline form, add desirable questions on the form and design the visual interface of the form.



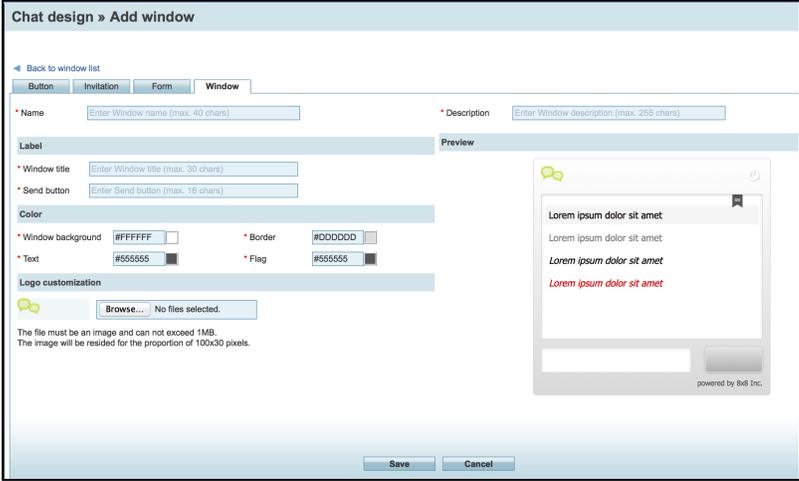
## Designing a Chat Window

The Chat Window is the interface between the customer and the agent during the chat. You can use the default chat window or create a custom window. To create a custom window, you can copy the default form and make desired changes or create a new form from scratch.

### To create a custom chat window:

1. Log in to Configuration Manager.
2. From Chat Design, select **Window** tab.

3. Click  or **Add New Window** link.



**Chat design » Add window**

Back to window list

Button Invitation Form **Window**

\* Name  \* Description

Label  Preview

\* Window title

\* Send button

Color

\* Window background  \* Border

\* Text  \* Flag

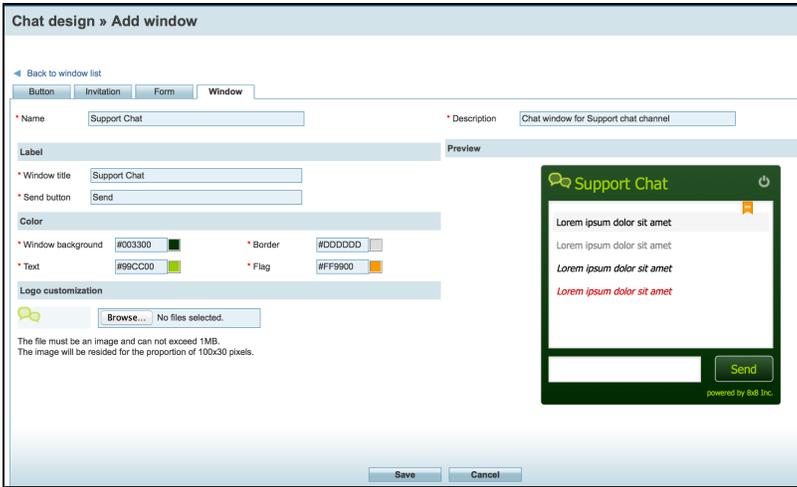
Logo customization

  No files selected.

The file must be an image and can not exceed 1MB.  
The image will be resized for the proportion of 100x30 pixels.

powered by 8&8 Inc.

4. Enter Name and Description of the new form.
5. Change the visual elements of the chat window as desired.



**Chat design » Add window**

Back to window list

Button Invitation Form **Window**

\* Name  \* Description

Label  Preview

\* Window title

\* Send button

Color

\* Window background  \* Border

\* Text  \* Flag

Logo customization

  No files selected.

The file must be an image and can not exceed 1MB.  
The image will be resized for the proportion of 100x30 pixels.

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6. Click **Save**.

With this, you have defined all the Chat Visual Block (CVB) elements. The next step is to add them in a chat script to complete the workflow.

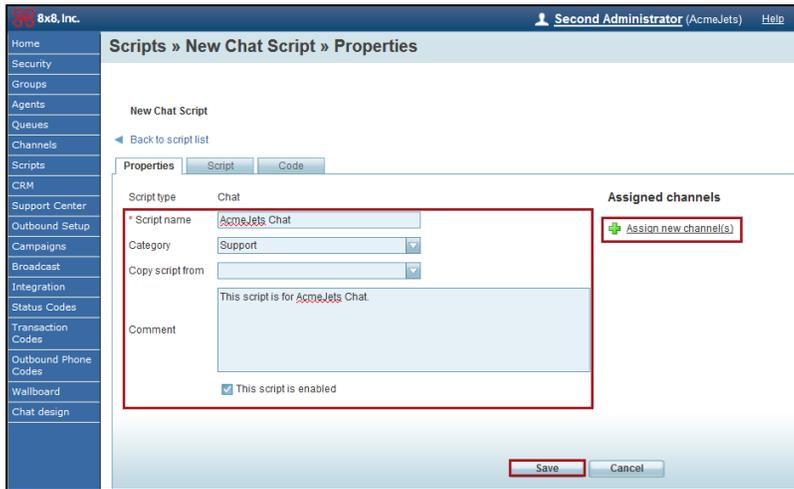
## Enhanced Chat Script

The enhanced chat-scripting engine now allows you to design and control the chat flow in a contact center. You can associate a chat script with one or more chat channels. To see the chat workflow diagram, refer to [Configuring Embedded Chat Design](#).

### To design a chat script:

1. Log in to Configuration Manager.
2. Navigate to **Scripts** in the navigation menu.

3. Click  or **Chat** link.



The screenshot shows the 'Scripts » New Chat Script » Properties' page in the 8x8 Configuration Manager. The left sidebar contains navigation links like Home, Security, Groups, Agents, Queues, Channels, Scripts, CRM, Support Center, Outbound Setup, Campaigns, Broadcast, Integration, Status Codes, Transaction Codes, Outbound Phone Codes, Wallboard, and Chat design. The main content area has tabs for 'Properties', 'Script', and 'Code'. The 'Properties' tab is active, showing a form for a 'New Chat Script'. The form includes a 'Script type' dropdown set to 'Chat', a 'Script name' field with 'AcmeJets Chat', a 'Category' dropdown set to 'Support', a 'Copy script from' dropdown, and a 'Comment' text area containing 'This script is for AcmeJets Chat.' There is a checkbox labeled 'This script is enabled' which is checked. To the right, there is an 'Assigned channels' section with a green plus icon and the text 'Assign new channel(s)'. At the bottom of the form, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

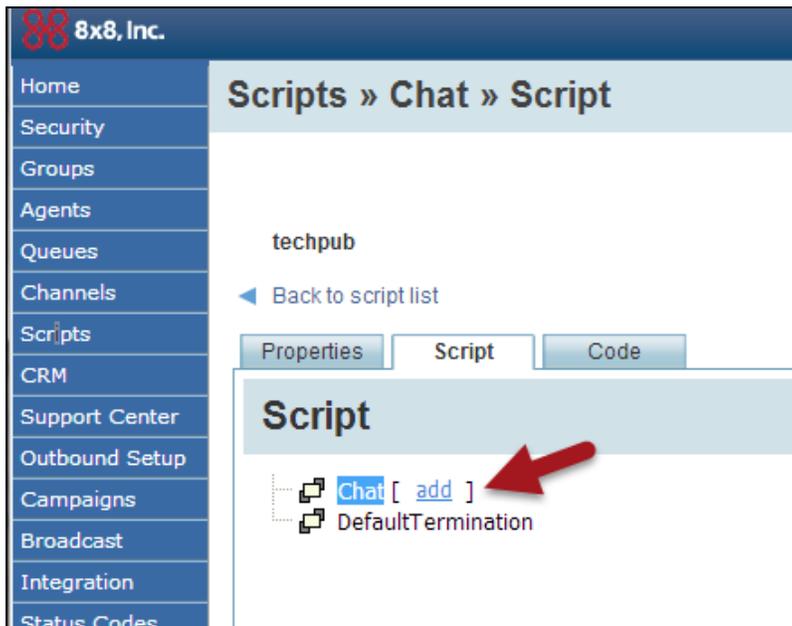
4. In the **Properties** tab, enter a **Script name**.
5. Select a **Category** from the list. To create a new category, click **Edit Categories**.
6. Choose **Copy script from** if you wish to use an existing script.
7. Enter **Comments** .
8. Select **This script is enabled** if you wish to enable the script.

9. Click  **Assign new channels** to assign the new script to an existing channel.

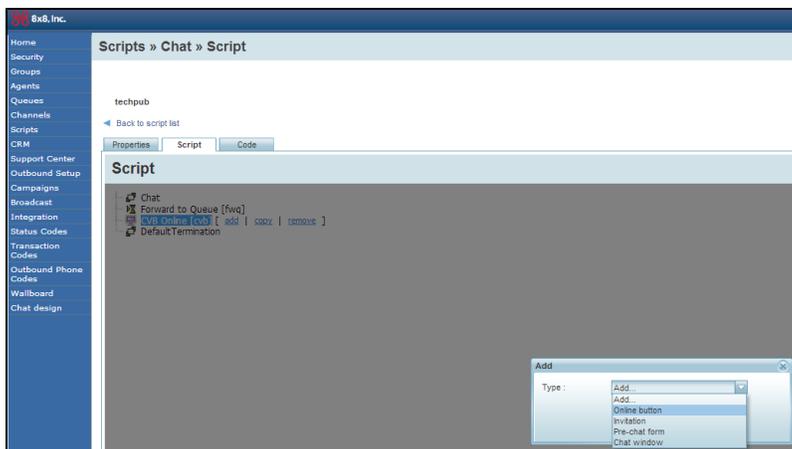


**Note:** If you select a channel and click **Assign** the channel's previous script will be permanently replaced by the new script. You can assign one script to multiple channels. But each channel can have only one script.

10. Click **Save**.
11. In the **Script** tab, click **Chat**. The **[ add ]** hyperlink appears.

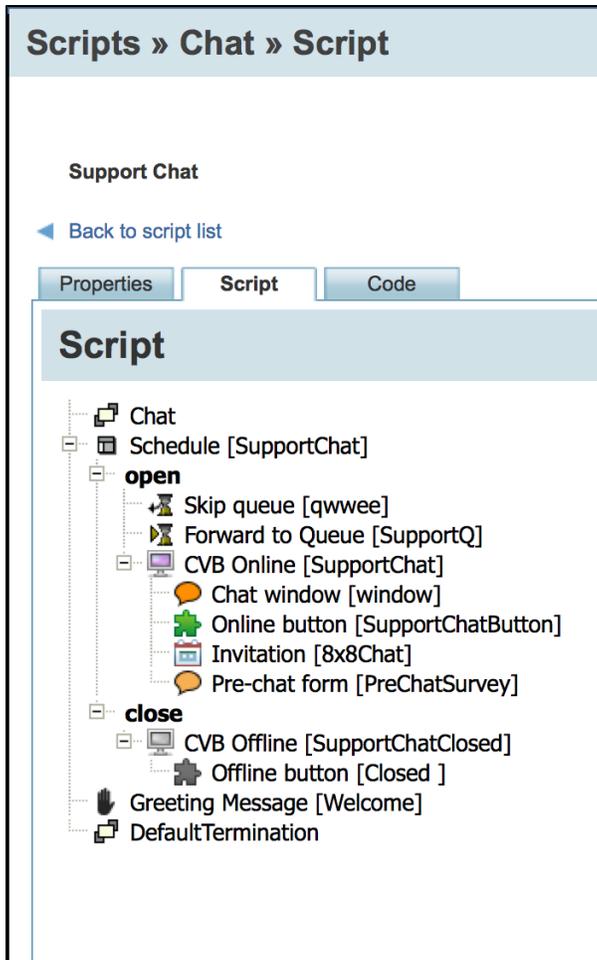


12. Click **[ add ]** next to Chat.
13. Choose **CVB Online** and enter a name.
14. Click **[ add ]** again.
15. Choose **Forward to Queue** and enter a name.
16. Select a queue name from the **Add** window and click **OK**. **Forward to Queue** appears in the next line.



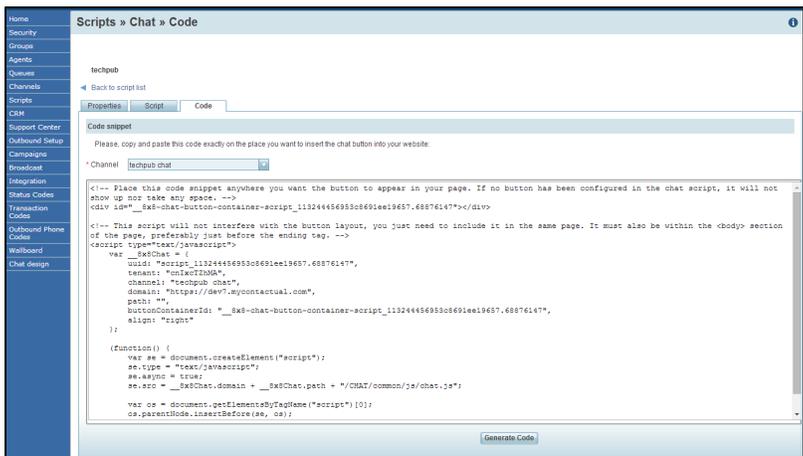
17. Click [ **add** ] next to CVB online.
18. Choose **Online button** from the list and enter a name.
19. Select a window such as 8x8 online custom and click **OK**.
20. Click [ **add** ] next to **CVB online**.
21. Select **Chat** window from the list and enter a name
22. Click **Save**.

The following image shows an example of chat script:



**Note:** As long as you have all the objects in the code, the chat elements are automatically placed in the right order.

- 23. In the **Code** tab, select the **chat channel** from the list.
- 24. Click **Generate Code**. The code appears in the window.



- 25. Copy and paste the code to a page where you want to insert a chat button on your website.

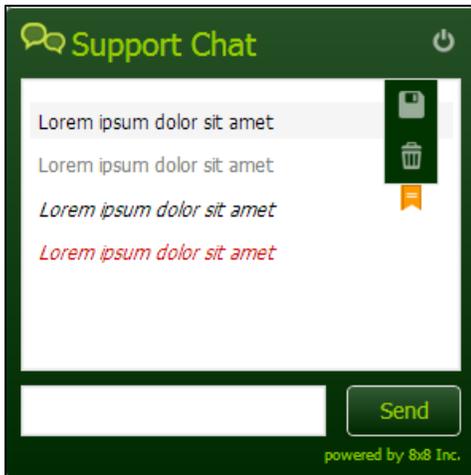
 **Note:** This script does not interfere with the button layout. It must be included in the same page and within the body section of the web page, preferably just before the ending tag.

**Note:** If you wish to customize the chat elements such as use corporate fonts, you can point to a custom CSS stylesheet in the code snippet.

```
<script type="text/javascript">
  var __8x8Chat = {
    // Other chat parameters (uuid, tenant, channel, domain...)
    stylesheetURL: "https://path.to/external-stylesheet.css"
  }
</script>
```

For more details, refer to [Embedded Chat API documentation](#).

26. Click the Chat button you just created. The **Chat** window opens.

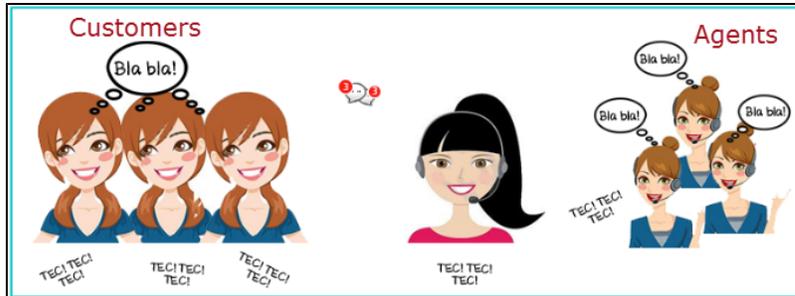


The following table summarizes the objects available for a chat script.

Chat Script Object	Description
Schedule	Use the object to check if the chat request came in when the business is open, closed, or exception hours.
Skip Queue	Use this object to give the customer the option to send an email instead of waiting for the chat.
Forward to Queue	Forwards the chats to a chat queue such as Sales or main queue.
CVB Online	Chat Visual Block Online refers to a chat design element such as a chat button or chat form which can be used on your website during business hours.
CVB Offline	Chat Visual Block Offline refers to a chat design element such as a chat button or chat form that activates on your website during closed hours.
CVB Default	Chat Visual Block Default refers to a chat design element such as a chat button or chat form available by default from Virtual Contact Center.
Greeting Message	Use this object to type a greeting message to invite the chat enthusiasts to the chat session.
Test Queue	Use the Test Queue object to check the condition of a queue before entering a queue.

## Multi-Chat

Agents can handle multiple chats at the same time. The Configuration Manager administrator can configure each agent to handle up to six chats with customers, and an unlimited number of chats with other agents of the same tenant.



## Features

- Virtual Contact Center manages concurrent chats with multiple customers and agents.
- The customers and agents chat list provides easy access to chats in progress.
- The chat list is sorted primarily based on waiting time; the longest waiting chat is placed on top of the list.
- Icons differentiate agent-to-customer chat from agent-to-agent chats.
- Icons highlight unread chat messages.
- Icons indicate customers waiting for agent's response.
- Icons send alert if customers are waiting longer than targeted Service Level Agreement (SLA).
- A pop-out chat window improves handling multiple chats.
- Relevant customer records pops up when accepting chats.
- Customer information such as Name, Email, and Transaction ID display on the title bar of the popped out chat window.
- The chat list can be sorted by identification such as Nickname, First Name, Last Name, Email, and Transaction ID. By default, the chat list is sorted by waiting time.
- Tracks messages from new customers using Transaction ID .
- Searches chat list by name.

## Handling Multiple Chats

Agents can handle multiple concurrent chats with customers and agents. Agents must be in *Available* state to accept the first chat. After accepting the first chat, agent's status changes to *Busy*. Based on the

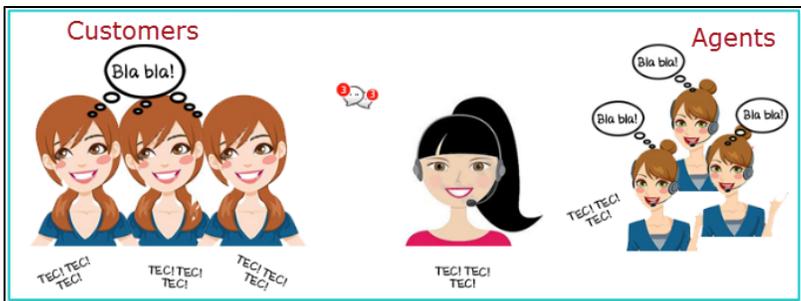
number of interactions allowed for the agent, chat requests continues to be offered to the agent until he reaches the maximum allowed customer chats. When a new chat request is offered, the chat tab indicates an incoming request by blinking if the Chat tab is not in focus.

At the same time, the customer receives a message to wait until an agent becomes available. You can accept or reject the chat at this time. On accepting a chat, the system looks to see if that is of an existing customer. If a matching CRM record is found, the customer detail record is presented to the agent in a separate tab. In the absence of a matching record, a new customer record opens.

The agent can now chat with the customer and be open for handling more chat requests.

Multiple chats can be:

- Customer-to-Agent Chat
- Agent-to-Agent Chat



## Chat List

To keep track of multiple chats in progress, a chat list is maintained for customer chats and agent chats. When a new chat is offered to an agent, the Chat List is updated to show this new entry at the top of the

appropriate Group. A Question Mark  appears in the new message column next to the customer name.

**Accept**  and **Reject**  icons appear in the same row:

Menu John Smith

**Customer Chat Offered** 0m:19s

Accept Chat    Reject Chat

Search...

Identification    Waiting ▾

**Customer List**

? Wahl, Kari		
Brown, Chris	5m:33s	

Transaction    Agents    Queues

Transaction Information

<b>Customer:</b>	Wahl, Kari
<b>Company:</b>	N/A
<b>Subject:</b>	Your Property Search from Michael Swift
<b>Channel:</b>	Acme_Support
<b>Queue:</b>	Support Chat
<b>Wait Time:</b>	0m:00s
<b>Transaction ID:</b>	54
<b>Case number:</b>	175

Powered by 8x8, Inc.

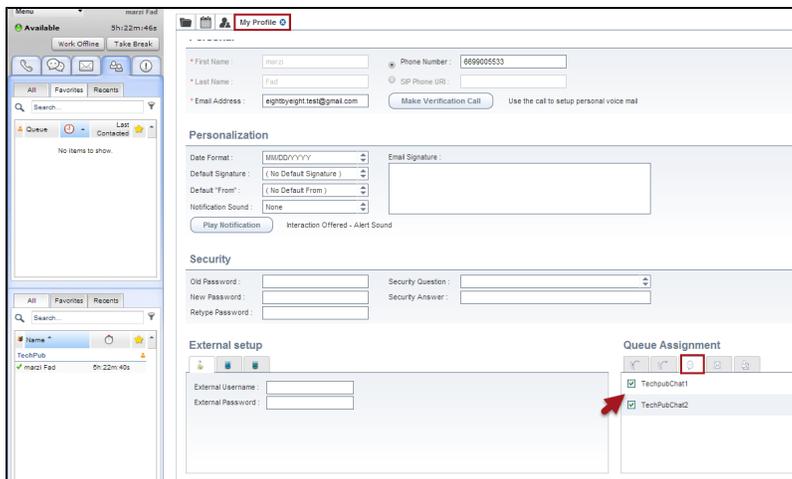
The chat session starts as soon as you accept the chat. A customer chat is displayed in the **Customer List** while an agent chat is displayed in the **Agent List**. If the agent selects a chat, the chat information is shown in the chat panel with the **Transaction** tab selected. If the agent accepts the chat, the chat continues as expected.

## Customer-to-Agent Chat

As an agent you can chat with up to six customers. When a customer chat arrives in the queue, it is offered to the available agent who has been waiting for the longest time.

### Before you start:

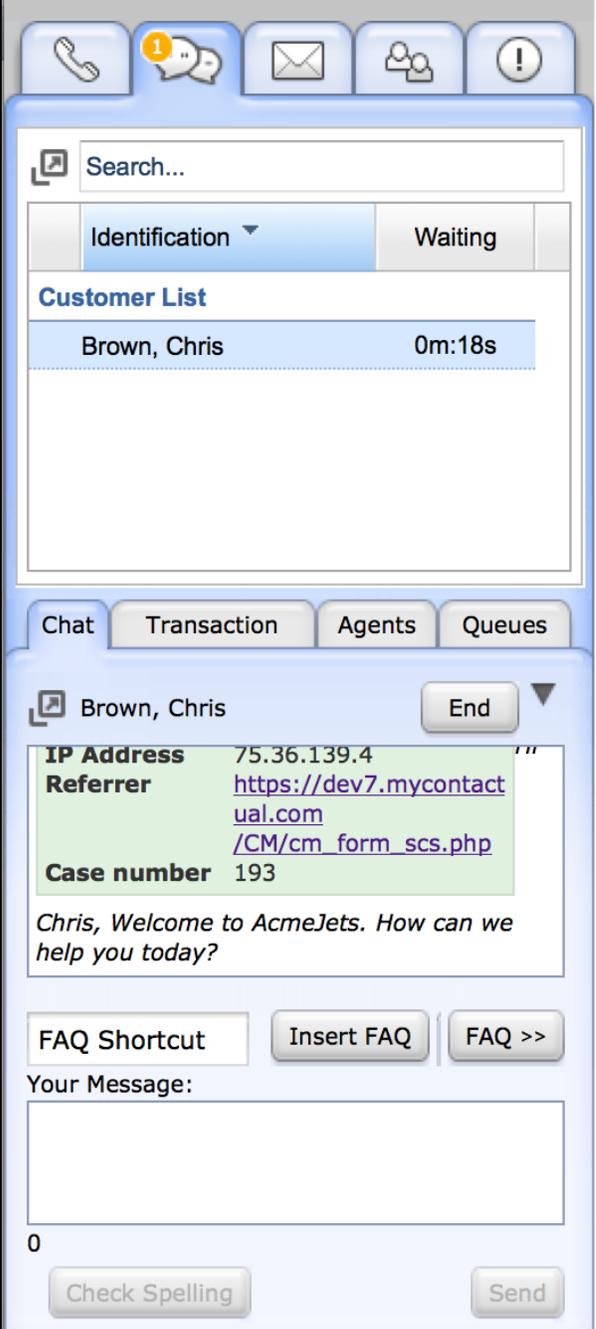
1. Log in to the Agent Console.
2. Click **Available**.
3. Go to **Profile** in the main menu.
4. In **Queue Assignment** go to **Chat** tab and check if you are assigned to the right chat queue.



### To process a customer chat:

1. In Agent Console, when a new chat is offered, click  to go to the chat window.
2. Click  to accept the chat. The tab changes to  indicating the number of active chats waiting.
3. The **chat list** gets updated with the customer information for an existing customer.  
The customer's detailed record also opens in a new tab.
4. Type your message in the chat window and click **Send**.

**Note:** Click  to open a chat window. The title bar in the popout chat window shows customer nickname, last name, first name, email ID. If it is a new customer, it shows Transaction ID.



The screenshot displays a chat application interface. At the top, there is a toolbar with icons for phone, chat (with a notification badge), email, agents, and a warning sign. Below the toolbar is a search bar labeled "Search...". A navigation bar contains "Identification" (with a dropdown arrow) and "Waiting". A "Customer List" table is shown with one entry: "Brown, Chris" with a duration of "0m:18s". Below the list are tabs for "Chat", "Transaction", "Agents", and "Queues". The active chat window is titled "Brown, Chris" and includes an "End" button. The chat content area shows technical details: "IP Address 75.36.139.4", "Referrer https://dev7.mycontact.ual.com/CM/cm\_form\_scs.php", and "Case number 193". Below this is a welcome message: "Chris, Welcome to AcmeJets. How can we help you today?". There are three buttons: "FAQ Shortcut", "Insert FAQ", and "FAQ >>". A text input field labeled "Your Message:" is present, with a "0" character below it. At the bottom are "Check Spelling" and "Send" buttons.

Customer List	
Brown, Chris	0m:18s

**Chat Window: Brown, Chris**

**IP Address** 75.36.139.4  
**Referrer** [https://dev7.mycontact.ual.com/CM/cm\\_form\\_scs.php](https://dev7.mycontact.ual.com/CM/cm_form_scs.php)  
**Case number** 193

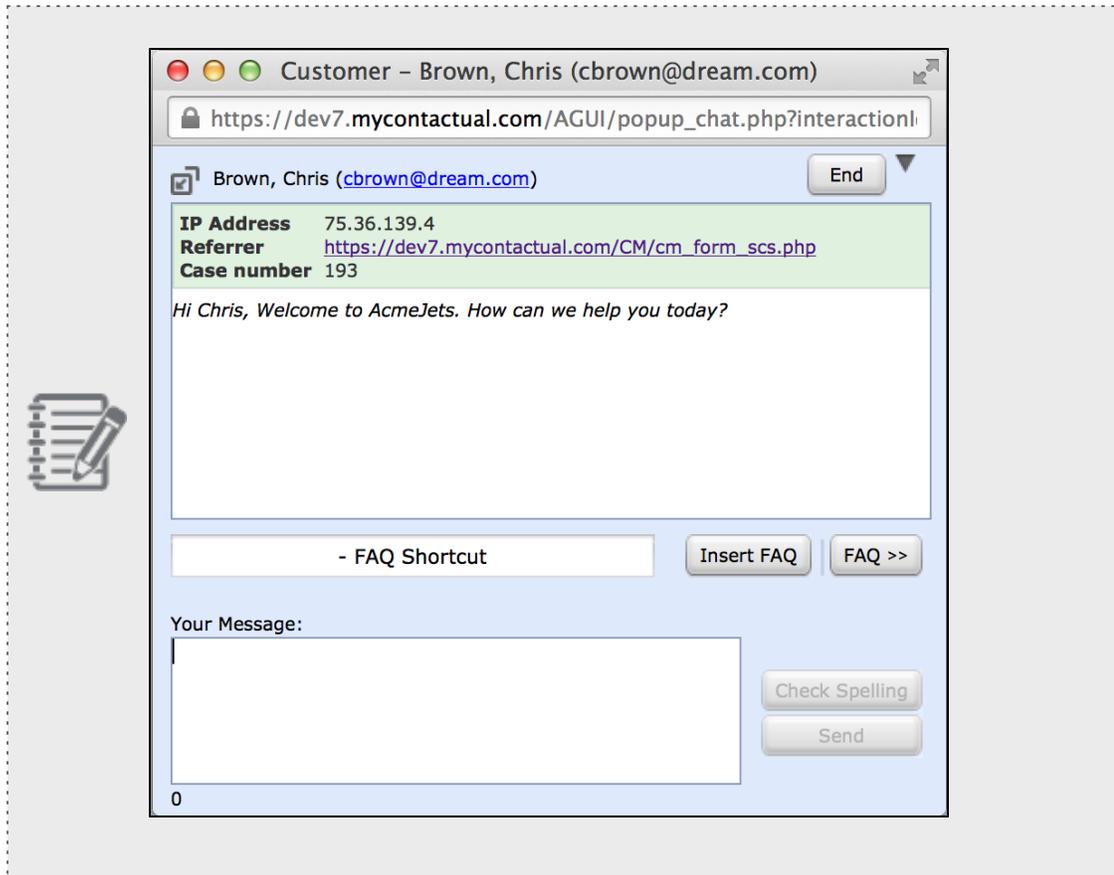
*Chris, Welcome to AcmeJets. How can we help you today?*

FAQ Shortcut    Insert FAQ    FAQ >>

Your Message:  
0

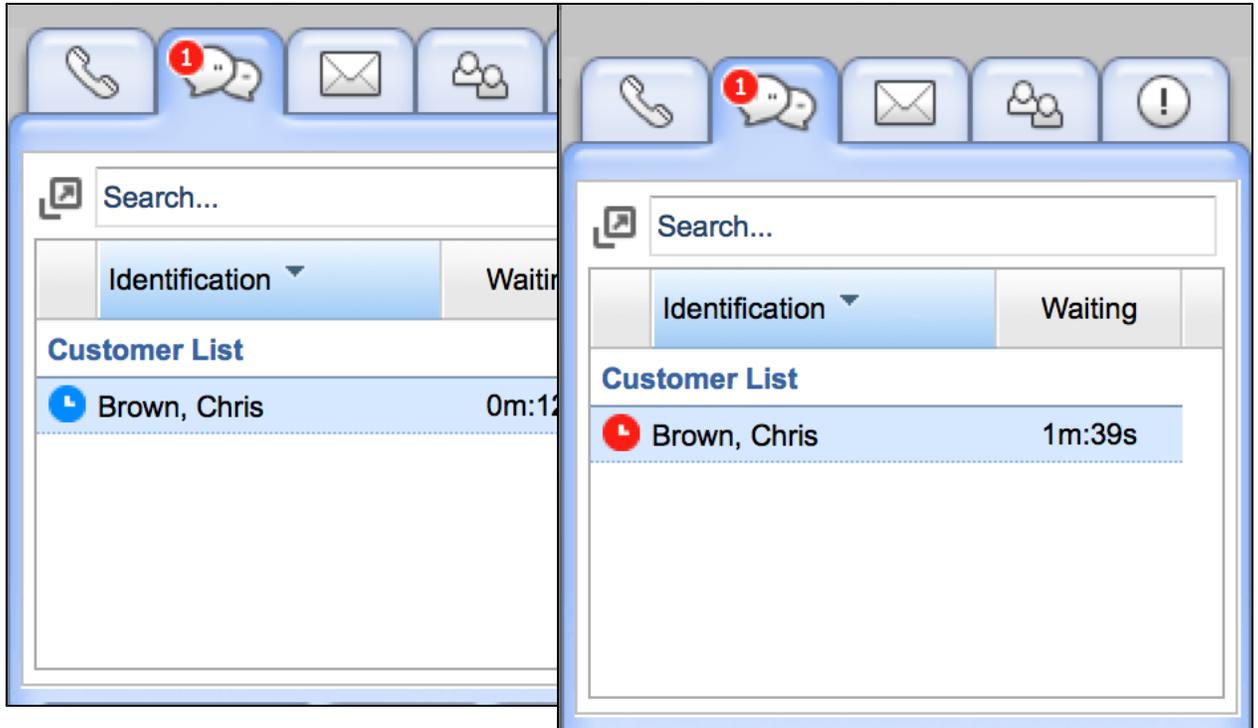
Check Spelling    Send



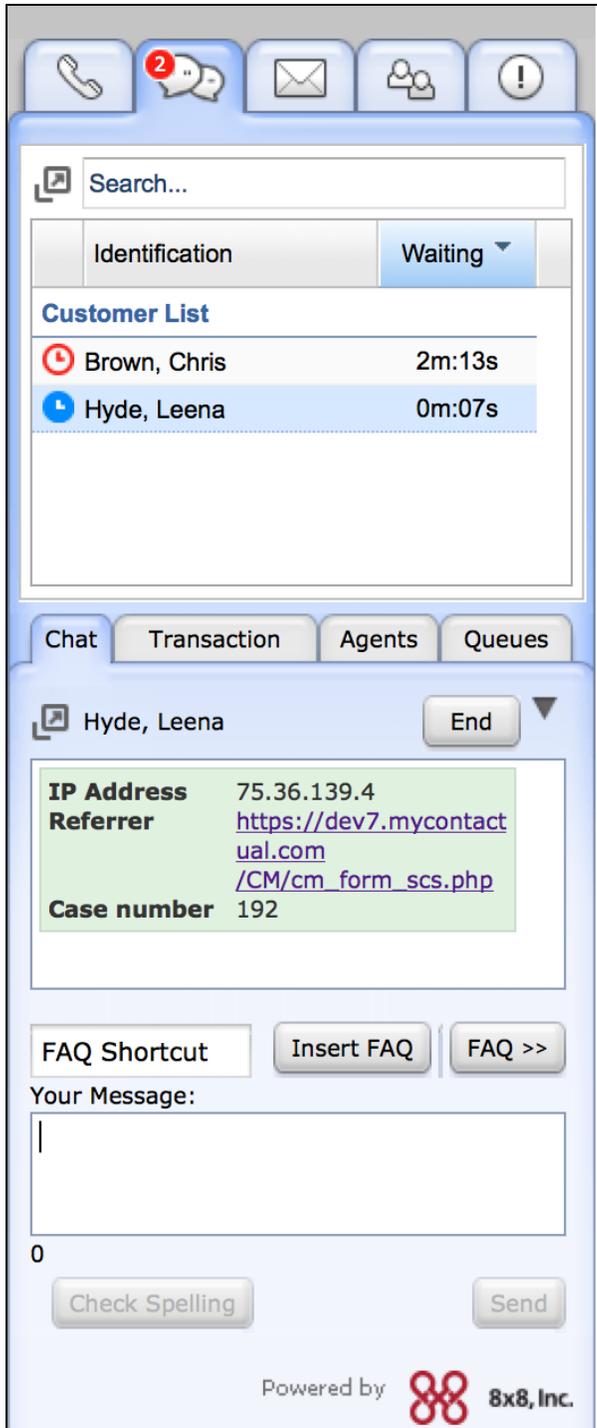


5. Status icons indicate if customer has sent you a message and waiting for your response. If the customer waiting time exceeds SLA, an alert icon in red shows up in the chat list. For details refer to

Table 1: Multi Chat Indicators.



6. To accept a second incoming chat, click **Accept**. The customer chat list gets updated automatically.



The screenshot displays a chat application interface. At the top, there is a navigation bar with icons for phone, chat (with a red '2' notification), email, agents, and help. Below this is a search bar labeled 'Search...'. A section titled 'Identification' shows 'Waiting' with a dropdown arrow. The 'Customer List' contains two entries: 'Brown, Chris' with a 2m:13s timer and 'Hyde, Leena' with a 0m:07s timer. Below the list are tabs for 'Chat', 'Transaction', 'Agents', and 'Queues'. The 'Chat' tab is active, showing a chat window for 'Hyde, Leena' with an 'End' button. The chat window displays technical information: IP Address (75.36.139.4), Referrer (https://dev7.mycontactual.com/CM/cm\_form\_scs.php), and Case number (192). Below this are buttons for 'FAQ Shortcut', 'Insert FAQ', and 'FAQ >>'. A text input field labeled 'Your Message:' is present, with a '0' character count below it. At the bottom of the chat window are 'Check Spelling' and 'Send' buttons. The footer indicates the interface is 'Powered by 8x8, Inc.' with the 8x8 logo.

7. Pop out chat window as desired. When you are done with chat, terminate the chat session by clicking **End**.

8. The chat enters post processing state allowing you to complete any pending task related to the chat.

The screenshot displays a chat interface for 'John Smith' with a 'Busy' status and a timer of 1m:49s. A 'Customer List' table is visible, with the following data:

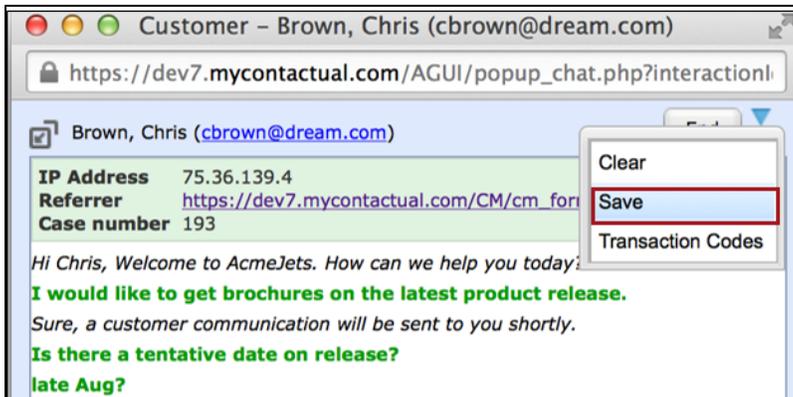
Customer ID	Time
126	1m:46s
127	0m:04s

The row for customer 127 is highlighted with a red box. Below the list, the chat interface shows a 'Post Processing' state for chat ID 127, also highlighted with a red box. The state includes a timer of 0m:04s and an 'End Post Processing' button. The chat history shows a customer message: 'Hi, I would like to know the status of my order number 110.' and a system response: 'It is scheduled for delivery 9/15 at 10 am. Your chat session has ended.'

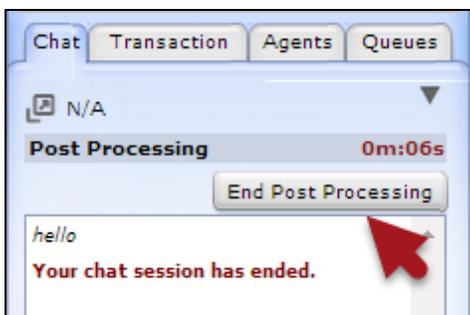


**Note:** While Post Processing is honored for each individual chat interaction, your agent's status continues to be busy while handling multiple chats.

9. To save the chat transcription, click  and select **Save** from the menu.



10. Click **End Post Processing** to complete the session.



 **Note:** The customer name remains in the chat list while the post processing window is open. Closing the popup chat windows closes the window but does not end the chat.

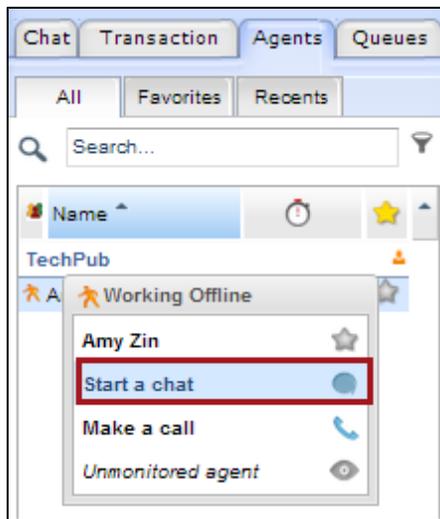
## Agent-to-Agent Chat

Agents can have an unlimited number of chats with other agents of the same tenant.

### To initiate a chat with an agent:

1. In Agent Console, find the agent you wish to chat with from the agents list.
2. Click on the agent's name and select **Start a chat**.

The chat window opens.



3. Type your message and click **Send** or press **Enter**.



**Note:** Status icons indicate pending agent chat messages. These icons disappear when you respond to the message. For a complete description of the status icons refer to Table 1: Multi Chat Indicators

4. Click **End** to finish a chat session.

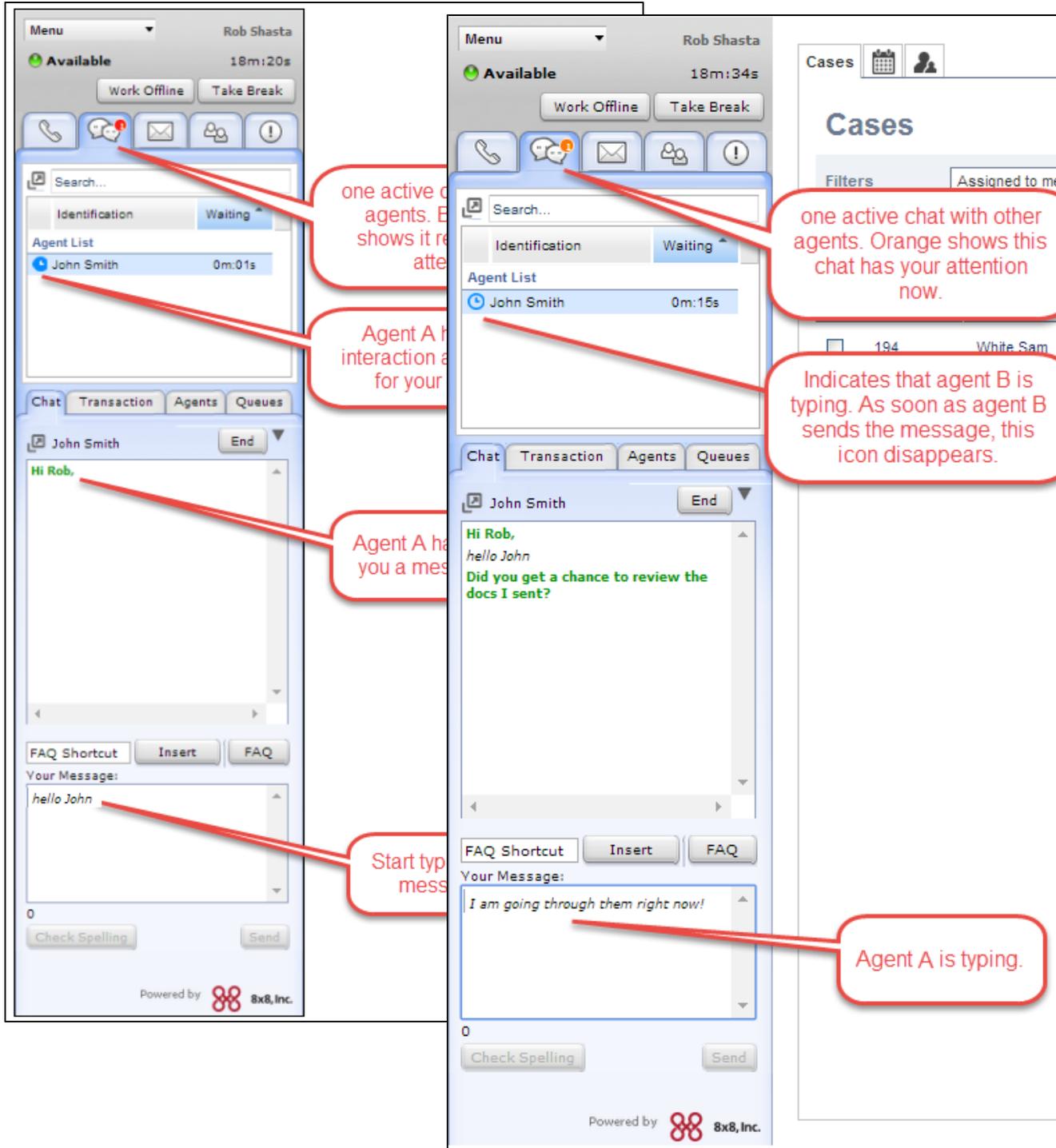


**Note:** There is no accept or reject button for agent-to-agent chat. The chats are received automatically.

As agent B, the moment you receive a chat request from agent A, the number on the chat tab  starts blinking red. In addition,  indicates a chat requires your response. Notice that agent A appears in the **Agent List**.

**To process an incoming chat from an agent:**

1. In Agent Console click on the **Chat** tab.
2. Start typing your response in **Your Message** text box.
3. Click **Send**.



## Multi-Chat Table

The following table shows the symbols and their meaning in multi-chat:

Figure 1: Table 1: Multi-Chat Symbols

Symbol	Description
	A chat has arrived and is waiting for the agent to accept.
	A chat is offered to the agent and is waiting to be accepted or rejected.
	Accept the offered chat.
	Reject the offered chat.
	There is one active customer chat for the agent. Orange indicates that the agent has sent his response to the customer.
	There is one active customer chat for the agent pending agent's response. Red indicates it is past SLA.
	Indicates the customer/agent has sent an interaction and is waiting for agent's response.
	Indicates the agent has read the message, but has not responded yet. <b>Note:</b> Once the agent responds to the chat message, the timer icon disappears.
	Alerts the Customer has sent an interaction and is waiting for longer than targeted service level. There is no such alert for an agent-to-agent chat.
	Indicates the agent has read the message that was pending longer than 30 seconds.
	Indicates the chat is in post processing state after the agent has ended the interaction.
	There is one active agent chat for the agent. Orange indicates that you have responded to the other agent and not yet reached SLA.
	There is one active agent chat for the agent. Red indicates that there has been more than 30 seconds since you last responded and the agent is waiting for your response.

The following diagram shows multi-chat symbols from an agent's point of view:



## Enhanced Control on Agent Status

In 8.1 release, we offer agents the flexibility to stop new chat interactions and wrap up the chat sessions in progress while handling multi-chat. With this enhancement, agents winding up for the day can block new chat interactions being offered to them and manage the workload better. In the control panel, agents are offered **Stop New** and **Resume** buttons.

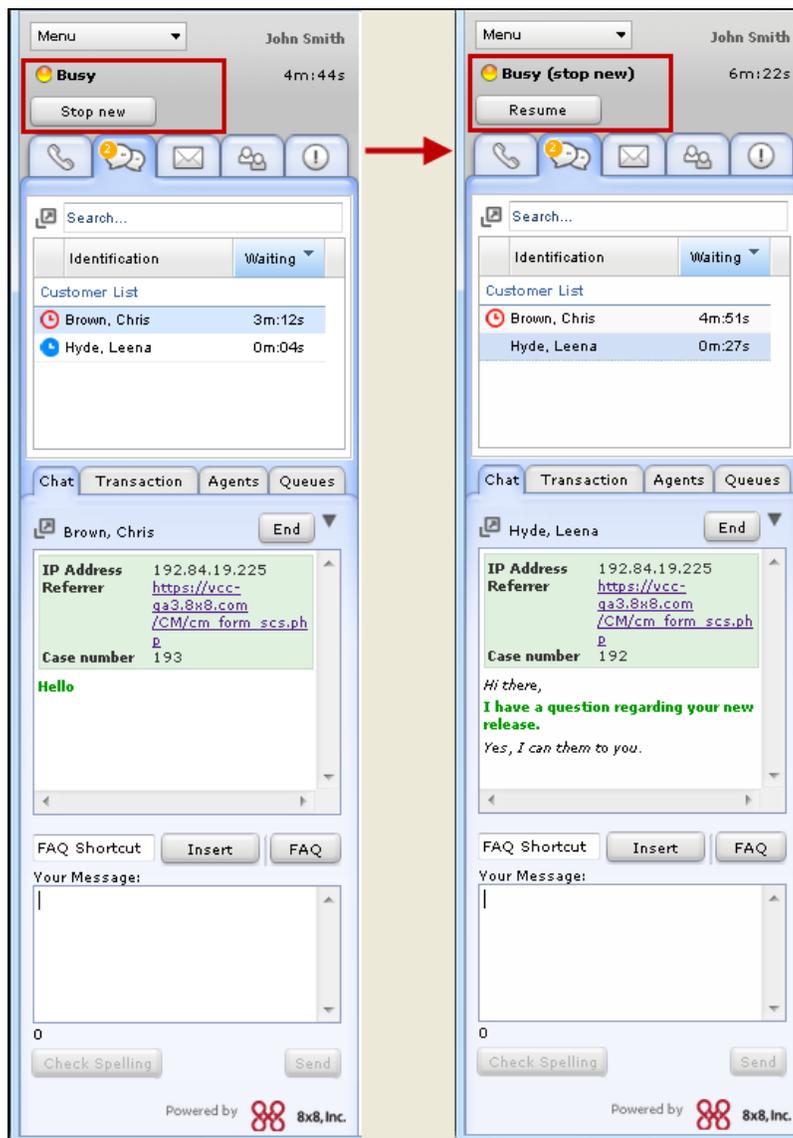
- Clicking **Stop New** blocks incoming chat requests.
- Clicking **Resume** allows incoming chat requests.

## Features

- *Stop New* is limited to queued chat interactions only.
- *Stop New* button is only available in busy state during multi-chat.
- Monitoring shows the change of agent status to stop new.

**To stop new interactions:**

1. While processing chat interactions, you are automatically on busy status.
2. Click **Stop New** button.



3. Your status changes to **Busy (Stop New)**. While in this state, you are not offered any new chats.
4. Wrap up the existing chat sessions.
5. On wrapping up the last chat session, your status changes to **Post Processing** and then to **Work Offline** instead of being offered a new chat.

**To resume new interactions:**

1. While on **Busy (Stop New)** state, you are blocking any new chat requests.
2. If you wish to resume, click **Resume**.
3. Any queued chat request is offered to you immediately.

## Monitoring Agent Status

As a contact center supervisor, you can monitor agents blocking new chat requests. The Monitoring window shows agents' change of status to Busy (Stop New).

Monitoring <span style="float: right;">+ <a href="#">New monitoring window</a></span>											
<span>Queue Management</span>   <span>Campaign Management</span>   <span>Agent Management</span>   <span>Playback</span>   <span>Setup</span>											
<span>Real time</span>   <span>Last 30 Min</span>   <span>From beginning of day</span>   <span>Monitor</span>											
<input type="checkbox"/> Logged in											
Agent	Current Status	Status C. Code	Time on Status	Phone Line 1	Phone Line 2	Active Queues	Last Login	Tot. Time Log. In	Tot. Time Trans	Max Concurrent Chats	Active Customer Chats
<b>Acme - Marketing</b>											
<a href="#">Joe Baker</a>	Logged Out		09h:24m	n/a	n/a	<a href="#">6 of 6</a>	n/a	00m:00s	00m:00s	1	0
<b>Acme - Sales</b>											
<a href="#">Chris Gates</a>	Logged Out		09h:24m	n/a	n/a	<a href="#">11 of 11</a>	n/a	00m:00s	00m:00s	1	0
<a href="#">Ernie Alonso</a>	Work Offline		00m:39s	n/a	n/a	<a href="#">4 of 4</a>	n/a	00m:14s	00m:00s	1	0
<a href="#">John Smith</a>	Busy (Stop New)		14m:42s	n/a	n/a	<a href="#">8 of 10</a>	n/a	10m:31s	08m:50s	3	3
<a href="#">Rob Shasta</a>	Logged Out		09m:53s	n/a	n/a	<a href="#">8 of 9</a>	11:00:42	05m:16s	00m:00s	1	0

## Script Decoupling

We have made significant improvements in handling scripts and channels. In 8.1, the IVR script is independent of the channel. A new tab called Scripts is added to the Configuration Manager Interface. The administrators can now create and modify scripts independent of the channels and associate them with channels as necessary.

### Benefits

- Ability to create scripts independent of channels
- Ability to assign a script to multiple channels
- Ability to organize scripts by media such as phone, email, and chat
- Ability to copy content from an existing script. Any changes to the existing script does not reflect in the new script.
- Ability to link the new script to an existing script. Any changes to the existing script automatically reflects in the new script.
- Reduced time spent on creating scripts by copying or linking to an existing script. **Copy** or **Link to** is only associated with the content of the script and does not affect the properties of the new script.

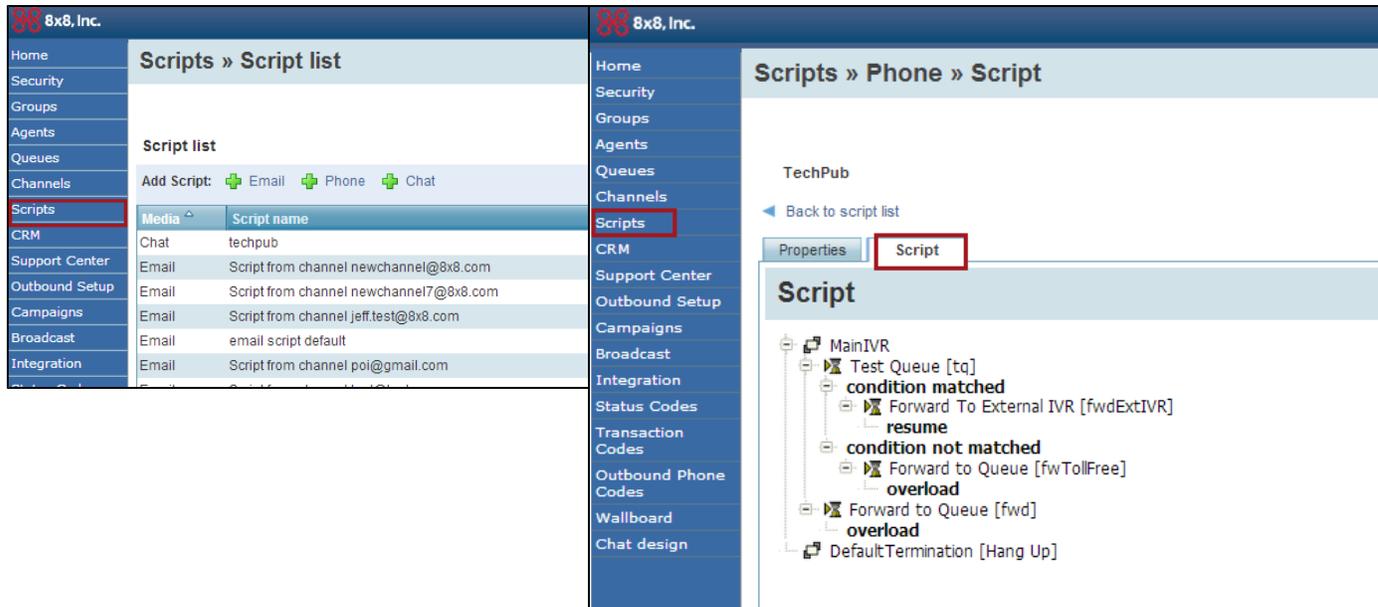
### Pre 8.1 Interface

Prior to 8.1, administrators could create IVR scripts to facilitate callers navigate through menus and thus enhance the caller experience. The scripts were created by IVR administrators and associated with a channel. Using the same script across multiple channels required the IVR administrator to create the script for a channel and then modify the **Use script from channel** for other channels. This created an inherent dependency between channels.



## Post 8.1 Interface

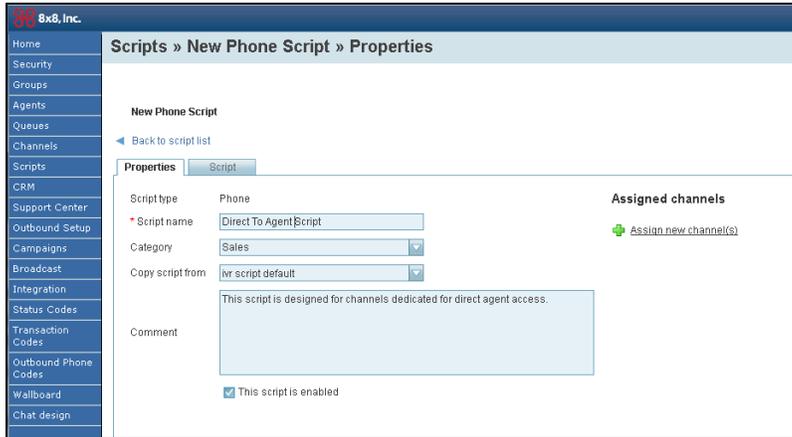
In the new 8.1 release, IVR Script is independent of the channel. A new tab, **Scripts**, is part of the Configuration Manager interface. The administrators can now create and modify scripts independent of the channels and associate them with channels as necessary.



Scripts can be of type Phone, Email and Chat. You can create a script of any media by clicking the corresponding link in the scripts main page.

### To design a script for a phone channel:

1. In Configuration Manager, navigate to **Scripts** from the navigation menu.
2. Click  **Phone** link.
3. Create a unique script name. This field is mandatory and cannot be empty.



The screenshot shows the 'Scripts » New Phone Script » Properties' page in the 8x8, Inc. Configuration Manager. The left sidebar contains a navigation menu with items like Home, Security, Groups, Agents, Queues, Channels, Scripts, CRM, Support Center, Outbound Setup, Campaigns, Broadcast, Integration, Status Codes, Transaction Codes, Outbound Phone Codes, Wallboard, and Chat design. The main content area is titled 'New Phone Script' and has a 'Back to script list' link. Below this, there are two tabs: 'Properties' (selected) and 'Script'. The 'Properties' tab contains the following fields:

- Script type: Phone
- Script name: Direct To Agent Script (with a red asterisk indicating it is mandatory)
- Category: Sales (dropdown menu)
- Copy script from:ivr script default (dropdown menu)
- Comment: This script is designed for channels dedicated for direct agent access. (text area)
- This script is enabled

On the right side, there is an 'Assigned channels' section with a green plus icon and a link that says 'Assign new channel(s)'.

4. Select a **Category**.

A drop-down menu displays the list of categories. The category can be empty or the user could be allowed to create one on the fly.

5. You can copy the script from or link it to an existing script.



**Note:** Copy script is only associated with the content of the script and does not affect the properties of the new script.

6. Add **Comments** for additional notes if desired.
7. Select **This script is enabled**. The script can be used in IVR without being associated with a channel.
8. Assign **New Channels** if desired.
9. Click **Save** to go to the script tab.
10. Click **MainIVR**. The **[add]** link appears.



11. Add the desired Objects.
12. Click **Save**.
13. To undo the changes, click **Revert**.

To design Email and Chat scripts, select  **Email** or  **Chat** and then follow steps 3 to 12.

For detailed overview of IVR scripts, refer to [Interactive Voice Response](#).

## Direct Agent Routing

In this release we introduce Direct Agent Routing (DAR), a powerful and flexible set of script functions to allow agent's call handling. But first let us have a recap of the legacy DAA.

### Pre 8.1--Direct Agent Access

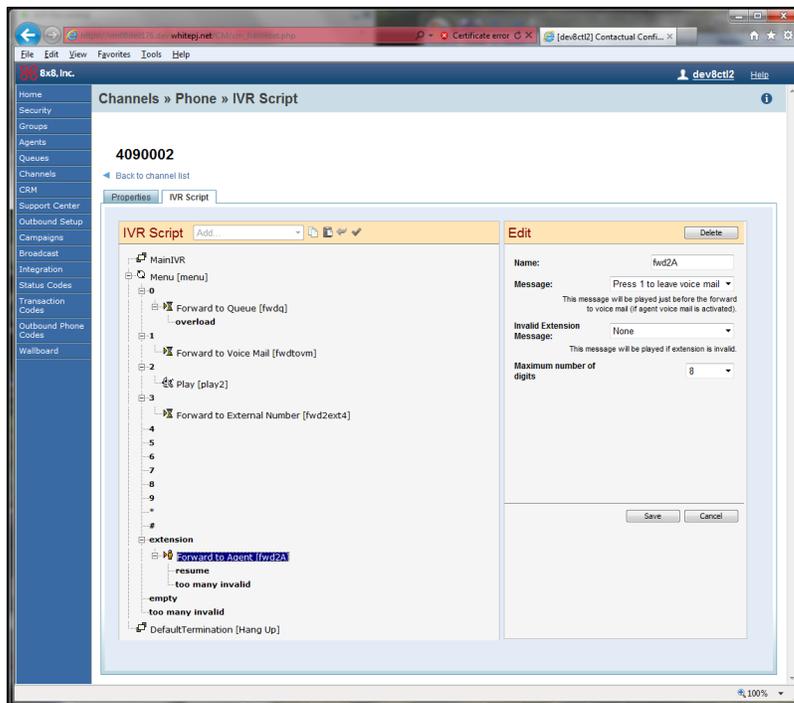
Direct Agent Access (DAA) is now a legacy feature. It gives callers the option of directly reaching an agent in the Virtual Contact Center environment by dialing the agent's DAA number in an IVR menu. The DAA number is validated (checked if it exists and matches a particular agent for that tenant) and then the call is placed to the agent. If the agent is not reachable (the agent does not answer within the specified interaction timeout or rejects the call) then the call is directed to the agent's Virtual Contact Center voicemail.

Agents must be assigned DAA numbers that are unique within the tenant. The assigned DAA numbers are not related to any other set of numbers. DAA numbers may be assigned to mimic numbers used by other systems.

### DAA Call Handling Constraints

- DAA requires callers to enter an agent's DAA number exclusively during IVR Menu treatments.
- DAA calls are always presented to an agent regardless of the agent's current state.
- Unanswered DAA calls may be directed to an agent's voicemail with primitive opt-out controls.
- Queue calls are presented to agents who are *Available* even if they are on a DAA call.

- *Forward to Agent[ ]* logic is difficult to comprehend due to its implied action within IVR Menus.



## Pre 8.1 Direct Agent Access

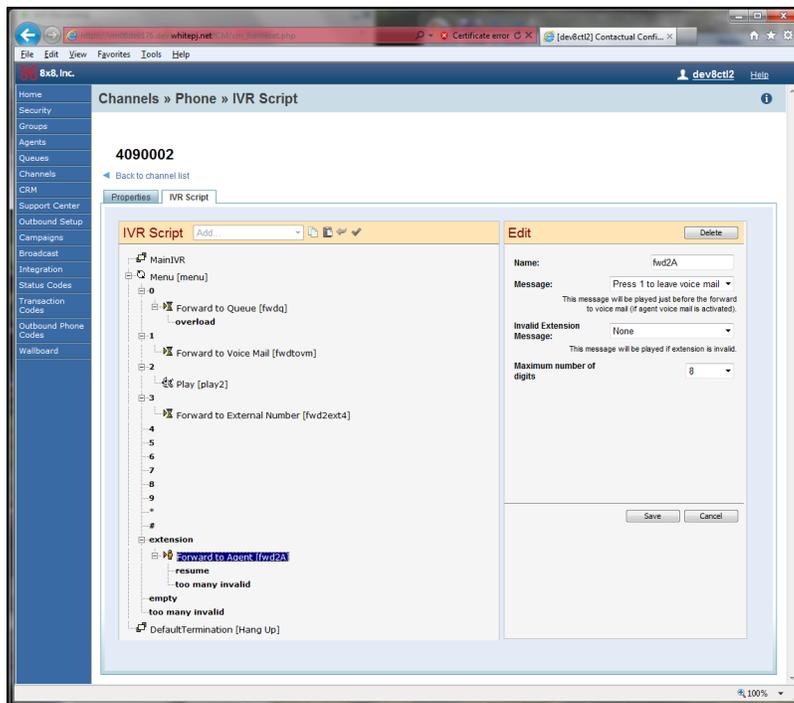
Direct Agent Access (DAA) is now a legacy feature. It gives callers the option of directly reaching an agent in the VCC environment by dialing the agent's DAA number in an IVR menu. The DAA number is validated (that is checked if it exists and matches a particular agent for that tenant) and then the call is placed to the agent. If the agent is not reachable (that is the agent does not answer within the specified interaction timeout or rejects the call) then the call is directed to the agent's Virtual Contact Center voicemail.

Agents must be assigned DAA numbers that are unique within the tenant. The assigned DAA numbers are not related to any other set of numbers. DAA numbers may be assigned to mimic numbers used by other systems.

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- *Forward to Agent[ ]* logic is difficult to comprehend due to its implied action within IVR Menus.



## Introducing Direct Agent Routing

In addition to legacy DAA call handling, DAR provides a powerful and flexible set of script functions which allows refined selection and control of calls to be directed to an individual agent. This release introduces the following new Direct Agent Routing (DAR) objects and enhancements:

- **GetValue**—is extended to be able to capture an agent's assigned DAA number. The caller is prompted to input a valid DAA number which is then validated.
- **Set Agent**—finds agents based on:
  - Channel linked to Direct-In-Dial (DID) #
  - Look up local CRM for **case created by**, **case last worked by**, and **case assigned to**
  - Set a fix agent selection
- **Transfer to Agent**—directs a call to an agent. It can be used in conjunction with **Set Agent** to find an agent or by itself. This supports separate logic as why a call may not reach the target agent depending on the agent's real-time state.
- **Transfer to Agent Voicemail**—transfers call to an agent's voicemail typically if **Transfer to Agent** is not successful.

## Benefits

- Identify the agent the customer should talk to based on:
  - Who created the case associated with the customer
  - Who is assigned to the case
  - Who last worked on the case
  - Agent DID number that was shared with the customer
- Transfer the customer call to the right agent based on agent status, and change agent status to busy after accepting the call
- Control agent's status during a DAR Call
- Allow the caller to leave a voicemail for the agent if the agent is not available
- Allow caller to take an option to divert if they prefer not to leave a voicemail

## Limitations

DAR calls do not yet support the following features:

- Post Processing state
- Transaction Codes

## Requirements

The agent must be assigned a Direct Access Number to be eligible for Direct Agent Routing.

## Setting up Direct Agent Routing in IVR

### To set up Direct Agent Routing:

1. In Configuration Manager, navigate to **Scripts** from the navigation menu.
2. Click  **Phone**.
3. On the **Properties** tab, enter a script name.
4. Select a **Category** or create a new one.
5. Enter additional notes in **Comment** text box.

**BxB, Inc.**

Home  
Security  
Groups  
Agents  
Queues  
Channels  
Scripts  
CRM  
Support Center  
Outbound Setup  
Campaigns  
Broadcast  
Integration  
Status Codes  
Transaction Codes  
Outbound Phone Codes  
Wallboard  
Chat design

### Scripts » New Phone Script » Properties

New Phone Script

[Back to script list](#)

**Properties** | **Script**

Script type: Phone

\* Script name: Direct To Agent Script

Category: Sales

Copy script from: ivr script default

Comment: This script is designed for channels dedicated for direct agent access.

This script is enabled

**Assigned channels**

[+ Assign new channel\(s\)](#)

6. Click **Save**.
7. On the **Script** tab click **Main IVR**.
8. Click [ **add** ] to add the desired objects.

**Scripts » Phone » Script**

**DirectToAgent**

◀ Back to script list

Properties Script

**Script**

- MainIVR
  - Transfer to Agent [ToJohn]
    - busy
      - Transfer to Agent Voice Mail [Johns VM]
        - Opt Out
        - agent not configured for VM
        - invalid agent id
      - on break
      - working offline
    - logged off
      - Transfer to Agent Voice Mail [LoggedOff]
        - Opt Out
        - agent not configured for VM
        - invalid agent id
      - rejected by agent
      - invalid agent id
      - ring no answer
  - DefaultTermination [Hang Up]

9. Click **Save**.

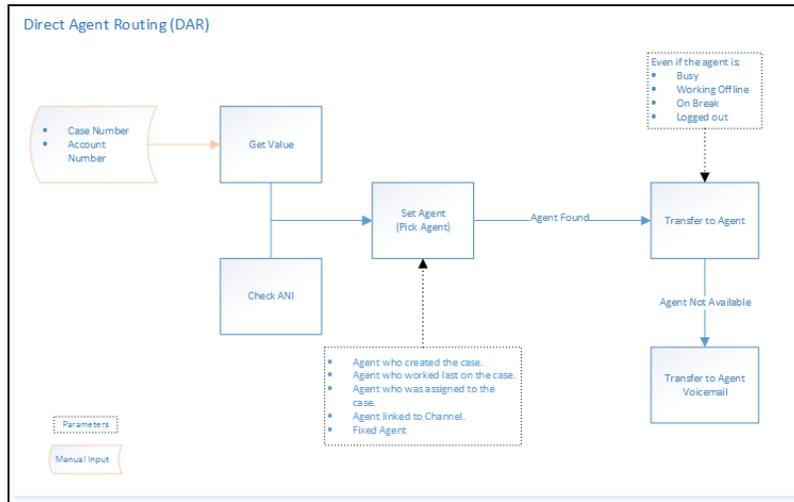
For sample use cases and scripts, refer to [Direct Agent Routing Use Cases](#) document.

## Process Flow for Direct Agent Routing

A typical process flow for Direct Agent Routing involves the following steps:

1. Get input such as case ID or Account number (GetValue) from the caller or caller ID (Check ANI). The system then searches CRM for matching records.
2. On finding a matching customer or case record, pick agent who worked on the case or created the case or is assigned to the case. For details on options, refer to [Set Agent](#) object.

3. If agent is found, transfer the call to the agent. You can transfer to agent irrespective of agent's current status OR
4. If agent is not available, transfer to agent's voicemail.



The following table summarizes the new DAR objects:

DAR Object	Description
Set Agent	<p>Set Agent object facilitates direct agent routing. Before using Set Agent object in your script, you must get value (account number or case number) from the caller or check ANI. If these objects succeed in finding a match, you can then use Set Agent object to pick the agent you wish to reach based on the following parameters.</p> <ul style="list-style-type: none"> <li>■ <b>Case created by:</b> Find the agent who created the case.</li> <li>■ <b>Case last worked by:</b> Find the agent who last worked on the case.</li> <li>■ <b>Case assigned to:</b> Find the agent who is assigned to the case.</li> <li>■ <b>Channel linked to:</b> Find the agent who is linked to the channel the call was channeled through. Use this option to direct an incoming call to an agent directly.</li> <li>■ <b>None:</b> Find an agent by name. By selecting this option, you can select a specific agent to direct the call to using <b>Fix Agent</b>.</li> </ul> <p><b>Fix Agent:</b> Click the <b>Choose Agent</b> link and select an agent from the list.</p>
Transfer to Agent	<p>The Transfer to Agent object connects the caller to the agent.</p> <ul style="list-style-type: none"> <li>-Use this object with Set Agent. For this to work, you must have picked an agent using <b>Set Agent</b>.</li> <li>-Use this object without Set Agent to transfer calls directly to the agent with a personal</li> </ul>

DAR Object	Description
	<p>channel. The agent must be assigned with a personal channel.</p> <p>Transfer to Agent object provides options which support transferring a call to agent even if status is:</p> <ul style="list-style-type: none"> <li>▪ busy</li> <li>▪ on break</li> <li>▪ working offline</li> <li>▪ logged off</li> </ul> <p>If you do not select any option, then the call is transferred only if the agent status is Available.</p>
Transfer to Agent Voicemail	<p>This object allows a caller to leave a voicemail for an agent. It assumes the agent is already chosen using Set Agent object or Get Value object.</p>
Get Value	<p>Use the Get Value object to request the caller to provide an agent's extension number. On selecting this option, the checkbox 'Entry is mandatory' is checked automatically and greyed out. You will be given the option to set the maximum length of extension. By default, it takes 8 digits.</p>

## Reporting on Direct Agent Calls

The agent is not offered any post processing activity for a DAA call. Contact Center supervisors can track DAA calls through the Detailed Transactions Activity report.

### To access the Detailed Transactions Activity report:

1. In Agent Console, select **Report** from the menu.
2. Generate a report based on the existing reporting template.
3. Select **New Report**.
4. Select **Detailed Transaction Activity** report from the left panel and click **Next**.

Historical Reports

## New Historical Report Wizard

1

Step

Select Available Report and see preview

2

Step

Specify datefields criteria to generate report

Specify datefields criteria to generate report

\* Selected Report : Detailed transactions activity

\* Report Title :

Data Granularity : 1 day Start Date :

Date Range : Today End Date :

Selection : [Selection Window](#)

Show Totals

Back
Save
Run
Save and Run
Cancel

5. Enter the desired time range and select the desired queues.
  6. Select **Save** and **Run**.
- A new report generates and opens in Excel.

Detailed transactions activity								
Period: 08/21/2014 - 08/27/2014								
Granularity: day								
Report Generated on: 08/26/2014 15:34:47								
Period	Transaction	Original Transaction	Media	Create time	Direction	Type	Channel	Queue
8/22/2014	57		Phone	8/22/2014 22:36	inbound			S252111.phcIn
8/22/2014	58		Phone	8/22/2014 22:37	inbound			S252111.phcIn
8/22/2014	59		Phone	8/22/2014 22:37	inbound	DAA		S252111
8/24/2014	69		Phone	8/24/2014 21:18	inbound	DAA		S252111
8/24/2014	70		Phone	8/24/2014 21:19	inbound			S252111.phcIn
8/24/2014	71		Phone	8/24/2014 21:20	outbound			

## Configuring 8x8 Virtual Contact Center for Single Sign-On Integration with NetSuite

The Single Sign-On integration allows a common authentication for NetSuite and Virtual Contact Center. By logging in to NetSuite, you are automatically signed in to Virtual Contact Center. The user is required to enter the authentication information only once per session.



**Note:** Moving to Single Sign-On integration from Individual System Sign-On is one way. Once you set up Single Sign-on integration for your tenant, you cannot revert to Individual System Sign-On.

### Benefits of Single Sign-On

- Easy installation using SuiteBundler—NetSuite user is mapped to Virtual Contact Center Agent profile.
- Reduced and convenient Virtual Contact Center sign-in time while working on NetSuite.
- Improved security—we do not store the NetSuite user credentials and password in Virtual Contact Center to reduce the chance of login credentials being compromised.
- Enhanced User experience—It allows the users to seamlessly sign in to Virtual Contact Center from the NetSuite dashboard. The advantages are:
  - No need to remember or enter Virtual Contact Center user credentials.
  - Full functions of Virtual Contact Center and NetSuite.
  - No need to refresh Virtual Contact Center while using NetSuite.



**Note:**

- iFrame is not supported in the new release—The 8x8 Virtual Contact Center appears on a separate browser window.
- Single Sign-On is the only option for new customers. The existing customers cannot revert to non-SSO once they choose SSO.

### Limitations

- When moving from individual system sign on to single sign on integration, administrations should be aware that moving to single sign on is required for all agents. Once on single sign on you won't be

able to go back to individual system sign-on.

- You can associate only one tenant per Virtual Contact Center bundle. For workaround, contact 8x8, Inc. professional services.

## Configuring NetSuite Integration

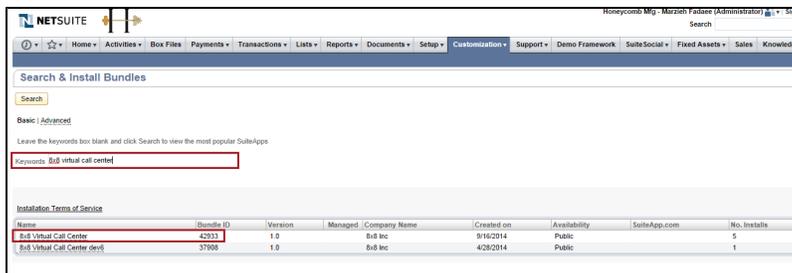
Setting up NetSuite for Single Sign-On integration with 8x8 Virtual Contact Center requires you to:

### Step 1: Install Virtual Contact Center Bundle

#### To install Virtual Contact Center Bundle:

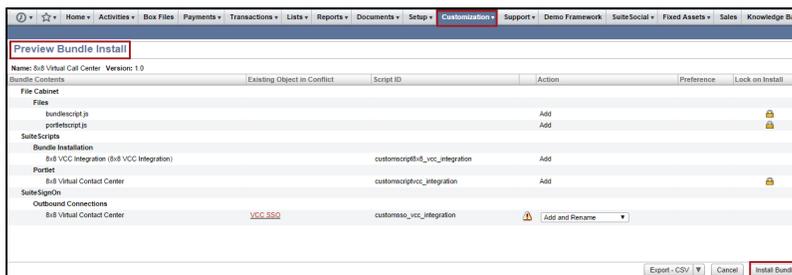
1. Log in to NetSuite website as an administrator.
2. Navigate to **Customizations > SuiteBundler > Search & Install Bundles**.
3. Type *8x8 Virtual Call Center* and click **Search**.
4. Click **8x8 Virtual Call Center** from the list.

A new page opens containing the bundle details.



5. Click **Install**.

The Preview Bundle Install page opens.



6. Click **Install Bundle**.
7. Click **OK** at the prompt.

A page opens with a list of installed bundles. The new bundle status is pending.

8. **Refresh** the page to see the check mark under 8x8 Virtual Call Center status.

Action	Name	Bundle ID	Version	Managed	Abstract	Documentation	Status	Owner	Installed From
⌵	-Loading ->	40565		No			Pending	8x8 Virtual Call Center (TSTDV1144734)	Production
⌵	3 Way Match on Items	27954	2	No	3 Way Match on Items			8x8 Inc. Wholesale Distribution - 2013.1 (TSTDV105864)	Production
⌵	Availability By Location	15404		No			✓	Ramey Inc. Wholesale Distribution V2011.1.112 (TSTDV084200)	Production

## Step 2: Create Single Sign-On Connection

### To create the SSO Connection:

1. On the **Setup** menu, click **Integration > SuiteSignOn**. A list of bundles appear.
2. Click **Edit** next to 8x8 Virtual Contact Center.

The Suite Sign On page appears containing the **Connection Points** tab.

URL	Integration Variables	Display Type	Display Context	Record Type
https://vcc-dev8.8x8.com/~pocelm/WEB-tenant/AGUI/login_ns_sso.php?tenant=devic83		Portlet	8x8 Virtual Contact Center	

3. Edit the **URL** to match your cluster URL.

Your cluster URL may be in this format: *https://vcc-naX.8x8.com/AGUI/login\_ns\_sso.php?tenant=yourtenantname*.

Where *X* is the Virtual Contact Center instance your tenant is created on, and *yourtenantname* is your tenant ID.

For example, AcmeJets has the following URL: *https://vcc-na8.8x8.com/AGUI/login\_ns\_sso.php?tenant=AcmeJets*

4. Click **Save**.

## Step 3: Enable Screen Pop in Configuration Manager

Screen pop refers to the process that allows agents to access and preview customer records before accepting a call, and reduces time in identifying the customer. To enable automatic screen pop for interactions, you must configure screen pop settings in Configuration Manager.

### To enable Screen Pop:

1. In Configuration Manager, navigate to **Integration > Screen Pop** tab from the Navigation menu.

The screenshot shows the 'Integration » Screen Pop' configuration page in the 8x8 Configuration Manager. The left navigation menu includes options like Home, Security, Groups, Agents, Queues, Channels, Scripts, CRM, Support Center, Outbound Setup, Campaigns, Broadcast, Integration (highlighted), Status Codes, Transaction Codes, Outbound Phone Codes, Wallboard, and Chat design. The main content area has tabs for CRM API, CRM Triggers, Screen Pop (selected), and API Token. The 'Enable Screen Pop' checkbox is checked. Under 'Target Attributes', the 'Target' is set to 'NetSuite' (with 'type:Local' below it) and the 'Integration Type' is set to 'SSO'. Below these are input fields for Account, Service Name, Login URL, Branding URL, and a URL field containing '/NewGenMashUp/MashUp.html?accountid=TSSTRV1220860'. There are also several checkboxes for 'Enable Customization', 'Script URL', 'Use Remote Login', 'API Tokens', 'Use client login session to pop', and 'Launch native login window at agent login'. A 'Landing Pages' section is partially visible at the bottom.

2. Select **Enable Screen Pop**.
3. Select **NetSuite**.  
By default, the **Integration Type** is SSO.
4. Click **Save**.

#### Step 4: Map NetSuite Users with Virtual Contact Center Agent Accounts

For NetSuite users to log in to Virtual Contact Center, you must create an agent account in Configuration Manager. You must then link the agent account to the NetSuite user account with the same email address.



**Note:** If an agent changes email ID using the Agent Console, the Virtual Contact Center login fails.

#### To Connect the NetSuite user to Virtual Contact Center:

1. In Configuration Manager site, navigate to the Agents tab to create a new agent for the NetSuite User, or use an existing agent account.

2. In **General** tab, enter the agent's information.

Make sure the agent's email address matches the employee's email address in NetSuite.

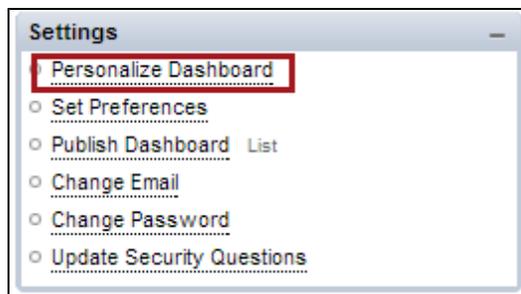
3. Click **Save**.

## Step 5: Create Virtual Contact Center Portlet

As a NetSuite user, you must add a portlet to initiate a login session with Virtual Contact Center.

Log in to Netsuite account and follow the instructions below to create a Virtual Contact Center portlet:

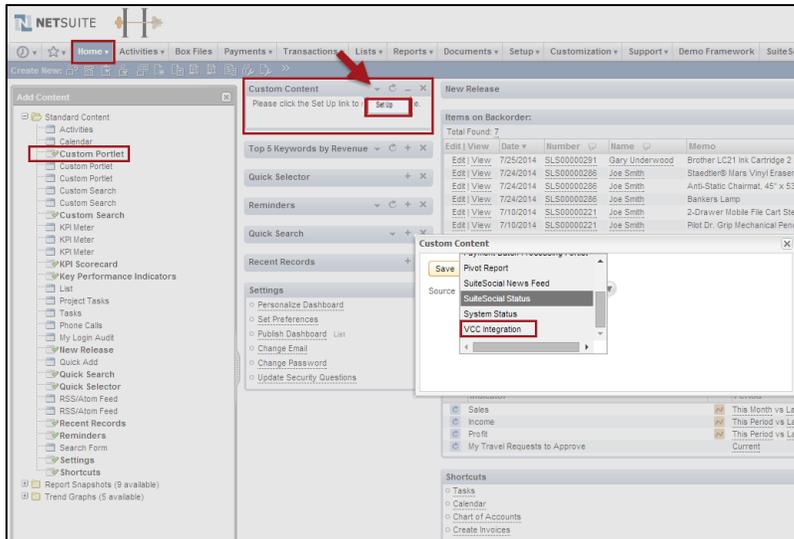
1. Navigate to **Home > Dashboard**.
2. On the Dashboard page click **Personalize Dashboard** link or , find **Settings** , then click **Personalize Dashboard**.



3. Click **Custom Portlet** in the list of available portlets in the left tree.

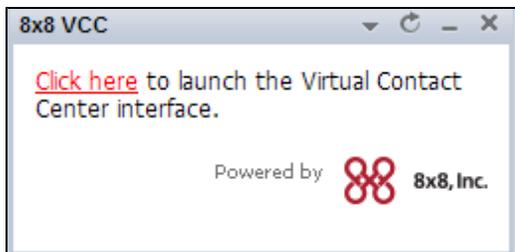
An empty portlet is being created.

4. In the new portlet, click  on the top right corner.
5. Select **Setup**.
6. Select **VCC Integration** from the list.



7. Click **Save**.

The 8x8 Virtual Contact Center portlet is now displayed on the dashboard. Drag and drop it to the desired location on the dashboard.



To launch Virtual Contact Center, click the link inside the portlet.

## Step 6: Launch Virtual Contact Center from NetSuite

### To launch the Virtual Contact Center from NetSuite:

1. Go back to **Home > Dashboard**.
2. Click the link in 8x8 Virtual Office Portlet.

The Virtual Contact Center window launches. Resize and place the window as desired.



**Note:** For a smoother call flow, Virtual Contact Center offers Click-to-Dial API, which allows you to click hyperlinked phone numbers in CRM records to initiate outbound calls from the native NetSuite interface. This eliminates the need to enter an outbound phone number in the Agent Console Control Panel. [Click here](#) to learn how to set up Click to Dial functionality.

## To Uninstall NetSuite SSO

### To uninstall the NetSuite SSO:

1. Navigate to **Customization > SuiteBundler > Search & Install Bundles > List**.
2. Locate the 8X8 Virtual Call Center from the list.
3. Move your mouse over  next to the 8X8 Virtual Call Center.
4. Click **Uninstall**.
5. Refresh the screen to update.

## Configuring 8x8 Virtual Contact Center for Single Sign-On Integration with Salesforce

Virtual Contact Center now supports Open CTI Integration with support for Single Sign-On access from the native Salesforce environment. Salesforce users can launch 8x8 Virtual Contact Center app with just a click and reap the benefits of the integration.

### Benefits

- Ability to launch Virtual Contact Center from the comfort of Salesforce dashboard.
- Reduced sign-in time while working in Salesforce environment
- Improved Security - Salesforce user credentials do not need to be stored in Virtual Contact Center environment
- Support for both Service Console and Non-Console mode in Salesforce
- Ability to dial out calls using native Click to Dial links in Console and Non-Console mode

The integration allows you to perform your Salesforce account activities using the integrated Agent Console with the following features:

- Multichannel support including phone, chat, and voicemail channels
- Visibility to queue status and agent presence
- Screen pop of the matching end user data during inbound interactions
- Screen pop based on caller ID for phone calls
- Screen pop based on case ID for chats
- Ability to search based on arbitrary data (Requires customization)
- Ability to record custom messages for agents
- Ability to track historical data of agent activity using Historical reports (Supervisor only)
- Ability to monitor agent activity (Supervisor only)

### Requirements

- Administrative access to Salesforce account
- Administrative access to 8x8 Virtual Contact Center account

### Limitation

The auto log from an interaction is saved to the Comments field, which limits the data size to 4000 bytes. If an interaction log exceeds 4000 bytes, you cannot save the log.

## Configuring Single Sign-On Integration

Setting up Salesforce for Single Sign-On integration with 8x8 Virtual Contact Center requires you to:

### Step 1: Install the Integration Package

1. Launch the following URL on your browser.

[[[Undefined variable LocalDocumentVariables.Salesforce]]] Production

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti0000000Xzqu>

[[[Undefined variable LocalDocumentVariables.Salesforce]]] Sandbox

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04ti0000000Xzqu>



**Note:** You can get the Virtual Contact Center app from the Salesforce market in future.

2. At the prompt, log in as Salesforce administrator.

You will see the package installation details of the 8x8 Virtual Contact Center.

The screenshot shows the Salesforce interface for installing a package. The main content area is titled "Package Installation Details" and displays the following information:

- Package Name: 8x8 Virtual Contact Center
- Version Name: 8x8 Virtual Call Center
- Version Number: 1.0
- Publisher: 8x8, Inc
- Description: (empty)

Below the metadata, there are two buttons: "Continue" (highlighted with a red box) and "Cancel".

The "Package Components" section shows a table with one component:

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	vcc		Call Center	This is a brand new component.

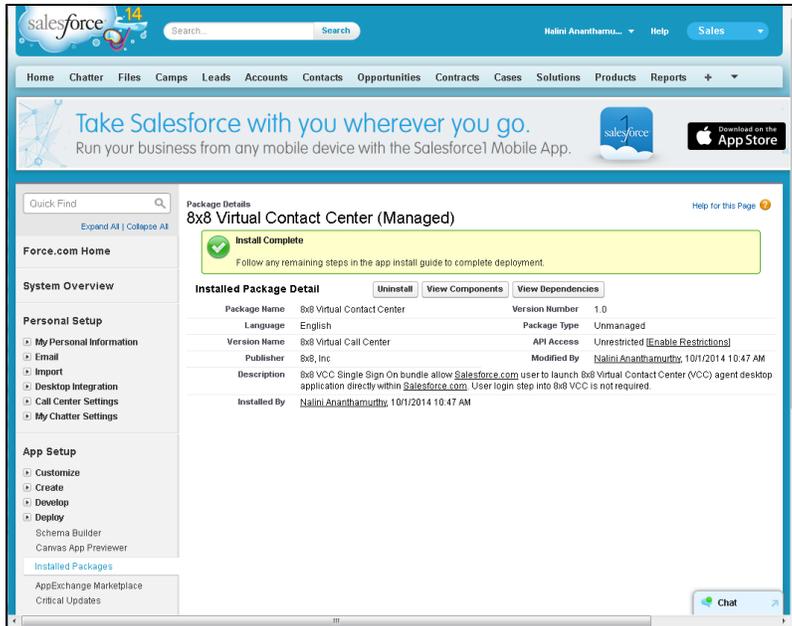
The "Remote Access" section indicates "No records to display".

3. Click **Continue**.

Step 1: Approve Package API Access - Click **Next**.

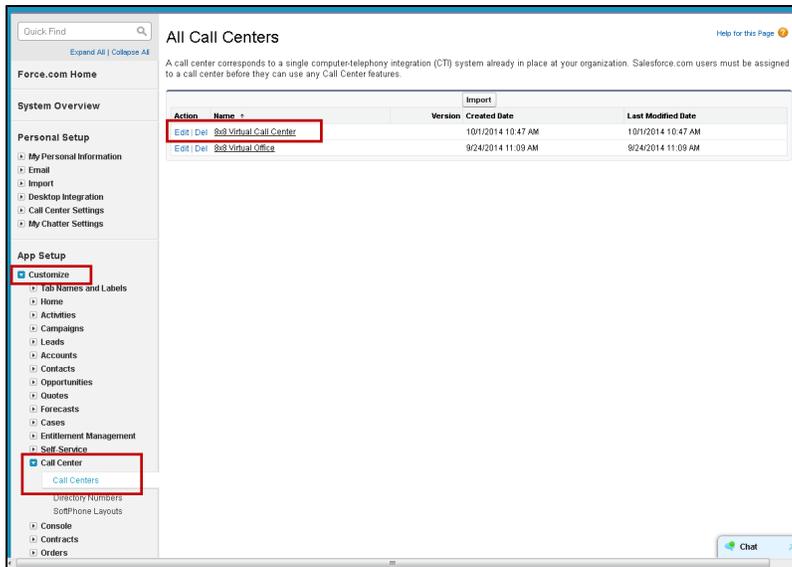
Step 2: Install Package - Click **Install**.

- After successful install, you are notified that the installation is complete.



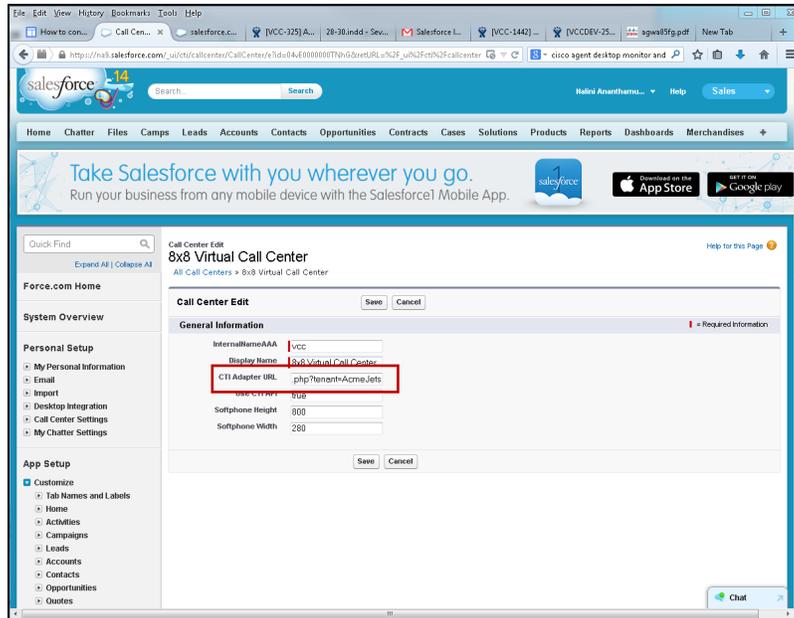
## Step 2: Configure your Virtual Contact Center Tenant for the Integration

- Go to **Set up**.
- In the left navigation menu, click **Customize > Call Center > Call Centers**.



Displays the available call center packages installed.

3. Click **Edit** next to 8x8 Virtual Call Center package.



4. Edit the **CTI Adapter URL** with the URL for your cluster and tenant. The format of the URL should look like *https://vcc-naX.8x8.com/AGUI/loginSSO2.php?tenant=yourtenantname*.
  - naX is the VCC platform instance your tenant is hosted on and
  - yourtenantname is the tenant id of your tenant



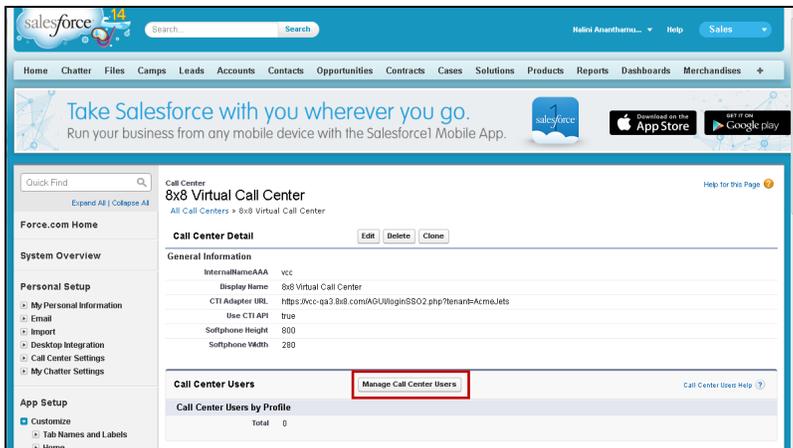
Refer to the [Platform URL Guide](#) to get the cluster URL your tenant is hosted on.

5. Save the setting.

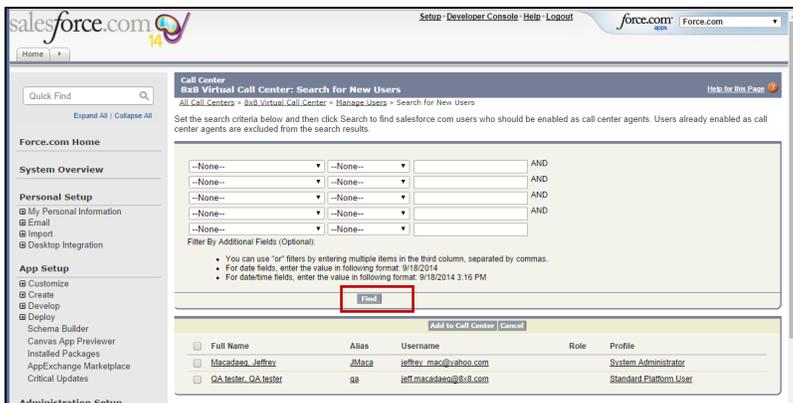
### Step 3: Add Users to the Call Center

In this step, identify and set up Salesforce users acting as call center agents.

1. In the Call center view mode of Virtual Call Center, click **Manage Call Center Users**.

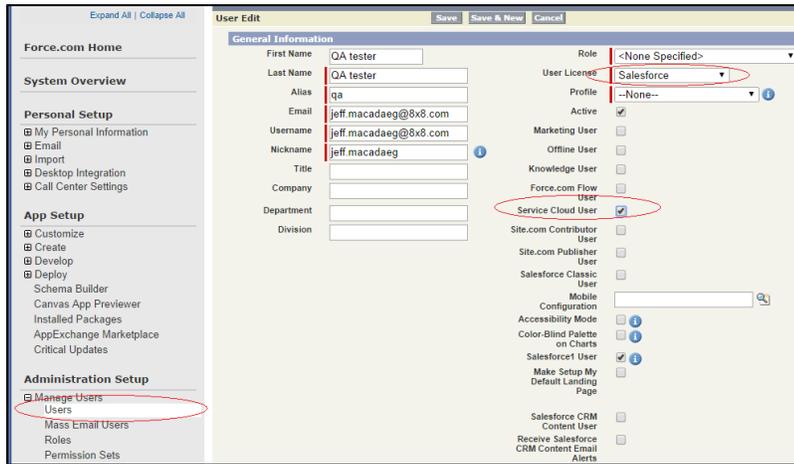


2. Click **Find** to list all users or add filters to search for specific users.



3. From the list of users, select the desired users and click **Add to Call Center**.

4. To allow users to use Service Console, you need to enable Service Cloud User in the agent profile.
  - a. On Setup, Go to **Administration Setup > Manager Users > Users**.
  - b. Edit the user and select **User License** to Salesforce, then enable **Service Cloud User**.



- c. Save the changes.

#### Step 4: Enable Screen Pop in Configuration Manager

1. Log in to Configuration Manager and enable Salesforce integration.
2. Go to **Integration > Screen Pop** tab.
3. Enable Screen Pop.
4. Select <Salesforce> for the Target Type.

5. Select <Enhanced> for Integration type.

The screenshot shows the 'Integration » Screen Pop' configuration page in the AcmeJets administration interface. The page is titled 'Integration » Screen Pop' and has tabs for 'CRM API', 'CRM Triggers', 'Screen Pop', and 'API Token'. The 'Screen Pop' tab is active. The main content area is titled 'Enable Screen Pop' and contains several sections: 'Target Attributes' with radio buttons for 'Target' (NetSuite, Salesforce, Zendesk, Microsoft, Zoho, custom) and 'type' (Local); 'Integration Type' set to 'Enhanced'; 'Accounts' with the value 'TSTDRV647852'; 'Service Name', 'Login URL', and 'Branding URL' fields; 'URL' set to '/MashUp/MashUp.html'; 'Enable Customization' checkbox; 'Script URL' set to 'AcmeJets'; 'Use Remote Login' checkbox; 'API Tokens' set to '\*\*\*\*'; 'Use client login session to pop' checkbox; and 'Launch native login window at agent login' checkbox. Below this is an 'Agents (7/8)' section with a checkbox 'Select and assign all agents (choose agents)'. A red arrow points to the 'Integration' menu item in the left sidebar, and another red arrow points to the 'Select and assign all agents' checkbox.

6. Select agents to provide access to Salesforce integration.
7. Select media for auto log from Phone, Voicemail, and Chat. You can disable auto log for a specific medium by disabling it.
8. Select the mode for screen pop of auto log from the available choices.
9. Define events that trigger screen pop for each interaction from the following choices:
  - When agent is offered interaction
  - When agent accepts interaction
  - When agent completes interaction
10. For Window Properties of the Screen Pop, define the desired settings. This allows agents to define the size of the screen pop window and also set window properties.

8x8, Inc. AcmeJets Help

Integration » Screen Pop

CRM API CRM Triggers Screen Pop API Token

**Trigger an Auto Log Window after interactions**

For these media:

Phone  Voice Mail  Chat

Type of log window:

No Screen pop  
 Pop the log for edit  
 Pop the log for view

**Trigger A PopUp Window**

For these events:

When agent is offered transaction  
 When agent accepts transaction  
 When agent completes transaction

For these media:

Phone  Voice Mail  Chat  Email

**Window Properties**

Open new window for screenpop  
 Use single window only  
 Hide result listing if only one search result is found

Show toolbars:  yes  no

Size and position: width 748 height 700 top 0 left 265

Save Reset



**Note:** The properties for Screen Pop window are applicable to non-console mode users only.

11. For details on these settings, refer to the [Configuration Manager guide](#) for Virtual Contact Center.
12. Click **Save**.

### Step 5: Link Salesforce User Account with Virtual Contact Center Agent Account

For Salesforce users to log in to 8x8 Virtual Call Center, you must ensure agent accounts in Virtual Contact Center are configured using the same email ID as the corresponding Salesforce user login.

1. Log in to Configuration Manager.
2. Click **Agents**.
3. From the list, select the desired agent.
4. Double click to edit.

5. Make sure the email address matches login ID of the corresponding Salesforce user.

The screenshot shows the 'Agent » Edit Agent » General' configuration page for '(jsmith) John Smith'. The 'Email Address' field is highlighted with a red box and contains the value 'jsmith@acmejetz.com'. Other fields include First Name (John), Last Name (Smith), Username (jsmith), Password, and Repep Password. The page also features a 'Comment' text area and 'Save' and 'Cancel' buttons at the bottom.

6. Save your changes.

You have now completed the integration set up for 8x8 Virtual Contact Center.

## Step 6: Launch Virtual Contact Center

When first configuring VCC integration for Single Sign-on, the agent will need to give permission for the 8x8 app to interact with Salesforce. In order to give permission access to the 8x8 plugin, the agent will need to open the app from a Non-Console Salesforce page.

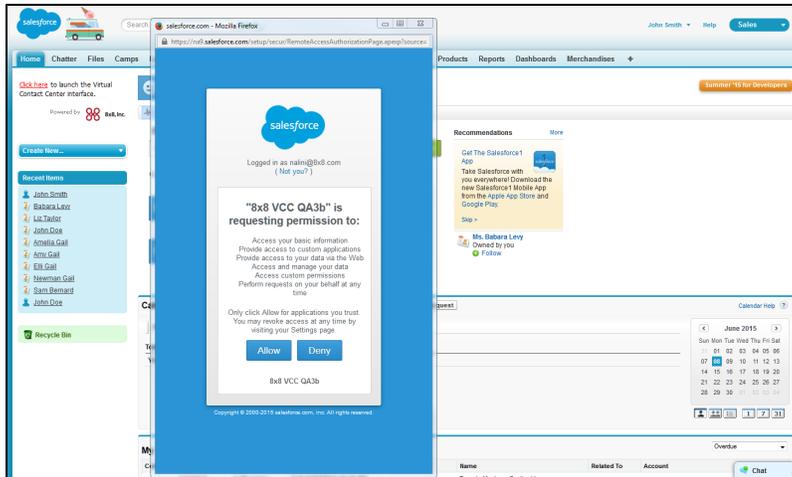
If you wish to launch the app manually, you can **disable the automatic login** setting in the Agent Profile. The app behavior varies based on your Salesforce log in mode.

- **If you are a Non-Console user**, the app launches in a stand alone browser window. The screen pop occurs in a new browser session or refreshes the same browser session based on the screen pop settings by your administrator.
- **If you are a Console user**, the app launches as a pop up window within the Salesforce login window. You can minimize it whenever needed.

### Log in as Non-Console User

1. Log in to Salesforce in Non-Console mode. If your administrator has set up the integration with 8x8 Virtual Contact Center, you should see the link to Virtual Contact Center on your home page dashboard.
2. Click the link to launch the app.

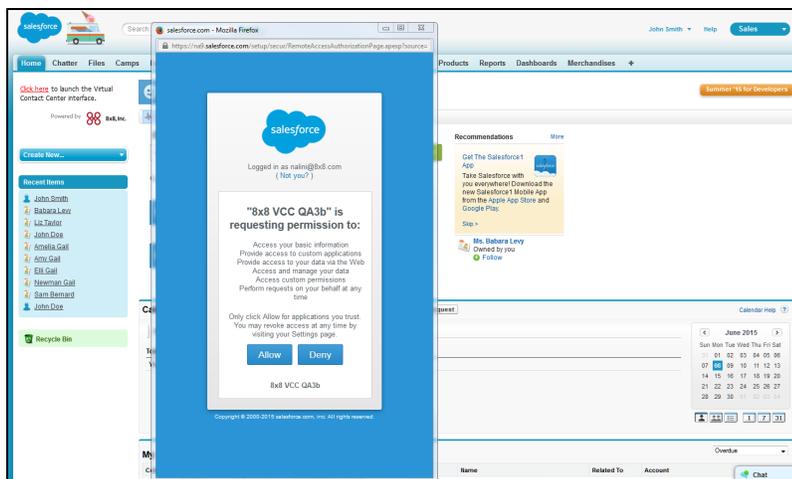
3. Accept the app permissions at the prompt.



4. The Virtual Contact Center app launches automatically in a separate browser window.
5. You are logged in *break* status. You are not offered any interactions in *break* status. For details on agent status, refer to [Agent Quick Start Guide](#).
6. Change your status to *Available* or *Working Offline*.  
You are now ready to process your customer interactions using the Virtual Contact Center app.

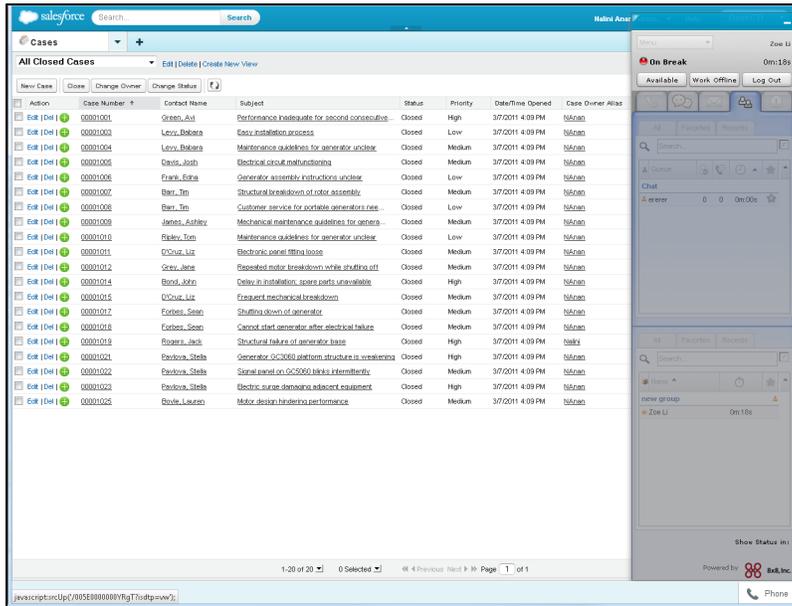
### Log in as Console User

1. Log in to Salesforce account in Console mode.
2. Switch to non console mode.
  - a. Click the link to launch the app.
  - b. Accept the app permissions at the prompt.



- c. The Virtual Contact Center app launches automatically in a separate browser window.

3. Switch back to Console mode.
4. In the footer, click the phone link to launch the app.



The screenshot displays the Salesforce console interface. The main area shows a list of 'All Closed Cases' with columns for Action, Case Number, Contact Name, Subject, Status, Priority, Date/Time Opened, and Case Owner Alias. The cases listed include various issues related to generator performance, maintenance, and assembly. On the right side, there is a chat window titled 'On Break' with a status of 'On Break' and a timer showing '0m:15s'. The chat window includes a search bar, a chat area with a message 'An error 0 0 0m:00s', and a 'Show Status in:' dropdown menu. At the bottom right, there is a 'Powered by' logo for '88 Inc.' and a 'Phone' icon.



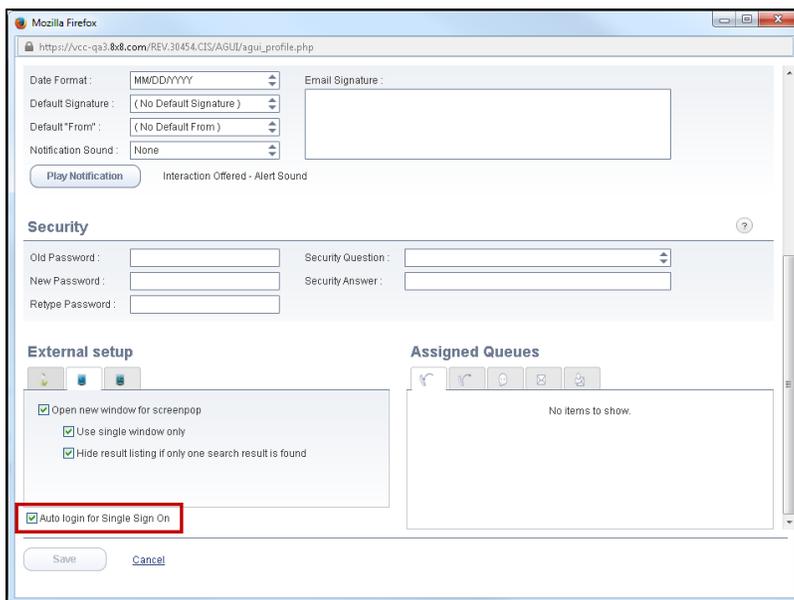
**Note:** The app is a pop up window embedded in your Salesforce login window. You can minimize the app by clicking the minimize button. The interface looks as shown here.

5. You are logged in *break* status. You are not offered any interactions in *break* status. For details on agent status, refer to [Agent Quick Start Guide](#).
6. Change your status to *Available* or *Working Offline*. You are now ready to process your customer interactions using the Virtual Contact Center app.

### To Disable Automatic Login

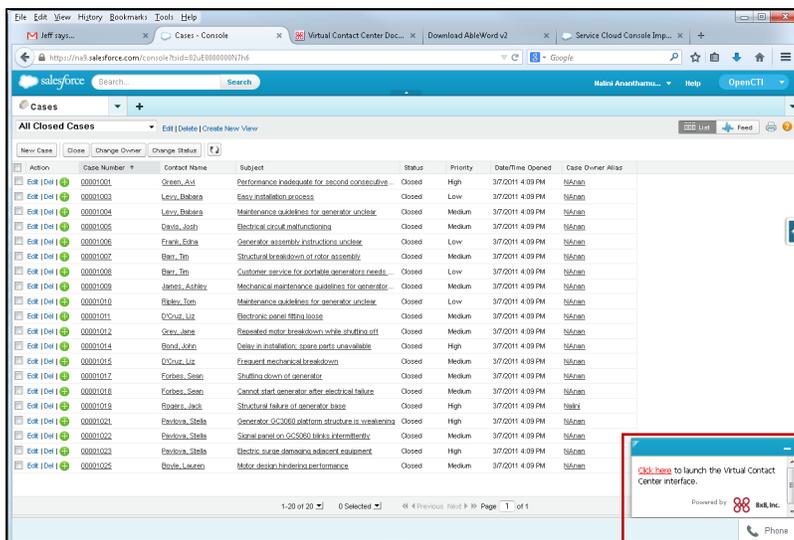
When you log into Salesforce, the app launches automatically by default. If you wish to launch it manually, you can disable the automatic login setting in the Agent Profile.

1. Select **Profile** from Window menu in the Control Panel.
2. In the External Set up, un-check the option **Auto Login for Single Sign on**.

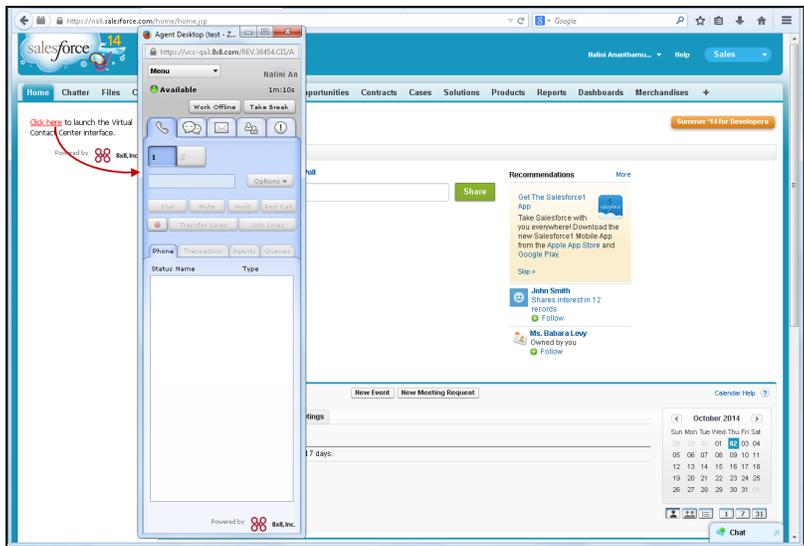


Disabling the auto-login requires you to initiate the app manually by clicking the link to log in to Virtual Contact Center

3. In Console mode, click the Phone tab in the footer bar to bring the up the box with the trigger link.



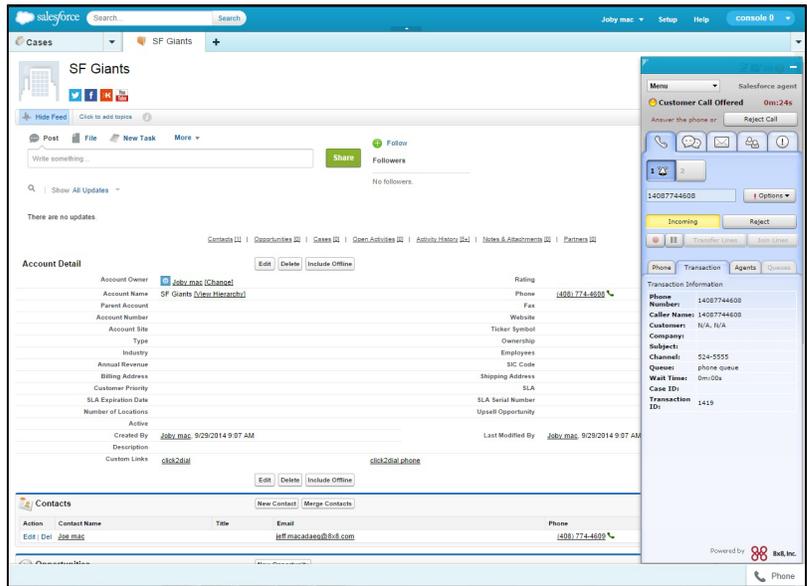
In non-console mode, click on the link to launch the app as shown below.



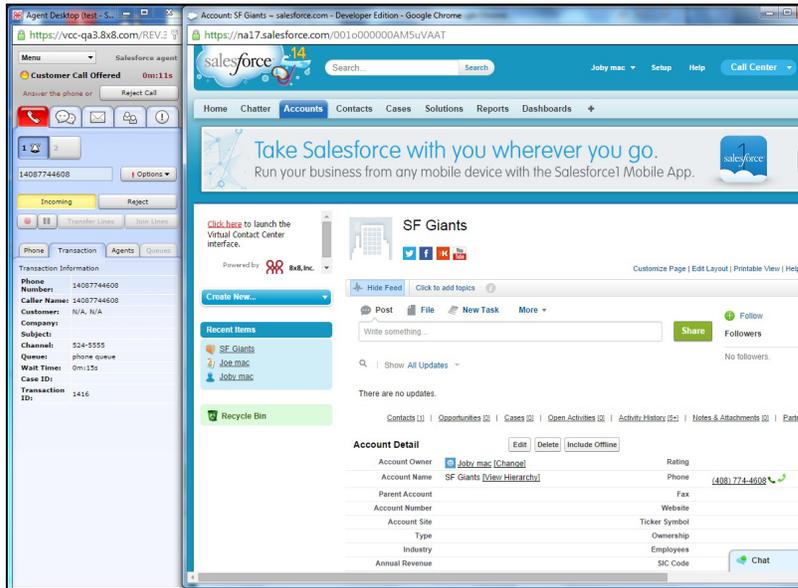
 **Note:** If you have multiple VCC agent accounts with same email addresses, the system looks up and links to the first agent found with the matching email address.

### Screen Pop Behavior in Service Console Mode Vs Non-Console Mode

In Service Console mode, the screen pop occurs in separate tabs within the dashboard. You can manage your interactions better in tabbed mode.



In Non-Console mode, the screen pop occurs in a separate browser session. Each new screen pop shows either on a new browser session or refreshes the same browser window.



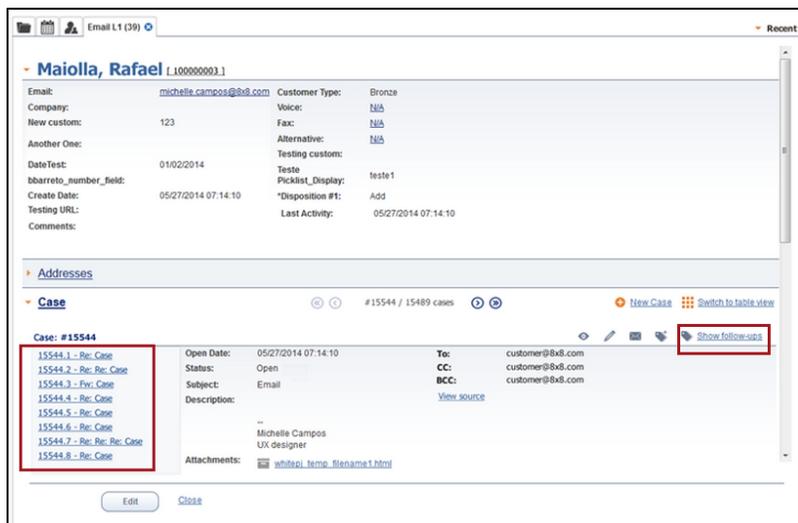
## Enhancements to Local CRM

We have introduced some changes to the Local CRM in Agent Console to enhance your experience.

### Ability to Access the List of Follow-up Records

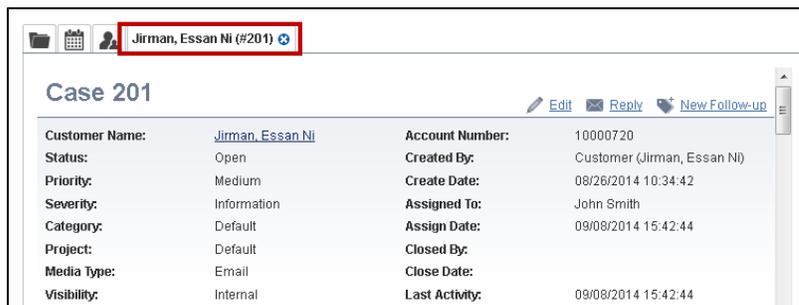
From a customer record, you can click the **switch to unitary view** and see the list of follow-up records for the case. This helps you find records quickly.

- View the list of follow-up records for the case
- Click a list item to view the details of each follow-up record
- Click **Show follow-ups** link to reply to a particular follow-up record



### Improved Navigation by Displaying Case ID

During an inbound email interaction from a customer, the screen pop tab that presents the email, displays the case number and customer name. If you have multiple emails opened in tabs, it helps you navigate better. Prior to this release, the tab showed the transaction ID.



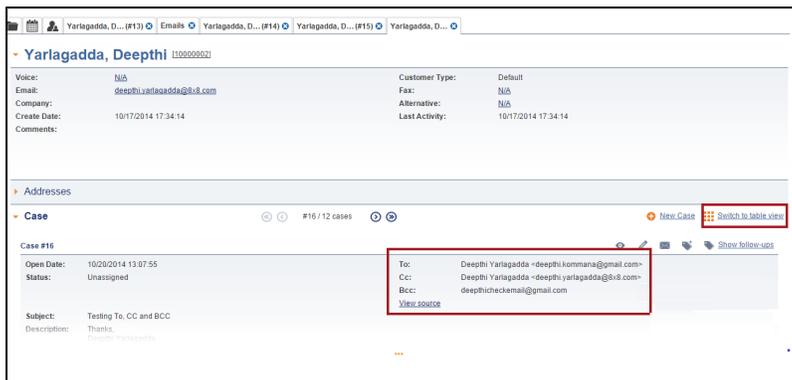
### Ability to View the Email Fields: To, Cc, Bcc, and View Source from the Customers tab

If a case is created as a result of an incoming email through the email channel, you are able to see **To**,

**CC**, **BCC**, and **View source** fields in the details. This enhancement enables the agent to know who is Cc'd or BCC'd on the email while still in the customers tab. Prior to this release, the agent had to click Reply button to find this information.

**To view the email fields and source of email:**

1. In the Agent Console go to **Customers** tab.
2. Select a customer and open **Case** to see the list of cases.
3. Highlight a case from the list and select **Switch to unitary view**. It opens the case details and shows **To**, **CC**, **BCC**, and **View source**.
4. Click **View source** to see the email protocol routing.



You can see one case at a time. Use the pagination tools to navigate to other cases.

5. Click **...** to see the entire content.

**Ability to Access the Case Attachments in a Central Location**

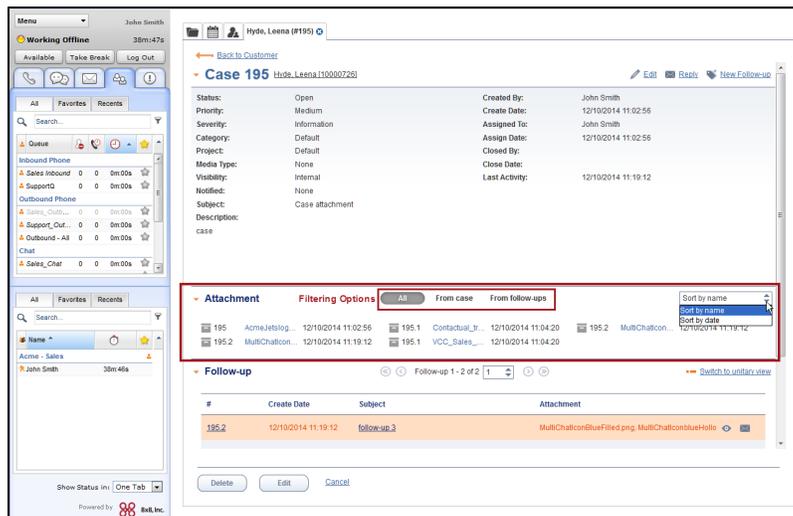
The agents can now view the attachments from the case or follow-up view. Prior to this release, each attachment associated with a case or a follow-up record could be accessed by opening the respective case. With this enhancement, the Attachment tab provides a consolidated access to all attachments related to a case and follow-ups belonging to the case.

**Benefits:**

- Ability to sort attachments by name or by date.
- Ability to filter attachments by case or follow-up records.

**To view the attachments:**

1. In the Agent Console go to **Cases** tab and open a case.
2. Open the **Attachment** .



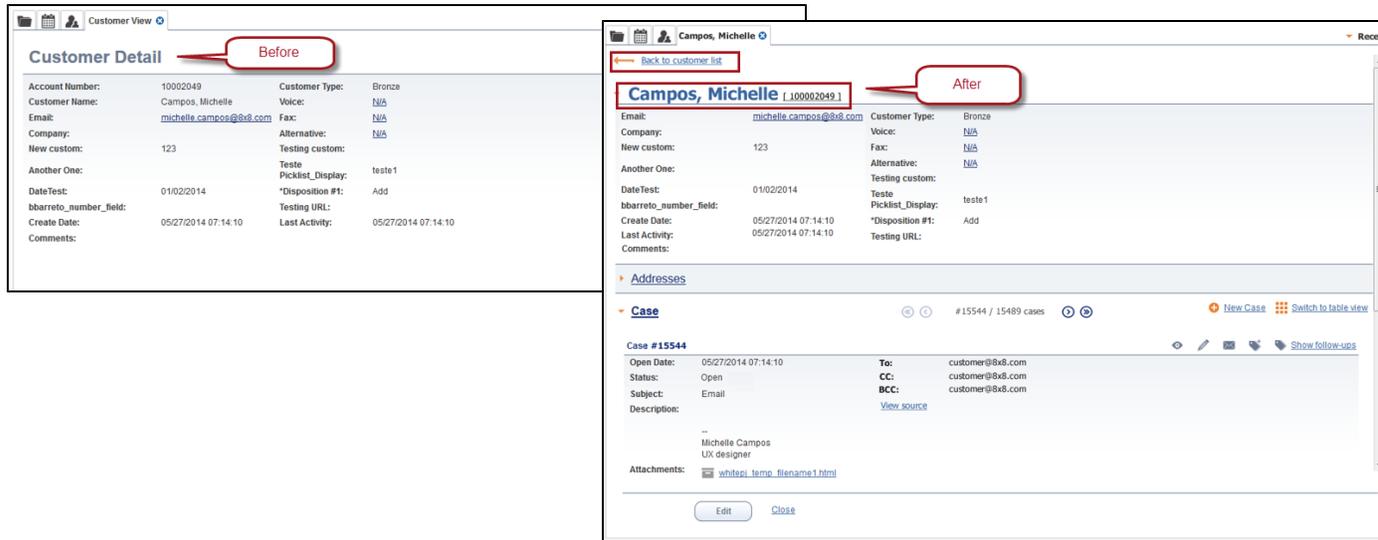
- Click **From Case** to view only attachments associated with a case.
  - Click **From Follow-ups** to view only attachments associated with all follow-up records for the case.
  - Click **All** to view all attachments associated with the case including the follow-up records.
3. Click the desired attachment to download the file.

### The Customer Name and Account Number Appear as a Link in the Title

The customer name and account number are moved from the details content to its title and appear as a link to open the customer view.

To view the customer name and account number, click on any customer record in the **Customers** tab.

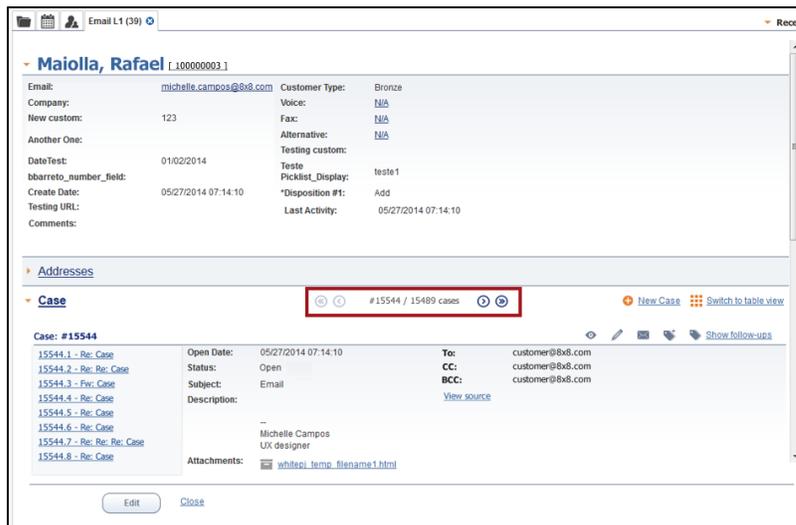
The customer last name, first name, and account number appear as a link in title. This enhancement also helps with the navigation back to the Customer's information page from the Case window. **Back to Customer** button is another way to navigate to the a customer's information page.



### Improved Case Pagination in Unitary View

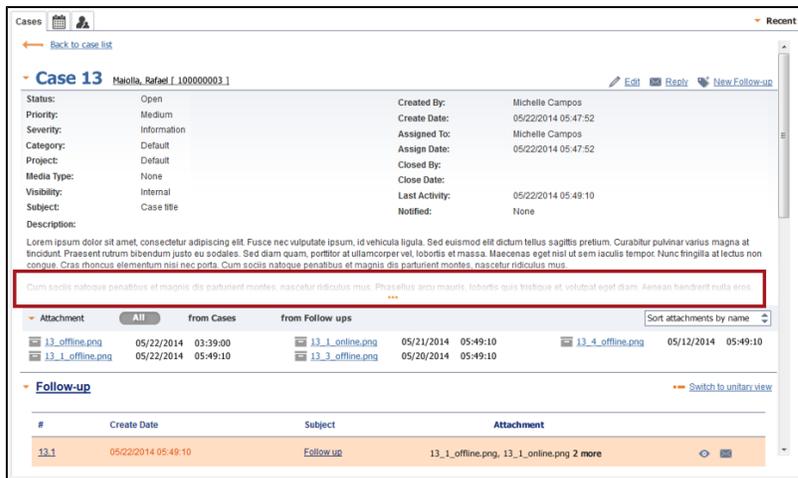
The unitary view pagination shows the case number/ total of cases.

To view the case number and total of cases, click on any customer record in the **Customer** tab. Select **Switch to unitary view**.



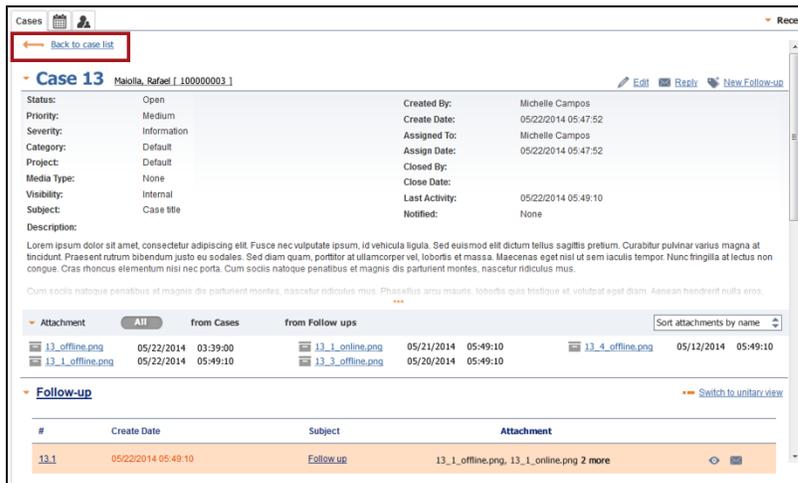
### Expandable Case View and Follow-Up View

The case view and follow-up view description and comment pane can be expanded. It avoids unnecessary blank spaces and content being pushed below the fold. Prior to this release, if a case or follow-up record had long description, you had to scroll down to view the content, with this enhancement, the description and comment panes appear truncated/hidden with an expandable link. Click **...** to expand.



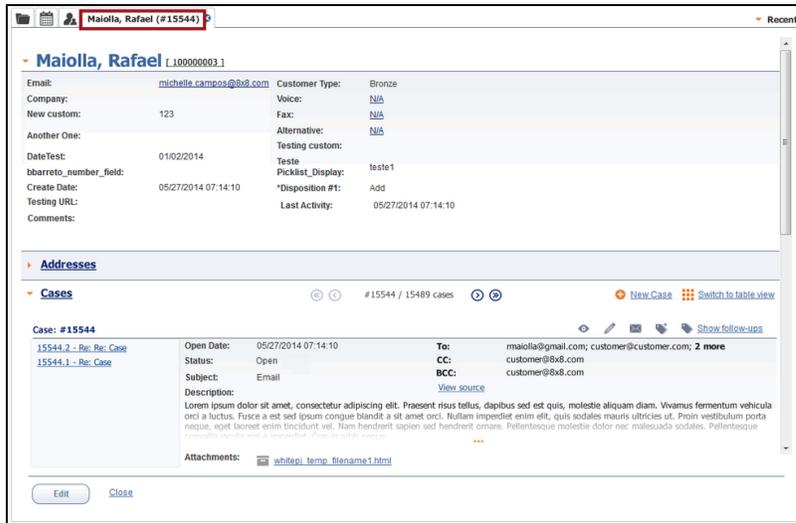
### Enhanced Navigation by Adding a Back Button to the Top of the Page

Adding a **Back to Customer** button to the top of the page in Customer, Case and Task tabs improves navigation among CRM records.



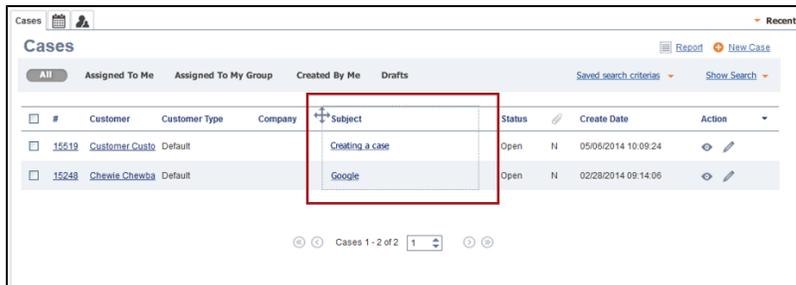
### Ability to View Case ID Instead of Transaction ID in the Email Tab

The screen pop tab header now displays the case ID instead of the Transaction ID that helps agents identify the cases quickly.



### The Ability to Change the Columns Order in Cases, Customers and Tasks Result Page

The users can configure the columns order in cases, customers and tasks result page to have them in desired order. To change the order, select and drag the column to the desired location.



### End of Support

Effective release 8.1, Virtual Contact Center ceases its support for IE8. If you are currently using IE8 to log into Configuration Manager or Agent Console, we advise you to upgrade to more recent versions of Internet Explorer.

### Browser Requirements:

- IE9, 10, 11
- Chrome and Firefox