Webex Contact Center 2.0 Workbook

Student Lab

2.0 Release

Document Version 13/01/22

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TABLE OF CONTENTS

i Document History – Change Control 3
ii Introduction..... 4
1 Lab 1 – Creating Users in CH..... 5
2 Lab 2 – Configuring Tenant Global Settings..... 21
3 Lab 3 – Provisioning Skills, Skill Profiles and MM Profiles..... 24
4 Lab 4 – Provisioning Sites and Teams 32
5 Lab 5 – Provisioning Auxiliary Codes, Agent Profiles and Configuring Agents and Creating a Supervisor. 38
6 Lab 6 – Provisioning Entry Points and Queues and adding Resources 52
7 Lab 7 – Provisioning a Flow..... 61
8 Lab 8 – Entry Point and Queue Routing Strategies, DN to EP Mapping 74
9 Lab 9 – Queues and Routing Design Solution..... 79
10 Lab 10 – Setting up a Call Monitoring Schedule and a Call Recording Schedule..... 80
11 Lab 11 – Agent Desktop Client..... 86
12 Lab 12 – Configuring Virtual Agent..... 96
13 Lab 13 – Configuring Email Routing 112
14 Lab 14 – Configuring Chat.....125
15 Lab 15 – Analyzer.....143
16 Lab 16 – Analyzer Standard Reports.....151

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i Document History – Change Control

Date	Description	Editor
12/4/2020	New workbook compliant with 2.0 procedures and features	AN, NF, VM
12/17/2020	Updated during the course to correct minor issues	AN
02/04/2021	Updated Custom Virtual Agent procedure	VM
03/11/2021	Chat Template update, Virtual Agent Dialogflow key update	AN, VM
03/23/2021	Update for SBR	AN
06/10/2021	Removed FB Lab due to EOL	AN
08/03/2021	Updates for Chat Template, and few images.	VM
13/01/2022	User creation and management updates	VM

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ii Introduction

This workbook is designed to introduce you to the functions and capabilities of Webex Contact Center.

Technote: It would be good to have a printed copy of this exercise guide

ii.1 Exercises

- This workbook contains **16** exercises for you to complete.
- Exercises are performed by using a web browser that has public access to the Internet.
- The **Control Hub URL** for these exercises is:

  https://admin.webex.com

- The **Agent Client URL** for these exercises is:

  https://desktop.wxcc-us1.cisco.com

- The **Chat Test Website URL** for these exercises is:

The Parameter in yellow will vary according to the Chat bubble configured in the new exercises.

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1 Lab 1 – Creating Users in CH

Purpose: Creating Users in Control Hub and assigning them the corresponding License.

Expected Completion Time: 30 minutes.

Pre-requisite: each student should possess a Gmail email account or 6 different email addresses.

You should create 6 Agents in Control Hub. As CH needs to have a unique email address for each user (agent), we need 6 different email addresses.

One way to accomplish this task is to use the "Gmail dot trick".

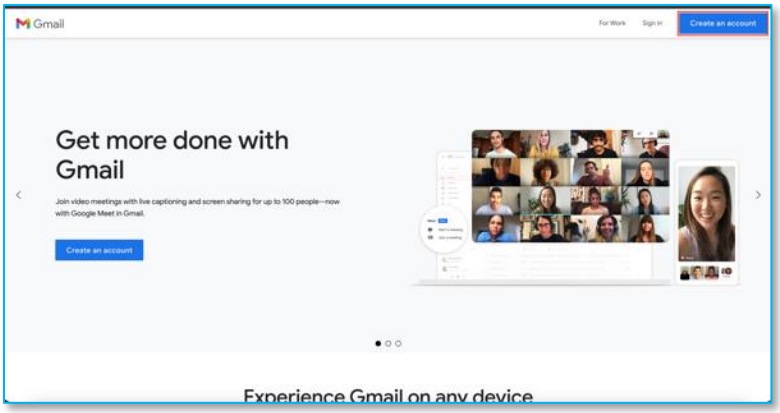
Tip! Using the Gmail dot trick is as easy as adding a dot anywhere in a Gmail address before the @ sign while registering at a website. Such as g.tricks@gmail.com, gtrick.s@gmail.com, or g.t.r.i.c.k.s@gmail.com. All the emails sent to these addresses will actually go to gtricks@gmail.com.

Firstly we will create the primary email address.

1.11 ☐ Open your browser and go to

URL: https://www.google.com/gmail/about/#

1.12 ☐ Click on Create account



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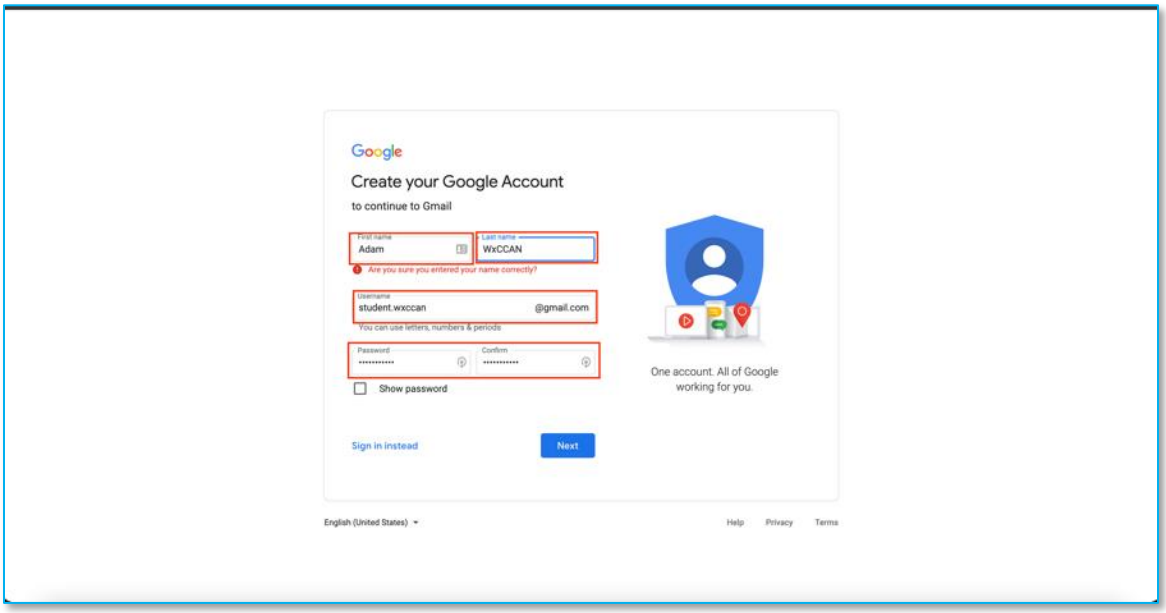
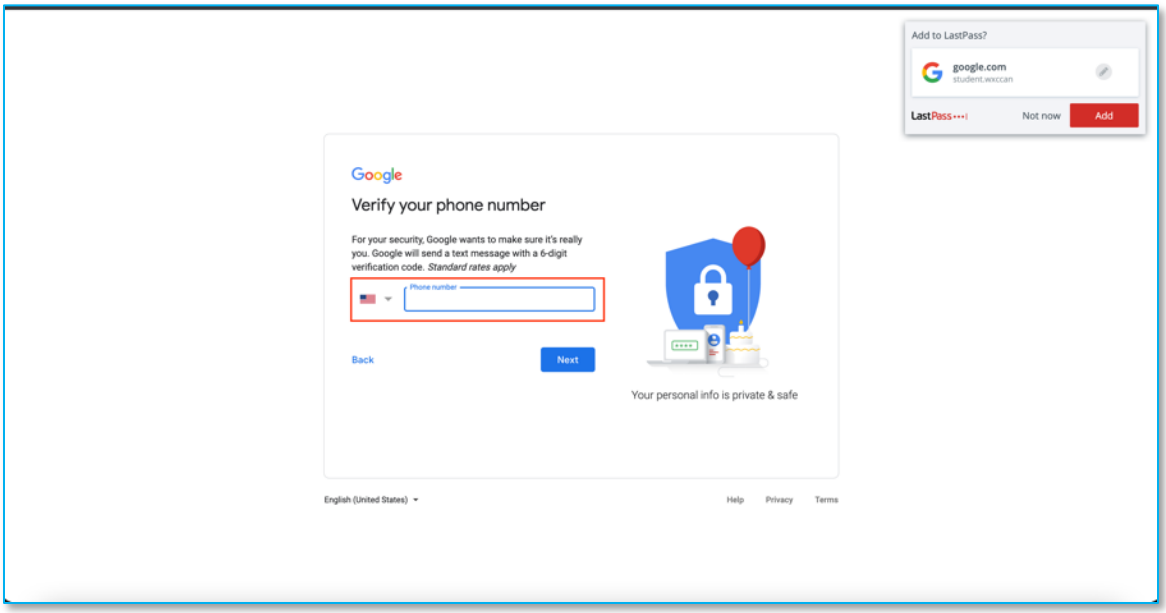
1.13 ☐ Enter in your first Name, WxCC(Your Intials) as a last name, and enter your student password, then hit next.



1.14 ☐ Enter in your phone number, then hit next.



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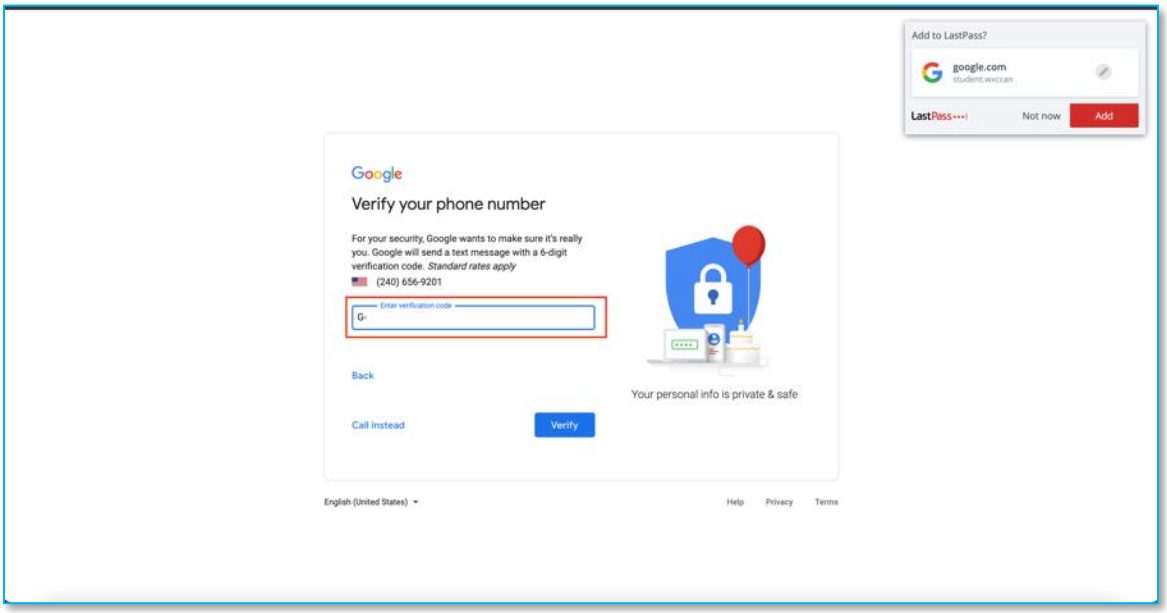
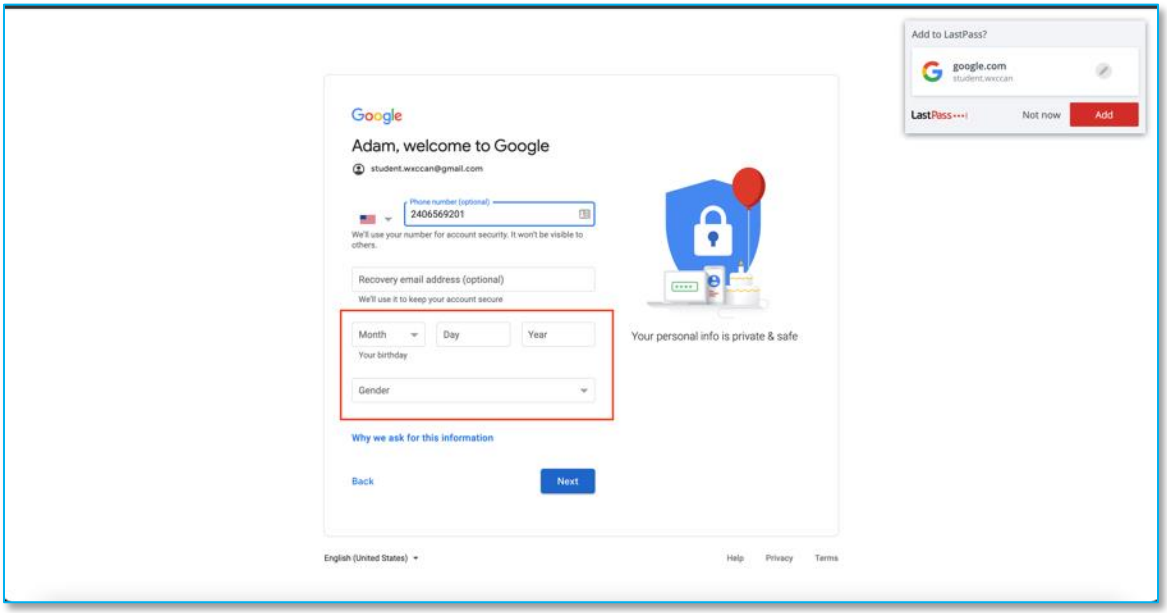
1.15 ☐ Enter in your phone number, then press verify.



1.16 ☐ Enter basic details, then press next.



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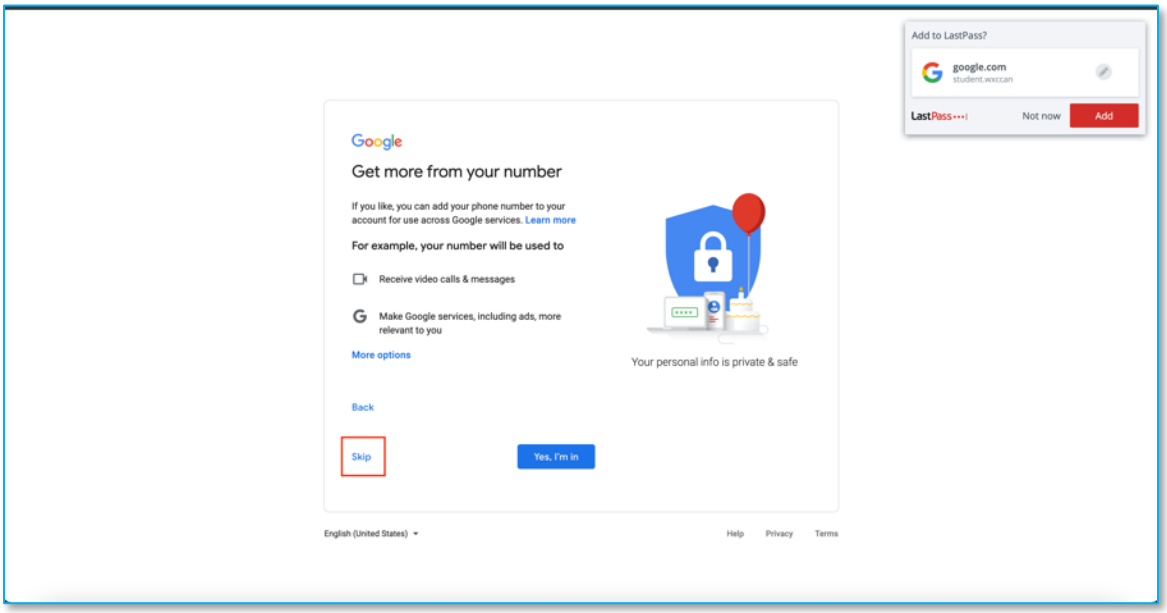
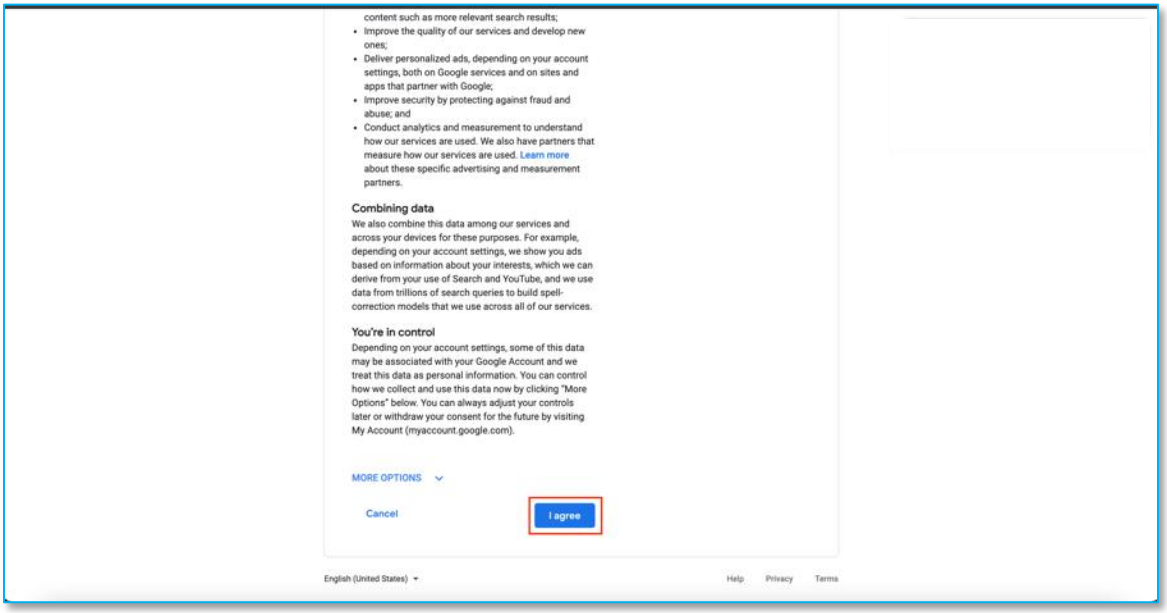
1.17 ☐ Press Skip.



1.18 ☐ Press "I Agree".



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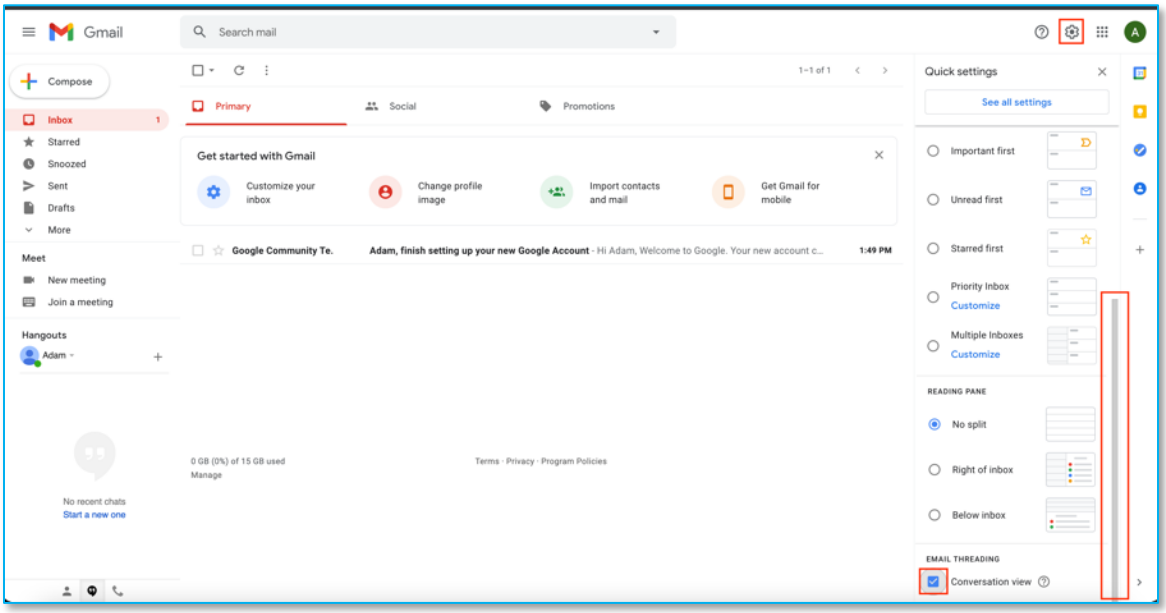
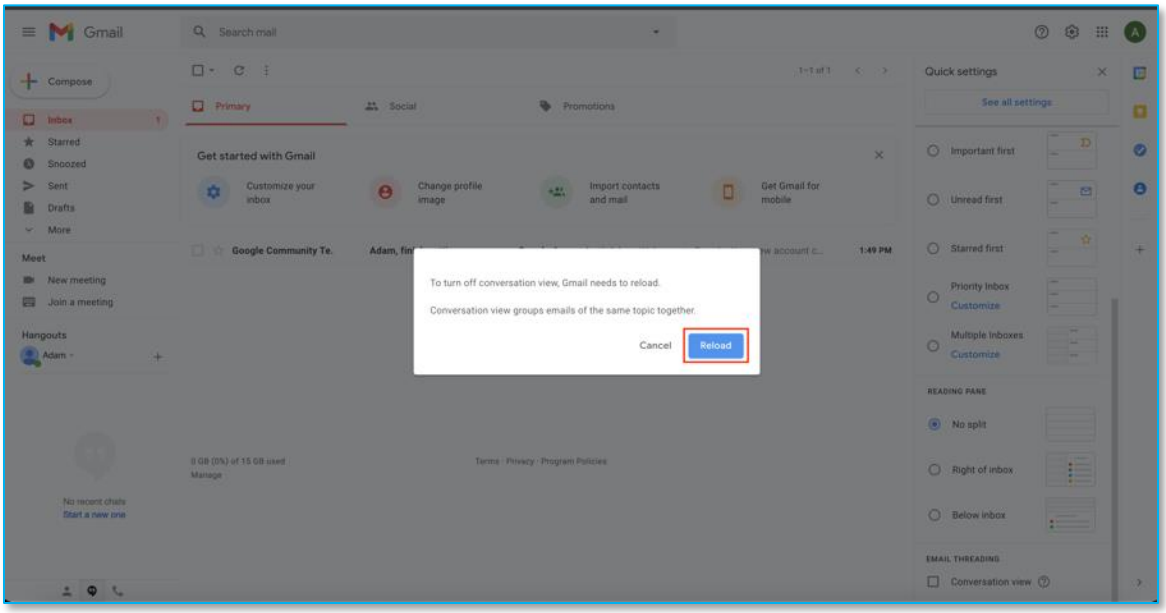
1.19 ☐ Press the cog icon, scroll down to the bottom of the slide out and deselect the conversation view.



1.20 ☐ Press "Reload".



Now we can use an online tool to give us the relevant email addresses we can use with it.

1.21 ☐ Open your browser and go to

URL: https://thebot.net/api/gmail/

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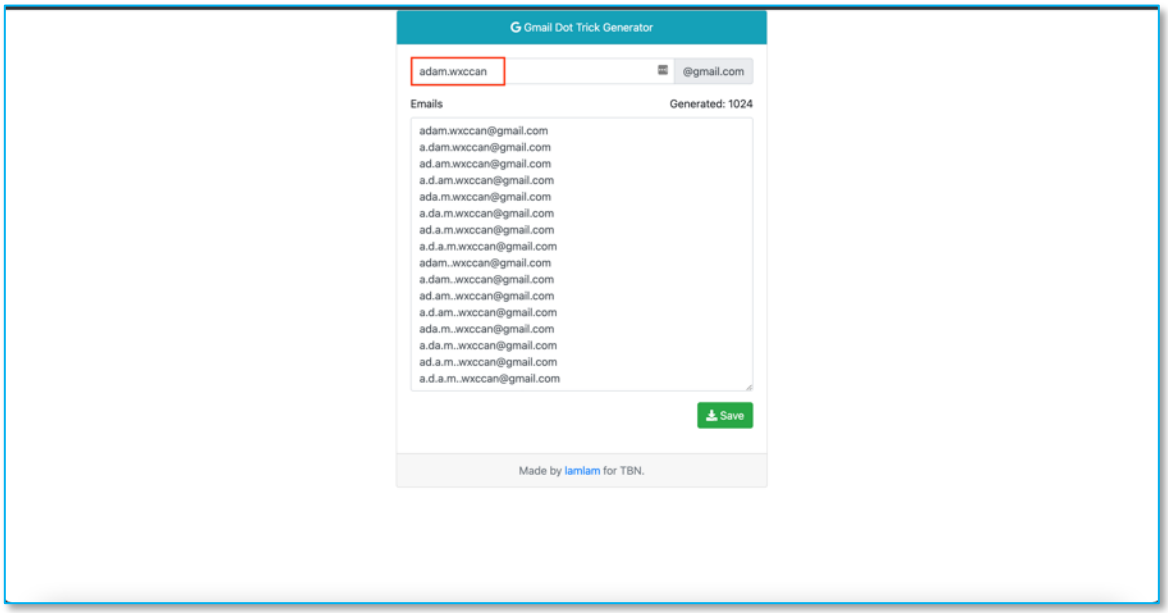
1.22 ☐ Enter in the first part of your "new" gmail address



1.23 ☐ Save the file

You now have a saved text file of email addresses that can be used to create new users. Any emails send to one of the new email addresses will arrive in the original email box created at the beginning.

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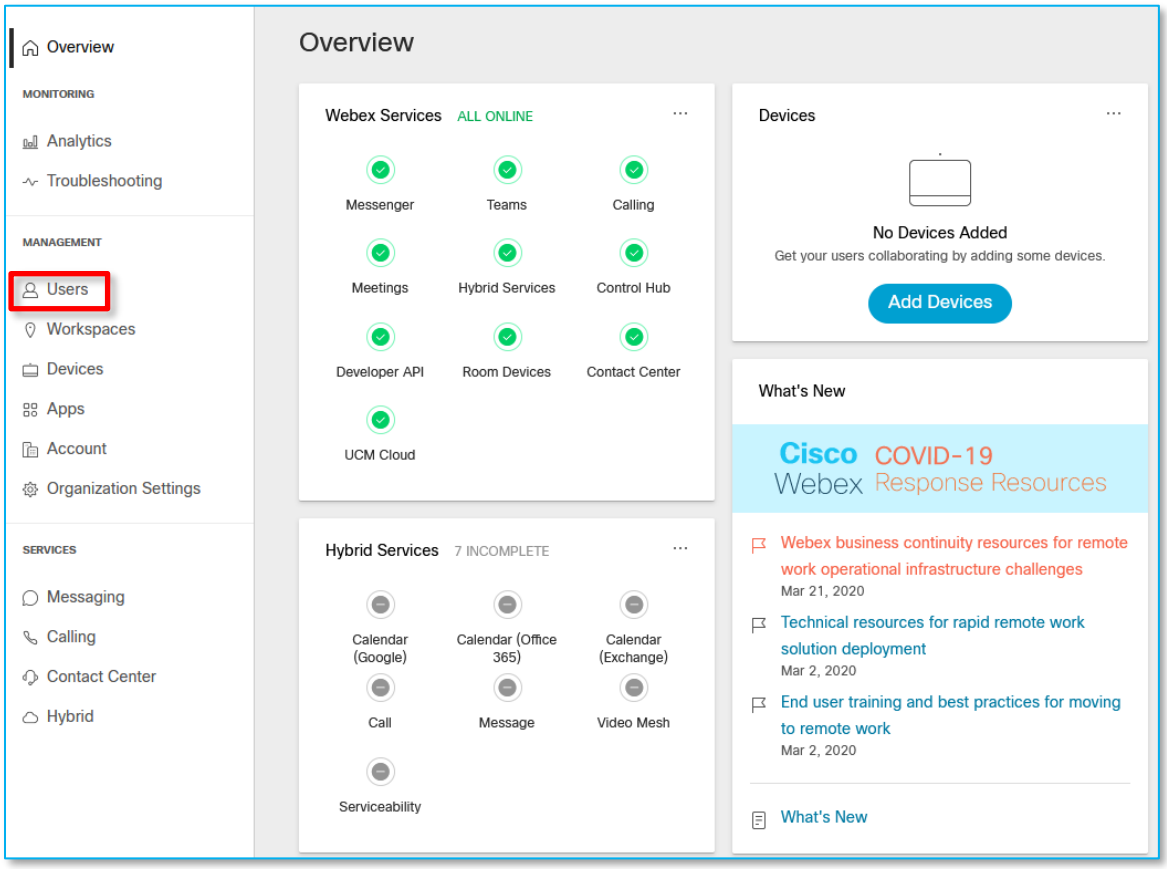
Creating multiple users in a Customer Tenant

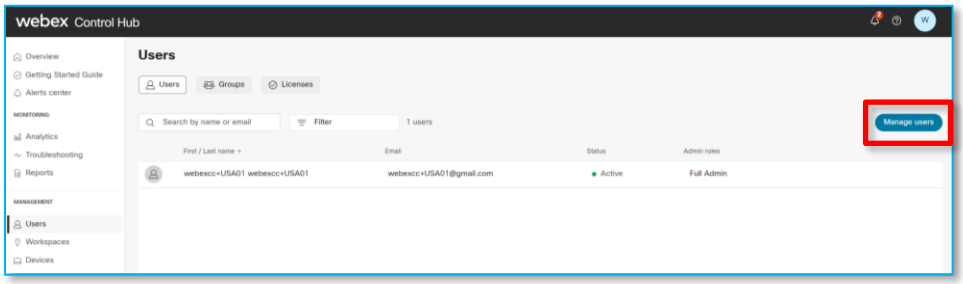
1.24 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

1.25 ☐ From the Overview screen, *click* on "Users"



1.26 ☐ Then *click on* "Manage Users".



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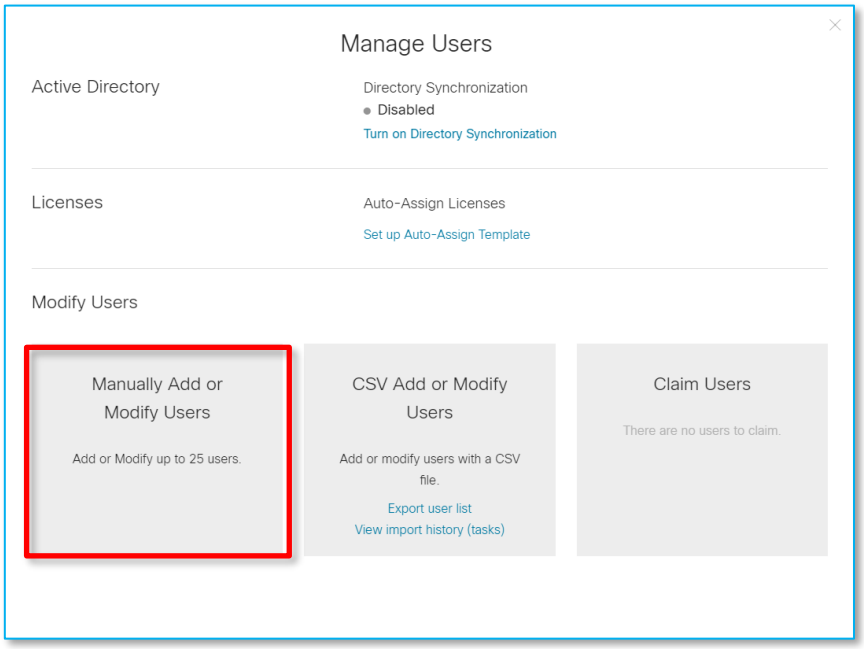
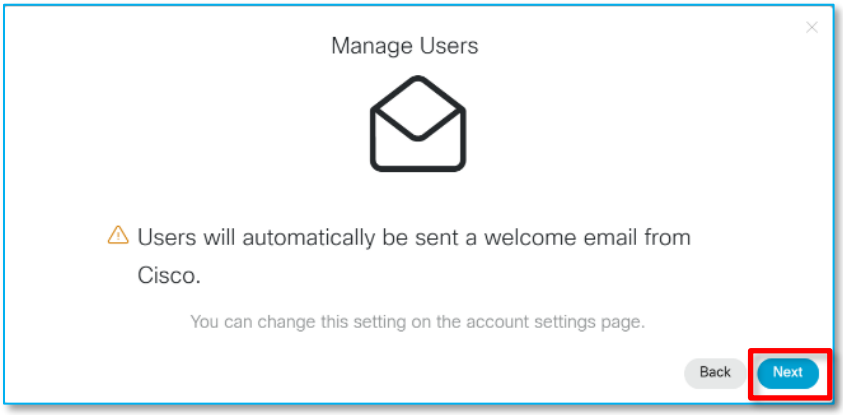
1.27 ☐ ***Click*** **"Manually Add or Modify Users"**



1.28 ☐ ***Click*** **"Next"**



1.29 ☐ **Choose "Email address".** ***Type*** **in "*your*" email details, when finished** ***click*** **"Next".**

Tip! *Your email address needs to be reachable from class and it needs to be unique. You should use your main Gmail address (without extra dots this time). Example: johnsmith@gmail.com*

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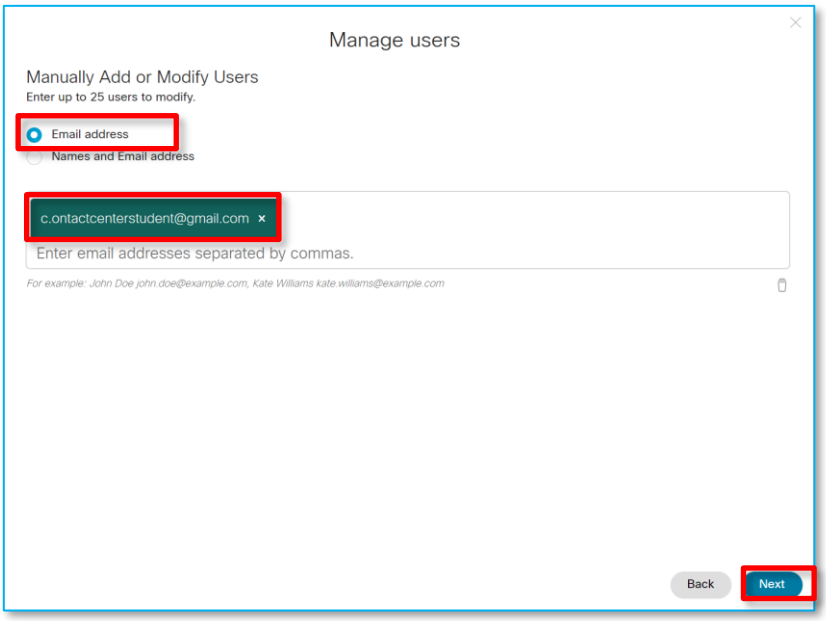
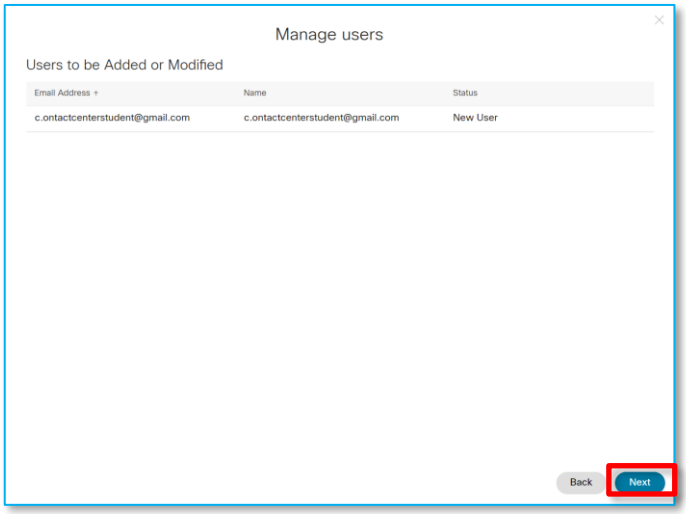


1.30 ☐ ***Confirm*** **that it is a New User by** ***clicking*** **"Next".**



1.31 ☐ ***Select*** **the User Service Entitlements as show below, then,** ***click*** **"Next".**

Tip! *Webex Teams and Webex CC are always mandatory.*

Webex Calling is necessary only if Users will also be Webex Calling Users.

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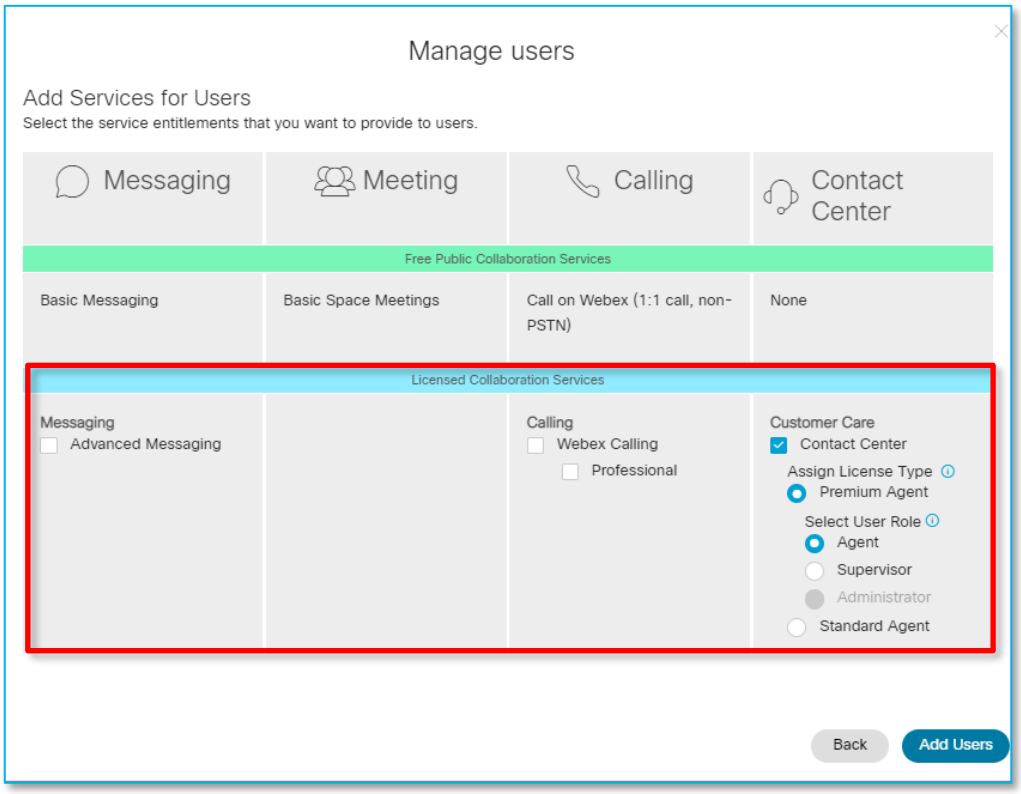
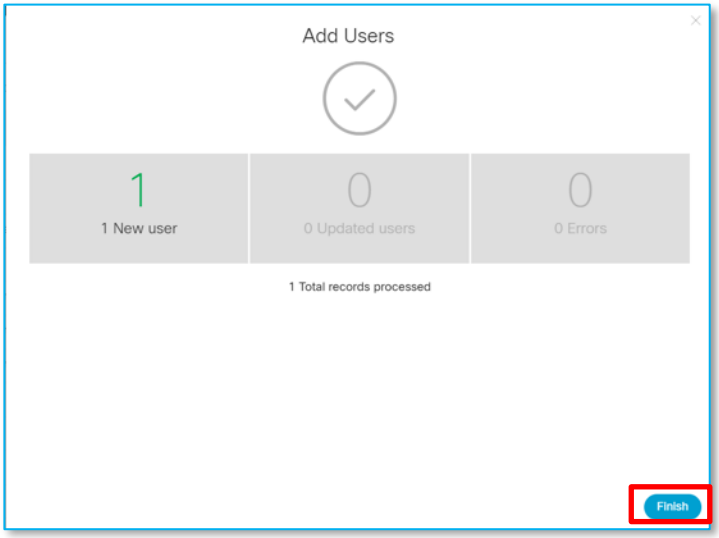


Tip! *The Webex Calling location "Office" was already created during the First Time Setup Wizard*

1.32 ☐ *Click* "Finish".



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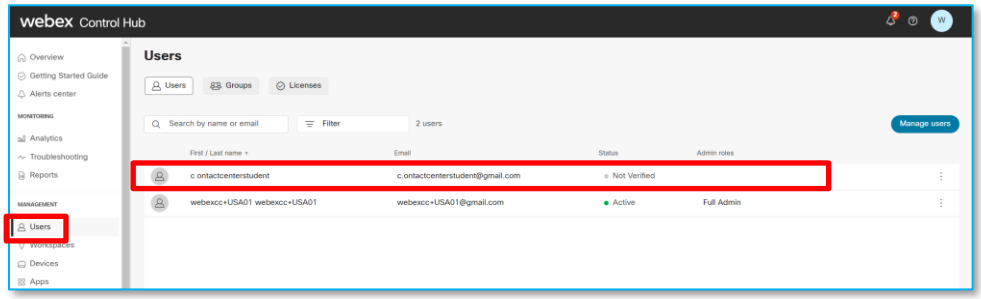
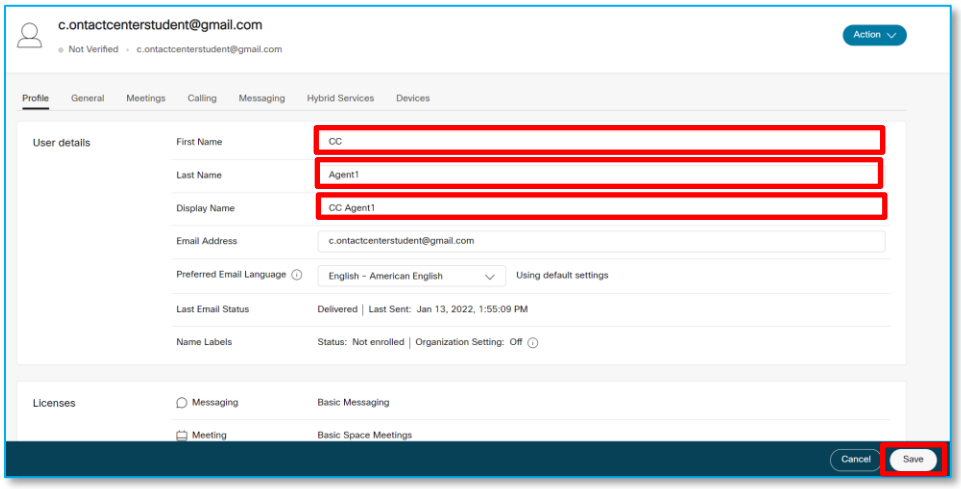
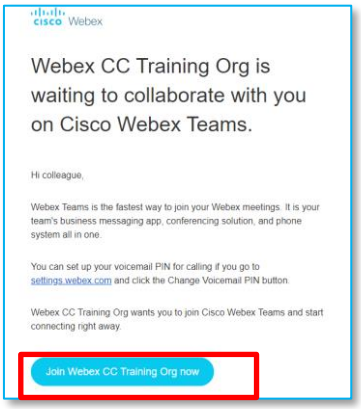
1.33 ☐ Click the user one time. You can edit the display name, first name and last name for the user.



1.34 ☐ Edit the user as follows: "CC Agent 1" should be the first Agent Display Name and then close the slide-out menu by clicking on "X".



1.35 ☐ Please open your Gmail email mailbox used to configure the first User. You should be able to find an activation email to set the user password. *Right-Click* on the blue button and open the link in *private* or *incognito* mode.



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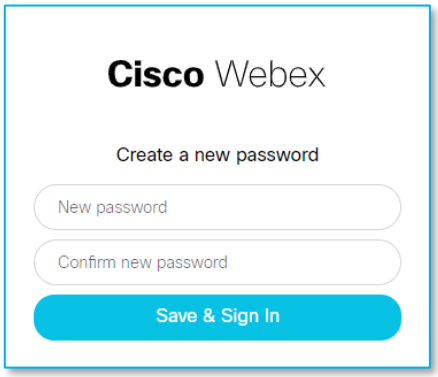
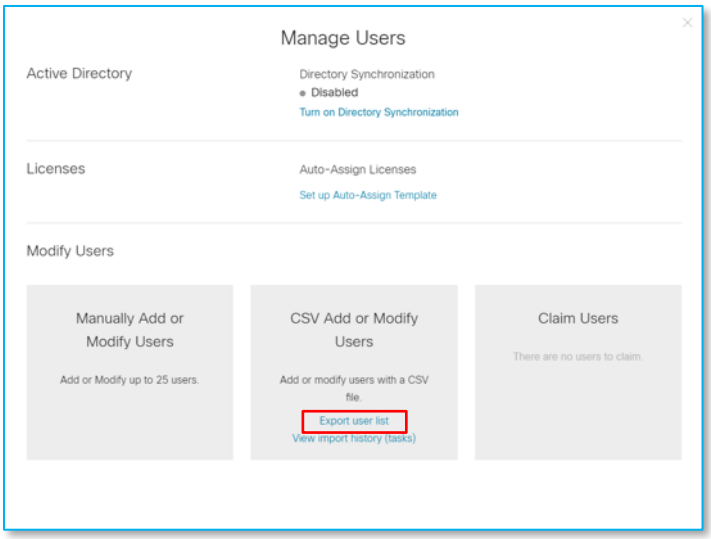
1.36 ☐ Set the password and close the browser incognito/private window.



Tip! *This process will activate the User in CH.*

1.37 ☐ Now we have one user created, with first, last name and all the services needed. We will then use this user as a template to generate 5 more. *Click* on "Manage Users".

1.38 ☐ On the "CSV Add or Modify Users". Click on "Export user list" in order to download the current list of users, which includes the one you just created, and the administrator. Click on the Export button.



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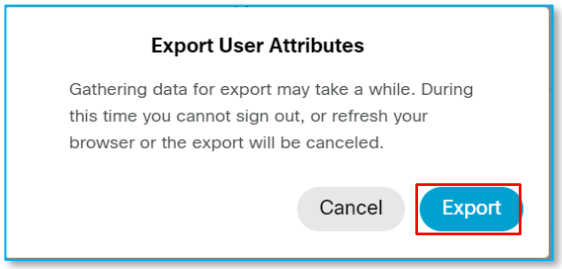
Note: This exported_users is a csv file.



1.39 ☐ Open the downloaded file *exported_users.csv* in excel or in a text editor such as Visual Studio Code, notepad++ or sublime:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	First Name	Last Name	Display Name	User ID/Email (Required)	User Statu	Last Servic	Days since	Directory I	Direct Line	Hybrid Cal	Hybrid Call	Hybrid Me	Jabber wit	Jabber Cal	UC Ma
2			asenav1+studentxadmin@gmail.com	asenav1+studentxadmin@gmail.com	Not Verified								FALSE	FALSE	
3	Carlos	Rodriguez	asenav1+user1test@gmail.com	asenav1+user1test@gmail.com	Not Verified			3001	2.14E+09				FALSE	FALSE	
4															
5															
6															

Delete the row corresponding to the Tenant Admin User (e.g. webexcc+studentXX@gmail.com).

Copy the row that has the manually created user in it, 4 times.

After that, edit the 5 rows with the information provided below.

Once done, save the file to your PC.

First Name	Last Name	Display Name	User ID / Email
CC	Agent 2	CC Agent 2	(see **"Gmail dot trick"** **Tip** to generate different addresses)
CC	Agent 3	CC Agent 3	(see **"Gmail dot trick"** **Tip** to generate different addresses)
CC	Agent 4	CC Agent 4	(see **"Gmail dot trick"** **Tip** to generate different addresses)
CC	Agent 5	CC Agent 5	(see **"Gmail dot trick"** **Tip** to generate different addresses)
CC	Agent 6	CC Agent 6	(see **"Gmail dot trick"** **Tip** to generate different addresses)

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In the end you only need to have 5 rows, under Header row, just the 5 new users.

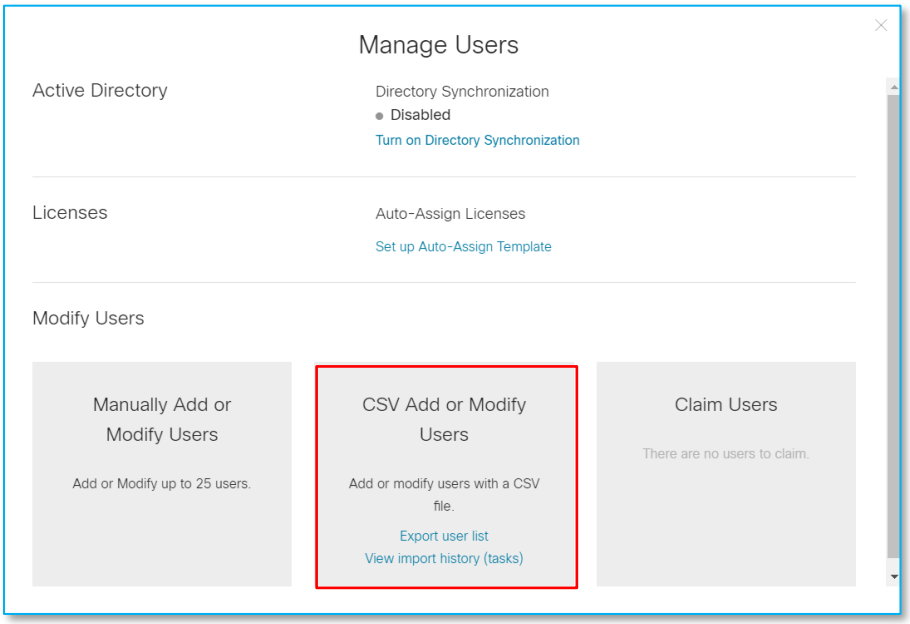
In order to avoid errors, copy the row of first user you manually created 4 times, and edit it with info contained in the table above.

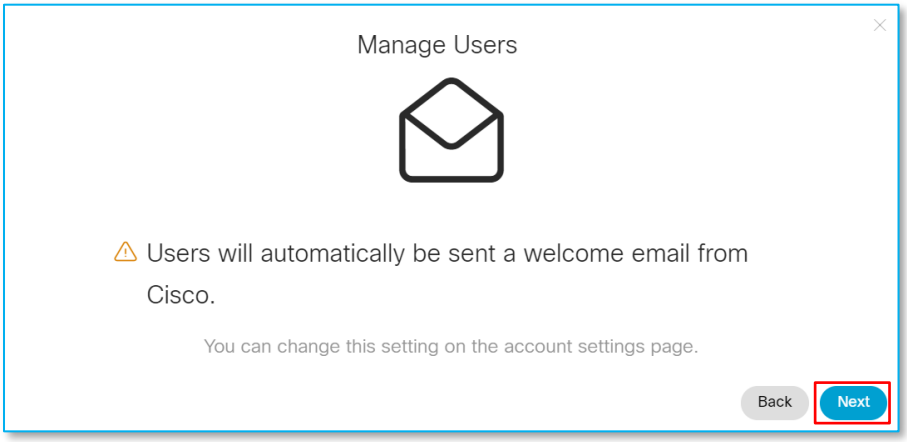
Leave the rest of the fields the same.

Tip! *Their email address should be reachable from class and it needs to be unique, please make sure you will use the Gmail dot trick explained before.*

1.40 ☐ Save your file.

1.41 ☐ Navigate back to Manage Users, click on CSV Add or Modify Users and then Next.





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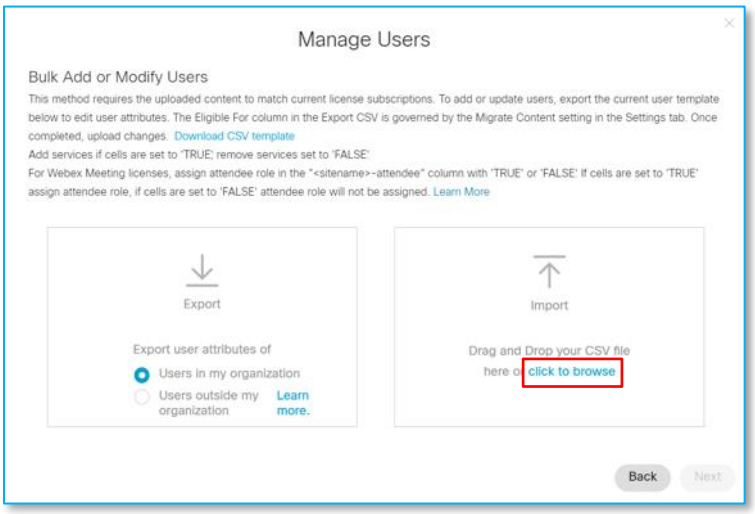
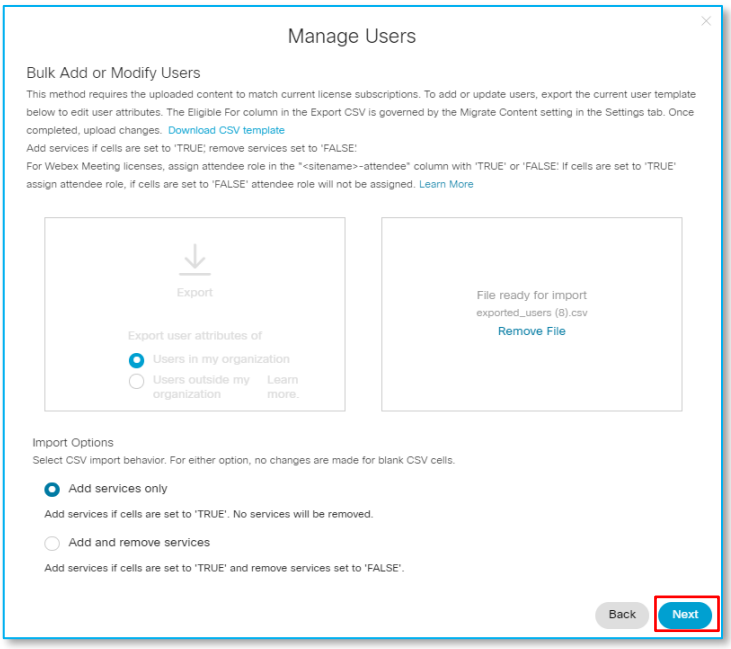
1.42 ☐ On Import click on “click to browse“ and upload your csv file.



1.43 ☐ Then click on “Next”.



Tip! If your .csv import fails, CH will inform you of the details allowing for a quick-fix!

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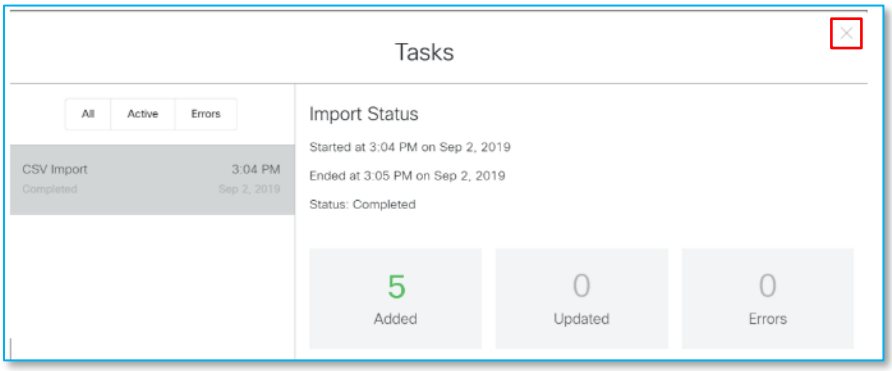
1.44 ☐ **When your import successfully, *Click* on the "X" to exit Managed Users.**



1.45 ☐ **You should now activate these 5 new users by clicking on their activation links and opening them in incognito mode, as you did for the first CC Agent.**

STOP! ***Please do not proceed until instructed to do so.***

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2 Lab 2 – Configuring Tenant Global Settings

Purpose: Checking and Configuring Tenant Global Settings.

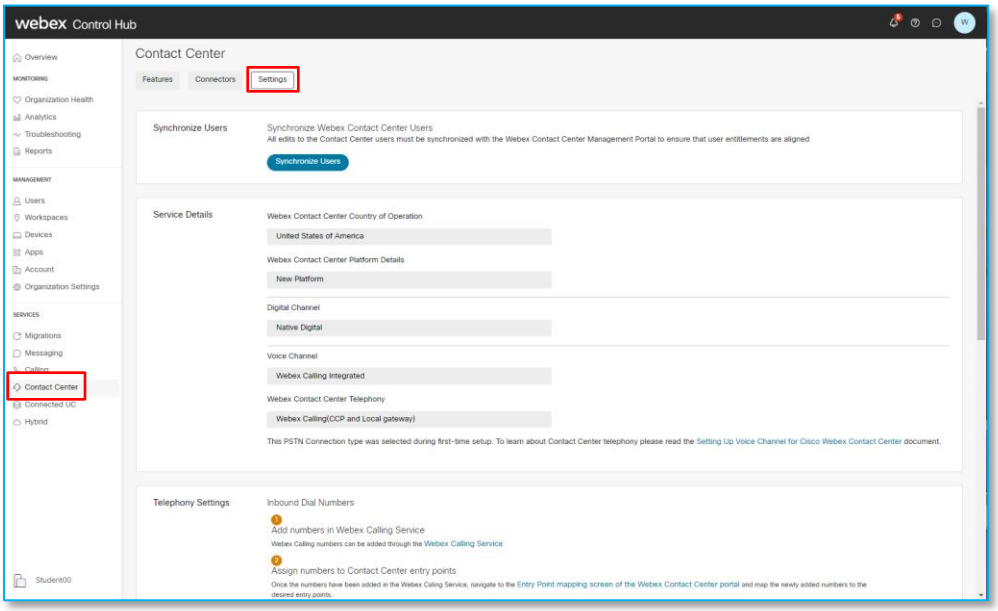
Expected Completion Time: 10 minutes.

Provisioning a Tenant under the main Service Provider

2.1 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

2.2 ☐ Once logged in, click "Contact Center" (under Services), then "Settings", as indicated in the following picture.



2.3 ☐ Click the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.

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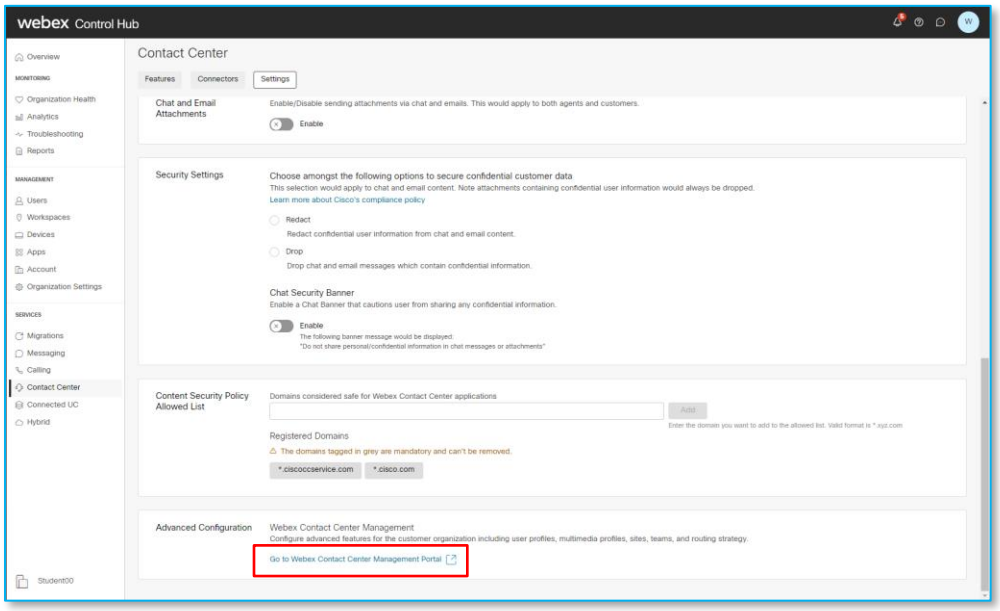
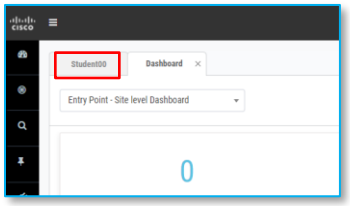
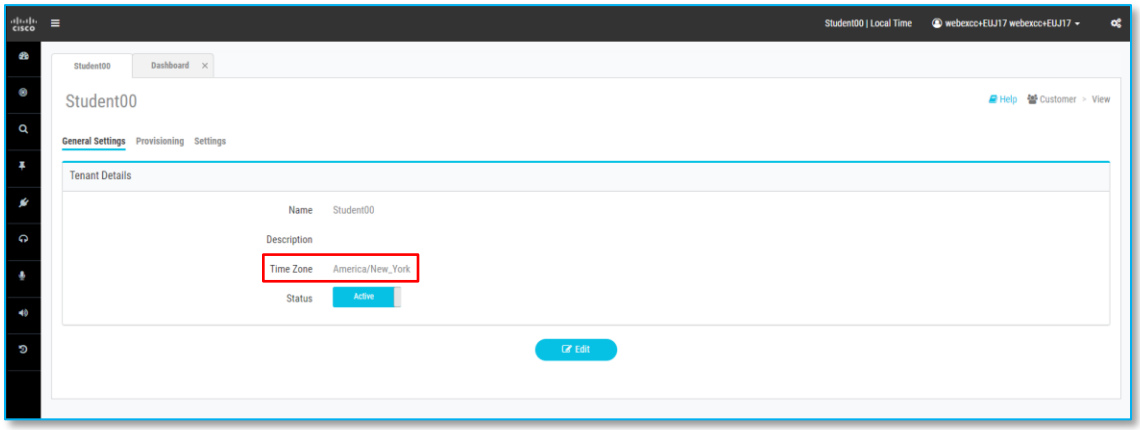


2.4 ☐ A new browser tab will be opened in your browser. Click on the first tab of the Tenant Portal, the one next to Dashboard.



2.5 ☐ In the "General Settings" make sure that the Tenant Time Zone is set as "America/New_York"



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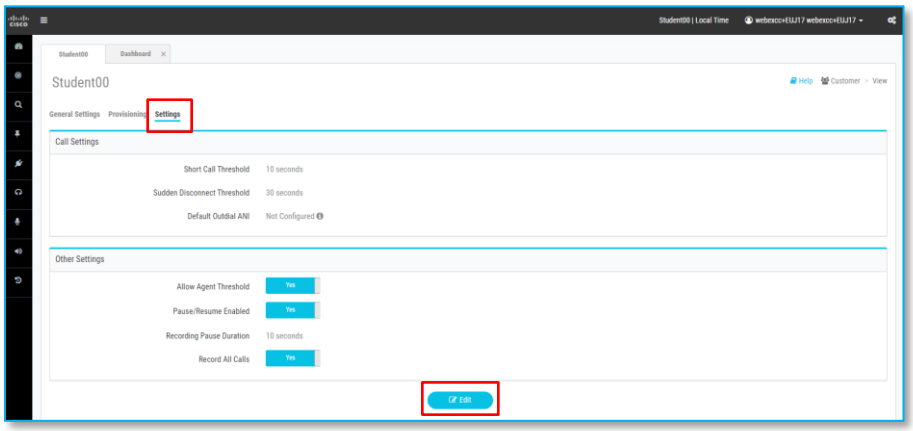
2.6 ☐ **Click the "Settings" tab and then click on "Edit" at the bottom of the page.**



2.7 ☐ **Change the Record Pause Duration to 60 seconds.**

2.8 ☐ **Click on "Save".**

STOP! ***Please do not proceed until instructed to do so.***

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3 Lab 3 – Provisioning Skills, Skill Profiles and MM Profiles

Purpose: Provisioning MM Profiles, Sites and Teams

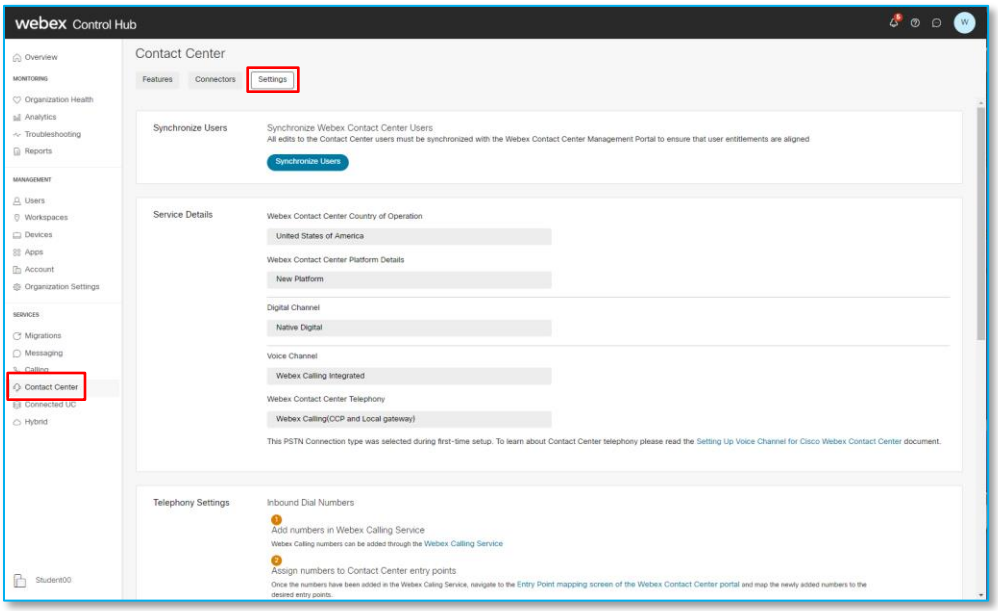
Expected Completion Time: 30 minutes.

Provisioning a Tenant under the main Service Provider

3.1 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

3.2 ☐ Once logged in, click "Contact Center" (under Services), then "Settings", as indicated in the following picture.



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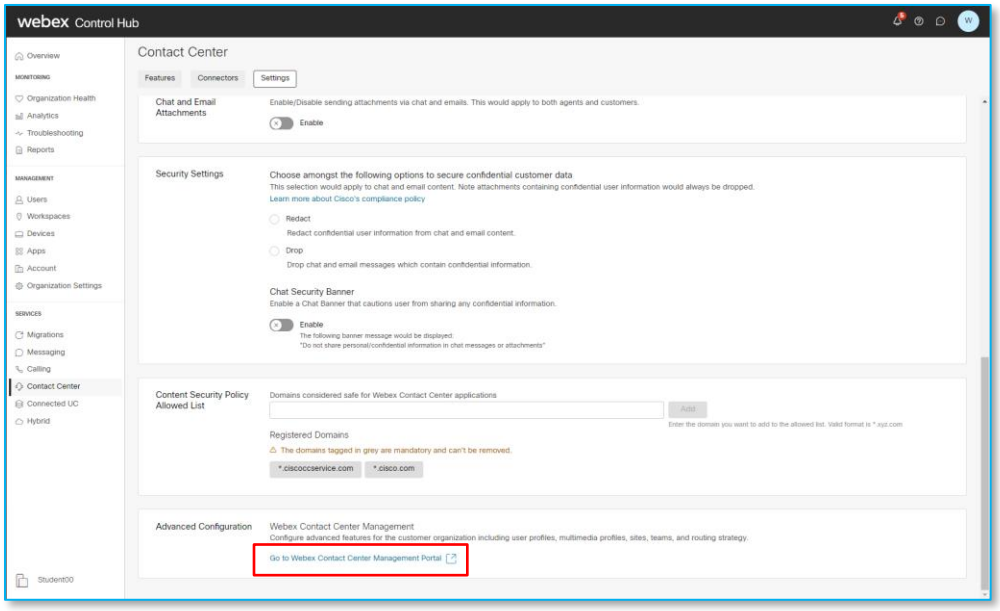
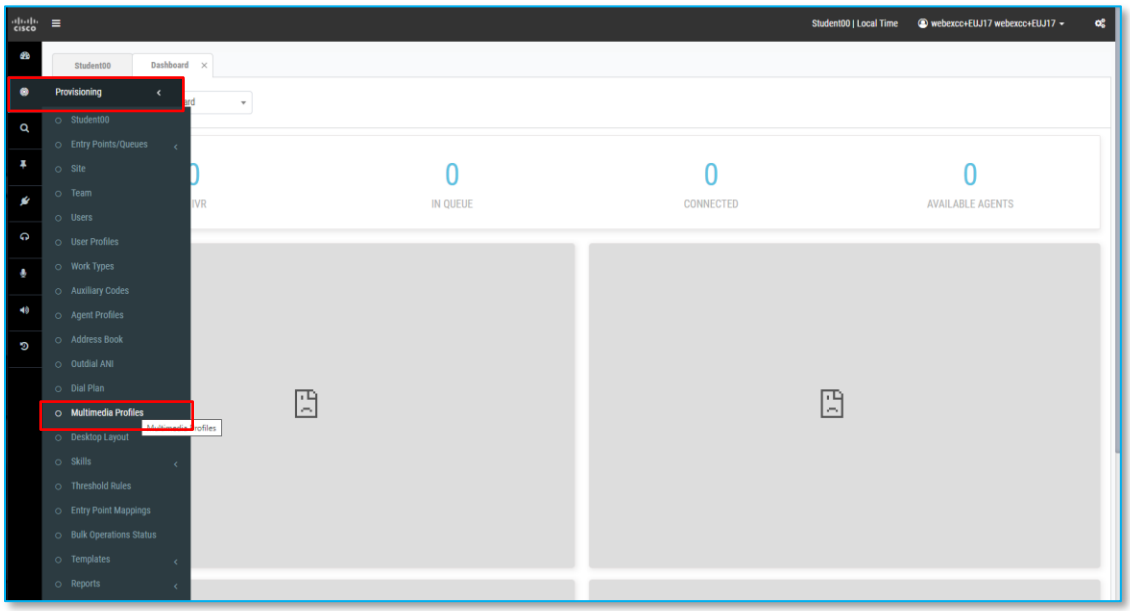
3.3 ☐ Click the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



3.4 ☐ Select the "Provisioning" icon and then select "Multimedia Profiles"



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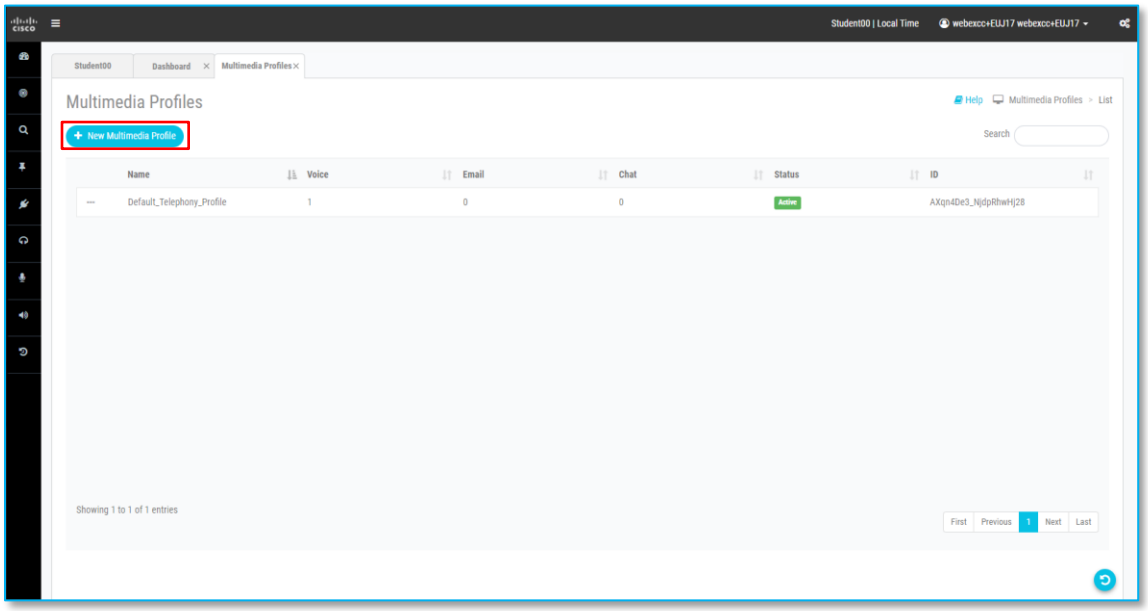
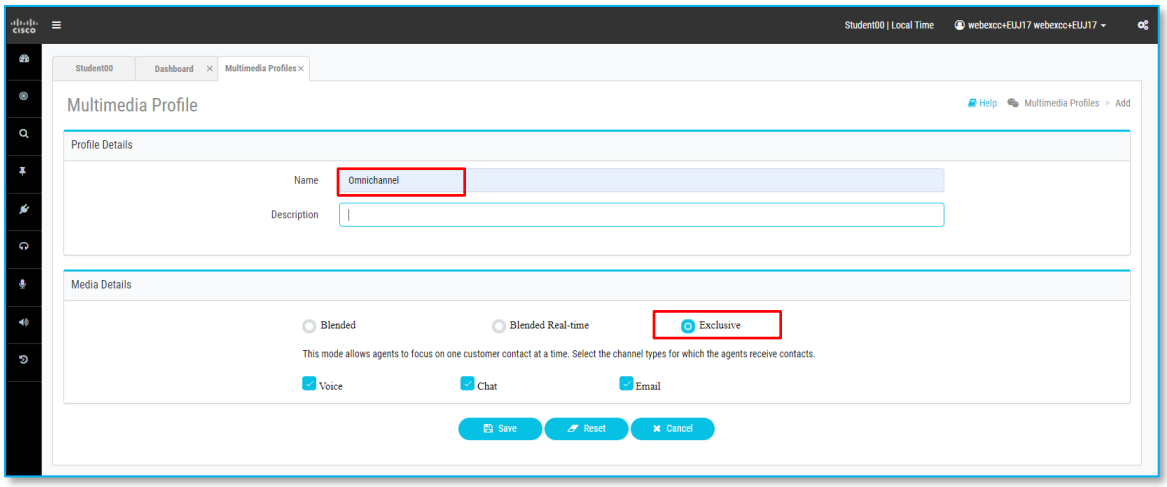
3.5 ☐ Click " + New multimedia Profile"



3.6 ☐ Fill in the information next to the red boxes, then click save.



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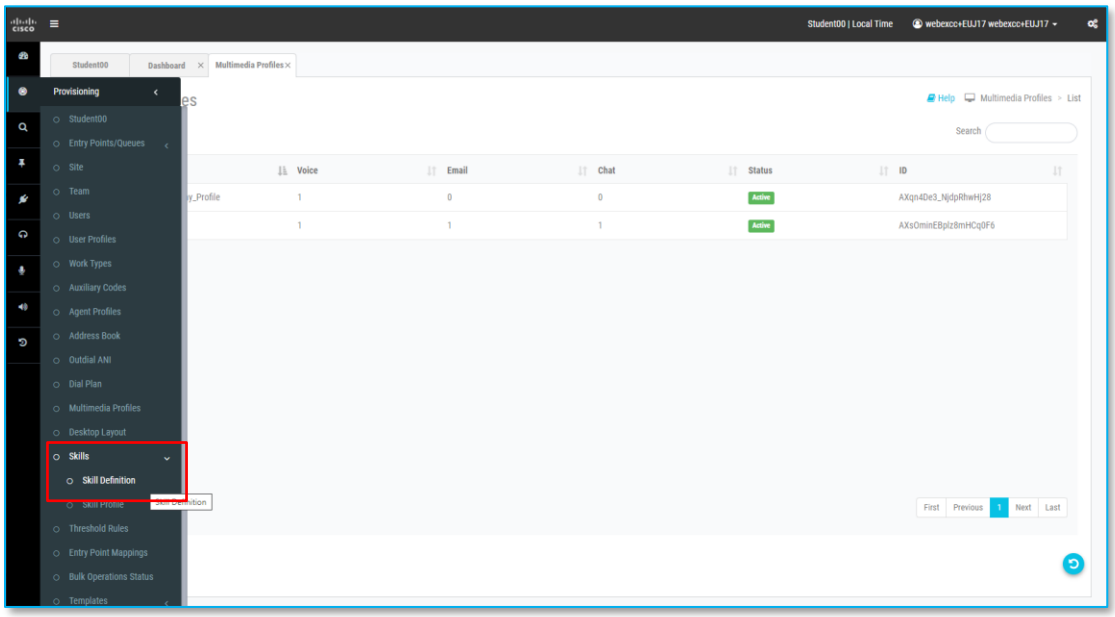
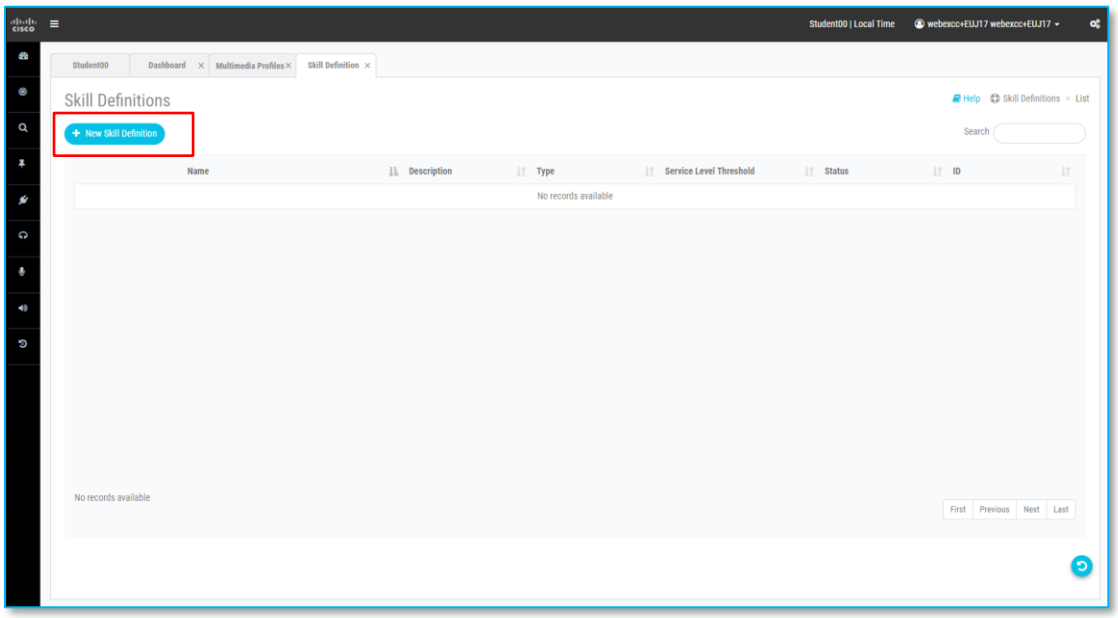
3.7 ☐ Select the "Provisioning" icon and then select "Skills" then "Skills Definition"



3.8 ☐ Click " + New Skill Definition"



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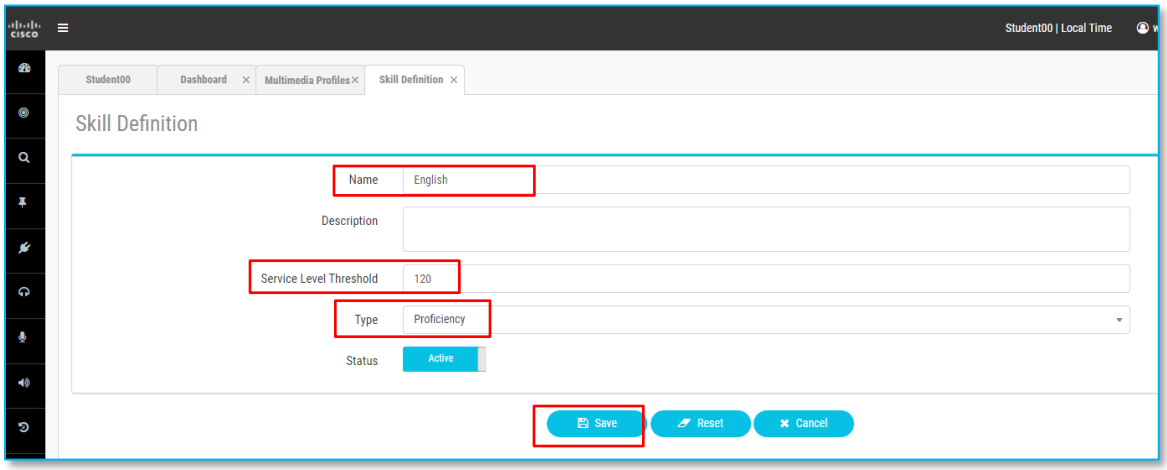
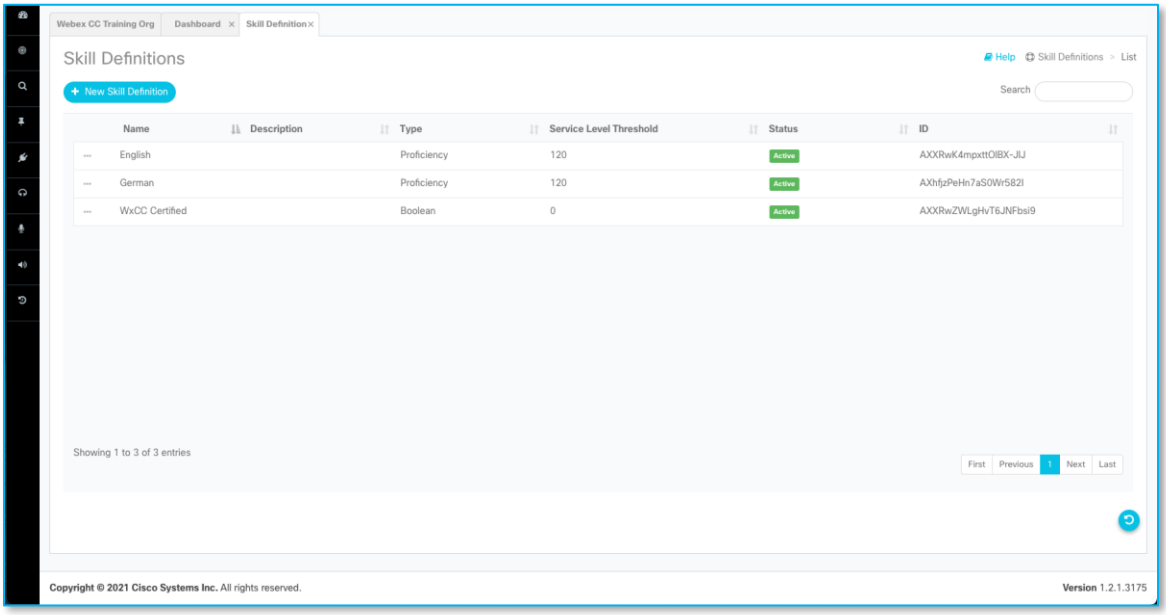
3.9 ☐ Fill in the information next to the red boxes, then click save.



3.10 ☐ Create another Proficiency Skill, called German, with a Service Level of 120 and a Boolean Skill, called WxCC Certified, with a Service Level of 0. Your screen should look like this.



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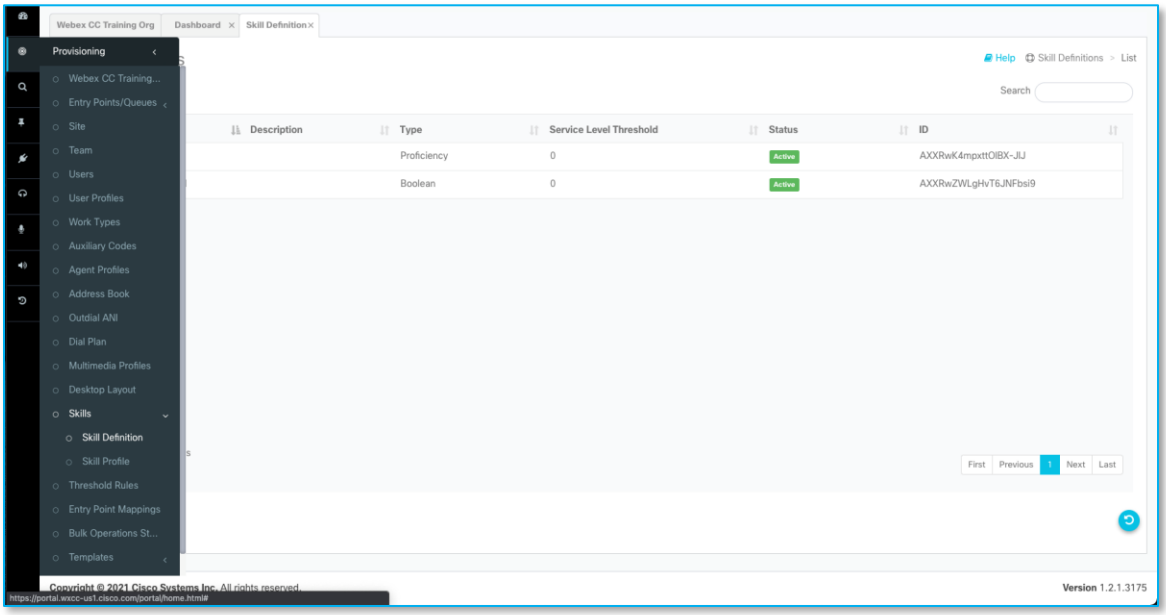
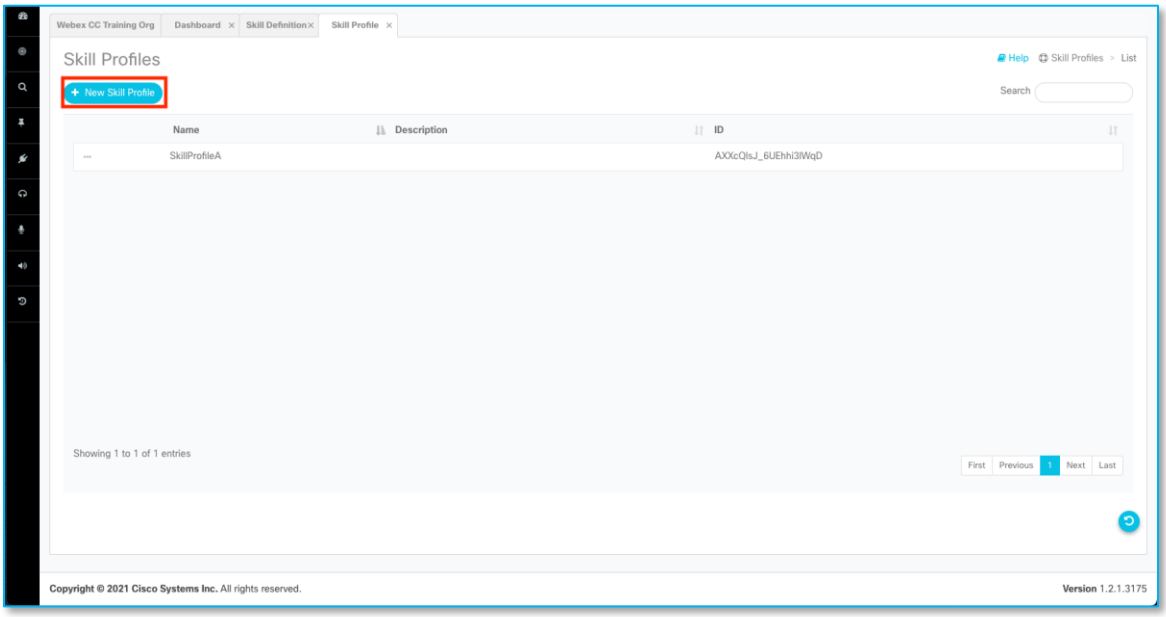
3.11 ☐ Select the "Provisioning" icon and then select "Skills" then "Skills Profile"



3.12 ☐ Click " + New Skill Profile"



3.13 ☐ Provision a new skill profile as follows and then click on "Save".

The name of the skill profile should be English 9-German 3-CC-Cert

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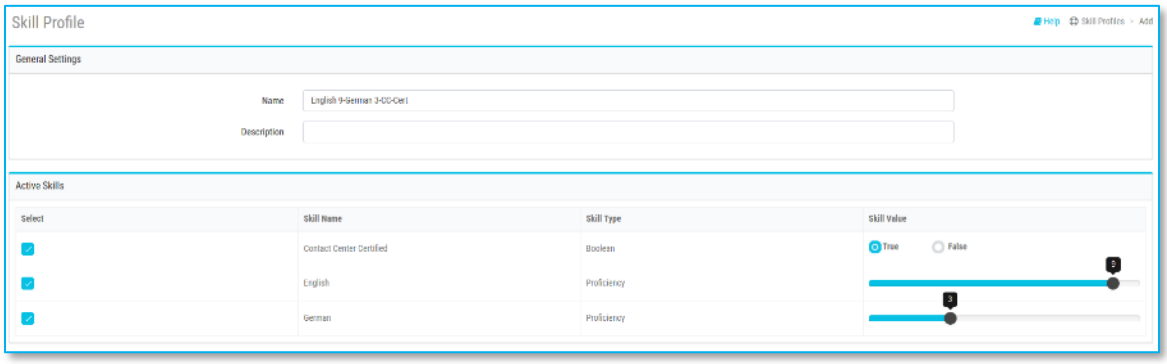
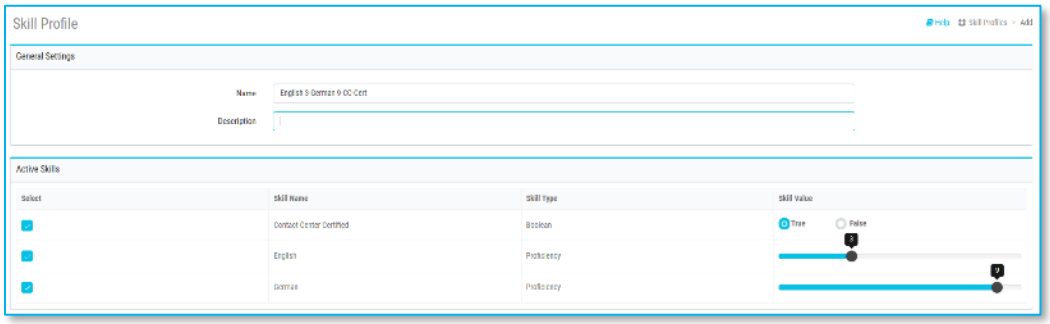


3.14 ☐ Click on "New Skill Profile

3.15 ☐ Provision a new skill profile as follows and then click on "Save".

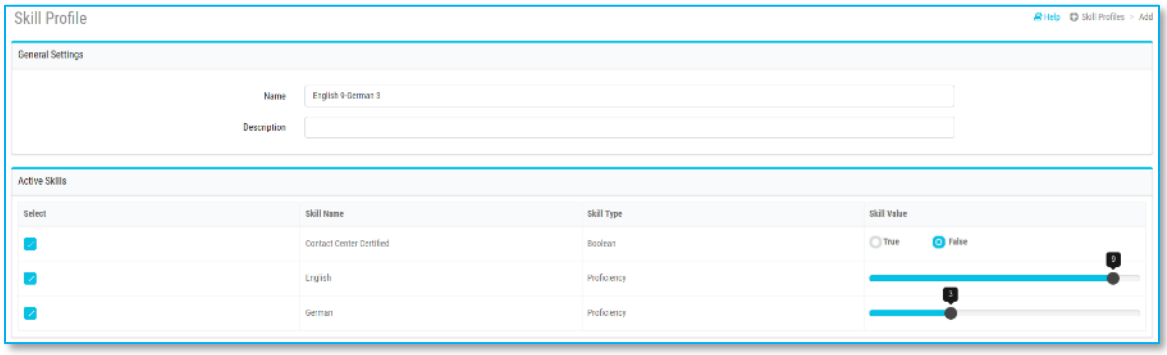
The name of the skill profile should be English 3-German 9-CC-Cert



3.16 ☐ Click on "New Skill Profile"

3.17 ☐ Provision a new skill profile as follows and then click on "Save".

The name of the skill profile should be English 9-German 3



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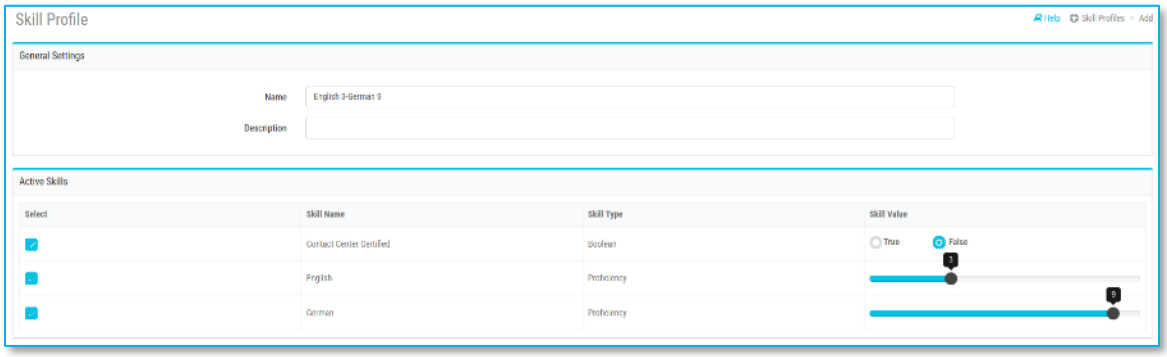
3.18 ☐ Click on "New Skill Profile"

3.19 ☐ Provision the following skill profile as follows and then click on "Save".

The name of the skill profile should be English 3-German 9



STOP! ***Please do not proceed until instructed to do so.***

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4 Lab 4 – Provisioning Sites and Teams

Purpose: Provisioning Sites and Teams

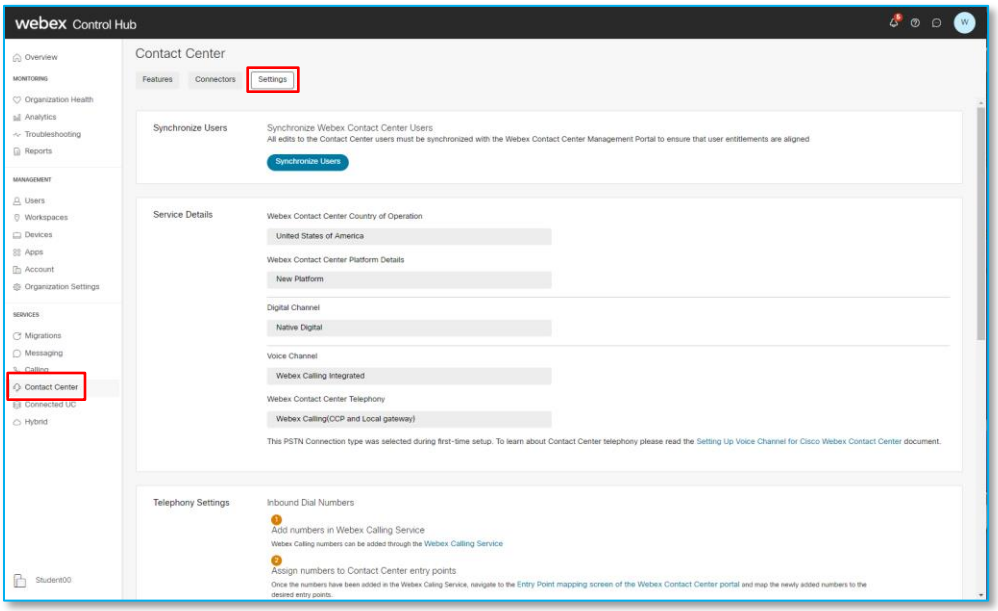
Expected Completion Time: 30 minutes.

Provisioning a Tenant under the main Service Provider

4.1 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

4.2 ☐ Once logged in, click "Contact Center" (under Services), then "Settings", as indicated in the following picture.



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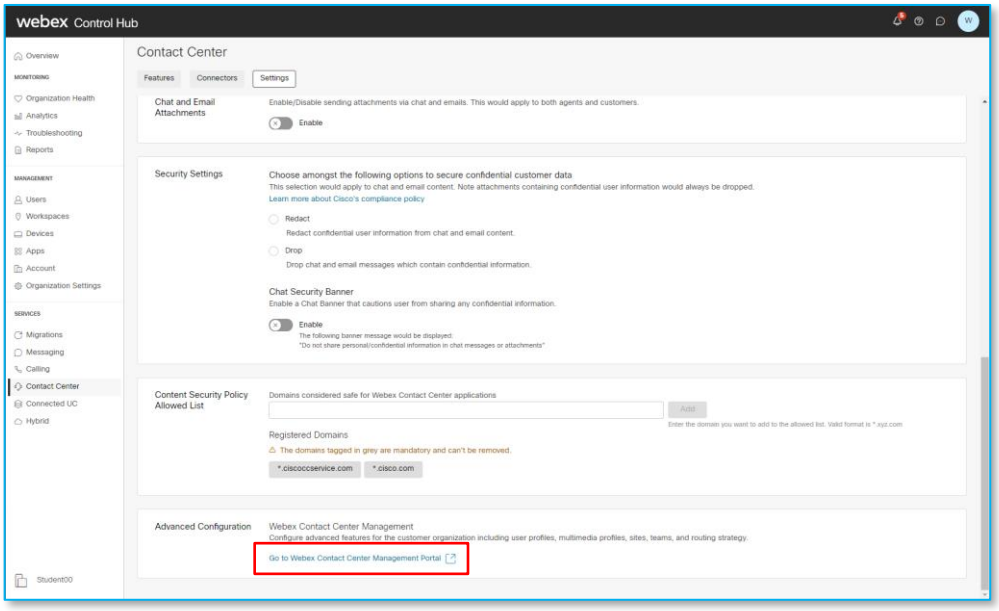
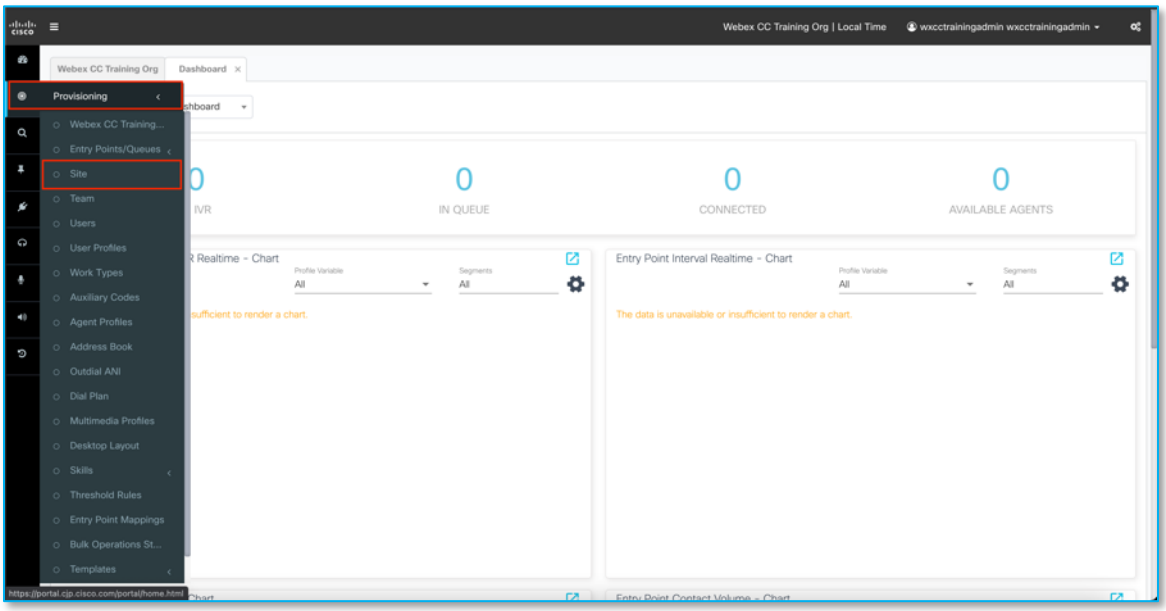
4.3 ☐ Click the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



4.4 ☐ Select the "Provisioning" icon and then select "Site"



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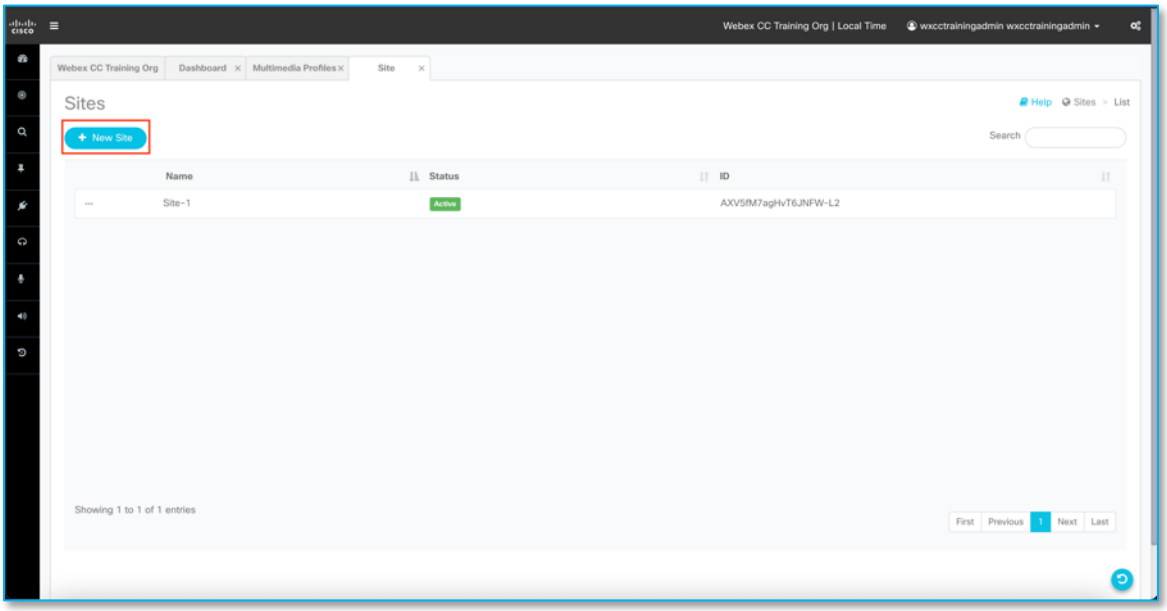
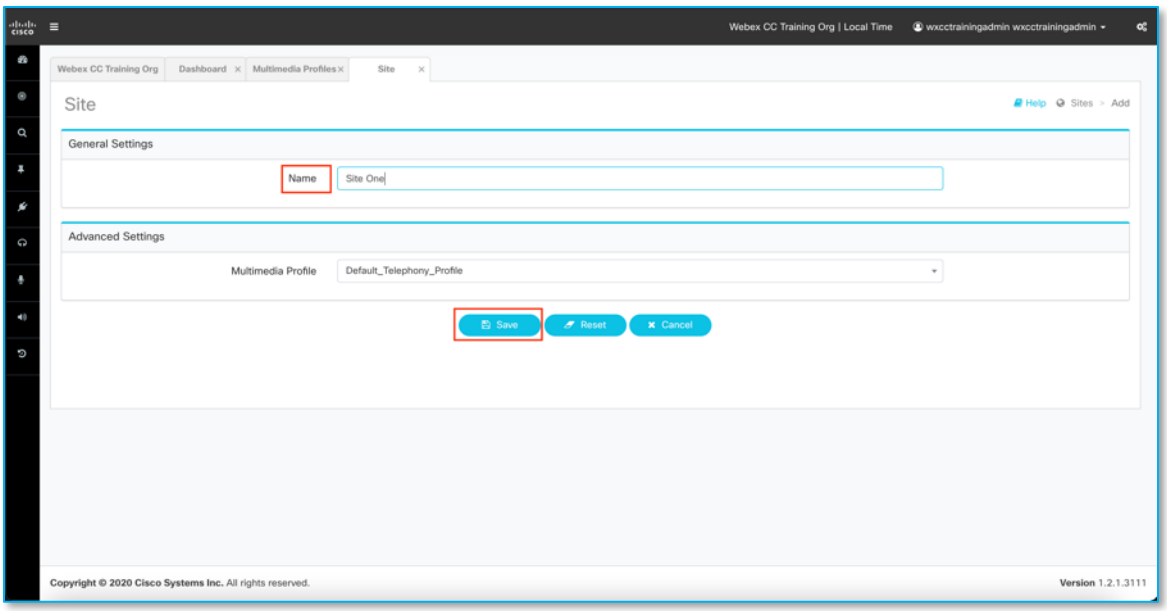
4.5 ☐ Click " + New Site"



4.6 ☐ Fill in the information next to the red box, then click save.



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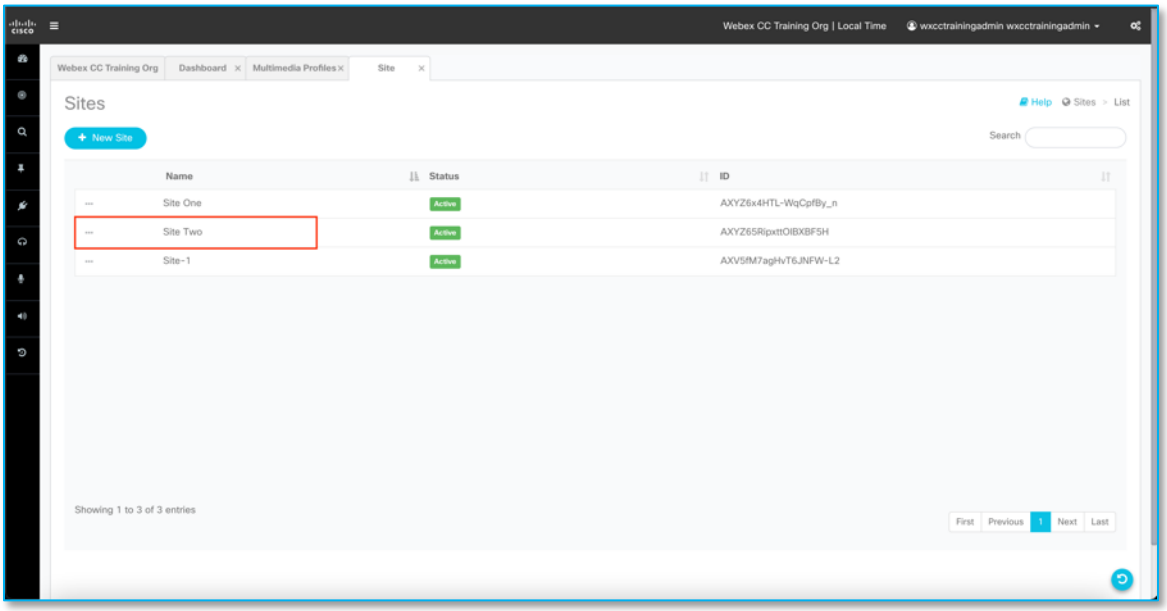
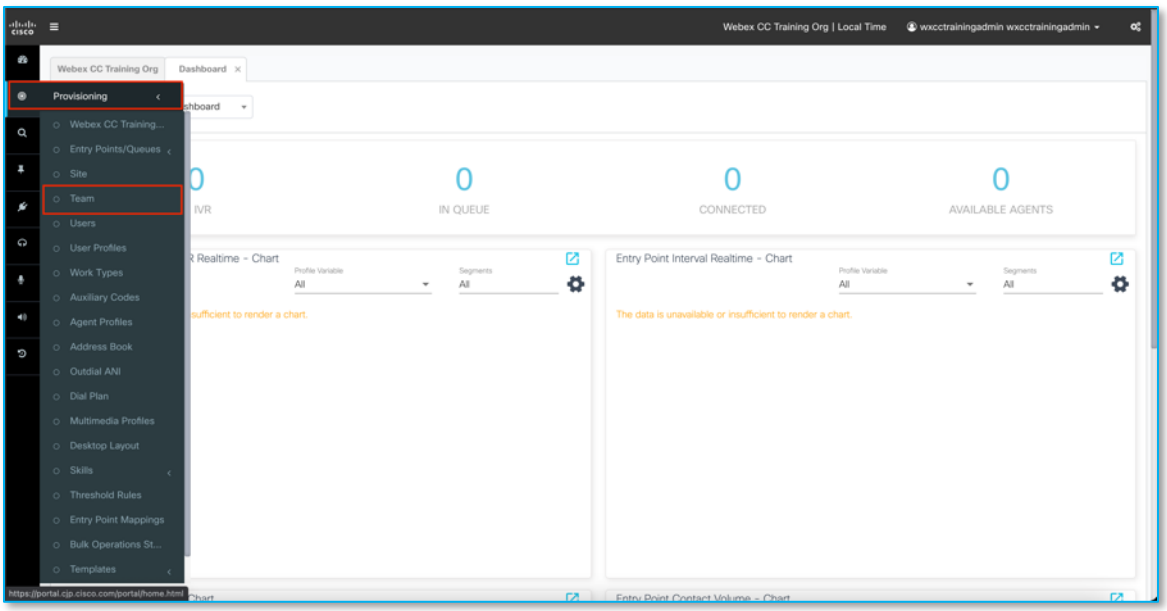
4.7 ☐ Repeat steps 4.5 and 4.6 and create “Site Two”



4.8 ☐ Select the “Provisioning” icon and then select “Team”



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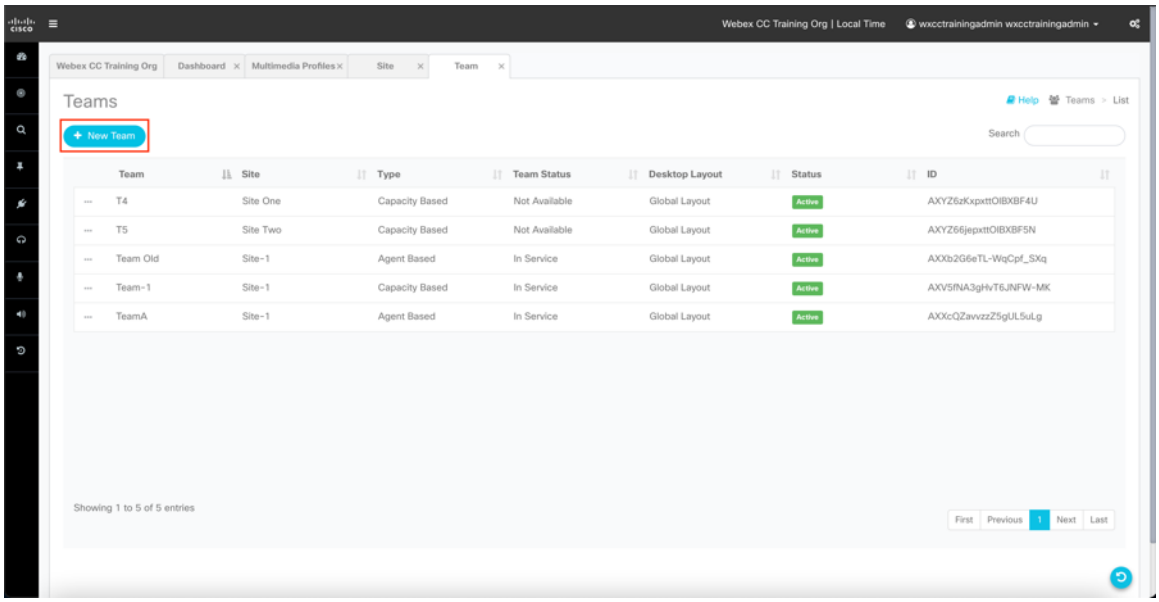
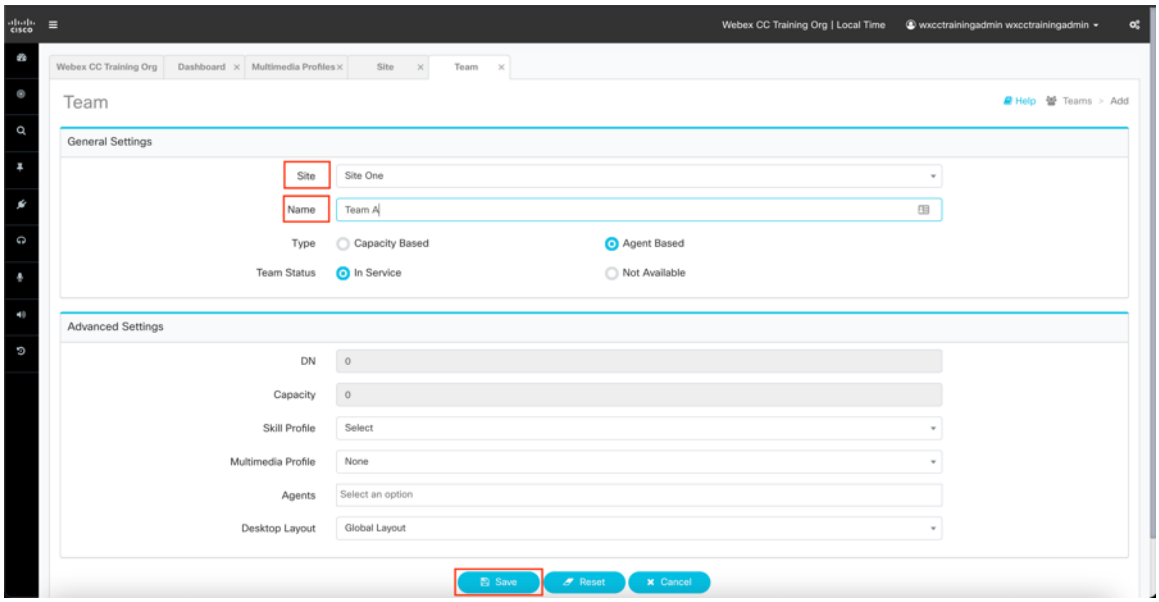
4.9 ☐ Click " + New Team"



4.10 ☐ Fill in the information next to the red boxes, then click save.



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4.11 ☐ Repeat steps 4.9 and 4.10 and create the following teams:

4.11 Team Name	4.12 Site
Team B	Site One
Team C	Site Two
Team D	Site Two

STOP! ***Please do not proceed until instructed to do so.***

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5 Lab 5 – Provisioning Auxiliary Codes, Agent Profiles and Configuring Agents and Creating a Supervisor.

Purpose: Creating new Idle and Wrap-Up codes, a new Agent Profile and configuring 6 Agents plus a Supervisor.

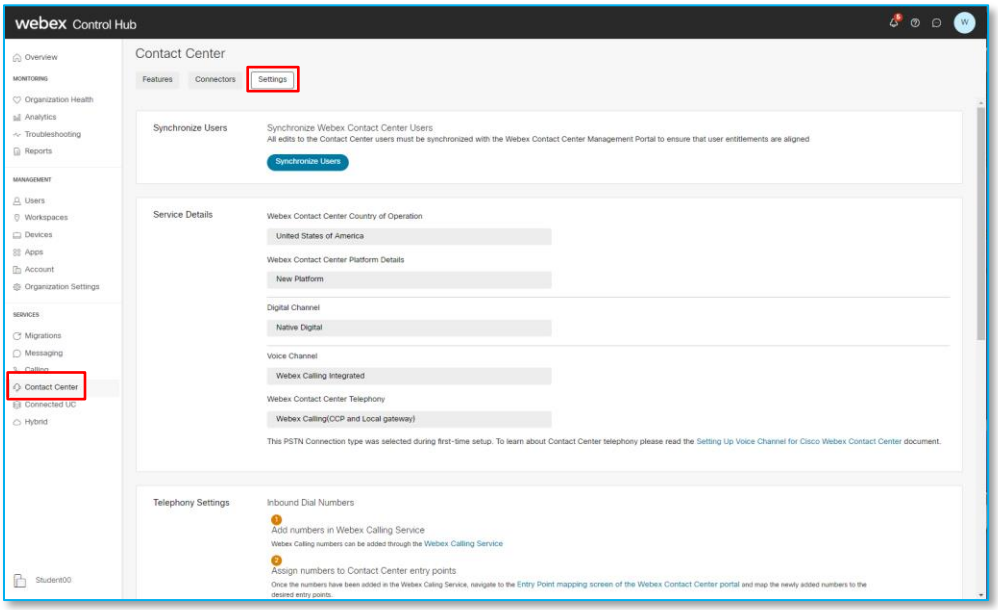
Expected Completion Time: 40 minutes.

Provisioning a Tenant under the main Service Provider

5.1 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

5.2 ☐ Once logged in, click "Contact Center" (under Services), then "Settings", as indicated in the following picture.



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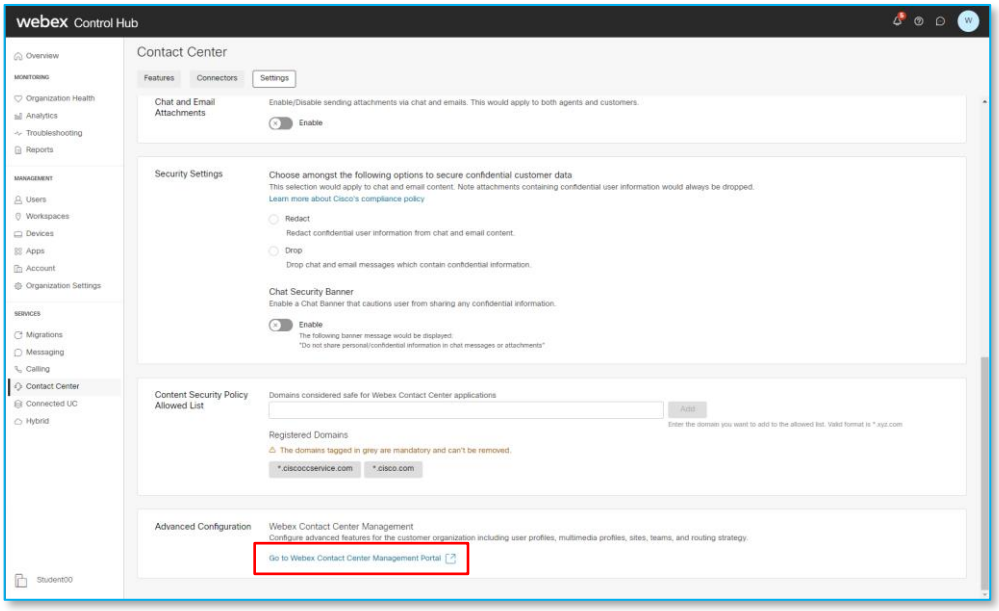
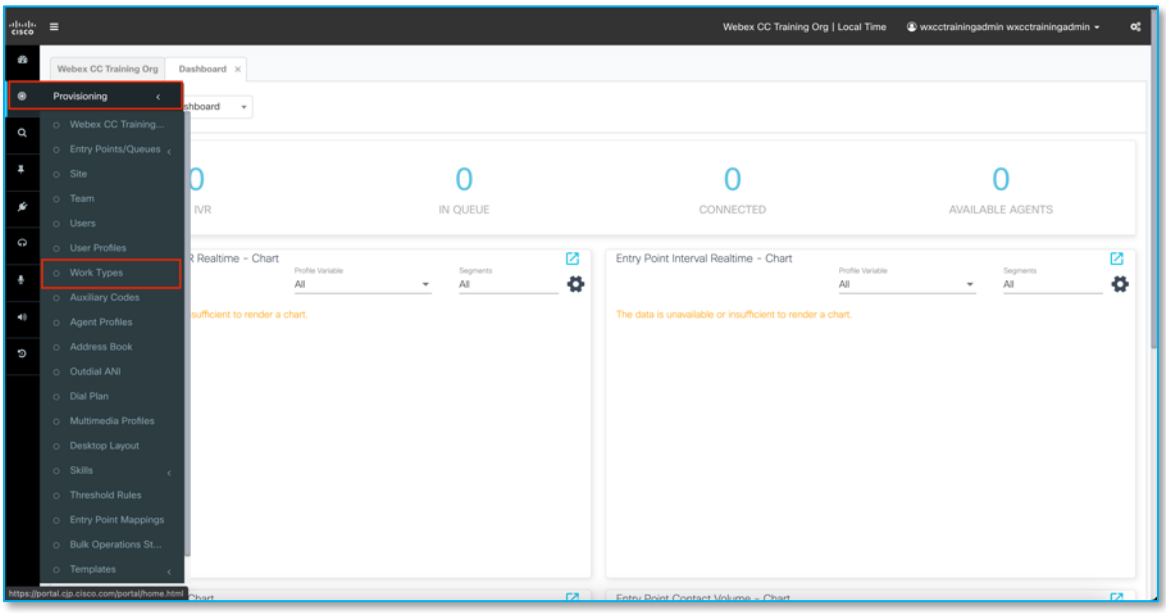
5.3 ☐ Click the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



5.4 ☐ Select the "Provisioning" icon and then select "Work Types"



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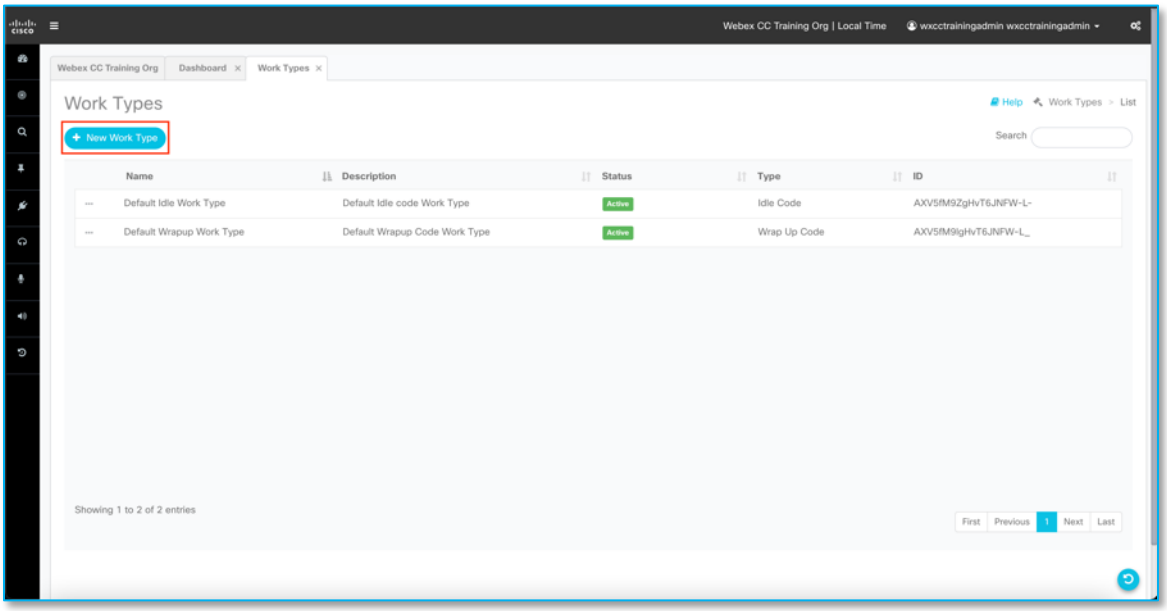
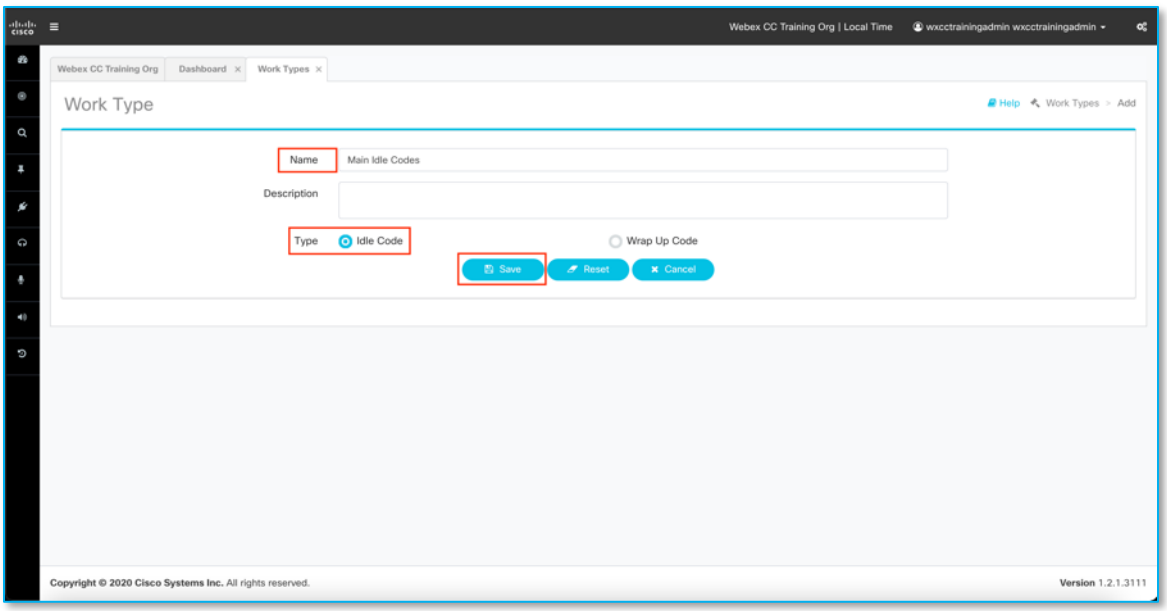
5.5 ☐ Click " + Work Type"



5.6 ☐ Fill in the information as next to the red boxes, then click save



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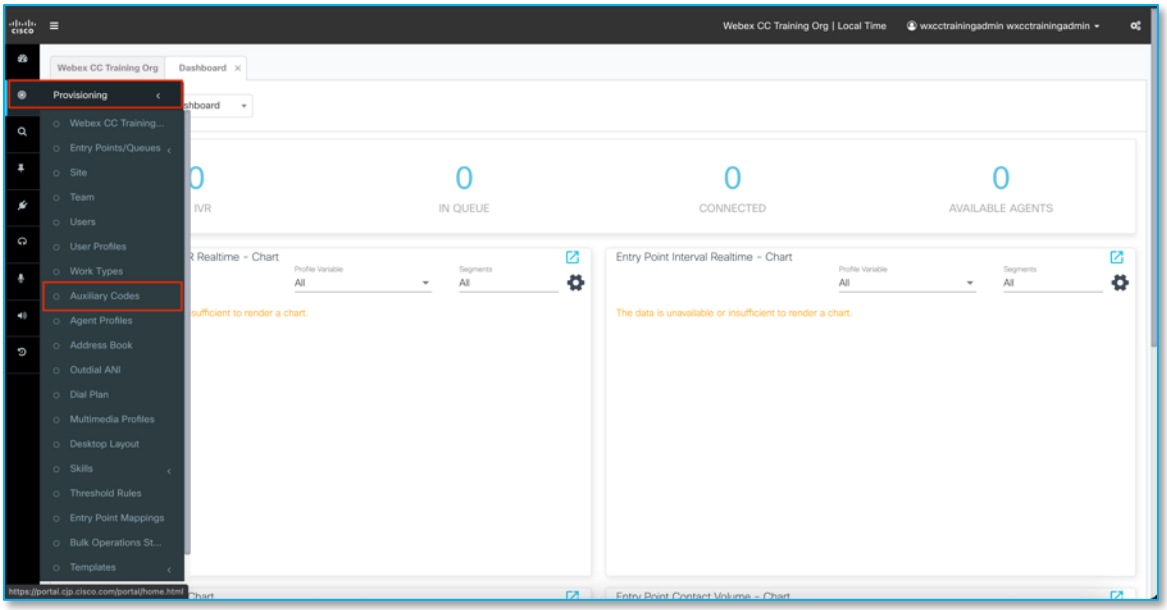
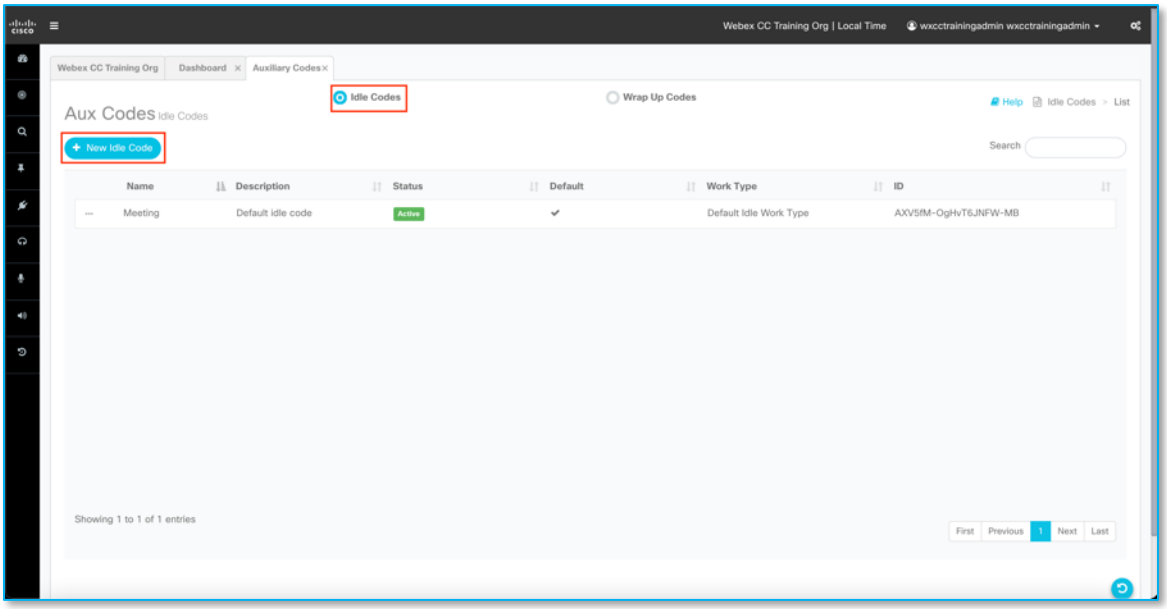
5.7 ☐ **Create a Wrap Up work type called "Main Wrap Codes" – remember to change the radio button to the new work type.**

5.8 ☐ **Select the "Provisioning" icon and then select "Auxiliary Codes"**



5.9 ☐ **Click " + New Idle Code"**



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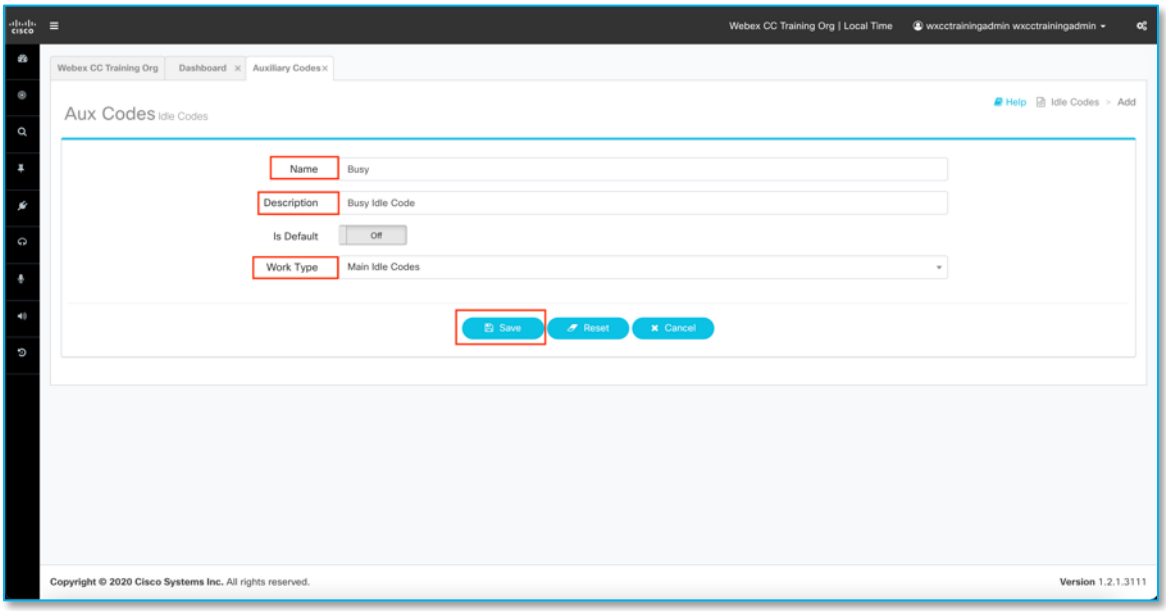
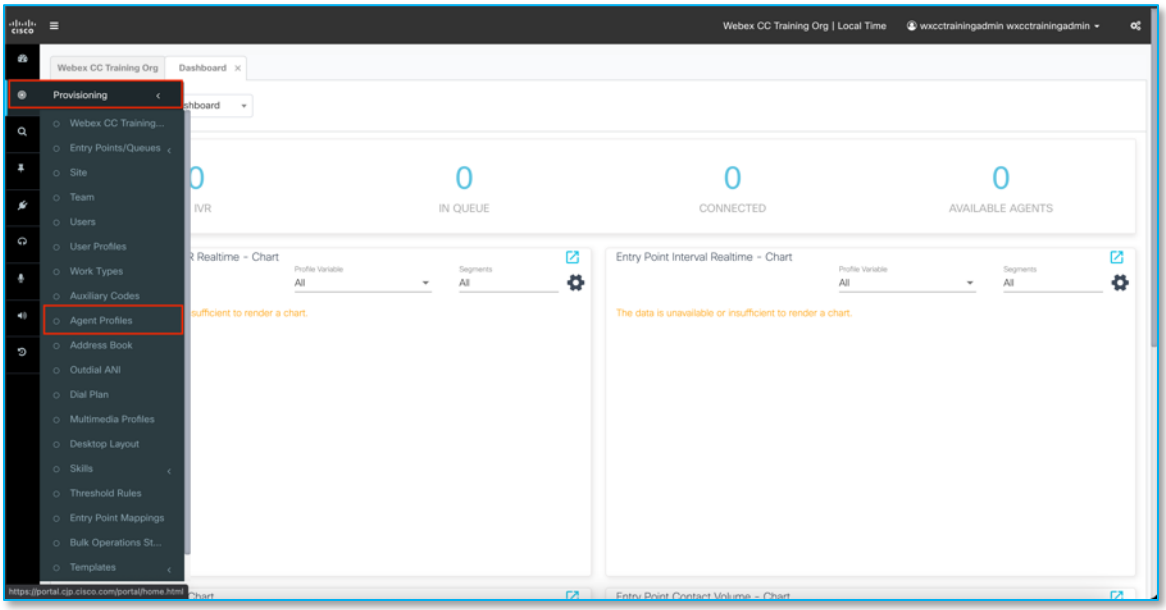
5.10 ☐ Fill in the information as next to the red boxes, then click save



5.11 ☐ Create a New Wrap Up Code called "Support Issue" in the Main Wrap Codes work type. – remember to change the radio button to the Wrap Up Codes.

5.12 ☐ Select the "Provisioning" icon and then select "Agent Profiles"



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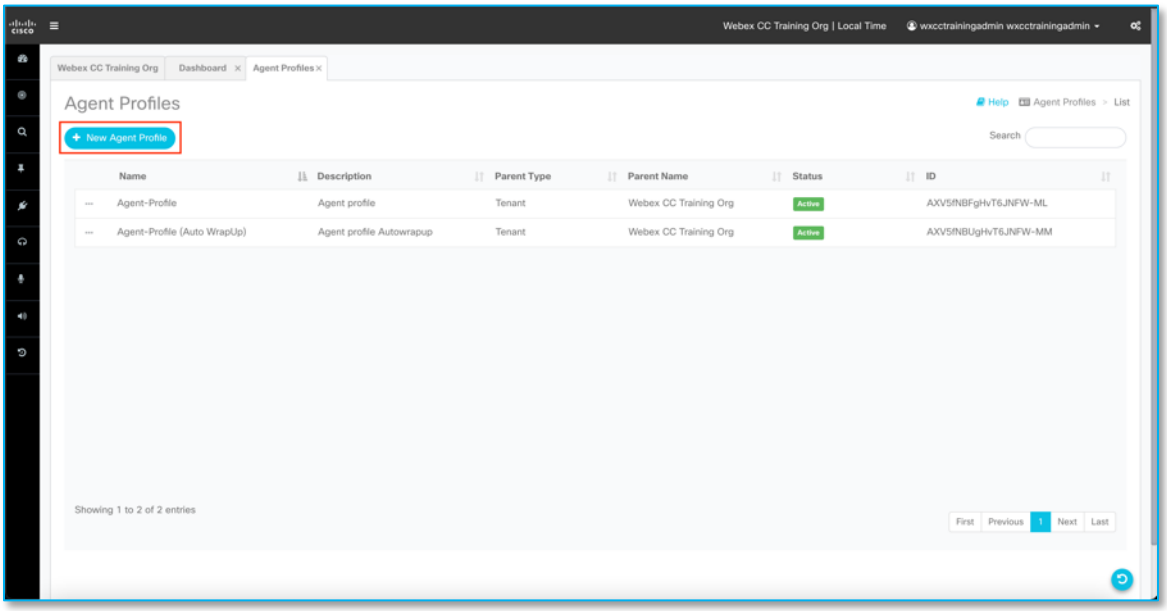
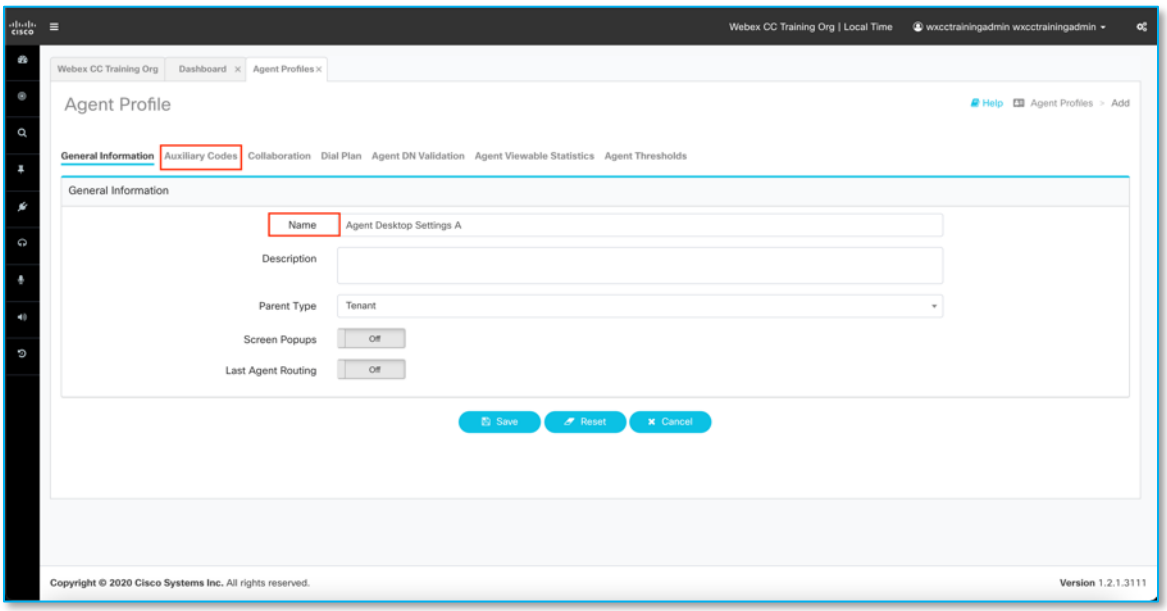
5.13 ☐ Click " + New Agent Profile"



5.14 ☐ Fill in the information as next to the red boxes, then click "Auxiliary Codes"



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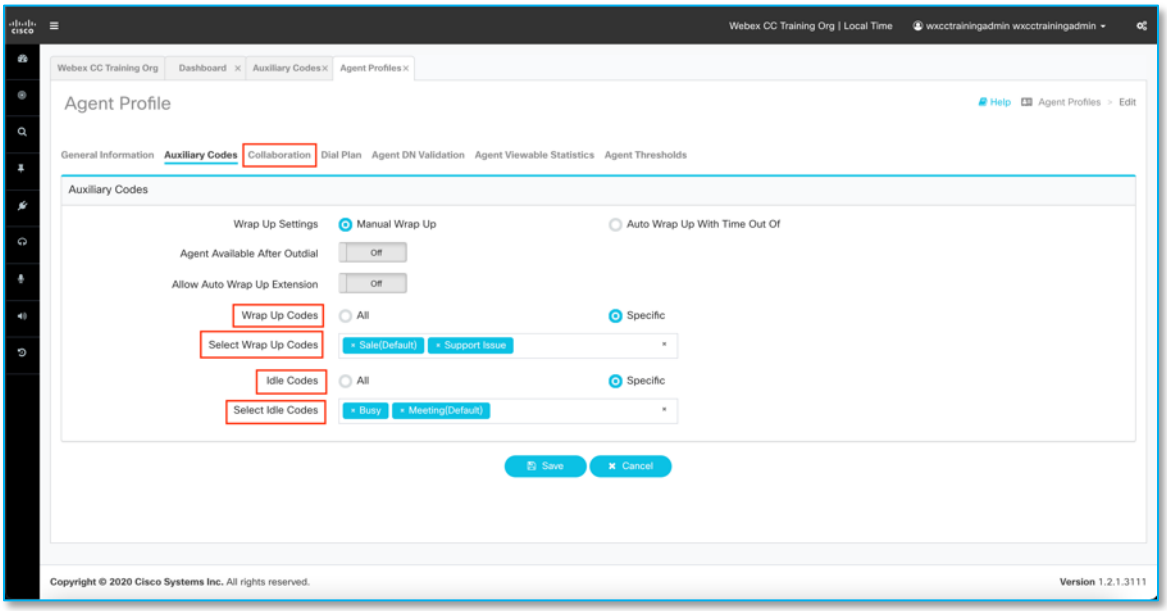
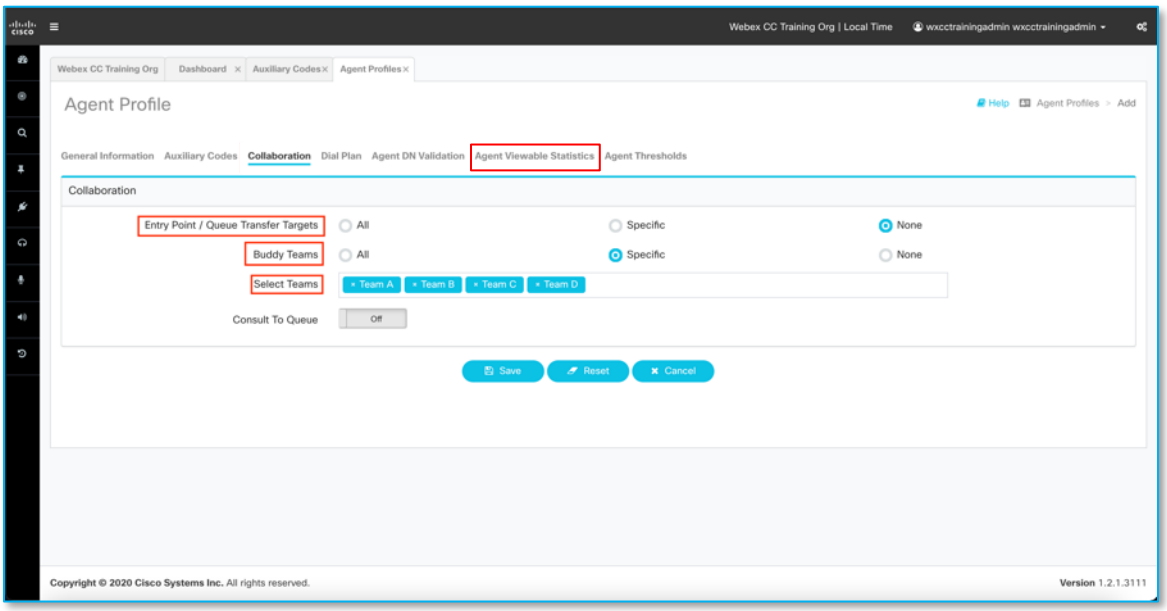
5.15 ☐ Fill in the information as next to the red boxes, then click "Collaboration"



5.16 ☐ Fill in the information as next to the red boxes, then click "Agent Viewable Statistics"



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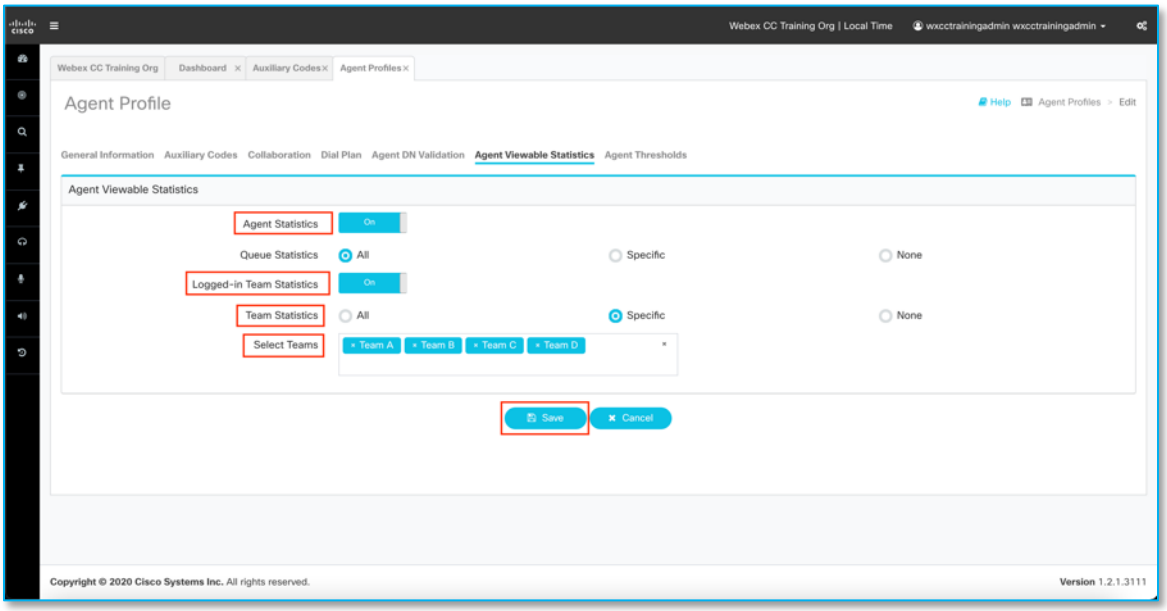
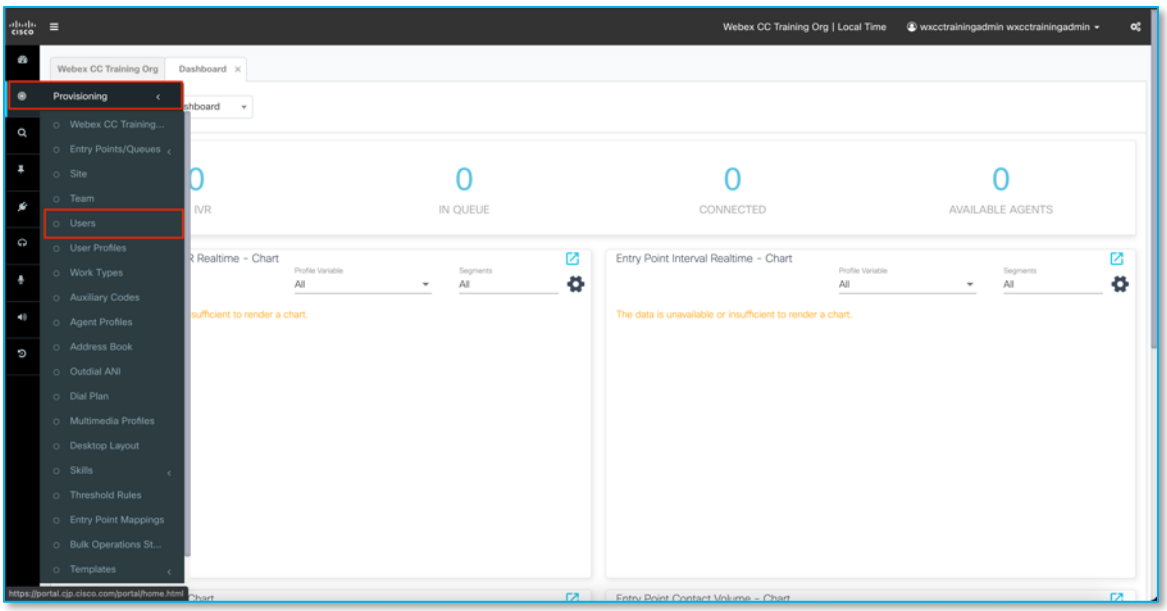
5.17 ☐ Fill in the information as next to the red boxes, then click Save



5.18 ☐ Select the "Provisioning" icon and then select "Users"



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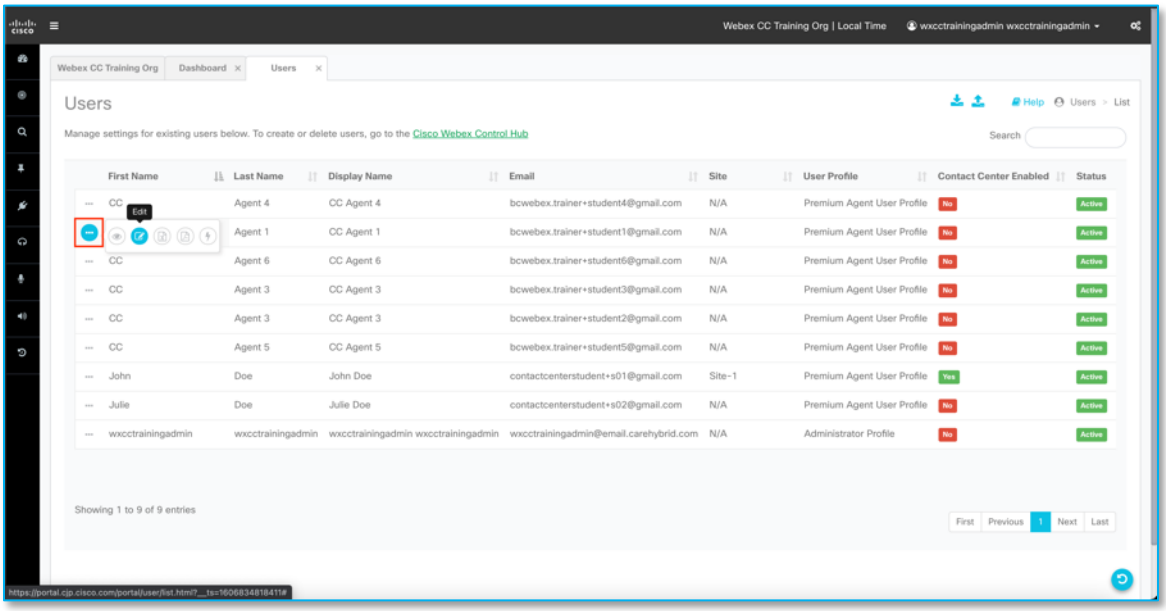
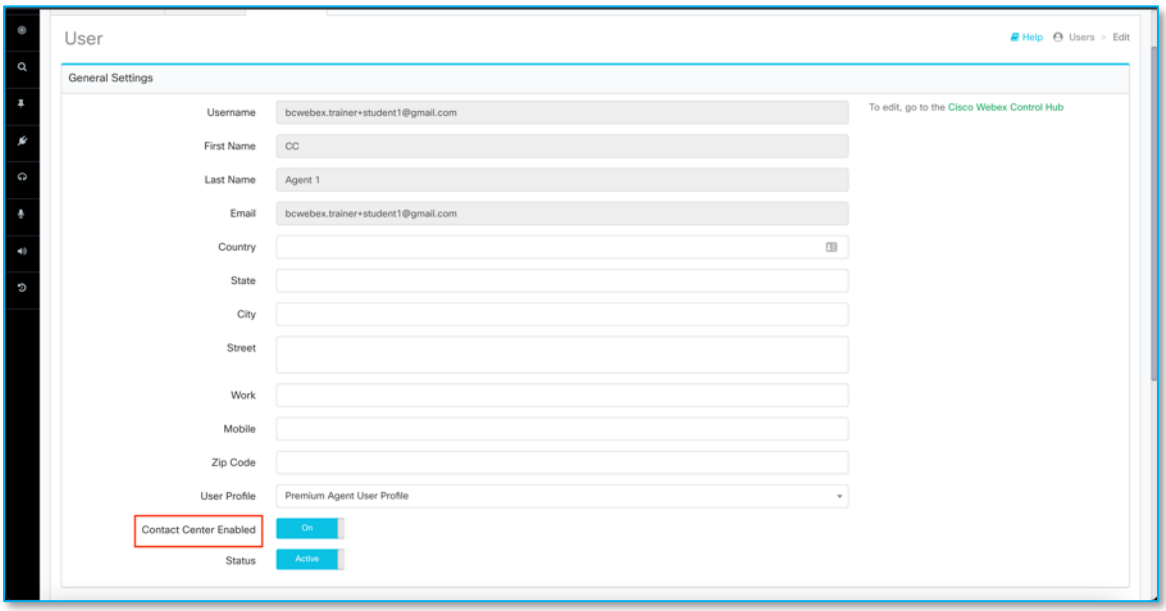
5.19 ☐ Click the three dots next to "Agent 1" and select edit.



5.20 ☐ Fill in the information as next to the red boxes, then scroll down the page"



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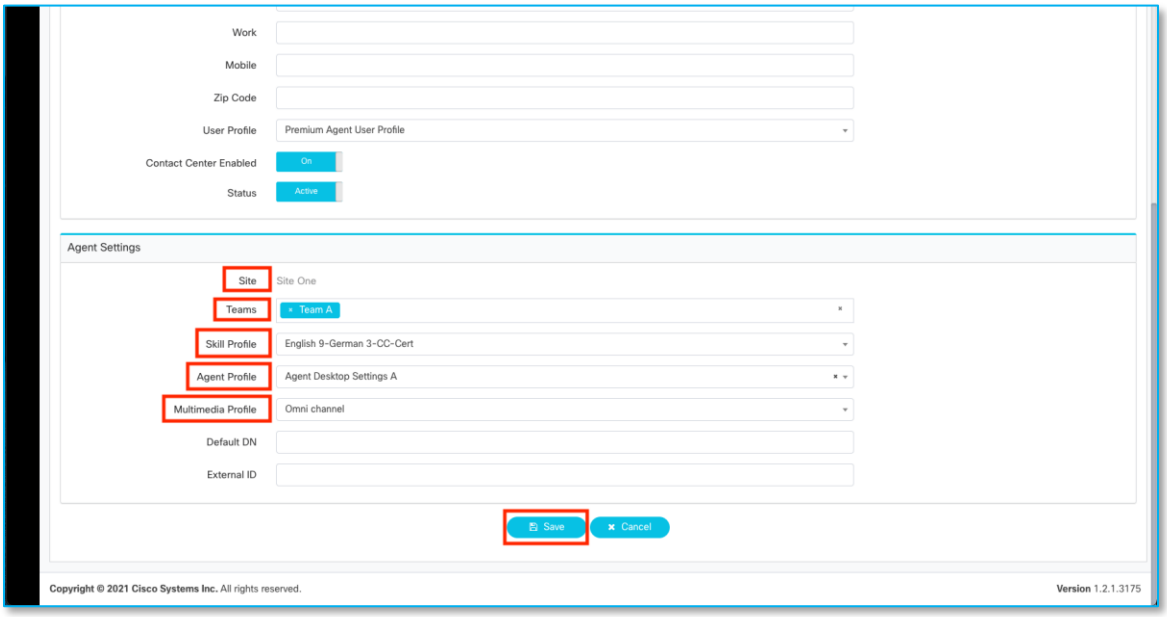
5.21 ☐ Fill in the information as next to the red boxes, then click save.



5.22 ☐ Repeat steps 5.19 to 5.21 using the table below.

Agent	Site	Team	Skill Profile	Agent Profile	MM Profile
Agent 2	One	A	English 9-German 3-CC-Cert	Agent Desktop Settings A	Omni channel
Agent 3	One	B	English 9-German 3	Agent Desktop Settings A	Omni channel
Agent 4	One	B	English 9-German 3	Agent Desktop Settings A	Omni channel
Agent 5	Two	C	English 3-German 9-CC-Cert	Agent Desktop Settings A	Omni channel
Agent 6	Two	D	English 3-German 9	Agent Desktop Settings A	Omni channel

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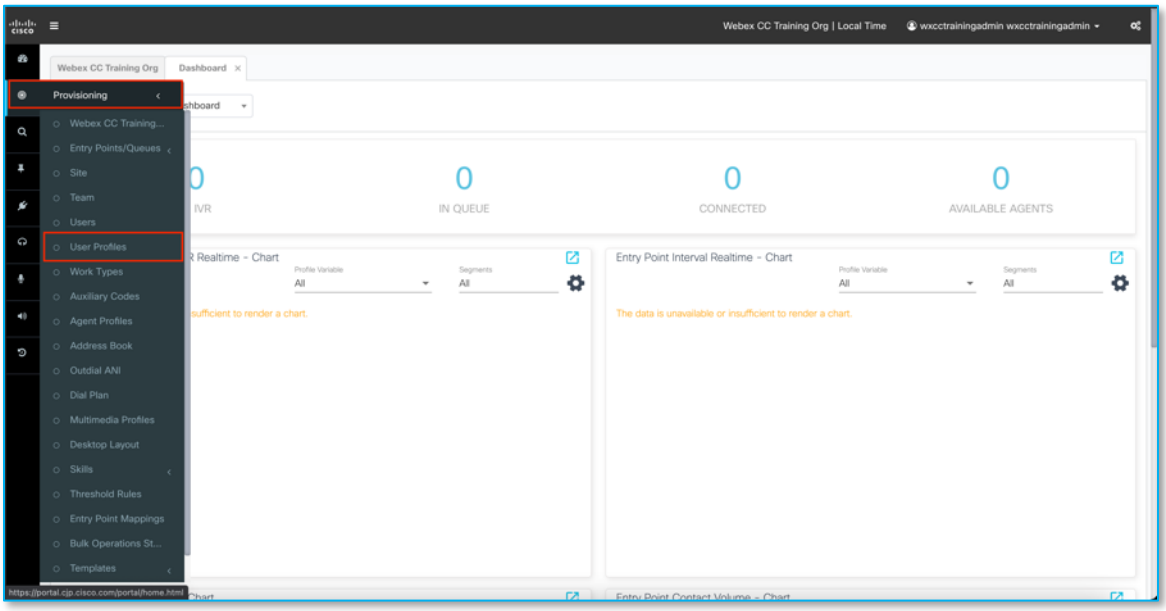
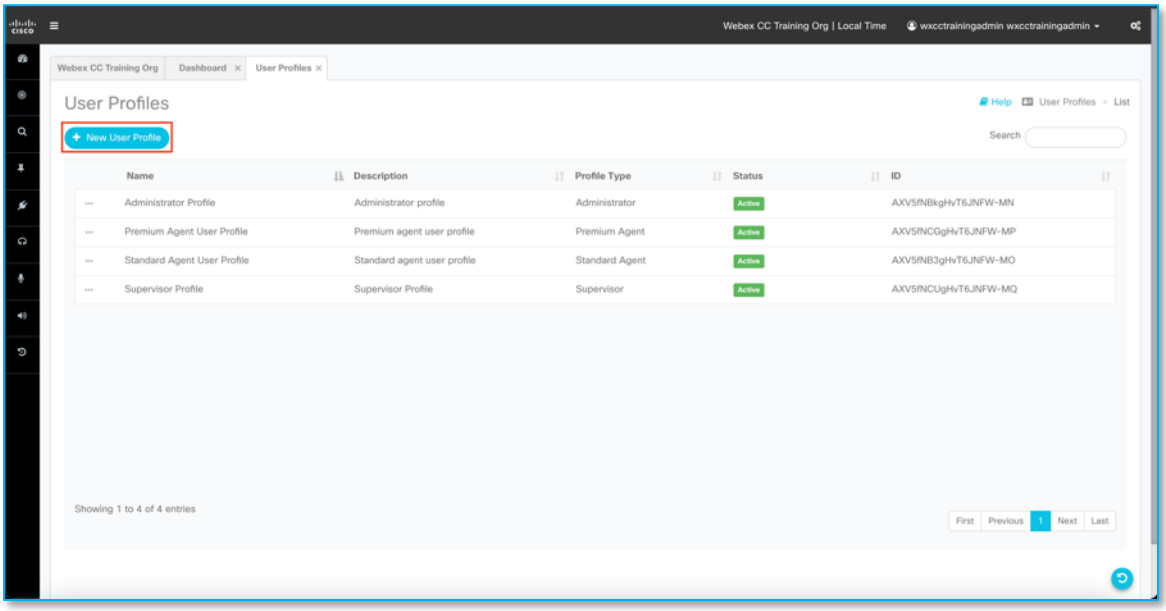
5.23 ☐ Create a new User called "Supervisor" with a Supervisor license in Control Hub. – Remember the steps are described in Lab 1 if required (make sure to activate them).

5.24 ☐ Select the "Provisioning" icon and then select "User Profiles"



5.25 ☐ Click " + New User Profile"



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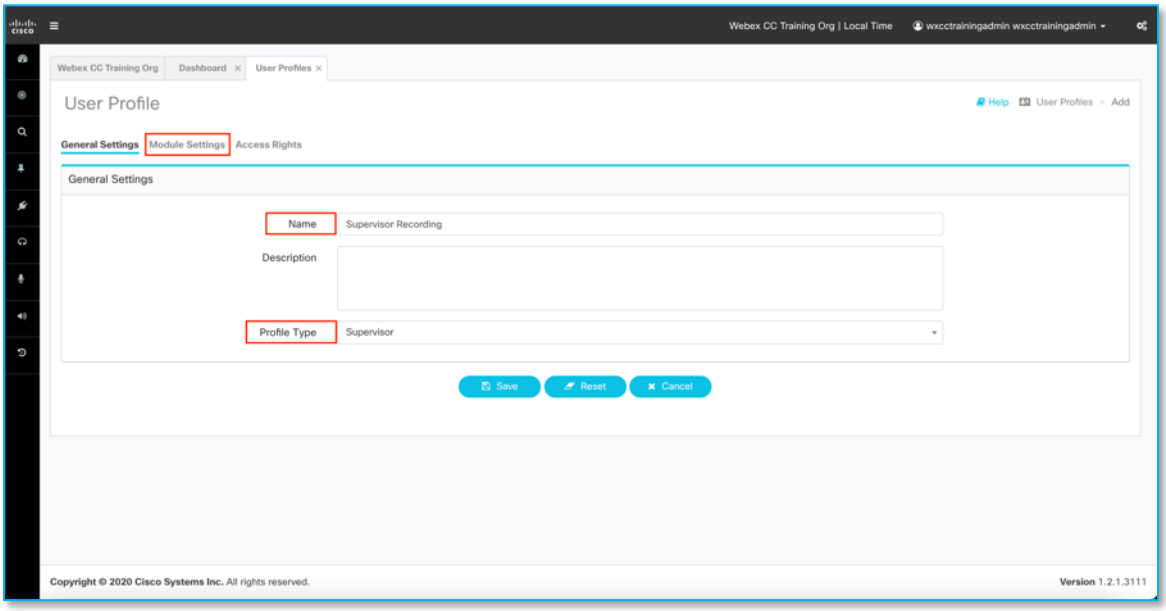
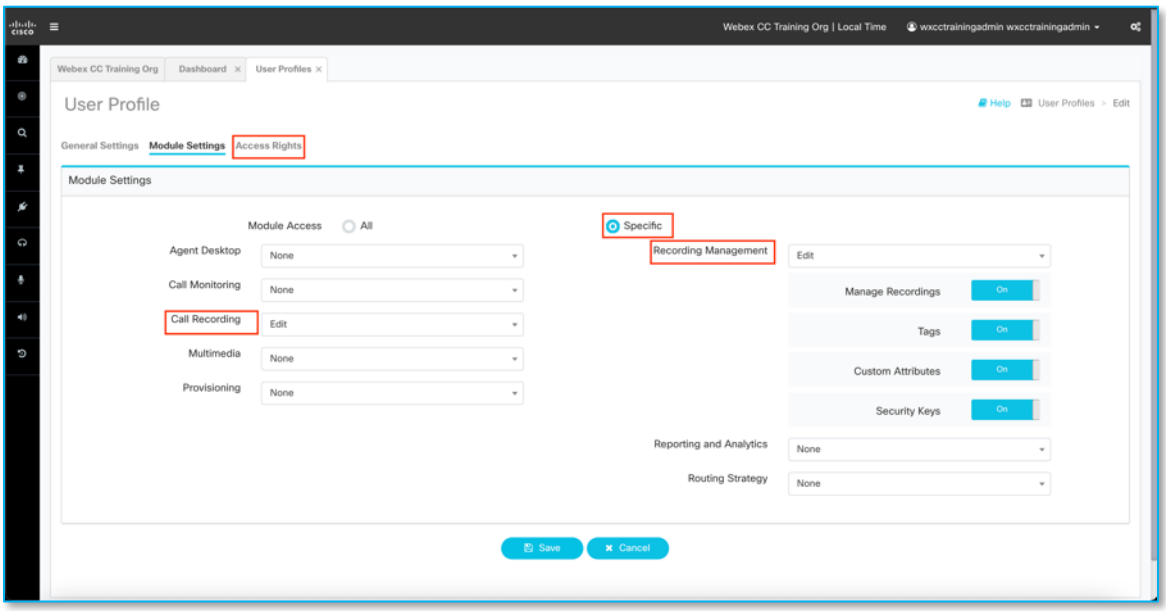
5.26 ☐ Fill in the information as next to the red boxes, then click "Module Settings".



5.27 ☐ Fill in the information as next to the red boxes, then click "Access Rights.



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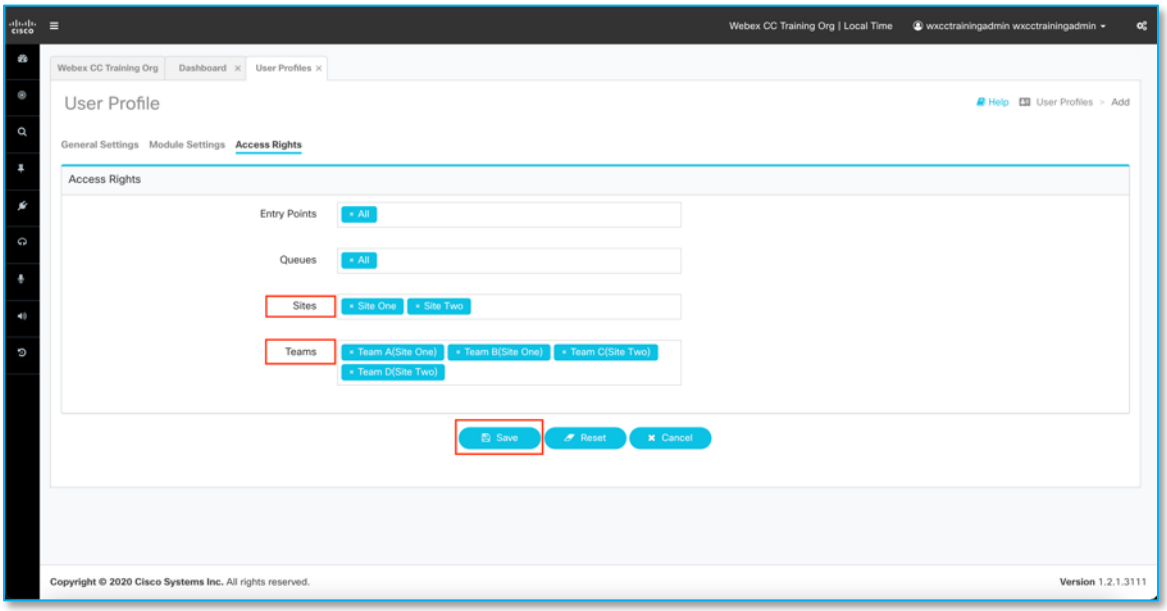
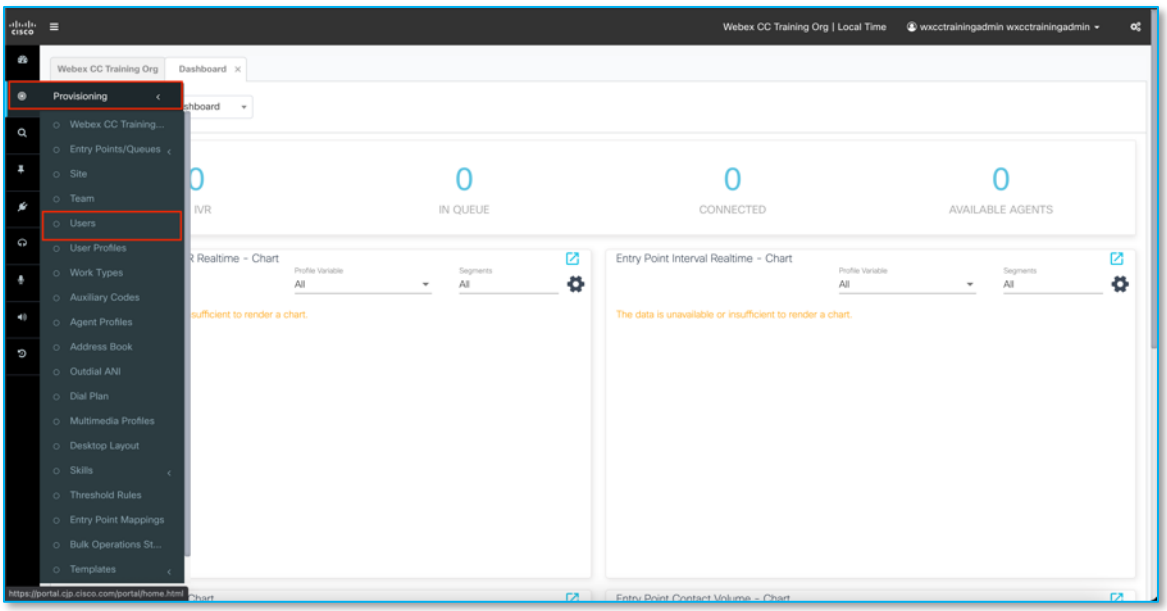
5.28 ☐ Fill in the information as next to the red boxes, then click save.



5.29 ☐ Select the "Provisioning" icon and then select "Users"



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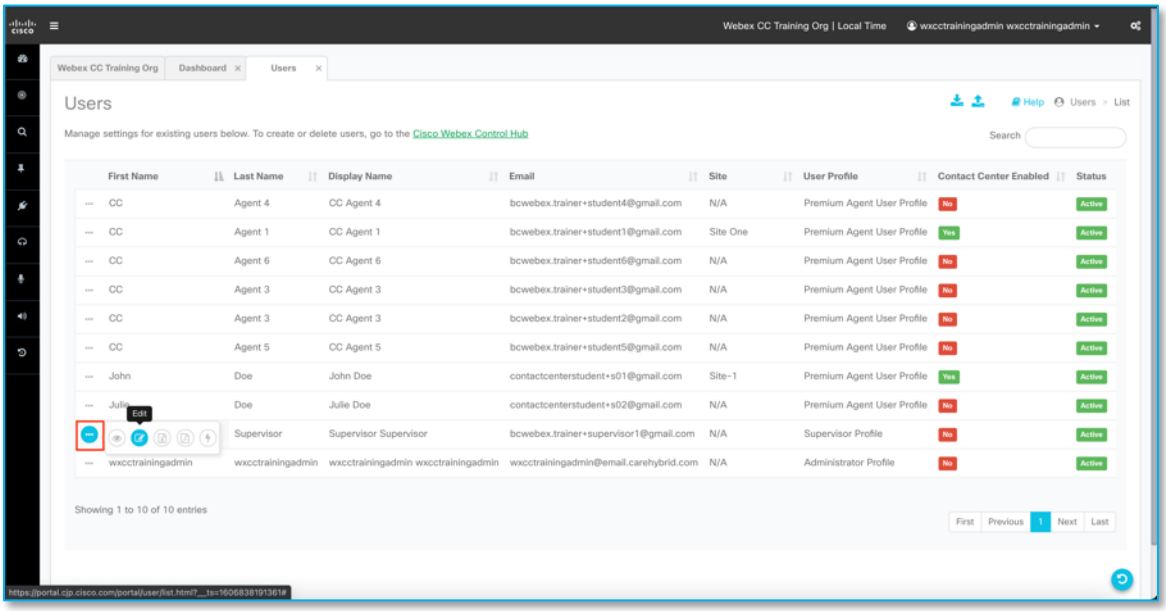
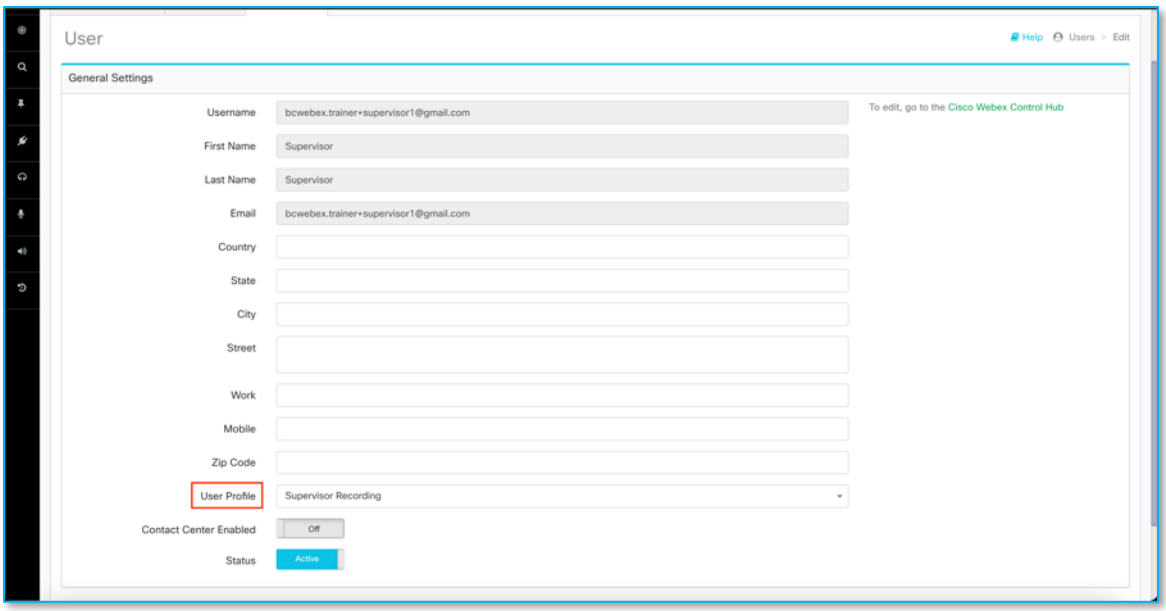
5.30 ☐ Click the three dots next to "Supervisor" and select edit.



5.31 ☐ Fill in the information as next to the red boxes, then click save.



STOP! ***Please do not proceed until instructed to do so.***

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6 Lab 6 – Provisioning Entry Points and Queues and adding Resources

Purpose: Provisioning Entry Points and Queues and adding Resources

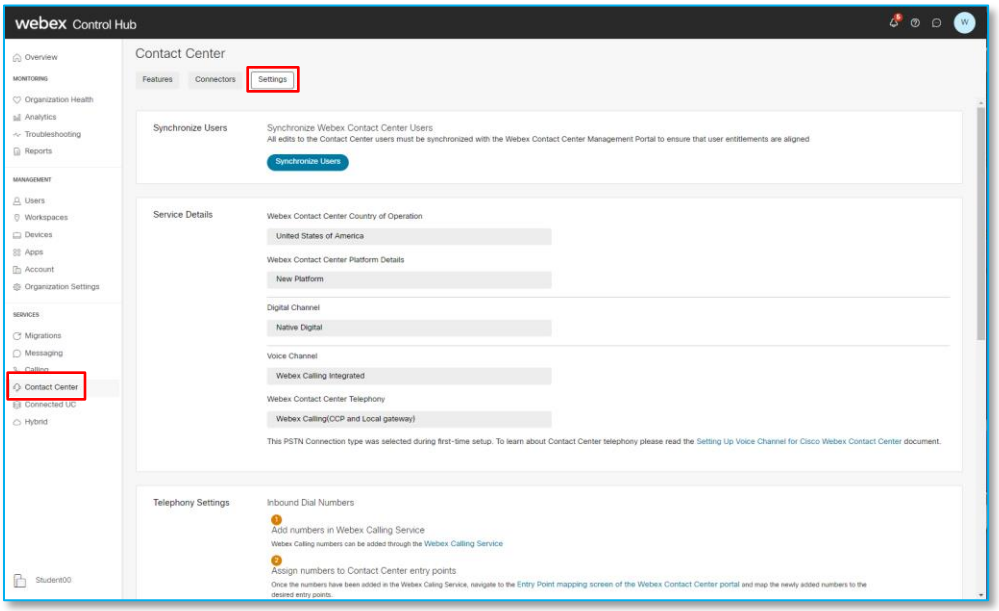
Expected Completion Time: 15 minutes.

Provisioning a Tenant under the main Service Provider

6.1 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

6.2 ☐ Once logged in, click "Contact Center" (under Services), then "Settings", as indicated in the following picture.



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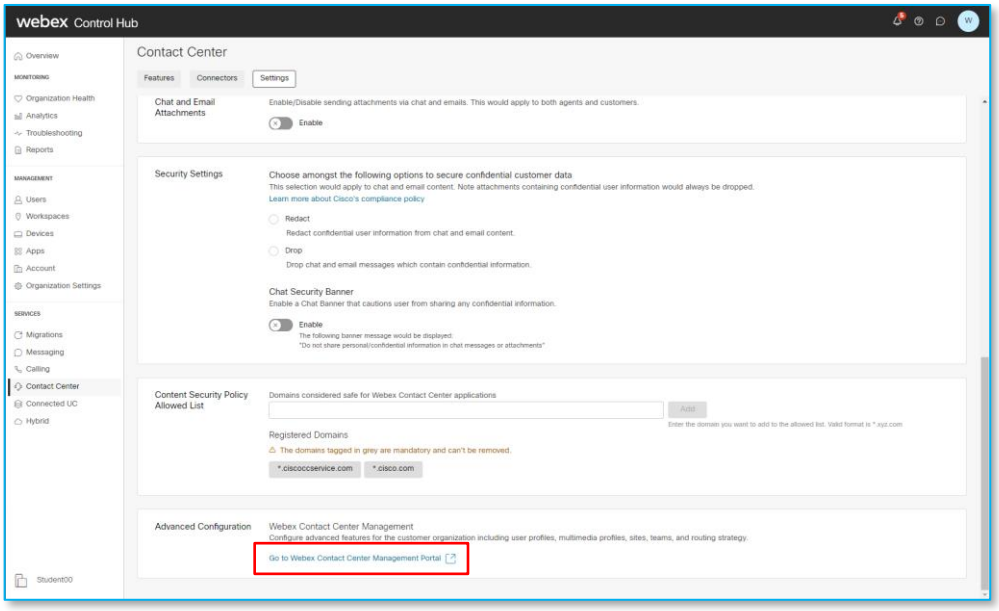
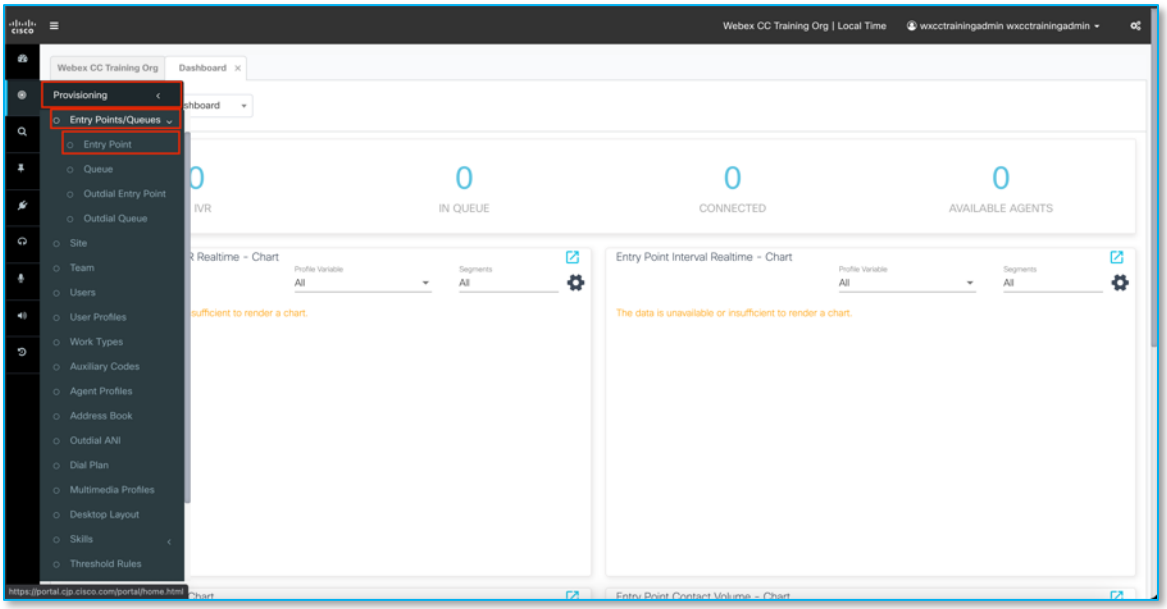
6.3 ☐ Click the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



6.4 ☐ Select the "Provisioning" icon and then select "Entry Points/Queues", finally Entry Point.



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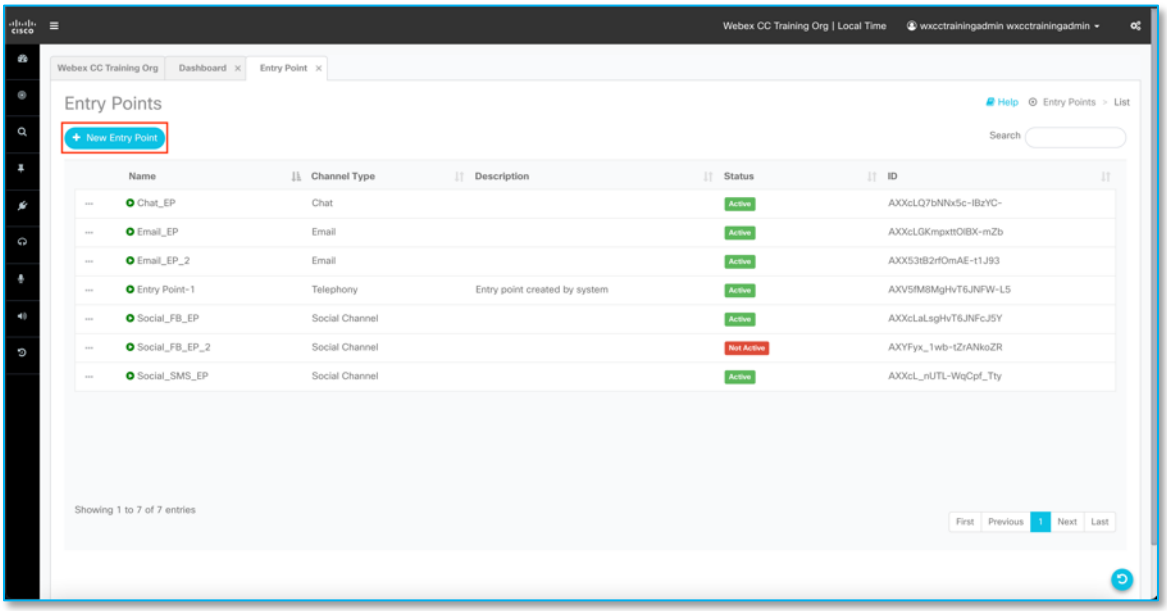
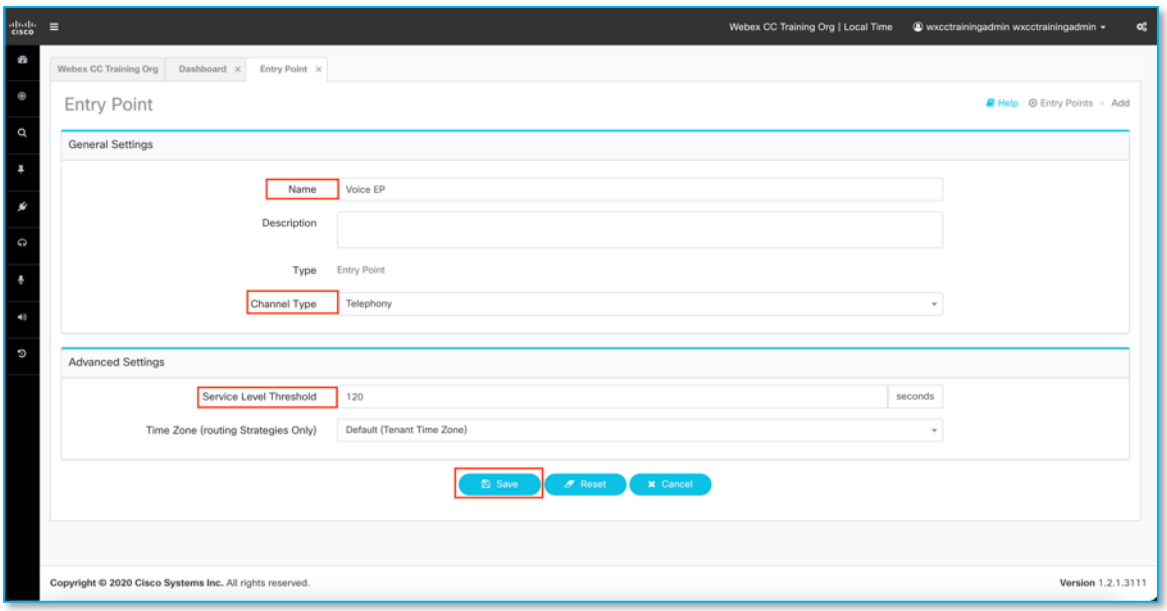
6.8 ☐ Click " + New Entry Point"



6.8 ☐ Fill in the information as next to the red boxes, then click save.



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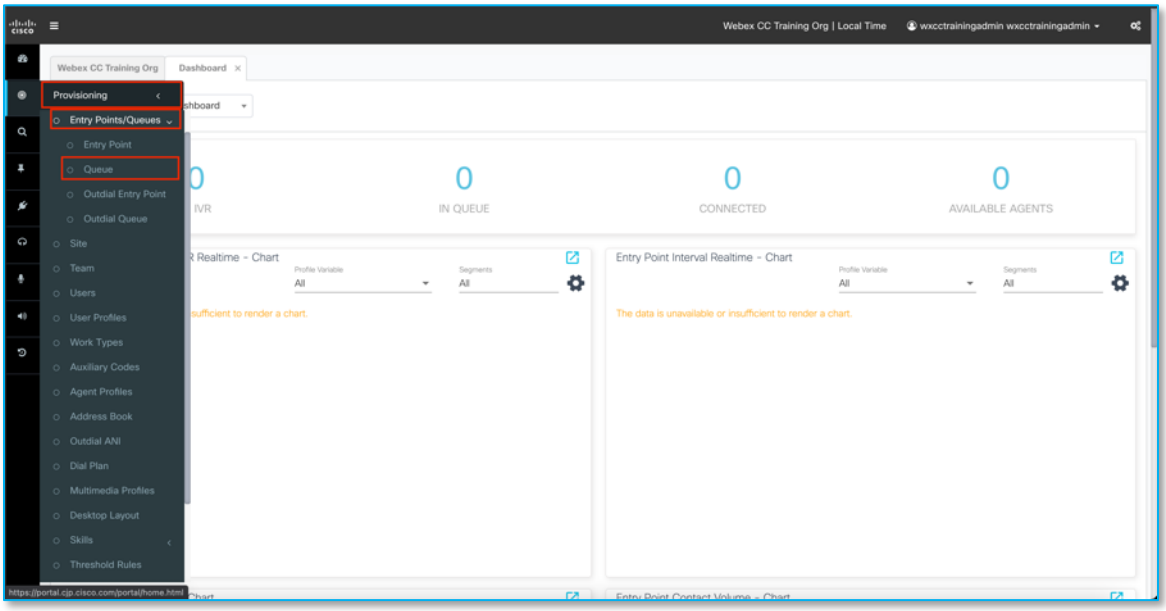
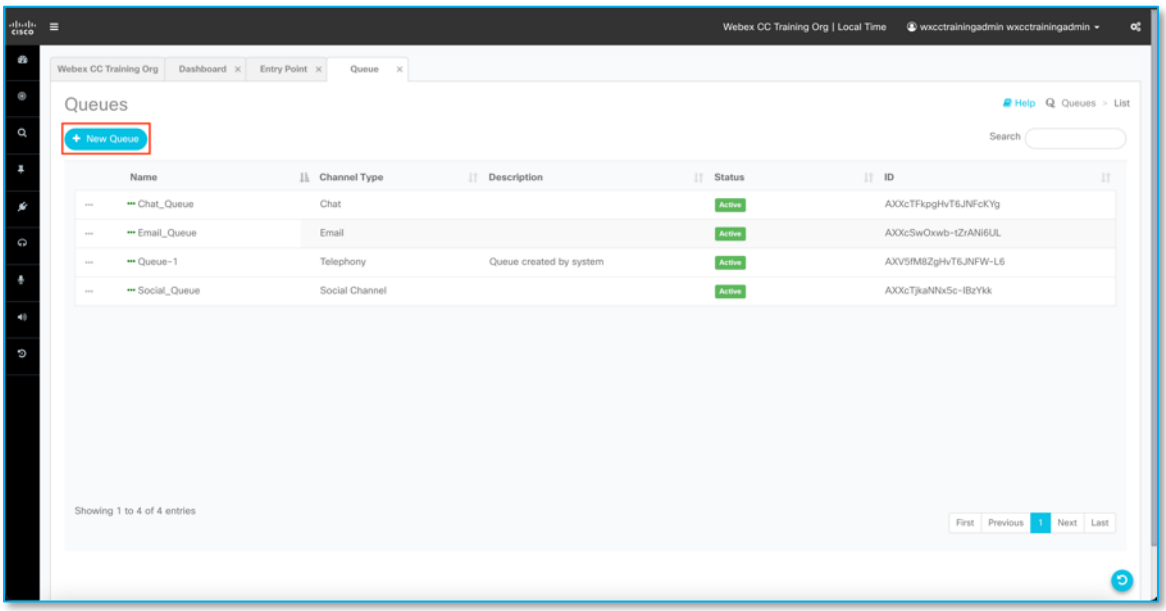
6.5 ☐ Select the "Provisioning" icon and then select "Entry Points/Queues", finally Queue.



6.8 ☐ Click " + New Queue"



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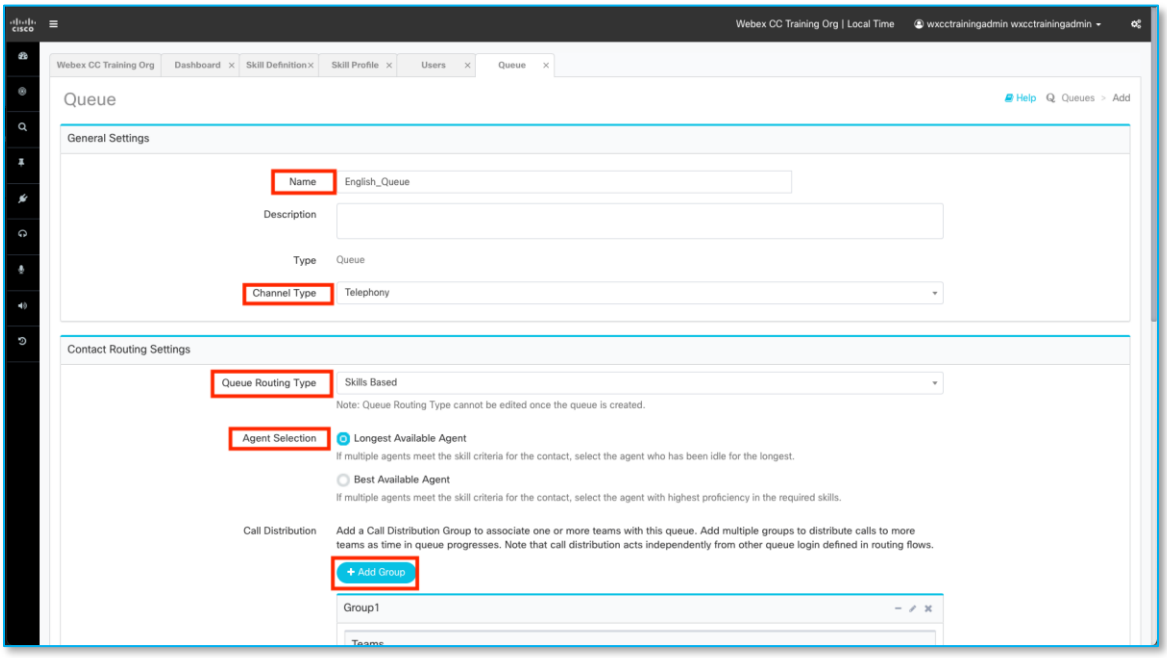
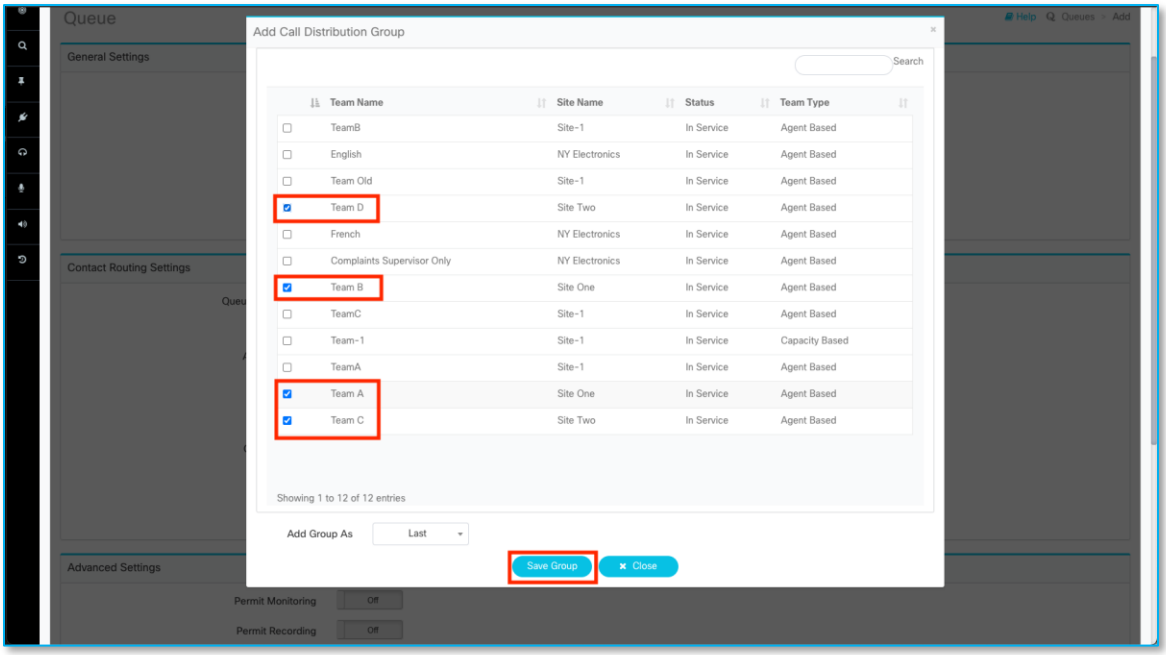
6.8 ☐ Fill in the information as next to the red boxes, then click "+ Add Group".



6.8 ☐ Fill in the information as in the red boxes, then click "Save Group" followed by "Close".



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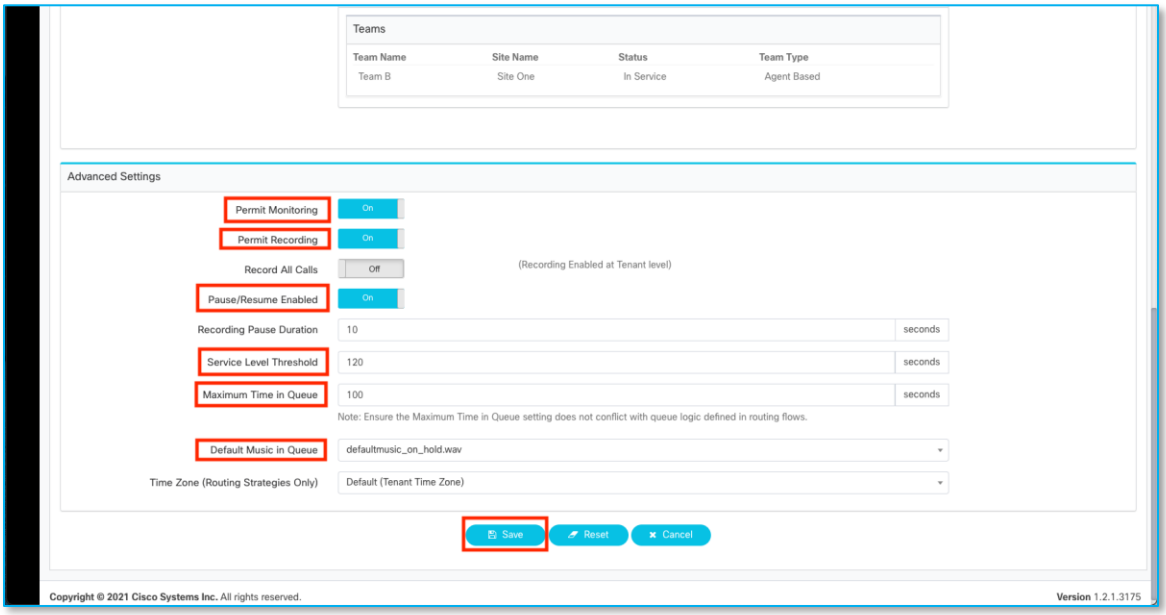
6.6 ☐ Scroll down the page, fill in the information next to the red boxes and then click "Save".



6.7 ☐ Now create 3 more queues as displayed in the table

Name	Channel	Routing Type	Teams	Service Level	Max Time in Queue	Default Music
German_Queue	Telephony	Skill Based – Longest Available	A,B,C,D	120	100	Default_on-hold
English_NonCert	Telephony	Skill Based – Longest Available	A,B,C,D	120	100	Default_on-hold
German_NonCert	Telephony	Skill Based – Longest Available	A,B,C,D	120	100	Default_on-hold

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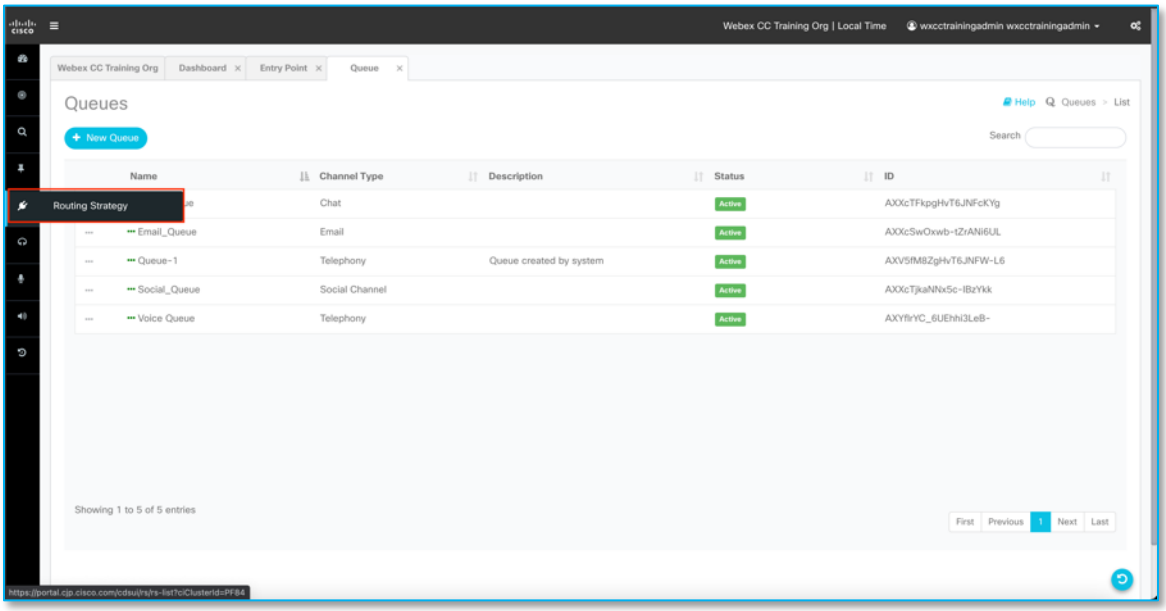
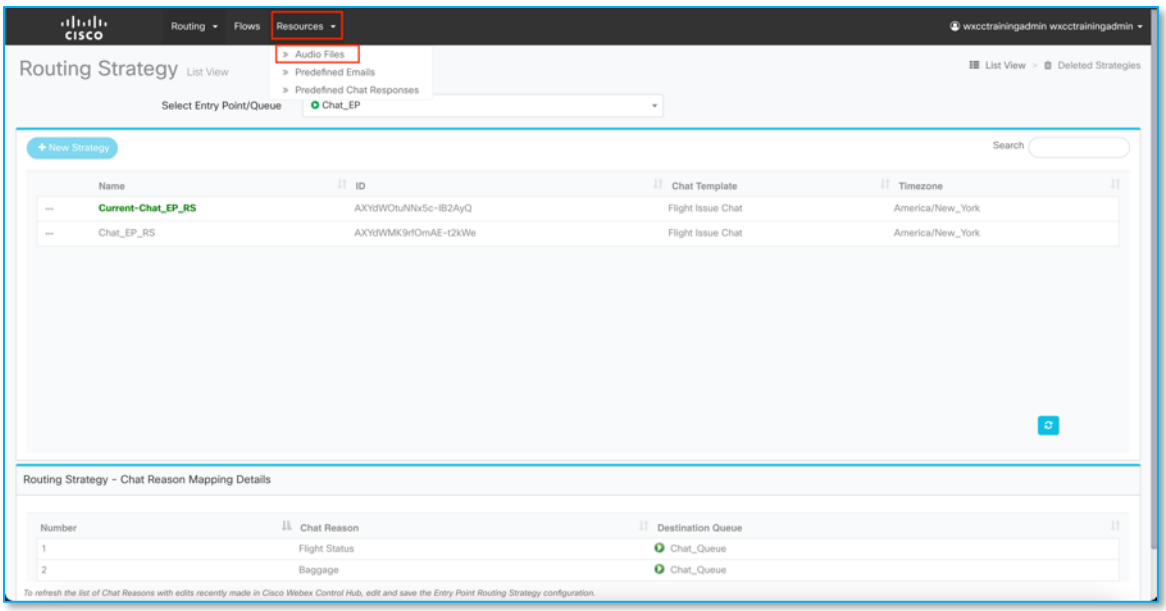
6.8 ☐ Select the “Routing Strategies”.



6.9 ☐ Select the “Resources” dropdown, then “Audio Files”.



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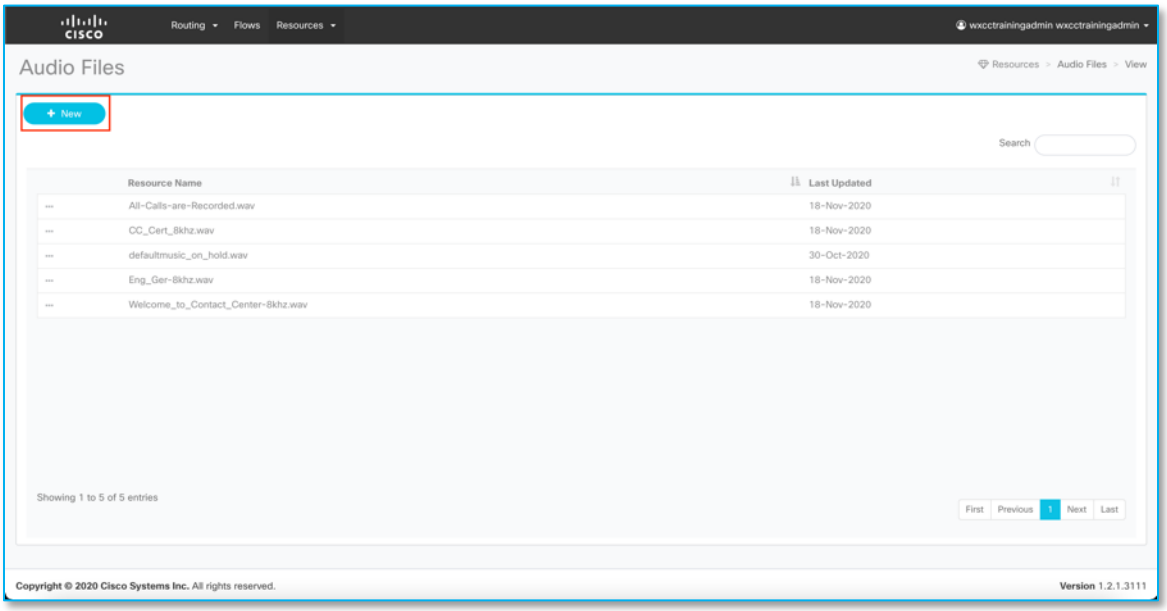
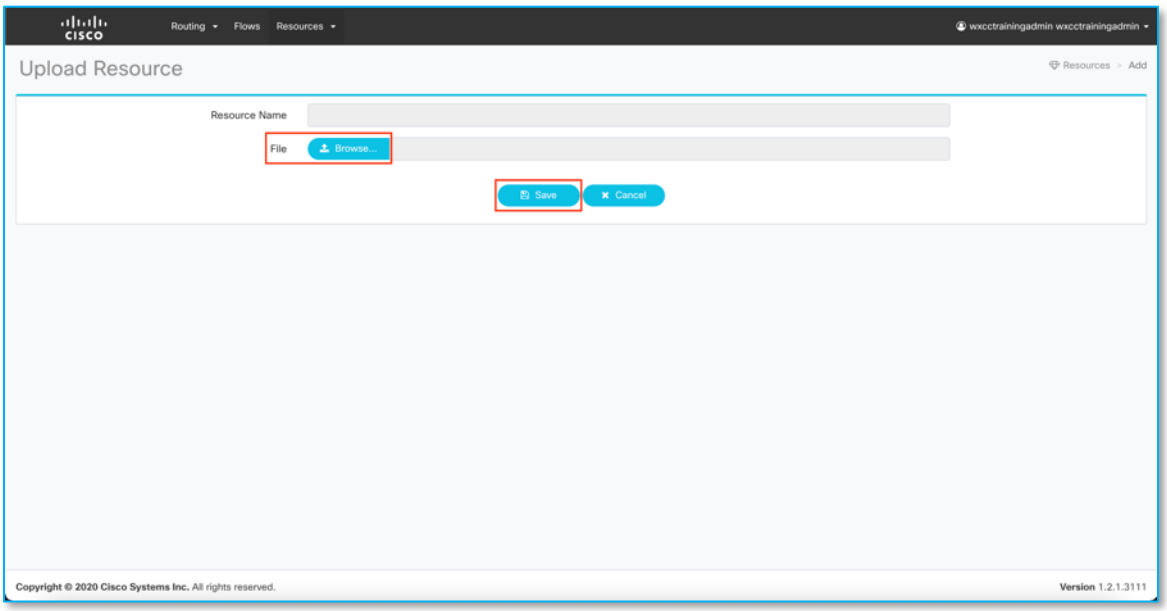
6.10 ☐ Click the " + New" button



6.11 ☐ Click the " Browse" button and search for the All-Calls-Are-Recorded.wav downloaded with the Labs folder at the start of the course. Then click save.



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6.12 ☐ Repeat Steps 6.8 and 6.9 for all of the following files: -

CC_Cert_8khz.wav
Eng_Ger-8khz.wav
Shut.wav
Welcome_to_Contact_Center-8khz.wav

STOP! ***Please do not proceed until instructed to do so.***

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7 Lab 7 – Provisioning a Flow

Purpose: Provisioning a flow

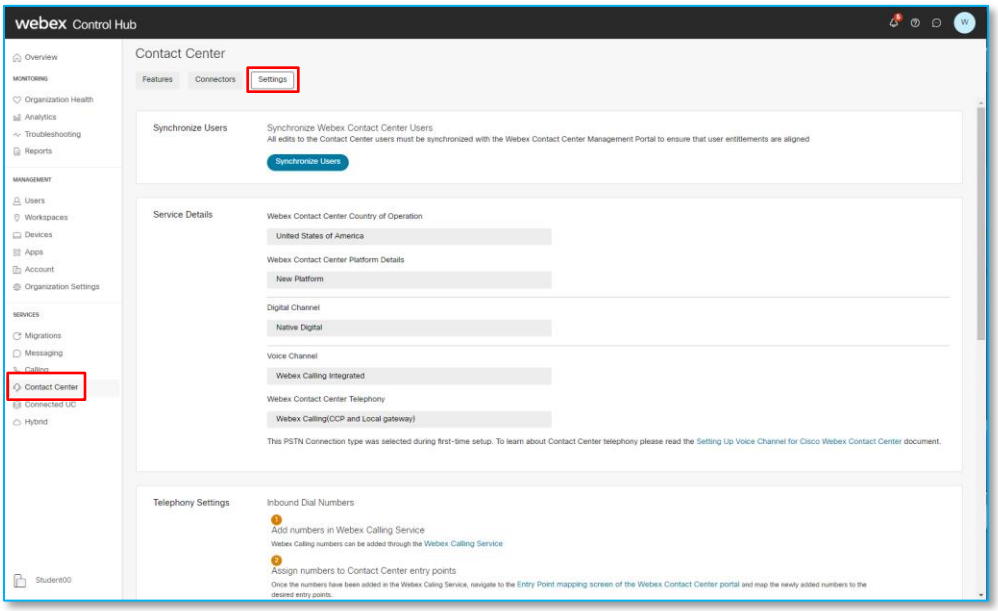
Expected Completion Time: 30 minutes.

Provisioning a Tenant under the main Service Provider

7.1 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

7.2 ☐ Once logged in, click "Contact Center" (under Services), then "Settings", as indicated in the following picture.



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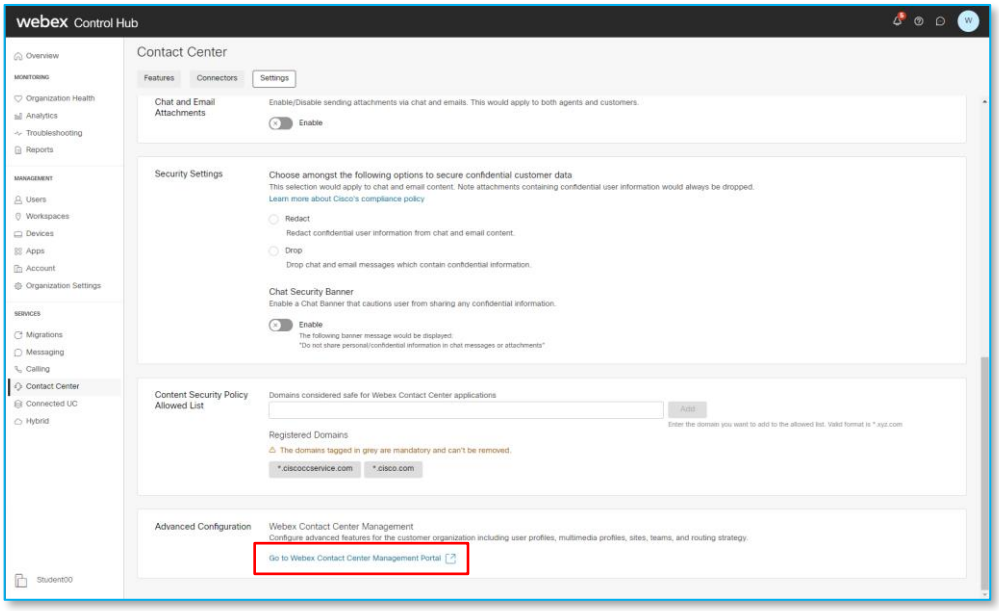
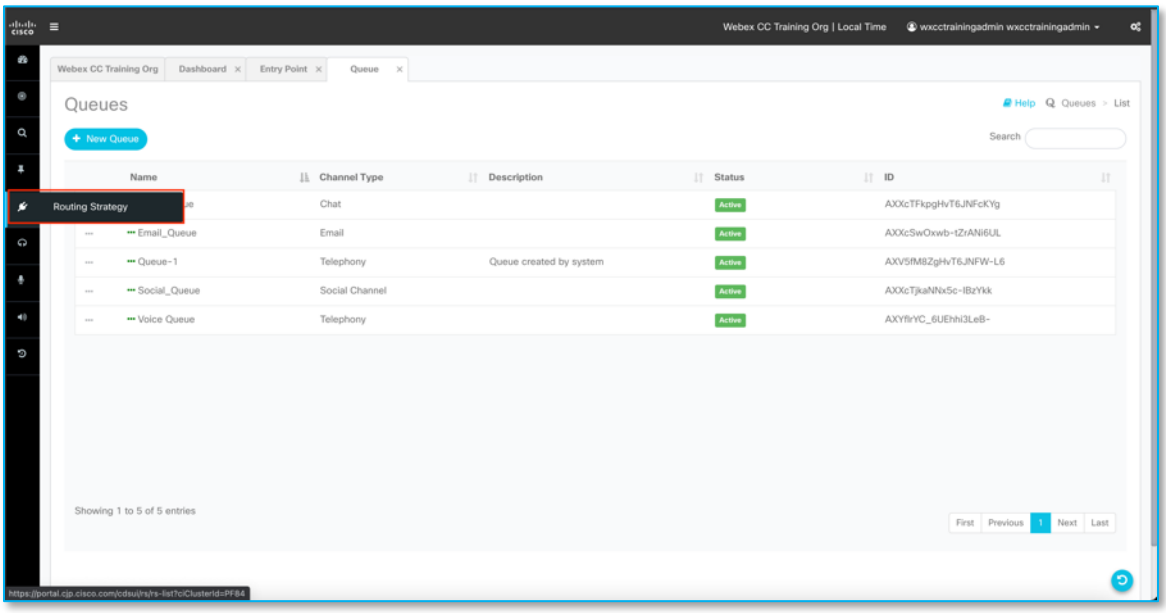
7.3 ☐ Click the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



7.4 ☐ Select the "Routing Strategy" icon.



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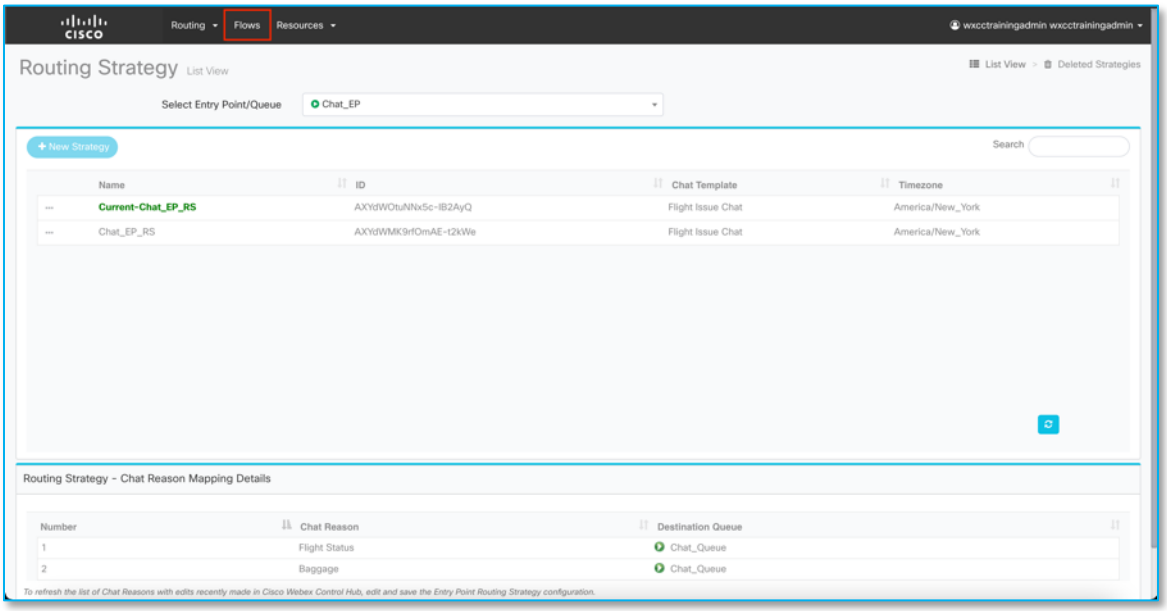
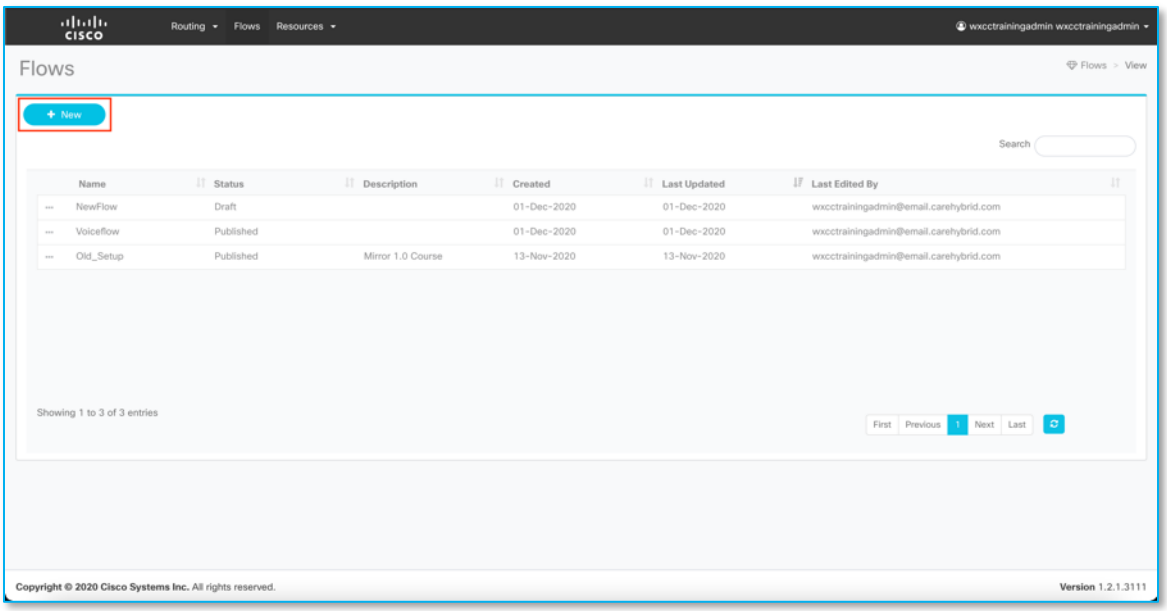
7.5 ☐ Click the "Flows" button.



7.6 ☐ Select the "+ New" icon.



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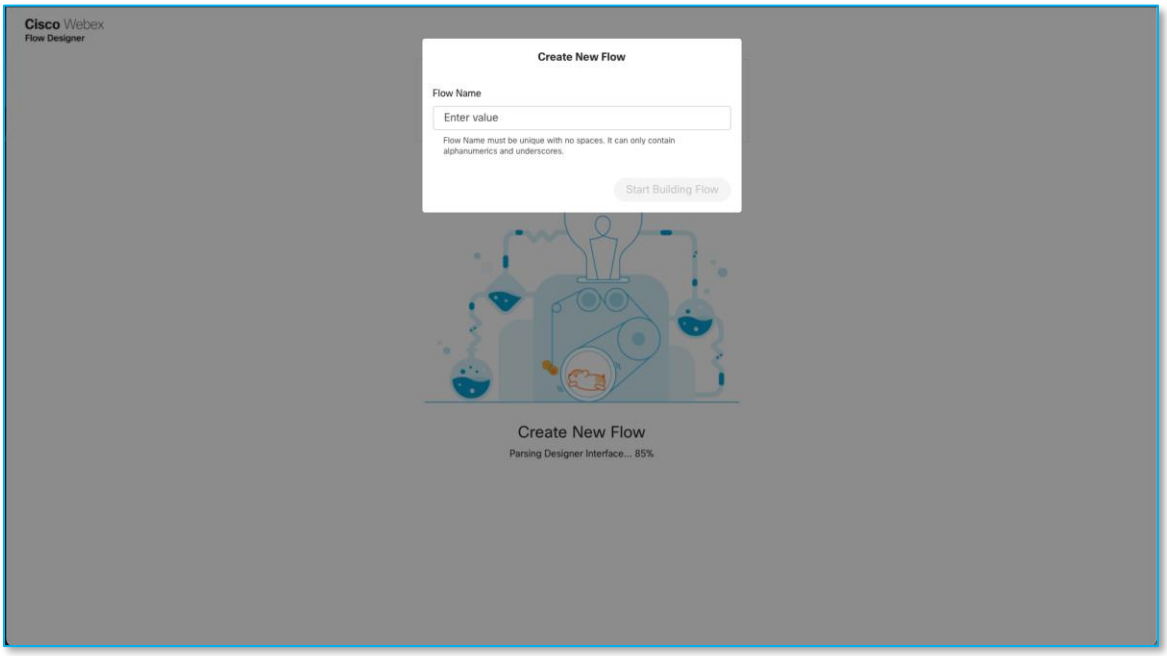
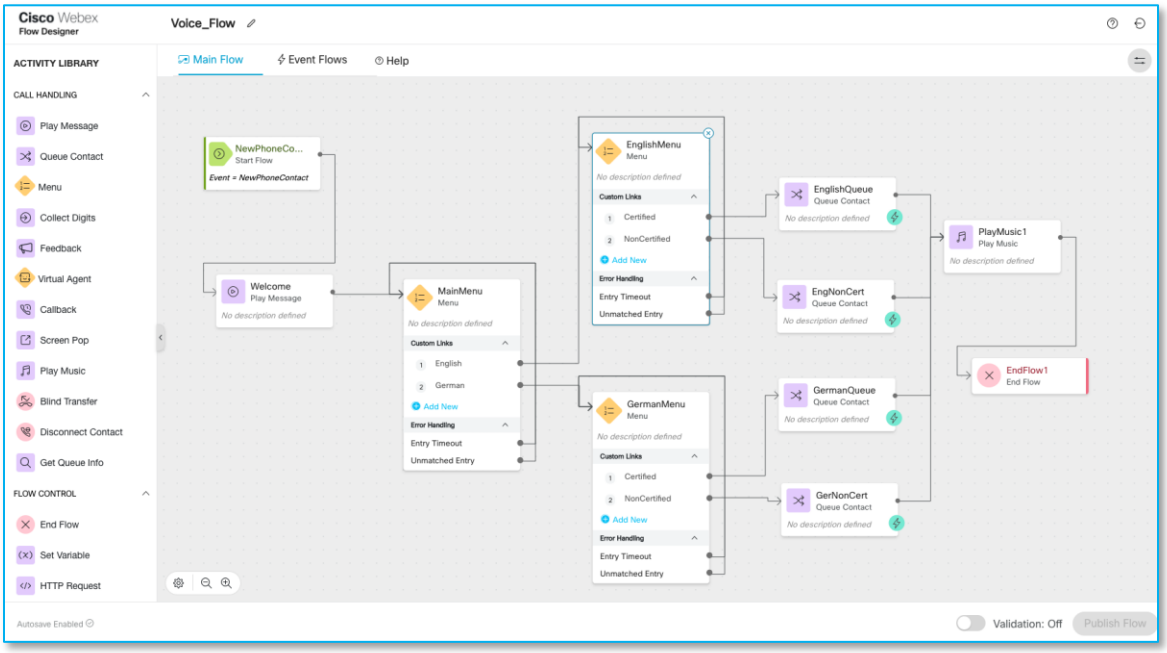
7.7 ☐ Enter in the Name “VoiceFlow”



7.8 ☐ Drag and drop the icons to create the following image.



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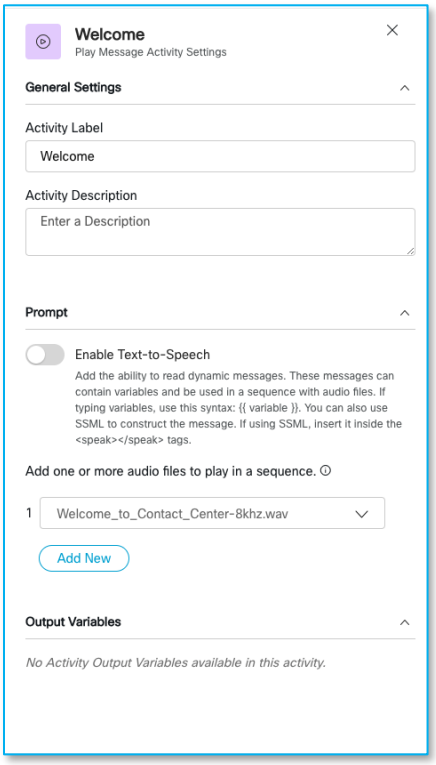
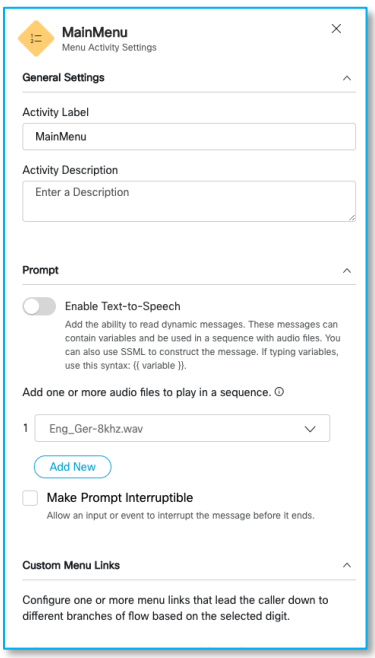
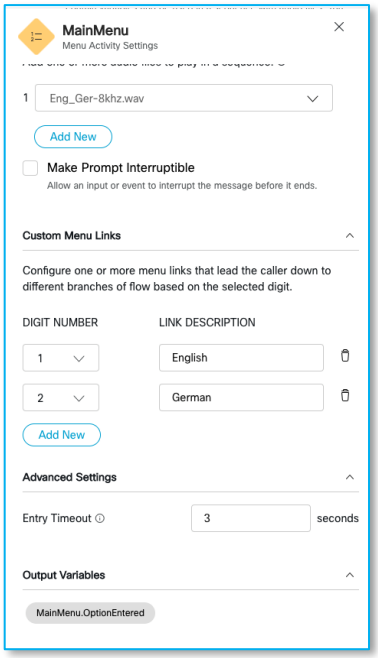
7.9 ☐ Click on the "PlayMessage" Icon and change the settings to match what is shown below.



7.10 ☐ Click on the "Menu1" Icon and change the settings to match what is shown below.





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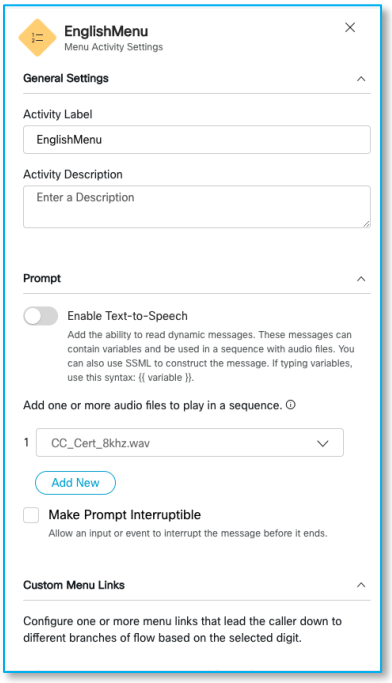
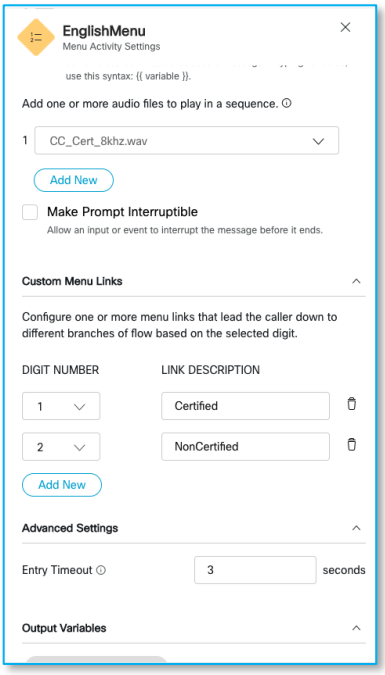
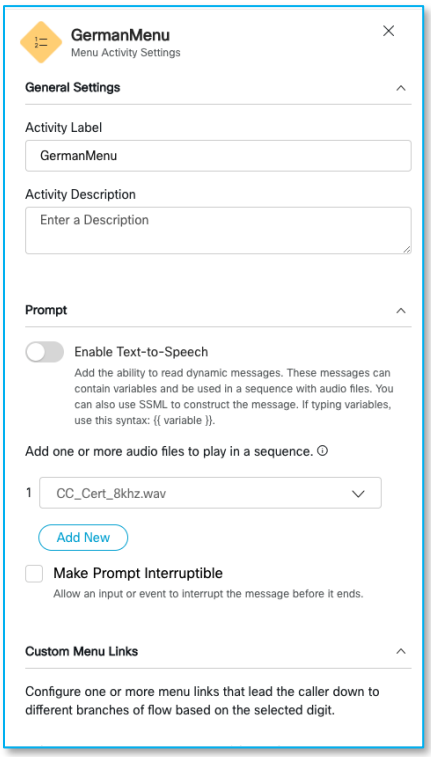
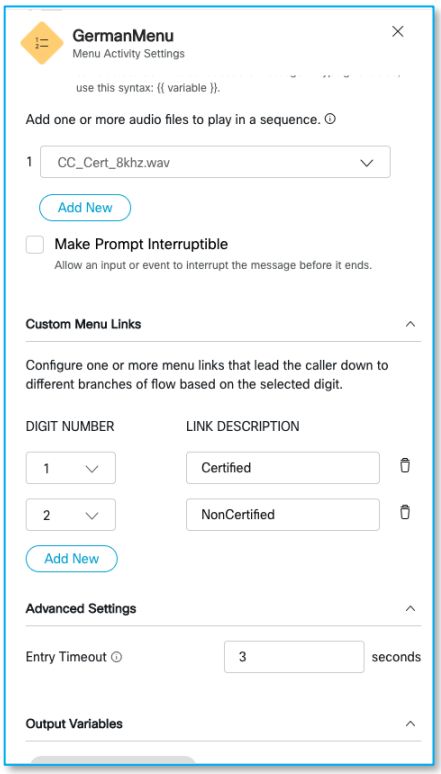
7.11 ☐ Click on the "Menu2" Icon and change the settings to match what is shown below.





7.12 ☐ Click on the "Menu3" Icon and change the settings to match what is shown below.





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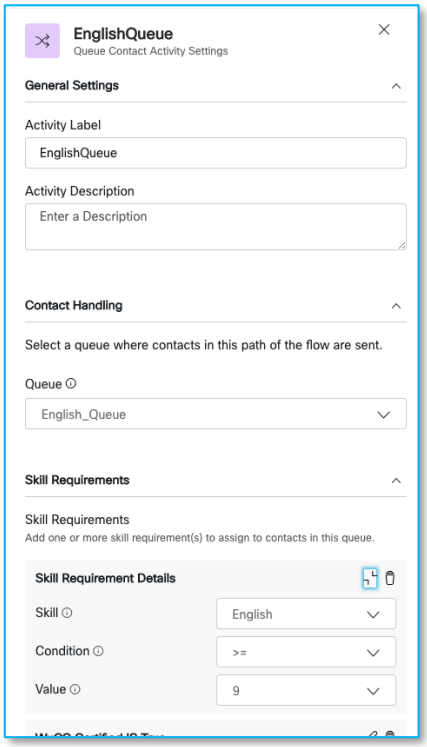
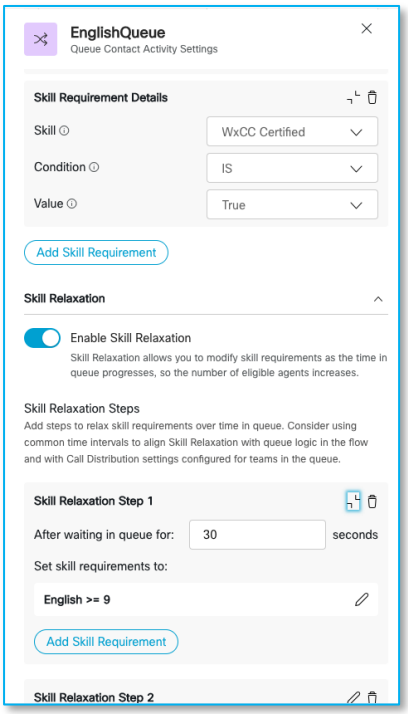
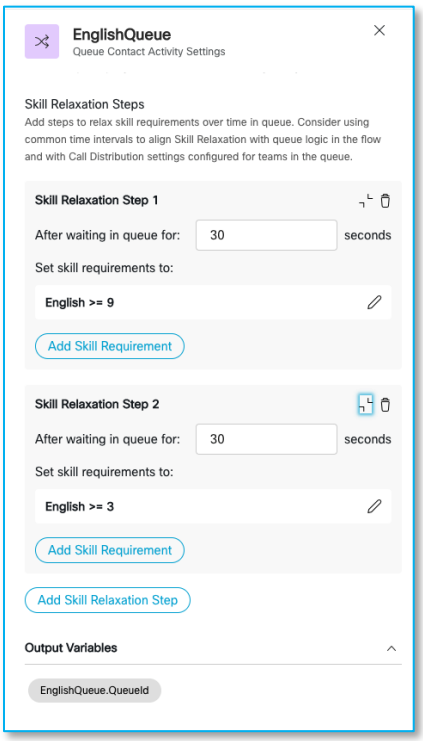
7.13 ☐ Click on the "QueueContact1" Icon and change the settings to match what is shown below.







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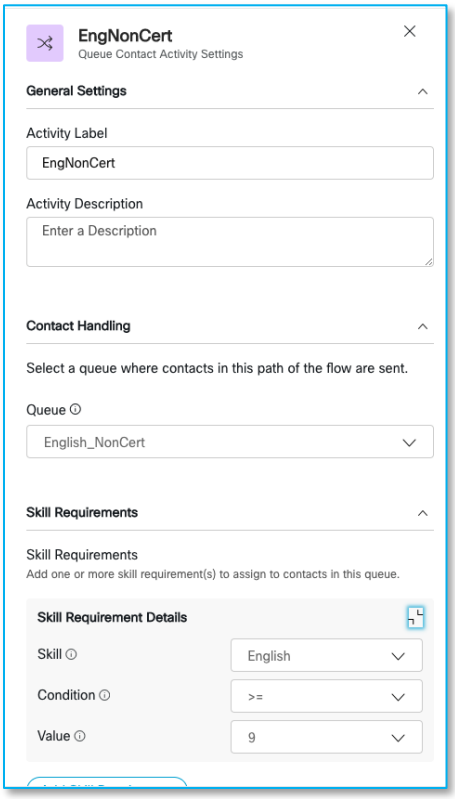
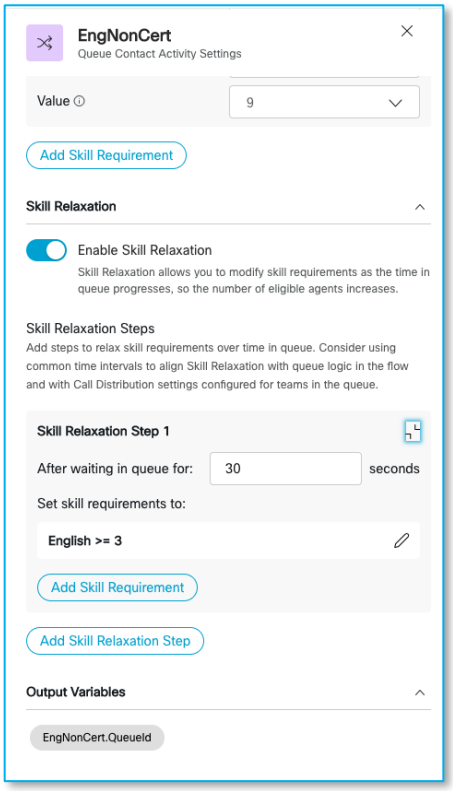
7.14 ☐ Click on the "QueueContact2" Icon and change the settings to match what is shown below.





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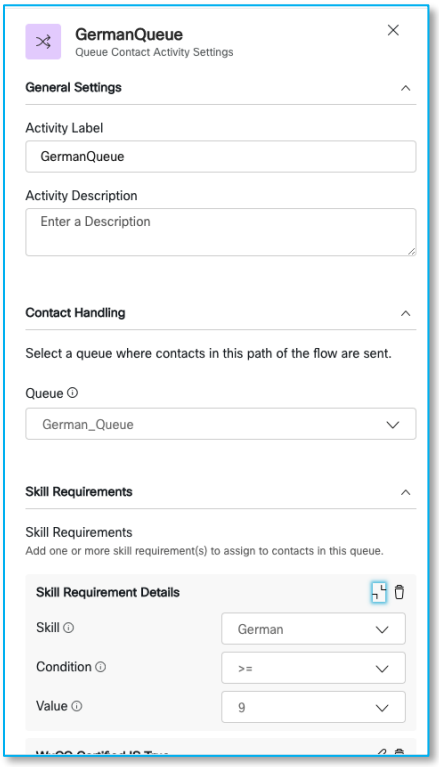
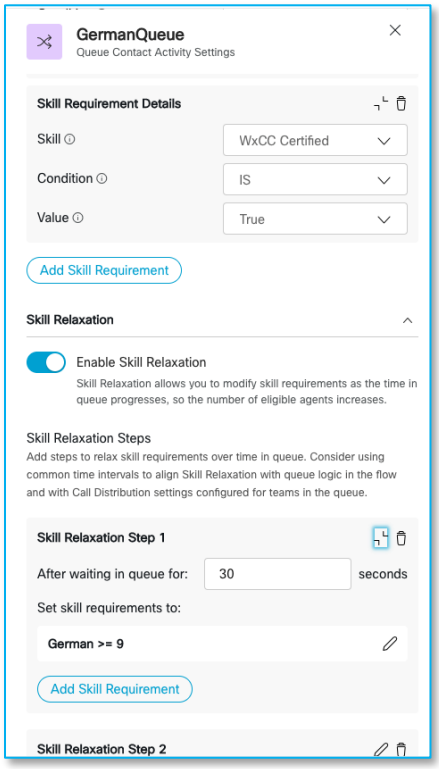
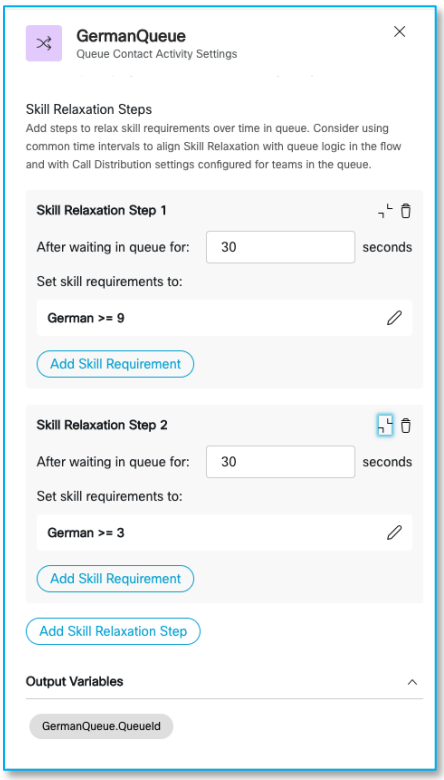
7.15 ☐ Click on the "QueueContact3" Icon and change the settings to match what is shown below.







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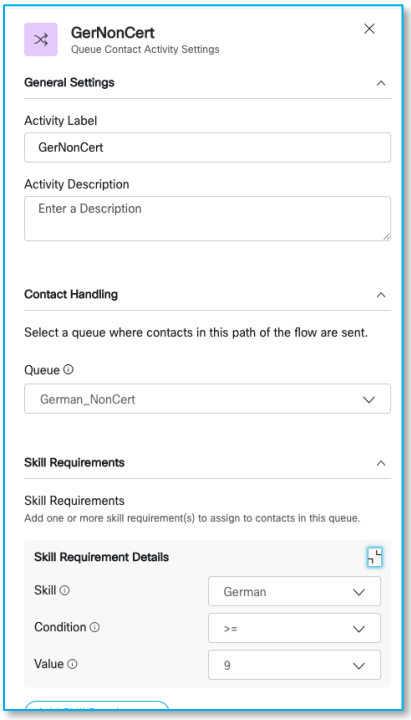
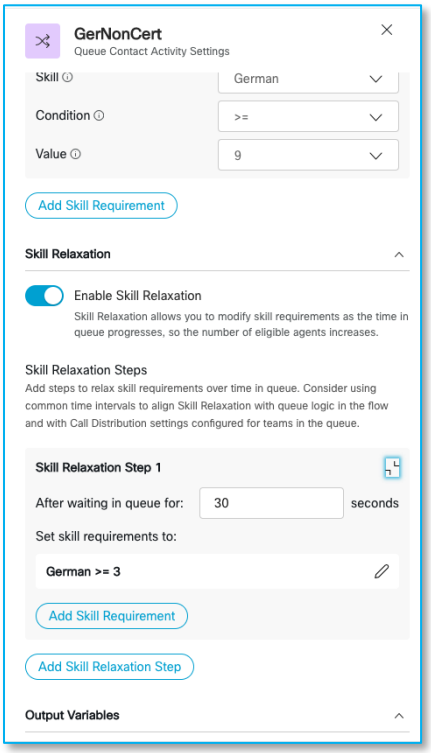
7.16 ☐ Click on the "QueueContact4" Icon and change the settings to match what is shown below.





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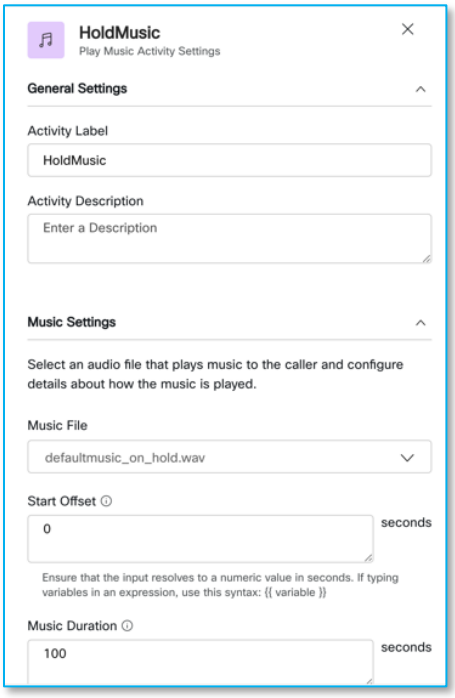
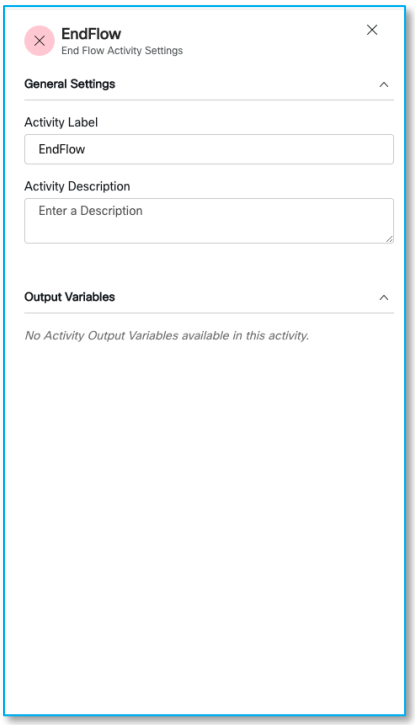
7.17 ☐ Click on the "PlayMusic1" Icon and change the settings to match what is shown below.



7.18 ☐ Click on the "EndFlow1" Icon and change the settings to match what is shown below.



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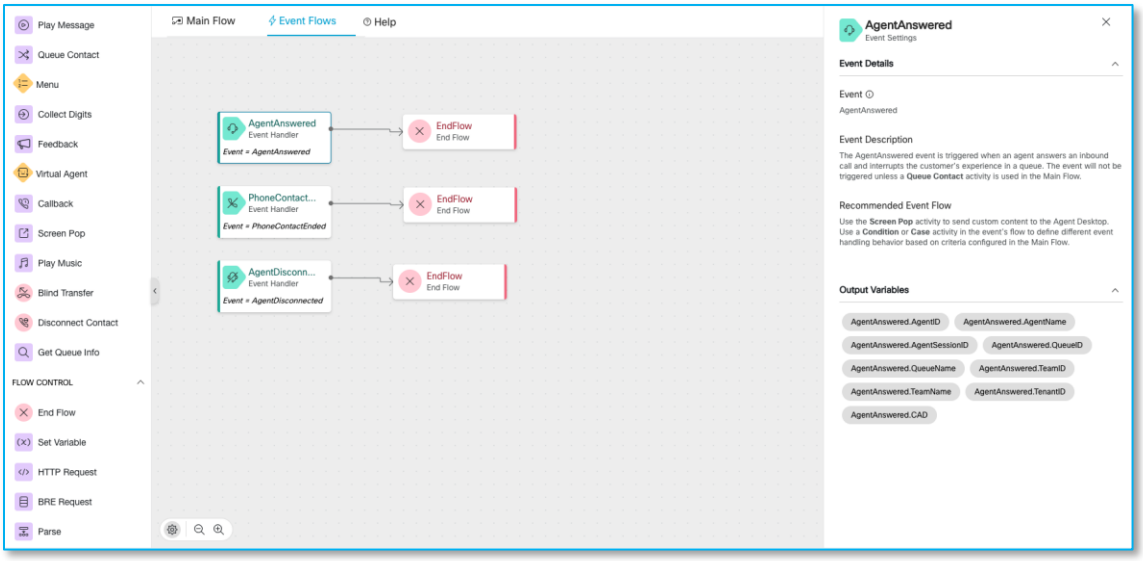
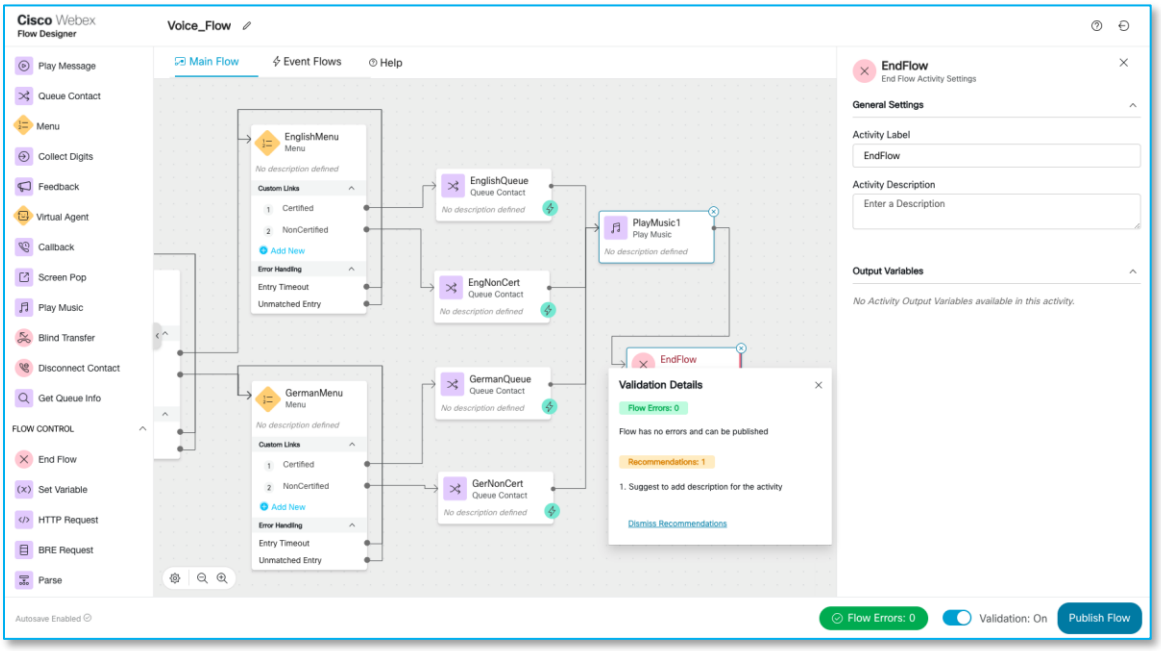
7.19 ☐ Click on the "Event Flows" Icon and drag in the icons to match what is shown below. Then click back to "Main Flow"



7.20 ☐ Turn on the "Validation" switch, confirm no errors and then publish the Flow.



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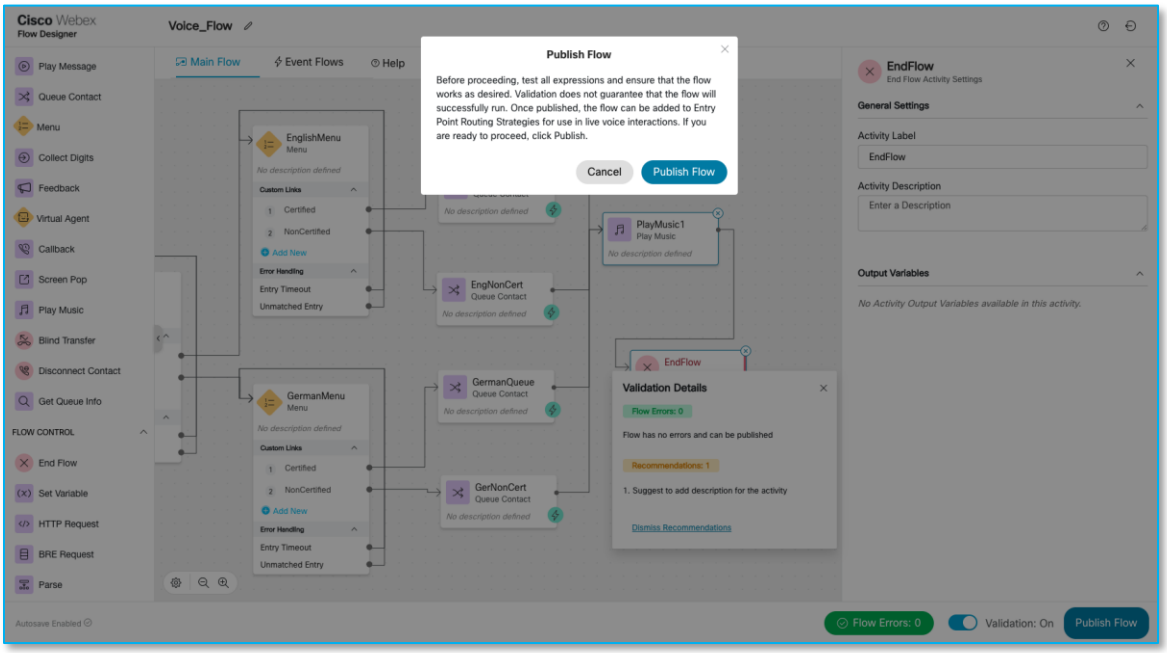
7.21 ☐ Click “Publish Flow”



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8 Lab 8 – Entry Point and Queue Routing Strategies, DN to EP Mapping

Purpose: Entry Point and Queue Routing Strategies, DN to EP Mapping

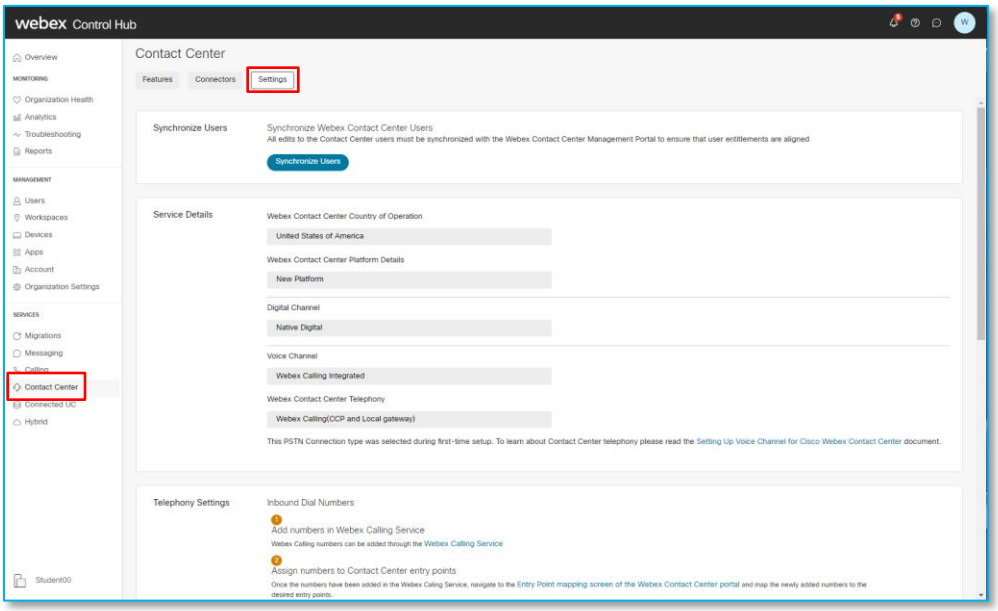
Expected Completion Time: 30 minutes.

Provisioning a Tenant under the main Service Provider

8.1 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

8.2 ☐ Once logged in, click "Contact Center" (under Services), then "Settings", as indicated in the following picture.



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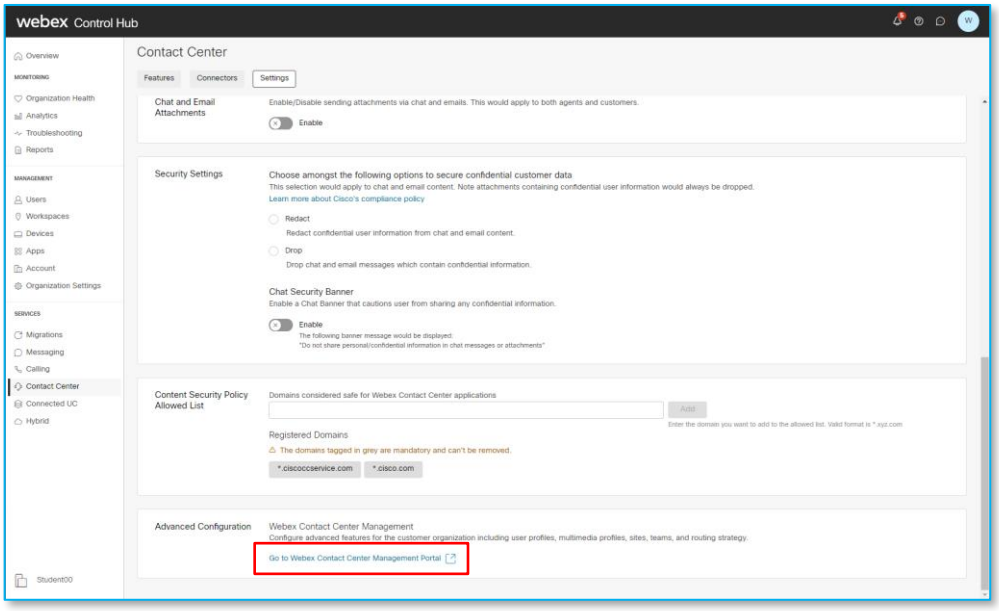
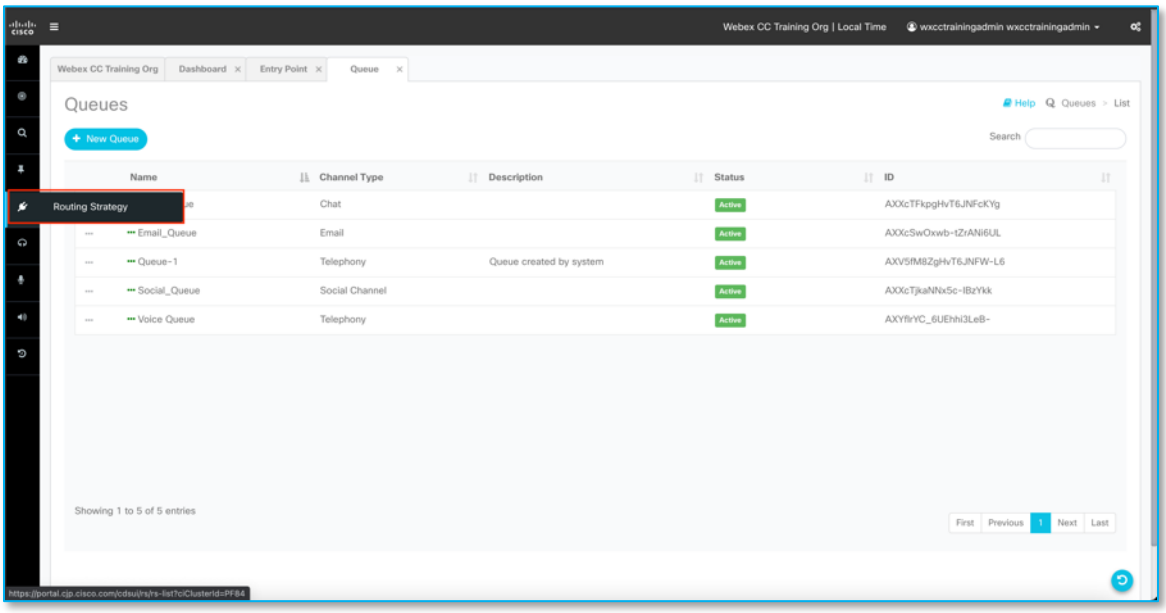
8.3 ☐ Click the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



8.4 ☐ Select the "Routing Strategy" icon.



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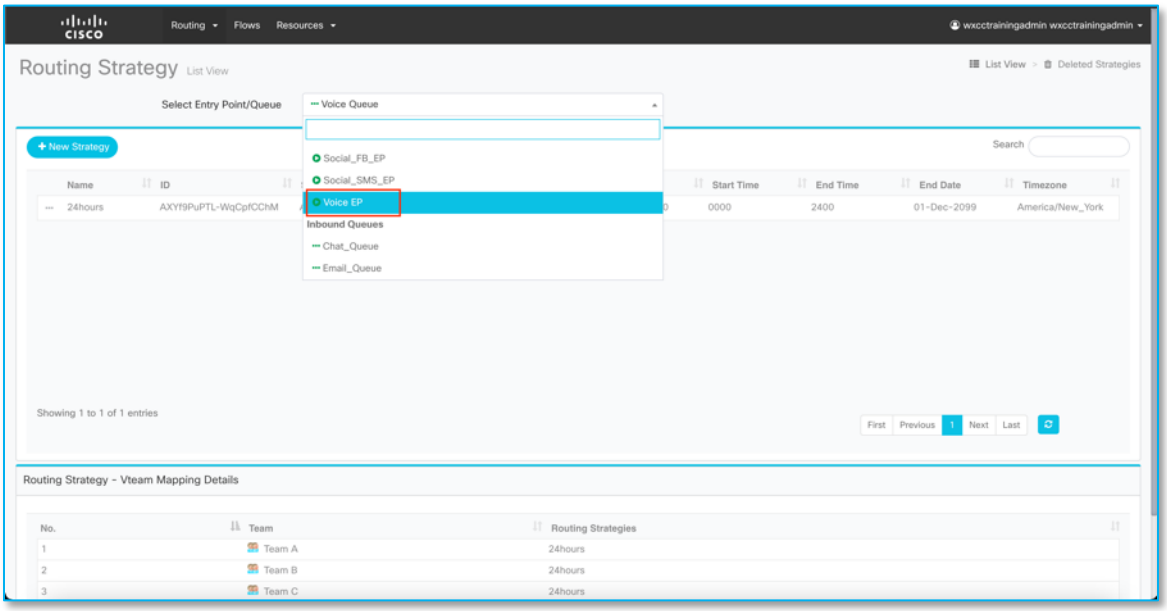
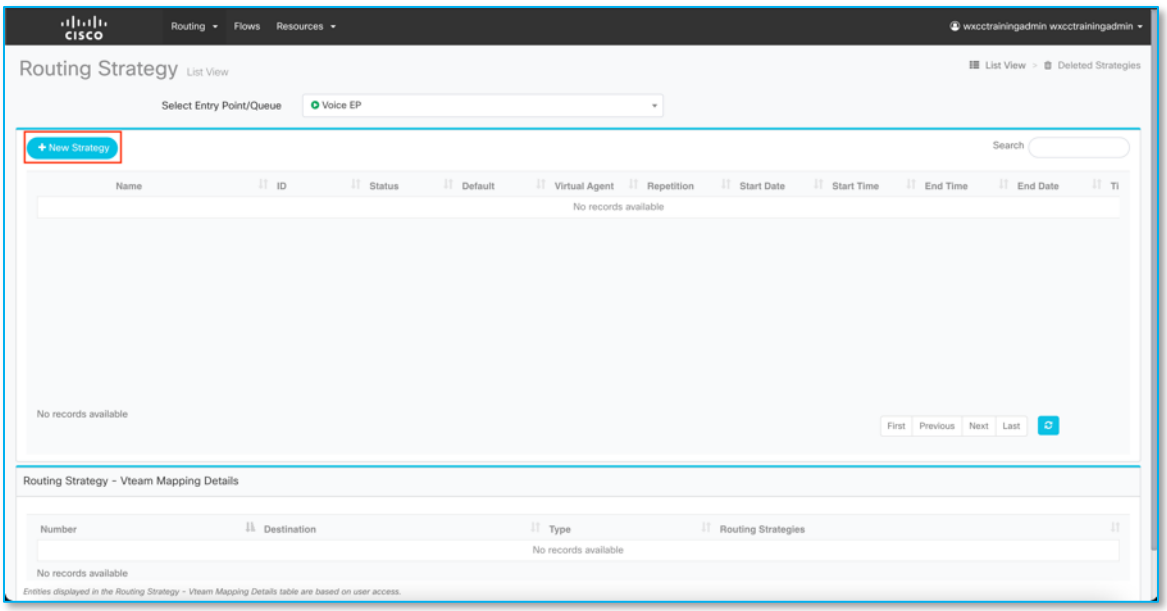
8.5 ☐ Select the “Voice EP” from the drop down list.



8.6 ☐ Click the “ + New Strategy” icon.



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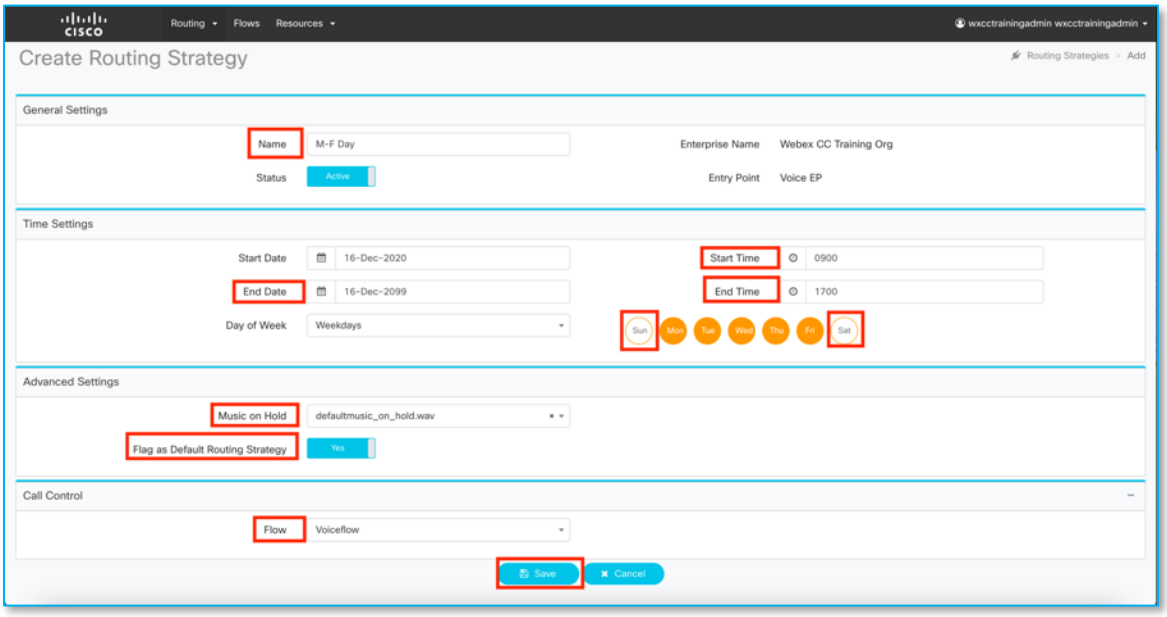
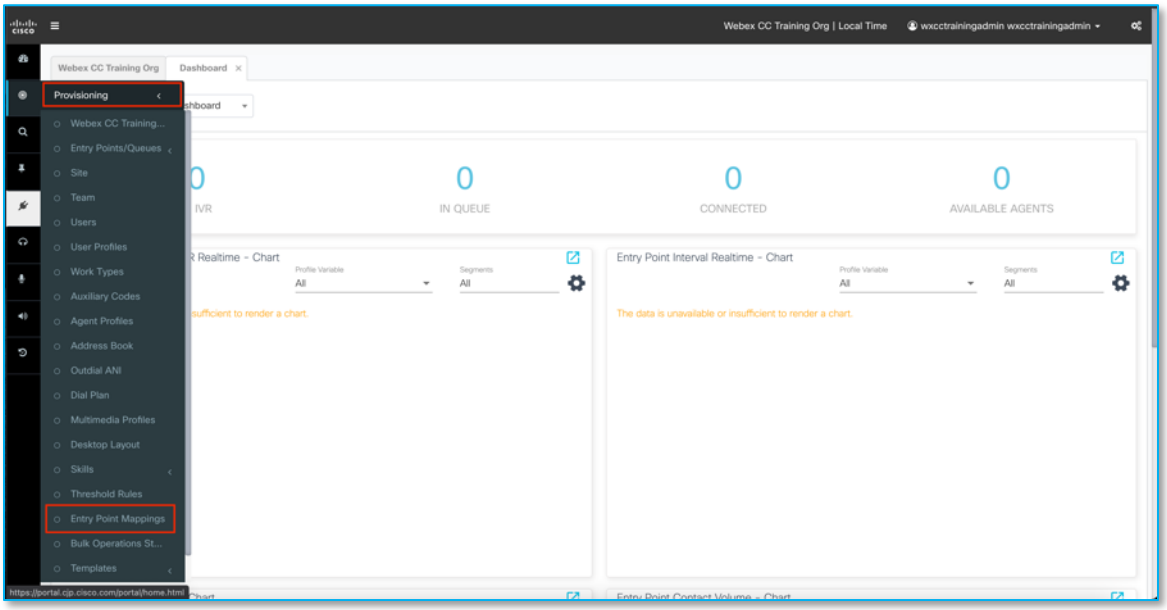
8.7 ☐ **Fill in the information as next to the red boxes, then click save.**



8.8 ☐ **Create an Out of Hours Flow that plays a message saying the contact centre is shut and then hangs up. Apply it to a Night Routing Strategy and a Weekend Routing Strategy. – Hint you have to create all of these things yourselves.**

8.9 ☐ **Select the "Provisioning" icon and then select "Entry Point Mappings".**



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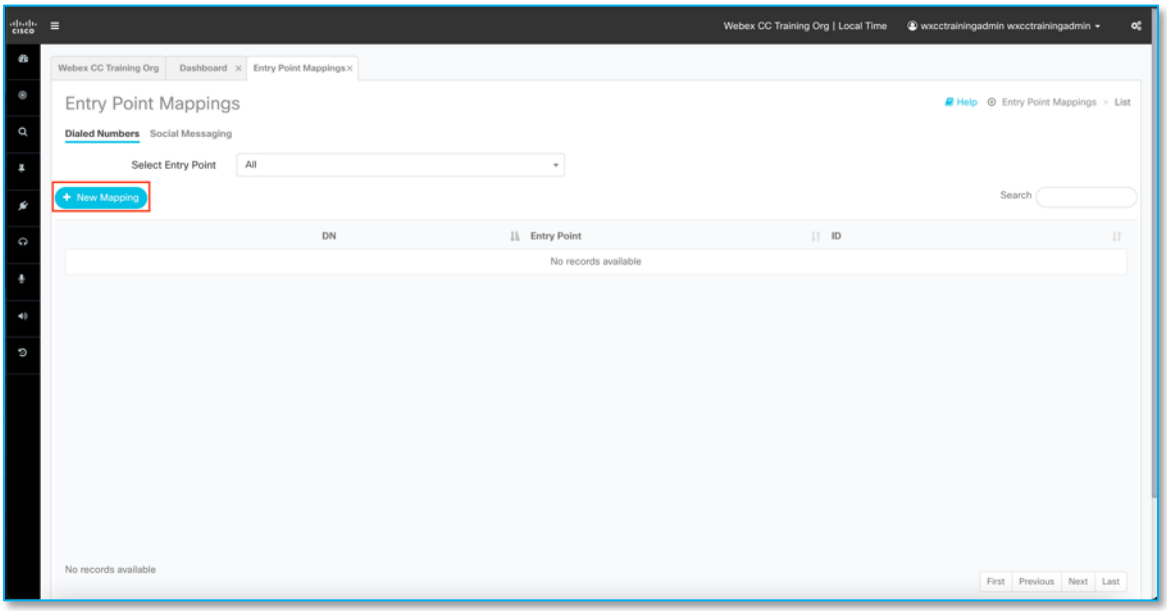
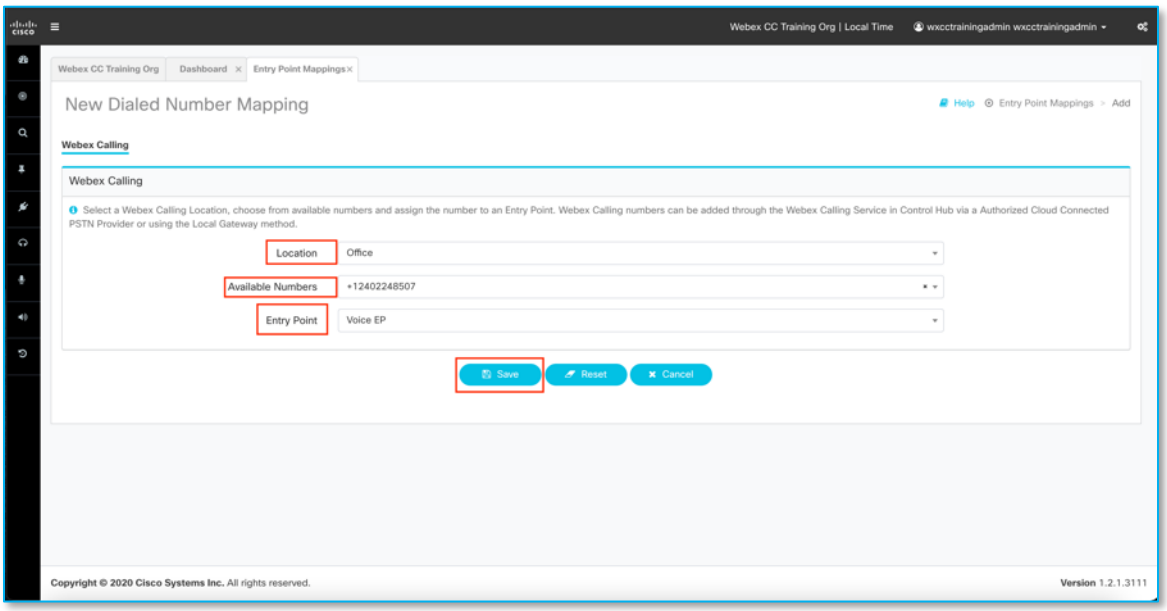
8.10 ☐ Click the " + New Mapping" icon.



8.11 ☐ Fill in the information as next to the red boxes, using the number available to you, then click save.



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9 Lab 9 – Queues and Routing Design Solution

Purpose: Design a working solution for a given example

Expected Completion Time: 30 minutes.

Design a Solution for the following Customer on a piece of paper

9.1 ☐ You have received a call from "Billie Joe Real Estate". They have a central call center which receives calls about from a large selection of customers. They have decided to go with the WXCC solution and have sent you an email with the particulars of the way their current system runs. Your job is to design the call flow for this customer.

Hello Cisco,

This our call flow breakdown as requested, if you could match it that would be sweet!!

Calls come into our Main Auto Attendant and depending on the time get answered as follows:-

0900hrs to 1730hrs these options play

1. General Queue
2. Billing Queue
3. Real Estate Queue
4. Emergency Queue

* Repeat Menu

01730hrs to 0900hrs these options play

1. Emergency Queue
2. Leave a voicemail on 2406569987

We have 4 groups of agents, General, Billing, Real Estate and Emergency.

The General, Billing and Real Estate queues all play our Music on Hold, with a repeating message every minute saying we are sorry they are waiting. They are answered by the longest available agent and never leave the Queue.

The Emergency Queue does the same during the day, but at night we stack up any calls (still playing MOH and Comfort message) and only deliver one at a time to our duty Cell phone (2406768876).

Regards
Billy Joe

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10 Lab 10 – Setting up a Call Monitoring Schedule and a Call Recording Schedule

Purpose: Entry Point and Queue Routing Strategies, DN to EP Mapping

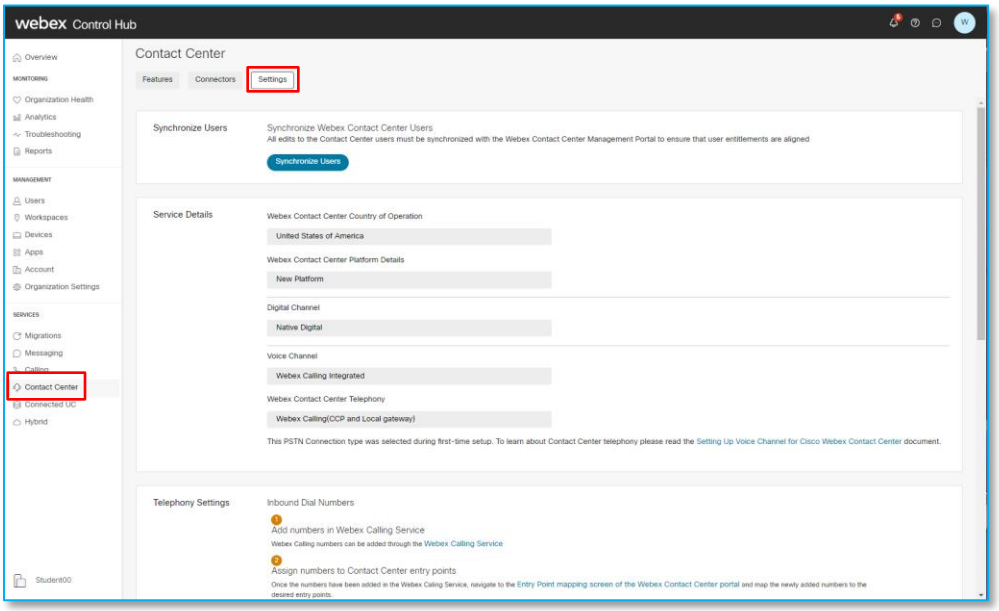
Expected Completion Time: 30 minutes.

Provisioning a Tenant under the main Service Provider

10.1 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

10.2 ☐ Once logged in, click "Contact Center" (under Services), then "Settings", as indicated in the following picture.



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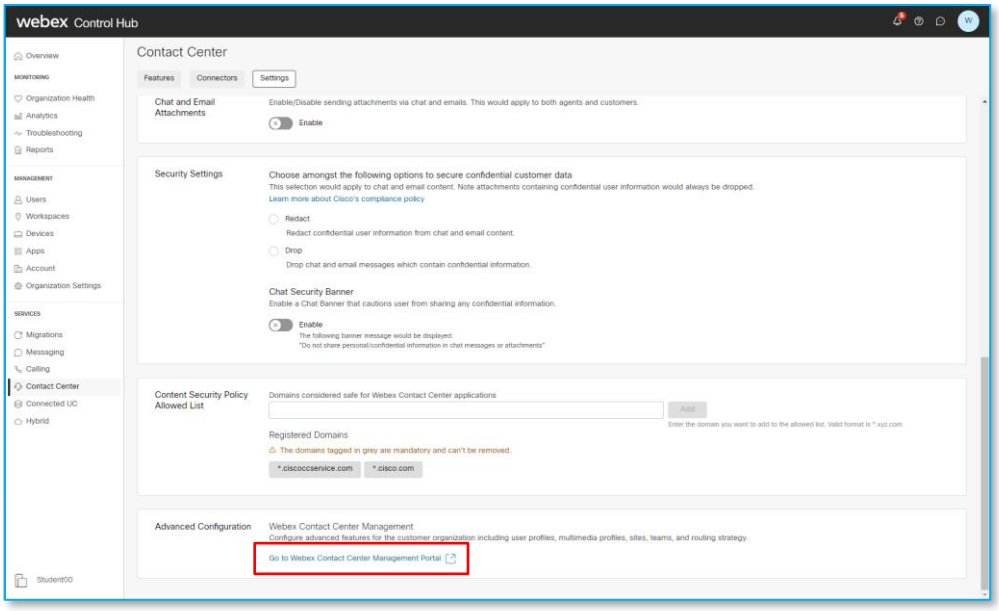
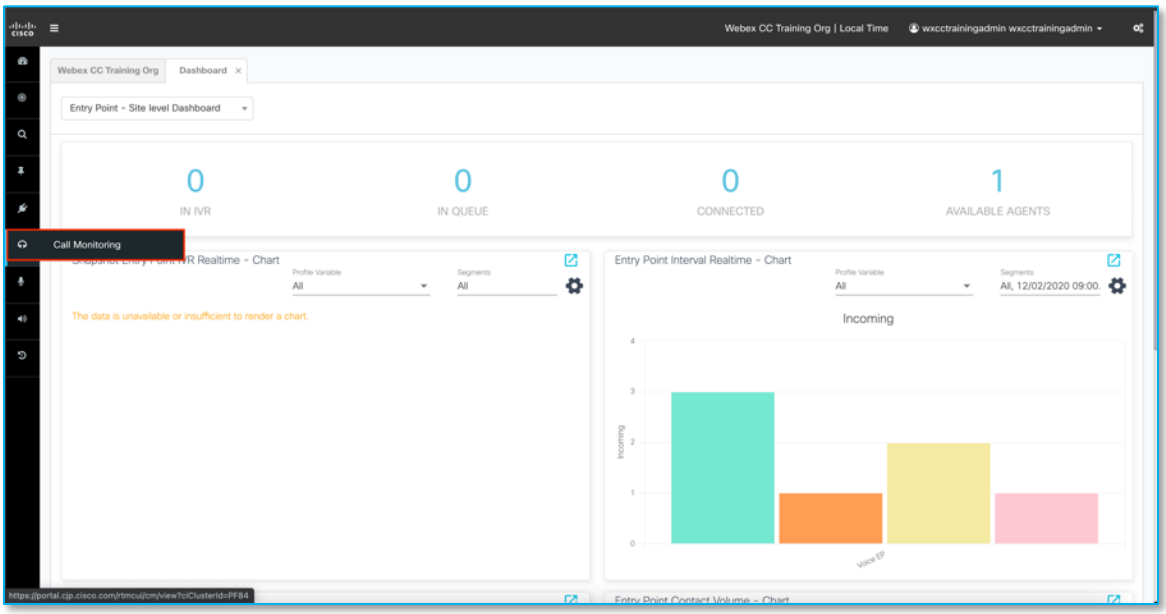
10.3 ☐ Click the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



10.4 ☐ Select the "Call Monitoring" icon.



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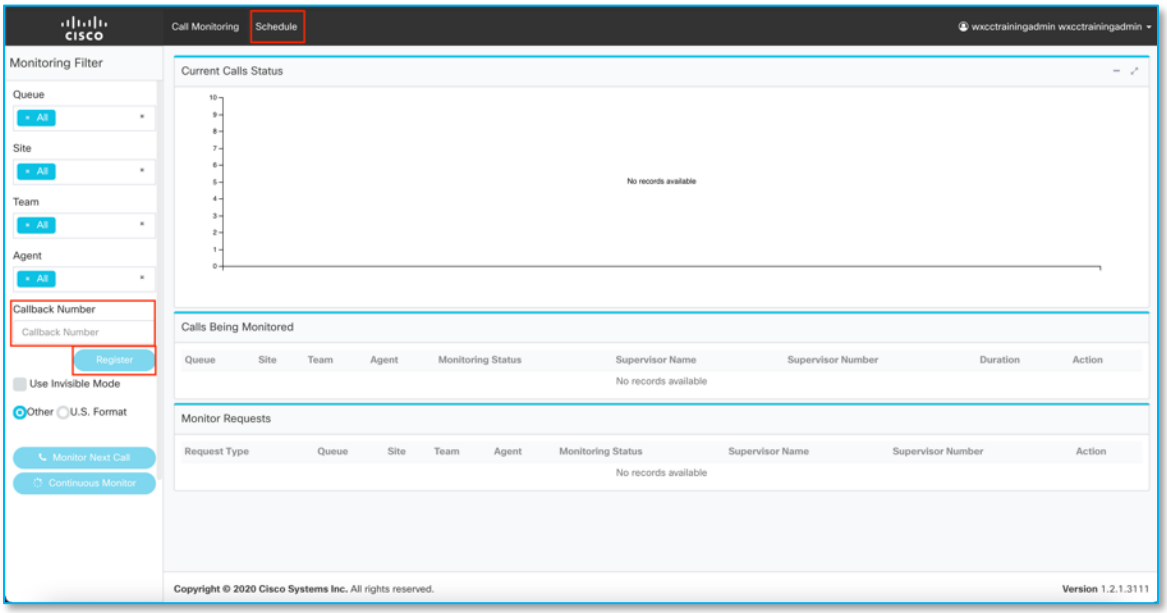
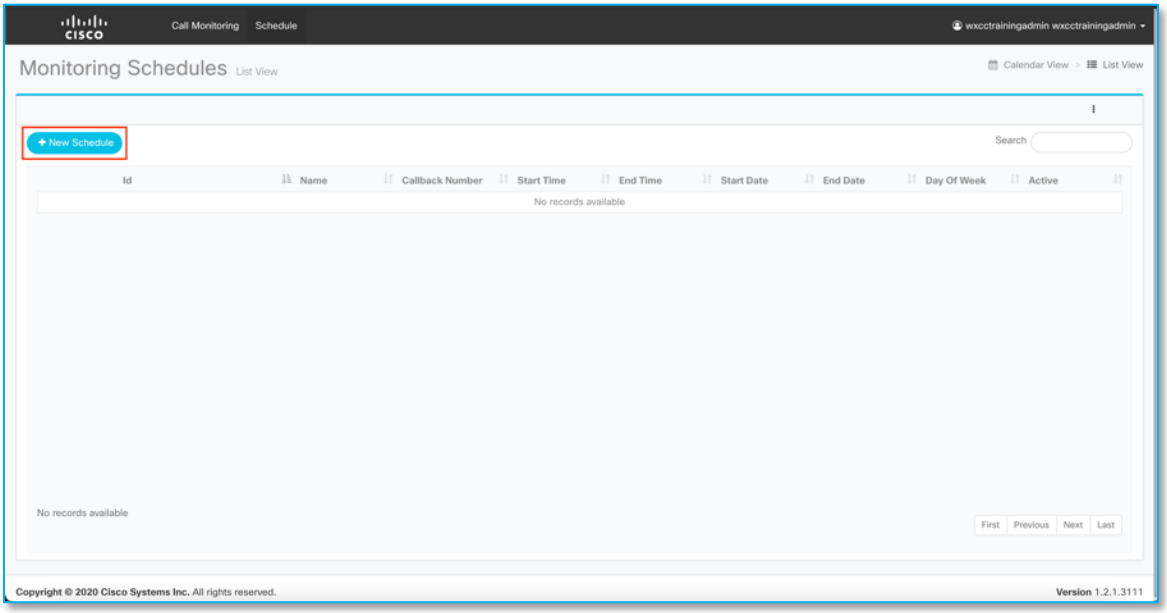
10.5 ☐ Enter a callback number, hit register, then select Schedule.



10.6 ☐ Select List View then click "+ New Schedule"



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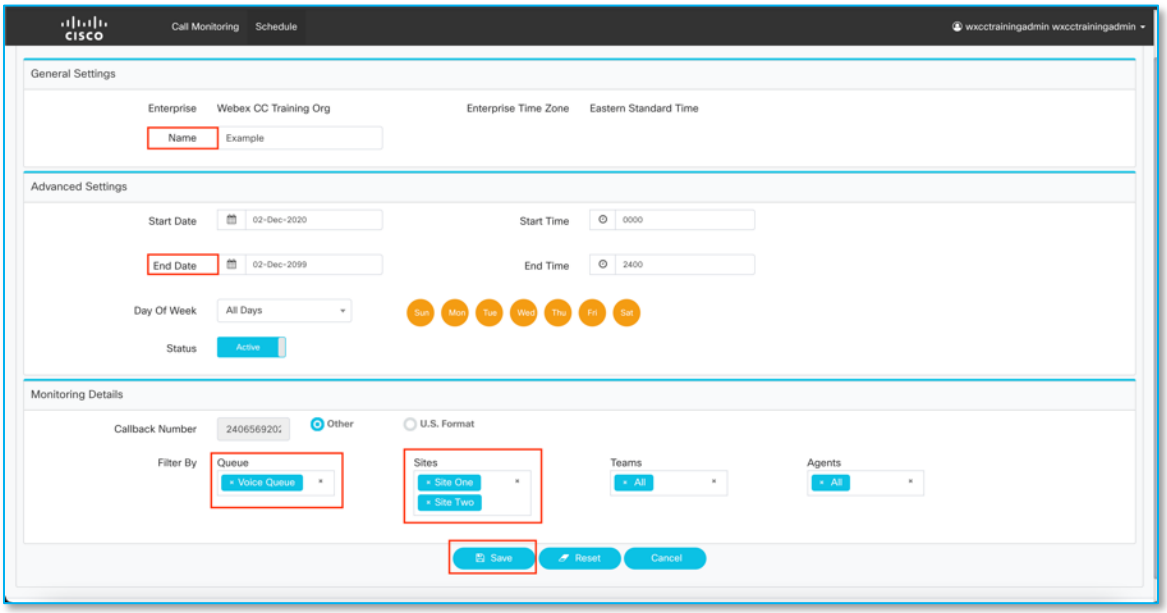
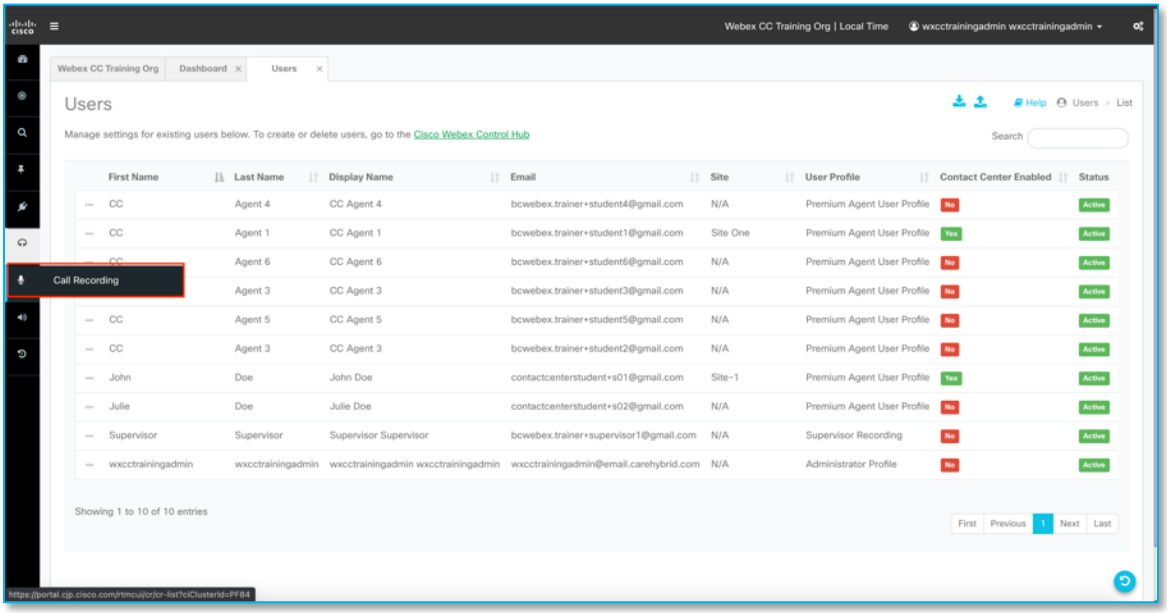
10.7 ☐ Fill in the information as next to the red boxes, then click save.



10.8 ☐ Select the "Call Recording" icon.



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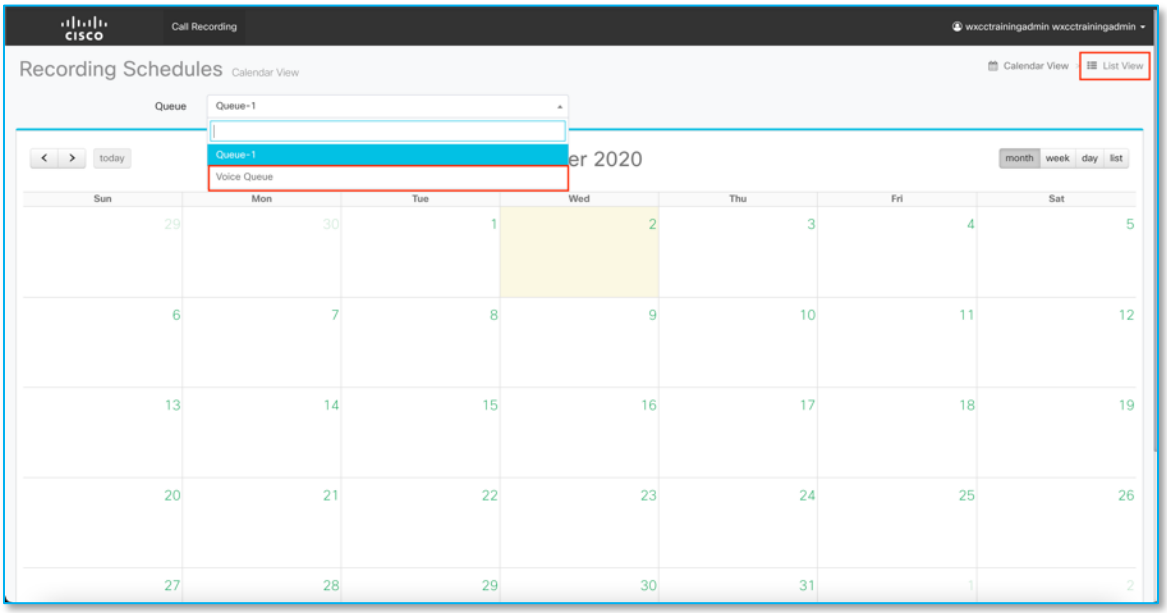
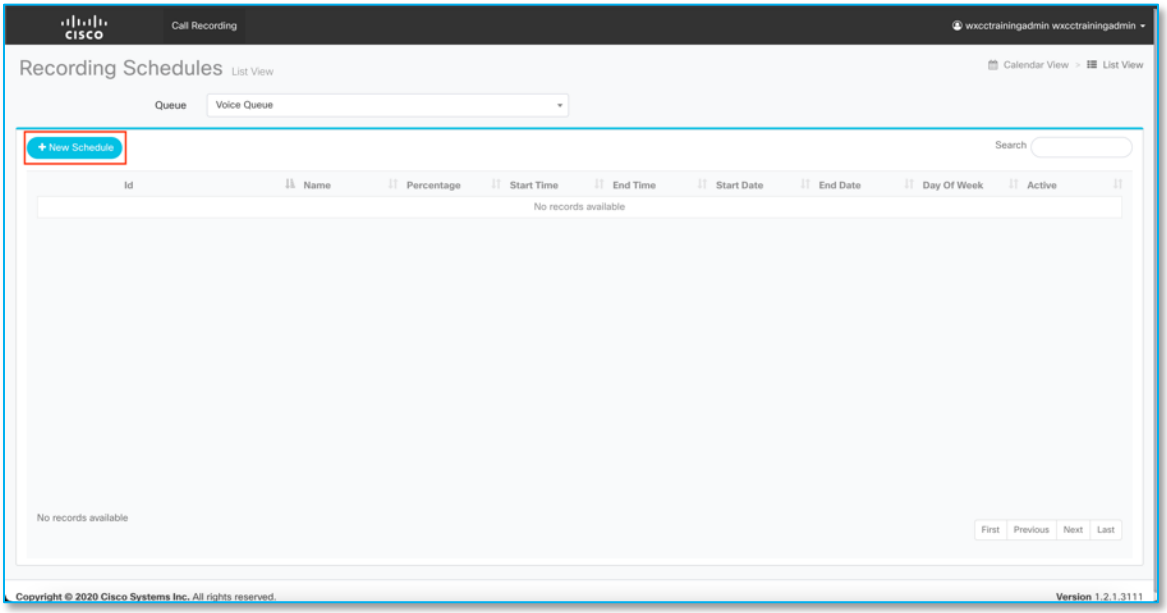
10.9 ☐ Select the "Voice Queue" from the drop down list, then select List View.



10.10☐ Click "+ New Schedule"



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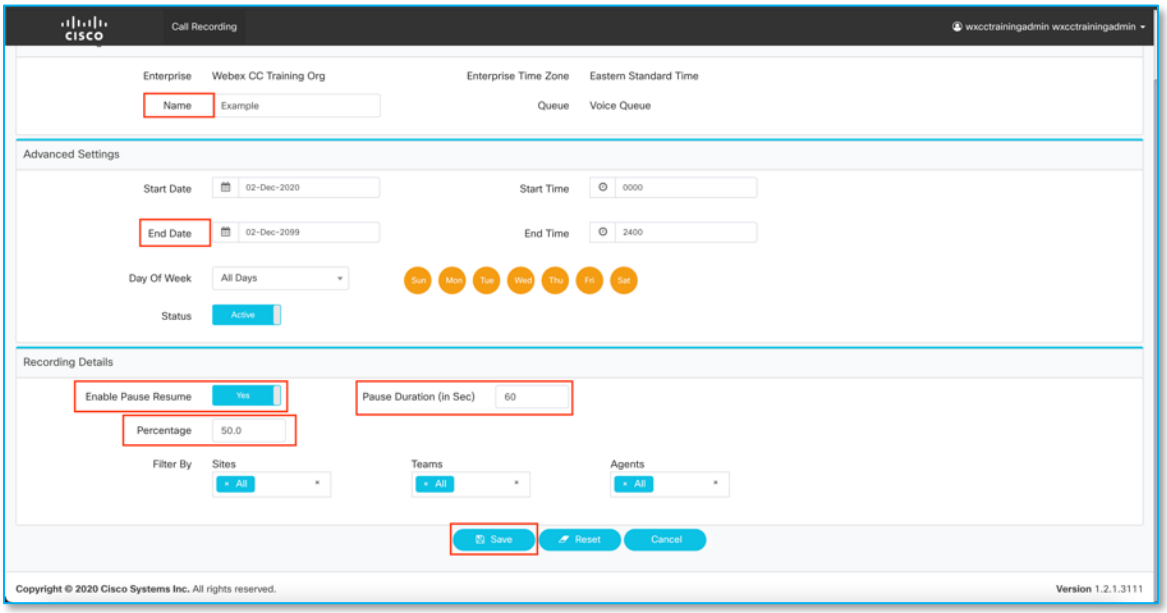
10.11☐ Fill in the information as next to the red boxes, then click save.



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11 Lab 11 – Agent Desktop Client

Purpose: Login to the Agent Desktop Client for the first time.

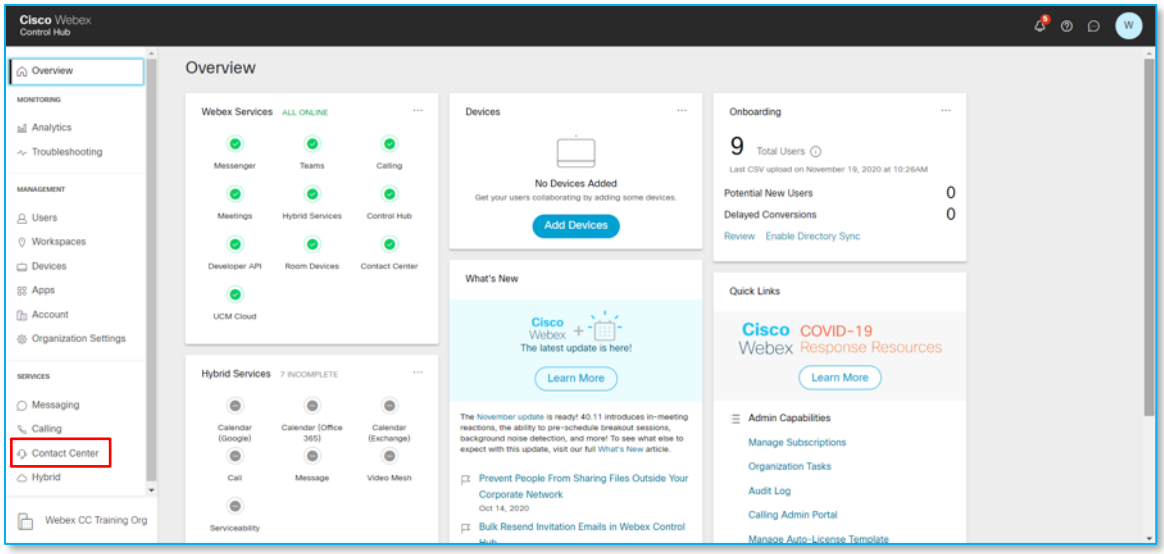
Estimated execution time: 10 minutes.

Download the Agent Desktop template

11.1 ☐ If you are still logged in the portal, log off, open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

11.2 ☐ Once logged in then click "Contact Center" as indicated in the following picture.



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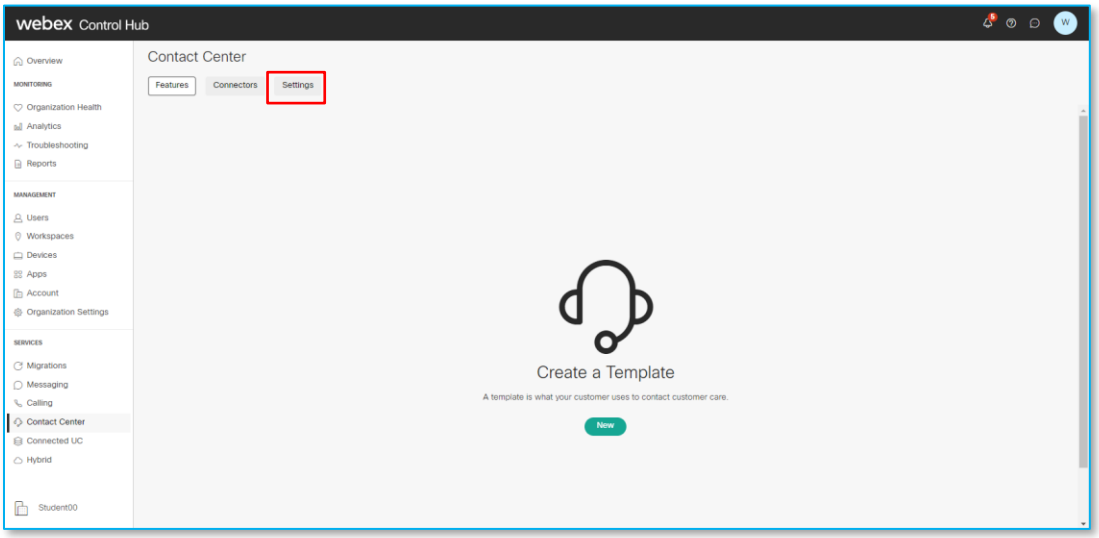
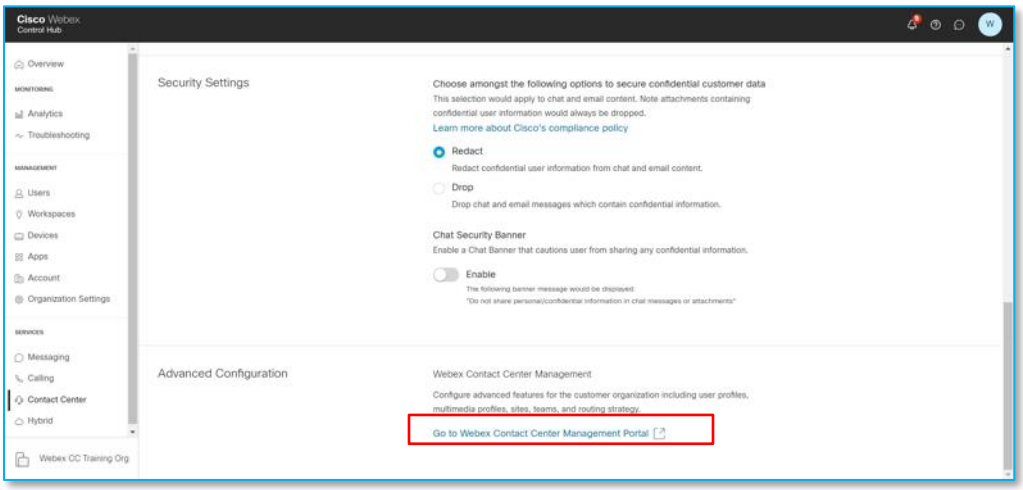
11.3 ☐ Click “Settings” on the horizontal menu bar.



11.4 ☐ Scroll Down and click on the link “Go to Webex Contact Center Management Portal” to enter the Tenant Portal.



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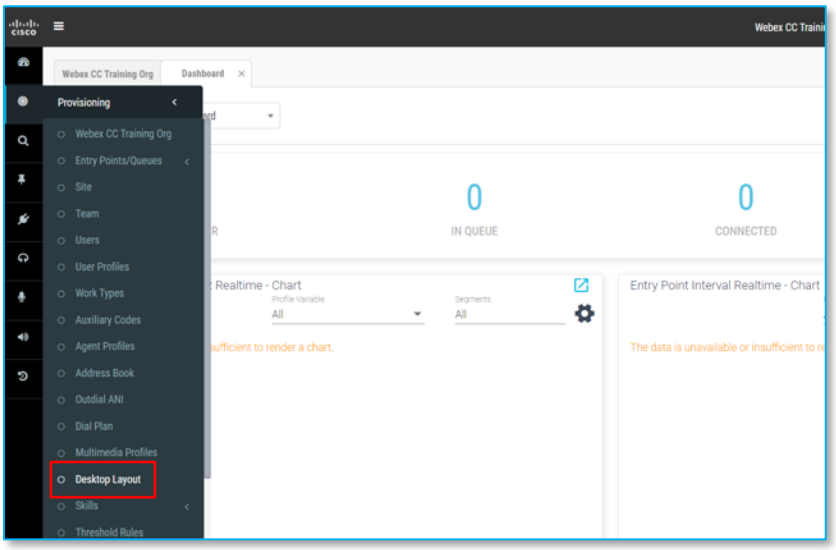
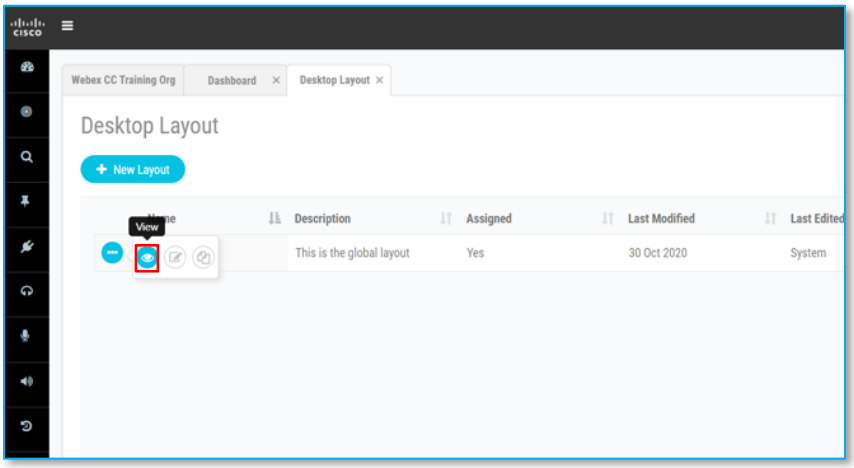
11.5 ☐ A new browser tab will be opened in your browser. Click on "Desktop Layout".



11.6 ☐ Click on the three dots on the "Global Layout", then on "View".



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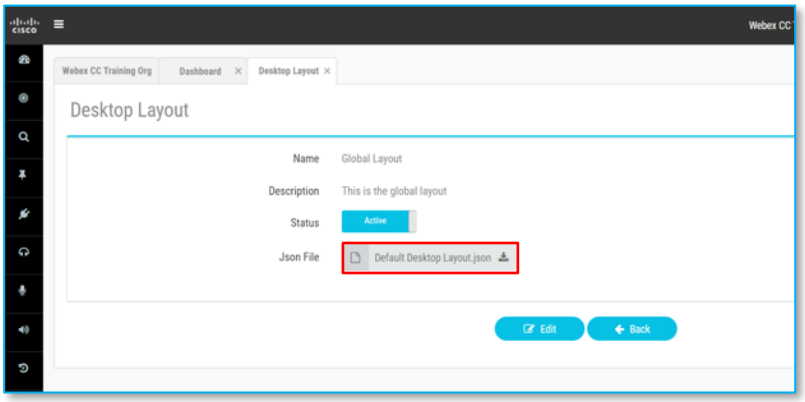
11.7 ☐ Click on "Default Desktop Layout.json" button and open the file.



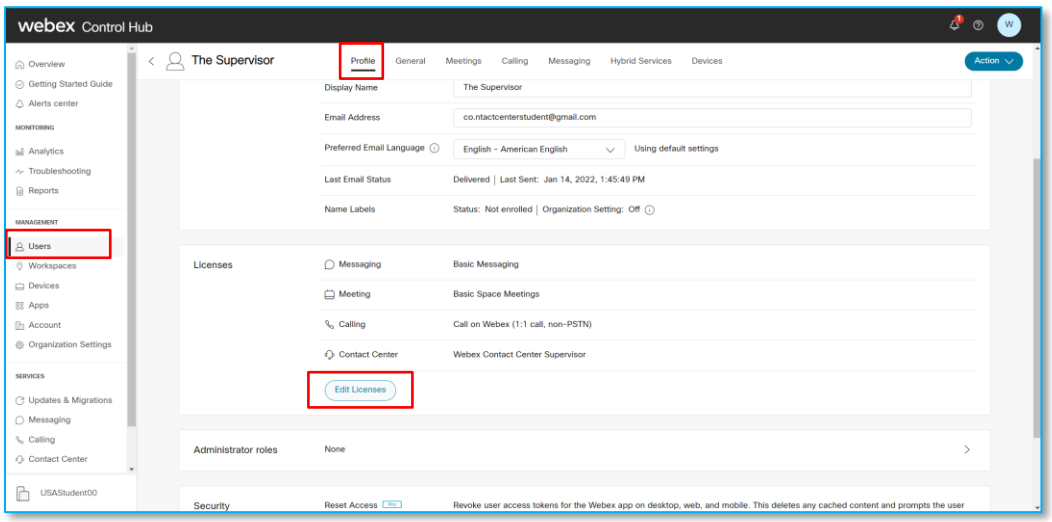
11.8 ☐ The downloaded file enables you modify the look and feel of the Agent desktop. The purpose of this part of the lab is so you know how to get hold of it and could make changes if required. We will NOT be doing that in this lab.

Testing Voice Interactions

Prepare the Supervisor to dial the Voice Entry point number, from Webex Calling (another alternative is to use a mobile phone with teams).

In order to use Webex Calling to test the voice side of our setup, you should first add Webex calling to your Supervisor and Agent 1.

In Control Hub, go to **Users**, select the Supervisor, click on **Edit Licenses**.



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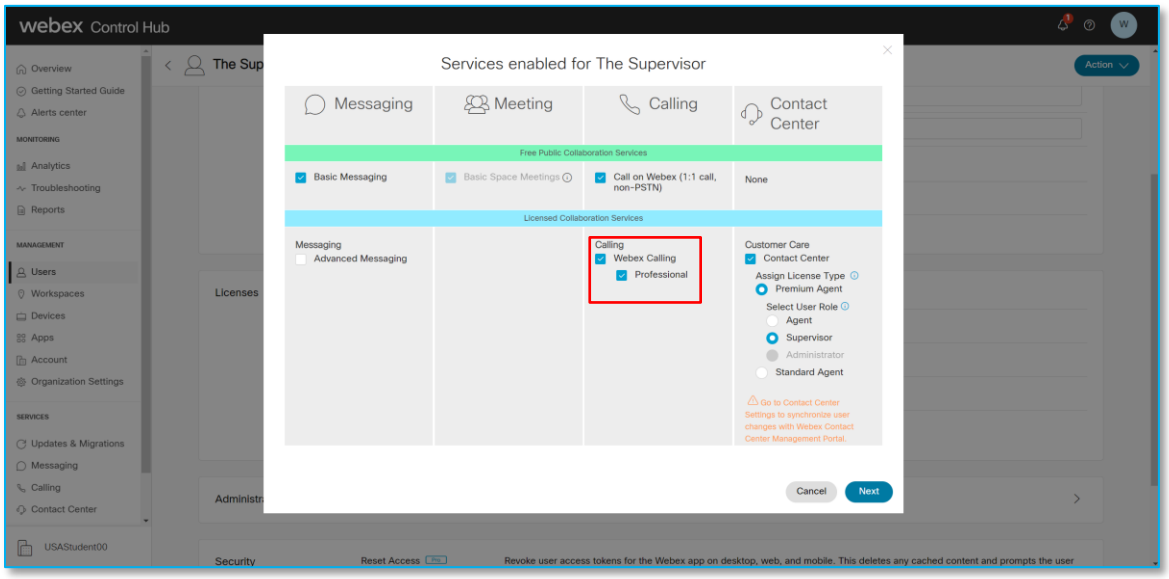

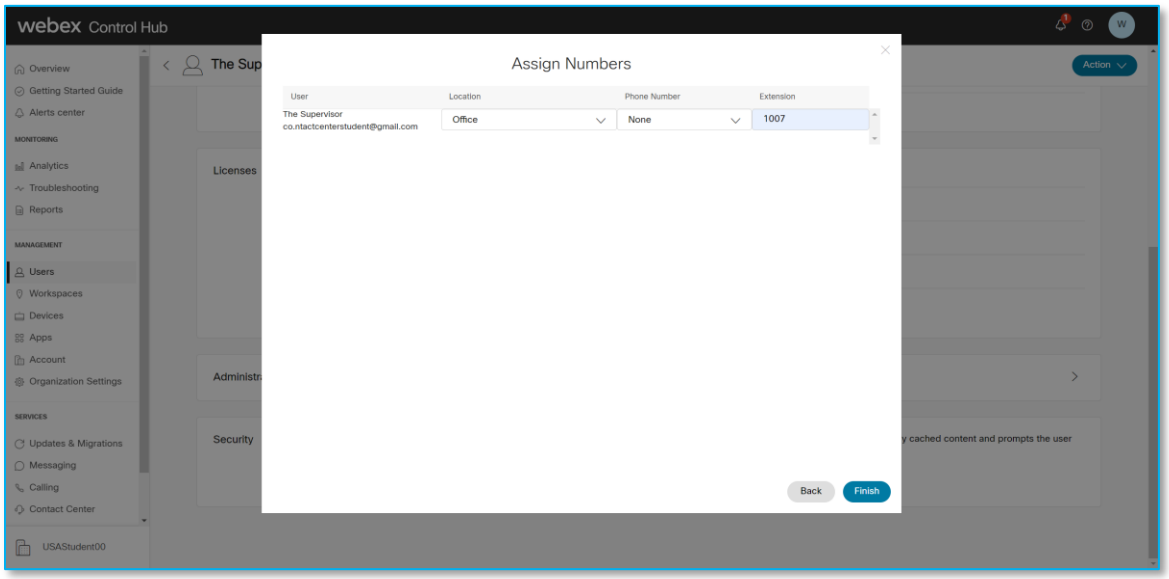

Do the same for Agent1 except make their extension 1001.

Then you need to modify the Calling Behaviour to Webex Calling App for the supervisor. With this done, you can have the Supervisor use the Webex Calling App for calls and have the Agent use Teams.

In Control Hub, go to **Users**, select the Supervisor a **slide out** will appear, scroll down and click on **Calling Behaviour**, and select **Webex Calling App**.

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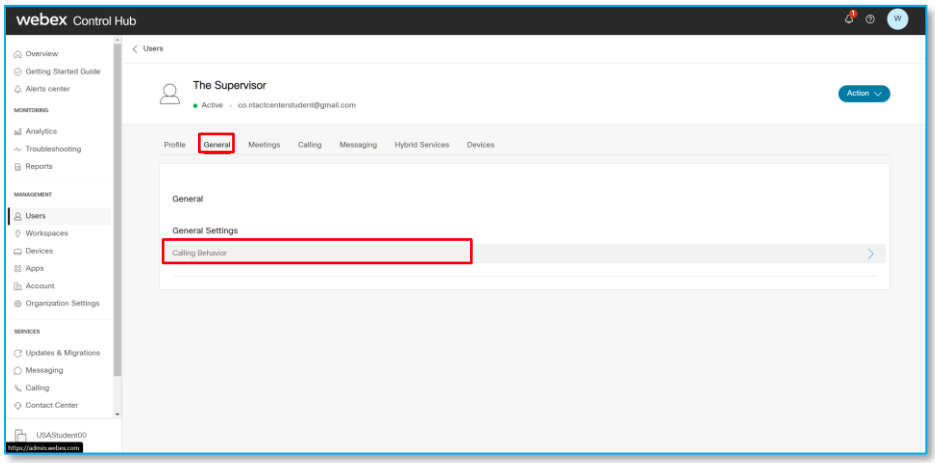
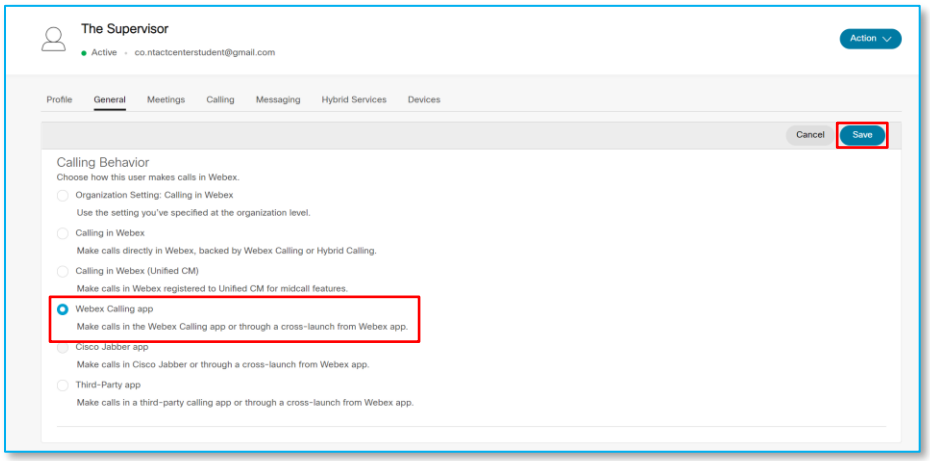
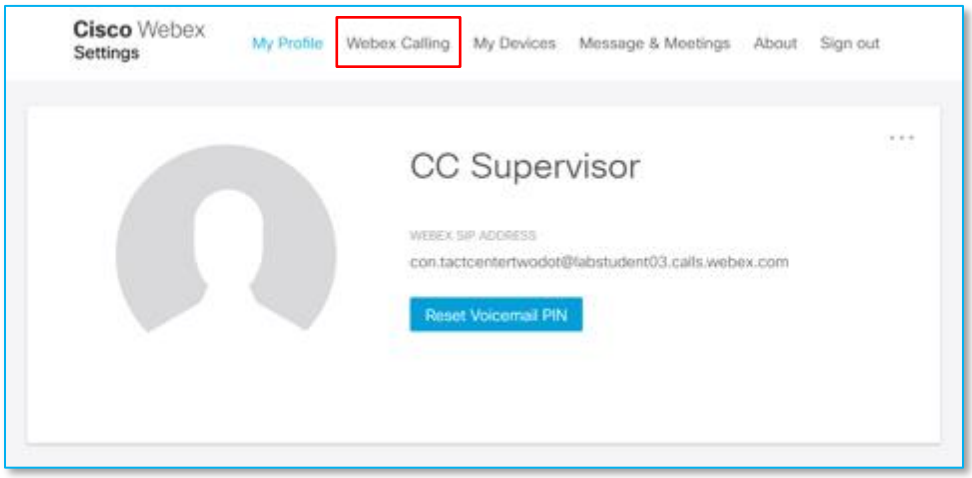




Download Webex Calling App for the supervisor

Login to https://settings.webex.com/ with the supervisor credentials. Click on "Webex Calling" this will cross launch CUP in a new browser tab.



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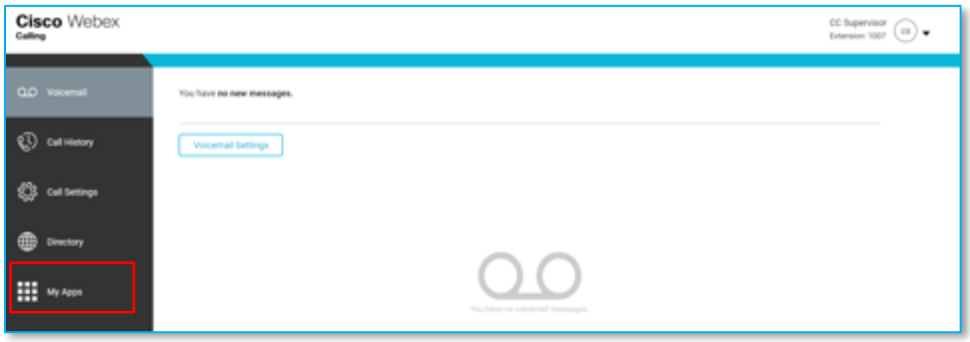
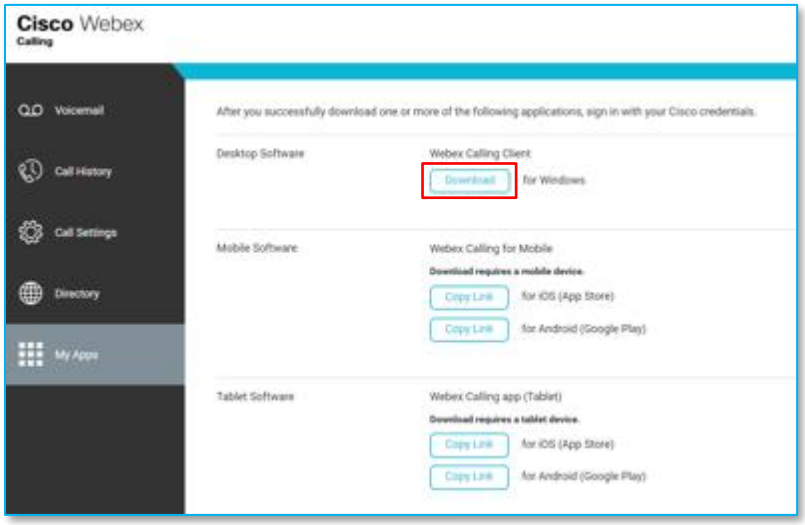
Go to “My Apps”



Go to “My Apps”, and Download the Webex Calling Desktop App



Open Webex Calling and login with the supervisor credentials

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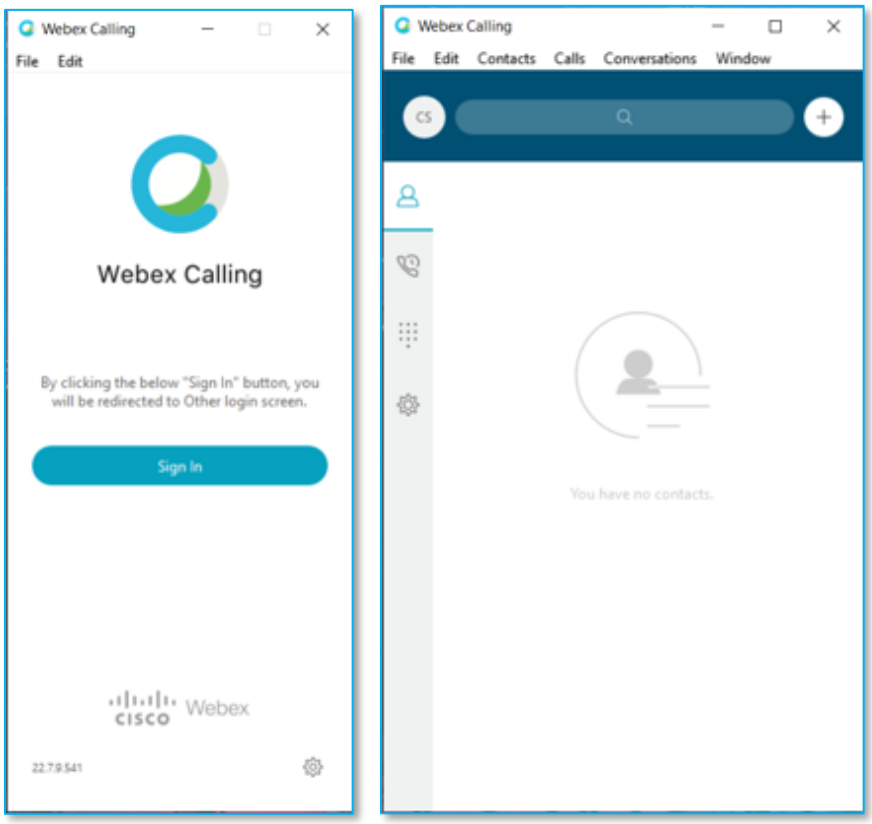
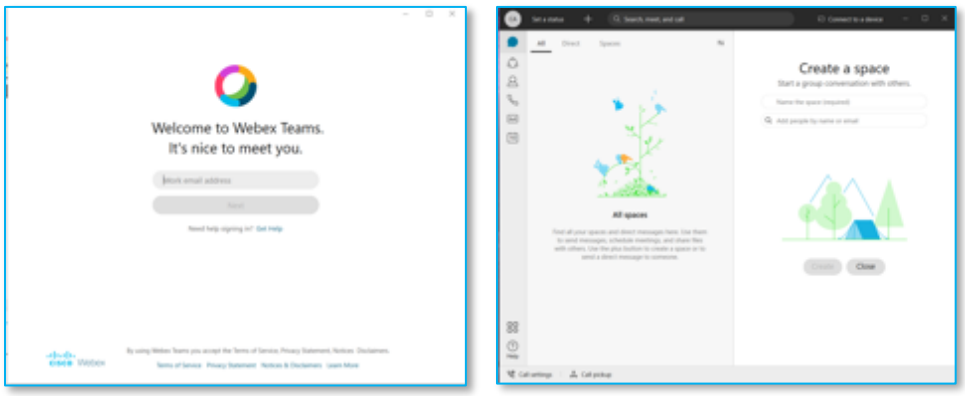


Prepare the Agent to receive calls from Teams.

Login to Teams with the Agent One's credentials. (You will have to log out of teams that is using your current credentials) Take note of the Agent Extension.



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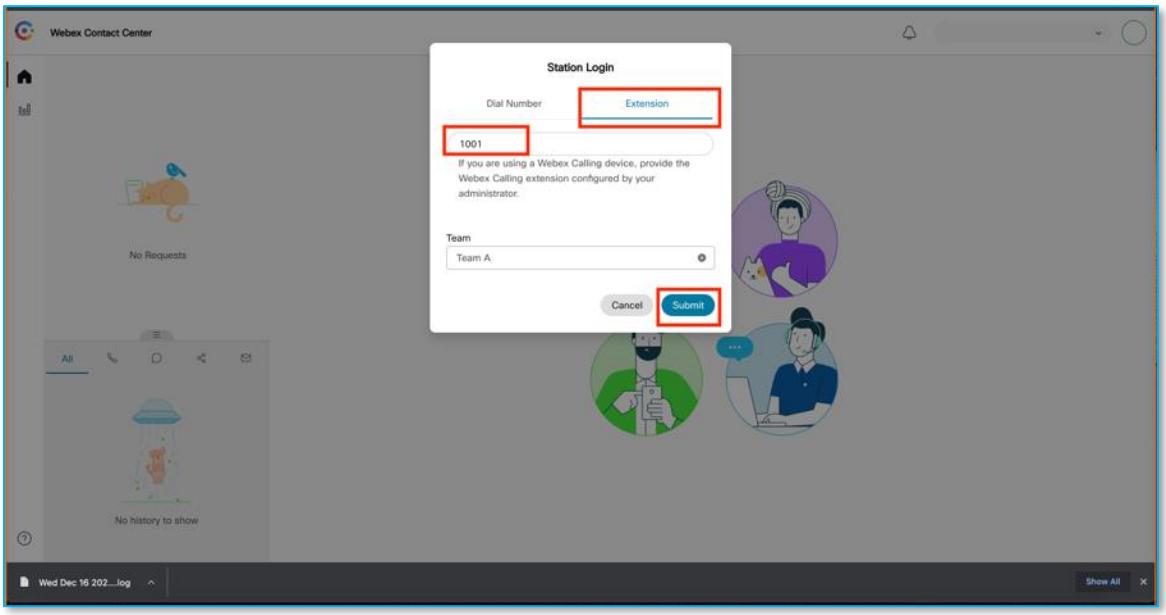
Logging in to the Agent Client and Making the Agent Available to receive interactions

Login the Agent Desktop with your Agent credentials, and use your extension as a number.

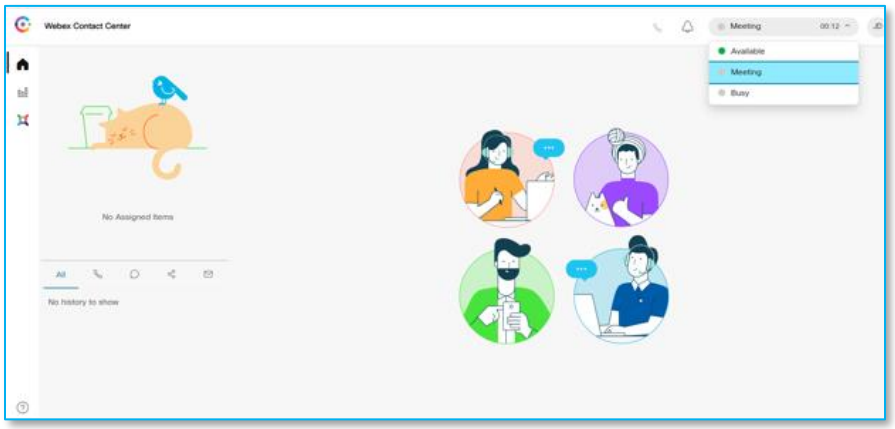
11.9 ☐ Make sure you are logged in as your CC Agent One. Please use a browser window opened in private/incognito mode.

URL: https://desktop.wxcc-us1.cisco.com
Login: CC Agent 1's email address
Password: your password

11.10 ☐ In the next screen, Select "Extension" and provision your Agent Extension of 1001, then click Submit.



11.11 ☐ Now on the "Status Now" dropdown menu select "Available".



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Dial the Voice Entry Point number, from the Supervisor Webex Calling app, answer form the Agent Teams, and play with the Agent Desktop environment.

STOP! ***Please do not proceed until instructed to do so.***

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12 Lab 12 – Configuring Virtual Agent

Purpose: configuring a Customer Virtual Agent via DialogFlow.

Estimated execution time: 20minutes.

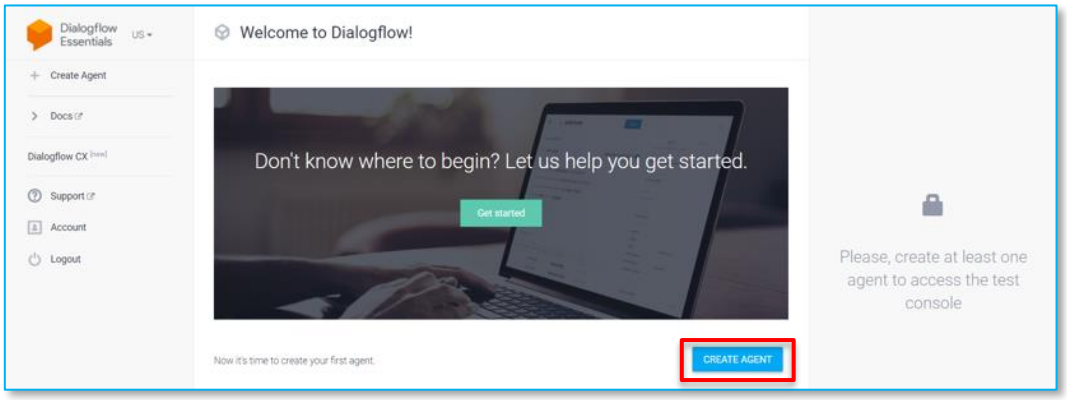
Pre-requisite: each student should possess a Dialogflow account: https://dialogflow.cloud.google.com/

Tip! You may also log in to Google Cloud Platform with your Gmail credentials.

Creation of a DialogFlow Agent for Customer Virtual Assistant

We will first need to create a Google DialogFlow Agent with specific Intents in order to enable a Customer Virtual Assistant.

12.1 ☐ Log in to https://dialogflow.cloud.google.com/



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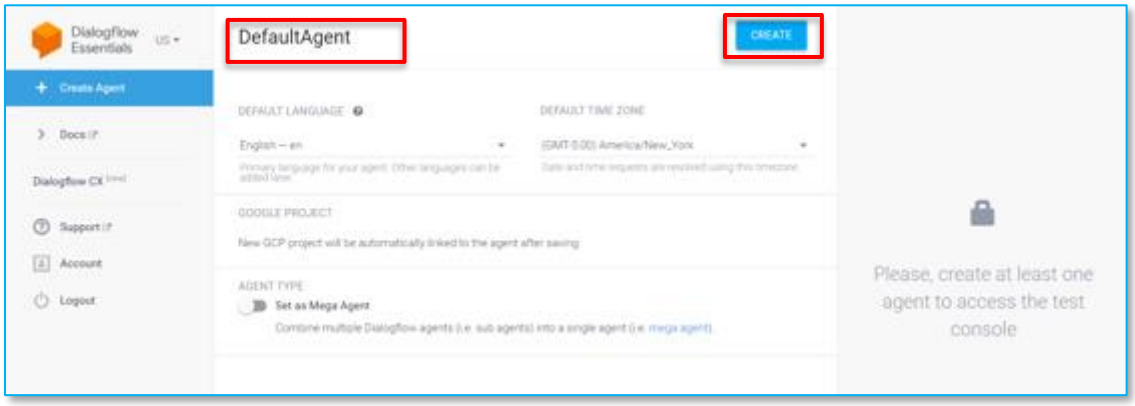
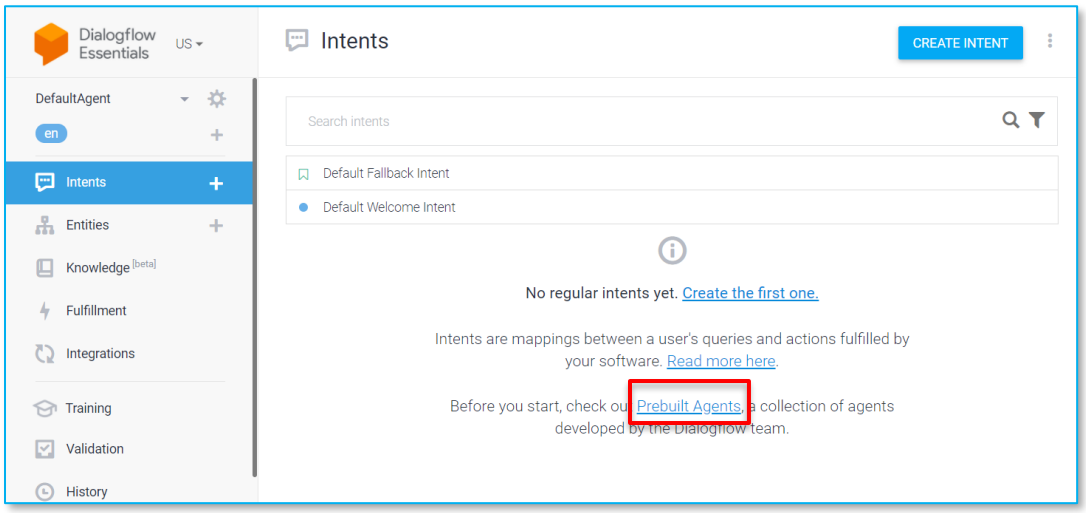
12.2 ☐ Configure the default Agent parameters as shown in the next picture and click "Create".



12.3 ☐ In the next screen click on "Prebuilt Agents".

We want to reuse a prebuilt agent dealing with Flights. Actually, you will have to train the agent following the guidelines included in the Google DialogFlow website according to your specific purpose.



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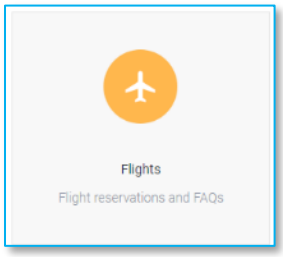
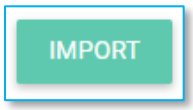
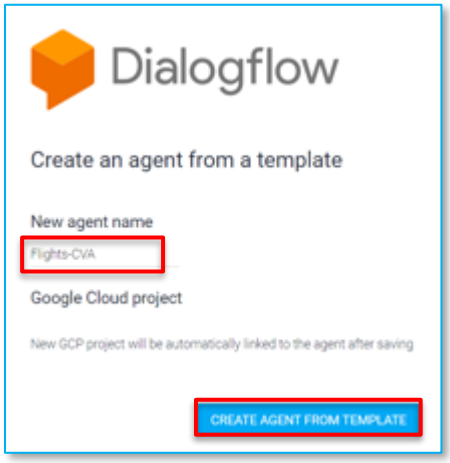
12.4 ☐ In the next screen search for the "Flights" tile.



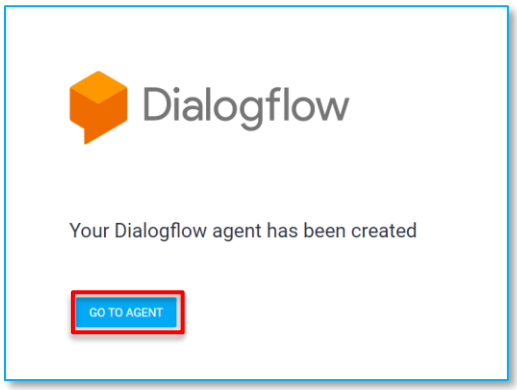
Once you have found it, click on it and select "Import"



12.5 ☐ As soon as the import is done, give a name to the agent, keep Create a new Google project, and click on "Create Agent from Template".



12.6 ☐ Click on "Go to Agent".



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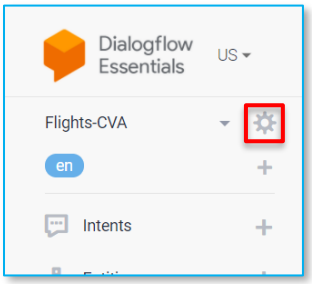
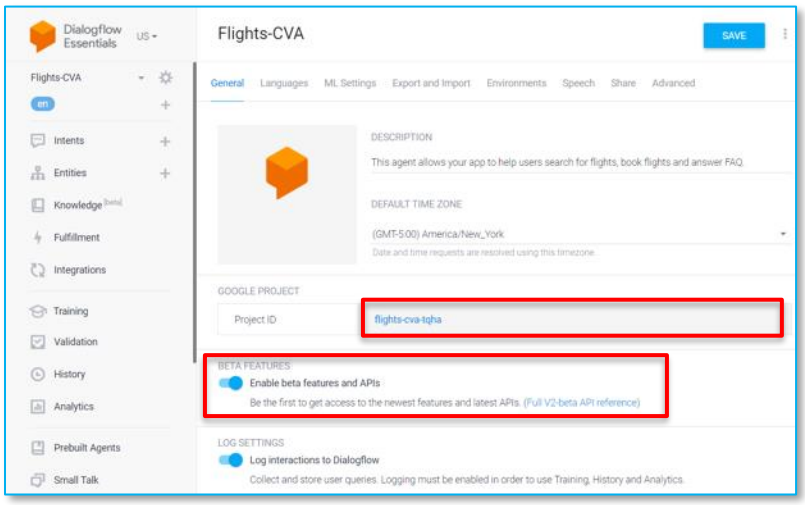
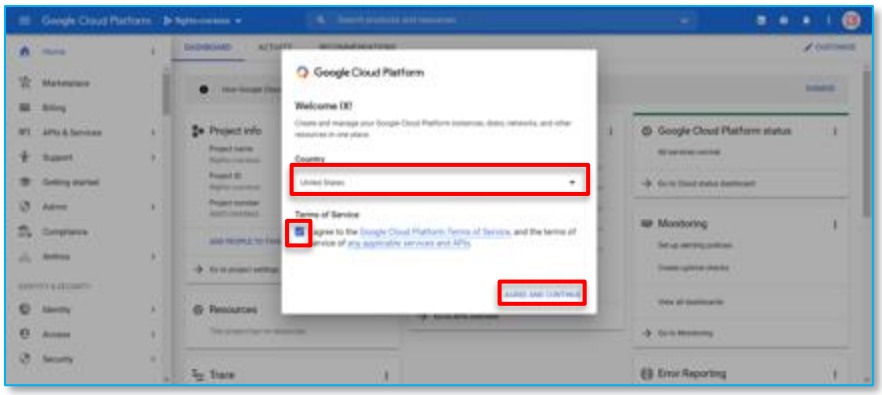
12.7 ☐ **In the next page on the *gear icon* in order to open the Agent Settings.**



12.8 ☐ **In the Agent Settings page, look for the "Google Project" URL. Take note of the Project ID name. Click on the "Project ID" link so you can cross-launch the service account screen.**



12.9 ☐ **Select "United States" as a country and check the term of service. Click "Agree and continue"**



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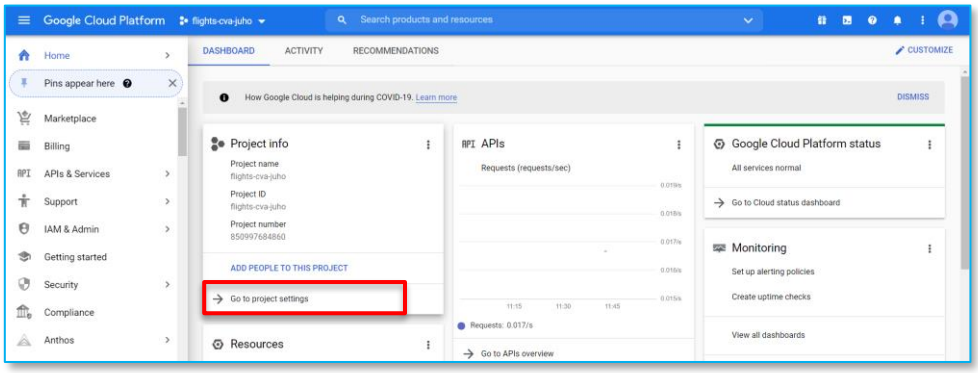
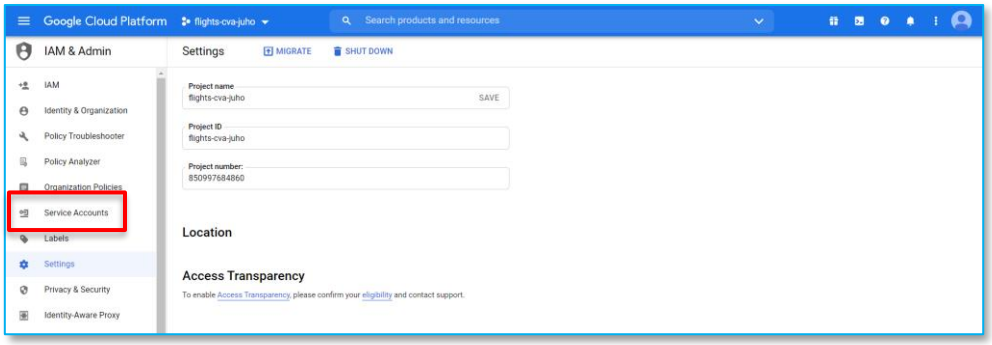
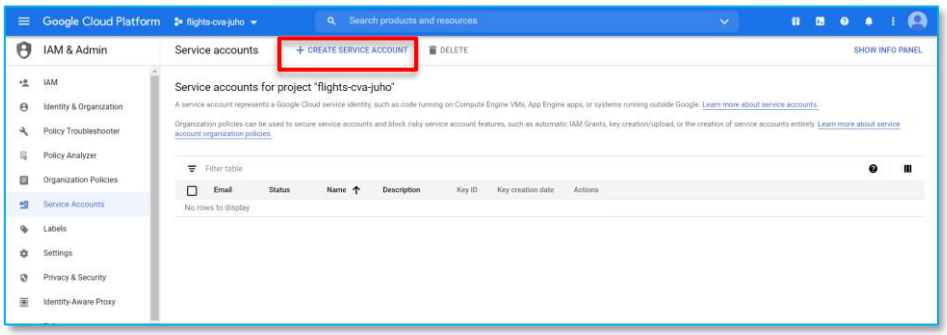
12.10☐ In the next page click on “Go to Project Settings”



12.11☐ In the next page click on “Service Accounts”



12.12☐ In the next page click on “Create Service Account”



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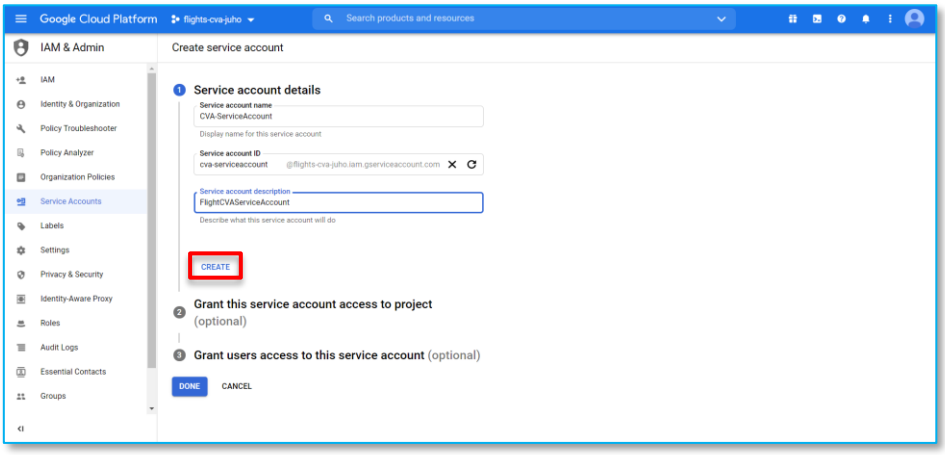
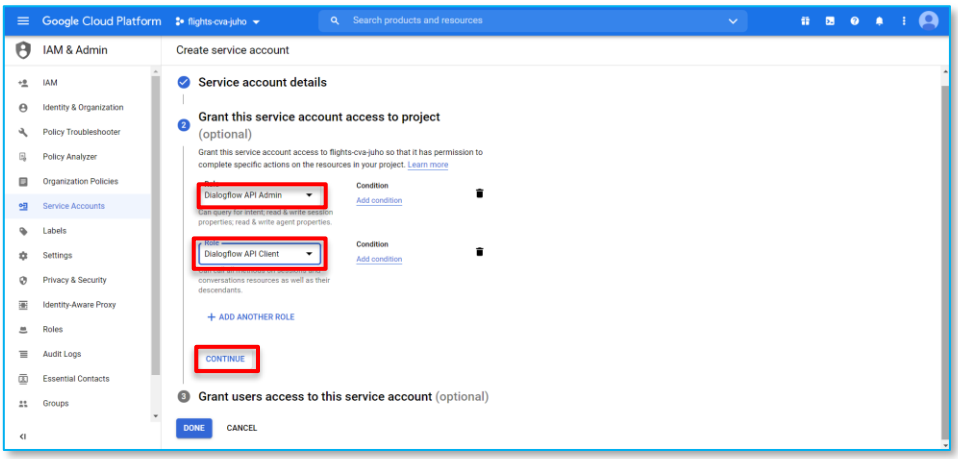
12.13☐ Give a name to the Service account, give a description and click on "Create"



12.14☐ Select "Dialogflow API Admin" as Role and click on "+ Add Another Role" and then select "Dialogflow API Client". This will add a second Role. Click on "Continue"



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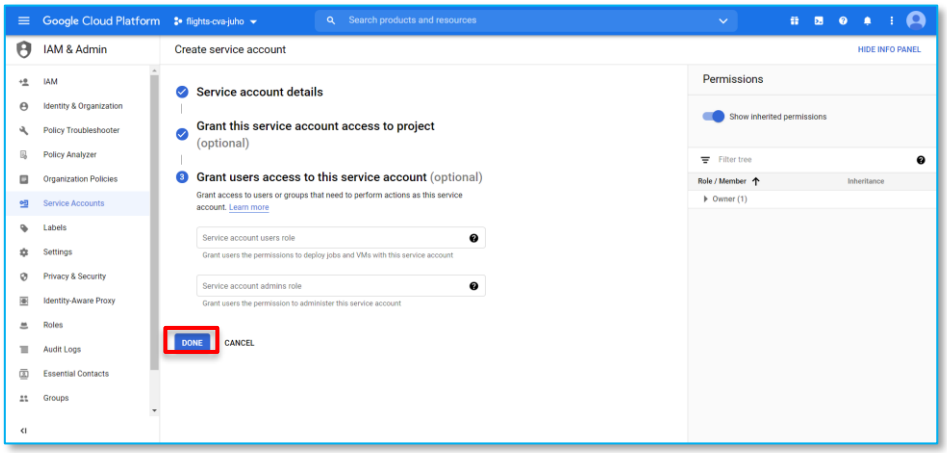
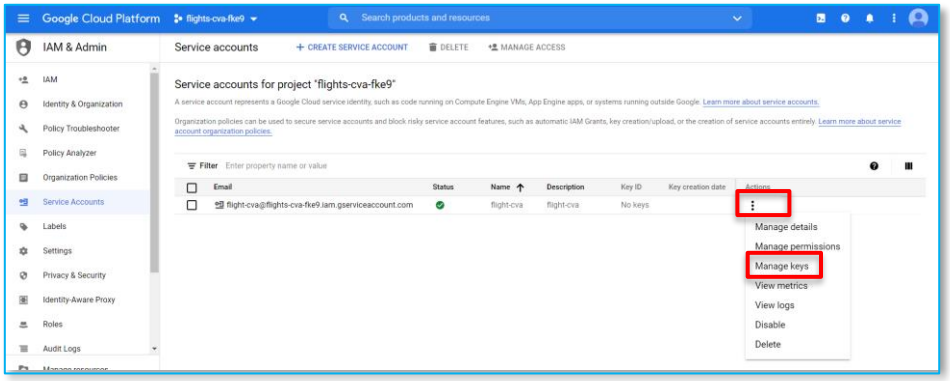
12.15☐ Click on “Done”



12.16☐ Click on the 3 dots on the right side of your new Service Account. Then click on “Manage keys”.



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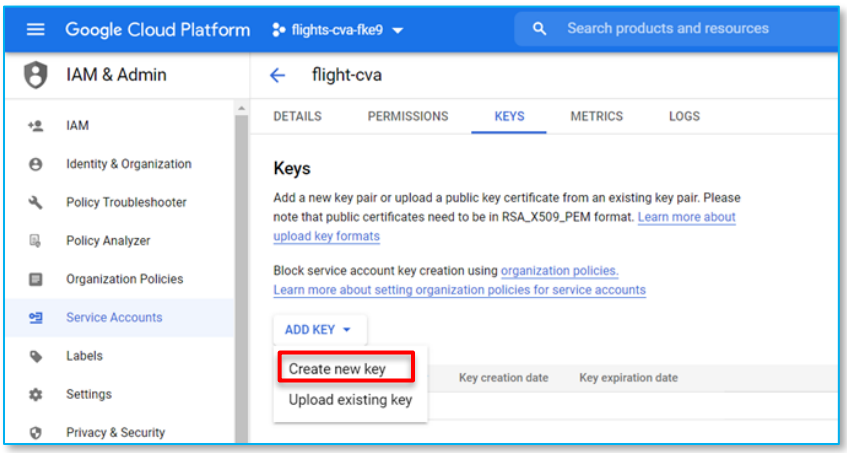
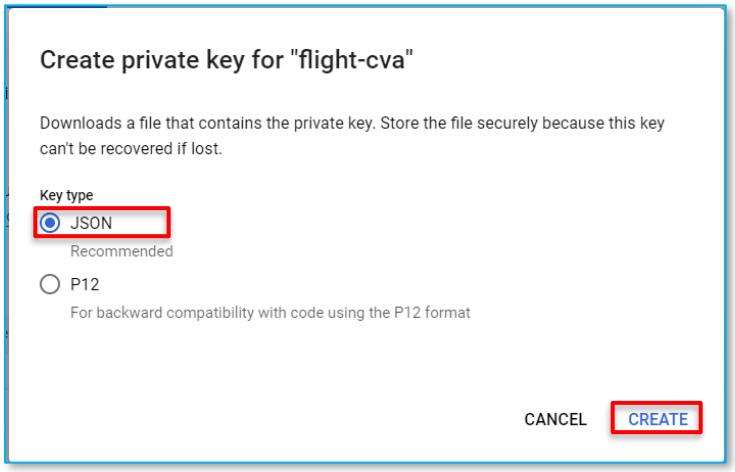
12.17 ☐ Select “Create new key”.



12.18 ☐ Select “JSON” and click on “Create”.



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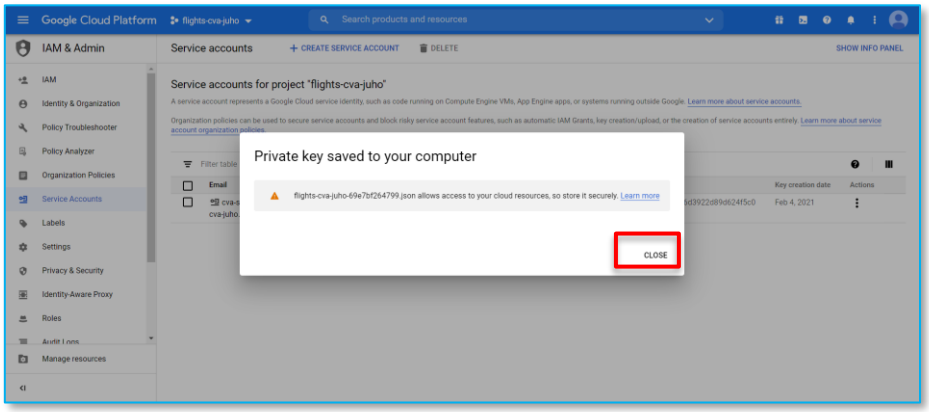
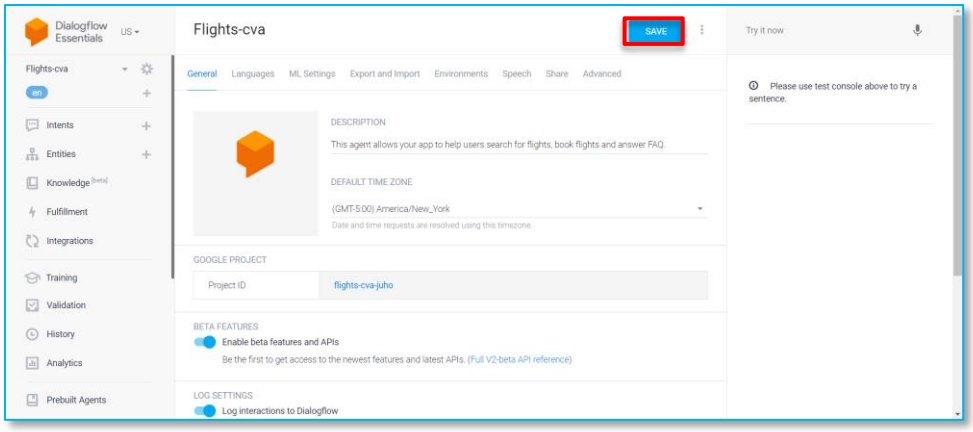
12.19 ☐ Download and save your private key on your computer. Once done, click "CLOSE".

The Private Key is needed to link the Webex Contact Center Customer Virtual Assistant with the Google DialogFlow Agent.



12.20 ☐ Close the Service Account tab in your browser and click "Save" for your custom virtual agent



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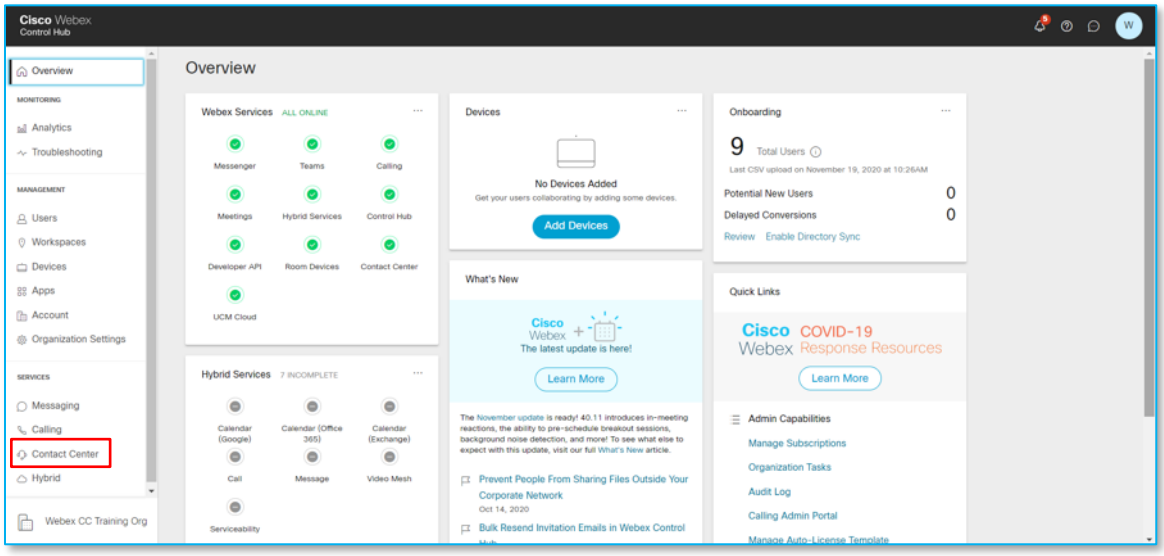
Customer Virtual Assistant Provisioning

We will now configure the Customer Virtual Assistant in CH using the Google DialogFlow Agent that we have just created.

12.21☐ Leave the Google DialogFlow open and in a new browser tab log in to your Tenant.

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

12.22☐ Once logged in then click "Contact Center" as indicated in the following picture.



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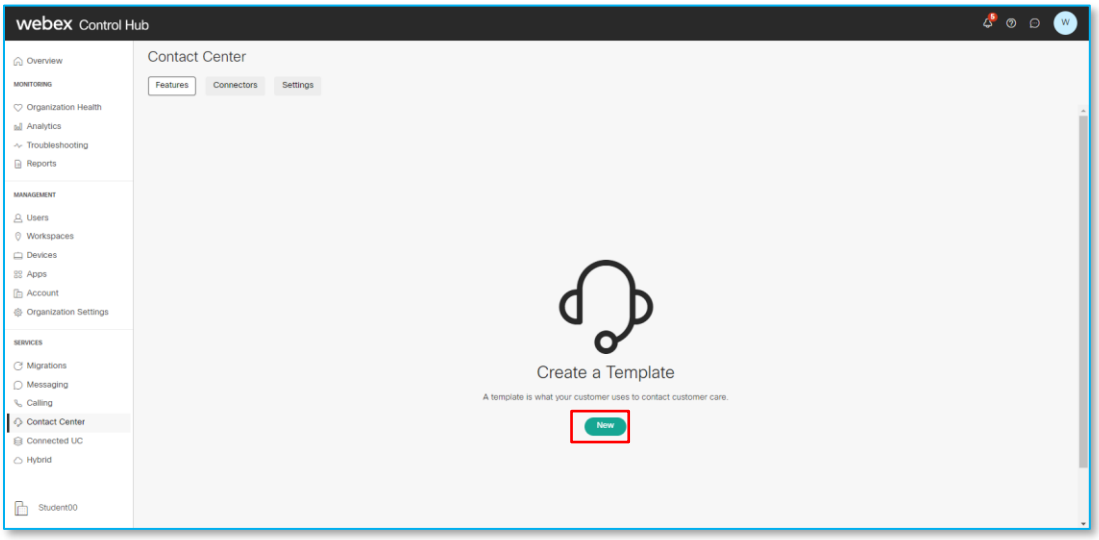
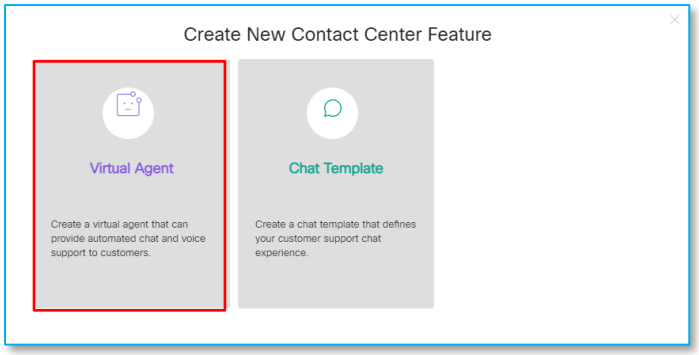
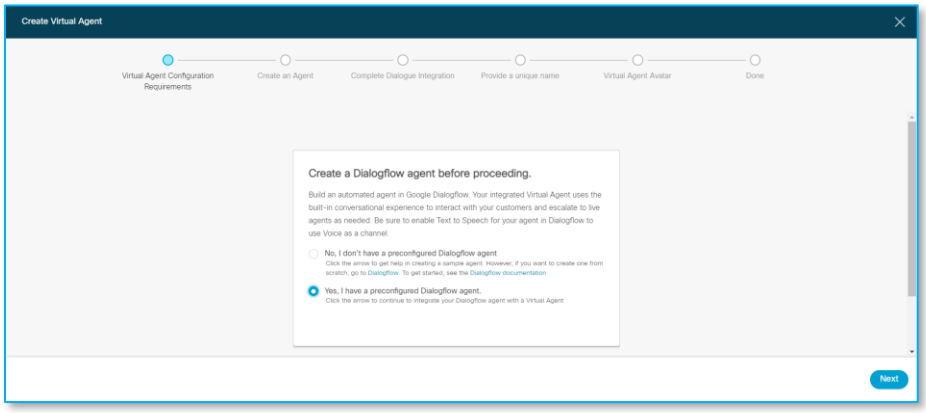
12.23☐ On features click on the“New” Button



12.24☐ Click the “Virtual Assistant” tile, then ensure “Use for Chat” is the only option selected. Then click “Next”



12.28☐ Select the toggles for Chat and Voice as below and click “*Next*”.



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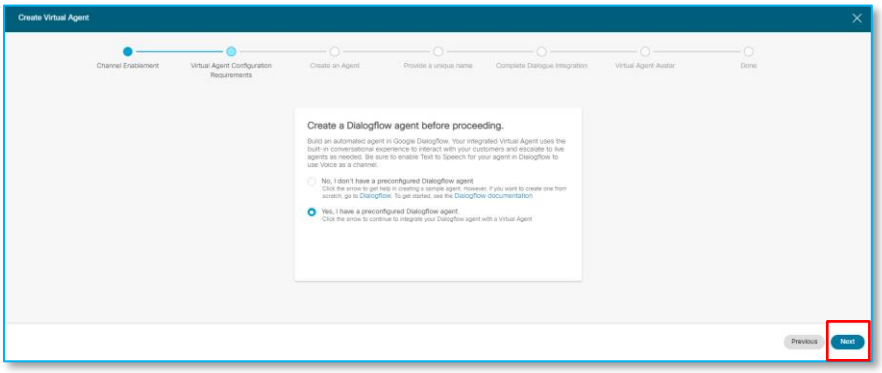
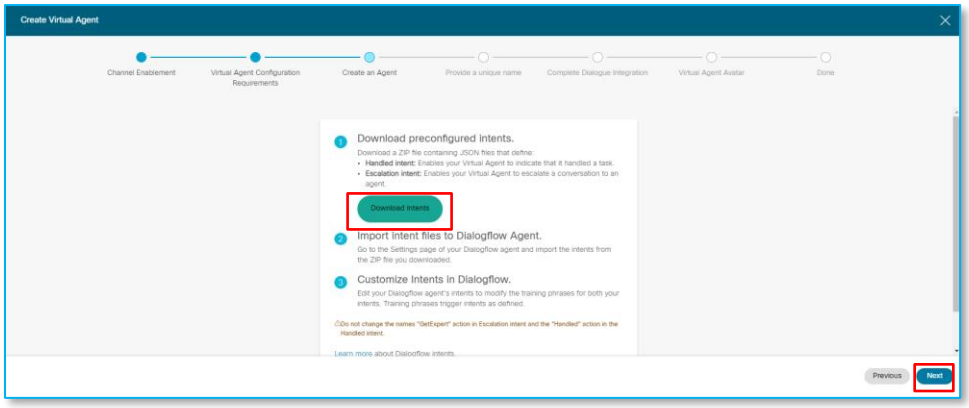
12.28☐ Select "Yes, I have a preconfigured Dialogflow agent" and click "*Next*".

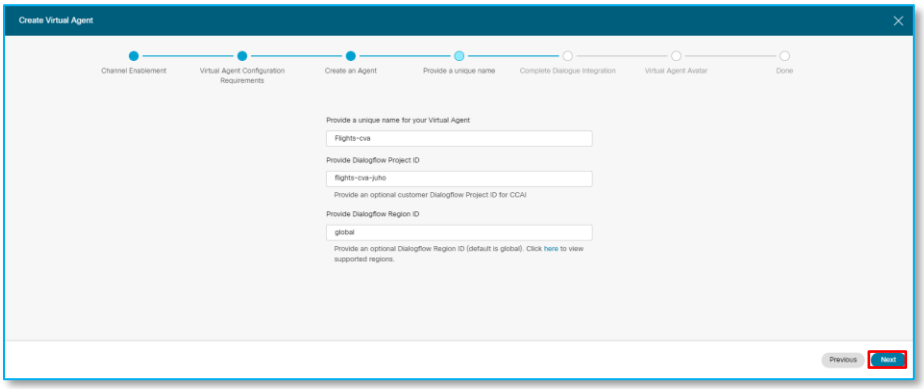


12.28☐ In the next screen click on "Download Intents". Save the file on your computer and then click "*Next*".

The Handled and Escalation intents are needed to instruct the Google Agent to either terminate a Chat or to escalate it to a Webex CC Agent.



12.28☐ The fields as shown below, use the Dialogflow Project ID, and "global" as Region ID, and click "*Next*".



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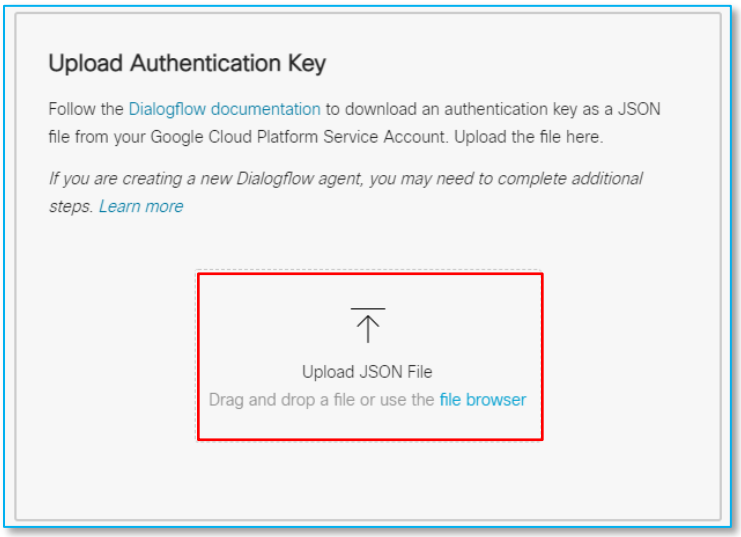
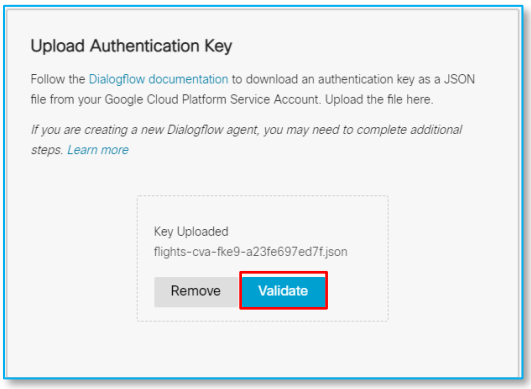
12.28☐ In the next screen upload the JSON file that you that you previously saved on your computer. Then click on "Validate" and after that click the *Next blue arrow*.





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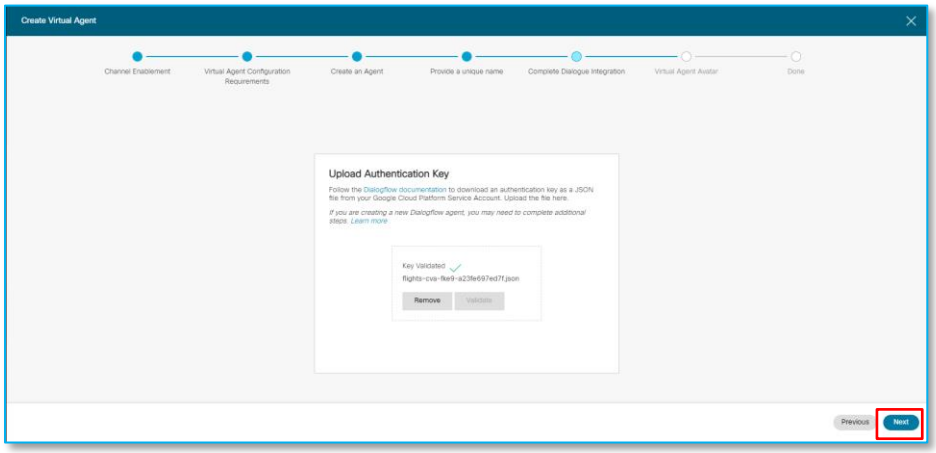
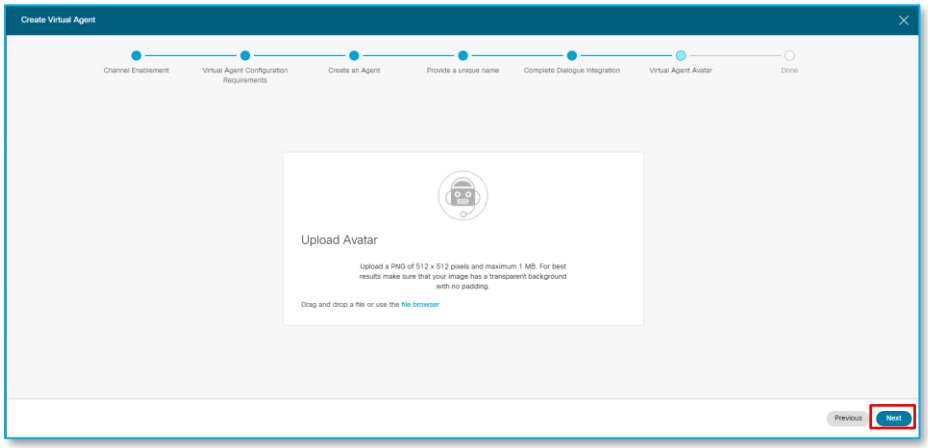
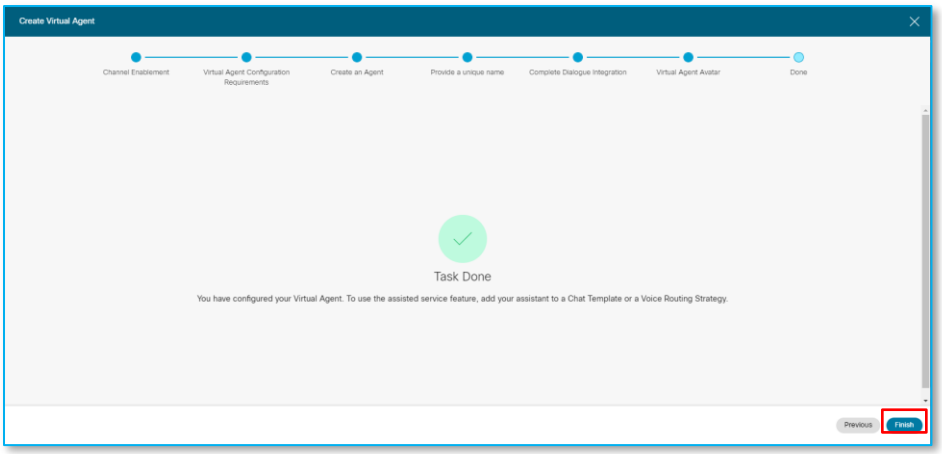
12.28☐ Click "*Next*".



12.28☐ Click on "Next".



12.28☐ In the next screen click on "Finish".



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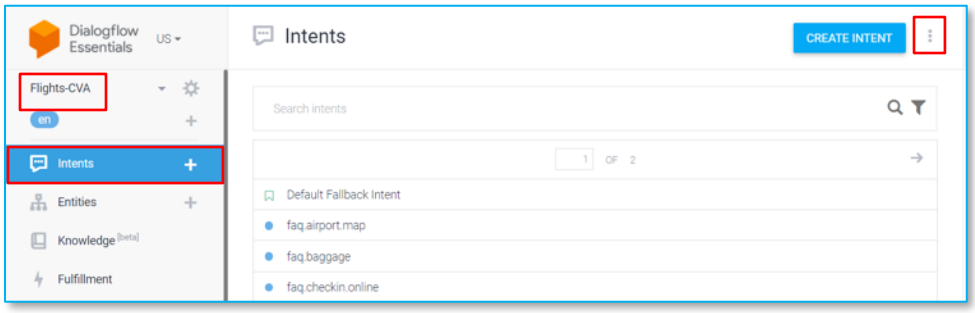
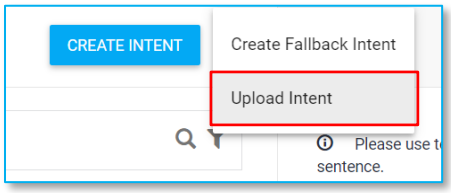
Configuring Escalation and Handled Intents in DialogFlow

We will now have to add the Escalation and Handled Intents json files created by the WXCC Virtual Customer Assistant into the DialogFlow Agent "Flights" that we previously created.

12.25 ☐ If you are no longer logged in, sign in to https://dialogflow.cloud.google.com/. When Signed in, Make sure that the Virtual agent you created is selected. In the Intent page click on the *three dots icon* and then click on "Upload Intent".

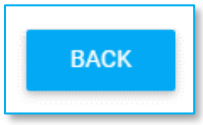




12.26 ☐ Upload the 2 json files previously created via the WXCC Customer Virtual Assistant. The files are in ZIP file named *intents.zip*.

You will have to upload each file individually.

12.27 ☐ Once done, click on "Back".



Tip! In a real deployment, you may want to train the previously loaded Intent by clicking on each of them in the Google Agent Intent page.

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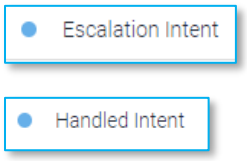

12.28 ☐ You have now created a Virtual Agent available for use in Chat, Facebook and Voice.

STOP! ***Please do not proceed until instructed to do so.***

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13 Lab 13 – Configuring Email Routing

Purpose: configuring an Email Queue, an Email Entry Point Routing Strategy, an Email Queue Routing Strategy.

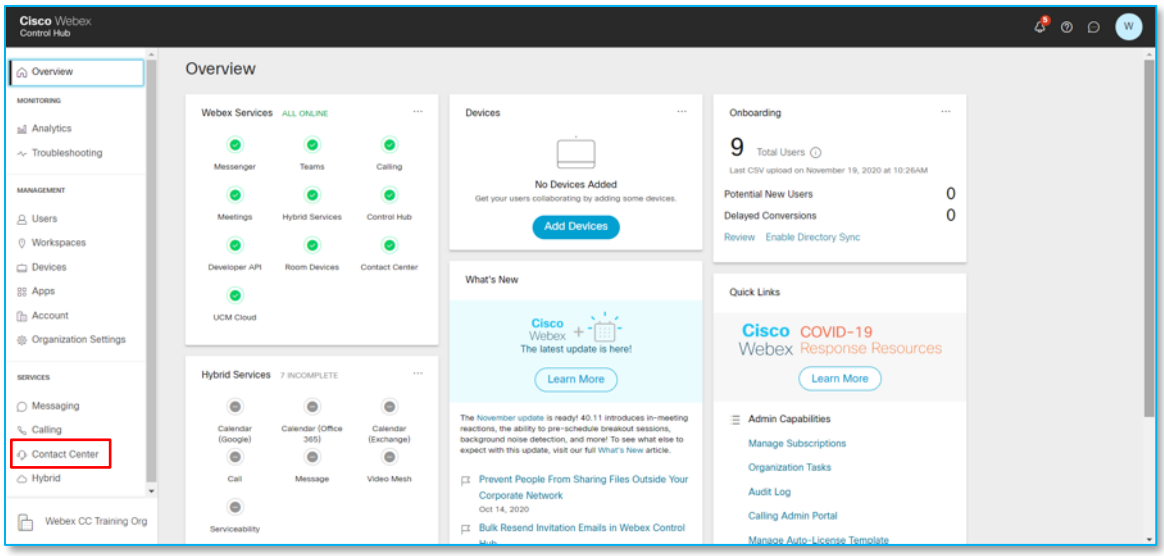
Estimated execution time: 20 minutes.

Provisioning Entry Points for Email

13.1 ☐ If you are still logged in the portal, log off, open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

13.2 ☐ Once logged in then click "Contact Center" as indicated in the following picture.



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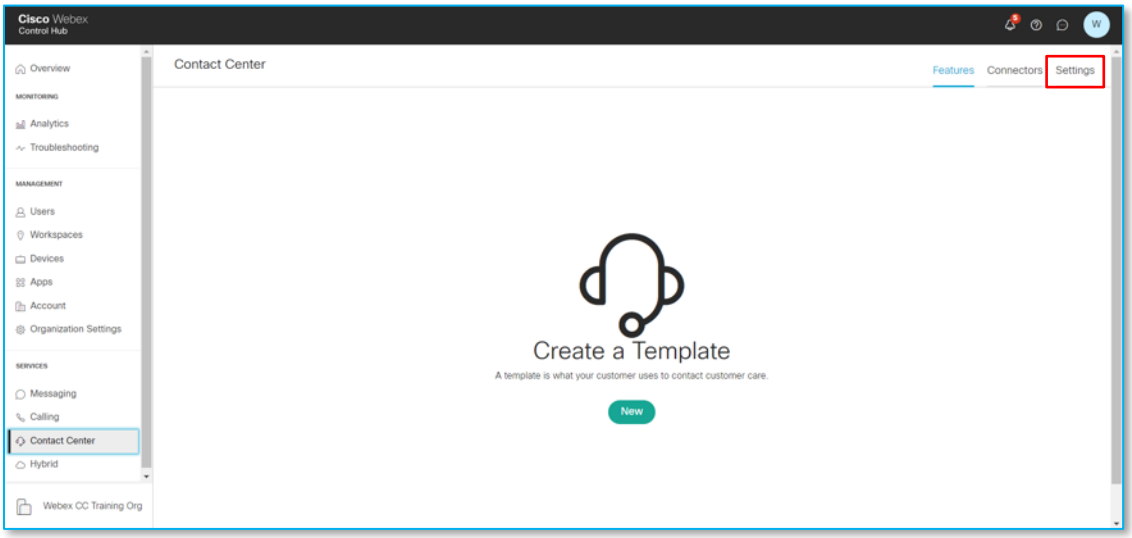
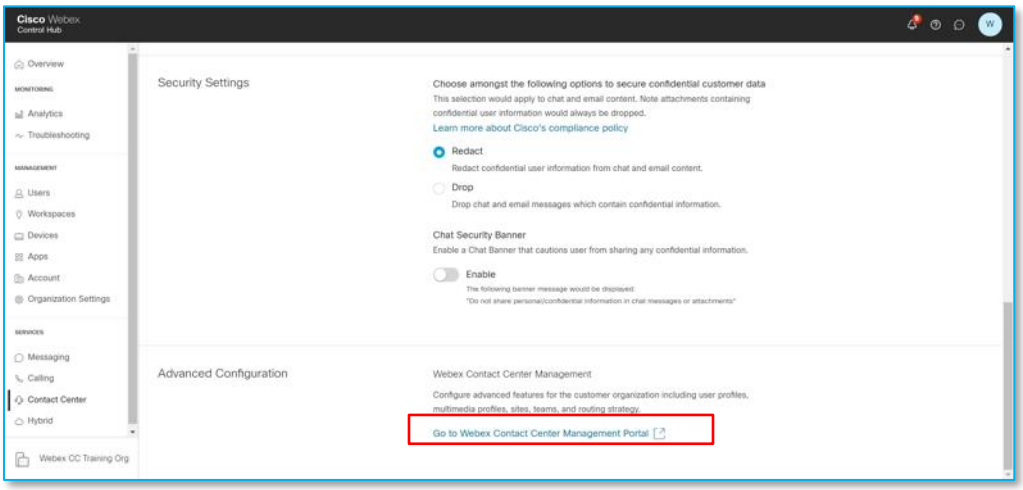
13.3 ☐ Click “Settings” on the horizontal menu bar.



13.4 ☐ Scroll Down and click on the link “Go to Webex Contact Center Management Portal” to enter the Tenant Portal.



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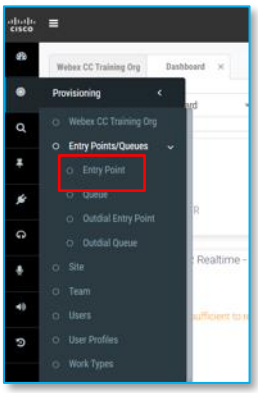
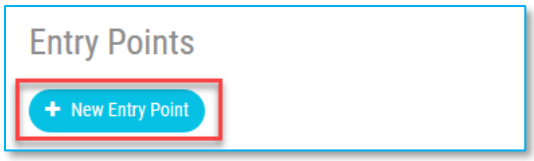
13.5 ☐ A new browser tab will be opened in your browser. Click on the "Provisioning" menu and then on "Entry Point".



13.6 ☐ Click on "New Entry Point"



13.7 ☐ In the next page provision the following values.

General Settings

Name	ENTRY_POINT_EMAIL
Description	
Channel Type	Email

Advanced Settings

Service Level Threshold	24

13.8 ☐ Click on "Save"

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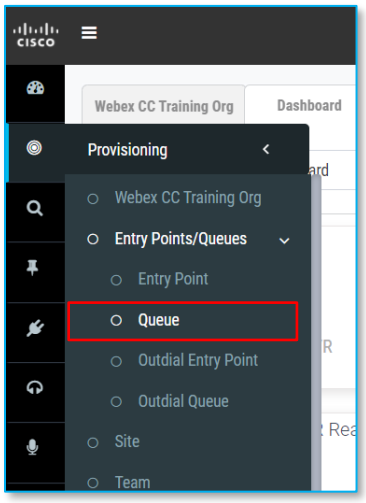
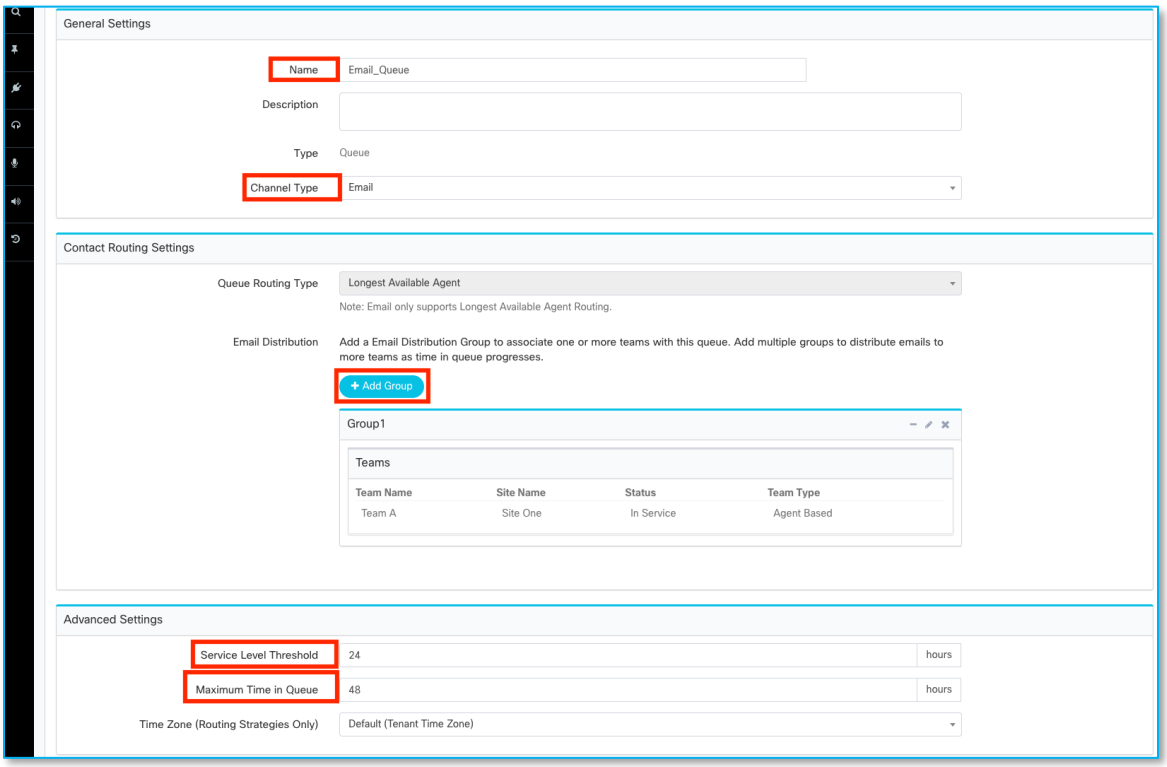
Provisioning an Email Queue

13.9 Click on the Provisioning Icon then click on "Entry Points/Queue" and then on "Queue".



13.10☐ Create and Provision a new Email Queue as shown in the next picture.



13.11☐ Click on "Save".

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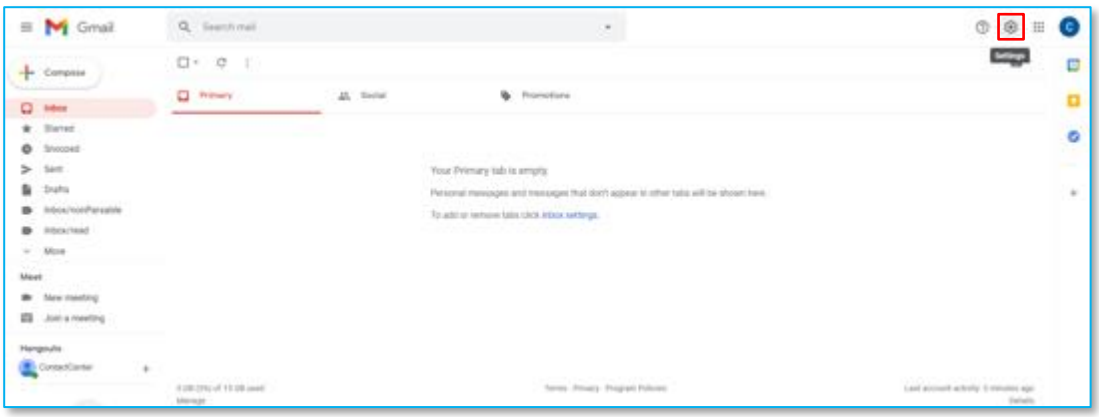
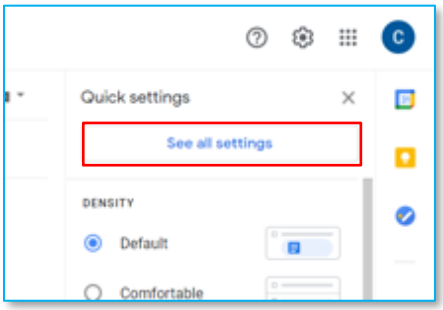
Email Configuration

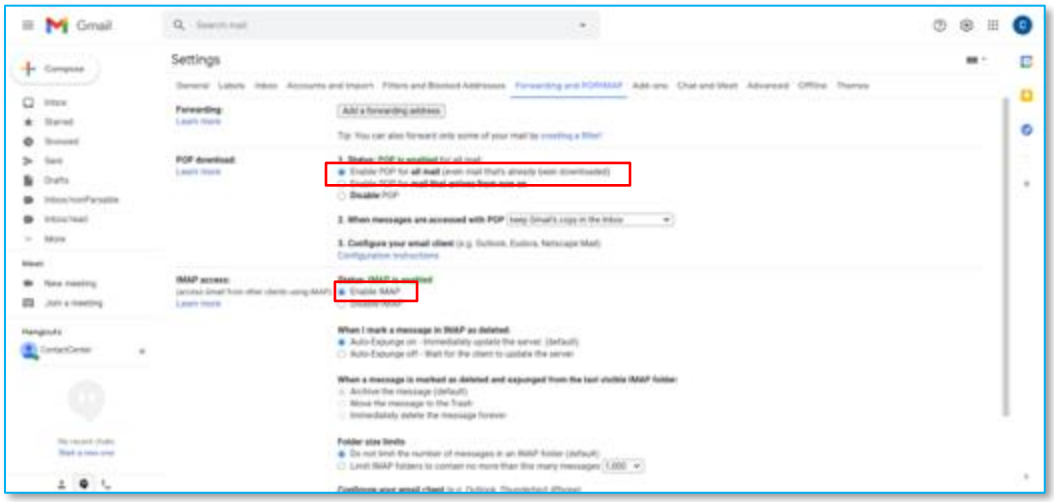
Pre-requisite: each student should possess a Gmail email to receive emails that will then be routed to Agents.

13.12☐ Log in to your Gmail account. Click on the Gear or Settings Button.



13.13☐ then click on "See all Settings" and change the following Email settings. Be sure to save the settings at the bottom of the page.





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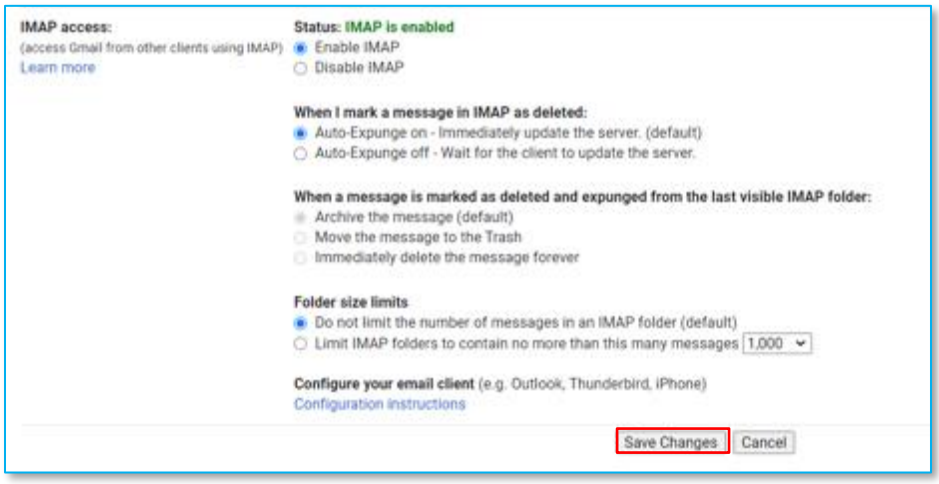
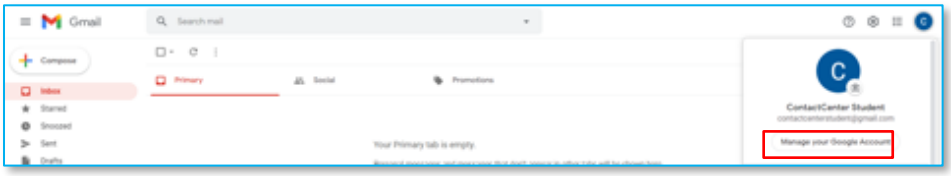


13.14☐ Within your Gmail account, click on the icon of your account, then click on "Manage your Google Account"



13.15☐ Go to Security

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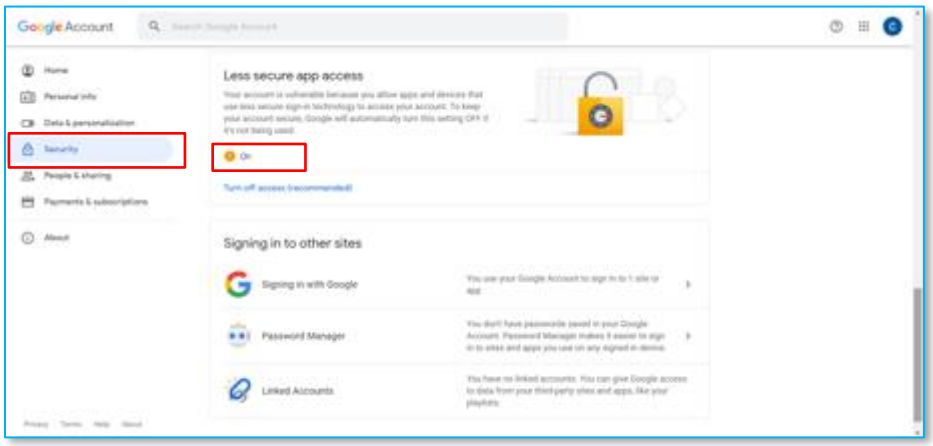
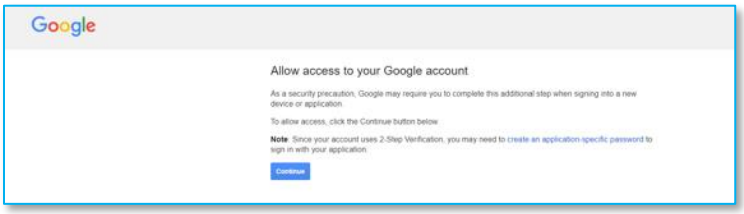
13.16 allow "less secure apps".



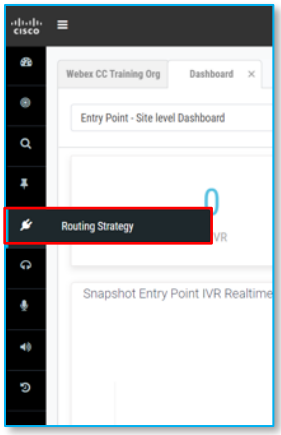
13.17 ☐ Within your Gmail account you should disable "captcha". Follow the link and hit "continue"

https://www.google.com/accounts/DisplayUnlockCaptcha



Provisioning an Email Entry Point Routing Strategy

13.18 ☐ Click on the *Routing Strategy Icon* as shown in the following picture. It will launch a new browser tab.



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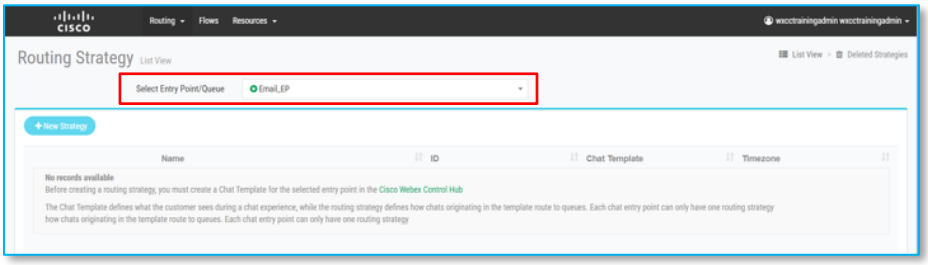
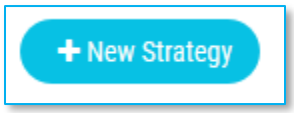
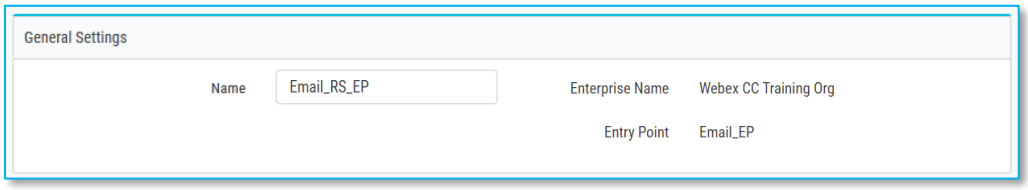
13.19☐ In the next page, select the Email Entry Point you created "ENTRY_POINT_EMAIL" from the dropdown.



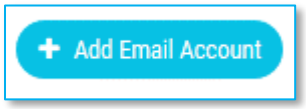
13.20☐ Click on "New Strategy".



13.21☐ Configure the RS Name as follows.



13.22☐ In the same page click on "Add Email Account".



In the new screen fill in the following values:

- **Email address (a gmail account is preferred)**
- **Username (for gmail it's your gmail email address)**
- **Password**

Leave all the other fields with the default values.

13.23☐ Click on "Save" in the "Add Email Account" screen.

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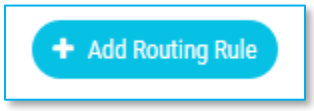
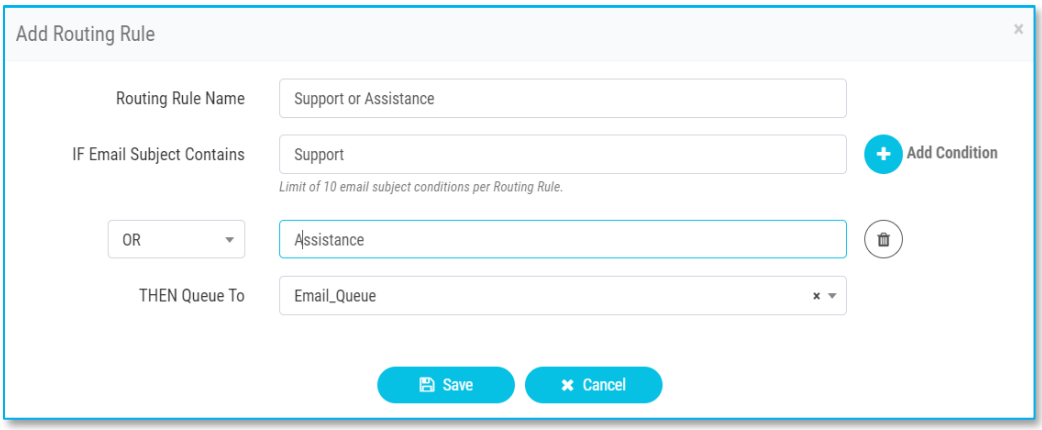
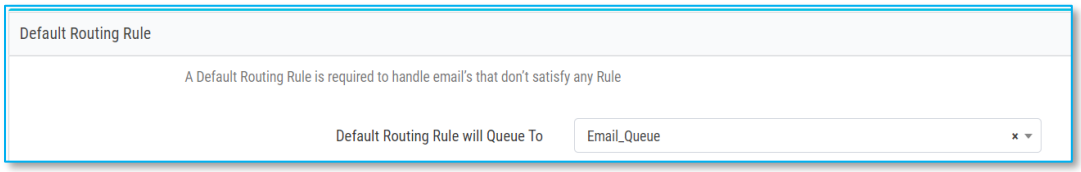
13.24 ☐ Under "Email Routing Rules" click on "Add Routing Rule".



13.25☐ In the "Add Routing Rule" page configure the conditions as shown in the new screenshot. And Click on "Save".



13.26☐ Under "Default Routing Rule" select the "Email-Queue".



13.27☐ Click on "Save" at the bottom of the page.

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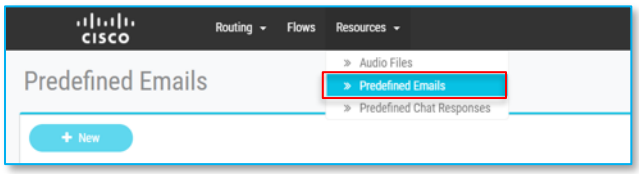
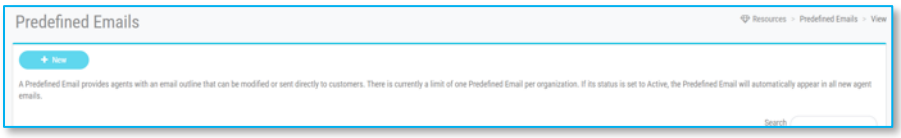
Configuring a Predefined Email Response

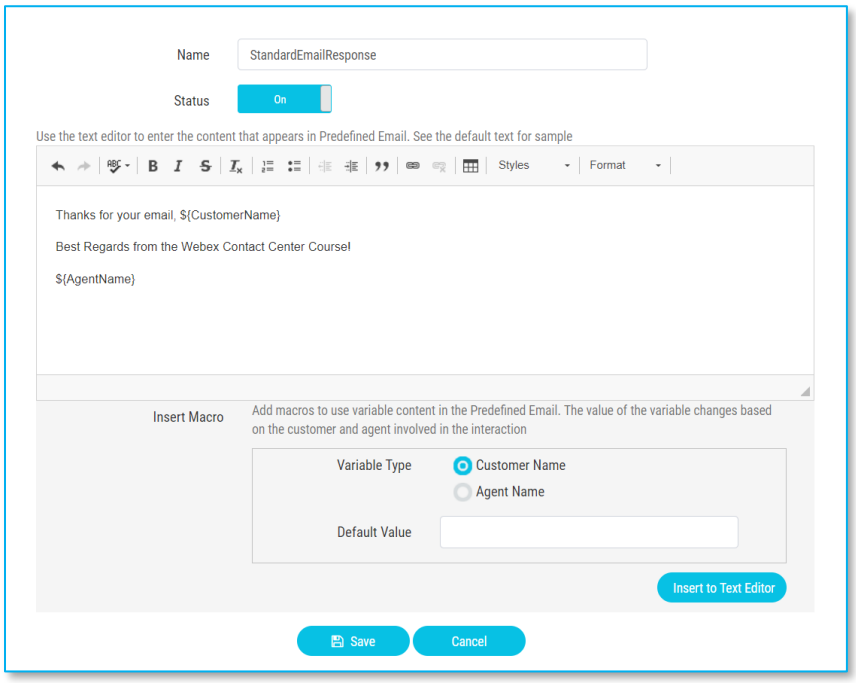
13.28☐ Click on "Resources" and then on "Predefined Emails".



13.29☐ Click on "+ New".



13.30☐ Modify the standard response as shown in the following picture.



13.31☐ Click on "Save".

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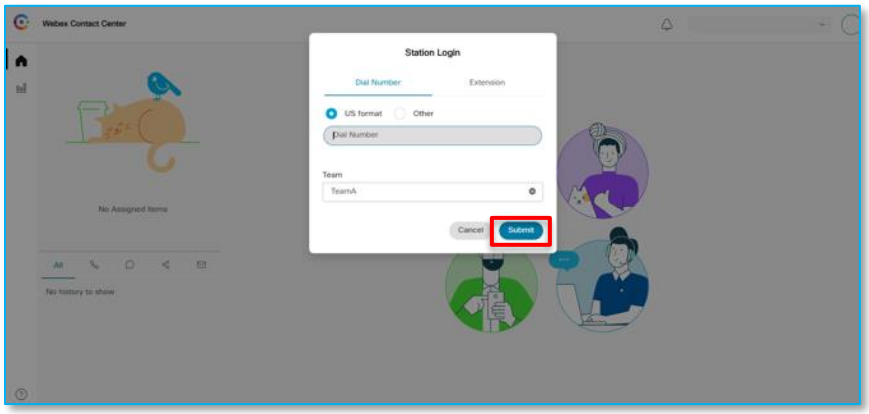
Testing Email Interactions

13.32☐ Make sure you are logged in as your CC Agent One. Please use a browser window opened in private/incognito mode.

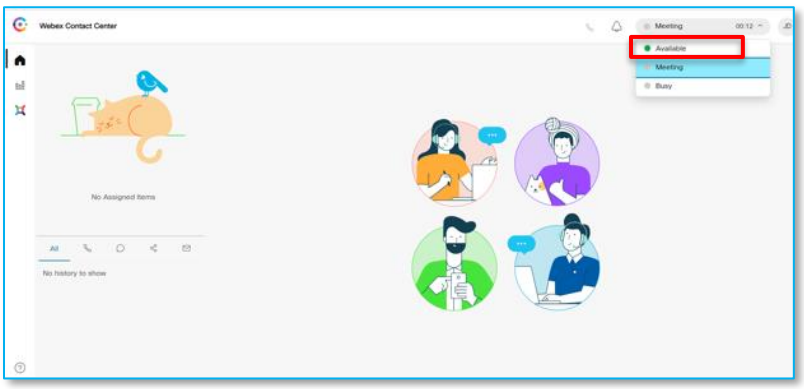
URL: https://desktop.wxcc-us1.cisco.com
Login: CC Agent 1's email address
Password: your password

13.33☐ In the next screen, provision your mobile phone number and check the corresponding radio button: either US format or Other (international).



13.34☐ Click on "Submit".

13.35☐ Now on the "Status Now" dropdown menu select "Available".



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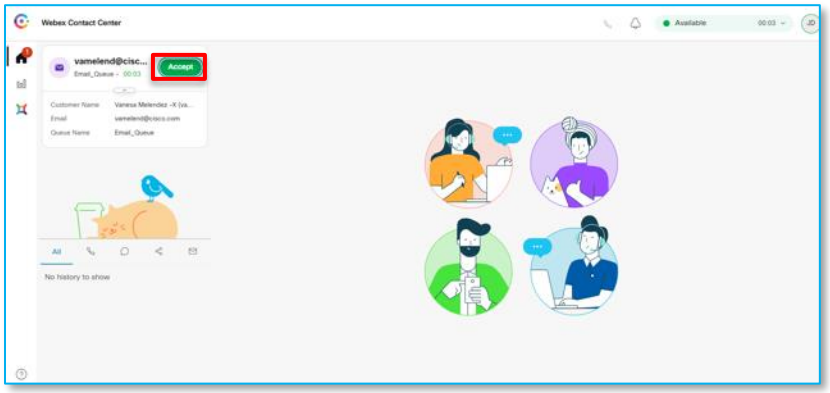
13.36☐ You may test the new Email Queue by sending emails from your email client to:

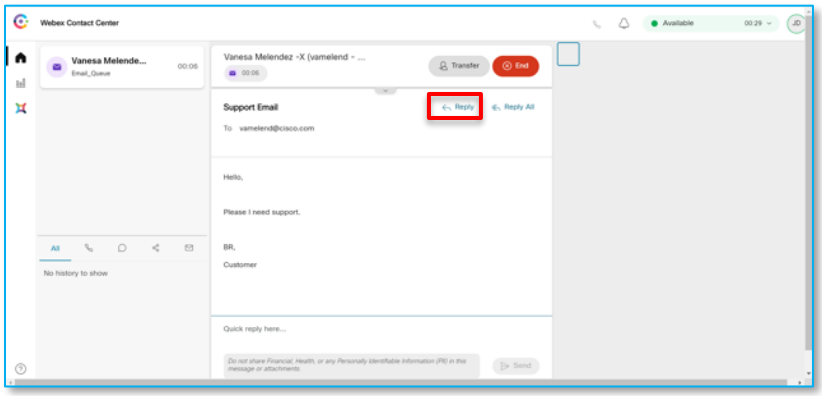
youraccount@gmail.com (the account you used for the EP Routing Strategy)

In the email subject you should have either "Support" or "Assistance" (case sensitive) or what you configured in the Entry Point Routing Strategy

13.37☐ Click on the "Accept" button.



13.38☐ Verify your email, and click on "Reply"



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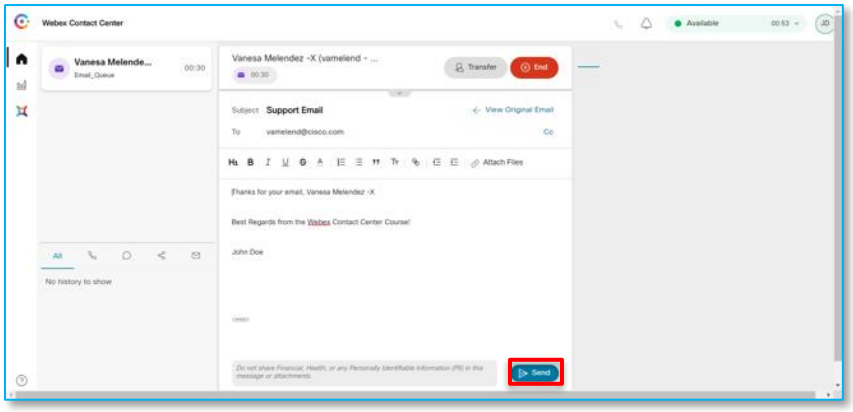
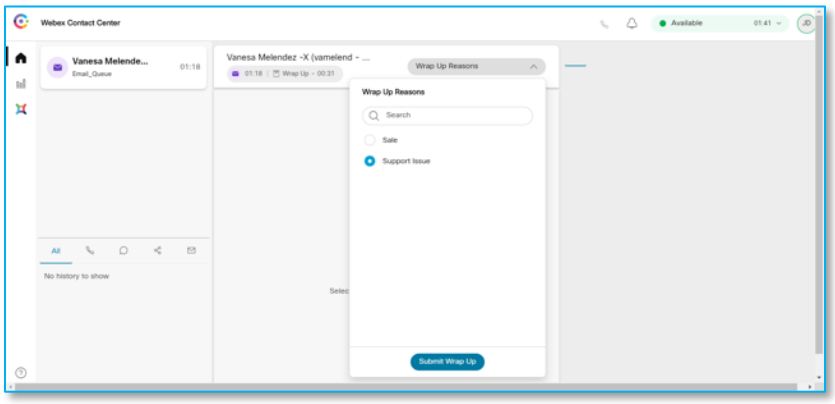
13.39☐ Notice that you will Reply with the Email Response configured in a previous step, and click on "Send"



13.40☐ Select one of the Wrap Up Reasons and click on "Submit Wrap Up"



STOP! ***Please do not proceed until instructed to do so.***

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14 Lab 14 – Configuring Chat

Purpose: configuring a Customer Support Chat, a Chat Entry Point, a Chat Queue, a Chat Entry Point Routing Strategy, an Chat Queue Routing Strategy.

Estimated execution time: 20 minutes.

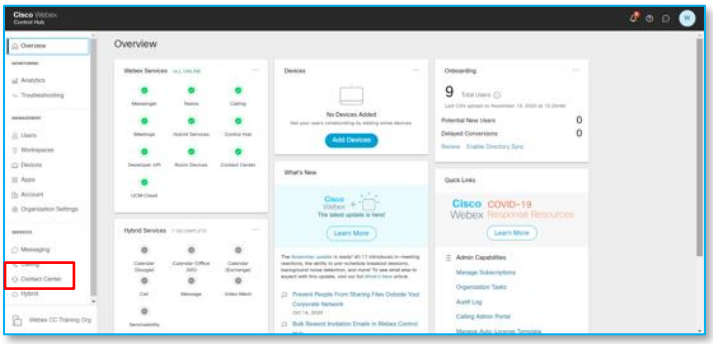
Entry Point Creation – Chat

It is now time to go to the Tenant Portal and configure a Chat Entry Point.

☐ **Log in to your Tenant.**

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

14.1 ☐ Once logged in then click "Contact Center" as indicated in the following picture.



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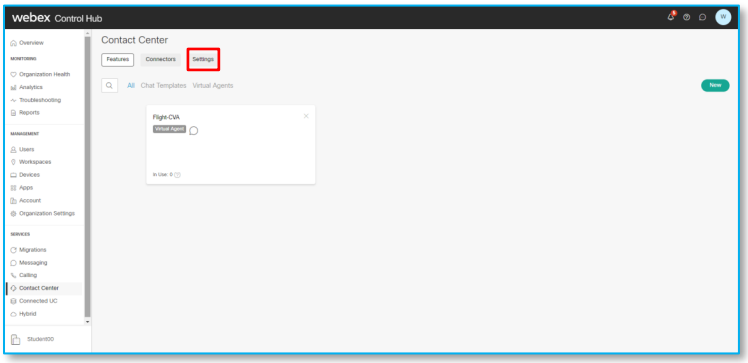
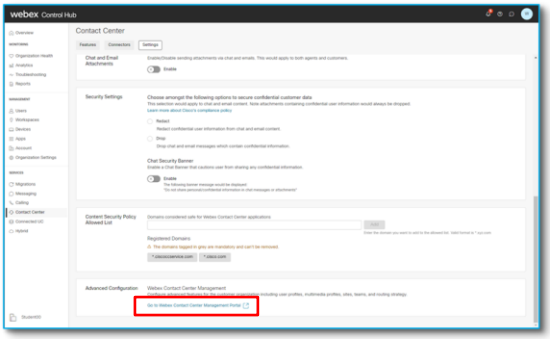
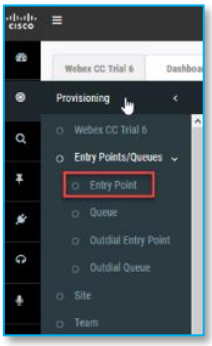
14.2 ☐ Click "Settings" on the horizontal menu bar.



14.3 ☐ Scroll Down and click on the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



14.4 ☐ Click on the "Provisioning" menu and then on "Entry Point".



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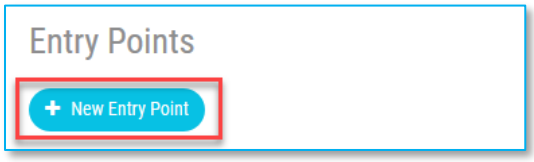
14.5 ☐ Click on "New Entry Point"



14.6 ☐ In the next page provision, the following values.

General Settings

Name	ENTRY_POINT_CHAT
Description	
Channel Type	Chat

Advanced Settings

Service Level Threshold	500
Time Zone (Routing Strategies Only)	*Default (Tenant Time Zone)*

14.7 ☐ Click on "Save".

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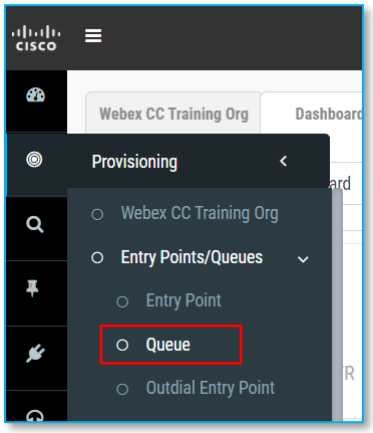
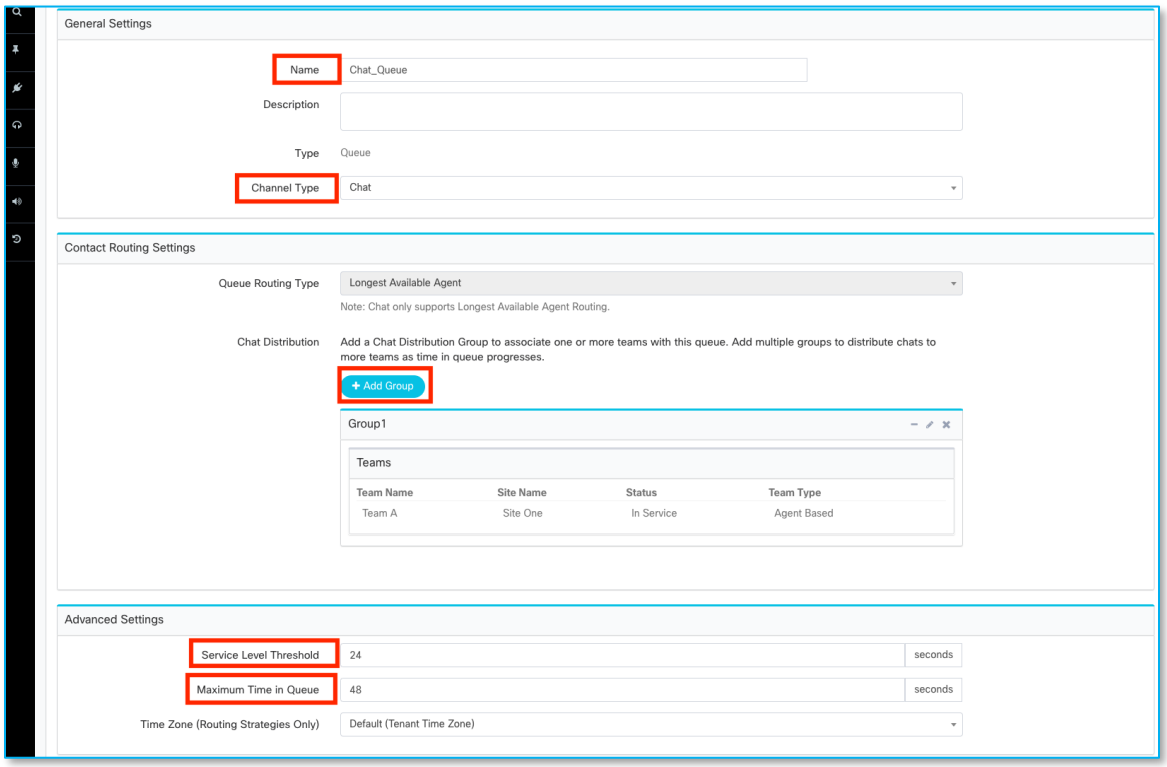
Provisioning a Chat Queue

It is now time to go to the Tenant Portal and configure a Chat Queue to route the chats we will receive.

14.8 Click on the Provisioning Icon then click on "Entry Points/Queues" and then on "Queue".



14.9 ☐ Provision the new Chat Queue as shown in the next picture.



14.10 ☐ Click on "Save".

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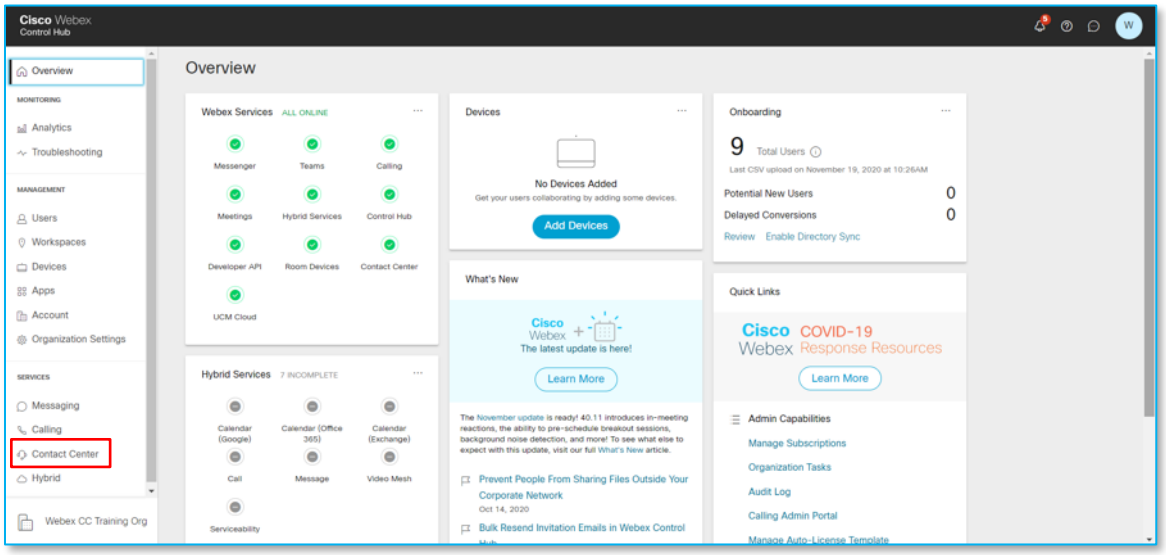
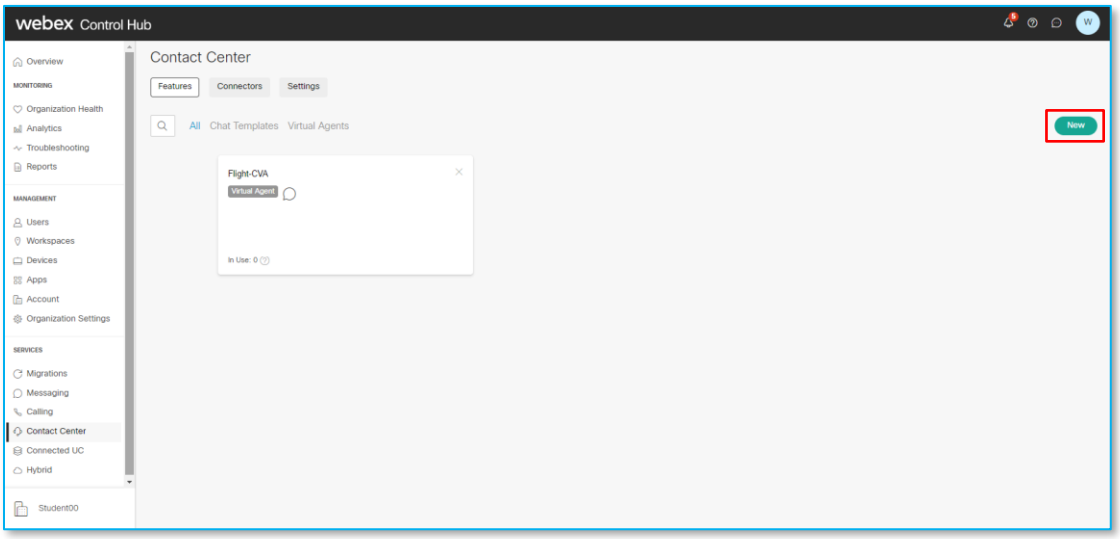
Customer Support Chat Provisioning

We will now configure a Customer Support Chat using the Customer Virtual Assistant we have just created.

14.11☐ Once logged in then click "Contact Center" as indicated in the following picture.



14.12☐ On features click on the "New" Button



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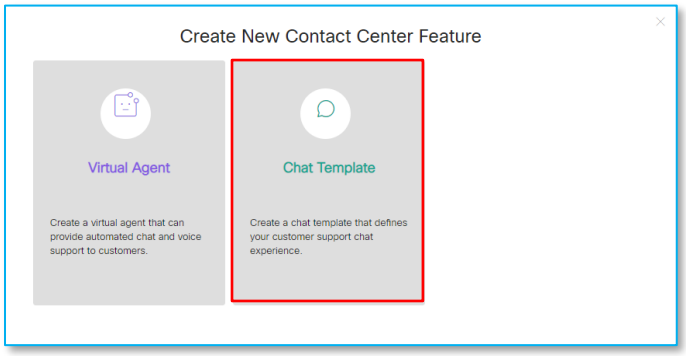
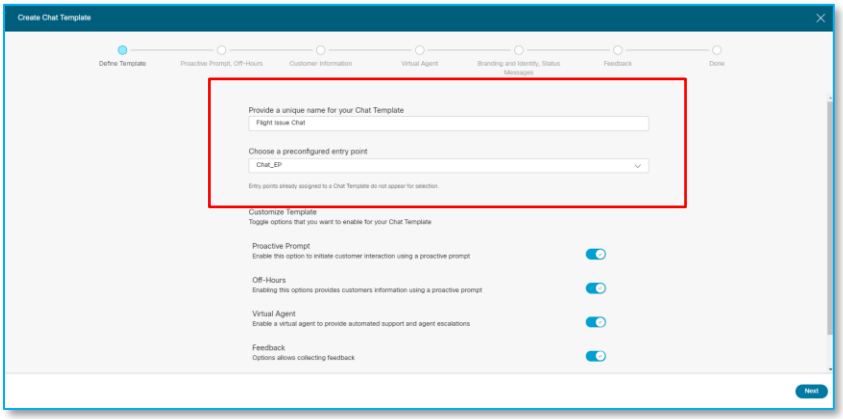
14.13☐ Click the "Chat Template" tile.



14.14☐ In the next screen name the Customer Chat Template "Flight Issue Chat" and select your Chat Entry Point, then click "Next".



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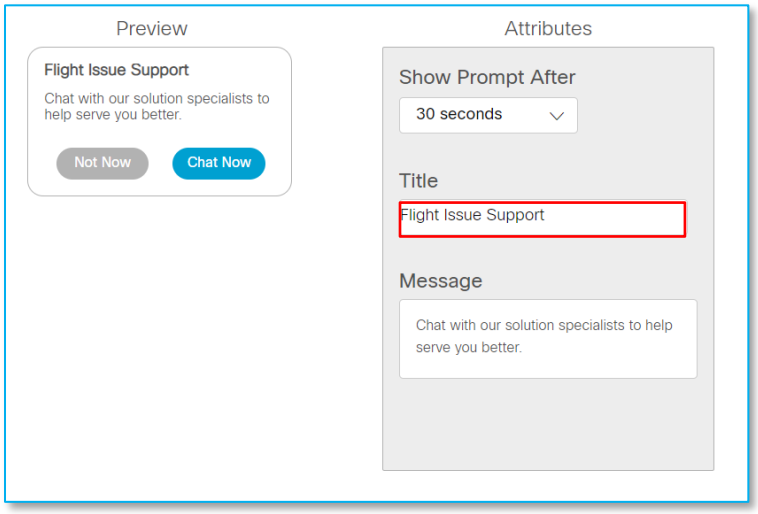
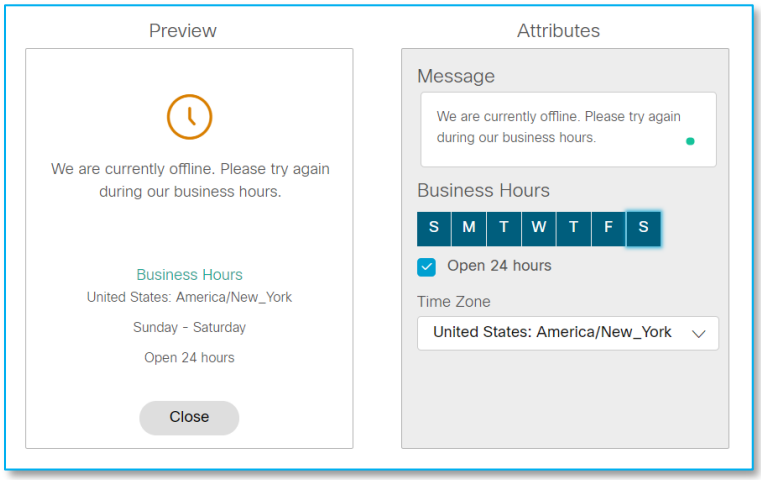
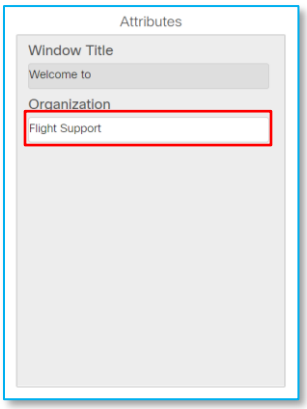
14.15☐ Configure the "Proactive Prompt" as shown in the next picture, scroll down and make sure that your Chat is open 24/7. Then click "Next".

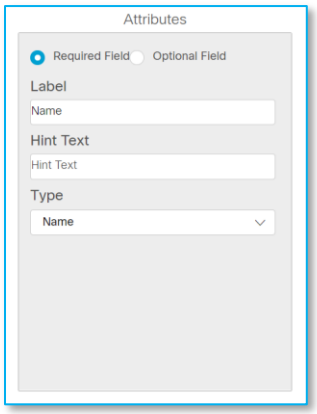


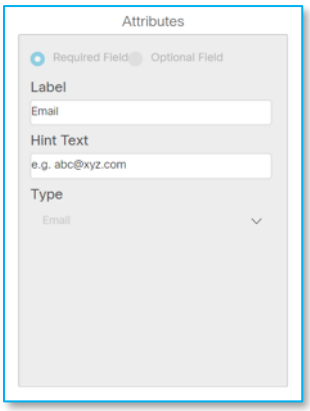


14.16☐ The "Customer Info" chat screen should be configured as follows.

By clicking on the "Preview" panel you can configure the "Customer Info" fields.







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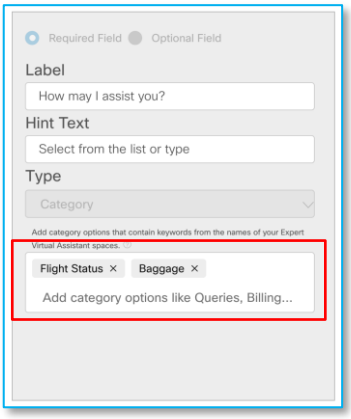
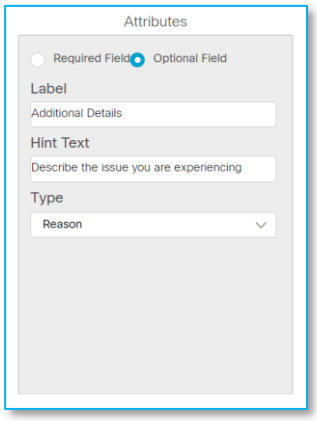
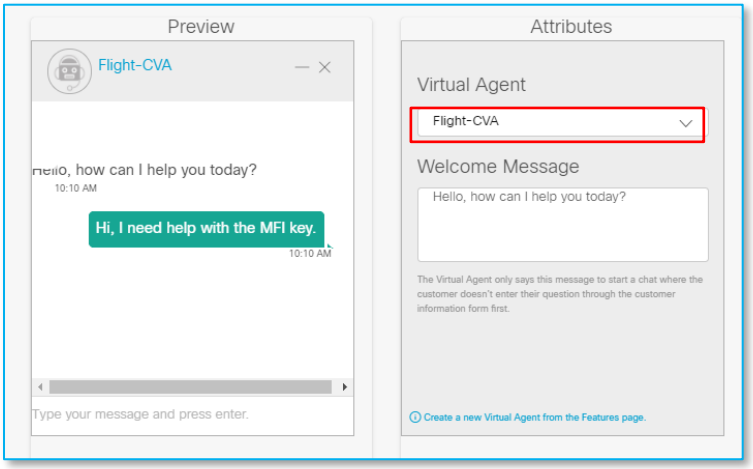




14.17☐ Click "Next".

14.18☐ Check that CVA you previously created has been selected and then click "Next".



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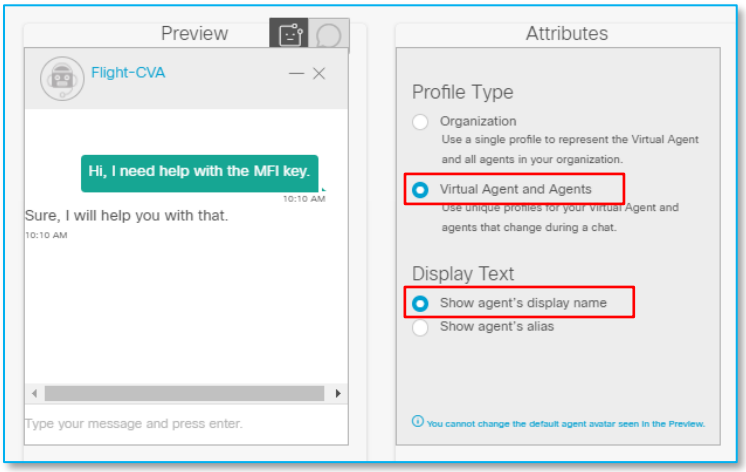
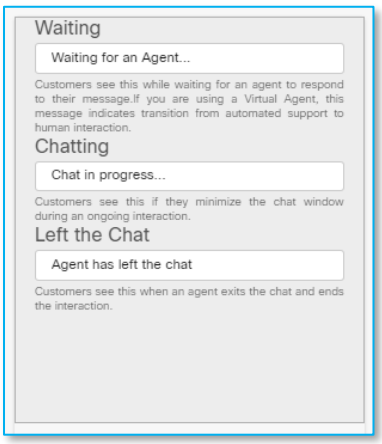
14.19☐ The "Branding and Identity" should be configured as shown in the next picture and then Scroll down the page.



14.20☐ Leave the "Status Messages" form with the default values and click "Next".



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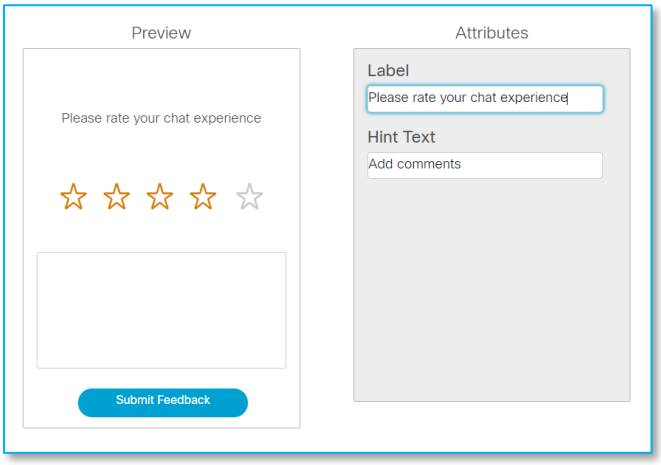
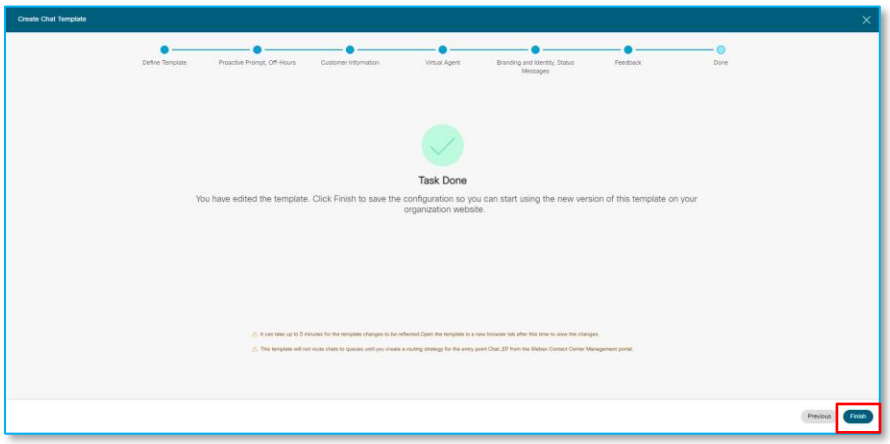
14.21☐ Leave the “Feedback” form with the default values and click “Next”.



14.22☐ Click on “Finish”.



14.23☐ A new screen will pop up showing the HTML code to be embedded in the Customer website.

Click on “Download Embed Code”.

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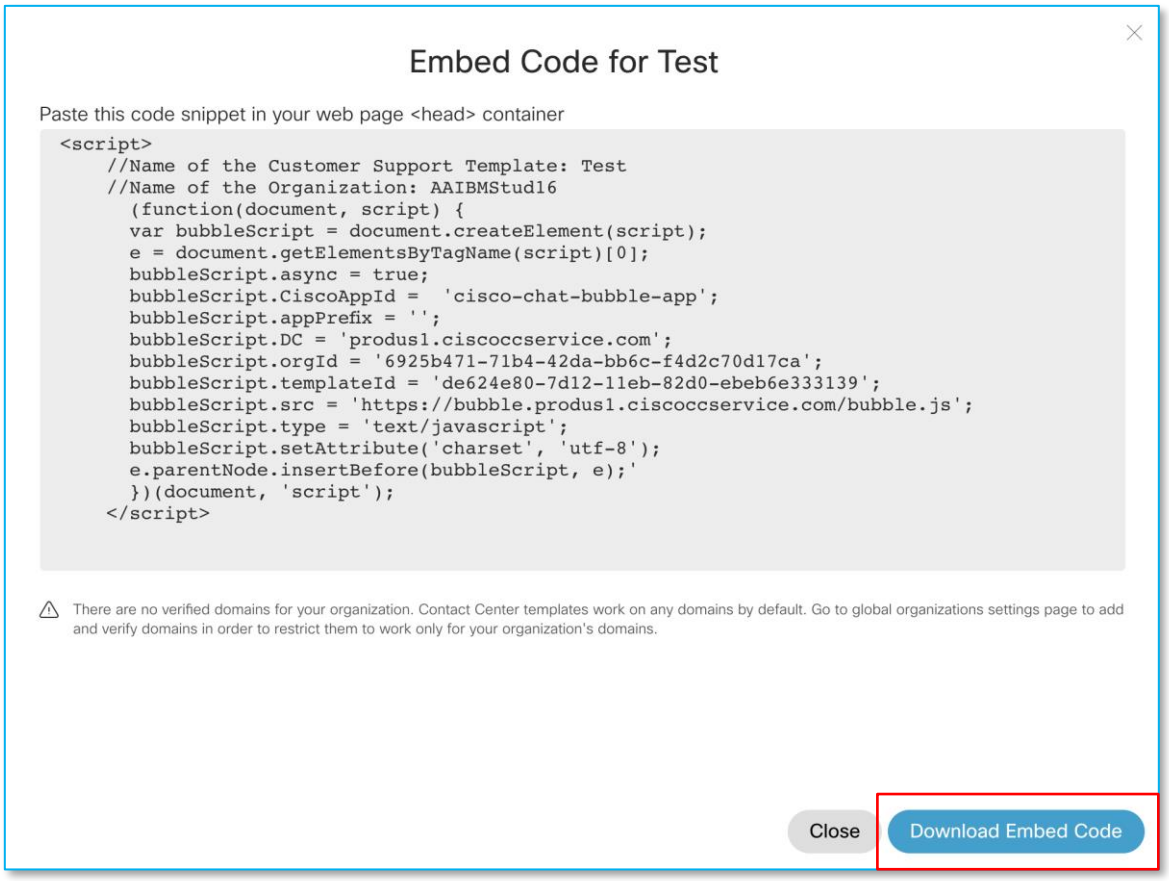

Save the Chat Embed Code in your computer as we will use it to emulate chats via our Test website “Cumulus” later.

14.24☐ Close the HTML code popup window.

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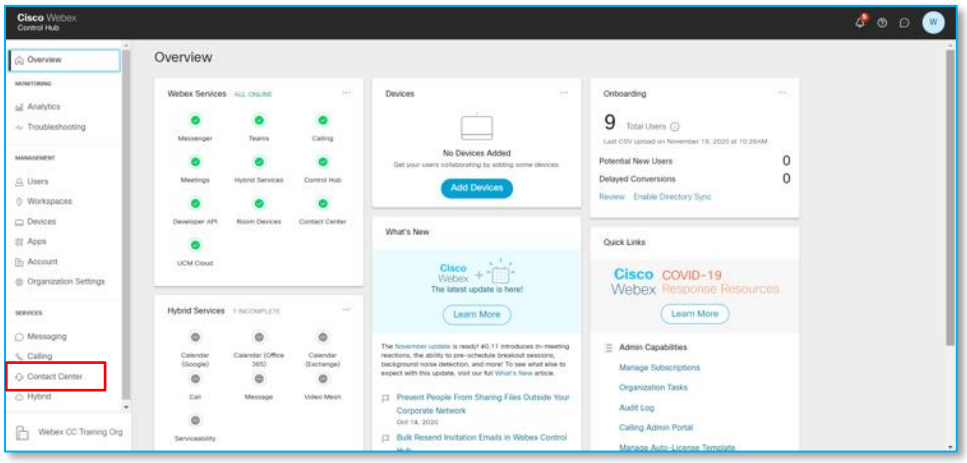
Provisioning a Chat Entry Point Routing Strategy

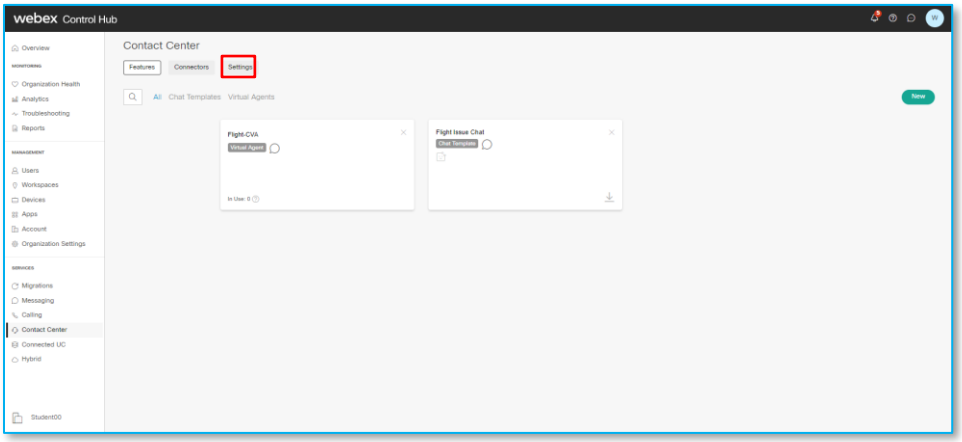
☐ **Log in to your Tenant.**

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

14.25☐ Once logged in then click "Contact Center" as indicated in the following picture.



14.26☐ Click "Settings" on the horizontal menu bar.



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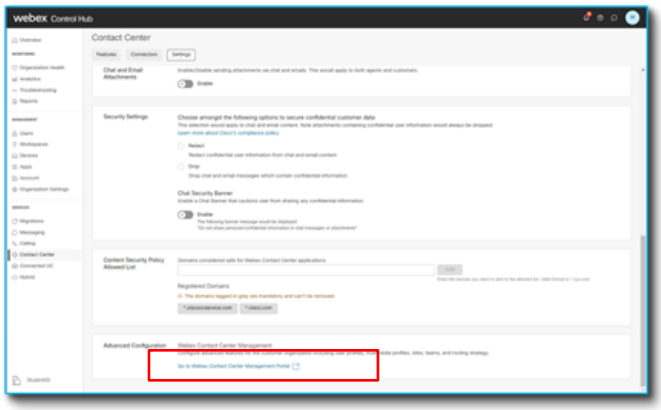
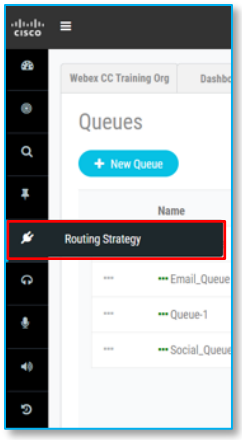
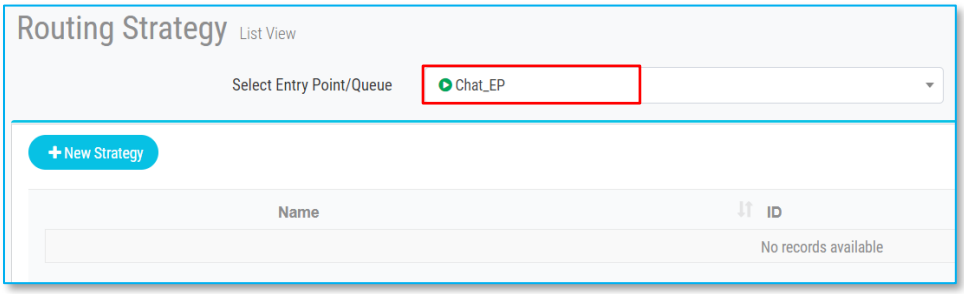
14.27☐ Scroll Down and click on the link "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



14.28☐ Click on the *Routing Strategy Icon* as shown in the following picture



14.29☐ In the next page, select the Chat Entry Point from the dropdown menu.



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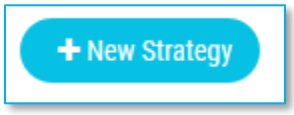
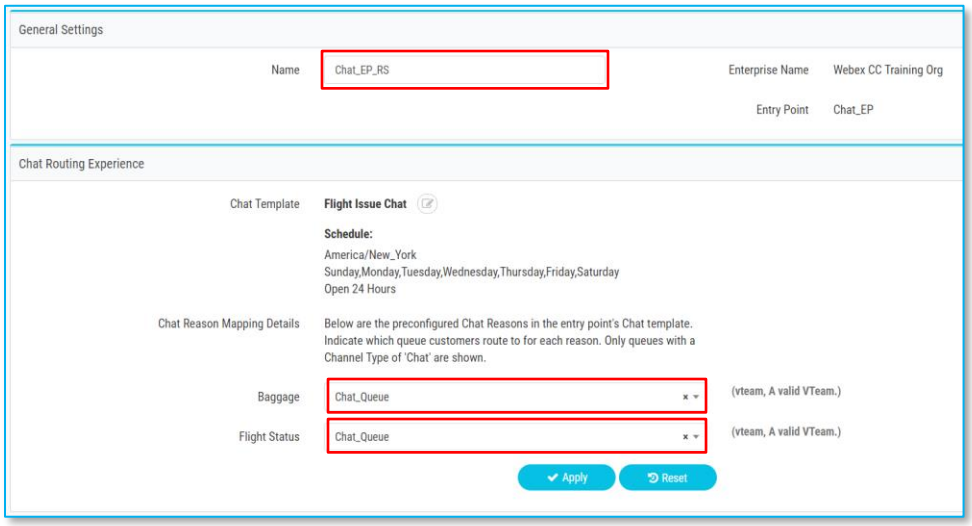
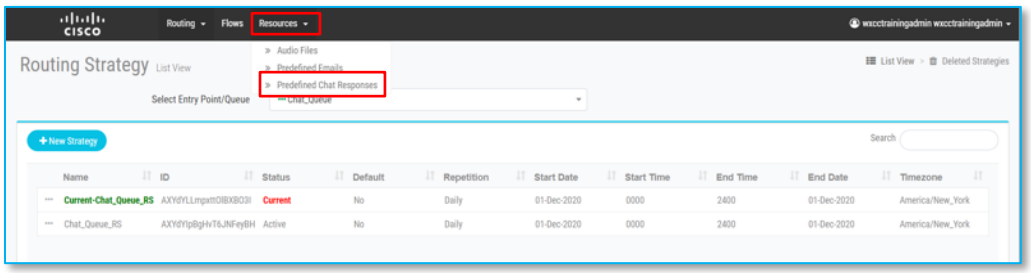
14.30☐ Click on "New Strategy".



14.31☐ Configure the Routing Strategy as follows and then click on "Apply" and then "Save".



14.32☐ On the top menu bar, click on "Resources" then on "Predefined Chat Responses"



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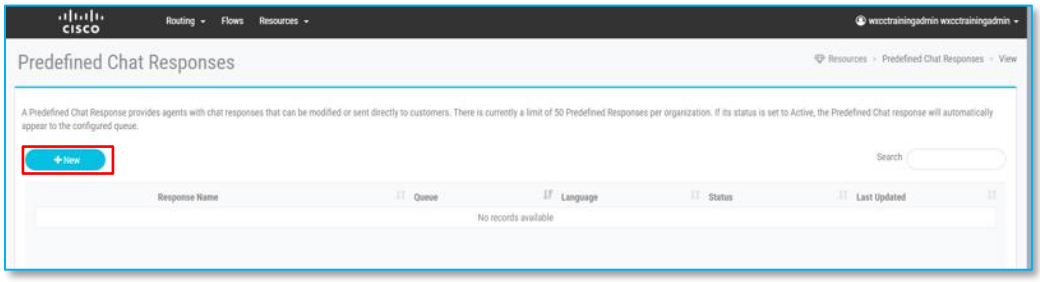
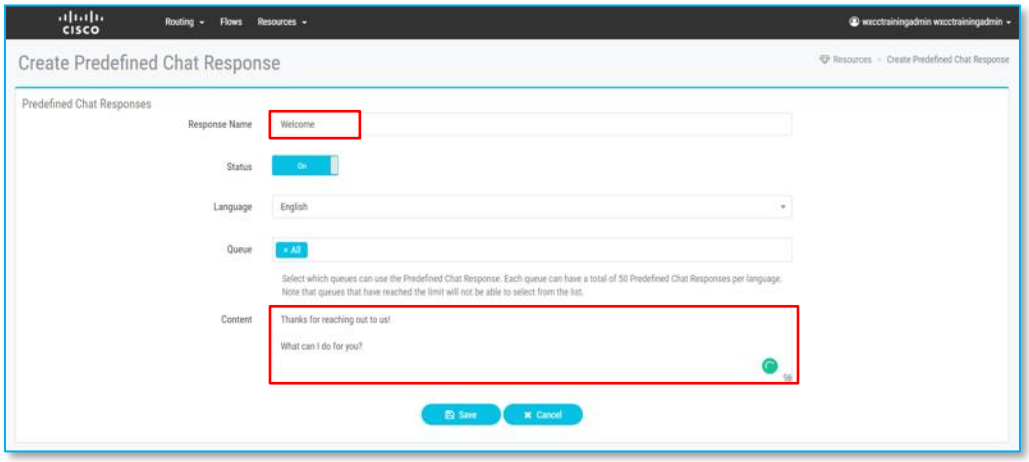
14.33☐ Click on “New” button.



14.34☐ Give a Response Name to the Predefined Chat Response, keep the Language as well as Queue settings, and fill out Content as indicated. Click on “Save”.



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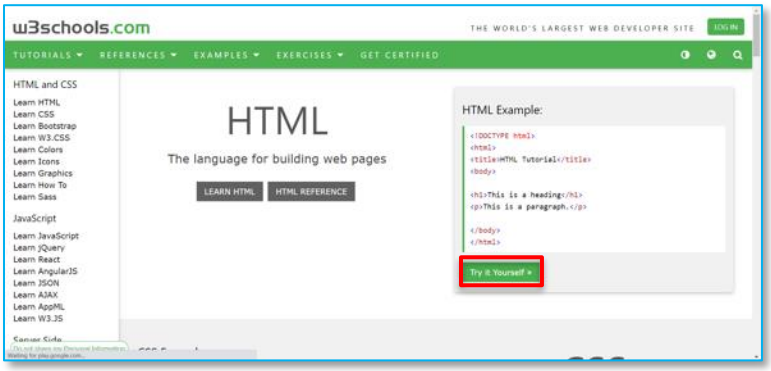
Testing Chat interactions

In a real customer scenario, the Chat Embed Code generated the Template should be included in a Customer website. It will display a Chat bubble in the website.

Any other website providing the possibility to inject HTML codes could be used to test Chat bubbles, e.g. https://www.w3schools.com

Recommendation: Disable the CVA first, test, and then enable it.

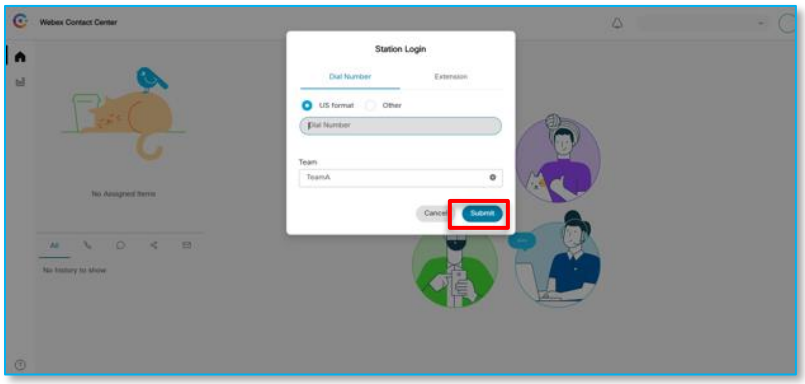
14.35 ☐ Browse to w3schools, and click on "Try it Yourself", we will use this later so keep it open.



14.36 ☐ Make sure you are logged in as your CC Agent One. Please use a browser window opened in private/incognito mode.

URL: https://desktop.wxcc-us1.cisco.com
Login: CC Agent 1's email address
Password: your password

14.37 ☐ In the next screen, provision your mobile phone number and check the corresponding radio button: either US format or Other (international). Click on "Submit".



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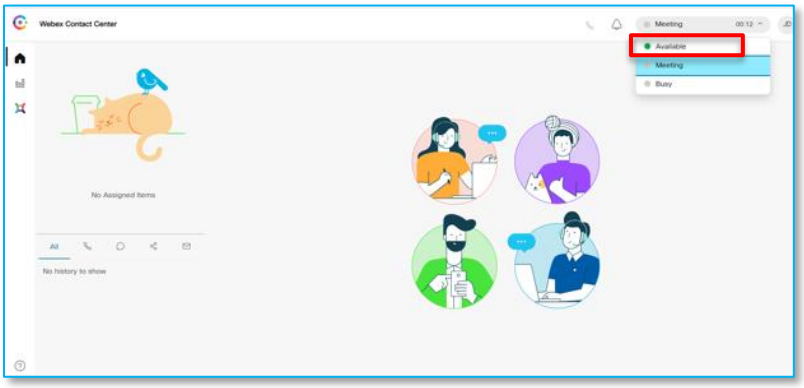
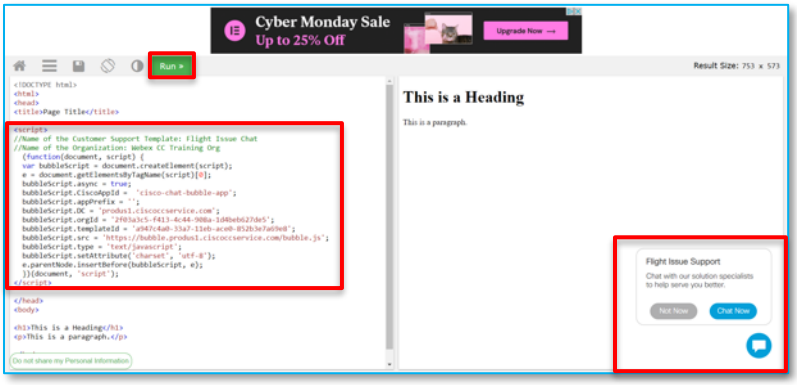
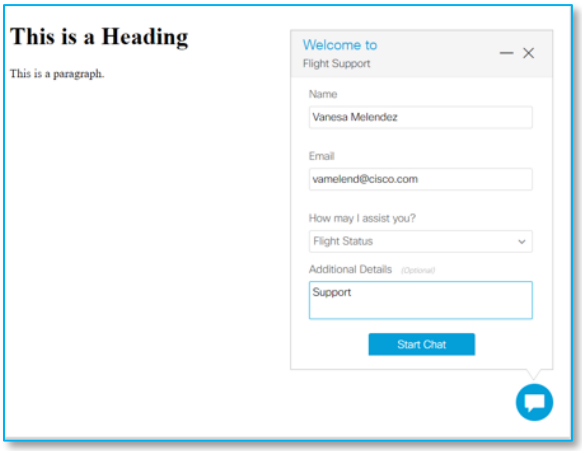
14.38☐ Now on the "Status Now" dropdown menu select "Available".



14.39☐ Paste the code snippet for the for Flight Issue Chat under <Title> row. Wait until you see a Chat bubble.



14.40☐ Fill out the Customer information. Click on "Start Chat", and send a message



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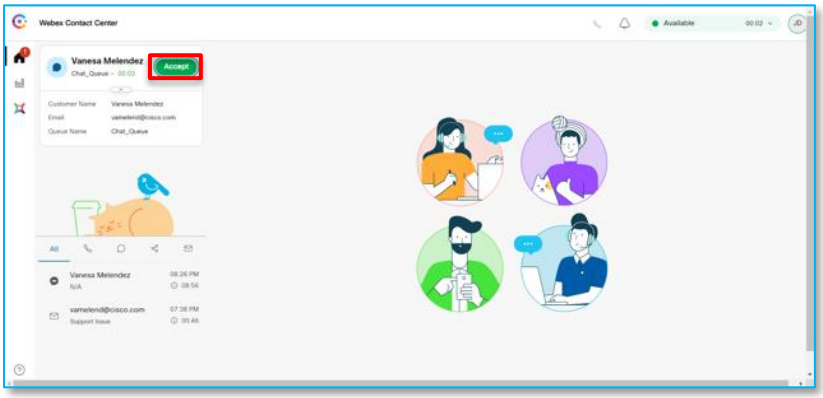
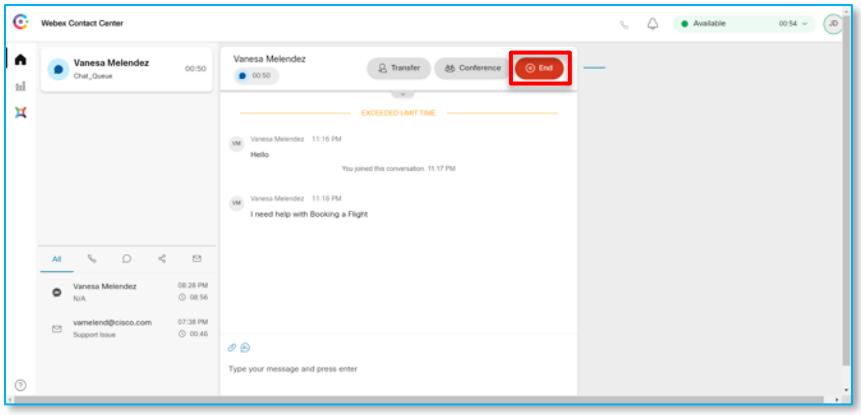
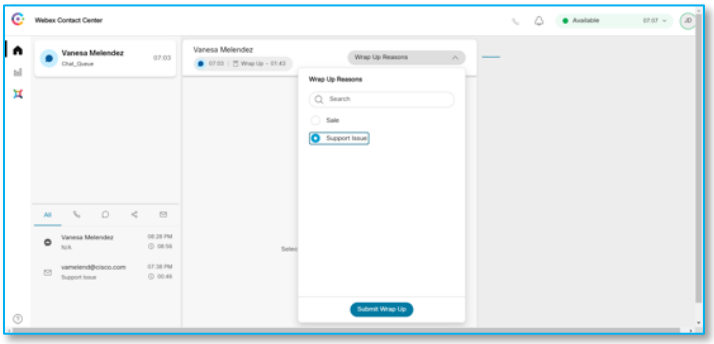
14.41☐ The Chat is then routed to your CC Agent. In the Desktop Agent click on the "Accept" button. And create a chat interaction.



14.42☐ When finished to chat, click the "End" button.



14.43☐ Select a Wrap Up Reasons, and click on "Submit Wrap Up".



STOP! ***Please do not proceed until instructed to do so.***

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15 Lab 15 – Analyzer

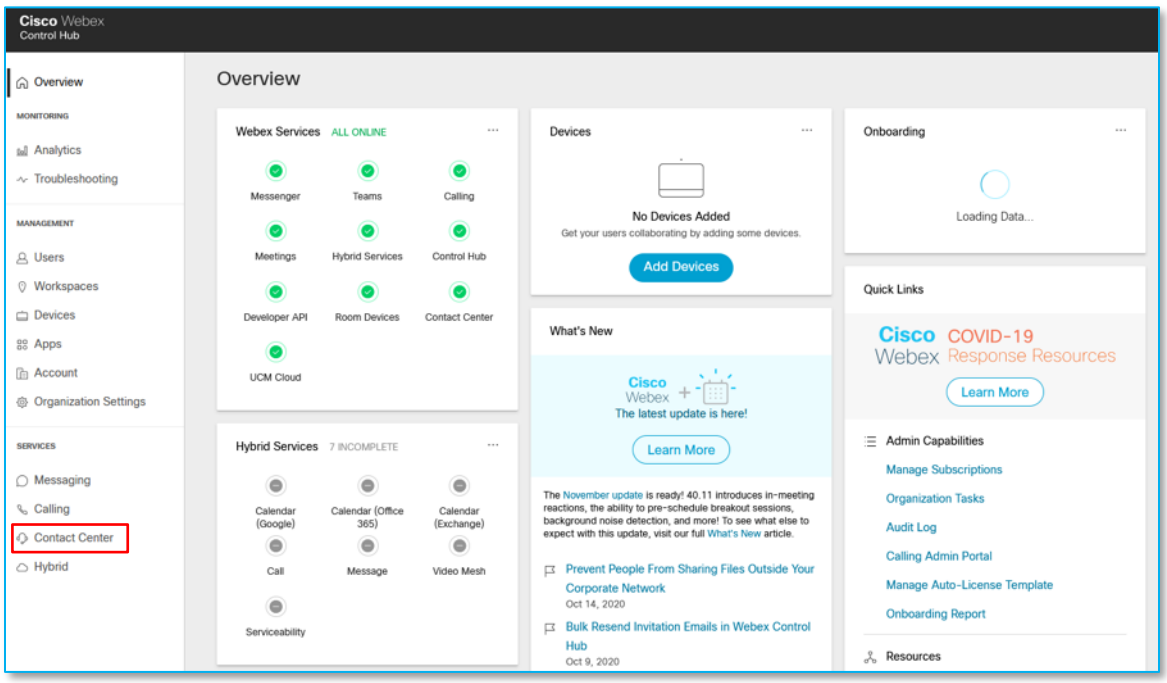
Purpose: creating a custom visualization.

Expected Completion Time: 20 minutes.

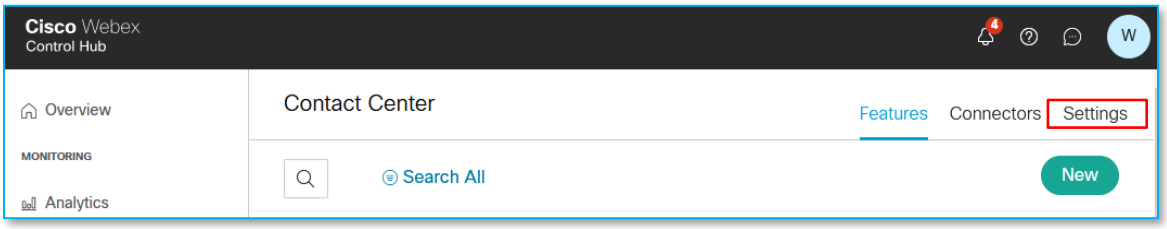
15.1 ☐ Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

15.2 ☐ Once logged in, then click "Contact Center" as indicated in the following picture.



15.3 ☐ Click "Settings".



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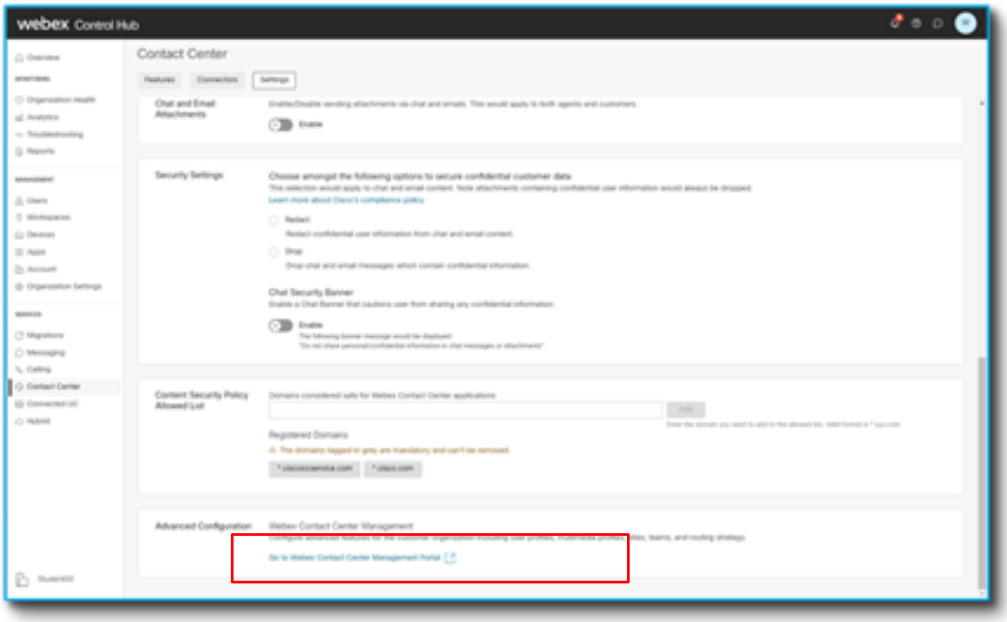
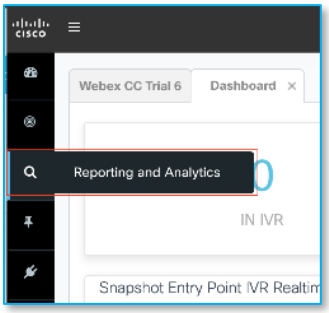
15.4 ☐ Scroll down to the bottom of the page to click "Go to Webex Contact Center Management Portal" to enter the Tenant Portal.



15.5 ☐ Click on the Analyzer Icon as shown in the following picture



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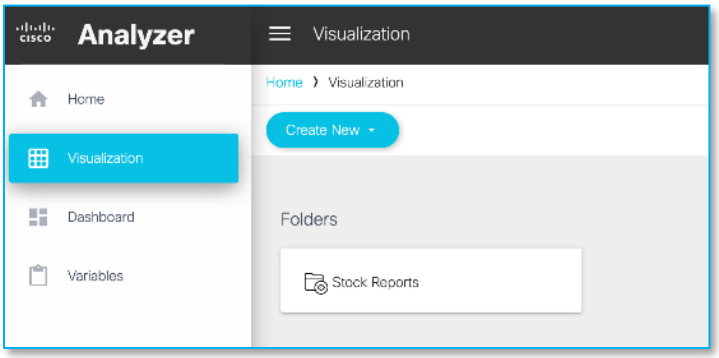
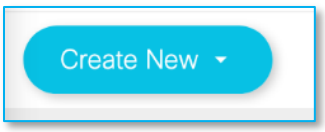
15.6 ☐ **In the new tab that is opened, click on "Visualization".**



Creating first Module: Average Active Email Agents per Team and Queue, each day of last week.

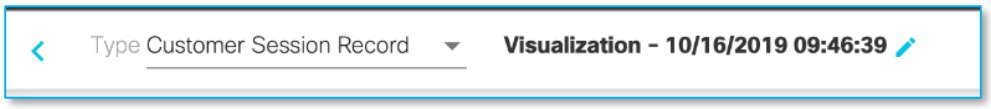
15.7 ☐ **Click on "Create New Visualization".**



15.8 ☐ **Modify the default visualization name clicking on the Pencil icon.**

The new Visualization Name shall be:

Visualization 1 – YourFirstName YourLastName



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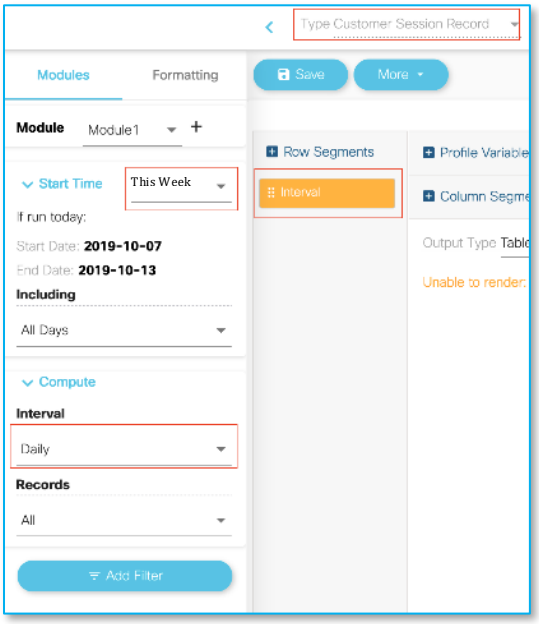
15.9 ☐ On the menu on the left, select the following values circled in red. Then drag the Interval box into the row segments column.



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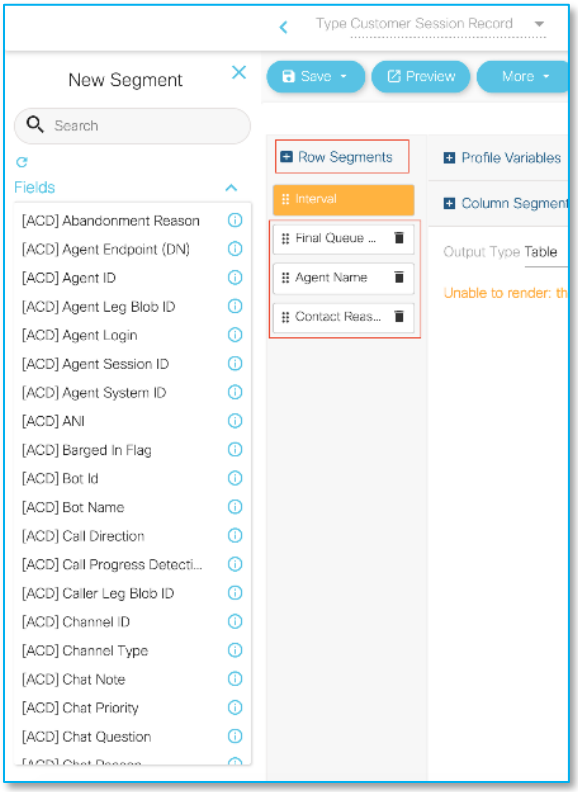
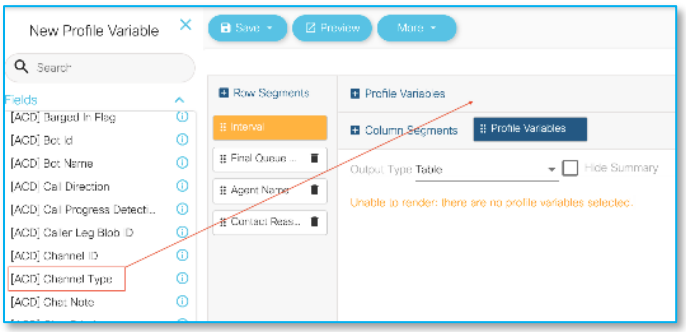
15.10☐ On the visualization configuration panel, make sure that "Table" is selected. Then by clicking on the + sign by Row Segments, drag over "Final Queue Name", "Agent Name" and then "Contact Reason" from under the Fields category.



15.11☐ Click on the + sign next to "Profile Variables" and select "Channel Type" from the Fields and drag it to the profile section.



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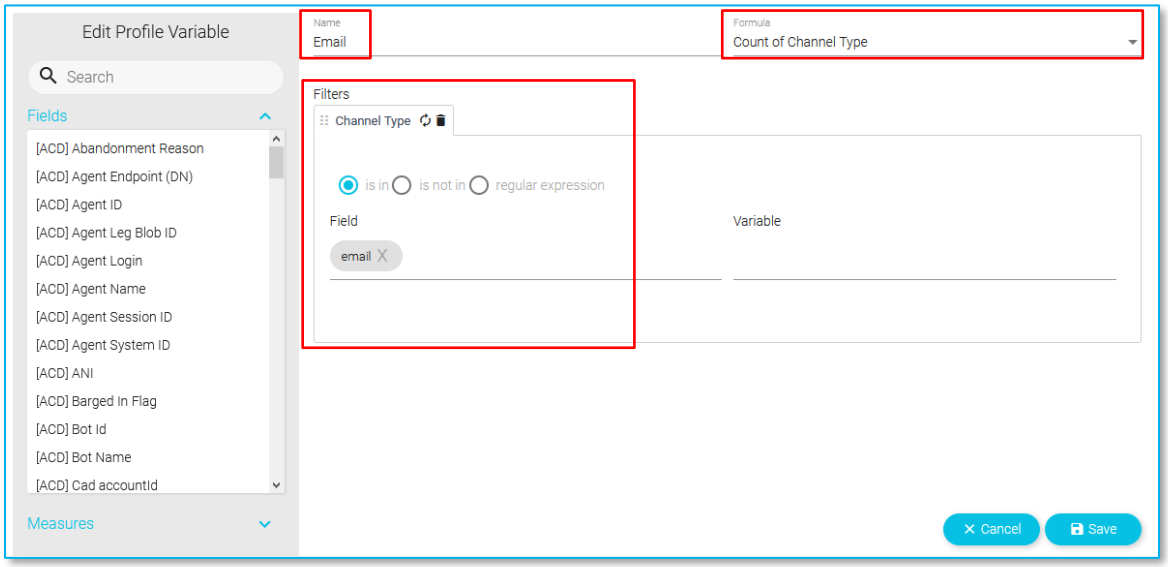
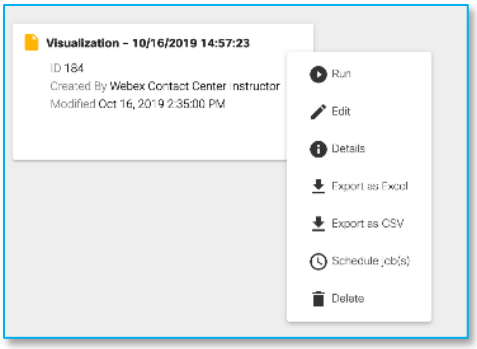
15.12☐ In the next screen rename the Profile Variable in "Email" and make sure that "Count of Channel Type" formula is selected. Then select "Channel Type" from the left menu and drag it to the Filters section. Click save. Repeat for a chat profile variable.



15.13☐ Click on "Save".

15.14☐ Click on "X".

15.15☐ Run your Virtualization by clicking on the three dots and selecting "Run".



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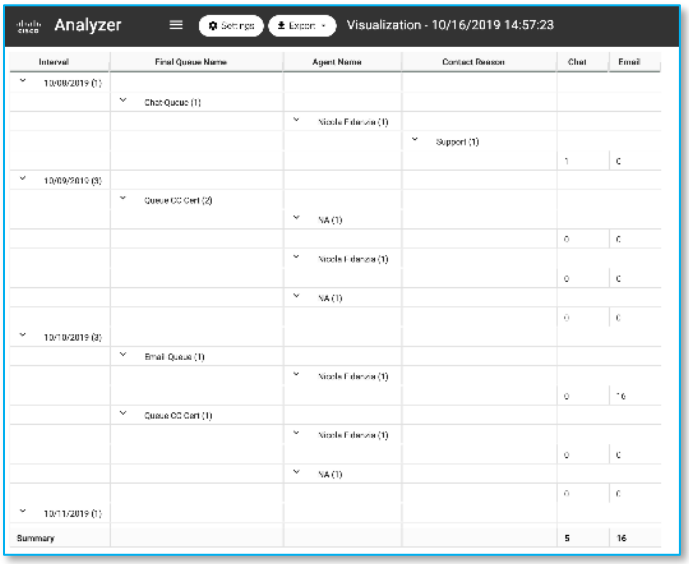
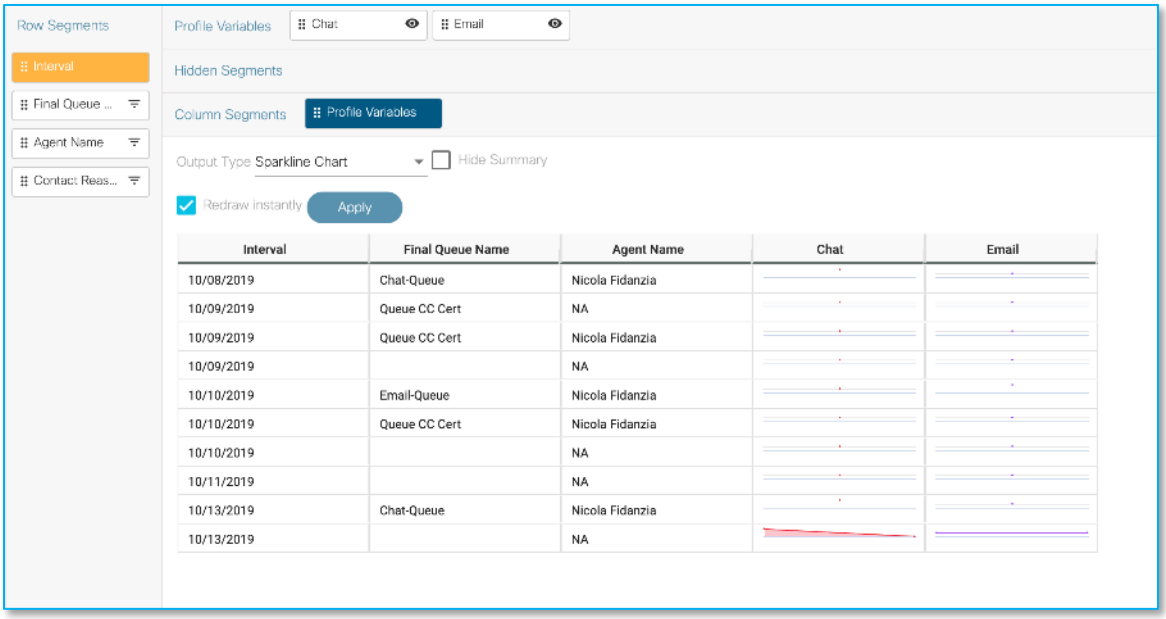
15.16☐ Expected Result. Your Visualization should look similar to the following one.



15.17☐ Now you can change the type the output format by clicking on "Settings", then output type, as shown in the next picture. Select "Sparkline Chart".



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15.18 ☐ Close the Tab to exit the Visualization.

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16 Lab 16 – Analyzer Standard Reports

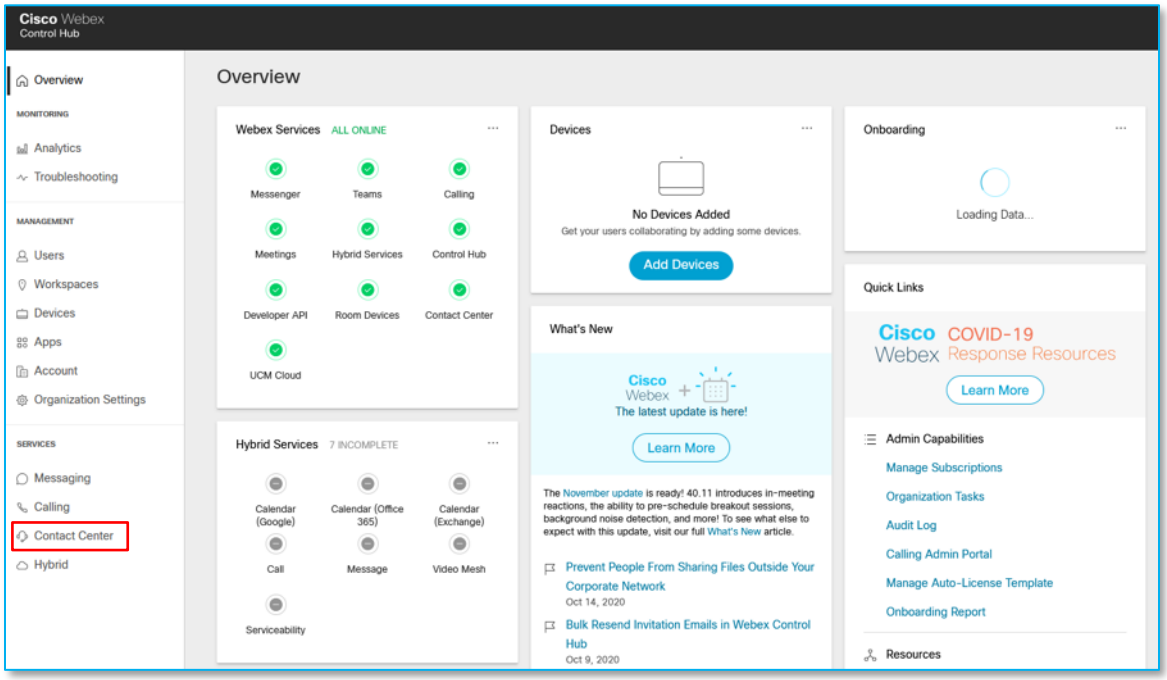
Purpose: Create a custom Visualization.

Expected Completion Time: 15 minutes.

16.1 Open your browser and go to

URL: https://admin.webex.com
Customer Org Admin
User: Your assigned Customer admin

16.2 ☐ Once logged in, then click "Contact Center" as indicated in the following picture.



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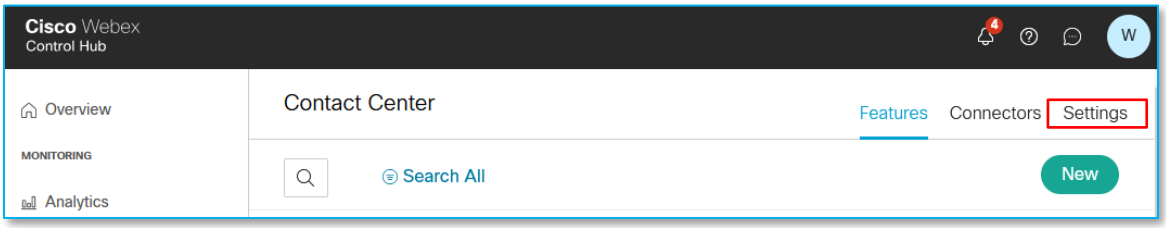
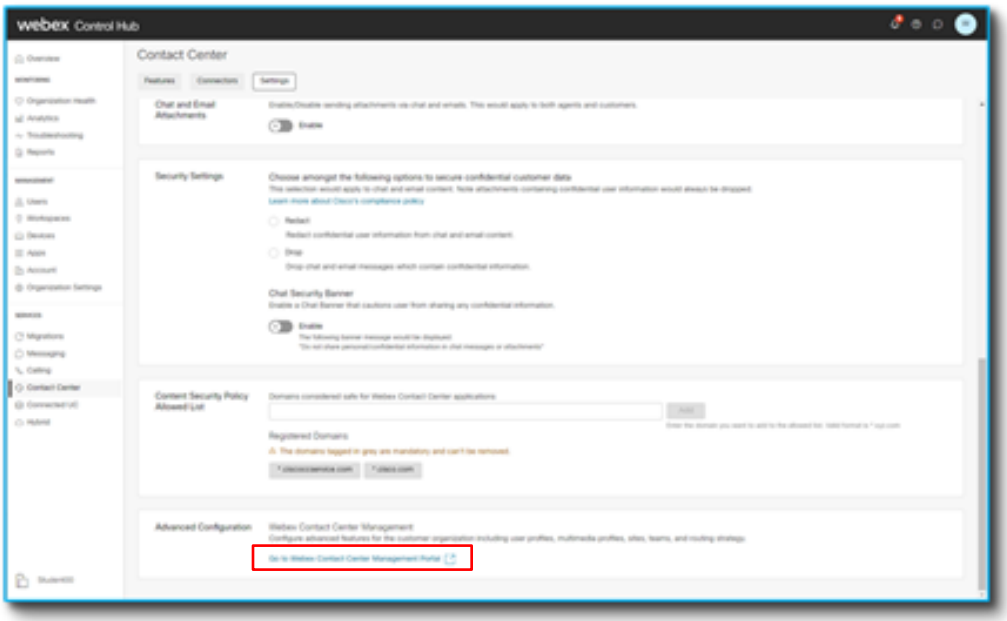
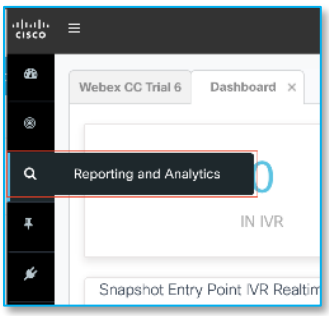
16.3 ☐ Click “Settings”.



16.4 ☐ Scroll down to the bottom of the page to click “Go to Webex Contact Center Management Portal” to enter the Tenant Portal.



16.5 ☐ Click on the Analyzer Icon as shown in the following picture



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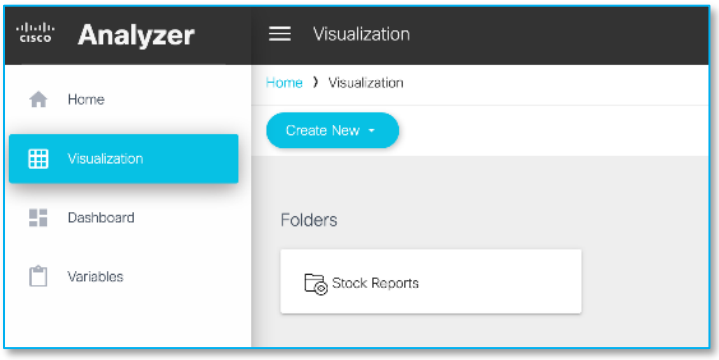
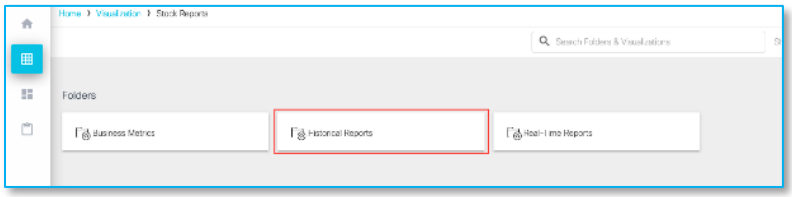
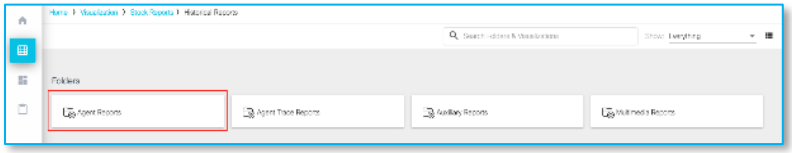
16.6 ☐ Click on “Stock Reports”.



16.7 ☐ Click on “Historical Reports”.



16.8 ☐ Click on “Agent Reports”.



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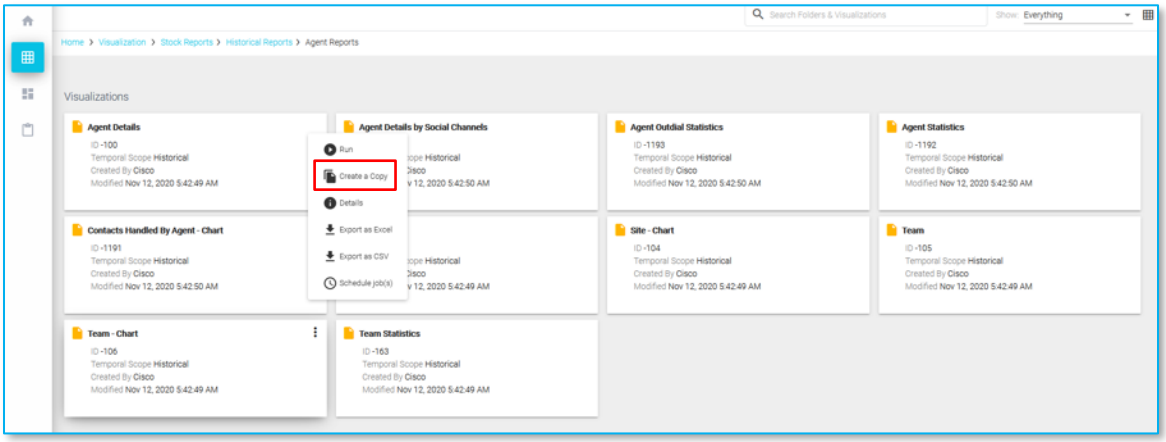
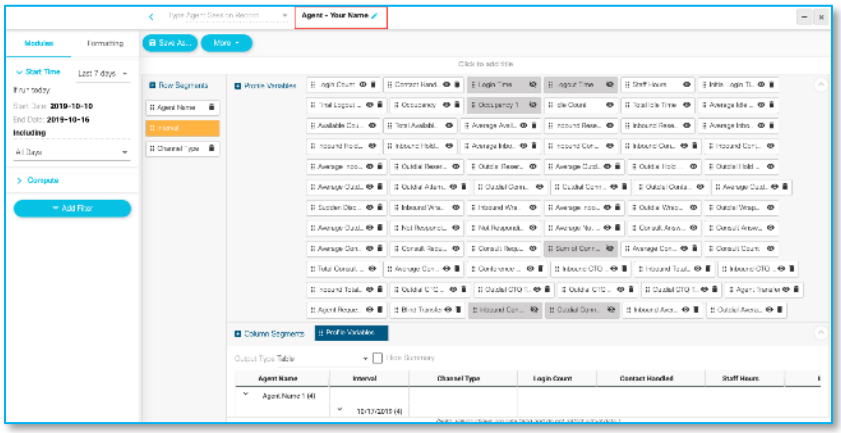
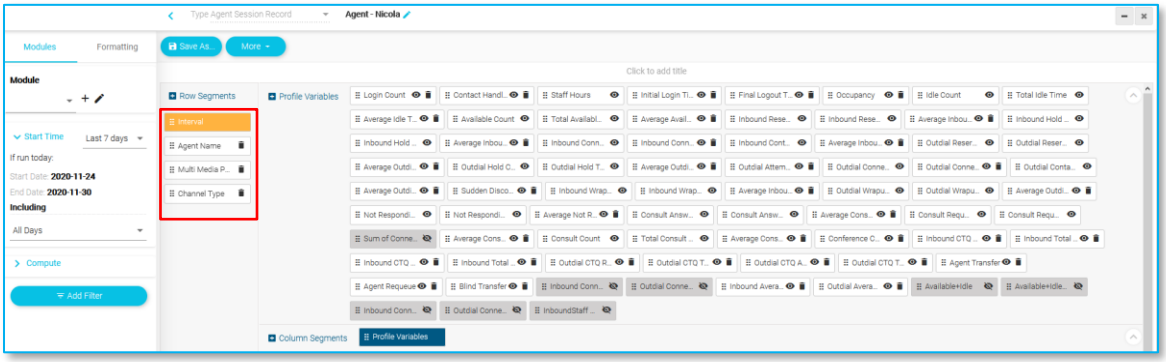
16.9 ☐ Click on the three dots of the Agent Details report and select "Create a copy".



16.10☐ Click on the pencil icon and change the names of the report to "Agent – (Your Name)".



16.11☐ Change the order of "Interval" and "Agent Name" under row segments.



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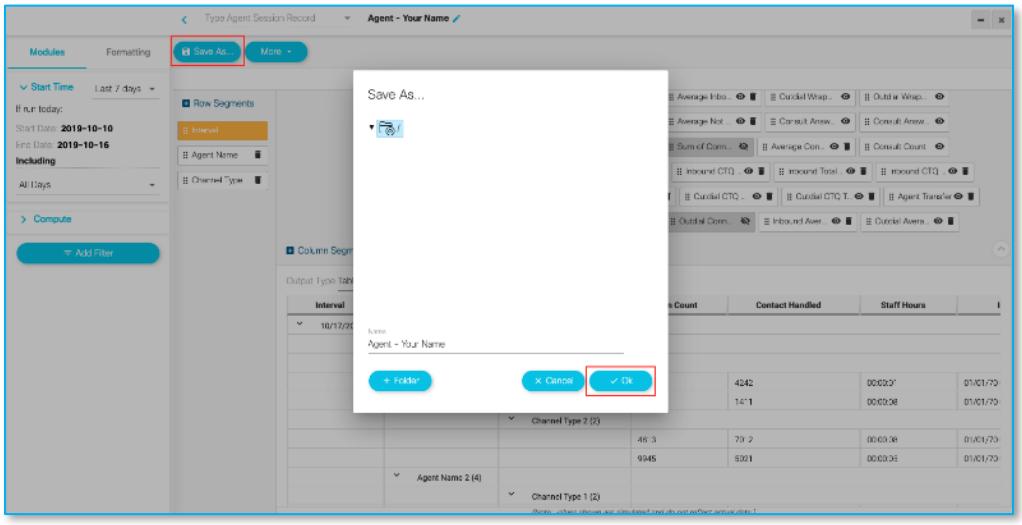
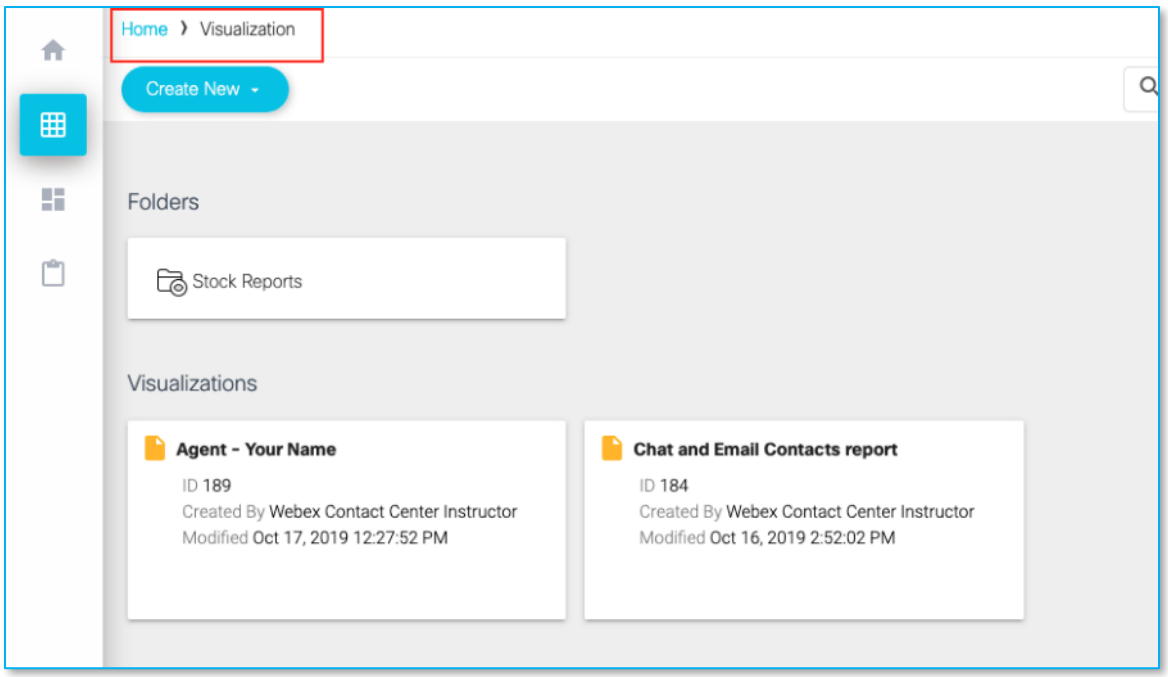
16.12☐ Click on “Save As” then “OK”.



16.13☐ Click on the “x”.

16.14☐ Navigate to “Visualization” and your custom report should be there.



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