Enghouse Interactive

Contact Center as a Service

Provisioning Portal Administrator Guide

Contents

1: Intro

This document is for landlord and tenant administrators who configure the CCaaS Provisioning Portal templates (landlord only) and tenant services.

What's new

- Log in — if the Provisioning Portal UI version and the PrP API version do not match, the *Incorrect API version* warning appears on the login page.
- Log in using Unified Admin — Unified Admin is a portal application for tenant administrators that presents the administration applications you are allowed to access.
- Log out — if you logged in using Unified Admin, when you click **Logout** in the Provisioning Portal, the **App Selector** page appears.
- Auto SQL update — enhanced the PS.TscSvc service to ensure that the Tenant creation service automatically performs the necessary Provisioning Portal SQL updates upon startup.
- Working hours — you can now configure Working Hours for custom chat across different time zones, and this feature is also compatible with the Social Connector.
- Change Audit — added a new Change Audit feature that enables landlords or tenant administrators to review detailed information about recent SQL changes. This includes execution details of stored procedures and their parameters, all accessible through the Provisioning Portal.
- Addons Parameters — the latest version of the Provisioning Portal introduces addons configuration, which allows landlords or administrators to customize and configure a set of CCSP addon modules directly through the Provisioning Portal interface.

Legal disclaimer

This document is governed by the terms of the software license agreement and applicable contract (including addendums) entered into with Enghouse.

Support

To submit comments or questions about the information in this guide, please open a case with Enghouse Interactive Support.

2: Overview

This chapter contains the following information:

- Configuration process
- Clear your browser's cache
- Log in
- Log in using Unified Admin
- Landlord view
- Tenant view
- Submit a tenant subscription request
- Log out

This section provides a high-level view of the configuration process. It describes how to clear your browser's cache, log in to the Provisioning Portal, and the landlord and tenant views of the Provisioning Portal window. It also describes how to submit new tenant subscription requests.

Configuration process

Provisioning Portal is an application for defining tenant templates and for administering tenant services.

The portal has three types of users:

- **Landlord administrators** - authorized for tenant-wide level administration for all the tenants listed on the Tenants page. The landlord administrator can make changes for any tenant in the same way as the respective tenant administrators.
- **Tenant-wide administrators** - authorized for tenant-wide level administration for the respective tenant.
- **Supervisors with permission profile** - authorized for administration of selected items according to the source permission profile of the respective tenant, set in the individual **Permission Profiles** dialogs.

Clear your browser's cache

We recommend that you clear your browser's cache to ensure that Provisioning Portal loads efficiently.

> **Note**
> It is mandatory to perform this task after each Provisioning Portal upgrade.

If you use Chrome, to clear your browser's cache:

1. On the Chrome menu, click **Settings**.
2. Click **Show advanced settings**.
3. Under **Privacy**, click **Clear browsing data**.
4. In the **Clear browsing data** dialog box, select the time period, select the **Cached images and files** check box, and then click **Clear browsing data.**

Log in

See also Log in using Unified Admin.

The log in process is slightly different depending on the URL you use for Provisioning Portal and the identity provider configured by your administrator.

> **Note**
>
> - If the Provisioning Portal UI version and the Provisioning Portal API version do not match, the *Incorrect API version* warning appears on the login page.
> - Admin users can open several tabs in the same browser with one login.
> - If you log in again after your CCaaS application session becomes invalid, and while your ADFS or EIS provider's session is still valid, you do not need to type your password.

1. In your browser, in the **Address** bar, type the URL supplied by your supervisor or administrator, and then click **Go** or press **Enter**. The **Welcome to Provisioning Portal** page briefly appears.
   If you are already logged in, the main **Provisioning Portal** page will appear.

> **Note**
>
> If you previously logged in using Unified Admin, the  **App Selector** button appears at the top left of the main **Provisioning Portal** page.

2. If you are not already logged in:
   - If you are using the general application URL, for example, *https://ccsp1.pj16.loc/Prp/*, the **Welcome to CCaaS** page will appear. Type your **Username** in User Principal Name (UPN) format, for example, *someone@domainname.com*, and click **Continue.**
   - If you are using the tenant's direct login URL, for example, *https://ccsp1.pj16.loc/portal/t1/Prp/*, you do not see this page. Instead, go straight to step 3.

3. The next step depends on the identity provider configured by your administrator:
   - For Auth Server, if it is not already present, type your **Username** in User Principal Name (UPN) format, for example, *someone@domainname.com*. Type your **Password** and click **Log in**. The main **Provisioning Portal** page appears. If necessary, see Password expired message below.

     Alternatively:

     - If you are using the general application URL and your system is set up with an identity provider, click **Login with your identity provider**.
     - To change the username, click **Change user** to go to the **Welcome to CCaaS** page.
   - For ADFS, you are redirected to the ADFS login page to authenticate. Please consult your local procedures for how to proceed from this point.

- For Enghouse Identity Server (EIS), you are redirected to the EIS login page. Type your **Password** and click **Log in**. The main **Provisioning Portal** page appears.

4. If necessary, see Additional login messages below.

Next, see Tenant view.

Password expired message

For Auth Server, if your password has expired or your administrator has set your account to require a password change at the next login, the next time you enter your password on the **Welcome to CCaaS** page, the **Password expired** notification appears.

1. In the notification, click **Change password**. The **Change password** dialog appears.
2. In **Old password**, type your current password.
3. In **New password**, type your new password. Do not use the double quote (") character or spaces.
4. In **Confirm password**, type your new password again.
5. Click **OK**.

Additional login messages

The following messages may appear when you try to log in:

- *Failed to get authorization for use*. Your user profile is not permitted to use the Provisioning Portal application. Only tenant administrators are permitted to use the Provisioning Portal application.
- *You are not authorized to view this page.* This can occur because:
  - You are logged in to an external identity provider with a different username than the one you entered on the **Welcome to CCaaS** page to log in to the CCaaS client application.
  - You entered a username on the **Welcome to CCaaS** page and were redirected to an external identity provider, where you log on with a different username.
- *Auth Server is not available or there is a misconfiguration*. You must contact your administrator. You will not be able to log in to Provisioning Portal until the issue is resolved.

Log in using Unified Admin

See also Log in.

Unified Admin is a portal application for tenant administrators that presents the administration applications you are allowed to access.

> **Note**
> If you are allowed to access only one administration application, you go straight into that application without seeing the **App Selector** page.

1. If you are not already logged in:

   - If you are using the general application URL, for example, *https://ccsp1.pj16.loc/AuthServer/Pages/AppSelector.aspx*, the **Welcome to CCaaS** page will appear. Type your **Username** in User Principal Name (UPN) format, for example, *someone@domainname.com*, and click **Continue.**
   - If you are using the tenant's direct login URL, for example, *https://ccsp1.pj16.loc/portal/t1/apps*, you do not see this page. Instead, go straight to step 2.

2. The next step depends on the identity provider configured by your administrator:

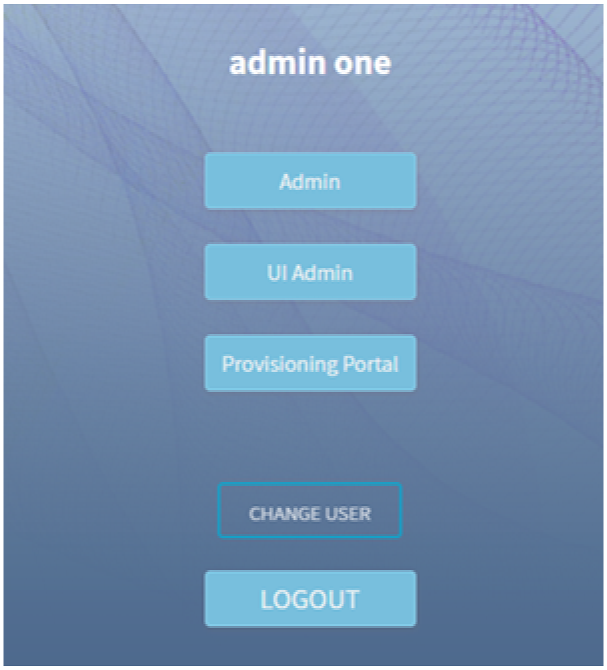
   - For Auth Server, if it is not already present, type your **Username** in User Principal Name (UPN) format, for example, *someone@domainname.com*. Type your **Password** and click **Log in**. The **App Selector** page displays buttons for the administration applications you are allowed to access.

     If necessary, see Password expired message or Additional login messages.

     Alternatively:

     - If you are using the general application URL and your system is set up with an identity provider, click **Login with your identity provider**.
     - To change the username, click **Change user** to go to the **Welcome to CCaaS** page.

   - For ADFS, you are redirected to the ADFS login page to authenticate. Please consult your local procedures for how to proceed from this point.
   - For Enghouse Identity Server (EIS), you are redirected to the EIS login page. Type your **Password** and click **Log in**. The **App Selector** page displays buttons for the administration applications you are allowed to access.

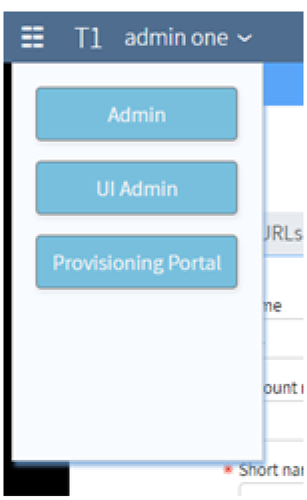


3. Click the **Provisioning Portal** button. The main **Provisioning Portal** page appears.

Next, see Tenant view.

App selector menu

To open the other administration applications you are allowed to access, click  **App selector** at the top left of the main **Provisioning Portal** page, and then click the appropriate button.



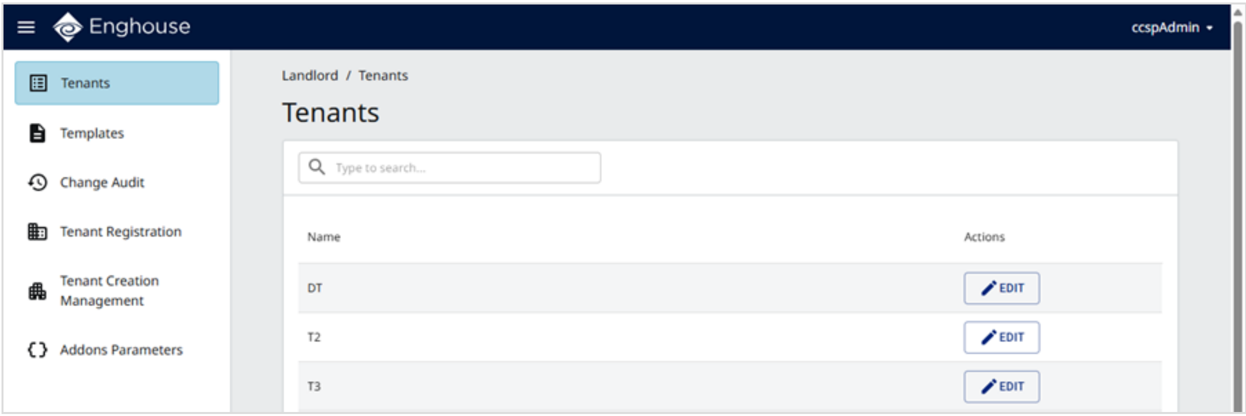
Each application opens in its own browser window. You can open several Provisioning Portal tabs in the same browser.

Landlord view

Your view of the Provisioning Portal depends on whether you log on as a landlord or a tenant administrator.

Tenants page

After logging in, landlord administrators see the **Tenants** page.



Depending on the configuration of your system, the **Tenant Registration** and **Tenant Creation Management** pages may not appear.

Select the tenant to manage

On the **Tenants** page, in the tenant's row, click 

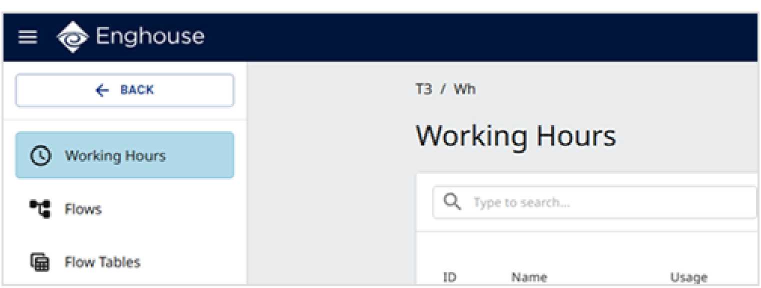
.

Next see Tenant view.

Return to the Tenants page

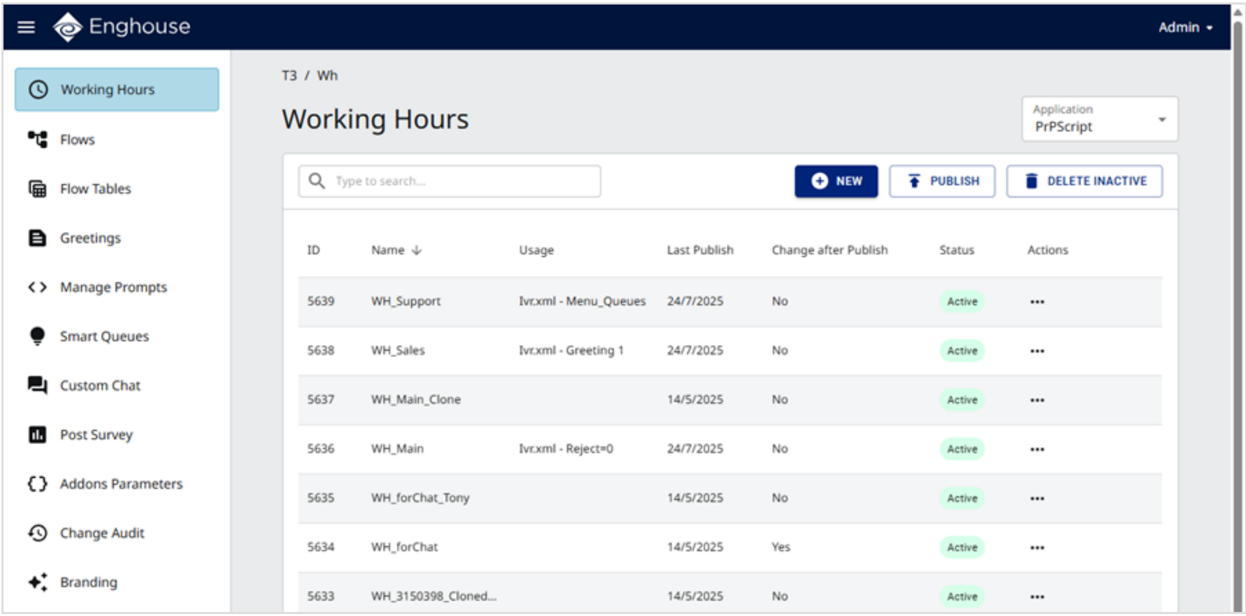
To return to the **Tenants** page, click 

.



Tenant view

If you log on to Provisioning Portal as a tenant administrator, you see the **Working Hours** page.



Submit a tenant subscription request

The Provisioning Portal enables service providers to perform routine tenant on-boarding and core tenant administration tasks with their own operational staff or to use the Provisioning Portal as a self-service tool with existing tenants or customers via external web access to the portal.

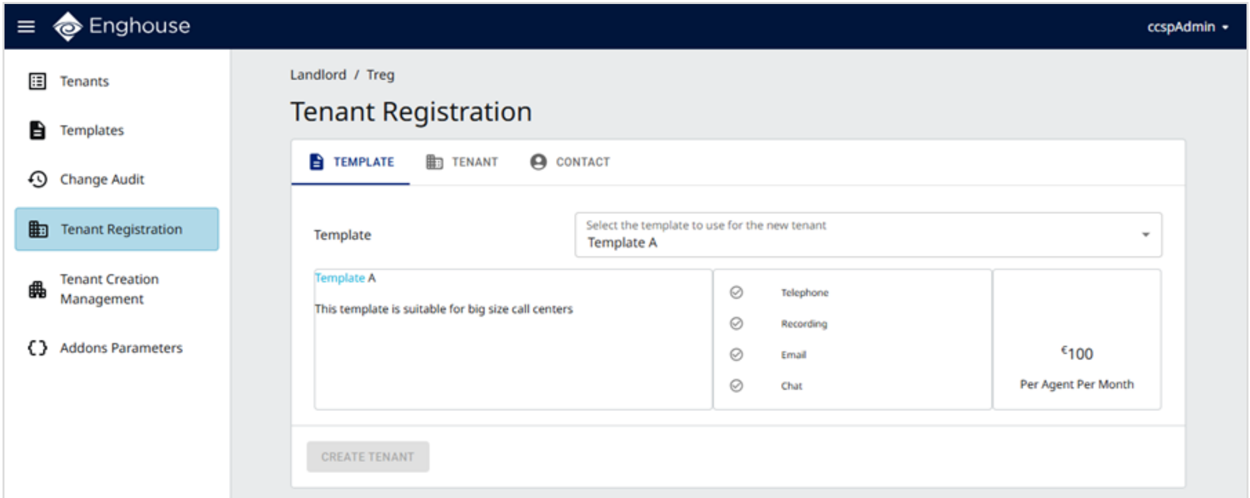
The portal can also be used as a self-service tenant registration tool that allows the service provider's prospects to register as a new tenant and select service options via template service packages.

> **Note (for the service providers)**
>
> - Before accepting tenant subscription requests from customers, you must prepare source tenants as described in the *Provisioning Portal Deployment Guide*.
> - From 15.4, multiple Providers are supported along with WebTop payment integration.

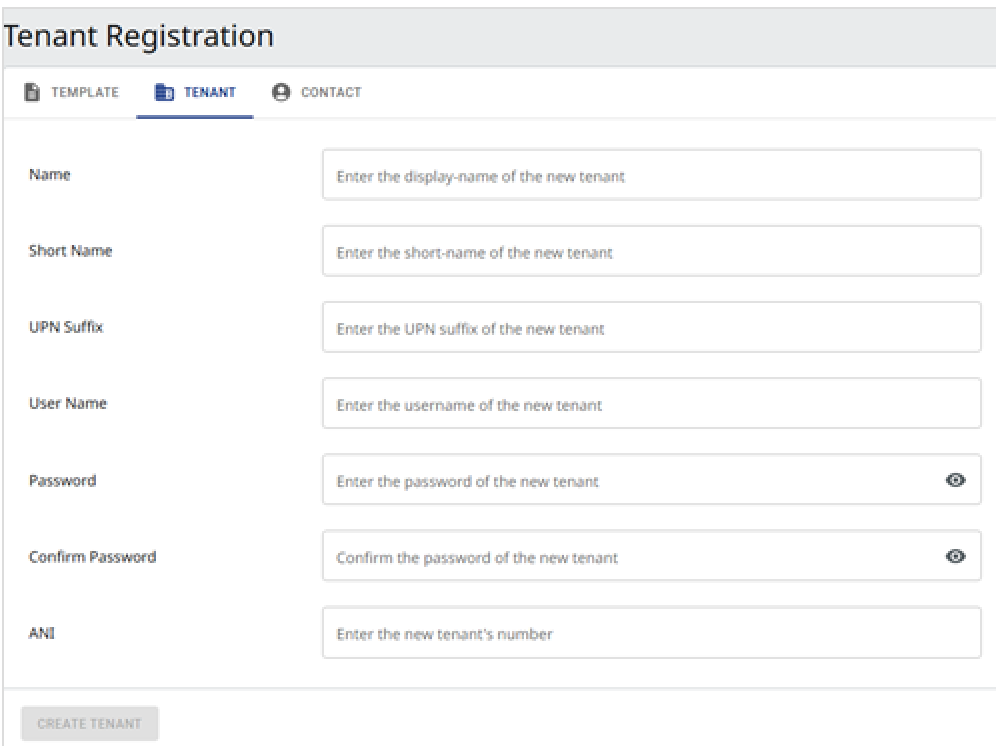
> **Caution (for the service providers)**
>
> - The current Provisioning Portal does not support cloning CCaaS UI Admin configurations from source tenants. While the newly provisioned tenants still inherit the landlord level Resources for the canned phrases and the landlord level Gadgetry via the Default Settings, configurations made at the source tenant level are not cloned to the new tenants. Customize using the system-wide Resources and the system-wide Default Settings whenever possible. When Resources and Gadgetry customizations must be made at the source tenant level, such customizations must be recreated manually for the newly provisioned tenants.
> - The first available DNIS number or DNIS numbers block will be automatically assigned to the new tenant . Make sure that the platform has sufficient available DNIS numbers. A DNIS is considered available when it isn't assigned to any specific tenant other than the DefaultTenant (tenant ID=0). DNIS numbers assigned to the DefaultTenant are considered available. Newly provisioned DNIS numbers are automatically assigned to the DefaultTenant.

To submit a tenant subscription request:

1. After logging in to the Provisioning Portal, open the **Tenant Registration** page.



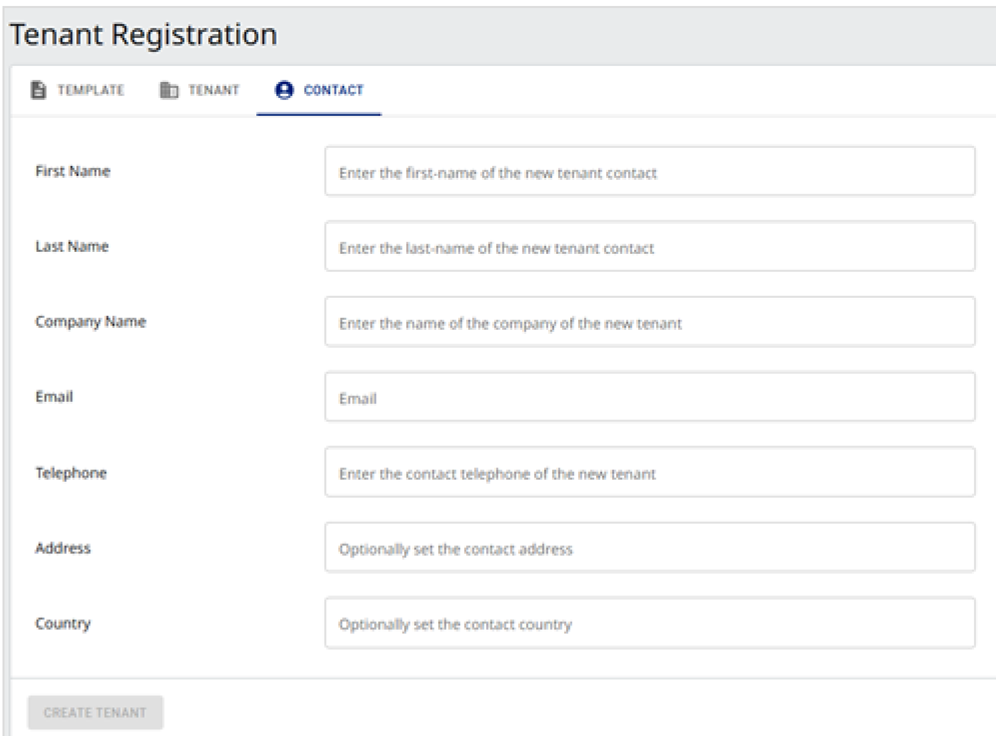
2. On the **Template** tab, select the template to use for the new tenant.
3. Click the **Tenant** tab.



4. Enter the following required information:
   - **Name** — the tenant name you want to use, for example, KentonElectronics. The name must not contain spaces, underscores, or special characters.

- **Short Name** — the shortened tenant name you want to use, for example, ke. The name must not contain spaces, underscores, or special characters.
- **UPN Suffix** — the email and logon suffix for all users in the tenant's contact center, for example, kenton-electronics.com.
- **User Name** — the tenant administrator name you want to use, for example, keAdmin. The system prefixes ‘prp’ as the final personnel ID for the Provisioning Portal.
- **Password** — the tenant administrator password you want to use.
- **Confirm Password** — retype the password to confirm it.
- **ANI** — the ANI to present to the telephone network for placing outgoing calls. This is usually the main telephone number of your company.

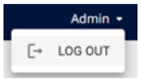
5. Click the **Contact** tab and enter the contact details for the new tenant.



6. Click **Create Tenant**. After submitting your request, you can check its status through **Tenant Creation Management**.
7. At this stage, the system has accepted the subscription request and depending on your service provider's decision, the tenant provisioning process may start immediately or may be scheduled to start during off-peak hours.
8. When the tenant provisioning process is complete, an email notification will be sent to the email address you specified in the subscription request. The notification will tell you how to access your tenant if the subscription request completed successfully or what to do next if the subscription request failed.
9. When the tenant is cloned successfully, configure the Callback Folder email address. For details, see Edit and publish general parameters for Smart Queues.

Log out

1. At the top right of the Provisioning Portal, click the arrow next to your user name and then click **Log out**.



2. In the **Logout** dialog, click **OK**.
3. Do one of the following:
    - If you logged in directly, the **Logout** page appears:
        - If you want to return to Provisioning Portal, click **Log back in**.
        - If you have finished working with CCaaS, click **Log out of your CCaaS session**. The **Confirm logout** dialog appears. Click **Yes**. The following message appears: *You are now logged out of your session*.
    - If you logged in using Unified Admin, the **App Selector** page appears:
        - If you want to return to Provisioning Portal or use another administration application that you are allowed to access, click the appropriate button.
        - If you want to change the username, click **Change user** to go to the **Welcome to CCaaS** page.
        - If you have finished working with CCaaS, click **Logout**. The **Confirm end session** dialog appears. Click **Yes**. The following message appears: *You are now logged out of your session*.

Additional logout messages

When you click **Log out of your CCaaS session**, the following message may appear:

- *Logout was not completed successfully due to the Authentication Server being unavailable. Please contact your system administrator.*

1. Tell your system administrator about the issue and wait for it to be resolved.
2. When it is resolved, click **OK** to close the message dialog.
3. Click **Log out of your CCaaS** session again.

The application will return to the **Welcome to CCaaS** page. Depending on the problem resolution, this may take slightly longer than normal.

Session expiry

Your CCaaS application session will become invalid when:

- The login session time exceeds the maximum CCaaS login session lifetime specified by your administrator.
- You log out of your CCaaS session using another application.
- You clear all cookies in the browser.

When your CCaaS application session becomes invalid, you must log in again. See Log in.

If you are logged in with an external identity provider (ADFS or EIS) and that provider’s login session lifetime exceeds the CCaaS login session lifetime:

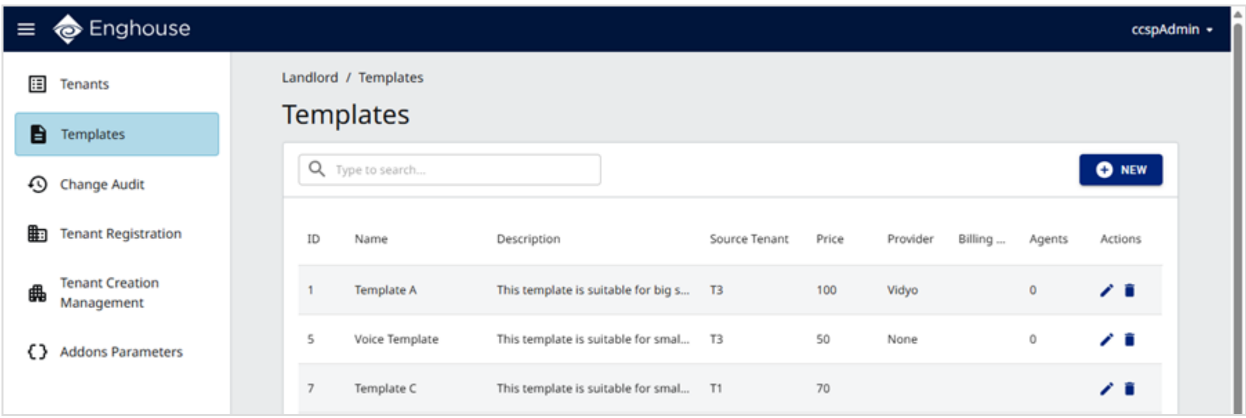
- If you log in again using the general application URL, for example, *https://ccsp1.pj16.loc/Prp/*, you need to enter only your username on the **Welcome to CCaaS** page, and are then automatically authenticated against your external identity provider.
- If you log in again using the tenant's direct login URL, for example, *https://ccsp1.pj16.loc/portal/t1/Prp/*, you are automatically authenticated against your external identity provider and do not need to enter your username.

3: Templates (landlord only)

This chapter contains the following information:

- Add a template
- Edit a template
- Delete a template

The **Templates** page appears as follows.



Overview

The self-service Provisioning Portal enabled for a new subscriber, presents a list of service package options that are provisioned in advance by the service provider. The service provider refers to these as templates.

These templates are labelled as service package options, for example, as Starter, Mid, Advanced and Pro. Each one has a set of selected services and features such as Telephone, Email, Chat, Callback, and Recording.

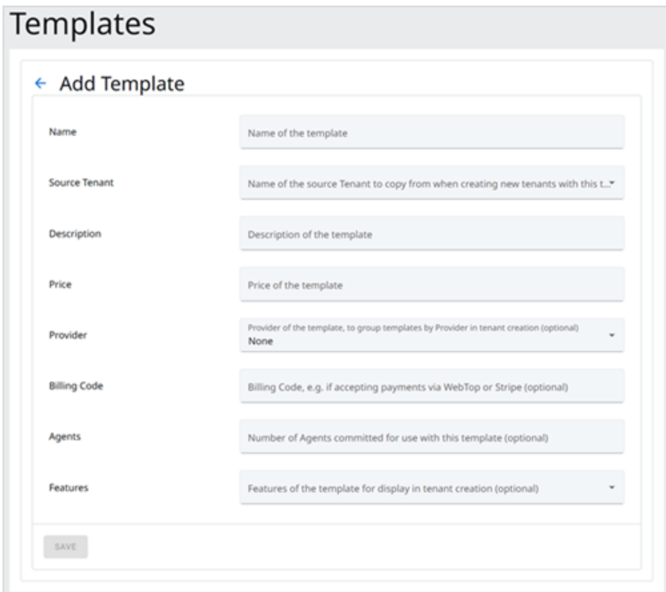
After the new subscriber selects the service package option, the fully automated tenant provisioning process creates the tenant based on the selected source tenant template. It then enables services and features according to the source template of the selected service package option.

Add a template

> **Note**
> If you attempt to reuse a template name, the *Adding Template Failed* message appears.

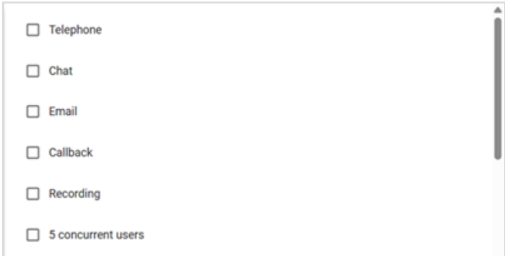
1. On the **Templates** page, click 

. The **Add Template** dialog appears.



2. Enter the following information:

   - **Name** — enter a unique name for the new template. This name appears on the self-service Provisioning Portal.
   - **Source Tenant** — select a tenant in the list.
   - **Description** and **Price** — enter the information to display on the self-service Provisioning Portal.
   - **Provider** (optional) — select the Provider to allocate the new template to.
   - **Billing Code** (optional) — enter the code to use.
   - **Agents** (optional) — enter the number of agents committed for use with this template.
   - **Features** (optional) — select the features to enable for the template.



3. Click **Save**. The new template appears on the **Templates** page.

Edit a template

1. On the **Templates** page, in the template's row, click **Edit Template.** The **Edit Template [Name]** dialog appears.
2. Edit the template as required. For details, see Add a template.
3. Click **Save**.

Delete a template

> **Note**
> Deleted templates remain in the Provisioning Portal database and can be restored by ASG engineers.

1. On the **Templates** page, in the template's row, click **Delete Template**.
2. In the **Delete Template** dialog, click **Delete**.

4: Script template

This chapter contains the following information:

- Flow placeholders
- Working hours placeholders
- Audio files
- Script files

This section describes the customization points, audio files, events, and logic of the respective event script files from which the script template is constructed.

Flow placeholders

The default flow placeholders are as follows.

Name	ID	Type	Script name	Description
Flow_CallBack	PHFA	Flow	Flows.XML	A flow to prompt callers for a callback.
Flow_Difficulties	PHFB	Flow	Flows.XML	A flow to announce difficulties with routing the calls.
Flow_ TransferToExternal	PHFC	Flow	Flows.XML	A flow to transfer callers to external numbers.
Flow_VM	PHFD	Flow	Flows.XML	A flow to prompt callers to leave a voice message.
Flow_Closed	PHF1	Flow	IVR.XML	A voice call follows this placeholder when the call is offered to *IVR.XML* during non-office hours or special dates according to the events assigned to the Weekdays and Special Events calendars in the placeholder. A voice call may also join this placeholder if the Support or Sales service is offline.
Greeting	PHF2	Announcement	IVR.XML	When the offered call is within the working hours of the contact center, the call follows this placeholder to play a greeting

Name	ID	Type	Script name	Description
				message to the caller.
Menu_Lang	PHF3	Menu	IVR.XML	This placeholder follows the Greeting placeholder to prompt the caller for the language option.
Menu_Queues	PHF4	Menu	IVR.XML	This placeholder follows the Menu_Lang placeholder to prompt the caller to choose the Support and Sales service.
Flow_Support	PHF5	Flow	IVR.XML	This placeholder follows the Menu_Queues placeholder to set up the queue and skill values for call routing when the offered call is within the working hours of the selected service. Otherwise, the call joins the Flow_Closed placeholder.
Flow_Sales	PHF6	Flow	IVR.XML	
Flow1	PHF7	Flow	IVR.XML	This placeholder is not associated with any events and does not yet have any actions defined. It is designed for you to customize actions without changing the other placeholders that came with your tenant. Use this placeholder to define actions for the flow, and then associate the flow with its respective events and menus.
Flow2	PHF8	Flow	IVR.XML	
Flow3	PHF9	Flow	IVR.XML	

> **Note**
> The flow diagrams that follow reference the above IDs.

Working hours placeholders

The default working hours placeholders are as follows.

Name	ID	Description
WH_Main	PHW1	Before the system plays the greeting message, this placeholder checks if the call is offered during non-office hours or special dates according to the events assigned to the Weekdays and Special Events calendars in the placeholder.
WH_Support	PHW2	Before the system puts the call in the Support queue, this placeholder checks if the call is offered during non-office hours or special dates according to the events assigned to the Weekdays and Special Events calendars in the placeholder.
WH_Sales	PHW3	Before the system puts the call in the Support queue, this placeholder checks if the call is offered during non-office hours or special dates according to the events assigned to the Weekdays and Special Events calendars in the placeholder.

> **Note**
>
> The flow diagrams that follow reference the above IDs.

Audio files

The following audio files are used in the script template.

Audio file	ID	En (English)	Sp (Spanish)
Closed	P1	We are now closed. We will be happy to help during opening hours. Thanks you	Ahora estamos fuera de horario. Estaremos encantados de ayudarle durante el horario de apertura. gracias
Greeting	P2	Welcome to PRP IVR demo	Bienvenido a PRP IVR demostración
MenuLang	P3	For English please press 1. For Spanish please press 2.	Para Inglés por favor, pulse 1. Para español por favor, pulse 2.
Incorrect	P4	Your entry is not correct. Please try again	Su entrada no es correcta. Por favor, inténtalo de nuevo
Empty	P5	You did not choose anything. Please try again	Usted no ha elegido ninguna opción. Por favor, inténtalo de nuevo
MenuQueues	P6	For technical support please press 1. For financial questions please press 2.	Para obtener asistencia técnica, por favor pulse 1. Para cuestiones financieras , por favor pulse 2.
NbrCalls1	P7	there are currently	Hay actualmente
NbrCalls2	P8	calls ahead	pide por delante
AWT	P9	currently the average waiting time is	Actualmente el tiempo medio de espera es
MusicOnHold	P10	(music)	(music)
ForceMenuTrans	P11	To transfer to an emergency line press 1 To continue waiting to a representative press 2	Para transferir a una línea de emergencia, pulse 1. Para continuar a la espera de un agente, pulse 2.
ForceMenuVM	P12	To leave a message press 1. To continue waiting to a representative press 2	Para dejar un mensaje, pulse 1. Para continuar a la espera de un agente 2
Leave	P13	Leave a message after the beep and press pound for finish.	Deja un mensaje después de la señal y pulse almohadilla para Terminar.
MenuVM	P14	To end the call press 1.	Para finalizar la llamada,

Audio file	ID	En (English)	Sp (Spanish)
		To leave another message press 2.	pulse 1. Para dejar otro mensaje pulse 2.
Goodbye	P15	Goodbye	Adiós
ForceMenuCB	P16	If you want to end the call and we will get back to you when your turn arrives press 1. To continue waiting to a representative press 2	Si desea finalizar la llamada y que nos pongamos en contacto con usted lo antes posible pulse 1. Para continuar a la espera de un agente 2
MenuCB1	P17	We will call you back to the number which you dialed. For enter new number press 1 else wait...	Le llamaremos al número que usted ha marcado. Para introducir un nuevo número pulse 1. En caso contrario, espere.
EnterPhone	P18	Enter the phone number which we will call too and press pound for finish.	Introduzca el número de teléfono al que llamaremos y pulse almohadilla para terminar.
PhoneNumber	P19	The number you have entered is:	El número que ha introducido es:
MenuCB2	P20	To approve press 1. To enter another phone number press 2.	Para confirmar, pulse 1 para introducir otro número de teléfono, pulse 2
CBApprove	P21	We will call you when your turn arrives.	Nosotros le llamaremos lo antes posible
MemuClosed	P22	We're now closed. If you want to leave a message please press 1, if you want to transfer to an emergency line please press 2	(The same message in Spanish)
VM	P23	Your message has been recorded successfully	(The same message in Spanish)

Note

References to the above IDs are found in the flow diagrams that follow.

Script files

IVR.XML

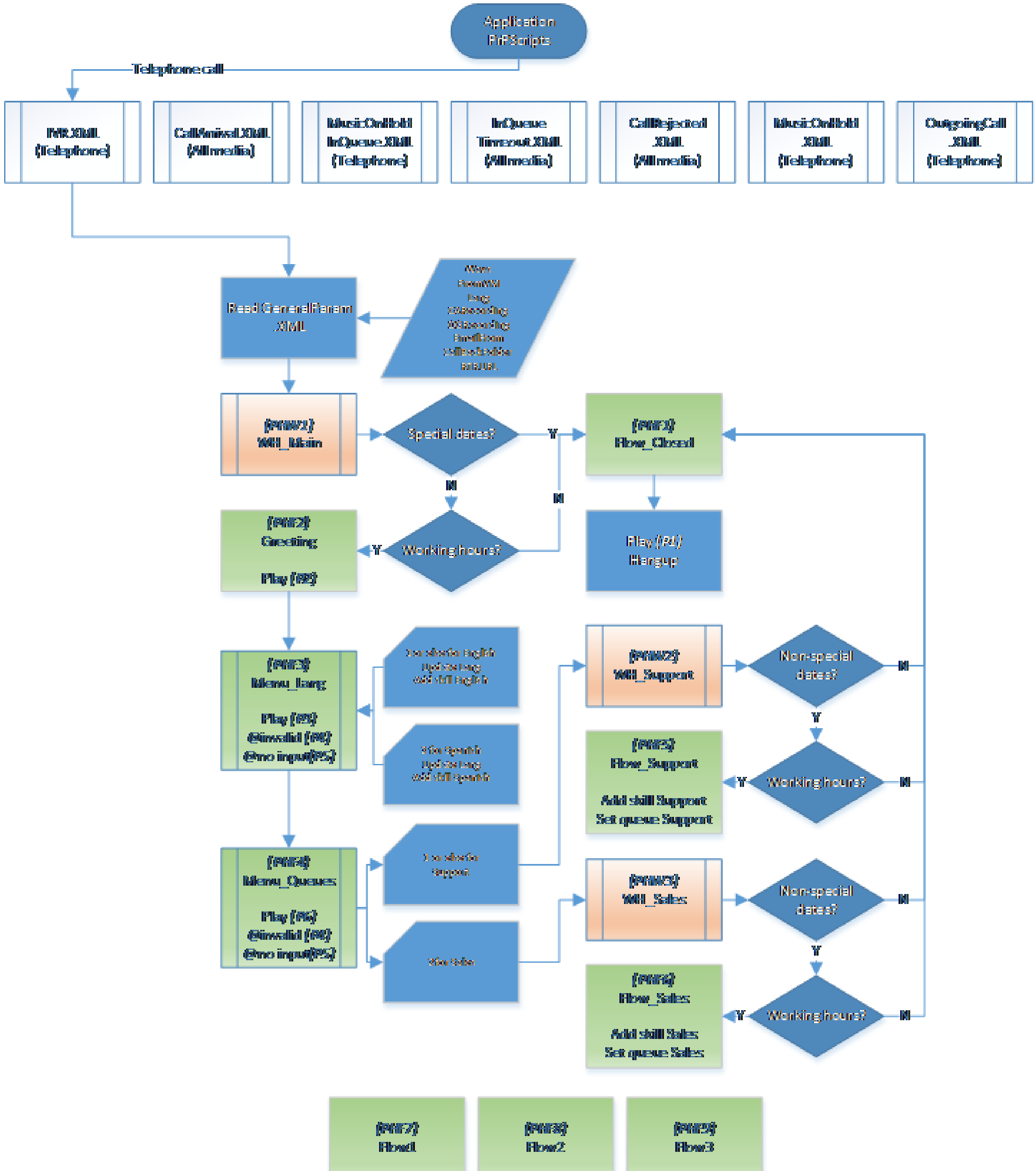
IVR.XML is the default event script file for IVR event.

IVR event is the first event the system triggers for telephone callers. The IVR.XML in the script template first determines if current date and time fall within non-office hours events associated with special dates and weekdays in the WH_Main working hours placeholder under Working Hours module.

If that is true, for example, holiday or non-working hours event, the system treats the call with Flow_Closed flow placeholder defined in Flows module, the system plays the Closed prompt by the default language code the service provider defined, and then disconnects the call.

Otherwise, the system treats the call with Greeting Announcement placeholder that plays greeting.wav by the default language code. The system then prompts for language selection between English and Spanish, and then prompts for service selection between Support and Sales.

The associated working hours placeholder, WH_Support or WH_Sales, would check further if the associated service is within operating hours. If that is true, the system treats the call with Flow_Closed like before. Otherwise, the system would request to place the call into the relevant queue.



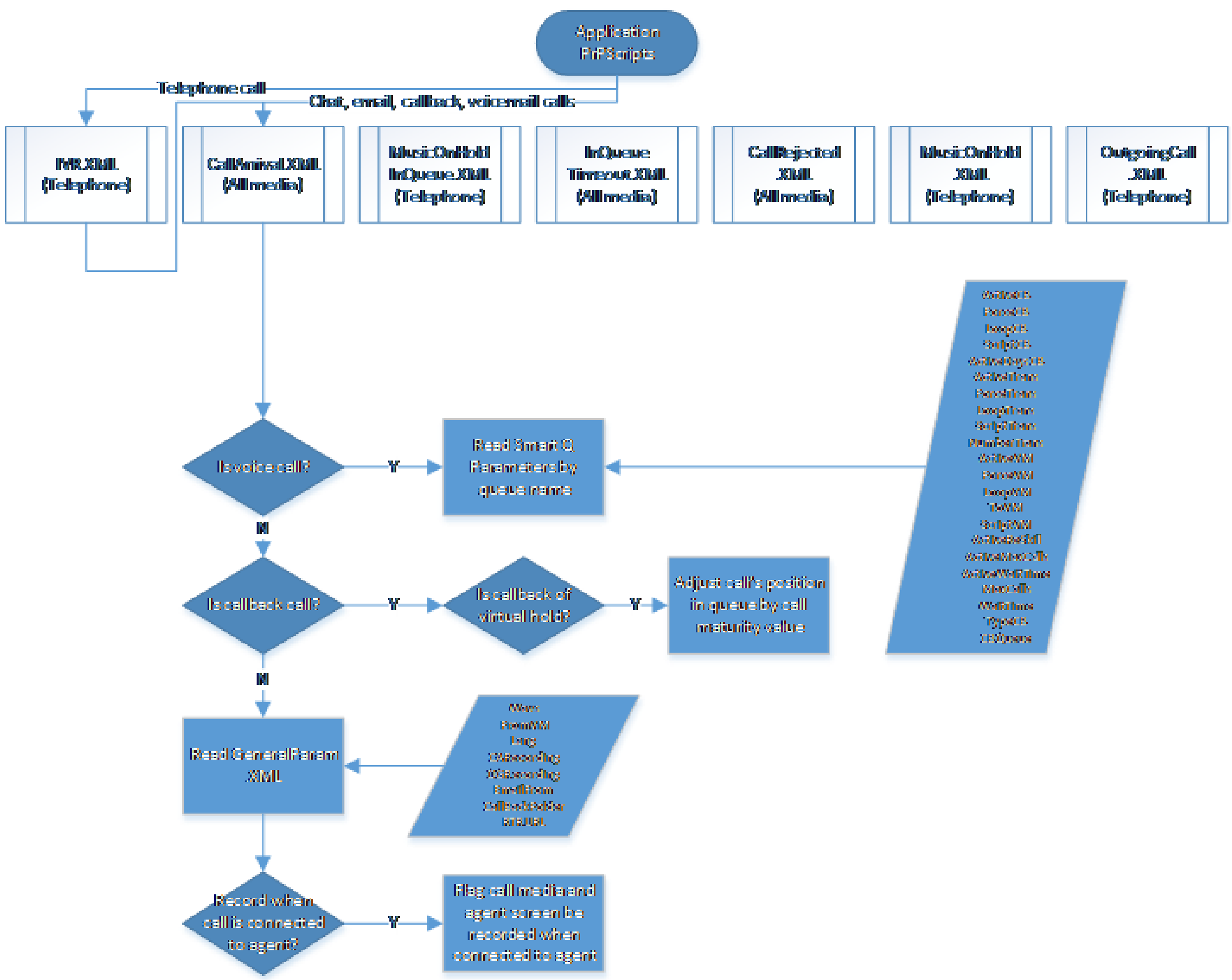
Application
PrPScripts
Telephone call
IVR XML
(Telephone)
CallArrival XML
(All media)
MusicOnHold
InQueue XML
(Telephone)
InQueue
Timeout XML
(All media)
CallRejected
XML
(All media)
MusicOnHold
XML
(Telephone)
OutgoingCall
XML
(Telephone)
Read GeneralParam
XML
(PNW1)
WH_Main
Special dates?
Y
N
(PNF1)
Flow_Closed
Play (P1)
Hangup
(PNF2)
Greeting
Play (P2)
Working hours?
(PNF3)
Menu_Lang
Play (P3)
@invalid (P4)
@no input(P5)
(PNW2)
WH_Support
Non-special
dates?
(PNF5)
Flow_Support
Add skill Support
Set queue Support
Working hours?
(PNF4)
Menu_Queues
Play (P6)
@invalid (P4)
@no input(P5)
(PNW3)
WH_Sales
Non-special
dates?
(PNF6)
Flow_Sales
Add skill Sales
Set queue Sales
Working hours?
(PNF7)
Flow1
(PNF8)
Flow2
(PNF9)
Flow3

CallArrival.XML

CallArrival.XML is the default event script file for CallArrival event. CallArrival event is the first event for chat, email, callback and voicemail calls. CallArrival event is the next event for active telephone callers after relevant script(s) for IVR event ended.

This script checks if the media type is telephone call. If this is true, it reads relevant Smart Queues parameters by queue name, and when the script ends, the system submits a request to the ACD to queue the call. If this is false, the system checks if the call is a callback call. If this is true, it further checks if the callback is of virtual hold. If this is true, the system adjusts the position in queue for the virtual hold callback call, and then the system submits a request to the ACD to queue the call.

If the call is not telephone call and not callback call (i.e. chat, email, voicemail call), the system reads Smart Queues general parameters and sets recording flags accordingly. The system submits a request to the ACD to queue the call.

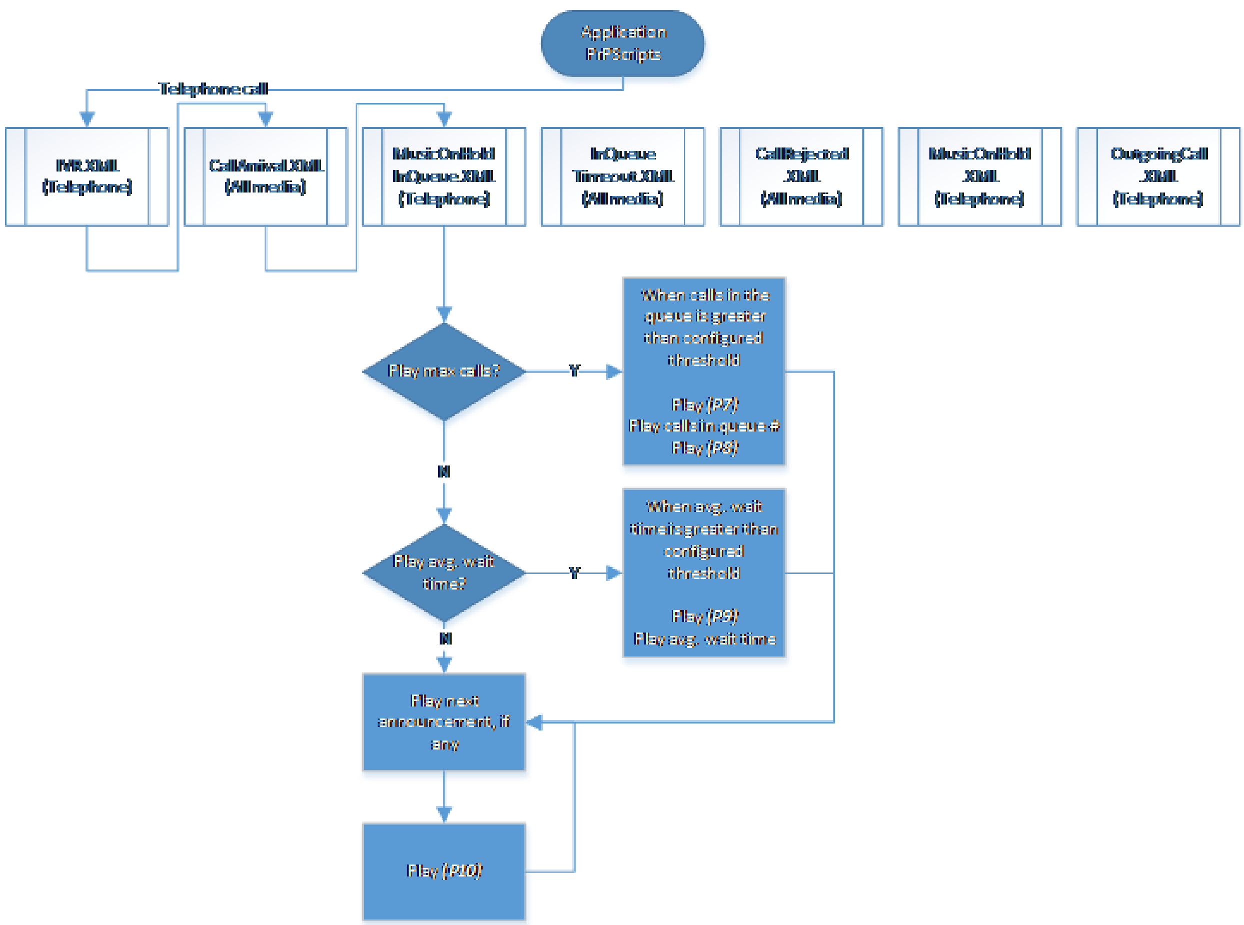


MusicOnHoldInQueue.XML

MusicOnHoldInQueue.XML is the default script file for Music On Hold In Queue event. Music On Hold In Queue event is triggered when telephone call had been accepted by the ACD for queueing.

This event is applicable to telephone calls only.

It first checks play max call Smart Queues parameter is set. If this is true, it plays the number of call that are currently in the queue when the number is greater than the configured threshold. If this is false, it further checks play average wait time Smart Queues parameter is set. If this is true, it plays the queue's average wait time when the average wait time is greater than the configured threshold. The roots of the two conditional checks join a play music loop. The play music loop plays configured announcement prompt(s) if any, and plays MusicOnHold prompt.



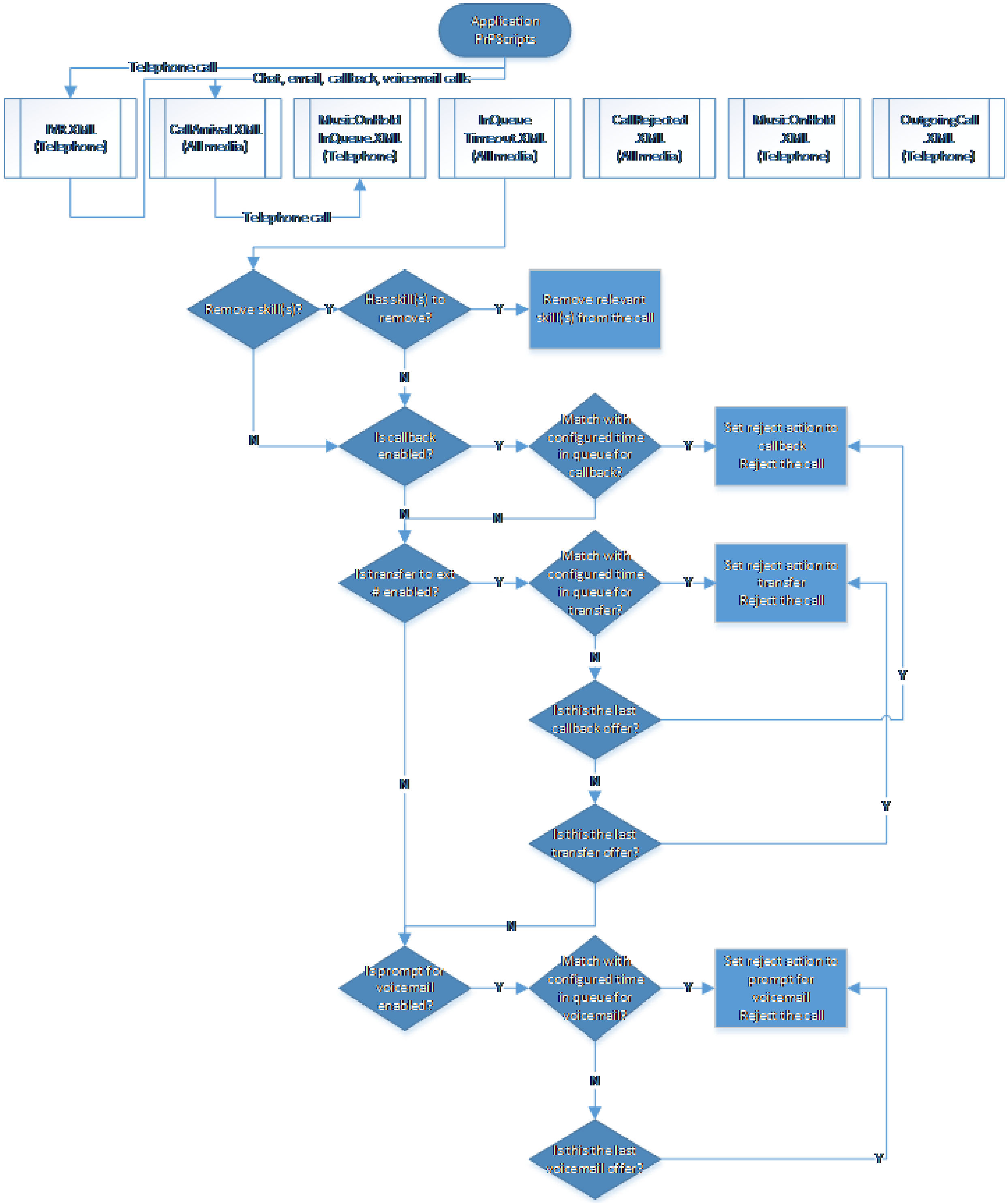
InQueueTimeout.XML

InQueueTimeout.XML is the default script file for InQueueTimeout event. In Queue Timeout is triggered when a call remains unanswered per each allowed timeout period.

This event is for all media calls and it runs scripts independent of MusicOnHoldInQueue script.

It first checks if Remove Skill Smart Queues parameter is set. If this is true, it removes skill(s) specified in Remove Skill from the call so that more agents are capable of answering the call. If this is false, or when there were no skills to remove, it then checks if Callback Smart Queues parameter is set. If this is true and when the call's in queue time matches value configured for Callback, (A) it sets reject action to CB and then reject the call, subsequent checks for callback, such as Force Callback or send callback as Virtual Hold, will be done in the Call Rejected event. If Callback Smart Queues parameter is not set, or when it is not the time to offer the callback option yet, it then checks if Transfer Smart Queues parameter is set. If this is true and when the call's in queue time matches value configured for Transfer, (B) it sets reject action to transfer and then reject the call, subsequent checks for transfer, such as Force Transfer, will be done in Call Rejected event. If it is not the time to offer transfer option yet, it then check if it is the last opportunity to offer Callback option. If this is true, it joins (A) above.

Otherwise, it checks if it is the last opportunity to offer Transfer option. If this is true, it joins (B) above. If this is false, or when Transfer Smart Queues parameter is not set, if then checks Send to VM Smart Queues parameter is set. If this is true and when the call's in queue time matches value configured for Send to VM, (C) it sets reject action to VM and then reject the call, subsequent checks for Send to VM, such as Force Voicemail, will be done in Call Rejected event. If it is not the time to offer the Send to VM option yet, it then checks if it is the last opportunity to offer Send To VM option. If this this true, it joins (C) above. If there were no reject actions been set, the call stays in queue as usual.



Application
PrPScripts
Telephone call
Chat, email, callback, voicemail calls
IVR XML
(Telephone)
CallArrival XML
(All media)
MusicOnHold
InQueue XML
(Telephone)
InQueue
Timeout XML
(All media)
CallRejected
XML
(All media)
MusicOnHold
XML
(Telephone)
OutgoingCall
XML
(Telephone)
Telephone call
Remove skill(s)?
Has skill(s) to remove?
Remove relevant skill(s) from the call
Is callback enabled?
Match with configured time in queue for callback?
Set reject action to callback
Reject the call
Is transfer to ext # enabled?
Match with configured time in queue for transfer?
Set reject action to transfer
Reject the call
Is this the last callback offer?
Is this the last transfer offer?
Is prompt for voicemail enabled?
Match with configured time in queue for voicemail?
Set reject action to prompt for voicemail
Reject the call
Is this the last voicemail offer?

CallRejected.XML

CallRejected.XML is the default script file for Call Rejected event. Call Rejected event is triggered when there were no qualifying agents to answer the call, or when the call was rejected during In Queue Timeout event.

It first checks if the call was rejected during In Queue Timeout event. If this is true, it continues handling the call with the respective script file, namely Transfer.XML, VM.XML or CB.XML for reject action Transfer, VM or CB respectively.

If the call was rejected due to no qualifying agents, the system re-route the calls according to the designated queue or flow.

Transfer.XML

This script checks if Force Transfer is set for Transfer Smart Queues parameter. If this is true, (A) the system initiates the transfer and if the call was answered it bridges the caller to the transferred number, otherwise, (B) it keeps the call in the queue.

If Force Transfer is not set, it then prompts for the Transfer option. If the caller selects Transfer, it joins (A) above to transfer the call. If the caller selects not to Transfer, it joins (B) above.

VM.XML

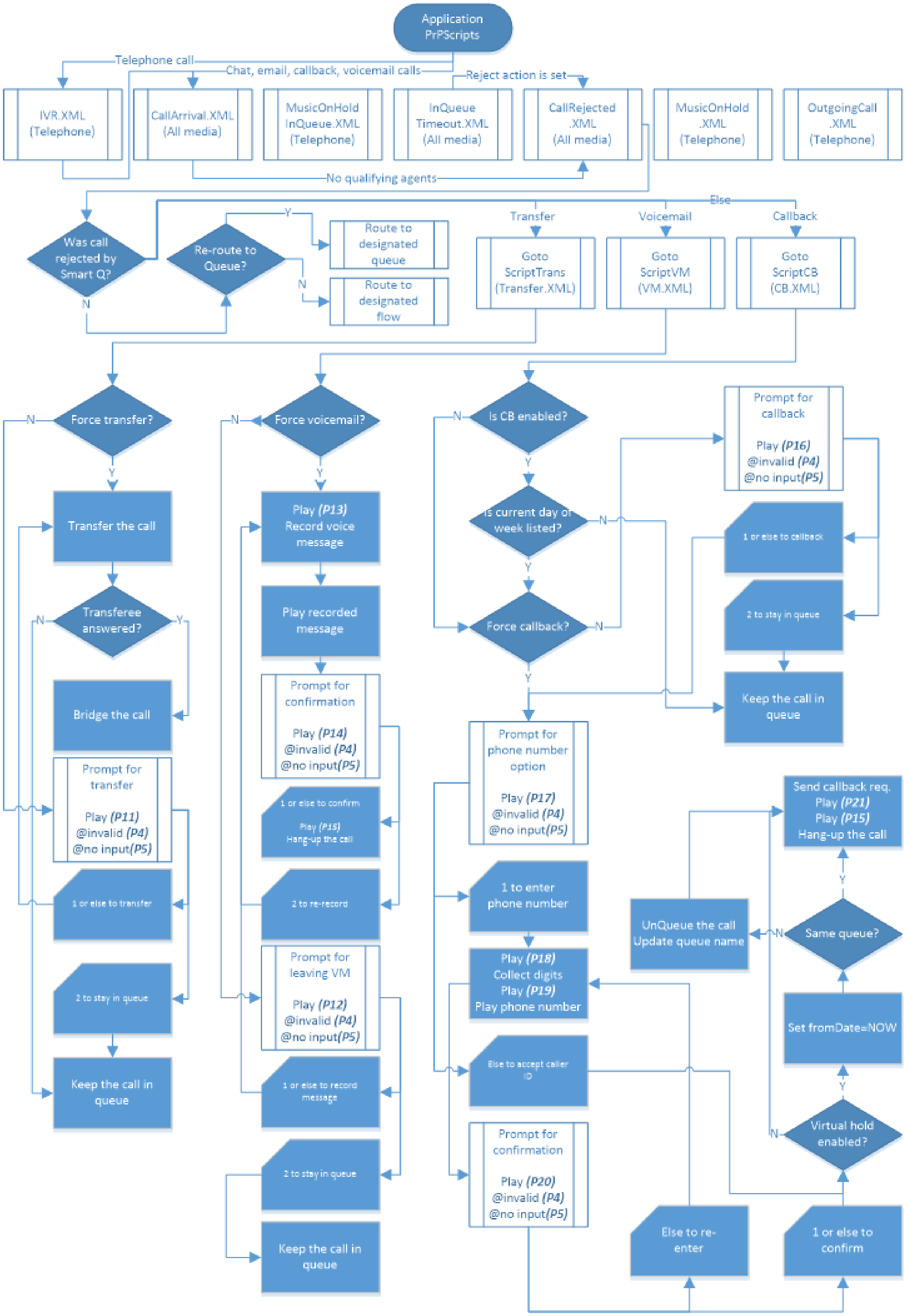
This script checks if Force Voicemail is set for Send to VM Smart Queues parameter. If this is true, (A) it prompts the caller to record a message, play the recorded message back, and then prompts for the caller confirmation to send the recorded message. It sends the recorded message when the caller confirms otherwise it joins (A) above.

If Force Voicemail is not set, it prompts for Send to VM option. If the caller selects Send to VM, it join (A) above. If the caller select not to Send to VM, it keeps the call in queue.

CB.XML

This script checks if the feature is enabled for Callback Smart Queues parameter. If this is true, it further checks the current day of week is listed in the Days of Week setting. If this is true and when Force Callback is set, (A) it prompts the caller for accepting caller ID as the callback number or entering a callback number. When the caller accepts using caller ID as the callback number, (B) it further checks if Virtual Hold is set, if this is true, it sets the callback date and time, update queue name when Callback Queue Name is set, and finally (C) it sends the callback request.

If Virtual Hold is not set, it joins (C) above. If the caller selects entering a callback phone number, and when the caller confirms the number, it joins (B) above. If Force Callback is not set, it prompts for callback option. If the caller selects to callback, it joins (A) above. If the caller selects to wait in queue, (D) it keeps the call in queue. Lastly, if current day of week is not listed in the Days of Week setting, it joins (D) above.

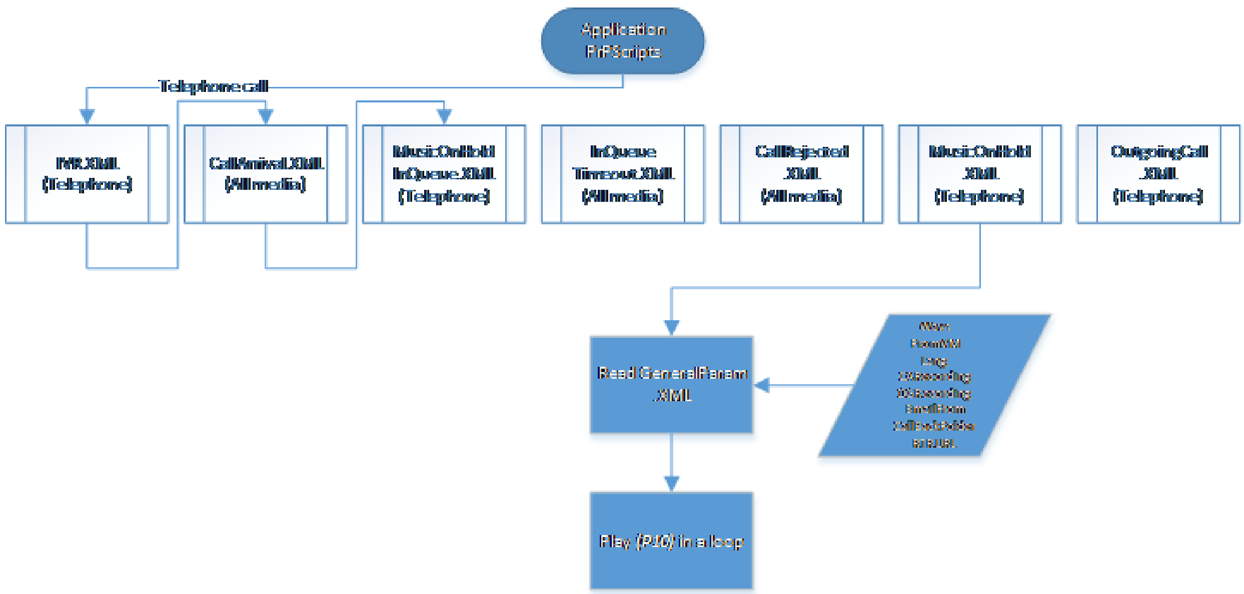

Application PrPScripts
Telephone call
Chat, email, callback, voicemail calls
Reject action is set
IVR.XML (Telephone)
CallArrival.XML (All media)
MusicOnHold InQueue.XML (Telephone)
InQueue Timeout.XML (All media)
CallRejected .XML (All media)
MusicOnHold .XML (Telephone)
OutgoingCall .XML (Telephone)
No qualifying agents
Else
Transfer
Voicemail
Callback
Was call rejected by Smart Q?
Re-route to Queue?
Y
N
Route to designated queue
Route to designated flow
Goto ScriptTrans (Transfer.XML)
Goto ScriptVM (VM.XML)
Goto ScriptCB (CB.XML)
Force transfer?
Transfer the call
Transferee answered?
Bridge the call
Prompt for transfer
Play (P11)
@invalid (P4)
@no input(P5)
1 or else to transfer
2 to stay in queue
Keep the call in queue
Force voicemail?
Play (P13)
Record voice message
Play recorded message
Prompt for confirmation
Play (P14)
@invalid (P4)
@no input(P5)
1 or else to confirm
Play (P15)
Hang-up the call
2 to re-record
Prompt for leaving VM
Play (P12)
@invalid (P4)
@no input(P5)
1 or else to record message
2 to stay in queue
Keep the call in queue
Is CB enabled?
Is current day of week listed?
Force callback?
Prompt for callback
Play (P16)
@invalid (P4)
@no input(P5)
1 or else to callback
2 to stay in queue
Keep the call in queue
Prompt for phone number option
Play (P17)
@invalid (P4)
@no input(P5)
1 to enter phone number
Play (P18)
Collect digits
Play (P19)
Play phone number
Else to accept caller ID
Prompt for confirmation
Play (P20)
@invalid (P4)
@no input(P5)
Send callback req.
Play (P21)
Play (P15)
Hang-up the call
UnQueue the call
Update queue name
Same queue?
Set fromDate=NOW
Virtual hold enabled?
Else to re-enter
1 or else to confirm

MusicOnHold.XML

MusicOnHold.XML is the default script file for Music On Hold event. Music On Hold event is triggered when an agent puts the caller on hold for calls connected to agents.

This event is for telephone calls only.

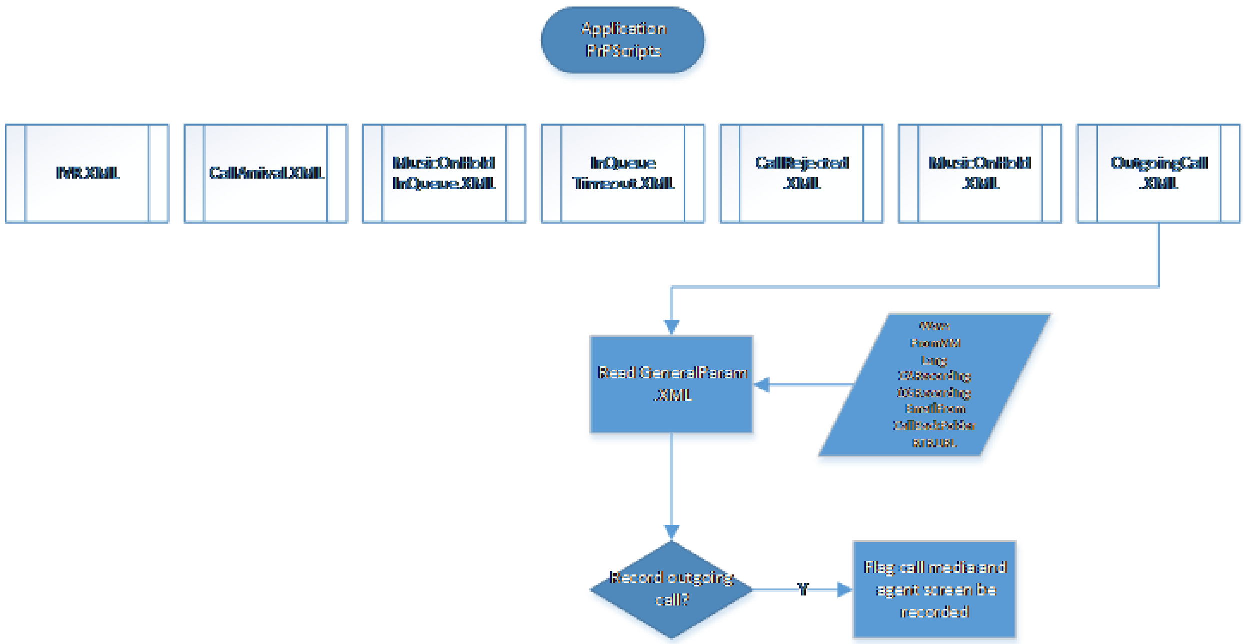
It first reads Smart Queues general parameters. It then plays MusicOnHold.wav in a loop.



OutgoingCall.XML

OutgoingCall.XML is the default script file for Outgoing Call event. Outgoing Call event is triggered when an agent places an outgoing telephone call.

It first reads Smart Queues general parameters. It then reads Smart Queues general parameters and sets recording flags accordingly.

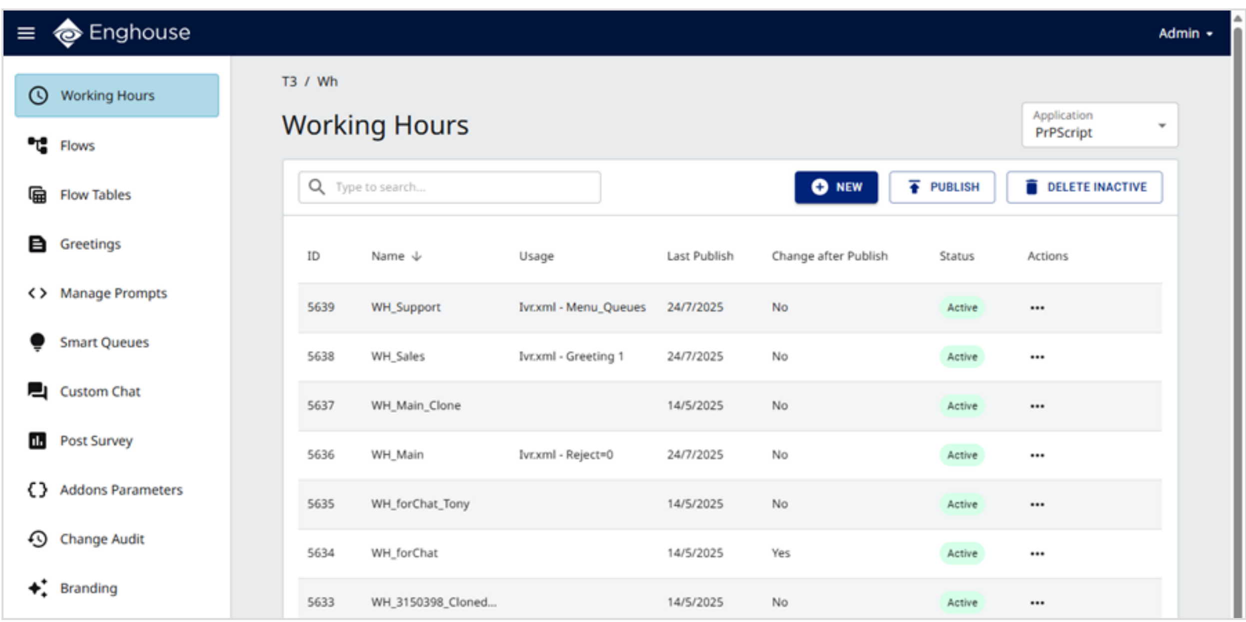


5: Working hours

This chapter contains the following information:

- Add a new working hours placeholder
- Edit a working hours placeholder
- Change working hours placeholder's permissions profile
- Duplicate a working hours placeholder
- Publish working hours placeholders
- Deactivate or reactivate a working hours placeholder
- Delete inactive working hours placeholders
- Use a different time zone for IVR
- Integrate the Working Hours module with Designer
- Working Hours Activation IVR application

The **Working Hours** page appears as follows.



For a description of the default working hours placeholders, see Working hours placeholders.

Overview

> **Note**
> Working hours placeholders may be defined by service providers or tenants. Both types are shown on the **Working Hours** page.

This section describes how to configure call treatments for non-working days and non-working hours by day-of-week and special dates calendars. It describes how to use a placeholder to define an event and assign the desired call treatments, and how to assign the event to the Weekdays and Special Dates calendars.

For example, the call center is closed from midnight to 8:00. The supervisors may select the hours and then select a designated afterhours flow for the callers to receive.

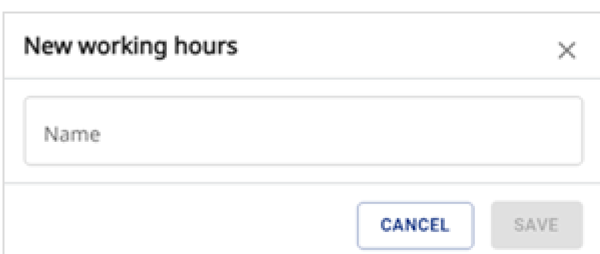
The afterhours flow can be any flow defined as a flow placeholder type. Customization of flows is done in the Flows module page introduced earlier. A flow may contain announcements, menus, and blocks. When a flow is customized for its final behavior by the tenant, for example, assign the flow to handle afterhours-calls. With Working Hours module page, you may further define special actions for holidays. For example, a supervisor may create a special announcement for a holiday, such as Independence Day. In terms of authorization, designated supervisors for each group in the tenant have a special permissions profile to make working hours changes for the relevant group(s) so calls landing on different groups may be treated with respect to the group's working hours.

Working Hours can be used as a standalone module by Advanced Developers.

Add a new working hours placeholder

1. On the **Working Hours** page, select the application in the **Application** list.
2. Click 

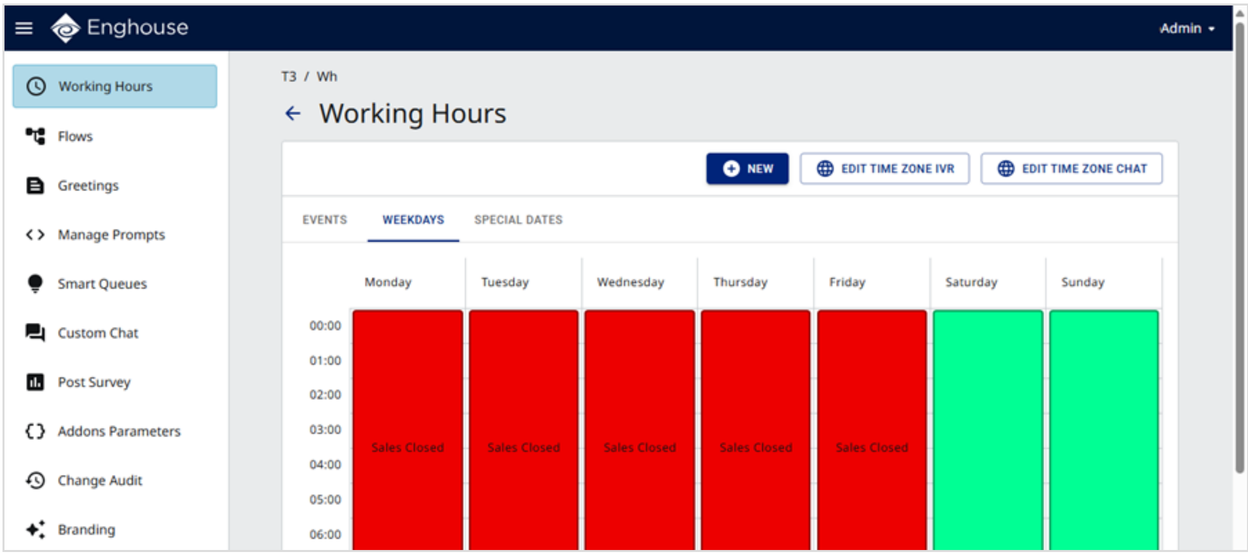
. The **New Working Hours** dialog appears.



3. In **Name**, enter a unique name for the new working hours placeholder.
4. Click **Save**. The new working hours placeholder appears on the **Working Hours** page.

Edit a working hours placeholder

1. On the **Working Hours** page, select the application in the **Application** list.
2. In the working hours placeholder's row, under **Actions**, click ••• and then click **Edit**. The **Working Hours** dialog appears.



From here you can:

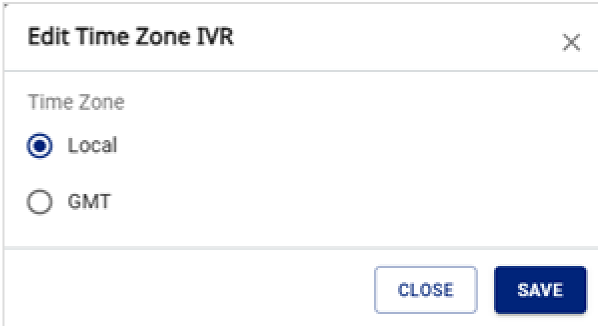
- Edit the IVR time zone
- Edit the chat time zone
- Manage events (add, edit, delete)
- Assign an event to the Weekdays calendar
- Assign an event to the Special Dates calendar
- Copy a special dates event
- Delete a special dates event

Edit the IVR time zone

> **Note**
> Time zone configuration defines the time zone of the respective calendars. The options are Local (default) and GMT. Check with your service provider for the definition of the local time zone. See also Use a different time zone for IVR.

1. Click 

. The **Edit Time Zone IVR** dialog appears.



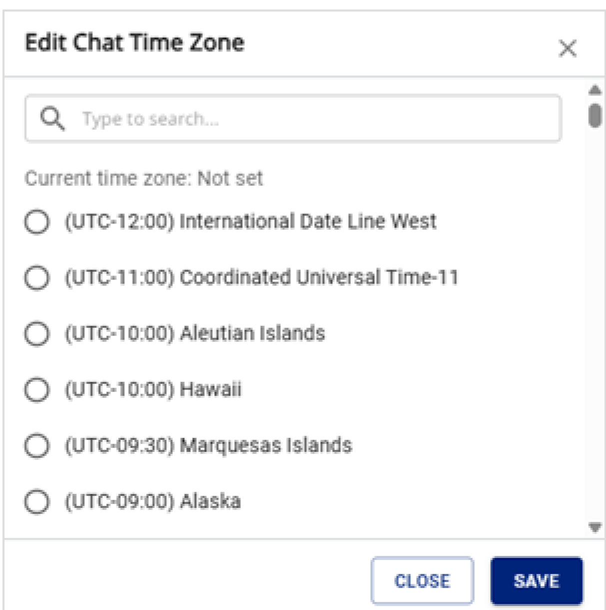
2. Select **Local** or **GMT**.
3. Click **Save**.

Edit the chat time zone

> **Note**
> Time zone configuration defines the time zone of the respective calendars. The default for the chat time zone is the server's local time.

1. Click 

. The **Edit Time Zone Chat** dialog appears.



2. Select the required time zone.
3. Click **Save**.

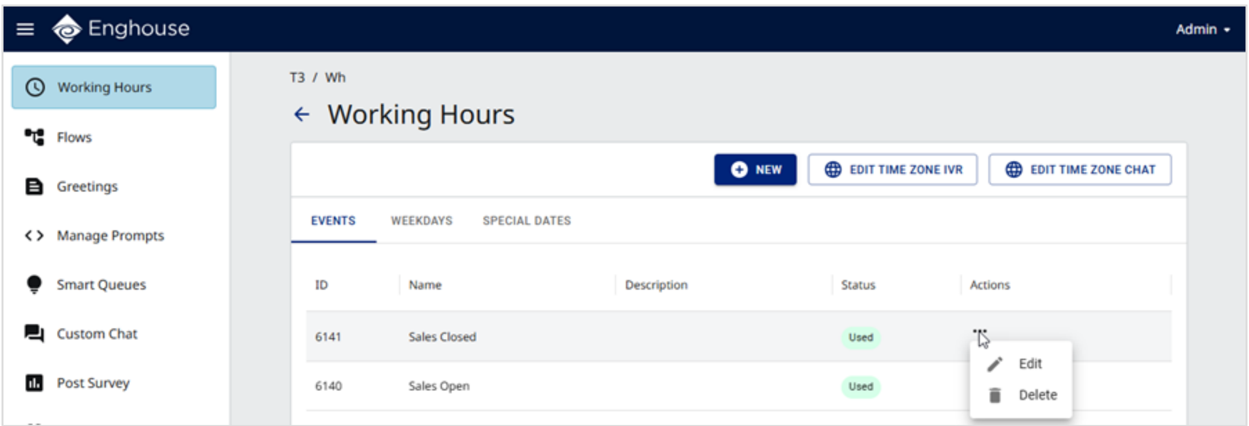
Manage events

Note

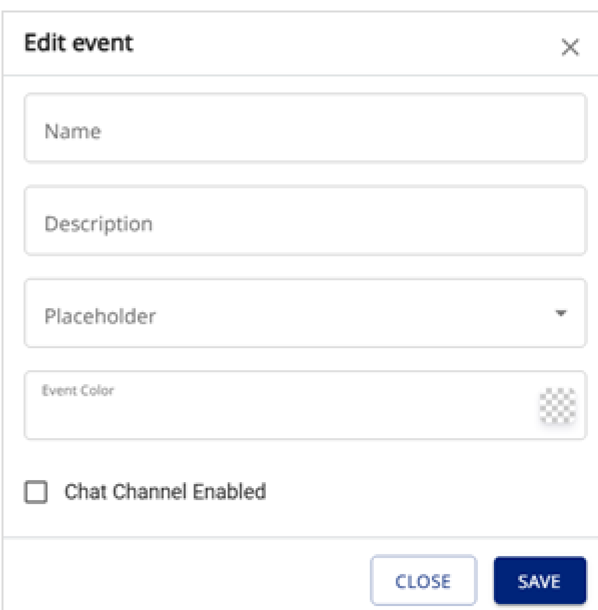
Define events for particular call treatments. After defining the events, assign them to the Weekdays or Special Dates calendars.

Add an event

1. Click the **Events** tab.



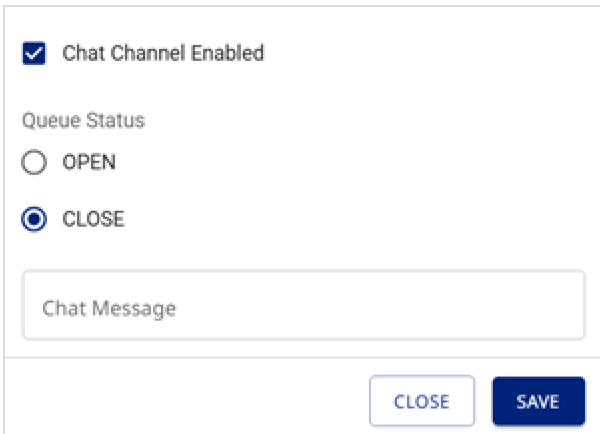
2. Click . The **Edit Event** dialog appears.



3. Enter the following information:

- **Name** — enter a unique name for the new event.
- **Description** (optional) — enter a description of the event.
- **Placeholder** — select a placeholder for the call treatment to apply for the event.
- **Event Color** — select the background color to use in the Weekdays calendar.

4. If you use the Social Connector, enter the following information:
   - **Chat Channel Enabled** — select the check box. The **Queue Status** options and **Chat message** text box appear.
   - **Queue Status** — select whether this event is for when the queue is open or closed.
   - **Chat Message** — enter the message you want to send for this event.



5. Click **Save.**

Edit an event

1. On the **Events** tab, in the event's row, under **Actions**, click ••• and then click **Edit**. The **Edit Event** dialog appears.
2. Configure the event as described above.
3. Click **Save.**

Delete an event

> **Note**
> Events currently in use cannot be deleted.

1. On the **Events** tab, in the event's row, under **Actions**, click ••• and then click **Delete**.
2. In the **Delete Event** dialog, click **Confirm**.

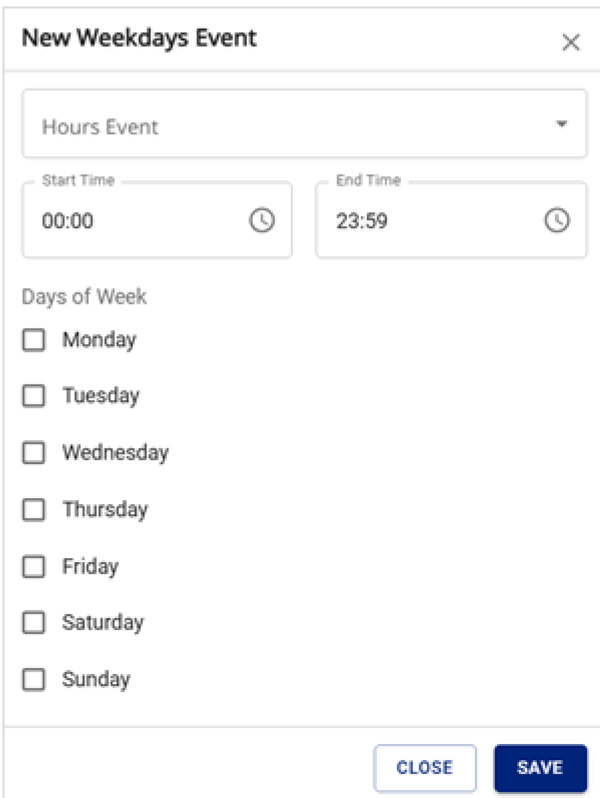
Assign an event to the Weekdays calendar

Note

- The Weekdays calendar does not support removing an event directly. To remove an existing event, replace it with another event in terms of day of week and time range.
- When adding an event that starts earlier or ends later then an existing event for any weekday, the existing event is automatically shrunk or split.

1. Click the **Weekdays** tab.
2. Click 

. The **New Weekdays Event** dialog appears.

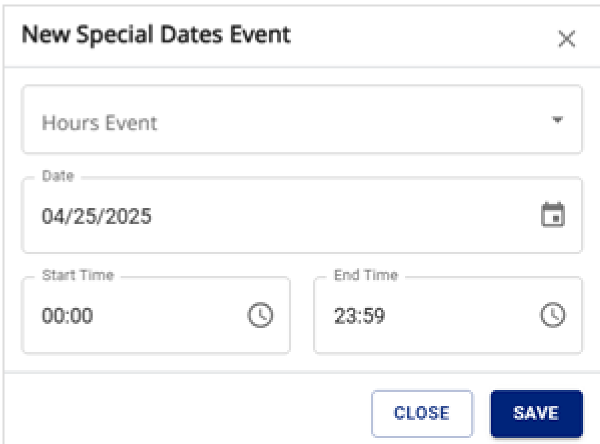


3. Enter the following information:
   - **Hours Event** — select an event in the list.
   - **Start Time** and **End Time** — select the times.
   - **Days of Week** — select the days of the week.
4. Click **Save**. The new event appears in the Weekdays calendar.

Assign an event to the Special Dates calendar

1. Click the **Special Dates** tab.
2. Click 

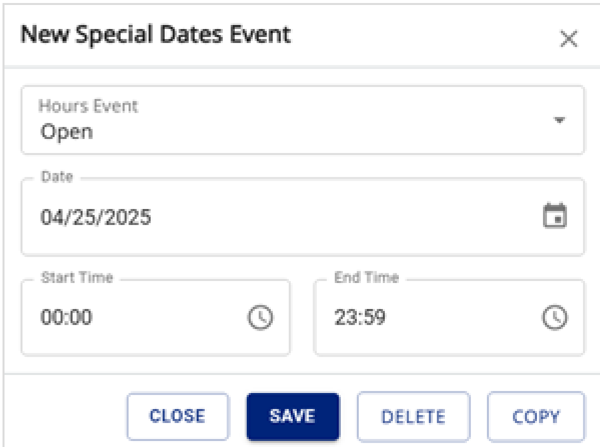
. The **New Special Dates Event** dialog appears.



3. Enter the following information:
   - **Hours Event** — select an event in the list.
   - **Date** — select the date.
   - **Start Time** and **End Time** — select the times.
4. Click **Save.** The new event appears in the Special Dates calendar.

Copy a special dates event

1. On the **Special Dates** tab, click an existing special date. The **New Special Dates Event** dialog appears.



2. Change the date on the calendar. The **Copy** button is now available.
3. Click **Copy.**

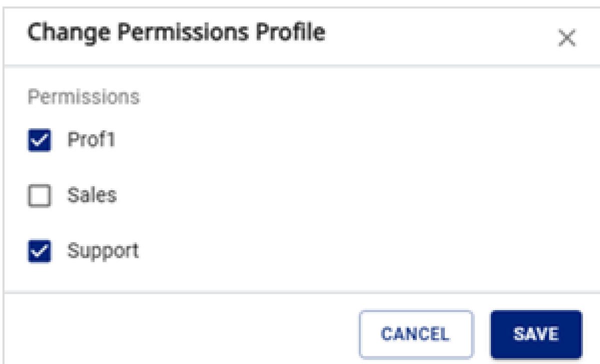
Delete a special dates event

1. On the **Special Dates** tab, click an existing special date. The **New Special Dates Event** dialog appears.
2. Click **Delete**.

Change working hours placeholder's permissions profile

To authorize regular supervisors to make changes:

1. On the **Working Hours** page, select the application in the **Application** list.
2. In the working hours placeholder's row, under **Actions**, click ••• and then click **Change Permissions Profile**. The **Change Permissions Profile** dialog appears.

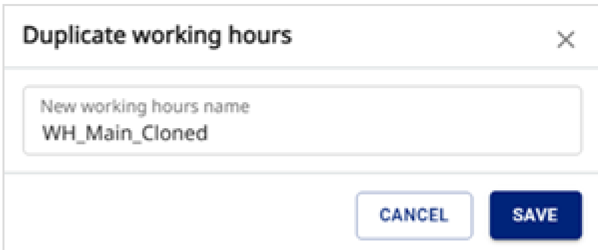


2. Select the permissions in the list.
3. Click **Save**.

Duplicate a working hours placeholder

1. On the **Working Hours** page, select the application in the **Application** list.

2. In the working hours placeholder's row, under **Actions**, click ••• and then click **Duplicate**. The **Duplicate Working Hours** dialog appears.



2. In **New working hours name**, enter a name for the duplicated working hours placeholder.
3. Click **Save.** The new working hours placeholder appears on the **Working Hours** page.

Publish working hours placeholders

1. On the **Working Hours** page, select the application in the **Application** list.
2. Do one of the following:

   To publish all working hours placeholders:

   a. Click 

   .
   b. In the **Publish All Working Hours** dialog, click **Publish**.

   To publish an individual working hours placeholder:

   a. In the working hours placeholder's row, under **Actions**, click ••• and then click **Publish**.
   b. In the **Publish Working Hours** dialog, click **Publish**.

Deactivate or activate a working hours placeholder

Stop

Do not inactivate or remove the WH_Main, WH_Support and WH_Sales placeholders. Removing these service provider-defined working hours placeholders breaks your copy of the application.

Deactivate a working hours placeholder

1. On the **Working Hours** page, select the application in the **Application** list.
2. In the working hours placeholder's row, under **Actions**, click and then click **Deactivate**.
3. In the **Deactivate Working Hours** dialog, click **Deactivate**.
4. On the **Working Hours** page, the working hours placeholder's status changes to **Inactive**.

Activate a working hours placeholder

1. In the working hours placeholder's row, under **Actions**, click and then click **Activate**.
2. In the **Activate Working Hours** dialog, click **Activate**.
3. On the **Working Hours** page, the working hours placeholder's status changes to **Active**.

Delete inactive working hours placeholders

Stop

Do not deactivate or remove the WH_Main, WH_Support and WH_Sales placeholders. Removing these service provider-defined working hours placeholders breaks your copy of the application.

Note

Alter you deactivate a working hours placeholder, the 

button appears.

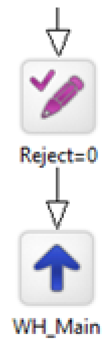
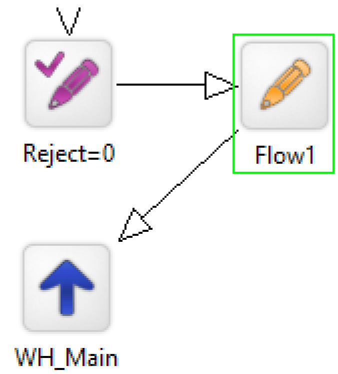
1. On the **Working Hours** page, click 

.
2. In the **Delete All Inactive Working Hours** dialog, click **Delete**.

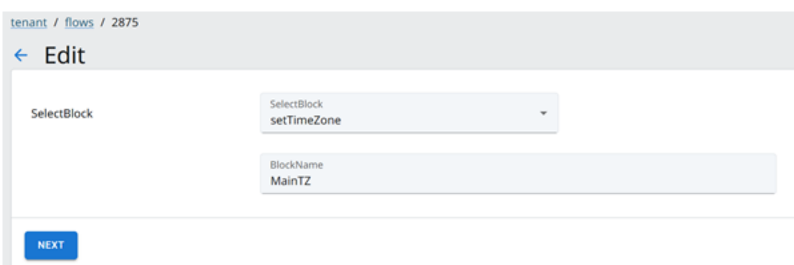
Use a different time zone for IVR

If you want to use a different time zone, you must follow the instructions in Edit the IVR time zone and select the **Local** time zone, and then configure it as shown in the following example. The following example is based on a template script.

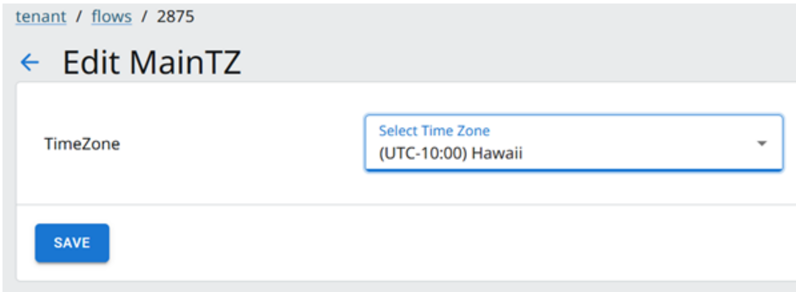
1. In Designer, edit *IVR.XML* as shown below.

From	To
	

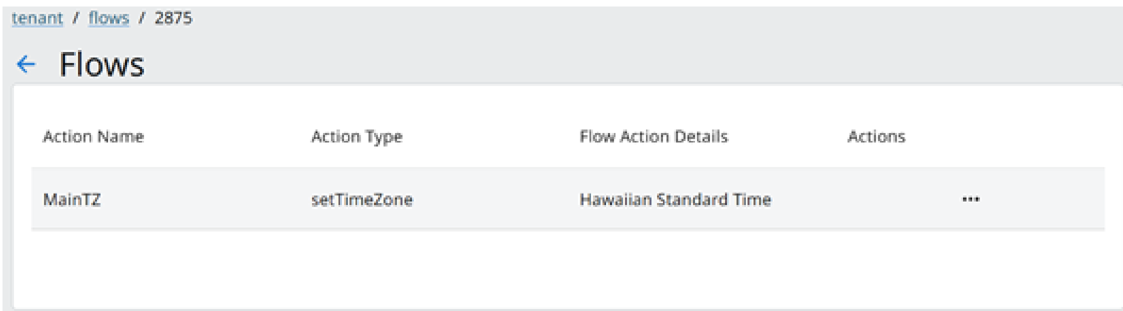
2. In the Provisioning Portal, click the **Flows** page.
3. Select the application and reload. See Reload flows.
4. Edit **Flow1** and add the block **setTimeZone.** See Edit a flow placeholder.



4. Click **Next**.
5. In the **Edit [Block Name]** dialog, select the **Time Zone**.



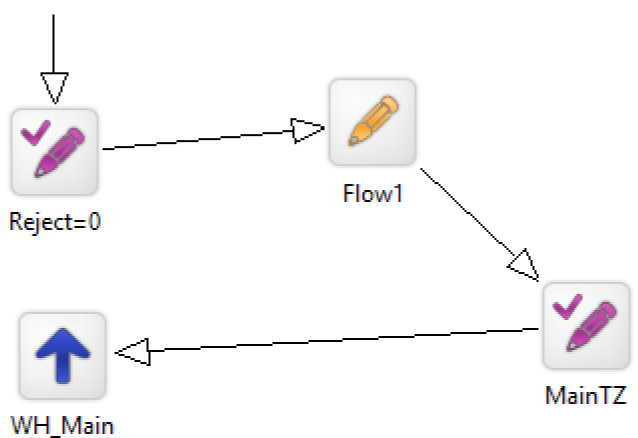
6. Click **Save**.



7. Click **Close**.
8. Publish the flow. See Publish flows.

Note

This is how it displays in Designer.



- If you have additional WorkingHours after your main working hours, for example, per Queue, they work with the main WH time zone until you add the block setTimeZone before them.
- If you want to use only one time zone, add it in the first working hours block in your IVR flow.

Integrate the Working Hours module with Designer (for advanced developers)

The Working Hours module can be used with an existing or a new IVR application flow. The customer can develop the full IVR flow using Designer and reuse the Working Hours module to check special dates and office hours. This enables the tenant to use the Provisioning Portal to manage hours.

1. Create the tenant folder under the Provisioning Portal scripts root DFS folder, for example, *D:\IVRScripts\{tenant ID}*
2. Copy the required Designer apps to the DFS folder, for example, *D:\IVRScripts\{tenant ID}\{Designer App folder}*
3. Adjust the required Designer apps for the Working Hours module:

    a. Expose the existing **office hours** flow of blocks as a flow placeholder with an Assign block and name it **Open**. This flow of blocks becomes an island.

    b. Expose the existing **non-office hours** flow of blocks as another flow placeholder with an Assign block and name it **Closed**. This flow of blocks becomes an island.

    c. Reload the required Designer apps in the Provisioning Portal Flows (UI).

    d. Create one working hours placeholder in the Provisioning Portal Working Hours (UI) and call it **Flow1_WH.**

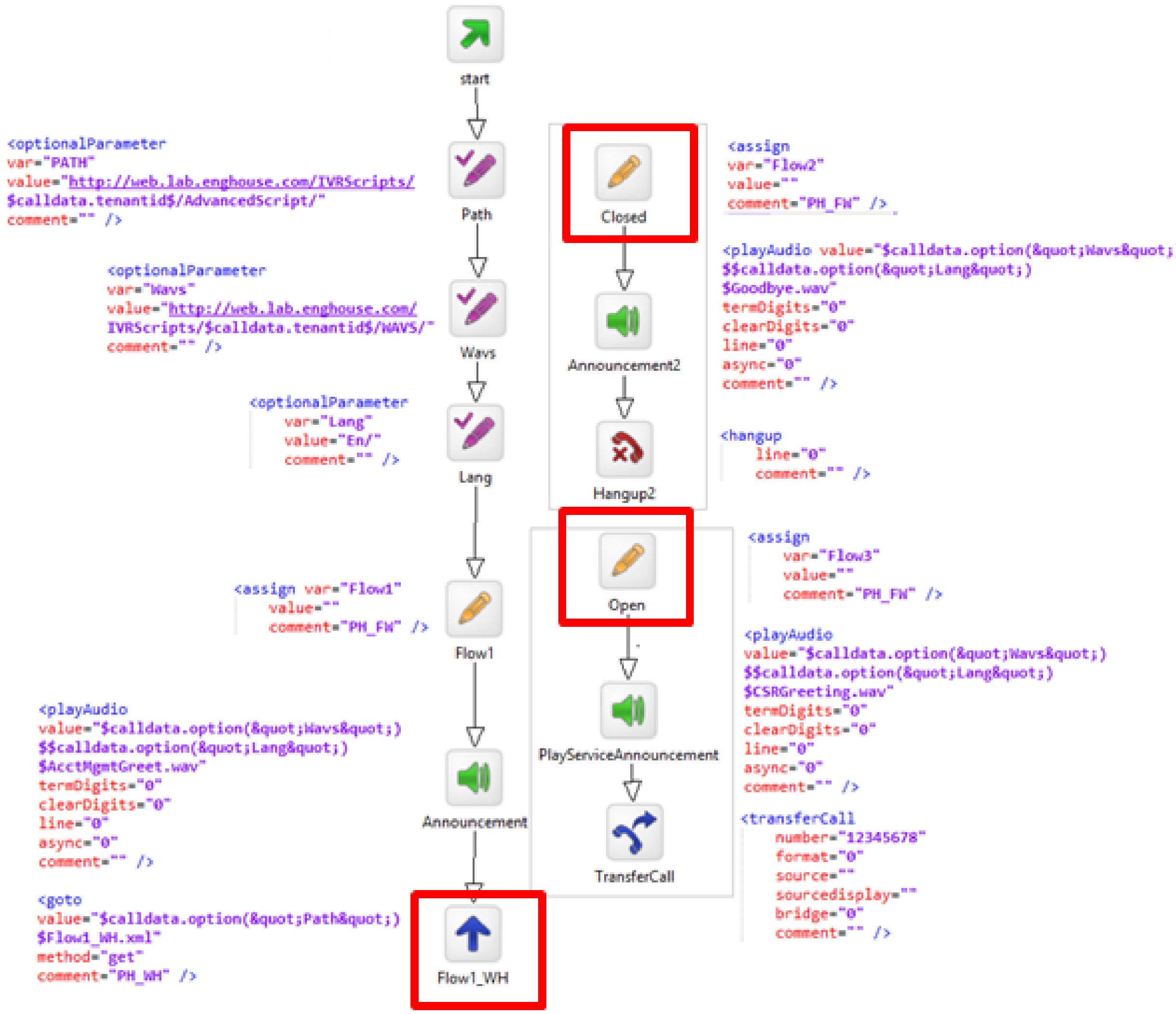
    e. Create two events in **Flow1_WH** and name them **Open** event and **Closed** event. Point the events to the respective flows created earlier (**Open**, **Closed**), and create the respective event schedules in the **Weekdays** and **Special Dates** calendars.

    f. Publish **Flow1_WH.**

    g. Go back to Designer and open the freshly published scripts. Join **Flow1_WH** from where **Open** was originally connected and save the Designer app.

    h. Go back to Provisioning Portal and reload the Designer app.

Consider the following IVR flow.



Block	Description
Flow1_WH	This is the working hours placeholder injected by the Provisioning Portal Working Hours (UI). If calls arrive during office hours, calls GOTO Open, otherwise calls GOTO Closed.
Open	This is the **Open** flow placeholder that was connected from the Announcement block. It is an island of blocks for working hours.
Closed	This is the **Closed** flow placeholder. It is an island of blocks for after hours.

Working Hours Activation IVR application

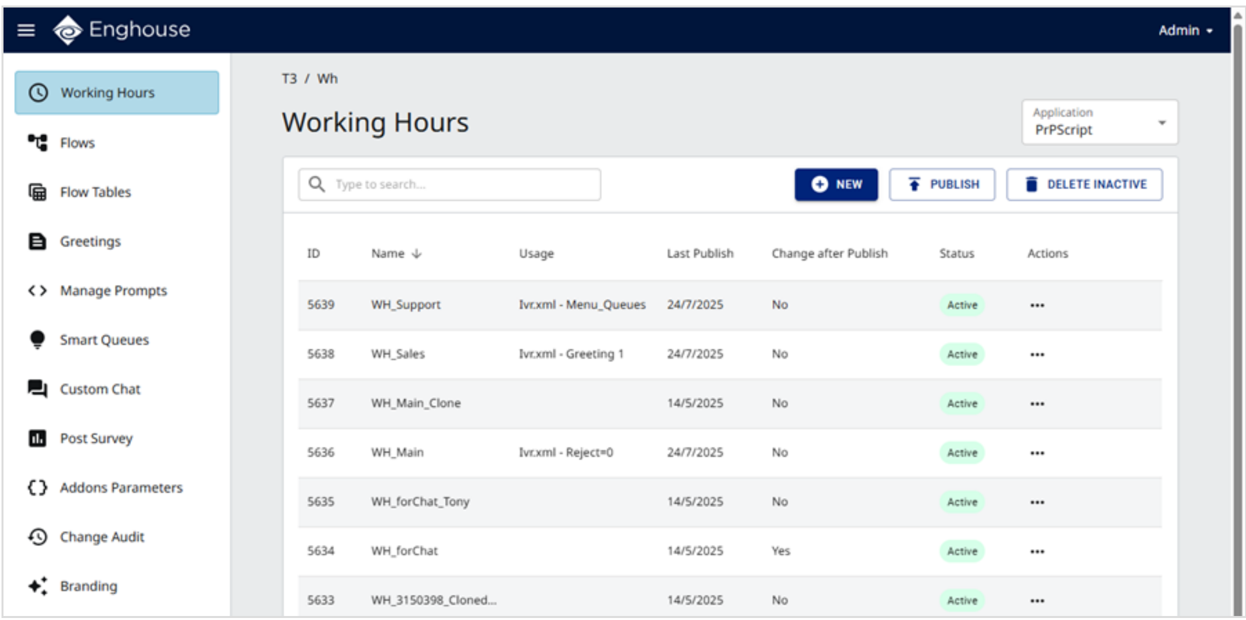
The PrP Helper's **Working Hours Activation** application is an IVR application that enables you to:

- Create a new Special Date
- Replace an Event for the current Special Date (Today)
- Deactivate a current Special Date (Today)

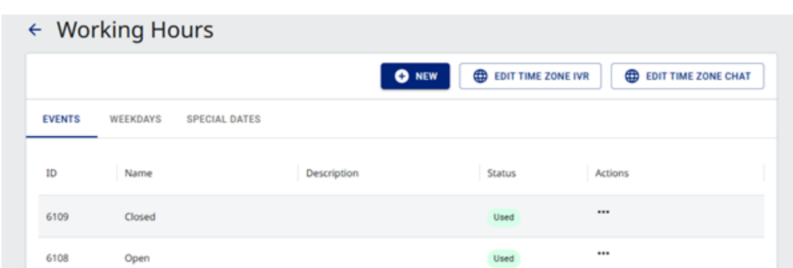
The *WorkingHours.xml* is published to the specific application folder.

To use this application, you need to provide the following details:

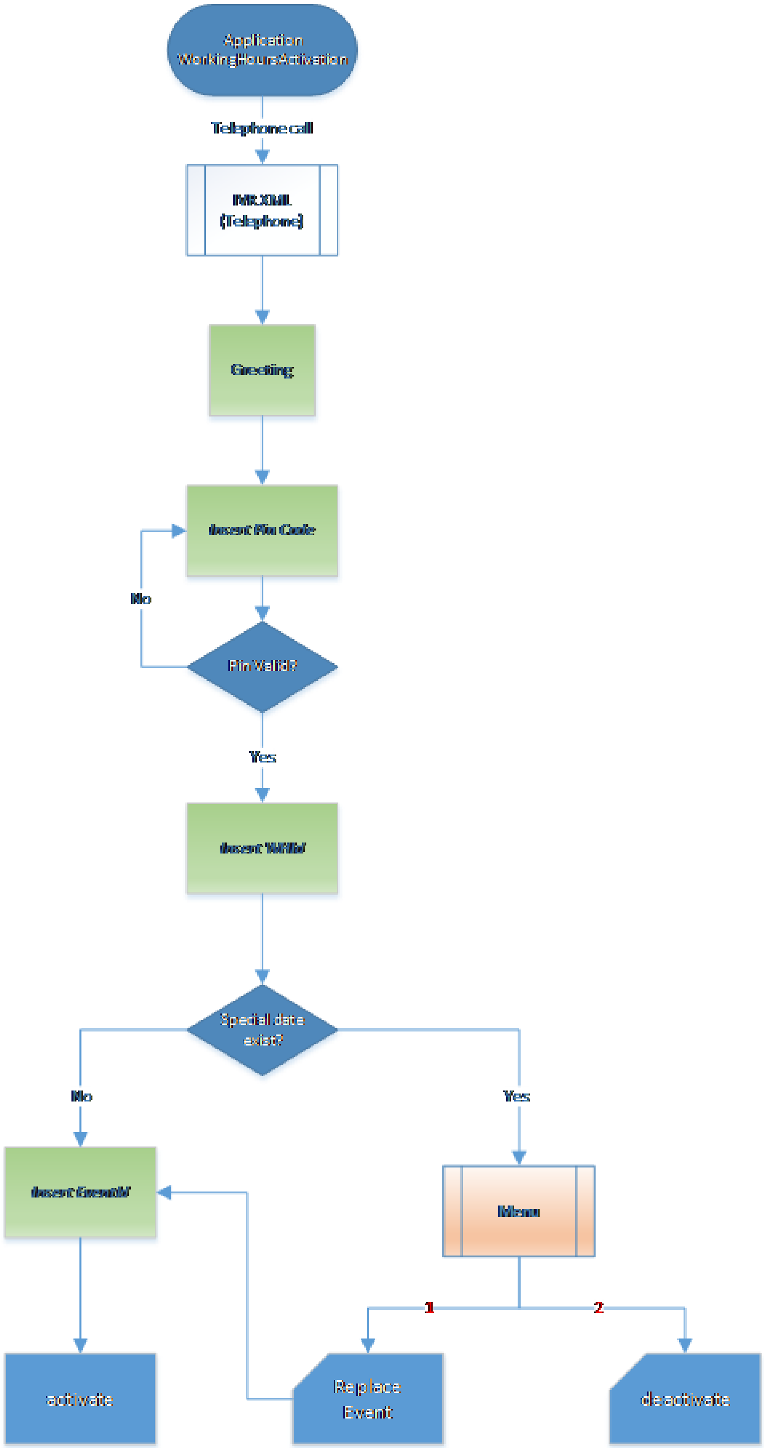
- **Pin code** provided by the landlord that configured this application for you
- **Working Hours ID** from the **Working Hours** page



- **Event ID** from the **Events** tab



The **Working Hours Activation** application flow is as follows.



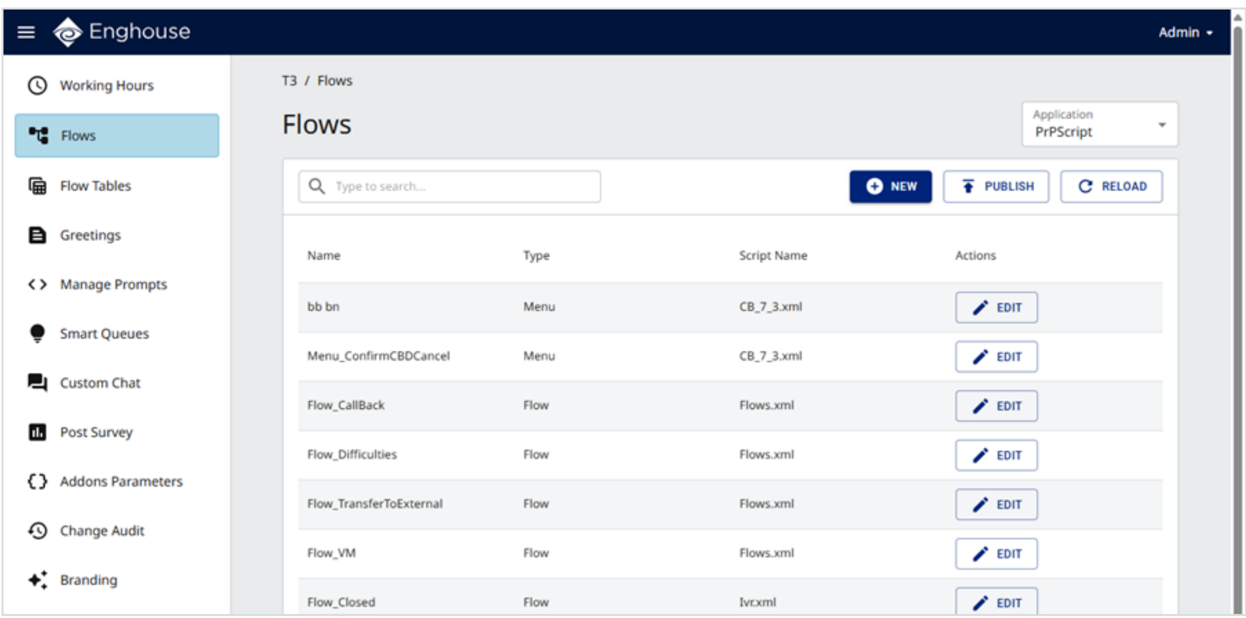
Application WorkingHoursActivation
Telephone call
IVR XML (Telephone)
Greeting
Insert Pin Code
No
Pin Valid?
Yes
Special date exist?
No
Yes
Menu
1
2
activate
Replace Event
deactivate

6: Flows

This chapter contains the following information:

- Define placeholders in flows with Designer
- Add a new flow placeholder
- Edit a flow placeholder
- Edit an announcement flow placeholder
- Edit a menu flow placeholder
- Publish flows
- Reload flows
- Integrate Flows module with existing IVR application

The **Flows** page appears as follows.



For a description of the default flow placeholders, see Flow placeholders.

Overview

This section describes how to configure a flow placeholder, which is a collection of customization points in the applications for the tenants exposed by the source template of the subscribed service package option.

The service providers decide which Designer blocks to expose as customization points in the Flows module page to the tenant administrators. These customization points are referenced as placeholder entries on the Flows page.

> **Note**
> The flow placeholders that come with your tenant are sufficient in most cases. If you need additional flow placeholders, consult with your service provider

A flow placeholder may be referenced by any of the following:

- Event defined in a working hours placeholder on the Working Hours page
- Menu placeholder type on the Flows page
- Flow placeholder type on the Flows page

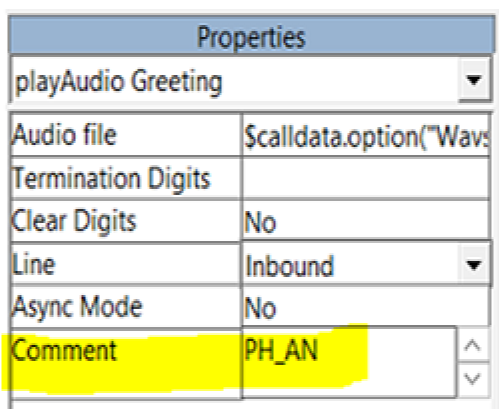
Define placeholders in flows with Designer (for service providers)

To define a placeholder, enter the label of the desired placeholder type in the comment field of any existing Designer block.

Below is a table of supported placeholder types.

Placeholder	Label	Description	Designer block
PLACE_HOLDER_TYPE_MENU	PH_MN	Menu placeholder	Menu
PLACE_HOLDER_TYPE_FLOW	PH_FW	Flow placeholder	Assign
PLACE_HOLDER_TYPE_ANNOUNCEMENT	PH_AN	Announcement placeholder	Play Audio
PLACE_HOLDER_TYPE_WORKING_HOURS	PH_WH	Working hours placeholder	GoTo block (point to the working hours XML)

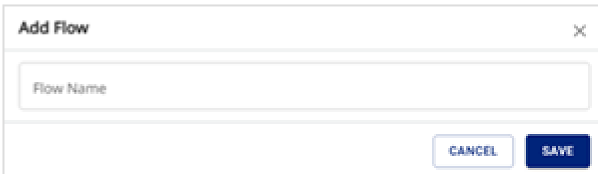
Below is a sample placeholder defined by a script developer in the Designer script.



Add a new flow placeholder

> **Note**
> A new flow placeholder is created only in the *IVR.xml*. If you need to remove it or change its name, you must do this in Designer and then reload the application in Provisioning Portal to get the changes.

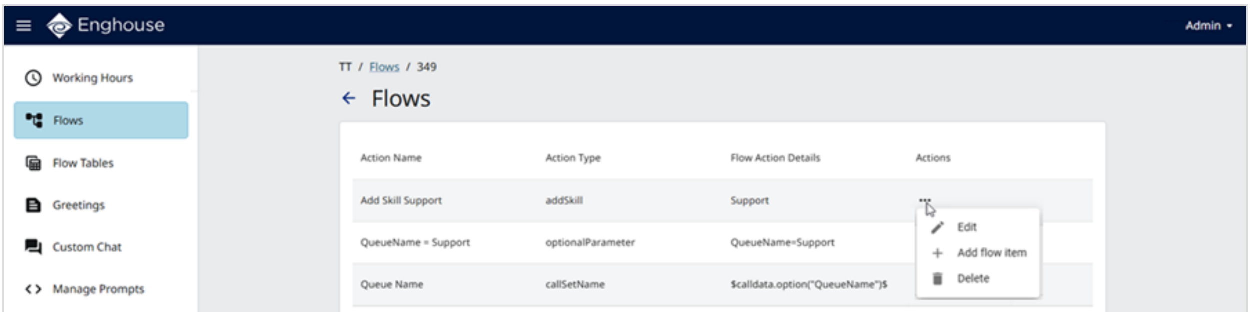
1. On the **Flows** page, select the application in the **Application** list.
2. Click NEW. The **Add Flow** dialog appears.



3. In **Flow Name**, enter a unique name for the flow placeholder.
4. Click **Save**. The new flow placeholder appears on the **Flows** page.

Edit a flow placeholder

1. On the **Flows** page, select the application in the **Application** list.
2. In the flow placeholder's row, click EDIT. The **Flows** dialog appears.



From here you can:

- Edit a flow action
- Add a flow item
- Delete a flow action

Supported action types

Provisioning Portal has eight action types that inherit selected actions defined in *XMLInterrupter.vbs* for Designer. The following table shows the mapping.

Provisioning Portal action type	**Designer block**
addSkill	Add Skill
callSetName	Queue Name
hangup	Hangup
optionalParameter	Optional Parameters
playAudio	Play Audio
recordVoicemail	Record Voicemail
Add Menu	Menu
TransferCall	Transfer Call

Provisioning Portal action type	Designer block
Terminate	Terminate
Get Agent Statistics	Get Agent Statistics
Get Queue Statistics	Get Queue Statistics

Provisioning Portal defines five additional actions types that are available for Provisioning Portal use only.

Some of these actions provide the ability to link (point with an arrow) a block in the script to a placeholder. Linking is only possible in the same script.

Other actions combine existing Designer block and XMLInterpreter change behavior.

Provisioning Portal action type	Description
setLanguage	Use the block Optional Parameter to save the desire language for play the prompts. The supported languages list comes from the **Manage Prompts** page.
SetTimeZone	Use the block Optional Parameter to save the desire time zone that you want to use with the Working Hours flow.
Menu List	Links a selected block to a selected menu placeholder in the script.
Working Hours List	Links a selected block to a selected working hours placeholder in the script. This feature also adds a working hours placeholder to the script, if it does not exist.
Flow List	Links a selected block to a selected flow placeholder in the script.

Edit a flow action

1. In the action's row, under **Actions**, click ••• and then click **Edit**. The **Edit** dialog appears.
2. To specify values for the remaining fields, refer to the on-screen instructions and *Designer Help*.
3. Click **Save**.

Add a flow item

Note

- Block name must be unique in your tenant. When you try to reuse a block name, the system prompts that *The block name already exist*.
- Menu List, Flow List and Working Hours List in the **Select Block** list for menuLink, flowLink and

workingHoursLink respectively appear when none of these block types exist in the current branch. One instance of either one of these types can be added to the branch. When one instance of either one of the types exist in the branch, Menu List, Flow List and Working Hours List are hidden.

- Block Location options appear when inserting an Action to the Flow. When adding the first Action, Add Block does not prompt for Block Location options, the Action is always added as the first Action. When adding Action to menuLink, flowLink or workingHoursLink, Block Location options is always Before current block, the Action is always added before the current block.

Stop

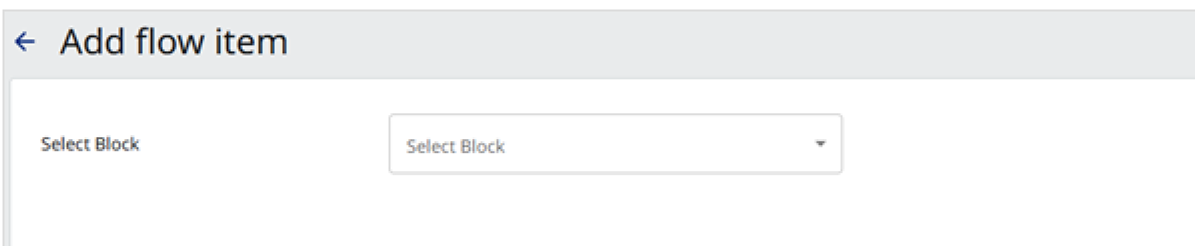
When assigning a flow with a Flow List block, be very careful not to create an infinite loop.

For example:

- Flow1 is the source flow containing the actions you defined, and the flow has only one exit that joins Flow2. Flow2 is the target flow that Flow1 is added to as an action type with a Flow List block.
- This scenario has a logical error that the system is unable to detect. The call will loop infinitely until the call times out in IVR and the system automatically terminates the call.

1. Do one of the following:
    - To add the first action, click ADD.
    - To add another action, in the action's row, under **Actions**, click ••• and then click **Add flow item**.

   The **Add flow item** dialog appears.



2. Enter the following information:
    - **Select Block** — select the action from the list.
    - **Block Name** — enter a unique name.
3. Click **Next**.
4. To specify values for the remaining fields, refer to the on-screen instructions and *Designer Help*.
5. Click **Save**.

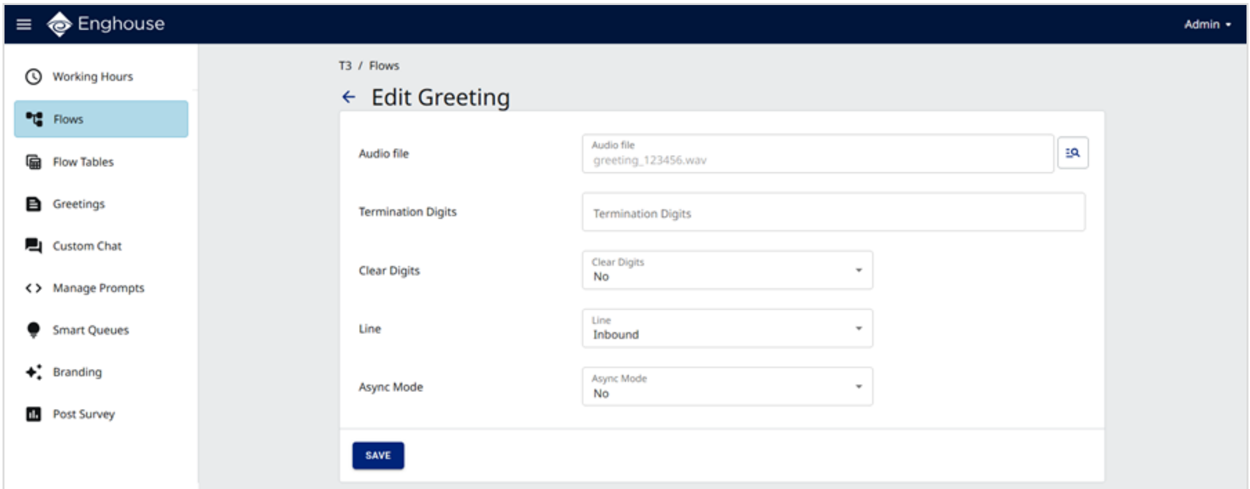
Delete a flow action

1. In the action's row, under **Actions**, click ••• and then click **Delete**.
2. In the **Delete Flow Action** dialog, click **Delete**.

Edit an announcement flow placeholder

1. On the **Flows** page, select the application in the **Application** list.
2. In the announcement flow placeholder's row, click 

. The **Edit [announcement name]** dialog appears.

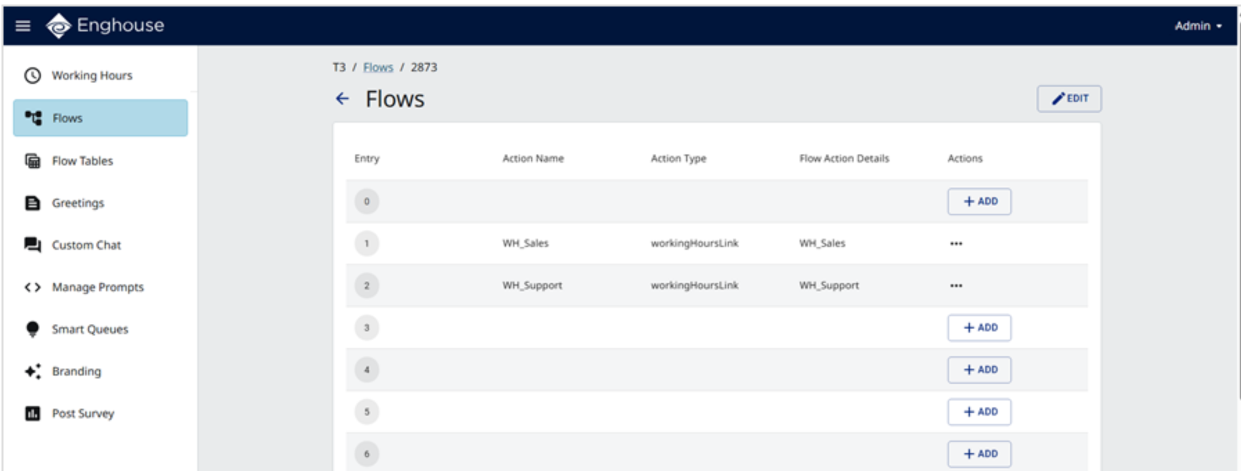


3. Click  next to the **Audio file** field. The **Choose Prompt** dialog appears. Select the prompt to use and click **Save**.
4. Refer to the Designer Help to specify values for the remaining fields.
5. Click **Save**.

Edit a menu flow placeholder

1. On the **Flows** page, select the application in the **Application** list.
2. In the menu flow placeholder's row, click 

. The **Flows** dialog appears.



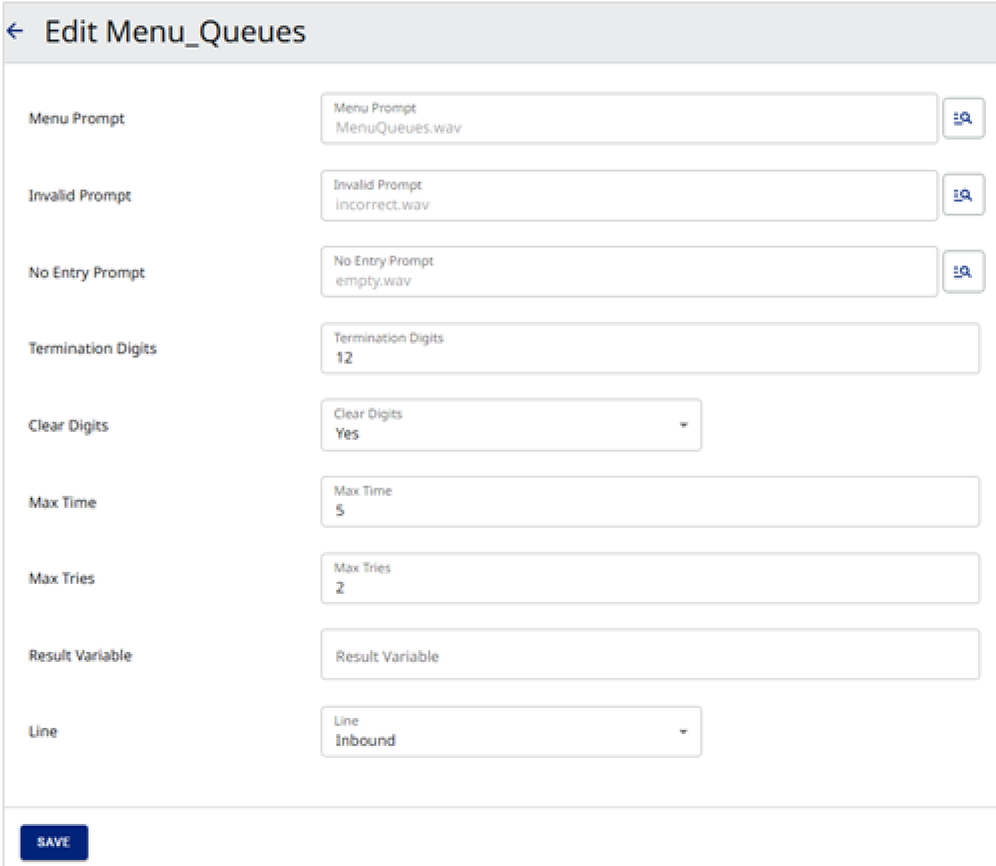
In the **Flows** dialog, the menu branches according to the input of the phone caller. The possible branches are: **0** ... **9**, **#**, ***** and **Else**.

Each branch accepts zero or more actions. The supported action types include: addSkill, callSetName, hangup, optionalParameter, setLanguage, playAudio, recordVoicemail, transferCall, terminate, getAgentStats, getQueueStats, Add Menu, Menu List, and Flow List.

For information about adding, editing, and deleting flow actions, see Edit a flow placeholder.

3. At the top of the **Flows** dialog, click 

. The **Edit [menu name]** dialog appears.



4. Refer to the on-screen instructions and Designer Help to specify values for the remaining fields.
5. Click **Save.**

Publish flows

When publishing flows, Provisioning Portal commits flows customization to a pre-configured network path. The Web farm (IIS instances) references this path as the physical path (source path) of the scripts virtual folder for your tenant.

> **Stop**
>
> Check with your service provider for the exact publishing behavior before using this feature. Depending on the system configuration, the path to write flows (publish) may be the same as the path to read flows (reload), or the two paths may be different.

> **Caution**
>
> If the two paths are different, *publishing* means committing flows customization on top of the last synchronized flows copy, in which, the last synchronized copy may be different from the *production* copy.

> **Note**
>
> - If both paths are the same, publishing means committing flows customization made on top of the *production* copy.
> - The value for the PublishScriptFolder key is configured in the *PS.ProvisioningPortal web.config* file:
>
> ```
> <add key="PublishScriptFolder" value="\\{FQDN}\IVRScripts\{tenantId}\
> {appName}\" />
> ```
>
> - The value for the ReloadScriptFolder key is configured in the *PS.ProvisioningPortal web.config* file:
>
> ```
> <add key="ReloadScriptFolder" value="\\{FQDN}\IVRScripts\{tenantId}\
> {appName}\" />
> ```
>
> - Provisioning Portal creates a backup of files to be updated. The backup files are located in the following folder: *Flows_PublishedFilesBackup{Date.Now}*
> - Provisioning Portal keeps track of Publish and Reload by using the Provisioning Portal database. It does so by duplicating the application’s data and providing a new version of it. Currently only ASG engineers can revert the application to a specific version.

To publish the flows:

1. On the **Flows** page, click 

.
2. In the **Publish** dialog, click **Publish**.

Reload flows

Reload is usually needed when changes were made to your copy of the script template by the service provider. When reloading flows, Provisioning Portal reads scripts from a pre-configured network path.

> **Stop**
>
> Before using this feature, check the exact publishing behavior with your service provider.

> **Note**
>
> Depending on the system configuration, the path to write flows (publish) may be the same as or different from the path to read flows (reload).
>
> - When the paths are the same, reloading means reverting flows to the *production* copy.
> - When the paths are different, reloading means reverting flows to the *last synchronized* copy, which may be different from the production copy.

To reload flows:

1. On the **Flows** page, click 

.
2. In the **Reload** dialog, click **Reload**.

Integrate the Flows module with an existing IVR application (for advanced developers)

The Flows module can be used with an existing or new IVR application flow. The customer can develop the full IVR flow using Designer and the Flows module.

1. Create the tenant folder under the Provisioning Portal scripts root DFS folder, for example, *D:\IVRScripts\{tenant ID}*
2. Copy the required Designer apps to the DFS folder, for example, *D:\IVRScripts\{tenant ID}\{Designer App folder}*
3. Adjust the required Designer apps for the Flows module:

    a. Create a placeholder in *IVR.xml* from Designer using one of the following blocks:

    - Prompt (Play block) – PH_AN comment
    - Menu (Menu block) – PH_MN comment
    - Flow (Assign block) – PH_FW comment

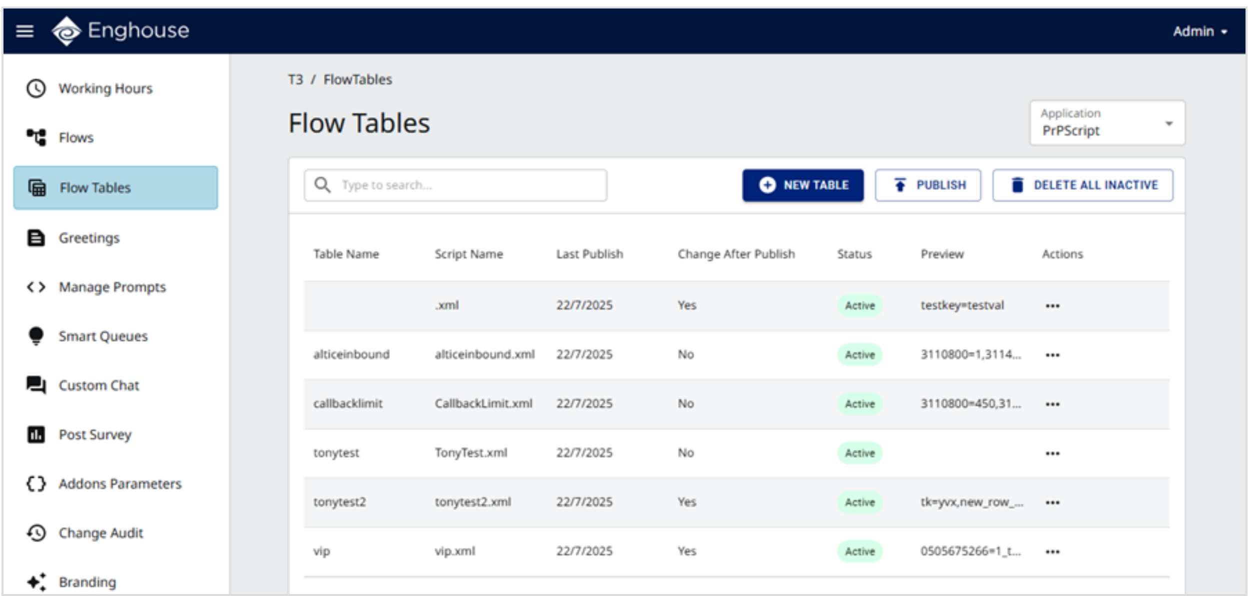
    b. Reload the required Designer apps in the Provisioning Portal Flows (UI). Edit the placeholder or create a new flow using the Provisioning Portal.

7: Flow tables

This chapter contains the following information:

- Add a new flow table
- Edit a flow table
- Change flow tables permissions profile
- Publish flow tables
- Deactivate a flow table
- Delete all inactive flow tables
- Use a flow table in Designer

The **Flow Tables** page appears as follows.



Overview

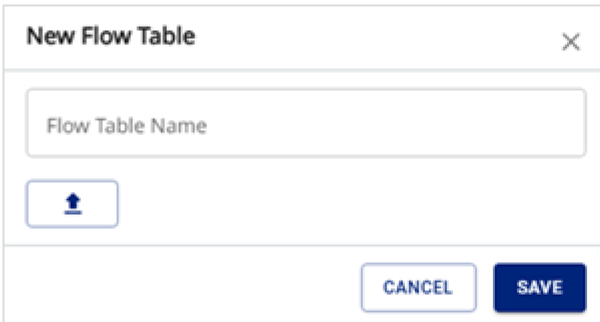
This section describes how to configure a table that can be used in the application flow for decision making. This table is similar to the Table block but has fixed columns.

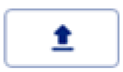
Add a new flow table

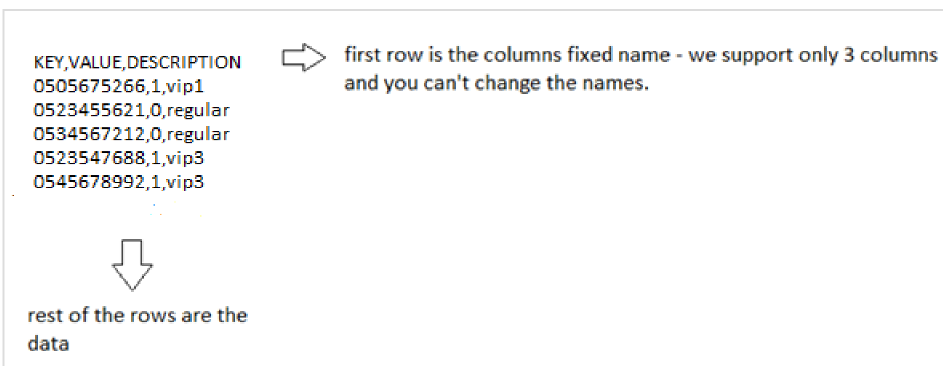
Note
To add an empty new flow table, click **Save** without uploading a CSV file.

1. On the **Flow Tables** page, select the application in the **Application** list.
2. Click 

. The **New Flow Table** dialog appears.



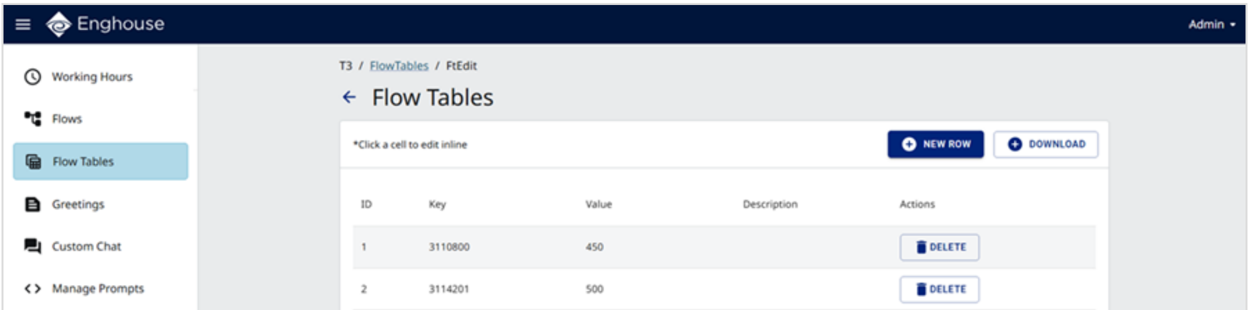
3. In **Flow Table Name**, enter a unique name.
4. Click  to upload a CSV file with your data (optional). The file structure must be as follows.



5. Click **Save**. The new flow table appears on the **Flow Tables** page.

Edit a flow table

1. On the **Flow Tables** page, select the application in the **Application** list.
2. In the flow table's row, under **Actions**, click ••• and then click **Edit**. The **Flow Tables** dialog appears.



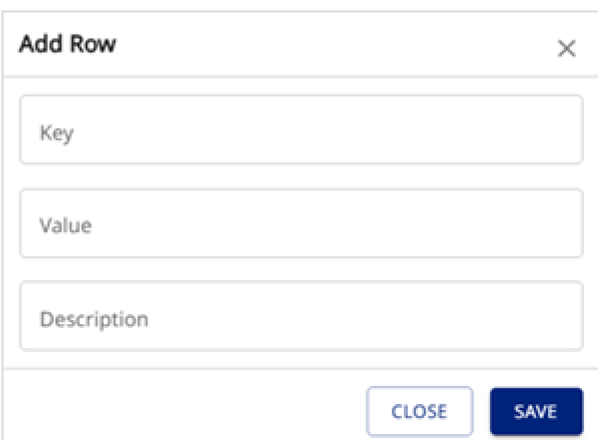
From here you can:

- Add a new row
- Edit existing data
- Delete a row
- Download the flow table

Add a new row

1. In the **Flow Tables** dialog, click 

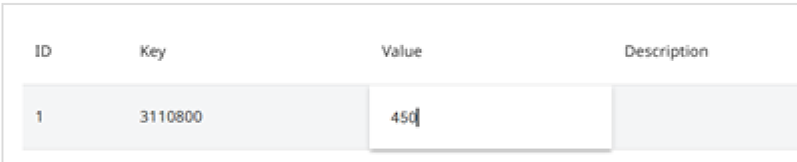
. The **Add Row** dialog appears.



2. Enter the **Key**, **Value**, and **Description**.
3. Click **Save**.

Edit existing data

1. In the **Flow Tables** dialog, click on the specific field you want to change. An edit box appears.



2. Edit the data.
3. Click outside the field.

Delete a row

1. In the **Flow Tables** dialog, in the key's row, under **Actions**, click 

. The **Delete Flow Table Item** dialog appears.
2. Click **Confirm**.

Download a flow table

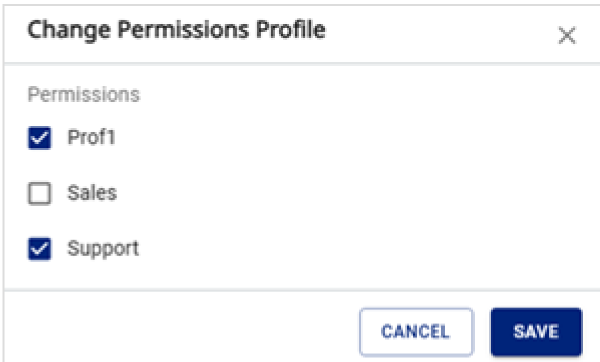
1. In the **Flow Tables** dialog, click 

.
2. The current data is saved as a CSV file to your downloads folder.

Change flow tables permissions profile

To authorize regular supervisors to make changes:

1. On the **Flow Tables** page, select the application in the **Application** list.
2. In the flow table's row, under **Actions**, click ••• and then click **Change Permissions Profile**. The **Change Permissions Profile** dialog appears.



3. Select the permission profiles in the list.
4. Click **Save**.

Publish flow tables

Note

When you publish a flow table, an xml file (for example, *tenantlist.xml*) is created in the application folder.

If the file already exists, a backup folder is created with the previous version. The folder name is *FlowsTables_PublishedFilesBackup{DATE&TIME OF PUBLISHED}*

1. On the **Flow Tables** page, select the application in the **Application** list.
2. Do one of the following:

   To publish all flow tables:

   a. Click 

.
   b. In the **Publish All Flow Tables** dialog, click **Publish**.

   To publish an individual flow table:

   a. In the flow table's row, under **Actions**, click ••• and then click **Publish**.
   b. In the **Publish** dialog, click **Publish**.

Deactivate or reactivate a flow table

Deactivate a flow table

1. On the **Flow Tables** page, select the application in the **Application** list.
2. In the flow table's row, under **Actions**, click ••• and then click **Deactivate**.
3. In the **Deactivate Flow Table** dialog, click **Deactivate**.
4. On the **Flow Tables** page, the flow table's status changes to **Inactive**.

Reactivate a flow table

1. In the flow table's row, under **Actions**, click ••• and then click **Activate**.
2. In the **Activate Flow Table** dialog, click **Activate**.
3. On the **Flow Tables** page, the flow table's status changes to **Active**.

Delete all inactive flow tables

> **Note**
>
> Alter you inactivate a flow table, the DELETE ALL INACTIVE button appears.

1. On the **Flow Tables** page, click DELETE ALL INACTIVE.
2. In the **Delete All Inactive** dialog, click **Delete**.

Delete all inactive flow tables

> **Note**
>
> Alter you inactivate a flow table, the DELETE ALL INACTIVE button appears.

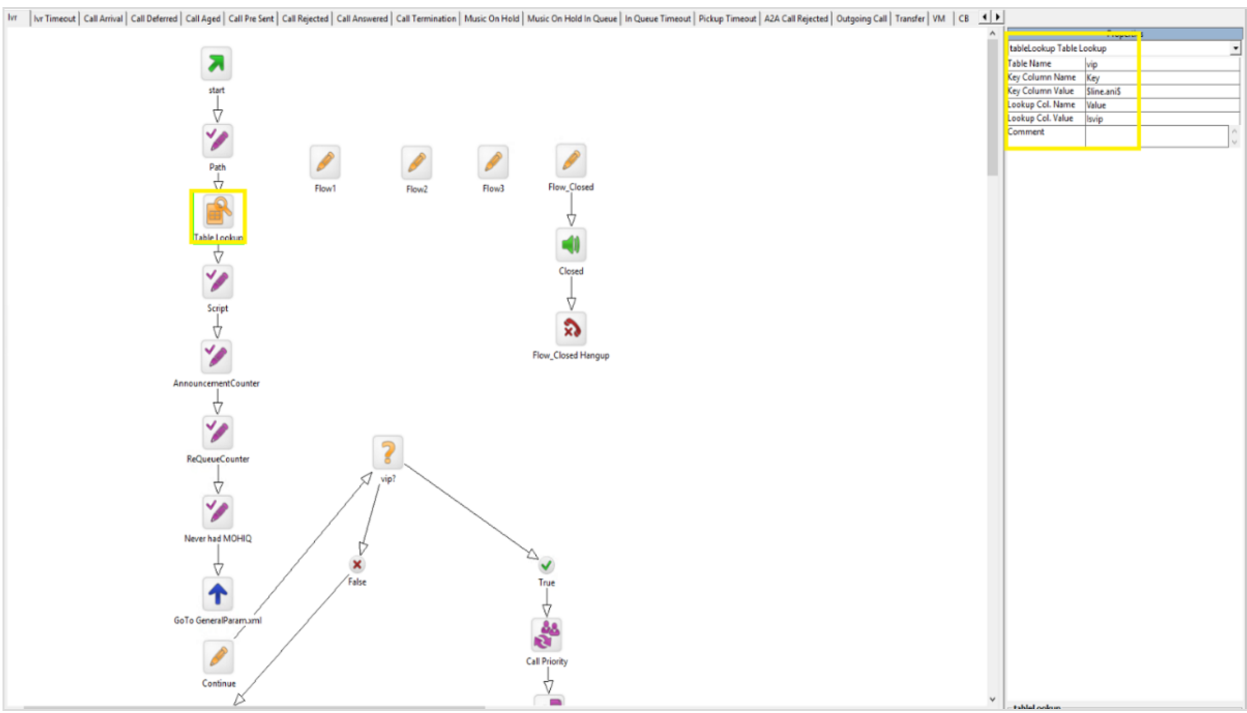
1. On the **Flow Tables** page, click DELETE ALL INACTIVE.
2. In the **Delete All Inactive** dialog, click **Delete**.

Use a flow table in Designer

> **Note**
> Although you can see the content of the flow table in Designer, by using the Table block, you can only edit the table in the Provisioning Portal.

After you publish your flow table, to use it you need to edit your application using Designer.

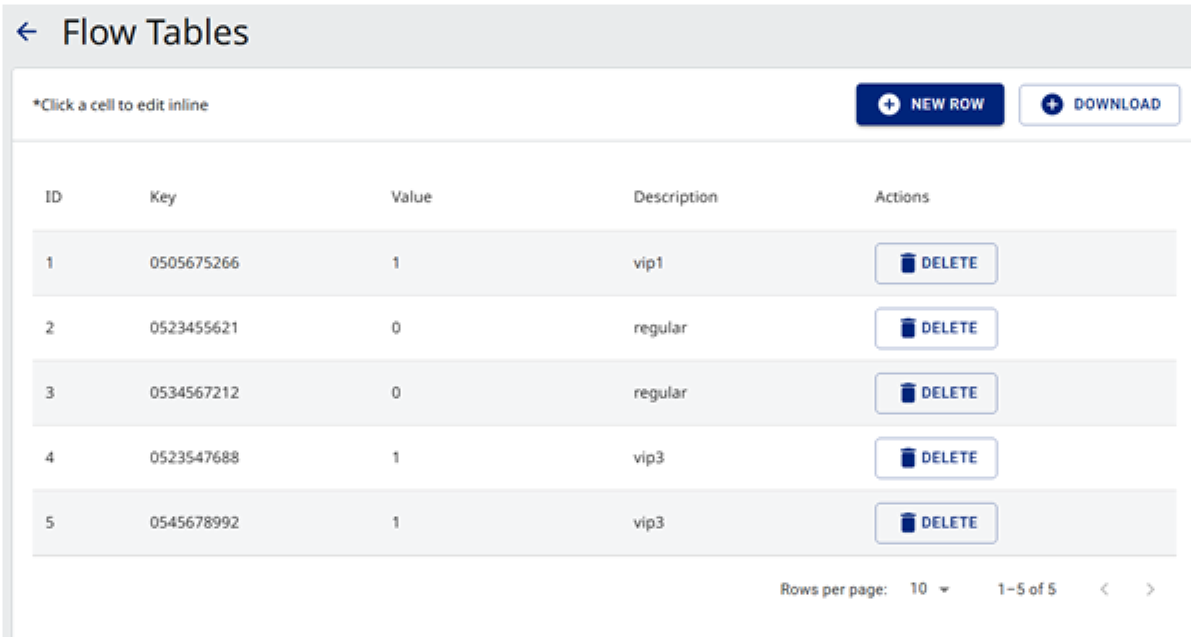
1. In your application, add a Table Lookup block.



2. Set the Table Lookup block's properties as shown in the example below.

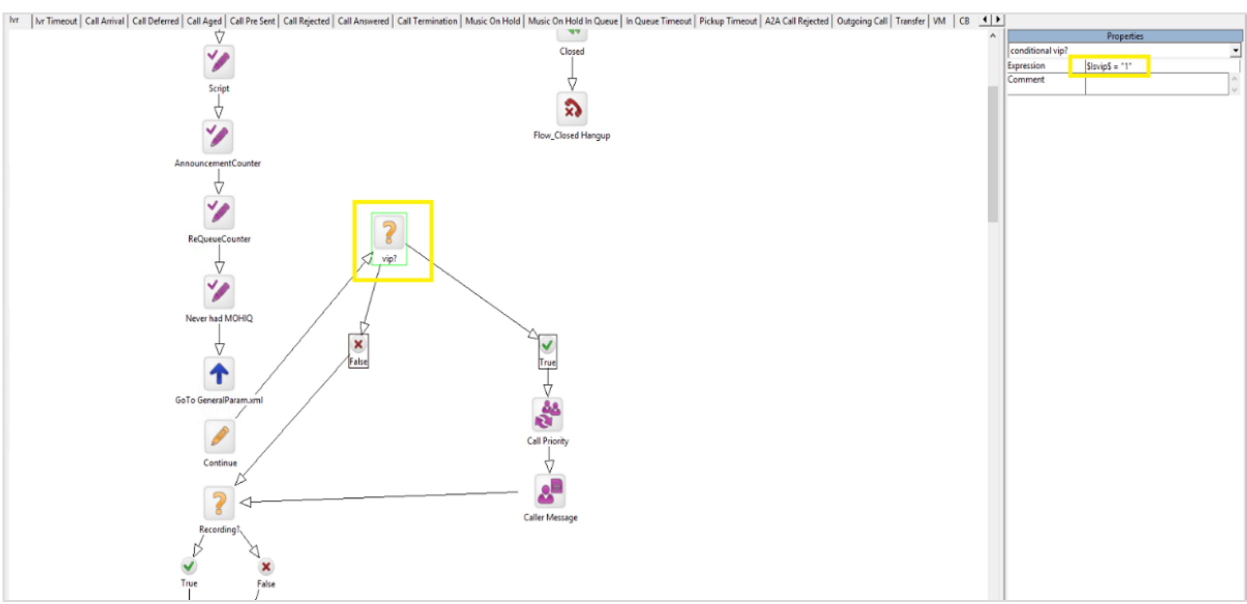
Field	Description
Table Name	**vip** – the name of the flow table (without .xml).
Key Column Name	**Key** – name of the column to search. Can also be – Value,Description
Key Column Value	**$line.ani$** - the value to search for. In this example we search for the customer's ani in the Key column.
Lookup Col.Name	**Value** – the value to return if the search value is found. In this example we insert the name of the column.

Field	Description
	Can also be – Key,Description
Lookup Col.Value	**Isvip** - the name of the result parameter.



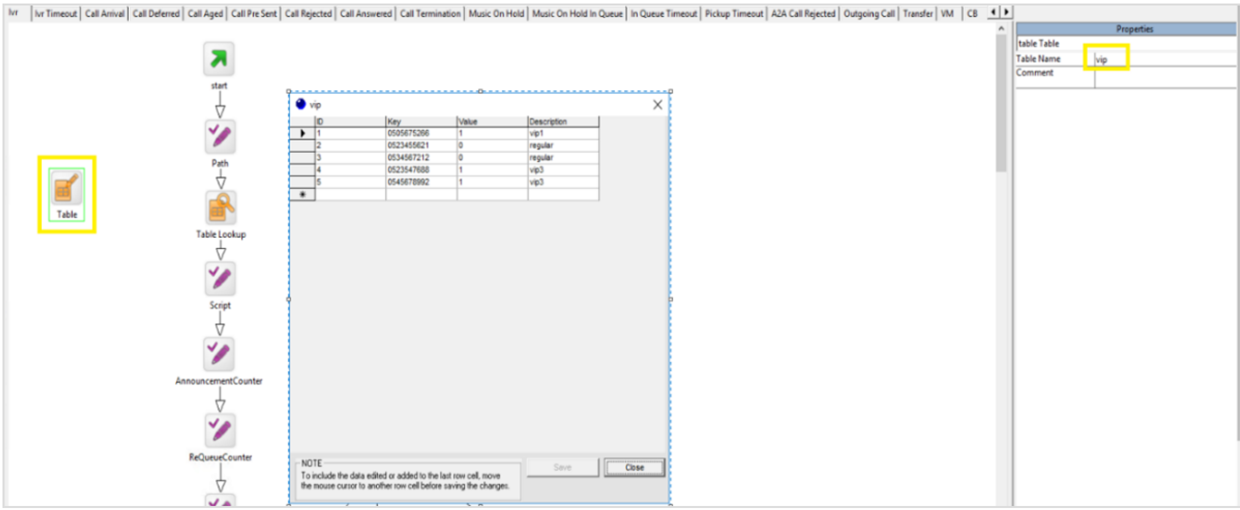
We search according to the Key column and if we find our line.ani, we return the value of Value column -> 1

3. After that, in your application you can ask about the result of your lookup and decide how to act according to the result



In this example, we use the block condition to check if our result parameter (Isvip) is equal to 1 $Isvip$ = "1":

- If True – it will set a new priority for the call, add a message to the agent that this customer is VIP, and continue with the regular flow.
- If False – it will continue with the regular flow.

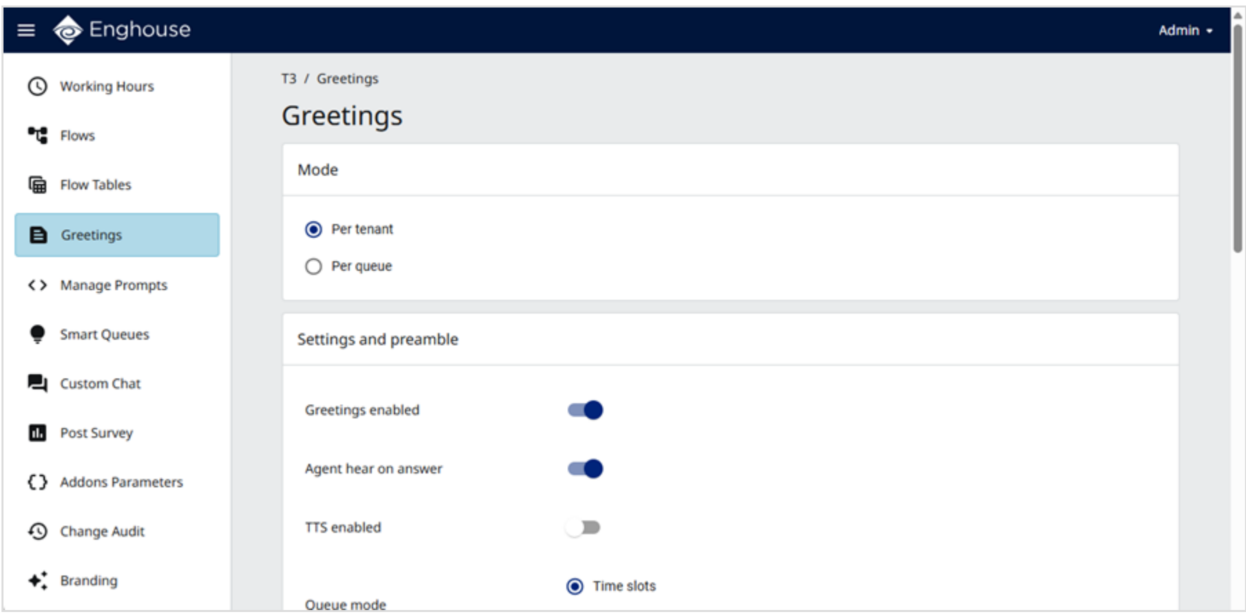


8: Greetings

This chapter contains the following information:

- Select the mode
- Configure the settings and preamble
- Manage greetings for personnel
- Record a greeting

The **Greetings** page appears as follows.



Overview

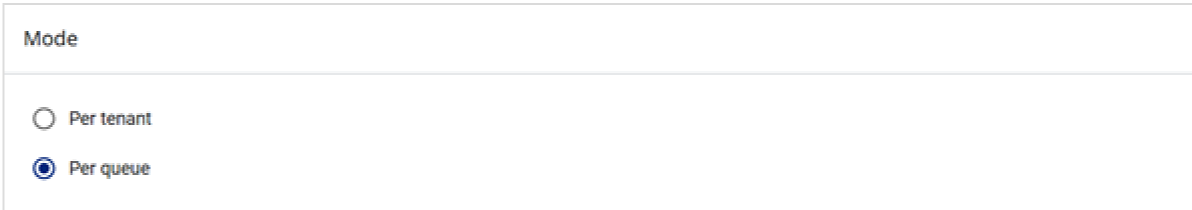
This section describes how to configure the greetings audio that is played to callers when the agent answers.

You need a Chrome browser with HTTPS to record audio. Agents can also use the AgentPersonalGreeting gadget in CCaaS UI to record the greeting.

The download icon appears when there is an available recording.

Select the mode

1. On the **Greetings** page, in the **Mode** section, select one of the following:



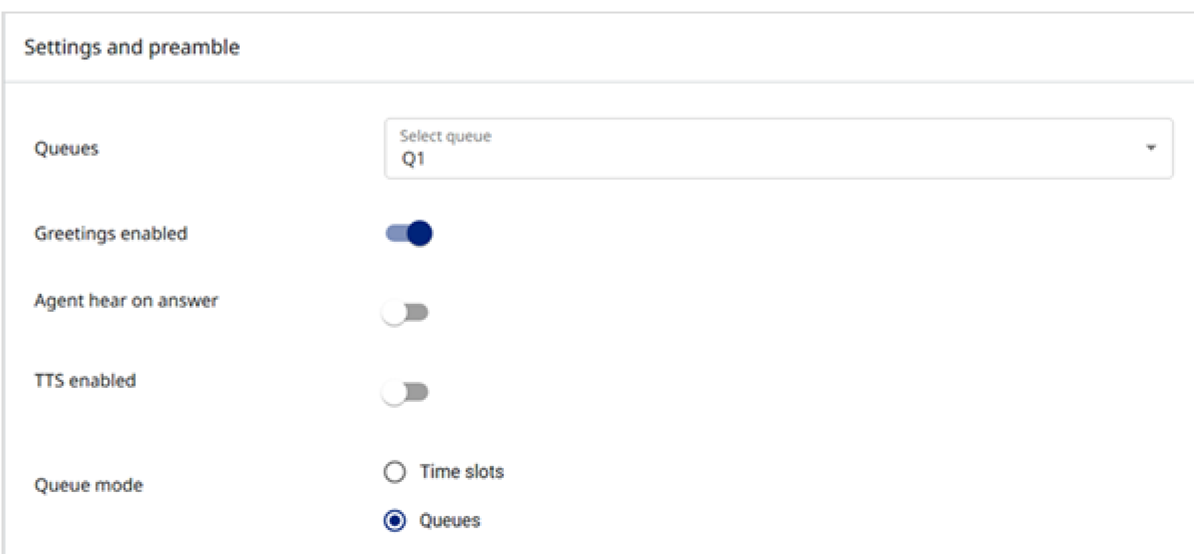
   - **Per tenant** — select if you have a simple configuration and want to play the same greeting for all queues.
   - **Per queue** — select if you want to configure each queue independently, so you can use specific wording or leave out the greeting.

Configure the settings and preamble

Use the **Settings and Preamble** section of the **Greetings** page to optionally provide a common audio that is played before the agent-specific audio, called the preamble audio.

You configure this per tenant or per queue, depending on the mode you select on the **Greetings** page. See Select the mode.

> **Note**
> If you selected the **Per tenant** mode, the **Queue ID** is always **-1** and the **Queue Name** is **All**.
> If you selected the **Per queue** mode, you need to select the queue to configure from the **Queues** list.



1. On the **Greetings** page, in the **Settings and Preamble** section, enter the following information:

    - **Queues** — if you selected the **Per queue** mode, select the queue to configure from the list.
    - **Greetings enabled** — if you do not want to play a greeting for this queue, turn off **Greetings enabled**. If you selected the **Per tenant** mode, this disables greetings functionality across the tenant.
    - **Agent hear on answer** — if you want the greeting audio heard by callers to also be heard by the agent, turn on **Agent hear on answer**.
    - **TTS enabled** — if you want to use the optional TTS service to play the greeting audio if none is recorded, turn on **TTS enabled**.

      When you turn on **TTS enabled**, the **Set language** and **Enter message** boxes appear. Enter the required information.

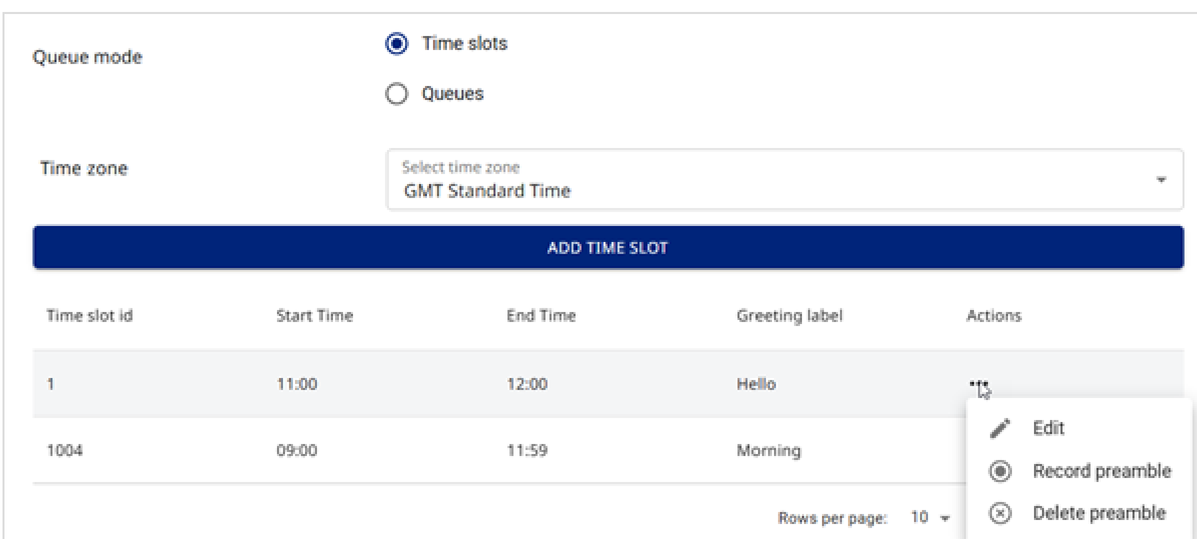
      > **Note**
      > TTS functionality is optional. Refer to the *Provisioning Portal Deployment Guide* and the TTS-specific deployment.

    - **Queue mode** - select one of the following:

        - **Time slots** — select if you want to define timespans of the day for playing different greeting audios. The **Select time zone** list, and **Add Time Slot** button appear. Continue at step 2.
        - **Queues** — select if you want to play a single recording preamble for the queue. Continue at step 3.

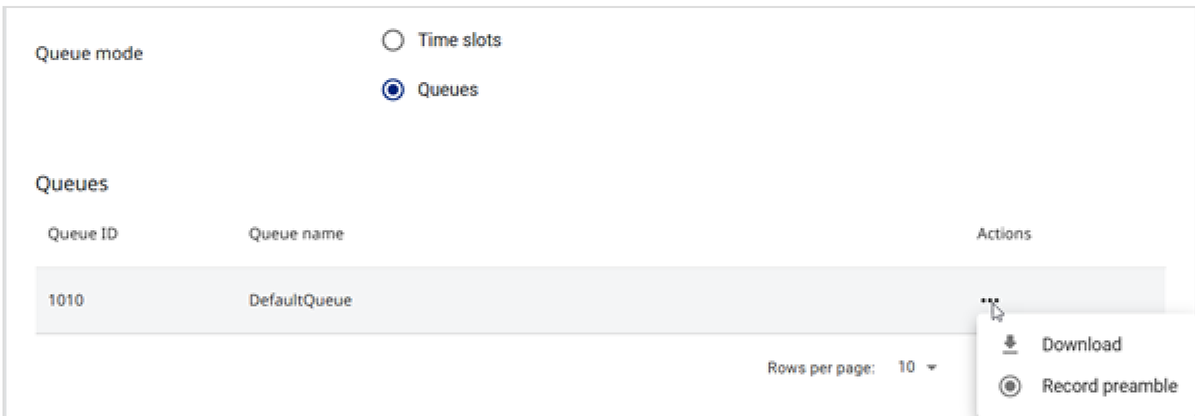
      > **Note**
      > Both modes allow an optional preamble audio. This is a common audio that is played before the agent-specific audio.
      > When using Chrome with HTTPS, you can record audio from Provisioning Portal using the record icon. Existing audio can be downloaded for review.

2. If you selected **Time slots**:



- If you need to change the **Time zone**, select the new time zone from the list.
- If you need to add another time slot, click **Add Time Slot**. See Manage timeslots below.
- In the **Timeslot** table:
  - To edit a time slot, in the time slot's row, under **Actions**, click ••• and then click **Edit**. See Manage time slots below.
  - To record a preamble for a time slot, in the time slot's row, under **Actions**, click ••• and then click **Record preamble**. See Record a greeting, from step 3.
  - To delete an existing preamble for a time slot, in the time slot's row, under **Actions**, click ••• and then click **Delete preamble**.

3. If you selected **Queues**:

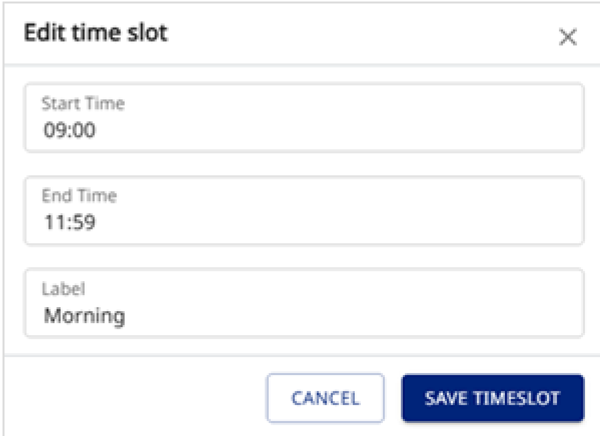


- To download an existing preamble, under **Actions**, click ••• and then click **Download**. The wave file appears in your **Downloads** folder.
- To record the preamble, under **Actions**, click ••• and then click **Record preamble**. See Record a greeting, from step 3.

Manage time slots

1. In **Time slots** mode:
   - To add a time slot, click **Add Time Slot**.
   - To edit a time slot, in the time slot's row, under **Actions**, click ••• and then click **Edit**.

   The **Add/Edit Time Slot** dialog appears.



2. Enter the following information:

   - **Start Time** and **End Time** — enter the times in the format *##:##*.
   - **Label** — enter a name for the time slot.

3. Click **Save Time Slot**.

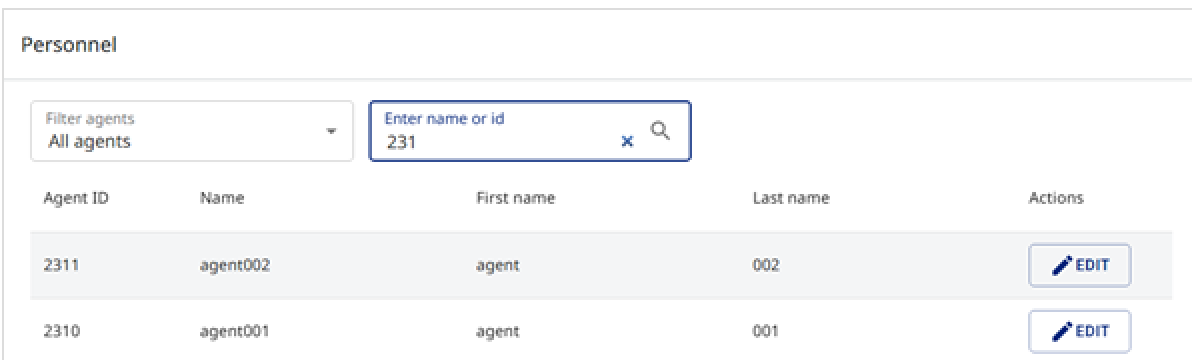
Manage greetings for personnel

Use the **Personnel** section of the **Greetings** page to manage the greetings of the agents assigned to the selected queue. These agents are in the group that has the selected queue as its primary queue.

Filter agents

In the **Filter** panel, do one or more of the following:

- To filter by recording status, select one of the following:
  - **All agents** – do not filter on whether any recordings exist
  - **With recordings** – show only agents with a recording
  - **Without recordings** – show only agents without a recording
- To filter agents by name or ID, enter text contained in the item.



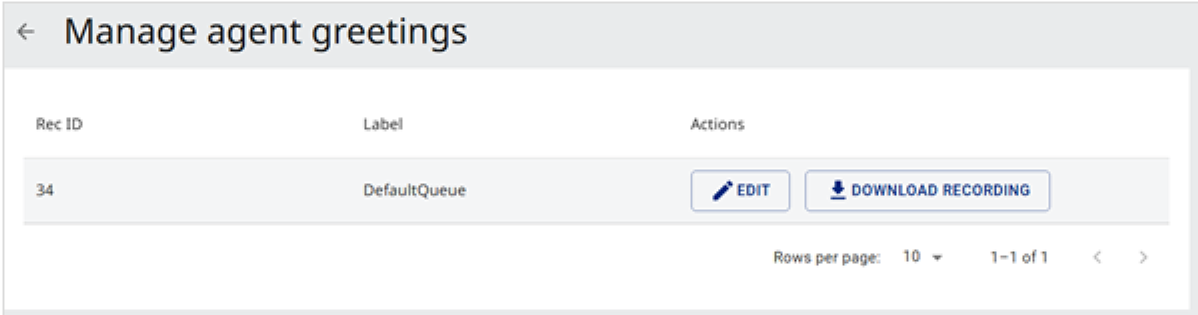
In the agents list, you can click a column heading to resort the list.

Manage greetings for an agent

1. In the agents list, click 

in the same line as the agent. The **Manage Agent Greetings** dialog appears.

   In **Queue** mode, there is a single recording.



In **Timeslot** mode, there is a recording for each timeslot.

2. To record a greeting, click 

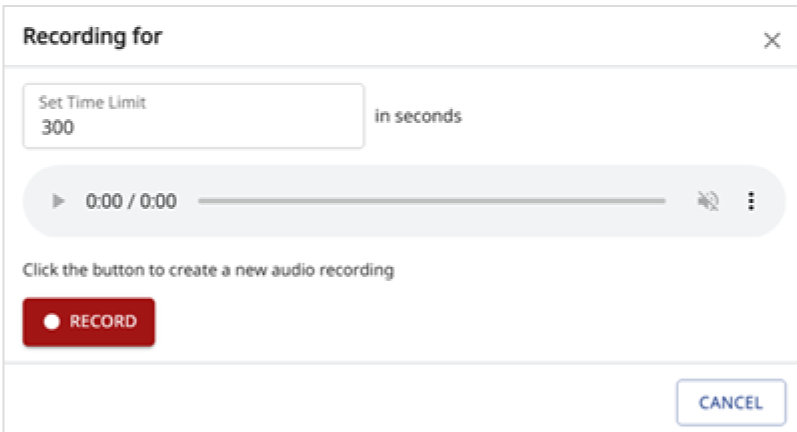
. See Record a greeting.
3. To download an existing greeting, click 

. The wave file appears in your **Downloads** folder.

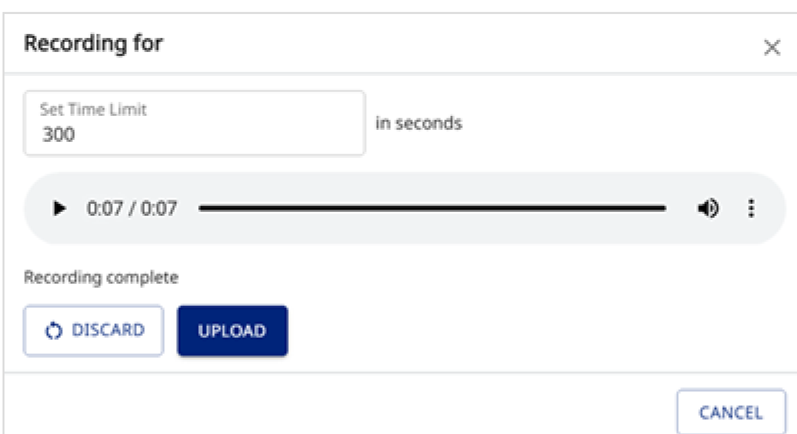
Record a greeting

Use the **Personnel** section of the **Greetings** page to record a greeting.

1. In the agents list, click  in the same line as the agent. The **Manage Agent Greetings** dialog appears.
2. Click . The **Recording For** dialog appears.



3. In **Set Time Limit**, enter the time in seconds.
4. To start the recording, click . *Recording in progress* ... appears.
5. To pause and resume the recording, click **Pause** and **Resume**.
6. To stop the recording, click **Stop**. *Recording complete* appears.

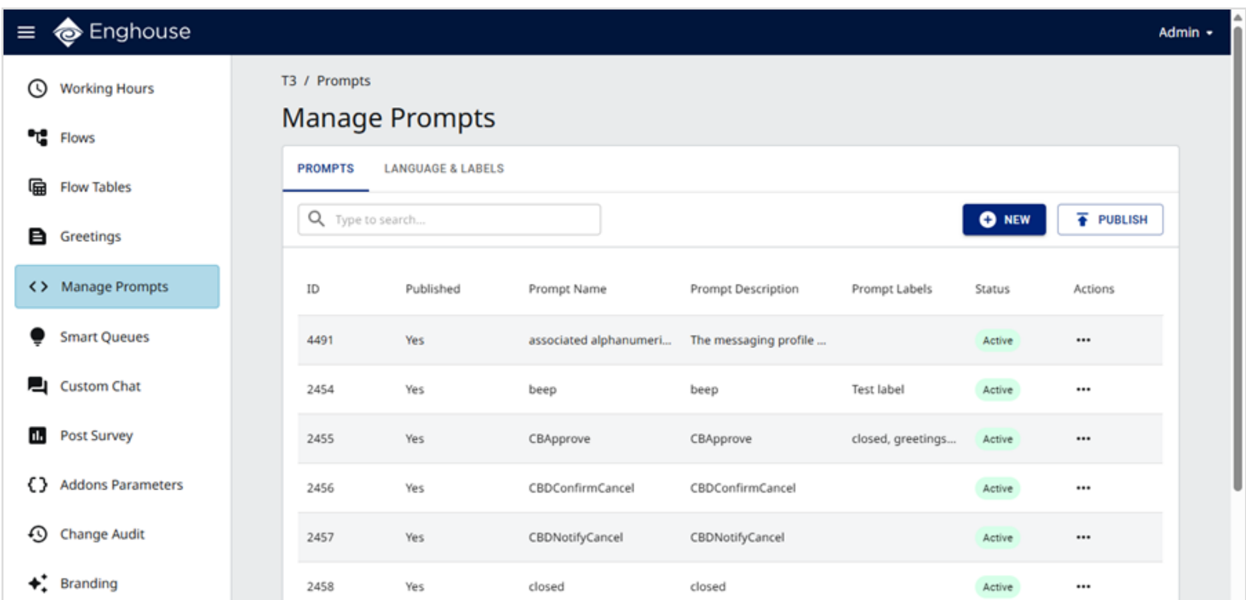


7. To play the recording, click **Play**.
8. To download the recording, click **More options** and then click **Download**. The wave file appears in your **Downloads** folder.
9. To change the playback speed, click **More options** and then click **Playback speed**. Select the speed in the list.
10. To upload the file, click **Upload**.

9: Manage prompts

This chapter contains the following information:

The **Manage Prompts** page appears as follows.



Overview

This section describes how to manage the audio prompts that are referenced in the Flows and Queues modules.

Prompts is a voice prompt library. To define a prompt, enter the prompt name and then upload a relevant audio file per language. Language is a customizable attribute to the tenant. A tenant administrator can decide to support one or more languages in their IVR service.

Once languages are defined, relevant audio files for prompts in each language may then be uploaded and published. Uploading process concerns putting the audio files in the system repository while publishing process concerns taking the audio files from the repository to the web farm (IIS instances).

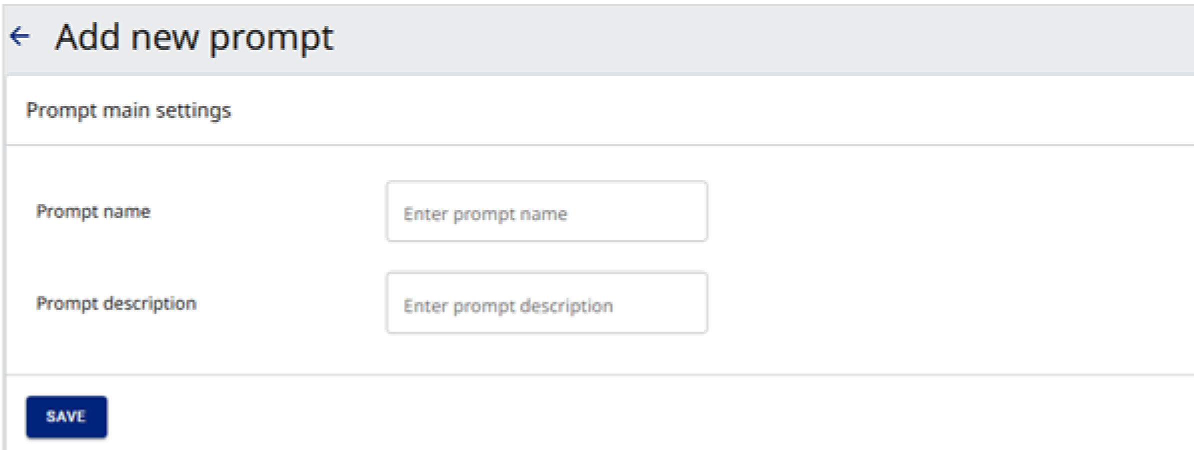
Once a prompt is defined, it may be assigned to relevant parts in the Flows module and Smart Queues module.

The Prompt library may be used as a standalone module for advanced developers.

Add a new prompt

1. On the **Manage Prompts** page, on the **Prompts** tab, click 

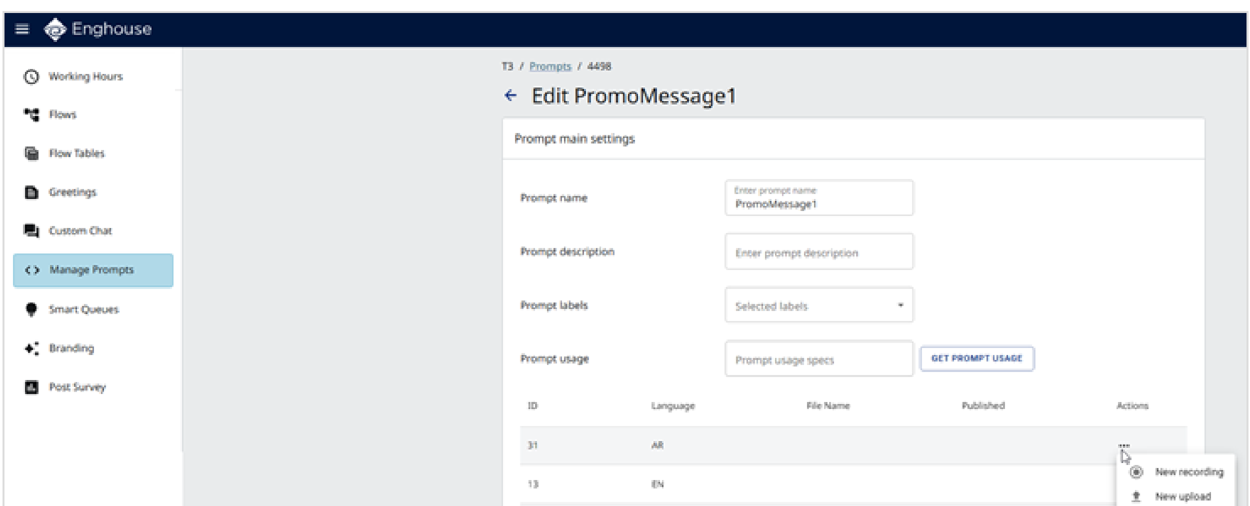
. The **Add New Prompt** dialog appears.



2. Enter the **Prompt name** and **Prompt description**.

> **Note**
> The prompt name must be unique per tenant. If you attempt to reuse a prompt name, the *Adding Prompt Failed* message appears.

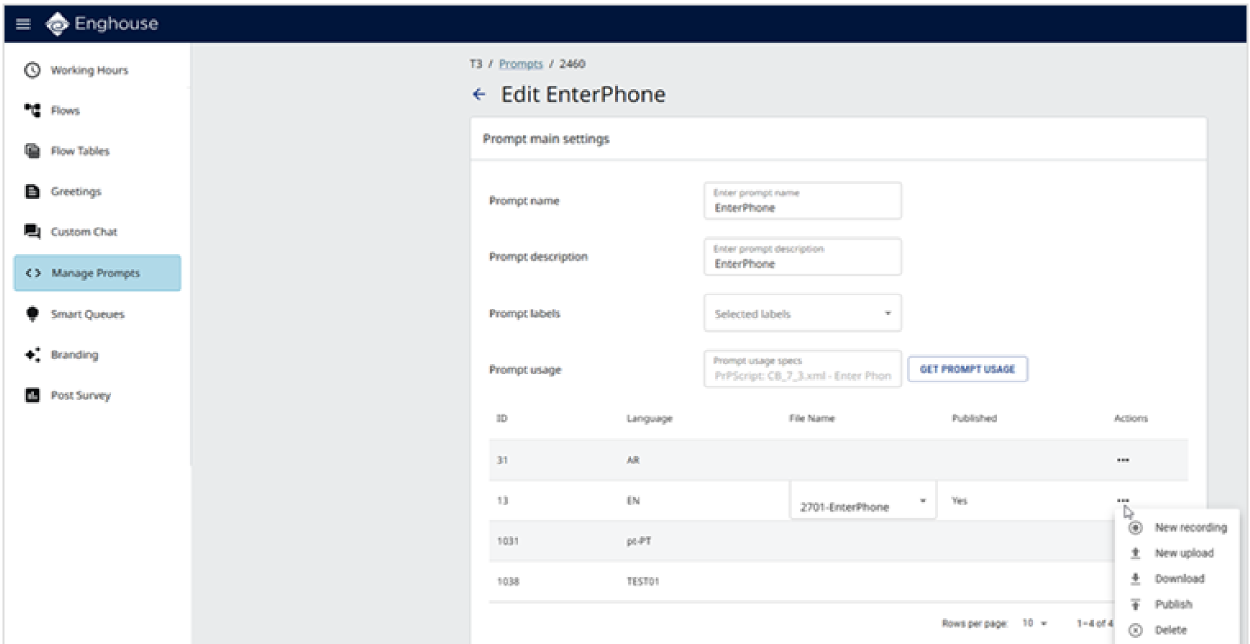
3. Click **Save**. The **Edit [prompt name]** dialog appears.



4. To record an audio file, in the language's row, under **Actions**, click ••• and then click **New recording**. For details, see Add a new recording.
5. To upload an audio file, in the language's row, under **Actions**, click ••• and then click **New upload**. For details, see Upload an audio file.

Edit a prompt

1. On the **Manage Prompts** page, on the **Prompts** tab, in the prompt's row, under **Actions**, click ••• and then click **Edit**.
2. The **Edit [prompt name]** dialog appears.

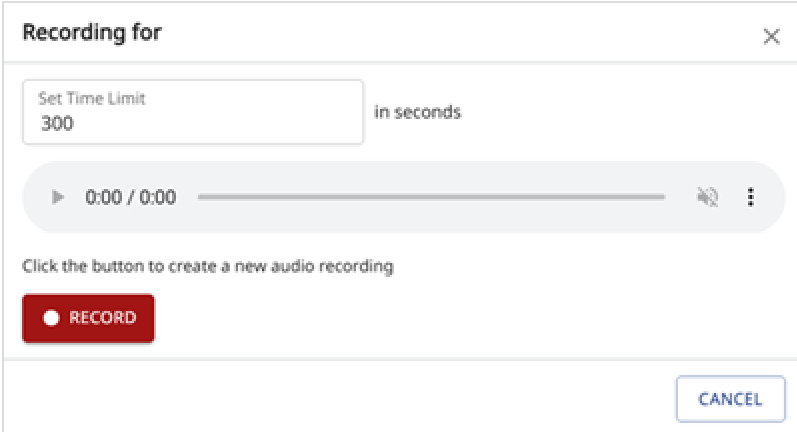


From here, you can:

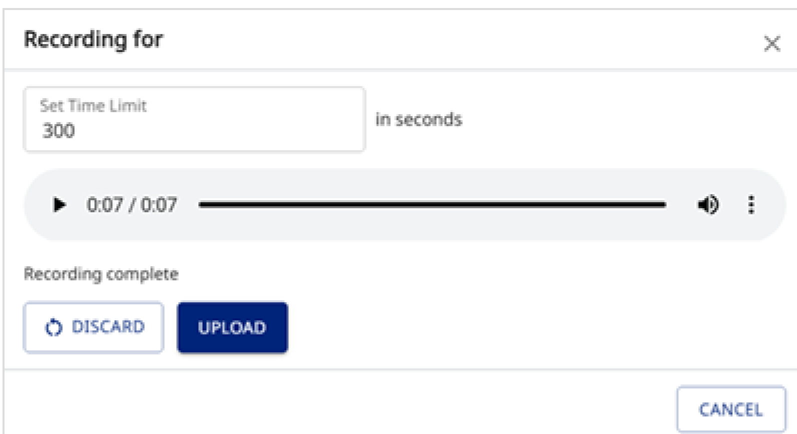
- Rename the prompt and change the description, by clicking in the **Prompt name** box or **Prompt description** box.
- Label the prompt, by selecting a label in the **Prompt labels** list.
- Get prompt usage, by clicking the **Get Prompt Usage** button.
- Add a new recording
- Upload an audio file
- Download an audio file
- Publish an audio file
- Delete an audio file

Add a new recording

1. In the language's row, under **Actions**, click ••• and then click **New recording**. The **Recording For** dialog appears.



2. In **Set Time Limit**, enter the time in seconds.
3. To start the recording, click RECORD. *Recording in progress* ... appears.
4. To pause and resume the recording, click **Pause** and **Resume**.
5. To stop the recording, click **Stop**. *Recording complete* appears.

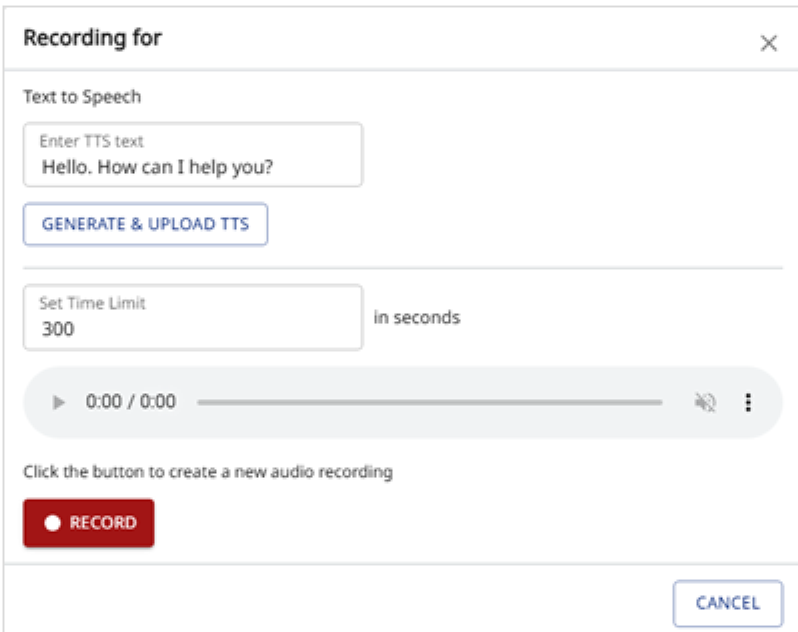


6. To play the recording, click **Play**.
7. To download the recording, click **More options** and then click **Download**. The *.wav* file appears in your **Downloads** folder.
8. To change the playback speed, click **More options** and then click **Playback speed**. Select the speed in the list.
9. To upload the file, click **Upload**. The audio file appears in the **File Name** list.

Text to Speech

> **Note**
>
> Text to Speech (TTS) functionality is optional. Refer to the *Provisioning Portal Deployment Guide* and the TTS-specific deployment. TTS utilizes different AI cloud vendors (supported by Enghouse - Microsoft, IBM and Google) each having their own charges.

1. If Text to Speech is installed and enabled for your tenant and language, the **Recording For** dialog appears as follows.



2. In **Enter TTS text**, enter the text for the prompt.
3. Click **Generate & Upload TTS** to generate the text as an audio file and upload it to the server.

Upload an audio file

> **Note**
>
> You can upload multiple audio files per language per prompt.

1. In the language's row, under **Actions**, click ••• and then click **New upload**. The file selection dialog appears.
2. Select the audio file and click **Open.** The audio **File Name** list is updated.

> **Note**
>
> - Provisioning Portal supports two audio file formats: mp3 and wav. Part of the upload process converts the file to the CCaaS-supported audio file PCM 8KHz 16-bit Mono.

- Uploading stores audio files in the system repository. Follow the next step (publish) to bring uploaded audio files online on the web farm (IIS instances)
- The value of the PublishPromptFolder key is configured in the ProvisioningPortal *web.config* file:

```
<add key="PublishPromptFolder"
value="\\{FQDN}\IVRScripts\{tenantId}\Wavs\{lng}\" />
```

Download an audio file

1. In the language's row:
   a. Under **File Name**, select the file.
   b. Under **Actions**, click ••• and then click **Download**.
2. The wave file appears in your **Downloads** folder.
3. Use any audio player that supports wave audio file format to play back the audio file.

Publish an audio file

Caution
Publish does not prompt for confirmation. It immediately brings an audio file from the system repository online.

1. In the language's row:
   a. Under **File Name**, select the file.
   b. Under **Actions**, click ••• and then click **Publish**.
2. In the **Published** column, the status changes to **Yes**.

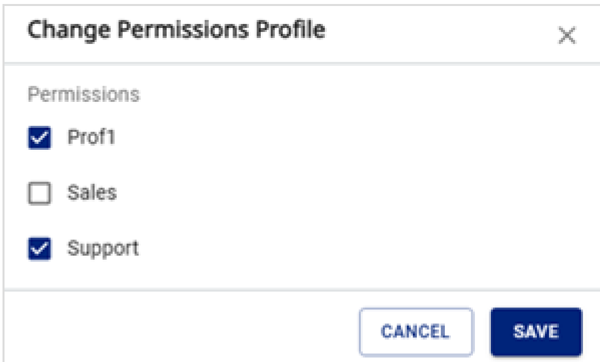
Delete an audio file

1. In the language's row:
   a. Under **File Name**, select the file.
   b. Under **Actions**, click ••• and then click **Delete**.
2. In the **Delete Prompt** dialog, click **Delete**.

Change prompts permissions profile

To authorize regular supervisors to make changes:

1. On the **Manage Prompts** page, select the application in the **Application** list.
2. Point to the prompt name and then click **Permission Profiles Prompt** in the same line. The **Permission Profiles** dialog appears.



3. Select the permission profiles in the list.
4. Click **Save.**

Deactivate or activate a prompt

Deactivate a prompt

1. On the **Manage Prompts** page, select the **Prompts** tab.
2. In the prompt's row, under **Actions**, click ••• and then click ⊗ **Deactivate**.
3. In the **Deactivate Prompt** dialog, click **Deactivate**. In the **Status** column, the status changes to **Inactive**.

Activate a prompt

1. In the prompt's row, under **Actions**, click ••• and then click ✓ **Activate**.
2. In the **Activate Prompt** dialog, click **Activate**. In the **Status** column, the status changes to **Active**.

Publish prompts

1. On the **Manage Prompts** page, do one of the following:

   To publish all prompts:

   a. Click PUBLISH.
   b. In the **Publish Prompts** dialog, click **Publish**.

   To publish an individual prompt, see Publish an audio file.

Edit languages and labels

Caution

Prompt languages are fully customizable by the tenant, however the language codes defined by the service provider should not be removed.

Note

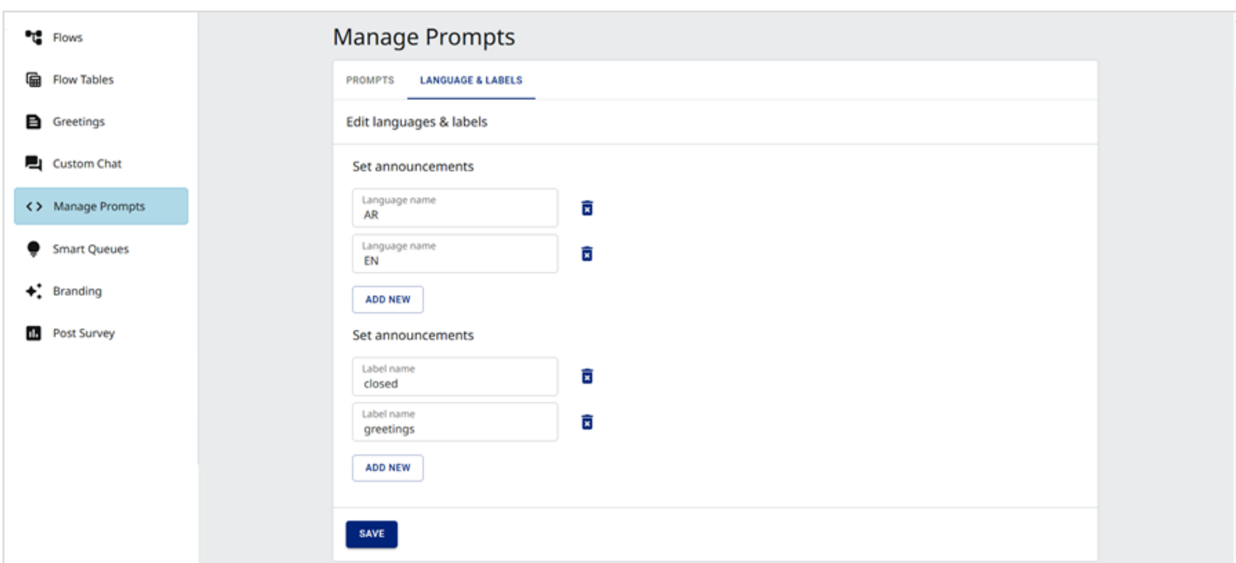
You can delete a language code only if there are no audio files associated with it. After an audio file is associated in a prompt with a language code, the language code cannot be deleted, even if the associated prompts are successfully removed. This is because deleted prompts are marked inactive instead of being actually removed from the Provisioning Portal database.

If you want to delete unwanted languages, prompts, and audio files, contact Enghouse Interactive Support.

The default language codes are En (for English) and Sp (for Spanish). The language code En is referenced for playing any audio files before the caller had made a language selection in the IVR. By default the caller is prompted for language selection through the Menu_Lang placeholder in the Flows module.

Labels help organize prompts. Each prompt can be associated with zero or more labels.

1. On the **Manage Prompts** page, click the **Languages & Labels** tab**.**
2. The **Edit Languages & Labels** dialog appears.



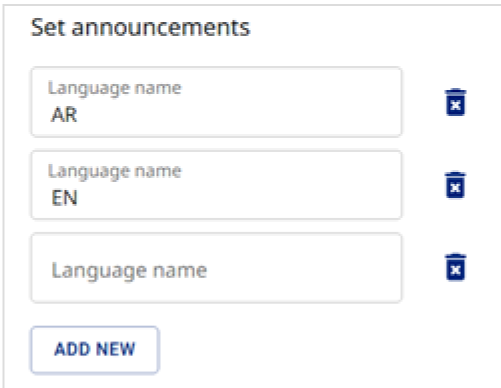
From here, you can:

- Edit a language or label, by clicking in the **Language name** box or **Label name** box.
- Add a new language or label.
- Delete a language or label, by clicking the corresponding .

3. To return to the **Prompts** tab, click **Save**.

Add a new language or label

1. Click **Add New** at the bottom of the language or label section. An empty box appears at the bottom of that section.



2. Enter the new language name or label name.
3. Click **Save**.

Integrate the Prompts module with Designer (for advanced developers)

The Prompts module can be used with an existing or a new IVR application flow. Customers can develop the full IVR flow using Designer and reuse the Prompts module for assigning prompts from the Library. This enables tenants to use the Provisioning Portal GUI to manage prompts and creates structured prompt management.

To do this:

1. Create **Wavs** folder for the tenant under the DFS root folder for Provisioning Portal
    a. Create the tenant folder under the Provisioning Portal scripts root DFS folder, for example, *D:\IVRScripts\{tenant ID}*
    b. Create *Wavs* folder under the new tenant folder, for example, *D:\IVRScripts\{tenant ID}\Wavs*
2. Create **Prompts** for the tenant
    a. Log on to the Provisioning Portal Web Portal as a tenant administrator
    b. Switch to the Prompts module
    c. Define the desired Languages, for example, En
    d. Define Prompts for the library, upload, and publish audio files as usual
3. Adjust the desired Designer apps to play back audio files using the Prompts library
    a. Set up **Wavs** optional parameter – add an Optional Parameter block in the IVR event Designer script before any Designer blocks that play back audio files

Parameter Name	Wavs
Parameter Value	For example: *http://scripts.lab.enghouse.loc/IVRScripts/$calldata.tenantid$/Wavs/*

    b. Set up **Lang** optional parameter - add an Optional Parameter block in the IVR event Designer script before any Designer blocks that play back audio files

Parameter Name	Lang
Parameter Value	For example: En

    c. Replace audio file value of any blocks that play back audio files (such as PlayAudio blocks), for example:

    § $calldata.option("Wavs")$$calldata.option("Lang")$/SamplePrompt.wav

    d. Optionally, relocate the desired Designer apps to the *DFS* folder, for example, *D:\IVRScripts\{tenant ID}\{Designer App folder}*

Recording Prompts IVR application

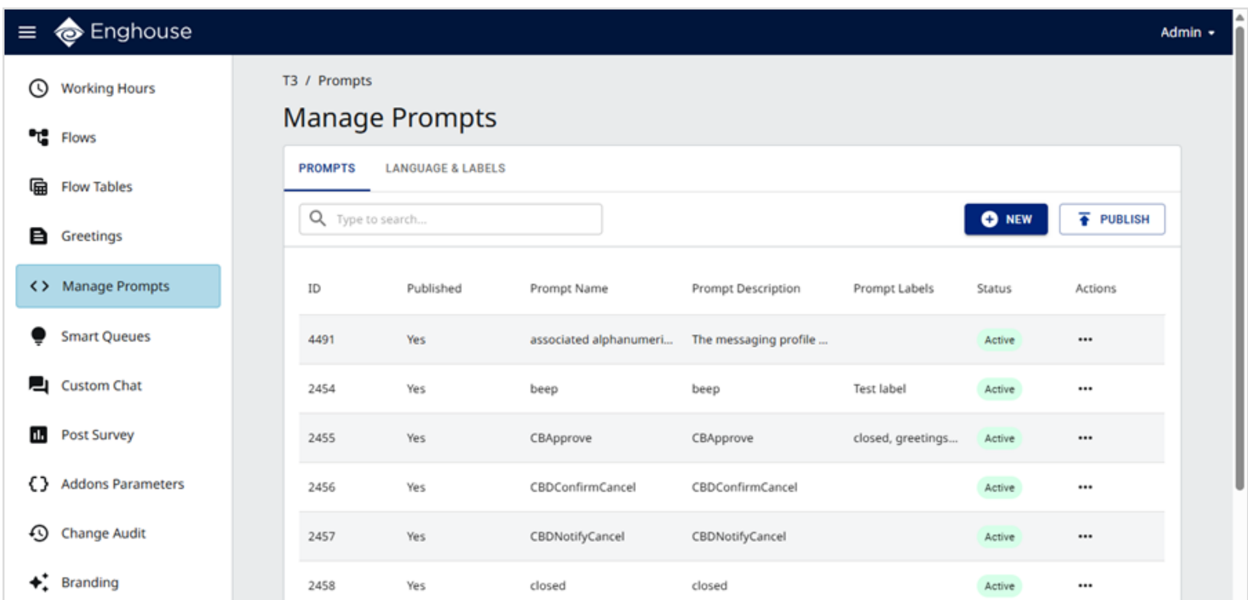
The Provisioning Portal Helper's **Recording Prompts** application is an IVR application that enables you to:

- Replace an existing prompt by recording a new prompt and overwriting the existing one.
- Add a new prompt
- Select a prompt from existing list
- Deactivate a prompt using a silent wav file

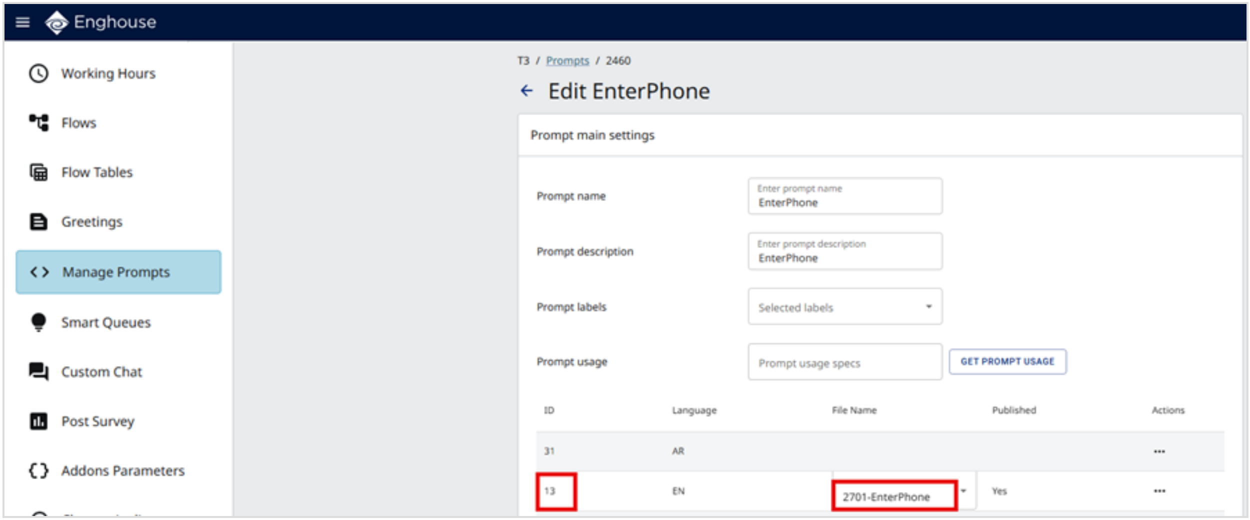
The files are published to the *wavs\language* folder.

To use this application, you need to provide the following details:

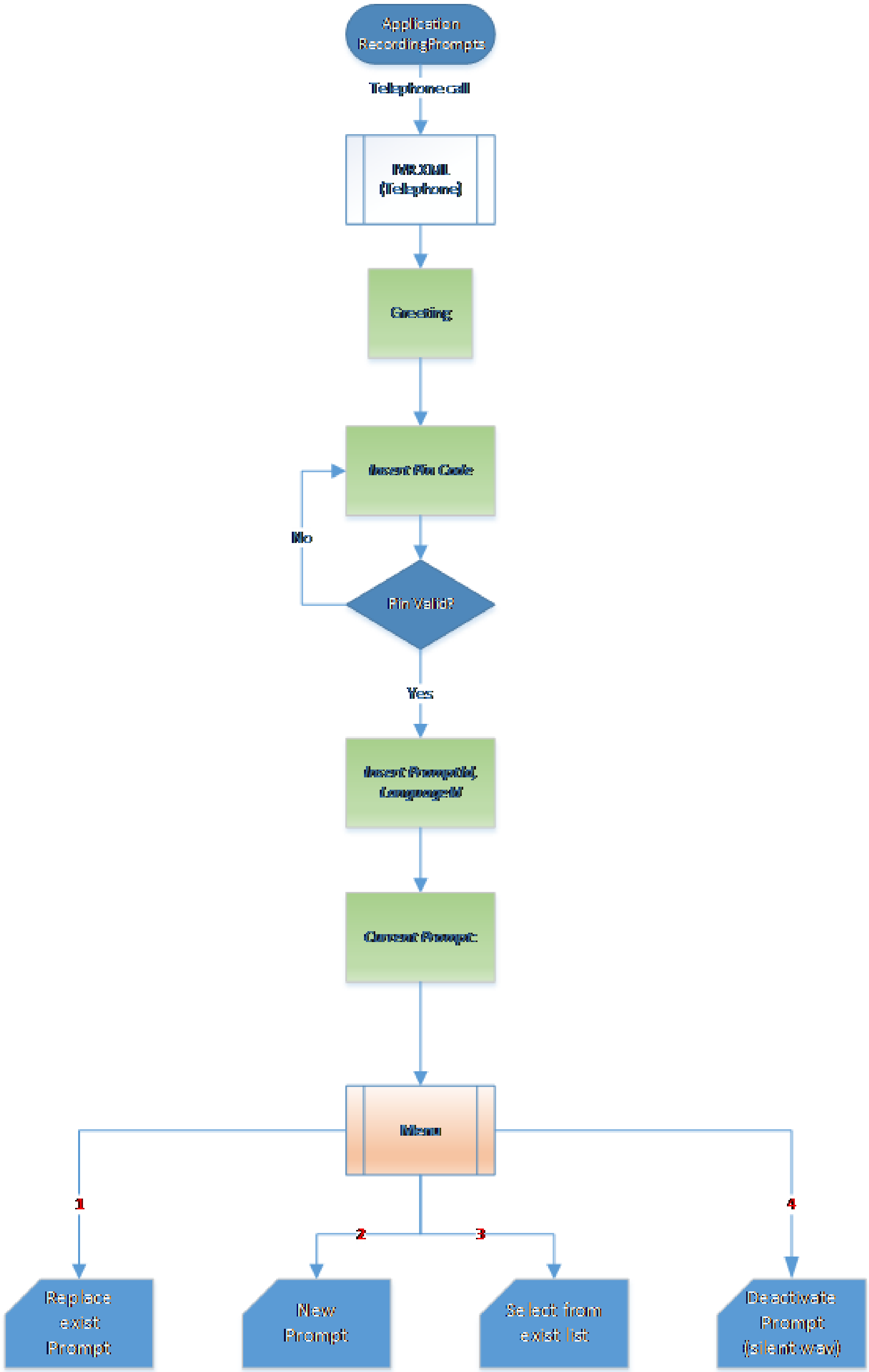
- **Pin code** provided by the landlord that configured this application for you
- **Prompt ID** found in the ID column



- **Language ID** and **File ID**, if you want to select an existing file



The **Recording Prompts** application flow is as follows.

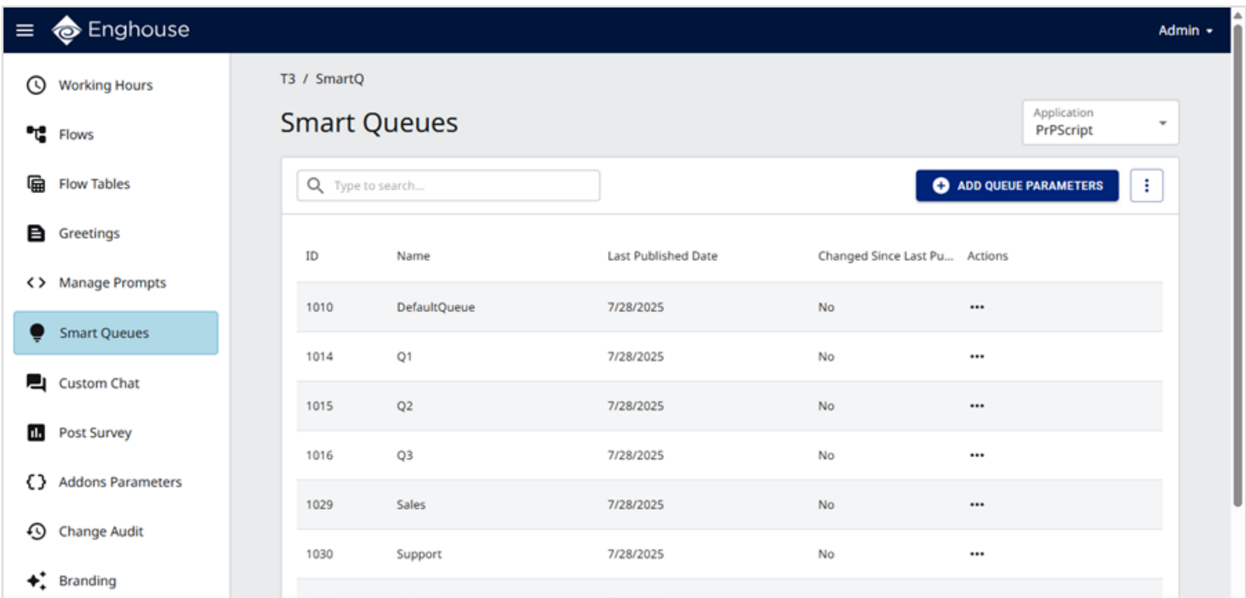

Application
RecordingPrompts
Telephone call
IVR Call
(Telephone)
Greeting
Insert Pin Code
No
Pin Valid?
Yes
Insert PromptId,
LanguageId
Current Prompt
Menu
1
2
3
4
Replace
exist
Prompt
New
Prompt
Select from
exist list
Deactivate
Prompt
(silent wav)

10: Smart Queues

This chapter contains the following information:

- Edit and publish general parameters for Smart Queues
- Add queue parameters
- Edit a queue
- Publish queues

The **Smart Queues** page appears as follows.



Overview

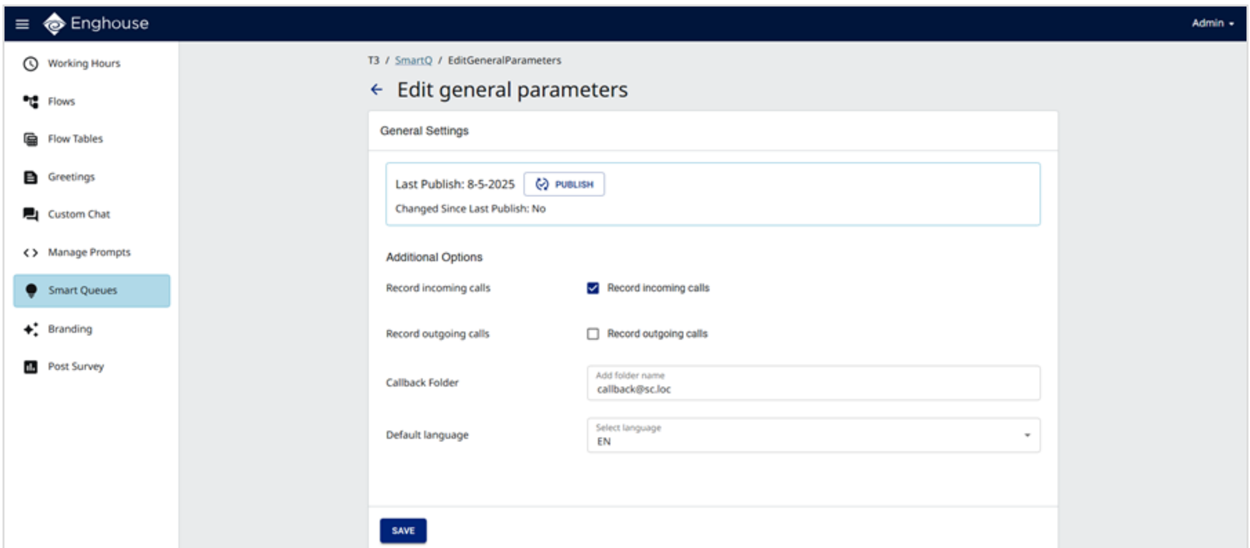
Smart Queues enables state-of-the-art contact center features that can be dynamically adjusted by supervisors.

This section describes how to configure general Smart Queues parameters and conditional treatments for calls in queues.

> **Note**
> Music treatment for calls in queue is automatic and does not require specific Smart Queues configuration.

Edit and publish general parameters for Smart Queues

1. On the **Smart Queues** page, select the application in the **Application** list.
2. Click and then click **Edit general parameters**. The **Edit General Parameters** dialog appears.



2. Under **Additional Options**, enter the following information:
   - **Record incoming calls** — if all incoming voice calls should be recorded, select the check box.
   - **Record outgoing calls** — if all outgoing voice calls should be recorded, select the check box.
   - **Callback folder** (optional) — enter the the tenant identity for receiving callback requests, in the format *Callback@YourUPNsuffix*, for example, *callback@sc.loc*

     > **Note**
     >
     > - *Callback* refers to a system folder created automatically for your tenant. Do not change this name.
     > - You may find the UPN suffix value in the system-generated subscription confirmation email.

   - **Default language** — select the language.
3. To activate the changes, click 

Publish.
4. In the **Publish General Parameters** dialog, click **Publish.**
5. Click **Save**.

Add queue parameters

Note

When all queues have been declared for Smart Queues, the **Select Queue** dialog does not open.

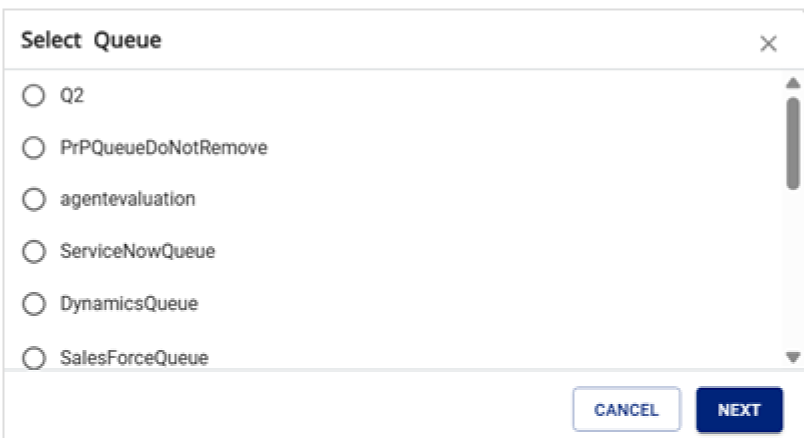
Caution

Although you can change a queue's name on the Queues page in the Admin module, after a queue has been added in Smart Queues, the name change is not reflected in Smart Queues. This is a known limitation. You must re-add the updated queue name in Smart Queues and redo the relevant Smart Queues configurations for the updated queue name.

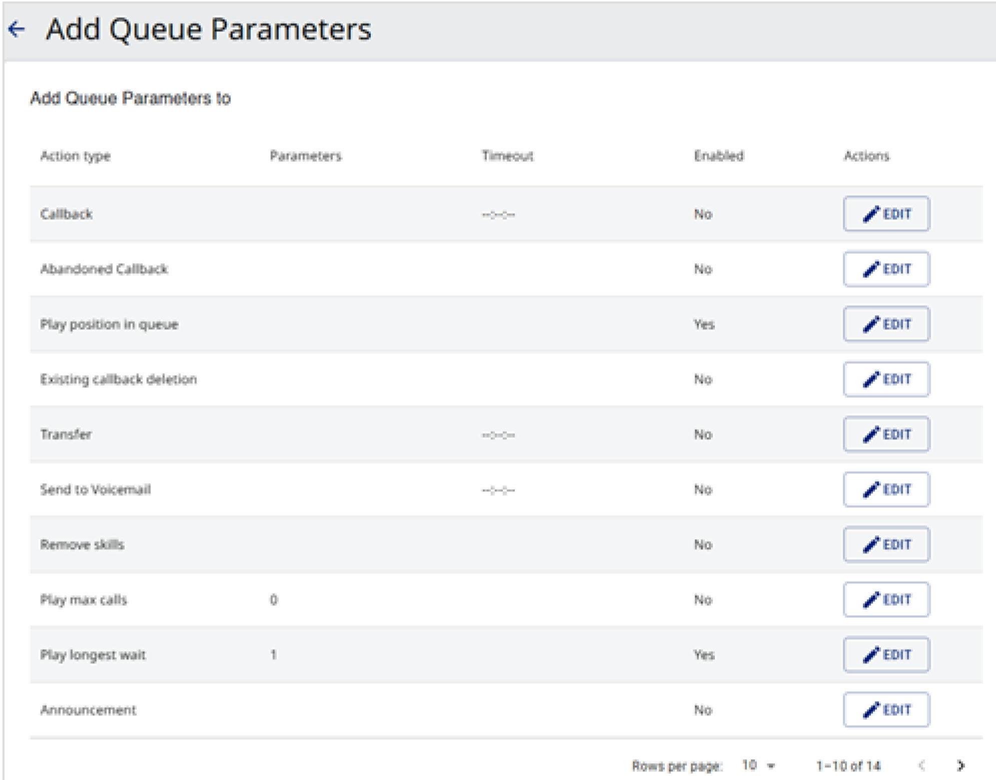
In addition, you must replace references to the old queue name with the updated queue name in Flows and Smart Queues. For example, replace the value of the optionalParameter action type called QueueName = Sales with the updated queue name, and replace the value of Callback Queue Name for Callback action type of Smart Queues parameters with the update queue name. This applies to both the standard and custom templates. The queues affected in the standard templates are Support and Sales.

1. On the **Smart Queues** page, select the application in the **Application** list.
2. Click 

. The **Select Queue** dialog appears.



3. Select a queue and click **Next**.
4. The **Add Queues Parameters** dialog appears.

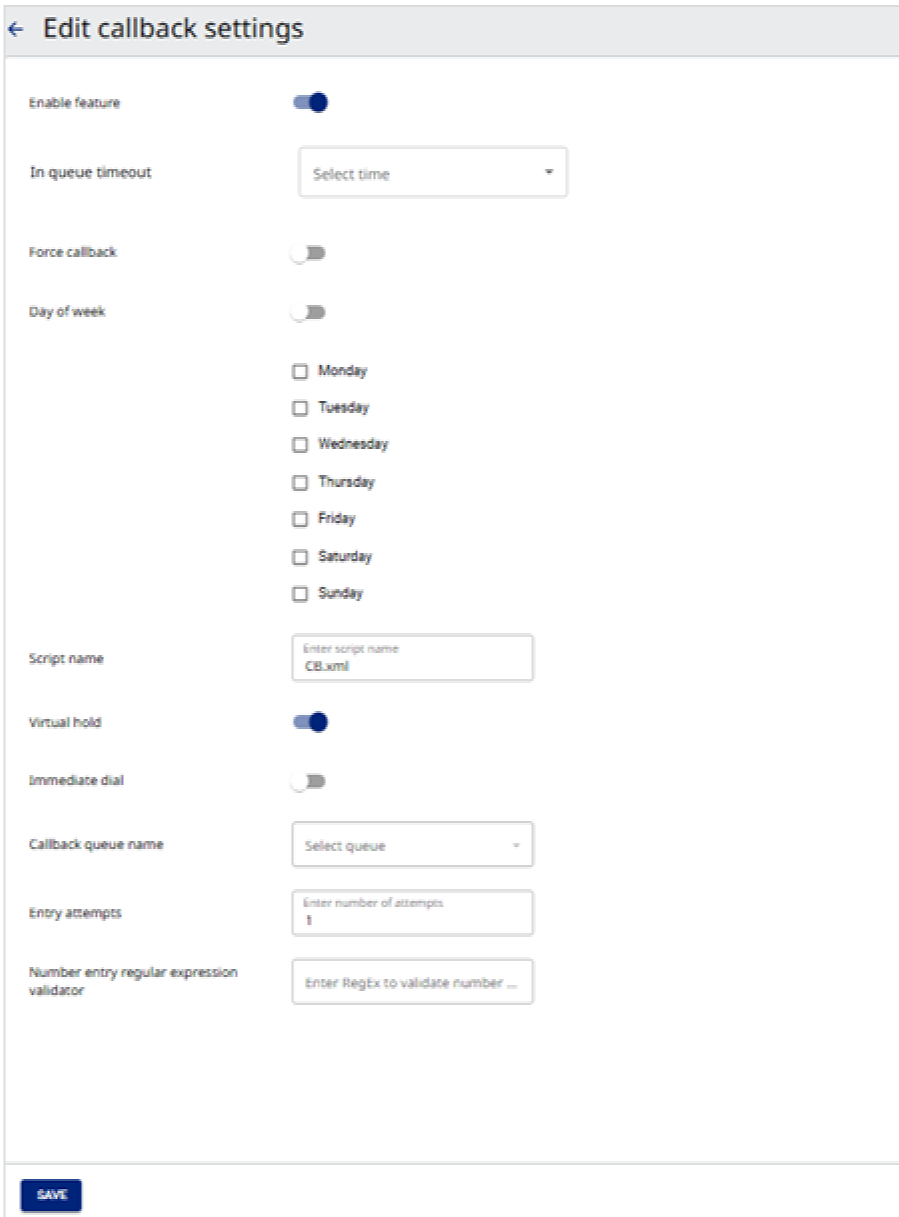


5. Configure the action-type parameters as described in the following topics:

   - Callback
   - Abandoned Callback
   - Play Position in Queue
   - Existing Callback Deletion
   - Transfer
   - Send to Voicemail
   - Remove Skill
   - Play Max Calls
   - Play Longest Wait
   - Announcements
   - No Agents Available
   - Record Queue
   - VIP Routing
   - SMS

Callback

1. In the **Add Queue Parameters** dialog, in the **Callback** row, click . The **Edit Callback Settings** dialog appears.
2. Turn on **Enable feature**.



3. Enter the following information:

   ◦ **Select in queue timeout** — select the in queue time after which the callback option should be offered to the customer.

Note

When a specific **In queue timeout** is chosen for callback:

- The callback option is offered to the caller *every* In queue timeout period.
- For the Transfer and Send to Voicemail actions, the selected **In queue timeout** value is unavailable.

  - **Force callback** — to force the caller to leave a callback request, turn on.
  - **Day of week** — to offer a callback only on specific days of the week, turn on and select the days.
  - **Script name — do not change.**

Caution

Do not change the **Script name**. This field is designed for the service provider to customize the callback flow.

  - **Virtual hold** — to queue the callback with respect to the customer's current position in the queue, turn on. When this option is turned on, the callback request stays in the same queue. For more information, see the note at the end of this topic.
  - **Immediate dial** — to enable the callback to immediately dial from the agent, turn on**.**
  - **Callback queue name** — select the queue in which to queue the callback. When **Virtual hold** is turned on, the system ignores this selection.
  - **Entry attempts** — enter the number of attempts the caller is permitted to enter a callback number that passed the **Number entry regular expression validator.**
  - **Number entry regular expression validator** — enter the regular expression to validate the number entry.

Note

The **Number entry regular expression validator** provides a mechanism to restrict callback numbers to specific formats using the well-document Regular Expression syntax (it requires the "RegExTest" function added to XMLInterpreter).

For example: "^0(0972)?([1-9]([0-9]{7})([0-9])?)$" is for Israel local and international numbers. It allows local numbers of 8-9 digits starting with 0 (but not 00), and international numbers starting with 00 that are 12-13 digits (but the 6th digit may not be 0). In this example, permitted numbers are: 012345678, 0223456789, 0097212345678, 00972223456789.

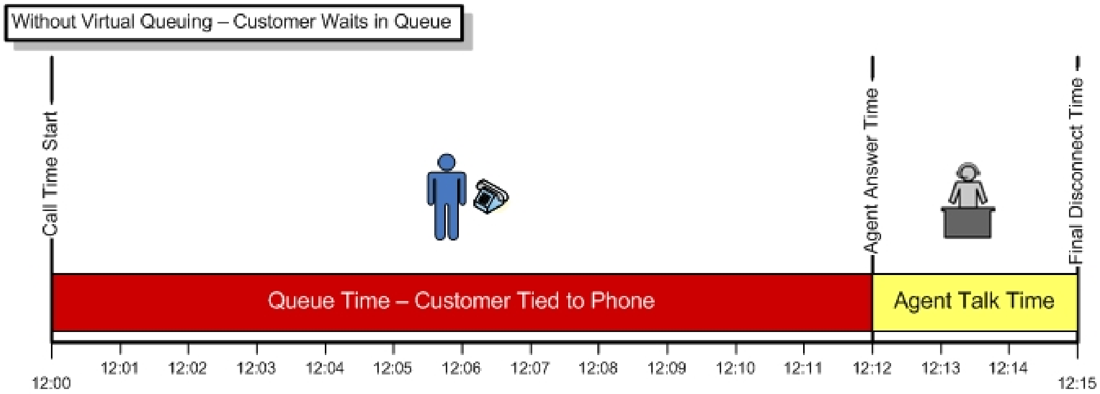
An online tool that is useful to test these expressions is https://regex101.com/.

4. Click **Save.**

Note

The primary function of **Virtual hold** is to offer callers the option to save their "place in line". When it's their turn in the queue, the virtual (phantom) call connected to the available agent and the caller receives a call from the system.

This allows the caller to do something productive while waiting for an agent to become available. Also, when the caller finally reaches an agent they are not frustrated about being on hold for an extended period and agents are less stressed by irate callers. Virtual hold can be easily used in smartphone applications.



The primary function of **callback** is to offer callers the option to schedule a call for an appropriate time by caller's selection or by contact center business rule. For example, to handle the callback calls only when agents are idle to flatten out the call center's busy time.

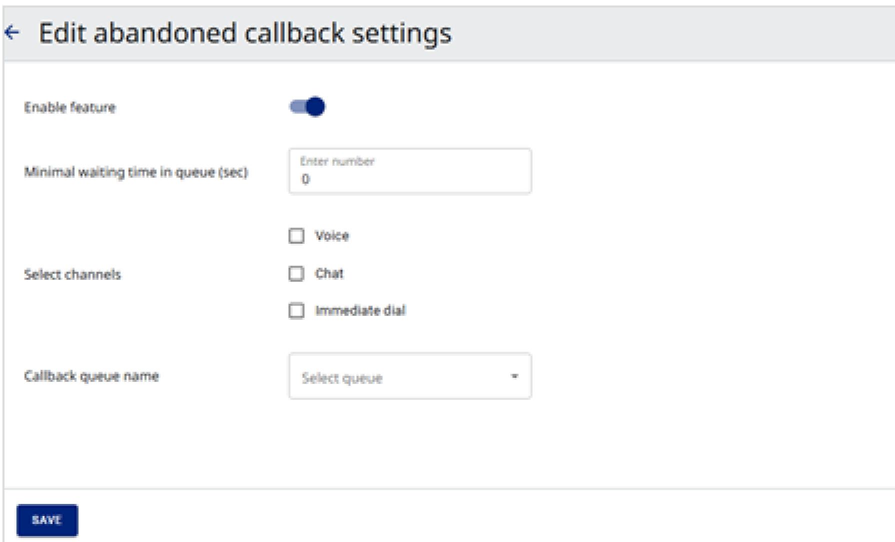
There is a business need to automatically activate the different functions of callback or virtual hold by defined business rules or by supervisor intervention based on the call center's current ability to handle callbacks and virtual holds.

Abandoned Callback

> **Note**
> The callback script is set in the Callback parameters. See Configure Callback.

1. In the **Add Queue Parameters** dialog, in the **Abandoned Callback** row, click 

. The **Edit Abandoned Callback Settings** dialog appears.
2. Turn on **Enable feature**.



3. Enter the following information:
   - **Minimal waiting time in queue (sec)** — enter the threshold for automatically creating a callback when a call is abandoned in-queue . Calls abandoned sooner than this threshold do not have a callback created. To always create a callback when a call is terminated in-queue, enter 0.
   - **Select channels** — select one or more of the following:
     - **Voice** — to automatically create a callback for abandoned voice calls, select the check box.
     - **Chat** — to automatically create a callback for abandoned chat calls, select the check box.

       > **Note**
       > The callback number must be set in the "ACBChatOPNumber" optional parameter.

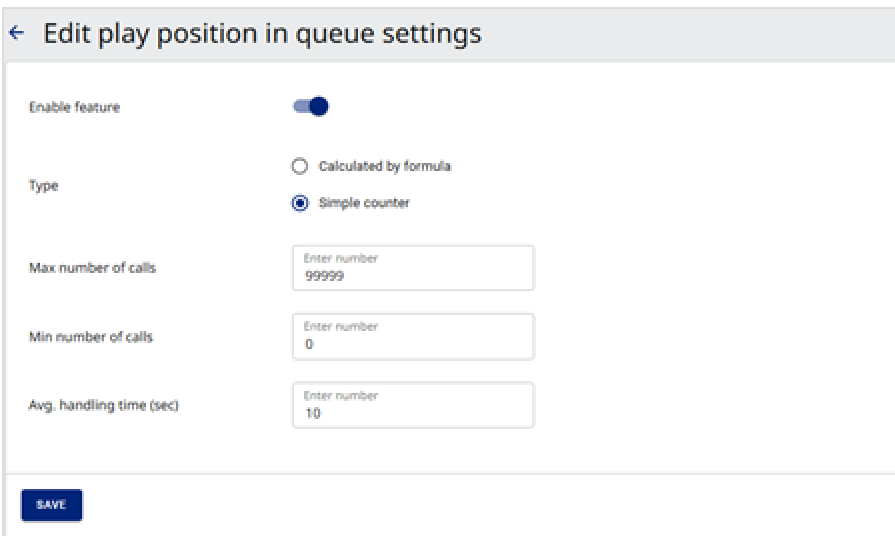
     - **Immediate dial** — to immediately dial the callback from the agent, select the check box.
   - **Callback queue name** — select the queue in which to place the callback.
4. Click **Save.**

Play Position In Queue

> **Note**
> Play Position In Queue (PIQ) is based on a theoretical/statistical position calculation. The actual call position may be different from the system calculation.

1. In the **Add Queue Parameters** dialog, in the **Play Position in Queue** row, click 

. The **Edit Play Position in Queue Settings** dialog appears.
2. Turn on **Enable feature**.



3. Enter the following information:
   - **Type** — how to calculate the position. Select one of the following:
     - **Calculated by formula -** formula used to calculate position in queue - see example below:
       current waiting – (current time in sec / (average handling time /agents count))
     - **Simple counter -** if value set to 10 sec it means that the progress in your place in the queue decreases by 1 every 10 seconds:
       round(CW - (TIQ / $RemoveCallsSec$))
   - **Max number of calls**— enter the highest number of calls for play PIQ.
   - **Min number of calls** — enter the lowest number of calls for play PIQ.
   - **Average handling time (sec)** — enter the AWT value from the company calculation.
4. Click **Save.**

Calculated by formula example

If there are:

- 100 calls waiting in the current queue (*current waiting*)
- 10 agent are handling the calls *(agents count)*
- 120 sec - average handling time, configured

After 120 sec:

- Your place in the queue will be 90. The calculation is 100 – (120/(120/10))
- 10 calls will be handled

After 5 min(300 sec):

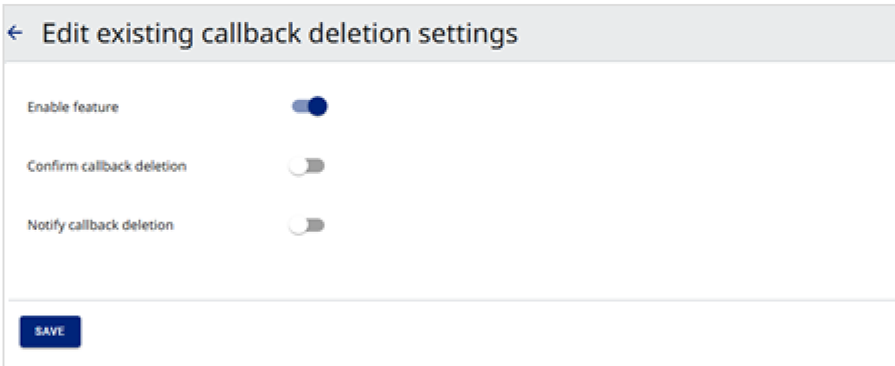
- Your place in the queue will be 75. The calculation is 100 – (300/(120/10))
- 25 calls will be handled

Existing Callback Deletion

Used to detect if an incoming call has a callback scheduled for the same Caller ANI, and if so, deletes it.

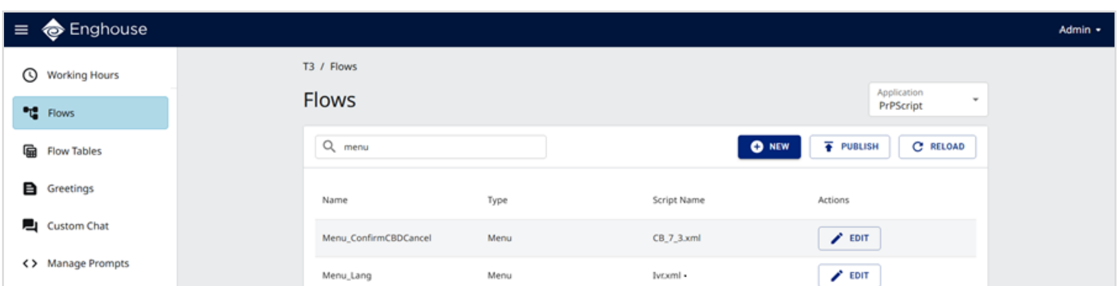
1. In the **Add Queue Parameters** dialog, in the **Callback Deletion** row, click 

. The **Edit Callback Deletion Settings** dialog appears.
2. Turn on **Enable feature**.



3. Enter the following information:
   - **Confirm callback deletion** — to ask the caller how to handle the existing callback, turn on.

     > **Note**
     >
     > The prompt name is “CBDConfirmCancel”. The options are: 1= cancel callback and wait in queue, 2 = end call and await callback, 3 = wait in queue and retain callback. It is visible from the flows.

   - **Notify callback deletion** — to inform the caller of a deleted callback, turn on.

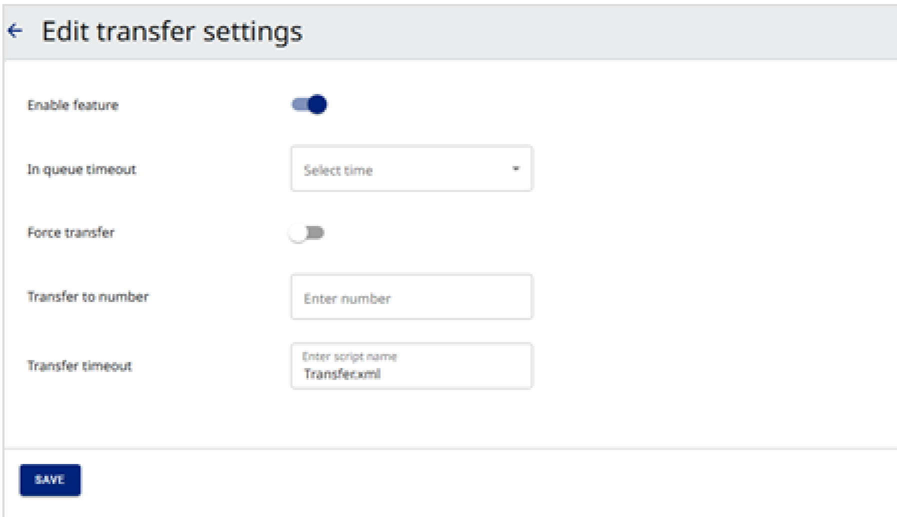
     > **Note**
     >
     > The notification recording name is “CBDNotifyCancel”.

4. Click **Save**.

Transfer

1. In the **Add Queue Parameters** dialog, in the **Transfer** row, click 

. The **Edit Transfer Settings** dialog appears.
2. Turn on **Enable feature**.



3. Enter the following information:

    ◦ **In queue timeout** — select the in queue time after which the transfer option should be offered.

    > **Note**
    > When a specific **In queue timeout** is selected for transfer:
    >
    > - The transfer option is offered to the caller *every* In queue timeout period.
    > - For the Callback and Send to VM actions, the selected **In queue timeout** value is unavailable.

    ◦ **Force transfer** — to transfer without prompting for caller input, turn on.

    ◦ **Transfer to number** — enter the number to transfer the caller to.

    > **Note**
    > Refer to the description of Phone Number properties in the *CCaaS Designer Help* for more details on this field.

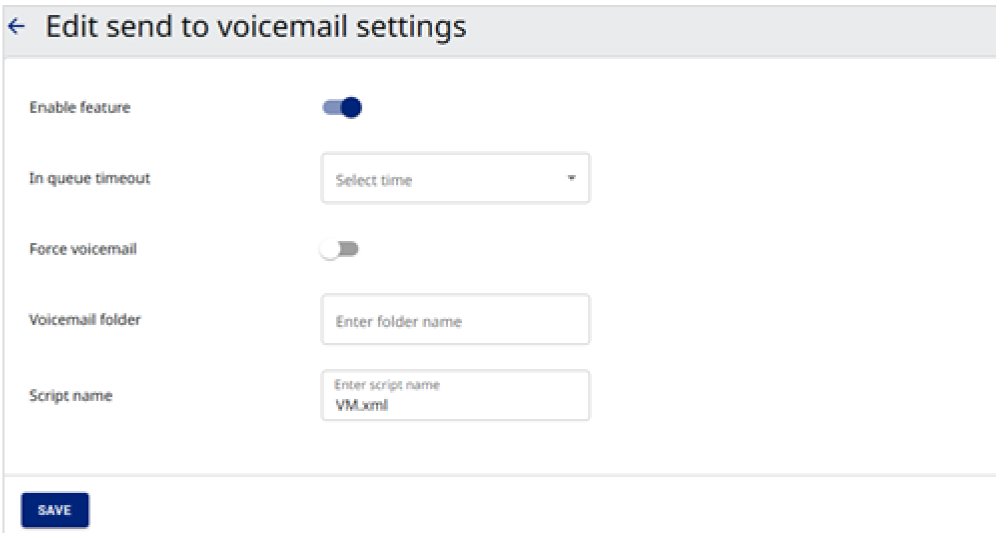
    > **Caution**
    > Do not change the script in **Transfer timeout**. This field is designed for the service provider to customize the transfer flow.

4. Click **Save**.

Send to Voicemail

1. In the **Add Queue Parameters** dialog, in the **Send to Voicemail** row, click 

. The **Edit Send to Voicemail Settings** dialog appears.
2. Turn on **Enable feature**.



3. Enter the following information:
   - **In queue timeout** — select the in queue time after which the voicemail option should be offered.

     > **Note**
     >
     > When a specific **In queue timeout** is chosen for voicemail:
     >
     > - The callback option is offered to the caller *every* In queue timeout period.
     > - For the Callback and Transfer actions, the selected **In queue timeout** value is unavailable.

   - **Force voicemail** — to send to voicemail without prompting for caller input, turn on.
   - **Voicemail folder** — enter the tenant identity for receiving voicemail messages, in the format *Voicemail@YourUPNsuffix,* for example, *voicemail@sc.loc*

     > **Note**
     >
     > *Voicemail* refers to a system folder created automatically for your tenant. Do not change this name.

     > **Caution**
     >
     > Do not change the **Script name**. This field is designed for the service provider to customize the send to voicemail flow.

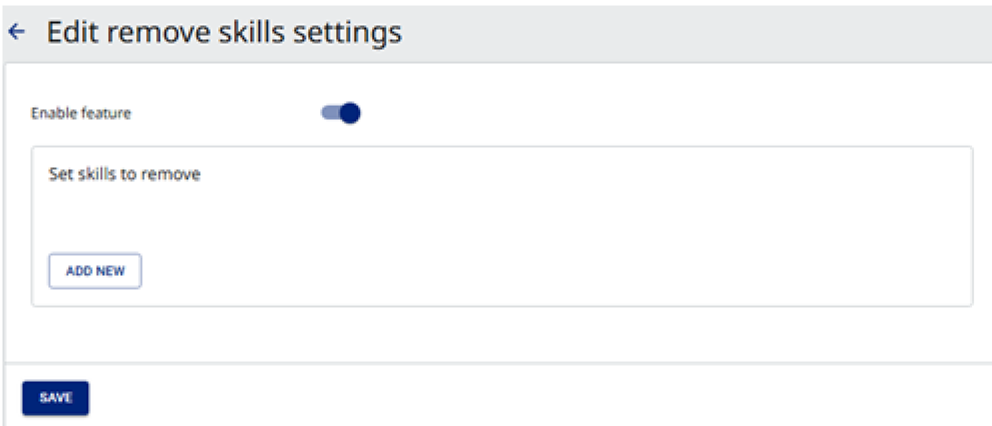
4. Click **Save**.

Remove Skill

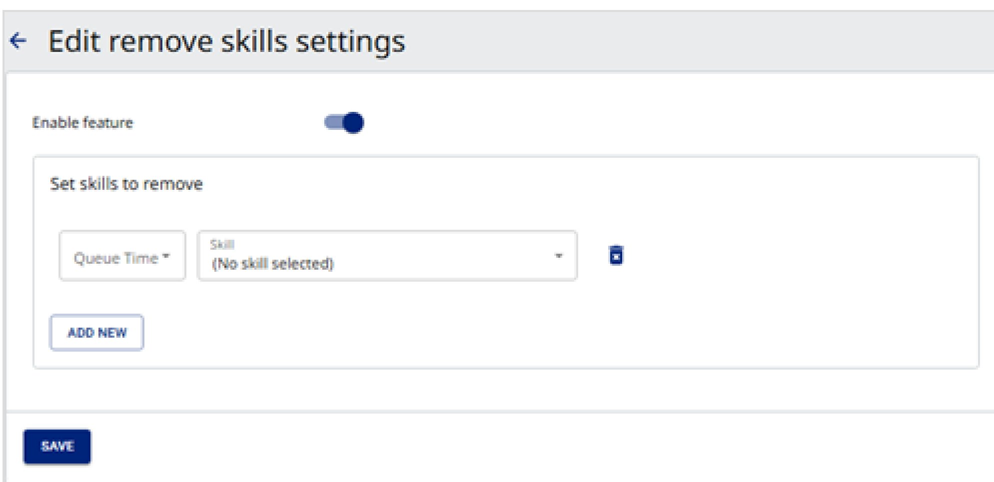
When the pool of all qualifying agents are busy, removing skills from the call potentially increases the qualifying agent pool size.

1. In the **Add Queue Parameters** dialog, in the **Remove Skill** row, click 

. The **Edit Remove Skill Settings** dialog appears.
2. Turn on **Enable feature**.



3. Click **Add New**.



4. Enter the following information:
   - **Queue Time** — select after how long in the queue to remove the skill.
   - **Skill** — select the skill to remove.

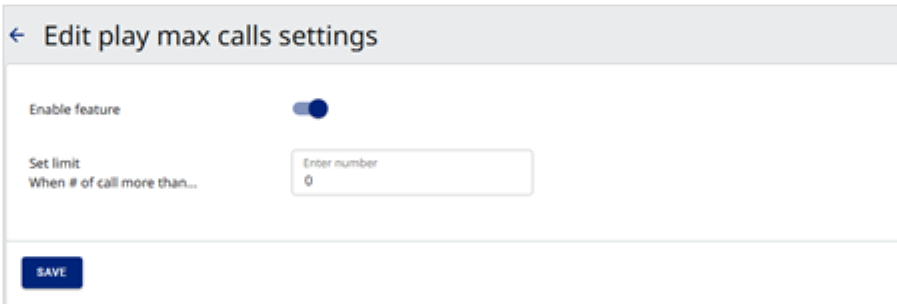
5. To set additional skills to remove, repeat steps 3-4.
6. To remove a skill that you've set, click .
7. Click **Save**.

Play Max Calls

When Play Max Calls is enabled, when the call is first queued, if the number of calls in queue exceeds a configurable threshold, the system plays the total number of calls in queue.

1. In the **Add Queue Parameters** dialog, in the **Play Max Calls** row, click 

. The **Edit Play Max Calls Settings** dialog appears.
2. Turn on **Enable feature**.



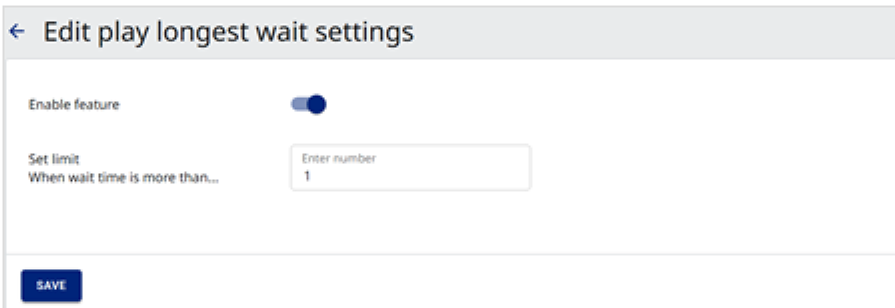
3. In **Set limit/When # of calls more than**, enter the number of calls.
4. Click **Save**.

Play Longest Wait

When Play Longest Wait is enabled, when the call is first queued, if the longest wait time in the queue exceeds a configurable threshold, the system plays the longest wait time in queue.

1. In the **Add Queue Parameters** dialog, in the **Play Longest Wait** row, click 

. The **Edit Play Longest Wait Settings** dialog appears.
2. Turn on **Enable feature**.



3. In **Set limit/When wait time more than**, enter the number of seconds.
4. Click **Save.**

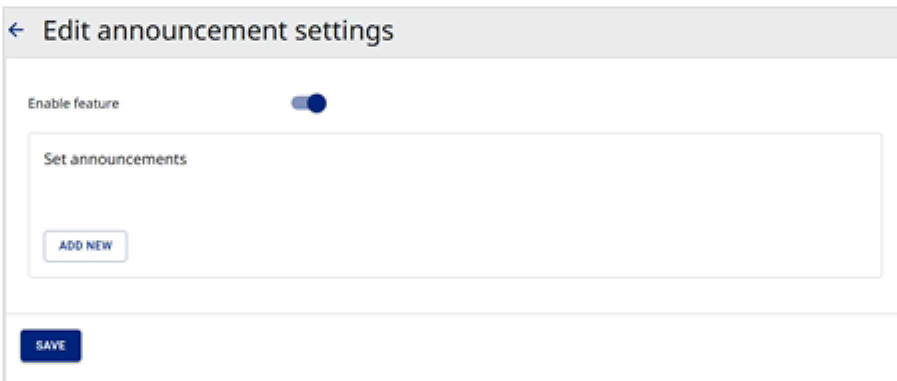
Announcements

When Announcements is enabled, the system plays additional audio files to calls in queue, such as promotional messages and comforting messages.

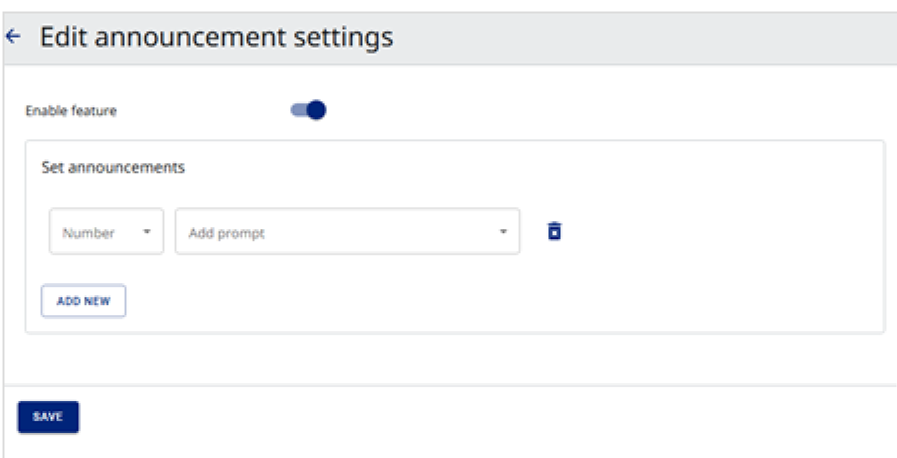
> **Note**
>
> The time interval between announcements is determined by the length of the wave file the IVR plays for calls waiting in queue.

1. In the **Add Queue Parameters** dialog, in the **Announcements** row, click 

. The **Edit Announcements Settings** dialog appears.
2. Turn on **Enable feature**.



3. Click **Add New.**



4. Enter the following information:
    - **Number** — select the loop number.
    - **Add prompt** — select the prompt to play.
5. To set additional announcements, repeat steps 3-4.
6. To remove an announcement, click .

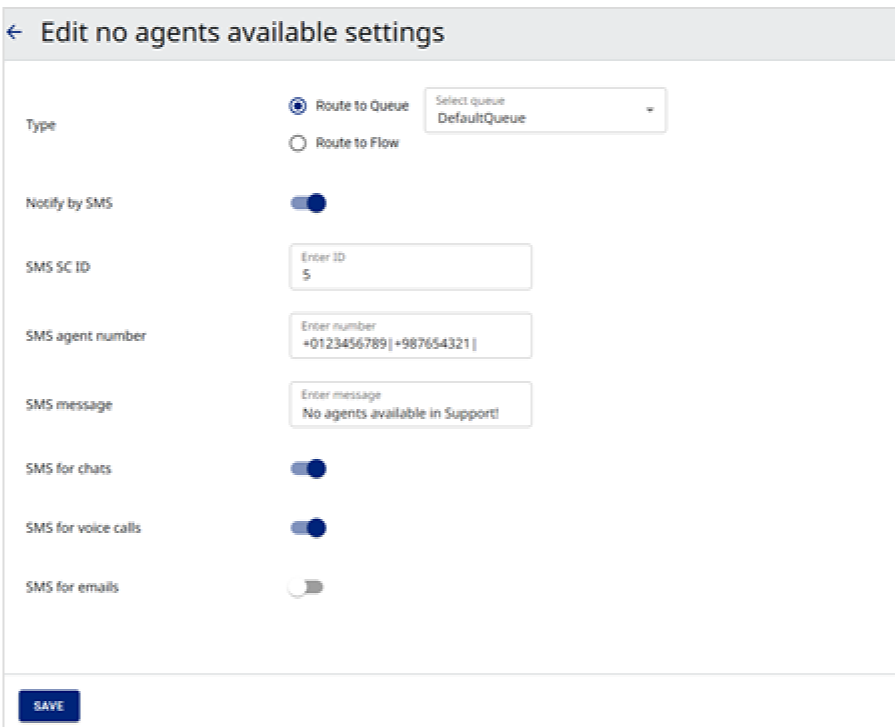
No Agents Available

No Agents Available is triggered when the request to queue a call is rejected by the ACD. By default, the ACD rejects requests to queue a call when there are no qualifying agents logged on to service it. The call is then rerouted to a different queue or flow.

> **Note (For the service providers)**
> The SMS notification is managed by Social Connector which must be deployed and configured with an SMS vendor.

1. In the **Add Queue Parameters** dialog, in the **No Agents Available** row, click 

. The **Edit No Agents Available Settings** dialog appears.



2. Enter the following information:

   - **Type** — how to reroute the call. Select one of the following:

     - **Route to queue** — select to route to a specific queue and then select the queue from the list.
     - **Route to flow** — select to route to a specific flow and then select the flow from the list.

     > **Note**
     > The system prevents a call from being repeatedly presented to the same queue. Instead, the system forwards the call to the **Flow_Difficulties** flow, that is part of the **PrPScript** application. By default, this flow plays an audio file and then hangs up the call.

> **Note (For the service providers)**
> The flow entries that appear in the **Select flow** list originate in the Flows module. If you need to add a new flow for No Agents Available, we recommend that you add the flow placeholder to the *Flows.xml*.

- **Notify by SMS** — to enable an SMS notification to be sent when no agents are available, turn on.
- **SMS SC ID** — enter the Social Connector instance ID that will send the SMS.
- **SMS agent number** — enter a pipe (|) delimited list of recipients that will receive the SMS (every number must end with the| symbol).
- **SMS message**, — enter the message to send.
- **SMS for chats**, **SMS for voice calls**, and/or **SMS for emails** — to send an SMS for chats, voice, calls, and/or emails, turn on the item.

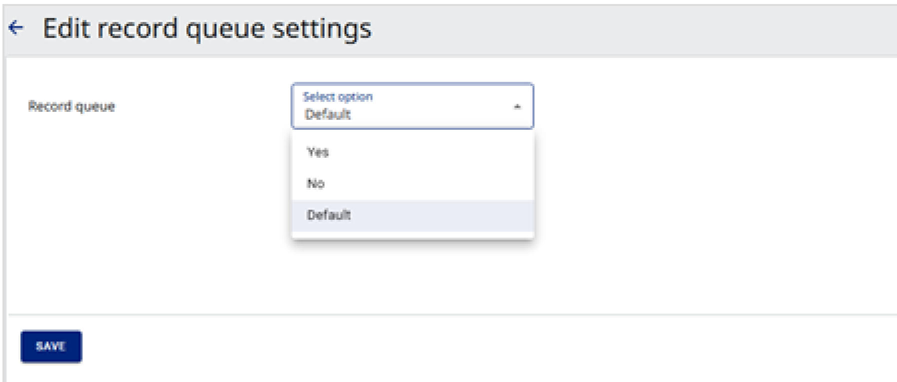
3. Click **Save**.

Record Queue

Record Queue is triggered before the call is answered by the agent.

1. In the **Add Queue Parameters** dialog, in the **Record Queue** row, click 

. The **Edit Record Queue Settings** dialog appears.



2. In **Record queue**, select one of the following:

   - **Yes** — record the calls in this queue.
   - **No** — do not record the calls in this queue.
   - **Default**— follow the configuration in General parameters.

   If in **General parameters**, **Record incoming calls** is selected, the calls in this queue will be recorded. See Edit and publish general parameters.

3. Click **Save.**

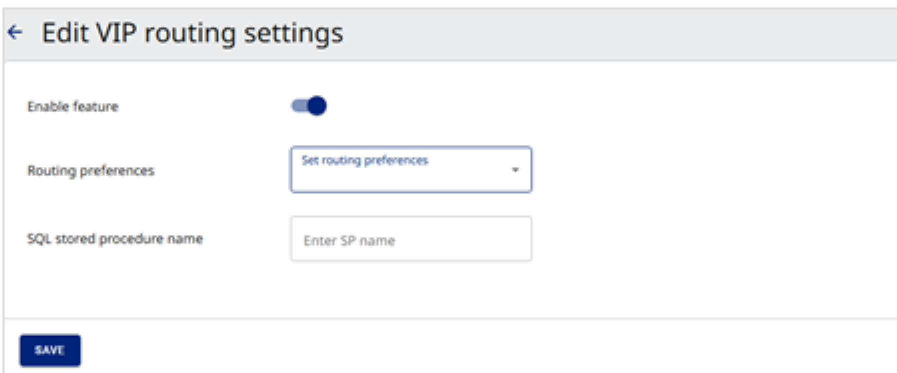
VIP Routing

Route to the last agent who interacted with the customer. The logic is configured in each tenant historical database, in the stored procedure *spPRP_GetLastHandledAgent.* You can customize the stored procedure or replace it with another one, but you always need to return the field Agent_ID.

> **Note**
>
> If **VIP Routing** is disabled, the routing follows the default CCaaS behavior.
>
> If **VIP Routing** is enabled, the routing is according to the Agent_ID that the system gets from the SQL stored procedure.

1. In the **Add Queue Parameters** dialog, in the **VIP Routing** row, click 

. The **Edit VIP Routing Settings** dialog appears.
2. Turn on **Enable feature**.



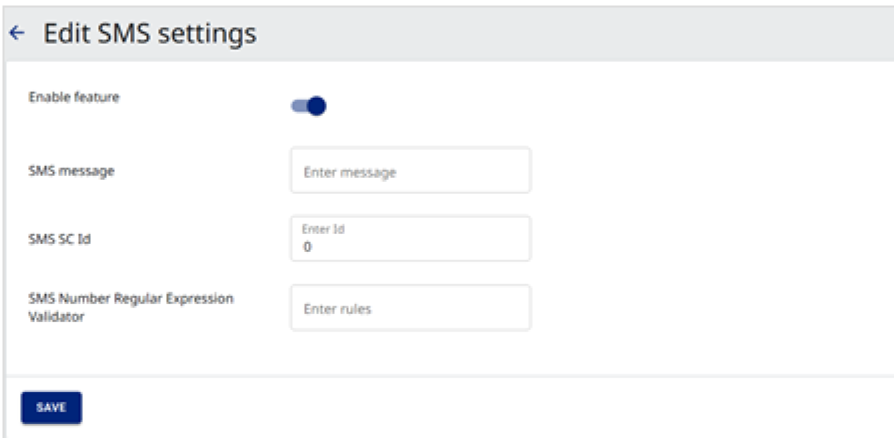
3. Enter the following information:
   - **Routing preferences** — select one of the following:
     - **Route to queue** — calls will follow the CCaaS default route.
     - **Route to voicemail** — calls will be sent to the Voicemail flow.
     - **Route to callback** — calls will be sent to the Callback flow.
   - **SQL stored procedure name** — enter the name of the stored procedure that contains the logic for VIP routing.
4. Click **Save.**

SMS (in-queue timeout)

When an in-queue timeout occurs and the caller is calling from a number suitable for SMS, if enabled, this action sends the caller an SMS that provides links to alternative means of contact.

1. In the **Add Queue Parameters** dialog, in the **SMS** row, click 

. The **Edit SMS Settings** dialog appears.
2. Turn on **Enable feature**.



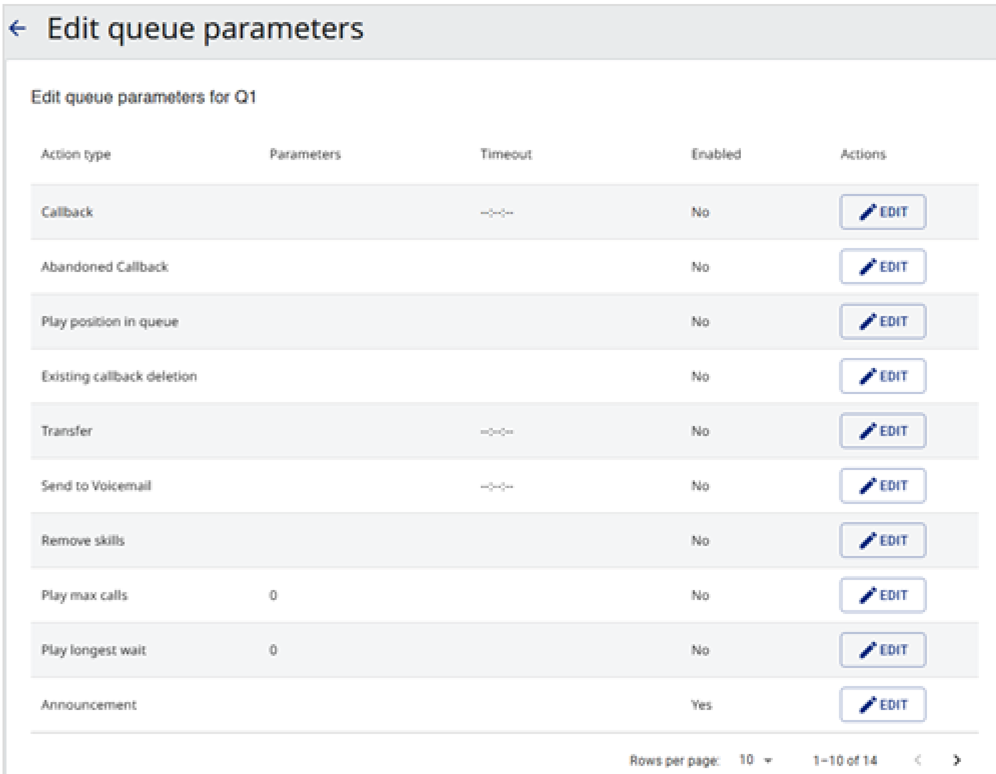
3. Enter the following information:
    - **SMS message** — enter the content of the SMS.
    - **SMS SC ID** — type the Social Connector instance ID that will send the SMS.
    - **SMS number regular expression validator** — enter the regular expression that the caller's number must match to be suitable for SMS.

    > **Note (For the service providers)**
    > The SMS notification is managed by Social Connector, which must be deployed and configured with an SMS vendor.

4. Click **Save**.

Edit a queue

1. On the **Smart Queues** page, select the application in the **Application** list.
2. In the queue's row, under **Actions**, click ••• and then click **Edit queue parameters**.
3. The **Edit Queue Parameters** dialog appears.


Edit queue parameters

Edit queue parameters for Q1

Action type	Parameters	Timeout	Enabled	Actions
Callback		--:--:--	No	EDIT
Abandoned Callback			No	EDIT
Play position in queue			No	EDIT
Existing callback deletion			No	EDIT
Transfer		--:--:--	No	EDIT
Send to Voicemail		--:--:--	No	EDIT
Remove skills			No	EDIT
Play max calls	0		No	EDIT
Play longest wait	0		No	EDIT
Announcement			Yes	EDIT

Rows per page: 10 1–10 of 14

4. Configure the action-type parameters as described in the following topics:
   - Callback
   - Abandoned Callback
   - Play Position in Queue
   - Existing Callback Deletion
   - Transfer
   - Send to Voicemail
   - Remove Skill
   - Play Max Calls
   - Play Longest Wait
   - Announcements
   - No Agents Available

- Record Queue
- VIP Routing
- SMS

Publish queues

When publishing Smart Queues, Provisioning Portal commits Smart Queues customization to a pre-configured network path. The Web farm (IIS instances) references this path as the physical path (source path) of the scripts virtual folder for your tenant.

Stop

Check with your service provider for the exact publishing behavior before using this feature. Depending on the system configuration, the path to write Smart Queues (publish) may be the same as the path to read Smart Queues (reload), or the two paths may be different.

Caution

If the two paths are different, *publishing* means committing Smart Queues customization on top of the last synchronized Smart Queues copy, in which, the last synchronized copy may be different from the *production* copy.

Note

- If both paths are the same, *publishing* means committing Smart Queues customization made on the Smart Queues page on top of the *production* copy.
- Provisioning Portal creates a backup before overwriting the original Smart Queues files. The backup files are located in the following folder: *Params_PublishedFilesBackup{dateTime}*. Inside the folder there are subfolders, one for each queue.

1. On the **Smart Queues** page, select the application in the **Application** list.
2. Do one of the following:

   To publish all queues:

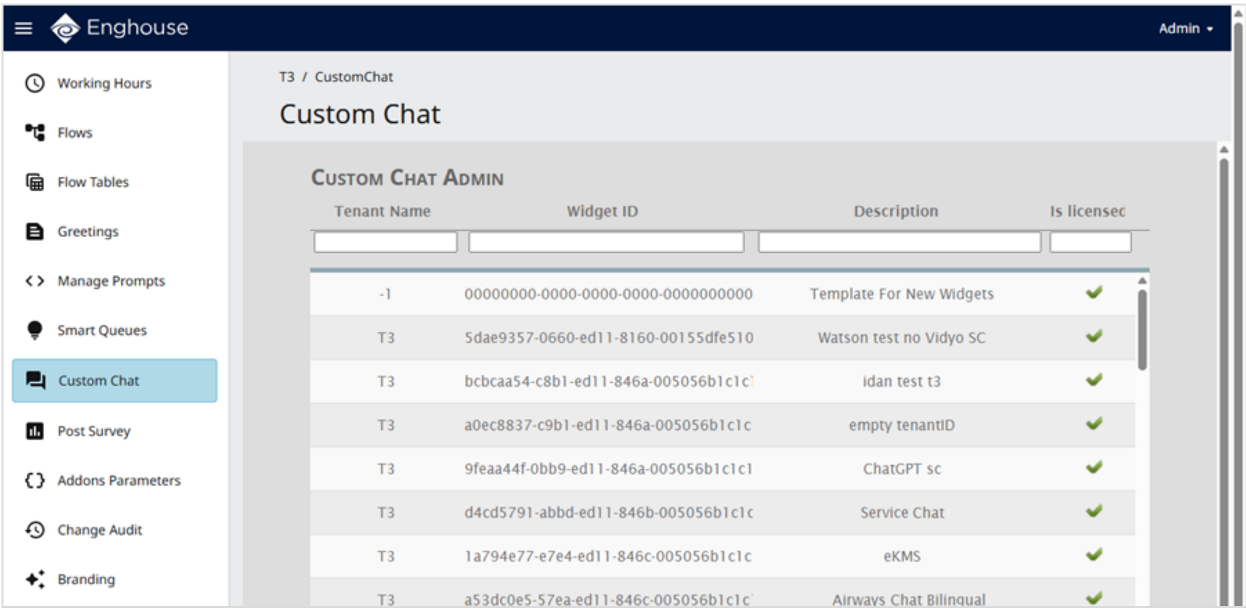
   a. Click and then click **Publish all queue parameters.**
   b. In the **Publish All Queue Parameters** dialog, click **Publish**.

   To publish an individual queue:

   a. In the queue's row, under **Actions**, click and then click **Publish queue parameters**.
   b. In the **Publish Queue Parameters** dialog, click **Publish**.

11: Custom Chat

The **Custom Chat** page appears as follows.



Overview

This page provides access to the Custom Chat Admin.

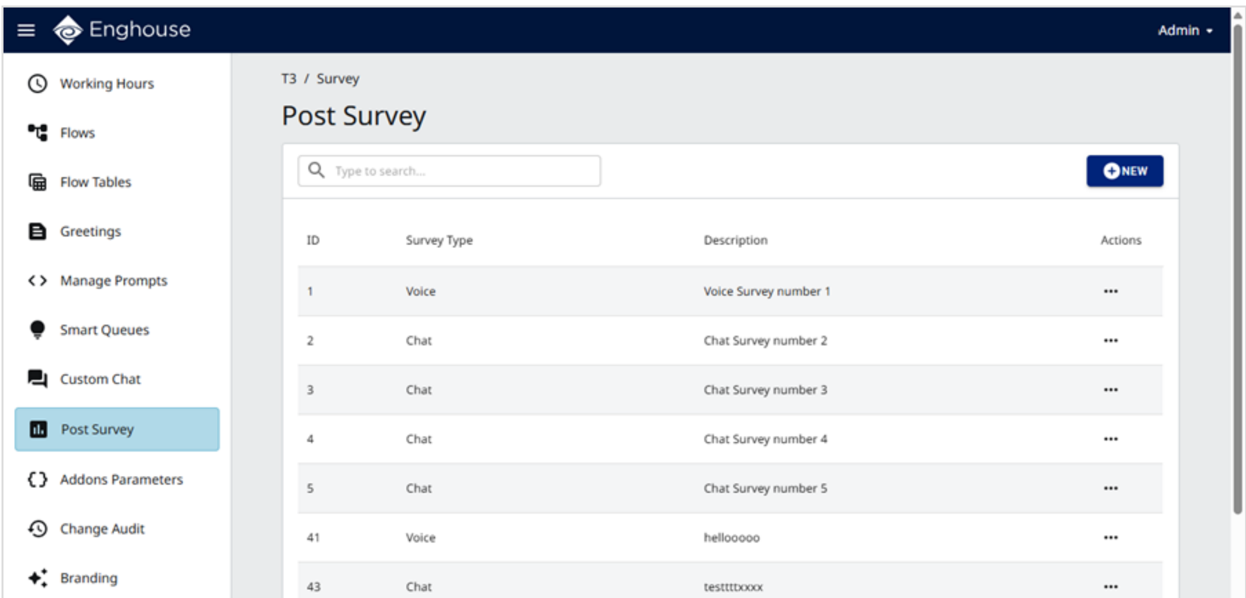
For more information, refer to the Custom Chat documentation.

12: Post Survey

This chapter contains the following information:

- Add a new survey
- Edit survey type
- Edit survey questions
- View survey preview

If configured for your tenant, the **Post Survey** page appears as follows.



Overview

Post Survey defines voice surveys and chat surveys for use after voice or chat calls.

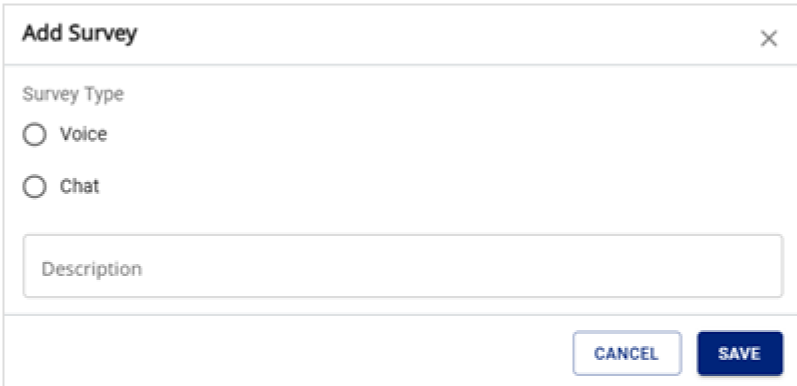
You can define the questions and their order, and preview the survey.

You cannot delete a survey that contains questions.

Add a new survey

1. On the **Post Survey** page, click 

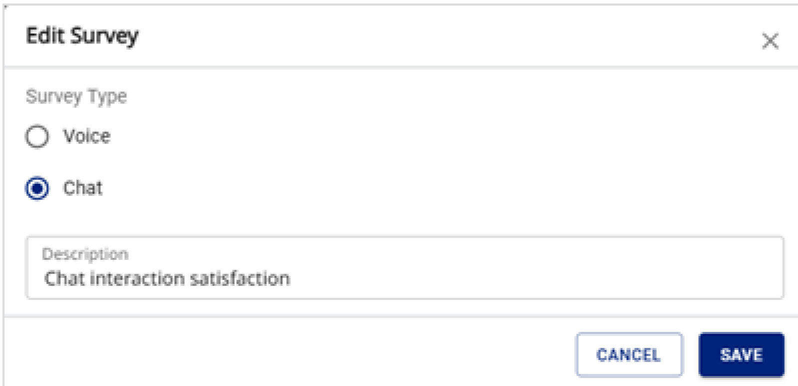
. The **Add Surveys** dialog appears.



2. Enter the following information:
   - **Survey type** — select whether to use the survey after **Voice** or **Chat** calls.
   - **Description** — a description of the survey.
3. Click **Save**. The message *Successfully added* appears and the new survey appears on the **Post Survey** page.

Edit survey type

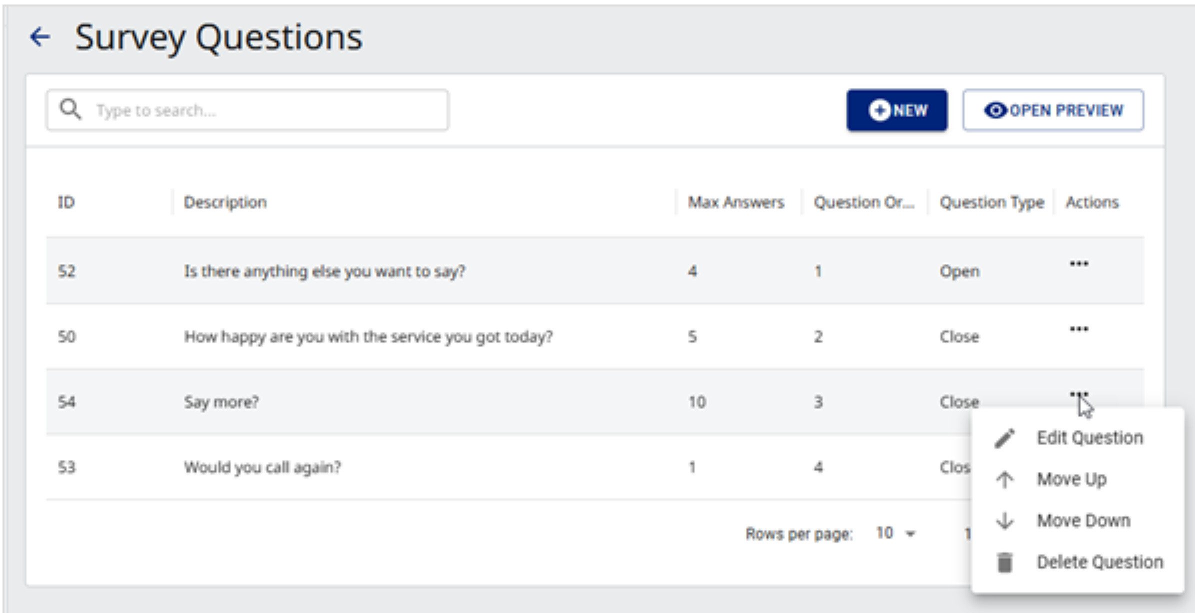
1. On the **Post Survey** page, in the survey's row, under **Actions**, click ••• and then click **Edit Survey**. The **Edit Survey** dialog appears.



2. Change the following information, as required:
    - **Survey type** — whether to use the survey after **Voice** or **Chat** calls.
    - **Description** — a description of the survey.
3. Click **Save**. The message *Successfully changed* appears.

Edit survey questions

1. On the **Post Survey** page, in the survey's row, under **Actions**, click ••• and then click **View Survey**. The **Survey Questions** dialog appears.



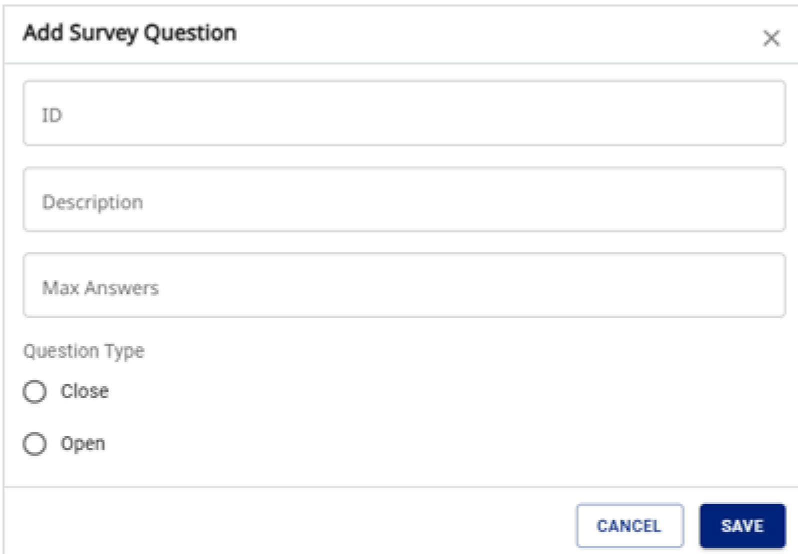
From here you can:

- Add a new question
- Edit a question
- Change question order
- Delete a question
- View the survey preview

Add a new question

1. In the **Survey Questions** dialog , click 

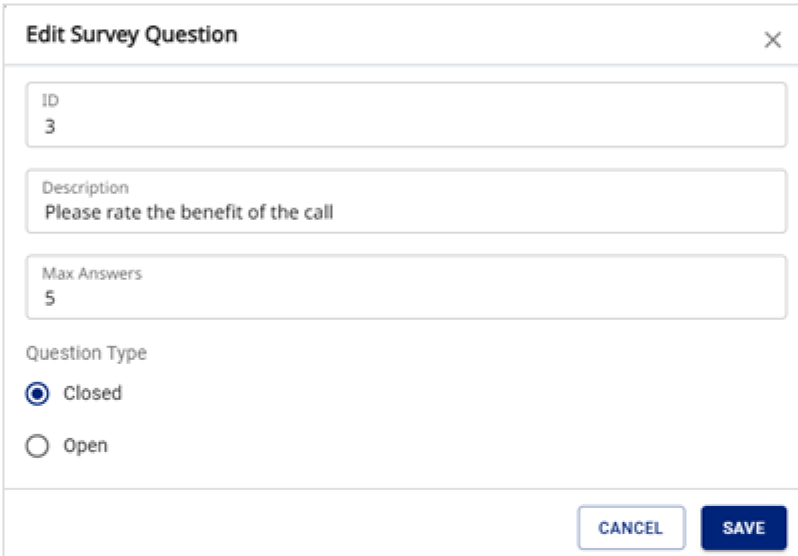
. The **Add Survey Question** dialog appears.



2. Enter the following information:
   - **ID** — a number that is unique in this survey.
   - **Description** — the question text.
   - **Max Answers** — the maximum possible answers. For a Yes/No answer, enter 1 and select the Closed Question Type.
   - **Question Type** — select one of the following:
     - **Closed** — select to include stars or a check box/switch.
     - **Open** — select to include a text input area.
3. Click **Save**. The message *successfully added* appears and the new question appears on the **Add Survey Questions** page.

Edit a question

1. In the **Survey Questions** dialog, in the question's row, under **Actions**, click ••• and then click **Edit Question**. The **Edit Question** dialog appears.



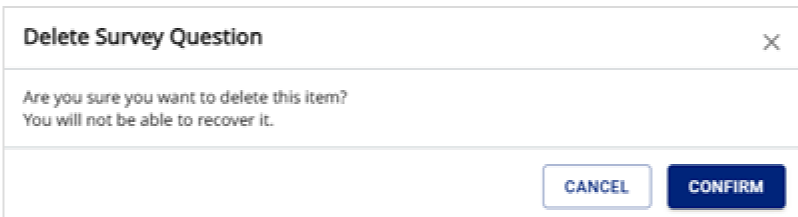
2. Change the information, as required.
3. Click **Save**. The message *Successfully changed* appears.

Change question order

In the **Survey Questions** dialog, in the question's row, under **Actions**, click ••• and then click **Move Up** or **Move Down**, as appropriate.

Delete a question

1. In the **Survey Questions** dialog, in the question's row, under **Actions**, click ••• and then click **Delete Question**. The **Delete Survey Question** dialog appears.

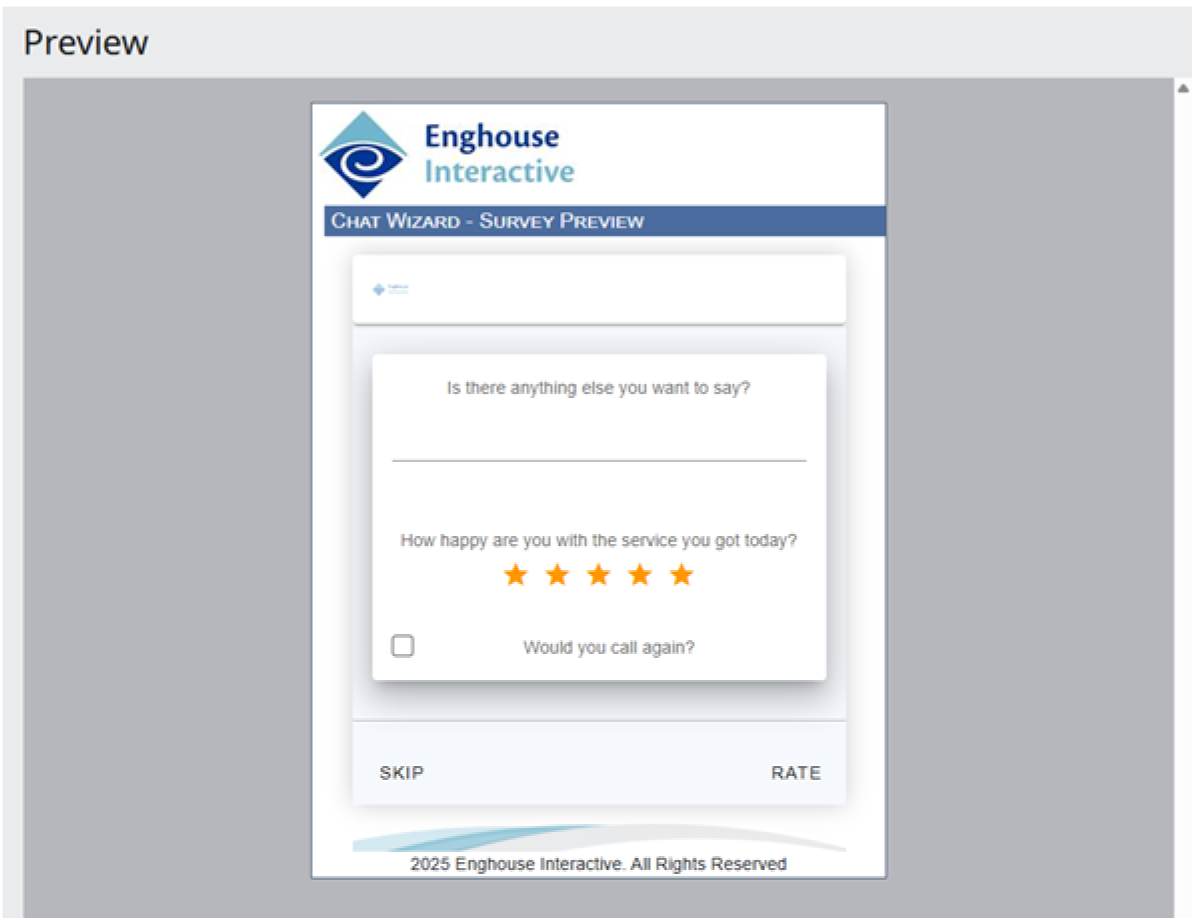


2. Click **Confirm**. The message *Successfully deleted* appears.

View survey preview

> **Note**
> For a Yes/No answer, your administrator can change the checkbox to a switch using the CustomChat New Widget template.

1. On the **Post Survey** page, in the survey's row, under **Actions**, click ••• and then click **View Survey**. The **Survey Questions** dialog appears.
2. Click OPEN PREVIEW. The **Preview** page appears.



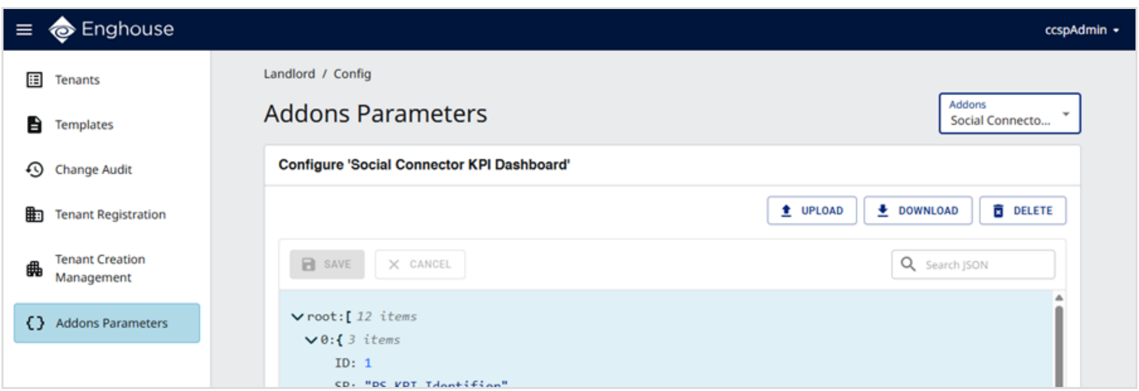
13: Addons Parameters

This chapter contains the following information:

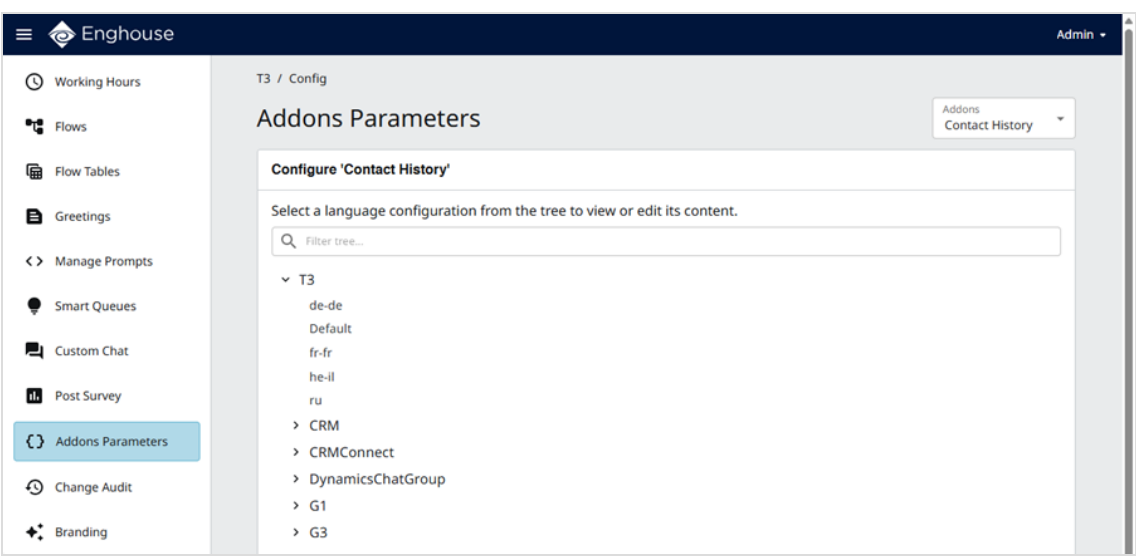
- Download an existing configuration file
- Upload a configuration file
- Delete a configuration file
- Search for a configuration property
- Edit a configuration file

The **Addons Parameters** page appears as follows.

Landlord view



Tenant view



Overview

Landlords and tenants can now use the **Addons Parameters** page of the Provisioning Portal to configure the following addons.

Addon	Enabled by landlord via
Contact History	`PrPConnectionString` in the tenant *.config* file
Social Connector KPI Dashboard	`PrPConnectionString` in the tenant *.config* file
Social Connector File Transfer	`PrPConnectionString` in the *web.config* file
Social Connector Translator*	`PrPConnectionString` in the *web.config* file
Suggestions	`PrPDB` connection string in *appSettings.json*
Text to Speech	`PrPDB` connection string in *appSettings.json*
* Used by Custom Chat.	

Landlords can configure the defaults for each addon and configure the KPI addon. Note that these addons must be updated to utilise the new configuration via the Provisioning Portal.

Tenants can administer their own add-ons for Contact History, Social Connector Translations and File-transfers, Suggestions, and TTS.

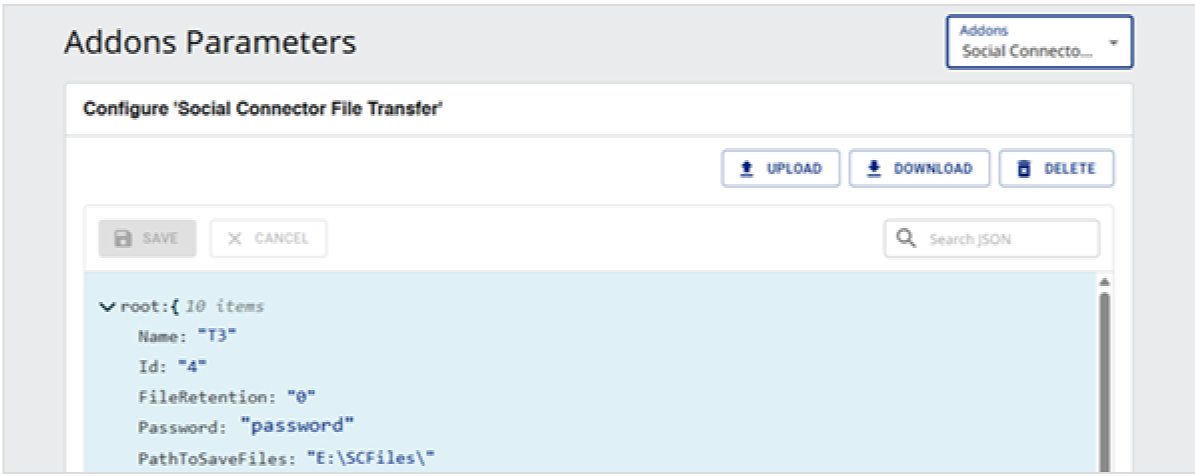
Note

- If the `PrPConnectionString` is configured and enabled, the corresponding addon instance always retrieves and uses the configuration from the database.
- If the `PrPConnectionString` is not configured, it uses the JSON configuration file located in the installation directory instead.
- The `ConfigCacheMinutes` setting used by SC Helper API is used to periodically retrieve the configuration from the database.

Download an existing configuration file

You can download a backup copy of the configuration file. The configuration file defaults to the JSON format.

1. On the **Addons Parameters** page, select the component from the **Addons** list. The **Configure [Addon Name]** dialog appears.



2. Click  .

3. The configuration is saved as a JSON file to your downloads folder.

Upload a configuration file

> **Note**
>
> - Each addon has an associated schema format that is enforced to ensure the appropriate JSON configuration file is uploaded and processed by the system.
> - The schema format is enforced when you click **Save**, not on upload.

If the current configuration is corrupt or incorrect and an error has occurred, you can restore a backup copy of the existing configuration file.

1. On the **Addons Parameters** page, select the component from the **Addons** list. The **Configure [Addon Name]** dialog appears.
2. Click 

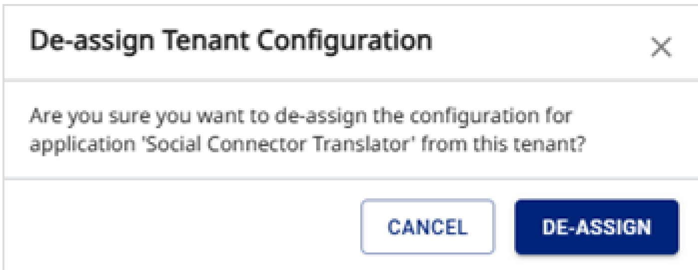
. The file selection dialog appears.
3. Select the JSON file and click **Open**.
4. When the JSON configuration is uploaded to the system, the configuration data appears in the form.
5. Verify the configuration constrains and modify if required. See Edit a configuration field.
6. When the configuration file is finalized, to upload the configuration to the database, click 

.

Delete a configuration file

1. On the **Addons Parameters** page, select the component from the **Addons** list. The **Configure [Addon Name]** dialog appears.
2. Click 

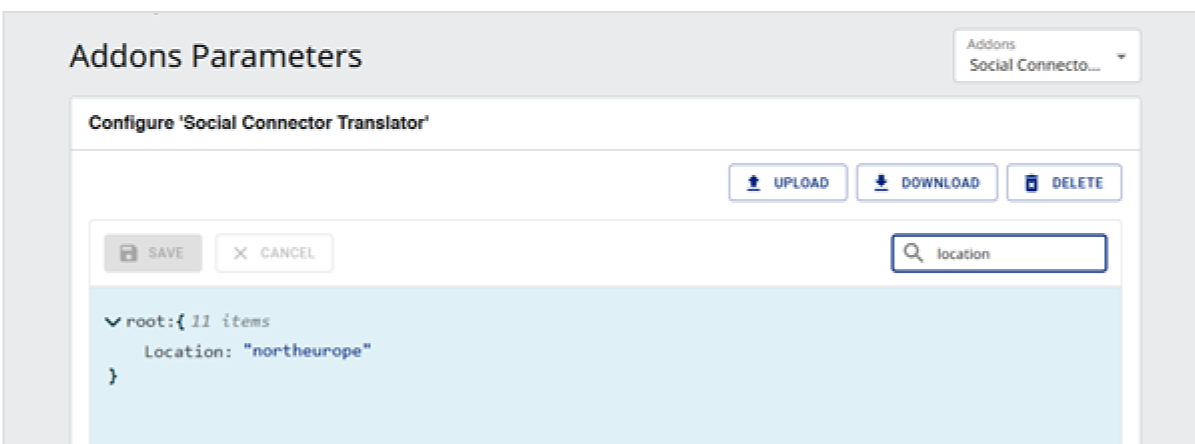
. The **De-assign Tenant Configuration** dialog appears.



3. Click **De-assign**. The configuration data is removed from the Provisioning Portal.

Search for a configuration property

1. On the **Addons Parameters** page, select the component from the **Addons** list. The **Configure [Addon Name]** dialog appears.
2. In the **Search JSON** field, enter the search text, for example, *location*. Configuration items that contain the search text appear in the dialog.

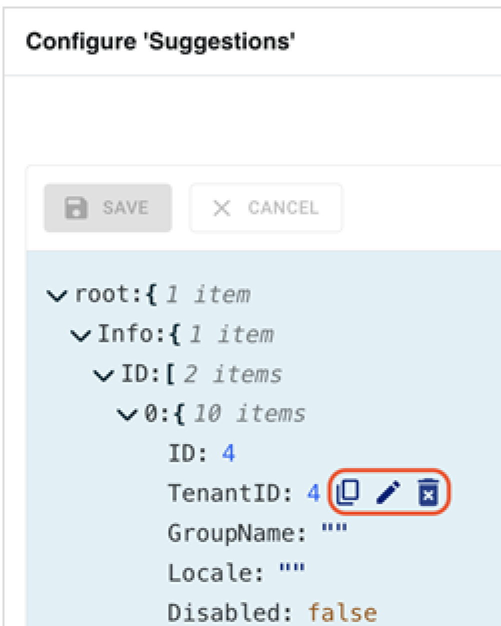


Edit a configuration file

Note

- The **Save** and **Cancel** buttons become active when you accept a change to a property’s value or delete a property’s value.
- Schema validation is applied to the submitted JSON before saving the configuration in the database.
- When you save the changes, they are committed to the database and the new configuration is enforced .

1. On the **Addons Parameters** page, select the component from the **Addons** list. The **Configure [Addon Name]** dialog appears.
2. Select the property to edit. The icons to copy, edit or delete the property's value appear next to the selected property.



3. To edit the property's value:

   a. Click  . The property's value field and a list box of data types (such as number, string, and boolean) appear.

b. Select the data type and then edit the value.

c. To accept that change, click or to discard that change, click .

4. To delete the property's value, click .

5. To commit the change to the database, click .

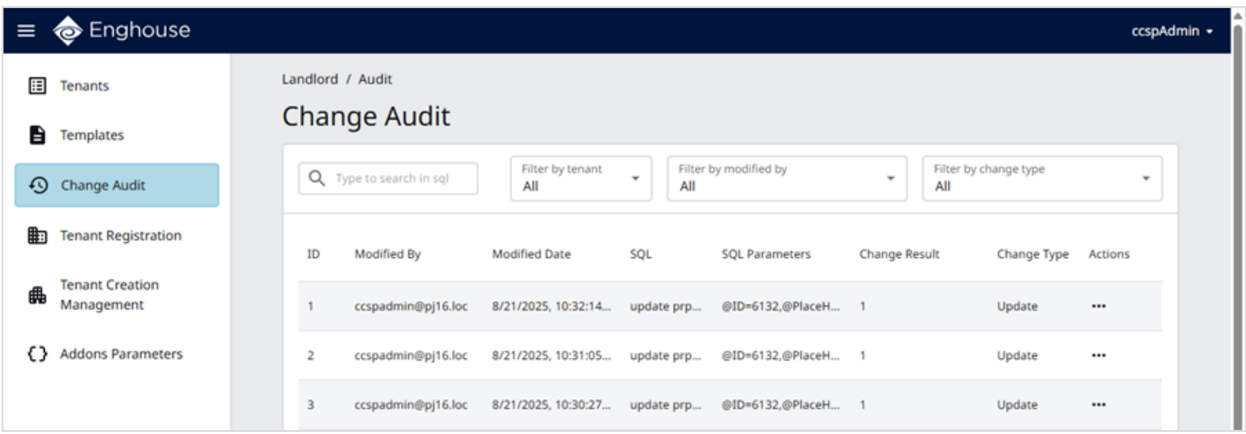
14: Change Audit

This chapter contains the following information:

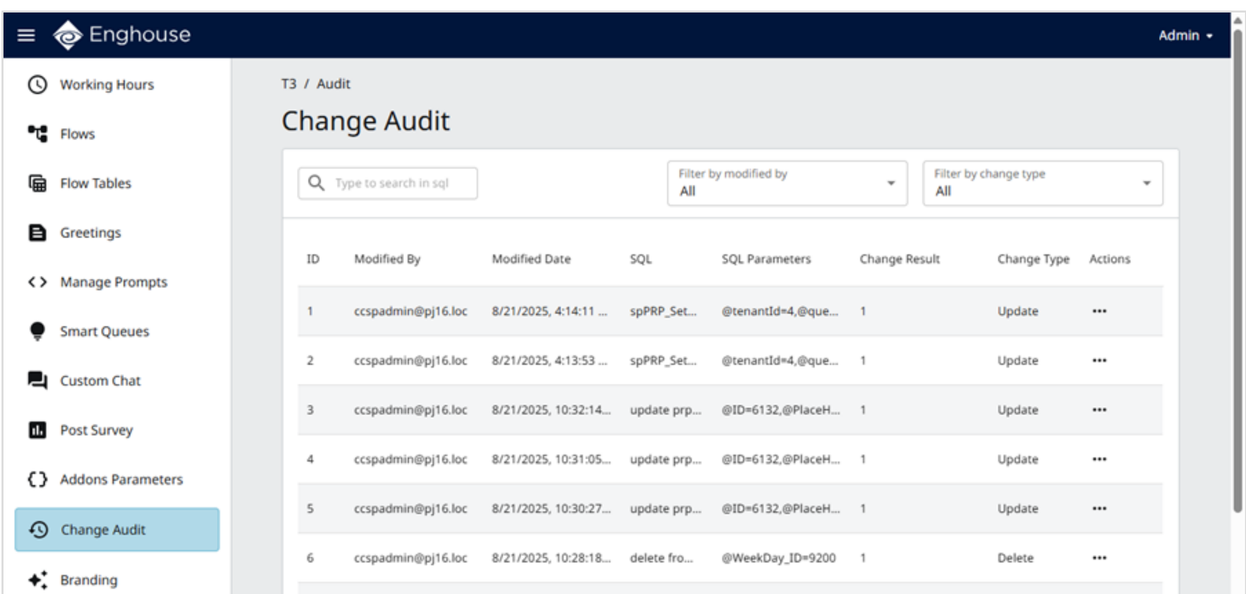
- Search by attribute or keyword
- Filter by user or change type
- View the SQL script or parameters

The **Change Audit** page appears as follows.

Landlord view



Tenant view



Overview

The change audit screen enables administrators to provide landlords and administrators with a transparent, real-time view of what’s happening inside the system, including changes, actions and access, through SQL transactions.

> **Note**
>
> By default, the audit data is purged from the system every week. The stored procedure *spPRP_AuditCleanup* is called from the Provisioning Portal service, which deletes audit data older than a week.

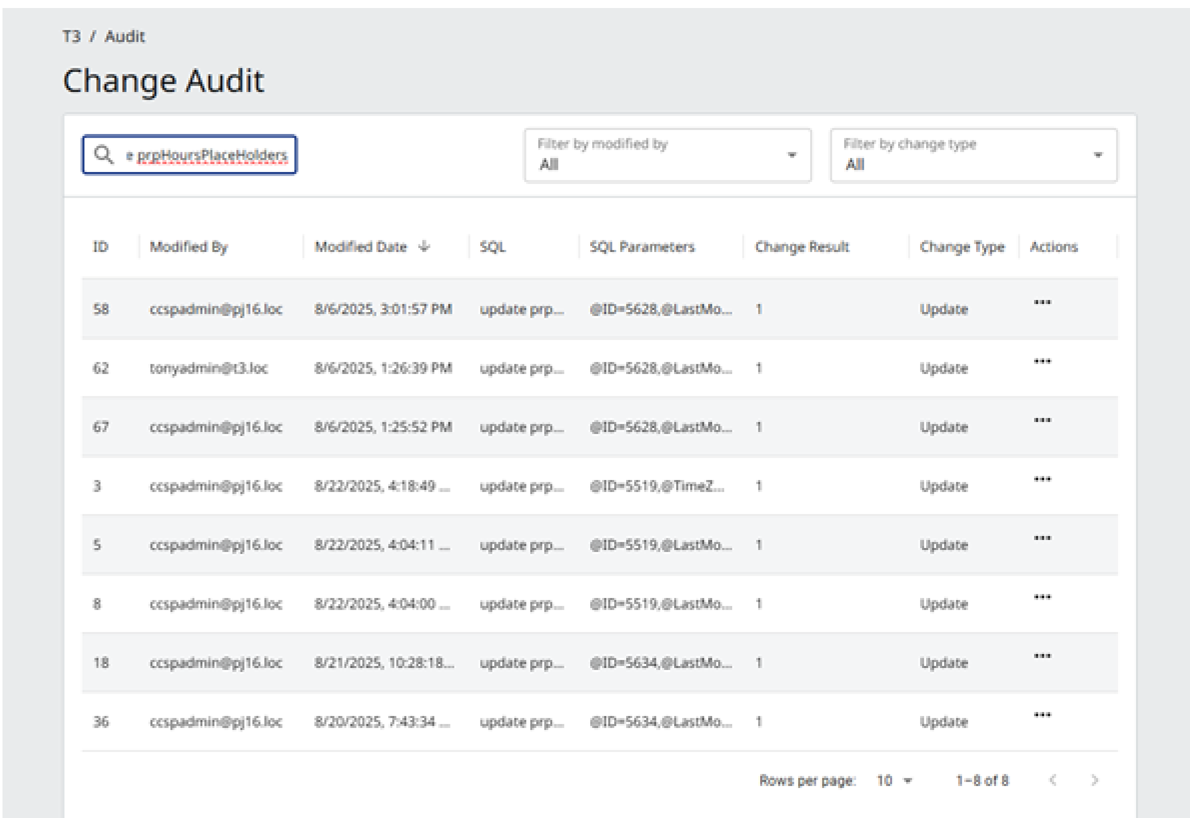
Search by attribute or keyword

Landlords and tenants can perform a keyword search to locate any relevant SQL transaction that contains the keyword.

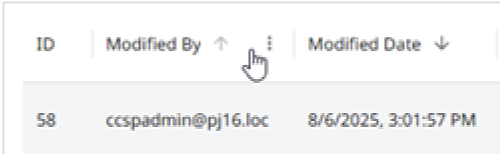
You can use the following attributes/keywords in the search text field.

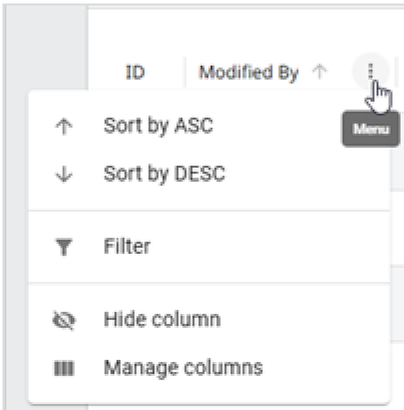
Attribute name	Description
SQL	Information about the stored procedure/SQL specifics
SQL parameters	Detailed information about the SQL transaction

1. On the **Change Audit** page, in the **Type to search in sql** field, enter the attribute/keyword.
2. Optionally select one or more filters. See Filter by user or change type.
3. The results table displays changes that match the search criteria.

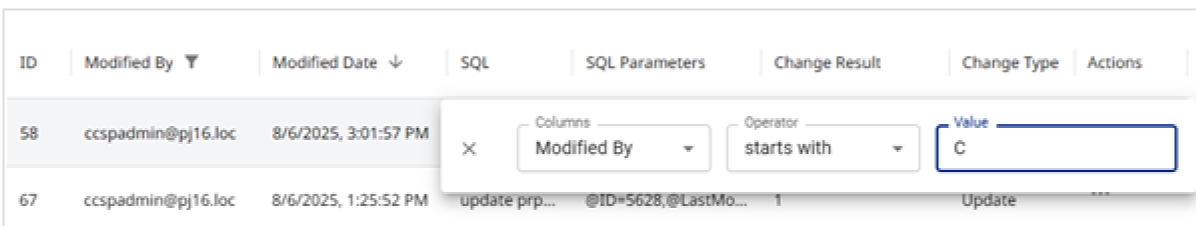


4. To sort the results in a column, point to the column heading and click the arrow or Menu that appears.

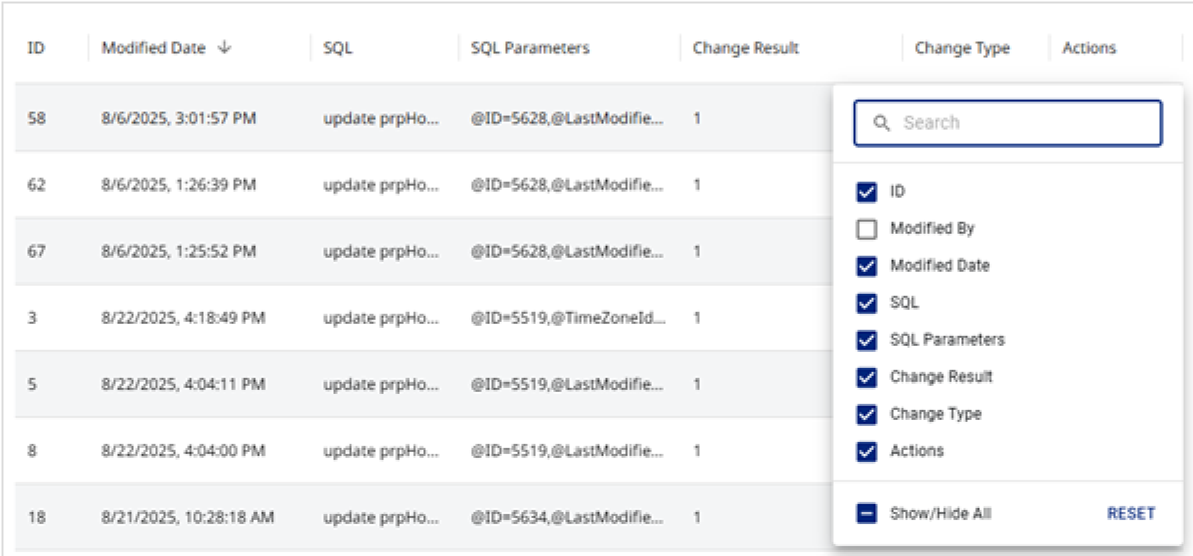




5. To filter the results in a column, click the Menu and then click **Filter**. In the Filter, select the column and operator, and enter the value.



6. To hide a column, click its Menu and then click **Hide column**.
7. To select the visible columns, click any column's Menu and then click **Manage columns**.



8. To view further details for an individual change, see View the SQL script or parameters.

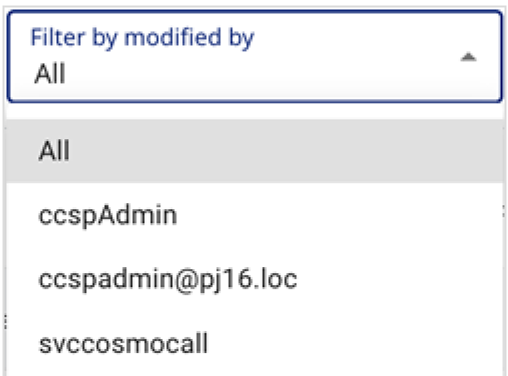
Filter by user or change type

Tenants can filter by user and/or change type.

Landlords can filter by tenant, user, and/or change type.

Filter by user

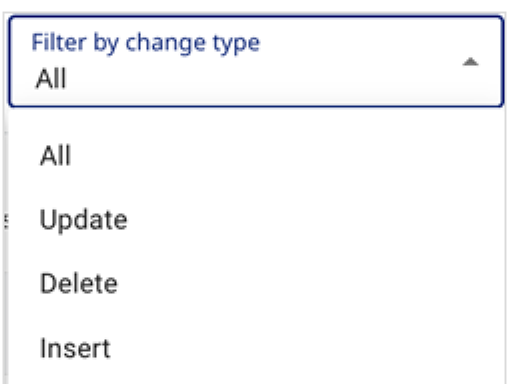
1. On the **Change Audit** page, in the **Filter by modified by** list, select **All** or a particular user.



2. The results table displays changes made by the selected user. To view further details for an individual change, see View the SQL script or parameters.

Filter by change type

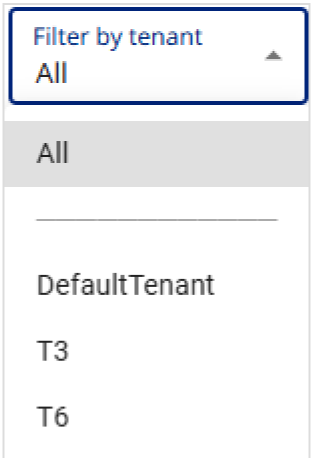
1. On the **Change Audit** page, in the **Filter by change type** list, select **All**, **Update**, **Delete**, or **Insert**.



2. The results table displays changes of the selected type. To view further details for an individual change, see View the SQL script or parameters.

Filter by tenant (landlord only)

1. On the **Change Audit** page, in the **Filter by tenant** list, select **All** or a particular tenant.

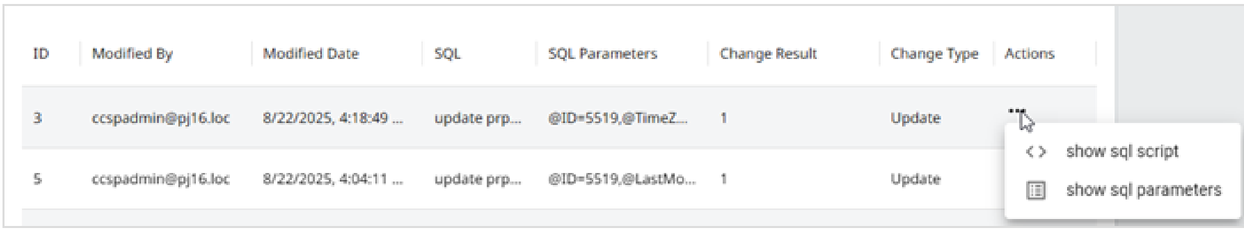


2. The results table displays changes made by the selected tenant. To view further details for an individual change, see View the SQL script or parameters.

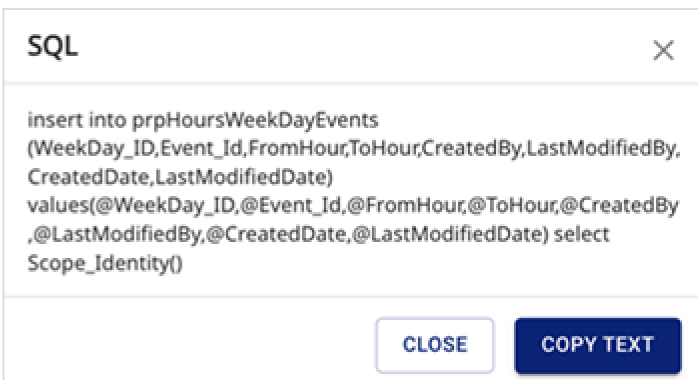
View the SQL script or parameters

After you locate the required audit record, you can view the SQL script details and the SQL parameters with the assigned values. You can also copy the text to the clipboard.

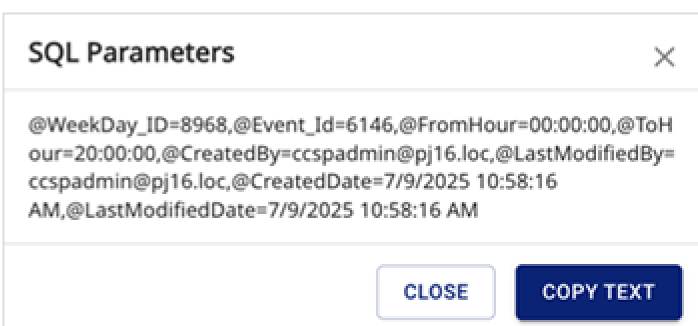
1. In the results table, under **Actions**, click ••• .



2. To view the SQL script details, click **Show sql script**. The **SQL** dialog appears. Optionally click **Copy Text** and then click **Close**.



3. To view the SQL parameters with the assigned values, click **Show sql parameters**. The **SQL Parameters** dialog appears. Optionally click **Copy Text** and then click **Close**.

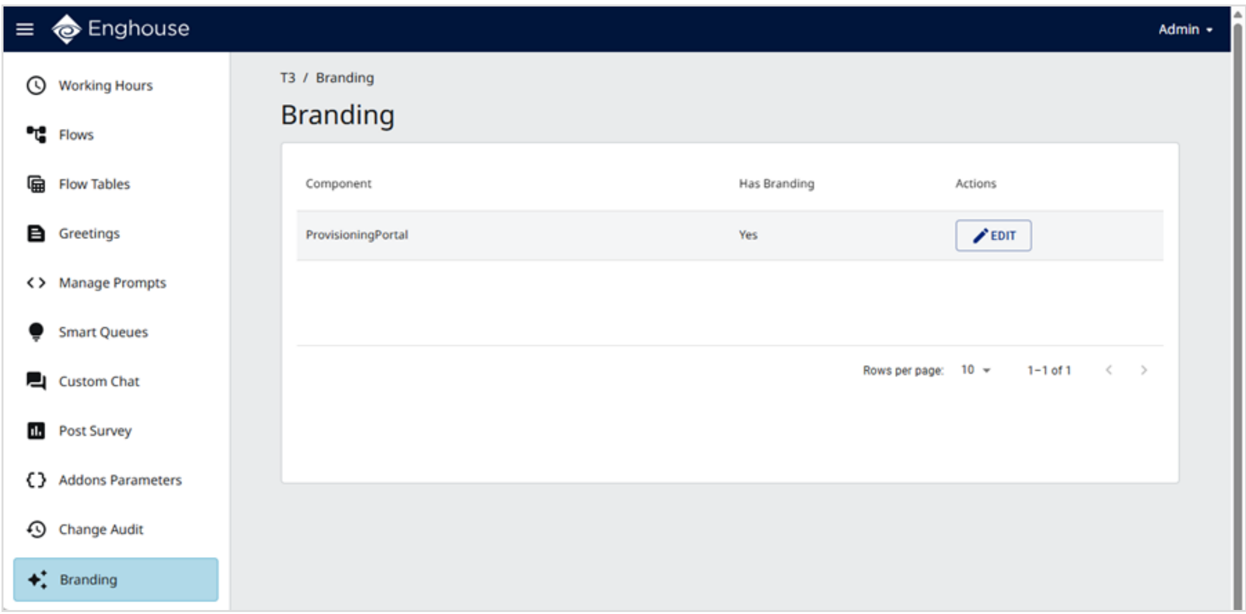


15: Branding

This chapter contains the following information:

- Edit branding for Provisioning Portal

The **Branding** page appears as follows.



Overview

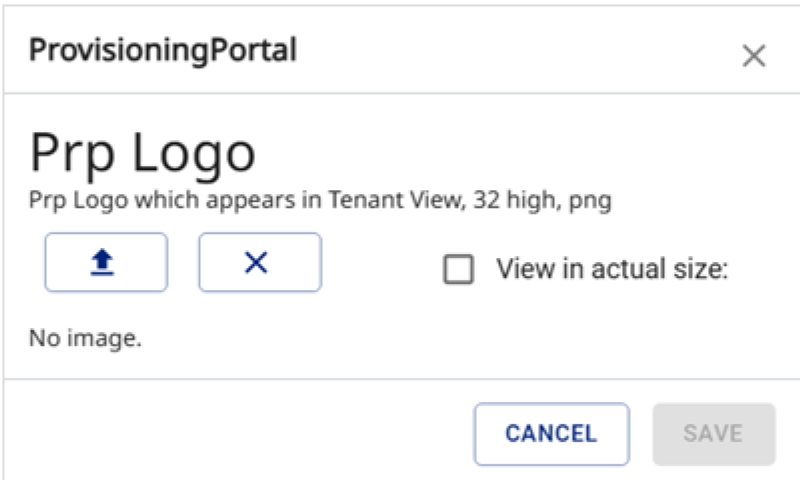
Branding defines logos and text messages to display in the Provisioning Portal.

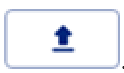
When branding is defined for a specific category, **Yes** appears in the **Has Branding** column. The branding appears when that category of service is accessed.

Edit branding for Provisioning Portal

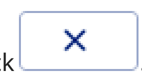
1. On the **Branding** page, in the ProvisioningPortal row, click 

.
2. The **ProvisioningPortal** dialog appears.



2. To select an image, click .

> **Note**
> Images are resized and the aspect ratio is adjusted to match. To see the original uploaded image , click **View in actual size**.

3. To remove the branding, click .
4. Click **Save**.