Consilium UniAgent-Webex Calling Onboarding Guide

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1 Introduction

This document provides the detailed steps of Consilium UniAgent-webex Calling onboarding.

1.1 About UniAgent-webex Calling

Consilium UniAgent-webex Calling for Webex Contact Center (WxCC) is a tool tailored to aid contact center in effectively managing Webex calls and integrates with CRM to populate data during incoming calls.

UniAgent™ (CTI Connector) provides contact center agents with an intelligent single-screen interface that merges contact center platform functionality into multiple compatible CRM products.

1.2 UniAgent-webex Calling Key features

- CRM Integration
- Screen pop
- One-click dialing
- Full telephony functions (Ready, Not Ready, Answer, Hold, Transfer, Consult and Conf)
- Call Logging

2 UniAgent-webex Calling Customer Onboarding

Pre-requisites:

1- Admin credentials for Control Hub access
2- At least one admin and one agent set up in Control Hub.
3- Agent accounts with Standard or Premium licenses in Control Hub.

3 UniAgent-webex Calling Installation Steps

Step-1: Locating UniAgent-webex Calling

- Access Webex App Hub.
- Search for Consilium UniAgent-webex Calling.

Step-2: Once Webex Calling setup is completed Proceed to setup The Hunt Groups

From the customer view in https://admin.webex.com, go to **Services**, and choose **Calling** > **Features**.

2 Click **Hunt Group** > **Create Hunt Group**.

3 In the **Basics** tab, enter the following information and click **Next**.

- **Location**—Select a location from the drop-down.

  A location is a container with a location-specific Calling configuration. See information.

- **Hunt Group Name**—Enter a name for the hunt group.
- **Phone Number** and **Extension**—Assign a primary phone number and/or an extension to the hunt group.

  If you leave the extension field blank, the system automatically assigns the la group. To modify it, see *Edit hunt group phone numbers* section.

- Slide the toggle to allow agents to use the hunt group number as the Caller ID.
- **Caller ID**—Assign the Caller ID for the hunt group. Caller ID is used for calls that are forwarded outside of this hunt group.
- **Language**—Select the hunt group language in the drop-down menu.

Create Hunt Group

○ ——— ○ ——— ○ ——— ○ ——— ○
Basics   Call Routing   Routing Settings   Select Agents   Review

Location
Assign your hunt group to a Location.

| Austria | ∨ |

Hunt Group Name
The name is used to default Caller ID and reference the hunt group later in the process.

| HUNT | × |

Phone Number
Assign the Hunt Group to a Webex Calling primary line. A phone number and/or extension is required.

| +43153410 | ∨ | and/or | Extension |

Allow agents to use hunt group number as caller ID
🔵

Caller ID
Caller ID is used when call forwarding is enabled and calls are forwarded out of this hunt group.

First Name   Last Name

| HUNT | × | | . | × |

Language
Select the language for audio announcements.

| English | ∨ |

Cancel   N...

In the **Call Routing** tab, choose one of the following options and click **Next**.

- **Circular (Max 1,000 agents)**—This option cycles through all members after the last member that took a call. It sends calls to the next available hunt group member.
- **Top Down (Max 1,000 agents)**—Sends the call through the queue of members in order, starting from the top each time.
- **Longest Idle (Max 1,000 agents)**—Sends calls to the member that has been idle the longest. If they don't answer, proceed to the next member who has been idle second longest, and so on, until the call is answered.
- **Weighted (Max 100 agents)**—Sends call to idle members based on percentages you assign to each member of the hunt group (up to 100%).
- **Simultaneous (Max 50 agents)**—Sends calls to all members in a call queue at once.

For the Hunt group with Simultaneous ring setting, when another user in th indication in the CallReleasedEvent.

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You can check the **Advance after a set number of rings** check box and use the drop-down to select the number of rings to apply to your call routing choice, if necessary.

In the **Routing Settings** tab, you can enable one or more of the following options if necessary and click **Next**.

- **Advance when busy**—The hunt group won't ring members when they are on another call, and advances to the next member in the hunt group. If the member has call waiting enabled and the call is advanced to them, then the call waits until the member becomes idle again.
- **Forward after a set number of rings**—Unanswered calls after a defined number of rings forwards to a designated number.
- **Divert calls when unreachable**—Unanswered calls divert to a defined phone number. This could apply to phone calls that aren't answered due to a network outage, or all members of the hunt group are busy and the **Advance when busy** option is also enabled.

For users only using a mobile device, calls aren't diverted if there's a netw

Create Hunt Group

Basics — Call Routing — Routing Settings — Select Agents — Review

Select Call Routing Options

Advance when busy
When enabled, the hunt group won't ring agents when agents are on a call. Incoming calls will advance to the next agent. If a hunt group agent has call waiting enabled and the call is advanced to them, then the call will wait until that hunt group agent isn't busy.

Forward after set number of rings
If enabled, calls that go unanswered after a set number of rings are forwarded to a number you define.

Divert calls when all agents unreachable
If enabled, then calls that aren't answered are forwarded to a number you define. This could apply to calls that aren't answered due to a network outage, or because all the hunt group members are busy and the Advance when busy option is enabled.

Back   Next

6

In the **Select Agents** tab, search and add users, workspaces, or virtual lines to the call list and click **Next**.

Depending on the **Call Routing** option you chose, add information such as adding p
For circular call routing, drag and drop users, workspaces, or virtual lines in the orde

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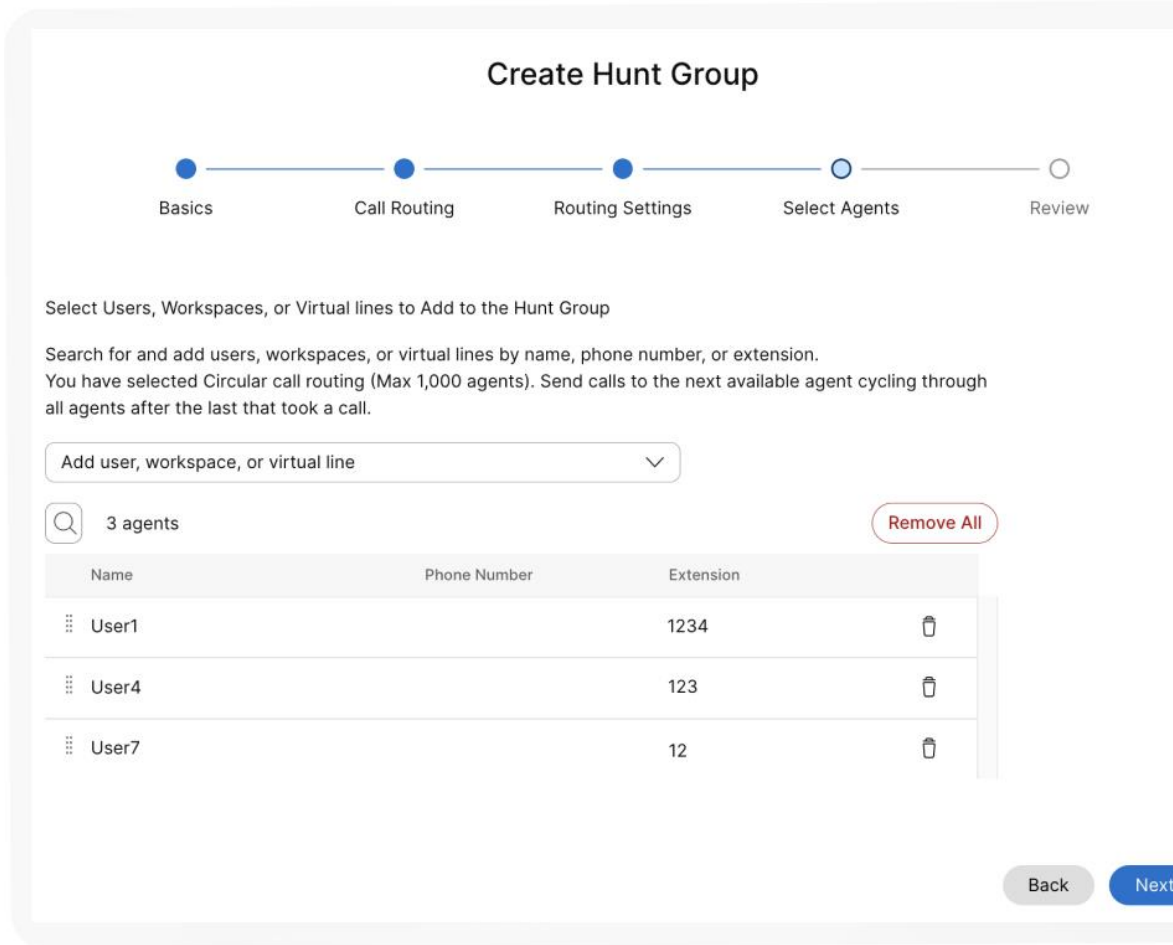
| **7** | In the **Review** tab, you get a chance to review your hunt group settings to make sure you've entered the correct details. |
| **8** | Click **Create** to create the hunt group. |

Watch this video demonstration on how to create a new hunt group in the Control Hub.

Disable a hunt group

With this procedure, you can disable a previously created hunt group.

1	From the customer view in https://admin.webex.com, go to **Services**, and choose **Calling > Features**.
2	Click **Hunt Group**, and then select the hunt group to disable from the list.
3	In the side panel, click the toggle **Enable Hunt Group** to **off** to disable the hunt group.
4	Click **Save**.

Edit hunt group general settings

Edit the language and Caller ID for each hunt group.

1	From the customer view in https://admin.webex.com, go to **Services**, and choose **Calling** > **Features**.
2	Click **Hunt Group**, and then select the hunt group you want to edit.
3	In the side panel, beside **General Settings**, click **Manage**.
4	View or edit the **Language** from the **Language** from the drop-down.
5	View or edit the **Time Zone** from the **Time Zone** drop-down.
6	View or edit the **Caller ID**. Caller ID is used when call forwarding is enabled and calls are forwarded out of this
7	Click **Save**. **Hunt Group 1** Cancel Location Location 1 Language Select the hunt group language. This field is required by government regulation. English ▽ Time Zone America/Phoenix ▽ Caller ID Caller ID is used when call forwarding is enabled and calls are forwarded out of this hunt group. First Name Last Name Hunt ✕ Group ✕

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Edit hunt group phone numbers

Edit phone numbers, alternative numbers, and assign distinctive ring patterns for hunt groups in Control Hub.

1 From the customer view in https://admin.webex.com, go to **Services**, and choose **Calling > Features**.

2 Click **Hunt Group**, and then select the hunt group to edit.

3 In the side panel, beside **Phone Number**, click the number displayed.

4 Edit the **Phone Number**, **Extension**, **Alternative Numbers** and **Distinctive Ring Patterns**.

If you've left the extension field blank when creating the hunt group, the system autom an extension for this hunt group.

Slide the toggle to allow agents to use hunt group number as the Caller ID.

BF NEW

Can

Phone Number
+13169998080

Extension
10- 7777

Allow agents to use hunt group number as caller ID

Alternate Numbers
Add alternate numbers using the lookup field. There is a maximum limit of 10 numbers.
Select a number

Distinctive Ring Pattern
Identify calls coming from specific phone numbers by assigning that number a distinctive ring pattern.

Phone Number	Ring Pattern	
+13169998067	Normal	
+13169998071	Normal	

You can have up to 10 alternative numbers.

5 Click **Save**.

Configure agent settings for user

Before you begin

- The Control Hub administrator enables the phone number to use as the outgoing phone number for the agents in the call queue/hunt group.

- On enabling the phone number, the administrator can set the agents outgoing phone number with the specific queue/hunt group CLID as per Persistent Configuration.

- The agents can also set a Temporary CLID Configuration by using the FAC code #80 to use the call queue/hunt group phone number as the CLID displayed for the outgoing call or #81 for outgoing default caller ID as the phone number displayed as CLID".

1	From the customer view in https://admin.webex.com go to **Management > Users**.
2	Select a user that you want to configure the agent setting for.
3	Select **Calling** and choose **Agent Settings**.
4	Select the **Agent Caller ID**. You can set the agent caller ID to either the agent's own caller ID or a specific queue/hunt group.
5	Configure the agent call queue/hunt group ID from the following options: • **Configured Caller ID**—The caller ID which is already configured to the agent. • **Call queue or hunt group caller ID**—Search by number or queue name and select the Call queue or hunt group Caller ID from the drop-down list When the agent you've selected isn't part of the call queue or hunt group,

Configure call forwarding for a hunt group

1	From the customer view in https://admin.webex.com, go to **Services**, and choose **Calling > Features**.
2	Click **Hunt Group**, and then select the hunt group to edit.
3	In the side panel, click **Call Forwarding**.
4	Toggle the **Call Forwarding** feature on.

5	Choose from one of the following options: • **Always Forward Calls**—Always forward calls to a designated number. • **Selectively Forward Calls**—Forward calls to a designated number, depending on criteria rules. If you choose Selectively Forward Calls, you need to have at least one ru
6	Assign the number you want to forward calls to. If you have chosen **Always Forward Calls**, click **Save**. Hunt Group 1 Cancel Sa **Call Forwarding** Call Forwarding is a feature that allows the user to redirect the incoming call to another number based on schedules or preference. ● Always Forward Calls All incoming calls are forwarded to this number. Q 1234 ✕ ☑ Send to voicemail ○ Selectively Forward Calls ⓘ When choosing **Always Forward** or **Selectively Forward**, check the **Send to Voicem:** The **Send to Voicemail** check box is disabled when an external number is entered.
7	For **Selectively Forward Calls**, create a rule by clicking **Add When to Forward** or **Add When Not to Forward**.

8	Create a **Rule Name**.
9	For **When to Forward**, select a **Business Schedule** and **Holiday Schedule** from the drop-down menu. It's mandatory to create a new rule specific to holidays.
10	For **Forward To**, select at least one option from **Default Phone Number** or add a **Different Phone Number**.
11	For **Calls From**, select **Any Number** or **Selected Numbers** with at least one option from the following: • **Any Number**—Forwards all calls in the specified rule. • **Any Private Numbers**—Forwards calls from private numbers. • **Any Unavailable Numbers**—Forwards calls from unavailable numbers. • **Add Specific Numbers**—Forwards calls from up to 12 numbers that you define.

Add When to Forward

Call Forwarding Selective Details
Rule Name

00-Open

When To Forward
Calls will be forwarded according to the schedule set here.
Both Business Hours Schedule and Holiday Schedule must be met for the Selective Forward Calls: Forward & Do Not Forward rules to apply.

Business Hours Schedule
Every Day All Day

Holiday Schedule
None

Forward To
Enter the number that your calls will be forwarded to.
○ Default Phone Number
● Different Phone Number   1234

Calls From
Calls from the number(s) defined here will be forwarded.
○ Any Number
● Selected Phone Numbers
    ☑ Any Private Numbers
    ☑ Any Unavailable Numbers
    Add Specific Numbers
    Enter phone number   Add   You can add upto 12 numbers
    123456 ×

Calls To
Calls to the number(s) defined here will be forwarded.
1234 (Primary)

Cancel   Save

12 For **Calls To**, calls are forwarded when a call is received by a number or alternate number in your organization that you define.

13 Click **Save**.

The rules created for the selectively forward calls are processed based on the following criteria:

- The rules are sorted in the table by rule name character. Example: 00_rule, 01_rule, and so on.

- The "Not to Forward" rule always takes precedence over the "Forward" rule.

- The rules are processed based on the order they are listed in the table.

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- You can create multiple rules. However, if a rule is satisfied, the system no longer checks the next rule. If you want the specific rule to check first, we suggest that you update the rule name with numbers. For example: If you want the holiday rule to check before the business closed hours rule, then name the rule as 01-Holiday and 02-Closed.

To know more about the basic functionality and examples of the selectively forward call, see Configure Call Forwarding Selective for Webex Calling.

What to do next

Once a rule is created, you can enable or disable a rule using the toggle beside the rule in the table.

You can also change or delete a rule at any time by clicking **Edit** or 🗑 to delete.

Enable Rule	Rule Name	Rule Type	Incoming Calls From	Incoming Calls To	Actions
🔵	00-Open	Not Forward	All calls	Any Number	Edit 🗑
🔵	01-Holiday	Forward	All calls	Any Number	Edit 🗑
🔵	02-Closed	Forward	All calls	Any Number	Edit 🗑

⊕ Add When to Forward   ⊕ Add When Not to Forward

Add or delete users, workspaces, and virtual lines in an existing hunt group

1 From the customer view in https://admin.webex.com, go to **Services**, and choose **Calling > Features**.

2 Click **Hunt Group**, and then select the hunt group to edit.

3 Beside **Agents**, click **Manage**.

4 Click the **Add User or Workspace or Virtual Line** drop-down and select the users, workspaces, or virtual lines that you want to add.

You can delete hunt group members by clicking 🗑 .

5 Click **Save** when you've made your changes.

Edit hunt group call routing pattern

Change the pattern of your existing hunt group from the options available.

1	From the customer view in https://admin.webex.com, go to **Services**, and choose **Calling > Features**.
2	Click **Hunt Group**, and then select the hunt group to edit.
3	Beside **Call Routing Pattern**, click **Manage**.
4	For **Call Routing**, edit the following options.

> If you change your call routing pattern from a pattern that accommodates 1,000 hunt g
> 50 members, only the first 100 or 50 members are kept. You're asked to confirm this

- **Circular (Max 1,000 agents)**—This option cycles through all members after the last member that took a call. It sends calls to the next available hunt group member.
- **Top Down (Max 1,000 agents)**—Sends the call through the queue of members in order, starting from the top each time.
- **Longest Idle (Max 1,000 agents)**—Sends calls to the member that has been idle the longest. If they don't answer, proceed to the next member who has been idle second longest, and so on, until the call is answered.
- **Weighted (Max 100 agents)**—Sends call to idle members based on the percentages you assign to each member of the hunt group (up to 100%).
- **Simultaneous (Max 50 agents)**—Sends calls to all members on the call queue at once.

5	Click **Add User or Workspace or Virtual Line** to edit the list of agents.
6	Click **Save**.

Edit hunt group call routing options

1	From the customer view in https://admin.webex.com, go to **Services**, and choose **Calling > Features**.
2	Click **Hunt Group**, and then select the hunt group to edit.
3	Beside **Call Routing Options**, click **Manage**.
4	Use the toggles to set each of these features **on** or **off**.

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- **Advance after set number of rings**—When turned on, a hunt group member won't receive a notification that a call is queued to them when on a call, and advances to the next member after a select number of rings. When turned off, a member receives a notification that a call is queued, but advances to the next member after a select number of rings.
- **Advance when busy**—The hunt group won't ring members when they are on another call, and advances to the next member in the hunt group. If the member has call waiting enabled and the call is advanced to them, then the call waits until the member becomes idle again.
- **Forward after set of rings**—Unanswered calls after the defined number of rings forward to a designated number.
- **Divert calls when unreachable**—Unanswered calls divert to a defined phone number. This could apply to phone calls that aren't answered due to network outage, or all members are busy and the **Advance when busy** option is also enabled.

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