



Consilium UniVRM Onboarding Guide

Version 1.04

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1 Introduction

1 Introduction

This document provides the detailed steps of Consilium UniVRM onboarding and flow details.

1.1 About UniVRM

Consilium UniVRM™ (Virtual Relationship manager) gets in touch with their existing customers regularly for support of existing services, upselling and service feedback. VRM is designed to align agents to contact list so that a preview call gets initiated from that agent to the contact to whom its assigned.

1.2 UniVRM Key features

- Collect and store unique customer identifiers
- Adapt to diverse business hours, and time slots for callback scheduling
- Handle callback requests from various channels
- Allows campaign level configuration for enabling VRM Campaign

2 UniVRM Customer Onboarding

Pre-requisites:

- Admin credentials needed for setting up the connector in appHub and setting the sample flow in flow Designer.

3 UniVRM Installation Steps

Step-1: Locating UniVRM

- Access Webex App Hub.
- Search for Consilium UniVRM.

--UniVRM Setup to be done by Consilium on Cloud -

- Navigate to management portal > Routing > Flows > Import > SampleVRMFlow.json
Click > save and deploy.

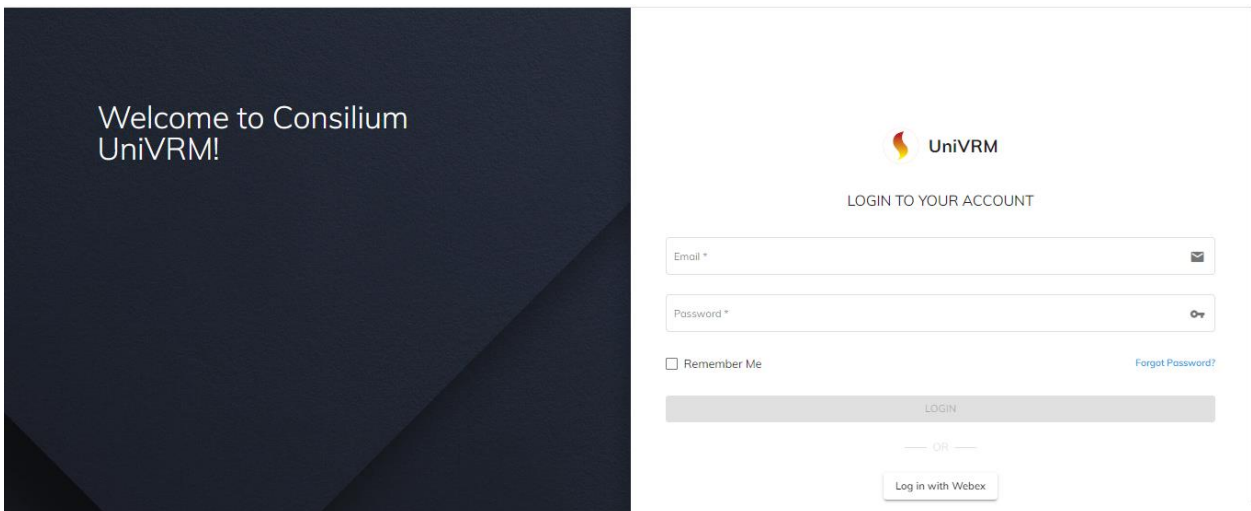
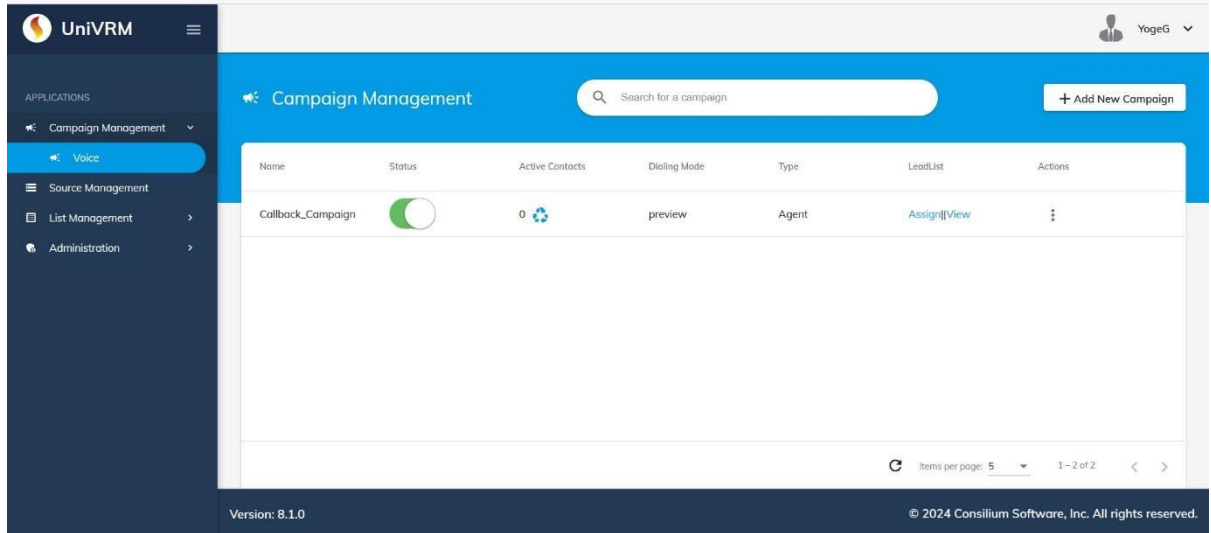
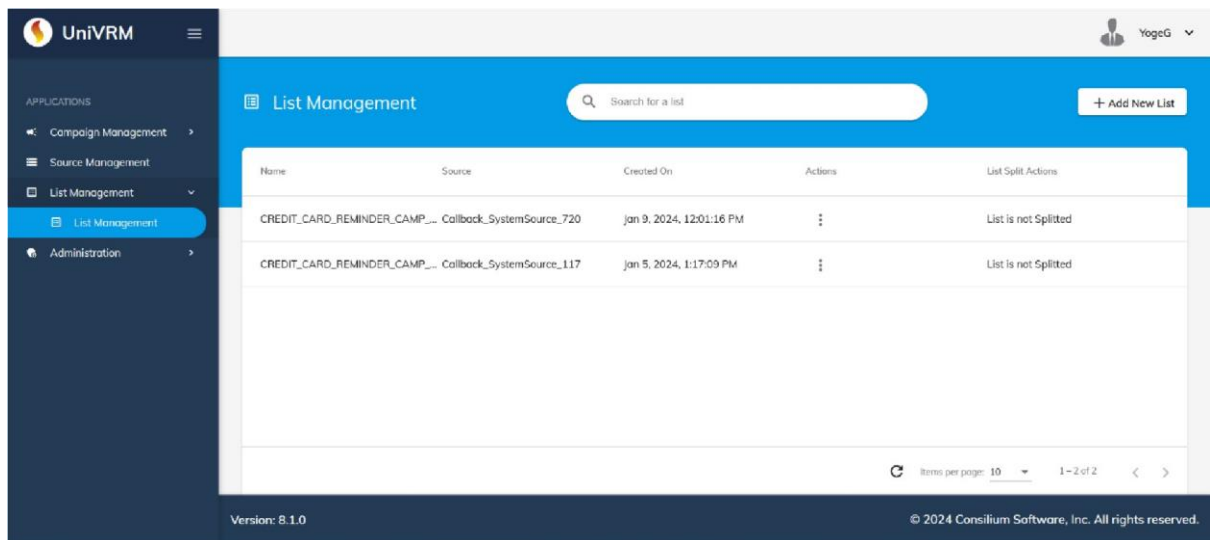


Figure 1: The UniVRM login page serves as the entry point to access the platform, requiring users to provide their Webex credentials for authentication and secure access to UniVRM's features and services.

Consilium UniVRM Onboarding Guide for webexCC

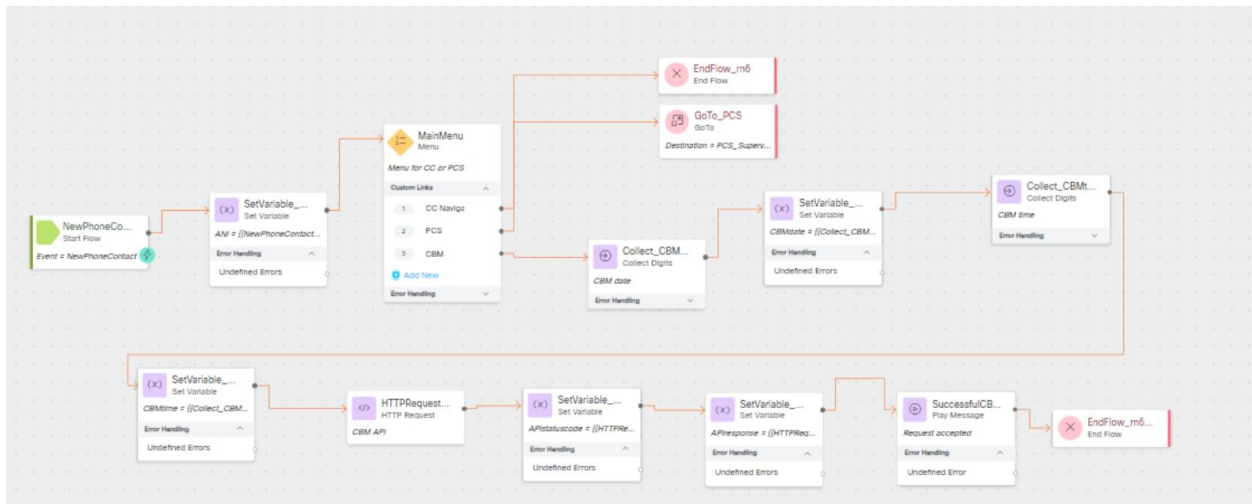


- Figure 2: UniVRM Management page, providing a user-friendly interface for configuring settings related to Voice.



- Figure 3: The UniVRM List Management page offers a robust interface for configuring list for dialing.

4 Sample flow for UniVRM



Here's a step-by-step documentation of the flow:

1. **New Phone Contact Event:** The flow starts with an event trigger named "NewPhoneContact." This indicates that the process begins when a new phone contact is created or identified.

2. **Set Variable (API):** After the initial event, a variable is set via an API call, possibly to capture or define parameters related to the new phone contact.

3. **Main Menu:** The flow then progresses to a "MainMenu," to be a decision point where the user can choose between different paths:

-VRM – Virtual Relationship Manager

5. **Set Variable (CBM Date):** Concurrently, another path sets a variable related to "CBMDate," which may be a date associated with the CBM option chosen from the main menu.

6. **Collect CBM Digits:** Following the CBM path, the system collects digits, likely as input from a user, which could be related to the CBM service.

7. **HTTPRequest (CBM API):** A parallel action involves an HTTP request to a UniVRM API, suggesting that the system is communicating with an external service or database.

8. **SetVariable (APIStatusCode):** The status code from the HTTP request is captured in a variable, which is typically used to determine the success or failure of the request.

9. **Collect CBM Digits (Again):** The CBM digits are collected again, perhaps as a confirmation or as a step in a multi-stage input process.

10. **SetVariable (APIResponse):** The response from the CBM API is stored in a variable, possibly for further processing or decision-making.

11. **Successful CBM:** If the CBM process is successful, a message is played, which could be a confirmation to the user.

12. **End Flow:** The process ends with an "EndFlow" action for two branches: one that directly ends after the PCS path and another that ends after a successful CBM operation.

Throughout the flow, there are error handling paths for undefined errors, indicating that the system has mechanisms to manage unexpected or unhandled issues.

Variables in the Flow:

- ANI
- VRMTime - Scheduled Time for Callback
- VRMDate - Scheduled Date for Callback
- AgentExt - Agent Ext

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