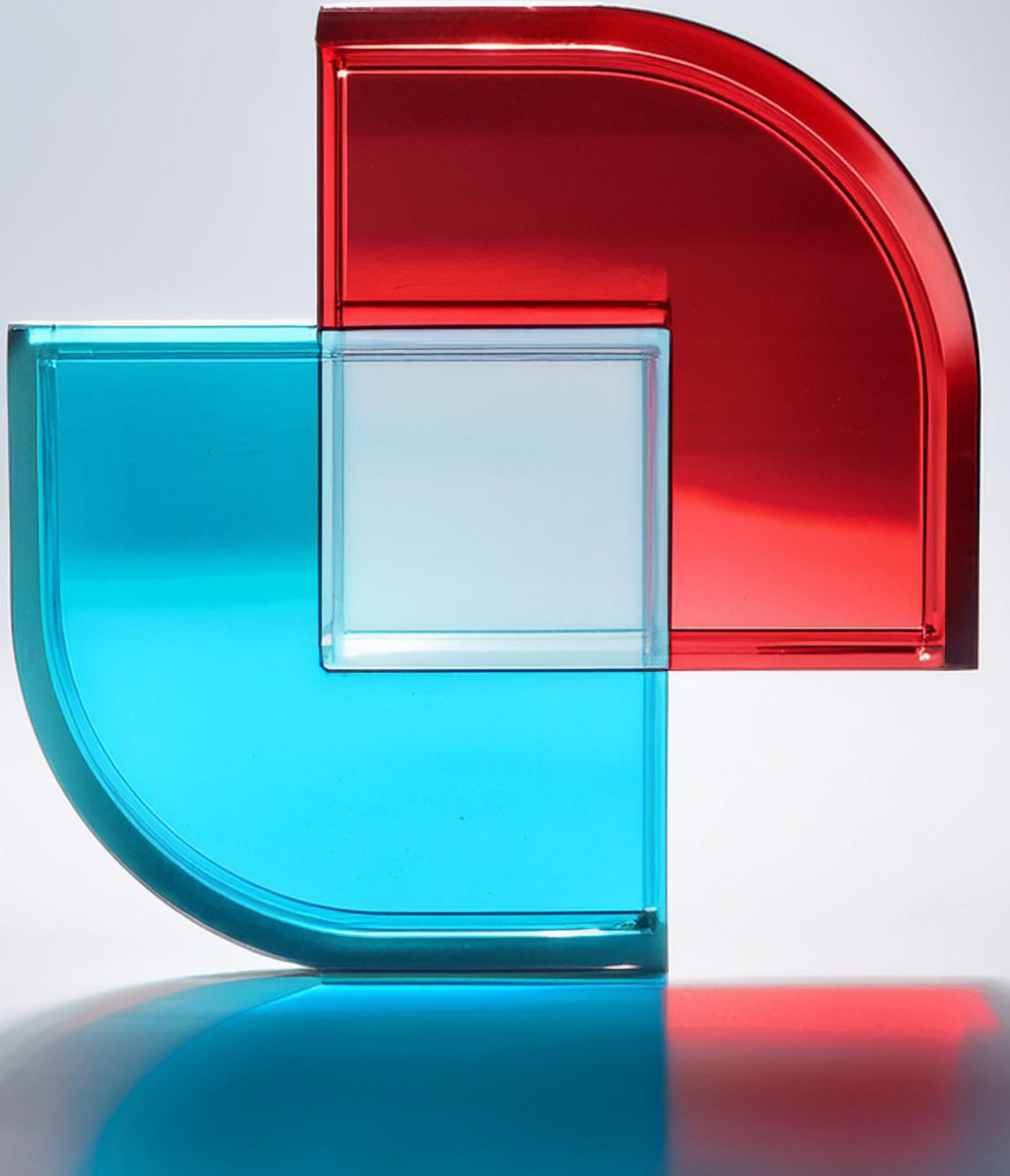
daktela

Remote Onboarding



Practice Book

Section 1: **Users**

1. Create rights and accesses for a new Admin
   - **a)** Admin will have Access and Rights to everything
   - **b)** Admin user will be able to call without a queue

2. Create a new user called "Admin", assigning them Accesses and Rights created in the previous step.
   - **a)** Admin's calls won't be recorded.
   - **b)** Admin's line number will be "900".
   - **c)** They will not have a Device assigned yet

3. Create further Users according to this table.

# OF USERS	USER TYPE	DESCRIPTION	ACCESSES	RIGHTS
1	Reception	User will only make occasional phone calls with minimal GUI interactions	CRM - Contacts and Accounts (access and ability to read)	Inbound and Outbound Reception Queues + calling without a Queue
2	Trader - Sales	A user who will be finishing (closing) the sales opened by Sales agents and a consultant for existing clients	CRM - Contacts and Accounts (everything), Tickets	Sales Queues and Tickets + Rights only for sales agents, Pauses
2	Agent - Sales	A user who will be finishing (closing) the sales opened by Sales agents + consultant for existing clients	CRM - Contacts and Accounts (Access and Read), Campaigns, Record Types (Read)	Campaign Queues + only sales Users
3	Agent - Support	Passive agent– experienced support for our Customers (they have an excellent knowledge of our product)	All channels (Tickets, Webchats, etc.), CRM - Contacts and Accounts (everything)	To passive queues, Tickets (all except sales), all channels, cannot see sales Agents (can see Traders), Pauses
1	TL - Sales	Sales Team Leader – in charge of sales Traders as well as Agents	CRM, Application RT, Statistics, Listings, Application Wallboards, Records, Tickets	Sales Operations, Queues, Tickets, can call without a Queue
1	TL - Support	Support Team Leader (passive CC) with overview of all CC operations	CRM, Application RT, Statistics, Listings, Application Wallboards, Records, Tickets	All the support operations, Queues and Tickets, can call without Queue

4. Create CRM forms for Accounts and Contacts according to these tables:

a) For Contacts:

ITEM	TYPE	MULTIPLE	MANDATORY
Address	Address	✗	✗
Email	Email	✓	✗
WWW	URL Address	✓	✗
ID number	Text	✗	✓
VAT	Text	✗	✓
Segment	Selectbox	✗	✓
Note	Text area	✗	✗

ITEM	Type	Multiple	Mandatory
Email	Email	✓	✗
Phone	Phone	✓	✗
Primary Contact	Checkbox	✗	✓
Note	Text area	✗	✗

5. Manually create 1 Account and 1 Contact and assign the new Contact to the new Account.

6. Create 2 files, from which you will then import contacts and accounts to your PBX.
Import three Accounts - name the first one 'Daktela s.r.o.' and name the remaining two however you wish.
   - **a)** Assign 3 Contacts to the first Account.
   - **b)** Assign 1 Contact to the second Account.
   - **c)** Don't assign any Contacts to the third Account.

Section 2: **Helpdesk, Email and Tickets**

1. Create a new HD tag (helpdesk) in the Globals.

2. Create an SLA called "SLA Support" and an SLA called „SLA Sales" according to the hours in the tables.

a) SLA Support

PRIORITY	RESOLUTION	REACTION
Low Priority	72	12
Mediom Priority	48	6
High Priority	2	2

b) SLA Sales

PRIORITY	RESOLUTION	REACTION
Low Priority	144	24
Mediom Priority	72	8
High Priority	16	6

3. Create two Categories:
- **a)** The first category will be called: Support
- **b)** The second category will be called: Sales
- **c)** Assign the corresponding SLAs to these categories

4. Create a new mailbox using any service provider you like.

5. Create a new email Queue
- **a)** Connect this queue in your PBX to the email box you have just created
- **b)** The category will be set to support

6. Set the Rights to the newly created Queue
- **a)** Follow the table in the first Section
- **b)** Only Sales agents and both Team Leaders will be entitled to the Sales and Queue Category
- **c)** Only passive CC Agents and both Team Leaders will be entitled to the Support and Queue Category
- **d)** Admin has all the Rights

7. Create Ciews, which you will then distribute to users as follows:
- **a)** **My tickets**: Open or waiting tickets, where the owner (= user) is the agent who is logged in
- **b)** **All**: All tickets from the categories to which the user is entitled
- **c)** **Not processed yet**: Tickets in the appropriate category that are open or waiting and the owner (= user) is empty
- **d)** **Processed**: Tickets in the relevant (sales / support) category that are open or waiting and the owner (= user) is NOT empty
- **e)** **Processed subfolders according to OP**: Subfolders of the "processed view", where for each agent of the respective team (sales / support) there will be its own view, which will display tickets that are open or waiting and the owner (= user) is a specific agent of the given TL.
- **f)** **Urgent**: Support tickets that are open or waiting and have a „high" priority
- **g)** **Daktela**: Sales tickets that are open or waiting and the company is "Daktela s.r.o"

8. Update views for agents and TLs, according to the table below:

TRADERS- SALES	AGENTS – SUPPORT	TL - SALES	TL - SUPPORT
My tickets	My tickets	My tickets	My tickets
Sales not processed	Support not processed	Sales not processed	Support not processed
Sales processed	Support processed	Daktela	Urgent
All	All	Sales processed	Support processed
-	-	Processed subfolders according to agent	Processed subfolders according to agent
-	-	All	All

9) Make sure everything you've set up so far works as it should
- **a)** Try incoming and outgoing email
- **b)** Try working with Tickets
- **c)** Try changing the category on the ticket
- **d)** Test the correctness of views for TL

10. Set incoming email routing
- **a)** The email (Ticket), which will have „offer" or „demand" included in subject will be assigned to the category „Sales"
- **b)** The email (Ticket) that will have „does not work" included in the subject will be assigned to the category „Support" and a high Priority

11. Create a signature template
- **a)** The template will be assigned to the email queue
- **b)** The name in the signature will be the name of the currently logged in operator (variable)

12. Create further 2 templates
- **a)** The first template will be „Demand response"
  - With any text content (e.g. Lorem ipsum)
  - The template must be structured (line spacing, font selection, etc.)
- **b)** The second template will be „Problem Specification Request"
  - With any text content (Lorem ipsum)
  - The template must be structured (line spacing, font selection, etc.)

13. Verify the functionality of the templates by sending an email

14. Set up Macros
- **a)** Create a green macro button that closes the ticket, saves it and switches back to the ticket list view
- **b)** Create a blue button that only TLs can see and sets the, changes the category to sales and switches you back to the Ticket list

Section 3: **Webchat and Chatbot**

1. Create 2 webchat queues - "Webchat Sales" and Webchat Support"
   a) Assign Rights to these Queues for Users according to the table from the 1st entry "T01"
   b) Choose a login type other than none
   c) In the queue settings, add notification email you created in the previous chapter (T02), where you will receive information about missed activities
   d) Set up this email as a tool of resolving missed activities as well

2. Create a template called „Personalized greeting"
   a) This template will be used for live chats with customers
   b) Use the name of the logged in agent as the Title

3. Create 2 terminations
   a) Terminate the chat in the decision tree, without the assigned queue
   b) Terminate the chat "away from work", with the cause of shutdown „outside working hours"

4. Create a connector with a name: Webchat connector DaktelaGH
   a) The full agent's name and icon must be displayed for each message in the chat
   b) Mandatory entry to the chat will be: Name; Email
   c) Chat will open after 15 seconds
   d) Set the greeting after 30 seconds so that the title of the bubble is "Do you need advice?" And the text „We will be happy to answer any questions"
   e) Set the support webchat queue as a target/goal
   f) Set the design as you wish. The only condition is that it can't stay as the original one
   g) Save and apply configuration changes

5. Test it!
   a) Open the connector again and click on the button: „Get code"
   b) Open a live editor like https://www.w3schools.com/html/tryit
   c) Paste your copied code and run it.
   d) Test how your Webchat works from the Customer's point of view
   e) Back in Daktela, switch to any support Agent and connect to the Device

6. Create a time group
   a) Create a group named "DRO CC Working Hours"
   b) Working hours will be from 0900 do 1700, every day during the whole year
   c) Implement your country's preset holidays

7. Create a time condition
   a) Create a condition named „Webchat working hours", select a time group „DRO CC Working Hours"
   b) Targets/Destinations:
      - If you are open: Queue – Webchat Support
      - If you are closed: Termination – Terminate the Chat "away from work"

8. Now set the newly created Time condition as the target in the condition. Set the greeting messages in the connector for both online and offline modes.

Section 4: **PBX**

1. Create 2 SIP devices for Team Leaders
   a) TL Support
      - Name: TL Support
      - Device: 201
   b) TL Sales
      - Name: TL Sales
      - Device: 301

2. Assign the device to the right Users

3. Download and set up the SW phone
   a) Get the Daktela SW Phone from https://daktela.com/resources/documents
   b) Configure this new installed device on TL Support
   c) Check the status bar of the SW phone to verify that it was successfully connected to the PBX

4. Set up the channel/SIP trunk
   a) Name: DRO/SIP trunk
   b) Set up your channel according to the data that your trainer sent you via ticket

5. Set up outgoing routing
   a) All outgoing calls go through the channel you set up in the previous step
   b) The name will be: DRO_outgoing_routing_01

6. Log in as TL CC and try the outgoing call to the trainer's phone number
   a) Trainer will tell you the number
   b) Before you start calling, tell the trainer

7. Set up inbound routing
   a) The first number that was assigned to you for testing, direct (set up the aim/target) to the user: TL Support
   b) Name: GH_inbound_routing_01_TLSupport

8. Set up, apply and try the notification
   a) Create a voice recordings named: my_welcome
   b) If you can't record audio, you can create your own recordings using a free online text-to-speech tool, like this one here: https://ttsmp3.com/
   c) Upload this message to your PBX and name it: my_welcome
   d) Create a voice recordings named: my_awayfromwork
   e) Download the recording from our website or record one yourself
   f) Upload the message to your PBX and name it: my_awayfromwork
   g) Create two new announcements "My welcome" a "My awayfromwork" and use the corresponding system recordings from the previous steps
   h) Modify the incoming routing so that the "My welcome" recording will play first and then the Call will be routed to TL Support

9) Set up, apply and try IVR
   a) Upload it to your PBX named "My_IVR"
   b) Create a new IVR "DRO_My_IVR"
   c) When pressing number 1, the call would be routed to the TL Support user
   d) When pressing number 2, the call would be routed to the TL Sales user
   e) After Timeout, the IVR will be repeated 3 times
   f) If you press the wrong button, PBX will end the call.
   g) Adjust the incoming routings as follows:
      i) Firstly, the caller will hear: My Welcome
      ii) After that, the caller will go through our new IVR: "My IVR"
      iii) Then, the caller will be routed to a specific User according to the number he has pressed in the IVR
   h) Test both options
   i) The SW phone will still be linked to the TL Support User

10) Create and apply a new Time Condition
   a) Create a Time Condition: CC working hours including Bank holidays
   b) Use the Time Group you already created: DRO CC Working Hours

Section 5: **Passive Call Centre**

1. Create Inbound and Outbound call Queues for reception
   a) Title for inbound queue: "Reception - Inbound Queue"
   b) Title for outbound queue: "Reception - Outbound Queue"
   c) The User "Reception" must be fixed in both queues
   d) This User must also have the Static log in turned on

2. Use your mobile number as an external device and prepare the Routing
   a) Set up a new Inbound Routing and assign your second number to it (a number other than the one used for the "DRO_inbound_routing_01_TLCC" Routing) and route it to the newly created "Reception - Inbound Queue"
   b) Set the number you just assigned to the Routing as the identification for the "Reception - Outbound Queue"

3. Test the functionally of the setting - log in as "Reception" and try an Outbound call

4. Create inbound queues for Sales and Support
   a) Title for the Support Queue: "Support - Inbound"
   b) Title for the Sales: "Sales – Inbound"
   c) Turn Recordings on for both Queues
   d) Create an automatic login for Agents for the "Support – inbound" Queue:
      - Support Agent - Automatic login
      - Support Team Leader - Manual login
   e) Create an automatic login for agents for the "Sales – inbound" Queue:
      - Sales Agent - Automatic login
      - Sales Team Leader - Manual login

5. Create new Outbound Queues
   a) Title: "Outbound Queue for Sales + TL"
   b) Set login for all related Users as Automatic
   c) Set the outgoing number in this Queue to the one you used in the previous exercise: DRO_inbound_routing_01_TLCC
   d) For both inbound queues set up recording of missed activities with a 1-day display and with a call queue „Outbound queue for sales + both TL"

6. Create and set a pause
   a) Create your own pause with the title: "Coffee break"
   b) This break will be limited to a maximum of 15 minutes
   c) All agents will have the Rights to all of their Pauses

7. Set up an IVR for Sales and Support
   a) Use the already created IVR from a previous assignment in the PBX Practice section: DRO_My_IVR
   b) Change routing as follows:
      - First option: Support queue – inbound
      - Second option: Sales queue - inbound

8. Test it! Log into the PBX as a TL CC User and connect to your SW phone.
   a) Try working with the interface from the User's point of view: log in and log out from your Queues, view your List of devices, try your Pauses
   b) Review the settings in „My profile" and „Preferences" - allow desktop notifications and pop-ups
   c) Try Inbound as well as Outbound Calls (both Queues), including answering a Call and short conversation
   d) Try to not accept an Incoming Call it the „Support – Inbound" Queue and process it as a missed activity
   e) See how the display in the Realtime module changes when activating or deactivating a Pause or during Call handling
   f) Review the Calls and Activity listings and try to play a Recording of the Calls made, access Statistics and Reports

Section 6: **Active Call Centre**

1. Create a Call Script for the Manual Campaign, through which we will sell gardening work:
   a) Title: "Manual gardening work"
   b) Call Script will be divided into 2 sections:
      - First section: Name, Phone number, email, date of birth
      - Second section: 3 types of gardening work (checkbox), whether he/she wants to use premium services (selectbox) and 4 options according to the size of the garden (radio)
2. Create a Manual Campaign (Queue)
   a) Title: "Gardening work MANUAL"
   b) The Agent will have 30 seconds to select and read the Record and another 10 seconds after the Call to save the Form (if it exceeds this limit, the "Inactive" Pause will start)
   c) This Queue will be for:
      - Sales Agents (they will call from this queue)
      - Sales Team Leaders (will import the Records into the Campaign)
   d) Set Relations - assign this Queue to the Record from step 1.
   e) Create a Blacklist Database for this Manual Campaign named "Never call again"
   f) Import the Records you created using a Temeplate

3. Create a Call Script for the Progressive Campaign, through which we will sell televisions:
   a) Title: "Progressive Sale of Televisions"
   b) Records will be divided into 3 sections
      - First section: Name, phone number, email and date of birth
      - Second section: How many TVs does a customer want to buy (radio), color of the TVs (radio), the brand of TVs (selectbox), note (text)
      - Third section: This would show only if the customer wants to buy 2 or more TVs - color of the TV, the brand and note

4. Create 4 Statuses for the progressive campaign
   - "DRO T_Order"
   - "DRO T_Unable to reach" (with the possibility to call again)
   - "DRO T_Call later" (with the possibility to call again)
   - "DRO T_Unavailable" (with the possibility to call again)

5. Create a Progressive Campaign (Queue)
   a) Title: "TV sale Progressive"
   b) Working hours: "GH Working hours CC"
   c) The agent will have 5 seconds to select and read the Record, and after the Call another 30 seconds to save the Form
   d) A Dialer will set the Statutes from step 4.
   e) This Queue will be for:
      - Sales Agents (they will call from this queue and are logged in automatically)
      - Sales Team Leaders (will import the records to the campaign)
   f) Import the Records you created using a Temeplate
6. Create a Call Script for the Predictive Campaign, through which you will call the debtors who we want to persuade to repay the amount owed:
   a) Title: "Predictive debt recovery"
   b) The Records will be divided into 2 sections
      - First section: Name, telephone number, email, and date of birth
      - Second section: Will the contact (record/customer) repay the debt (radio), deadline for repaying the debt (date) and the payment method (selectbox).
   c) Deadline and the payment method will only show if the customer answered "Yes" to repaying the debt

7. Create 5 statuses for the predictive campaign
   - "DRO D_dept repaid"
   - "DRO D_dept not repaid"
   - "DRO D_dept unable to reach" (with the possibility to call again)
   - "DRO D_dept call later" (with the possibility to call again)
   - "DRO D_dept unavailable" (with the possibility to call again)

8. Create a Predictive Campaign (Queue) named "Debt collection PREDICTIVE"

- **a)** Working hours: "DRO working hours CC"
- **b)** The agent will have 5 seconds to select and read the Record and another 30 seconds after the Call to save the Form
- **c)** Dialer will set the Statuses from step 7
- **d)** This queue will be for:
    - Agents - sales (they can call from this queue and they will be logged in manually)
    - TL sales (will import the records to the campaign)
- **e)** Import the Records you created using a Template

9. Try it!

- **a)** Log into the Manual Queue and try to load the Records and call from this Queue
- **b)** Log into the Progressive Queue and try to load the Records and call from this Queue
- **c)** Log into the Predictive Queue, load the Records and call from this Queue