

UCONTACT

Transform your customer experience. Centralize all customer interactions on a unified platform and improve your contact center efficiency.

- Features
 - Feature
 - Feature Codes
- Profiles
 - Agent
 - Supervisor
- Voice
 - Voice Campaigns
 - Dialing Strategies
 - Flows Dialers
- Omnichannel
 - Ring Strategies
 - Webchat
 - Email
 - SMS / WAB
- Recordings
 - Sending to external storage
- Security
 - Considerations
 - ISO 27001
 - PCI Compliance

- Infrastructure
 - Architecture
 - Computer equipment

- guides
 - Conference Calls - ENG
 - Transfer calls - ENG

- Academy
 - The Agent's Profile
 - The Softphone
 - The Agent's Interface
 - The Unified Inbox
 - The agent Workspace
 - Training Agenda

- Q&A
 - How to create an agent

Features

Feature

Feature	Description	VOICE	OMNI
Core voice features			
Voice campaign management		YES	YES
Inbound campaigns	Deliver high-quality voice experiences through all inbound interactions.	YES	YES
Outbound campaigns	Deliver high-quality voice experiences through all outbound interactions.	YES	YES
Blended campaigns	Deliver high-quality voice experiences through all blended interactions.	YES	YES
Softphone	Start and/or pick up calls directly from uContact's native mobile & desktop softphone.	YES	YES
Multiple campaigns (at once)	Be active in more than one campaign at the same time.	YES	YES
Automatic Call Distribution (ACD)	Put your business in autopilot using uContact's native ACD software	YES	YES
Intelligent & Priority Routing	Intelligently route incoming calls to the most appropriate agent or department within your company.	YES	YES
Call Queuing	Route callers to the next available agent.	YES	YES
Virtual Hold (Queue Callbacks)	Allows callers to hung up and receive a call without losing their places in line.	YES	YES
Call recordings	Record & listen to interactions from all available channels.	YES	YES
Screen pop-up	Form appears automatically as soon as a call is finished	YES	YES

Wrap-up time	Time interval granted to the agent to manage calls after they ended.	YES	YES
Conference calling	Have a three-way conversation –and more!	YES	YES
Custom breaks	Assign different 'break' activities based on the agents' needs.	YES	YES
After-business hours & Holiday rules	Automatic & customizable notification when a call is executed outside campaign/business hours.	YES	YES
Estimated wait time	Callers are notified about the estimated time they have to wait before being attended by an agent	YES	YES
Disposition Management Category codes	Categorize call outcomes (occupied, not connected, blocked/wrong number, abandoned & others).	YES	YES
Call monitoring	Listen to calls to manage call quality and agent performance.	YES	YES
Auto-dialers		YES	YES
Predictive	Calls multiple numbers at once and connects the calls with the available agent when the client answers.	YES	YES
Powerdialer	Calls the client first but with a more real-time calculation of the overdial.	YES	YES
Preview	Calls the agent first and, based on his availability, and then transfers the call to the client.	YES	YES
Progressive	Assigns a client to a specific agent and he only interacts with him.	YES	YES
Reverse Progressive	Exclusive configuration of the Progressive dialer, but calls the client first.	YES	YES
Voice Broadcast (Press-1 campaigns)	Mass broadcast of prerecorded voice messages (surveys, notifications, and more).	YES	YES

Answering Machine Detection (AMD)	Automatic detection of voice mails & distinction between human and robotic voice.	YES	YES
List mixing	Assign dialers a specific dialing percentage or priority to different lists and maintain high contactability levels.	YES	YES
Automatic list recycling	Select contacts you wish to keep trying to reach and generate a new list that includes them.	YES	YES
Do-Not-Call Registry (DNCR) list management	Create a 'blacklist' and avoid dialing certain contacts	YES	YES
Voice automation		YES	YES
Interactive Voice Response (IVR)	Built with text-to-speech technology, allows computers to interact with human callers through voice commands	YES	YES
Text-to-Speech (TTS)*	Assistive technology that reads digital text aloud.	YES	YES
Automatic Speech Recognition	Converts an incoming human-spoken audio into text thanks to acoustic & language models.	YES	YES
Omnichannel features			
Unified Inbox	Meet customers in the digital channel of their choice, integrating all touchpoints in the same place.	NO	YES
Unified Notification Center	Receive new interaction notifications from all channels in the same notification bar.	NO	YES
Transfer interaction (to agents and/or groups).	Transfer any interaction from one agent, group or campaign to the other.	NO	YES
Disposition Management Category codes	Categorize digital interaction outcomes (occupied, not connected, blocked/wrong number, abandoned & others).	NO	YES

Post-interaction Satisfaction Surveys	Receive customer feedback at the completion of all interactions.	NO	YES
Omnichannel Interaction Recordings	Audio & screen recordings of all digital interactions.	NO	YES
Bot Automation	Automate all digital interactions using uContact's native & customizable Bots.	NO	YES
WhatsApp Business		NO	YES
Official WhatsApp Business Provider Integration*	Officially integrated to several Facebook-certified WhatsApp Business providers (Gupshup, Infobip, Wavy & more).	NO	YES
Inbound WhatsApp Business Campaigns	Receive & answer interactions directly from uContact, just as you would from the app.	NO	YES
Pre-Approved Templates for Outbound Campaigns	Use WhatsApp Business-approved templates in your outbound campaigns	NO	YES
Facebook & Facebook Messenger		NO	YES
Facebook wall & posts	Receive & handle notifications each time the company has been mentioned in a comment/post.	NO	YES
Facebook Messenger	Receive & answer direct messages from your Facebook page directly from uContact	NO	YES
WebChat		NO	YES
Audio calls with WebRTC	Start and/or answer audio calls directly from your website using Web RTC technology.	NO	YES
Video calls with WebRTC	Start and/or answer HD video calls directly from your website using Web RTC technology.	NO	YES
Share screen	Share your screen directly from the WebChat.	NO	YES
Request screen	Request your client's screen.	NO	YES

Email		NO	YES
Bulk & One-to-One email campaigns	Send emails to one or multiple recipients at one time.	NO	YES
Send & receive attachments	Send & receive files securely with File Transfer Protocol (FTP).	NO	YES
Customizable email templates	Use one of uContact's email templates or easily create/design your own.	NO	YES
SMS & MMS		NO	YES
Bulk & One-to-One SMS campaigns	Send SMS campaigns to one or multiple recipients.	NO	YES
Multimedia Messaging Service (MMS)	Send multimedia messages to one or multiple recipients.	NO	YES
Low-code Development Tools			
Workflow Designer	Build your own workflows with uContact's low-code programming workflow designer.	YES	YES
Report Creator & Designer	Use a standard data capturing form, integrate your own CRM, or build your own forms from scratch.	YES	YES
Data-capturing Form Designer	Use one of uContact's +200 available reports or use our low-code report designer to create your own.	YES	YES
Workforce Management			
Omnichannel Recordings	Record interactions from all digital channels.	NO	YES
Call Recordings	Record inbound and/or outbound calls.	NO	YES
Screen Recordings **	HD screen recordings	NO	YES
Agent Coaching (Spy, Whisper & Real-Time feedback)	Listen to your agent's conversations in real-time and whisper feedback in real-time.	NO	YES
Satisfaction Surveys	Receive customer feedback at the completion of all interactions.	NO	YES
Reporting & Analytics			

Real-Time Dashboards	Omnichannel & real-time monitoring of daily performance.	YES	YES
Historical Reporting	Generate & access reports with information from the first day using uContact	YES	YES
Graphical Alerts	Receive graphic & automatic alerts whenever something happens in your Contact Center.	YES	YES
Omnichannel Reports	Report generation of statistics from all integrated channels.	YES	YES
Standard & Customizable Reports	Use one of uContact's +300 preset reports or tailor-make your own.	YES	YES
Schedule Reports	Schedule report generation for a date and time of your convenience.	YES	YES
Real-Time Supervision	Be aware of what's happening in your Contact Center at all times and in real-time.	YES	YES
Survey Reports	Report the answers of the satisfaction surveys sent.	YES	YES
Report Export (PDF, XLS, CSV).	Export reports in the format of your choice.	YES	YES
Gamification			
Daily Customizable Games & Challenges	Set daily goals and challenges to keep motivation levels up.	NO	YES
Objectives by agent, group and/or area	Set objectives to your agents, groups and departments in your Contact Center.	NO	YES
Rewards & Recognitions	Give badges, rewards and/or monthly recognitions to your top-performing agents or groups.	NO	YES
Avatars	Each agent or supervisor has its own customizable avatar.	NO	YES

Rankings	Real-time ranking of your agents according to their performance in games and challenges.	NO	YES
Security & Quality Monitoring			
Quality Monitoring	Formally score, evaluate & report in agent calls to measure success.	YES	YES
Standard COPC	Instrument to measure performance and quality of all interactions.	YES	YES
Encryption	All interactions are end-to-end encrypted to avoid unauthorized access to our clients' data.	YES	YES
Permissions per user-type	Each license has access to specific features and permissions.	YES	YES
General Technical Features			
CRM Lite	Powerful CRM system (native or integrated) for successful campaign management.	YES	YES
100% Browser-based	Access uContact directly from a browser, no app download or plug-in install needed.	YES	YES
Home Agents	Thanks to its Web RTC technology, agents can access uContact anywhere.	YES	YES
Customizable Breaks Status	Agents can change their status activity in real-time.	YES	YES
Multiple Languages	English, Spanish, Portuguese & Italian.	YES	YES

Feature Codes

Introduction

This manual is oriented to know the operation of the telephone switchboard and PBX Integra processes and configuration management.

Is orient to resolve all operational functions of a traditional PBX adding administration and management modules with new technologies.

Added to the basic functionality, extending a series of quick options and services, integrated into one product, which will enable the management of multiple communication channels with a single centralized device.

Basic Functions

Pickup

Allows calls from other extensions be picked up in the following ways:

*8	Pick up a group call (section)
* + XXX	Pick up an extension call determined by XXX

External Calls

Make calls out (depending on the permissions of the user), permissions are associated to each extension:

- Make local calls.
- Make international calls.
- Make calls to cellular phones.
- Make internal calls.

9 + number	External call (according to internal permissions)
*25 or	External call with recall possibility

Deviations

Deviations are possible based on the state of internal or directly based on a specific user requests.

*62	Enable deviation when the extension is busy
*63	Disable deviation when the extension is busy
*64	Enable deviation when the extension is not available
*65	Disable deviation when the extension is not available
*72	Enable total deviation of the extension.
*73	Disable total deviation of the extension.
*66	Check voicemail box
*67	Erasing all messages in voicemail
*88	Activation on demand Call Recording of an extension

Deviation can be made:

- To other extension (ej: 214).
- To an external number dialing “9 + number” (ej: 94013864).

Telephone status

Set the phone in certain states if the user does not want to have certain services, or not be bothered.

*78	Activate the "do not disturb" mode
*79	Deactivate the "do not disturb" mode
*91	Activate voicemail
*92	Disable voicemail

Others

Check states or information.

*50	Extension Status (Indicates the services are activated)
*75	Says my extension number

Operative.

Making a call

For external calls you have to type:

9 +4013864

9 +16

Dial all together.

Internal calls: Internal calls are made directly, for example: 205 or 207.

Note: For IP phones, after dialing can be marked "send" or "#" to send the call.

Pick up another extension call

* 8. Dialing * 8 pickup calls in the same group.

* 100 to lift the extension 100 if is ringing.

Simple transfer or Blind Transfer (##)

Case: A is talking to B and A wants to transfer the call to extension C, without asking if

C wants to take the call.

Steps:

- When A and B are talking, A mark # #, the PBX plays "Transfer" and A digits the extension of C. After A digits the extension number B is transferred to C.
- B is in communication with the extension C, or listening the ring tone until C answers or not.
- If C does not answer the call is returned to the source.

Transfer with consultation or Attended Transfer (#0)

Case: A is talking to B and A wants to transfer the call to C, consulting if C wants to talk to B.

Steps:

- When A and B are talking, A dials # 0, the PBX plays "Transfer" and gives a dial tone so that the extension C is dialed. B waits on hold.
- A dials the extension of C and talk to C.
- If C wants to take the call, A must hung up so C and B get connected.
- If C does not want to take the call, A dials * or C Hangs up, this cuts communication between A - C while A keeps talking with B.

Call Parking

The PBX has the ability to put up calls. For example: you are talking to A and wants to talk to B but you do not know where B is, you can put up the call from A while B is found, is like letting someone wait in line for the caller.

Procedure to park:

- When talking with A #3 is dialed.
- The PBX indicates the position where It's the call. Example, the PBX says: 701. So, that was the call parked at position 701.

Taking a parked call:

The position where the call is parked is dialed. In the above example, dial 701 to get the parked call.

Conference Room

If you want to set up a conference you should use one of the conference rooms of the PBX. The conference rooms are more like an extension with the difference that all internal callers can talk to that entity itself. The rooms are dynamic, are created by marking 555XXX, where XXX is the number of conference.

To access a conference room:

- Call directly to the room: ex dial 555100.
- Be transferred to the room.

To transfer to a room is typed, # # (The PBX says transfer) + 555 + room number.

Voicemail

Voicemail Notification:

Analog phones. The dialing tone when dialing is choppy.

IP Phones. It depends on the equipment, but generally is indicated on the screen.

You can configure a notification by mail to the mail box, warning that there is a voicemail. You can also attach voice mail.

Check the voice mail box:

- You dial ***66**
- The PBX asks for the password

You can access an account from another telephone dialing: * 66 + number (extension).

You can delete all messages in the box typing the * 67, for this is for the voicemail password will be asked and then played an audio query if you want to delete all messages, if so pressing 7 can erase all otherwise the transaction is aborted.

Do Not Disturb mode

When you are busy and do not want your phone rings you must enter the code * 78. From the moment we do this all calls to your extension will indicate that it is busy. To disable this mode must dial * 79.

Call Forwarding

Total (unconditional)

For calls to your extension being redirected to another, you must enter * 72 and then type the extension where you want to transfer calls. To disable this function must dial * 73.

When busy

If desired to redirected calls to one another extension, but only if the first is busy, it must enter * 62 followed by the extension number to which the calls they wish to transfer. To disable this mode you must dial * 63.

When not available

If you want the calls to be redirected to an extension, but only if the first is not available (when no answer after a while), you must enter * 64 followed by the extension number to which wish to

transfer calls. To disable this mode you must dial * 65.

Enable and disable voicemail



To enable voicemail on an extension you must enter * 91 to disable it while you must enter * 92.

Profiles

There are two types of users inside uContact, those are:

Agent

uContact Agent is a module for the contact center agent as the total solution for integration with features relating to data capture, monitoring by states, and integrated communications with the uContact platform.

Supervisor

uContact Supervisor is responsible for all system management, it manages and monitors campaigns and dialers; permits, users, and suppliers can be created and workflows can be set up along with forms and reports.

Since the uContact access interface is 100% web-based, the user must use some of the following features for entering the portal:

Operative systems

:WindowsLogo: Windows :AppleLgo: MacOS :UbuntuLogo: Ubuntu

Browsers

:ChromeLogo: Chrome :FirefoxLogo: Firefox :Edge: Edge

Agent

image-1674577809404.png

Introduction.

uContact Agent is a module for the call centre agent as the total solution for integration with features relating to data capture, monitoring by states and integrated communications with the uContact platform.

Login.

uContact Agent has a security control module to identify agents with a created profile allowing to have a strict control of the campaigns of each of the call centre agents.

uContact Agent login is the main page that lets you select the language and role (Agent in this case) in which the user will work and validate his credentials, entering the URL : <https://IPSERVER>

image-1674577868380.png

Once inside the agent portal we will find the following screen:

image-1674577888779.png

Inside the portal we can see the varied actions of the agent.

Telephone.

Contacts .

Allows to see every contact in the system, separated by online and offline users. A more specific contact search can be made by writing its username on the Search area.

Interactions

The user can interact with the contact on many ways, such as start a call, add to the favourite section and transfer an attended or blind call.

The chat allows the exchange of messages with other agents, mainly used to report actions or events among users when they are talking.

To initiate a chat, the agent selects from his phone the agent with whom you want to chat. Selecting the icon of chat on the contact, the conversation will open and there the agent can see the history of chats, send a receive messages.



image-1674577935391.png

When a new event reaches the agent, a beep sound will be heard and a notification with the name of the agent and his profile photo will be seen.

image-1674577964456.png

The chat also includes a feature that allows you to send a message to all active agents by broadcast.

The chat is located in the tab **Unified Inbox**, which contains other communication channels.

Group Chat

In addition to an agent-to-agent chat, there is also the possibility of group chat with members of the same campaign. This function can be accessed by selecting the desired campaign from the "contacts" section on the softphone



image-1674578003993.png

Broadcast

Agents can send a general message to EVERY online user in the portal. Just write the message on the Broadcast area and press enter to deliver it.

History

Allows to see the call log of the current session of the agent, if the call was incoming or outgoing, the called phone and the talked time.

Also, if a call was not answered or was rejected is indicated with a red colour.

When clicking on the phone number, it redirects itself leaving ready to dial.



image-1674578032583.png

Phone

Allows interaction making external calls. Among the features that will be allowed is the selection of the campaign which will call (in case you have more than one assigned outbound campaign).

Moreover you can initiate a call (green button) cut a call (button red), indicate the number to call (text box) or by typing the phone number buttons to which you wish to call.

image-1674578074873.png

Other functionalities

image-1674578098655.png

- **Hold:** Holds the call.
 - **Conference:** To start a conference follow the next steps.
 - If the agent is on an active call:
 - 1. Press the conference button
 - 2. The person at the other end of the phone will be transferred to the conference Room created and will be waiting for the speaker to arrive
 - 3. The speaker can add more people to the conference Room by calling them.
- This can be done as many times as wanted

- 4. For the speaker to get in the conference Room, just click on the conference button and the conference will start.
- If the agent is not on an active call:
 - 1. Press the conference button
 - 2. A conference Room will be created
 - 3. the speaker, who started the conference, can add more poeple by calling them. This can be done as many times as wanted
 - 4. For the speaker to get in the conference Room, just click on the conference button and the conference will start.
- **Mute:** Put the Agent microphone in mute.
- **Video:** Allow the video in the call, having the chance to video call a client.
- **Attended Transfer:** When the call is Attended transferred, the one who transfers the call gets in contact with the person that wants to be transferred to and if he accepts the call is transferred.
- **Blind Transfer:** When the call is Blind transferred, the call is transferred directly to the number dialed.

Transfer Window

- **Agents:** Transfer to agent belonging to a user campaign.
- **Campaigns:** Transfer to an inbound campaign owned by the agent
- **External number:** Transfer to a number outside of uContact.

image-1674578147668.png

Favourites

List of agents added to favourite.

image-1674578181012.png

Park

When the agent has an active call and presses Parking, the receiver will be put on hold and the agent will be without an active call to make others. When you want to return to the call, press the green phone button. Another way to return to the call is to dial the list number, which is displayed to the right of the number, in the case of the previous example would be 701.

SMS

Allows sending text messages to cell phones, indicating the number to which you want to send, the campaign and the text to send.

image-1674578210154.png

image-1674578224755.png

image-1674578238090.png

Name and number of the contact must be detailed. To finish the process click on the green button.

Show phone

It's possible to show the tab on the right side by clicking the expand button which is located in the upper right corner or using the display button located in the right side of the screen.



image-1674578283707.png

Calls

Calls notification

When the agent has an incoming call, he will be notified with a sound alert as well as a pop up outside the browser, or at the deploy button on the top right corner as shown in the picture.

image-1674578315230.png

Talking calls

On an incoming call, at the left margin an icon appears that the agent can use to take the call.

The call can also be taken by clicking the pop up as well as deploying the right margin and using the phone.

The call can be rejected by clicking on the cross to close the notification or using the hang up button of the phone.

The system also has AutoAnswer if this is defined to automatically answer the call beep sound will be heard by the Agent to know that you have a call in progress.

Once the call was attended, on the top side of the screen a timer will appear, showing the time that passed with the call being active.

Unanswered calls

In case that the agent does not take the call , it will be referred to the next available agent.

The system also has AutoAnswer. If it is defined, when taking a call, a beep sound can be heard by the agent to know that he has a call in progress.

The time that the agent has to answer the call is set to the campaign in which the agent is.

Ending calls

To end a call, the agent can click on the Cut button located on the left margin or from the agent's phone.

When a call ended by part of the agents or by client we will listen a double beep that indicates us that the call is finished.

Wrap-Up

The Wrap-Up is a time interval in which the agent can not receive any calls.

When the call ends, the agent will be on the Wrap-Up state. This is to have a controlled time to end the appropriate management.

The time can be seen in the top right of the screen as shown in the image.

Wrap-Up time is set to the campaign in which the agent is.

Unified Inbox

The agent will have all the interactions here.

The agent will look like the following interactions here

Each interaction will look like the following, having its channel icon and its details.



image-1674578546576.png

Interactions can be filtered by channel selecting its icon.

Transfer Interaction

The Agent may transfer the interaction to other agents or to other campaigns

- Pressing on Transfer will display a list of agents from the same campaign, arranged alphabetically, online and offline.
- Below will be listed all the campaigns to which the interaction can be transferred, including those that have bots.

Pin Interaction

By clicking on the pin, the agent will be able to maintain interactions at the top of the inbox.

Close Interaction

The Agent may end the interaction.

- If the campaign to which the interaction belongs has classifications, when closing it, the classifications modal will be displayed

Search for interactions

Through this button the agent can access the search for interactions.

To access them, it must be fulfilled that: They belong to an active campaign, the agent must be the one who attended the interaction, it must be finalized and **be in a range of one month**.

By default, all completed interactions will be brought.

Currently you can search for interactions belonging to **Email and SMS** campaigns

image-1674578615369.png

In the upper section we will find the Interaction Finder, it will look for matches in the destination mail box or the mails subject.

The same for SMS, the system will search for matches of destination numbers.

:lupa: To perform the search, the user can press the Enter key or click on the magnifying glass icon.

:Cruz: It allows to close the search engine of interactions and return to the unified inbox.

:FlechaAbajo: Allows you to change between Emails search SMS search or Messenger search (By default Emails). pressing it will display a modal like the following:

image-1674578639325.png

:CambioPagina: Allows you to search between results if you have more than 10 interactions that match the search criteria.

It should be noted that when you close the modal and open it again the system will show us the last search made with the current session.

The search for interactions will have a configuration option that will allow or not see interactions of other agents



Supervisor

image-1674578891737.png

image-1674578912028.png

Types of licenses
image-1674578961138.png

Permissions

The Supervisor profile can see in the left side section all the features supported for your security group.

image-1674579001110.png

Administration

A user with administration permissions will have the following features in the portal.

- [Users](#)
- [Campaigns](#)
- [Providers](#)
- [Audios](#)
- [Dialers](#)
- [Reports](#)
- [Quality](#)

- Gamification
- Workforce
- System
- Configuration

Supervision.

A user with supervision permissions will have the following features in the portal.

- Gamification
- Campaigns
- Dialers
- Status
- Forms
- Recordings
- Reports

Supervisor with Telephone.

If we create an Agent user that has the same name and password as a Supervisor user, we will create the Supervisor with a telephone.

Unlike a normal Supervisor user, he can belong to campaigns, use the telephone and use the breaks that correspond to the following changes:

Breaks.

On the top of the screen we can see a cup-shaped icon as the image shows.

image-1674579037059.png

To exit the pause, just press the Play button.

Unified Inbox▪

Supervisor inbox works the same as [Agent - Unified Inbox](#)

Telephone▪

The functionalities of the telephone will work the same as in [Agent - Telephone](#)

Calls▪

Call options work the same as [Agent - Calls](#)

Voice

The dialers allow the creation of direct dialing campaigns using different types of channels and in different ways.

Voice Campaigns

 Remember that to begin with the voice campaign setup, you must first have your trunk configured. For more information, see [Trunk Configuration](#).

Administration

The screenshot shows a web-based configuration interface for campaigns. It has a top navigation bar with 'Campaigns' and 'Members' tabs. The main content area is titled 'Campaigns' and has two tabs: 'Inbound' (selected) and 'Outbound'. The 'Inbound' tab contains fields for 'Name', 'Email', 'DID's', and 'DID', followed by a 'Upload DID's file' button and a 'Thresholds' section with various input fields. The 'Outbound' tab contains fields for 'Strategy', 'Round seconds', 'Join empty', 'Leave when empty', 'Welcome', 'After hours', 'From', 'Quality', and 'Campaigns to transfer'. It also features a 'Schedules' section with a calendar view and a 'Properties' section with a 'Breaks' sub-section. At the bottom right, there are 'Delete' and 'Save' buttons.

First, we must specify the type of the campaign.

There are two possibilities:

- Inbound — Allows taking calls.
- Outbound — Allows making calls.

Basic configuration.

To create a new voice campaign, you must specify:

- **Name** of the campaign.
- **DID**
 - (telephone number) associated with the campaign for identification purposes.
- **Dial String:** provider used on the outbound calls that are dialed manually.
 - Only for inbound campaigns.
- **Schedule**

Days of the week and Hours between which the campaign will be available, that is, with agents available to answer calls.

To add a schedule setting:

- Select the Days of the week.

- Set start and end time for selected days.
- Add with the '+' button and our configuration will appear in the list.
- To delete a schedule, we simply select it from the list and press the '-' button.



The remaining fields will be loaded by default with the necessary information for proper operation.

Pressing **Save**, our campaign will be created, and we will see it in the list of campaigns on the right of the screen.

Now our campaign, it's ready to take and make calls.

Form

Here, you can define the Form that is going to be displayed when an Agent is talking to a client (as a pop-up). [Read more about Forms](#).

But it can also be a URL, whose format must be:

- blank:URL — In this way, indicating 'blank:' a new tab will open with the URL after each connected call
- URL|Form Name|true — This way we open the URL in an iframe of uContact, we indicate a name with the first pipe "|" and we enable to close the form with the second.

Example

<https://www.yourpage.com>|FormName|true — This will display a URL in a uContact iframe.

blank:<https://www.yourpage.com> — This will open a browser tab with the indicated URL.



The URL must start with https, if it is only http it is blocked.

URLs should always be entered completely with the <https://www>

Audio

If our campaign is **inbound**, we can define different audios.

- **Welcome**
 - A welcome message that the clients listens to when contacting the campaign.
- **Out of hours:** Message reproduced when the campaign is out of hours.

- In these cases, we have the Voicemail checkbox. When activated, a voicemail is assigned to the campaign.
 - In the displayed box, you must enter the voicemail number.
-

DID

- If the DID is shorter than 5 numbers, Flow modifications are necessary. Otherwise, you can contact Integra Support.
 - Every DID corresponds to one campaign.
 - You will have more than one phone number for a campaign, joining them with the ampersand (&)
 - If you want the same DID for multiple campaigns, Flow modifications are necessary. Otherwise, you can contact Integra Support.
-

Caller ID for outgoing campaigns

The CALLERID can have the following format:

```
PREFIX#CALLERID-RANDINI-RANDFIN
```

The CALLERID is the only mandatory one.

By placing a prefix before the CALLERID, we indicate that we want to use it if the number to call has that prefix.

File format with different possibilities:

```
PREFIX1#CALLERID1-RANDINI-RANDFIN
```

```
PREFIX2#CALLERID2
```

```
PREFIX2#CALLERID1-RANDINI-RANDFIN
```

```
CALLERID3-RANDINI-RANDFIN
```

```
CALLERID4
```

How do you choose the dialer from the destination number?

If there are matching prefixes:

- One is chosen at random from among them.

If no matching prefix exists:

- It is randomly chosen among the generics. (Required at least one)

In all cases, **RANDINI-RANDFIN** can be used (they must have the same length).

This generates a random number within this range and concatenates that number to the chosen callerid.

You can also upload a Caller ID CSV file in the same format as shown above.

This also applies for <https://integra-scm.atlassian.net/l/c/VpYZtB42>

Breaks

Personalized breaks are defined for the campaign, these breaks will be seen by all the agents associated with it.

- To add a break, Enter the name of the break, Press '+' to add the break (the break is added to the list).
- To delete a break, select it from the list and press '-' to remove it.

When configuring a new campaign of Incoming or Outgoing type, we can find the following parameters:

Email

Campaigns email.

Wrap up

Time not to send another call after hanging up, allows the agent to finish what he is doing (ex. data entry).

Service Level

The threshold to calculate service level. The answered inside the service level in seconds.

Quality

Multiple quality models can be adjudicated here.

Transfer Campaigns

Campaigns enabled for transfers. If this field is left empty, all voice campaigns will be enabled.

Thresholds

This section allows you to set thresholds for monitoring the campaign.

Record

Whether record or not incoming calls to the inbound campaigns.

If you want to modify any of the following fields, it is important to understand the concepts and what value you add to your business.

For more information, do not hesitate to consult the following links:

Parameters

Music on Hold: Name of the type of music on hold (default: default)

Timeout: How much time the agent's phone rings.

Retry: How long to wait before trying again to all members (retry configuration does not apply to the leastrecent strategy).

Max: Maximum number of people waiting in the campaign line (0 for no limit).

Weight: Weight of the campaign, priority.

Member Delay: Waiting time that the Agent has before being able to speak to the client or listen to an advertisement.

Context: Context so that if something is typed while being in the campaign, to go to this last one.

Announce Frequency: How often, in seconds, the audio indicated in Periodic Announce is reproduced (0 is off). Time is taken from the beginning of the audio. For example: if it indicates 20, then every 20 seconds the audio will be reproduced, no matter how long this one is. Take into consideration depending on how long the audio is (it should be shorter than the announced time).

Periodic Announce: name of audio to be played from time to time during the wait. It uses the parameter "Announce frequency" to reproduce.

Auto-Answer: If checked, calls entering through this campaign will be automatically answered, not letting the agent take his/her time to answer.

Strategy:

Round Seconds:

Rounds the hold time announcement to the nearest rounding seconds configured in this option.

It controls the value to round to when we announce the caller's hold time. For example, if the round seconds options is set to 30, instead of saying "1 minute and 23 seconds," the value would be rounded to the nearest 30-second value, which would result in a prompt of "1 minute and 30 seconds."

Round seconds in 0, 5, 10, 15, 20, or 30 to report the caller.

Join Empty

Leave When empty: leave if the campaign is empty.

Out of time: Message reproduced when the campaign is out of time.

Voicemail: When this box is checked, the campaign gets a voicemail assigned to it with the 4-digit number the user must write. Voicemail details can be found in [Voicemail](#).

Properties

Report Hold Time: Whether the hold time of the agents needs to be reported or not.

Timeout Restart: If selected to true, the timeout an agent has to answer the call is restarted if the actual state is BUSY or CONGESTION. This can be useful if agents are able to cancel a call with reject or similar. Also, when agents return NO ANSWER (ring, no-answer) this also causes the queue to move to the next agent in a round-robin.

Ring in Use: If it's possible to call an agent that is occupied more than one time.

Announce Time: Every how many seconds the campaign position is announced or the waiting time (0 is off).

Announce Position: If notify or not the waiting position of the client is in the queue.

Announce Hold: If the hold time is announced or not to the client.

Virtual Hold: When the client is in the queue waiting to be attended to, and he/she decides to end the call, this one remains under "virtual hold". Later in, when "virtually" is the client's turn, an automatic callback is made to her/him. (Happens with abandoned calls)

Dialing Strategies

There are 7 call distribution strategies in uContact, which are:

- **ringall**
- **leastrecent**
- **fewestcalls**
- **random**
- **rrmemory**
- **linear**
- **wrandom**

These types of strategies are determined by the agent's status at the time the call is delivered.

ringall

-  Take available agents into account

Call strategy which rings all available agents until the incoming call is answered by anyone of them.

leastrecent

-  Take the time without call into account

Call strategy that rings or delivers the call to the agent that was least recently hung up within the queue.

fewestcalls

 Take answered calls into account

Call strategy that rings or delivers the call to the agents with the fewest completed calls.

random

 Take available agents into account

Call strategy that rings a random agent.

linear

 Take into account the agent connection order

Call strategy will place agents in a row in the order that were added to the campaign (queue). Call strategy will always search for the first agent in line, and if it is not available, it will look for the second in line, and so on.

rrmemory

 Does not take into account the penalty

Call strategy (round robin) that remembers which agent answered the last incoming call and starts with the next agent in the round robin.

wrandom

 Take into account the penalty

Call strategy that distributes calls in a balanced but random way among the available agents of the campaign, those with the highest penalty being the last to receive them.

The agent's penalty is considered, the higher the penalty value, the less chance that the agent will be delivered a call.

Flows Dialers

VoiceBroadCast

```
exten=> _X.,1,Set(CHANNEL(Language)=es)
exten=> _X.,2,Answer(5)
exten=> _X.,3,Set(CALLERID(num)=${EXTEN})
exten=> _X.,4,Set(CALLERID(name)=${CDR(campaign)})
exten=> _X.,5,Set(__dialed=${EXTEN})
exten=> _X.,6,Set(__REALDIALED=${EXTEN})
exten=> _X.,7,GUID(__guid)
exten=> _X.,8,Set(CDR(guid)=${guid})
exten=> _X.,9,Playback(${sound},)
exten=> _X.,10,Read(__confirma,IVRDemoDesicion,1,,1,5)
exten=> _X.,11,GotoIf("${confirma}" = "1"?14:12)
exten=> _X.,12,GotoIf("${confirma}" = "2"?9:13)
exten=> _X.,13,Hangup()
exten=> _X.,14,Set(CDR(campaign)=${CDR(campaign)})
exten=> _X.,15,Set(MONITOR_FILENAME=${guid})
exten=> _X.,16,Set(__Ani=${EXTEN})
exten=> _X.,17,Set(CDR(type)=record)
exten=> _X.,18,SipAddHeader(CTI: {"Guid": "${guid}" , "Screen": "FALSE" , "Form": "${FORM}" , "Campaign" : "${CDR(campaign)}" , "Callerid" : "${CALLERID(num)}" , "ParAndValues" : "${PARAVAL}" , "Beep" : "TRUE" , "Answer" : "TRUE" , "Dialer" : "${DIALERRECORD}"})
exten=> _X.,19,GotoIf("${am}" = "1"?22:20)
exten=> _X.,20,Queue(${VBQUEUE},TtKk,,,600,,,,)
exten=> _X.,21,Goto(VoiceBroadCast,${EXTEN},13)
exten=> _X.,22,Background(silence/1,,)
exten=> _X.,23,AMD(4000,9000,2250,15000,100,50,5,256)
exten=> _X.,24,GotoIf("${AMDSTATUS}" = "MACHINE"?27:25)
exten=> _X.,25,Set(__userfield=${AMDSTATUS} - ${AMDCAUSE})
exten=> _X.,26,Goto(VoiceBroadCast,${EXTEN},20)
exten=> _X.,27,Set(__userfield=${AMDSTATUS} - ${AMDCAUSE})
```

```
exten=> _X.,28,WaitForSilence(,,)
exten=> _X.,29,Playback(${amsound},)
exten=> _X.,30,Goto(VoiceBroadCast,${EXTEN},13)
```

```
exten=> h,1,Set(HASH(rates)=${ODBC_Data(select rates.gateway\, rates.rate\, rates.cost\, rates.note FROM
rates LEFT JOIN provider ON provider.name=rates.gateway WHERE provider.status = 'true' AND substring(
'${EXTEN}'\, 1\, length( prefix_regexp ) ) REGEXP prefix_regexp ORDER BY length(prefix_regexp)
DESC\,rates.rate ASC))}
exten=> h,2,Set(talkedminutes=${MATH(${CDR(billsec)} / 60,f)})
exten=> h,3,Set(talkedminutes=${CEIL(${talkedminutes}}))
exten=> h,4,Set(chargedbalance=${MATH(${talkedminutes} * ${HASH(rates,rate)},f)})
exten=> h,5,Set(realbalance=${MATH(${talkedminutes} * ${HASH(rates,cost)},f)})
exten=> h,6,Set(CDR(charged_balance)=${chargedbalance})
exten=> h,7,Set(CDR(real_balance)=${realbalance})
exten=> h,8,Set(CDR(note)=${HASH(rates,note)})
exten=> h,9,Set(CDR(carrier)=${HASH(rates,gateway)})
exten=> h,10,Set(CDR(userfield)=${userfield})
exten=> h,11,Set(CDR(direction)=outgoing)
exten=> h,12,Set(CDR(causecode)=${HANGUPCAUSE})
exten=> h,13,Hangup()
```

Progressive, Preview.

```
exten=> _XXXXX.,1,Set(VOLUME(TX)=2)
exten=> _XXXXX.,2,Set(VOLUME(RX)=2)
exten=> _XXXXX.,3,Set(__OUTQUEUE=${CDR(campaign)})
exten=> _XXXXX.,4,Set(__DIALED=${EXTEN})
exten=> _XXXXX.,5,Set(__AGENT=${OUTAGENT})
exten=> _XXXXX.,6,Set(__guid=${OUTGUID})
exten=> _XXXXX.,7,Set(did1=${CUT(OUTDID,-,1)})
exten=> _XXXXX.,8,Set(did2=${CUT(OUTDID,-,2)})
exten=> _XXXXX.,9,GotoIf("${did2}"=="")?26:10)
exten=> _XXXXX.,10,Set(digit1len=${LEN(${did1}}))
exten=> _XXXXX.,11,Set(digit1len=${MATH(${digit1len} - 2,i)})
exten=> _XXXXX.,12,Set(randDID=${RAND(${did1:-2},${did2}}))
```

```

exten=> _XXXXX.,13,Set(CALLERID(num)=${did1:0:${digit1len}}${randDID})
exten=> _XXXXX.,14,Set(CALLERID(name-pres)=${CALLERPRESS})
exten=> _XXXXX.,15,Set(dummy=${ODBC_Data(UPDATE calls_pool set status =0\, retries = retries + 1
WHERE contact = ${CDR(contact)} AND destination = '${EXTEN}'))
exten=> _XXXXX.,16,Set(CDR(guid)=${guid})
exten=> _XXXXX.,17,Set(CDR(type)=record)
exten=> _XXXXX.,18,MixMonitor(${guid}.gsm,b,)
exten=> _XXXXX.,19,Set(CDR(accountcode)=${AGENT})
exten=> _XXXXX.,20,Set(__idLlamada=${guid})
exten=> _XXXXX.,21,Set(__REALDIALED=${EXTEN})
exten=> _XXXXX.,22,Dial(${DIALSTRING:0:-1}/${EXTEN},30,ctTM(RECORD),)
exten=> _XXXXX.,23,Set(CDR(causecode)=${HANGUPCAUSE})
exten=> _XXXXX.,24,NoOp(${DIALSTATUS} - ${HASH(SIP_CAUSE,${CDR(dstchannel)})} - ${HANGUPCAUSE})
exten=> _XXXXX.,25,Hangup()
exten=> _XXXXX.,26,Set(CALLERID(num)=${OUTDID})
exten=> _XXXXX.,27,Goto(Progressive,${EXTEN},14)

```

```

exten=> h,1,Set(HASH(rates)=${ODBC_Data(select rates.gateway\, rates.rate\, rates.cost\, rates.note FROM
rates LEFT JOIN provider ON provider.name=rates.gateway WHERE provider.status = 'true' AND substring(
'${EXTEN}', 1\, length( prefix_regexp ) ) REGEXP prefix_regexp ORDER BY length(prefix_regexp)
DESC\,rates.rate ASC))
exten=> h,2,Set(talkedminutes=${MATH(${CDR(billsec)} / 60,f))
exten=> h,3,Set(talkedminutes=${CEIL(${talkedminutes})})
exten=> h,4,Set(chargedbalance=${MATH(${talkedminutes} * ${HASH(rates,rate)},f))
exten=> h,5,Set(realbalance=${MATH(${talkedminutes} * ${HASH(rates,cost)},f))
exten=> h,6,Set(CDR(charged_balance)=${chargedbalance})
exten=> h,7,Set(CDR(real_balance)=${realbalance})
exten=> h,8,Set(CDR(note)=${HASH(rates,note)})
exten=> h,9,Set(CDR(carrier)=${HASH(rates,gateway)})
exten=> h,10,Set(CDR(userfield)=${userfield})
exten=> h,11,Set(CDR(direction)=outgoing)
exten=> h,12,Set(CDR(causecode)=${HANGUPCAUSE})
exten=> h,13,NoCDR()
exten=>
h,14,QueueUpdate(${OUTQUEUE},${UNIQUEID},${AGENT},${DIALSTATUS},${ANSWEREDTIME},${DIALEDTIME}
)|${DIALED})|${idLlamada}|)
exten=> h,15,Hangup()

```

PowerDialer, Predictive.

```
exten=> _X.,1,Set(CHANNEL(Language)=es)
exten=> _X.,2,Answer(0)
exten=> _X.,3,Set(CALLERID(num)=${EXTEN})
exten=> _X.,4,Set(__dialed=${EXTEN})
exten=> _X.,5,Set(__REALDIALED=${EXTEN})
exten=> _X.,6,Set(__Ani=${EXTEN})
exten=> _X.,7,GUID(__guid)
exten=> _X.,8,Set(CDR(guid)=${guid})
exten=> _X.,9,Set(CDR(campaign)=${CDR(campaign)})
exten=> _X.,10,Set(MONITOR_FILENAME=${guid})
exten=> _X.,11,Set(CDR(type)=record)
exten=> _X.,12,SipAddHeader(CTI: {"Guid": "${guid}" , "Screen": "FALSE" , "Form": "${FORM}" , "Campaign" :
"${CDR(campaign)}" , "Callerid" : "${CALLERID(num)}" , "ParAndValues" : "${PARAVAL}" , "Beep" : "TRUE" ,
"Answer" : "TRUE" , "Dialer" : "${DIALERRECORD}}")
exten=> _X.,13,GotoIf("${am}" = "1"?16:14)
exten=> _X.,14,Queue(${CDR(campaign)},TtKk,,,600,,,,)
exten=> _X.,15,Hangup()
exten=> _X.,16,Background(silence/1,,,)
exten=> _X.,17,AMD(6000,1500,800,2500,100,50,3,256)
exten=> _X.,18,GotoIf("${AMDSTATUS}" = "MACHINE"?19:14)
exten=> _X.,19,Set(__userfield=${AMDSTATUS} - ${AMDCAUSE})
exten=> _X.,20,GotoIf("${RETRY} <= ${MAXRETRIES}?22:21)
exten=> _X.,21,Hangup()
exten=> _X.,22,Set(dummy=${ODBC_Data(DELETE FROM calls_spool WHERE contact = ${CDR(contact)} ))}
exten=> _X.,23,Set(dummy=${ODBC_Data(INSERT INTO calls_spool VALUES(${DIALERRECORD}})})
exten=> _X.,24,Goto(PowerDialer,${EXTEN},21)

exten=> h,1,Set(HASH(rates)=${ODBC_Data(select rates.gateway\, rates.rate\, rates.cost\, rates.note FROM
rates LEFT JOIN provider ON provider.name=rates.gateway WHERE provider.status = 'true' AND substring(
'${EXTEN}'\, 1\, length( prefix_regexp ) ) REGEXP prefix_regexp ORDER BY length(prefix_regexp)
DESC\,rates.rate ASC)})
exten=> h,2,Set(talkedminutes=${MATH(${CDR(billsec)} / 60,f)})
exten=> h,3,Set(talkedminutes=${CEIL(${talkedminutes}}))
exten=> h,4,Set(chargedbalance=${MATH(${talkedminutes} * ${HASH(rates,rate)},f)})
```

```
exten=> h,5,Set(realbalance=${MATH(${talkedminutes} * ${HASH(rates,cost)},f)})
exten=> h,6,Set(CDR(charged_balance)=${chargedbalance})
exten=> h,7,Set(CDR(real_balance)=${realbalance})
exten=> h,8,Set(CDR(note)=${HASH(rates,note)})
exten=> h,9,Set(CDR(carrier)=${HASH(rates,gateway)})
exten=> h,10,Set(CDR(userfield)=${userfield})
exten=> h,11,Set(CDR(direction)=outgoing)
exten=> h,12,Set(CDR(causecode)=${HANGUPCAUSE})
exten=> h,13,GotoIf("${ABANDONED}" == "TRUE"?15:14)
exten=> h,14,Hangup()
exten=> h,15,Set(dummy=${ODBC_Data(DELETE FROM calls_spool WHERE contact = ${CDR(contact)}))})
exten=> h,16,Set(dummy=${ODBC_Data(INSERT INTO calls_spool VALUES(${DIALERRECORD})))})
exten=> h,17,Goto(PowerDialer,${EXTEN},14)
```

Omnichannel

Omnichannel

Ring Strategies

Webchat

Campaign Settings

Here Webchat campaigns will be created.

The configuration screen looks like the following:

The screenshot displays the WebChat configuration interface. On the left, the 'WebChat' settings panel includes fields for Name, Bot Name, Service level, Bot when finish, and Thresholds. It also has checkboxes for Show agent name, Enabled, Enable Feedback, Full stars, Enable Email, Allow audio and video, Allow attachments, and Offline message. The 'Additional Field webchat' section includes checkboxes for Visible and Required, and a dropdown for Telephone. The 'Schedules' section shows a schedule for Monday, Tuesday, Thursday, Friday, and Saturday from 09:00 to 18:00. On the right, a table lists the configured campaigns.

NAME	STRATEGY	SERVICE LEVEL
DOT_MCH	single	10
consultweb	waitandinteraction	50
Information	singlemultiple	10
WEB	single	10

Basic Configuration



- **Name:** Name of the Webchat's campaign.
- **Strategy:** Behavior that Webchat interactions will present. Visit [Strategies](#) for more information
- **Service Level:** The level of service is the percentage of chats that were attended/abandoned by the agent before/after a stipulated time limit.
- **Schedule:** Schedule in which the Webchat campaign will be available. Visit [Inbound voice campaigns](#) and see 'Schedule' for more information

- **Welcome**

The welcome message is shown on the client's window when the Webchat campaign is available. The user can configure three different messages in its own language, es (SPANISH), en (ENGLISH), and pt (PORTUGUESE). Select a language and write the personalized welcome message, then select another language, and so on.

- **Out of Time**

The message will appear to the client if the campaign is out of time. The user can configure three different messages in its own language, es (SPANISH), en (ENGLISH), and pt (PORTUGUESE). Select a language and write the personalized Out of Time message, then select another language, and so on.

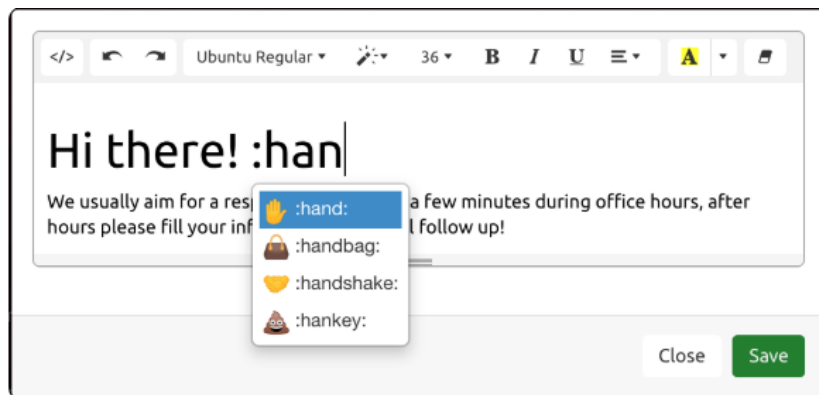
- **Message Not Available**

The message appears when there are no agents available to attend an interaction in the queue. The user can configure three different messages in its own language, es (SPANISH), en (ENGLISH), and pt (PORTUGUESE). Select a language and write the personalized Message Not Available message, then select another language, and so on.

- **Feedback**

At the end of the interaction, the message defined in this field will be displayed.

 Every message can be customized:



 Check out the following link to see the complete list of emojis you can use: [Complete list of github markdown emoji markup](#)

Each emoji can be edited, location in text and size:

Other Fields

- **Maximum Interactions per Agent:** Limits the number of active interactions the agent can get. The rest of the interactions wait in the queue.
- **Quality:** A quality model can be assigned to the campaign. When an agent closes the interaction, a quality model will appear so the agent can respond to it. This response can be seen on the Webchat Recordings.
- **Automatic Agent Message:** This message will be sent automatically to the client when the interaction starts.

Email

Email Management

To manage the configuration of the email campaigns in uContact, it is necessary to have a user with administrator permissions in the system.

Basic email settings

Here you can create email campaigns.

Campaign data

- **Name**
Name of the email campaign.
- **Service level**
It is the time in which the interactions that arrive at the campaign must be answered, if the waiting time is greater than that stipulated in the field, the level of service drops.
- **Strategy**
It is the behavior that the campaign will have. For more information on the different strategies.
- **Schedules**
Schedule in which the campaign will be available, that is, with available agents to handle interactions. To add a schedule configuration is with the '+' button or remove a selected one from the list with the '-' button.
- **From name**
It is the name with which the email account assigned to the campaign is displayed when it reaches the recipient.

Email Data

- **Account**
It is the mail by which emails will be received.
- **Password**
The password assigned to the account. If it is written incorrectly, it will not be possible to create the new campaign, the user will be warned in case this happens.

- **Outbound SMTP**

Protocol for simple transfer of assigned mail. This is mandatory to send emails.

- **Inbound IMAP**

Internet message access protocol assigned. This is mandatory only if Receive Emails is active.

- **Port**

Port number assigned for each protocol.



To finish the creation process, the user must click the "Save" button.

Parameters ■

Maximum interactions per agent

The number of interactions of this campaign that the agent can have at the same time. **It is only required for the nocall strategy.**

Enabled

If it is checked, the campaign can be used.

Receive Emails

If enabled, emails sent to the configured email address will be queued as an interaction to the portal. In addition, the IMAP and POP fields will be mandatory. If this checkbox is empty, the campaign will not require incoming ports and will not receive emails either, but it will be able to send.

Signature

Within the Templates section, a signature template can be created and assigned here. When an agent answers/composes an email via this campaign, the assigned signature will be loaded automatically.

Enable qualification

When this check is active, it enables two more fields that are used to configure the qualification of outgoing emails.

SMS / WAB

SMS/Whatsapp Providers

For more information on the creation of SMS or Whatsapp providers, go to the corresponding pages: [SMS](#) [Whatsapp APIs](#)

SMS/Whatsapp Campaigns

After creating the provider, we can start creating SMS/Whatsapp campaigns.

The screenshot displays the configuration interface for an SMS/WhatsApp campaign. The interface is divided into two main sections: a configuration panel on the left and a data table on the right.

Configuration Panel (Left):

- NAME:** sms1
- Bot Name:** Bot Name
- Bot when Finish:** 10
- After Hours:** After Hours
- Thresholds:** 10-100, 210-100, 60-100-100, 8-1
- Schedules:** mon,tue,wed,thu,frï09:00-18:00
- Canned Responses:** Description

Data Table (Right):

NAME	STRATEGY	SERVICE LEVEL
sms1	ringit	10

Basic settings

- **Name**
Name to identify the SMS/Whatsapp campaign.
- **Service level**
The service level is the percentage of interactions that were attended/abandoned by the agent before/after a stipulated time limit.

- **DID-Ports**

In this field, you must enter a code (telephone number, alphanumeric, id, etc.) associated with the campaign for identification purposes. Generally, this information is provided by the provider and may vary.

- **SMS provider**

Clicking on the combo displays a list of all the SMS/Whatsapp providers that are registered in the system.

- **Strategy**

It is the behavior that the campaign will have. To learn more about the different strategies go to [Strategies - Omnichannel](#).

- **Schedule**

The hours in which the SMS campaign will be available, that is, with agents available to answer customer SMS. To add a schedule configuration you must add with the '+' button and a new window will appear or remove a selected one from the list with the '-' button.

✓ After saving your settings, you will see your campaign in the table on the right where you will find all the campaigns created in the system listed according to your security group.

Advanced settings

These parameters already have a default value for the correct operation of the campaign.

To know more go to [Important Concepts - Omnichannel](#).

Out of time

This will be the message that will be sent to the client if he sends a message while the campaign is out of hours.

Thresholds

These are metrics to carry out the statistics of the campaigns in real-time, they are measured in time (seconds).

- **Service level**

It is the expected time limit for the response of the chats by an agent.

- **Churn rate**

It is the elapsed time of chats to consider that they were abandoned by customers during the day.

- **Chat time**

Time elapsed to consider that the chat between agent and client reached the limit.

- **ACD**

The maximum number of customers waiting to be answered by a chat agent.

Maximum interactions by agent

Limits the number of active interactions an agent can have. The remaining interactions are queued. It is only used for nocall strategies.

Automatic termination due to inactivity (minutes): ▣

This setting allows you to configure the inactivity timeout (in minutes) after which an interaction will be automatically terminated. The timer starts **only when an agent has the interaction assigned**.

If the interaction is in a queue (for example, in a campaign) or is being transferred, the timeout does not run. Once the interaction is attended again, the inactivity timer resets to zero.

The same applies to incoming interactions: the inactivity timer begins only when an agent starts handling the interaction, **not** when it enters the queue.

If the configured value is **0**, automatic termination is disabled, meaning interactions will not be automatically closed due to inactivity.

Campaigns to Transfer: At this point, one or more campaigns can be selected; these will be the only ones to which generated interactions can be transferred. If none are specifically selected, transfers will be allowed to all campaigns. Additionally, dialers can also be selected. Selecting a dialer as a “campaign to transfer” does not enable transferring interactions to the dialersthemselves. However, when both settings — “Historic interactions from all campaigns” and “Show only campaigns available for transfer” — are enabled, the active interaction history will also load messages sent by the dialers selected as “campaigns for transfer” when loading previous messages.

Enabled

The system can have a campaign registered that is not running without having to delete it completely, in this way the supervisor will not lose relevant data. If it is checked, the campaign can be used.

Pre-setted responses

The campaign may have pre-written responses, which makes it easier and faster for the agent to interact with the customer.

Recordings

Sending to external storage

Security

Based on these considerations, they must also be taken into account for the antivirus scanning policies that may be installed on the computers, avoiding scanning or denial of access for security reasons.

Considerations

The network where agents are working, must consider the following

1. Port 3478 UDP/TCP must be opened at least for the host stun.ucontactcloud.com
2. Port 8089 UDP/TCP must be opened at least for the host [\(ucontactinstance\).ucontactcloud.com](http://(ucontactinstance).ucontactcloud.com)
3. Port 443 UDP/TCP must be opened at least for the host [\(ucontactinstance\).ucontactcloud.com](http://(ucontactinstance).ucontactcloud.com)
4. Ports 10000-2000 UDP must be opened at least for the host [\(ucontactinstance\).ucontactcloud.com](http://(ucontactinstance).ucontactcloud.com)
5. Access to the site <http://cacerts.geotrust.com/GeoTrustRSACA2018.crt> and redirector.gvt1.com/ must be enabled in order to allow browsers to validate uContact SSL certificate.
6. Enable access to the activator license site: us-central1-licenciator.cloudfunctions.net/api/servers/getLicence
7. Enable access to monitoring tool: monitor.ucontactcloud.com
8. Access to the following IP's (104.197.204.63 , 74.125.134.127) used by google chrome.
9. Verify that SIP - ALG is not active on the local or border network devices.
10. Verify that IPS - detection is not active because it can cause VoIP packet discard and voice problems (undespected call drops).
11. Domain *.github.com must be enable for system updates

Based on this considerations, the policy of the antivirus used on the workstations they must be actuated in order to avoid port scan, blocking or denying the access by security reasons.

ISO 27001

The international standard ISO 27001 allows the assurance, confidentiality, and integrity of data and information and the systems that process it. This allows organizations to analyze risk and apply the necessary controls to eliminate it.

If we go to the system configuration, we find the following options that will help us establish a more secure system for our users.

Within the company message option, you can set a warning message from the company, which will appear every time the agent logs in. The system will also display the date and time of the user's last logged-in session.

IMAGEN

Among the security measures it establishes are:

Password expires after a certain number of days. (Modifiable)

- Request mandatory password change after it is updated by the supervisor or for the first time the user logs in.

Account lockout after certain unsuccessful password entry attempts. (Modifiable)

At the time of changing the password, do not allow to use of the last X amount of passwords used. (Modifiable)

The system has three different states for users:

- Asset.
- Inactive.
- Blocked (due to failed login attempts).

The user is disabled if they do not log in to uContact after a certain number of days. (Modifiable)

Password Format sets the complexity that agent passwords should have. Here you can configure if you should have:

- lower case
 - Capital letters
 - Numbers
 - Special characters
 - and the minimum length of characters
-

If we go to the creation of agents, we can find the following fields available:

LOGIN SCHEDULE

The possibility of creating a login schedule establishes certain days of the week and hours in which the agent can connect to the system.

TEMPORARY ACCOUNT

There is also the opportunity to create temporary users, that is, an account is created that has a forced expiration on the date established in the fields.

PCI Compliance

PCI is the Payment Card Industry Data Security Standard, also known as PCI DSS and is an exclusive information security standard administered by the Security Standards Council and makes reference to a standard that contains a series of security requirements that all merchants, large or small, must comply with, this standard applies to any company that processes, stores or transmits credit card data, therefore the merchant must have a "PCI Certificate" that guarantees that all its processes and tools that it uses comply with the necessary security regulations to guarantee the integrity of the information, for which reason the uContact Omnichannel Contact Center software is "PCI Compliance" because it complies with the most common requirements that the client's process requires for its certification.

Some basic compliance requirements that some processes are required and are included in uContact are:

- Use a 128bit SSL certificate. In short: Protect data. Encrypt any public transmission of data.
- ISO 27001 Security of handling and protection of information
- ISO 27002 business continuity management process
- Install and maintain a firewall configuration to protect data.
- Do not use vendor defaults for system passwords and other security settings.
- Encrypt the transmission of cardholder data over open, public networks.
- Restrict access to data on a business need-to-know basis.
- Assign a unique ID to each person with access to the system.
- Perform regular access and security checks to network resources and data.
- Maintain a security policy and make sure all staff is aware of it.

In addition, Google Cloud undergoes an annual third-party audit to certify that all of its products are PCI DSS compliant. This means that the services provided an infrastructure on which customers can build their own services or applications for storing, processing, or transmitting cardholder data.

It is important to note that customers remain responsible for ensuring that their applications are PCI DSS compliant.

Infrastructure

Architecture

The connection is via HTTPS with a level 3 certificate via (<https://xxxx.ucontactcloud.com>), uContact uses HTTPS (http2) with a REST API and Secure Websockets (wss).

The connection is made through Secure Websockets <https://xxxx.ucontactcloud.com:8089/ws> (for SIP signaling).

Our STUN Server (stun.ucontactcloud.com)

Agent and Telephony server negotiate with STUN Server gathering ICE candidates.

After that the connection is made from the agent to the telephony server, bridging the communication with the telephony provider (via SIP, SIP TLS, SIP WebRTC).

The telephony server does the bridging to host all the recordings, transcoding, etc.

Codecs: We use alaw, ulaw, opus, vp8, h264. All the transcoding part takes action in the telephony server.

QoS: We can do TOS and COS tag (on the server-side) the packets with multiple parameters in different actions (video, audio, text)

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image-1674582121406.png

The server prefers cipher suites supporting Perfect-Forward-Secrecy.

The server provides HTTP Strict Transport Security.

The server provides HTTP Public Key Pinning.

X-XSS-Protection

Hardware Sizing (On-Premise)

Size	Agents	Telephony	Backend	Database
Small	< 30	1	0	0
Medium	< 500	1	1	0
Big	> 500	1	1	1

Accepted Telecommunications Equipment

Digium or Sangoma Cards, Xorcom, Dinstar, KHOMP, SIP Gateways, SIP Hardphones.

The teams of agents and supervisors must have the following minimum requirements:

Agent Desktop

- Processor: Core i5 2.0 GHz
- Memory: 8GB RAM
- Resolution: 1366 x 768 (minimum)
- Disk: 160 GB
- Chrome browser
- 2mb symmetric internet connection

Supervisor Desktop

- Processor: Core i5 2.5 GHz
- Memory: 8 GB RAM
- Resolution: 1366 x 768 (minimum)
- Disk: 160 GB
- Chrome browser

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Component Versions

BBDD: Mysql: 8 or 5.7

WebServer: NGINX 1.17. 0 (latest)

OS: Ubuntu 20.04, 18.04, 16.04

Telephony: Asterisk Modificado branch 13

Frontend: HTML5 y JS

Backend: Java 8

Structure

■

```
1/etc/IntegraServer/web/
2          IntegraPortalWS.war
3[ ]IntegraChannels.war
4[ ]IntegraGamification.war
5          /forms/
6          /images/
7          /uContact/
8          /workflowdesigner/
9          /formsdesigner/
10         /tmp/
11[ ]/webchatclient/
12 /etc/IntegraServer/reports/
13/etc/IntegraServer/server/
14[ ]IntegraServer.jar
15[ ]/jasper/*.jar
16[ ]/jdbc/*.jar
17[ ]/mail/*.jar
18[ ]/others/*.jar
19[ ]/ssh/*.jar
20[ ]/ws/*.jar
```

Network requirements for video calls

Bandwidth

- 1MB/s simétrico

Latency for toll-quality

- <100 ms total

Jitter

- < 20 ms jitter

Packet loss

- < 1 % for voice calls

Codec

- VP8

Network requirements for VoIP. ▣

Bandwidth

- 256 kbps per call

Latency for toll-quality

- <100 ms total

Jitter

- < 20 ms jitter

Packet loss

- < 1 % for voice calls

Codec

- ulaw, alaw

Required recordings Storage (audio y video). ■

Duration	Required Storage for audio (.gsm)	Required Storage for video (.webm)
----------	-----------------------------------	------------------------------------

Duration	Required Storage for audio (.gsm)	Required Storage for video (.webm)
1 Minute	100 kb	1.5 MB
10 Minutes	1 MB	20 MB
20 Minutes	2.8 MB	44 MB
30 Minutes	3.8 MB	100 MB

Computer equipment

Terminal Agents and Supervisors

The teams of agents and supervisors must have the following minimum requirements:

Agent Desktop

Processor: Core i5 2.0 GHz.

Memory: 8GB RAM.

Minimum resolution: 1366 x 768 (minimum)

Minimum disk: 160 GB

Internet browser: Chrome (or any browser that is part of the “CHROMIUM” project) (Firefox is not recommended)

2Mb upload/downlink link

Supervisor Desktop Computer

Processor: Core i5 2.5ghz

Memory: 8 GB RAM

Minimum resolution: 1366 x 768 (minimum)

Minimum disk: 160 GB

Internet browser: Chrome (preferably)

guides

uContact Guides

Conference Calls - ENG

- **Step 1:** Initially, when the call is in progress and to initiate a conference or a multi-way call, we will press the fourth icon shown at the bottom of the Softphone, (Conference Button):

image-1712618043773.png

Subsequently, the client/bank or whoever we were talking to will move to the conference room, and apparently the Softphone will end the call.

- **Step 2:** Then we will make a call to another telephone number, which we also need to bring into the conference. And so on with all the participants we need to add.

We will apply step 1 to the calls that we need to bring into the conference, as many times as necessary.

- **Step 3:** Once we have sent the required calls to the conference and without having any active call, we will press the **conference button**, which will send us to the conference room where both people from the previously sent calls are already present.

image-1712609569017.png

It's important to mention that the people/calls sent to the conference, while in the waiting room, will not be able to hear each other until the administrator joins the conference. Only then will the call have group communication between all participants.

The administrator can remove the last person who entered the conference by pressing *3, and so on if it's necessary to remove the last participants entered. Otherwise, they can simply end the call.

Transfer calls - ENG

In uContact, there are two features that will help us perform effective call transfers.

Attended Transfer

This transfer, as the name indicates, must be answered by the destination person to whom the call is being transferred. It allows communication between the person transferring and the person receiving the transfer, and until the latter answers the call, the transfer will not be completed

Blind Transfer

-Unlike the attended transfer, in this one it does not matter if the destination is available to take the call; it is simply transferred. If it is to an agent or campaign, and at that moment it cannot be attended to, it will go to the agent's or campaign's queue, respectively. In this transfer, there will be no communication between the person transferring and the destination.

The buttons for both types of transfers are located in the Softphone toolbar.
The attended transfer is the first option, showing an icon of two arrows.
The blind transfer is the third option, showing an icon of one arrow.

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When selecting either of the two transfer icons, whether **Attended** or **Blind**, the following menu will be displayed, offering 3 destination options for the transfer: **Agents**, **Campaigns**, and **External Number**

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- The **Agents** option will display all agents and their statuses, whether they are offline, online, or busy either on a call or on a break, (this will depend on the permissions assigned in the security groups).

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- The **Campaigns** option will display all campaigns to which you can transfer (this will depend on the permissions assigned in the security groups).

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- In the **External Number** option, we can send the call to any external phone number outside of uContact. The number must be dialed with 10 digits. We can also select this option to transfer to an agent's direct extension, but this will also depend on the permissions assigned in the security groups.

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Academy

uContact Agent is a module focused on the call center agent as a total integration solution with functionalities of: data capture, status supervision and communications integrated with the platform.

The Agent's Profile

Take the following training course to complete your uContact #Agent certification. Start with an introductory video that will help you get an overview of an agent's workspace in our solution and walk out an expert.

The Softphone

Learn how to use the uContact Softphone, developed natively in the solution using WebRTC technology. With it you will be able to initiate and/or answer calls directly from the platform just as you would from a desk phone, thus significantly reducing your time between calls.

The Agent's Interface

Personalize your uContact workspace so that your user experience with our solution is as close as possible to your tastes, preferences and personality. How? Watch this video and learn how to set your personal avatar, default wallpaper, and more!

The Unified Inbox

With uContact's unified inbox, agents can connect with customers on the digital channel of their choice without having to switch between browser windows. Here we tell you everything you need to know about how to manage your digital interactions on the same screen using our unified inbox.

Academy

The agent Workspace

<https://www.youtube.com/embed/hz6tFvQoxnA>

Training Agenda

Agent

Estimated time: 1 hour

- Operation Requirements
- Agent Interface Description
- Phone
- Breaks
- Forms
- Typifications
- Incoming and outgoing calls

Supervisor

Estimated time: 1 hour

- Overview general functionalities
 - Operation Requirements
 - Description Interface Supervisor
 - Administrator
 - Agents
 - Campaigns
 - Dailers
 - Audios
 - Supervisor
 - Agent Monitoring
 - Dailer Monitoring
 - Recordings
 - Reports
-

Q&A

Q&A

How to create an agent

https://www.youtube.com/embed/C4V_cNepaFQ