

ADMINISTRATOR GUIDE

AI-Powered Call Analytics Platform

Creatio integration with AI-Powered Call Analytics Platform

About Creatio

Creatio (formerly bpm'online) is a leading low-code, process automation and CRM company. It has been highly recognized as a market leader by key industry analysts. Creatio's intelligent platform accelerates sales, marketing, service and operations for thousands of customers and hundreds of partners worldwide. The mission of Creatio is to help companies ACCELERATE!

About RingCentral

RingCentral, Inc. (NYSE: RNG) is a leading provider of global enterprise cloud communications and collaboration solutions. More flexible and cost-effective than legacy on-premises systems, RingCentral empowers modern mobile and distributed workforces to communicate, collaborate, and connect from any location, on any device and via any mode.

About KAZOO VoIP

KAZOO is an open-source, highly scalable software platform designed to provide carrier-grade VoIP switch functions and features. Developers, system administrators, and telecom engineers can build flexible, reliable telecom services using the extensive KAZOO APIs.

AI-Powered Call Analytics Platform

Call Analytics Platform will dramatically improve your call center efficiency. The Artificial Intelligence component automatically transcribes and analyzes your agents' calls, identifying preset key events, such as greetings. The dashboard with aggregated stats on all the calls provides your managers with the insights allowing them to step up your call center operations: from training a new agent to supercharging marketing campaigns across the offices. Call Analytics Platform works in tandem with RingCentral or KAZOO telephony, automatically scrutinizing all inbound and outbound calls.

Call Analytics Platform turns every call into an actionable piece of data and makes it available at a glance for your call center managers so that they can find the areas for improvement.

- Elevate your Sales, Customer Engagement, and Customer Service experience.
- Control calls quality with automatic call scoring.
- Smooth out onboarding and training of new employees.
- Refine marketing campaigns.

Key Features:

- AI-generated call transcripts with dialog visualization, agent/customer identification, timestamps, etc. Each agent's and customer's remark can be played individually, and the whole transcript can be exported to a Word file or copied to the clipboard.
- Calls auto-scoring based on preset criteria, such as account verification or contact details confirmation. The AI component tracks whether a sales rep followed all the steps of a script during a call. A manager can also highlight specific skills used by the agent during the call.
- Call details, including call duration, agent/customer talk time, on-hold time, and time to connect.
- Dashboard with statistics on all calls, grouped by marketing campaigns and accounts, showing conversion rates, top skills, and the overall number of calls.

NOTE: Install RingCentral and KAZOO VoIP Connector for Creatio together with Call Analytics Platform to equip your agents and managers with a built-in dialer, backed by KAZOO or RingCentral telephony, <https://marketplace.creatio.com/app/ringcentral-and-kazoo-voip-connector-creatio>.

Velvetech Contact

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Versions of Creatio that support the Platform

Creatio 7.12 and up

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Setting up integration with the AI-Powered Call Analytics Platform

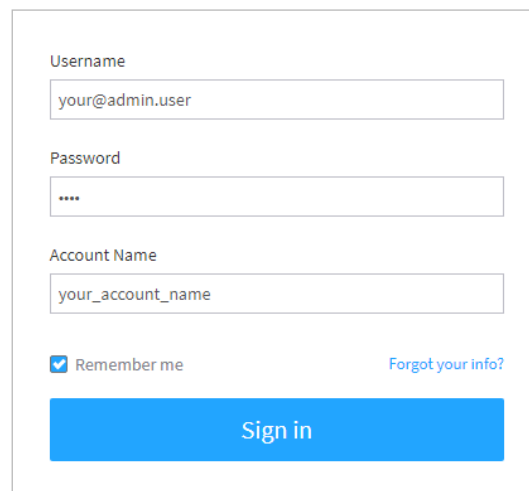
Prerequisites

- Admin access to Creatio instance to install the app.
- An active account in Creatio marketplace (<https://marketplace.creatio.com/>).
- Paid licenses to use the platform.
 - If you have paid for the licenses, Velvetech will provide each client personally with the System Settings needed for the application to work. These settings will be described in the section [Setting up integration](#).
 - If you have paid for the licenses, Velvetech will provide the client personally with the credentials needed to view the “Transcript” tab of the Call object. These credentials will be described in the section [Setting up integration](#).

Provide Kazoo settings to Velvetech

For the AI-Powered Call Analytics Platform to work, you should provide Kazoo settings to Velvetech. This will allow Velvetech to access your call recordings for further processing.

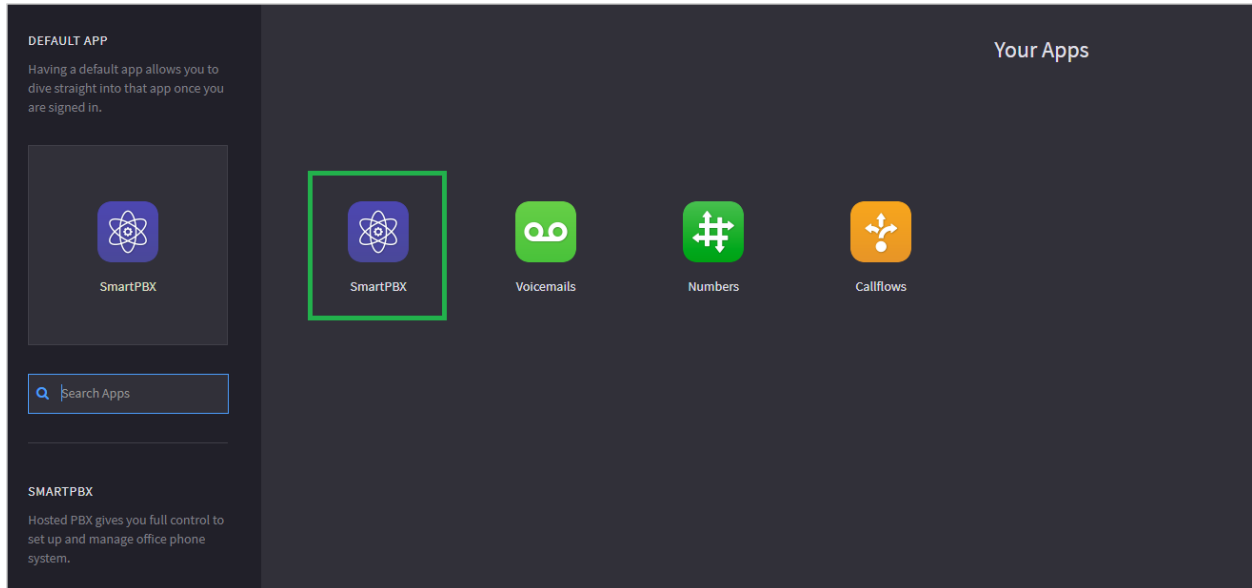
1. Login to your Kazoo Monster UI as administrator.



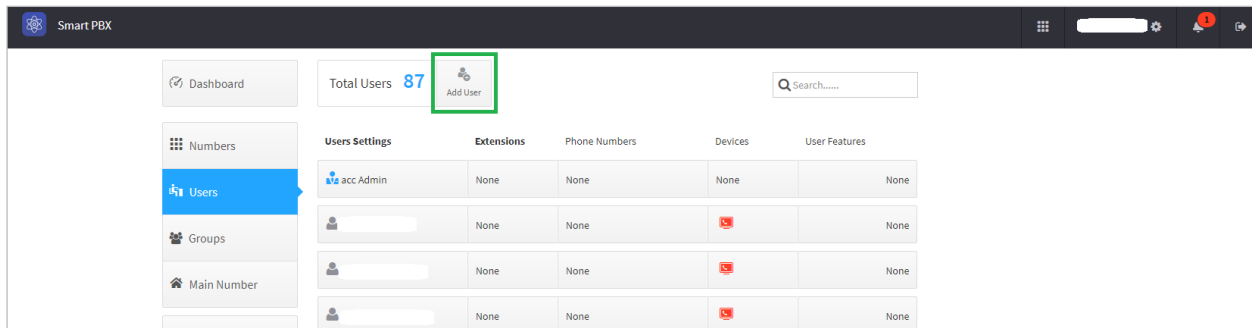
The image shows a login form for the Kazoo Monster UI. It contains the following fields and elements:

- Username:** A text input field containing the placeholder text "your@admin.user".
- Password:** A password input field with masked characters "****".
- Account Name:** A text input field containing the placeholder text "your_account_name".
- Remember me:** A checked checkbox with the label "Remember me".
- Forgot your info?:** A blue link text "Forgot your info?".
- Sign in:** A large blue button with the text "Sign in" in white.

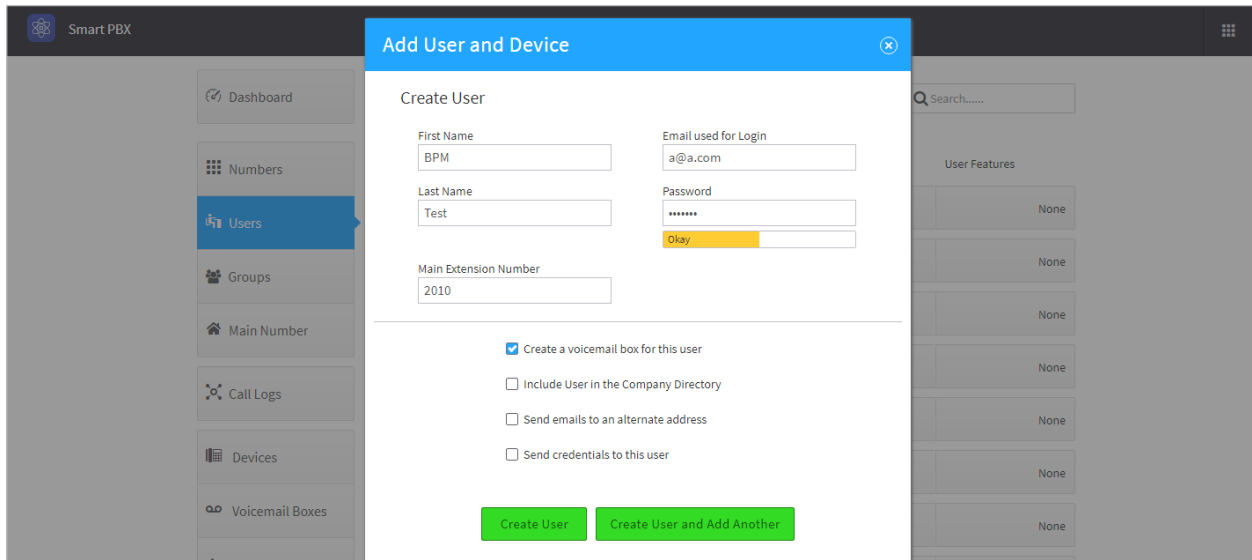
2. Enable SmartPBX in Kazoo.



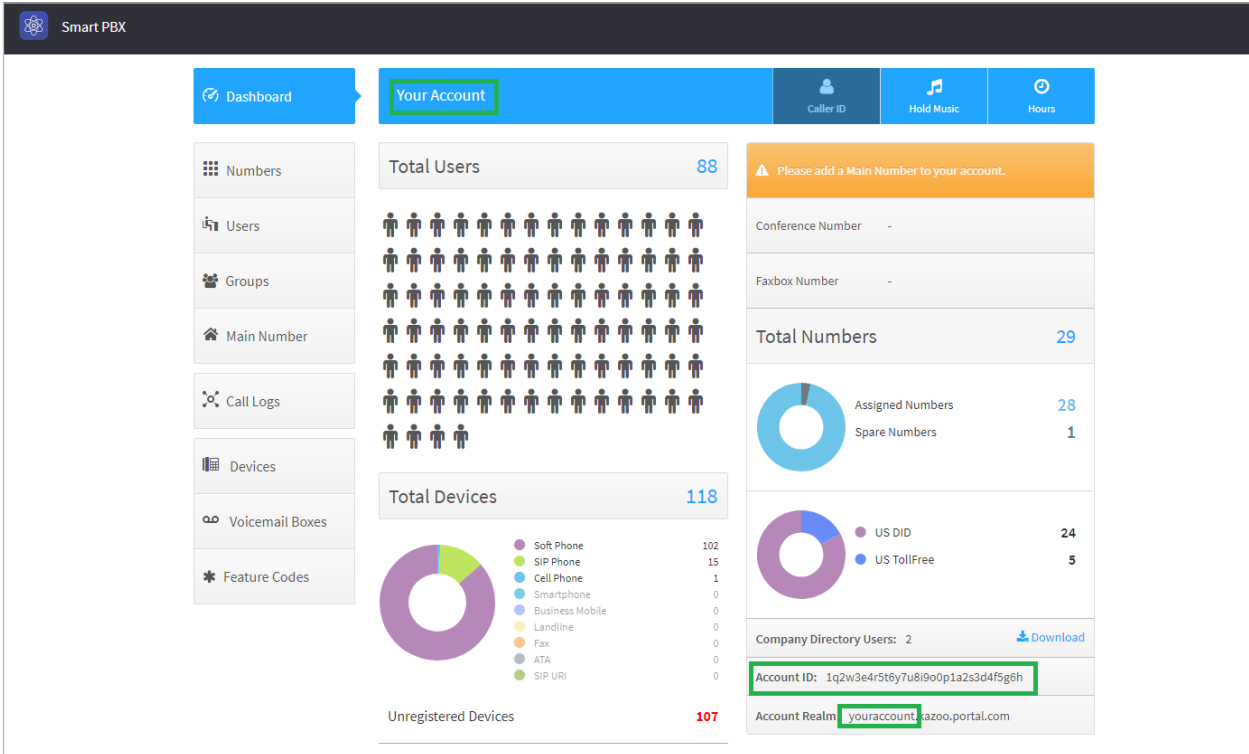
3. Navigate to SmartPBX -> Users and click on "Add User".



4. Create a user, remember the email used for login and the password.



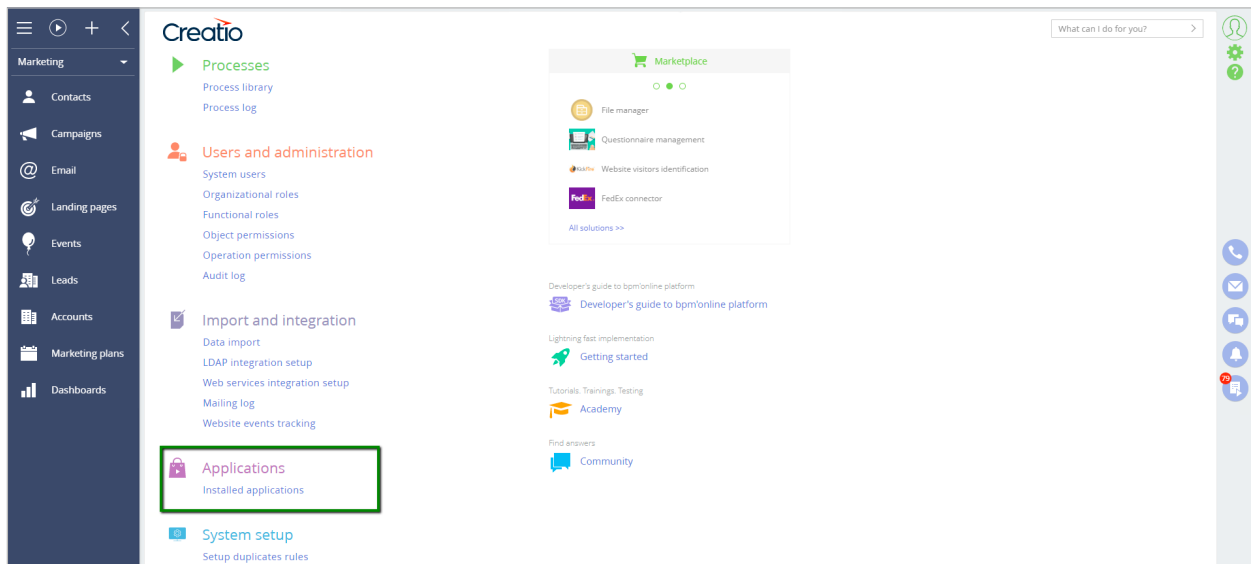
5. Navigate to SmartPBX -> Dashboard and remember your Account ID and Account Name.



6. Provide these settings to Velvetech.
 - a. Created User Login (step 4).
 - b. Created User Password (step 4).
 - c. Your Kazoo Account Name (step 5).
 - d. Your Kazoo Account ID (step 5).
 - e. Your Kazoo API location – please contact your system administrator to get it.

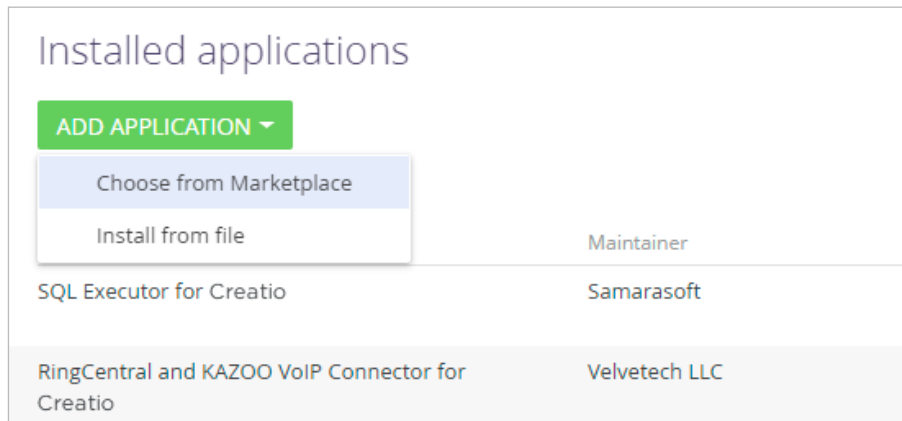
Installation process

1. Log into the targeted Creatio instance.
2. Navigate to System designer section.

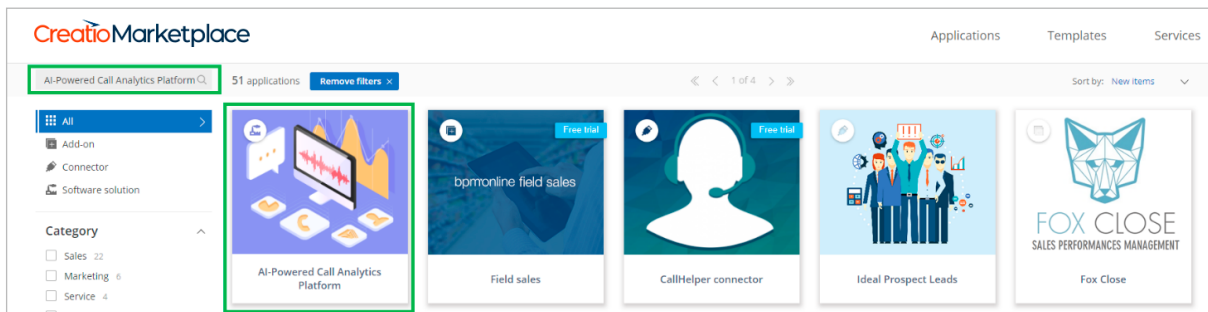


3. Navigate to Installed Application section and click “Add Application”.

- Click “Choose from Marketplace” from the dropdown menu → you will be transferred to the Creatio Marketplace.

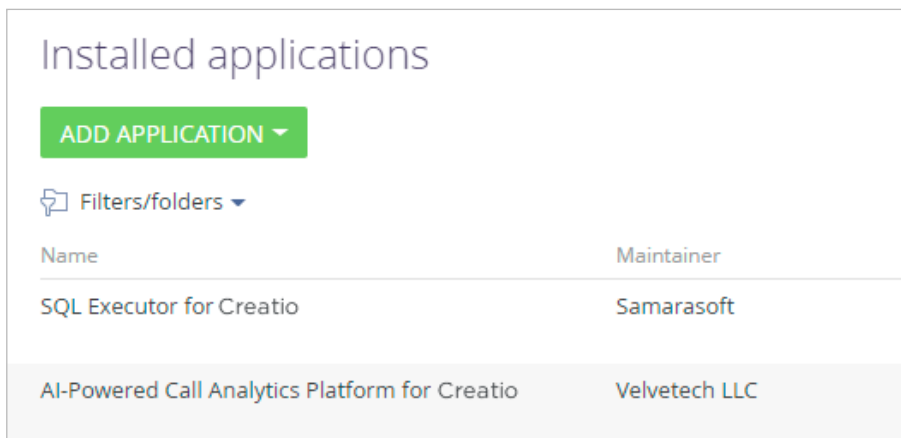


- Choose «AI-Powered Call Analytics Platform» in the list of applications and click on it to install. Marketplace should redirect you to the page of Creatio instance.



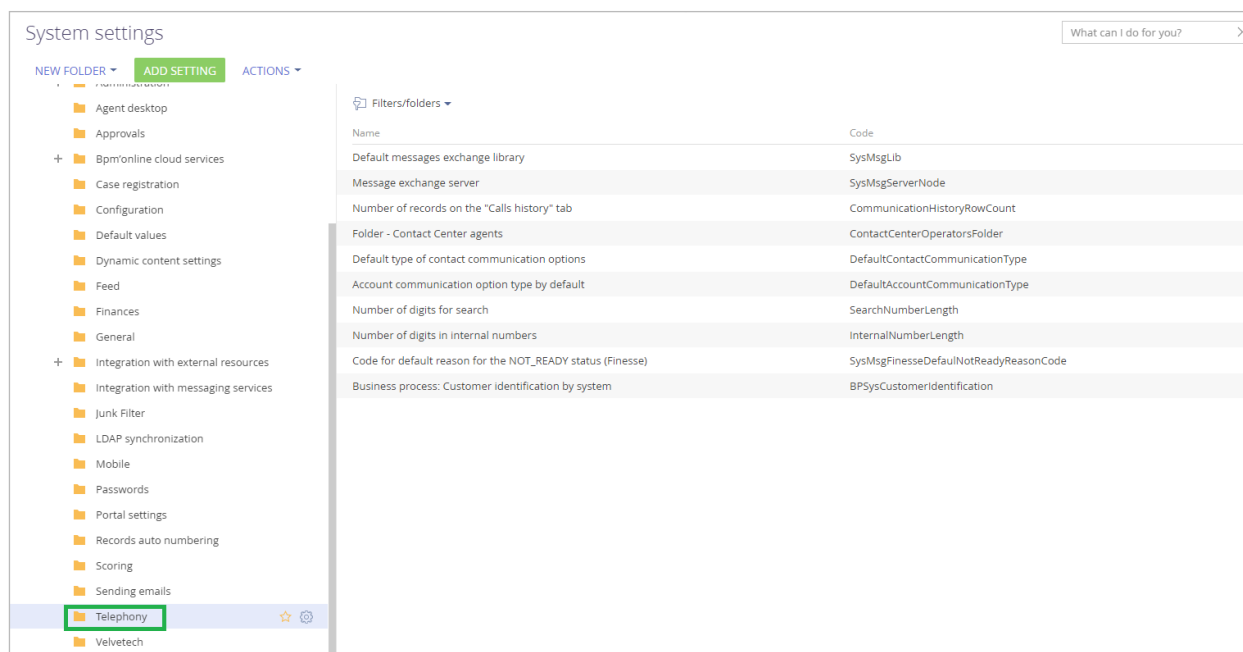
- On the new page, you will see installation section with the domain name. This name is predefined if you are logged into bCreatio as an Admin. Click “Install” button. After that, you should be taken to the Application Installation page.

7. Once you do that, the application should appear among other applications in Installed applications section.

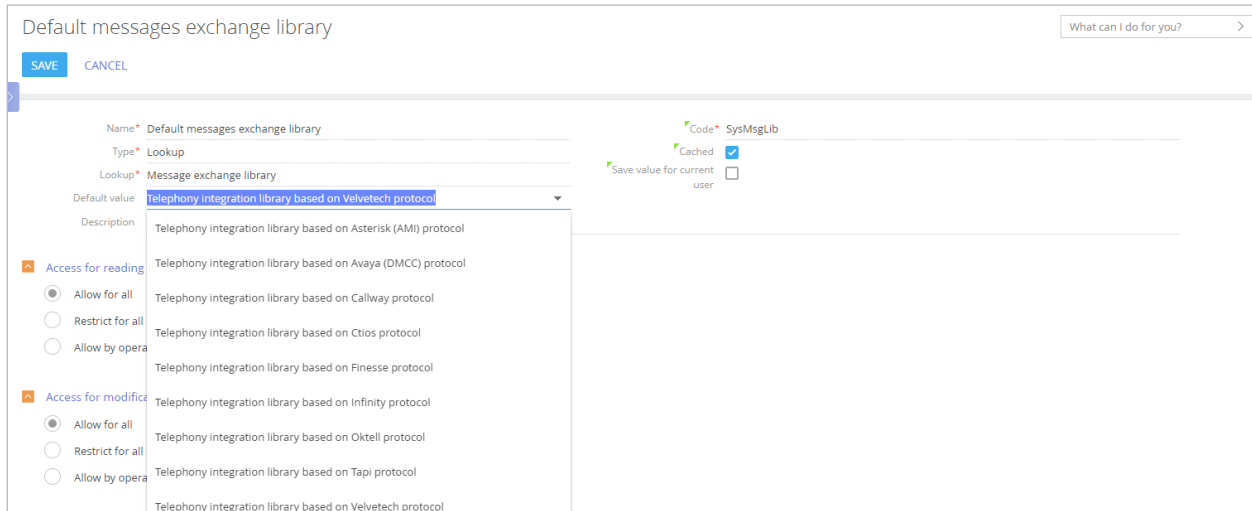


Setting up integration

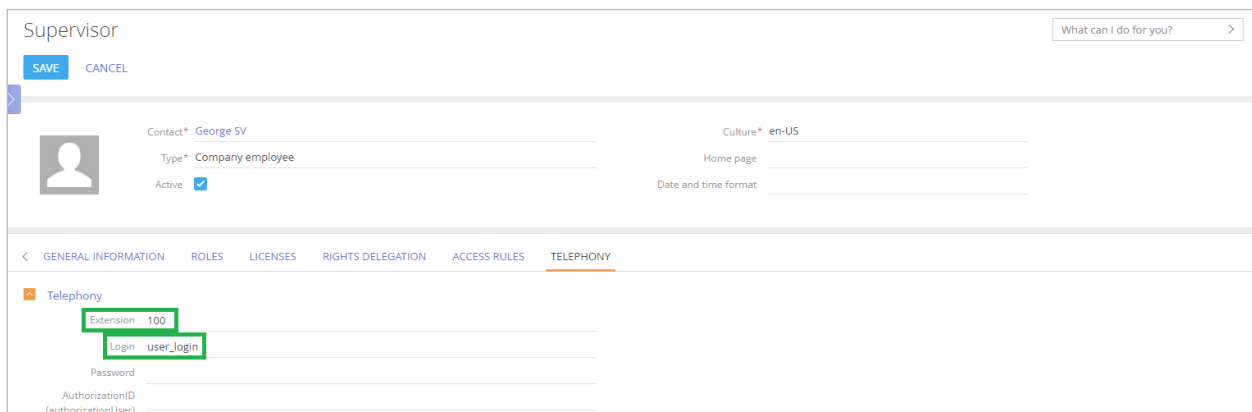
1. If you have non-Velvetech VoIP connector installed on your Creatio instance, please perform the steps below.
 - a. After installing the platform from Creatio, navigate to System Designer -> System Setup -> System Settings and choose "Telephony" section.



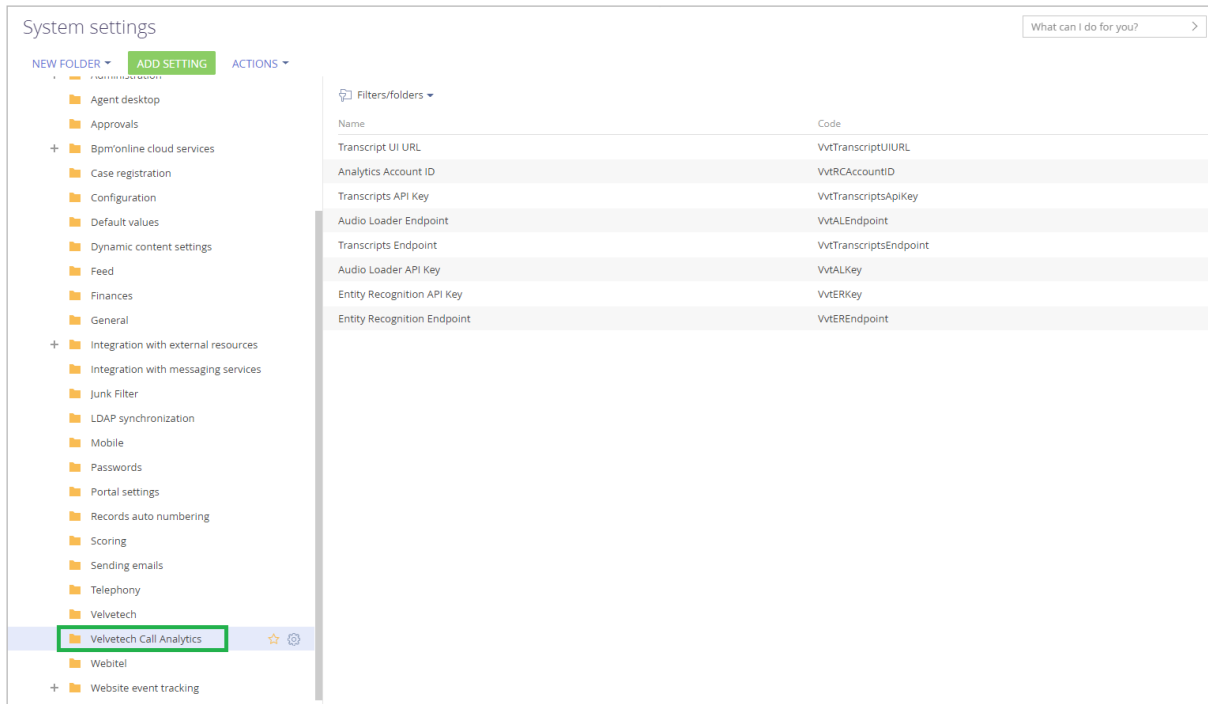
- b. Double-click on “Default messages exchange library” and make sure that after installation, your connector setting is still selected.



2. Fill in the extension and login information for each user of Call Analytics Platform. Navigate to System Designer → System Users.
3. Choose the user you want to enable in Call Analytics platform. Please note, that this user should have Call Analytics platform license assigned to her. Then navigate to Telephony Tab.

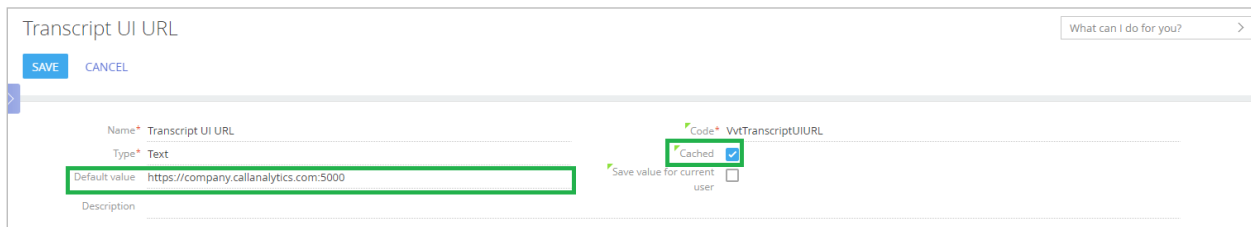


4. Navigate to System Designer → System Settings and click on “Velvetech Call Analytics”.



5. Set the value for the settings in this folder. You should have gotten these settings after you have paid for the licenses needed to use this platform. Please make sure to set “Cached” checkbox for each of these settings.

- a. Transcript UI URL, Audio Loader Endpoint, Transcripts Endpoint, Entity Recognition Endpoint – these settings will be similar to the website URL: <https://company.callanalytics.com:5000> (see example screenshot below).



b. Analytics Account ID (see example screenshot below).

c. Transcripts API Key, Audio Loader API Key, Entity Recognition API Key – these settings will be similar to: 00000000-1111-2222-3333-444444444444 (see example screenshot below).

6. Navigate to System Designer –> Processes –> Process Log. Check that “Download calls information for analytics” and “Download score card” processes are running or completed.

NOTE: It may take up to 5 minutes for them to show up in Process Log.

Title	Package	Version	Owner	Process status	Start date	End date
<input checked="" type="checkbox"/> Download score card	VvCallAnalytics	0	Supervisor	Running	9/26/2019 7:10 PM	9/26/2019
<input checked="" type="checkbox"/> Download calls information for analytics	VvCallAnalytics	0	Supervisor	Completed	9/26/2019 7:10 PM	9/26/2019

7. If you see “Error” status, please double-click on the process.

Process log

ACTIONS

Archived <Start date> till <Due date> Owner Filters/folders

Title	Package	Version	Owner	Process status	Start date	End date
Download score card	VvtCallAnalytics	0	Supervisor	Running	9/26/2019 7:20 PM	
Download calls information for analytics	VvtCallAnalytics	0	Supervisor	Error	9/26/2019 7:20 PM	

OPEN PROCESS DESIGNER EXECUTION DIAGRAM CANCEL EXECUTION

8. Select the step, which has “Error” status and click “Show error description”.

Download calls information for analytics

CLOSE ACTIONS PROCESS DESIGNER

GENERAL INFORMATION

Title: Download calls information for analytics

Process status: Error Owner: Supervisor

Start date: 9/26/2019 7:20 PM End date:

Trace data available:

Process elements: Run item Show error description

Caption	Status	Start date	End date
Call RCAudioLoaderAPI	Error	9/26/2019 7:20 PM	
Start every 5 minutes	Completed	9/26/2019 7:20 PM	9/26/2019 7:20 PM

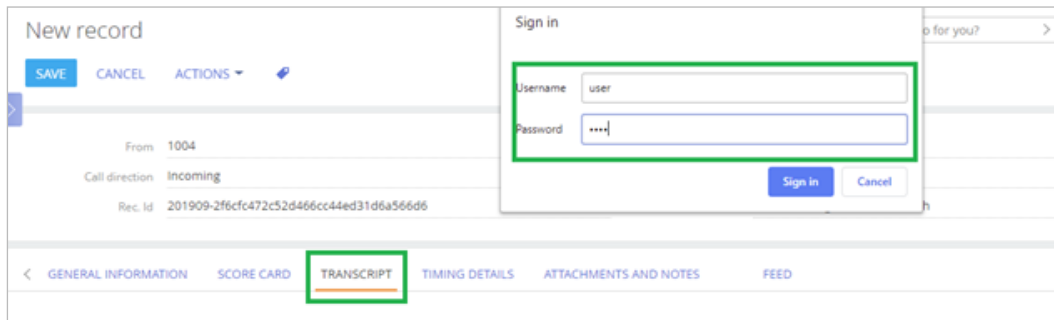
9. You will see the text of the error. If this text contains “The remote name could not be resolved”, please check that you have inserted the System Settings from the previous steps correctly. If it does not help, please contact Velvetech providing the text of the error.

Download calls information for analytics

CLOSE ACTIONS PROCESS DESIGNER

```
System.Exception: Not HTTP exception occurred during API call - The remote name could not be resolved: 'your.company.com'; ; at System.Net.HttpWebRequest.GetResponse at Terasoft.Configuration.VvtGetCalls.RCAudioLoaderAPI.PutCallsFromRCToDB(DateTime from, DateTime to) at Terasoft.Configuration.VvtGetCalls.RCAudioLoaderAPI.PutCallsFromRCToDB(DateTime from, DateTime to) at Terasoft.Core.Process.VvtAutomaticCallDownloadRCMethodsWrapper.ScriptTask1Execute(ProcessExecutingContext context) at Terasoft.Core.Process.ProcessFlowElement.Execute(ProcessExecutingContext context)
```

10. Any user of the Call Analytics Platform can access the “Transcript” tab in the Call object view. However, to view it, a user needs to be logged into the transcript tab by using the credentials provided by Velvetech. The user should save these credentials, as he/she may be prompted for them again.



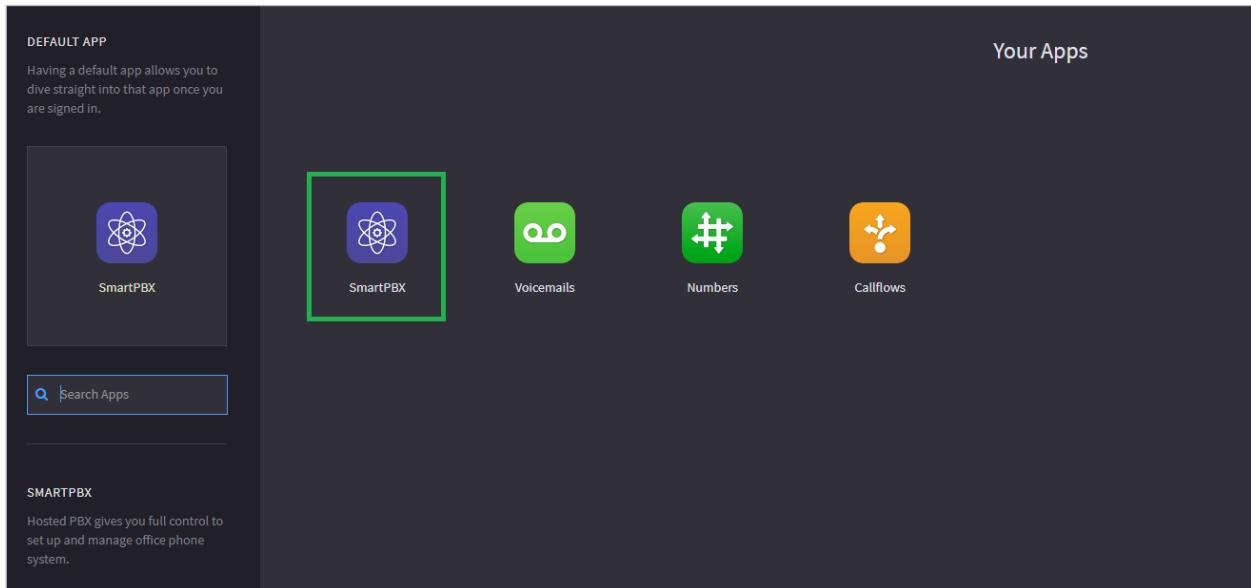
Setting up RingCentral

If you are using RingCentral telephony, in order for the platform to work correctly, additional steps are needed. Please contact Velvetech for further explanation.

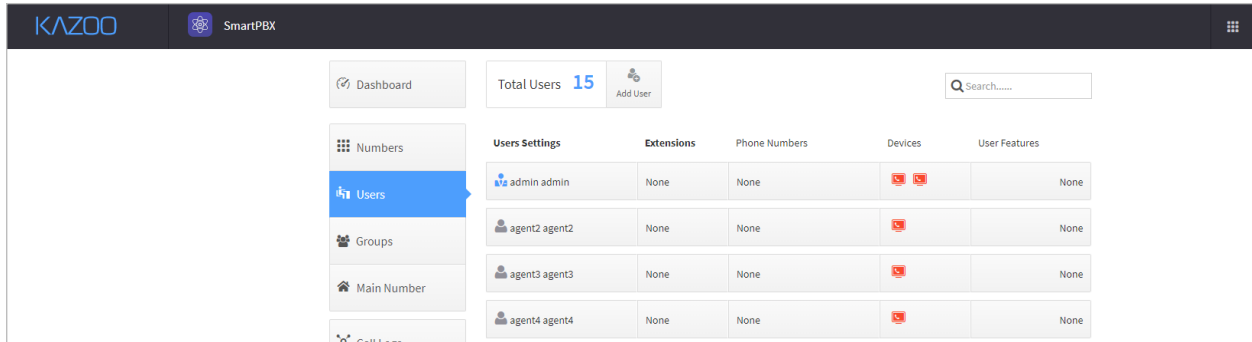
Setting up Kazoo

If you are using Kazoo telephony, in order for the platform to work correctly, additional steps are needed on the Kazoo side.

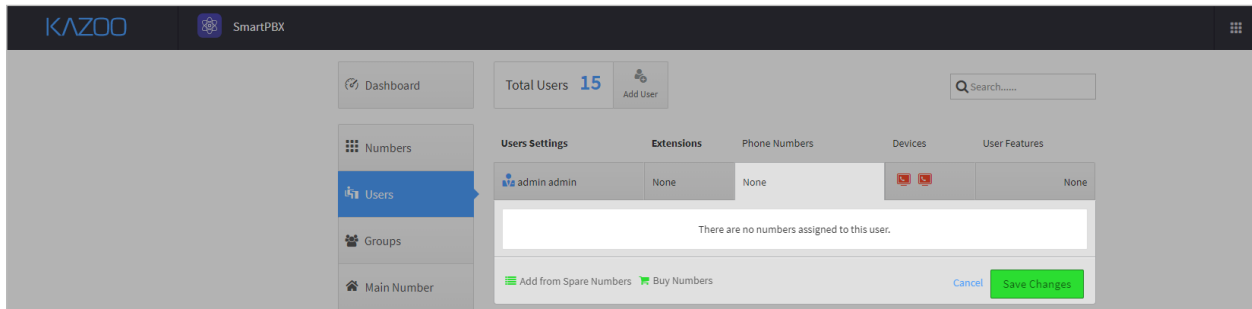
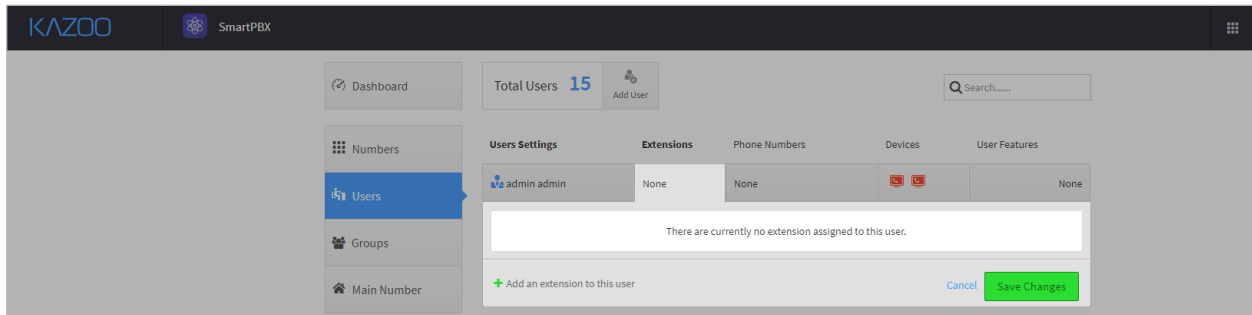
1. Enable SmartPBX in Kazoo:



2. Navigate to SmartPBX -> Users section.

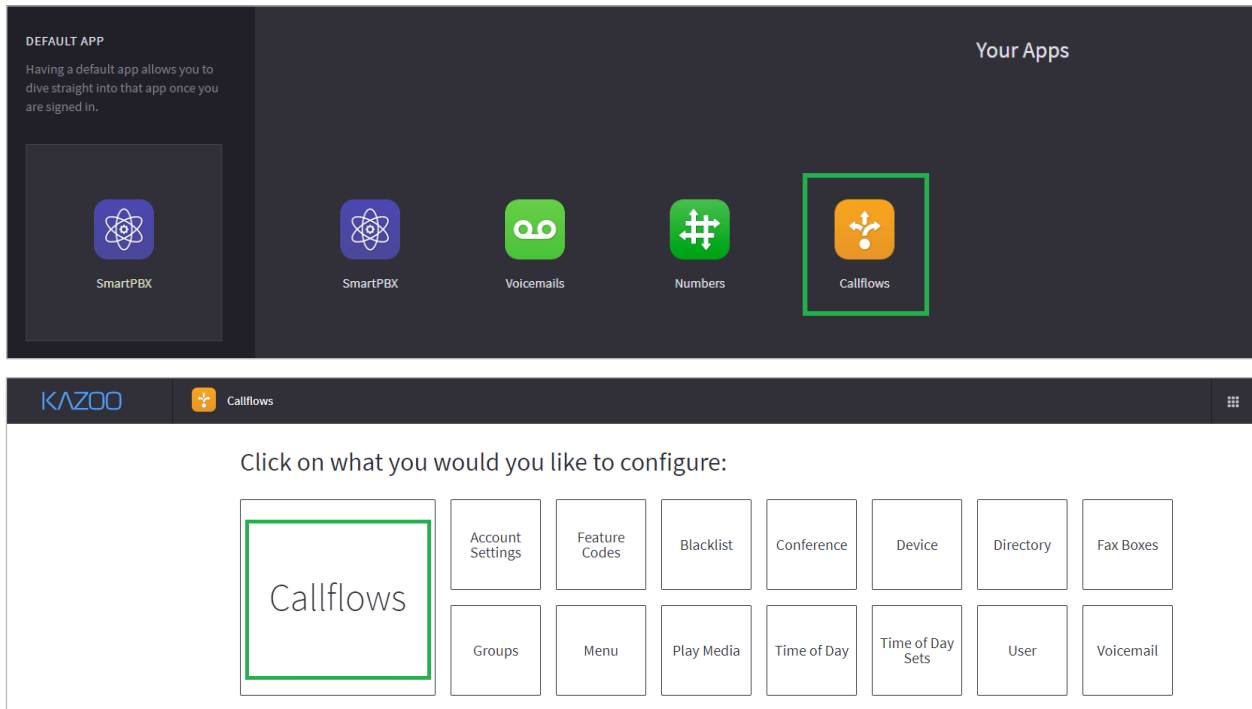


3. Add extensions and phone numbers associated with each user by pressing the row cell under the corresponding column.

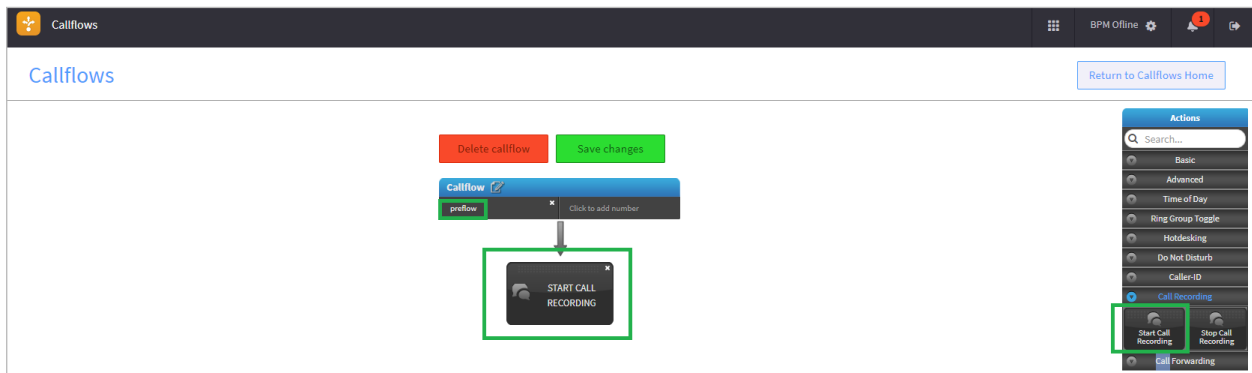


4. Turn on Call recordings in Kazoo.

- a. Click on CallFlows at Your Apps. Select Callflows:



- b. Add the call flow with the special name “preflow” and connect the initial step with the “Start call recording” block from the “Call Recording” block from the tool set on the right of the screenshot:



NOTE: We strongly recommend to add “Stop Call Recording” block before “Voicemail” block in each existing Call Flow.

Using License

The cost of the license can be reviewed in the MarketPlace.

Contact your account manager to acquire the license.

1. To distribute license, go to System Designer -> Installed applications.
2. Search for AI-Powered Call Analytics Platform, click on the name and click on “Licenses” button. You should be taken to the Lisence Manager.
3. You can see your licenses in “Available Licenses” tab.

Available Licenses		Distributed Licenses	
License solution	Start period	Validity period	
bpmonline ITIL service customer portal on-demand	2/1/2016	11/30/2019	
ai-powered call analytics platform cloud	2/13/2018	11/30/2019	
bpmonline studio cloud	2/1/2016	11/30/2019	
bpmonline asterisk connector	2/1/2016	11/30/2019	

4. To distribute the license, go to “Distributed Licenses” tab and choose the name of the app (AI-Powered Call Analytics Platform) in the dropdown menu in “Choose license product name to search” field.
5. When you do that, a list of users whom the license has been distributed to should be shown.
6. In the product column, select checkboxes next to the users’ names to license their accounts (or clear the checkboxes to disable the licenses for specific users).
7. Close the license manager window.
8. As a result, Creatio licenses will be distributed/removed for the specific user accounts.

More info on licensing can be found at <https://academy.creatio.com/documents/administration/7-13/license-distribution?document=studio>.

Use AI-Powered Call Analytics Platform

As mentioned before, the platform provides the users of Creatio with the following capabilities:

- AI-generated call transcripts with dialog visualization, agent/customer identification, timestamps, etc. Each agent's and customer's remark can be played individually, and the whole transcript can be exported to a Word file or copied to the clipboard.
- Calls auto-scoring based on preset criteria, such as account verification or contact details confirmation. The AI component tracks whether a sales rep followed all the steps of a script during a call. A manager can also highlight specific skills used by the agent during the call.
- Call details, including call duration, agent/customer talk time, on-hold time, and time to connect.
- Dashboard with statistics on all calls, grouped by marketing campaigns and accounts, showing conversion rates, top skills, and the overall number of calls.

More info on the features is available at Creatio official documentation:

Managing Calls: <https://academy.creatio.com/documents/base/7-13/managing-calls>

NOTE: The Speaker Diarization feature of AI-Powered Call Analytics Platform will not be enabled by default, as it needs training on the audios of a specific user. After you have used the platform for some time (e.g. a week), please contact Velvetech in order to request the Speaker Diarization feature.