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:

- Al-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-voipconnector-creatio.

#### **Velvetech Contact**

E-mail: info@velvetech.com Phone: 847.559.0864

#### 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.

your@admin.user	
Password	
****	
Account Name	
your_account_name	
Remember me	Forgot your info

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DEFAULT APP Having a default app allows you to dive straight into that app once you are signed in.					Your Apps
SmartPBX	SmartPBX	Voicemails	Numbers	Callflows	
<b>Q</b> þearch Apps					
SMARTPBX Hosted PBX gives you full control to set up and manage office phone system.					

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

🚳 Smart PBX							¢ C	Ļ	۲
🧭 Dashboard	Total Users 87	b User		Q	Search				
<b>WIII</b> Numbers	Users Settings	Extensions	Phone Numbers	Devices	User Features				
ម៉ា Users	💑 acc Admin	None	None	None	None				
📽 Groups	4	None	None		None				
🍘 Main Number	<b>A</b>	None	None		None				
	۵	None	None		None				

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

Smart PBX	Add User and Device	×		
(🕅 Dashboard	Create User		Q Search	
III Numbers	First Name Email used for Login BPM a@a.com Last Name Password		User Features	
ចំា Users	Test		None	
📽 Groups	Main Extension Number 2010		None	
🍘 Main Number			None	
Call Logs	<ul> <li>Create a voicemail box for this user</li> <li>Include User in the Company Directory</li> </ul>		None	
	Send emails to an alternate address		None	
Devices	Send credentials to this user		None	
O Voicemail Boxes	Create User Create User and Add Another		None	

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

Smart PBX						
	🕜 Dashboard	Your Account		Caller ID	Hold Music	<b>O</b> Hours
	III Numbers	Total Users	88			int.
	<b>់កា</b> Users	****	<b>•</b>	Conference Number	-	
	嶜 Groups	₩₩₩₩₩₩₩₩₩₩₩₩ ₩₩₩₩₩₩₩₩₩₩₩	r r	Faxbox Number	-	
	🖀 Main Number	****	<b>m</b> 1	Total Numbers		29
	🔀 Call Logs		́т ф	Assign Spare	ned Numbers Numbers	28 1
	Devices					
	• Voicemail Boxes	Total Devices	118	•	S DID	24
	<ul> <li>Feature Codes</li> </ul>	SiP Phone Cell Phone Burices Hobile	102 15 1 0	• •	S TollFree	5
		Eardline Fax ATA SIP URI		Company Directory Use	rs: 2	2 Download
		Unregistered Devices	107 A	Account Realm yourac	count. cazoo.portal.	com

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- 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".

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4. Click "Choose from Marketplace" from the dropdown menu -> you will be transferred to the Creatio Marketplace.

Installed applications	
ADD APPLICATION -	
Choose from Marketplace	
Install from file	Maintainer
SQL Executor for Creatio	Samarasoft
RingCentral and KAZOO VoIP Connect Creatio	or for Velvetech LLC

5. 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.



6. 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.

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

Installed applications	
ADD APPLICATION -	
Filters/folders ▼	
Name	Maintainer
SQL Executor for Creatio	Samarasoft
AI-Powered Call Analytics Platform for Creatio	Velvetech LLC

#### 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.



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

Default messages exchange library	What can I do for you?
SAVE CANCEL	
Name* Default messages exchange library	Code* SysMsgLib
Lookup* Message exchange library	Save value for current user
Default value Telephony integration library based on Velvetech protocol   Description Telephony integration library based on Asterisk (AMI) protocol	-
Access for reading Telephony integration library based on Avaya (DMCC) protocol	
Allow for all     Telephony integration library based on Callway protocol	
Restrict for all     Telephony integration library based on Ctios protocol     Allow by opera	
Telephony integration library based on Finesse protocol	
Access for modifice Telephony integration library based on Infinity protocol	
Allow for all     Telephony integration library based on Oktell protocol     Restrict for all	
Allow by opera Telephony integration library based on Tapi protocol	
Telephony integration library based on Velvetech protocol	

- 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.

Supervisor	What can I do for you?
SAVE CANCEL	
Contact* George SV Culture* en-US	
Type* Company employee Home page	
Active Date and time format	
C GENERAL INFORMATION ROLES LICENSES RIGHTS DELEGATION ACCESS RULES TELEPHONY	
Telephony	
Extension 100	
Login user_login	
Password	
AuthorizationID (authorizationUser)	



4. Navigate to System Designer -> System Settings and click on "Velvetech Call Analytics".

System settings		What can I do for you?	>
NEW FOLDER - ADD SETTING ACTION	5 -		
Agent desktop	당☐ Filters/folders ▼		
Approvals	Name	Code	
+ 🖿 Bpm'online cloud services	Transcript UI URL	VvtTranscriptUIURL	
Case registration	Analytics Account ID	VvtRCAccountID	
Configuration	Transcripts API Key	VvtTranscriptsApiKey	
Default values	Audio Loader Endpoint	VvtALEndpoint	
Dynamic content settings	Transcripts Endpoint	VvtTranscriptsEndpoint	
Feed	Audio Loader API Key	VvtALKey	
Finances	Entity Recognition API Key	VvtERKey	
📔 General	Entity Recognition Endpoint	VvtEREndpoint	
+ 📔 Integration with external resources			
Integration with messaging services			
📔 Junk Filter			
LDAP synchronization			
Mobile			
Passwords			
Portal settings			
Records auto numbering			
Scoring			
Sending emails			
🖿 Telephony			
Velvetech			
📜 Velvetech Call Analytics 📢	7 (0)		
Webitel			
+ 📔 Website event tracking			

- 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).

Transcript UI URL	What o	tan I do for you? >
SAVE CANCEL		
>		
Name* Transcript UI URL	Code* VvtTranscriptUIURL	
Type* Text	Cached 🔽	
Default value https://company.callanalytics.com:5000	Save value for current user	
Description		



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

Analytics Account ID		What can I do for you?
CLOSE		
	<b>*</b>	
Name* Analytics Account ID	Code* VvtRCAccountID	
Type* Text	Cached 🔽	
Default value 0000000-0000-0000-0000-00000000000000	Save value for current user	
Description		

٦	ranscripts Al	PI Key		What can I do for you?	
L	SAVE CANCEL				
>					
Γ.	Name*	Transcripts API Key	Code* VvtTranscriptsApiKey		
	Type*	Unlimited length text	Cached 🔽		
	Default value	0000000-1111-2222-3333-44444444444	Save value for current user		
	Description				

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.

Process log 🔲 💷					What can I do for you?	>
ACTIONS (2) -						
Archived $\begin{bmatrix} 0 & 0 \\ 1 \end{bmatrix}$ $\begin{bmatrix} 0 & 0 \\ \hline 7 \end{bmatrix}$ $\checkmark$ $\checkmark$ $\checkmark$ $\checkmark$	art date> till <due date=""> <math>  imes </math></due>	🙎 Owner 👻 🖗	] Filters/folders 🔻			
Title	Package	Version Own	ner	Process status	Start date 🗸	End date
Download score card	VvtCallAnalytics	0 Sup	pervisor	Running	9/26/2019 7:10 PM	9/26/2019
<ul> <li>Download calls information for analytics</li> </ul>	VvtCallAnalytics	0 Sup	pervisor	Completed	9/26/2019 7:10 PM	9/26/2019



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

Process log				What can I do for you?	>
ACTIONS 🔻					
Archived $\begin{bmatrix} 0 & -0 \\ 1 & 7 \end{bmatrix} \begin{bmatrix} 0 & -0 \\ \checkmark \end{bmatrix} \checkmark$	<start date=""> till <due date=""> <math> imes</math></due></start>	🙎 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".

D	ownload ca		What can I do for you?						
С	LOSE ACTIONS	✓ PROCESS DESIGNER							
		7.01							
< .	GENERAL INFORMA								
	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 RCAudioLoade	PrAPI	Error	9/26/2019 7:20 PM					
	Start every 5 minut	tes	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	What can I do for you?	>
	CLOSE ACTIONS - PROCESS DESIGNER		
	System Exception: Not HTTP exception occured during API call - The remote name could not be resolved: 'your.company.com'; ; at Ternssoft.Configuration.VvtGetCalls.RCAudioLoaderAPI.PutCallsFromRCToDB(DateTime from, DateTime to) at Ternssoft.Configuration.VvtGetCalls.RCAudioLoaderAPI.PutCallsFromRCToDB(DateTime from, DateTime to) at Ternssoft.Core.Process.PutCalls.RCAudioLoaderAPI.PutCallsFromRCToDB(DateTime from, DateTime to) at Ternssoft.Core.Process.PutCalls.RCAudioLoaderAPI.PutCallsFromRCToDB(DateTissLExecute(ProcessExecutingContext context) at Ternssoft.Core.ProcessFromEment.Execute(ProcessExecutingContext context)	at System.Net.HttpWebRequest	.GetRespo

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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.

New record		Sign in	o for you?	>
SAVE CANCEL	ACTIONS - 🖉	Username user		
From	1004	Password		
Call direction	Incoming		Sign in Cancel	
Rec. Id	201909-2f6cfc472c52d466cc44ed31d6a566d6		h	
< GENERAL INFORMA	TION SCORE CARD TRANSCRIPT TIMING DETAIL	LS ATTACHMENTS AND NOTES FEE	D	



### 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:



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2. Navigate to SmartPBX -> Users section.

KAZOO	SmartPBX							:
		🕅 Dashboard	Total Users 15	User		Q	Search	
		III Numbers	Users Settings	Extensions	Phone Numbers	Devices	User Features	
		屿 Users	💑 admin admin	None	None	<u>o</u>	None	
		嶜 Groups	agent2 agent2	None	None	<u> </u>	None	
		🔗 Main Number	agent3 agent3	None	None	<u>a</u>	None	
			agent4 agent4	None	None	9	None	

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

KAZOO	SmartPBX							
		🕢 Dashboard	Total Users 15	<b>b</b> User		C	Search	
		III Numbers	Users Settings	Extensions	Phone Numbers	Devices	User Features	
		ட்ரை Users	😼 admin admin	None	None		None	
		🖀 Groups		There are cur	rently no extension assigned to thi	is user.		
		Main Number	+ Add an extension to this use	r		Ca	ncel Save Changes	
KAZOO	SmartPBX							
		🧭 Dashboard	Total Users 15	ad User			<b>Q</b> Search	]
		III Numbers	Users Settings	Extensions	Phone Numbers	Devices	User Features	
		ចំា Users	📩 admin admin	None	None		None	
		🐮 Groups		There	are no numbers assigned to this us	ser.		
		🎓 Main Number	Add from Spare Numbers	🐂 Buy Numbers		c	Cancel Save Changes	

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- 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.

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### **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				
enses	bpmonline ITIL service customer portal on-demand	2/1/2016	11/30/2019				
enses	ai-powered call analytics platform cloud	2/13/2018	11/30/2019				
enses	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:

- Al-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.