

Call Center 360 configuration manual

Call Center 360 application provides additional call information and behavior for call operators. It can be configured to show different datasets and execute different behavior to different user roles.

1. Glossary

Agent panel — Additional panel in communication panel list, specified to show extended call data and quick actions for call operator.

Data search strategy — Section that keep configurations for agent panel datasets and behavior, also this section provides a roles filter to separate user roles. Only one strategy at once can be executed to show data in agent panel.

Strategy choosing criteria:

- Roles filter;
- «Active» attribute;
- Strategy type.

Search object (core object) — Strategy parameter that indicates which system object type will be used to seek an abonent (by phone number or other identifier). All datasets will be filtered by found core object. Usually it is "Contact communication option" or "Account communication option".

Strategy element — System object (detail in strategy section), that keeps settings of certain dataset piece to show in panel.

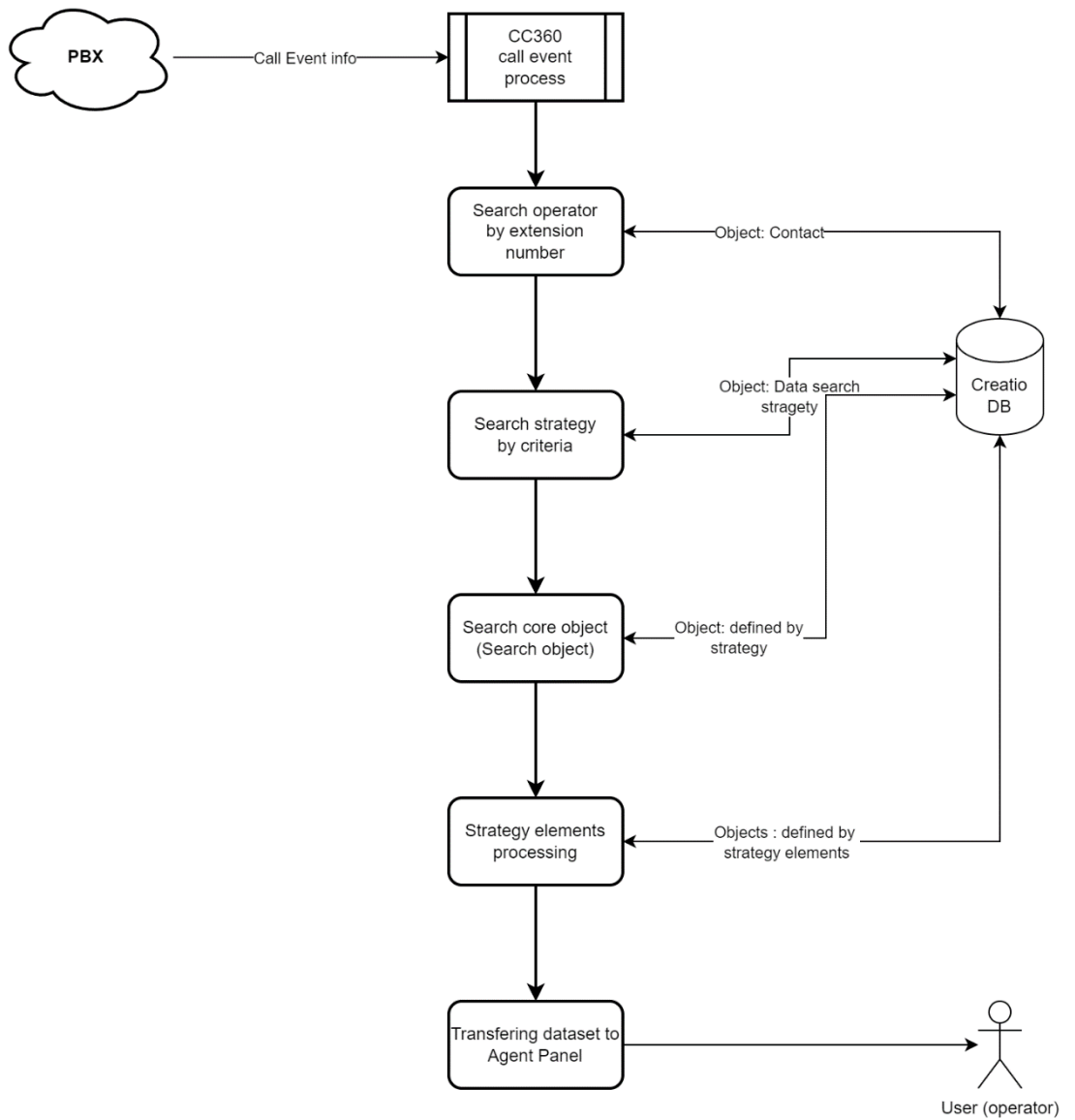
Strategy element object —section (or other object) that will be part of result dataset. Strategy element use filters and columns of chosen object.

Panel block — Agent panel element, that unite and group one or more dataset elements (strategy elements).

List — Agent panel element that show dataset elements in list view. It can be united with other elements in block.

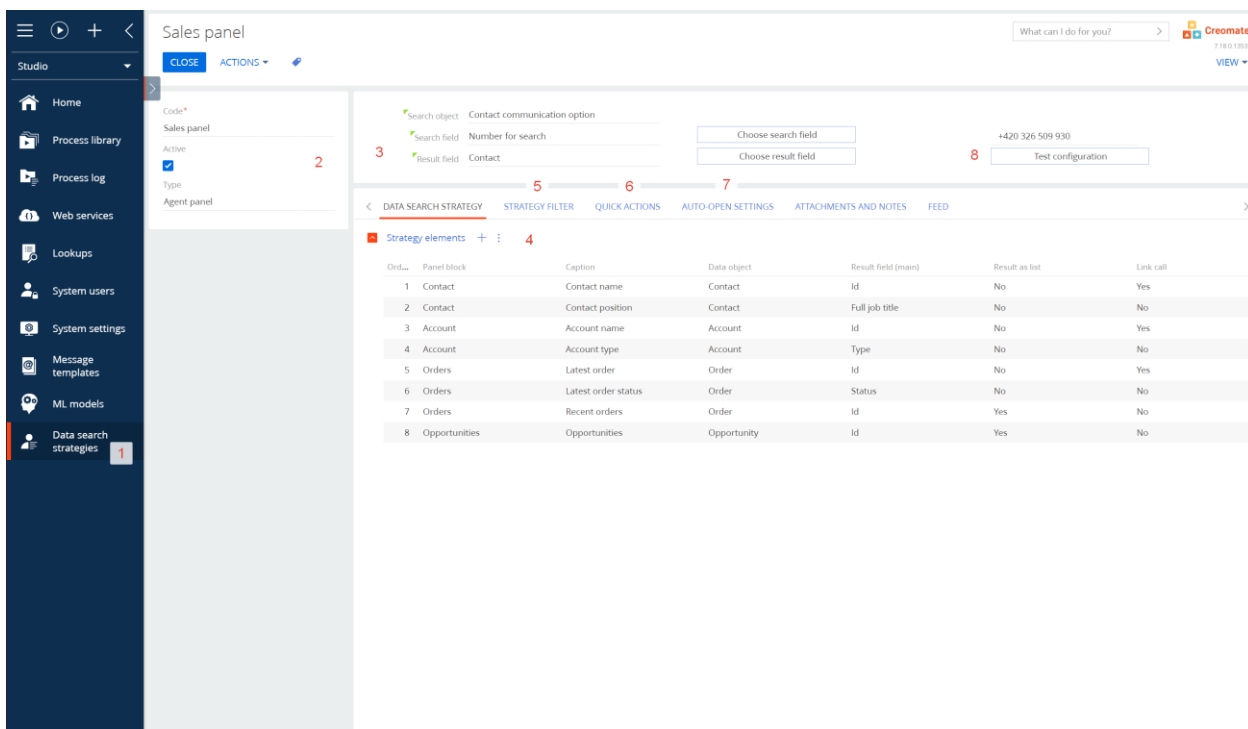
Click-to-call — Function that allow user to initiate outgoing call by clicking on phone number.

2. CC360 general workflow schema



3. Strategy set-up

3.1. Strategy settings interface



(1) Data search strategy section. Section is placed in «Studio» workplace. Keep all Agent panel settings.

(2) General settings.

Code is unique name for strategy. PBX can use this parameter to specify which strategy should be used in certain call.

«Active» attribute allow disabling or enabling certain strategy. It is useful when you creating a new one.

There are 3 types of strategy – Agent Desktop (show data to operator), 3CX CRM Template (returning contact data to 3CX), WhoCalls JSON (return extended data to PBX, it can be used to do complex call routing and prioritization).

(3) Search object settings. This block specifies core object settings, such as object type, where to seek phone number, and which column of found object will be used as a result.

Search object = Creatio section where CC360 will search data (by default is Contact communication option)

Search field = Which column of search object CC360 should use to compare with phone number or identifier (by default is Phone number for search)

Result field = Which column of found object CC360 should use as result value - core object identifier (by default is Contact).

(4) Strategy elements detail. Set of configuration objects that defines the dataset that will be shown to operator, or returned to PBX (if strategy has WhoCalls JSON type).

(5) Strategy filter tab. It has roles details. If user has any of specified role then strategy is valid to use. If there are no roles in detail then strategy can be used by any user.

(6) Quick actions tab. This tab allow you to configure which quick actions (like create object, or run process) will be shown in agent panel.

(7) Auto-open settings tab. Here you can configure CC360 behavior whether (and how) show any pop-up pages on call.

(8) Test configuration. Here you can prompt any test phone number and check how configured strategies worked.

4.2. Strategy element interface

(1) Strategy element general settings.

Strategy = links element to certain strategy.

Data object = specifies filtering Strategy element object (section), that will be used in result dataset. Determines filters and columns in [Data filtering block](#).

Order = specifies index number of this element.

(2) Strategy element additional settings.

Caption = Caption for this element in dataset.

Element type = **Deprecated attribute, will be removed soon. Always use "Search data" value.**

Panel block = Text field to specify what block will be used to show this element. (Elements with the same block name will be grouped)

Link call with found data = If Call object has column with the same name as data object, the found value will be saved in call column. This attribute works only if result field is Id.

(3) Data filtering block

Comparison field (main) = Which column of data object should be equal with core object result field (strategy's search object). This parameter is required only when there are no advanced filtering.

Result field (main) = Which column of data object should be used as result to show in panel or returned to PBX. If there are an "Id" column then this value will be shown as link with object's display value caption.

(4) Advanced filtering. Only active when "Use advanced filtering" attribute is true. Allow to configure complicated filters like advanced filtering in sections.

To filter with core object you should use “Id” column in search, if Id column is chosen then [IDENTITY] macros will automatically set in comparison field.

If you have to filter data using additional search results – you should manually use [ADDITIONAL] macros in comparisons.

- (5) Additional search block. This optional block you can use to pre-filter any data (even from other sections) to strategy data objects.

Data object (additional) = Data object that will be used in additional search.

Other fields are similar to data filtering block.

Additional search result is available in macros [ADDITIONAL] to use it in main data filtering block’s advanced filter.

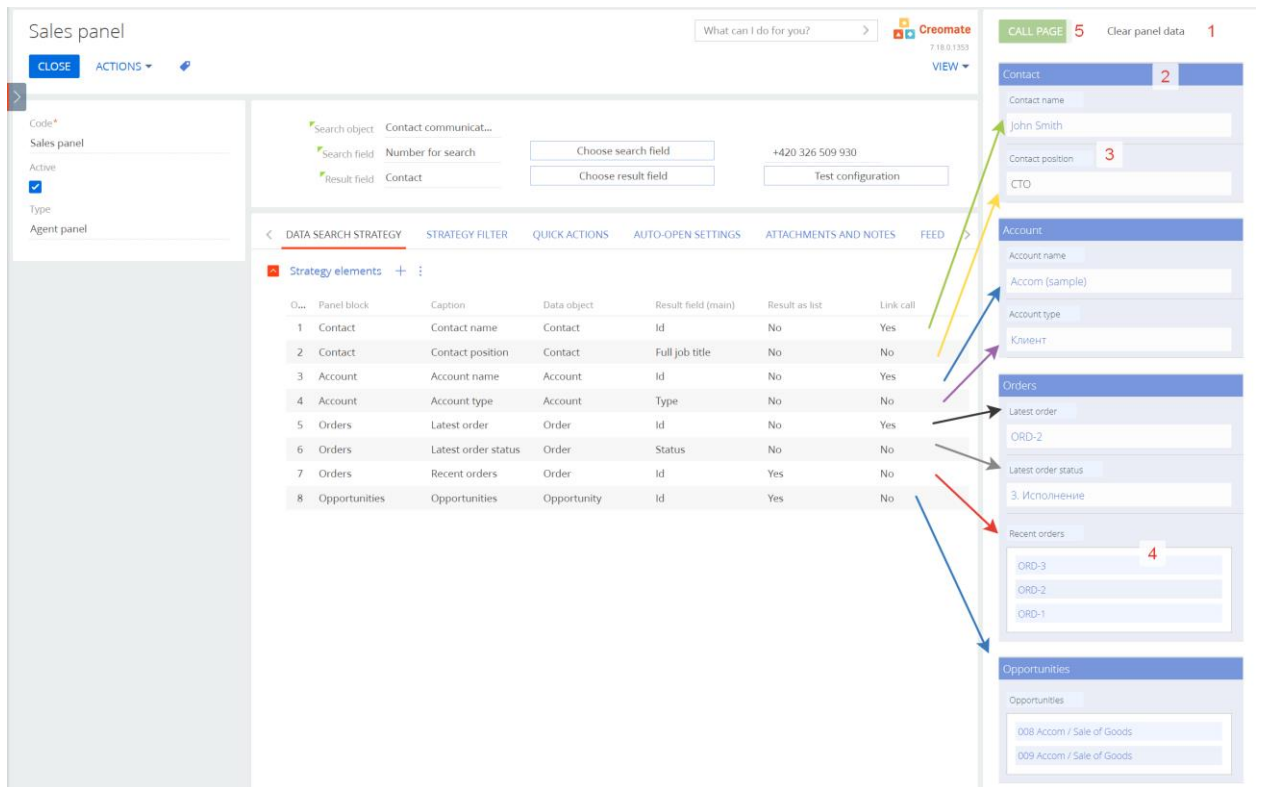
Sorting capabilities allow you to get certain object from possible objects set.

- (6) List attribute. Use result of strategy element as list.

By default, the result of strategy element is just one element. If you need to show in agent panel some list of objects, you should use this attribute.

To prevent messing up panel content, only top 5 values will be shown in agent panel.

4.3. Agent panel interface.



(1) Clear panel button.

(2) Panel block with caption Contact. This block group two strategy elements (contact name and position)

(3) Strategy element caption. This strategy element has "Contact position" caption.

(4) Strategy element that show a list of value. In addition, this block "Orders" groups 3 different strategy elements

(5) Call page button. Provides fast access to current call page.

4.4. Quick action set-up

The screenshot displays the 'QUICK ACTIONS' configuration page. It includes a navigation bar with tabs: DATA SEARCH STRATEGY, STRATEGY FILTER, QUICK ACTIONS (active), AUTO-OPEN SETTINGS, ATTACHMENTS AND NOTES, and FEED. The main content area is divided into two sections:

- Quick actions: create object**: A table with columns 'Caption', 'Strategy', and 'Section'.

Caption	Strategy	Section
Create order	Sales panel	Order
Create opportunity	Sales panel	Opportunity
Create invoice	Sales panel	Invoice
- Quick actions: run process**: A table with columns 'Caption', 'Strategy', and 'Business process'.

Caption	Strategy	Business process
Approve order	Sales panel	Order approval

On the right side, there are several panels: 'Account' (with fields for Account name and Account type), 'Orders' (with fields for Latest order and Latest order status), and 'Opportunities' (with a list of opportunities). A vertical sidebar on the far right contains icons for user profile, messages, chat, and notifications. At the bottom right, there is a list of quick actions: 'Create order', 'Create opportunity', 'Create invoice', and 'Approve order'.

CC360 provide quick actions for agent panel. You can configure quick action to create certain objects or run processes.

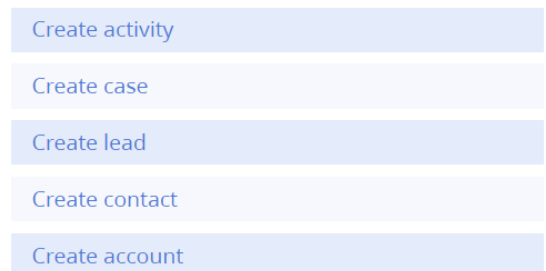
For create object quick action you should choose any system section.

Process that will be ran through quick action can accept "Call" parameter that contains Id of current call. Any found strategy data could be saved in call object by "Link call with found data" attribute in strategy element. (described in paragraph 4)

CC360 package has example of process that use Call parameter (OmniTestProcess schema).

By default you can use default quick action list, such as:

- Create new activity
- Create new case
- Create new lead
- Create new contact
- Create new account



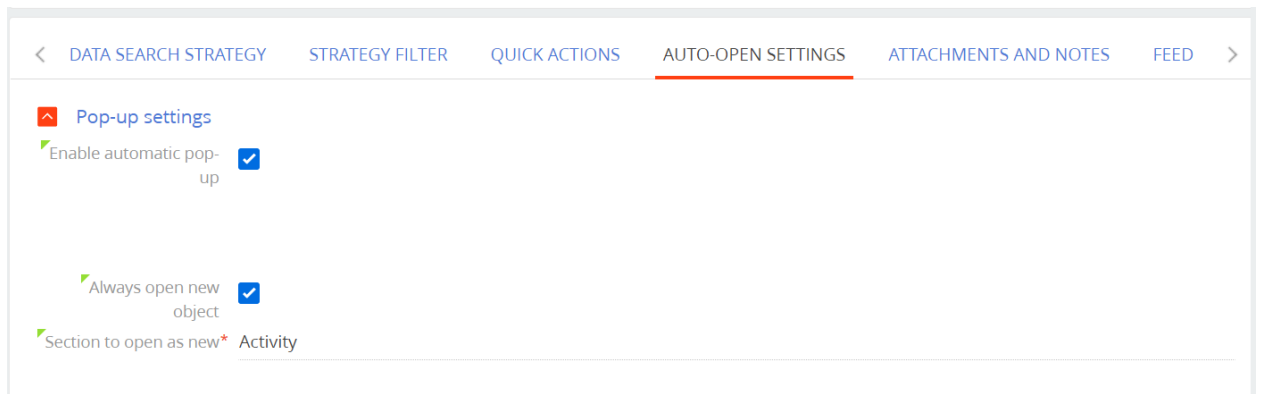
4.5. Auto-open pop-up settings.

CC360 provides automatic pop-up function. You can use it to open certain page to operators when they receiving/making call.

- To activate pop-up function you should tick “Enable automatic pop-up” attribute (1);
- You can open any found strategy element data, that has “Id” result value (2);
- If chosen strategy element was not found any data, you can create new object. (3). In this case, if latest order was not found then new order page will be opened.
- If CC360 was not found the abonent, this setting can open some object in creation mode. It can be used to open new contact page to rapidly register unknown abonent (4);
- You can always open certain new page. It can be used in cases where operators should create and fill activity on every call they make (5);
- Section to open in attributes (4) и (5), should be specified in field 6.

Example 1 — Automatically open latest order page. If order was not found then open new order page. If abonent was not found then open new contact page

Example 2 —Open new activity page on every call. Notice that other options are not available when “always open new” is ticked.



The screenshot shows a software interface with a navigation bar at the top containing the following tabs: DATA SEARCH STRATEGY, STRATEGY FILTER, QUICK ACTIONS, AUTO-OPEN SETTINGS (which is underlined in red), ATTACHMENTS AND NOTES, and FEED. Below the navigation bar, there is a section titled "Pop-up settings" with a red close icon. Under this section, there are three settings:

- Enable automatic pop-up:
- Always open new object:
- Section to open as new*: Activity

4. Strategy element settings example.

In this example, strategy element will return to result dataset the data from Case object in (1). Result caption will be “Latest case subject”, and it will be put in “Case” block (2).


The result field is Subject (3). There are advanced filtering, which compares Case.Id with [ADDITIONAL] macros.

[ADDITIONAL] macros is the result from additional search, which is activated by attribute (5).

Additional search also uses Case as data object; it has sorting by “Registration date” to get the latest case.

In additional search advanced filters, we have filtering by nested object to find cases with core object contact id (6); also we have filtering by case status, which shouldn't be final.

Sales panel / Strategy element

What can I do for you? >  7.18.0.1353

SAVE CANCEL

Strategy*

Sales panel

Data object*

Order 1

Order

8

Caption

Last opportunity orders list

Element type

Search data

Panel block

Opportunity

Link call with found data

Test phone number

Test configuration

Comparison field (main)

Result field (main) Id 3

Use advanced filtering

Sort column _____ Sort direction _____

Result as list

Choose comparison field

Choose result field

Choose sort field

Advanced filters (main)

Opportunity.Id = [IDENTITYZ] 4

AND Contact.Id = [IDENTITY]

+ Add condition

Use additional search

Data object (additional) Opportunity 5

Result field (additional) Id

Comparison field (additional) _____

Sort column (additional) Created on

Sort direction (additional) Descending

Choose result field

Choose comparison field

Choose sort field

Advanced filters (additional search)

Account.Contact (by column Account) exists

AND Id = [IDENTITY] 6

OR Contact = [IDENTITY]

+ Add condition

In this example, the element returns list of orders that linked with latest opportunity of current abonent's account, where abonent is contact.

(1) Element data object is Order.

(2) Caption is Last opportunity orders list.

(3) Element result field is Id, advanced filtering is on; "Result as list" attribute is ticked.

(4) In main advanced filters we have two conditions – Order's contact must be equal with our core object, which is contact id; Order's opportunity must be equal with opportunity that will be found in additional search.

(5) Additional search data object is opportunity. Result field is Id, sorting is on creation date by desc order.

(6) Additional search advanced filters is nested filtering by Opportunity.Account.Contact.Id **OR** opportunity itself has equal contact id.

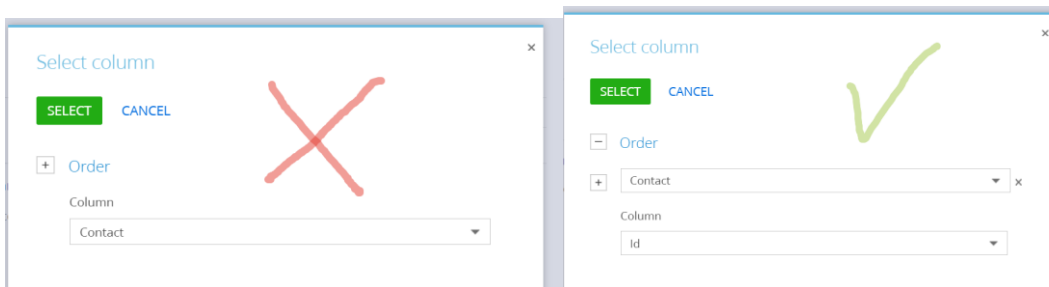
5. Filter usage recommendations

6.1. It is not recommended to use default “count” filtering type. In cases where it is possible you should use “exists” filter type.



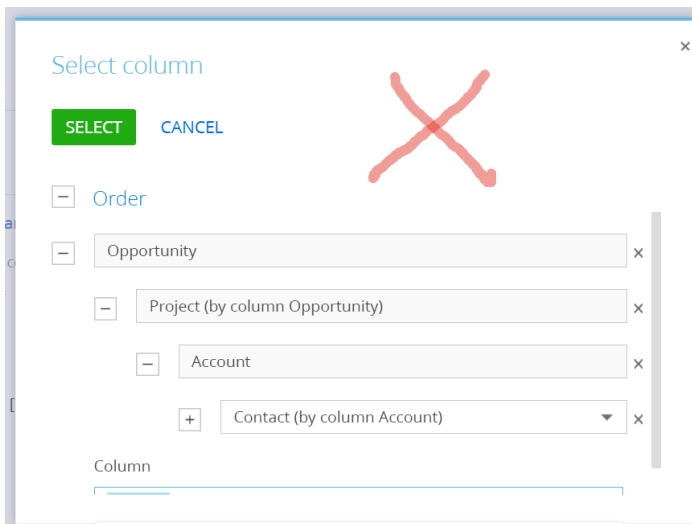
Count filter type causes significantly more load on system, especially in sections with many entities.

6.2. To compare values with macros like [IDENTITY] or [ADDITIONAL], you should use nested Id column, instead of column value itself.



6.3. It is not recommended to use more than two times nested objects. If it is possible, the better way to make such filters is to use additional search.

Multiple nesting causes huge load on system DB.



6. Operator search settings

7.1. CC360 search operators by the extension phone number. By default, it is a Contact communication option type "Extension number".

In some cases, you may need to change this communication option type (for example if you have conflicts with client contact's extension phones").

In this case, you could change system setting "Phone number type for search" to existing or new communication option type.

7.2. If you use manually created communication option type you **must** disable system setting "Reverse internal number for search" because Creatio saves number for search reversed in default options, but for custom options, it saves search number in direct order.

7. System setting value

CC360 can receive call information in two modes:

- CTI integration - internal integration with installed telephony connector via CTI Panel (can be used with telephony systems like Asterisk, Webitel, Amazon Connect etc.)
- API Integration – telephony integration via universal external API (can be used with telephony like 3CX and other systems that don't have native connectors)

You should use different settings in both modes.

System setting code	CTI integration value	CC360 API integration value	Comment
OmniWhoCallsToken	Generates automatically during installation process		API token. Generates automatically during installation process. Custom token should follow these rules: <ul style="list-style-type: none"> • Have at least 45 symbols • Have lower case and upper-case letters • Have digitals
OmniUseCallProcessing	False	True	This setting determines type of communication between CC360 and telephony system. Default type of communication is based on existing CTI integration in Creatio (False value). For those telephony systems that don't have connectors for Creatio you should use True value.
Omni3CXURL	-	Telephony service URL	Telephony API URL. This API only will be used in CallProcessingMode (without CTI integration) to initiate outgoing calls. (if setting OmniUseCallProcessing is False, then should be empty)
OmniPhoneNumberTypeForSearch	Extension number	Extension number	Contact communication option type that will be used during agent search. Set by default, can be changed if you use custom communication options in your system.
OmniReverseInternalNumber	True	True	If you set custom communication option in previous setting you

			should change this value to false. In any other case this setting must be "True"
OmniPOSTMakeCallQuery	-	Varies on certain telephony system	Only for API integration. Determines what type of HTTP query will be used during MakeCall request to telephony system. True = POST False = GET
OmniCallRecordingSaveMode	-	False	Only for API integration. Determines storage type for call recordings and playback. True = download call recordings and link as file to call False = Store only links and do a playback directly from telephony system's storage via API It is recommended to use second (False) variant.
OmniMangoService	False	False	Deprecated setting. To be removed.