

# 5.3 Service in Time - Voice and Chat Report

## Bright Pattern Documentation

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# Service in Time Report

This report provides main key performance indicators for selected inbound services with breakdown of the requested reporting interval into lower-level reporting intervals (e.g., weekly/monthly reports will show metrics for each day of the week/month, daily reports will show metrics for each hour of the day).

All interaction-related metrics in this report are calculated for call and chat media types. For email service metrics, use the [Email Service Report](#).

**Note:** If you run service reports for time periods when you had old or discontinued services, the names of these services will be displayed; this includes deleted services. The reports for these time periods will show that you had interactions as well as the service names you had at that time. Note that if you do not have any activity on these services within 30 days, the system will display the service names in italics; the system will not show the names at all after 90 days without activity.

## Metric Descriptions

### Number of Calls

This is the total *number of calls* that requested this service in the given reporting subinterval.

### In Service Level %

*In Service Level %* is the percentage of calls to this service that were answered within the [predefined service level threshold](#) relative to all answered or abandoned calls except the calls abandoned within that threshold.

### Max Agents

*Max Agents* is the maximum number of agents possessing this service skill who were logged on simultaneously within the given reporting subinterval.

### Min Agents

*Min Agents* is the minimum number of agents possessing this service skill who were logged on simultaneously within the given reporting subinterval.

### Occupancy %

*Occupancy %* is the percentage of time that agents spent handling calls to this service, including after call work, relative to the total working time (i.e., the time spent handling calls to this service including after-call work and time in the *Ready* state).

### Overflow Calls %

*Overflow Calls %* is the percentage of calls to this service that were routed to [overflow destinations](#).

## Self-Service Provided

The Self-Service Provided scenario block tells reporting that a self-service function was used by the caller during the call. Placing this block in the scenario marks the interaction as successfully served by the interactive voice response (IVR) portion of the voice scenario or automated forms of the chat scenario. The Self-Service indicator is stored in the call detailed records and can be used in reports to distinguish the calls successfully that were served by an IVR from the calls that were simply abandoned by callers at that stage of processing.



Scenario Builder Self-Service Provided scenario block

## Find Agent

In the Scenario Builder application, the Find Agent scenario block finds an agent qualified to handle a given interaction. When the agent becomes available, the block creates a variable called *\$(destination)* and sets it to the agent's phone number (for voice) or username (for chat). Note that [Omni-Channel Routing](#) settings may determine the frequency with which certain interaction types are routed to your agents.

Find Agent scenario block

### Important:

The [Connect Call](#) or [Connect Chat](#) block should be used immediately after the Find Agent block to connect the interaction to the identified agent.

For example, the scenario should proceed in the following way:

1. The scenario collects data from a caller.
2. Based on the collected data, the scenario determines the qualifications necessary to handle the call.
3. The scenario uses the Find Agent block to find an agent with the necessary qualifications (e.g., Peter at extension 151).
4. That agent's extension is stored internally in the *\$(destination)* variable. In this example, the variable is set to 151.
5. The scenario uses the Connect Call block to distribute the call to the number stored in the *\$(destination)* variable.

Note that the block properties will be different depending on whether it is used in a voice or a chat scenario.

# Settings

## Title text

*Title text* is the name of the instance of the block. Enter a name in the text field and click the Update button at the bottom of the Edit pane. The new name of the block appears in the flowchart.

## Agent skills required

You can select the *agent skills required* for handling the interaction.

## Wait condition

The agent selection rule is expressed as a sequence of escalation intervals with different agent selection criteria defined for each. The term "escalation" implies that each subsequent interval will normally have less stringent selection criteria, thus increasing the probability of finding an agent available to attend to the waiting interaction.

If there are multiple conditions specified in the escalation interval, ALL conditions must match for an agent to be considered. A set of conditions in each interval is independent from conditions in other intervals.

## add Interval

Any number of escalation intervals can be defined within the expression. The last interval can be finite or infinite (leave the end time empty to use an infinite interval). To specify an interval, first define its length. Then click **add** to define your agent selection condition for this interval, which are as follows.

- **Skill from skill group** – This condition matches the interaction to qualified agents according to skill requirements specified in the preceding [Request Skill or Service](#) blocks. This is the condition that is normally used for skill-based routing. You can define multiple skill groups within the same interval. A minimum acceptable skill level must be assigned to each skill group.
- **Specific skill** – This condition matches the interaction to qualified agents according to an explicitly specified skill. This option can be used instead of the option *Skill from skill group* in simple scenarios without IVR-based service/skill selection. You can define multiple skills within the same interval. A minimum acceptable skill level must be assigned to each skill group.
- **Specific skill from variable** – This condition matches the interaction to the skill in the specified variable. It can be used as a logical extension of the *Specific agent* option. If a specific agent does not become available within the first interval, the interaction can then be routed to a group of agents who share a particular property with that specific agent (e.g., work in the same office). Such a property can be represented by an [auxiliary skill](#). You can obtain this skill and store it in the specified variable using the property **Skill name** of the [Get User Configuration](#) block. This option will ignore any skills requested by the interaction and any agents' skills except the one identified by this variable.
- **Region** – This condition matches a customer's region to a user with the same region. If no region is found for the customer, the interaction will be routed to any user; if no user region is set, the user is matched to any interaction. Note that this condition may be combined with other conditions except with the *Agent currently handling this customer* condition.
- **Specific agent** – This condition matches the interaction to the specified agent (e.g., the agent who handled the previous interaction with the same customer). The variable's value must be the agent's global identifier in the system configuration (see property **User ID** of the [Get User Configuration](#) block). This option is available

for the first interval only. If the specified agent is logged out, the next interval will be tried immediately. This option will ignore any of the skills requested by the interaction and any skills possessed by the specified agent.

- **Agent currently handling this customer** – This condition matches the agent currently handling the same customer in another type of interaction. For example, during a phone call with an agent, the customer sends an SMS message; the SMS is delivered to the same agent.

## Overflow call handling starts at

This setting defines at which escalation interval the identified agent will be considered an overflow destination, unless his skills/levels match the skill/level requirements of the preceding escalation intervals.

## HTML code

*HTML code* defines the HTML page that the customer will use during the chat session. This setting applies to chat scenarios only.

## Initial Message

For chat scenarios only (see image below), the *initial message* (i.e., first periodic message) is sent in 5 seconds after the interaction enters the queue, and subsequent periodic messages are sent according to the configured timeout, until the interaction leaves the queue.

## Periodic Message

For chat scenarios only (see image below), the *periodic message* is used to send a periodic regular text message in the same way that the [Send Message](#) block does. For example, the periodic message could include [variables](#) that provide the customer information about EWT or placement in queue.

## Escape button

The *Escape button* is the key on the telephone keypad (0-9, \*, or #) that a caller can press to exit the queue. When the caller presses the escape button, the scenario executes the Escape Digit conditional exit. Typically in such situations, the scenario sends the caller to a voicemail or terminates the call. This setting applies to voice scenarios only.

## Keep call in queue

If selected, the scenario will keep the call in queue even if there are no agents currently logged on. If not selected, the No Agents conditional exit will be used. This setting applies to voice scenarios only and finite intervals only. It does not apply to the condition Specific agent.

## Virtual Queue option

The *Virtual Queue option* allows the callers to request a callback instead of waiting for an agent in the queue. Calls that requested callbacks will be waiting in a virtual queue. The decision to offer the callback option is made based on the call's estimated wait time (EWT) in queue. If a caller selects this option, the Callback exit is taken. This exit would normally lead to a [Request Callback](#) block where the caller's original inbound call will be disconnected while his position in the service queue will be preserved. The callback is made when it is the caller's "turn" to be routed to an agent. Note that the callback option must also be enabled in the [general properties of the corresponding service](#).

To enable the *Virtual Queue option*, select the **enable if EWT is greater than** checkbox and specify the threshold EWT; the Virtual Queue option will be offered only if the Estimated Waiting Time for a given call exceeds this threshold value. Specify the Callback button (i.e., the phone key that the caller will have to press to select the Virtual Queue option) to request a callback instead of waiting in the queue. If the Virtual Queue option is selected, the Callback conditional exit will be executed, allowing the scenario to collect the callback data and place the call in the virtual queue (see block [Request Callback](#)). The Virtual Queue option applies to voice scenarios only. For more information, see the [Virtual Queue Tutorial](#).

## Periodic reminder - repeat every

This setting allows you to specify the number of seconds you want the scenario to wait between playing the Periodic Reminder prompt. Set this field only if you want the scenario to play the Periodic Reminder prompt. Enter 0 if you want to disable this feature. This setting applies to voice scenarios only.

## Other reminders

This setting allows you to configure one-time prompts to play at specific times (i.e., in seconds); note that these prompts do not repeat. This setting applies to voice scenarios only.

## Keep playing hold music while ringing on agent

If selected, the *Music on hold* will continue after the Find Agent blocks exits; the prompt is stopped only when the subsequent [Connect Call](#) block actually connects the caller to the destination (destination answers). Otherwise, the caller will hear the ring-back tone from the moment the call is delivered to the agent and until the agent answers. This option only works if the block actually finds an agent; for all conditional exits, the hold music stops immediately. This setting applies to voice scenarios only.

## Conditional Exits

The Find Agent block may take one of the following conditional exits: No Agents, Queue Limit, Escape Digit, Callback, or Timeout.

### No Agents

The *No Agents* exit is taken if no agents with matching skills are logged in (or when the last such agent logs out before the call is routed.)

### Queue Limit

Your service provider may have set up a limit for the number of items you can have queued for distribution to agents simultaneously (for all services combined). If an interaction processed by the given scenario exceeds this limit upon entering the queue, the *Queue Limit* exit will be used. Note that a repeated attempt to place the interaction in the same queue will result in the termination of the scenario.

### Escape Digit

The caller presses the escape digit to exit the queue. The *Escape Digit* exit will be displayed only if the *Escape button* setting is defined (see below). This exit applies to voice scenarios only.

### Callback



The *Callback* exit will be taken if the *Virtual Queue* option is offered to and is accepted by the caller. This exit applies to voice scenarios only.

## Time Out

The *Time Out* exit will appear only if you define one or more escalation intervals for *Agent skills required*, provided that the last interval is finite. The Time Out exit will be taken if the last interval expires before any agents with matching skills become available. Note that if the last matching agent logs out before the timeout expires, the No Agents exit will be taken.

## Prompts

The Find Agent block can play any of the following prompts for the caller: Music on hold, Initial Prompt, EWT Announcement, Virtual Queue availability announcement, or Periodic reminder.

### Music on hold

The scenario plays the *Music on hold* prompt while the call is in queue. If not defined, the [default Hold and queue music treatment](#) will be played. The *Keep playing hold music while ringing on agent* parameter controls when the music is stopped.

### Initial Prompt

If defined, this optional *Initial Prompt* will be played to the caller as soon as the call is placed in queue (i.e., before the *Music on hold* starts).

### EWT Announcement

The voice scenario plays the *EWT Announcement* when providing the estimated wait time (EWT) to the caller. The scenario uses the system to read the actual EWT, which is received by variable  $\$(item.EWT)$ .

For example, the prompt announces *The estimated wait time is*, and then the system announces the EWT, such as *eight minutes*.

### Virtual Queue availability announcement

The *Virtual Queue availability announcement* prompt is played to callers to offer them an option of requesting a callback instead of waiting in the queue. See the description of the *Virtual Queue option* for details.

### Periodic reminder

The scenario will periodically play the *Periodic reminder* prompt to the call in queue at the frequency you set in the *Periodic reminder - repeat every* field. If you do not set this prompt, the reminder does not play. You can use the *EWT Announcement prompt* as a reminder prompt.

### Keep playing hold music while ringing on agent

The scenario plays the *Music on hold* prompt while the call is in queue. If not defined, the [default Hold and queue music treatment](#) will be played. The *Keep playing hold music while ringing on agent* parameter controls when the music is stopped.

### Play random segment

The *Play random segment* option offers variety of queue [audio treatments](#) for voice calls, allowing you to vary the audio treatments played while waiting in the queue.

## Find Agent

In the Scenario Builder application, the Find Agent scenario block finds an agent qualified to handle a given interaction. When the agent becomes available, the block creates a variable called  $$(destination)$  and sets it to the agent's phone number (for voice) or username (for chat). Note that [Omni-Channel Routing](#) settings may determine the frequency with which certain interaction types are routed to your agents.

Find Agent scenario block

### Important:

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For example, the scenario should proceed in the following way:

1. The scenario collects data from a caller.
2. Based on the collected data, the scenario determines the qualifications necessary to handle the call.
3. The scenario uses the Find Agent block to find an agent with the necessary qualifications (e.g., Peter at extension 151).
4. That agent's extension is stored internally in the  $$(destination)$  variable. In this example, the variable is set to *151*.
5. The scenario uses the Connect Call block to distribute the call to the number stored in the  $$(destination)$  variable.

Note that the block properties will be different depending on whether it is used in a voice or a chat scenario.

## Settings

### Title text

*Title text* is the name of the instance of the block. Enter a name in the text field and click the Update button at the bottom of the Edit pane. The new name of the block appears in the flowchart.

### Agent skills required

You can select the *agent skills required* for handling the interaction.

### Wait condition

The agent selection rule is expressed as a sequence of escalation intervals with different agent selection criteria defined for each. The term "escalation" implies that each subsequent interval will normally have less stringent selection criteria, thus increasing the probability of finding an agent available to attend to the waiting interaction.

If there are multiple conditions specified in the escalation interval, ALL conditions must match for an agent to be considered. A set of conditions in each interval is independent from conditions in other intervals.

## add Interval

Any number of escalation intervals can be defined within the expression. The last interval can be finite or infinite (leave the end time empty to use an infinite interval). To specify an interval, first define its length. Then click **add** to define your agent selection condition for this interval, which are as follows.

- **Skill from skill group** – This condition matches the interaction to qualified agents according to skill requirements specified in the preceding [Request Skill or Service](#) blocks. This is the condition that is normally used for skill-based routing. You can define multiple skill groups within the same interval. A minimum acceptable skill level must be assigned to each skill group.
- **Specific skill** – This condition matches the interaction to qualified agents according to an explicitly specified skill. This option can be used instead of the option *Skill from skill group* in simple scenarios without IVR-based service/skill selection. You can define multiple skills within the same interval. A minimum acceptable skill level must be assigned to each skill group.
- **Specific skill from variable** – This condition matches the interaction to the skill in the specified variable. It can be used as a logical extension of the *Specific agent* option. If a specific agent does not become available within the first interval, the interaction can then be routed to a group of agents who share a particular property with that specific agent (e.g., work in the same office). Such a property can be represented by an [auxiliary skill](#). You can obtain this skill and store it in the specified variable using the property **Skill name** of the [Get User Configuration](#) block. This option will ignore any skills requested by the interaction and any agents' skills except the one identified by this variable.
- **Region** – This condition matches a customer's region to a user with the same region. If no region is found for the customer, the interaction will be routed to any user; if no user region is set, the user is matched to any interaction. Note that this condition may be combined with other conditions except with the *Agent currently handling this customer* condition.
- **Specific agent** – This condition matches the interaction to the specified agent (e.g., the agent who handled the previous interaction with the same customer). The variable's value must be the agent's global identifier in the system configuration (see property **User ID** of the [Get User Configuration](#) block). This option is available for the first interval only. If the specified agent is logged out, the next interval will be tried immediately. This option will ignore any of the skills requested by the interaction and any skills possessed by the specified agent.
- **Agent currently handling this customer** – This condition matches the agent currently handling the same customer in another type of interaction. For example, during a phone call with an agent, the customer sends an SMS message; the SMS is delivered to the same agent.

## Overflow call handling starts at

This setting defines at which escalation interval the identified agent will be considered an overflow destination, unless his skills/levels match the skill/level requirements of the preceding escalation intervals.

## HTML code

*HTML code* defines the HTML page that the customer will use during the chat session. This setting applies to chat scenarios only.

## Initial Message

For chat scenarios only (see image below), the *initial message* (i.e., first periodic message) is sent in 5 seconds after the interaction enters the queue, and subsequent periodic messages are sent according to the configured timeout, until the interaction leaves the queue.

## Periodic Message

For chat scenarios only (see image below), the *periodic message* is used to send a periodic regular text message in the same way that the [Send Message](#) block does. For example, the periodic message could include [variables](#) that provide the customer information about EWT or placement in queue.

## Escape button

The *Escape button* is the key on the telephone keypad (0-9, \*, or #) that a caller can press to exit the queue. When the caller presses the escape button, the scenario executes the Escape Digit conditional exit. Typically in such situations, the scenario sends the caller to a voicemail or terminates the call. This setting applies to voice scenarios only.

## Keep call in queue

If selected, the scenario will keep the call in queue even if there are no agents currently logged on. If not selected, the No Agents conditional exit will be used. This setting applies to voice scenarios only and finite intervals only. It does not apply to the condition Specific agent.

## Virtual Queue option

The *Virtual Queue option* allows the callers to request a callback instead of waiting for an agent in the queue. Calls that requested callbacks will be waiting in a virtual queue. The decision to offer the callback option is made based on the call's estimated wait time (EWT) in queue. If a caller selects this option, the Callback exit is taken. This exit would normally lead to a [Request Callback](#) block where the caller's original inbound call will be disconnected while his position in the service queue will be preserved. The callback is made when it is the caller's "turn" to be routed to an agent. Note that the callback option must also be enabled in the [general properties of the corresponding service](#).

To enable the *Virtual Queue option*, select the **enable if EWT is greater than** checkbox and specify the threshold EWT; the Virtual Queue option will be offered only if the Estimated Waiting Time for a given call exceeds this threshold value. Specify the Callback button (i.e., the phone key that the caller will have to press to select the Virtual Queue option) to request a callback instead of waiting in the queue. If the Virtual Queue option is selected, the Callback conditional exit will be executed, allowing the scenario to collect the callback data and place the call in the virtual queue (see block [Request Callback](#)). The Virtual Queue option applies to voice scenarios only. For more information, see the [Virtual Queue Tutorial](#).

## Periodic reminder - repeat every

This setting allows you to specify the number of seconds you want the scenario to wait between playing the Periodic Reminder prompt. Set this field only if you want the scenario to play the Periodic Reminder prompt. Enter 0 if you want to disable this feature. This setting applies to voice scenarios only.

## Other reminders

This setting allows you to configure one-time prompts to play at specific times (i.e., in seconds); note that these prompts do not repeat. This setting applies to voice scenarios only.

## Keep playing hold music while ringing on agent

If selected, the *Music on hold* will continue after the Find Agent blocks exits; the prompt is stopped only when the subsequent [Connect Call](#) block actually connects the caller to the destination (destination answers). Otherwise, the caller will hear the ring-back tone from the moment the call is delivered to the agent and until the agent answers. This option only works if the block actually finds an agent; for all conditional exits, the hold music stops immediately. This setting applies to voice scenarios only.

## Conditional Exits

The Find Agent block may take one of the following conditional exits: No Agents, Queue Limit, Escape Digit, Callback, or Timeout.

### No Agents

The *No Agents* exit is taken if no agents with matching skills are logged in (or when the last such agent logs out before the call is routed.)

### Queue Limit

Your service provider may have set up a limit for the number of items you can have queued for distribution to agents simultaneously (for all services combined). If an interaction processed by the given scenario exceeds this limit upon entering the queue, the *Queue Limit* exit will be used. Note that a repeated attempt to place the interaction in the same queue will result in the termination of the scenario.

### Escape Digit

The caller presses the escape digit to exit the queue. The *Escape Digit* exit will be displayed only if the *Escape button* setting is defined (see below). This exit applies to voice scenarios only.

### Callback

The *Callback* exit will be taken if the *Virtual Queue* option is offered to and is accepted by the caller. This exit applies to voice scenarios only.

### Time Out

The *Time Out* exit will appear only if you define one or more escalation intervals for *Agent skills required*, provided that the last interval is finite. The Time Out exit will be taken if the last interval expires before any agents with matching skills become available. Note that if the last matching agent logs out before the timeout expires, the No Agents exit will be taken.

## Prompts

The Find Agent block can play any of the following prompts for the caller: Music on hold, Initial Prompt, EWT Announcement, Virtual Queue availability announcement, or Periodic reminder.

## Music on hold

The scenario plays the *Music on hold* prompt while the call is in queue. If not defined, the [default Hold and queue music treatment](#) will be played. The *Keep playing hold music while ringing on agent* parameter controls when the music is stopped.

## Initial Prompt

If defined, this optional *Initial Prompt* will be played to the caller as soon as the call is placed in queue (i.e., before the *Music on hold* starts).

## EWT Announcement

The voice scenario plays the *EWT Announcement* when providing the estimated wait time (EWT) to the caller. The scenario uses the system to read the actual EWT, which is received by variable  $$(item.EWT)$ .

For example, the prompt announces *The estimated wait time is*, and then the system announces the EWT, such as *eight minutes*.

## Virtual Queue availability announcement

The *Virtual Queue availability announcement* prompt is played to callers to offer them an option of requesting a callback instead of waiting in the queue. See the description of the *Virtual Queue option* for details.

## Periodic reminder

The scenario will periodically play the *Periodic reminder* prompt to the call in queue at the frequency you set in the *Periodic reminder - repeat every* field. If you do not set this prompt, the reminder does not play. You can use the *EWT Announcement prompt* as a reminder prompt.

## Keep playing hold music while ringing on agent

The scenario plays the *Music on hold* prompt while the call is in queue. If not defined, the [default Hold and queue music treatment](#) will be played. The *Keep playing hold music while ringing on agent* parameter controls when the music is stopped.

## Play random segment

The *Play random segment* option offers variety of queue [audio treatments](#) for voice calls, allowing you to vary the audio treatments played while waiting in the queue.

# Find Agent

In the Scenario Builder application, the Find Agent scenario block finds an agent qualified to handle a given interaction. When the agent becomes available, the block creates a variable called  $$(destination)$  and sets it to the agent's phone number (for voice) or username (for chat). Note that [Omni-Channel Routing](#) settings may determine the frequency with which certain interaction types are routed to your agents.

## Find Agent scenario block

### Important:

The [Connect Call](#) or [Connect Chat](#) block should be used immediately after the Find Agent block to connect the interaction to the identified agent.

For example, the scenario should proceed in the following way:

1. The scenario collects data from a caller.
2. Based on the collected data, the scenario determines the qualifications necessary to handle the call.
3. The scenario uses the Find Agent block to find an agent with the necessary qualifications (e.g., Peter at extension 151).
4. That agent's extension is stored internally in the  $\$(destination)$  variable. In this example, the variable is set to 151.
5. The scenario uses the Connect Call block to distribute the call to the number stored in the  $\$(destination)$  variable.

Note that the block properties will be different depending on whether it is used in a voice or a chat scenario.

## Settings

### Title text

*Title text* is the name of the instance of the block. Enter a name in the text field and click the Update button at the bottom of the Edit pane. The new name of the block appears in the flowchart.

### Agent skills required

You can select the *agent skills required* for handling the interaction.

### Wait condition

The agent selection rule is expressed as a sequence of escalation intervals with different agent selection criteria defined for each. The term "escalation" implies that each subsequent interval will normally have less stringent selection criteria, thus increasing the probability of finding an agent available to attend to the waiting interaction.

If there are multiple conditions specified in the escalation interval, ALL conditions must match for an agent to be considered. A set of conditions in each interval is independent from conditions in other intervals.

### add Interval

Any number of escalation intervals can be defined within the expression. The last interval can be finite or infinite (leave the end time empty to use an infinite interval). To specify an interval, first define its length. Then click **add** to define your agent selection condition for this interval, which are as follows.

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- **Specific skill** – This condition matches the interaction to qualified agents according to an explicitly specified skill. This option can be used instead of the option *Skill from skill group* in simple scenarios without IVR-based service/skill selection. You can define multiple skills within the same interval. A minimum acceptable skill level must be assigned to each skill group.
- **Specific skill from variable** – This condition matches the interaction to the skill in the specified variable. It can be used as a logical extension of the *Specific agent* option. If a specific agent does not become available within the first interval, the interaction can then be routed to a group of agents who share a particular property with that specific agent (e.g., work in the same office). Such a property can be represented by an [auxiliary skill](#). You can obtain this skill and store it in the specified variable using the property **Skill name** of the [Get User Configuration](#) block. This option will ignore any skills requested by the interaction and any agents' skills except the one identified by this variable.
- **Region** – This condition matches a customer's region to a user with the same region. If no region is found for the customer, the interaction will be routed to any user; if no user region is set, the user is matched to any interaction. Note that this condition may be combined with other conditions except with the *Agent currently handling this customer* condition.
- **Specific agent** – This condition matches the interaction to the specified agent (e.g., the agent who handled the previous interaction with the same customer). The variable's value must be the agent's global identifier in the system configuration (see property **User ID** of the [Get User Configuration](#) block). This option is available for the first interval only. If the specified agent is logged out, the next interval will be tried immediately. This option will ignore any of the skills requested by the interaction and any skills possessed by the specified agent.
- **Agent currently handling this customer** – This condition matches the agent currently handling the same customer in another type of interaction. For example, during a phone call with an agent, the customer sends an SMS message; the SMS is delivered to the same agent.

## Overflow call handling starts at

This setting defines at which escalation interval the identified agent will be considered an overflow destination, unless his skills/levels match the skill/level requirements of the preceding escalation intervals.

## HTML code

*HTML code* defines the HTML page that the customer will use during the chat session. This setting applies to chat scenarios only.

## Initial Message

For chat scenarios only (see image below), the *initial message* (i.e., first periodic message) is sent in 5 seconds after the interaction enters the queue, and subsequent periodic messages are sent according to the configured timeout, until the interaction leaves the queue.

## Periodic Message

For chat scenarios only (see image below), the *periodic message* is used to send a periodic regular text message in the same way that the [Send Message](#) block does. For example, the periodic message could include [variables](#) that provide the customer information about EWT or placement in queue.

## Escape button



The *Escape button* is the key on the telephone keypad (0-9, \*, or #) that a caller can press to exit the queue. When the caller presses the escape button, the scenario executes the Escape Digit conditional exit. Typically in such situations, the scenario sends the caller to a voicemail or terminates the call. This setting applies to voice scenarios only.

## Keep call in queue

If selected, the scenario will keep the call in queue even if there are no agents currently logged on. If not selected, the No Agents conditional exit will be used. This setting applies to voice scenarios only and finite intervals only. It does not apply to the condition Specific agent.

## Virtual Queue option

The *Virtual Queue option* allows the callers to request a callback instead of waiting for an agent in the queue. Calls that requested callbacks will be waiting in a virtual queue. The decision to offer the callback option is made based on the call's estimated wait time (EWT) in queue. If a caller selects this option, the Callback exit is taken. This exit would normally lead to a [Request Callback](#) block where the caller's original inbound call will be disconnected while his position in the service queue will be preserved. The callback is made when it is the caller's "turn" to be routed to an agent. Note that the callback option must also be enabled in the [general properties of the corresponding service](#).

To enable the *Virtual Queue option*, select the **enable if EWT is greater than** checkbox and specify the threshold EWT; the Virtual Queue option will be offered only if the Estimated Waiting Time for a given call exceeds this threshold value. Specify the Callback button (i.e., the phone key that the caller will have to press to select the Virtual Queue option) to request a callback instead of waiting in the queue. If the Virtual Queue option is selected, the Callback conditional exit will be executed, allowing the scenario to collect the callback data and place the call in the virtual queue (see block [Request Callback](#)). The Virtual Queue option applies to voice scenarios only. For more information, see the [Virtual Queue Tutorial](#).

## Periodic reminder - repeat every

This setting allows you to specify the number of seconds you want the scenario to wait between playing the Periodic Reminder prompt. Set this field only if you want the scenario to play the Periodic Reminder prompt. Enter 0 if you want to disable this feature. This setting applies to voice scenarios only.

## Other reminders

This setting allows you to configure one-time prompts to play at specific times (i.e., in seconds); note that these prompts do not repeat. This setting applies to voice scenarios only.

## Keep playing hold music while ringing on agent

If selected, the *Music on hold* will continue after the Find Agent blocks exits; the prompt is stopped only when the subsequent [Connect Call](#) block actually connects the caller to the destination (destination answers). Otherwise, the caller will hear the ring-back tone from the moment the call is delivered to the agent and until the agent answers. This option only works if the block actually finds an agent; for all conditional exits, the hold music stops immediately. This setting applies to voice scenarios only.

## Conditional Exits

The Find Agent block may take one of the following conditional exits: No Agents, Queue Limit, Escape Digit, Callback, or Timeout.

## No Agents

The *No Agents* exit is taken if no agents with matching skills are logged in (or when the last such agent logs out before the call is routed.)

## Queue Limit

Your service provider may have set up a limit for the number of items you can have queued for distribution to agents simultaneously (for all services combined). If an interaction processed by the given scenario exceeds this limit upon entering the queue, the *Queue Limit* exit will be used. Note that a repeated attempt to place the interaction in the same queue will result in the termination of the scenario.

## Escape Digit

The caller presses the escape digit to exit the queue. The *Escape Digit* exit will be displayed only if the *Escape button* setting is defined (see below). This exit applies to voice scenarios only.

## Callback

The *Callback* exit will be taken if the *Virtual Queue* option is offered to and is accepted by the caller. This exit applies to voice scenarios only.

## Time Out

The *Time Out* exit will appear only if you define one or more escalation intervals for *Agent skills required*, provided that the last interval is finite. The Time Out exit will be taken if the last interval expires before any agents with matching skills become available. Note that if the last matching agent logs out before the timeout expires, the No Agents exit will be taken.

## Prompts

The Find Agent block can play any of the following prompts for the caller: Music on hold, Initial Prompt, EWT Announcement, Virtual Queue availability announcement, or Periodic reminder.

### Music on hold

The scenario plays the *Music on hold* prompt while the call is in queue. If not defined, the [default Hold and queue music treatment](#) will be played. The *Keep playing hold music while ringing on agent* parameter controls when the music is stopped.

### Initial Prompt

If defined, this optional *Initial Prompt* will be played to the caller as soon as the call is placed in queue (i.e., before the *Music on hold* starts).

### EWT Announcement

The voice scenario plays the *EWT Announcement* when providing the estimated wait time (EWT) to the caller. The scenario uses the system to read the actual EWT, which is received by variable  $\$(item.EWT)$ .

For example, the prompt announces *The estimated wait time is*, and then the system announces the EWT, such as *eight minutes*.

## Virtual Queue availability announcement

The *Virtual Queue availability announcement* prompt is played to callers to offer them an option of requesting a callback instead of waiting in the queue. See the description of the *Virtual Queue option* for details.

## Periodic reminder

The scenario will periodically play the *Periodic reminder* prompt to the call in queue at the frequency you set in the *Periodic reminder - repeat every* field. If you do not set this prompt, the reminder does not play. You can use the *EWT Announcement prompt* as a reminder prompt.

## Keep playing hold music while ringing on agent

The scenario plays the *Music on hold* prompt while the call is in queue. If not defined, the [default Hold and queue music treatment](#) will be played. The *Keep playing hold music while ringing on agent* parameter controls when the music is stopped.

## Play random segment

The *Play random segment* option offers variety of queue [audio treatments](#) for voice calls, allowing you to vary the audio treatments played while waiting in the queue.

# Connect Call



The Connect Call scenario block connects a call to the destination specified in the  $\$(destination)$  variable (typically, the extension of the agent found by the preceding [Find Agent](#) block). If the destination extension has an agent logged in, the system tracks the agent's state according to the state of the call. The block handles call transfers and conferences internally and only ends when the remote party disconnects or the last agent on the call disconnects.

If a [Find Agent](#) block was executed prior to a Connect Call block, then the queue treatment started by that Find Agent block continues until the specified destination answers the call. If a *Service Announcement* prompt (whisper) is specified for a Connect Call block, the ring back tone or music on hold is played to the caller while the service announcement is played to destination party. The caller will not hear the announcement.

For external destinations, Caller IDs are set according to the configuration of the corresponding [dial-out entries](#).

## Settings



Scenario Builder Connect Call scenario block settings

### **Title text**

The name of the instance of the block.

### **Default Destination**

The default phone number to which the call connects if variable  $\$(destination)$  is empty.

Note that if the destination is an IVR, the phone number can include pauses and digits required to get to the desired contact or self-service option. Comma symbols are used for pauses; each comma will delay dialing of the next digit by one second (e.g., 18005552222,,,5,,245). For more information, see the *Agent Guide*, section [How to Speed-Dial Through External IVRs](#).

## Override Destination

The phone number to which the call connects. If this field has a value, the scenario ignores the destination variable. Use this field only if you want to override the destination variable.

Note that if the destination is an IVR, the phone number can include pauses and digits required to get to the desired contact or self-service option. Comma symbols are used for pauses; each comma will delay dialing of the next digit by one second (e.g., 18005552222,,,5,,245). For more information, see the *Agent Guide*, section [How to Speed-Dial Through External IVRs](#).

## Mark all calls connected by this block as overflow calls

If this checkbox is selected, all calls connected via this block will be marked for reporting purposes as calls made to overflow destinations.

## Override calling party name with

This setting enables you to override the configured Caller ID name in the outbound call.

## No Answer Timeout

The number of seconds that the scenario waits for a destination to answer the call before executing the *No Answer* conditional exit. The default is 10 seconds.

## Auto-answer call in

The number of seconds that the scenario waits before the call is auto-answered. If you do not use auto-answer, leave this field empty.

This function will work for agents who use softphones. Support for this function in hardphones depends on a particular hardphone model.

## Escape button for customer to hang up the agent

The button that the caller can press to stop a conversation with this agent. Unlike when it is released, the scenario will continue and can further process the call.

## Custom hold music

The prompt that the scenario plays when the caller is on hold. The prompt is always played from the beginning. The prompt is optional; if present, it will override the [default Hold and queue music treatment](#) set at the contact center level.

## Service announcement

The optional prompt the scenario plays to inform the agent to which service an incoming call pertains or to play a beep as notification.

## number of plays

The number of times that the *Service Announcement* prompt, if used, will be played to the agent.

## stop announcement button

The button that the agent can use to interrupt playback of the service announcement prompt.

## Custom ringback

The prompt that will be played back to the caller instead of a standard ring-back tone. If the *Keep playing hold music while ringing on agent* option is selected in the preceding [Find Agent](#) block, the *Custom ringback* prompt will not be played even if specified. Instead, the queue music will be played up to the moment of answer.

## Repeated answer-side prompt

This prompt is used for transfers of service calls to other call centers to announce the call information when the transferred call is answered by the remote agent (e.g., *This a call is from [name], please press [confirm answer button] to connect*).

When the remote agent presses the confirm answer button, a call with the original calling party is established.

## Confirm answer button

What the agents of remote contact centers will press to pick up service calls forwarded to them from your contact center after hearing the *Repeated answer-side* prompt.

## Drop connection if no answer in

The number of minutes that the scenario will wait for the remote contact center to pick up the call before executing the *No Answer* conditional exit for this call. It starts from the moment that the remote agent answers.

## Conditional Exits

The Connect Call block may take one of the following conditional exits: No Answer, Busy, Target Disconnected, or Transfer Failed.

### No Answer

The destination phone rings but no one answers within the *No Answer Timeout*. This also includes other types of call failures (except for *Busy*).

### Busy

The destination phone is busy (SIP 486) or the call is rejected by an agent.

### Target Disconnected

The call was answered by the target side and eventually normally terminated from target side. The current interaction step is completed and a new interaction step is created. This could be used for surveys when the agent hangs up first and survey flow starts from this conditional exit.

### Transfer Failed

This is a failure branch for failed agent transfers.

