



**Contact Center
Builder**

Setup PLAYBOOK

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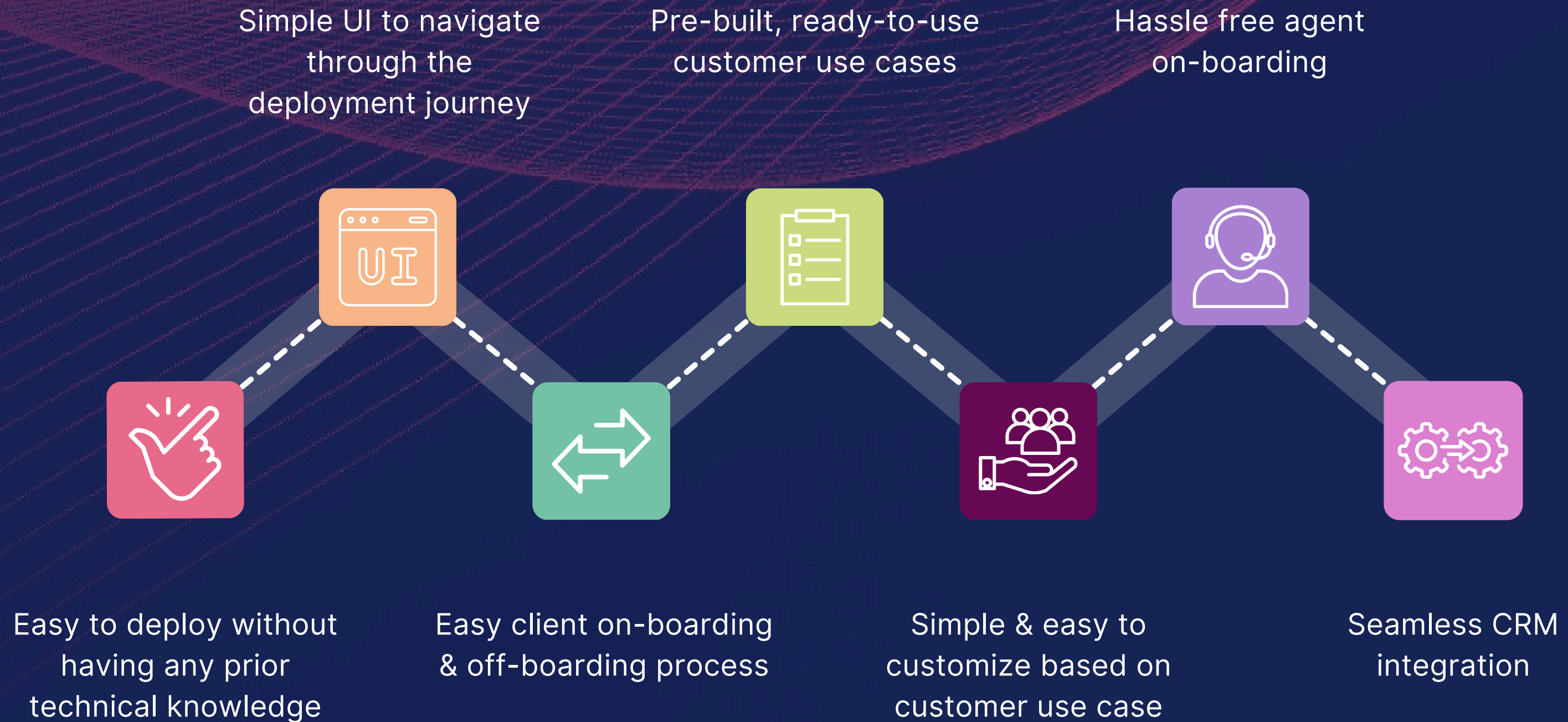
Congratulations

ABOUT US

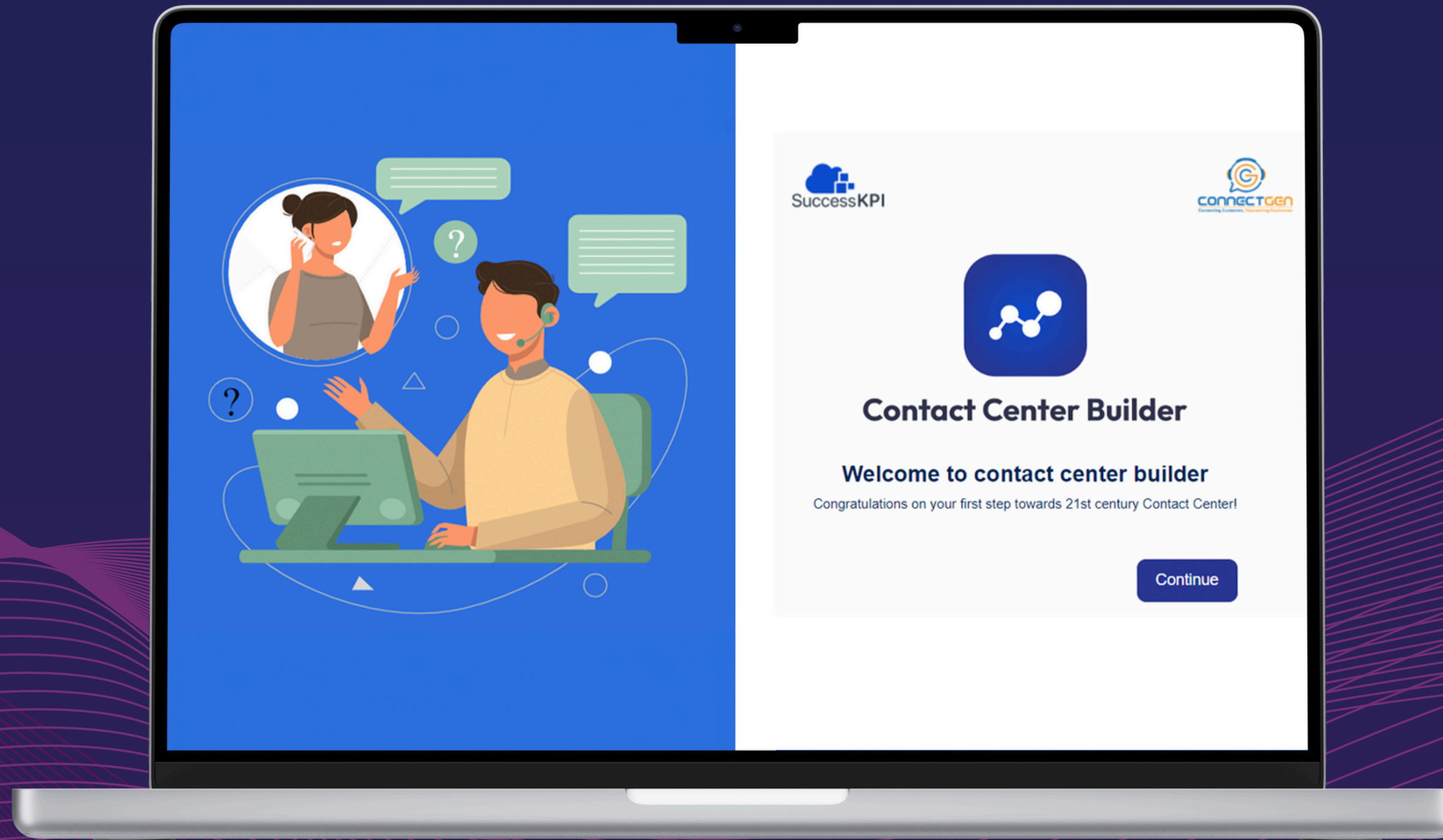
Contact Center Builder revolutionizes the process of establishing contact centers by offering a pioneering solution that enables users to build tailored communication hubs in a fraction of the time typically required. Designed with simplicity and efficiency in mind, Contact Center Builder empowers businesses to swiftly deploy comprehensive contact center solutions without necessitating prior technical expertise.



KEY FEATURES



LAUNCH PAGE



COMPANY DETAILS

01

How will your contact center be used?

Select an option from the pre-built use cases such as Technical Support, Sales Support, and Internal Helpdesk, or select others option to request custom use cases to fit in their specific needs

02

Region

Select a preferred option from the dropdown in which region you want to deploy your contact center.

03

What is your organization name?

Fill in the text box provided with the organization name, and this would help us for managing your contact center if any help needed.

04

Create your access URL

The text box will be auto filled using your organization name, if you wish to change it you can always change by editing in the text box. After entering the text, please click on Check Availability button, to make sure the entered url is available for your contact center.

05

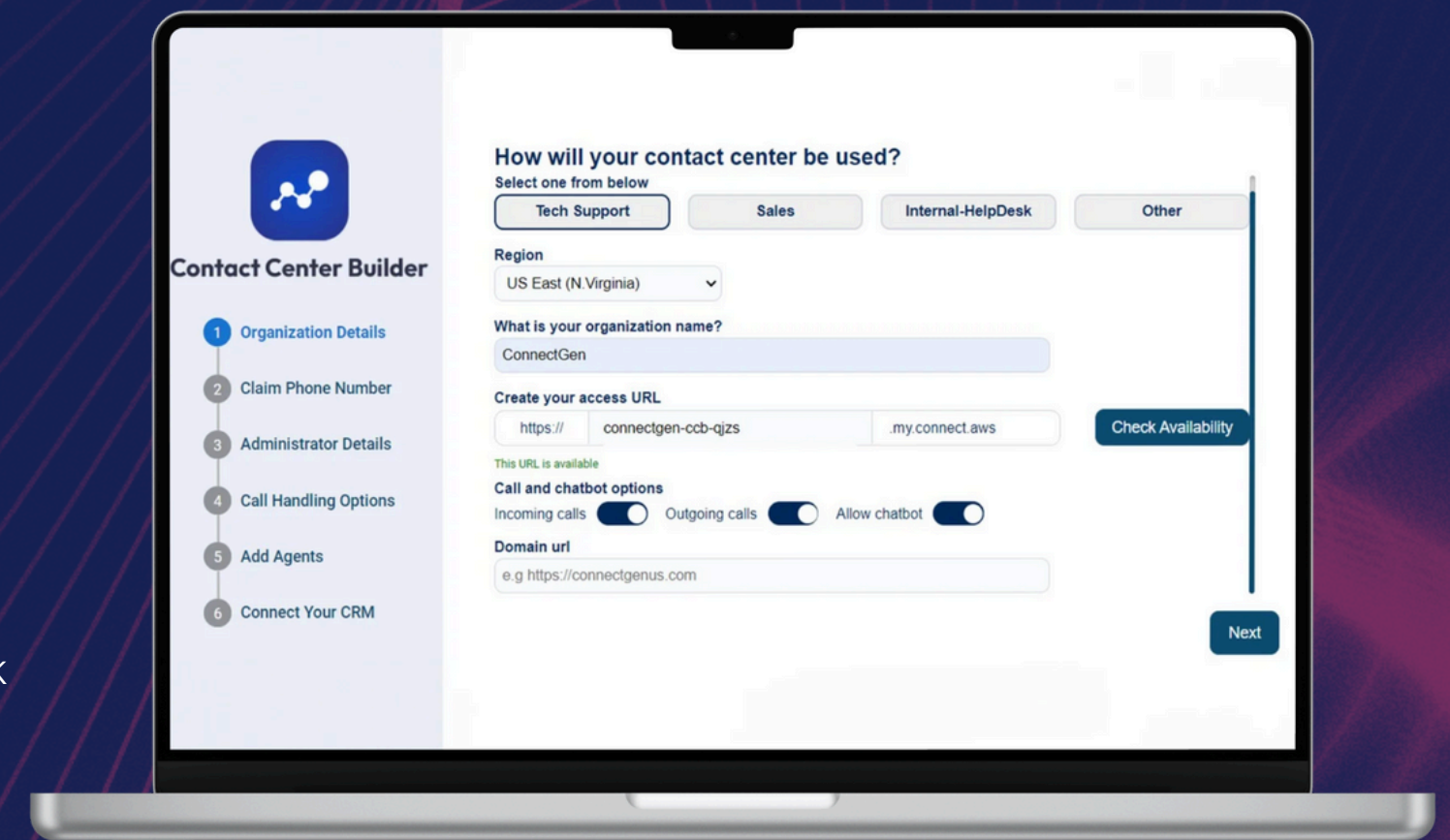
Call and Chatbot options

Turn on/off the toggle buttons provided for Incoming calls, outgoing calls and Chatbot (this will be in placed in your website)

06

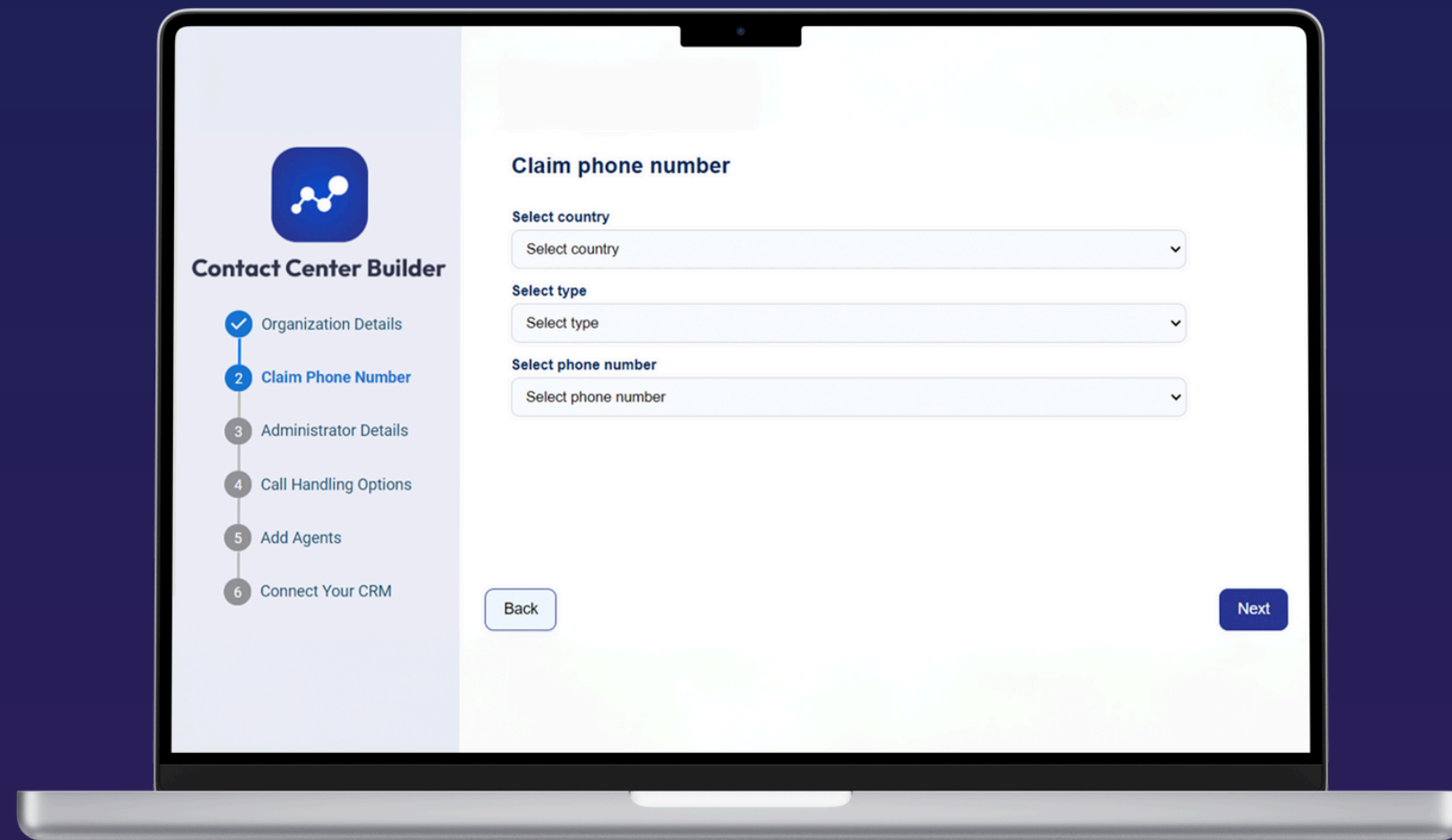
Domain URL

Please provide the URL of the website in which you wanted to include the chatbot.



The screenshot displays the 'Contact Center Builder' web interface. On the left, a sidebar lists six steps: 1. Organization Details (highlighted), 2. Claim Phone Number, 3. Administrator Details, 4. Call Handling Options, 5. Add Agents, and 6. Connect Your CRM. The main content area is titled 'How will your contact center be used?' and includes a 'Select one from below' section with four buttons: 'Tech Support' (selected), 'Sales', 'Internal-HelpDesk', and 'Other'. Below this is a 'Region' dropdown menu set to 'US East (N Virginia)'. A text input field for 'What is your organization name?' contains 'ConnectGen'. The 'Create your access URL' section shows a text box with 'https://connectgen-ccb-qjzs.my.connect.aws' and a 'Check Availability' button. A green message states 'This URL is available'. The 'Call and chatbot options' section has three toggle switches: 'Incoming calls' (off), 'Outgoing calls' (on), and 'Allow chatbot' (on). A 'Domain url' text box contains 'e.g https://connectgenus.com'. A 'Next' button is located at the bottom right.

CLAIM PHONE NUMBER



The screenshot shows a laptop displaying the 'Contact Center Builder' interface. On the left, a sidebar lists six steps: 1. Organization Details (checked), 2. Claim Phone Number (highlighted), 3. Administrator Details, 4. Call Handling Options, 5. Add Agents, and 6. Connect Your CRM. The main content area is titled 'Claim phone number' and contains three dropdown menus: 'Select country', 'Select type', and 'Select phone number'. Each dropdown has a placeholder text 'Select [country/type/number]'. At the bottom of the form are 'Back' and 'Next' buttons.

• Select country

Please select the desired country from the available countries list in the dropdown

• Select type

Please select the desired phone number type (DID/Toll-free) from the dropdown

• Select phone number

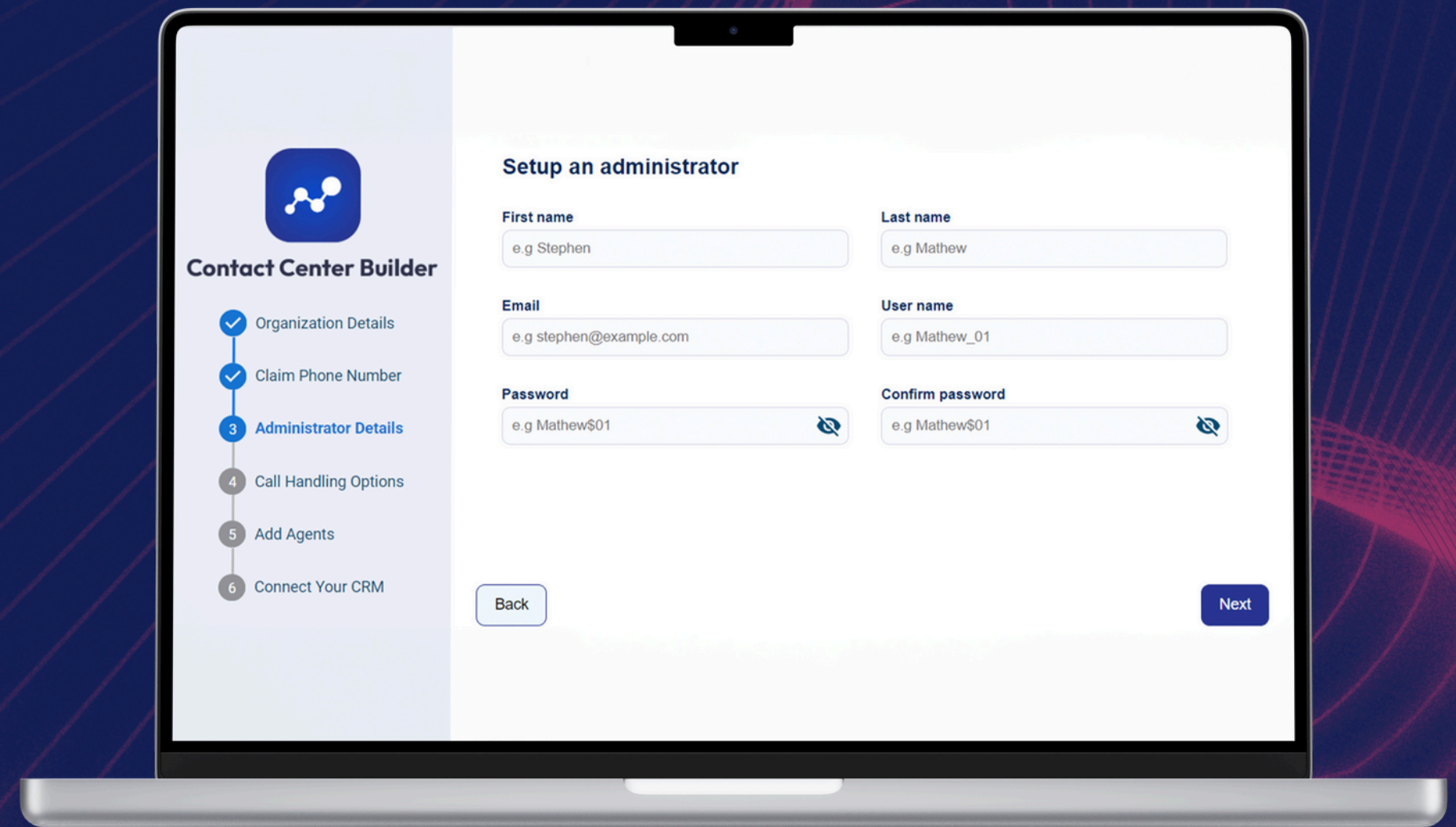
Please select the desired phone number from the list of numbers available in the selected country and type

ADMINISTRATOR DETAILS

Set up an administrator

Please provide the mentioned details to create the Super Admin for the contact Center

First Name
Last Name
Email
User ID
Password
Confirm Password



CALL HANDLING OPTIONS

1. Timezone:

Select an option from the dropdown, in which timezone you want to operate your contact center.

2. Business Hours:

Select an option from the provided tailored business hours or select Custom hours and your desired hours for each day in the week.

3. Welcome greeting message:

Please provide your message of how you wanted to greet your customers when they call your contact center.

4. Call handling – after hours:

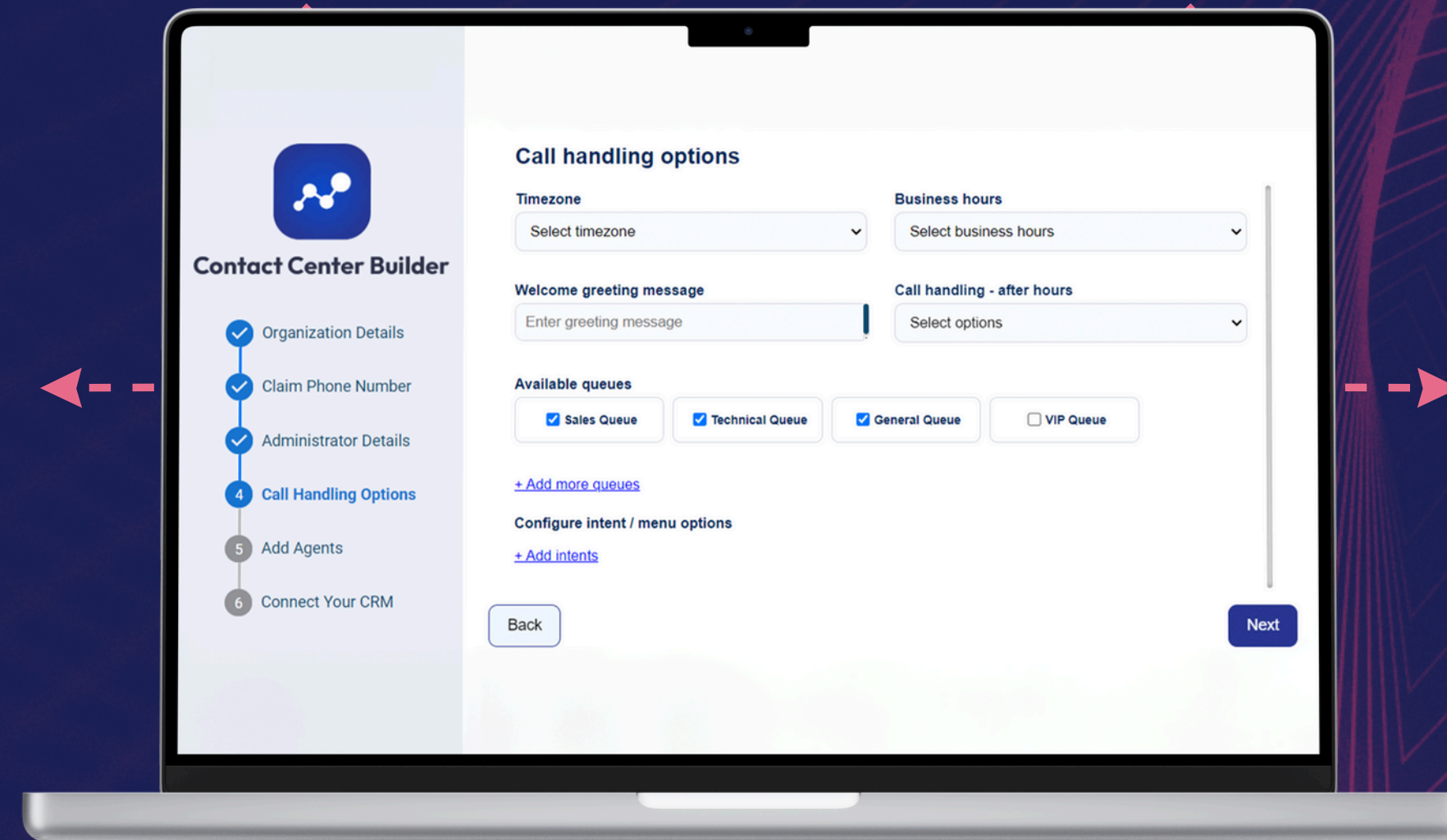
Select the dropdown on how do you want your calls to be handled after business hours, the provided options are VoiceMail and Custom prompt.

5. Available queues:

By default there are 3 queues (Sales, Technical and General queue) attached to your contact center, along with those if you want to add more you can add using “add more queues” button. The queues will be used as DTMF inputs when a customer dials in your contact center.

6. Add Intents/menu options:

You can intents/menu options for your chatbot using this option. Here you need provide the name of the menu options and phrases for that particular menu option.



The screenshot displays the 'Contact Center Builder' interface. On the left, a sidebar shows a progress list with six steps: Organization Details, Claim Phone Number, Administrator Details, Call Handling Options (highlighted), Add Agents, and Connect Your CRM. The main content area is titled 'Call handling options' and contains several sections: 'Timezone' and 'Business hours' dropdown menus; a 'Welcome greeting message' text input field; a 'Call handling - after hours' dropdown menu; 'Available queues' with checkboxes for Sales Queue, Technical Queue, General Queue, and VIP Queue; and 'Configure intent / menu options' with an '+ Add intents' link. 'Back' and 'Next' buttons are located at the bottom of the form.

ADD AGENTS

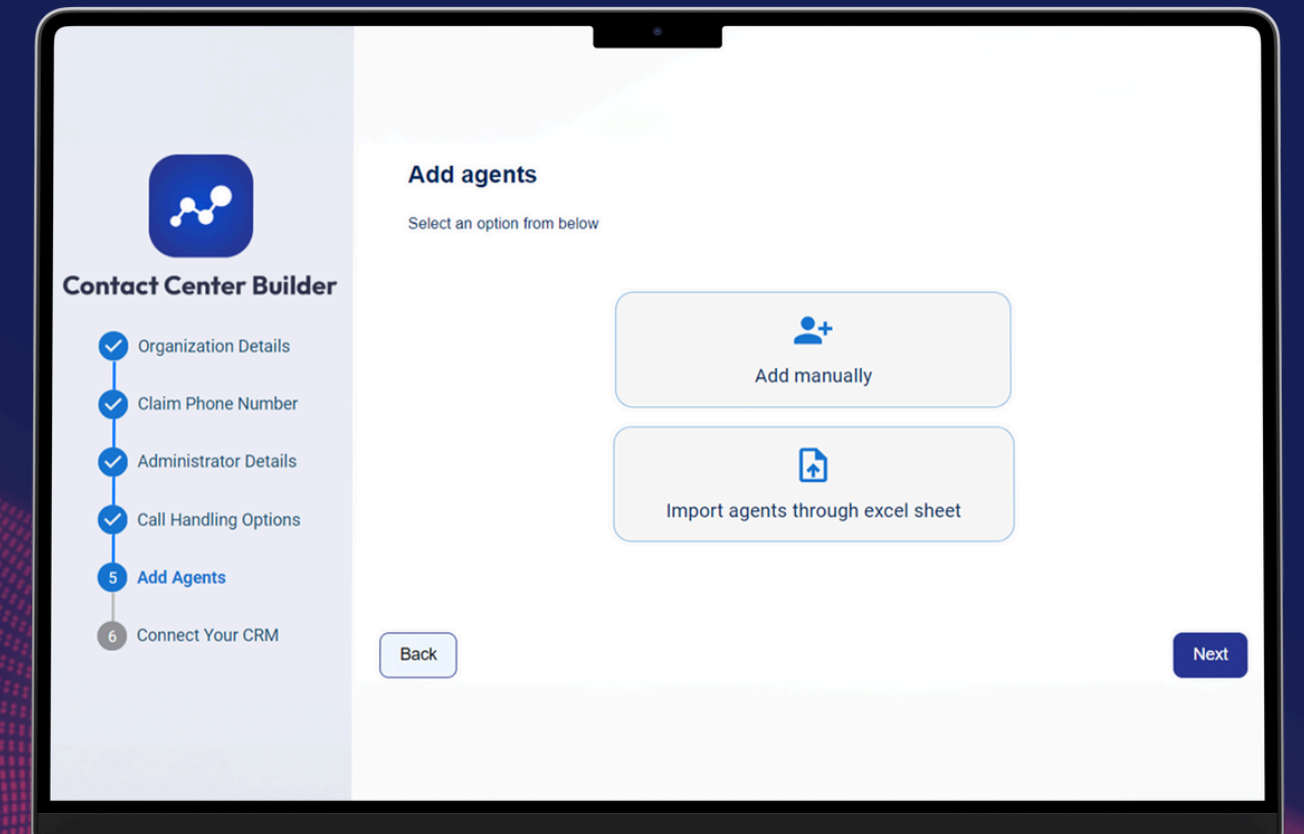
Select one option from below:

Add manually

By clicking on Add Manually, you will be able to see a popup, in which it will ask you to provide the details of the agent which includes (First Name, Last Name, Email, UserID, Password, Phone Number, User Role and Routing Profile). Either you can add in this way, or you can go with the second option.

If you are using this option, follow the steps provided. Download the template and all the details as per the template and upload it to the Contact Center Builder screen using the upload button. Note: By using this option, you can add all your agents in single shot.

Import agents through excel sheet

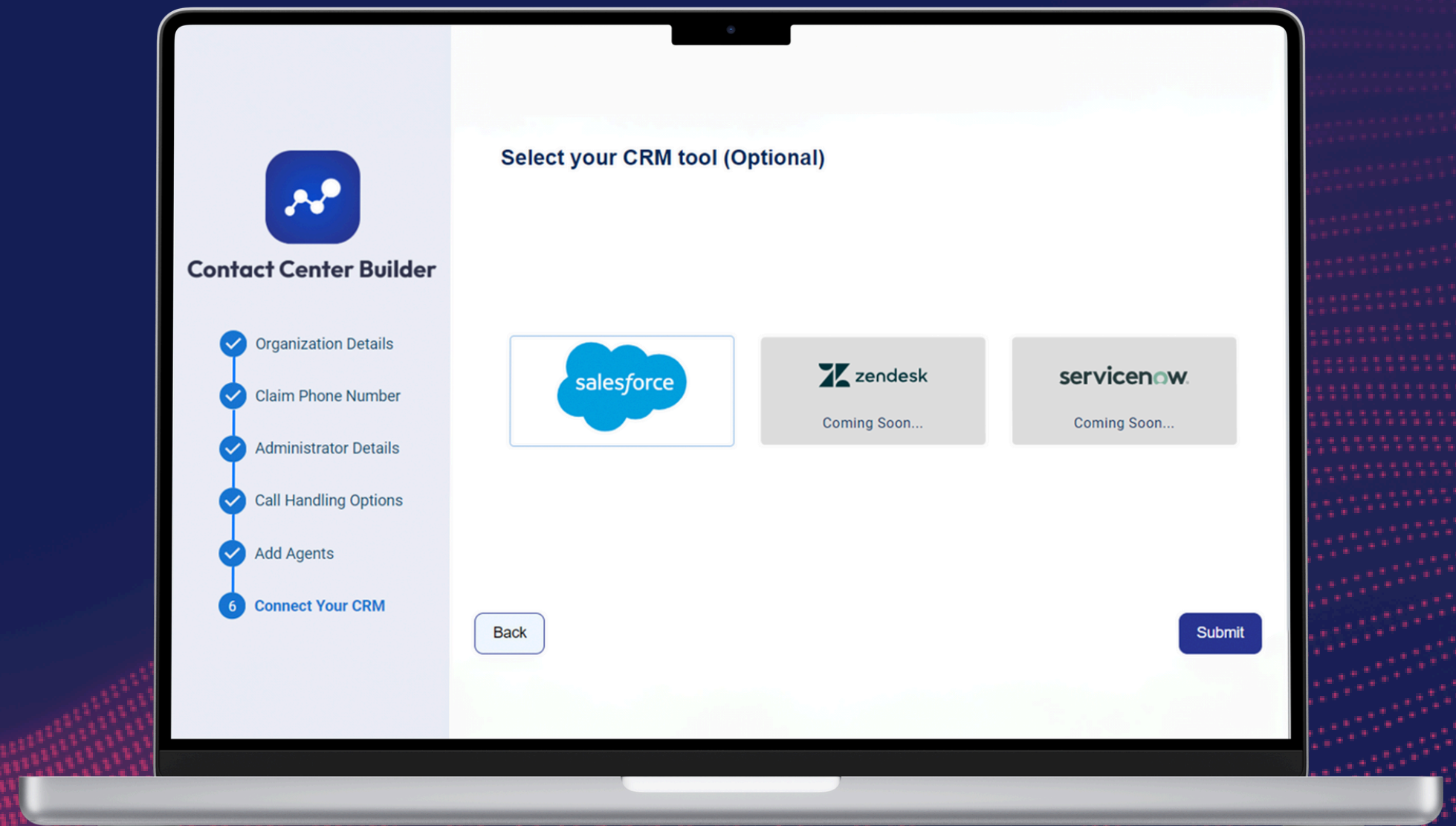


SELECT YOUR CRM TOOL (OPTIONAL)

Select one from the options below

If you have any existing CRM tool from the below options, please click on that image and proceed for further details.

If you don't have any CRM, without selecting any option directly hit **submit** button.



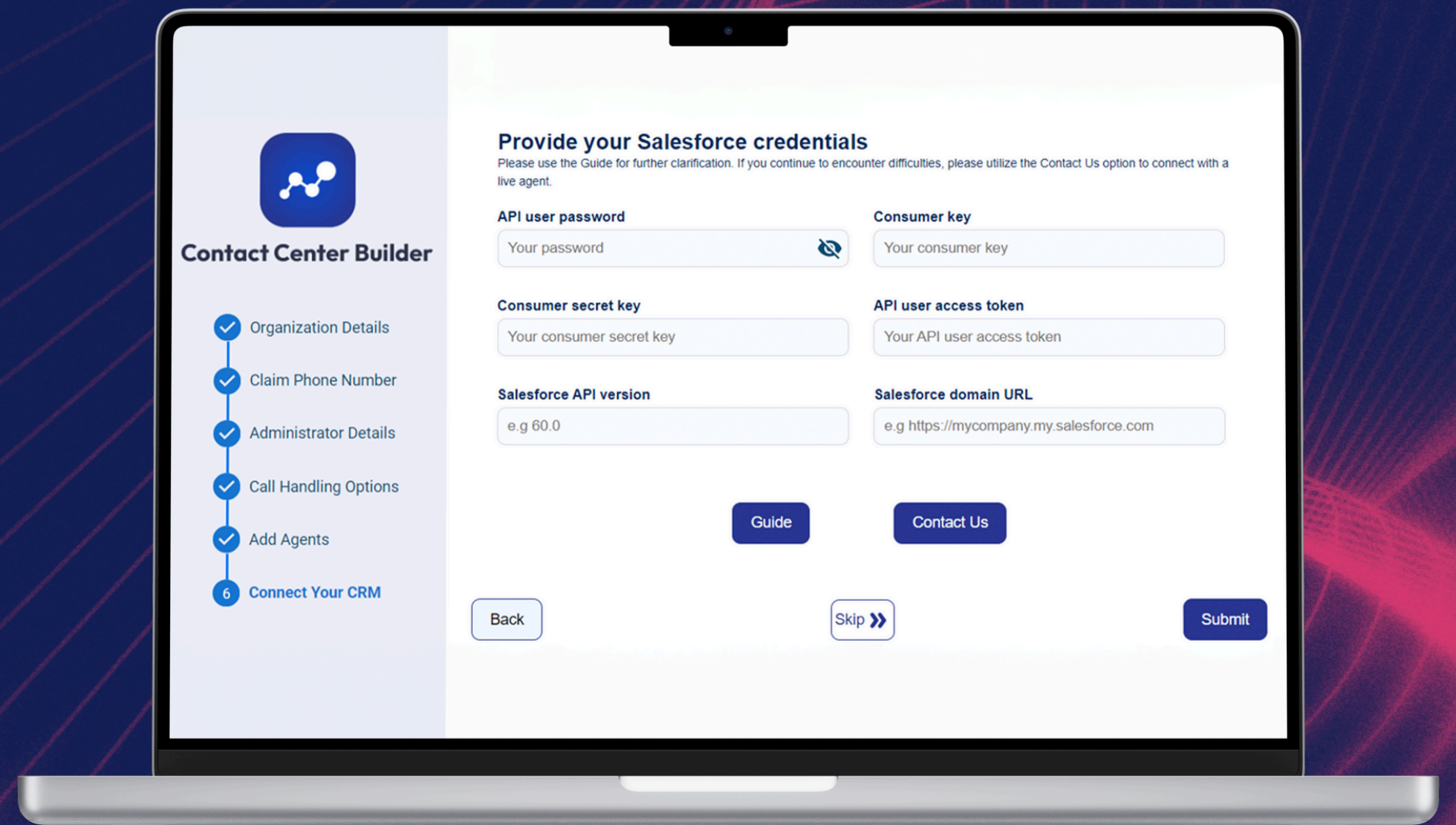
PROVIDE YOUR CREDENTIALS

1. Enter your details

On this screen, you will be asked for few details to connect your CRM with your contact center, if you are not sure on how to get those details, please download the **guide** provided and enter the details. If you are still facing the issues, hit **Contact Us** button, one of our live agent will be joining over the video and will be happy to assist you.

2. Skip

If you wish not to connect your CRM tool, you and hit **skip** button and continue to the next screen.



The screenshot displays the 'Contact Center Builder' interface. On the left, a vertical navigation menu shows a progress list with six items: 'Organization Details', 'Claim Phone Number', 'Administrator Details', 'Call Handling Options', 'Add Agents', and '6 Connect Your CRM'. The main content area is titled 'Provide your Salesforce credentials' and includes a sub-header: 'Please use the Guide for further clarification. If you continue to encounter difficulties, please utilize the Contact Us option to connect with a live agent.' Below this, there are six input fields arranged in two columns: 'API user password' (with a password icon), 'Consumer key', 'Consumer secret key', 'API user access token', 'Salesforce API version' (with the example 'e.g 60.0'), and 'Salesforce domain URL' (with the example 'e.g https://mycompany.my.salesforce.com'). At the bottom of the form, there are four buttons: 'Back', 'Guide', 'Contact Us', and 'Submit'. A 'Skip >>' button is also present at the bottom right.

CONGRATULATIONS



1. Phone Number

On this screen, you will be able to see the phone number you selected in the earlier and is assigned for your contact center. Now you can use this number for your operations.



2. Access-URL, Username & Password

The details displaying are your administrator credentials, you can login to your Contact Center console and manage all the operations. You will be receiving all this details to the provided email in the administrator screen.



3. Support

If you need any help/support, please reach out to our 24*7 support center at support-ccb@connectgenus.com & +1 (866)-983-0491



The background features a dark blue field with intricate, flowing patterns of thin red lines. These lines form large, overlapping, wave-like shapes that create a sense of movement and depth. The overall aesthetic is modern and artistic.

THANK YOU!