



Contact Routing

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About Contact Routing

Each contact arrives at an entry point, where a routing strategy applies business logic. Based on the evaluated criteria in the routing strategy, the system selects an appropriate queue to distribute the contact to one of the available teams.

About Skills-based Routing

Skills-based Routing (SBR) is an optional feature that matches the needs of contacts with agents who have the skills to best meet those needs. SBR is available for voice contacts as well as digital channel contacts. When calls arrive at an entry point, SBR classifies the calls into subsets. You can route the calls in each subset to agents who possess a required set of skills, such as language fluency or product expertise.

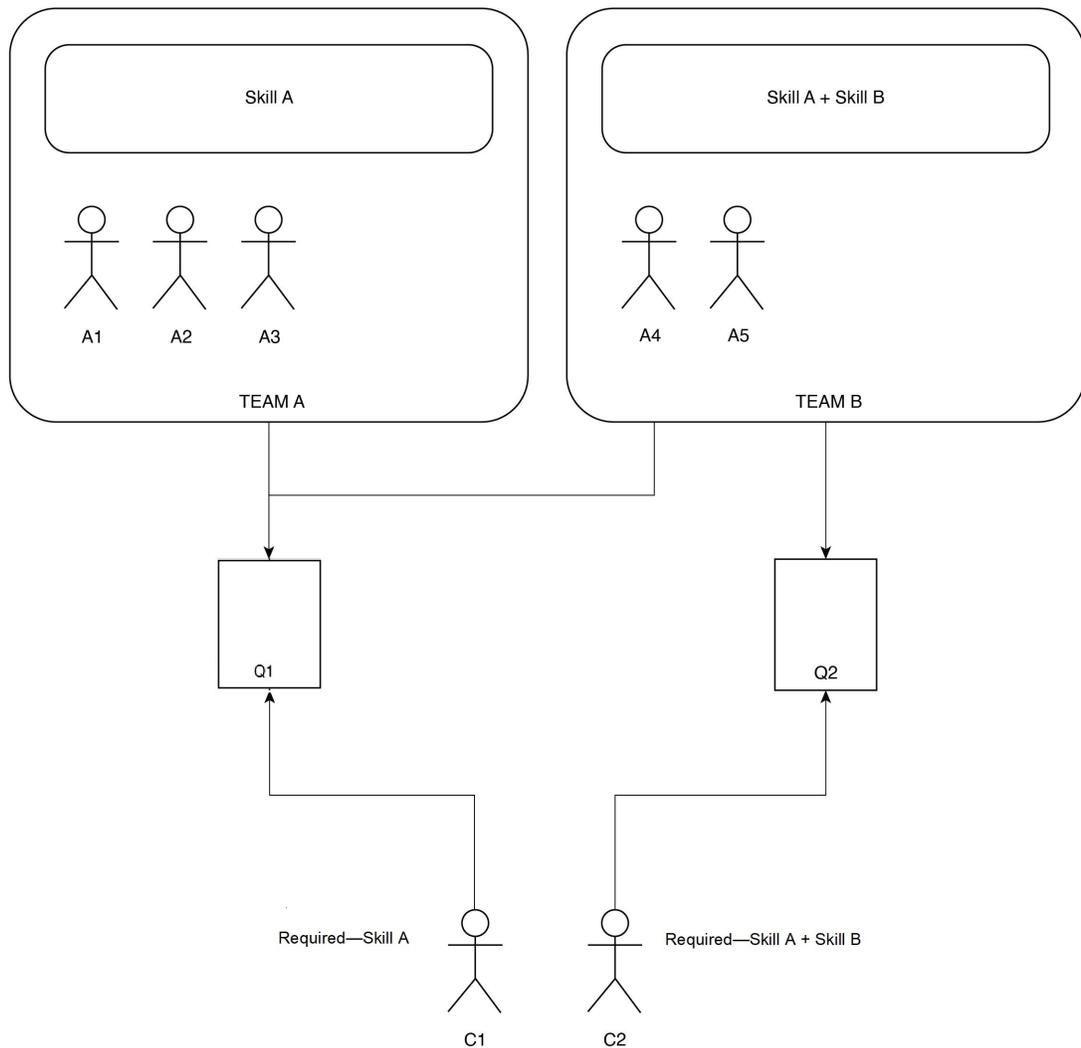
SBR assigns skill requirements to calls in a flow. Based on the assigned skill requirements, the calls enter a queue for distribution to agents who have matching skills. You can configure SBR in a way that removes or reduces the skill requirements of agents if an agent is not available within a time interval that is specified in the queue. For more information, see [Skill Definitions](#). To remove or reduce the skill requirements, specify the skill relaxations in the [Queue Contact](#) activity.

SBR matches all skill requirements of contacts with the skills of agents. If one of the skill requirements of a contact is invalid because skill values are not properly defined in the flow, SBR cannot find a matching agent. In such cases, the call is routed to the longest available agent.

SBR provides the following capabilities:

- Match skill requirements of contacts with agents who have those specific skills.
- Add skill requirements to contacts and route contacts with the same skill requirements to a single queue. For more information, see [Queue Contact](#) activity.
- Configure different agent teams with a set of agents to serve a queue. For more information, see [Create a Queue and an Outdial Queue](#).

- Map various skills to the profiles of these agents. For more information, see [Agent Profiles](#).



In the preceding example, contact C1 requires skill A and contact C2 requires both skill A and skill B. When C2 enters the queue, it requires agents with both skill A and skill B. For best customer service, map C2 to the team that has both skill A and skill B. Do not map C2 to a team that has only skill A or skill B. If you map C2 to a team that has only skill A or skill B, C2 becomes the longest contact in the parked state.

Skills-based Routing Types

SBR routes contacts to agents based on the contact's skill requirements that are configured in the flow. For more information, see [About Skills-based Routing](#).

You can enable SBR in the Queue Routing Type settings when creating a queue. For more information, see [Create a Queue and an Outdial Queue](#). SBR routes contacts to agents in one of the following ways when more than one agent with the required skill set is available:

- Longest Available Agent

- Best Available Agent

Longest Available Agent: SBR routes contacts to the agent who has been available for the longest duration.

Best Available Agent: SBR routes contacts to the agent who has the highest level of proficiency in the skill. To route contacts to the best available agent:

- Configure the contact's skill requirements with the necessary condition so that the contact is always routed to an agent with the highest level of proficiency:
 - If you choose \leq condition for the contact's skill requirements, a lower value indicates a better match with the contact's requirement.
 - If you choose \geq condition for the contact's skill requirements, a higher value indicates a better match with the contact's requirement.
 - If you choose *IS* condition for the contact's skill requirements, a higher value indicates a better match with the contact's requirement.

For more information, see Skill Requirements in [Queue Contact](#) activity.

- Assign the proficiency level to an agent when creating [Skill Definitions](#) and [Agent Profiles](#).

For example, you can route contacts to agents with English speaking skill as a language proficiency. Consider two agents: Agent 1 with an English language proficiency level of 3 and Agent 2 with an English language proficiency level of 6. Both agents are available in the queue.

- If you configure the contact's skill requirement with \leq condition in the flow, Agent 1 with an English language proficiency level of 3 is the best available agent in the queue to connect to the contact.
- If you configure the contact's skill requirement with \geq condition in the flow, Agent 2 with an English language proficiency level of 6 is the best available agent in the queue to connect to the contact.

Advanced Queue Information

The Advanced Queue Information feature allows you to assess if the skills of the logged in and available agents in a queue match the contact's skill requirement without queueing the contacts for a long duration. The `GetQueueInfo` activity provides the number of agents that are logged on and available. However, this activity doesn't provide information about any logged in agents who have specific skills that match the requirement of a specific contact. For more information about the `GetQueueInfo` activity, see [Get Queue Info](#).

At some time of the day, there may be no agents who are adequately skilled to match the skill requirement of a specific contact. The administrator needs information about such agents before and after queuing a contact to initiate alternative action such as playing a message, providing a callback option, or escalating to a different queue.

The administrator can do the following:

- If this activity is invoked before queuing the contact, the flow uses the skill requirements that are configured in the Advanced Queue Information activity and the teams from the last call distribution group. This determines the number of logged in and available agents and populates the `LoggedOnAgentsAll` and `AvailableAgentsAll` output variables. The system sets the output variable `CurrentGroup` to `-1`.



Note A value of **-1** for the **CurrentGroup** indicates that the contact isn't yet queued when the activity is invoked. Flow designers can use the output variable **CurrentGroup** and determine if the contact isn't queued.

- If this activity is invoked after queuing the contact, the system considers the current skills of the contact. The skills in the current skill relaxation cycle and the teams from the current call distribution group will be used to calculate the available and logged in agents. These values are populated in the **LoggedOnAgentsCurrent** and **AvailableAgentsCurrent** output variables. The system uses skills from the current skill relaxation cycle and the last call distribution group to calculate logged in and available agents and stores these values in the **LoggedOnAgentsAll** and **AvailableAgentsAll** output variables. The system also stores values in the **PIQ, CurrentGroup, and TotalGroups** output variables.



Note You can invoke this activity for LAA-based queues. However, skill requirements that are configured for this activity aren't applicable for LAA-based queues. You can use this activity in a loop. The Flow Designer invokes the Advanced Queue Information activity when executing the flow.

In the Flow Designer, you can create flows using the Advanced Queue Information activity only if the feature flag is enabled for this feature. You can't work with flows that have the Advanced Queue Information activity in the Flow Designer, if the feature flag is disabled. Ensure that the feature flag is enabled for the Advanced Queue Information activity.



Note As part of the Advanced Queue Information when a contact is parked in a queue and you use the Advanced Queue Information to query another queue stack, this will not be supported and will result in an error. For more information on the error response code, see [Advanced Queue Information](#).

Escalate Call Distribution Group

The application uses the **Escalate Call Distribution Group** activity in the post queuing loop to quickly move to the next call distribution group or the last. Typically, administrators use this activity to identify the contacts that are parked against escalation groups. These escalation groups have at least one logged in agent who has matching skills or no logged in agents.

The application uses the QueueContact activity and calls the advanced GetQueueInfo activity to determine if there are any agents logged in to a specific call distribution group. If no agents are logged in to a specific call distribution group, the flow designer uses the EscalateCallDistribution activity to move ahead to either the next or the last call distribution group in the series. If an agent is available in the escalated group, Webex Contact Center routes the contact to that agent. If not, Webex Contact Center parks the contact immediately in that call distribution group.

For more information about the QueueContact activity, see [Queue Contact](#).

A customer use case is a queue that has many call distribution groups. If an agent is not available in the first call distribution group to answer a call, the flow designer redirects the call to another call distribution group within the queue. At each level, the number of agents in the call distribution group increases so that there is

a greater chance of the call getting answered. At certain times of the day, agents from this group or other groups might not be available.

For SBR and LAA-based queues, if you invoke the `EscalateCallDistribution` activity on a contact that is not yet queued, it results in an error and exits the error path in the flow activity.



Note **Escalate Call Distribution Group** is an independent activity. You can use this activity along with the `AdvancedQueueInformation` and the `GetQueueInformation` activities to escalate the call distribution group on a queue. The **CheckAgentAvailability** parameter in the `QueueContact` activity results in escalation of call distribution groups. Don't use the `EscalateCallDistributionGroup` activity along with the **CheckAgentAvailability** parameter in the `QueueContact` activity.

In the Flow Designer, you can create flows using the `EscalateCallDistributionGroup` activity only if the feature flag is enabled for this feature. You can't work with flows that have the `EscalateCallDistributionGroup` activity in the Flow Designer, if the feature flag is disabled. Ensure that the feature flag is enabled for the `EscalateCallDistributionGroup` activity.

Routing of Parked Contacts

SBR parks contacts in a queue until an agent connects with the contacts.

When agents become available, SBR routes contacts by using one of the following selection methods:

- Skills-based Contact Selection
- *First In, First Out* (FIFO) based Contact Selection



Note By default, Skills-based contact selection is enabled for your organization.

Skills-based Contact Selection

In skills-based contact selection, contacts are selected based on the exact match between the skill requirements of the contact and the skills of the agent. Skills-based contact selection does not assign contacts to agents on FIFO basis. If the contact's skill requirements match exactly with the agent's skill, the contact connects to the agent irrespective of its position in the queue. If there are many such contacts with the same skill requirements, skills-based contact selection filters contacts in the queue and assigns them to the agent in the following order:

1. Priority
2. Timestamp (oldest to newest)

For example, consider that contact C1 which requires an agent with skill A and contact C2 which requires an agent with skill B are waiting in the queue to connect to an agent. Contact C3 which requires an agent with skill C also enters the queue. If an agent with skill C becomes available, C3 does not wait for C1 and C2 to connect to agents, as the skill requirements of C3 match exactly with the agent who has skill C.

First In, First Out (FIFO) based Contact Selection

The first contact that enters the queue has the highest priority to connect to an agent. The first contact connects to an agent when an agent with matching skills becomes available. If the agent's skill does not match the skill requirement of the first contact that is parked in the queue, the agent does not connect to the first contact. Even though the agent's skill matches the skill requirements of other contacts in the queue, the contacts remain parked until the first contact finds an agent.

For example, consider two contacts: C1 is the first contact to enter the queue which requires an agent with skill A and C2 is the second contact to enter the queue which requires an agent with skill B. When an agent with skill B becomes available, C2 does not connect to skill B. Since C1 is the first contact to enter the queue, SBR waits for an agent with skill A to be available to connect to C1 first. C2 connects to skill B only after C1 finds an agent.



Note To enable FIFO-based contact selection for your organization, contact Cisco Support.

Set Up Skills-Based Routing

Procedure

-
- Step 1** Define the skills. For more information, see [Skill Definitions](#).
 - Step 2** Define the skill profiles. For more information, see [Skill Profiles](#).
 - Step 3** Assign the skill profiles to agents. You can assign a skill profile to an individual agent. Currently, you cannot assign a skill profile to a team. For more information, see [View the Details of a User](#).
 - Step 4** Create a queue with a channel type as Telephony and Queue Routing Type as Skills-Based.
 - Step 5** Create a flow that defines how to treat the call. For more information, see [Create and Manage Flows](#).
 - Step 6** Add a Queue Contact activity and select the queue for which Skills-Based Routing is configured. For more information, see [Queue Contact](#).
 - Step 7** Create an entry point routing strategy and select the flow that you created. For more information, see [Create a routing strategy, on page 16](#).
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Agent-based Routing

Agent-based Routing is an optional feature that routes or queues a contact to the preferred agent directly. An agent lookup with agent's email address or agent's ID routes a contact to the preferred agent. The Queue To Agent activity in the flow helps to achieve Agent-based Routing. For more information, see the section [Queue To Agent](#) activity.

A contact can have one or more preferred agents. The mapping between the contacts and their preferred agents is managed in an external application outside Webex Contact Center. The preferred agent lookup for any contact is performed using the HTTP Request activity in the flow. The HTTP Request activity retrieves the mapping from the external application. To route or park the contact against that preferred agent, you can configure the Queue To Agent activity in the flow. The Queue To Agent activity allows you to specify the

agent by their Webex Contact Center agent ID or email address. You can also park the contact against a preferred agent if that preferred agent isn't immediately available.

You can consider chaining an activity within the flow to route or queue contacts.

For example, you can chain one Queue To Agent activity to another Queue To Agent activity to queue a contact to multiple preferred agents. You can chain a [Queue Contact](#) activity to the Queue To Agent activity to route a contact if none of the preferred agents are available for that contact.

Agent-based Routing is useful in the following scenarios:

- **Preferred agent routing:** The customer can assign contacts to dedicated agents or relationship executives. In such scenarios, the Agent-based Routing routes the contacts directly to that preferred agent.
- **Last agent routing:** When a contact calls back the contact center multiple times to interact with an agent, Agent-based Routing can route the contact to the last agent who handled that contact.

In both use cases, the details of the contact and the agent mapping are stored outside the Webex Contact Center. The HTTP activity retrieves the data. The Queue To Agent activity routes the contact to the preferred agent or the last agent.

To set up Agent-based Routing:

Before you begin:

You must export the Webex Contact Center agent ID and agent email address from Webex Contact Center to an external application. Webex Contact Center doesn't store the mapping between the agent and its contacts.

1. Retrieve the mapping between the agent and the contact from the external application using the HTTP Request activity in the Flow Designer (From the Management Portal navigation bar, choose **Routing Strategy** > **Flow** and click **New** to create a new flow). For more information, see the section [HTTP Request](#).
2. Configure the Queue To Agent Activity in the Flow Designer. You can provide the general settings and the contact handling details to route the contact. For more information, see the section [Queue To Agent](#) activity.

Configure Multimedia Profiles

If your enterprise uses social channels, chat, and email routing in addition to voice, then Multimedia profiles are enabled. You can associate sites and agents with multimedia profiles.

Procedure

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- | | |
|---------------|--|
| Step 1 | Define the multimedia profiles. If your enterprise subscribes to the Multimedia feature, each agent is associated with a multimedia profile, which specifies how many contacts of each media type the agent can handle concurrently. For more information, see Multimedia Profiles . |
| Step 2 | Assign multimedia profiles to sites, teams, or agents. When Multimedia is enabled, every site is associated with a multimedia profile. Each agent-based team at a given site is associated with the profile assigned to that site unless the team is assigned a different multimedia profile. Similarly, each agent logged in to a team is associated with the team's profile unless the agent is assigned a different multimedia profile. For more information, see Sites , Create a team , and Users . |

- Step 3** Create separate entry points and queues for each media type. For more information, see [Create an Entry Point](#).
- Step 4** Work with Webex Contact Center Operations to create routing strategies configured to use a specialized call control script.
- Step 5** Work with your specific CRM vendor to configure the multimedia interaction at the agent level.
- Alternately you can configure the queue routing strategy to assign multimedia contacts (Chat, Email, Social Channels) to your agents.
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Working with Resource Files

To view the resources, choose **Routing Strategy** from the Management Portal navigation bar.

You can choose to see the audio files, predefined emails, or predefined chat responses.

Upload an Audio Resource File

Webex Contact Center supports uploading .wav audio files with the following specifications:

- Channels: 1
- Sample Rate: 8000
- Sample Encoding: 8-bit u-law

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
- Step 2** From the **Routing Strategy** page, choose **Resources > Audio Files**.
- Step 3** Click **New**.
- Step 4** On the **Upload Resource** page, click **Browse**.
- Step 5** Navigate to the file in your system, and click **Open**.

The **File** field displays the path and file name of the uploaded file, and the **Resource Name** field displays the file name.

- Step 6** Click **Save**.
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Edit an Audio Resource File



Note Do not update resources that are currently used by the system.

Procedure

Step 1 From the Management Portal navigation bar, choose **Routing Strategy**.

Step 2 From the **Routing Strategy** page, choose **Resources > Audio Files**.

Step 3 Click the **Ellipsis** button beside the resource name and click **Edit**.

Step 4 On the **Overwrite Resource** page, click **Browse**.

Step 5 Navigate to the file in your system, and click **Open**.

The **File** field displays the path and file name of the uploaded file, and the **Resource Name** field displays the file name.

For audio file specifications, see [Upload an Audio Resource File, on page 8](#).

Step 6 Click **Save**.

Step 7 Click **Yes** to confirm overwriting the audio file.

Play or Download a .wav File

Procedure

Step 1 From the Management Portal navigation bar, choose **Routing Strategy**.

Step 2 From the **Routing Strategy** page, choose **Resources > Audio Files**.

Step 3 Click the ellipsis button beside the file name and click **Play**.

Step 4 In the dialog box that opens, specify whether you want to open or save the file. When you click **Open**, the media player installed on your computer opens and plays the file. If a compatible media player is not installed, a dialog box opens and prompts you to download a player.

Update a Resource File

Procedure

Step 1 From the Management Portal navigation bar, choose **Routing Strategy**.

Step 2 From the **Routing Strategy** page, choose **Resources > Audio Files**.

Step 3 Click the ellipsis button beside the file name and click **Edit**.

Step 4 Make the necessary changes to the resource.

Step 5 Click **Save**.

Copy a Resource File

The copy function enables you to create backup copies of prompts and other resource files. Only files with the *.wav* extension can be copied.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
 - Step 2** From the **Routing Strategy** page, choose **Resources > Audio Files**.
 - Step 3** Click the ellipsis button beside the file name and click **Copy**.
 - Step 4** On the page that appears, enter a name for the copied file or leave the default name (Copy_ is prepended to the original name).
 - Step 5** Click **Save**.
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Export References to a Media File

You can view or export a list showing the name of each routing strategy that references a specified media file along with the name of the associated entry point or queue. In the case of a global routing strategy, the list shows 0 instead of the name of an entry point or queue.

To view or export the references to a media file:

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
 - Step 2** From the **Routing Strategy** page, choose **Resources > Audio Files**.
 - Step 3** Click the ellipsis button beside the file name and click **Excel** or **CSV**.
 - Step 4** In the dialog box that opens, specify whether to open or save the file.
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Create a Predefined Email Template

You can predefine the email template that agents use to communicate with customers. An organization can have a single predefined template for email.

To edit or delete the template, click the ellipsis button beside the template in the **Predefined Emails** page.



Note You cannot use the predefined email templates for quick-reply emails.

To create an email template:

Procedure

Step 1 From the Management Portal navigation bar, choose **Routing Strategy**.

Step 2 From the **Routing Strategy** page, choose **Resources > Predefined Emails**.

Step 3 Click **New**.

Note The **New** button is disabled if your organization already has a predefined email template.

Step 4 In the **New Predefined Email** dialog box, do the following:

- a) Enter a name for the email template.
- b) Set the status for the template.

Set the status as **Active** to use it as a default template for all email communications between agents and customers.

Set the status to **Not Active** to save it as draft. You can later change the status to **Active** to use it.

- c) Enter the email body. You can use the formatting tools to draft the email body.
- d) (Optional) Add macros to the email body.

You can use the macro to add variables for **Customer Name** or **Agent Name** to the email. You can set a default value for the variable type you choose. You can use the macros multiple times in the template as per your requirement.

- To add the macro variables, place the cursor where you want the variable. Choose the type of macro you want to add and click the **Insert to Text Editor** button.
- To set a default value for a macro, enter the default value in the field **Default Value** before you insert the macro to the text editor.

- e) Click **Save** to save the email template.
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Create a Predefined Chat Response

You can define a set of chat responses that your agents can use to communicate with the customers. You can configure the chat responses for a specific queue or for all the queues. We support the following languages:

- US English
- Japanese
- Italian
- French
- German
- Spanish

You can configure 50 responses per language, per queue, for a total of 300 responses per queue. Agents can see the responses in their queue based on the language settings in their local browser. Thus, agents can see only 50 responses at a time.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
- Step 2** From the **Routing Strategy** page, choose **Resources > Predefined Chat Responses**.
- Step 3** Click **New**.
- Step 4** Enter the following details:

Setting	Description
Response Name	Contains the name of the predefined chat response. You can enter a name of maximum 40 characters.
Status	Contains the status of the predefined chat response. Deactivate the status to hide it from the agents in Agent Desktop.
Language	Choose the language of the predefined chat response from the drop-down list. You cannot edit the language of the chat response.
Queue	Choose the queue for which you want to define the chat response. If you select All from the drop-down list, all agents in all the queues in your organization can use the chat response. However, if any queue has reached the capacity of 50 messages, the system displays an error message with the names of the queues that have reached the limit. The system disables the queues that have reached the limit and you cannot choose them.
Content	Contains the text for the chat response. You can enter a maximum of 150 characters.

- Step 5** Click **Save**.

Configure Routing Strategies



Note Routing strategies will be obsolete in the future. It is recommended to use flows configured with business hours and outdial entry points.

If you want to proceed with routing strategies, consider the following aspects. For each entry point and queue, you should create a set of default routing strategies that cover all time intervals. In addition, you can schedule an alternate strategy beyond the default strategy for any time interval. For example, Queue 1 could have a BusyHourStrategy for the normal day shift and an OffHoursStrategy for non-business hours.

Flag the normal daily schedule as the default strategy. You can create a non-default strategy, such as a holiday schedule for a time interval that overlaps the default strategy. A strategy that is not flagged as default overrides a default strategy and is used as an exception to the default schedule. This means that the system first checks for a strategy that is not flagged as default, and if none exists, the system uses the default strategy.

When the default strategy is the current strategy (that is, the strategy that is currently running), the system checks every three minutes for a non-default strategy and if one is found, it becomes the current strategy.

If no strategy is specified for a time interval, and there is no default strategy for the time interval, the last strategy used by the system may continue as the current strategy even though it has expired. In this case, the system checks every minute for a valid strategy and as soon as it finds one, that strategy becomes the current strategy.

About Team Types

When you create or modify a queue routing strategy, the following options appear:

- **Agent-Based** teams have a known number of agents that are assigned to teams. Authorized users assign an agent profile to one or more teams. These agents use the Agent Desktop to interface with the Webex Contact Center system.
- **Capacity-Based** teams don't have specific agents that are assigned to them, and the agents don't use the Agent Desktop. For example, an outsourcer could have teams that use a PBX or an ACD to handle calls. You can use a capacity-based team to represent a voicemail box or an agent group, which Webex Contact Center doesn't manage.

When you create a routing strategy, you can mix team types. Remember that the accuracy of call routing to capacity-based teams depends on the capacity number specified.

Limitations of Capacity Based Teams

Webex Contact Center assigns calls to the capacity-based team by transferring the call to a Dial Number (DN). After the call transfers to a DN, Webex Contact Center disconnects from the call. Webex Contact Center isn't aware of the call status; that is, whether the capacity-based team answers, handles, or rejects the call.

This limitation causes the following behaviors:

- Tracking the contact after the call transfer isn't possible.
- Detecting RONA or call failures isn't possible.
- Recording the call isn't possible.
- Getting the Connect Time and Handled Time values isn't possible. Call report shows the value as zero (0).
- Setting the capacity isn't applicable, hence more calls could go to the capacity-based team.



Note When a static load-balancing strategy includes both agent-based and capacity-based teams, the system doesn't distribute calls to agent-based teams even if the call volume exceeds the capacity of the capacity-based teams.

View routing strategies for an entry point or queue

To view all routing strategies for an entry point or queue:

Procedure

Step 1 From the Management Portal navigation bar, choose **Routing Strategy**.

Step 2 Choose an entry point or queue from the **Select Entry Point** drop-down list to display the routing strategies for that entry point or queue.

For more information on the parameters that display on the **Routing Strategy** page, see [Routing strategy parameters, on page 14](#).

The upper section of the list view displays a table that lists all routing strategies available for the selected entry point or queue.

Note (Optional) Use the sort button at the end of the table to chronologically sort the strategies.

Step 3 To see details for a strategy, click the ellipsis beside the routing strategy and click **Edit**.

The lower section of the **Routing Strategy** page displays the Routing Strategy Mapping Details table, which:

- lists destination queues and entry points, which are based on the active routing strategies that you define for the selected entry point.
- lists the teams to which the system routes calls, chats, or emails, which are based on the active routing strategies that you define for the selected queue. Mapping details aren't provided for a queue routing strategy that simply redirects the call to another entry point or queue.

Note Your access privileges determine what you see in the Mapping Details table. For example, if the system routes calls for the Sales queue to Teams A and B, and you have access rights only to Team A, the mapping table shows only Team A as the destination for incoming calls.

Step 4 Click **Save**.

Routing strategy parameters

The following table describes the parameters that appear on the **Routing Strategy** page.

Column	Description
Name	Displays the name you assign to the strategy. You can't change the strategy name after you create it.
ID	Displays the system-assigned number of the strategy.

Column	Description
Status	<p>Indicates the status of the strategy.</p> <ul style="list-style-type: none"> • Current (appears in Red) means this is a snapshot of the currently running strategy. You can't copy the current strategy, but you can modify any setting that does not affect execution time or date. Changes to the strategy don't affect the recurring scheduled version of the strategy. <p>Note You can delete the current strategy, but don't delete it before you create a different strategy for the same time interval. If you delete a strategy without having another one in place, the last strategy used by the system becomes the default strategy although the start and end times and dates have expired. If this occurs, either create a new strategy for the current time period, or copy the default strategy and correct the time settings.</p> <ul style="list-style-type: none"> • Active means that the strategy is in effect at the specified start time on the specified start date. This is the default status. • Not Active means the strategy isn't in effect regardless of the specified start time and date. This status lets you save a strategy for future use or as a draft to continue with later.
Default	Indicates whether the strategy is the default. A strategy not flagged as the default overrides a default strategy and potentially replaces the default schedule.
Chat Template	Identifies the chat template used for the routing strategy.
Repetition	Specifies whether the strategy repeats daily or only on specific days of the week.
Start Date	Displays the date on which the strategy starts.
End Date	Displays the date on which the strategy ends.
Start Time	Displays the time at which the strategy starts (in 24-hour format) for any given day in the specified date range.
End Time	Displays the time at which the strategy ends (in 24-hour format) for any given day in the specified date range.
Time Zone	Displays the time zone if you enable the Multiple Time Zone feature when you create the entry point or queue.
Flow	Lists the associated call flows when a routing strategy is executing.

View the current routing strategies

You can view a list of currently deployed routing strategies for multiple entry points or queues.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
- Step 2** From the **Routing Strategy** page, choose **Resources > Current Routing Strategies**.
- Step 3** Choose **All** from the drop-down list to view current strategies for all entry points or queues.
- Step 4** Click **Apply**.

[Routing strategy parameters](#) provides details about the current routing strategies for the selected entry points or queues. The Flow column displays the names of the call flows associated with the listed entry points or queues.

View routing strategies by time zone

If you enable the Multiple Time Zone feature for your enterprise, you can configure entry points and queues with time zones. Time values that are used in the routing strategies are based on the time zone you configure for the entry point or queue. If you don't configure time zones with entry points and queues, the system uses the time zone that you configure for your enterprise (typically headquarters).

When you click your name button on the upper-right side of the **Routing Strategy** page, any time zones you configure for entry points or queues appear in a drop-down list.

If you do not enable the Multiple Time Zone feature for your enterprise, time values in routing strategies are based on the time zone you configure for your enterprise.

If the time zone observes daylight-saving time, the time adjusts automatically when the daylight-saving time changes.

Procedure

- Step 1** On the Management Portal, click the gears icon in the upper-right corner to view the three or four Tab keyed settings panel.
 - Step 2** Click the gears icon. Select a time zone from the **Time Zone** drop-down list.
 - Step 3** Click **Apply**.
 - Step 4** From the Management Portal navigation bar, choose **Routing Strategy** to view the routing strategies based on the selected time zone.
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Create a routing strategy

Use this procedure to create new routing strategies. You can also create a new strategy by editing an existing strategy.

Before you create new strategies:

- Always create an active strategy for every time interval. If you don't specify an active strategy for a time interval, the system uses the default. If there's no default strategy, the last strategy that the system used may continue as the current strategy although it has expired.

- You can easily create a new strategy from an existing strategy, change some settings, and save it as a new strategy.
- You can have only one routing strategy for each email entry point.
- You can't save changes to an active strategy when the scheduled dates or times conflict with an existing active strategy.

Before you begin

You must [Create a Chat Template](#) before you create a Chat Routing Strategy.

Procedure

Step 1 From the Management Portal navigation bar, choose **Routing Strategy**.

Step 2 At the **Routing Strategy** page, choose **Routing > Routing Strategies**.

Step 3 Choose an entry point from the **Select Entry Point** drop-down list.

Step 4 Do one of the following in the list view:

- Click **New Strategy**.

Note Global Routing Overrides only apply to Telephony channel type.

- OR -

- Click the ellipsis button beside an existing routing strategy with Active status and click **Copy**.

Step 5 Enter or modify the settings as described in the following tables.

Note You can create more than one strategy for a Telephony channel.

Table 1: General settings applicable in routing strategy

Setting	Description
General Settings	
Name	Enter a name for the strategy, such as US Holiday or Weekends. You can't edit this field after you save the strategy.
Enterprise Name	Shows the tenant name.
Status	<p>Click Active if you want the strategy to become effective on the start date that you specify in the Start Date field.</p> <p>Click Not Active if you want to save the strategy for future use or as a draft to work on later.</p> <p>The status is always Active for chat and email routing strategies as you can configure only one routing strategy for each entry point or queue.</p>

Table 2: Settings applicable in routing strategy for Telephony

Setting	Description
Time Settings (These are read-only for proxy queues.)	
Start Date End Date	Click in each of these fields and use the calendar controls to specify the start date (the date that the strategy becomes effective) and the end date (the date that the strategy expires).
Start Time End Time	Enter in 24-hour format (0000–2400) the time of day that you want the strategy to start and end.
Day of Week	From the drop-down list, choose All Days if you want to schedule the strategy for every day or Weekdays if you want to schedule the strategy for Monday through Friday only. -OR- Click each icon that represents a day on which you want to schedule the strategy.
Advanced Settings	
Music on Hold	Select the name of the audio (.wav) file to play for calls when an agent puts a call on hold. Music in Queue (MIQ) is handled from Flow. When a contact is queued and if no agent is available, the customer is engaged with MIQ.
Call Control	
Flag as Default Routing Strategy -or- Update as Default Routing Strategy	Choose the Routing Strategy. This setting is available only if you create a new strategy or copy an existing one. Set to Yes if you want this routing strategy to be the default routing strategy for the specified time interval for this entry point or queue. Set to No to create an exception to the default schedule, such as a holiday. This strategy overrides the default strategy. That is, the system first checks for a strategy that isn't flagged as default, and if none exists, the system uses the default strategy. Note Various routing strategies may be configured for a given time interval, but only one can be considered the current routing strategy. Webex Contact Center uses the following order of preference to decide the current routing strategy at any given time: 1. Global Routing Overrides 2. Default Global Routing Overrides 3. Routing Strategy 4. Default Routing Strategy
Flow	Select the flow from the drop-down list.

Table 3: Settings applicable in routing strategy for Email

Setting	Description
Email Account	You can add only one email account for each entry point. You can edit or delete the email account using the icons beside the email account name.

Setting	Description
Add Email Account	<p>Click the Add Email Account button to open the Add Email Account dialog box. Enter the following details:</p> <p>Email Address: Enter the email address to contact your organization.</p> <p>Inbound Server Settings: Enter the following server details for incoming emails:</p> <ul style="list-style-type: none"> • Incoming Protocol • Incoming Host • Inbound Encryption • Inbound Port Number <p>Outbound Server Settings: Enter the following server details for outgoing emails:</p> <ul style="list-style-type: none"> • SMTP Server • Outbound Encryption • Outbound Port Number <p>Server Authentication: Enter the username and password to connect to the email account.</p> <p>Note Ensure you use only secure access to mail servers, such as:</p> <ul style="list-style-type: none"> • SMTP, IMAP, or POP over SSL • SMTP, IMAP, or POP over TLS <p>Note Mandatory steps to use a Gmail account for an email channel are as follows:</p> <ol style="list-style-type: none"> a. Enable the IMAP option if you provide IMAP server to fetch mails in the server in the Gmail settings. b. Enable the Less Secure Apps flag in the Gmail account settings. c. Disable the captcha by logging into https://g.co/allowaccess. d. Update the credentials in the routing strategy and click Save. <p>Advanced Email Account Settings: Enter the following advanced settings for the email account:</p> <ul style="list-style-type: none"> • Maximum Attachment Size • Number of Attachment Limit • Mail Delay • Maximum Messages/Cycle

Setting	Description
Email Routing Rules	
You can add up to 20 email routing rules. Use the icon beside the rule to edit or delete the rule.	
Routing Rule	<p>Click the Add Routing Rule button to open the Add Routing Rule dialog box. Enter the following details to add a rule:</p> <p>Routing Rule Name: Enter the name for the rule.</p> <p>IF Email Subject Contains: Enter the text in the email subject to set the condition for the rule. You can add up to 10 conditions using the AND or OR operators. However, you can mix the AND and OR operators in a rule.</p> <p>Then: Select the email queue to which the email is queued if it satisfies any condition.</p> <p>Note The email can remain in a queue for a maximum of 240 days. After 240 days, the system removes the email from Webex Contact Center.</p>
Default Routing Rule	Select an email queue for the default routing rule in case none of the defined rules satisfy the criteria.

Modify a Routing Strategy

Before you modify a routing strategy, be aware of the following:

- Although you cannot copy the current strategy, you can modify any of its settings except those that affect execution time or date. These changes have no effect on the recurring scheduled version of the strategy.
- When you modify the current strategy, your changes take effect immediately for new calls and remain in effect until the current strategy ends. If there are calls in the queue when the modifications are made, the existing queued calls follow the original strategy unless you check the **Apply changes to current calls in queue** check box to the right of the **Save** button.



Note Changes made to the current Email or Chat entry point routing strategy are also applied to the corresponding active routing strategies.

- When you modify a strategy that is not the current strategy, your changes take effect according to the scheduled times specified in the strategy.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.

- Step 2** On the **Routing Strategy** page, choose an entry point or queue from the **Select Entry Point/Queue** drop-down list.
 - Step 3** Click the ellipsis button beside the strategy that you want to modify and choose **Edit**.
 - Step 4** Make your changes. For information about each setting, see the setting descriptions table in [Create a routing strategy, on page 16](#).
 - Step 5** If you modify the current strategy and want the changes to apply to calls currently in queue, check the **Apply changes to current calls in queue** check box on the lower right side of the page. If you don't check this check box, the changes only apply to new calls.
 - Step 6** Click **Save** to save your changes.
-

Routing Strategies Deletion and Restoration

When you delete a routing strategy, the system moves the strategy to the **Deleted Routing Strategies** or **Deleted Global Routing Overrides** page where it can be restored or permanently deleted within 30 days. After 30 days, the system permanently deletes the routing strategy.



Note When you delete a current strategy, the system activates the next strategy scheduled for that time period. Do not delete a current strategy unless an alternate strategy is available.

Delete a Standard Routing Strategy

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
- Step 2** On the **Routing Strategy** page, choose an entry point or queue from the **Select Entry Point/Queue** drop-down list.
- Step 3** Click the ellipsis button beside the routing strategy that you want to delete and click **Delete**.
- Step 4** Click **Yes** to confirm.

The system moves the strategy to the **Deleted Routing Strategies** page where it can be restored or permanently deleted (see [Restore or Permanently Delete a Routing Strategy, on page 22](#)).

Restore or Permanently Delete a Routing Strategy

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
- Step 2** On the **Routing Strategy** page, click **Deleted Strategies**.
- Step 3** Choose an entry point or queue from the **Select Entry Point/Queue** drop-down list.

Step 4 Click the ellipsis button beside the strategy that you want to either restore or permanently delete and do one of the following:

- To permanently delete the strategy, click **Delete**. Click **Yes** to confirm.
- OR -
- To restore the strategy, click **Restore**.

Step 5 If you are restoring a strategy, modify the settings as required, and click **Restore**.

Note You cannot restore a deleted Chat Entry Point Routing Strategy, if a Routing Strategy is assigned to the Entry Point.

If any settings conflict with an existing routing strategy, a message informs you. In this case, you must modify the settings before you can restore the strategy.

Audio on Hold

When a call is queued on the network, an audio file continues to play until the call is distributed to a team with available capacity. If the call is queued for longer than the length of the audio content, the audio file loops back and restarts from the beginning.

We recommend that the audio file include a brief delay message followed by music. The message should announce the name of the associated queue, instruct the caller to hold for the next available agent, and include a warning that calls may be monitored.

You can record one audio file for each strategy, so the message can vary by time of day, day of week, holiday schedule, and other factors.

Working with Global Routing Overrides

A global routing override is a routing strategy that applies to one or more Telephony entry points. When a call arrives at an entry point, the routing engine checks whether a Global Routing Override exists for that entry point. If a Global Routing Override exists, it becomes the current routing strategy for the entry point, overriding any standard routing strategies associated with that entry point.

Creating a global routing override enables you to change the routing strategies quickly and easily for many entry points simultaneously in urgent situations, rather than changing each routing strategy individually.

Global routing overrides operate in the Tenant time zone.

View global routing overrides

Use this procedure to view a list of global routing overrides.

Before you begin

You require Administrator access privileges to perform this procedure.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
The **Routing Strategy** page opens.
- Step 2** From the menu bar, choose **Routing > Global Routing Overrides**.
The **Global Routing Overrides** page opens to display the **Global Routing Overrides List**. This page displays all existing global routing overrides. You can use the **Search** function at the top-right of the List area to find your target. See [Global routing override parameters, on page 26](#) for a description of the parameters that are visible on the page.
- Step 3** (Optional) To export the list of global routing overrides for data analysis, click the ellipsis button near the top-right side of the page and click **Excel** or **CSV**.
- Step 4** (Optional) To display the details of a routing override or to edit it, click the ellipsis button at the left of the listed override and then click **Edit**. See [Edit a global routing override, on page 25](#) for further detail on editing a routing override.
-

Create global routing overrides

You can change the contact handling flow for multiple telephony entry points at the same time, such as for a holiday or emergency situation. Preconfigure one or more flows that you can apply quickly as an override when needed. When it becomes active, the global routing override only applies to new calls, while active calls follow the current entry point routing strategies.



Note By default, you create global routing overrides in the Tenant time zone. All the data that are displayed on the **Global Routing Overrides** page or dashboard are based on the Tenant time zone.

You can choose between two methods to create a global routing override:

Create a global routing override

Use this procedure to create a global routing override.

Before you begin

You require Administrator access privileges to perform this procedure.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
The **Routing Strategy** page opens.
- Step 2** From the menu bar, choose **Routing > Global Routing Overrides**.

The **Global Routing Overrides** page opens to display the **Global Routing Overrides List**. This page shows all existing global routing overrides.

Step 3 From the **Global Routing Overrides** page, click **+ New Override**.

The **Create Global Routing Override** page opens.

Step 4 Configure the new global routing override as described in [Global routing override parameters, on page 26](#).

Step 5 Click **Save** or **Cancel**.

Create a global routing override from a copy

Use this procedure to create a global routing override from a copy of an existing override.

Before you begin

You require Administrator access privileges to perform this procedure.

Procedure

Step 1 From the Management Portal navigation bar, choose **Routing Strategy**.

The **Routing Strategy** page opens.

Step 2 From the menu bar, choose **Routing > Global Routing Overrides**.

The **Global Routing Overrides** page opens to display the **Global Routing Overrides List**. This page shows all existing global routing overrides.

Step 3 Locate the global routing override you want to copy to create a new override. You can use the **Search** function at the top-right of the **Global Routing Overrides List** area to find your target.

Step 4 Click the ellipsis button to the left of a listed override, and then click **Copy**.

The **Copy Global Routing Override** page opens.

Step 5 Change the settings as required, and in accordance with instructions provided in [Global routing override parameters, on page 26](#).

Step 6 Click **Save** or **Cancel**.

Edit a global routing override

Use this procedure to edit an existing global routing override.

Before you begin

You require Administrator access privileges to perform this procedure.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
The **Routing Strategy** page opens.
- Step 2** From the menu bar, choose **Routing > Global Routing Overrides**.
The **Global Routing Overrides** page opens to display the **Global Routing Overrides List**. This page shows all existing global routing overrides.
- Step 3** Locate the global routing override you want to edit. You can use the **Search** function at the top-right of the **Global Routing Overrides List** area to find your target.
- Step 4** Click the ellipsis button at the left of the entry point you want to modify, and then click **Edit**.
The **Overwrite Global Routing Override** page opens.
- Step 5** Edit the routing override parameters in accordance with the information provided in [Global routing override parameters, on page 26](#).
- Step 6** Click **Save** or **Cancel**.
-

Global routing override parameters

The following sections describe the parameters you see on the various pages that constitute the global routing override user interface.

Parameters for Global Routing Overrides page

The following table lists and describes the parameters you see in the **Global Routing Overrides List** area on the **Global Routing Overrides** page.

Column	Description
Name	Displays the name you assign to the override. You can't change the override name after you create it.
ID	Displays the system-assigned number of the override.

Column	Description
Status	<p>Indicates the status of the override.</p> <ul style="list-style-type: none"> • Current (appears in Red) means this is a snapshot of the currently running override. You can't copy the current override, but you can modify any setting that doesn't affect execution time or date. Changes to the override don't affect the recurring scheduled version of the override. <p>Note You can delete the current override, but don't delete it before you create a different override for the same time interval. If you delete an override without having another one in place, the last override used by the system becomes the default override although the start and end times and dates have expired. If this occurs, either create a new override for the current time period, or copy the default override and correct the time settings.</p> <ul style="list-style-type: none"> • Active means that the override is in effect at the specified start time on the specified start date. This is the default status. • Not Active means the override isn't in effect regardless of the specified start time and date. This status lets you save an override for future use or as a draft to continue with later.
Default	Indicates whether the global routing override is the default routing strategy (Yes) or isn't the default routing strategy (No).
Repetition	Specifies whether the override repeats daily or only on specific days of the week.
Start Date	Displays the date on which the override starts.
End Date	Displays the date on which the override ends.
Start Time	Displays the time at which the override starts (in 24-hour format) for any given day in the specified date range.
End Time	Displays the time at which the override ends (in 24-hour format) for any given day in the specified date range.
Time Zone	<p>Displays the Tenant time zone.</p> <p>Global routing overrides operate in the Tenant time zone.</p>
Flow	Lists the associated call flows when a routing override is executing.

Parameters for Create, Overwrite, Copy, and Restore Global Routing Override pages

The following table lists and describes the parameters that you see on the:

- **Create Global Routing Override** page
- **Overwrite Global Routing Override** page
- **Copy Global Routing Override** page

- **Restore Global Routing Override** page

Use this information to configure new or copied overrides and edit existing ones.

Parameter	Description
General Settings	
Name	Enter the name for the global routing override. You can't change the name after it's created. If you copy an override, you can change the name of the copy.
Enterprise Name	Displays the name of the Tenant.
Channel Type	Displays the only valid channel type: Telephony
Entry Points	This field appears only if you are creating or copying a global routing override. Choose the entry points to which the global routing override applies.
Status	Click the Status toggle button to set the status of the global routing override to either Active or Not Active . When set to Active , the routing override activates and deactivates on the dates and at the times specified in the related Start and End Date and Start and End Time fields.
Time Settings	
Time zone	Displays the Tenant time zone. Global routing overrides operate in the Tenant time zone.
Start Date End Date	Click in each of these fields and use the calendar controls to specify the start date (the date the global routing override becomes effective) and end date (the date the global routing override expires).
Start Time End Time	Enter in 24-hour format (0000–2400) the time of day you want the global routing override to start and end.
Day of Week	From the drop-down list: <ul style="list-style-type: none"> • Choose All Days if you want to schedule the global routing override to run every day. • Choose Weekdays if you want to schedule the global routing override to run from Monday through Friday only. • Choose Specific Days, and click the icons representing weekdays if you want to schedule the global routing override to run on specific days of the week.
Advanced Settings	

Parameter	Description
Music on Hold	From the drop-down list, choose the name of the audio (.wav) file to play for calls when an agent puts a call on hold. Music in Queue (MIQ) is handled from Flow. When a contact is queued and if no agent is available, the customer is engaged with MIQ.
Flag as Default Routing Strategy	<p>This setting is available only if you create a new override or copy an existing one.</p> <p>Set to Yes if you want this global routing override to be the default global routing override for the specified time interval for this entry point.</p> <p>Set to No to create an exception to the default schedule, such as a holiday. This override overrides the default override. That is, the system first checks for a override that isn't flagged as default, and if none exists, the system uses the default override.</p> <p>Note You can configure different routing strategies for a given time interval. However, Webex Contact Center prioritizes only one routing strategy. Webex Contact Center uses the following order of prioritization to decide the current routing strategy at any given time:</p> <ol style="list-style-type: none"> 1. Global Routing Overrides 2. Default Global Routing Overrides 3. Routing Strategy 4. Default Routing Strategy
Call Control	
Flow	Choose a flow to override the contact handling behavior for the selected entry points during the configured time period.

Delete a global routing override

Use this procedure to delete a global routing strategy.

Before you begin

You require Administrator access privileges to complete this procedure.

Procedure

-
- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
The **Routing Strategy** page opens.
- Step 2** From the menu bar, choose **Routing > Global Routing Overrides**.

The **Global Routing Overrides** page opens to display the **Global Routing Overrides List**. This page shows all existing global routing overrides. See [Global routing override parameters, on page 26](#) for a description of the elements that are visible on the page.

- Step 3** Locate the global routing override you want to edit. You can use the **Search** function at the top-right of the **Global Routing Overrides List** area to find your target.
- Step 4** Click the ellipsis button to the left of the routing override you want to delete, then click **Delete**. In the confirmation dialog box that opens, click **OK**.

The routing override moves to the **Deleted Global Routing Overrides** page where it awaits restoration or permanent deletion. For more information, see [Restore or Permanently Delete a Routing Strategy, on page 22](#).

Restore or permanently delete a global routing override

Use this procedure to restore or permanently delete a global routing override.

Before you begin

You require Administrator access privileges to perform this procedure.

Procedure

- Step 1** From the Management Portal navigation bar, choose **Routing Strategy**.
The **Routing Strategy** page opens.
- Step 2** From the menu bar, choose **Routing > Global Routing Override**.
The **Global Routing Overrides** page opens to display the **Global Routing Overrides List**. This page shows all existing global routing overrides. See [Global routing override parameters, on page 26](#) for a description of the parameters that are visible on the page.
- Step 3** Click the **Deleted Global Routing Overrides** button at the top-right side of the page.
The **Deleted Global Routing Overrides** page opens displaying a list of deleted routing overrides, if any exist.
- Step 4** In the **Deleted Global Routing Overrides** List view, locate the routing override you want to either restore or permanently delete. You can use the **Search** function at the far-right of the page to locate your target.
- Step 5** Click the ellipsis button to the left of the routing override you want to either restore or permanently delete and do one of the following:
- (Optional) To permanently delete the override, click the **Delete** icon. Click **Yes** in the confirmation dialog box to commit.
The **Deleted Global Routing Overrides** page immediately refreshes, excluding the deleted routing override.
 - (Optional) To restore the override, click the **Restore** icon. Click **Yes** in the confirmation dialog box to commit.
The **Restore Global Routing Override** page appears, displaying the settings for the routing override.

You can change some of the settings in accordance with the information that is provided in [Global routing override parameters, on page 26](#).

Click **Restore** to save changes and confirm reactivation of the override.

Note If any settings conflict with an existing routing override, a message informs you. In this case, you must modify the settings before the override restores.

The **Deleted Global Routing Overrides** page immediately refreshes, excluding the restored routing override.

■ Restore or permanently delete a global routing override