



ANNEXURE B

CLOUD PBX AND CONTACT CENTRE
System Functionality
<ul style="list-style-type: none"> • End to end managed solution with maintenance and support; • Central Interface for management of all users at all levels including reporting and billing for ease of administration • VOIP Quality management and monitoring; • System should provide for Redundancy and reliability; • Remote and mobile users integration with smart technology (laptops, tablets, phones etc.)
Features of the Cloud PBX <ul style="list-style-type: none"> • Alerts; • Busy lamps; • Call screening; • Classes of service (access/ priority levels); Multi-level (Precedence and Pre-emption during peak times); • Call routing capabilities, e.g. forwarding, transfer, call waiting, etc.; • Click to dial, transfer and retrieve calls (soft phones); • Caller line ID; • Auto call back • Call conference capabilities (full function internal and external) • Virtual phones; • Numbers forwarded to SIP phones (extensions), voicemail, or forwarded when not available; • Voice mailboxes; • Voice mail sent to handset and/or email; • Call history; • Pick-up groups; • Hunt groups; • Speed dial • Internal call directory • IVR menus (digital receptionist); • Extensions; • User access must be able to make calls using via a secure PIN and Active Directory or similar authentication when using both handset and softphone.

Reception capabilities

- The Operator must be able to see when a device is busy
- Monitors colleagues busy/ not busy calls
- Transfer calls/ Receive back unanswered calls
- Perform standard reception operations
- Touch screen
- Voice recognition software

Storage/ Recording

- Must be able to record and store calls for a period of six (6) months, preferably in an encrypted format
- Must be able to retrieve recordings for DR purposes at regular intervals

Mobility

- Calls can be forwarded to alternative numbers, allowing transfer of calls of staff not currently in the office

Call Administration

- Hunting/ Re-routing/ IVR/ Caller line identification must be available for incoming or outgoing calls
- Filter extensions into groups
- Music and message played while callers remain on hold and ability to upload such (SASSETA to provide scripts for the messages)

Telephone Management System Administration

- Administration interface/ management console must be via a secure web enabled interface running on an internet browser
- Full management of the Cloud PBX system from the console;
- Administrators must be able to produce cost and usage reporting per department per user; billing; call type breakdown; call logs; real-time call costs; individual call history (date, time, numbers dialed); Access by role; and must be able to export reports in CSV and or PDF formats.
- Report call trends/ statistics and analysis including graphical formats;
- Alarms on extended call duration or long-distance connections;
- Set-up account credit restrictions, monitoring and control at an organizational or user level;
- Upload Interactive Voice Response messages via the web interface; upload music on hold; upload or terminate on hold messages; after-hours greetings, etc.;
- Must be able to apply Answering Rules to give the ability to choose how incoming calls are handled - auto routing;
- Set up auto-attendant (custom main greeting) to automatically greet and direct callers to the appropriate extension using a pre-recorded message chosen by the caller;
- Management of media (tones, music, digital receptionist, menu recordings);
- Ability to create, update or delete accounts;
- User extension profile;
- Graphical status of extensions;
- Must be able to distinguish between local, national and international outgoing calls;
- Be able to block or allow certain numbers - dial out restrictions per user;

Agents' stations

- Minimum requirements: :
 - Name of Agent, Number, Status, Group, DNIS (Dial Number Identification, Specification, Call length, Start time, End Time, Outbound or Inbound
- Integration into MS365 for CRM

Integration into email

- **Provides following minimum agent status**
 - Ready or Not Ready
 - Agent logged in or out
 - Agents Busy
 - Agents Idle

<p>Call abandoned Calls Dropped Missed calls Call back Call duration Conference calls</p> <p>Key word segmentation of call nature (minimum of up to 30 Segments)</p>
<p>IVR (Interactive Voice Response) capabilities</p> <ul style="list-style-type: none"> SASSETA will provide the script
<p>Integrated Communication</p> <ul style="list-style-type: none"> Voice, email, chat, SMS, social media integration Unified agent desktop to manage all channels in one place
<p>AI & Automation</p> <ul style="list-style-type: none"> Chatbots and voice bots for basic queries Sentiment analysis and real-time agent assist
<p>Auto Attendant (on hold messaging after hours / office closure)</p> <p>SASSETA will provide the script</p>
<p>Managing Call Queues</p> <ul style="list-style-type: none"> Distribution of calls to first available agent Simultaneous call distribution <p>Calls alert all available agents at once. The first available agent handles the call</p>
<p>Call Transfers (to other employees)</p>
<p>Group Pick ups</p> <ul style="list-style-type: none"> Anyone can answer a ringing phone in a department
<p>Placing calls on Hold</p> <ul style="list-style-type: none"> (IVR in background)
<p>Skills base routing</p> <ul style="list-style-type: none"> Connects a particular call to a specific agent.
<p>Automatic call back</p> <ul style="list-style-type: none"> A caller who gets a signal that an agent is busy can instruct the system to call them back
<p>Voicemail Routing when agents are busy</p> <ul style="list-style-type: none"> The calls are routed to the agents voice mail when busy or dial the direct extension of the agent
<p>Real Time (ACD) Monitoring (HD Television)</p> <ul style="list-style-type: none"> HD Monitoring display (50 Inches, HP) Monitor display real time call activities in the contact centre e.g. Calls received/dropped or abandoned. Duration of calls and calls holding in the queue Real-time resource management tools for the supervisor to display how management will view information by agent groups, queues, answering agent, or call treatments. The real time information must be able sortable and offer a minimum of 10 simultaneous accesses Screen refresh rate should be a minimum of every 60 seconds for the real time display stations and exceptions should be highlighted and identified. The real time display solution must provide for the display of real time statistics on wallboards that are visible to all agents in the contact centres at all sites. The display must make use of multiple colors.

- The wall board must be able to display messages to all CRAs generated by supervisors or the contact centre manager. These messages can be generated and edited through a desktop application.
- Communication between Wallboards and CTI Server must be IP based
- Integrated approach with website required: Website Quick Chat metrics must be displayed on screen.
- Scorecards, coaching tools, and performance feedback for agents

Call Configurations/Call Overflows and diverting of call capabilities

- Calls can be diverted the other departments for assistance in the contact centre without being present in the contact centre

Recording

- The voice recording solution must be integrated into the contact centre application. Recording should be configured to allow automatic recording or to allow agent requested recording.
- All recordings must be stored in a database on a server and allow searches by agent or caller's account number and allow play back via the headset either at the agent's desk or at the supervisor's desk.
- A supervisor / manager must be able to select to record an agent's call for training purposes.
- An application must provide for search and retrieval of recordings.

Recordings should be available for e-mailing to a client, supervisor or agent.

Management Reporting

- Statistical and use base reporting must be available on both summary as well as detailed level with the ability to draw analytical information on granular level.
- Standard reports must be provided together with a report writing tool to allow the development of customer reports.
- The definitions of data elements must be available and readily accessed and clearly defined to allow the development of reports directly off the database.
- Historical ACD statistic information must be available by agent, group, queue, day of week, etc.
- Thresholds and exceptions must be set through a control or management tool and then highlighted or tracked within the historical information during reporting and online displays.
- To allow "cradle to grave" reporting it must be possible to filter historical information application by application or information elements not relevant to desired end-user reports.
- Agents must be able to move from desk to desk and have their statistics follow them.
- Up-to-the minute reports must be available for queues, stations, agents, and lines without causing problems with the real-time processing of calls.
- Reports must be exportable in HTML and Excel format and made available on an Intranet.
- Once information from call statistics is logged, there must not be any process that will allow the manual changing of the information and data.

Must be able to export reports to text files or MS Excel spreadsheets.

Supervisor or contact centre management

- Supervisor OR Manager need a LAN based workstation or terminal to display the Contact Centre data, define limitations and provide access to ACD configuration and routing changes, queue assignments and queue routing changes.
- Supervisors or Manager must be provided with the necessary tools to quickly respond to the changes in call volumes between various queues.

Supervisors or Manager must also be able to exist in different states i.e. monitoring, observing, and reporting.

Contact Centre Software Upgrades Regular upgrades of software should be conducted and service reports from the supplier must be included the SLA agreement

Emails and CRM

Emails must be automatically echoed on the contact centre CRM system for reporting and statistical purposes.

Monitor and improved quality of calls

Manager can listen in on calls for quality assurance and assessment of agents