



FortiVoice™ Enterprise Phone System  
Skill-based Routing  
Technical Note



## FortiVoice Enterprise Phone System Skill-based Routing Technical Note

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1st Edition

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# Configuring Skill-based Routing

Depending on the agents skill sets and the nature of your business, you can classify agents into different groups, such as Billings, Sales, and Support.

Skill-based routing allows a call to be answered by the most appropriate agent.

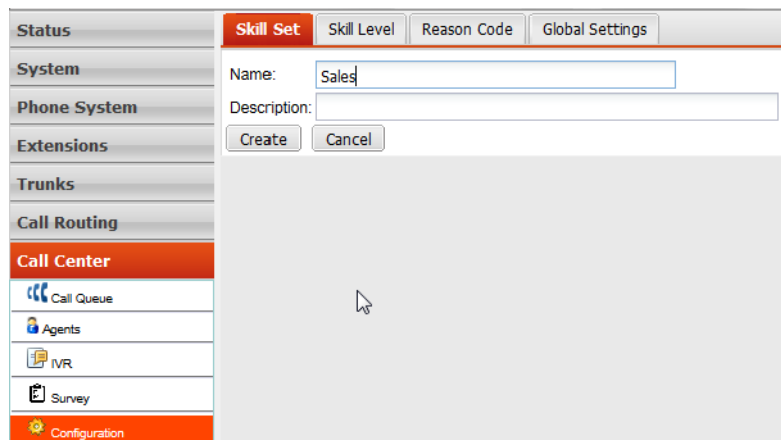
Typically, when a customer dials an organization's support hot line, an auto attendant requests the customer to choose the support group by pressing a number on the dial pad. The call is then routed to the configured virtual number to be processed.

A skill-based routing is configured using the FortiVoice Enterprise Phone System (FVE) call center, extension, and virtual number features.

This technical note assumes that you use the FVE 5.0 software. Use this note in conjunction with the *FortiVoice Enterprise Phone System Administration Guide*.

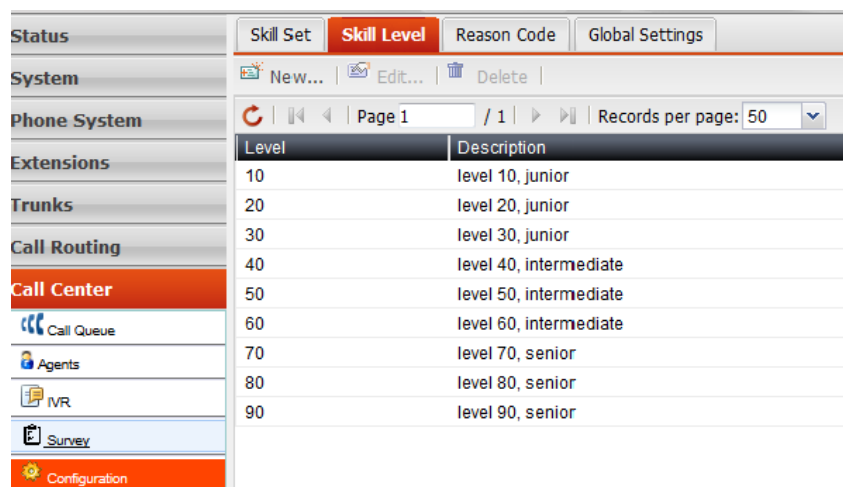
## To configure skill-based routing

1. On the FVE web UI, go to *Call Center > Configuration > Skill Set* and click *New*.



The screenshot shows the 'Skill Set' configuration page in the FortiVoice web UI. The left sidebar is expanded to 'Call Center' > 'Configuration'. The main content area has tabs for 'Skill Set', 'Skill Level', 'Reason Code', and 'Global Settings'. The 'Skill Set' tab is active, showing a form with 'Name: Sales' and an empty 'Description' field. There are 'Create' and 'Cancel' buttons below the form.

2. Create your skill sets, such as Sales, Shipping, and Billings.
3. Go to *Call Center > Configuration > Skill Level*. You can add new levels or use the default ones.

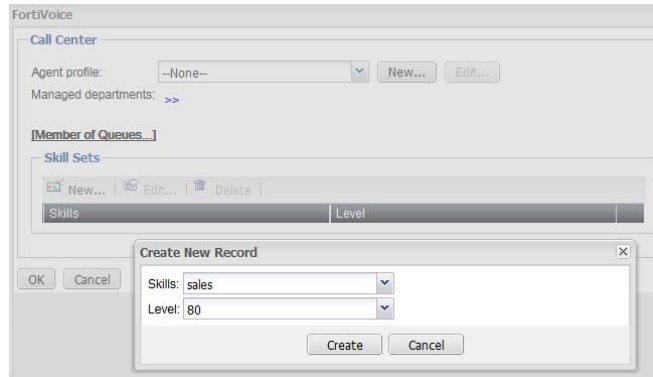


The screenshot shows the 'Skill Level' configuration page in the FortiVoice web UI. The left sidebar is expanded to 'Call Center' > 'Configuration'. The main content area has tabs for 'Skill Set', 'Skill Level', 'Reason Code', and 'Global Settings'. The 'Skill Level' tab is active, showing a table of skill levels. The table has columns for 'Level' and 'Description'. There are 'New...', 'Edit...', and 'Delete' buttons at the top of the table. The table shows levels 10 through 90 with descriptions like 'level 10, junior', 'level 40, intermediate', and 'level 90, senior'.

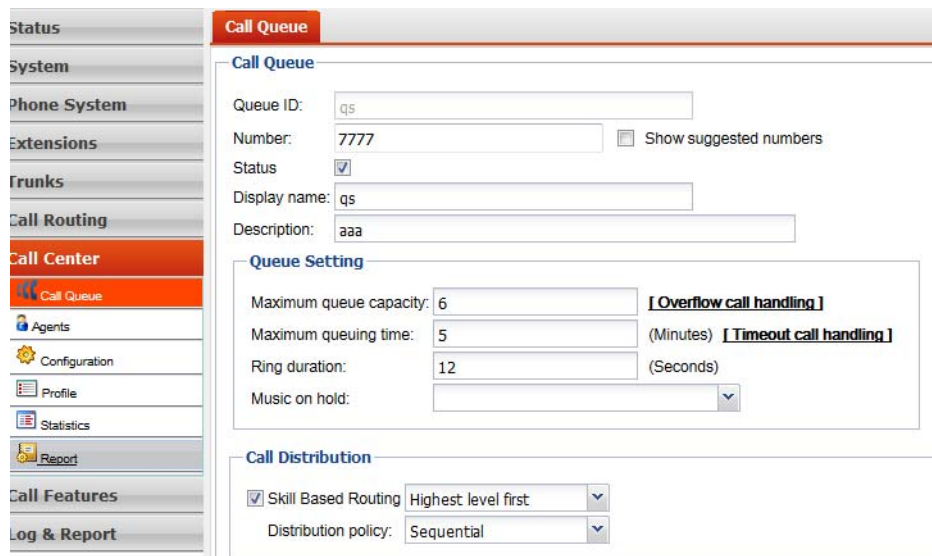
Level	Description
10	level 10, junior
20	level 20, junior
30	level 30, junior
40	level 40, intermediate
50	level 50, intermediate
60	level 60, intermediate
70	level 70, senior
80	level 80, senior
90	level 90, senior

4. Go to *Extensions > Extensions > IP Extensions*.

5. Select an agent's extension and go to *Call Center*. Enable the agent and click *Configure*.



6. For *Skill Sets*, click *New* to select the skill set for the agent, including skill and level, and click *Create*.
7. Click *OK*.
8. Repeat step 5 to 7 for the agents with the configured skill sets.
9. Go to *Call Center > Call Queue > Call Queue* and do the following:
  - a. Select the queue to which you want to route calls based on skills and go to *Call Distribution*.



- b. Select *Skill Based Routing* and choose a routing option:
  - Lowest level first: The call will ring the agent with the lowest skill level score first and move up the rank if the agent is unable to take the call, that is, the agent's extension is in a Not Ready status.
  - Highest level first: The call will ring the agent with the highest skill level score first and move down the rank if the agent is unable to take the call, that is, the agent's extension is in a Not Ready status.
- c. Select a call *Distribution policy*. This option only applies to the situation when you have agents with the same skill level in a queue. In such cases, calls are distributed to these agents according to this policy.

10. Go to *Extensions > Virtual Number* and click *New* to create a virtual number for the skill-based routing.

**Virtual Number**

Name:

Number:   Show suggested numbers

Display name:

Enabled:

Comment:

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**Call Handling**

New... | Edit... | Move | Delete

Schedule	Action	Target

Create Cancel

11. Configure the *Call Handling* option to route the skill-based calls. Two actions are needed. One is to tag the call with a skill so that it is processed as a skill-based call. Another action is to route calls to queues where the agents with configured skill levels belong to.

a. Action one:

- i. Click *New* under *Call Handling*.

**Call Handling Setting**

Schedule: --None--

Action:

Extension:

Create Cancel

- ii. For *Action*, select *Call queue skill tag*.
- iii. For *Skill*, select one of the three configured skills.
- iv. Click *Create*.

b. Action two:

- i. Click *New* under *Call Handling*.
- ii. For *Action*, select *Call queue*.
- iii. For *Call queue*, select a queue where you want to route the calls to.
- iv. Click *Create*.

The configured call handling is as below.

**Call Handling**

New... | Edit... | Move | Delete

Schedule	Action	Target
any_time	Call queue skill tag	TAC_Fortivoice
any_time	Call queue	qs

12. Click *OK*.

