<COMPANY NAME>

<PRODUCT NAME>

Product Handbook & Service Description

<DATE>

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# CONFIDENTIALITY

All information in this document is provided in confidence as per the terms and conditions of <PRODUCT NAME>) and shall not be published or disclosed wholly or in part to any other party without <COMPANY NAME>’s prior permission in writing. These obligations shall not apply to information which is published or becomes known legitimately from some source other than <COMPANY NAME>.

# VERSION CONTROL

This document is controlled and issued by <NAME> <JOB TITLE>.

Please ensure that you have the latest version of this document which can be downloaded from <URL>.

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# INTRODUCTION

The following document describes how we will support the delivery of <PRODUCT NAME> as well as how we will support the product in-life.

## Product Overview

<PRODUCT NAME>is a (white-labelled) cloud IVR solution which adds a significant amount of functionality and value in the network; providing initially inbound functionality but with outbound capabilities also coming in the roadmap in the near future.

<PRODUCT NAME>is a self-service solution at both the reseller and end customer level which is really easy to use and manage in-life. Removing the traditional overheads in using complex, multiple systems or paying external providers to manage services on your behalf.

It offers:

* Interactive Voice Response (IVR)
* Call Recording
* Smart Call Routing
* In Network Call Queuing
* Custome Music on Hold/Messaging
* Call Back Capabilities
* Reporting Suite
* Audit Logging

## Key Capabilities

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| **IVR** | Sophisticated IVR, including:* Advanced time of day control – pre-select your business operating hours in advance, with the flexibility to change on demand
* Digit capture – control your call flow and capture data to suit your business needs
* Text to speech – generate prompts, welcome messages, etc.
* Intelligent Call Routing – manipulate call routing based on business defined parameters, for example caller CLI
* Database lookup – ability to look at external locations and pull back information
 |
| **Call Recording** | <PRODUCT NAME> can record all calls, or selectively record calls based on end users requirements:* Full end to end recording – control when the recording starts and ends
* Calls available in real time – no need to wait; once the call is complete, the recording is available for playback or download
* Web based portal access – allows instant control across multiple browsers
* Supports storage in both the <PRODUCT NAME> platform (standard 30 days retention) or customers own cloud storage – ability to integrate with 3rd party storage solutions, such as Box.com and AWS
 |
| **Smart Call Routing** | Routing options based on:* Destination number – for example presenting a local number to your customer
* Time of day – for example route calls to other locations based on time of day
* Digit input – for example capturing membership or account number to direct you to correct departments
* Speech routing [roadmap] – for example based on recognition of post code, or department routing using key words
* Call volume – for example redirect calls away from your busiest centres
* Other business rules
 |
| **In network call queueing** | * In network queueing allows calls to be queued in the cloud if an endpoint is busy. Calls will continue to queue, holding their position until the endpoint becomes available. Retry options can be based on customer requirements
* Queue limits can be set based on user parameters with overflow options available, for example delivering a call to an alternative destination after a set time, or when the queue reaches a certain threshold length
* CallMEBack with valet slots held for customers allowing automated callbacks for those who don’t wish to queue
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| **Custom Music on Hold and Messaging** | * Music on Hold – allows the upload of multiple sound files and formats to provide customised user experience
* Messaging – provides personalised in queue announcements and interactions, for example playing position in queue and expected wait time
 |
| **Text to Speech** | * Allow the creation of sound files for use within an IVR flow
* Provides the capability to read back values to callers in an IVR flow, for example input account code and have balance read back
* Provides the capability for in queue messaging, such as position and expect time in queue
 |
| **Reporting** | * Scheduled reports – allows automated deliver of key management information
* Data export – the ability to export data so you can work with it in a way that suits your business
 |
| **Ease of use** | The <PRODUCT NAME> GUI (graphical user interface) is accessed easily online via any supported browser and is designed to be simple to use, so that all administration can be undertaken by the end user. It puts the power to respond to changes in operational requirements in the hands of the business, or should the reseller choice to offer that as a managed service they would simply retain access control themselves.  |
| **Scalability**  | Elastic in network scalability to support business requirements whether its handling 1 or 1,000 simultaneous calls |
| **Fast Time to Service** | <PRODUCT NAME> is a cloud based solution, so resellers can be established and using/selling the service in weeks. End customers can be created in minutes and using the self-service portals can create sophisticated call flows quickly and easily |
| **Proven** | Based on best of breed technology selected and rigorously tested by BT and leveraging our core voice and data networks to provide a robust and reliable solution for customers |

# <PRODUCT NAME> SOLUTION OVERVIEW

<PRODUCT NAME> is a cloud solution which <COMPANY NAME> has deployed using selected best in breed software coupled with a sophisticated network architecture which leverages our core data and voice networks to provide customers a unique product. Whilst the complete details of the architecture cannot be shared for security purposes, an overview of the solution topology is included below for reference.



## Platform Overview

<PRODUCT NAME> is a cloud solution that is hosted out of two Tier 4 data centres that are directly linked to BTs core data and voice network for the provision of the end to end service.

<PRODUCT NAME> has a comprehensive monitoring, detection and alerting system that provides complete visibility of the infrastructure which is monitored 24/7 by a team of highly experienced engineers, enabling a shift from reactive to proactive network monitoring and customer care.

## Platform Upgrade Procedures

Due to the nature of <PRODUCT NAME> as a cloud solution, customers will benefit from an on-going development cycle. <PRODUCT NAME> will continue to evolve and develop with market demand and we pass on these benefits as part of the service to ensure that customers have access to the latest features and benefits.

This means multiple times a year there will be roll outs of new software upgrades, some of these will be small changes to improve usability with operational features and some will be full version changes. These will all be communicated to customers no less than 1 week in advance of the proposed upgrade date. Full documentation will be provided on the changes contained in the release detailing any feature changes and additions.

Upgrades take place during an agreed change window. These change windows will always be outside normal office hours to reduce the impact of any potential associated service outage on customer operations.

## Supported Browsers

Access to the portals for <PRODUCT NAME> are through a web based GUI which is accessible through most recent versions of the common web browsers including Internet Explorer, Firefox, Chrome and Safari. A full breakdown follows.

The following browsers are supported by <PRODUCT NAME>:

| Browser | Version |
| --- | --- |
| Firefox | 58 |
| Chrome | 64 |

Whilst other browsers outside this list will often be able to access the <PRODUCT NAME> portals, they would not be supported by BT Wholesale i.e. if the customer (reseller or end customer) was using <PRODUCT NAME> with a browser not on this list and raised a fault/issue to BT that was related to the behaviour of <PRODUCT NAME>within that browser, we would not be able to provide support. We would therefore always recommend that customers upgrade/change their browser to one of the supported versions above.

# <PRODUCT NAME> GUI (GRAPHICAL USER INTERFACE) AND FUNCTIONALITY

<PRODUCT NAME> is accessed, configured and used by resellers and customers through a single multi tiered interface:

## Reseller portal

Used by the <PRODUCT NAME> reseller to set permissions, create customers, allocate resources, numbering, control branding, review audit logs and retrieve billing information

Reseller portal capabilities include:

|  |  |
| --- | --- |
| Homepage | View current customersChange user password |
| Settings | Configure portal branding, including colour, logo and backgrounds |
| Users | Create new usersDisable existing usersChange passwords |
| Create | Create a new customerSet customer nameSet up customer brandingSet up customer URLsAllocate functionality to customer |
| Customers | Review existing customersUpdate settings against existing customersLogin as customer using single sign-on |
| Logs | Retrieve audit logging information |
| Numbers | Review allocated numbersAllocate numbers from pool to customers |
| Scheduler | Set up Emails and SFTP for Report ExportExport CDRs |
| CDR Reports | Access CDR reports for your customers |

## Customer Portal

Used by the end customer to manage their user settings, branding (if given access by reseller), call flows, queues, reports, call recordings, sounds, operational hours and number mapping.

Customer portal capabilities include:

|  |  |
| --- | --- |
| Homepage | View real time dashboardsCreate alarms based on threshold valuesConfigure alarms to provide visual and audible notificationsConfigure all queues simultaneously or individually |
| Settings | Configure portal branding, including colour, logo and backgroundsEnable or Disable top level support |
| Users | Create new usersDisable existing usersChange passwords |
| Call recordings | Retrieve call recordingsSearch based on pre-defined criteria such as date, and CLIListen to call recordingsDownload call recordings |
| Reporting | Configure reportsDownload reportsReports available:* CDR
* DNIS Activity
* IVR Digit Capture
* Queue Activity
* IVR Activity
 |
| Logs | View full audit log of all activity within the portal |
| Numbers | Map inbound numbers to IVRsCreate predefined diverts for regular use within IVRs or queuesSet up Divert Groups |
| Hours | Create operational hours rules based on time of day, day of week and datesSet up special days in advance (such as Bank Holidays) |
| Sounds | Upload sound filesDelete sound filesPreview sound filesUse the TTS (text to speech) engine to create new sound filesDownload sound filesView which Sound Files are currently In Use |

|  |  |
| --- | --- |
| IVR builder | Create new IVRsDelete IVRsUpdate existing IVRsDrag and drop canvas for IVR creation and updatesView or edit your Templated IVRsStandard IVR objects include:* Hours Check
* Test Value
* Wait
* Read Value
* Digit Capture
* Play sound
* Call Transfer
* Bridge Out
* Go to IVR
* Voicemail
* End Call
 |
| IVR Templates | Create IVRs with a simple wizard: * 1-2-1
* 1-2-1 + Call Recording
* 1-2-1 Plus
* 1-2-1 Whisper
* Sequential Distribution
* Voicemail
* Queue
* Auto-attendant
* Percentage Distribution
* Simultaneous Distribution

Group your Templated IVRsView and Edit your Templated IVRs |
| Queue Manager | Create new queuesGroup queues togetherUpdate queue configurationsAllocate hold musicConfigure queue lengths and overflow settingsConfigure queue out options including deliver to DDI and presentation CLIEnable events on queues which include playing messages, prompts such as position in queue and expected wait timeOffer call backs to customers when queue reach predefined thresholds  |
| Scheduler | Set up Emails and SFTP for Reports ExportSet up SFTP for Call Recordings ExportExport Reports and Call Recordings on a Daily, Weekly or Monthly basis |

|  |  |
| --- | --- |
| Voicemail | Retrieve voicemailSearch based on pre-defined criteria such as date, and CLIListen to voicemailsDownload voicemails |
| DR Plan | Set up a ‘one-click’ DR planPoint your existing IVRs at a DR targetIn event of DR situation, swap your IVRs with their DR target with one click |

# **BECOMING AN <PRODUCT NAME> RESELLER**

Once you have expressed your interest in selling <PRODUCT NAME>, INSERT SERVICE ESTABLISHMENT DETAILS HERE >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>

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Service Establishment includes (high level) the following key elements;

* Systems access set up and enablement
	+ Enabling capability for channel partners to access <PRODUCT NAME>
	+ Enabling capability for channel partner to raise faults through the <PRODUCT NAME>Helpdesk
* Billing account creation
	+ Creating of new <PRODUCT NAME>billing account for channel partner
	+ Capture and implementation of new direct debit for <PRODUCT NAME>charges
* <PRODUCT NAME> deployment
	+ Deployment of your instance of <PRODUCT NAME>which will provide you with access to the reseller portal to then start creating new customers
	+ Channel Partner training (covered further in next section)

Service Establishment takes a period of <TIME PERIOD> from the point in time when <COMPANY NAME> has received <LIST DOCUMENTATION>>>>>>>>. It is essential therefore for all customers to complete this process early in the lifecycle of taking <PRODUCT NAME>to their market/customers so that it does not create a delay in delivering an end customer service, since <COMPANY NAME> cannot accept any orders from the CP until such time as they have been fully service established.

# **TRAINING SECTION MAY REQUIRE AMENDING TO FIT CUSTOMER PRACTICE**

## Channel Partner mandatory training overview

These training courses are mandatory:

1. **<PRODUCT NAME> product training**

A 2 hour webinar which provides a comprehensive demonstration and walk through of all of the <PRODUCT NAME>functionality. The course is designed to familiarise new resellers with the portal and features, and enable attendees to learn the basic system operations.

This course should be attended by anyone within the reseller who is going to be involved in the sales, marketing, operations, deployment, in-life management or support of <PRODUCT NAME>.

1. <PRODUCT NAME> **operational processes training**

A 1 hour webinar which provides a walkthrough of the end to end systems and processes which form the end to end service experience for <PRODUCT NAME>. This includes which systems are used to order <PRODUCT NAME>, how to raise incident or queries, etc. The course is design to familiarize new resellers with the consumption and in-life management of <PRODUCT NAME>.

This course should be attended by anyone within the reseller who is going to be involved in the sales, marketing, operations, deployment, in-life management or support of <PRODUCT NAME>.

## Optional training modules

These training courses are available as optional extras for channel partners;

1. **Advanced IVR building course**

A half day course to provide more in-depth training on the use of the IVR builder, and how it can be utilized to create highly sophisticated call routing plans.

This course is optional and can be run for resellers who wish to offer more complex services to their customers. This course can also be provided on behalf of resellers to their end customers, if end customers wish to gain deeper familiarisation and knowledge of the IVR builder, in order to then self-build complex plans.

# MARKETING SUPPORT

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# <PRODUCT NAME>NUMBERING

## Introduction to Numbering; as it relates to <PRODUCT NAME>

There are several types of numbers which relate to <PRODUCT NAME>, and for the sake of clarity each are defined in further detail first before the processes relevant to numbering are explained in this section.

**Service Numbers**

Any active number within <PRODUCT NAME>, is known as a Service Number. Service numbers are chargeable at the prevailing rates on a monthly basis (the rates are available in the <PRODUCT NAME>customer contract in the pricing schedule). Numbers become “active” within <PRODUCT NAME>when a reseller allocates them to an end customers account. There are 2 types of Service Number supported within <PRODUCT NAME>; Geographic and DNIS. The difference between the two is outlined below.

**Service Numbers: Geographic Numbers**

*Geographic numbers are fixed-line telephone numbers that begin with the digits '01' and '02'*

Geographic numbers can either be newly provided by BT as part of the service, or customers can request their existing numbers are ported to the service.

<PRODUCT NAME> supports number import and number export of geographic numbers.

**Non-Geographic Numbers (NGNs)**

*Non-Geographic Numbers (NGNs) are those phone numbers which are not linked to a specific location. They include 03,05, 07, 08, 09, 116 and 118, and are widely used by business, central and local government, charities and statutory bodies for a variety of activities ranging from information and helplines to voting in TV game shows*

NGNs can either be provided by BT as part of the service, or customers can request their existing numbers are ported to the service.

## Ordering new numbers SECTION MAY REQUIRE AMMENDING TO FIT CUSTOMER PRACTICE

Each new reseller will be allocated an initial batch of DNIS numbers to their reseller account as part of the Service establishment process. These numbers can then be used and allocated to end customers as and when the reseller creates and brings on board new clients.

Should the initial pool of numbers run out, the reseller can request additional numbers through the <PRODUCT NAME>Helpdesk by completing a number request. The number request process is covered in greater depth as part of the mandatory training for new resellers.

Should a reseller require a specific new geographic number (for example a number for an end customer who wishes to present a Manchester based DDI) on behalf of an end customer, this can also be requested through the same process.

The standard lead time for new number requests being actioned and implemented is 5 working days.

## Porting numbers

Resellers can port existing geographic and Non-geographic numbers to <PRODUCT NAME>.

Should a reseller wish to port a number to <PRODUCT NAME>, they would complete the porting request form in the <PRODUCT NAME>Helpdesk and submit the port request. Port requests will be accepted by the Helpdesk and the reseller provided within initial acknowledgment of receipt of request. After which further updates will be provided, for example when the port request has been accepted by the porting team and when the confirmed port date has been provided.

Porting of numbers into <PRODUCT NAME> incurs a charge, which is detailed in the Customer Contract, in the pricing Schedule.

Should a port request be rejected because the details of the port request were incorrect, or for any other reason – the reseller will be charged a port rejection charge. If the reseller wishes to the port request can be re-submitted once the details have been updated in response to the port reject reason. Please therefore ensure that port requests are only submitted when you are confident the details are 100% correct.

## Allocating and activating numbers

Numbers allocated to a resellers account are initially non-chargeable. When the reseller allocates a number to a customer account, it becomes activated. Depending on the tariff set up in the resellers account, from that point onwards it will then incur any associated regular service charges as detailed in the pricing Schedule of the Customer Contract.

## Ordering Professional Service

Professional Services (PS) can be provided by <COMPANY NAME> such as:

* **Solution design and consultancy**
We have knowledge experts on designing and deploying complex in network call routing and handling services which are able to provide benefit to end customers. These experts can be requested by resellers to support sales/pre-sales work with end customers if required for example to help with scoping and shaping a requirement, and coming up with a solution design that uses the functionality of <PRODUCT NAME> in order to deliver benefits to the end customer
* **Implementation services**
Those same experts can also be leverage if required by the reseller to support the implementation of the service on behalf of the end customer, for example implementing within the system the complex call plans required by the customer. This could also include project management services during a large implementation where a significant amount of numbers, or number porting is involved which needs a service wrap around it to ensure a smooth customer experience
* **Integration development**
If a customer needs a bespoke integration developed (for example so <PRODUCT NAME>can be used in conjunction with a customers existing platforms/applications) we can (subject to scoping) provide development resource who can complete any agreed work
* **Training**
We can provide additional training for (resellers, and/or to) End Customers (on resellers behalf)

All PS work is subject to scoping so that a quote for time/cost can be provided and agreed upon prior to any work being completed. All PS is charged on prevailing day rates which are set in the channel partner’s contract.

The process for requesting PS is as follows:

* Reseller requests call with their Account Manager or Sales specialist
* A 1 hour scoping call is held to review high level requirements and provide RoM quote
* Subject to the scope of the PS work, after the call it may be possible to proceed with order creation and completion, or further detailed scoping may be required
* If further scoping is required – the reseller will be advised the number of days work expected to complete scoping, and confirmation will be requested that this should be completed and will be chargeable
* Upon completion of further scoping – the reseller will be provided with a SoW and quote for approval prior to commencement of the deliverable
* If further scoping is not required – the reseller will be provided with a SoW and quote for approval prior to commencement of the deliverable

The detailed process for this is covered with new resellers during their on-boarding as part of the mandatory training courses provided by BT Wholesale.

# PRODUCT SUPPORT & FAULT RESOLUTION amend to company specific practice

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**FIRST LINE SUPPORT**

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**SECOND LINE SUPPORT**

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# ACCOUNT MANAGEMENT SUPPORT amend to company specific practice

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# PRICING

The handbook outlines the key chargeable elements associated with the service. Customers should refer to the Contract and in particular the pricing schedules within it for the actual price points associated with the service.

## <PRODUCT NAME> Contract – amend to company specific practice

This pricing schedule contains the core components of the service and is made-up of the following product sets:

* **Professional Services Charges**

Any additional work required by customers which falls outside the scope of the standard <PRODUCT NAME>product will be scoped and agreed in advance of work commencing and charged at a daily rate set out in Part E of the contract. Professional Services charges are payable in arrears upon completion of any agreed work.

* **<PRODUCT NAME>Service Number Charges**Charges associated with active service numbers. These charges are per number, per month, for any service numbers which are active within a resellers account. The relevant charges are outlined in the contract in Part E.
* **<PRODUCT NAME>Feature Charges**Charges associated with the use of certain predefined chargeable features within <PRODUCT NAME>, which include call recording, and call recording transcription. The relevant charges are outlined in the contract in Part E
* **Capacity Charges**Each active service number is restricted to a maximum of 50 calls. Should a customer require greater levels of call capacity on any given service number, this can be requested and is chargeable. The relevant charges are outlined in the contract in Part E.
* **Number Porting Charges**Any number porting requests are chargeable. Port requests which are rejected are also chargeable. The relevant charges are outlined in the contract in Part E.
* **Major Call Types (Off Net)** – This covers the major call types including calls made to; Geographic numbers (national/local) and Mobile numbers.
* **Minor Call Types (Off Net)** – This covers the minor call types including calls made to; Operator Services, 0844, 0871, 0845, 0870, , other mobile numbers not covered in major call types
* **International calls** – this covers all supported international call destinations where <PRODUCT NAME> can carry to calls to. Note that this is not a complete list of all geographic locations as <PRODUCT NAME>restricts outbound to certain destination where known fraudulent activity is frequent

## Price Changes amend to company specific practice

All notifications of price updates for Part E and B are sent via the <PRODUCT NAME>reseller portal.

<PRODUCT NAME>reserves the right to change pricing providing 28 days’ notice is provided. The normal frequency of pricing changes is explained below.

* Services: prices are only expected to change annually with 28 days’ notice provided. New product introductions may see prices provided on less than 28 days to ensure customers have access to services the moment we release them.
* Calls: mobile Carriers change their pricing on a quarterly basis so <PRODUCT NAME>will reflect these changes as they happen and will provide 28 days’ notice. International destinations pricing changes monthly, <PRODUCT NAME>provides 28 days’ notice of these changes.

# BILLING

Customers should refer to the <PRODUCT NAME> Billing Guides and supporting documentation, which will be provided by <JOB TITLE>.

## Credit Vetting amend to company specific practice

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## Billing Reports amend to company specific practice

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# SERVICE EXCEPTIONS

## Concurrent calls capacity

The <COMPANY NAME> <PRODUCT NAME> platform and service has been designed and dimensioned to support fair usage by all customers with regards to concurrent voice channels.

<COMPANY NAME> manage the platform capacity globally based on the volume of Service Numbers and forecasts provided by Customers to ensure that contention of capacity does not impact service performance, but at times of exceptional call volumes, customers may experience restrained capacity due to platform/network wide congestion.

If a Customer needs dedicated capacity due to the nature of their business, this can be requested from <COMPANY NAME> on a bespoke basis, but may be chargeable at different rates

## General Exceptions

* It is the customer’s responsibility to ensure they read all user guides and documentation on the <PRODUCT NAME> Service.
* <COMPANY NAME> will not be responsible for any incorrect set-ups as a result of customers not following the correct process and/or having not been appropriately trained.
* The Customer acknowledges that it is their responsibility to ensure compliance with the requirements of the Telephone Preference Service by themselves, Resellers and End Users. <COMPANY NAME> shall be in no way responsible for such compliance.

# SERVICE CESSATIONS

Customers can cease their entire <PRODUCT NAME> contract by serving notice at the end of their minimum term in accordance with the terms and conditions set out in the contract

# COMPLAINTS HANDLING

For details on complaint handling please refer to <DOCUMENT NAME or URL> which is available from <JOB TITLE>.

# RELATED DOCUMENTATION

The <PRODUCT NAME>product handbook is designed to give channel partners a comprehensive overview of the entire <PRODUCT NAME>solution, however it is not exhaustive and other documents exist which go into greater detail on certain topics. The following list are a selection of other documents which may be referenced from within this handbook and are available as part of the <PRODUCT NAME>service from <COMPANY NAME> for customers.

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Documents are made available online via <URL> or from <NAME><JOB TITLE> on request.