

RingCentral Training Services: RingCentral Contact Center™ Introduction to Custom Reports

Gain insight into your call center with custom reports.



Training overview

RingCentral Contact Center reporting allows you to build and generate custom reports to provide you with powerful analytics. This course is designed to provide valuable insight into how to design four commonly used reports and how they can be used to improve your call center performance. The course is delivered by a live instructor and is specifically designed

for professionals responsible for supporting contact center performance management, reporting, contact center operations, or implementation of performance improvement strategies.

A student in this class will learn how to create custom reports within RingCentral Contact Center to identify performance issues and address problems in key areas of the contact center.

Course objectives

- Create report headers for custom reports.
- Manage categories of custom reports.
- Incorporate custom reporting scenarios into your internal reporting structure.
- Build and maintain report schedules that align with your internal reporting cadence.

RingCentral Contact Center Introduction to Custom Reports—Scope of Training

Cost	\$800
Training delivery	Virtual instructor-led training (VILT)
Duration	2 hours
Level	Intermediate
Who should attend	Individuals who are responsible for generating reporting metrics for key stakeholders or managing the performance of the contact center including contact center administrators, performance analysts, and operations managers

Agenda

- Refresher to Introduction to Reporting
 - Refresh rates and data sources
 - Dashboard
 - Canned reports
 - Custom reports
 - Data download
- How to create custom reports
 - Creating categories
 - Creating headers
 - Creating report templates
 - Existing
 - Create new
 - Create form
 - Required information
 - Fields
 - Filters
 - Field groups
 - Metric groups
- Scenario 1: The Comprehensive Agent Report
- Scenario 2: The Skill Performance Report
- Scenario 3: Transfers and Avoidance Report
- Scenario 4: Dispositions Report
- Optional scenario: IVR press path
- Optional scenario: Personal connection
- Overview of RingCentral Support and resources
 - RingCentral University

Course prerequisites:

- Must have completed RingCentral Contact Center Introduction to Reporting.
- System must be active and has gone live.

For more information, please contact a sales representative. Visit ringcentral.com or call 855-774-2510.

RingCentral, Inc. (NYSE: RNG) is a leading provider of global enterprise cloud communications, collaboration, and contact center solutions. More flexible and cost-effective than legacy on-premises systems, RingCentral empowers modern mobile and distributed workforces to communicate, collaborate, and connect from any location, on any device, and via any mode. RingCentral provides unified voice, video meetings, team messaging, digital customer engagement, and integrated contact center solutions for enterprises globally. RingCentral's open platform integrates with leading business apps and enables customers to easily customize business workflows. RingCentral is headquartered in Belmont, California, and has offices around the world.