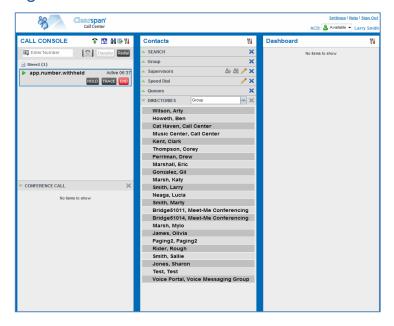
# HOSTED THIN CALL CENTER

# **Agent Tasks**



### Call Center Interface

The following elements are available from the Call Center main interface:

- Global Message Area This is located to the right of the Call Center name. It displays messages to the user.
- Call Console This is located on the left-hand side of the Call Center main page. It allows you to manage current calls.
   The main area of the Call Console displays your current calls and allows you to take actions on them.

In addition, the Call Console contains the following panels:

- Dialer This is where you dial ad hoc numbers.
- Conference Call This is where you manage conference calls.
- Contacts pane This is the middle pane of the Call Center main page. It allows you to make calls to contacts and manage contact directories. It contains the following areas:
  - Contact Directories panels You use these to access and manage your contacts.
  - Search panel You use this to search for contacts.
  - Directories panel This consolidates contacts from several directories.
- Dashboard Pane This is located on the right-hand side of the Call Center main page. It allows you to monitor selected call centers to which you are assigned as an agent.
- Links to other windows:
  - Reporting This provides access to Call Center Reporting.
  - Settings This provides access to client configuration pages.
  - Help When clicked, this opens the Clearspan Hosted Thin Call Center – Agent/Supervisor User Guide.
  - Sign-Out When clicked, this signs you out of the call center and allows you to save your workspace.

# Agent Automatic Call Distribution (ACD) States

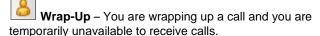
Your ACD state can be one of the following:



Available - You are available to receive calls.



Unavailable - You are not available to receive calls.



# Configure Your Post Sign-In ACD State

- 1. On the main page, click the **Settings** link.
- 2. On the Settings page, click the Application tab.
- 3. Set your Post Sign-In ACD State and Post Call ACD State.
- If you set Post Call ACD State to "Unavailable", you may have to select a code that explains the reason for your unavailability.
- If you set your Post Call ACD State to "Wrap-Up", check the Set Wrap-Up timer to box and then select the length of time before your state changes to Available upon the completion of a call.

## Change Your ACD State and Set Unavailable Code

 At the top right-hand side of the main window, click ACD states and then select your new state from the drop-down list.



 If the Unavailable Codes feature is enabled and you select Unavailable as your ACD state, a list of codes to choose from appears. Select the code that best describes the reason for your unavailability.

# Select Your Outgoing Call Identity

1. In the *Dialer*, click **Outbound CLID** 



From the drop-down list, select the phone number to display when you are making a call.

### View Incoming Call Details

If the Notification feature is enabled, a notification window appears on top of the system tray when you receive a call, displaying the name and number of the caller.

For calls from queues, it displays:

- Calling name and number on which the call was received
- Call center or DNIS name
- Wait time of the call
- Number of calls in queue



#### Open URL

You can open a Uniform Resource Locator (URL) page in your browser to obtain more information about an incoming or any current call. This page contains information about the calling party encoded in its URL.

In the Call Notification pop-up window that appears when you receive a call or in the Call Console for the target call, click **Web** 



#### Save vCard

When Outlook is running, you can save the caller's phone number and personal information as a vCard in Outlook.

In the Call Notification pop-up window that appears when you

receive a call, click Add vCard



# Dial Ad Hoc Number

In the Dialer, enter the number to call and click Dial



#### Call Contact

- In the Contacts pane, click the contact to call and then click CALL for that contact.
- To dial the contact's extension, click EXT or click MOB to dial the contact's mobile number.

#### Redial Number

Up to 10 previously dialed numbers are available. In the Dialer, click the Redial button and then select a number from the list.

# Dial from Call History



- In the Call Console, click Call History 1.
- 2. In the Call History dialog box, select Missed Calls, Received Calls, or Placed Calls.
- Click a call log to expand it and then click Call for that log.

#### Dial from Search

- Perform a search using the Search feature.
- Click the target contact and then click Call for that contact.

#### Answer Call

Calls can be answered automatically or manually.

## To answer calls automatically:



In the Call Console, click Auto Answer

Note that this feature works only if your device is Advanced Call Control (ACC)-compliant. In addition, if Auto Answer is enabled on the server, you must not enable Auto Answer in the client.

#### To answer a call manually:

Move the mouse over an incoming call and click ANS.

### Blind Transfer Call

Calls can be blind transferred while active, held, or ringing (in).

- To transfer the call to an ad hoc number, enter the number in the Dialer and then click Transfer.
- To transfer the call to a contact, click a contact in one of the contact's directories and then click TXR for that contact.

## Transfer Call with Consultation

Calls can be transferred while active, held, or ringing (in).

- Dial the number or contact to transfer the call over to.
- When the call is answered, speak to the party.
- From the Call Console, select the original call.
- Move the mouse over the new call and click TXR.

#### Transfer to Queue

- From the Call Console, select the call to transfer.
- In the Contacts pane, expand the Queues panel. 2.
- Click a gueue to expand it and then click **TXR** for that gueue.

## Hold Call

This function is not available from a remote office. In the Call Console, click HOLD for an active call.

### Resume Call

This function is not available from a remote office. In the Call Console, click ANS for a held call.

# End Call

In the Call Console, move the mouse over a call and click



# Generate Call Trace

### To generate a call trace for a current call:

In the Call Console, move the mouse over a call and click TRACE for that call. A call trace notification is generated, containing the name and address of the parties, the time stamp of the call, the call ID, and the system ID.

# To generate a call trace for the last released call:

In the Call Console header, click Trace



# Tag ACD Call with Disposition Codes

More than one disposition code can be assigned to a call.

## To assign disposition codes to a current call:

- In the Call Console, click the call.
- 2. From the list that appears, select a disposition code. The code is applied to the call and sent to the server.

## To assign disposition codes in Wrap-Up:

- When in Wrap-Up, click Disposition Code Console header.
- 2. From the drop-down list that appears, select a code. The code is applied to the last released call.

## Start Three-Way Conference

- In the Call Console, select one of the two calls to conference.
- Move the mouse over the second, non-selected call and click CONF. The calls are moved to the Conference Call panel.

# Add Participant to Conference

In the Call Console, move the mouse over a call and click CONF.

#### Hold or Resume Conference

- To hold a conference, click HOLD in the Conference Call panel header. The other parties continue their conversation.
- To resume a held conference, click ANS.

#### Leave Conference

You can only leave a Three-Way conference.

In the Conference Call panel, click LEAVE. The other parties continue their conversation and the calls are removed from the Conference Call panel.

### **Drop Call from Conference**

In the Conference Call panel, select a call and then click



## Hold Conference Participant

In the Conference Call panel, move the mouse over the target call and then click HOLD.

# Resume Conference Participant

In the *Conference Call* panel, move the mouse over the target call and then click **ANS**.

### **End Conference**

In the Conference Call panel header, click END. All calls are released.

## Monitor Supervisor Phone State

When escalating a call or making an emergency call, it is useful to know which supervisors are available to take calls.

1. In the Supervisors panel, click **Edit** 



- In the dialog box that appears, select the supervisors to monitor
- Click Save. The selected supervisors have their phone state displayed.

# **Phone States**

The possible contact phone states are Available, On a Call, Ringing, Do Not Disturb, Private,

Forwarding, and Unknown.

# Make Emergency Call to Supervisor

While on a call, click **Emergency** in the *Supervisors* panel to let the system select a supervisor, or click an available supervisor and then click **EMER** for that supervisor.

# Blind Escalate Call to Supervisor:

- While on a call, click Escalate in the Supervisors panel
  to let the system select a supervisor, or click an available
  supervisor and then click ESC for that supervisor. The new
  call appears in the Call Console.
- 2. In the Call Console, select the original call.
- Without waiting for the supervisor to answer, move the mouse over the call to the supervisor and then click TXR.

## **Escalate Call with Consultation**

- While on a call, click Escalate in the Supervisors panel to let the system select a supervisor, or click an available supervisor and then click ESC for that supervisor.
- 2. When the call is answered, consult with the supervisor.
- 3. In the Call Console, select the original call.
- 4. Move the mouse over the new call and then click **TXR**.

### Escalate Call with Conference or Hand Over

- 1. While on a call, click **Escalate** in the *Supervisors* panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor.
- 2. When the call is answered, consult with the supervisor.
- 3. In the Call Console, select the original call.
- Move the mouse over the call to the supervisor and click CONF. The call appears in the Call Console panel.

 To hand over the call to the supervisor, click LEAVE in the Conference Call panel. The customer and the supervisor continue their conversation.

# Escalate Call with Mid-Conference Hold

- 1. While on a call, click **Escalate** in the *Supervisors* panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor.
- 2. When the call is answered, consult with the supervisor.
- 3. In the Call Console, select the original call.
- Move the mouse over the call to the supervisor and then click CONF.
- 5. To put the conference on hold, click **HOLD** in the *Conference Call* panel header. The other parties continue their conversation and the calls stay in the *Conference Call* panel.

# Camp on Busy Contact

- 1. In the Call Console, select the call to camp on.
- 2. In the *Agents* or *Supervisors* directory, move the mouse over a busy or ringing contact and then click **CAMP**. The call is camped and removed from the *Call Console*.
- 3. If the call timer expires before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

## Sent E-mail to Contact

- Expand the Group/Enterprise or Favorites tab, click a contact with e-mail, and then click EMAIL.
- In the message window that appears, enter the required information and then click **Send.**

#### Record Call

To record selected calls in Call Center, your Call Recording service has to be set to "On Demand" via the web portal.

In the Call Console, select the call to record and click Record.

# **Display Call History**

Call History displays your placed, received, and missed calls.

In the Call Console, click Call History



To view call logs in a group, select the group from the Show drop-down list.

# **Delete Call History**

1. In the Call Console, click Call History



2. To delete a specific call log, select the call log to delete in the

Call History dialog box and then click **Delete** 

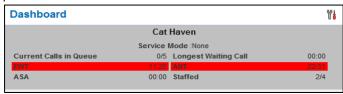


To delete all call logs, click Delete All.

#### Monitor Call Centers

- In the Dashboard pane, click Options and select the Select Queues option. The Select Queues dialog box appears.
- Check the call centers you want to monitor and click Save.
- 3. Click **Options** again and click *Select Visible Fields*.

- In the Select Fields dialog box, check Select All to display all performance indicators. Or to show or hide some performance indicators, check or uncheck the corresponding check boxes.
- Click Save. The Dashboard displays the selected performance indicators for the selected call centers.



Your administrator can set yellow and red thresholds for some of the measurements. When a threshold is crossed, the measurement is displayed in the color corresponding to the crossed threshold. Red thresholds have higher severity that yellow thresholds. The fields that provide visual indicators are *Calls in Queue, Longest Waiting Time, EWT, AHT*, and *ASA*.

## **Show or Hide Contacts**

- At the top of the Contacts pane, click Options View and then Directories. Then check the directories you want visible and deselect the directories to hide.
- To show or hide directory contents, click Expand Collapse in the directory panel for that directory.
- To display a directory in the *Directories* panel, select the directory from the drop-down list. To display all directories, select *Show all*.
- 4. To display a directory below the *Call Console*, select *Show All* in the *Directories* panel and click the **Pullout Directory** button for the target directory.

# Search for Contacts

- In the Search panel, select the directories to search from the drop-down list.
- To restrict the search to contacts that start with the text to search for, check the *Begins with* box.
- In the Search text box, enter the text to search for and press ENTER. You can enter partial information, such as part of a name or number. The text is matched against all attributes and the search results are displayed in the Search panel.
- 4. To clear the search results, click **Reset**



Note that the search is not case-sensitive.

# Manage Speed Dial and Personal Directories

- 1. In the Speed Dial or Personal panel, click Edit . The Edit Speed Dials/Edit Personal Contacts dialog box appears.
- 2. To add an entry, click **Add**. A new row appears.
  - For a Speed Dial entry, select the dial code and enter the number and description of the contact.
  - For a Personal entry, enter the name and number.
- 3. To delete an entry, select the entry, and click **Delete**.
- 4. To modify a *Speed Dial* entry, double-click the entry so that it can be edited and modify the information as required.

Note that you cannot modify a Personal entry.

## View and Change Security Classification of Calls

If you have the Security Classification service, you can view the security classification of your calls and change your current security classification in the *Call Console*.

- 1. To change your security classification, select a classification level from the *Security Classification* drop-down list.
- 2. The security classification of your current calls is recalculated.

# **Instant Messaging**

If you have an IM&P service assigned on Clearspan you can chat with your IM&P contacts and monitor the state of selected contacts.

### Monitor IM&P Contacts

To monitor their state, you need to first subscribe to the contact.

- 1. In the *Instant Message* panel, click **Edit** . The *Edit Instant Message Contacts* dialog box appears.
- Click Add and enter the name and a valid IM&P ID of the contact in the new row. A subscription request is sent.

Alternatively, click the state icon of an unsubscribed contact



- Click the **Presence** box at the top right-hand side of the main window and select your new state from the drop-down list.
- 2. Click **Edit** next to the *Presence* box and enter a message to display to other IM&P users in the dialog box that appears.

#### IM&P States

The possible states are Available , Busy , Away , and Offline . In addition, the following states are displayed in some directories for IM&P users you are not monitoring: Not Subscribed and Pending Subscription .

# Accept IM&P Subscription Request

When you receive a request from another user, click **Yes** in the dialog box that appears to accept the request. The contact is added to the *Instant Message* directory, if it is not yet there.

## **Chat with Contact**

- To chat with an IM&P contact, click the Chat button for the contact. A chat window appears.
- 2. Enter your message in the text box at the bottom of the window and press ENTER.

You can have more than one chat window open. You can also accept chat requests from contacts.

### Create a Multi-User Chat

- Click the Add button in a Chat window. A drop-down list of available contacts appears.
- 2. Check the box next to each contact to invite to the chat and click the **Invite** button.
- 3. To leave a chat, close the dialog box.

# **Supervisor Tasks**



# **Monitor Agents**

You monitor agents using the *Agents* panel located in the *Contacts* pane. This shows the real-time state of the agents who you supervise and it allows you to change the state of an agent.

To select agents to monitor:





Unavailable

Wrap-Up

- 2. In the dialog box that appears, check the agents to monitor.
- 3. Click Save.

The selected agents have their combined phone and ACD state displayed as follows:

Available, Busy,
Unavailable, or Sign-Out, Ringing or Wrap-Up, Do

Not Disturb, Private, and Forwarding. Agents who are not monitored have their state set to Unknown.

## Change Agent's ACD State

1. In the *Agents* panel, click the agent and then click the **ACD** button for that agent.

- From the drop-down list, select the new state.
- If you selected *Unavailable*, you may also have to select an unavailability code.

# View Agent Details

Clicking an agent expands the entry displaying all queues the agent is staffing, with the agent's join-in state in each queue and skill level in queues with skill-based routing; as well as the current calls, in order of arrival.

## Make Agent Join/Leave Queue

- 1. In the Agents panel, click the target agent.
- Click the Queue button. The Agent Queue Membership dialog box appears.
- Check or uncheck the *Join* box in the row of the queue you want the agent to joint or leave and click **Save**.

## Pick up Agent's Call

- 1. In the *Agents* panel, click an agent in the *Ringing* state.
- 2. Click **ANS**. The call appears in the *Call Console*.

# Silently Monitor Agent's Current Call

The agent to monitor must have exactly one active call.

- 1. In the *Contacts* pane, expand the *Agents* panel.
- Click the agent and then click SM for the selected agent.
   A new call is created in the Conference Call panel. You are conferenced in to the call and muted.

# Silently Monitor Agent's Next Call

In the *Agents* panel, click the target agent and then click **SMN**. When the next call is received and answered by the agent, you are conferenced in to the call and your call is muted.

# Monitor Call Center's Next Call (Premium Call Center)

- 1. In the *Contacts* pane, expand the *Queues* panel and click the target call center to expand it.
- Click the SMN for that call center. A monitoring call is established for the selected call center.

When the next call is received and answered by an agent, you are conferenced in to the call and your call is muted.

# **Un-mute Silently Monitored Call**

While silently listening on a call, click **BARGE** in the *Conference Call* panel. You can now participate in the conversation.

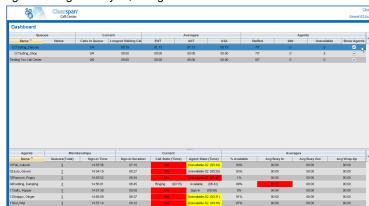
# Barge In on Agent's Call

The agent must have exactly one active call.

- 1. In the Contacts pane, expand the Agents panel.
- Click the target agent and then click BARGE for that agent. You are conferenced in to the call.
- To leave the conference, click LEAVE in the Conference Call panel.

## View Agents and Queues Statistics

You can view real-time statistics for the monitored call centers and agents assigned to you, using the *Dashboard* window.



- The Queue Summary shows key performance indicators for each call center you manage.
- The Agent Summary shows key performance indicators for the supervised team of agents.

Note that by default, agent statistics are not displayed.

#### To display agent statistics for a call center:

- 1. In the *Queue Summary*, check the *Show Agents* box in the row for that call center.
- 2. To hide signed-out agents, check the *Hide Signed Out Agents* box at the top-right corner of the *Dashboard*.

The administrator can set yellow and red thresholds for some of the measurements. When a threshold is crossed, the measurement is displayed in the color corresponding to the crossed threshold. Red thresholds have higher severity than yellow thresholds.

- Queue fields for which thresholds can be set are Calls in Queue, Longest Waiting Time, EWT, AHT, and ASA.
- Agent fields for which thresholds can be set are Call State (Time) – On Call, Call State (Time) – Idle, Agent State (Time) – Unavailable, Avg Busy In, Avg Busy Out, and Avg Wrap-Up.

# Navigate from Dashboard to Agent or Queue

In the *Dashboard*, click the link for the agent or queue. The main window is brought to the foreground and the selected agent is displayed and expanded in the *Agents* panel. If you clicked a queue, the queue is displayed and expanded in the *Queued Calls* pane listing calls in the queue.

#### Monitor Queues

The *Queued Calls* pane shows selected call centers that you are managing. Each call center is displayed in a separate panel.

#### To select call centers to monitor:

- At the top right-hand side of the Queued Calls pane, click
   Options and select Edit Queue Favorite Dialog from the menu.
- In the dialog box that appears, check the call centers to display
- 3. Click **Save**. The selected call centers appear in the *Queued Calls* pane.

The following information is displayed for each call center:

- Call center name and phone number
- Service Mode icon/button
- Message Waiting icon (if there are new messages)
- Ratio of queued calls to call center's call capacity

The Service Mode icon displays the call center mode, which can be Normal, Night Service, Night Service Override, Forced Forward, and Holiday Service.

You expand a call center panel by clicking the **Expand** button for that panel. When expanded, the calls queued on that call center appear.

For each call, the following information is displayed:

- Call Status icon, which can be:
  - Call is waiting to be answered.
  - Message is being played to caller.
  - Call was reordered.
  - Call was bounced.

- Name/number of the call center (or DNIS, if applicable) that was called
- Total call time, and in parentheses, the time in the current queue (when applicable)

Clicking a call expands the call to show additional data:

- Call priority bucket (Premium call center)
- Call position in queue
- Name
- Phone number of the calling party (if available)

# **Enable Night Service Override or Forced Forwarding**

- In the Queued Calls pane, click the Service Mode Call Center panel.
- 2. In the *Edit Queue Favorites* dialog box that appears, check *Night Service Override* or *Forced Forwarding* for each call center for which you want to enable the service(s).
- For Forced Forwarding, enter the forwarding destination.
   Note that Forced Forwarding has precedence over Night Service Override.

## Promote Call in Queue (Premium Call Center)

- 1. In the Queued Calls pane, expand a Call Center panel.
- Click the call to promote and then click **PROMOTE**. The queued call is moved to the end of the next highest priority bucket.

## Position Call in Queue

- 1. In the Queued Calls pane, expand a Call Center panel.
- 2. Click the target call and then click **REORDER** for that call.
- 3. From the drop-down list that appears, select a new position. The call is placed at the new position in the queue.

Note that you cannot place a call ahead of a bounced call.

### Transfer Call to Top of Queue

- 1. In the Queued Calls pane, expand a Call Center panel.
- 2. Click the target call and then click **REORDER** for that call.
- 3. From the drop-down list that appears, select *Send to Front*.

# Retrieve Call from Queue

- 1. In the Queued Calls pane, expand a Call Center panel.
- 2. Click the target call and then click **RETRIEVE**. The call appears in the *Call Console* and you treat it as any other call.

### Transfer Call from Queue to Agent

- 1. In the Queued Calls pane, select the call to transfer.
- 2. In the *Contacts* pane, expand the *Agents* panel.
- 3. Click the target agent and then click **TXR** for that agent.

# Transfer Call from Queue to Ad-Hoc Number

- 1. In the Queued Calls pane, select the call to transfer.
- 2. In the *Dialer*, enter the number and click **Transfer**.

#### Transfer Call between Queues

- 1. In the Queued Calls pane, select the call to transfer.
- 2. In the *Contacts* pane, expand the *Queues* panel.
- 3. Click the target queue and then click **TXR** for that queue.

# Reporting

Call Center provides a set of reports about call centers and agents' performance. Additional reports may be defined by your system administrator. Since reports are configurable, the reports available to you depend on your system configuration. For information, consult your administrator.

Note that agents can only request reports about themselves.

## Run Report

- 1. On the Call Center main page, click the Reporting link.
- 2. In the Report window, select the report type you want.
- 3. In the dialog box that appears, enter the required information.
- 4. Click **Run Report**. The report appears in the *Report* window.

# Schedule Report

- 1. On the *Call Center* main page, click the **Reporting** link.
- 2. In the Report window, select the report type you want.
- 3. In the dialog box that appears, enter required information:
  - a. For Type, select Scheduled.
  - b. Provide the name and the description of the report.
  - Specify the recurrence pattern of the report and the report time frame.
  - d. Enter the e-mail addresses of the recipients of the report.
  - e. Enter the remaining parameters.
- Click Schedule Report. The report is scheduled. It will run at the specified times and will be sent to the recipients configured in the report schedule.

## Manage Scheduled Reports

- 1. On the *Call Center* main page, click the **Reporting** link.
- From the drop-down list, select Scheduled Reports. A Scheduled Reports dialog box appears, listing the reports that you have scheduled.
- To edit a report, click Load in the row for the report and modify the report as required.
- 4. To delete a report, click **Delete** in the row



 $^{lacktrel{L}}$  in the row for the report.

# **Keyboard Shortcuts**

When using keyboard shortcuts, make sure that the main interface window is in focus.

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Key	Equivalent Mouse Action
ESC	Click the <b>Close</b> button in a dialog box.
ESC	Cancel the changes.
/	Click the <i>Dialer</i> text box.
?	Click the Search text box.
ARROW DOWN	Click the scroll bar or the next item on a list.
ARROW UP	Click the scroll bar or the previous item on a list.
PAGE DOWN	Scroll down one page.
PAGE UP	Scroll up one page.
19	Select a call in the Call Console.
SPACEBAR	Click <b>Answer</b> on the selected incoming call in the <i>Call Console</i> .
<period></period>	Click <b>End</b> on the selected call in the <i>Call Console</i> .
ENTER	Click Dial.
ENTER	Click Search.
+	Click <b>Transfer</b> in the <i>Dialer</i> .
SHIFT+19	Select a ringing call and click <b>Answer</b> .
SHIFT+19	Select an active call and click <b>Hold</b> .
SHIFT+19	Select a held call and click <b>Retrieve</b> .
Sors	Click the <b>Settings</b> link.
B or b	Click the Back to Application link.
Rorr	Click the <b>Call History</b> button.
H or h	Click the <b>Help</b> link.
D or d	Click the <b>Dashboard</b> link (Supervisor)
SHIFT+L or SHIFT+I	Click the <b>Sign Out</b> link.
SHIFT+A	Select Available (Agent).
SHIFT+U	Select Unavailable (Agent).
SHIFT+W	Select Wrap-Up (Agent).