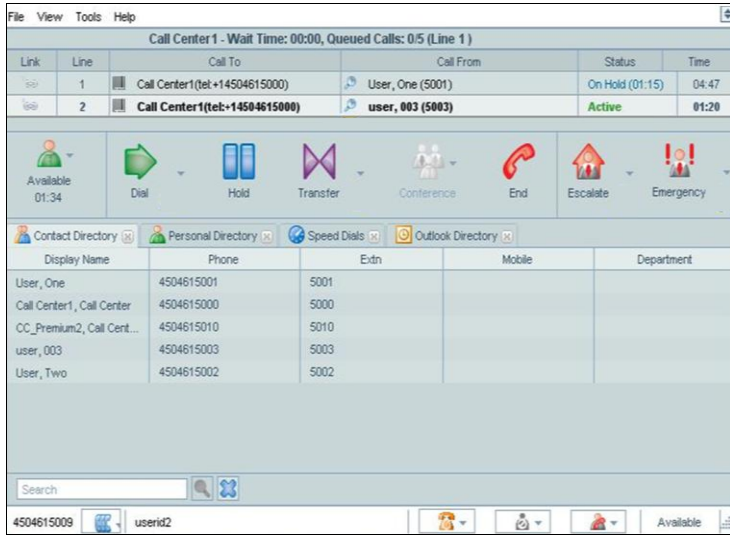


# CALL CENTER AGENTS

## Agent Tasks



### Call Center Interface

The following elements are available from the Call Center interface:

- **Menu bar** – Located at the top, it allows you to set up your preferences for using the Call Center.
- **Global Message Area** – Located below the Menu bar, displays the last incoming call from a Premium call center.
- **Switchboard** – Located below the Global Message Area, allows you to manage current calls.
- **ACD/Control panel** – Located below the Switchboard, allows you to:
  - Modify your availability state (*Availability* combo-button including Available, Unavailable, and Wrap-Up states)
  - Manage calls (Dial, Trace, Answer/Hold, Transfer, Conference, End, Escalate, and Emergency buttons)
- **Content panel** – Is where directories appear.
- **Status bar** – Located at the bottom of the main interface, displays your phone number (if available), Outbound DNIS button, your user ID, your status for Do Not Disturb, Call Waiting, Auto Answer (if enabled), and your current availability to take calls.

### Agent 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.
- Wrap-Up** – You are wrapping-up a call and temporarily unavailable to receive calls.

### Configure Your ACD State

You can set your sign in and post call ACD availability state.

1. On the *Menu* bar, click **Tools** and then **Options**.
2. Click the **Agent** tab.
3. Set the *Agent post sign-in ACD state* to “Available” or “Unavailable”.
4. Set your *Agent post call ACD state* to “Wrap-Up”, “Available”, or “Unavailable”.
5. If you set the *Agent post sign-in ACD state* or *Agent post call ACD state* to “Unavailable”, select an unavailable code.
6. If you set your post call state to “Wrap-Up”, select the *Agent timed Wrap-Up* box and select the length of time before your status changes to “Available” upon the completion of a call.

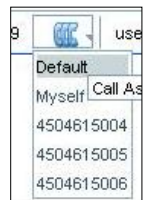
### Change Your ACD State and Set Unavailable Code

1. To change your availability state, click the **Availability** button and select your new state from the drop-down list (Available, Unavailable, or Wrap-Up).
2. 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. On the *Status* bar, click the **Call As** button.
2. Select the phone number to display when you are making a call from the list.
3. To call as yourself, select *Myself*.
4. To reset the default number, select *Default*.



### Dial from Directory

1. In the *Content* panel, select the target directory.
2. Click the phone number you want to call.

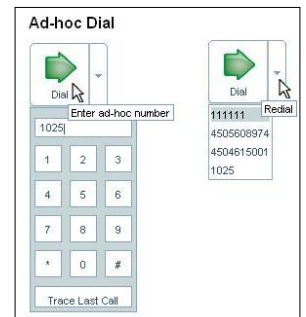
### Dial Ad Hoc Number

1. Click **Dial**
2. Select the number from the dial pad.

### Redial Number

Up to 10 previously dialed numbers are available.

1. Click the right **Dial** button.
2. From the list, select the number you want to call.



## Dial from Search

1. In the *Content* panel, select the target directory.
2. In the *Search* box, type your search criteria.



3. Press **Enter**.
4. Click the phone number you want to dial.

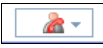
## Dial from Call History

1. From the *Menu* bar, select *Tools – Call History*.
2. Select the call history you want (*Dialed Calls*, *Received Calls*, or *Missed Calls*).
3. Click the phone number you want to call.

## Answer Call

Calls can be answered automatically or manually.

### To answer calls automatically:

- From the *Status* bar, select  and check *Auto Answer*. The manual mode appears.

**NOTE:** This feature works only if your device is Advanced Call Control (ACC)-compliant.

### To answer a call manually:

1. On the *Switchboard*, select an incoming call.
2. Click **Answer**.

## View Incoming Call Details

When you receive a call, a notification window pops up on top of the system tray displaying the name and number of the caller.

In addition, for Premium queues, it displays:

- Name of the ACD queue
- DNIS name and number
- Wait Time of the call
- Number of calls still in queue (Queued Calls)



## Blind Transfer Call

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

1. On the *Switchboard*, select the call to transfer.
2. Dial or select the number to call. The first call is put on hold.
3. Before the second call is answered, select both calls on switchboard and click **Transfer**.

## Transfer Call with Consultation

Calls can be transferred with consultation while active, held, or ringing (in) on your phone.

1. On the *Switchboard*, select the call to transfer.
2. Dial or select the number to call. The first call is put on hold.
3. When the second call is answered, speak to the party.
4. Select both calls on the switchboard and click **Transfer**.

## Transfer to Queue

- While on a call, click **Transfer** and select the destination queue from the list.

## Transfer to Ad-hoc Number

- While on a call, click the right **Transfer** button and enter the number using the number pad.

## Hold Call

This function is not available from a remote office.

1. From the *Switchboard*, select an active call.
2. Click **Hold**.

## Unhold Call

This function is not available from a remote office.


1. From the *Switchboard*, select a held call.
2. Click **Unhold**.

## End Call

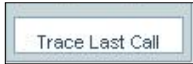
1. From the *Switchboard*, select the call to end.
2. Click **End**.

## Generate Call Trace

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


1. Select an active, held, or conference call on the switchboard.
2. Click the **Trace**  icon. A call trace notification is generated, containing the name and address of the parties, the timestamp of the call, the call ID, and the system ID.

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

Click **Dial** and then click **Trace Last Call**  at the bottom of the *Dial Pad*, to generate a trace for the last ended call.

## Tag Call with Disposition Codes

### To assign disposition codes to a current call:

1. Select a call on the *Switchboard*.
2. Click the Disposition Code  icon in the row for the call and select a disposition code from the drop-down list. The code is applied to the call and sent to the server.

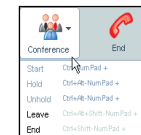
### To assign disposition codes when you are in the Wrap-Up state:

Click the right-side of the Wrap-Up button and select one or more disposition codes from the drop-down list. The codes are applied to the last released call.



## Start Conference

On the *Switchboard*, click the **Link** column of the calls to conference and click **Conference**. Alternatively, while on a call, dial a number or select a contact; then click **Conference** and select **Start** from the list.



## Hold Conference

To hold a conference, click **Conference** and select **Hold**. The other parties can continue their conversation.

## Unhold Conference

To unhold a held conference, click **Conference** and select **Unhold**.

## Leave Conference

To leave a conference, click **Conference** and select **Leave**.

## Drop Call from Conference

On the *Switchboard*, select the call you want to drop and click **End**.

## End Conference

To end a conference, click **Conference** and select *End* from the list.

## Blind Escalate Call



To blind escalate a call to a supervisor:

1. While on the call, click **Escalate** to let the system automatically select a supervisor, or click right **Escalate** and select the supervisor's name from the list.
2. Click **Transfer**, before the call is answered.

## Escalate Call with Conference

To conference a supervisor into a conference:

1. While on the call, click **Escalate** to let the system automatically select a supervisor, or click right **Escalate** and select the name of a supervisor from the list.
2. When the call is answered, consult with the supervisor.
3. Click **Conference** and select *Start* from the list.
4. To leave the conference, click **Conference** and select *Leave*.

## Escalate Call with Consultation

1. While on a call, click **Escalate** to let the system automatically select a supervisor, or click right **Escalate** and select the supervisor's name from the list.
2. When the call is answered, consult with the supervisor.
3. Click **Transfer**.

## Escalate Call with Hand Over

Use this method to escalate a call to a supervisor through a conference call and then leave the call.

1. While on the call, click **Escalate** to let the system automatically select a supervisor, or click right **Escalate** and select the name of a supervisor from the list.
2. When the call is answered, consult with the supervisor.
3. Click **Conference** and select *Start* from the list.
4. When the conference is established, click **Conference** and select *Leave*.

## Escalate Call with Individual Mid-Conference Hold

1. While on the call, click **Escalate** to let the system automatically select a supervisor, or click right **Escalate** and select the name of a supervisor from the list.
2. When the call is answered, consult with the supervisor.
3. Click **Conference** and select *Start* from the list.
4. To put an individual party on hold, select the party from the *Switchboard* and click **Hold**.

## Escalate Call with Mid-Conference-Hold

1. While on the call, click **Escalate** to let the system automatically select a supervisor, or click right **Escalate** and select the name of a supervisor from the list.
2. When the call is answered, consult with the supervisor.
3. Click **Conference** and select *Start* from the list.
4. To put the conference on hold, click **Conference** and select *Hold*. The other parties continue their conversation.

## Escalate Call with Emergency

- While on a call, click **Emergency** and select an available supervisor's name from the list. A three-way conference is immediately established. An icon next to the supervisor's name indicates their availability.



## Save vCard

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

While a call is active, click the **Add vCard** button in the call pop-up notification window.

## Open URL

You can open a URL page in your browser, to obtain more information about the incoming call. This page contains information about the calling party encoded in its URL.

While on a call, click the **Web Pop URL** button in the call pop-up notification window.



## Display Call History

- From the *Menu* bar, select *Tools – Call History*.


## Order Call History

To order the call history according to a column:


1. In the *Tools – Call History* dialog box, click the column header. The history log is sorted in descending order.
2. Click the column header again to change the order to ascending.

## Delete Call History

To delete all call logs:

In the *Call History* tab, click **Clear All**  and then confirm your action. This clears all call logs entries in Call History.

To delete selected log entries:

1. In the *Call History* tab, select the call log you want (*Dialed*, *Received*, or *Missed*).
2. Select the call log entry you want to delete by clicking it. To select more than one entry, hold CTRL or SHIFT keys while doing it, or, to select all calls in this log, click **Select All** .

3. Click **Clear**, and then confirm your action. The selected calls in the selected call logs are cleared.

## Show or Hide Directory Tab

To make a directory tab visible in the *Content* panel:

1. From the *Menu* bar, select *View* and then *Directories*.
2. In the *Directories* menu, check the directories you want to show in the *Content* panel.



## Display Directory

In the *Content* panel, click the tab of the directory you want to display.

## Search Directory

To search for a contact based on specific criteria:

1. In the *Search* box at the bottom of the *Content* panel, type the information you want to search on.

2. Click **Search**.  
The directory displays the contacts that match the search criteria.

3. To return to the unfiltered directory, click **Reset**.

## Supervisor Tasks



## Display Status and Statistical information

To display the status and statistical information about the agents and queues you manage, on the Menu bar, click *View*, and then select *Monitoring* and *Dashboard*.

To display the status information, in the *Content* panel, click the *Monitoring* tab to view the current status, or click *Dashboard* to view statistics.

## Monitor Agents

You monitor agents using the *Team* panel, which shows real-time status of the agents you supervise and allows you to change the state of an agent.

The call state of an agent can be available to receive a call, on a call/busy, do not disturb, private, forwarding always, and not available.

The ACD state of an agent can be signing-in, available, unavailable, wrap-up, and signed-out.

To assign an ACD state to an agent:

1. In the *Team* panel, select the agent.
2. Click **Force Agent ACD State** and select the ACD state from the drop-down list.
3. In addition, if you selected *Unavailable* and the use of unavailable codes is required, select an unavailable code from the drop-down list.



## Monitor Queues

The *Call Centers* panel shows the call centers you are managing. You can expand a call center by clicking the plus icon. When expanded, the first 25 calls in the queue appear.

The call center *Status* can be: *Night Service*, *Night Service Override*, *Holiday Service*, *Forced Forward*, or *\*\** (none of the above).

A triangle in the *Position* column indicates a bounced call; an arrow indicates a reordered call. A loudspeaker in the *Wait in Queue* column indicates that the caller is being played an announcement.

## Pick Up Agent Call

- In the *Team* area of the *Monitoring* tab, select an agent with the status "Ringing" .
- Click **Call Pick-Up**.  
You can now speak to the calling party.

## Silently Monitor Agent

1. In the *Team* area of the *Monitoring* tab, select an agent who's on call .
2. Click **Silent Monitor** at the bottom of the *Team* panel.

A monitoring icon is displayed next to the agent's name while they are being monitored.

3. To stop monitoring the call, click the **Silent Monitor** button and select *Leave Silent Monitoring* from the list.
4. To barge-in on the call you are monitoring, click the **Silent Monitor** button, and select *Barge-In*.

## Barge-In On Agent

1. In the *Team* area of the *Monitoring* tab, select an agent who's on call .
2. Click **Barge In**. A conference call is established.
3. To leave the conference, click **Conference** and select *Leave*.  
Alternatively, to drop a party from the conference, select the party's name from the *Switchboard* and click **End**.

## Promote Call in Queue

1. In the *Call Centers* panel, select a queue.
2. From the *Queue Detail* sub-table, select the call to promote.
3. Click **Promote** and from the drop-down list, select the priority to which you want to promote the call.


## Position Call in Queue

1. In the *Call Centers* panel of the *Monitoring* tab, select a queue.
2. From the *Queue Detail* sub-table, select the call to reposition.
3. Click **Reorder** at the bottom-right of the panel, and select a new position for the call.

**NOTE:** You cannot place a call ahead of a bounced call

## Retrieve Call from Queue

1. In the *Call Centers* panel, select a queue.
2. From the *Queue Detail* sub-table, select the call to retrieve.
3. Click **Retrieve**, at the bottom of the panel.
4. Answer the retrieved call.

## Retrieve Call from Queue to Number

1. In the *Call Centers* panel, select a queue.

- From the *Queue Detail* sub-table, select the call to transfer.
- Click **Retrieve**.
- Dial or select the destination number and click **Transfer**.

## Transfer Call to Ad-hoc Number



- In the *Call Centers* panel, select a queue.
- From the *Queue Detail* sub-table, select the call to transfer.
- Click the right side of the **Queue Transfer** button and enter the destination number on the Dial Pad.

## Transfer Call between Queues

- In the *Call Centers* panel, select a queue.
- From the *Queue Detail* sub-table, select the call to transfer.
- From the *Queue Transfer* list, at the bottom of the tab, select the target queue. The call is transferred to the back of the queue.



## Transfer Call to Top of Queue

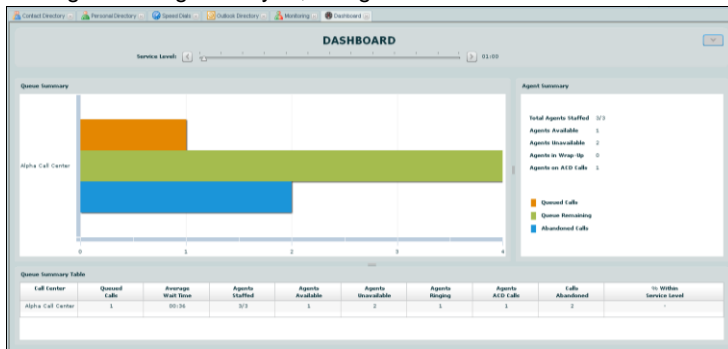
- In the *Call Centers* panel, select a queue.
- From the *Queue Detail* sub-table, select the call to transfer.
- Click **Retrieve**. The call is now visible on the Switchboard.
- Select the call, click **SHIFT Transfer**, and select the destination queue from the drop-down list.

## Transfer Call from Queue to Agent

- In the *Call Centers* panel, select a queue.
- From the *Queue Detail* sub-table, select the call to transfer.
- From the *Queue Transfer* list, at the bottom of the tab, select the target agent.

## View Agents and Queues Statistics

You can view real-time call and agent statistics, for the Call Centers and agents assigned to you, using the *Dashboard* tab.



- 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.
- The *Queue Summary Table* shows queue statistics on a per-Call Center basis in a tabular form.

## Reports

The following reports are available to you:

- Agent Activity (historical or real-time) – Provides metrics about agents call handling activities for a Call Center.
- Agent Utilization (historical) – Provides metrics related to agents call performance for a Call Center.
- Queue Performance Analysis (historical or real time) – Displays metrics related to the performance of a Call Center ACD.
- Service Level (historical) – Displays metrics related to the speed of answering ACD calls.

## Display Report

- From the Menu bar, select *View* and then *Reports*.
- Select the report type you want.
- In the dialog box that appears, enter the required information.
- Click **Display**.  
The report appears in the *Content* panel.

## Refresh Report

Only real-time reports can be refreshed to show the most recent data.

To refresh a report, click **Refresh**.

## Print or Export Report

You can print a report or export it to a file that can be opened in Excel or in a text editor.

To print a report, at the bottom of the report, click **Print**.

To export a report to a file:

- At the bottom of the report, click **Export** and select Excel XML or CSV format.
- Specify the location where you want to save the file.

## Keyboard Shortcuts

General and Menu Bar Control Keys	
ESCAPE	Exit from the active window.
Ctrl + A	Toggle between <i>Available</i> and <i>Unavailable</i> states.
Alt + W	Change your status to <i>Wrap-Up</i>
<NumPad 0...9)	Dial digits of a phone number
Menu Bar Control Keys	
Alt + O	Display Tools – Options.
Alt + R	Display Tools – Call History.
Alt + H	Open <i>Call Center User Guide</i> .
Alt + L	Toggle between login and logout.
Alt + F4	Exit the Call Center.
F11	Toggle between full screen and compact mode for the Call Center window.
Directories Control Keys	
Alt + 1	Click the <i>Contact Directory</i> tab.
Alt + 2	Click on <i>Personal Directory</i> tab.
Alt + 3	Click on <i>Speed Dials Directory</i> tab.
Alt + 5	Click on <i>LDAP Directory</i> tab.
Alt + 5	Click on <i>Outlook Directory</i> tab.
ALT-M	Click on <i>Monitoring</i> tab.
ALT-D	Click on <i>Dashboard</i> tab.
Control Keys	
ENTER	Click <b>Dial</b> .
<NumPad+>	Click <b>Transfer</b> .
<NumPad.>	Click <b>End</b> .
F1...F10	Click <b>Answer</b> after selecting a call in a queue, or double-click an active call.
F1...F10	Click <b>Hold</b> after selecting a call in a queue, or double-click an active call.
F1...F10	Click <b>Unhold</b> after selecting a call in the queue, or double-click an active call.
Ctrl + <Number Pad +>	Click <b>Conference</b> .
Ctrl + Alt + <Number Pad +>	Click <b>Conference Hold/Conference Unhold</b> .
Ctrl + Alt + Shift + <Number Pad +>	Click <b>Leave Conference</b> .
Ctrl + Shift + <Number Pad +>	Click <b>End Conference</b> .