XO Hosted PBX Call Center Agent

User Guide

Document Version 1.0

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1 Summary of Changes

This section describes the changes to this document for each release and document version.

1.1 Changes for Release

This is the initial release of Call Center for XO Hosted PBX.

2 About This Document

This user guide provides step-by-step procedures and reference information for using XO Hosted PBX Call Center client application.

2.1 Audience

This document is intended for Call Center agents and supervisors who use the XO Hosted PBX Call Center client.

2.2 How This Guide is Organized

The following table identifies the sections to refer to for information about the functionality provided by Call Center.

Section	Overview
Introduction to Call Center	This section provides an overview of Call Center and the functionality available to agents and supervisors.
Getting Started	This section describes how to sign in and out of Call Center, perform the initial setup, change a password, and obtain help.
Explore Workspace	This section provides an overview of the user interface.
Manage Calls	This section provides information on how to make and manage calls. This includes using your contacts to make calls or perform actions on existing calls.
Manage Contacts	This section provides information on managing contact directories and searching for contacts.
Monitor Supervisors	This section describes how agents can monitor the phone state of selected supervisors.
Generate Reports	This section describes how to generate and schedule reports.
Configure Call Center	This section describes the settings you can configure to set up and customize Receptionist for improved usability.
Appendix A: Glossary and Definitions	This appendix contains definitions of terms used in Call Center.
Appendix B: Keyboard Shortcuts	This appendix describes the keyboard shortcuts available in Call Center.

2.3 Additional Resources

For more information on Call Center and on Application Server procedures used by group administrators, department administrators, and users, see the following XO Hosted PBX guides:

- *XO Hosted PBX Call Center Quick Reference Guide*
- *XO Hosted PBX Call Center Reports Guide*

3 Introduction to Call Center

XO Hosted PBX Call Center is a carrier-class communications management product fully integrated which provides an advanced Automatic Call Distribution capability.

Call Center delivers the following real benefits to users:

- Efficient call handling and automatic call distribution (ACD) state management by Call Center agents
- Integration of online directories with Click-To-Dial capability
- Real-time monitoring of agent and queue activity by Call Center supervisors
- Historical reporting on agent and queue activity by Call Center supervisors

3.1 Call Center – Agent

The Call Center – Agent client is designed to support the needs of Call Center agents in any environment. It supports the full set of call handling functions, ACD state management, integration of multiple directories, Outlook integration, and other features required in large call centers.

Figure 1 shows the main interface of the Call Center – Agent.

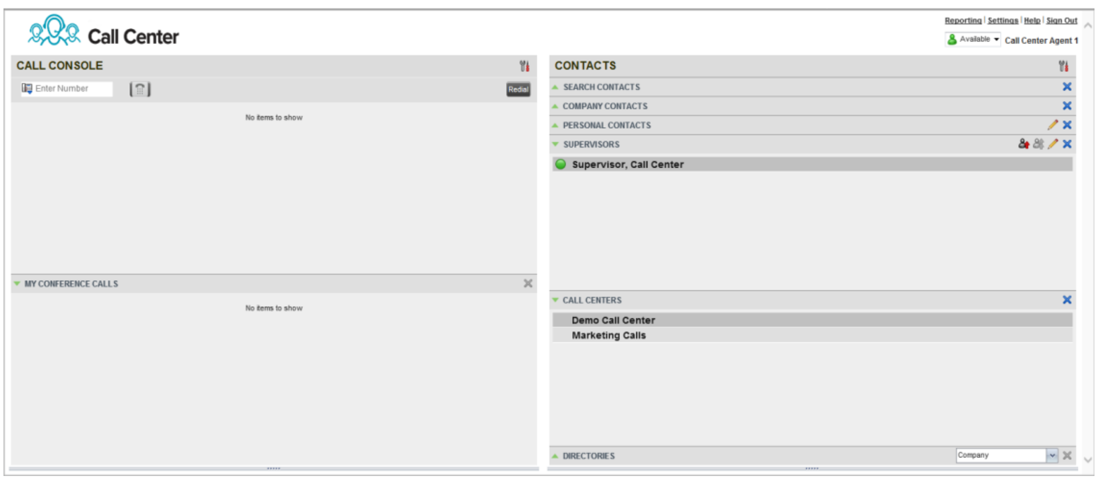


Figure 1 Call Center – Agent Main Interface

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays information about you and contains links to other pages and functions.
- **Call Console** – You use the *Call Console* to view and manage your current calls.
- **Contacts pane** – The *Contacts* pane contains your contact directories, the list of your supervisors, and the list of the call centers to which you belong. It allows you to use your contacts to make and manage your calls.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Call Center.

For more information about the Call Center user interface, see section *5 Explore Workspace*.

Call Center functionality available to agents is described in the following sections:

- Getting Started
- Manage Calls
- Manage Contacts
- Monitor Supervisors
- Configure Call Center

4 Getting Started

Call Center is hosted on the XO Hosted PBX network and you access it over the internet either from your web portal or from a web browser. The sign-in procedure is the same for agents and supervisors.

NOTE 1: The minimum screen resolution required for the Call Center is 1024 x 768 pixels.

NOTE 2: Call Center does not support logging in as different users from the same machine at the same time.

4.1 Launch Call Center

4.1.1 From My Phone Dashboard

1) Log in to your XO Hosted PBX My Phone web portal.
2) From the My Features tab, push the Call Center button. In the Call Center Information screen, hit the Activate Agent button.

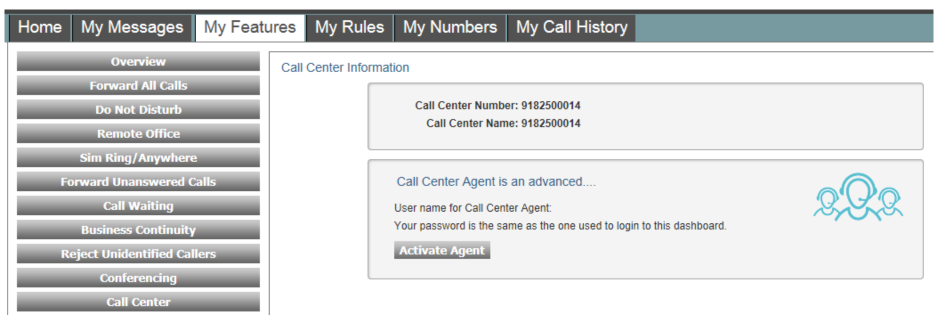


Figure 2 XO Hosted PBX Web Portal Logo Pane – Launching Call Center as Agent

3) Enter your XO Hosted PBX user ID in *user@domain* format and enter your password.

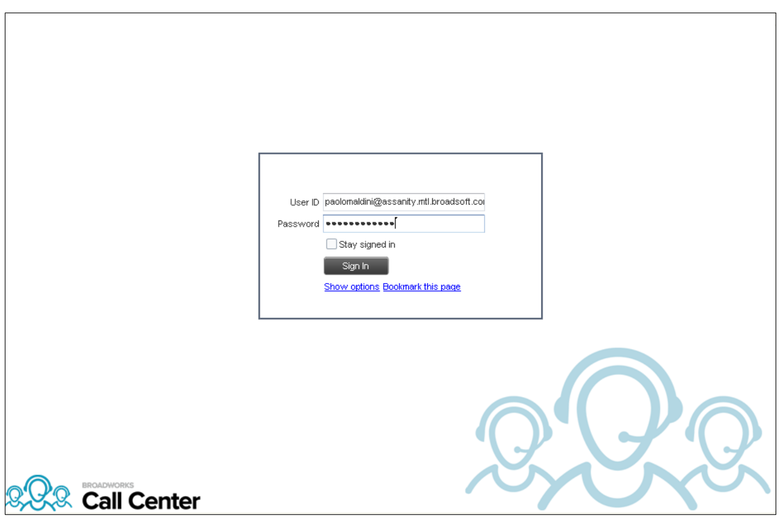


Figure 3 Call Center Sign-in Page

If you are unsure of your user ID or password, contact your administrator.

You can also enter just the *user* part of your ID. The system then appends the default domain to it before authenticating you. However, if your domain is different from the default domain, you have to enter your user ID with the domain name.

Optionally, if your system has been configured to allow it, you can configure your domain name.

4) Check *Stay signed in* to instruct the client to automatically reconnect and sign in to the server when it detects a network connection.

   This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost.

5) To configure your domain name or the Call Center language, click **Show options**. The area expands, displaying advanced options.

Figure 4 Call Center Sign-in Page – Advanced Options

6) To configure your domain, in the *Append Domain* text box, enter your domain name. When you enter your user ID without a domain, the system appends the configured domain instead of the system-wide default domain.

7) The Hotel Host option is not available at this time, but is reserved for future functionality.

8) English (US) is the only supported language at this time. Another language may be selected, but only English (US) will be shown.

9) To add a bookmark to this page in your browser, click **Bookmark this page** and follow the instructions of your browser.

10) Click **Sign In**.

    Call Center starts and you are signed in.

4.1.2 To Sign in from Web Browser

1) In your web browser, enter the Uniform Resource Locator (URL) of the Call Center client. The *Call Center Sign-in* page appears.

2) Follow from Step 3 above.

4.2 Get Help

Call Center provides you with online access to a portable document format (PDF) version of this guide.

Figure 5 Main Interface (Top of Page) – Help Link

To access the document, click the **Help** link in the top right-hand side of the main interface.

4.3 Sign Out

1) To sign out of Call Center, click **Sign Out** at the top right-hand side of the main interface.

   If you are the last agent to sign out of a call center, a message appears, providing the details of queues in which you are the last agent to sign out and asking you to confirm that you want to sign out.

> **NOTE**: This functionality is not available when you close the application using the browser's Close button or when you refresh (F5) the browser.

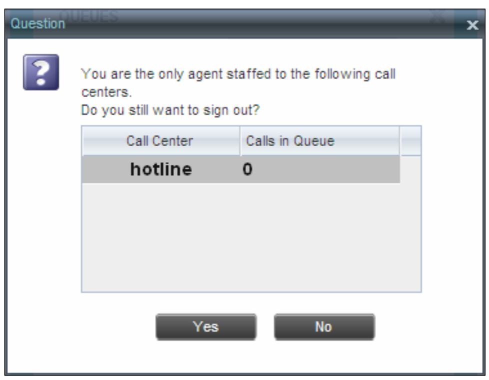


Figure 6 Dialog Box – Signing Out Last

2) To stay signed in, click **No**. You are returned to the application.

   – To continue signing out, click **Yes**.

     A message appears asking whether you would like to save your current workspace.

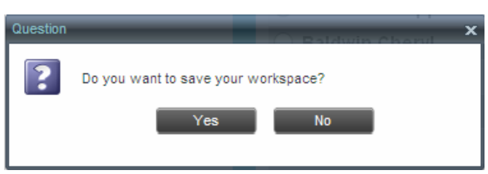


Figure 7 Dialog Box – Saving Workspace on Sign Out

   – To save your current workspace, click Yes. This allows you to retain the same interface setup at your next session. For information about the elements of the Call Center workspace that can be customized and retained between sessions, see Set Up Call Center

When you sign in to Call Center for the first time, it is recommended that you configure the following settings:

- Configure the queues you want to join on sign-in.
- Configure your post sign-in and post call ACD states.

  For information, see section *10.2 Settings – Application*.
- Configure the supervisors whose call status you want to monitor. For information, see section *8.1 Select Supervisors to Monitor*.

For more information about the settings you can configure in Call Center, see section *10 Configure Call Center*.

4.4 Change Your Password

You can change your password when you are signed in to Call Center.

1) To change your password, click the **Settings** link at the top right-hand side of the main page.
2) Click the **General** tab and then click **Change Password**.

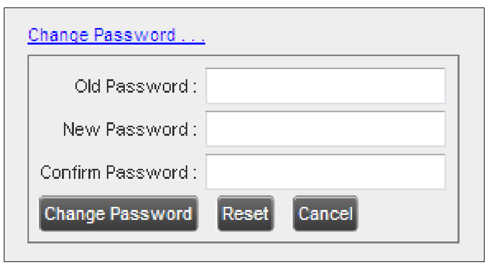


Figure 8 Changing Password

3) Enter your old and new password in the provided text boxes and click **Change Password**.

   Note that the Reset button does not reset your password. It only clears the input boxes.

NOTE: This password is shared with your web portal and other client applications that share XO Hosted PBX Single Sign-On feature. It must meet the password requirements set on XO Hosted PBX.

4.5 Change Your ACD State

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

Figure 9 Logo Pane – ACD State Control

Available

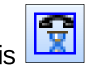
Unavailable

Wrap-up

4.6 Enable or Disable Services

You can use the following services in Call Center: Call Waiting, Call Forwarding Always, and Do Not Disturb, provided that your administrator has assigned the services to you.

To enable or disable Call Waiting:

1) In the *Call Console*, click **Call Waiting** . The button changes to this  to indicate that the service is enabled.
2) To disable it, click the button again.

To enable or disable Do Not Disturb or Call Forwarding Always:

1) At the top right-hand corner of the main page, click **Settings**. The *Settings* page appears.
2) Click the **Services** tab.
3) On the *Services* page that appears, select the service you want to enable or disable, and check or uncheck the *Active* box.
4) If you checked the *Active* box for the Call Forwarding Always service, in the *Forward To* text box, enter the phone number to forward your call to. Also, Check the *Ring Splash* box if you would like to be notified by short ring to let you know a call came in and was forwarded.
5) Click **Save**.

For more information, see section *10 Configure Call Center*.

5 Explore Workspace

When you sign in to Call Center, the main page appears where you perform most of your call management or monitoring tasks. In addition, the main page provides links to other pages and windows of Call Center, where you change other Call Center settings.

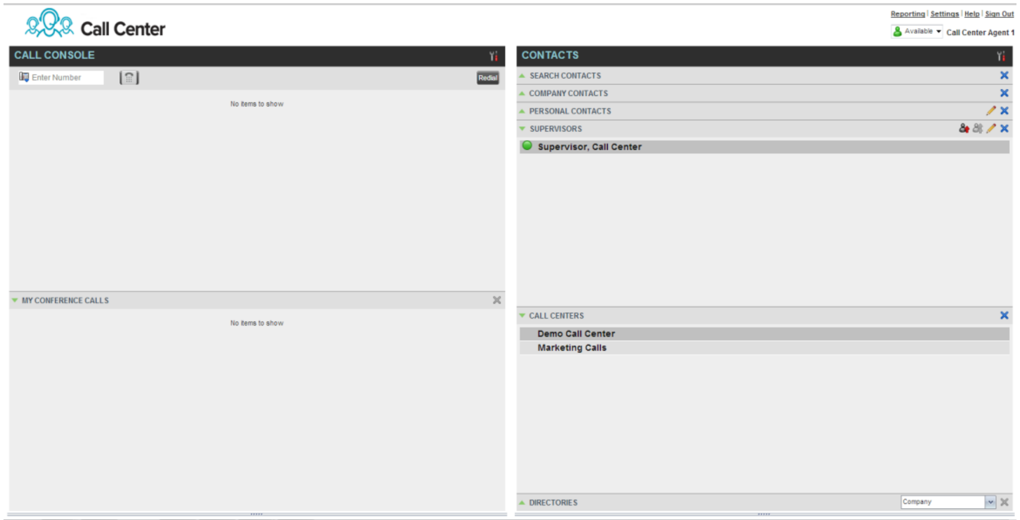


Figure 10 Call Center – Agent Main Interface

Many visual aspects of the Call Center workspace are configurable. For example, you can change the size and placement of windows on the screen. You can then save your workspace and retrieve it the next time you sign in.

NOTE 1: To work in full screen mode, make sure that the main window is in focus and then click **F11**.

NOTE 2: The Back, Forward, and Refresh operations of the web browser are not supported by Call Center, and if performed, the results are inconsistent.

NOTE 3: When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

Most call center controls are context-based, which means that they appear only when the action they represent can be taken. Context-based controls that allow you to take actions on calls are called action buttons. For the list of controls available in Call Center, see section *5.4 Controls*. The action buttons are described in section *5.4.1 Call Action Buttons*.

The Call Center interface contains the following elements:

Interface Element	Description
Logo Pane	Located at the top of the main interface, the *Logo* pane displays global messages, information about the logged user, and links to other Call Center interface elements and functions.
Call Console	The *Call Console* is where you manage your current calls.

Contacts Pane	The *Contacts* pane contains your contact directories and allows you to manage your contacts and use contacts to make calls or take actions, such as transfer to contact or queue, on existing calls.
Call History Window	The *Call History* window, accessible from the *Call Console* via the Call History button, displays your placed, received, and missed calls, and allows you to make calls from history and delete call logs.
Settings Pages	The *Settings* pages, accessible from the main page via the Settings link, allow you to configure various user-level and application settings.
Controls	You use controls, such as buttons and drop-down lists to execute actions on calls, contacts, queues, and so on.

This section describes the following elements of the Call Center interface:

- Logo Pane
- Call Console
- Contacts Pane**Error! Reference source not found.**
- Controls

For information about other interface elements, see the following sections:

- *Report* windows – Section *9 Generate Reports*
- *Settings* pages – Section *10 Configure Call Center*

5.1 Logo Pane

The Call Center main window interface contains a logo pane that displays the Call Center client or company logo, global messages, links to other interface elements or Call Center functions, and information about the logged-in user.

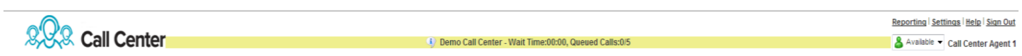


Figure 11 Call Center Logo Pane

5.1.1 Global Message Area

The *Global Message Area,* that is, the center area of the *Logo* pane, is used by Call Center to display various information, warnings, and error messages to the user. A message is displayed for several seconds and then it disappears.

5.1.2 Links to Other Interface Elements and Functions

The *Logo* pane displays links to the *Settings* pages and the Help and Sign Out links.

5.1.3 Logged User Information

Information about yourself, that is, your name, your availability to take calls, and your voice mail status, is displayed at the top right-hand side of the main interface.

Your current ACD state is displayed to the right of your name. You can change your ACD state by selecting a new state from the drop-down list.

- ACD State 

In addition, information about the following services and features is provided:

- Do Not Disturb (DND) 

- Call Forwarding Always (CFA)
- Busy Phone State
- Voice Messaging

The information is presented in the form of icons to the left of your name in the following format:

<DND/CFA/Busy> <Voice Messaging>

The <DND/CFA/Busy> state is represented by one icon, where Do Not Disturb has precedence over Call Forwarding Always, which has precedence over your Busy Phone State. If none of the services is enabled and your phone state is *Idle*, the icon is not displayed.

The Voice Messaging icon is present only if you have outstanding voice messages.

5.2 Call Console

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section 6 *Manage Calls*.

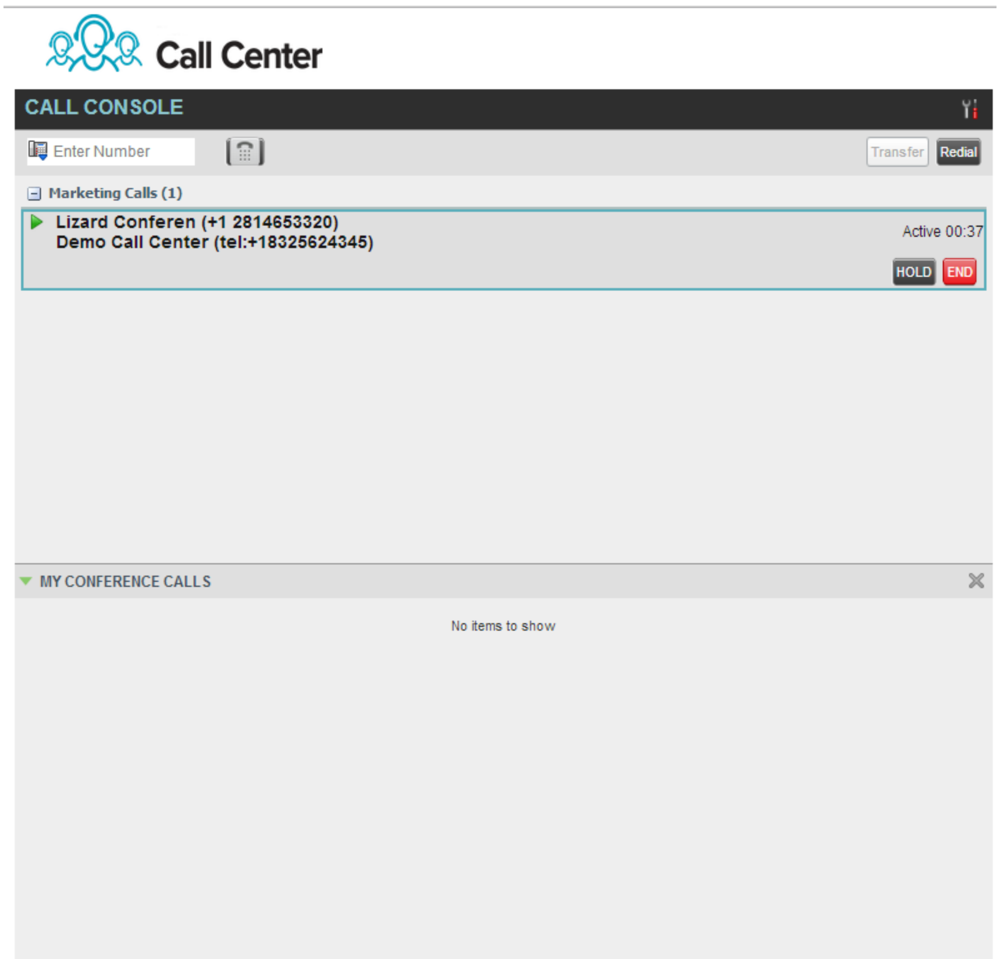


Figure 12 Call Console

The *Call Console* contains the following areas:

- Header Bar
- Dialer
- Current Calls
- Conference Call

5.2.1 Header Bar

The header bar contains various controls that allow you to configure your services and perform call and service-related actions.

Figure 13 Call Console Header Bar

The header bar can contain the following controls:

- Call Waiting button  – This allows you to enable or disable the Call Waiting service.
- Options button- Enables grouping of calls

5.2.2 Dialer

The *Dialer*, located at the top of the *Call Console*, below the header bar, allows you to make ad hoc calls and set your outgoing calling line identity (CLID) for the next call.

Figure 14 Dialer

It contains the following elements:

- The Outbound CLID button , which allows you to configure the number you want to use for outgoing calls.
- The *Enter Number* text box, in which you enter the number to dial.
- Action buttons, which change depending on the context and allow you to perform operations on calls. For more information, see section *5.4.1 Call Action Buttons*.

5.2.3 Current Calls

The *Call Console* displays your current calls, both direct and ACD, and allows you to take actions on them. Direct calls are calls placed from or received on your own phone number, whereas ACD calls are calls routed to you from a call center that you are staffing as an agent.

If you are involved in a conference call, its details are displayed in a separate area of the Call Console, called the *Conference Call* panel. The *Conference Call* panel is described in the following section.

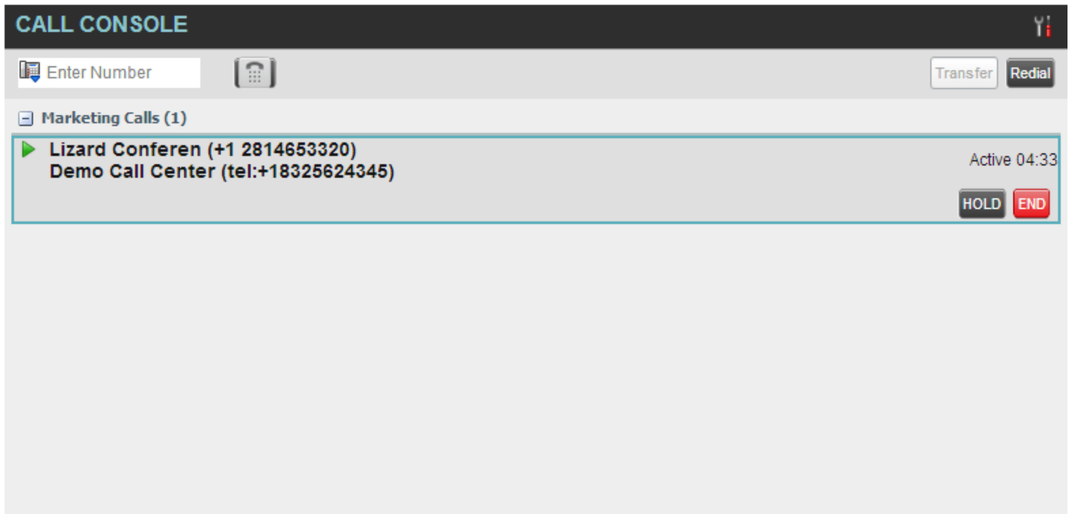


Figure 15 Call Console – Current Calls

The following information is displayed for each call:

- Call State icon – This is a visual representation of the current state of the call. For more information, see section *5.2.5 Call States and Actions*.
- Remote CLID – This is the name of the remote party (if available) and the phone number in parenthesis.
- Call State name – This is the display name of the "call" state the call is currently in.
- Call duration [Held duration] – This is the duration of the call from the time the call was received from XO Hosted PBX and it reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is displayed.

The call entry also displays action buttons for the operations that you can currently take on that call. The actions you can perform depend on the state of the call.

For the list of Call Center action buttons, see section *5.4.1 Call Action Buttons* and for the list of actions that can be taken in each call state, see section *5.2.5 Call States and Actions*.

5.2.4 Conference Call

The *Conference Call* panel displays your current conference and allows you to manage your conference calls.

NOTE: You can only be involved in one conference call at a time.

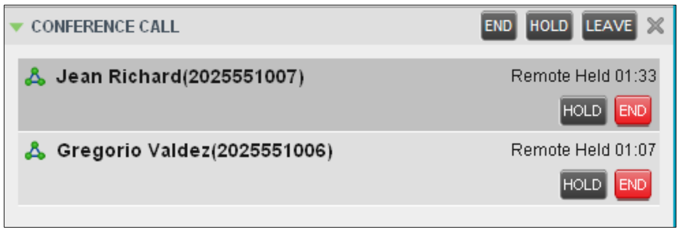


Figure 16 Call Console – Conference Call

The header bar contains various controls that allow you to manage the conference:

- END End Conference button – This allows you to end the current conference.
- LEAVE Leave Conference button – This allows you to leave the conference.
- HOLD Hold Conference button – This allows you to place the conference on hold.
- ANS Resume Conference button – This allows you to resume the conference that you previously placed on hold.

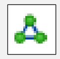
The *Conference Call* panel, when expanded, lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for two-way calls. For information, see section *5.2.3 Current Calls*.

For information on managing conferences, see section *6.9 Manage Conference Calls*.

5.2.5 Call States and Actions

The following table lists the possible call states and actions that can be performed on calls in each state.

Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Local)	Incoming Local		Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, End, Conference
On Hold	Held		Any	Transfer, Resume, End, Conference
On Hold (Remote)	Remote Held		Any	Transfer, Hold, End, Conference

Call State	Display Name	Display Icon	Call Personality	Call Actions
Active (In Conference)	Active		Conference	Transfer, Hold, End
Held (In Conference)	Held		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Call Recalled		Terminator	Answer, Conference, End

5.3 Contacts Panel

The *Contacts* pane contains your contact directories and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see section 6 *Manage Calls*. For information about organizing and managing your contact directories, see section 7 *Manage Contacts*.

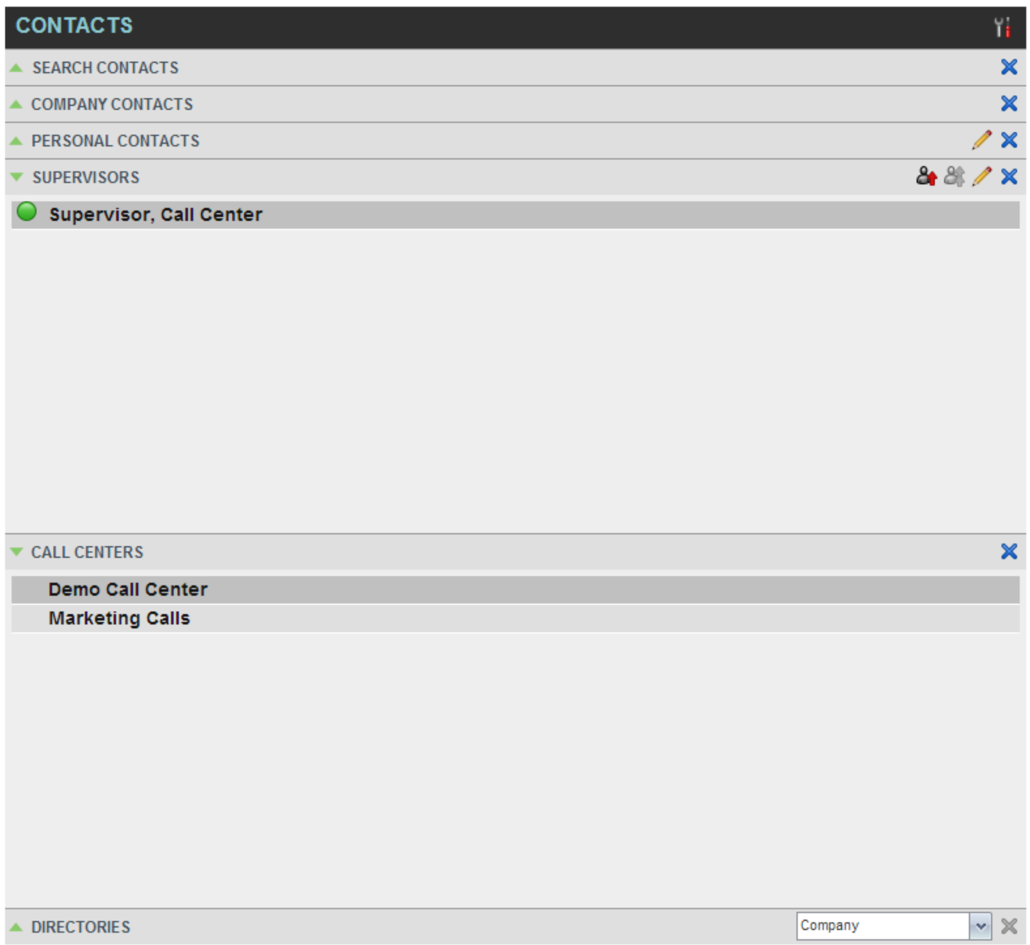


Figure 17 Contacts Pane

The *Contacts* pane contains the following panels:

- Search Panel
- Company Panel
- Personal Contacts

- Supervisors Panel
- Call Centers Panel
- Outlook Panel
- Directories Panel

The contact directories you have access to depend on your system configuration as well as the services assigned to you. For more information, contact your administrator.

The directories you see in the *Contacts* pane also depend on your setup. For information on selecting the directories to display in the *Contacts* pane, see section *7.1.1 Show or Hide Directories*.

When you click a contact, the entry expands and the contact's information, such as phone numbers and the action buttons for the operations that you can currently take on that contact appear.

You can only view the details of one contact per directory at a time. When you click another contact in the same directory, the details of the currently expanded contact are automatically hidden.

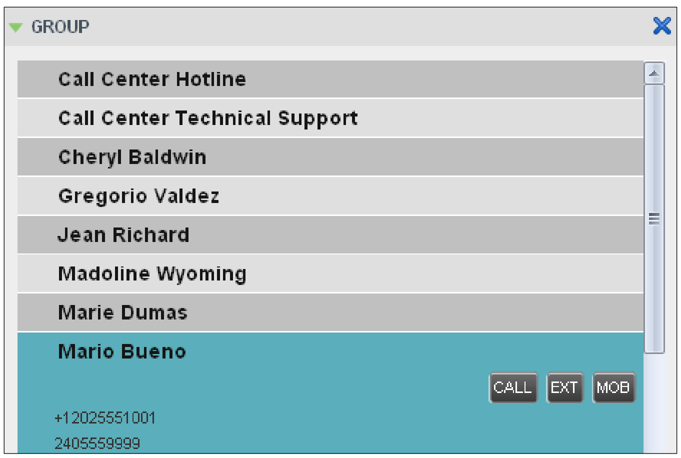


Figure 18 Group Panel – Contact in Focus with Action Buttons

For the list of Call Center action buttons, see section *5.4.1 Call Action Buttons*.

5.3.1 Search Panel

You use the *Search* panel to look for specific contacts in your contacts' directories and, if available, in the configured *LDAP* directory. For information about performing contact searches, see section *7.3 Search for Contacts*.

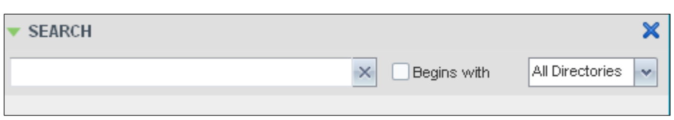


Figure 19 Contacts Pane – Search Panel

5.3.2 Company Panel

The *Company Contact* panel contains the contacts in your XO Hosted PBX enterprise directory.

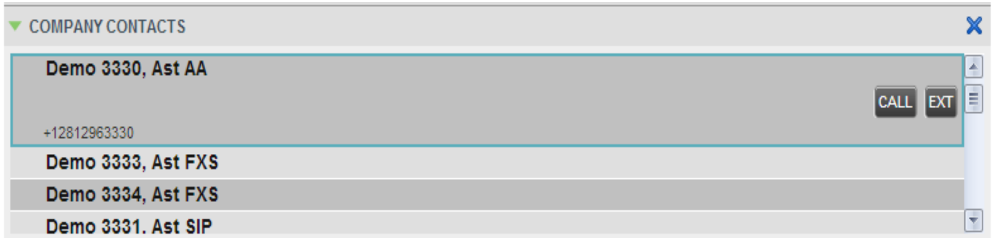


Figure 20 Contacts Pane – Company Contacts Panel

5.3.3 Personal Contacts Panel

The *Personal* panel contains the contacts from your XO Hosted PBX Personal Phone List which have been entered in the client. It displays the name/description and phone number of each contact.

For information about managing your personal contacts, see section *7.4 Manage Personal Contacts*.

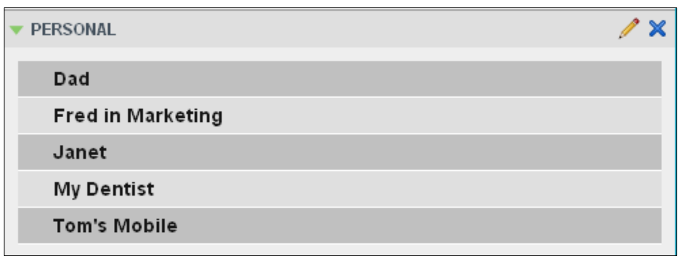


Figure 21 Contacts Pane – Personal Panel

5.3.4 Supervisors Panel

The *Supervisors* panel, available to agents, contains the list of your supervisors. The main purpose of this directory is to allow you to contact a supervisor quickly.

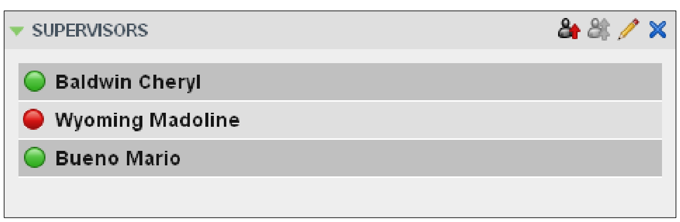


Figure 22 Contacts Pane – Supervisors Panel

Selected supervisors have their call status displayed. For more information, see section *8 Monitor Supervisors*.

5.3.5 Call Centers Panel

The *Call Centers* panel is available to both agents and supervisors. It lists the call centers you are staffing as an agent or monitoring as a supervisor and the associated Dialed Number Identification Service (DNIS) numbers. The primary purpose of this panel is to provide you with a quick way to transfer calls to queues.

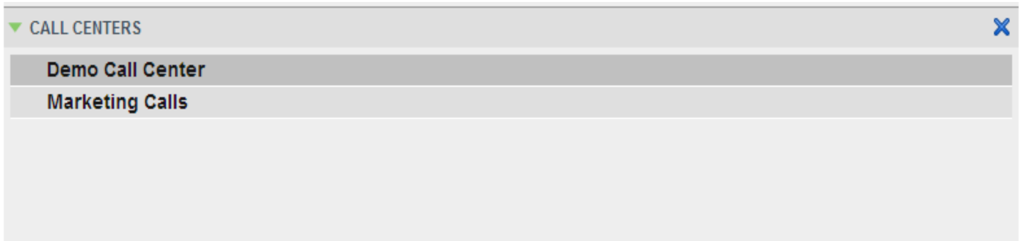


Figure 23 Contacts Pane – Call Centers Panel

5.3.6 Outlook Panel

The *Outlook* panel contains your Outlook contacts. This panel is available to you if you have the Outlook Integration service assigned.

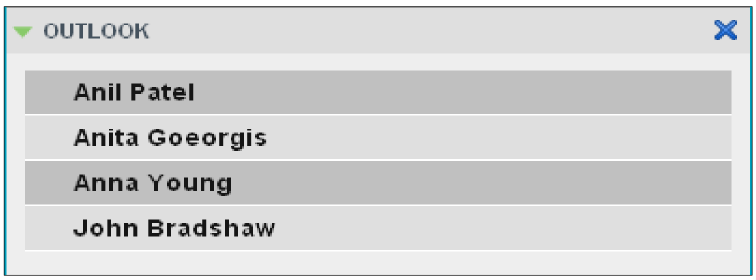


Figure 24 Contacts Pane – Outlook Panel

5.3.7 Directories Panel

The *Directories* panel consolidates the contacts from the *Enterprise* and *Personal* directories. This panel is always visible. You can choose which directories to display in the *Directories* panel and you can collapse the panel, but you cannot close it.

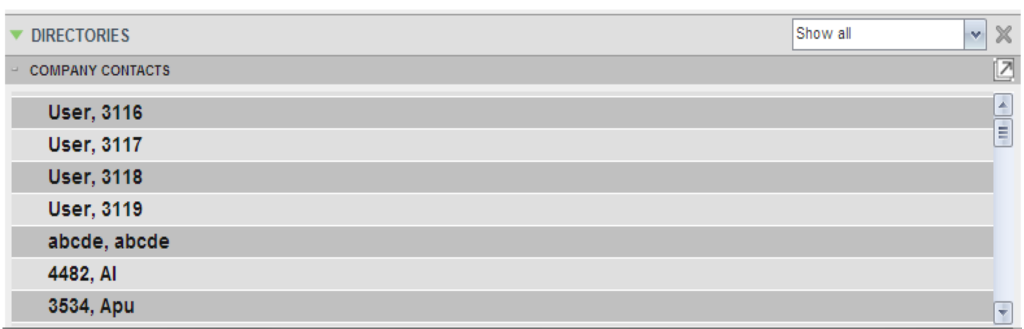


Figure 25 Contacts Pane – Directories Panel

You can also place a copy of a directory below the *Call Console*. This allows you to view more than one directory at a time easily. For more information, see section 7 *Manage Contacts*.

5.4 Controls

Call Center controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you enter a number or select a contact, a Dial button appears, allowing you to place a call. The contextual controls that correspond to call operations such as dialing, transferring calls, or putting calls on hold are called action buttons. They appear on the Dialer, in a call entry, in a directory entry (contact), or in a call log.

The following table lists the general controls used in Call Center and the controls displayed on the headers in the panels. For more information on the action buttons, see section *5.4.1 Call Action Buttons*.

Name	Description
Common Controls	
Options	This is located in the upper-right corner of a pane or page. When clicked, it displays a drop-down menu of options that control the display of information in that pane/page. The available options depend on the context.
Expand/Collapse	This shows or hides the contents of a window or panel.
Close	This closes an interface element, such as window, pane, or panel.
Edit	This allows you to edit a list of items, such as agents to monitor or speed dials.
Dialer, Call Console, Directories Panel, and Search Panel Controls	
Outbound CLID	This allows you to select the phone number to use as your Calling Line ID for the next outgoing call.
ACD States	This displays your current ACD state and allows you to change it.
End Conference	This ends a conference call.
Leave Conference	This disconnects you from the conference while allowing other participants to continue the call.
Hold Conference	This holds the conference call.
Resume Conference	This resumes a held conference.
Barge In	This “un-mutes” your Silent Monitoring call, thereby establishing a Three-Way Conference.
Pull Out Directory	This places a selected directory below the Call Console.
Dialog Box – Notification Window	
Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
vCard	This saves the caller’s phone number and personal information as a vCard in Microsoft Outlook. It appears only when Outlook is running.
Supervisors Panel	

Name	Description
Emergency	This makes an emergency call to a supervisor.
Escalate	This escalates a call to a supervisor.
Scheduled Reports Window	
Load Report	This loads a scheduled report, allowing you to view and modify it.
Delete Report	This deletes a scheduled report.

5.4.1 Call Action Buttons

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, on a call line, in a call history log, in a directory entry, or (for supervisors) in a queued call entry.

Action buttons are contextual, that is, they appear on a line/entry when the corresponding action can be performed on that entry.

For example, when you click a contact in the *Group* directory, the contact expands and the Call and Extension buttons appear on the line for that contact, allowing you to call the contact. This is illustrated in *Figure 26*. Note that other buttons may appear on the line for a contact, depending on the call state and the contact's configuration.

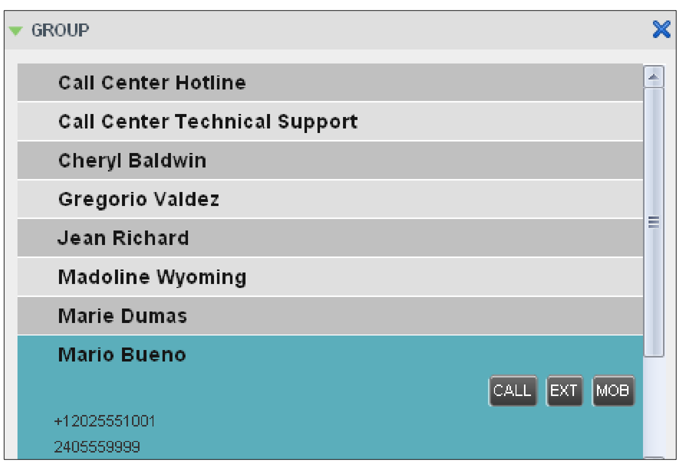


Figure 26 Group Panel – Contact in Focus

The following table lists the action buttons available in Call Center.

Button	Description
Dial	This dials the number you entered in the *Dialer*.
CALL	This places a call to the selected contact or to a number from Call History.

Button	Description
Redial	This redials the last dialed number.
EXT Extension	This dials the contact’s extension.
MOB Mobile	This dials the contact’s mobile number.
EMAIL E-mail	This brings up a new e-mail message window with the contact’s e-mail address, allowing you to send a message to the contact.
Transfer Transfer	This transfers a call to an ad hoc number entered in the *Dialer*.
TXR Transfer	This transfers a call to a selected number or contact.
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
END End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
ESC Escalate Call	This escalates a call to a selected supervisor.
EMER Emergency Call	This places an emergency call to a selected supervisor.
RETRIEVE Retrieve	This retrieves a call from the queue to the supervisor’s device. When a call is manually retrieved via this action, the call is reported as an *Incoming* call rather than an *ACD* call in the reports.
REORDER Reorder	This changes a call’s position in the queue.

6 Manage Calls

This section describes the operations you can perform to make and manage calls.

Your current calls are displayed in the *Call Console* with the calls currently involved in a conference displayed in a separate panel called *Conference Call*.

NOTE: You can only be involved in one conference at a time.

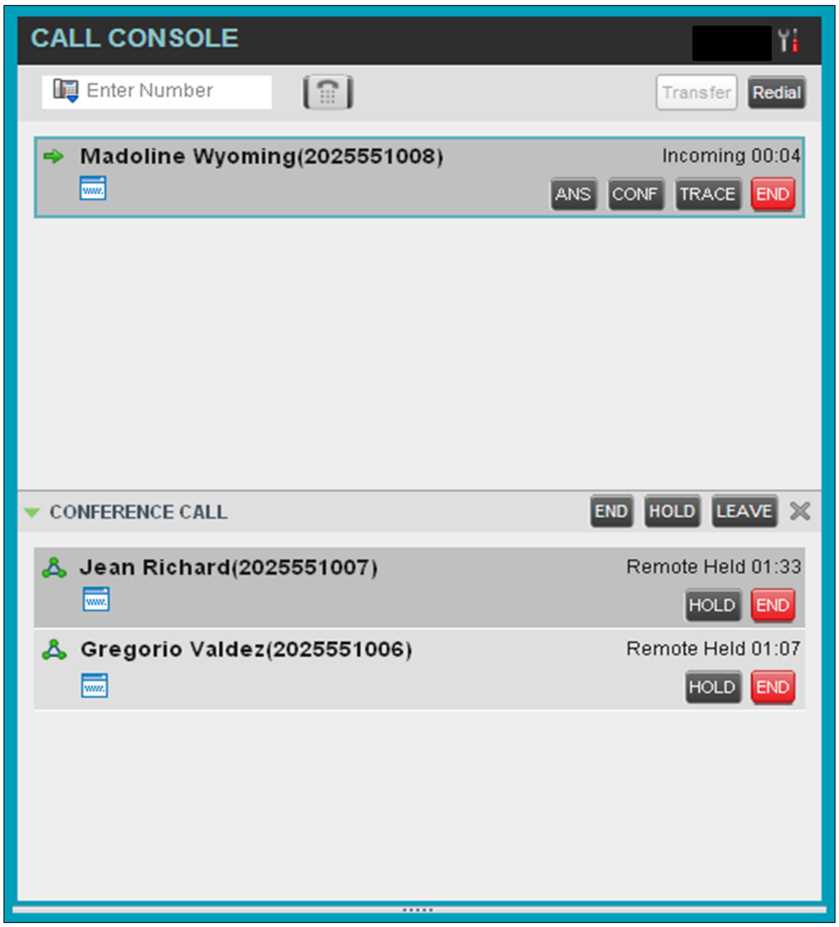


Figure 27 Call Console

The following subsection provides a quick reference to call management operations. These operations are described in detail in the rest of this section.

NOTE: For operations on calls that involve a contact, you can drag the call onto the contact and click the button for that contact, which corresponds to the operation you want to perform. For information, see *6.2 Drag and Drop Call onto Contact*.

6.1 Call Management Operations Quick Reference

The following table provides a summary of the actions that you can take to manage calls. These actions (operations) are described in more detail in the following sections.

Function	Steps
Answer Incoming Call	In the *Call Console*, click **Answer** for the target call.
Turn Auto Answer On	In the *Call Console*, click **Auto Answer**.
Open URL	In the *Call Notification* dialog box for an incoming call, click the **Web Pop URL** button.
Save a vCard	In the *Call Notification* dialog box for an incoming call, click the **Add vCard** button.
Place Call on Hold	In the *Call Console*, move the mouse over the call and click **Hold**.
Resume Held Call	In the *Call Console*, move the mouse over the call and click **Retrieve.**
Blind Transfer Call	Drag the call onto the target contact and click **Transfer** for that contact. Alternatively, enter the target number in the *Dialer* and click **Transfer** on the *Dialer*.
Transfer with Consultation	While on the call, enter a number in the *Dialer* or select a contact in the *Contacts* pane and click **Dial.** When the new call is connected, consult with the party. When ready to transfer, select the original call. Move the mouse over the new call that is not selected call and click **Transfer**.
Transfer to Queue	Drag the call onto the target queue in the *Queues* panel and click **Transfer** for that queue.
Make Emergency Call to Available Supervisor	In the *Call Console*, select the call to escalate and click the **Emergency** button in the *Supervisors* panel.
Make Emergency Call to Selected Supervisor	Drag the call to escalate onto an available supervisor in the *Supervisors* panel and click **Emergency** for that supervisor.
Blind Escalate Call	In the *Call Console*, select the call to escalate. In the *Supervisors* panel, click **Escalate** or click an available supervisor and click **Escalate** for that supervisor. In the *Call Console*, move the mouse over the call to the supervisor and click **Transfer** before the supervisor answers the call.
Escalate with Consultation	In the *Call Console*, select the call to escalate. In the *Supervisors* panel, click **Escalate** or click an available supervisor and click **Escalate** for that supervisor. Consult with the supervisor. When ready to transfer, in the *Call Console*, move the mouse over the call to the supervisor and click **Transfer**.
Escalate with Conference	In the *Call Console*, select the call to escalate. In the *Supervisors* panel, click **Escalate** or click an available supervisor and click **Escalate** for that supervisor. In the *Call Console*, move the mouse over the new call and click **Conference**.
Start Three-Way Conference	In the *Call Console*, select a call. Move the mouse over a call that is not selected and click **Conference**.
Add Participant to Conference	In the *Call Console*, move the mouse over a call and click **Conference**.
Hold Conference	In the *Conference Call* panel, click **Hold**.
Resume Conference	In the *Conference Call* panel, click **Resume**.

Function	Steps
Hold Conference Participant	In the *Conference Call* panel, select the call to put on hold and click **Hold** for that call.
Take Conference Participant Off Hold	In the *Conference Call* panel, select a held call and click **Resume** for that call.
Leave Conference	In the *Conference Call* panel, click **Leave Conference**.
End Participant	In the *Conference Call* panel, select the target call and click **End**.
End Conference	In the *Conference Call* panel, click **End Conference**.
Set Outbound CLID	In the *Dialer*, click the **Outbound CLID** button and select the number to use as your calling line identity for the next call from the list.
Dial Ad Hoc Number	In the *Dialer*, enter the number to call and click **Dial.**
Re-dial Recent Number	In the *Dialer,* click **Redial** and select a number from the list.
Dial Recent Number	In the *Dialer*, start entering the number to dial. A list of numbers starting with the entered digits appears. Select a number from the list and click **Dial**.
Dial Contact	In the *Contacts* pane, click the contact and then click **Call** for that contact.
Dial from Search	In the *Search* panel, select a contact and click **Dial**.

6.2 Drag and Drop Call onto Contact

In Call Center, you can drag a call from the Call Console and drop it on a target contact in one of your contact directories. This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green icon is displayed. When the call is dropped onto a contact, no action is taken on the call. The target contact expands and you can select the action button for the operation you want to perform on that call.

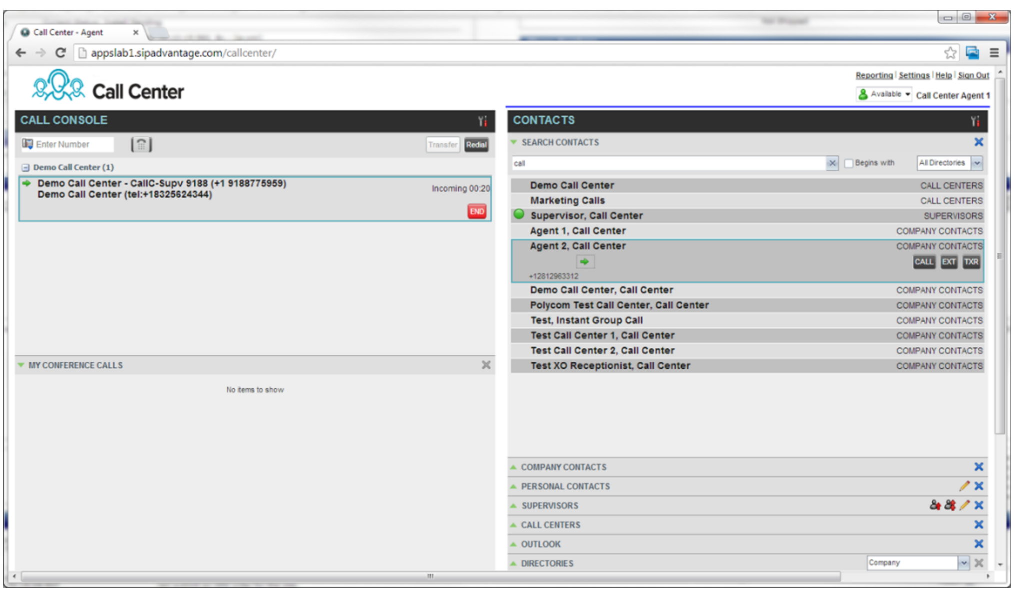


Figure 28 Dragging Call and Dropping on Contact

6.3 View Calls

You can view your current calls.

6.3.1 View Current Calls

Your current calls are displayed in the *Call Console* with the calls involved in a conference displayed in a separate pane called *Conference Call*.

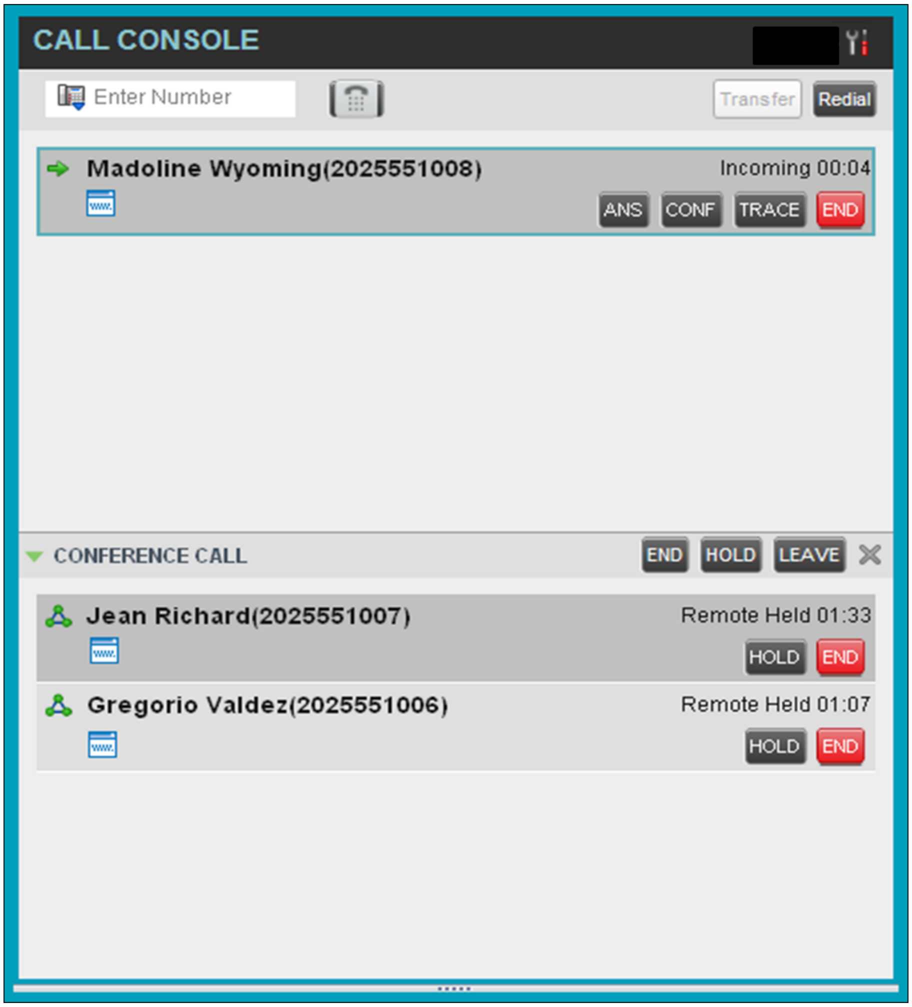


Figure 29 Call Console – View Current Calls

6.3.2 View Incoming Call Details

When the Call Notification feature is enabled, a *Call Notification* pop-up window appears on top of the system tray when you receive an inbound call.

- For calls to your direct number or extension, the following information is displayed:
  - Calling party name
  - Calling party number

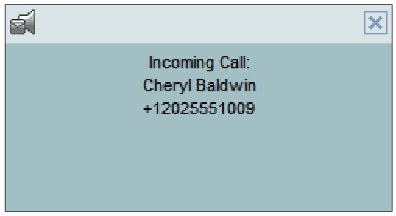


Figure 30 Call Notification Pop-up Window for Call that is Not ACD Call

- For calls from a call center, the following information is displayed:
  - Calling party name
  - Calling party number
  - Call center name or DNIS name, followed by the time the call has been waiting in queue (wait time)
  - Number of calls in queue (queued calls)

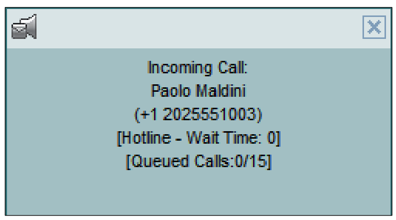


Figure 31 Call Notification Pop-up Window for ACD Call

NOTE 1: You must have only one tab open in the browser running Call Center to receive call notifications.

NOTE 2: If calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

6.4 Receive, Answer, and End Calls

6.4.1 Answer Call

NOTE: When using the Remote Office service, the Answer button is disabled.

To answer a ringing call:

Click **Answer** 

for that call.

To answer an incoming call from a *Call Notification* pop-up window:

Click anywhere on the text in the pop-up window.

6.4.2 Save vCard

When you receive a call, a *Call Notification* pop-up window appears on top of the system tray. You can click a button in this window to save the caller's phone number and personal information as a vCard in Microsoft Outlook.

To save a vCard:

In the *Call Notification* pop-up window, click the **Add vCard** button . This button is only present when Outlook is running.

6.4.3 End Call

To end a call:

Click **End** for that call.

6.5 Make Outbound Calls

You can make calls to an ad hoc number or to a contact from any of your contacts' directories. You can also specify the calling line identity to use for your outbound calls.

6.5.1 Set Your Outgoing Calling Line Identity

As a Call Center agent, you can specify whether your direct number or a DNIS number assigned to one of your call centers should be used as your calling line identity when you make calls. This allows you to conduct outbound calling campaigns with an appropriate calling line identity presented to the called party.

To set your outgoing call identity for the next call:

In the *Dialer*, click the **Outbound CLID** button and select the number from the drop-down list. The number you select is displayed as your CLID when you make the next call.

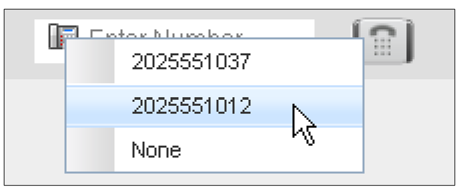


Figure 32 Dialer – Setting Outbound CLID

For information on permanently setting your outbound CLID, see section *10.2.2 Agent Policies*.

6.5.2 Dial Ad Hoc Number

You use the *Dialer,* located at the top of the *Call Console*, to place a call to an ad hoc number.

Figure 33 Dialer – Dialing Ad Hoc Number

To dial an ad hoc number:

In the *Dialer*, enter the phone number and click **Dial** . The client issues a Click-To-Dial attempt to the specified phone number and the call appears in the *Call Console*.

6.5.3 Redial Number

Call Center keeps up to ten most recently dialed numbers, which you can redial using the

Dialer.

To redial one of the recently dialed numbers:

1) In the *Dialer*, place the cursor in the text box and start entering a number. A list of recently called numbers that start with the entered digits appears.

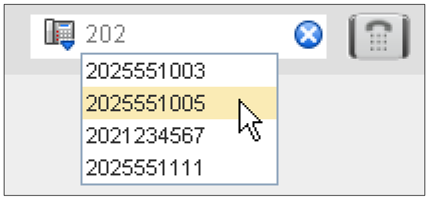


Figure 34 Dialer – Select Recently Dialed Number

2) Select the number to dial and click **Dial** .

   The client issues a Click-To-Dial attempt to the selected number.

   Alternatively, click the **Redial**  button and select the number from the list that appears.

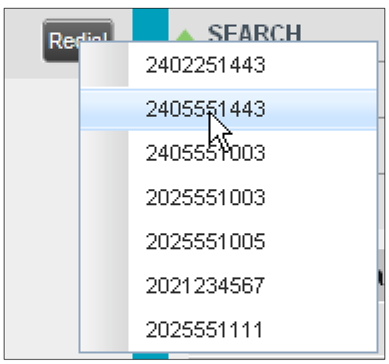


Figure 35 Dialer – Redialing Number

6.5.4 Dial Contact

You can use any directory in the *Contacts* pane to dial a contact.

To dial a contact:

1) In the *Contacts* pane, expand the directory from which you want to dial a contact.

2) Click the target contact to expand it and click **Call**  for that contact.

Figure 36 Group Panel – Expanded Contact with Action Buttons

   Alternatively, to dial the contact's extension, click **Extension**  or to dial the contact's mobile number, click **Mobile** .

The client issues a Click-To-Dial attempt to the specified phone number and the call appears in the *Call Console*.

6.5.5 Dial from Search

You use the *Search* panel in the *Contacts* pane to search for contacts in your contacts' directories. For more information, see section *7.3 Search for Contacts*.

To dial a number from search:

1) Perform a search.
2) Click the target contact to expand it and then click **Call** .

6.6 Place Calls on Hold or Resume

You can only put an active call on hold.

> **NOTE**: When using the Remote Office service, the Hold/Resume buttons are disabled.

6.6.1 Place Call on Hold

To place a call on hold:

Click **Hold** for the target call.

6.6.2 Resume Held Call

To resume a held call:

Click **Answer** for the target call.

6.7 Transfer Calls

There are a number of ways in which you can transfer a call, including blind transfer, transfer with consultation, and transfer to queue.

6.7.1 Blind Transfer

Use this method to transfer a call to another number without providing an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

To blind transfer a call to an ad hoc number:

1) From the *Call Console*, select the call to transfer.
2) In the *Dialer*, enter the destination number and click **Transfer** . The call is transferred and removed from the *Call Console*.

To blind transfer a call to a contact:

1) From the *Call Console*, select the call to transfer.
2) In the *Contacts* pane, expand the directory from which you want to select a contact.
3) Click the destination contact and click **Transfer** for that contact. The call is transferred and removed from the *Call Console*.

6.7.2 Transfer with Consultation

Use this method to transfer a call with an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

To transfer a call with consultation:

1) Make a call to the person to whom you want to transfer the call. If the first call was active, it is put on hold.
2) Wait until the called party accepts your call and speak to the party.
3) When ready to transfer, from the *Call Console*, select one of the two calls.
4) Move the mouse over the call that is not selected and click **Transfer** TXR.

   The calls are connected and removed from the *Call Console*.

6.7.3 Transfer to a Call Center

You can transfer a call back to a queue. A transferred call is placed at the bottom of the queue.

To transfer a call to a queue:

1) From the *Call Console*, select the call to transfer.
2) In the *Contacts* pane, expand the *Queues* panel.
3) Click the destination queue and click **Transfer** TXR for that queue.

   The call is transferred to the selected queue and removed from the *Call Console*.

   Alternatively, drag the call onto the target queue and click **Transfer** TXR for that queue.

6.8 Escalate Calls

You can escalate calls to the first available supervisor or to a specific supervisor. You can also make an emergency call, which quickly conferences an available supervisor into your call, without placing the remote party on hold.

You use the *Supervisors* panel located in the *Contacts* pane to escalate calls.

6.8.1 Make Emergency Call

Use this method to escalate a call to a supervisor in an emergency situation. When you make an emergency call, the caller is not placed on hold; instead, a supervisor is immediately conferenced in to the call. You can let Call Center select the supervisor or you can select the supervisor yourself.

NOTE: To make emergency calls, you must have the Three-Way Call or N-Way Call service assigned.

To make an emergency call to an available supervisor:

1) While on the call, click **Emergency** in the *Supervisors* panel.

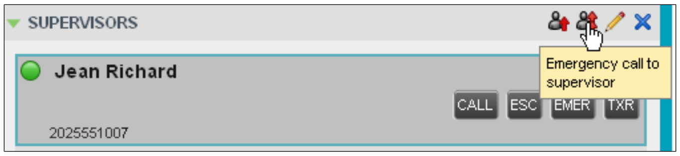


Figure 37 Supervisors Panel – Making Emergency Call

This places the call to the first available supervisor. When the supervisor answers the emergency call, a Three-Way call or an N-Way call is started, without putting the caller on hold.

2) To transfer the call to the supervisor, click **Leave Conference** in the *Conference Call* panel after the conference is established.

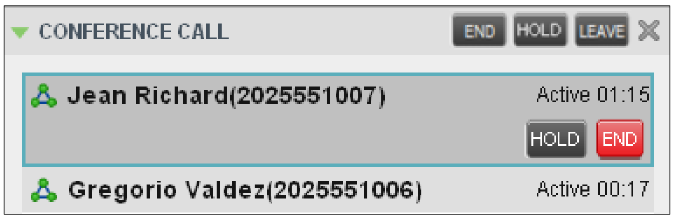


Figure 38 Conference Call Panel – Leave Conference

To make an emergency call to a specific supervisor:

1) While on a call, expand the *Supervisors* panel.

2) Click the target supervisor and click the **Emergency** button for that supervisor. Make sure the supervisor you selected is available.

   Alternatively, drag the call onto the target supervisor and click the **Emergency** button for that supervisor.

This places the call to the selected supervisor. When the supervisor answers the emergency call, a Three-Way call or an N-Way call is started, without putting the caller on hold.

3) To transfer the call to the supervisor, click **Leave Conference** in the *Conference Call* panel after the conference is established.

6.8.2 Blind Escalate Call

Use this method to escalate a call to a supervisor without consulting the supervisor. You can escalate a call to the first available supervisor or select the supervisor yourself.

To blind escalate a call:

1) In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click the **Escalate** button for that supervisor. Your original call is placed on hold and a call to the supervisor is initiated.

2) Without waiting for the supervisor to answer, in the *Call Console*, select the original call.

3) Move the mouse over the call to the supervisor and click **Transfer** .

6.8.3 Escalate with Consultation

Use this method to escalate a call to a supervisor and provide an introduction beforehand. You can escalate the call to the first available supervisor or select the supervisor yourself.

To escalate a call with consultation:

1) In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click **Escalate** ESC for that supervisor.
2) Wait until the supervisor accepts your call and speak to the supervisor.
3) When ready to transfer the call, in the *Call Console*, select the original call.
4) Move the mouse over the call to the supervisor, and click **Transfer** TXR.

6.8.4 Escalate with Conference or Handover

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

To escalate a call with conference or handover:

1) In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click **Escalate** ESC for that supervisor.
2) When the supervisor accepts your call, speak to the supervisor about the issue.
3) In the *Call Console*, select the original call.
4) Move the mouse over the call to the supervisor and click **Conference** CONF. A conference call is established and the calls appear in the *Conference Call* panel.
5) To hand the call over to the supervisor, click **Leave Conference** LEAVE in the *Conference Call* panel.

6.8.5 Escalate with Mid-Conference Hold

Use this method to escalate a call to a supervisor through a conference call and provide an opportunity for the customer to speak to the supervisor.

To escalate a call with mid-conference hold:

1) In the *Supervisors* panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click **Escalate** ESC for that supervisor.
2) When the supervisor accepts your call, speak to the supervisor about the issue.
3) In the *Call Console*, select the original call.
4) Move the mouse over the call to the supervisor and click **Conference** CONF.

   A conference call is established and the calls appear in the *Conference Call* panel.
5) In the *Conference Call* panel, click **Hold Conference** HOLD. This puts both calls on

hold but allows the customer and the supervisor to continue their conversation.

6) To drop a specific party from the conference, select their call from the *Conference Call* panel and click **End** 

.

7) To leave the call, click **Leave Conference** 

in the *Conference Call* panel.

6.9 Manage Conference Calls

You manage conferences in the *Call Console*. You use the:

- Current calls area to establish a conference and add participants to it.
- *Conference Call* panel to manage or end an active conference call.

You can only have one active conference at a time.

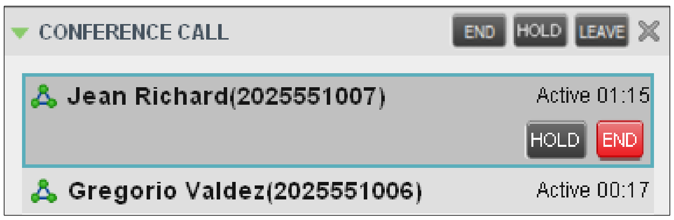


Figure 39 Call Console – Conference Call Panel

> **NOTE**: To start conference calls, you must have the Three-Way Call or N-Way Call service assigned.

6.9.1 Start Three-Way Conference

To start a conference call, you must have at least two current calls. The calls can be received or made by you. If required, make calls using any of the methods described in section *6.5 Make Outbound Calls*.

To start a conference:

1) In the *Call Console*, select a call.

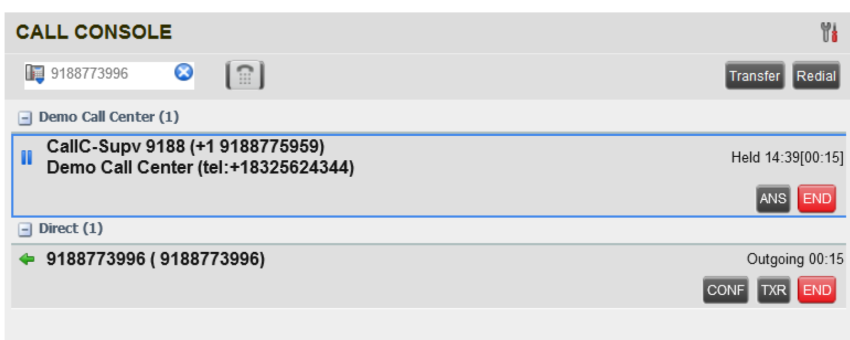


Figure 40 Call Console – Starting Conference Call

2) Move the mouse over a call that is not selected and click **Conference** 

. A Three-Way Conference is established and the connected calls appear in the *Conference Call* panel.

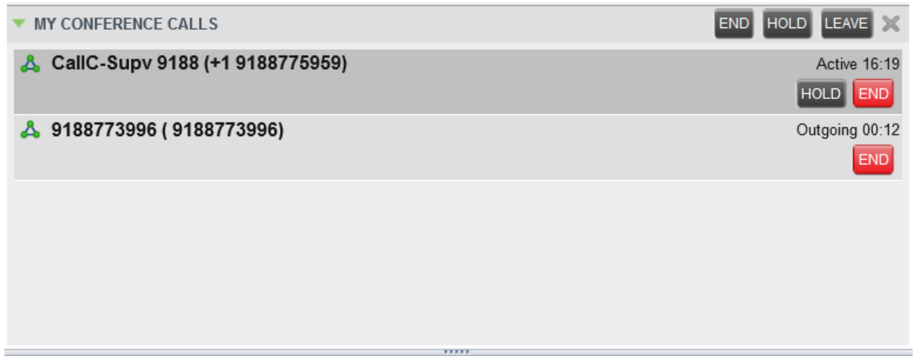


Figure 41 Conference Call Panel – Conference Call

6.9.2 Add Participant to Conference

NOTE: To add participants to a conference, you must have the N-Way Calling service assigned.

To add a participant to a conference:

1) If the call you want to add to the conference is not yet established, place the call.
2) In the *Call Console*, move the mouse over the call and click **Conference** CONF. The call is added to the conference.

6.9.3 Hold Conference

To put an active conference on hold:

In the *Conference Call* panel, click **Hold Conference** HOLD. This allows other conference participants to continue their conversation.

6.9.4 Resume Conference

To resume a conference call that you previously put on hold:

In the *Conference Call* panel, click **Resume Conference** ANS. All the calls in the conference become active.

6.9.5 Hold Participant

To put a specific conference participant on hold:

1) Expand the *Conference Call* panel.
2) Move the mouse over the target call and click **Hold** HOLD.

6.9.6 Take Participant Off Hold

To resume a participant's held call:

1) Expand the *Conference Call* panel.
2) Move the mouse over the target call and click **Answer** ANS.

6.9.7 Leave Conference

To leave the conference:

In the *Conference Call* panel, click **Leave Conference** . The other parties continue their conversation.

NOTE: This function is only available for Three-Way Conferences.

6.9.8 End Participant

To end a selected call in a conference:

1) Expand the *Conference Call* panel.
2) Move the mouse over the call and click **End** .

6.9.9 End Conference

To end the conference:

In the *Conference Call* panel, click **End Conference** . This releases all the calls that participated in the conference.

7 Manage Contacts

You use the *Contacts* pane to perform call and monitoring operations on your contacts as well as to manage your contacts' directories.

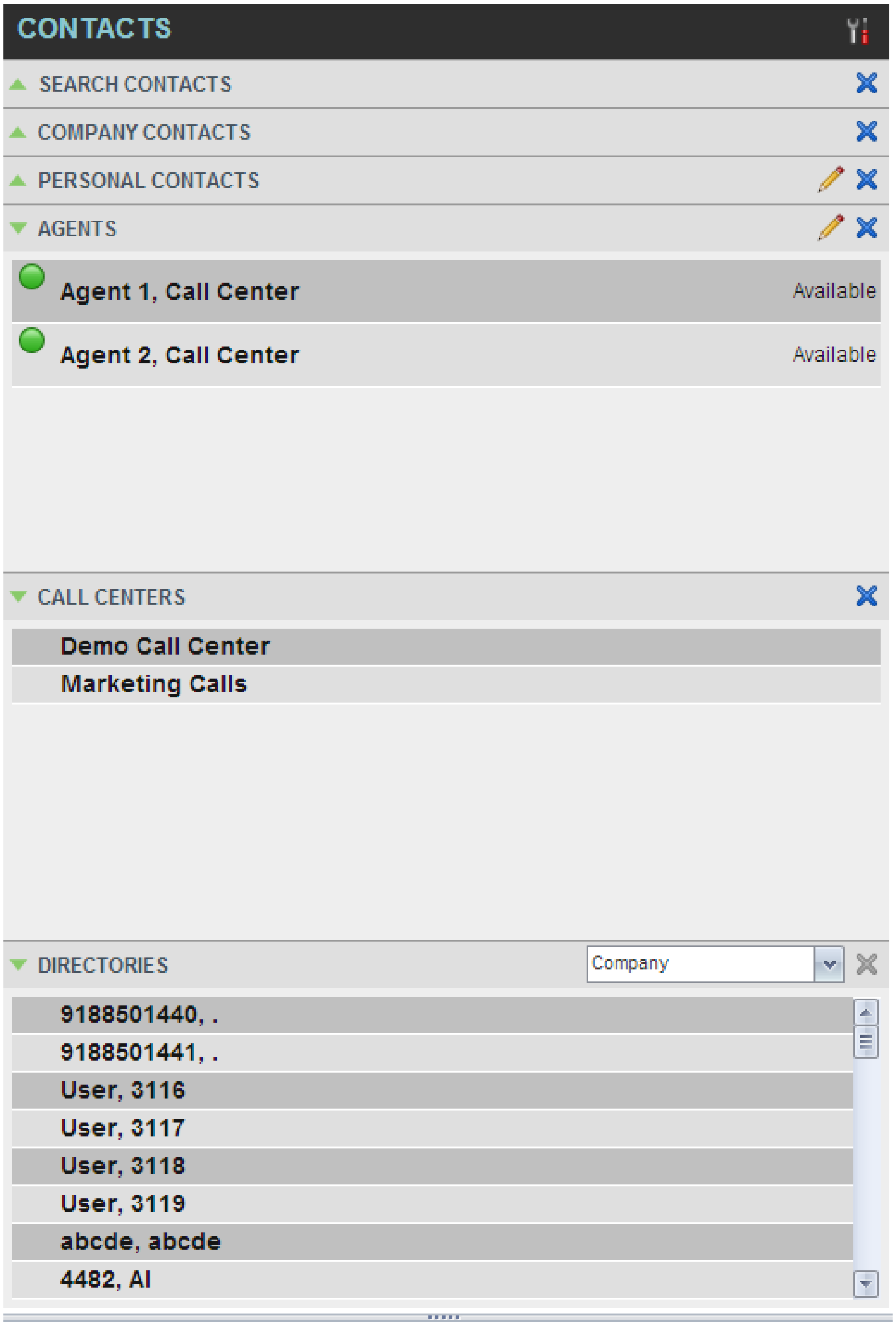


Figure 42 Contacts Pane

Call Center provides access to the contacts' directories listed in the following table.

Interface Element	Description

Interface Element	Description
Company Contact	The *Company Contacts* directory contains the contacts in your XO Hosted PBX.
Personal Contacts	The *Personal* directory contains all contacts in your Personal Phone List on XO Hosted PBX.
Supervisors	The *Supervisors* directory, available only to agents, contains the list of your supervisors and allows you to view their phone state.
Call Centers	The *Queues* directory lists the call centers and associated DNIS numbers for the call centers you are either supervising or staffing. It allows you to transfer calls to queues quickly.
Outlook	The *Outlook* directory contains your Outlook contacts.
LDAP (Search Access Only)	Call Center provides search access to a configured *LDAP* directory. When you make a search on the *LDAP* directory and your search returns results, these results are displayed in the *Search* panel (in the *Contacts* pane). By default, no LDAP contacts are displayed in the *Contacts* pane.

Access to certain directories depends on your permissions and the system setup. For information, contact your administrator.

The *Contacts* pane also contains the *Directories* panel, which consolidates the contacts from the following directories: *Company*, *Personal*, *Outlook*, and *Speed Dial.* The *Contacts* pane is always visible. You can choose which directories to display in the *Directories* panel and you can collapse the panel, but you cannot close it.

For information about the operations you perform to manage your contact directories, see the following sections:

- View Contacts
- Organize Contacts
- Search for Contacts

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7.1 View Contacts

Call Center allows you to select directories to display in the *Contacts* pane, show or hide directory contents, and select the order of appearance for information in certain directories.

7.1.1 Show or Hide Directories

You can decide which of the directories that you are allowed to access appear in the *Contacts* pane.

All directories can be displayed individually in the *Contacts* pane.

In addition, you can decide which directories to display in the *Directories* panel (on their own or with other directories), and below the *Call Console*.

To display or hide a directory in the Contacts pane:

1) In the *Contacts* pane, click **Options** .

2) Select *View*, *Directories*, and then select or unselect the directory to display/hide. To display all directories, select *All*.

   To hide a directory, you can also click the **Close** button  for that directory.

NOTE: You cannot close the *Directories* panel.

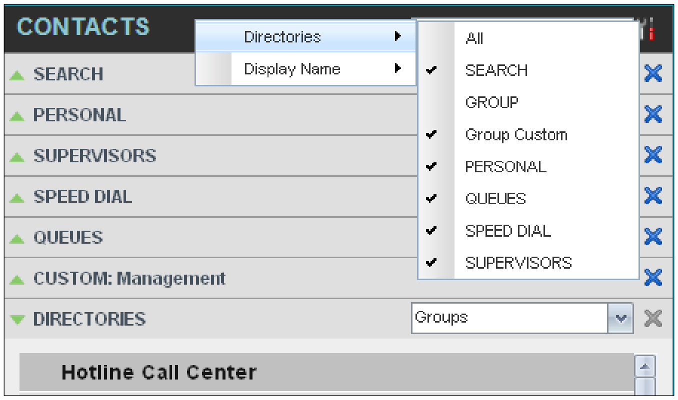


Figure 43 Contacts Pane – Show/Hide Contact Directories

To display a directory in the Directories panel:

In the *Directories* panel, select the directory to display from the drop-down list. To display all directories, select *Show all*.

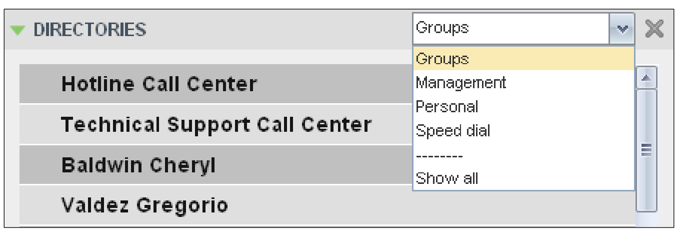


Figure 44 Directories Panel – Selecting Directory to Display

To display a directory below the Call Console:

1) In the *Directories* panel, select *Show all*.

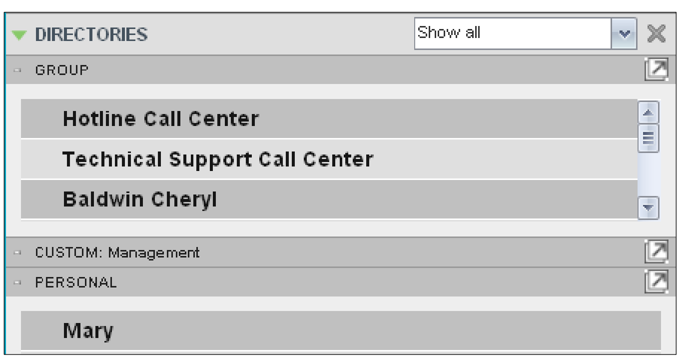


Figure 45 Directories Panel – Selecting Directory

7.1.2 Show or Hide Directory Content

By default, your directories are collapsed, with only the title bar visible. You can selectively expand the directories that you want to consult or use.

To show or hide contacts in a directory:

In the *Contacts* pane, click the **Expand/Collapse**  button for that directory.

Figure 46 Group Panel Expanded

7.1.3 Show Contact Details

You can view the details of a contact in any directory.

To view contact details:

1) Expand the target directory.

2) Click the contact. The entry expands, displaying the contact's details. The information depends on the target directory and includes the contact's phone numbers and action buttons.

   Only one contact per directory can be expanded at a time. When you click a contact, the system automatically hides the details of the previously expanded contact.

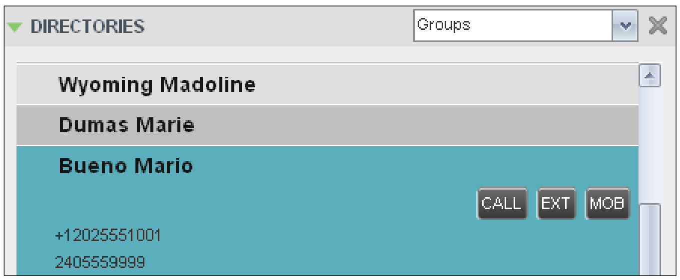


Figure 47 Group Panel – Contact Details

7.1.4 Select Display Order

Contacts in the *Company Contacts, Personal Contact*, *Agents*, and *Supervisors* directories can be displayed by either their first name or last name first. Your selection applies to all of these directories. You cannot specify the display order for each directory individually.

To specify the contacts' display order:

1) In the *Contacts* pane, click the **Options** button  .

2) Select *View*, then *Display Name*, and then the order in which you want to display the contacts: *Last Name, First Name* -or- *First Name, Last Name*.

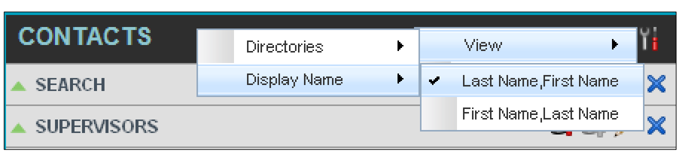


Figure 48 Contacts Pane – Displaying Contacts by First Name, Last Name

Figure 49 shows supervisors displayed by their last name followed by their first name.

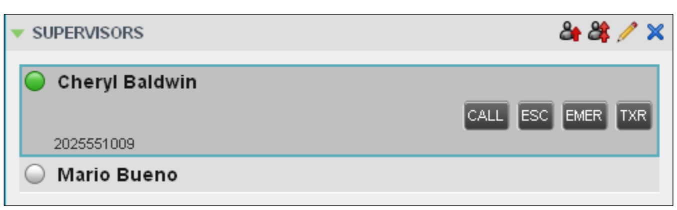


Figure 49 Supervisors Panel – Supervisors Listed by First Name, Last Name

7.2 Organize Contacts

7.2.1 Sort Contacts

You can sort contacts in the following directories: *Company Contacts*, and *Agents*.

To order contacts in a directory:

1) In the *Contacts* pane, click **Options** .

2) Select *Sort*, followed by the name of the directory in which you want to sort contacts, and then the sorting option.

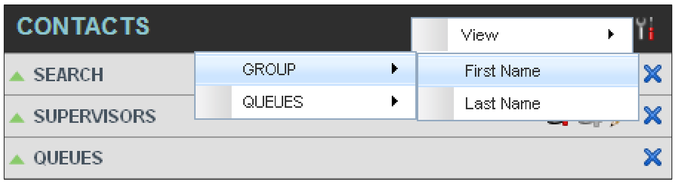


Figure 50 Contacts Pane – Sorting Contacts

Figure 51 shows a *Group* directory sorted by the contact's first name.

Figure 51 Group Panel – Contacts Sorted by First Name

NOTE: When agents are sorted by ACD state and there is a change in an ACD state, the agents are not automatically re-sorted.

7.3 Search for Contacts

Call Center provides you with a search function that allows you to search for specific contacts in your directories.

You use the *Search* panel in the *Contacts* pane to look for contacts.

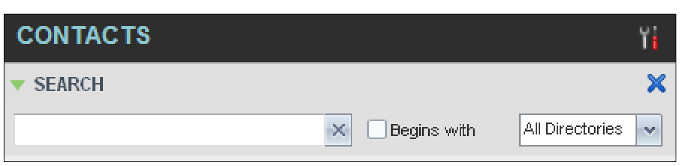


Figure 52 Contacts Pane – Search Panel

7.3.1 Perform Contact Search

To search for contacts:

1) In the *Search* text box, enter the text you want to search for and press ENTER. You can enter partial information, such as part of a name or phone number.

   For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

2) To restrict the search to contacts that start with the entered text, check the *Begins with* box.

3) From the drop-down list, select the directories to search.

4) Press ENTER.

   The text you enter is matched against all attributes of every entry in the selected directories.

> **NOTE**: The search is not case-sensitive; the search for "Ann" and "ann" returns the same results.

   Search results are displayed in the *Search* panel, each contact listed with the name of the directory where they were found.

   XO Hosted PBX directories are searched in the following order: Supervisors, Agents, Company Contacts. Duplicate search results in XO Hosted PBX directories are not displayed; the first match for a given contact is displayed.

   Duplicate search results in other directories are displayed.

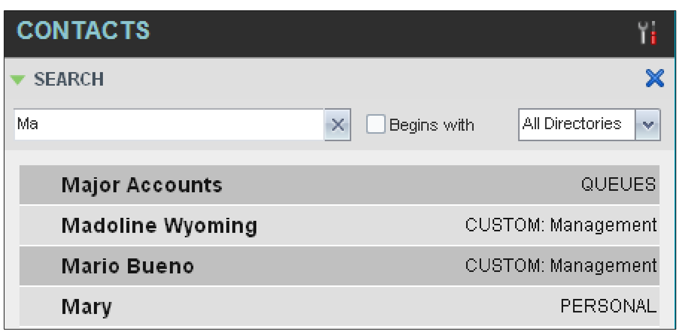


Figure 53 Contacts Pane – Search Results

   The search returns either all the contacts (in the selected directories) that contain the entered keyword or all the contacts that start with the entered keyword.

   In the first case (*Contains*), entering "Ann" and selecting "First Name" from the *Keyword Search Filter* drop-down list returns all contacts with the first name "Ann", but it also returns all contacts with first names such as "Anne", "Marianne", "Marie Ann", "Ann Marie", and so on.

   In the second case (*Starts With*), entering "Ann" and selecting "First Name" returns all contacts with first names such as "Ann", Anne", and Ann Marie", but not "Marianne" or "Mary Ann".

5) To clear the search results, click **Reset** .

> **NOTE**: Contact entries displayed in search results follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

7.4 Manage Personal Contacts

You can add or remove personal contacts via the web portal or in Call Center, and the updates appear in both places. However, the updates that you make via the web portal appear only in Call Center at the next sign-in.

To update personal contacts using the client, perform the following operations:

- Add Personal Contact
- Delete Personal Contact

You cannot modify a personal contact entry in Call Center. To modify information for a personal contact, delete the entry and add it again.

7.4.1 Add Personal Contact

To add a personal contact:

1) In the *Personal* panel, click **Edit** . The *Edit Personal Contact* dialog box appears.
2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

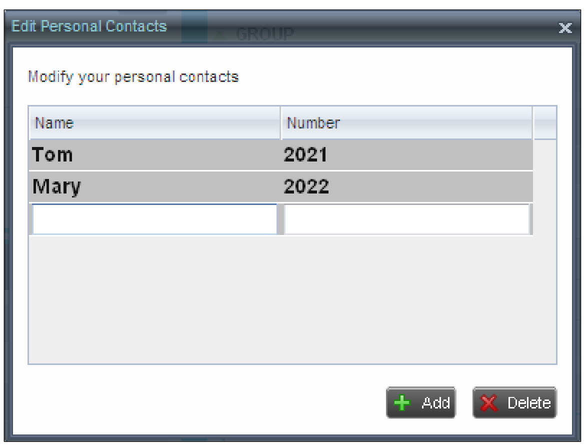


Figure 54 Edit Personal Contact Dialog Box – Adding Entry

3) In the *Name* text box, enter the contact's name or description, as you want it to appear on the contact's list.
4) In the *Number* text box, enter the phone number of the contact.
5) To save the entry, click anywhere in the dialog box outside the entry.

7.4.2 Delete Personal Contact

To delete a speed dial entry:

1) In the *Personal* panel, click **Edit** . The *Edit Personal Contact* dialog box

appears.

2) Select the entry to delete and click **Delete**.

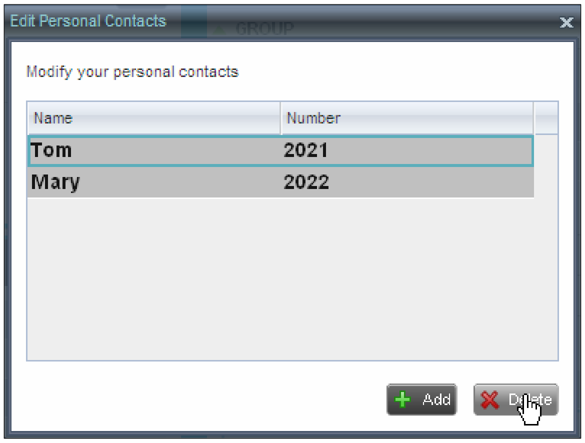


Figure 55 Edit Personal Contact Window – Deleting Entry

8 Monitor Supervisors

Call Center allows you to monitor the phone state of selected supervisors (up to 50). This is useful when you are escalating a call and want to find a supervisor who is available to take a call quickly.

You use the *Supervisors* panel to view the phone state of selected supervisors and to select supervisors to monitor. Supervisors who are not monitored have their state set to “Unknown”.

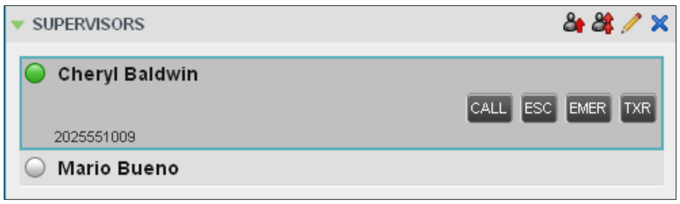


Figure 56 Supervisors Panel

8.1 Select Supervisors to Monitor

The list of selected supervisors is saved when signing out as part of your workspace and is restored on subsequent logins.

To select the supervisors to monitor:

1) In the *Supervisors* panel, click **Edit** . The *Supervisor Favorites* dialog box appears.

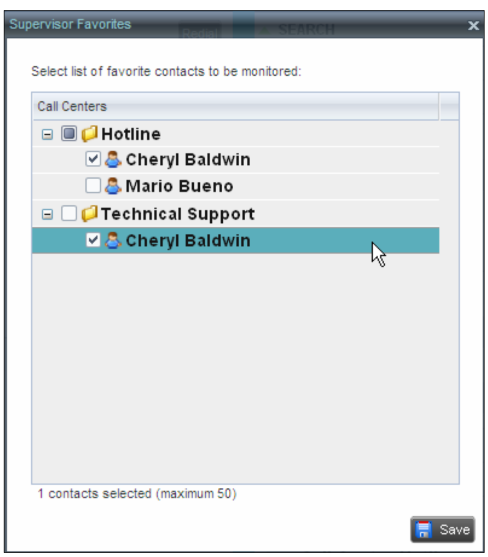


Figure 57 Supervisor Favorites Dialog Box

2) Check the box next to each supervisor to monitor and click **Save**.

8.2 Supervisor Phone States

The following table lists the possible states for a supervisor's phone line:

Phone State	Icon	Description
Idle		Supervisor's phone is on-hook, which means the supervisor is not on a call.
Busy		Supervisor's phone is off-hook, which means that the supervisor is on a call.
Ringing		Supervisor's phone is in alerting state; a call is currently being delivered to the supervisor.
Do Not Disturb		Supervisor has enabled the Do Not Disturb service.
Private		Supervisor has enabled phone state privacy. **NOTE**: This terminates monitoring of the supervisor's phone state for the current login session. To be able to monitor their phone state again, you must sign out and then sign in after the supervisor has disabled their phone state privacy.
Unknown		Supervisor is currently not monitored.

9 Generate Reports

Call Center provides reporting functions to agents. Agents can only generate reports about their own activity.

9.1 Reporting

Reporting provides the Call Center agents historical information about their call center performance which allows them to know their statistical performance as a call center agent. This section provides an example of Reports available. For the list of canned report templates available for report generation as part of Enhanced Reporting, see the *XO Hosted PBX Call Center Reports Guide*.

9.1.1 Run Reports

1) To run a report, click the Reporting link at the top right-hand side of the main window. A Report window appears. Select a report template from the drop-down list. The page displays the input parameters for the report.

Figure 58 Main Window – Reporting Link

2) Select the template for the report you would like to run and fill in the required information.

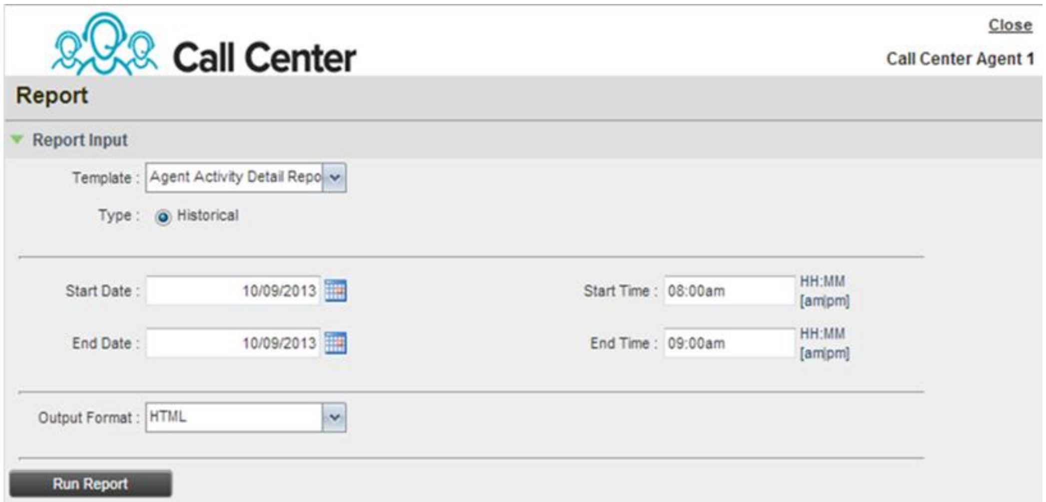


Figure 59 Call Center Report Template Screen

The input that you need to provide depends on the template you select and the report type. The following table explains the input parameters for all Reports.

Input Field	Description	Allowed Value
Scope	For *Agent Reports*, it allows you to specify the agents to include in the report. You can check *All Agents* or *Agents*. If you check *Agents*, select agents from the drop-down list. **NOTE**: This parameter is disabled when an agent runs the report, since agents can only run reports about themselves.	All Agents, Agents
	For *Call Center Reports*, it specifies the call centers or DNIS numbers to include in the report. You can check *All Call Centers, Call Center,* or *DNIS*. ▪ If you check *Call Center*, select call centers from the drop-down list. ▪ If you select *DNIS*, select a call center and DNIS numbers from the drop-down lists. For *DNIS* you can also select *ALL DNIS.*	All Call Centers, Call Center, DNIS
Call Completion	This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to “1” through “7200” seconds.	1 through 72000
Short Duration	This setting is used to count the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to “1” through “7200” seconds.	1 through 7200
Service Level	This setting allows you to provide up to five service levels, used to perform service-level calculations for each call center or DNIS. Each service level can be set to “1” through “7200” seconds.	1 through 7200
Service Level Options	These settings are used to determine whether certain types of calls should be included in the service-level calculations: ▪ Check *Include overflow time transfers in service level* to include calls transferred due to time overflow. ▪ Check *Include other transfers in service level* to include	These options can be checked or unchecked.

Input Field	Description	Allowed Value

	calls transferred for other reasons.
	▪ Select one of the following options for abandoned calls:
	  ▪ *Exclude Abandoned Calls* to exclude all abandoned calls
	  ▪ *Include All Abandoned Calls* to include all abandoned calls
	  ▪ *Include All Abandoned Calls Except Before Entrance Completes* to include calls abandoned after the entrance message has finished playing
	  ▪ *Include Abandoned Calls Except in Defined Interval* to include calls abandoned after the time specified by the abandoned call interval parameter.	

Abandoned Call Interval	If you selected the *Include Abandoned Calls Except in Defined Interval* option, enter the desired interval in this text box in seconds.	1 through 7200
Service Level Percentage	This setting allows you to specify the service-level objective (expressed as a percentage of calls).	
Type	This can be checked as *Historical* or *Real time*. ▪ Historical reports show data from the assigned start date to the assigned end date. ▪ Real-time reports show data from the assigned start date to the present, with the current interval refreshed with real-time data. Real-time reports for individual agents contain data for each time interval, with the last interval reflecting real-time data, if requested (subject to the refresh rate). When the interval switches over, the final data for the last time period is captured and shown as historical data and real-time data is reflected in the new time interval.	Historical or Real time
Start Date	This is the date when you want the report to start. It can be set by typing in the text box or clicking the Calendar icon. This is compulsory. The oldest historical date depends on the interval selected: ▪ 180 days of half-hour interval statistics ▪ 365 days of hourly interval statistics ▪ 730 days of daily interval statistics	MMM DD, YYYY
Start Time	This is the time when you want the report to start. You can select the hour format (A.M., P.M., or Military time) from the *Hour Selection Type*. Time is applicable for hourly and minute intervals only.	1:00am through 12:59am, 1:00pm through 12:59pm, or 0:00 through 23:59
End Date	This is the date when you want the report to end. It can be set by typing in the text box or clicking the Calendar icon. This is required when a Historical report is selected.	MMM DD, YYYY
End Time	This is the time when you want the report to end. You can select the hour format (A.M., P.M., or Military time) from the *Hour Selection Type*. Time is applicable for hourly and minute intervals only. This is required when a Historical report is selected.	1:00am through 12:59am, 1:00pm through 12:59pm, or 0:00 through 23:59
Sampling	This sampling period is only applicable to interval-based report templates and determines how the report information is presented. For example, an hourly report displays information for each hour of the report time frame.	15 minutes, 30 minutes, Hourly, Daily, Weekly, Monthly
Output Format	This allows you to specify in what format you would like the report output to be generated. If you select Hypertext Markup Language (HTML) or PDF, the report in displayed in the *Report* window. If you select	PDF, XLS, HTML

Input Field	Description	Allowed Value
	Excel File Format (XLS), a file is created that you can save on your computer.	

3) Click **Run Report.**

The results of the report are displayed in the *Report Output* area of the window. See the following section for an example of an Enhanced Report.

NOTE: Adobe Reader 10.01 has a setting *Enable Protected Mode at startup,* which is enabled by default. If you select the PDF report format and are using Adobe Reader 10.01 (or later, which has this setting), you need to disable the setting; otherwise, report results are not displayed.

To disable the protected mode in Adobe Reader, perform the following steps.

1) Close all opened Internet Explorer and Adobe Reader instances.
2) Open Adobe Reader.
3) From the menu bar, select *Edit* and then *Preferences*. The *Preferences* dialog box appears.
4) From the *Categories* menu on the left, select *General*.

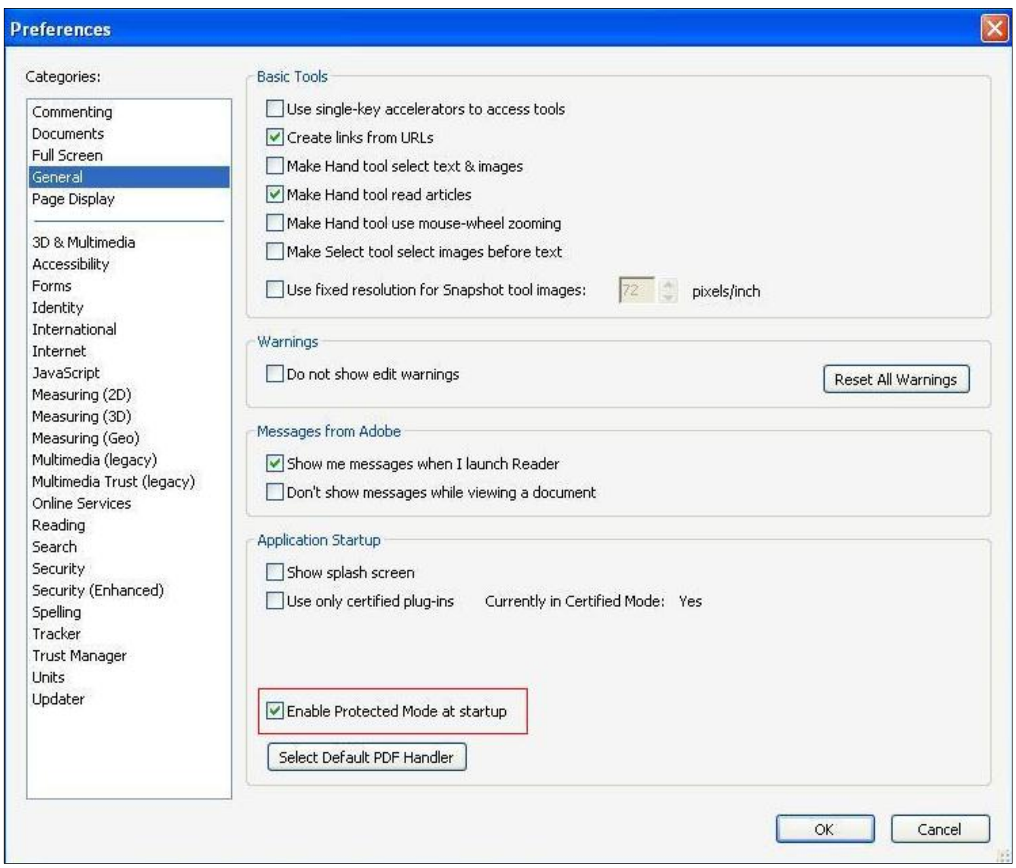


Figure 60 Preferences – General

5) Uncheck *Enable Protected Mode at startup*.

6) Click **OK**.

7) Close Adobe Reader.

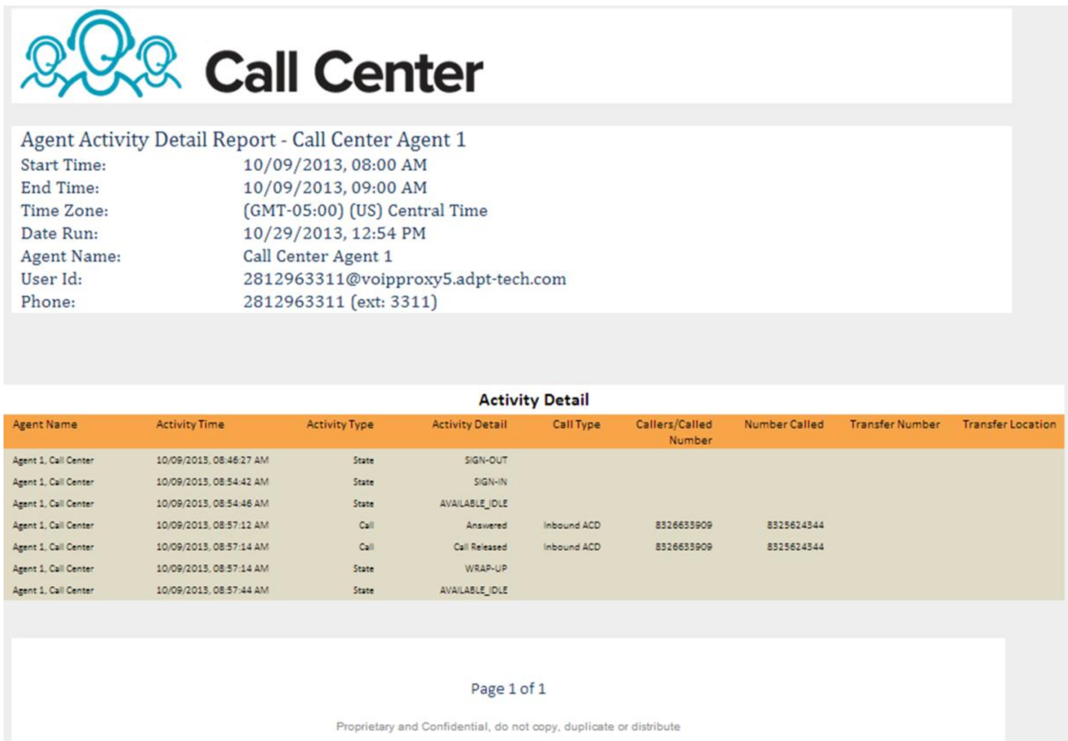
9.1.1.1 Report Results (Example)

Depending on the report type, the report results can contain the following elements: A pie chart, a bar chart, a table, a high-water marks table, and a line chart.

If you select HTML or PDF report format when requesting a report, the report is displayed in the *Report* window. If you select XLS, a file is created that you can save on your computer.

This section provides an example of an Enhanced Report: Agent Activity Report. For more information on the reports available in Call Center, see the *XO Hosted PBX Call Center Reports Guide*.

The results of the Agent Activity Detail Report are presented in a bar chart and table.


Call Center

Agent Activity Detail Report - Call Center Agent 1

Start Time:	10/09/2013, 08:00 AM
End Time:	10/09/2013, 09:00 AM
Time Zone:	(GMT-05:00) (US) Central Time
Date Run:	10/29/2013, 12:54 PM
Agent Name:	Call Center Agent 1
User Id:	2812963311@voipproxy5.adpt-tech.com
Phone:	2812963311 (ext: 3311)

Activity Detail

Agent Name	Activity Time	Activity Type	Activity Detail	Call Type	Callers/Called Number	Number Called	Transfer Number	Transfer Location
Agent 1, Call Center	10/09/2013, 08:46:27 AM	State	SIGN-OUT					
Agent 1, Call Center	10/09/2013, 08:54:42 AM	State	SIGN-IN					
Agent 1, Call Center	10/09/2013, 08:54:46 AM	State	AVAILABLE_IDLE					
Agent 1, Call Center	10/09/2013, 08:57:12 AM	Call	Answered	Inbound ACD	8326633909	8325624344		
Agent 1, Call Center	10/09/2013, 08:57:14 AM	Call	Call Released	Inbound ACD	8326633909	8325624344		
Agent 1, Call Center	10/09/2013, 08:57:14 AM	State	WRAP-UP					
Agent 1, Call Center	10/09/2013, 08:57:44 AM	State	AVAILABLE_IDLE					

Page 1 of 1

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Figure 61 Agent Activity Report

10 Configure Call Center

You use the *Settings* page, accessed via the Settings link at the top right-hand side of the main page to configure various aspects of the Call Center application.

To return to the main interface, click the **Back To Application** link.

NOTE: Do **not** use the internet browser's Back button to return to the main interface.

This section provides information about the options that you can use to configure Call Center.

- Settings – General
- Settings – Application
- Settings – Services
- Settings – Plug-ins**Error! Reference source not found.**
- Settings – Report
- Settings – About

10.1 Settings – General

You use the General tab to configure miscellaneous settings that improve the usability of Call Center.

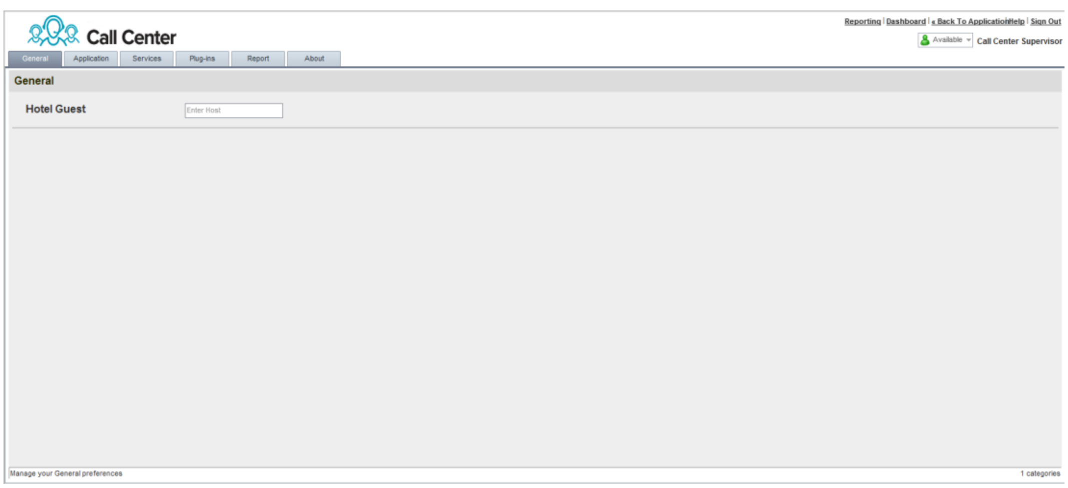

Figure 62 Setting – General

The following subsections describe the settings that can be configured on this page.

10.1.1 Hotel Guest

This setting is not active at this time. It is reserved for future feature enhancements.

10.2 Settings – Application

You use the Application tab to configure your application settings. They are described in the following subsections.

Figure 63 Settings – Application (Agent)

10.2.1 Call Center Memberships

These settings allow you to select the call center queues you wish to join.

1) To join a call center queue, select the check box on the line for the call center.

2) To join all queues, select the check box in the header.

> **NOTE**: If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue, if you are not allowed to do it yourself, contact your administrator.

10.2.2 Agent Policies

You use agent policies settings to specify your post sign-in ACD state, post call ACD state, wrap-up timer, and outbound CLID:

- *Post Sign-In ACD State* – To configure your post sign-in ACD state, select a state from the *Sign-In State* drop-down list. Your ACD state is automatically set to the selected state when you sign in to Call Center.

  If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.

- *Post Call ACD State* – To configure your post call ACD state, that is your ACD state upon completion of a call, select a state from the *Post Call State* list.

  If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.

  In most cases, when you select *Wrap-Up*, you must also configure your wrap-up timer.

- *Make outgoing calls as call center* – Check this box to display a call center CLID instead of your phone number when you make a call.

- *Outbound Caller ID* – If you checked *Make outgoing calls as call center*, select the number to use from the drop-down menu.

- *Set Wrap-Up Timer to* – To set your post call wrap-up timer, check the *Set Wrap-Up Timer to <mm:ss> for queues without a policy* box and enter the time in minutes and seconds. Your ACD state automatically changes from *Wrap-Up* to *Available* after the specified period of time.

> **NOTE**: Your post call wrap-up timer setting may be overridden if your administrator sets the timer to a smaller value in the My Site dashboard.

10.3 Settings – Services

You use the Services tab to configure various services assigned to you by your administrator on the XO Hosted PBX service, which are integrated with Call Center. These settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

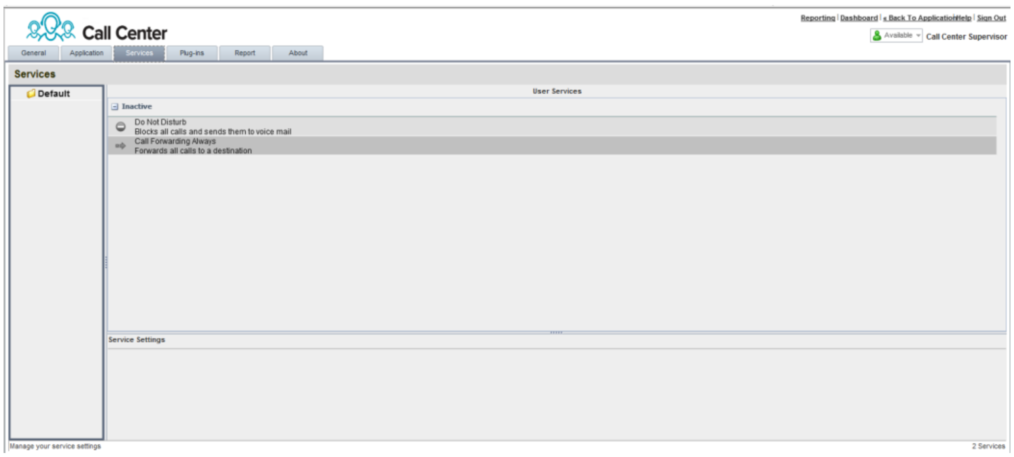

Figure 64 Settings – Services

The services that you can configure (if you have been assigned the services) are:

- *Do Not Disturb* – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.
- *Call Forwarding Always* – When you activate this service, you must provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.

To activate a service:

1) Select the service and check the *Is Active* box. The service is moved from the *Inactive* to *Active* category.
2) If you enabled the Call Forwarding Always service, in the *Forward To* box that appears, enter the number to forward your calls to.
3) To generate a ring splash for incoming calls, check the *RingSplash* option.
4) To save your changes, click **Save**.

10.4 Settings – Plug-ins

You use the Plug-ins tab to configure the plug-in software used by Call Center to provide functionality such call notification, program shortcuts, and call log.

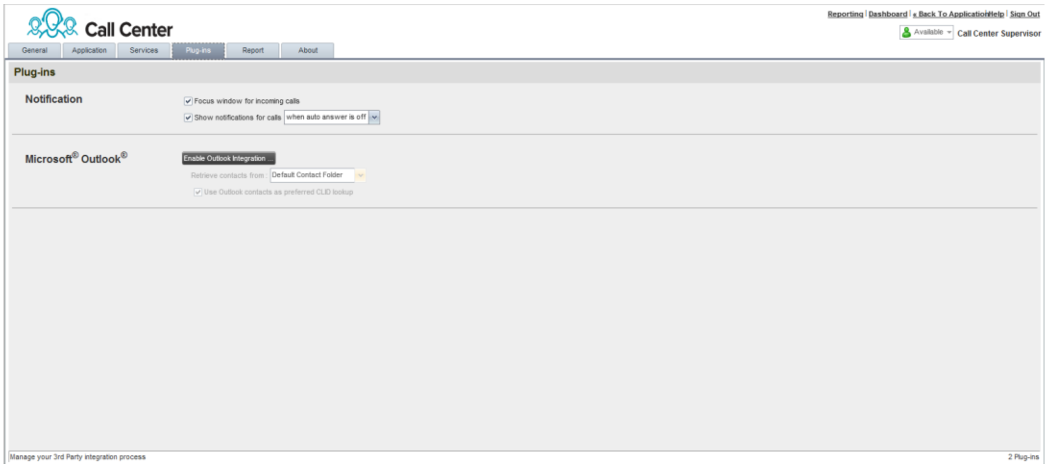

Figure 65 Settings – Plugins

10.4.1 Notification

These options control when and how call notifications are displayed. The options you can set are as follows:

- *Focus window for incoming calls* – When this option is checked and the browser window that is running Call Center is minimized, Call Center automatically restores the window on incoming calls.

  This does not work in Firefox. In Internet Explorer, you must have only one tab open in the web browser running Call Center.

- *Show notification for calls* – When this option is checked, Call Center displays the *Call Notification* pop-up window on top of other applications' windows when you receive a call. When you check this box, you need to select an option from the drop-down list to specify the condition under which notifications are displayed.

  This does not work if other tabs are open in the same web browser window as Call Center. In addition, if calls come within eight seconds of each other, the *Call Notification* pop-up window appears only for the first call of that series.

10.4.2 Microsoft Outlook

The Microsoft Outlook options control Outlook integration with Call Center. They are only visible if Outlook integration is enabled in Call Center.

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Call Center integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from XO Hosted PBX.
- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.
- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Call Center uses Outlook to try to identify a caller, when the caller ID is unknown.

10.5 Settings – Report

You use the Report tab to configure values to be used as default input parameters for generating reports. If you do not provide any values, system defaults are used. You can change these values as required when generating reports.

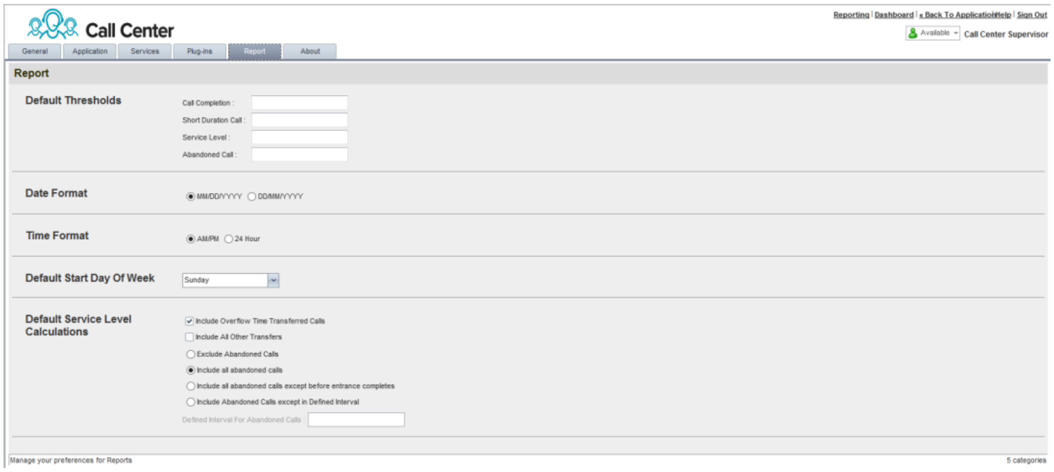

Figure 66 Settings – Report

10.5.1 Default Thresholds

These settings allow you to configure the thresholds that are used by default when you generate reports that require you to provide thresholds. This is useful, if you often use the same threshold values. You can always change a default value, when required.

- *Call Completion* – This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to “1” through “7200” seconds.
- *Short Duration Call* – This setting is used to count the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to “1” through “7200” seconds.
- *Service Level* – Defines in seconds how long it takes to answer calls. A call is said to be within a service level if it is answered within the provided time threshold and the percent (%) in service level is calculated as the number of calls answered within the provided threshold value divided by the number of answered calls.
- *Abandoned Call* - This counts the number of calls abandoned within a specified time threshold. Up to four thresholds can be specified, resulting in up to four different counts. Threshold: 1 through 7200 seconds

10.5.2 Date and Time

The following settings allow you to configure day and time formats used in reports as well as the day of the week to start reports.

- *Date Format* – This setting allows you to select the format for displaying dates in reports. The format is used for all dates that are included in the generated report.
- *Time Format* – This setting allows you to select the format for displaying time in reports. The format is used for all times that are included in the generated report.

  Note that this setting does not impact the format of events durations, which are always reported in the “DD:HH:MM:SS” format in the generated reports.

- *Default Start Day of Week* – This setting applies to interval-based reports, when the selected sampling period is “Weekly”. It can be set to any day of the week.

10.5.3 Default Service-level Calculations

The following settings allow you to configure default settings used to make service-level calculations.

- *Include Overflow Time Transferred Calls* – Check this box to include calls transferred due to time overflow in service-level calculations.
- *Include All Other Transfers* – Check this box to include calls transferred for other reasons that overflow in service-level calculations.
- *Exclude Abandoned Calls* – Check this box to exclude all abandoned calls from service-level calculations.
- *Include all abandoned calls* – Check this box to include all abandoned calls in service-level calculations.
- *Include all abandoned calls except before entrance completes* – Check this box to include calls abandoned after the entrance message has finished playing in service-level calculations.
- *Include Abandoned Calls except in Defined Interval* – Check this box to include calls abandoned after the time specified by the interval for abandoned calls parameter in service-level calculations.
- *Defined Interval for Abandoned Calls* – If you checked *Include Abandoned Calls except in Defined Interval,* enter the desired interval in this text box in seconds. The *Defined Interval for Abandoned Calls* can be set to “1” through “7200” seconds.

10.6 Settings – About

You use the About tab to view the information about Call Center.

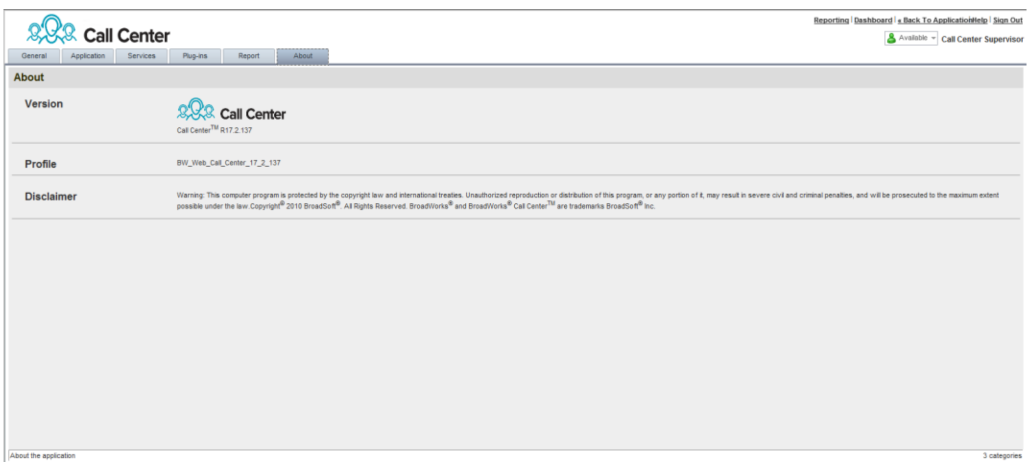

Figure 67 Settings – About

The following information is provided on this page:

- *Version* – This is the name and software version of XO Hosted PBX Call Center client.
- *Profile* – This is the Call Center client profile used.
- *Disclaimer* – This is the Call Center copyright information.

11 Appendix A: Glossary and Definitions

11.1 ACD States

ACD states specify the agent's availability to take calls. The possible call states are those listed in the following table.

An agent can be in one of the ACD states.

ACD State	Icon	Description
Available		Agent is available to receive ACD calls. (Agent can also receive direct calls.) This is the primary ACD state of an agent during the workday. It indicates that the agent is at their workstation and either ready to take a call or on an active call. ACD calls **may** be delivered to an agent who is in an *Available* state. XO Hosted PBX uses both the ACD state **and** the phone state of the agent to determine whether to route a call to the agent. By default, agents receive calls when they are available **and** their phone is *Idle*. However, this behavior can be overridden if Call Waiting on agents is enabled for the call center, which allows for new calls when the agent is available **and** on an active call.
Unavailable		Agent is unavailable to receive ACD calls. (Agent can still receive direct calls.) The *Unavailable* state should be used when the agent is away from their workstation and not available to take calls. ACD calls are not delivered to agents in an *Unavailable* state. This state should be used when the agent is at lunch, on a break, in a meeting, or engaged in some other activity while they are at work, but unavailable to take calls.
Wrap-Up		Agent is performing post call work. This state is designed to allow the agent to complete paperwork or other post call procedures associated with the last call. Calls **may** be delivered to agents in *Wrap-Up* state depending on the call center configuration. By default, calls are not routed to agents in *Wrap-Up* state, except when the call center is configured to enable calls to agents in the *Wrap-Up* state.
Sign-In		The *Sign-In* state is equivalent to a "clock in", which means that the agent is at their work location but not yet ready to accept incoming calls. Calls are not delivered to the agent in this state. *Sign-In* is a transitional state and agents do not remain in this state; rather they transition to their post sign-in state. It is recommended that agents only be in this state between the time they arrive at work and the time they become available to accept calls.
Sign-Out		The *Sign-Out* state is equivalent to a "clock out", which means that the agent's workday or shift is completed and they are leaving. Calls are not delivered to the agent in this state. It is recommended not to use this state when agents leave for lunch or breaks during the day. The *Unavailable* state should be used for that.

In Call Center, an agent can only set their ACD state to "Available", "Unavailable", or "Wrap-Up". A supervisor can set the ACD state of an agent to "Available", Unavailable", Wrap-Up", or Sign-Out".

The *Sign-In* state can only be assigned to an agent through the web portal.

11.2 Phone States

Phone states show the state of the monitored agent's telephone line or the supervisor's telephone line.

The supervisors' phone states are displayed as follows:

Phone State	Icon	Description
Idle		Supervisor's phone is on-hook, which means the supervisor is not on a call.
Busy		Supervisor's phone is off-hook, which means that the supervisor is on a call.
Ringing		Supervisor's phone is in *alerting* state; a call is currently being delivered to the supervisor.
Do Not Disturb		Supervisor has enabled the Do Not Disturb service.
Private		Supervisor has enabled phone status privacy. **NOTE**: This terminates monitoring of the supervisor's phone state for the current login session. To be able to monitor their phone state again, you must sign out and then sign in after the supervisor has disabled their phone state privacy.
Unknown		Supervisor is currently not monitored.

The agents' phone states are combined with their ACD states and are displayed as follows:

Phone State	ACD State	Icon	Description
Idle	*Available*		Agent's phone is on-hook and the agent is available to take ACD calls.
Ringing	*Available*		Agent's phone is ringing and the agent is available to take the call.
Any	*Unavailable, Sign-In, Sign-Out*		Agent is not available to take ACD calls.
Idle, Ringing	*Wrap-Up*		Agent is performing post call work. They may or may not be available to take calls.
Busy	*Available, Wrap-Up*		Agent's phone is off-hook, which means that the agent is on a call. Calls **may** be delivered to agents depending on their call waiting settings and the call center's call waiting and wrap-up settings.
Do Not Disturb	Any		Agent has enabled the Do Not Disturb service. ACD calls are not delivered to an agent in the *Do Not Disturb* call state. This state is **not recommended** for Call Center agents. Agents should use the *Unavailable ACD* state when they need to block new incoming calls temporarily.
Call Forwarding Always	Any		Agent has enabled the Call Forwarding Always service.

Phone State	ACD State	Icon	Description
Private	Any		Agent has enabled phone status privacy. **NOTE**: This terminates monitoring of the agent's phone state for the current login session. To be able to monitor their phone state again, you must sign out and then sign in after the agent has disabled their phone state privacy.
Unknown	Any		Agent is currently not monitored.

11.3 Call States

Call states are the states that your current calls can be in. They are as follows:

Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Local)	Incoming Local		Click To Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, End, Conference
On Hold	Held		Any	Transfer, Resume, End, Conference
On Hold (Remote)	Held		Any	Transfer, Hold, End, Conference
Active (In Conference)	Active		Conference	Transfer, Hold, End
On Hold (In Conference)	Held		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Call Recalled		Terminator	Answer, Conference, End

11.4 Call Types

This section defines different types of calls measured in call center statistics.

Name	Description
ACD Call	This is a call delivered to a call center pilot number that is directed to an agent via the ACD function.
Inbound Call	This is a direct call to an agent. Other calls treated as inbound calls include: ▪ Calls that a supervisor retrieves from a queue ▪ Calls that an agent receives due to a transfer from another agent (Note that they may have originated as ACD calls.)
Outbound Call	This is an outbound call made by an agent.

Name	Description
Held Call	This is an ACD call that was placed on hold by an agent. Each time an agent places a call on hold, it is counted as a held call.
Transferred Call	This is an ACD call that was transferred to another number. Transfers can be the result of manual transfers by agents, transfers to voice mail because the calls were timed out, and transfers by supervisors to alternate queues. **NOTE**: A timed-out call is a call that is transferred due to exceeding the maximum wait time in a queue.
Answered Call	This is an ACD call that was answered by an agent.
Abandoned Call	This is an ACD call that entered the queue, but the caller hung up before the call was answered or transferred.
Received Call	This is an ACD call that was received and either answered or abandoned. Overflowed calls are not included.
Overflowed Call	This is an ACD call that was received, but immediately transferred to another destination due to the queue's exceeding the configured maximum queue size or the configured maximum wait time.
Queued Call	This is an ACD call that is not immediately diverted using the Night Service, Holiday Service, Forced Forwarding, or Overflow, and goes to a queue to be distributed to an agent or to wait for an available agent.
Bounced Call	This is a call that has been transferred back to queue because it was not answered by an agent in the specified time.
Stranded Call	This is a call that is in a queue after all agents assigned to the queue have moved to the *Sign-Out* ACD state.

12 Appendix B: Keyboard Shortcuts

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

Key	Equivalent Mouse Action	Description
ESC	Click the **Close** button in a dialog box.	This closes the open dialog box.
ESC	Cancel the changes.	This exits the currently selected editable item, such as a text box.
/	Click the *Dialer* text box.	This places the cursor in the *Dialer* text box; it retains the currently selected item (if applicable). **NOTE**: In Internet Explorer 8, the "/" shortcut key does not always work. Pressing the key clears the default *Enter Number* text, but does not place the cursor in the input box.
?	Click the *Search* text box.	This places the cursor in the *Search* text box; it retains the currently selected item (if applicable).
ARROW DOWN	Click the scroll bar or the next item on a list.	This selects the next item in the *Call Console* or the *Queued Calls* pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the *Call Console* or the *Queued Calls* pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the *Call Console* or the *Queued Calls* pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the *Call Console* or the *Queued Calls* pane.
1….9	Select a call in the *Call Console*.	Pressing **1** selects the first call, pressing **2** selects the second call, and so on.
SPACEBAR	Click **Answer** on the selected incoming call in the *Call Console*.	This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold.
<PERIOD>	Click **End** on the selected call in the *Call Console*.	This ends the selected call.
ENTER	Click **Dial**.	If the cursor is placed in the *Enter Number* text box in the *Dialer*, the entered digits are dialed.
ENTER	Click **Search**.	If the cursor is placed in the *Search* text box, a search is performed.
+	Click **Transfer** in the *Dialer*.	This transfers the selected call to the ad hoc number entered in the *Dialer*.
SHIFT+1..9	Select a ringing call and click **Answer**.	Pressing **SHIFT+1** selects and answers the first ringing call, pressing **SHIFT+2** selects and answers the second ringing call, and so on.
SHIFT+1..9	Select an active call and click **Hold**.	Pressing **SHIFT+1** selects and places on hold the first active call, pressing **SHIFT+2** selects and answers the second active call, and so on.
SHIFT+1..9	Select a held call and click **Retrieve**.	Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on.
S or s	Click the **Settings** link.	This goes from the main page to the *Settings* page.

B or b	Click the **Back to Application** link.	This goes back from the *Settings* page to the main page.
R or r	Click the **Call History** button.	This opens the *Call History* dialog box.
H or h	Click the **Help** link.	This opens this guide in a PDF format.
SHIFT+L or SHIFT+l	Click the **Sign Out** link.	This signs the user out of the application.
SHIFT+A	Select *Available*	This sets the agent's ACD state to "Available".
SHIFT+U	Select *Unavailable*.	This sets the agent's ACD state to "Unavailable".
SHIFT+W	Select *Wrap-Up*	This sets the agent's ACD state to "Wrap-Up".

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