Feature Overview

Large and small businesses are looking for every efficiency they can, while being as responsive to their customers as possible. One tool commonly employed is sharing resources across a team of people to achieve a common goal, or creating pools of people performing a common task – Sales, Customer Services, etc. For this strategy to work, the phone system needs to reflect this team approach.

Hunt Groups allow a defined group of users to handle incoming calls received by an assigned Hunt Group's phone number. Call Centers add another dimension by providing an automated "answer" for all calls, with customizable greetings, comfort messages, and hold music for the caller to hear while held in a network based queue until an agent (assigned user) is available to pick up the call.

To complement the network based call queuing functionality, the XO Hosted PBX Call Center service provides additional functionality which may meet the requirements better for Call Centers that need more routing functionality, more detailed reporting and web-based tools. Specific features in Call Center that are not in the Call Queue product:

> Expanded Call States – In addition to bounced calls, Call Center provides routing definition for overflow, stranded, and after hours calls.
>
> Supervisor Role - Provides the role of a supervisor that can monitor the status of agents, provide an emergency and escalation path for agents, participate as an agent to receive calls, move the position of callers waiting in queue, view the current activity in the Dashboard and view reports.
>
> Software Clients – Web-based clients which allow agents and supervisors to log into the call center, change status, click to dial, click to answer, put a call on hold, transfer the call, initiate a conference call, and access to company and personal phone directories.
>
> DNIS Support – Dialed Number Information Service (DNIS) enables a call center to support multiple inbound phone numbers using the same routing logic. Each DNIS can have unique a Caller ID and announcements which allows the call center to know which number was dialed which can be used to customize the greeting to the caller.
>
> Enhanced Reports – In addition to call statistics, provides detailed reporting about agent and supervisor activity as well as DNIS level details.

Feature Prerequisites

Before the Call Center service can be used the following conditions must be met:

- At least one 2 Way DID must be assigned to the Call Center and active
- There must be at least one Call Center Agent seat in inventory at the site
- At least one Agent must be assigned to the Queue and signed in as available.
- Call Center Agents and Supervisors must have a Premium station type.

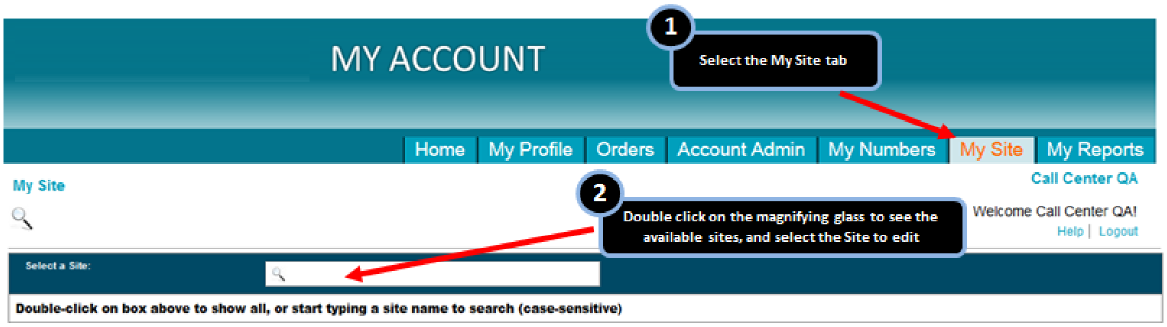
Call Center Notes:

- *User features such as Call Forwarding do not invoke on calls to users through the Call Center*
- *All announcements and music on hold must be formatted as CCIT u-Law 8.000kHz, 8 bit Mono .WAV*

Feature Setup

Prior to using the Call Center service, the Site administrator must set up the Call Center with basic configuration information and agents. Optional configurations can be made to fine tune the service to meet specific requirements. Once logged into to My Account, simply follow the steps detailed below.

Step 1. Go to My Site



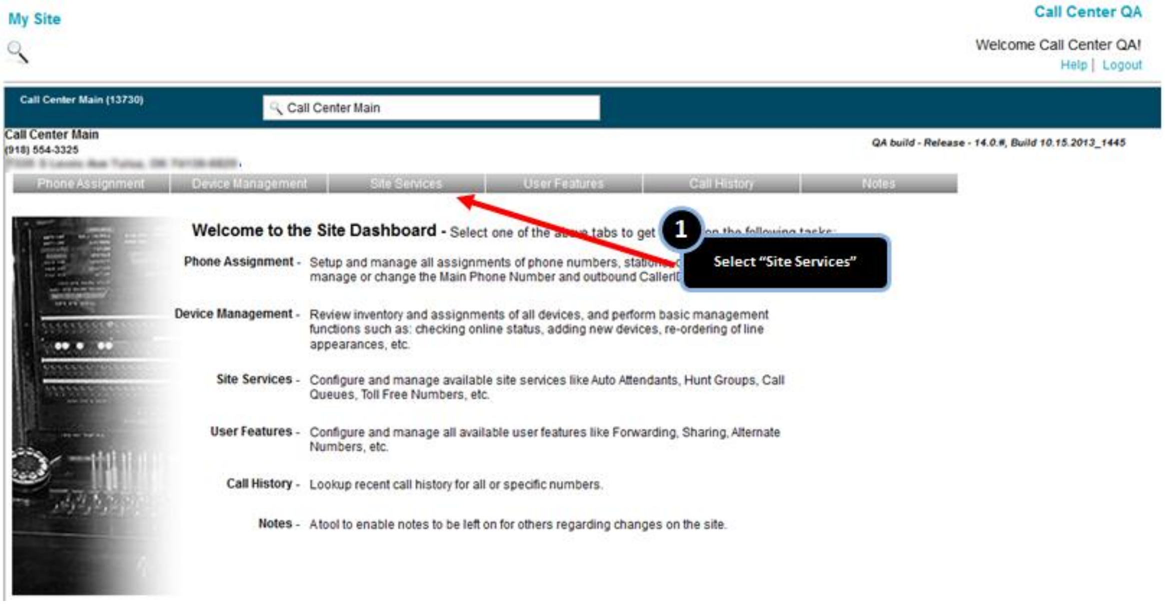
MY ACCOUNT
Home
My Profile
Orders
Account Admin
My Numbers
My Site
My Reports
My Site
Call Center QA
Welcome Call Center QA!
Help | Logout
Select a Site:
1
2

Select the My Site tab

Double click on the magnifying glass to see the available sites, and select the Site to edit

Double-click on box above to show all, or start typing a site name to search (case-sensitive)

Step 2. Go to Site Services



My Site
Call Center QA
Welcome Call Center QA!
Help | Logout
Call Center Main (13730)
Call Center Main
Call Center Main
(918) 554-3325
QA build - Release - 14.0.#, Build 10.15.2013_1445
Phone Assignment
Device Management
Site Services
User Features
Call History
Notes
1

[redacted]

Select "Site Services"

Welcome to the Site Dashboard - Select one of the above tabs to get on the following tasks:

Phone Assignment - Setup and manage all assignments of phone numbers, statio manage or change the Main Phone Number and outbound CallerID

Device Management - Review inventory and assignments of all devices, and perform basic management functions such as: checking online status, adding new devices, re-ordering of line appearances, etc.

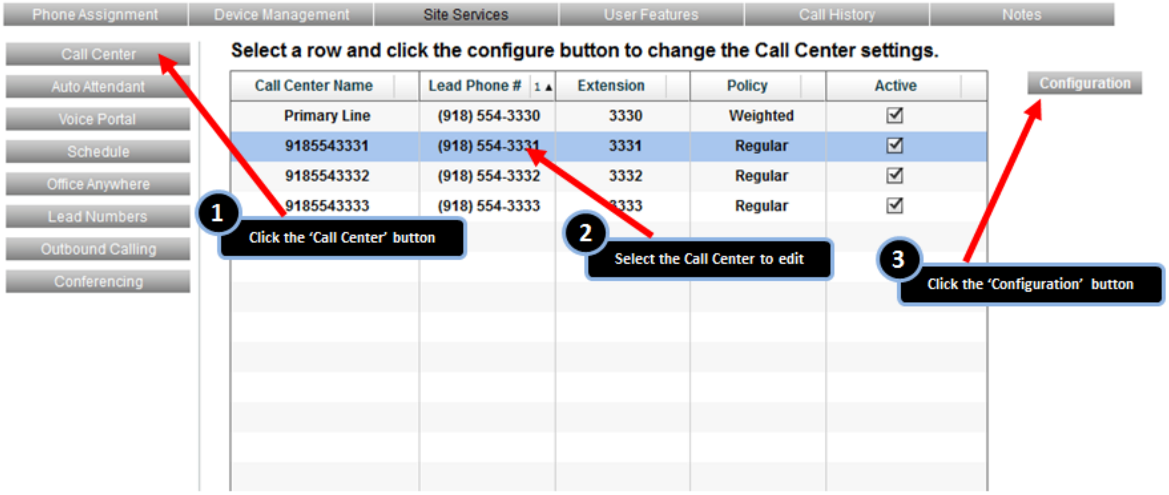
Site Services - Configure and manage available site services like Auto Attendants, Hunt Groups, Call Queues, Toll Free Numbers, etc.

User Features - Configure and manage all available user features like Forwarding, Sharing, Alternate Numbers, etc.

Call History - Lookup recent call history for all or specific numbers.

Notes - A tool to enable notes to be left on for others regarding changes on the site.

Step 3. Select the Call Center to Configure



Phone Assignment
Device Management
Site Services
User Features
Call History
Notes
Call Center
Auto Attendant
Voice Portal
Schedule
Office Anywhere
Lead Numbers
Outbound Calling
Conferencing
Configuration
1
2
3

Select a row and click the configure button to change the Call Center settings.

Call Center Name	Lead Phone #	Extension	Policy	Active
Primary Line	(918) 554-3330	3330	Weighted	☑
9185543331	(918) 554-3331	3331	Regular	☑
9185543332	(918) 554-3332	3332	Regular	☑
9185543333	(918) 554-3333	3333	Regular	☑

Click the 'Call Center' button

Select the Call Center to edit

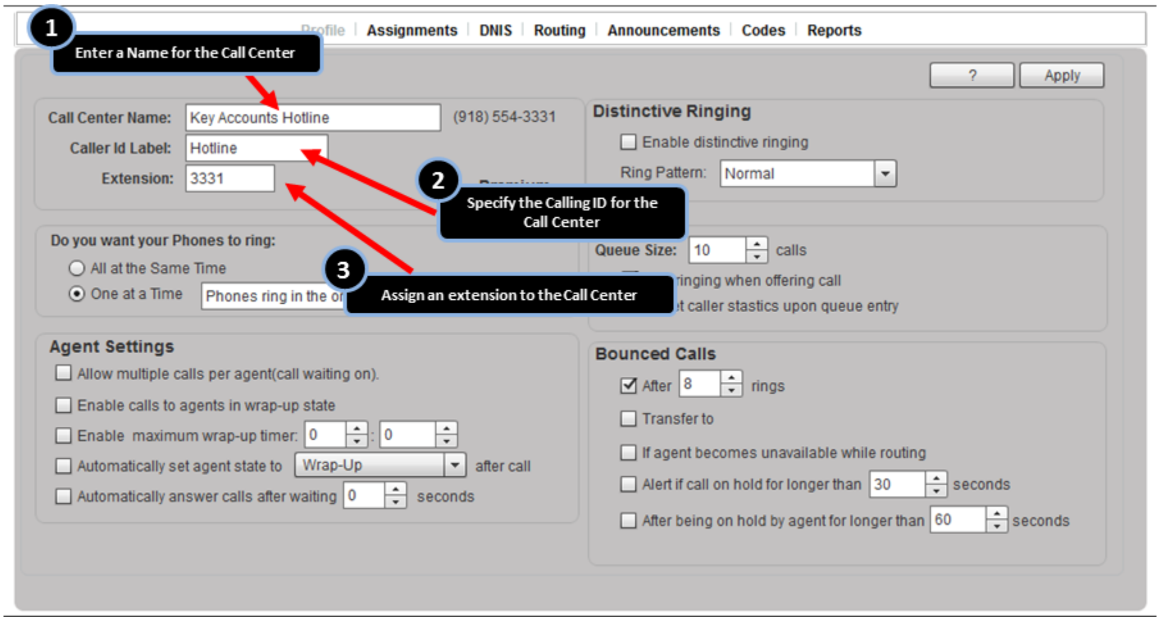
Click the 'Configuration' button

Step 4. Configure the Call Center Profile (Main Settings)

The Call Center configuration screen has six tabs. Make selections as appropriate in each tab and hit apply before moving to another tab. If selections are not made the default settings will be in effect.

NOTE:

Assignment of agents in the Assignment tab is required for the call center to be operational. Assignment of supervisors is optional.



1 Enter a Name for the Call Center

2 Specify the Calling ID for the Call Center

3 Assign an extension to the Call Center

Call Center Name: Key Accounts Hotline (918) 554-3331
Caller Id Label: Hotline
Extension: 3331

Do you want your Phones to ring:
○ All at the Same Time
● One at a Time Phones ring in the or

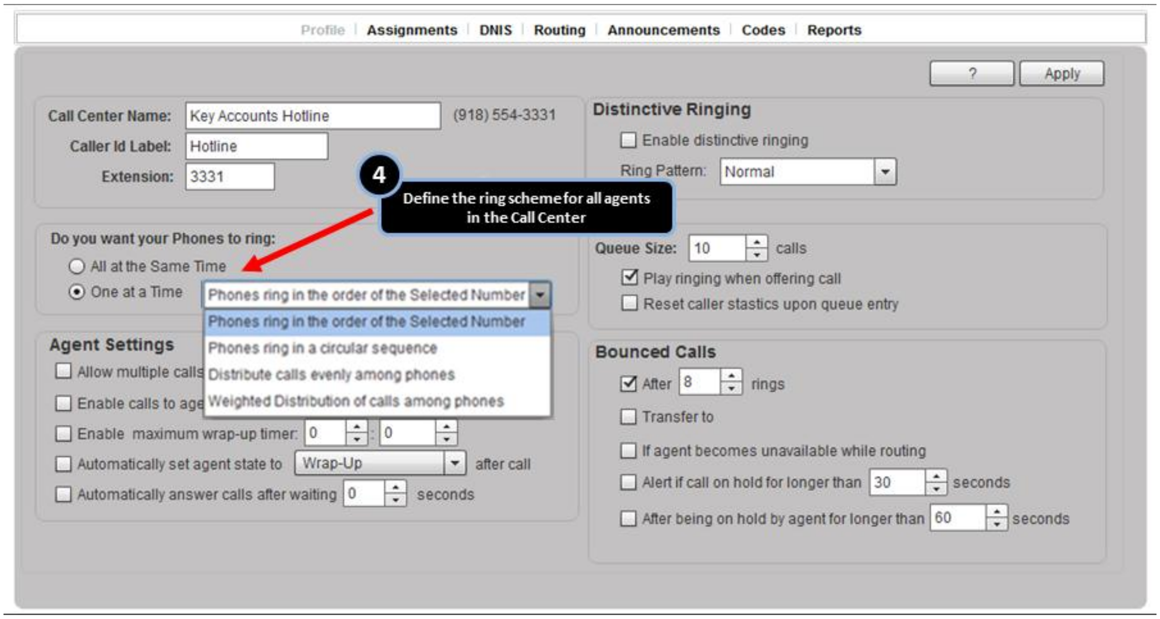
Agent Settings
☐ Allow multiple calls per agent(call waiting on).
☐ Enable calls to agents in wrap-up state
☐ Enable maximum wrap-up timer: 0 : 0
☐ Automatically set agent state to Wrap-Up after call
☐ Automatically answer calls after waiting 0 seconds

Distinctive Ringing
☐ Enable distinctive ringing
Ring Pattern: Normal

Queue Size: 10 calls
ringing when offering call
t caller stastics upon queue entry

Bounced Calls
☑ After 8 rings
☐ Transfer to
☐ If agent becomes unavailable while routing
☐ Alert if call on hold for longer than 30 seconds
☐ After being on hold by agent for longer than 60 seconds

1. Call Center Name – The entered name will be shown in list of Call Centers in the main Call Center configuration screen as well as in the Agent and Supervisor client screens
2. Caller ID Label – The entered label will be shown as the outbound caller ID name when the agent or supervisor selects this Call Center in the Caller ID selection dropdown in the web-based clients.
3. Extension – Enter the extension that will be used for internal dialing to the Call Center.


Profile | Assignments | DNIS | Routing | Announcements | Codes | Reports
?
Apply
4

Define the ring scheme for all agents in the Call Center

Call Center Name: Key Accounts Hotline (918) 554-3331
Caller Id Label: Hotline
Extension: 3331

Do you want your Phones to ring:
○ All at the Same Time
● One at a Time [Phones ring in the order of the Selected Number]
- Phones ring in the order of the Selected Number
- Phones ring in a circular sequence
- Distribute calls evenly among phones
- Weighted Distribution of calls among phones

Agent Settings
☐ Allow multiple calls
☐ Enable calls to age
☐ Enable maximum wrap-up timer: 0 : 0
☐ Automatically set agent state to Wrap-Up after call
☐ Automatically answer calls after waiting 0 seconds

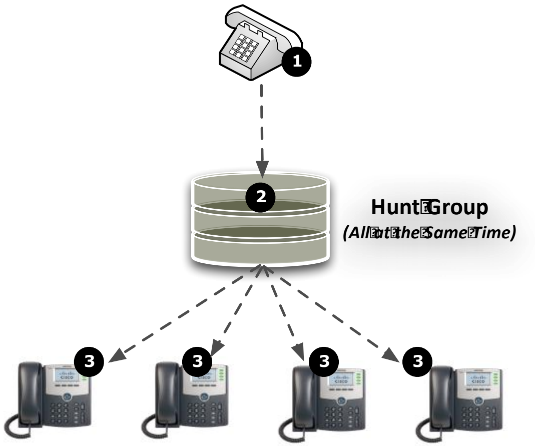
Distinctive Ringing
☐ Enable distinctive ringing
Ring Pattern: Normal

Queue Size: 10 calls
☑ Play ringing when offering call
☐ Reset caller stastics upon queue entry

Bounced Calls
☑ After 8 rings
☐ Transfer to
☐ If agent becomes unavailable while routing
☐ Alert if call on hold for longer than 30 seconds
☐ After being on hold by agent for longer than 60 seconds

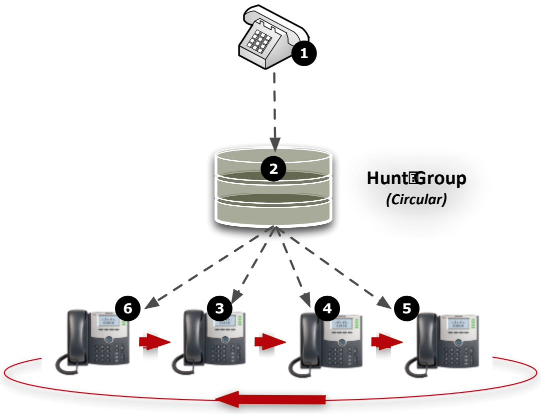
4. Do you Want your Phone to Ring- Group administrators can choose from any of the following “hunt” schemes, each of which rings the specified phones in a different manner:

- All at the Same Time – simultaneously rings all of the users in the group; the first user to pick up the ringing phone is connected



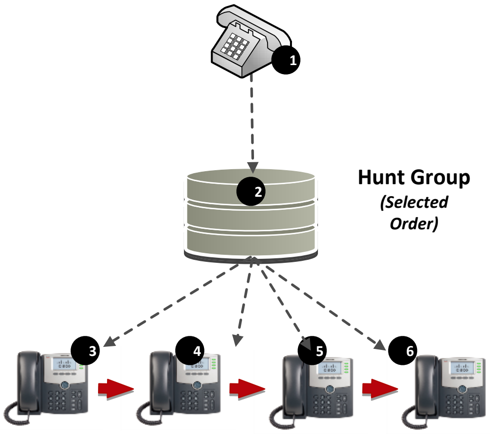
1. Caller dials the queue number,
2. The queue answers called with recorded greeting and places caller in queue while invoking the All at the Same Time ringing policy,
3. All assigned XO Hosted PBX phone ring at the same time,
4. Call is connected by the first assigned user who picks up phone

- One at a Time – There are four different options for calls to ring one at a time.
  - Phones Ring in a Circular Sequence – sends calls in a fixed order. The call is sent to the first available person on the list, beginning where the last call left off. Calls can be advanced to the next person after a defined number of rings with no answer, or if the person is already on the line.



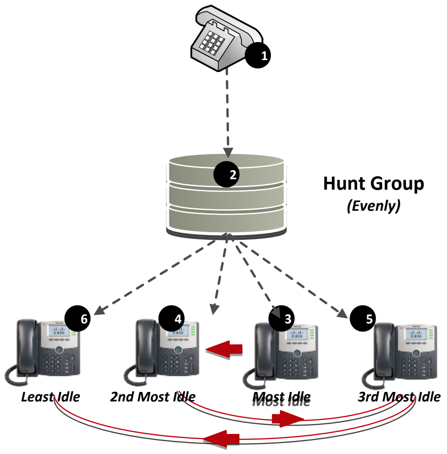
1. Caller dials the queue number,
2. The queue answers call with recorded greeting and places caller in queue while invoking the Circular ringing policy,
3. The first available XO Hosted PBX user, following the user that answered the last call, phone rings (in this case the second user),
4. Call is routed to next assigned user after predetermined number of rings with no answer, this repeats until the call is answered
5. Call is connected by the first assigned user who picks up phone

- Phones Ring in the Order of the Selected Number – sends calls to users in the order listed by an administrator in the assignment tab of the My Site Call Center configuration screen. Incoming calls go to the first available person on the list, always starting with the first person on the list. Calls can be advanced to the next person after a defined number of rings with no answer, or if the person is already on the line.



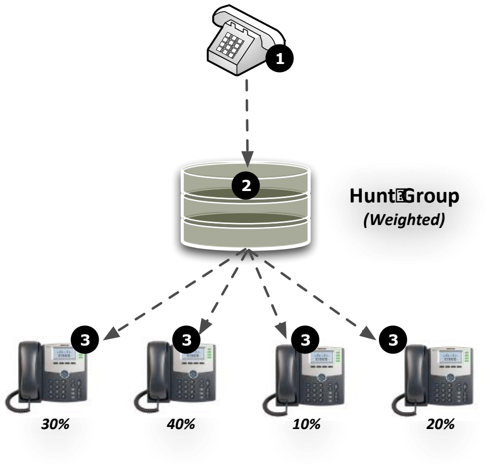
1. Caller dials the queue number,
2. The queue answers call with recorded greeting and places caller in queue while invoking the Regular ringing policy,
3. The first assigned XO Hosted PBX user phone rings,
4. Call is routed to next assigned user after predetermined number of rings with no answer, this repeats until the call is answered,
5. Call is connected by the first assigned user who picks up phone,
6. If last assigned user does not answer call, call may end, go to voicemail, or overflow based on settings, but does not start at beginning of queue.

- Phones Ring Evenly Among Phones – as a call is completed, the user moves to the bottom of the call queue in a shuffling fashion. The next incoming call goes to the user who has been idle the longest. If a user receives a call that was not directed to them through the queue, the call is not included in the receiving order for uniform calls. Calls can be advanced to the next person after a defined number of rings with no answer, or if the person is already on the line.



1. Caller dials the queue number,
2. Queue answers called with recorded greeting and places caller in queue while invoking the Uniform ringing policy,
3. The Most Idle XO Hosted PBX user phone rings,
4. Call is routed to next most idle assigned user after predetermined number of rings with no answer, this repeats until the call is answered,
5. Call is connected by the first assigned user who picks up phone
6. If last assigned user does not answer call, call may end, go to voicemail, or overflow based on settings, but does not start at beginning of queue.

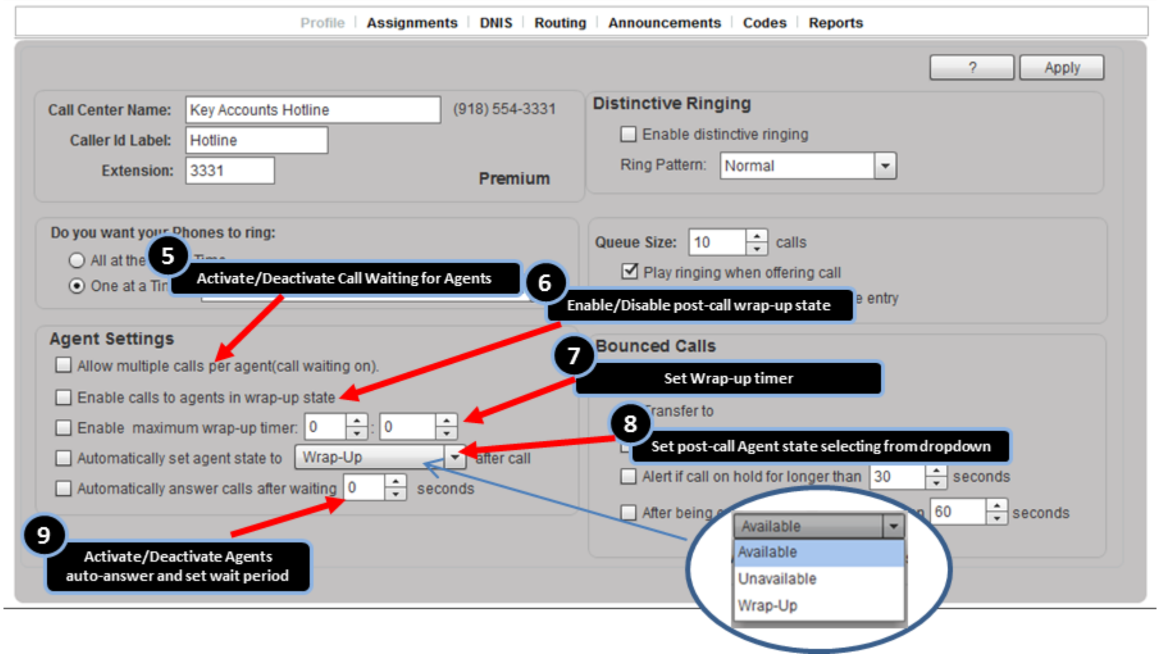
- Weighted Call Distribution – enables calls to be distributed to agents according to a pre-defined weighting. Each agent is assigned a weight corresponding to the percentage of incoming calls they should receive.



1. Caller dials the queue number,
2. The queue answers called with recorded greeting and places caller in queue while invoking the Weighted ringing policy,
3. The queue determines the appropriate phone to ring first based on maintaining the preset call distribution weights in relations to historical call volume
4. Call is routed to next user after predetermined number of rings with no answer based on maintaining the appropriate distribution weights, this repeats until the call is answered,
5. Call is connected by the first assigned user who picks up phone
6. If last assigned user does not answer call, call may end, go to voicemail, or overflow based on settings, but does not start at beginning of the queue.

- In the even that all idle phones have been visited without answer, the administrator can define how these bounced calls are handled. See the Bounced Call section below.

5-9. Agent Settings


Profile | Assignments | DNIS | Routing | Announcements | Codes | Reports
?
Apply

Call Center Name: Key Accounts Hotline (918) 554-3331

Caller Id Label: Hotline

Extension: 3331

Premium

Distinctive Ringing

☐ Enable distinctive ringing

Ring Pattern: Normal

Do you want your Phones to ring:

○ All at the Time

● One at a Tim

Queue Size: 10 calls

☑ Play ringing when offering call

e entry

Agent Settings

☐ Allow multiple calls per agent(call waiting on).

☐ Enable calls to agents in wrap-up state

☐ Enable maximum wrap-up timer: 0 : 0

☐ Automatically set agent state to Wrap-Up after call

☐ Automatically answer calls after waiting 0 seconds

Bounced Calls

ransfer to

☐ Alert if call on hold for longer than 30 seconds

☐ After being 60 seconds

5 Activate/Deactivate Call Waiting for Agents

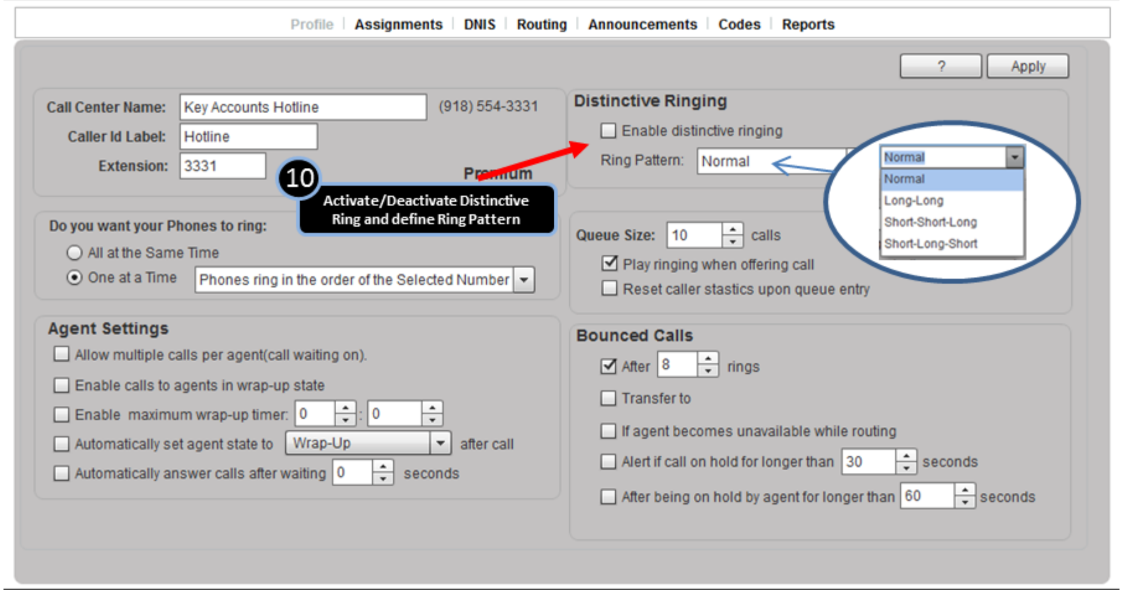
6 Enable/Disable post-call wrap-up state

7 Set Wrap-up timer

8 Set post-call Agent state selecting from dropdown

9 Activate/Deactivate Agents auto-answer and set wait period

5. Allow Multiple calls per agent(call waiting on) – When checked call center agents will be presented additional calls when they are on a call.
6. Enable calls to agents in wrap-up state – When checked agents will be presented calls when they are in a wrap-up state.
7. Enable maximum wrap-up timer – Sets the maximum time an agent may set their wrap-timer in the Agent client. The maximum time is 60 minutes
8. Automatically set agent state to – Forces the agent state to either available, unavailable or wrap-up after they hang up from a call.
9. Automatically answer calls after waiting – Sets the time in seconds that the call center will automatically answer a call for an agent.
10. Enable distinctive ringing – sets the ring pattern of the agents when a call center call is presented to their phone if ringing is turned on. *Normal* will ring the agents phone in the same pattern as their normal calls. Option distinctive ring patterns are Long-Long, Short-Short-Long, or Short-Long-Short.



Profile | Assignments | DNIS | Routing | Announcements | Codes | Reports

Call Center Name: Key Accounts Hotline (918) 554-3331
Caller Id Label: Hotline
Extension: 3331
Premium

10 Activate/Deactivate Distinctive Ring and define Ring Pattern

Distinctive Ringing
☐ Enable distinctive ringing
Ring Pattern: Normal

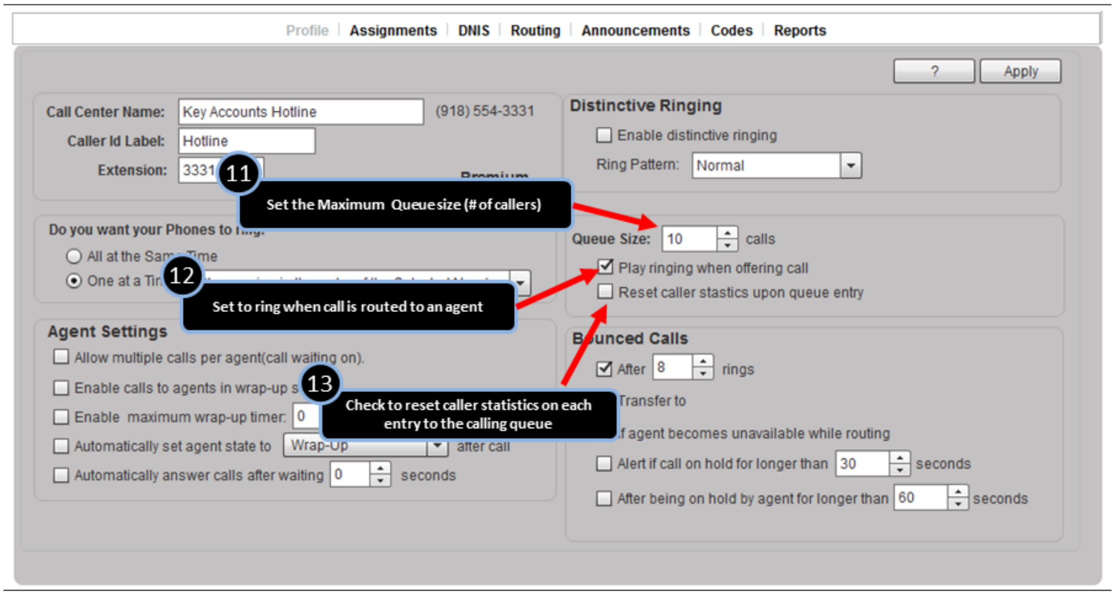
Do you want your Phones to ring:
○ All at the Same Time
● One at a Time Phones ring in the order of the Selected Number

Queue Size: 10 calls
☑ Play ringing when offering call
☐ Reset caller stastics upon queue entry

Agent Settings
☐ Allow multiple calls per agent(call waiting on).
☐ Enable calls to agents in wrap-up state
☐ Enable maximum wrap-up timer: 0 : 0
☐ Automatically set agent state to Wrap-Up after call
☐ Automatically answer calls after waiting 0 seconds

Bounced Calls
☑ After 8 rings
☐ Transfer to
☐ If agent becomes unavailable while routing
☐ Alert if call on hold for longer than 30 seconds
☐ After being on hold by agent for longer than 60 seconds

11-13. Queue settings



Profile | Assignments | DNIS | Routing | Announcements | Codes | Reports

Call Center Name: Key Accounts Hotline (918) 554-3331
Caller Id Label: Hotline
Extension: 3331

11 Set the Maximum Queue size (# of callers)

Distinctive Ringing
☐ Enable distinctive ringing
Ring Pattern: Normal

Do you want your Phones to
○ All at the Sam Time
● One at a Ti

12 Set to ring when call is routed to an agent

Queue Size: 10 calls
☑ Play ringing when offering call
☐ Reset caller stastics upon queue entry

Agent Settings
☐ Allow multiple calls per agent(call waiting on).
☐ Enable calls to agents in wrap-up s
☐ Enable maximum wrap-up timer: 0
☐ Automatically set agent state to Wrap-Up after call
☐ Automatically answer calls after waiting 0 seconds

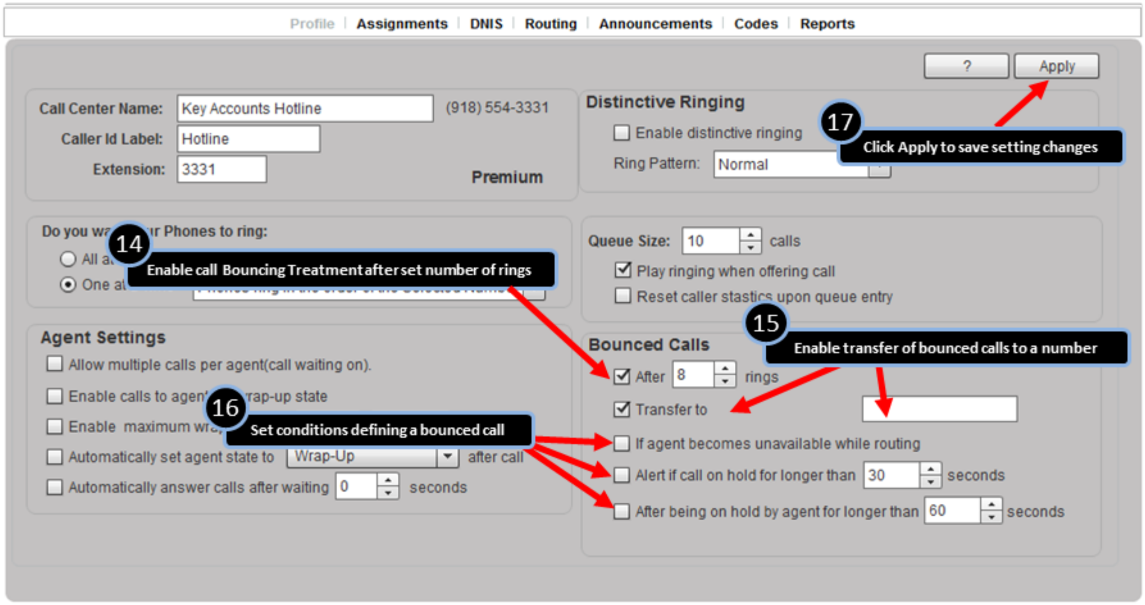
13 Check to reset caller statistics on each entry to the calling queue

Bounced Calls
☑ After 8 rings
Transfer to
f agent becomes unavailable while routing
☐ Alert if call on hold for longer than 30 seconds
☐ After being on hold by agent for longer than 60 seconds

11. Queue Size – determines the number of calls that will be held in the call center queue. Size can be 1 to 50. If calls are received after the queue is full, those calls will be considered overflow and will follow the rules set in the Overflow tab of under Routing.
12. Play ringing when offering a call – if checked will ring phones when the call is offered to an agent. If not checked, an agents phone will not ring but only show caller ID information.
13. Reset Call statistics upon queue entry – calls in a call center queue have a timer for the amount of time spent in the queue. If not checked, calls will keep the same timer even if moved from one call center queue to another or even if bounce out of one call center to another. The timer is used by for distributing calls among agents and for bounced call treatment. If checked, calls will have their queue timer reset when they are moved or routed to a different queue which will effect how they are treated.

Steps 14-16 Bounced Calls

These settings determine the criteria when a call will be put in a Bounced state. A bounced call is a call that is being routed to the agent but for some reason (agent does not answer the call, they change to unavailable, their device is not registered, and so on) the call is not answered. A bounced call will be routed to the next available agent as defined in the ringing sequence defined 4 above unless it is transferred out of the queue described in 15 below.



Call Center Name: Key Accounts Hotline (918) 554-3331
Caller Id Label: Hotline
Extension: 3331
Premium

Distinctive Ringing
☐ Enable distinctive ringing
Ring Pattern: Normal

17 Click Apply to save setting changes

Do you wa r Phones to ring:
○ All a
● One at

14 Enable call Bouncing Treatment after set number of rings

Queue Size: 10 calls
☑ Play ringing when offering call
☐ Reset caller stastics upon queue entry

15 Enable transfer of bounced calls to a number

Agent Settings
☐ Allow multiple calls per agent(call waiting on).
☐ Enable calls to agen rap-up state
☐ Enable maximum wra
☐ Automatically set agent state to Wrap-Up after call
☐ Automatically answer calls after waiting 0 seconds

16 Set conditions defining a bounced call

Bounced Calls
☑ After 8 rings
☑ Transfer to
☐ If agent becomes unavailable while routing
☐ Alert if call on hold for longer than 30 seconds
☐ After being on hold by agent for longer than 60 seconds

14. After # rings – sets the number of rings to an agent after which a call will be bounced. If set the call will go to the transfer to number. If no transfer number is entered and active the call will be sent to the next available agent.

15. Transfer to – if checked, a field allows you to enter a telephone number (10-digit or extension) which will transfer the call out of the queue if the call meets the criteria in 14 above or 16 below.

    If not checked, then the call stays in the queue and continues ringing and bouncing until an agent or supervisor picks up the call or the caller hangs up.

16. Sets other parameters for a bounced call:
    a. If agent becomes unavailable while routing – will set a call as bounced if the agent becomes unavailable during the routing of the call.
    b. After being on hold for XX seconds – will set a call as bounced if on hold by an agent for more than the configured number of seconds.

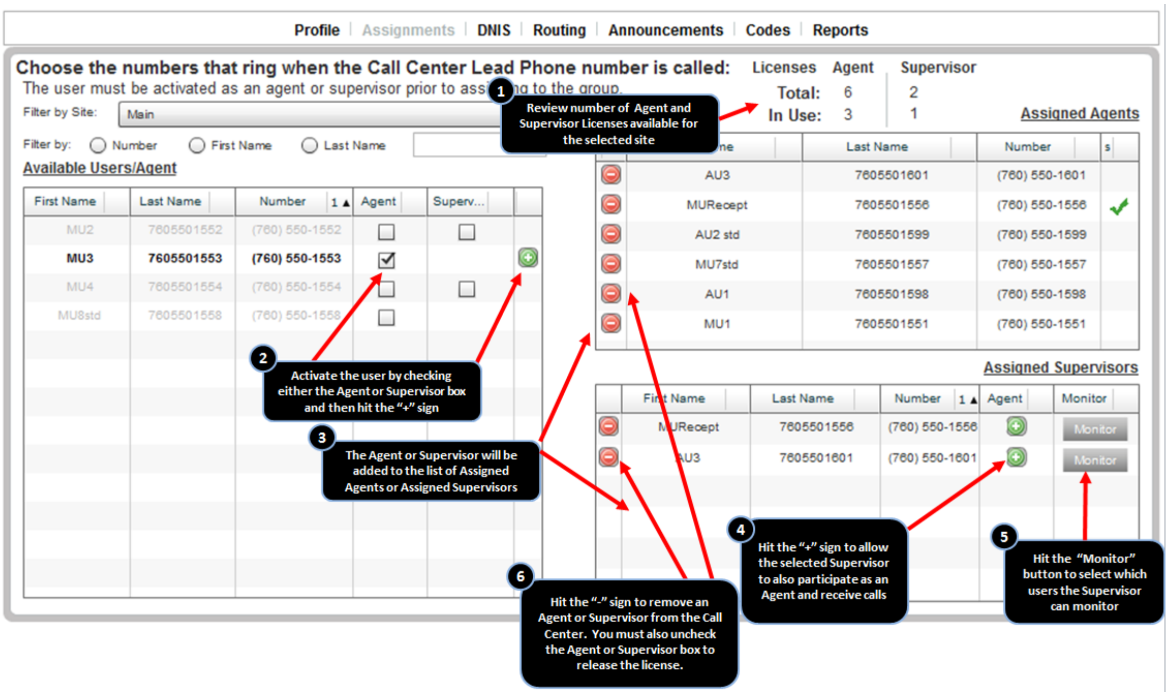
       Alert if call on hold for more than XX seconds - If checked, an agent will be alerted with a splash tone on their phone and a message in their web client that a call has been on hold for the configured amount of time. This time should be set shorter than the bounced time period to allow an agent to pick-up the held call before it is bounced.
    c. After being on hold by agent for longer that XX seconds – If checked, a call will be marked as bounced if it is on hold by the agent for more than the entered number of seconds.

Step 17. Hit Apply

Hitting *Apply* is required to save any changes to the Profile tab.

Step 5. Configure the Call Center Assignments

The Assignments tab is where agents and supervisors are assigned to the Call Center



Choose the numbers that ring when the Call Center Lead Phone number is called:

The user must be activated as an agent or supervisor prior to assi ng to the group.

Licenses	Agent	Supervisor
Total:	6	2
In Use:	3	1

Available Users/Agent

First Name	Last Name	Number 1 ▲	Agent	Superv...	
MU2	7605501552	(760) 550-1552	☐	☐	
MU3	7605501553	(760) 550-1553	☑		⊕
MU4	7605501554	(760) 550-1554	☐	☐	
MU8std	7605501558	(760) 550-1558	☐		

Assigned Agents

	ne	Last Name	Number	s
⊖	AU3	7605501601	(760) 550-1601	
⊖	MURecept	7605501556	(760) 550-1556	✓
⊖	AU2 std	7605501599	(760) 550-1599	
⊖	MU7std	7605501557	(760) 550-1557	
⊖	AU1	7605501598	(760) 550-1598	
⊖	MU1	7605501551	(760) 550-1551	

Assigned Supervisors

	First Name	Last Name	Number 1 ▲	Agent	Monitor
⊖	MURecept	7605501556	(760) 550-1556	⊕	Monitor
⊖	AU3	7605501601	(760) 550-1601	⊕	Monitor

1 Review number of Agent and Supervisor Licenses available for the selected site

2 Activate the user by checking either the Agent or Supervisor box and then hit the "+" sign

3 The Agent or Supervisor will be added to the list of Assigned Agents or Assigned Supervisors

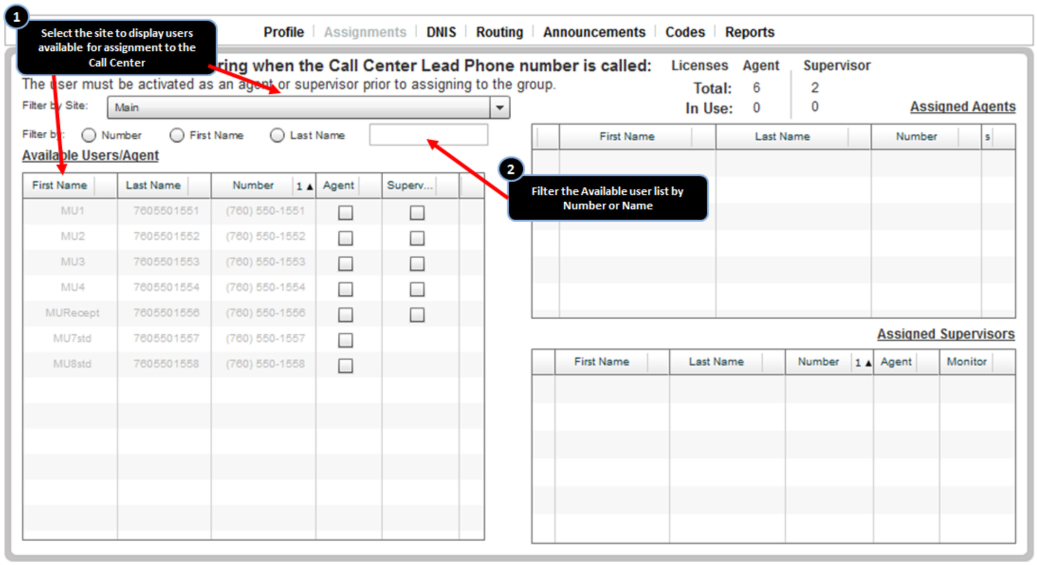
4 Hit the "+" sign to allow the selected Supervisor to also participate as an Agent and receive calls

5 Hit the "Monitor" button to select which users the Supervisor can monitor

6 Hit the "-" sign to remove an Agent or Supervisor from the Call Center. You must also uncheck the Agent or Supervisor box to release the license.

1. Review Agent/Supervisor License Availability - The License information will show the Total and In Use Call Center licenses. Total is the number of both agent and supervisor licenses that have been purchased for the site. In Use shows the number of licenses that have been activated in in the screens below. This information will update when users are activated as agents and supervisors and added to the Call Center. In order to assign users from a different site from where the Call Center resides, an adequate number Agent and/or Supervisor licenses are needed on the site where the user account resides.

You can select a Site, then filter by Number, First Name, or Last Name.



① Select the site to display users available for assignment to the Call Center

② Filter the Available user list by Number or Name

Profile | Assignments | DNIS | Routing | Announcements | Codes | Reports

ring when the Call Center Lead Phone number is called:

The user must be activated as an agent or supervisor prior to assigning to the group.

Filter by Site: Main

Filter by: ○ Number ○ First Name ○ Last Name

Licenses	Agent	Supervisor
Total:	6	2
In Use:	0	0

Available Users/Agent

First Name	Last Name	Number	Agent	Superv...
MU1	7605501551	(760) 550-1551	☐	☐
MU2	7605501552	(760) 550-1552	☐	☐
MU3	7605501553	(760) 550-1553	☐	☐
MU4	7605501554	(760) 550-1554	☐	☐
MURecept	7605501556	(760) 550-1556	☐	☐
MU7std	7605501557	(760) 550-1557	☐	
MU8std	7605501558	(760) 550-1558	☐	

Assigned Agents

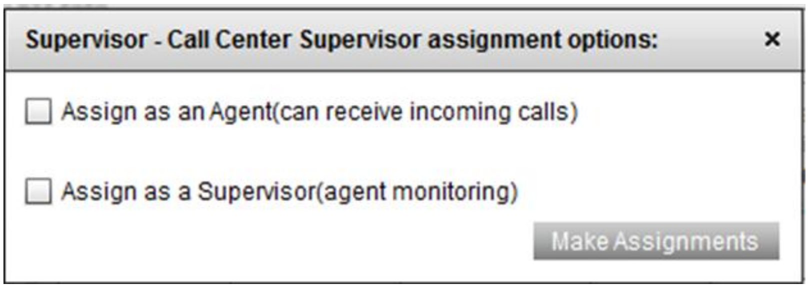
First Name	Last Name	Number	s

Assigned Supervisors

First Name	Last Name	Number	Agent	Monitor

2. Activate Agent or Supervisor License for User - In the Available Users/Agent box, the available users to be assigned as an agent or supervisor will be shown. By checking the box next to a user, an Agent or Supervisor license is activated and will be removed from available licenses. This step must be completed before a user can be added as an Agent or Supervisor to the Call Center.

When a user is assigned a Supervisor license, a pop-up appears which allows the assignment of the Supervisor to also be an Agent that receives calls. Check the boxes to assign as a Supervisor and/or an Agent.



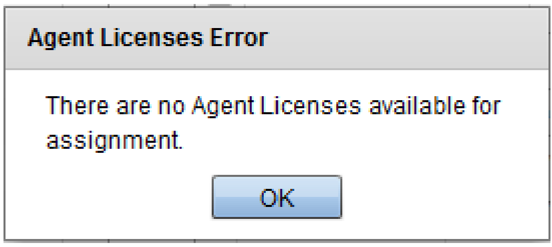
Supervisor - Call Center Supervisor assignment options:

☐ Assign as an Agent(can receive incoming calls)

☐ Assign as a Supervisor(agent monitoring)

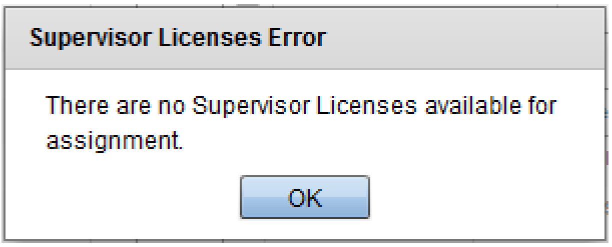
Supported station types for Agents and Supervisors are Premium User, Hosted PRI User and Receptionist station Agents are activated as and an agent or supervisors

If there are no Agent or Supervisor licenses available for assignment an error message will display if you try to assign a license to a user. You are required to place an order for additional licenses if required.



Agent Licenses Error

There are no Agent Licenses available for assignment.



Supervisor Licenses Error

There are no Supervisor Licenses available for assignment.

3. Add Agent or Supervisor to Call Center – After an Agent or Supervisor has be assigned a license by checking the box, hit the "+" sign to add the selected user to the Call Center.

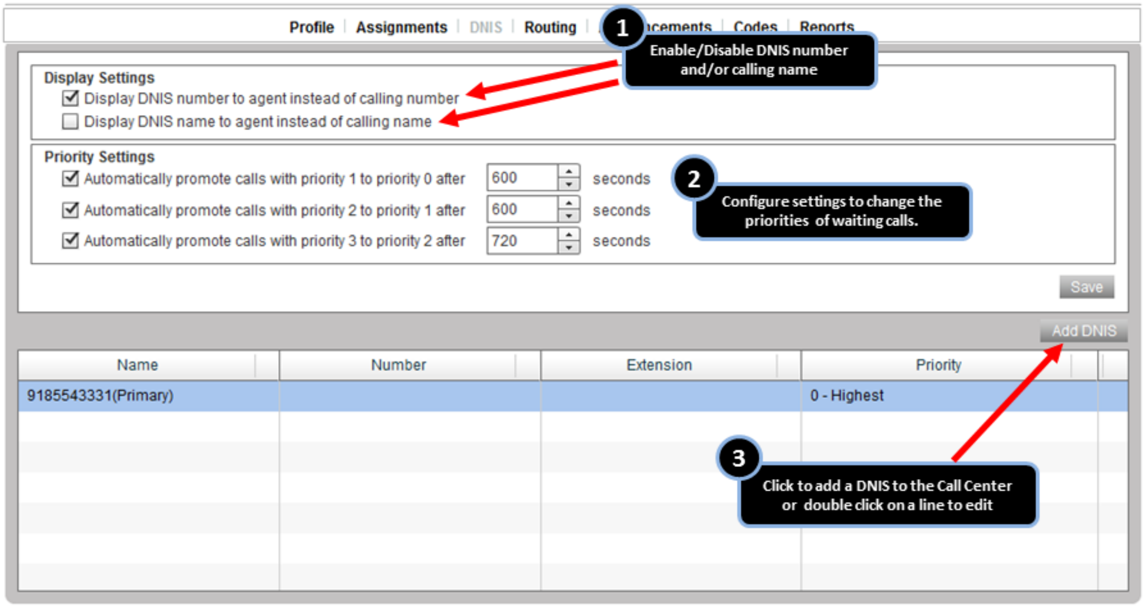
4. Add Supervisor to Call Center as an Agent (Optional) – If a Supervisor is not assigned as an Agent in number 2 above, they may be assigned by hitting the "+" next to the user under the Agent column in the Assigned Supervisors box.

5. Select Users for the Supervisor to Monitor – Monitoring allows a Supervisor to view an Agent available status in the web client as well as monitor (listen in) calls of the agents.

By default, assigned agents can be monitored by the Supervisor but can be removed or added by hitting the *Monitor* button next to the Supervisor in the Assigned Supervisors section. Add agents to monitor by hitting the "+" sign next to a user or remove an agent from monitoring by hitting the "-"sign next to the user.

6. Remove Agents/Supervisors from Call Center – To remove an Agent or Supervisor from participating in the Call Center, hit the "-" sign next to the users in either the Assigned Agent box or Assigned Supervisor box.

Step 7. Configure Call Center DNIS Settings


Profile
Assignments
DNIS
Routing
ncements
Codes
Reports
1
Enable/Disable DNIS number and/or calling name
2
Configure settings to change the priorities of waiting calls.
Save
Add DNIS
3
Click to add a DNIS to the Call Center or double click on a line to edit

Display Settings

☑ Display DNIS number to agent instead of calling number

☐ Display DNIS name to agent instead of calling name

Priority Settings

☑ Automatically promote calls with priority 1 to priority 0 after 600 seconds

☑ Automatically promote calls with priority 2 to priority 1 after 600 seconds

☑ Automatically promote calls with priority 3 to priority 2 after 720 seconds

Name	Number	Extension	Priority
9185543331(Primary)			0 - Highest

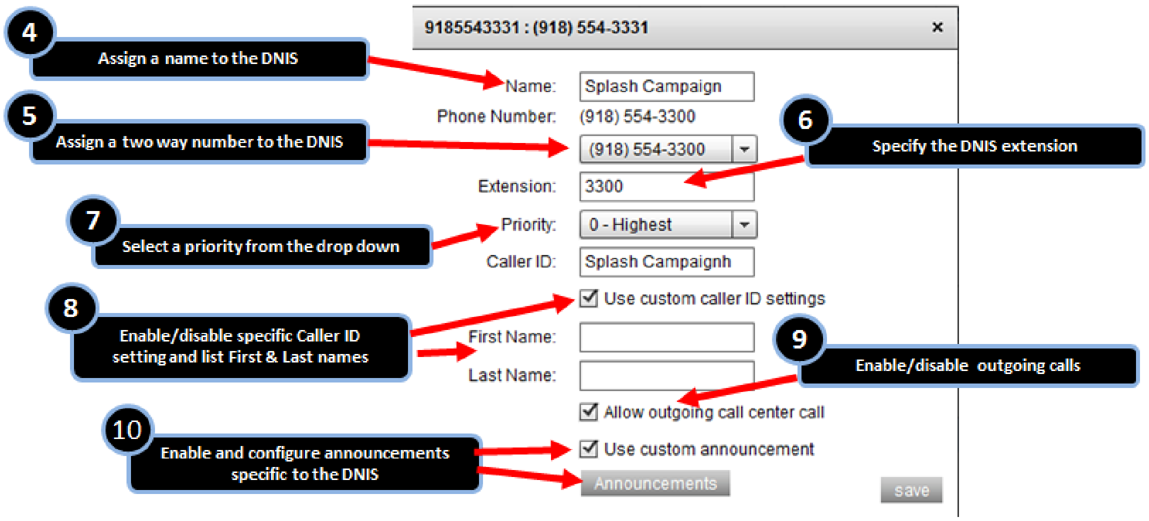
1. Display Settings – As an option, administrators may choose to display the called number information (Dialed Number Identification Service – DNIS) instead of the calling name and number. Check the box to show the calling number or calling name.

   This may be helpful to call centers that receive calls for multiple ad campaigns or support different companies which have different telephone numbers. The agent can identify what number was called and answer the phone appropriately.

2. Priority Settings – Calls in a Call Center are normally sent to Agents in the order that they enter the queue and based on the priority assigned to calls based on the Call Center or DNIS number they dialed. Priority ranges from 0 (highest) to 3 (lowest).

   Calls can be automatically given higher priority (promoted) if they are in a queue for a set amount of time. Select the appropriate box and enter a number of seconds.

3. Add DNIS – Allows additional telephone numbers to be directed to a Call Center and answered by agents.



9185543331 : (918) 554-3331

4 Assign a name to the DNIS

5 Assign a two way number to the DNIS

6 Specify the DNIS extension

7 Select a priority from the drop down

8 Enable/disable specific Caller ID setting and list First & Last names

9 Enable/disable outgoing calls

10 Enable and configure announcements specific to the DNIS

Name: Splash Campaign

Phone Number: (918) 554-3300

(918) 554-3300

Extension: 3300

Priority: 0 - Highest

Caller ID: Splash Campaignh

☑ Use custom caller ID settings

First Name:

Last Name:

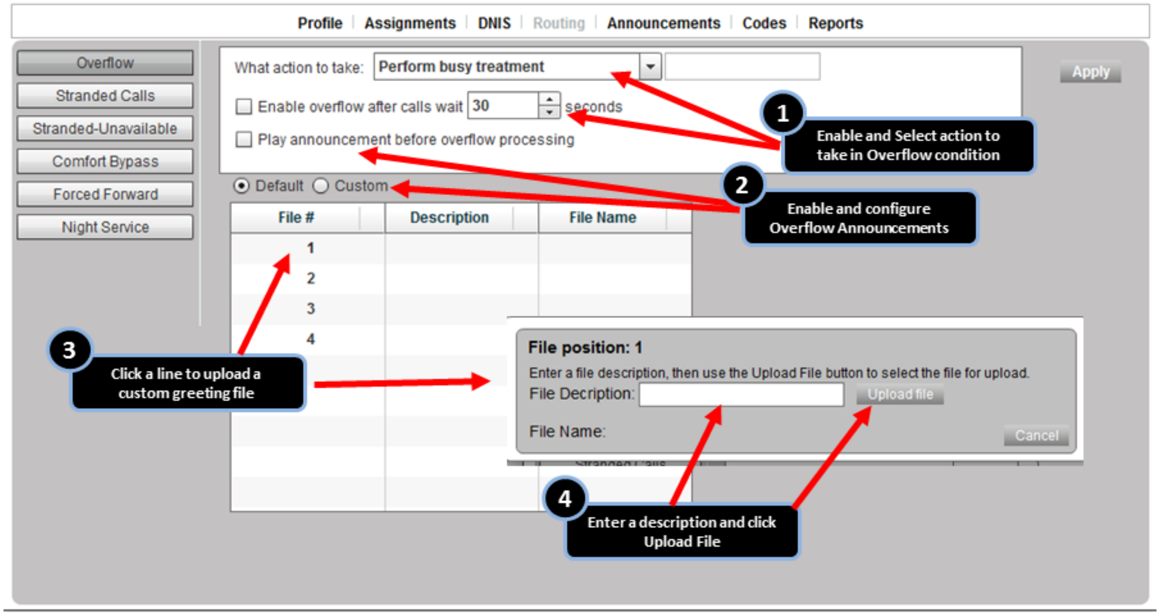
☑ Allow outgoing call center call

☑ Use custom announcement

4. Enter a name for the DNIS that will be displayed in the clients to identify the DNIS queue.
5. Select the 2-way number to assign to this DNIS queue. The drop down will show available Site numbers.
6. Enter the extension number of the DNIS queue that can be reached by internal dialing.
7. Select a default priority for calls to this DNIS queue. Priority ranges from 0 (highest) to 3 (lowest).
8. You have the option to create an optional Caller ID for this DNIS. Check the *Use customer caller ID settings* box and enter a First Name and Last Name for the Caller ID.
9. Allow outgoing call center call – Enables an agent or supervisor to select the Caller ID of the DNIS when making an outgoing call instead of their own Caller ID. Check the box to allow this feature.
10. Use custom announcement – Enables the customization of announcements specifically for each DNIS queue. See the Step 9 Announcements below.

Step 8. Configure Routing Options

The Routing tab allows configuration of call routing and handling for specific conditions: overflow, stranded calls, stranded-unavailable, forced forward and night service.



What action to take: Perform busy treatment

☐ Enable overflow after calls wait 30 seconds

☐ Play announcement before overflow processing

● Default ○ Custom

File #	Description	File Name
1		
2		
3		
4		

File position: 1

Enter a file description, then use the Upload File button to select the file for upload.

File Decription:

File Name:

1 Enable and Select action to take in Overflow condition

2 Enable and configure Overflow Announcements

3 Click a line to upload a custom greeting file

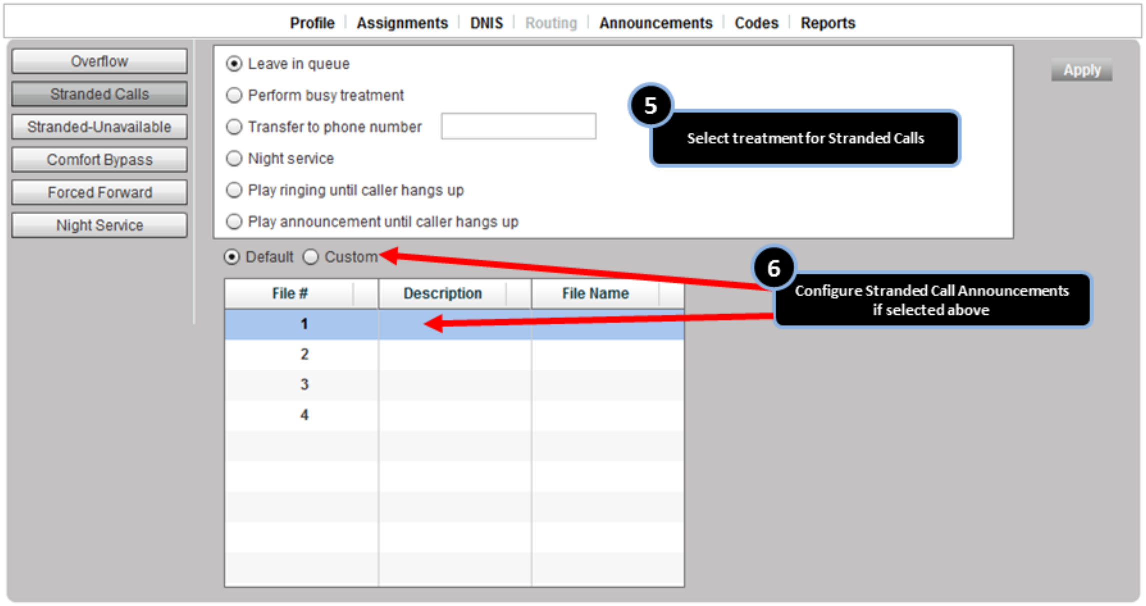
4 Enter a description and click Upload File

1. Overflow treatment – Overflow occurs when a greater number of calls are made than the size of the queue configured for a specific call center. There are three options available for routing of the overflow calls:
   - Perform Busy Treatment – The caller will hear a busy signal.
   - Transfer to a phone number – enter a phone number to which the caller will be transferred.
   - Play ringing until the caller hangs up – The caller will hear ringing until they hang up. They will not be placed in the queue.

   Calls in a call center queue can also be marked as overflow if they have been waiting in queue for a set amount of seconds.

   - Check the box and enter the number of seconds after which a call is considered overflow
2. Play an announcement before overflow processing – The Call Center service allows a message to be played before a caller is sent to overflow treatment. This can be used to inform the caller what is happening to their call. Check the box to enable an announcement and hit either default or custom. Custom announcements are explained below.
3. Call Center supports up to 4 custom announcements that are played in order 1-4. To upload the file with the custom announcement hit the File #. A pop-up will allow the upload of the announcement file. The announcement must be formatted as CCIT u-Law 8.000kHz, 8 bit Mono .WAV.
4. Enter a description of the file and then hit upload file. A windows pop-up will appear which will allow you to find the file on your computer or network and select it. Hit open in the windows pop-up to save the file. The file will appear in the file list.
5. Stranded Calls

   A stranded call is a call that is being processed by a queue that has no agents currently staffed. (An agent is said to be staffing a queue if the agent has joined the queue and is not in the Sign-out state.) If the last agent staffing a queue “unjoins” the queue or signs out, then all calls in the queue become stranded and handled as described. If an incoming call is received by a queue with no agents staffing the call center, then the call is initially put in the queue. Once the queued call is ready to be offered to an agent, if there are no agents staffing the queue, then the call is processed as a stranded call. In particular, if the mandatory Entrance Message option is enabled, then the entrance message is played to completion before the call is handled as a stranded call.


Profile
Assignments
DNIS
Routing
Announcements
Codes
Reports
Overflow
Stranded Calls
Stranded-Unavailable
Comfort Bypass
Forced Forward
Night Service
Apply
File #
Description
File Name
1
2
3
4
5
6

● Leave in queue
○ Perform busy treatment
○ Transfer to phone number
○ Night service
○ Play ringing until caller hangs up
○ Play announcement until caller hangs up

● Default ○ Custom

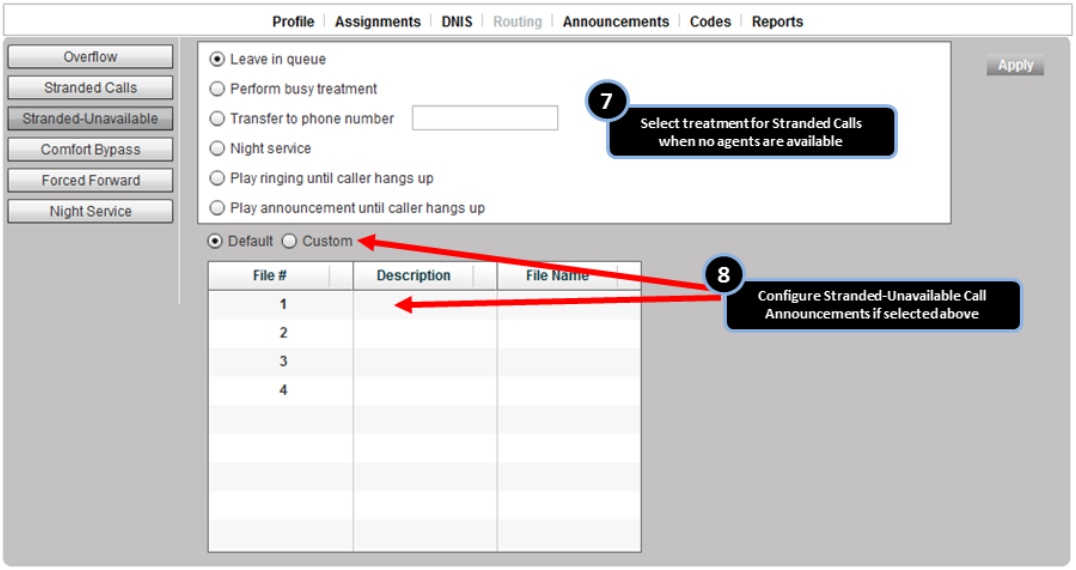
5 Select treatment for Stranded Calls

6 Configure Stranded Call Announcements if selected above

Options for Stranded Calls:

- Leave in queue
- Perform busy treatment
- Transfer to a phone number (must enter a phone number)
- Night Service
- Play ringing until caller hangs up
- Play announcement until caller hangs up

6. Configure the announcement(s) to be played. See Steps 8.3 and 8.4 for details.
7. Stranded – Unavailable


Profile
Assignments
DNIS
Routing
Announcements
Codes
Reports
Overflow
Stranded Calls
Stranded-Unavailable
Comfort Bypass
Forced Forward
Night Service
Apply
File #
Description
File Name
1
2
3
4
7
8

● Leave in queue
○ Perform busy treatment
○ Transfer to phone number
○ Night service
○ Play ringing until caller hangs up
○ Play announcement until caller hangs up

● Default ○ Custom

7 Select treatment for Stranded Calls when no agents are available

8 Configure Stranded-Unavailable Call Announcements if selected above

This policy allows for the configuration of the processing of calls that are in a staffed queue when all agents are unavailable. A “staffed” queue has one or more agents who are both joined to and signed in to the queue. Two conditions trigger the configured policy action:

- An incoming call is received by a queue where all staffed agents are unavailable. If the mandatory entrance message option is enabled, it is played to completion before the policy action is applied to the call.
- One or more calls are waiting in a call center queue when it is determined that all staffed agents are unavailable. The policy action is applied to all calls in the queue.

There are multiple options for handling stranded-unavailable calls. The following actions may be configured:

- Leave in queue
- Perform busy treatment
- Transfer to a phone number (must enter a phone number)
- Night Service
- Play ringing until caller hangs up
- Play announcement until caller hangs up

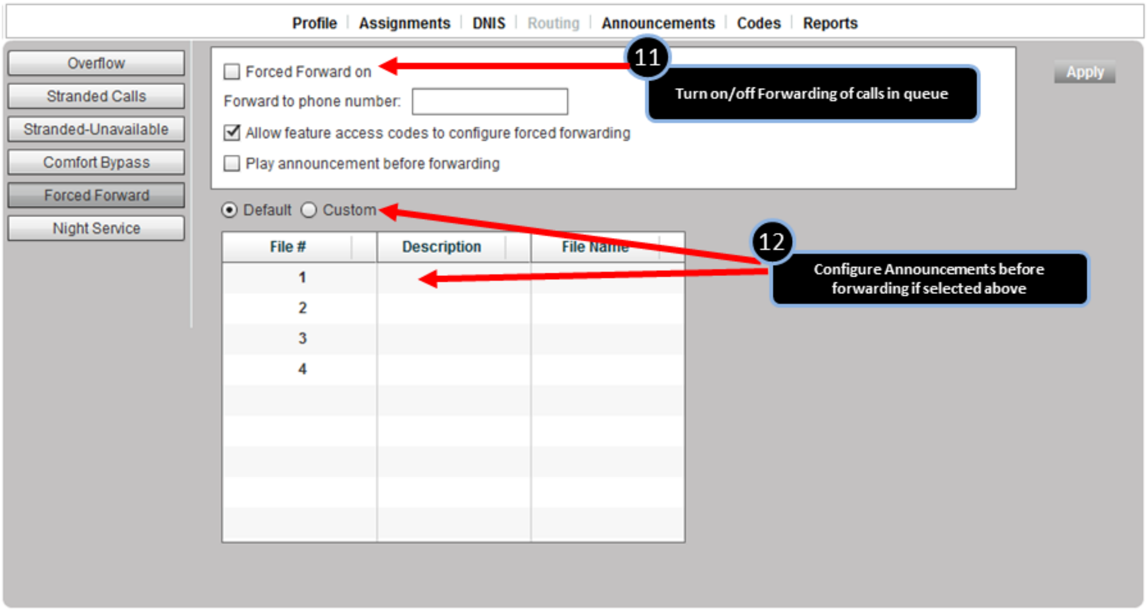
8. Configure the announcement(s) to be played. See Steps 8.3 and 8.4 for details.
9. Comfort Bypass

   Comfort Bypass is an optional message that will be played in place of the normal Comfort message (if configured) and is for short estimated wait times in the Call Center queue.

   - Comfort message bypass on – check the box to enable the Comfort Bypass message.
   - If enabled – enter the threshold in time for message to be played. The message will be played if the wait time is under this entered time.
10. Play announcement after ringing for XX seconds – sets the conditional time after which the Comfort Bypass message will be played.

    Select the Default or Custom announcement. See Steps 8.3 and 8.4 above for details on uploading the custom announcement(s).
11. Forced Forward

    Forced Forward is used to divert calls to the Call Center to a different number on a temporary or emergency basis. Calls in queue are not affected but any new calls to the queue will be forwarded.


Profile
Assignments
DNIS
Routing
Announcements
Codes
Reports
Overflow
Stranded Calls
Stranded-Unavailable
Comfort Bypass
Forced Forward
Night Service
Apply
11
12

☐ Forced Forward on

Forward to phone number:

☑ Allow feature access codes to configure forced forwarding

☐ Play announcement before forwarding

● Default ○ Custom

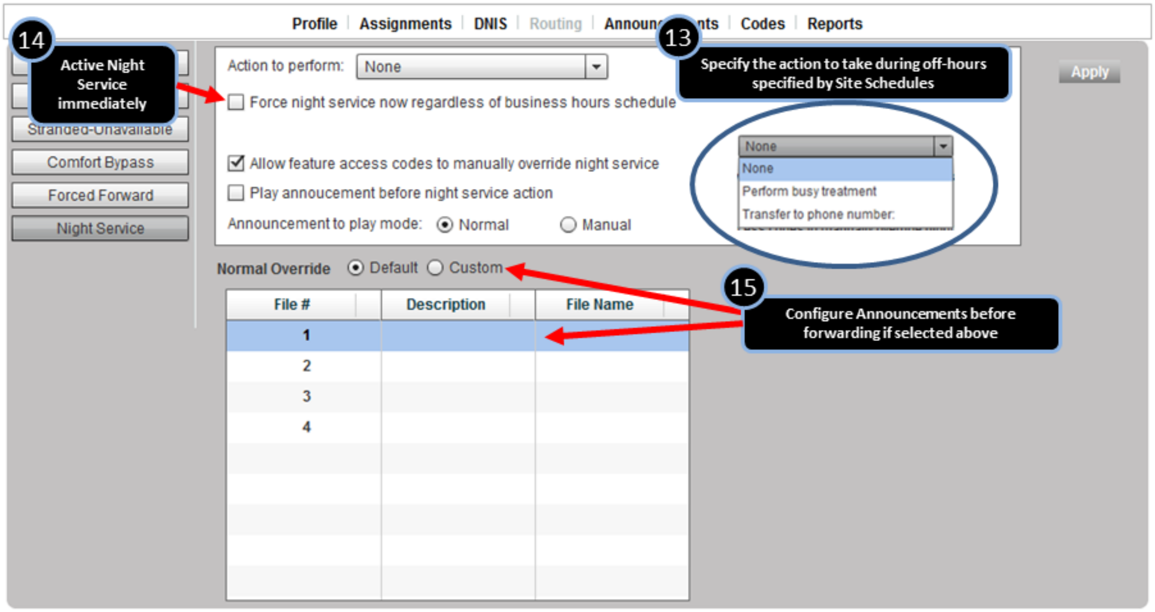
File #	Description	File Name
1		
2		
3		
4		

11 Turn on/off Forwarding of calls in queue

12 Configure Announcements before forwarding if selected above

- Forced Forward on – Check the box to enable forced forwarding. Enter the phone number to send the forwarded calls.
- Allow feature access codes to configure forced forwarding – Checking the box enables the use feature access codes to activate and deactivate the forced forwarding of calls.
- Play announcement before forwarding – Enables either a default or custom announcement to be played before

12. Select the Default or Custom announcement. See Steps 8.3 and 8.4 above for details on uploading the custom announcement(s).


Profile
Assignments
DNIS
Routing
Announcements
Codes
Reports
Stranded-Unavailable
Comfort Bypass
Forced Forward
Night Service
Apply
14
13
15
None
None
Perform busy treatment
Transfer to phone number:

Action to perform: None

☐ Force night service now regardless of business hours schedule

☑ Allow feature access codes to manually override night service

☐ Play annoucement before night service action

Announcement to play mode: ● Normal ○ Manual

Normal Override ● Default ○ Custom

File #	Description	File Name
1		
2		
3		
4		

14 Active Night Service immediately

13 Specify the action to take during off-hours specified by Site Schedules

15 Configure Announcements before forwarding if selected above

13. Night Service

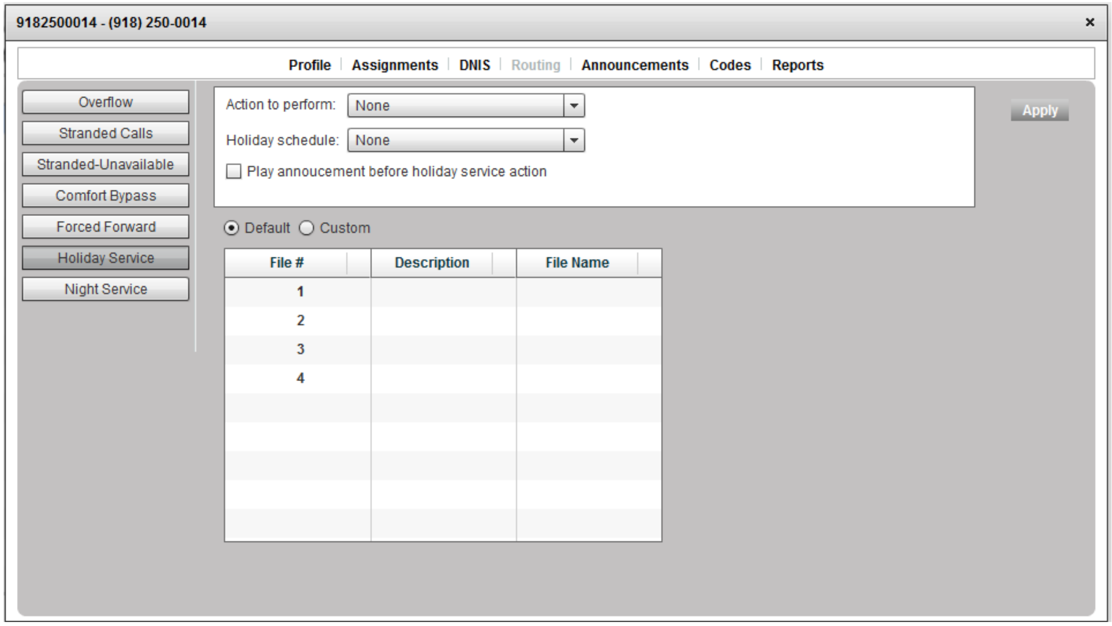
Night Service allows a different treatment for calls during off-hours as defined in Site Schedules. The Schedule tab under Site Services allows the definition of start time and end time for each day, after which is considered night time.

- Action to perform – select none, perform busy treatment or transfer to a phone number. If transfer to a phone number is selected, enter the phone number in the box provided.

14. Force night service now regardless of business hours schedule – immediately forces calls to the call center to follow the rule defined in the Action to perform.

    - Allow feature access codes to manually override night service – Enables the use of feature access codes to force the call center into night service (*53) and to remove from night service (*54).
    - Play announcement before night service action – When the Call Center is in Night Service due to the schedule or if forced, checking this option enables the default or customer announcement to be played before the night service treatment is performed.

15. Select the Default or Custom announcement. See Steps 8.3 and 8.4 above for details on uploading the custom announcement(s).
16. Holiday Service



9182500014 - (918) 250-0014

Action to perform: None

Holiday schedule: None

☐ Play annoucement before holiday service action

● Default ○ Custom

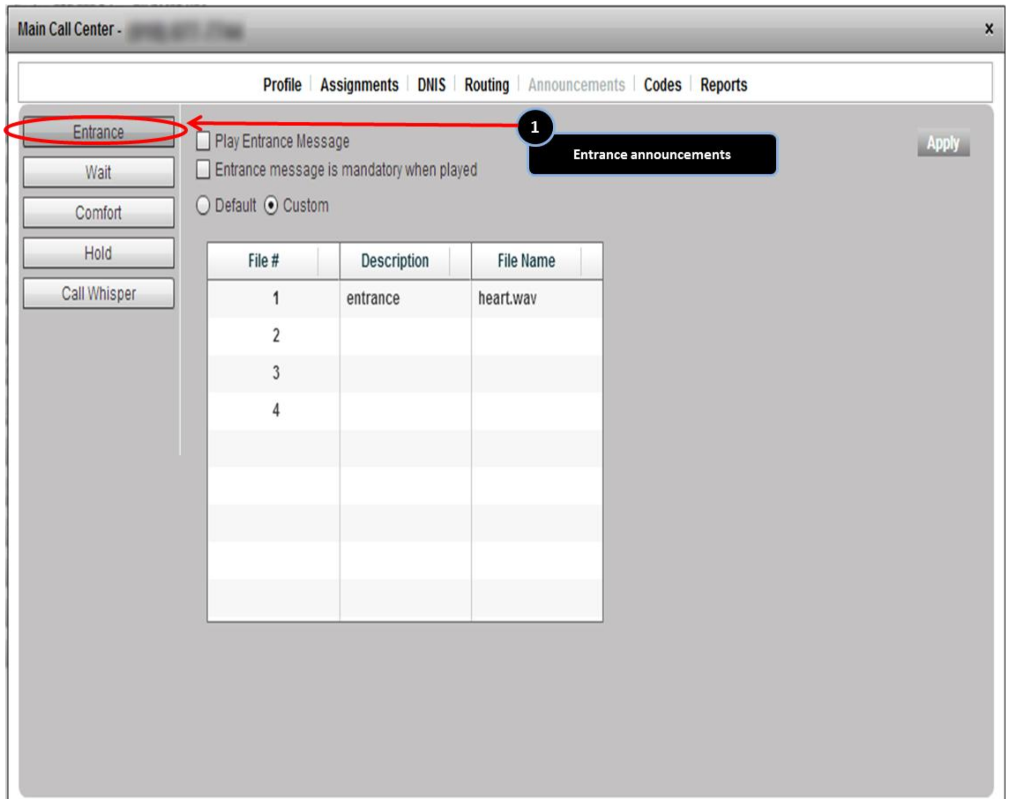
File #	Description	File Name
1		
2		
3		
4		

Holiday Service allows a different treatment for calls during Holidays as defined in Site Schedules. The Holiday tab under Site Services allows the definition of start time and end time for each day deemed to be a Holiday.

- Action to perform – select none, perform busy treatment or transfer to a phone number. If transfer to a phone number is selected, enter the phone number in the box provided.
- Holiday schedule – Select the holiday schedule to follow
- Play announcement before night service action – When the Call Center is in Night Service due to the schedule or if forced, checking this option enables the default or customer announcement to be played before the night service treatment is performed.

17. Select the Default or Custom announcement. See Steps 8.3 and 8.4 above for details on uploading the custom announcement(s).

Step 9. Configure Call Center Announcements


Main Call Center - [redacted]
×
Profile
Assignments
DNIS
Routing
Announcements
Codes
Reports
Entrance
Wait
Comfort
Hold
Call Whisper
1
Entrance announcements
Apply

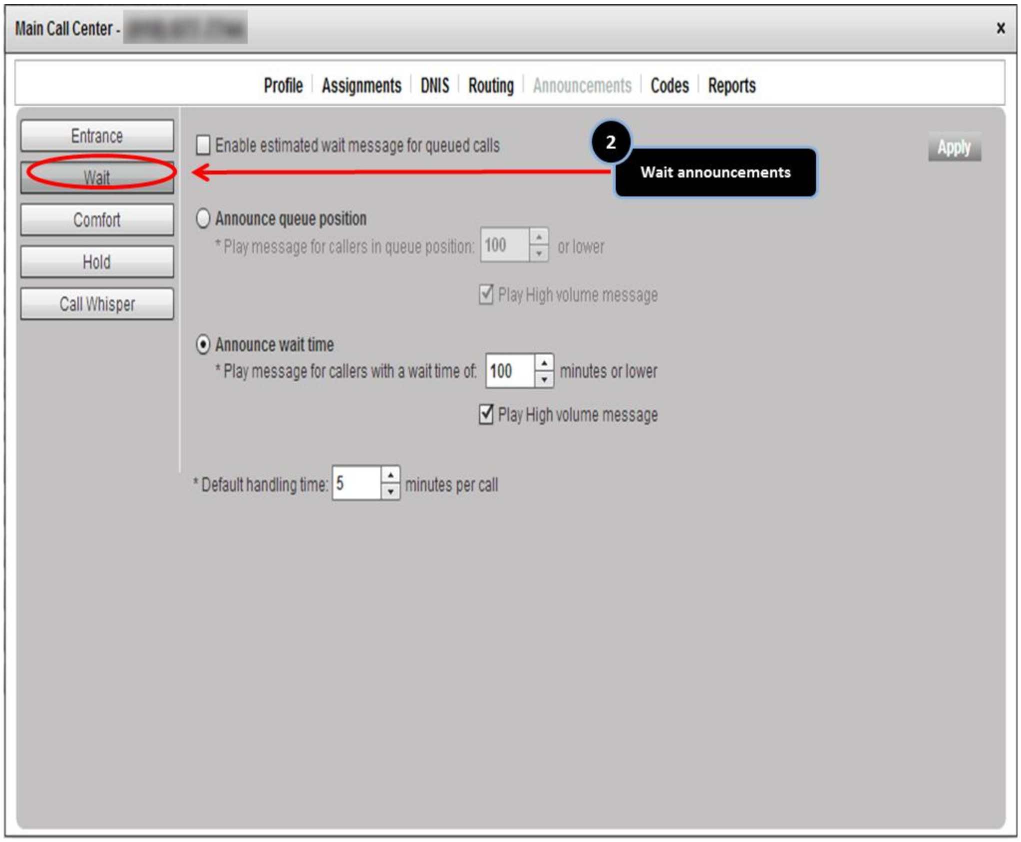
☐ Play Entrance Message

☐ Entrance message is mandatory when played

○ Default ● Custom

File #	Description	File Name
1	entrance	heart.wav
2		
3		
4		

1. Entrance - an entrance message is the first message played for callers joined into the Call Center.
    - Play Entrance Message – Check the box to play a message when there are no agents available and are placed in the queue to wait for an available agent.
    - Entrance message is mandatory when played – Check box to play the entrance message for all callers, even if there are available agents.
    - Select the Default or Custom announcement. See Steps 8.3 and 8.4 above for details on uploading the custom announcement(s).
2. Wait


Main Call Center - [redacted]
×
Profile
Assignments
DNIS
Routing
Announcements
Codes
Reports
Entrance
Wait
Comfort
Hold
Call Whisper
Apply
2
Wait announcements

☐ Enable estimated wait message for queued calls

○ Announce queue position

* Play message for callers in queue position: 100 or lower

☑ Play High volume message

● Announce wait time

* Play message for callers with a wait time of: 100 minutes or lower

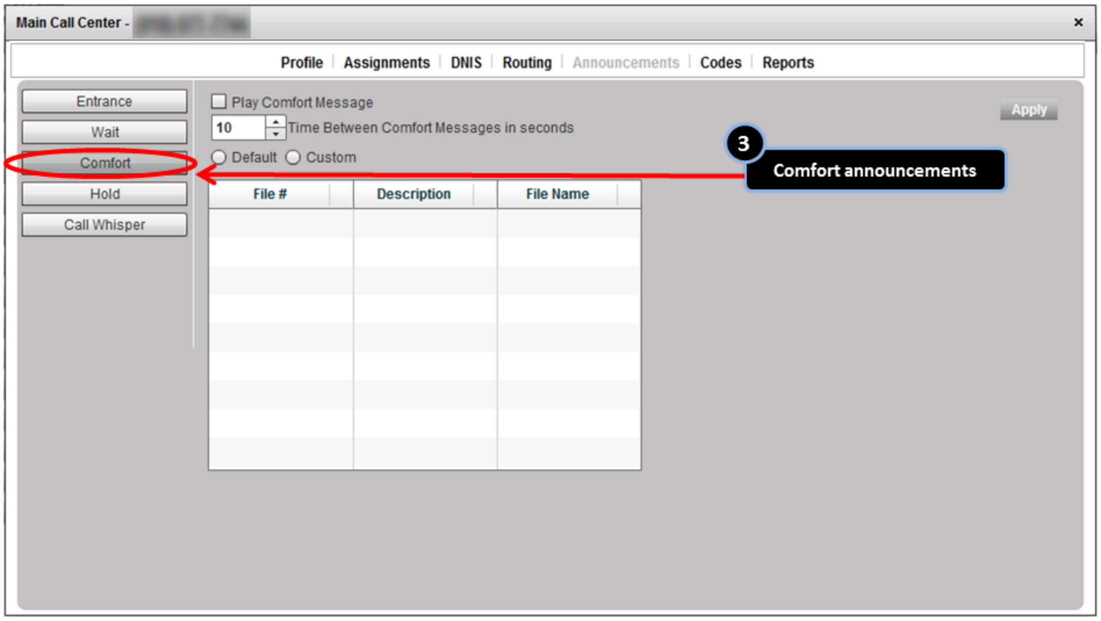
☑ Play High volume message

* Default handling time: 5 minutes per call

- Enable estimated wait message for queued calls – check box to play a message with the estimated wait time or queue position to the callers in the queue. You must choose one or the other. This message will play after the entrance message.
  - Announce queue position – Announces how many callers are in the queue in front of the caller. Enter the maximum queue position to play this announcement. The number must be from 1 through 100.
  - Announce wait time – Announces the estimated time a caller will wait in queue before an agent is available to pick-up the call. Enter the maximum time in minutes of wait time to play this announcement. The number must be from 1 through 100.

    Also enter the default handling time in minutes per call which will be used to calculate the average wait time.

3. Comfort Message


Main Call Center - [redacted]
×
Profile | Assignments | DNIS | Routing | Announcements | Codes | Reports
Entrance
Wait
Comfort
Hold
Call Whisper
Apply
3

☐ Play Comfort Message

10 Time Between Comfort Messages in seconds

○ Default ○ Custom

File #	Description	File Name

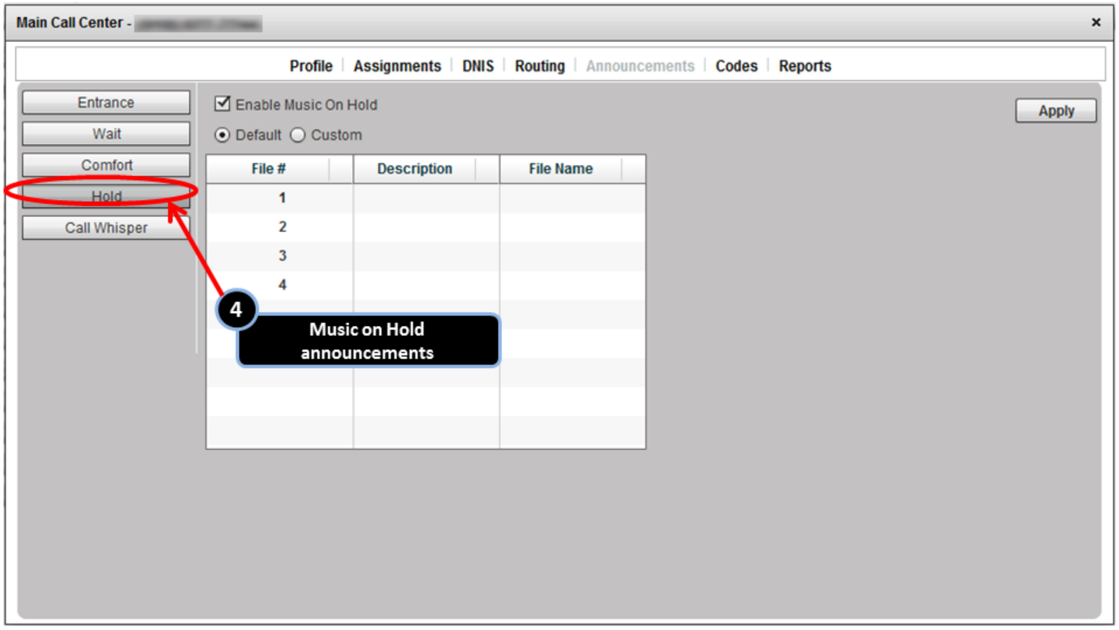
Comfort announcements

A comfort message is an announcement played to callers waiting in queue at a defined interval. It is intended to reassure the caller that their call will be answered soon and hopefully on the line.

- Play Comfort Message - Check the box to enable a comfort message.
- Time Between comfort Messages in seconds – enter the length of time in seconds between the playing of comfort messages
- Select the Default or Custom announcement. See Steps 8.3 and 8.4 above for details on uploading the custom announcement(s).

4. Hold

This configures music on hold for the callers waiting in the Call Center queue.


Main Call Center - [redacted]
×
Profile | Assignments | DNIS | Routing | Announcements | Codes | Reports
Entrance
Wait
Comfort
Hold
Call Whisper
Apply
4

☑ Enable Music On Hold

● Default ○ Custom

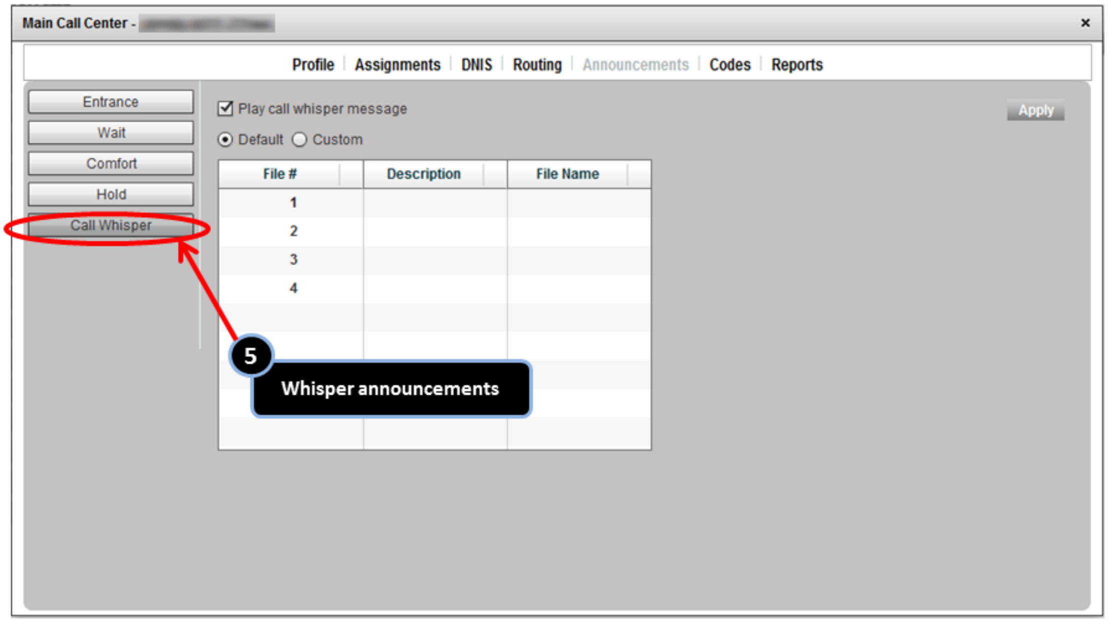
File #	Description	File Name
1		
2		
3		
4		

Music on Hold announcements

- Enable Music on Hold – Check the box to enable music on hold

- Select the Default or Custom announcement. See Steps 8.3 and 8.4 above for details on uploading the custom announcement(s).

5. Call Whisper


Main Call Center - [redacted]
×
Profile
Assignments
DNIS
Routing
Announcements
Codes
Reports
Entrance
Wait
Comfort
Hold
Call Whisper
Apply
5
Whisper announcements

☑ Play call whisper message

● Default ○ Custom

File #	Description	File Name
1		
2		
3		
4		

A Call Whisper Message is a short announcement that gets played to the agent when they answer a call from the Call Center. This could be used to let them know that the incoming call is coming from the queue instead of a direct call to their extension or to identify the specific Call Center that is routing them the call if they are an agent in multiple call centers at the same time.

- Play call whisper message – Check the box to enable a call whisper message.
- Select the Default or Custom announcement. See Steps 8.3 and 8.4 above for details on uploading the custom announcement(s).

Step 10. Codes

1. Disposition Codes

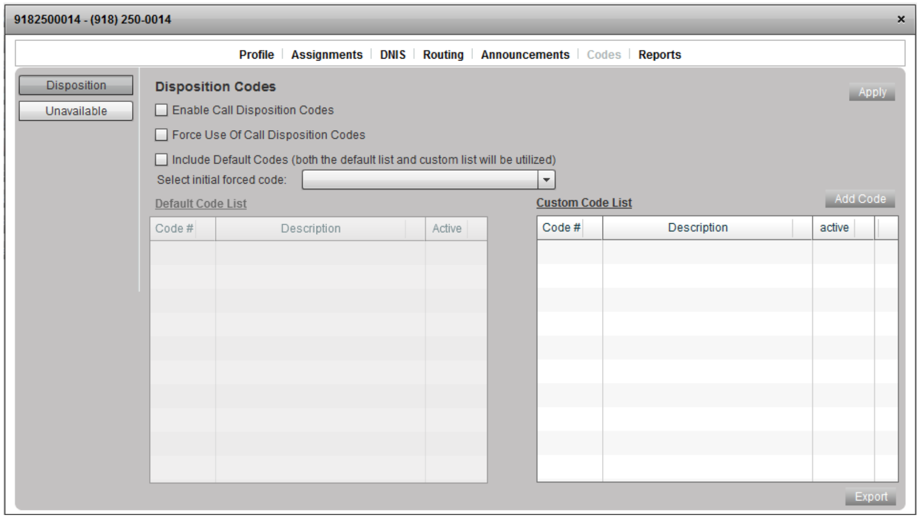
Agent Disposition Codes are codes to track the outcome or status of a call by the Call Center agent. Users logged in to the Agent client may assign a Disposition Code when in Wrap Up state of a particular call. The codes can be used in Reporting to see an overall view of disposition statuses or track historical trends.

Default codes are system defined codes that can be used by call customers if applicable. Customer codes defined by the customer and can be tailored to their specific business needs.

Default codes are listed below:

Code #	Description
1000	Abandoned On Answer
1001	Appointment Scheduled
1002	Billing Question
1003	Callback AM
1004	Callback PM
1005	Callback Weekend
1006	Caller Hung Up
1007	Cancellation
1008	Change Request
1009	Complaint
1010	Complete
1011	Follow Up Required
1012	Incorrect Number
1013	Issue Resolved
1014	New Order
1015	Product Question
1016	Refund Request
1017	Reservation Complete
1018	Response to Advertising
1019	Sale Closed
1020	Sale Pending
1021	Software Error
1022	Supervisor Attention Required
1023	Technical Support Question
1024	Trouble Ticket Opened

Codes 1025-1049 are reserved. Codes 1050-1099 may be customized.



Disposition Codes

☐ Enable Call Disposition Codes

☐ Force Use Of Call Disposition Codes

☐ Include Default Codes (both the default list and custom list will be utilized)

Select initial forced code:

Default Code List

Code #	Description	Active

Custom Code List

Code #	Description	active

Unavailable Codes

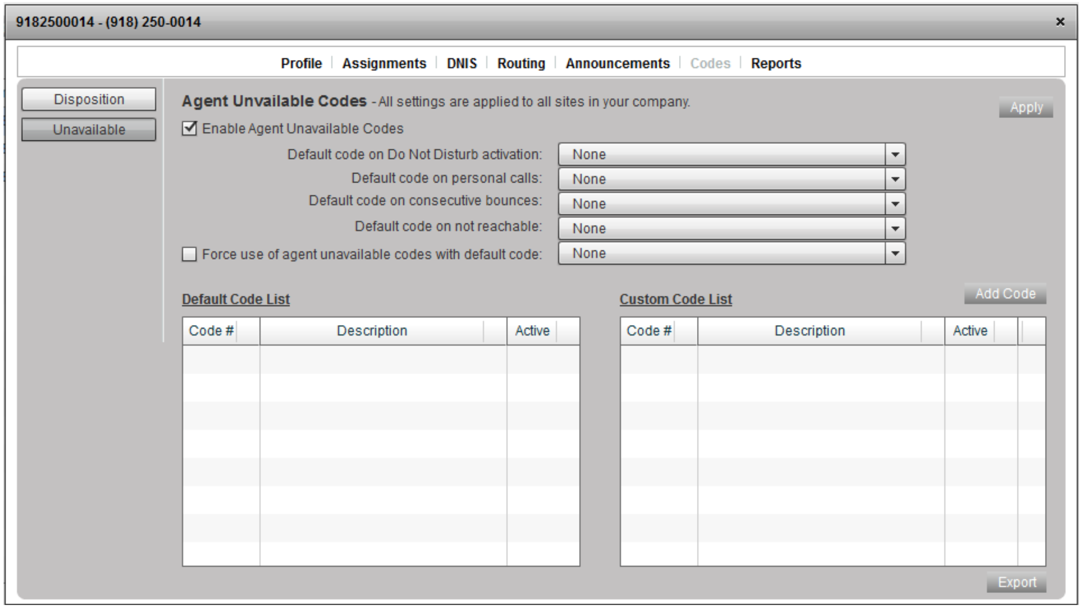
Unavailable Codes are used to track reasons why Call Center agents go into an “unavailable” status which remove their stations from the call queue and not receive calls. The codes can be used in Reporting to see an overall view of unavailable statuses or track historical trends.

Default codes are system defined codes that can be used by call customers if applicable. Customer codes defined by the customer and can be tailored to their specific business needs.

Default codes are listed below:

Code #	Description
2000	Additional Disposition Time
2001	At Lunch
2002	Beginning of Shift
2003	Coaching
2004	Do Not Disturb
2005	End of Shift
2006	In Training
2007	Mentoring: Agent to Agent
2008	Mentoring: Supervisor to Agent
2009	On Coffee Break
2010	On Conference Call
2011	On Internal Call
2012	On Personal Break
2013	On Personal Call
2014	Other Work
2015	Technical Difficulties

Codes 2016-2049 are reserved. Codes 2050-2099 may be customized in My Site to meet a customer’s business needs.


9182500014 - (918) 250-0014
Profile | Assignments | DNIS | Routing | Announcements | Codes | Reports
Disposition
Unavailable
Apply
Add Code
Export

Agent Unvailable Codes - All settings are applied to all sites in your company.

☑ Enable Agent Unavailable Codes

Default code on Do Not Disturb activation: None
Default code on personal calls: None
Default code on consecutive bounces: None
Default code on not reachable: None
☐ Force use of agent unavailable codes with default code: None

Default Code List

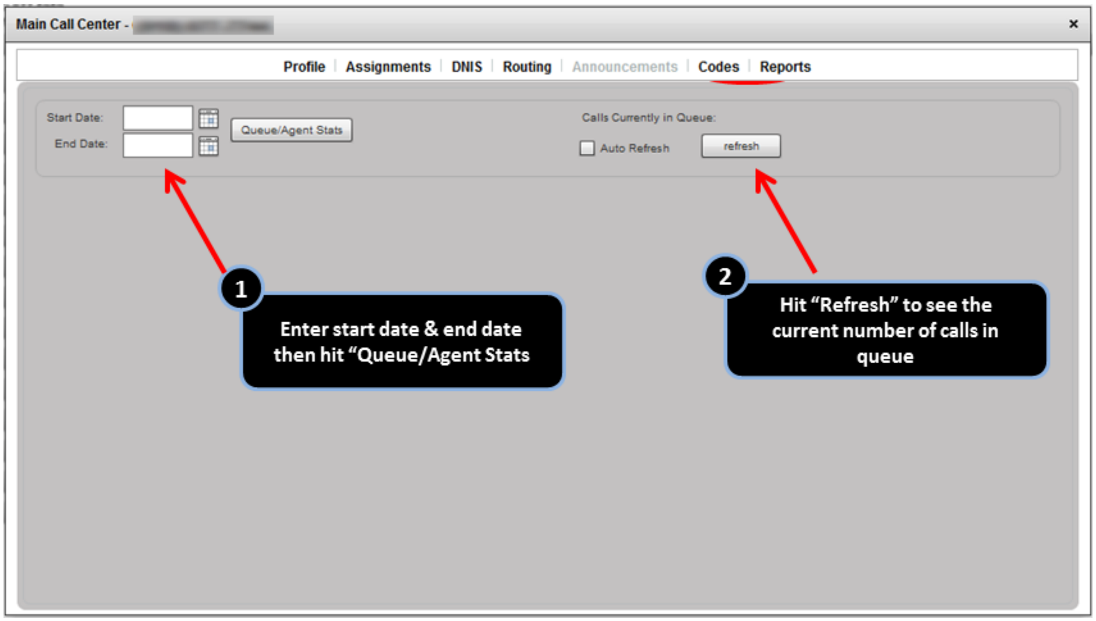
Code #	Description	Active

Custom Code List

Code #	Description	Active

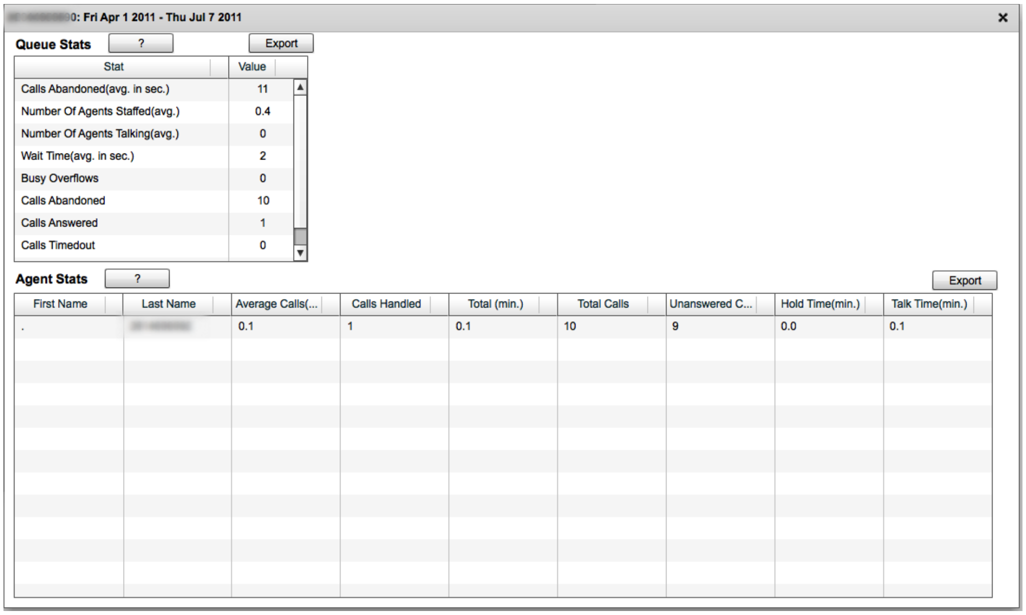
Step 11. Reports

Reporting in the Configuration screen/Reports tab shows up to 48 hours of historical data.


Main Call Center - [redacted]
Profile | Assignments | DNIS | Routing | Announcements | Codes | Reports
Start Date:
End Date:
Queue/Agent Stats
Calls Currently in Queue:
☐ Auto Refresh
refresh
1
Enter start date & end date then hit "Queue/Agent Stats
2
Hit "Refresh" to see the current number of calls in queue

1. Enter the Start Date and End Date and then hit the "Queue/Agent Stats button
2. Refresh – this button will show the current number of calls in queue. Check the "Auto Refresh" box to automatically update the current calls in queue.

Queue/Agent Stats screen



[redacted]0: Fri Apr 1 2011 - Thu Jul 7 2011

Queue Stats

Stat	Value
Calls Abandoned(avg. in sec.)	11
Number Of Agents Staffed(avg.)	0.4
Number Of Agents Talking(avg.)	0
Wait Time(avg. in sec.)	2
Busy Overflows	0
Calls Abandoned	10
Calls Answered	1
Calls Timedout	0

Agent Stats

First Name	Last Name	Average Calls(...	Calls Handled	Total (min.)	Total Calls	Unanswered C...	Hold Time(min.)	Talk Time(min.)
.	[redacted]	0.1	1	0.1	10	9	0.0	0.1

- Queue Stats (Overall Queue metrics)
    - Calls Abandoned (avg. in sec) – Avg. Time callers spent waiting until they abandoned their call
    - Number of Agents Staffed(avg.) - Average number of assigned agents to queue for the period requested
    - Number of Agents Talking(avg.) – Average number of agents in an active conversation for the period of time requested
    - Wait Time(avg. in sec.) – Average amount of time in seconds a caller is held in queue prior to agent answering
    - Busy Overflows – Number of calls that came in after queue limit was met
    - Calls Abandoned – Total # of calls that were terminated by the caller prior to speaking to an agent
    - Calls Answered – Total number of calls answered by agents
    - Calls Timed Out – Total number of call that remained unanswered and were forwarded out of the queue upon timeout
    - Calls Transferred – Total number of calls transferred out of the queue
- Agent Stats (Agent specific metrics)
    - Average Calls(min) – Average time in minutes agent spends on calls from the queue
    - Calls Handled – Total number of calls handled by the agent
    - Total(min.) – Total amount of time the agent was busy handling calls out of this queue
    - Total Calls – The total number of calls the agent has handled
    - Unanswered Calls – Total number of calls extended to the agent (phone rings) that were not answered
    - Hold Time(min.) – Total amount of time in minutes an agent locally held active calls on hold
    - Talk Time(min.) – Total amount of time in minutes an agent was actively talking on a call