

CLOUD VOICE CALL CENTER

Application user guide

December 2020

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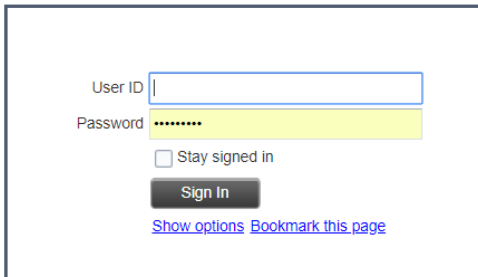
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Start-up and Login

To log in, navigate to the webpage by launching the application from the Business Portal or by navigating to the following URL:

[https://applications.yourwhc.co.uk/call centre](https://applications.yourwhc.co.uk/call%20centre)



User ID

Password

Stay signed in

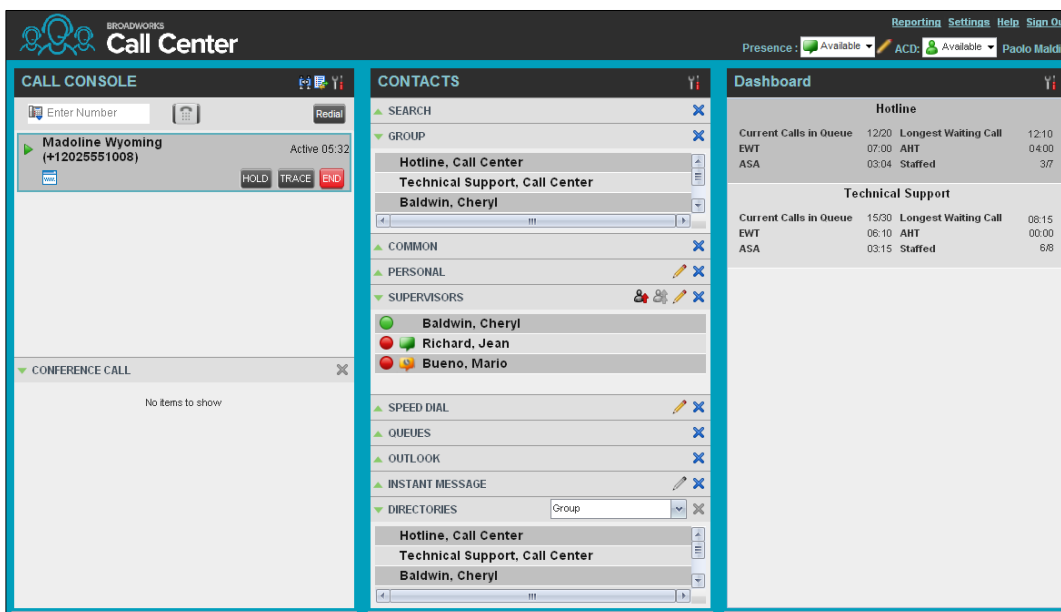
[Show options](#) [Bookmark this page](#)

Enter your Username and Password for the application, followed by the **Sign In** button. Please note you can only have 1 active session per username, if you log in from a second device or browser with the same user name, it will automatically log out the first location.

To log out, simply select **Sign Out**.

Start-Up Window

When you sign in to Call Centre, 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 Centre, where you perform functions such as configuration and report generation.



The screenshot displays the Call Center application interface. At the top, there is a navigation bar with 'Reporting', 'Settings', 'Help', and 'Sign Out' options. The user's presence is shown as 'Available' and their name as 'Paolo Maldini'. The main workspace is divided into three panels:

- CALL CONSOLE:** Shows an active call for 'Madoline Wyoming (+12025551008)' with buttons for 'HOLD', 'TRACE', and 'END'. Below it, a 'CONFERENCE CALL' section is empty.
- CONTACTS:** A list of contacts including 'Hotline, Call Center', 'Technical Support, Call Center', and 'Baldwin, Cheryl'. It also lists supervisors: 'Baldwin, Cheryl', 'Richard, Jean', and 'Bueno, Mario'.
- Dashboard:** Displays call statistics for 'Hotline' and 'Technical Support'.

| | Current Calls in Queue | Longest Waiting Call | 12:10 |
|---------|------------------------|----------------------|---------|
| Hotline | 12:20 | 07:00 | 04:00 |
| EWT | | 03:04 | Staffed |
| ASA | | | 3/7 |

| | Current Calls in Queue | Longest Waiting Call | 08:15 |
|-------------------|------------------------|----------------------|---------|
| Technical Support | 15:30 | 06:10 | 00:00 |
| EWT | | 03:15 | Staffed |
| ASA | | | 6/8 |

Many visual aspects of the Call Centre 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.

To work in full screen mode, click the Full Screen link at the top-right corner of the main window. The link changes to Exit Full Screen, which you can click to exit full screen mode.

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Notes:

1. To work in full screen mode, you can also click F11 when the main window is in focus.
2. The Back, Forward, and Refresh operations of the web browser are not supported by Call Centre, and if performed, the results are inconsistent.
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 centre 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. The action buttons are described in section Call Action Buttons.

The Call Centre 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 Centre 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. |
| Queued Calls Pane (Supervisors) | The Queued Calls pane, available only to supervisors, allows you to manage queued calls for selected call centres that you supervise. |
| Chat Windows | You chat with your IM&P contacts using Chat windows. |
| 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. |
| Dashboard (Supervisors) | The Dashboard, accessible from the main page via the Dashboard link, provides you with real-time summary information about the call centres and agents you supervise (up to 50). |
| Dashboard Pane (Agent) | The Dashboard pane allows you to view the current state of the monitored call centres. |
| Settings Pages | The Settings pages, accessible from the main page via the Settings link, allow you to con 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 Centre interface:

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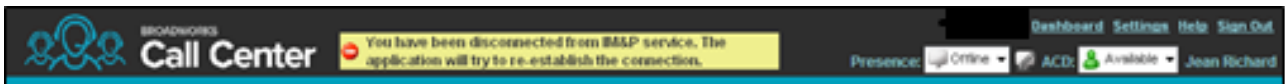
- Logo Pane
- Call Console
- Contacts Pane
- Call History
- Controls

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

- Queued Calls
- Chat windows: Chat with IM&P Contacts p49
- Dashboard pane: View Real-Time Statistics (Supervisor) p69
- Monitor Call Centres (Agent)

Logo Pane

The Call Centre main window interface contains a logo pane that displays the Call Centre client or company logo, global messages, links to other interface elements or Call Centre functions, and information about the logged-in user. The *Logo* pane displays links to the *Settings* pages, the *Dashboard* (Supervisors), and the Help and Sign Out links.



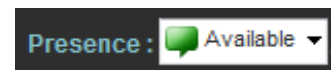
Global message area

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

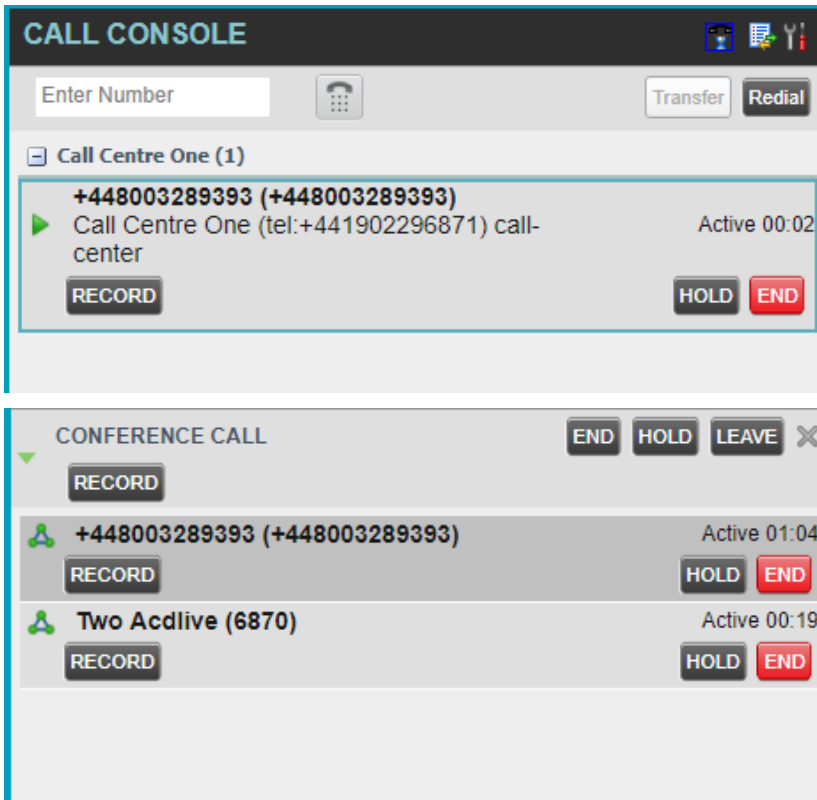
Logged User Information

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

You're current ACD state and presence state are displayed to the left of your name. You can change your ACD state or presence state by selecting a new state from the drop-down list.



Call Console



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

The *Call Console* contains the following areas:



- Header Bar
- Dialler
- Current Calls
- Conference Call
- Call states and actions

Header Bar

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



The header bar can contains the following controls:

-  Call History button: This allows you to access the list of your previous calls.
-  Call Waiting button: This allows you to enable or disable the Call Waiting service.

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Dialler

The *Dialler*, located at the top of the *Call Console*, below the header bar, allows you to make ad hoc calls.



It contains the following elements:

- The Enter Number text box, which is where you enter the number to dial.
- Action buttons, which change depending on the context, and they allow you to perform operations on calls.

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 centre 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.

The following information is displayed for each call:

- Call State icon – This is a visual representation of the current state of the call.
- Diversion CLID – This is the name (if available) of the party who diverted (transferred, forwarded) the call before you received the call and the phone number is in parenthesis. If the call was diverted more than once, the last party who diverted the call is listed first; the second to last party is listed second; and so on.
- 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 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.

Conference Call (Three way calling).

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.

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.

Call States and Actions

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

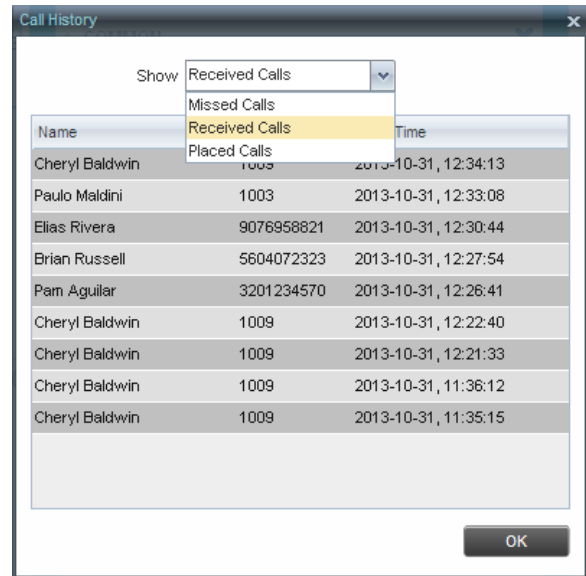
| Call State | Display Name | Display Icon | Call Personality | Call Actions |
|----------------------------|----------------|--------------|------------------|-----------------------------------|
| Ringing In (Local) | Incoming Local | | Click-To-Dial | Answer, End |
| Ringing In (Remote) | Incoming | | 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 |
| 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 |

Call History

The *Call History* dialog box, accessed from the *Call Console* via the Call History button, allows you to view your past calls. You can place a call to a number from Call History and manage call logs.

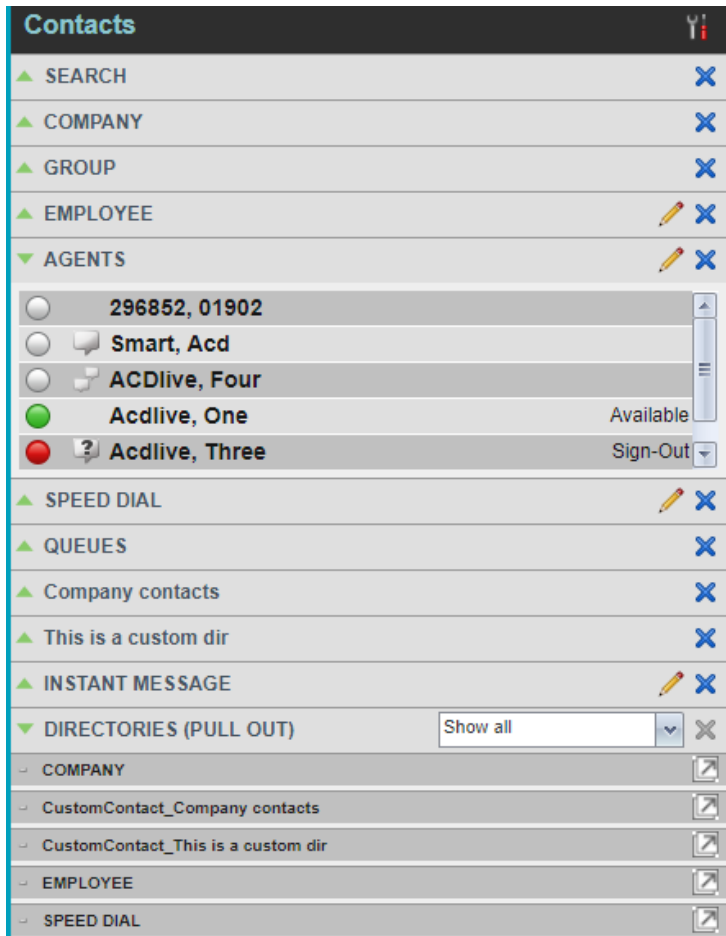
Each call log is displayed on a separate line. Call logs are grouped in three categories: Missed calls, Received calls, and Placed calls. The following information is displayed for each call log:

- The name and phone number of the remote party
- The date and time when the call was initiated



Contacts Pane

The *Contacts* pane contains your contact directories and allows you to use your contacts to make or manage calls.

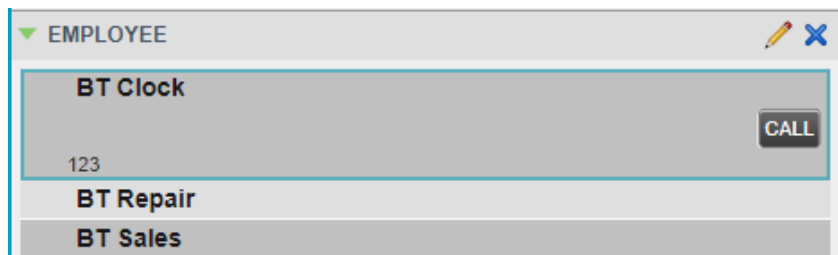


The *Contacts* pane contains the following panels:

- Search Panel
- Company Panel
- Group Panel
- Employee Panel
- Agents Panel (Supervisors)
- Supervisors Panel (Agents)
- Speed Dial Panel
- Queues Panel
- Outlook Panel
- Instant Message Panel
- Directories Panels

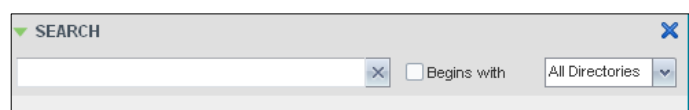
The *Outlook* panel contains your Outlook contacts.

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.



Search Panel

You use the *Search* panel to look for specific contacts in your contacts' directories and, if available, in the configured *LDAP* directory.



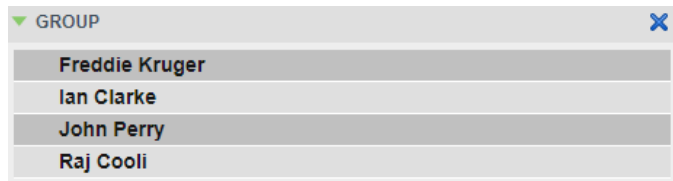
Company Panel

The *Company* panel contains the contacts in your Business Portal Company directory.



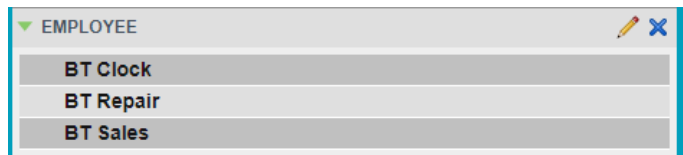
Group Panel

The Group panel contains the contacts in your Business Portal Group directory.



Employee Panel

The *Employee* panel contains the contacts in your Business Portal Personal directory.



Agents Panel (Supervisors)

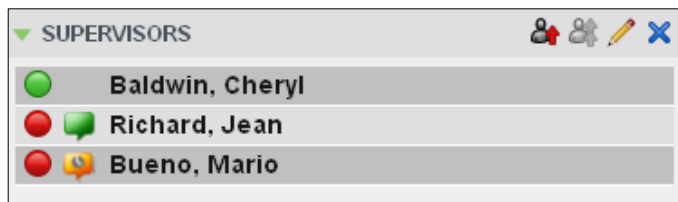
The *Agents* panel is used by supervisors to monitor and manage agents under their supervision.



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Supervisors Panel (Agents)

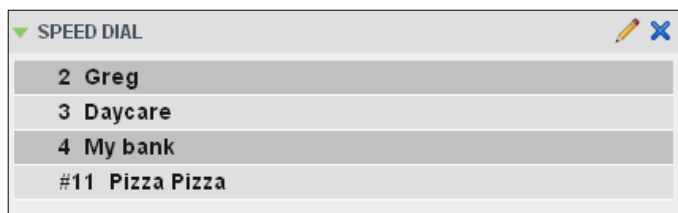
The *Supervisors* panel, available to agents, contains the list of your supervisors. The main purpose of this directory is to allow you to contact a supervisor quickly.



Selected supervisors have their call status displayed.

Speed Dial Panel

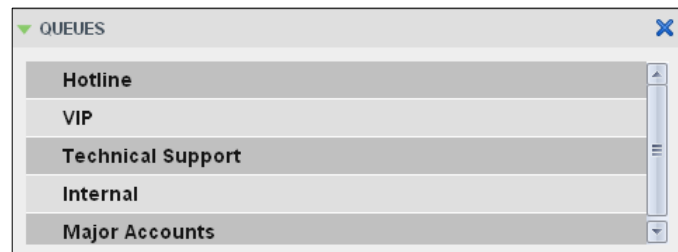
The *Speed Dial* panel allows you to manage your Speed Dial 8 and Speed Dial 100 contacts. It is available to users who have been assigned Speed Dial 8 and/or Speed Dial 100 services.



If you only have one of these services, you only see the entries for that service in your *Speed Dial* directory. For each configured speed dial number, Call Centre displays the speed dial code and description. The description is what you entered when configuring the number.

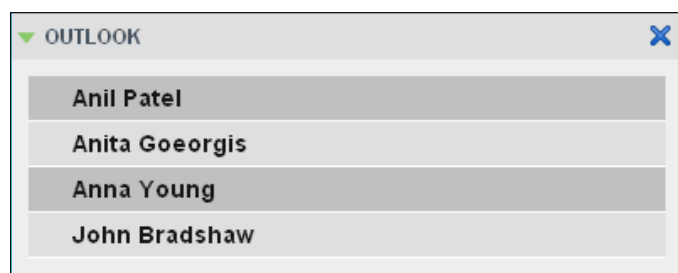
Queues Panel

The *Queues* panel is available to both agents and supervisors. It lists the call centres 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.



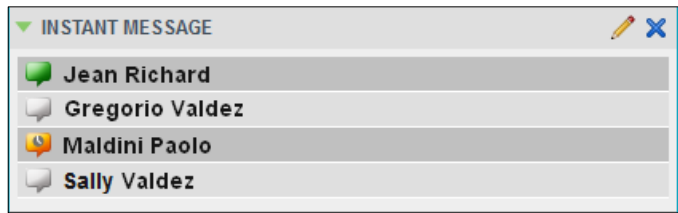
Outlook Panel

The *Outlook* panel contains your Outlook contacts.



Instant Message Panel

The *Instant Message* panel displays IM&P contacts you are subscribed to and their presence state. You can chat with any contact that has an IM&P service assigned on BroadWorks, but you can only see the presence state of the contacts to which you are subscribed.

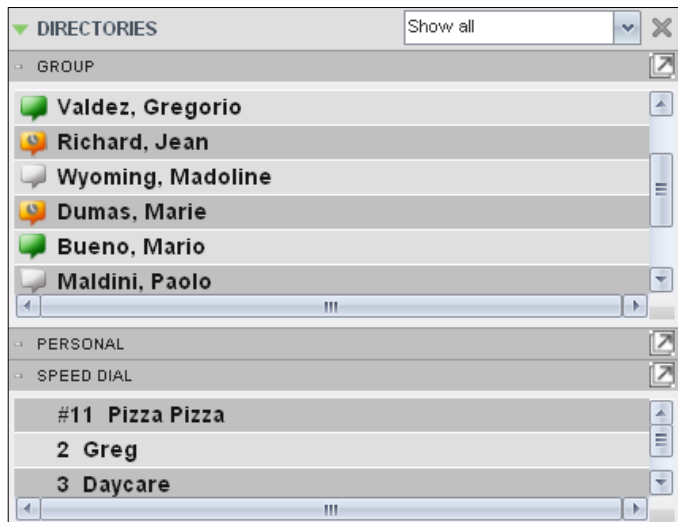


The *Instant Message* panel appears only if you have been assigned an IM&P service, i.e. UC Office Business or Teams.

Directories Panel (Pull Out)

The *Directories* panel consolidates the contacts from the following directories: *Company*, *Site*, *Employee*, *Outlook*, and *Speed Dial*. 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.






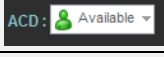











You can also place a copy of a directory below the *Call Console* by clicking the *pull-out directory icon*













Controls

Call Centre 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 dialling, transferring calls, or putting calls on hold are called action buttons. They appear on the Dialler, in a call entry, in a directory entry (contact), in a call log, or on a queued call (Supervisors).

The following table lists the general controls used in Call Centre and the controls displayed on the headers in the panels.

| Name | Description |
|--|---|
| Common Controls | |
|  Options | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> This shows or hides the contents of a window or panel. |
|  Close | <ul style="list-style-type: none"> This closes an interface element, such as window, pane, or panel. |
|  Edit | <ul style="list-style-type: none"> This allows you to edit a list of items, such as agents to monitor or speed dials. |
| Logo Bar, Dialler, Call Console, Directories Panel, and Search Panel Controls | |
|  Web Pop URL | <ul style="list-style-type: none"> This opens a page in your browser at the configured URL to provide additional information about the caller. |
|  ACD State | <ul style="list-style-type: none"> This displays your current ACD state and allows you to change it. |
|  Presence State | <ul style="list-style-type: none"> This displays your current IM&P presence state and allows you to change it using the drop-down list. |
|  Call History | <ul style="list-style-type: none"> This displays Call History. |
|  Auto Answer | <ul style="list-style-type: none"> This allows you to turn Auto Answering on or off. |
|  Call Waiting | <ul style="list-style-type: none"> This allows you to turn Call Waiting on or off. It is available only if you have been assigned the Call Waiting service. |
|  End Conference | <ul style="list-style-type: none"> This ends a conference call. |
|  Leave Conference | <ul style="list-style-type: none"> This disconnects you from the conference while allowing other participants to continue the call. |
|  Hold Conference | <ul style="list-style-type: none"> This holds the conference call. |
|  Resume Conference | <ul style="list-style-type: none"> This resumes a held conference. |
|  Pull Out Directory | <ul style="list-style-type: none"> This places a selected directory below the Call Console. |
| Call Notification Pop-up Window | |
|  Web Pop URL | <ul style="list-style-type: none"> This opens a page in your browser at the configured URL to provide additional information about the caller. |
|  vCard | <ul style="list-style-type: none"> This saves the caller's phone number and personal information as a vCard in Microsoft Outlook. It appears only when Outlook is running. |

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| Name | Description |
|--|---|
| Chat Window | |
|  Call | <ul style="list-style-type: none"> This places a call to your chat partner. |
|  Add User to Chat | <ul style="list-style-type: none"> This allows you to select users to add to the chat. |
|  Invite | <ul style="list-style-type: none"> This invites selected users to the chat. |
|  Pop-out | <ul style="list-style-type: none"> This takes a chat window out of the main interface and makes it a free-floating window. |
|  Pop-in | <ul style="list-style-type: none"> This anchors a free-floating chat window inside the main interface. |
|  Minimize | <ul style="list-style-type: none"> This minimizes the chat window. |
|  Close | <ul style="list-style-type: none"> This closes the chat window. |
| Supervisors Panel (Agents) | |
|  Emergency | <ul style="list-style-type: none"> This makes an emergency call to a supervisor. |
|  Escalate | <ul style="list-style-type: none"> This escalates a call to a supervisor. |
| Queued Calls Pane – Call Centre Queue Panel (Supervisors) | |
|  Service Mode | <ul style="list-style-type: none"> This identifies and allows you to change the service mode of a supervised call centre. |

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 dialling a number or contact. They appear on the Dialler, 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 button appears on the line for that contact, allowing you to call the contact. Note that other buttons may appear on the line for a contact, depending on the call state and the contact's configuration.

The following table lists the action buttons available in Call Centre:

| Button | Description |
|--|--|
|  Dial | <ul style="list-style-type: none"> This dials the number you entered in the <i>Dialler</i>. |
|  Call | <ul style="list-style-type: none"> This places a call to the selected contact or to a number from Call History. |
|  Redial | <ul style="list-style-type: none"> This redials the last dialled number. |
|  E-mail | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> This transfers a call to an ad hoc number entered in the Dialler. |
|  Transfer | <ul style="list-style-type: none"> This transfers a call to a selected number or contact. |
|  Answer | <ul style="list-style-type: none"> This answers an incoming call, answers an unanswered call for a contact, or resumes a held call. |
|  Hold | <ul style="list-style-type: none"> This places a call on hold. |
|  End | <ul style="list-style-type: none"> This ends a call. |
|  Conference | <ul style="list-style-type: none"> This establishes a conference call or adds a call to a conference. |
|  Stop | <ul style="list-style-type: none"> Ends call recording. |
|  Escalate Call | <ul style="list-style-type: none"> This escalates a call to a selected supervisor. |
|  Emergency Call | <ul style="list-style-type: none"> This places an emergency call to a selected supervisor. |
|  Chat | <ul style="list-style-type: none"> This opens a chat window allowing you to chat with an IM&P contact. |

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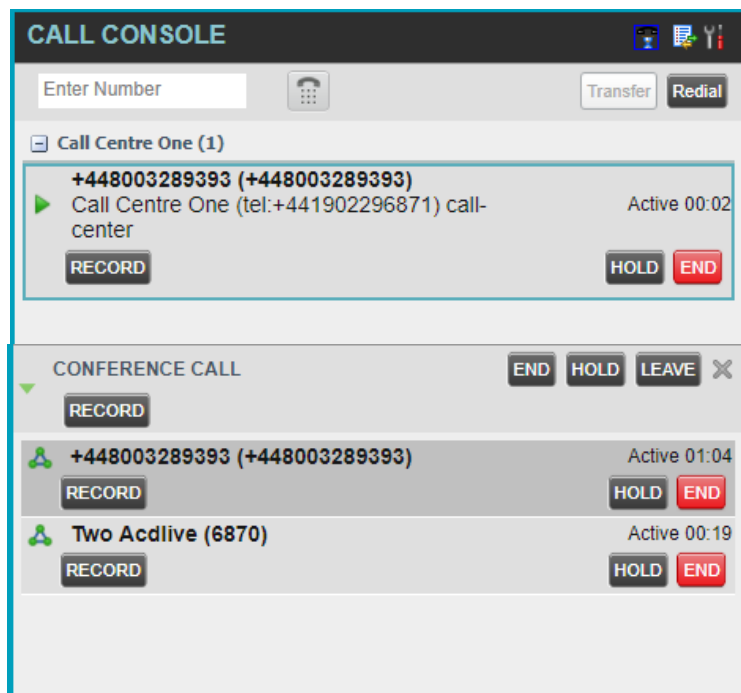
| Button | Description |
|---|--|
|  Web Pop URL | <ul style="list-style-type: none">This opens a page in your browser at the configured URL to provide additional information about the caller. |
|  Delete Call Log | <ul style="list-style-type: none">This deletes a call log from Call History. |
| For Supervisors Only | |
|  Queue | <ul style="list-style-type: none">This allows the supervisor to make an agent join or leave queues. |
|  ACD State | <ul style="list-style-type: none">This allows the supervisor to change a selected agent's ACD state. |
|  Barge In | <ul style="list-style-type: none">This allows the supervisor to barge in on an agent's call, by establishing a Three-Way Call between the supervisor and the two parties involved in the call. |
|  Answer | <ul style="list-style-type: none">This answers an unanswered call for a monitored agent. |
|  Retrieve | <ul style="list-style-type: none">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 <i>Incoming</i> call rather than an <i>ACD</i> call in the reports. |
|  Reorder | <ul style="list-style-type: none">This changes a call's position in the queue. |

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.



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 *Drag and Drop Call onto Contact*.

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 | <ul style="list-style-type: none"> In the <i>Call Console</i>, click Answer for the target call. |
| Open URL | <ul style="list-style-type: none"> In the <i>Call Notification</i> dialog box for an incoming call or on any call in the <i>Call Console</i>, click the Web Pop URL button. |
| Place Call on Hold | <ul style="list-style-type: none"> In the <i>Call Console</i>, move the mouse over the call and click Hold. |
| Resume Held Call | <ul style="list-style-type: none"> In the <i>Call Console</i>, move the mouse over the call and click Retrieve. |
| Blind Transfer Call | <ul style="list-style-type: none"> Drag the call onto the target contact and click Transfer for that contact. Alternatively, enter the target number in the <i>Dialler</i> and click Transfer on the <i>Dialler</i>. |
| Transfer with Consultation | <ul style="list-style-type: none"> While on the call, enter a number in the <i>Dialler</i> or select a contact in the <i>Contacts</i> 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 | <ul style="list-style-type: none"> Drag the call onto the target queue in the <i>Queues</i> panel and click Transfer for that queue. |

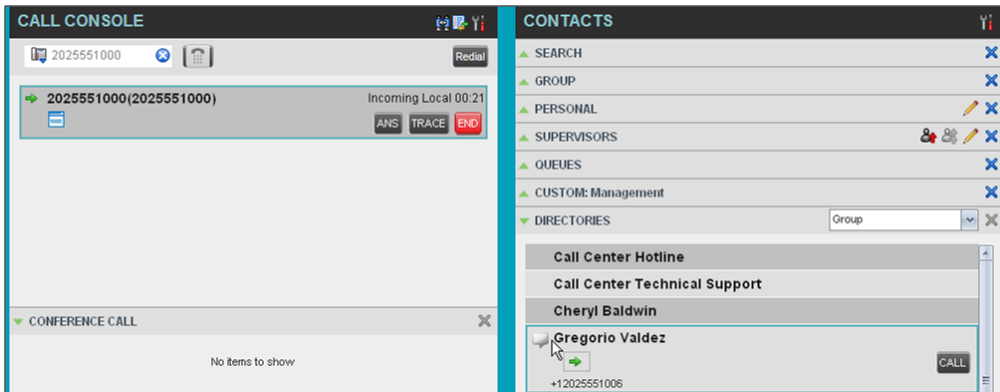
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| | |
|---|---|
| Make Emergency Call to Available Supervisor | <ul style="list-style-type: none"> In the <i>Call Console</i>, select the call to escalate and click the Emergency button in the <i>Supervisors</i> panel. |
| Make Emergency Call to Selected Supervisor | <ul style="list-style-type: none"> Drag the call to escalate onto an available supervisor in the <i>Supervisors</i> panel and click Emergency for that supervisor. |
| Blind Escalate Call | <ul style="list-style-type: none"> In the <i>Call Console</i>, select the call to escalate. In the <i>Supervisors</i> panel, click Escalate or click an available supervisor and click Escalate for that supervisor. In the <i>Call Console</i>, move the mouse over the call to the supervisor and click Transfer before the supervisor answers the call. |
| Escalate with Consultation | <ul style="list-style-type: none"> In the <i>Call Console</i>, select the call to escalate. In the <i>Supervisors</i> panel, click Escalate or click an available supervisor and click Escalate for that supervisor. Consult with the supervisor. When ready to transfer, in the <i>Call Console</i>, move the mouse over the call to the supervisor and click Transfer. |
| Escalate with Conference | <ul style="list-style-type: none"> In the <i>Call Console</i>, select the call to escalate. In the <i>Supervisors</i> panel, click Escalate or click an available supervisor and click Escalate for that supervisor. In the <i>Call Console</i>, move the mouse over the new call and click Conference. |
| Start Three-Way Conference | <ul style="list-style-type: none"> In the <i>Call Console</i>, select a call. Move the mouse over a call that is not selected and click Conference. |
| Add Participant to Conference | <ul style="list-style-type: none"> In the <i>Call Console</i>, move the mouse over a call and click Conference. |
| Hold Conference | <ul style="list-style-type: none"> In the <i>Conference Call</i> panel, click Hold. |
| Resume Conference | <ul style="list-style-type: none"> In the <i>Conference Call</i> panel, click Resume. |
| Hold Conference Participant | <ul style="list-style-type: none"> In the <i>Conference Call</i> panel, select the call to put on hold and click Hold for that call. |
| Take Conference Participant Off Hold | <ul style="list-style-type: none"> In the <i>Conference Call</i> panel, select a held call and click Resume for that call. |
| Leave Conference | <ul style="list-style-type: none"> In the <i>Conference Call</i> panel, click Leave Conference. |
| End Participant | <ul style="list-style-type: none"> In the <i>Conference Call</i> panel, select the target call and click End. |
| End Conference | <ul style="list-style-type: none"> In the <i>Conference Call</i> panel, click End Conference. |
| Dial Ad Hoc Number | <ul style="list-style-type: none"> In the <i>Dialler</i>, enter the number to call and click Dial. |
| Re-dial Recent Number | <ul style="list-style-type: none"> In the <i>Dialler</i>, click Redial and select a number from the list. |
| Dial Recent Number | <ul style="list-style-type: none"> In the <i>Dialler</i>, 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 | <ul style="list-style-type: none"> In the <i>Contacts</i> pane, click the contact and then click Call for that contact. |
| Dial from History | <ul style="list-style-type: none"> In the <i>Call Console</i>, click the Call History button. Select <i>Missed calls</i>, <i>Received calls</i>, or <i>Dialled calls</i> from the drop-down list. In the <i>Call History</i> dialog box, move the mouse over a call log and click Call. |
| Dial from Search | <ul style="list-style-type: none"> In the <i>Search</i> panel, select a contact and click Dial. |

Drag and Drop Call onto Contact

In Call Centre, 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.

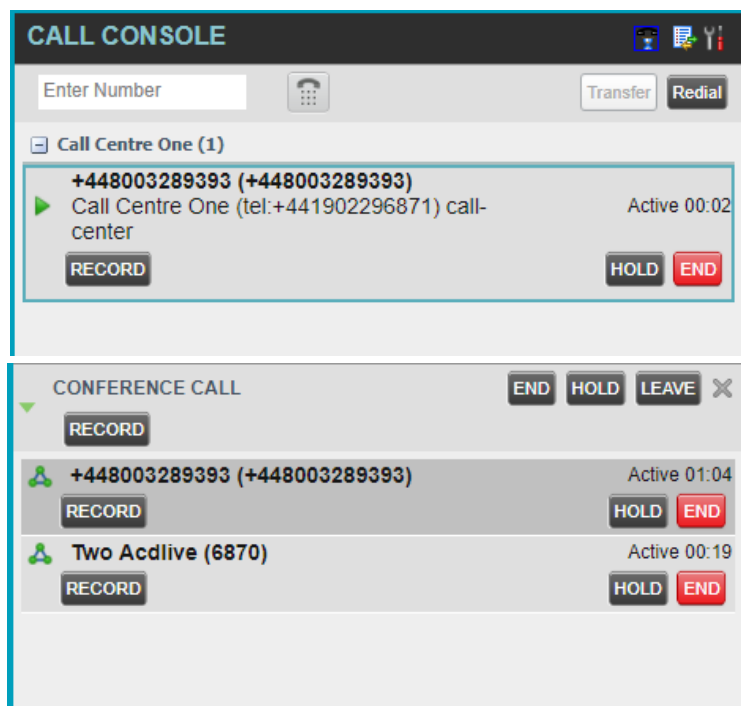


View Calls

You can view your current calls and your past calls (Call History.)

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*.

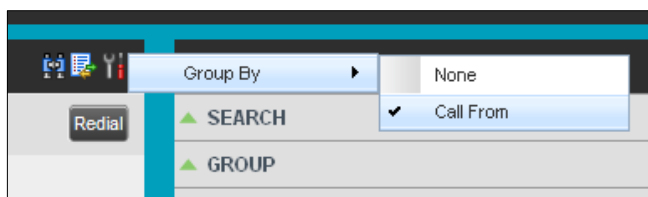


Group Calls


Your current calls can be grouped by the call centre they come from. When calls are grouped, direct calls are placed in a separate category.

To group or ungroup calls:

1. On the *Call Console* header bar, click **Options** .
2. Select *Group By* and then *Calls From*.
3. To ungroup, repeat the operation by selecting *None* instead of *Calls From*.



To view or hide calls in a group:

Click the **Show/Hide** button () to the left of the group name.

View Incoming Call Details

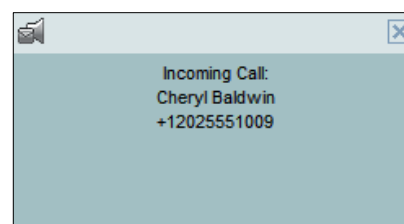
When you receive a new call, the call appears in the Call Console. If calls are grouped and the corresponding grouping is collapsed, it is expanded to make the call visible.

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

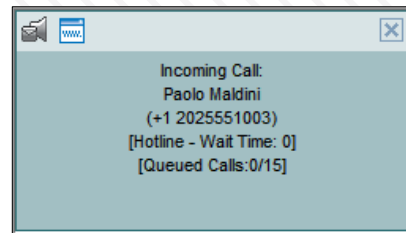


For calls from a call centre,

The following information is displayed:

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- Calling party name
- Calling party number
- Call centre name or DNIS name, followed by the time the call has been waiting in queue (wait time)
- Number of calls in queue (queued calls)

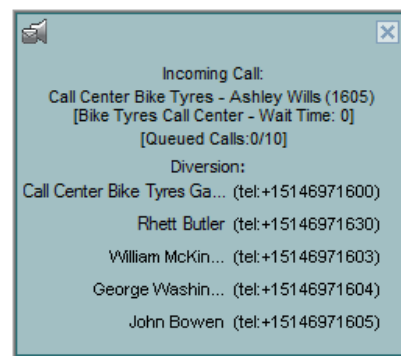


In addition, for diverted calls,

That is, calls that were forwarded or transferred before being delivered to you, the diversion information is also displayed.

Notes:

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



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.

Open URL

For any current call, you can open a page in your browser that contains information about the calling party encoded in its URL. This can be done either from the *Call Notification* pop-up window that appears on top of the system tray for an incoming call or from the *Call Console* for any current call.

This feature is configured on the *Settings – General* configuration page

To open a URL for an incoming call:

In the *Call Notification* pop-up window, click the **Web Pop URL** button .

To open a URL for any call:

In the *Call Console*, click the **Web Pop URL** button  for the target call.

End Call

To end a call:

Click End  for that call.

NOTE: If the call has not been answered yet, then the calling party continues to ring until there is no answer, until another applicable timer expires, or the user hangs up.

Make Outbound Calls


You can make calls to an ad hoc number, to a contact from any of your contacts' directories, or to a number from Call History.

Dial Ad Hoc Number

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



To dial an ad hoc number:

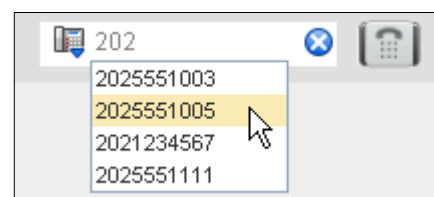
In the *Dialler*, enter the phone number and click **Dial** . The client issues a Click-To-Dial attempt to the specified phone number and the call appears in the *Call Console*.


Redial Number

Call Centre keeps up to ten most recently dialed numbers, which you can redial using the *Dialler*.

To redial one of the recently dialed numbers:

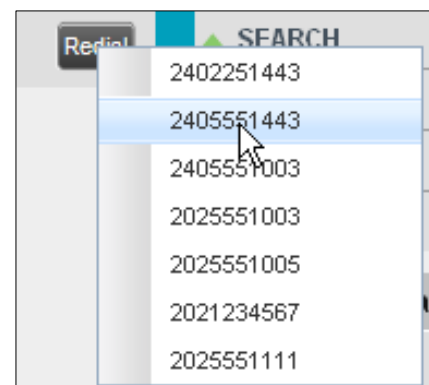
In the *Dialler*, place the cursor in the text box and start entering a number. A list of recently called numbers that start with the entered digits appears.



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.




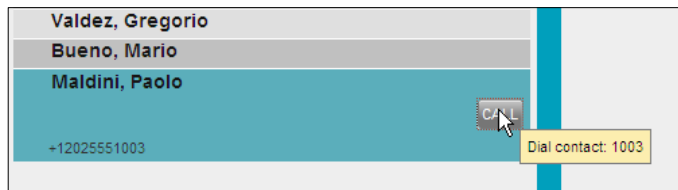
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Dial Contact

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

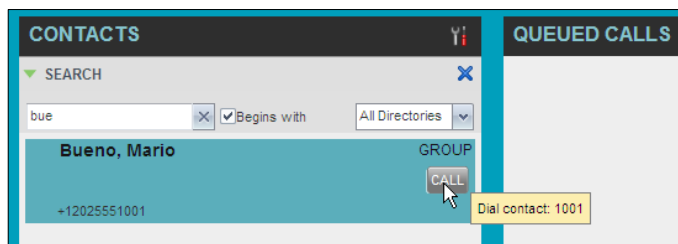


Dial from Search

You use the *Search* panel in the *Contacts* pane to search for contacts in your contacts' directories.

To dial a number from search:



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

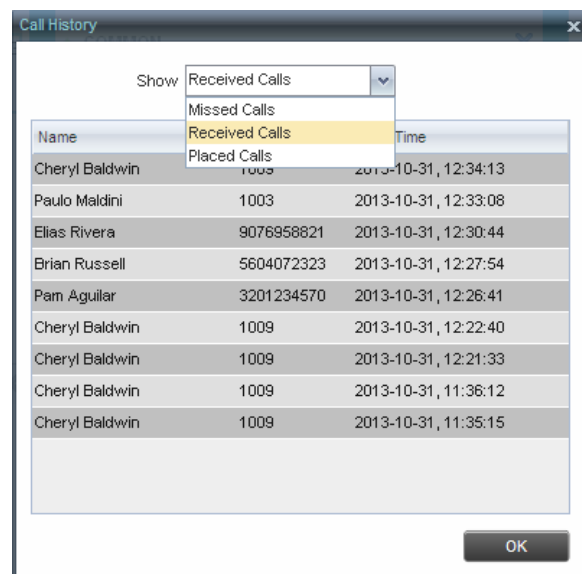


Dial from History

You can dial any number that is available in Call History.

To dial from Call History:

1. In the Call Console, click Call History . The Call History dialog box appears.
2. Call History Dialog Box
3. From the Show drop-down list, select Missed Calls, Received Calls, or Placed Calls.
4. Click the call log from which you want to dial and then click the Call  button.



Place Calls on Hold, Resume, and Camp Calls

You can only put an active call on hold.

Place Call on Hold

To place a call on hold:

Click **Hold**  for the target call.

Resume Held Call

To resume a held call:

Click **Answer**  for the target call.


Transfer Calls

There are a number of ways that you can transfer a call. You can transfer using blind transfer, transfer with consultation, or transfer to a queue.


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 Dialler, 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.

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

Transfer to Queue

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  for that queue.
4. The call is transferred to the selected queue and removed from the *Call Console*.
5. Alternatively, drag the call onto the target queue and click **Transfer**  for that queue.

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.


(Select Supervisors and agents in the Call Centre Feature in Business Portal).

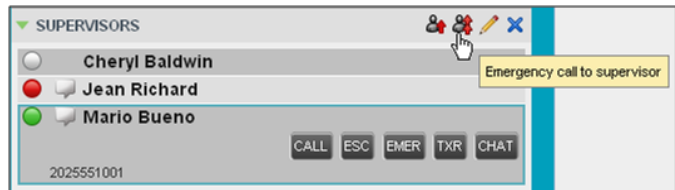
Make Emergency Call

Use this method to escalate a call to a supervisor in an emergency. 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 Centre select the supervisor or you can select the supervisor yourself.

NOTE: To make emergency calls, you must have Three-Way Call in your license pack.

To make an emergency call to an available supervisor:

1. While on the call, click  in the Supervisors panel.





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



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

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.
3. 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 is started, without putting the caller on hold.

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

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. Place original call on hold.
2. 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 , the call to the supervisor is initiated.
3. Without waiting for the supervisor to answer, click Transfer  in the supervisor panel.

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. Put the original call on hold
2. 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  for that supervisor.
3. Wait until the supervisor accepts your call and speak to the supervisor.
4. When ready to transfer the call, in the Call Console, select the original call.
5. Move the mouse over the call to the supervisor, and click Transfer .

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. Put the original call on hold
2. 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  for that supervisor.
3. When the supervisor accepts your call, speak to the supervisor about the issue.
4. In the Call Console, select the original call.
5. Click **Conference** . A conference call is established and the calls appear in the *Conference Call* panel.
6. To hand the call over to the supervisor, click **Leave Conference**  in the *Conference Call* panel.

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:

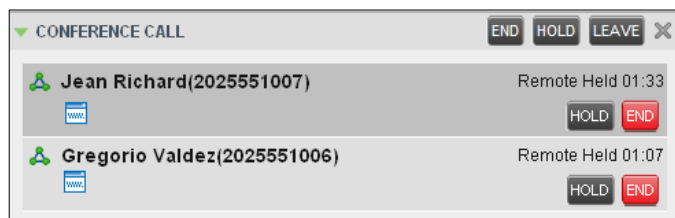
1. Put the original call on hold
2. In the Supervisors panel, click Escalate  to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click Escalate  for that supervisor.
3. When the supervisor accepts your call, speak to the supervisor about the issue.
4. In the *Call Console*, select the original call.
5. Click **Conference** .
6. A conference call is established and the calls appear in the *Conference Call* panel.
7. In the *Conference Call* panel, click **Hold Conference** . This puts both calls on hold but allows the customer and the supervisor to continue their conversation.
8. To drop a specific party from the conference, select their call from the *Conference Call* panel and click **End** .
9. To leave the call, click **Leave Conference**  in the *Conference Call* panel.

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.

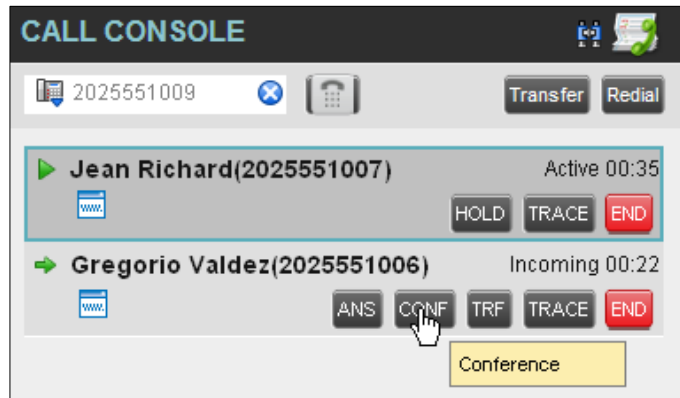
NOTE: To start conference calls, you must have the Three-Way Call or N-Way Call service assigned.

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 0 *Make Outbound Calls*.

To start a conference:


1. In the Call Console, select a 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.

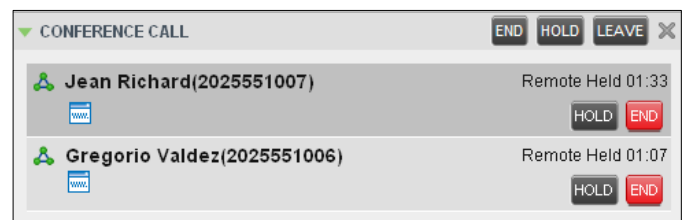


Add Participant to Conference

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** . The call is added to the conference



Hold Conference

To put an active conference on hold:

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

Resume Conference

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

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

Hold Participant

To put a specific conference participant on hold:

Expand the Conference Call panel.

Move the mouse over the target call and click Hold .

Take Participant Off Hold

To resume a participant's held call:

Expand the Conference Call panel.

Move the mouse over the target call and click Answer .

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.

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 .

End Conference

To end the conference:

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

Manage Call History


Call Centre collects call logs for your placed, received, and missed calls. You can call any number available in Call History.

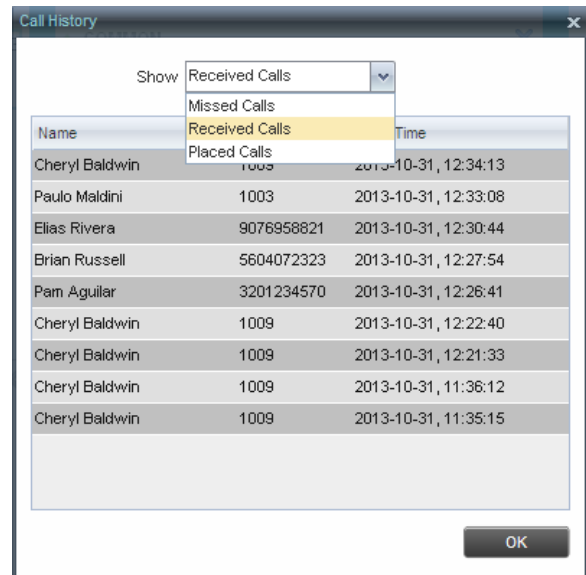
View Call History

You can view your placed, received, and missed calls.

NOTE: The format in which date and time are displayed in the *Call History* dialog box depends on the date and time settings selected on the *Settings – General* configuration page.

To view your call history:

In the Call Console, click Call History . The Call History dialog box appears displaying your past calls. The calls are grouped into placed, received, and missed calls. By default, missed calls are displayed. To show calls in a specific group, select that group from the *Show* drop-down list.




E-mail Contacts

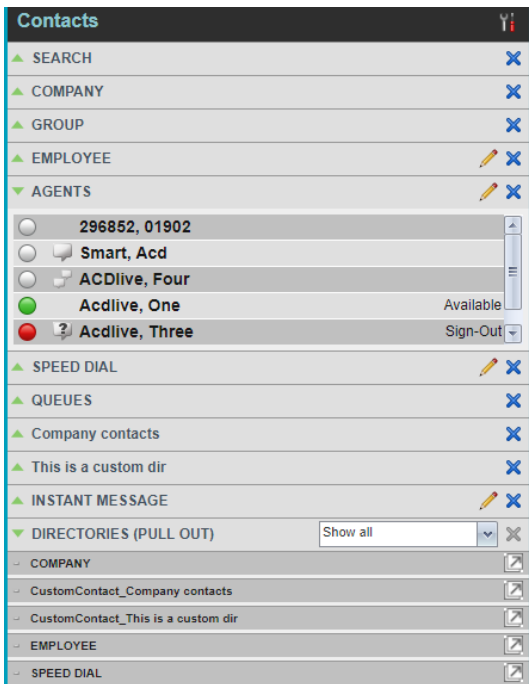
Call Centre allows you to send an e-mail message to a contact that has e-mail configured on the system. You must also have messaging enabled within Call Centre settings. The **EMAIL** button appears when you select a contact that has an e-mail address configured.

Send E-mail Message to Contact

To send an e-mail message to a contact:

1. In the Group/Enterprise directory, move the mouse over a contact who has e-mail.
2. Click **EMAIL** . This brings up a new e-mail window for the configured Messaging service.
3. Write your message and click Send.

Manage Contacts



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

Call Centre provides access to the contacts' directories listed in the following table:

| Interface Element | Description |
|---------------------------|--|
| Company | This directory contains the contacts in your Business Portal Company directory. |
| Group | This directory contains the contacts in your Business Portal Group directory. |
| Employee | This directory contains the contacts in your Business Portal Employee directory. |
| Supervisors (Agents) | The <i>Supervisors</i> directory, available only to agents, contains the list of your supervisors and allows you to view their phone state. |
| Agents (Supervisors) | The <i>Agents</i> directory, available only to supervisors, contains the list of agents you supervise and allows you to manage them and view their phone and ACD state. |
| Speed Dial | The <i>Speed Dial</i> directory contains the numbers configured for you or by you for your Speed Dial services (Speed Dial 8 and/or Speed Dial 100). |
| Queues | The <i>Queues</i> directory lists the call centres and associated DNIS numbers for the call centres you are either supervising or staffing. It allows you to transfer calls to queues quickly. |
| Custom | A <i>Custom</i> directory contains selected contacts from your BroadWorks group or enterprise directory. You can have access to zero, one, or several custom directories. Custom directories are configured by your administrator. |
| Outlook | The <i>Outlook</i> directory contains your Outlook contacts. |
| Instant Message | The <i>Instant Message</i> directory lists IM&P contacts to which you are subscribed. |
| LDAP (Search Access Only) | Call Centre provides search access to a configured <i>LDAP</i> directory. When you make a search on the <i>LDAP</i> directory and your search returns results, these results are displayed in the <i>Search</i> panel (in the <i>Contacts</i> pane). By default, no LDAP contacts are displayed in the <i>Contacts</i> pane. |

The *Contacts* pane also contains the *Directories* panel, which consolidates the contacts from the following directories: *Company*, *Custom*, *Employee*, *Outlook*, and *Speed Dial*.

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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.

View Contacts


Call Centre allows you to select directories to display in the *Contacts* pane and below the *Call Console*, show or hide directory contents, and select the order Avg Busy Out – This is the average time spent by the agent on an outgoing ACD call.

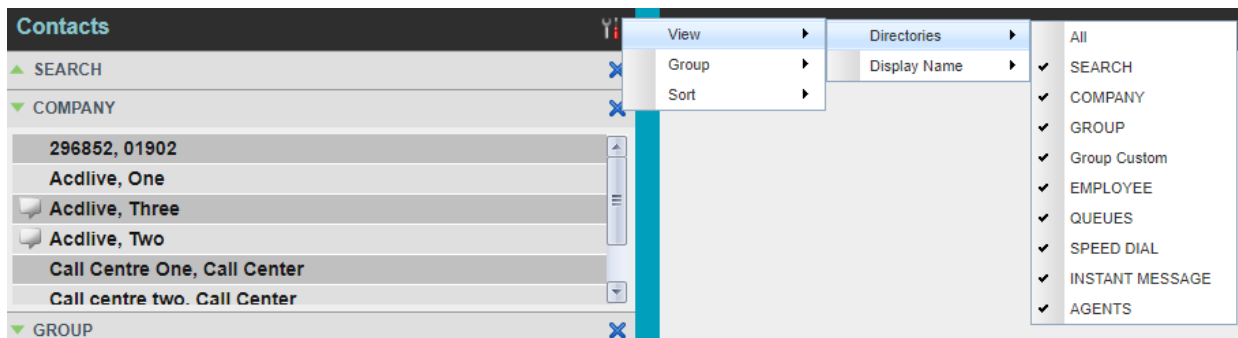
Show or Hide Directories


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 show 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.

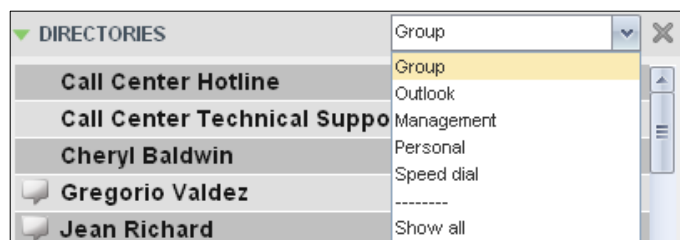


To hide a directory, you can also click the **Close** button  for that directory.

NOTE: You cannot close the *Directories* panel.

To show a directory in the *Directories* panel:

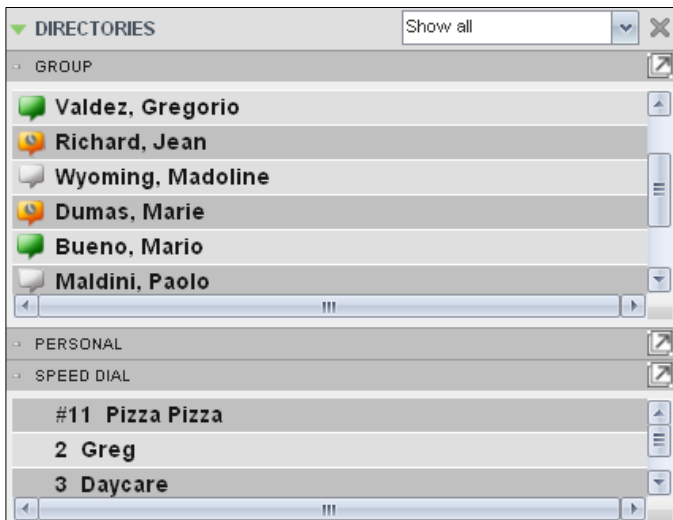
In the *Directories* panel, select the directory to display from the drop-down list. To display all directories, select *Show all*.



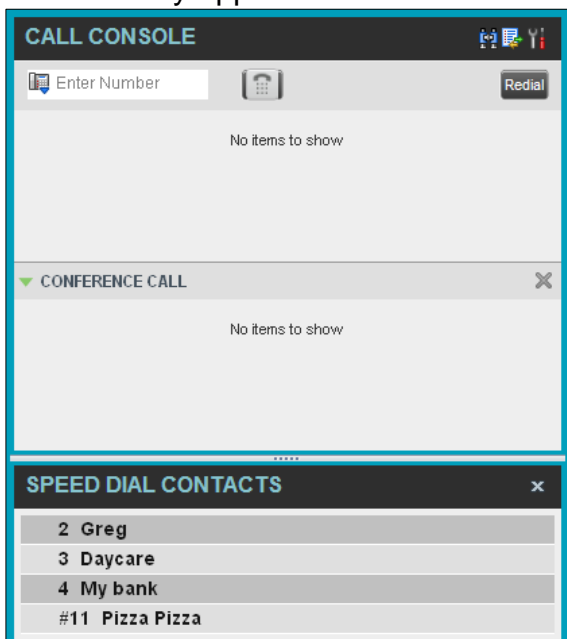
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Display Directory Below Call Console

In the Directories panel, select Show all.



Click the **Pull-out Directory** button  for the directory to display. The directory appears below the *Call Console*.



To close the directory, click the **Close** button .

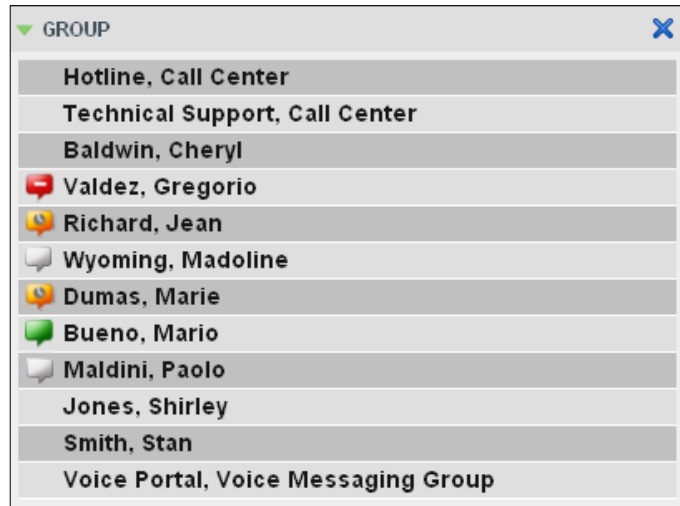
Show or Hide Directory Content

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.



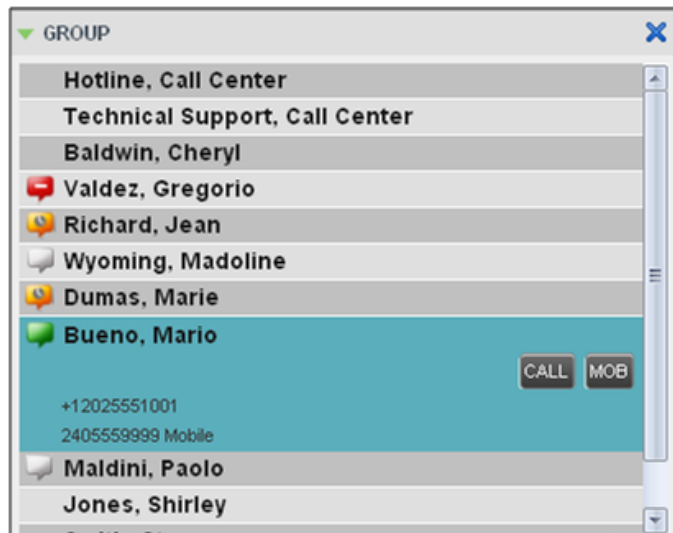
Show Contact Details

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 or IDs 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.

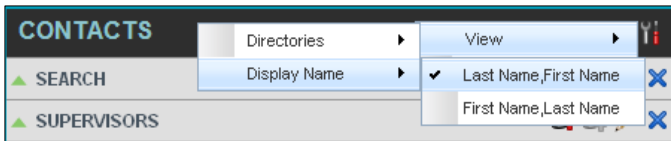


Select Display Order

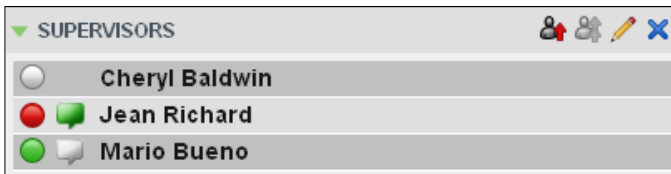
Contacts in the *Group/Enterprise*, *Agents*, and *Supervisors* directories can be displayed by either their first name or last name first. Your selection applies to all of these directories. You cannot specify the display order for each directory individually.

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.



Shows supervisors displayed by their last name followed by their first name.




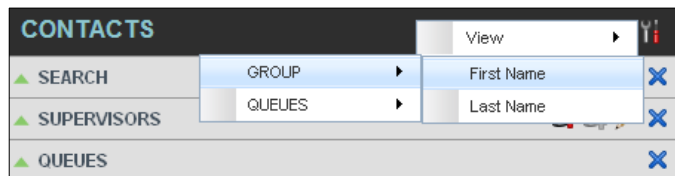
Organise Contacts

Sort Contacts

You can sort contacts in the following directories: *Group/Enterprise*, *Queues*, 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.



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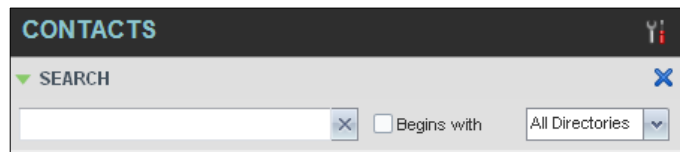
Shows a Group directory sorted by the contact's first name:.



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

Search for Contacts

Call Centre 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.

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.
2. 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.
3. To restrict the search to contacts that start with the entered text, check the Begins with box.
4. From the drop-down list, select the directories to search.
5. 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.

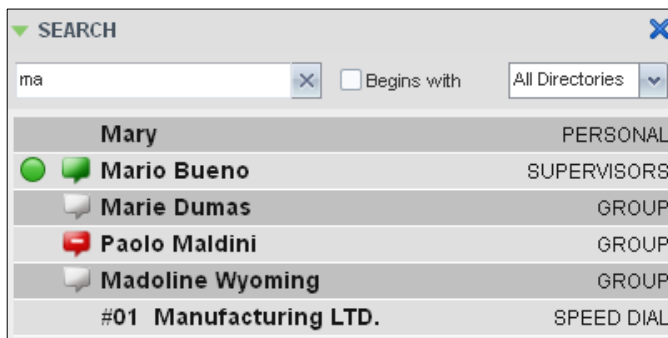
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Search results are displayed in the *Search* panel, each contact listed with the name of the directory where they were found.

BroadWorks directories are searched in the following order: Supervisors, Agents, Group/Enterprise. Duplicate search results in BroadWorks directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed.

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”.

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.

Manage Personal Contacts

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


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

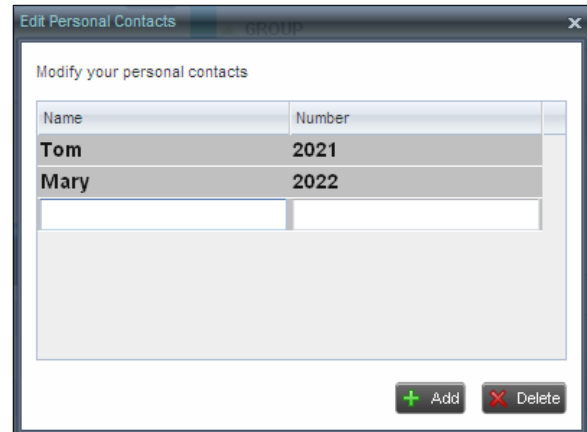
- Add Employee Contact
- Delete Personal Contact

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

Add Employee Contact


To add an employee contact:

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

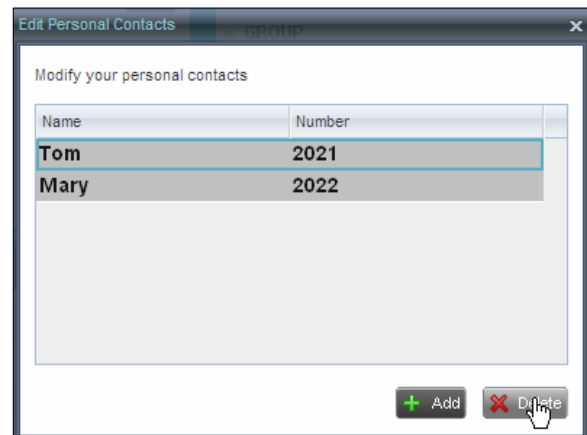


Delete Personal Contact

To delete a speed dial entry:

In the Personal panel, click Edit . The Edit Personal Contact dialog box appears.

Select the entry to delete and click Delete.



Manage Speed Dial Numbers


You can add or remove speed dial numbers via the web portal or in Call Centre, and the updates appear in both places. However, the updates that you make via the web portal appear only in Call Centre at the next sign-in.

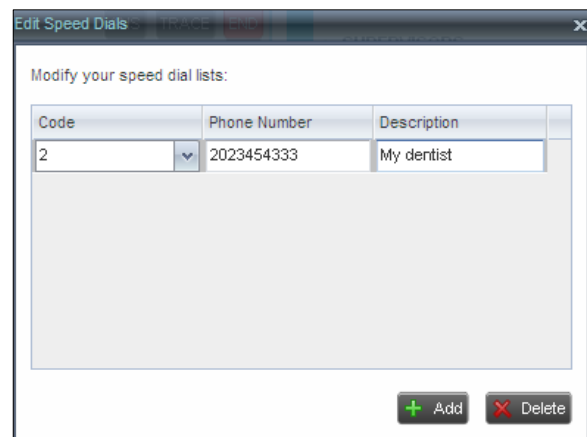
To update speed dial entries using the client, perform the following operations:

- Add Speed Dial Entry
- Modify Speed Dial Entry
- Delete Speed Dial Entry

Add Speed Dial Entry

To add a speed dial entry:

1. In the Speed Dial panel, click Edit . The Edit Speed Dials dialog box appears.
2. Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.
3. From the *Code* drop-down list, select a speed dial code.
4. In the *Phone Number* text box, enter the phone number to assign to the code.
5. In the *Description* text box, enter a description that allows you to identify the entry.
6. To save the changes, click anywhere in the dialog box outside the entry.




The screenshot shows the 'Edit Speed Dials' dialog box with the following table:

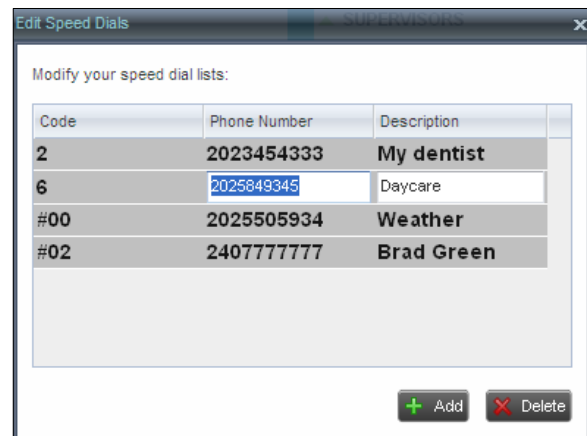
| Code | Phone Number | Description |
|------|--------------|-------------|
| 2 | 2023454333 | My dentist |

At the bottom right, there are '+ Add' and 'X Delete' buttons.

Modify Speed Dial Entry

To modify a speed dial entry:

1. In the Speed Dial panel, click Edit . The Edit Speed Dials dialog box appears.
2. Double-click the entry to modify. The entry becomes modifiable.
3. Modify information as required.
4. To save the changes, click anywhere in the dialog box outside the entry.




The screenshot shows the 'Edit Speed Dials' dialog box with the following table:

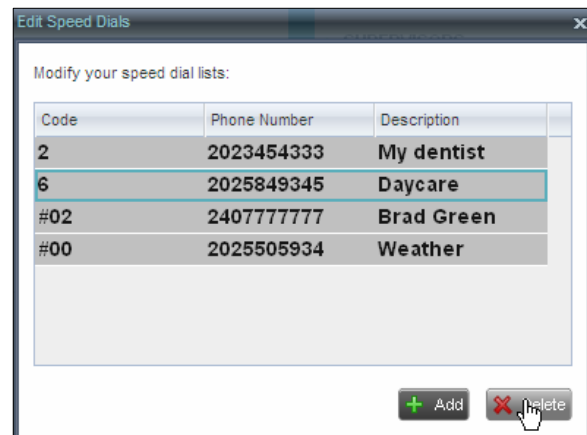
| Code | Phone Number | Description |
|------|--------------|-------------|
| 2 | 2023454333 | My dentist |
| 6 | 2025849345 | Daycare |
| #00 | 2025505934 | Weather |
| #02 | 2407777777 | Brad Green |

At the bottom right, there are '+ Add' and 'X Delete' buttons.

Delete Speed Dial Entry

To delete a speed dial entry:

1. In the Speed Dial panel, click Edit . The Edit Speed Dials dialog box appears.
2. Select the entry to delete and click Delete.



Monitor IM&P Contacts and Chat with Contacts

When you have an IM&P service assigned on BroadWorks, you can chat with other IM&P users and see the unified presence state of selected IM&P users directly from Call Centre. The unified presence of a contact is their presence state when they are logged in through multiple devices or applications, such Office UC Business for desktop or mobile.

IM&P capabilities are available only when you are online.

Monitor IM&P Contacts

To view the presence state of an IM&P contact, you have to first subscribe to the contact. Otherwise, Call Centre displays the contact's state as *Unsubscribed*. When you send a subscription request to a contact and you are waiting for their reply, Call Centre displays the contact's state as *Pending Subscription*.

The following directories display the IM&P state of contacts: *Instant Message*, *Agent*, *Supervisor*, *Enterprise/Group*, *Custom*, *Search*, and *Directories*.

NOTE: The Instant Message panel does not include IM&P contacts in the *Unsubscribed* state. You can subscribe to a contact either by sending a subscription request to the contact or by adding the contact to the *Instant Message* directory.

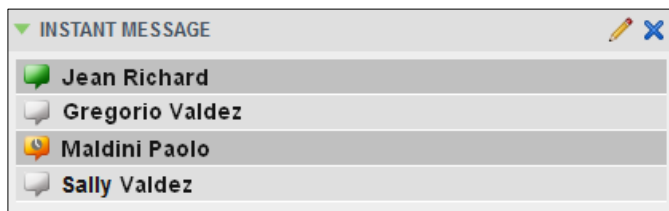
View Unified Presence State of Contacts

You can view the unified presence state of IM&P contacts in the *Instant Message*, *Agent*, *Supervisor*, *Enterprise/Group*, *Custom*, *Directories*, and *Search* panels. The presence icon is displayed to the left of the contact's name.

Unified instant messaging presence states indicate your contacts' availability to communicate using client applications such as Hosted Thin Call Centre, Hosted Thin Receptionist, UC-One Communicator Desktop, or UC-One Communicator Mobile.

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The actual unified presence state of a contact is displayed only if you are subscribed to the contact. Otherwise, the contact's state is displayed as *Unsubscribed* or *Pending Subscription*.



The following table lists the possible unified presence states in Call Centre:

| IM&P State | Icon | Description |
|-----------------------------|------|---|
| Subscribed States | | |
| <i>Available</i> | | The contact is online, available on one or more devices, and not busy on any device. |
| <i>Busy</i> | | The contact is online, but currently busy on one or more devices. Do not disturb. |
| <i>Away</i> | | The contact is connected but away from one or more devices and not busy on any device. |
| <i>Offline</i> | | The contact is offline on all devices. |
| Unsubscribed States | | |
| <i>Pending Subscription</i> | | You sent a subscribe request to the contact, but it has not yet been accepted. Clicking the icon resends the request. |
| <i>Not subscribed</i> | | The contact has the IM&P service but you are not subscribed to monitor their state. The contact does not appear in the <i>Instant Message</i> pane. Clicking this icon sends a subscription request to the contact. |

Chat with IM&P Contacts

You can

- have several concurrent one-on-one or multiuser instant messaging sessions open.
- can chat with more than one contact at the same time, either in one-on-one sessions or by participating in multiuser chats.

Each session requires a separate window.

Chat windows:

- appear at the bottom-right hand side of the Call Centre main interface. Subsequent windows open to the left of the latest opened *Chat* window.
- can be taken out of the main interface and placed elsewhere on the screen.

The number of concurrently open *Chat* windows depends on the browser window size and screen resolution. The oldest *Chat* window is closed when there is no more room for a new *Chat* window to open. This only applies to *Chat* windows that are placed within the main interface.

You can start a chat session with a contact or accept a session request from another user. A one-on-one session can be converted into a multiuser chat by inviting more participants. You can also receive an invitation to a multiuser chat from another user

When your IM&P contact is in your group/enterprise, you can also phone them directly from the *Chat* window.

The tasks related to instant messaging are described in the following sections:


- Start Instant Messaging Session
- Place Call from Chat Window
- Establish Multiuser Chat Session
- Manage Instant Messaging Session

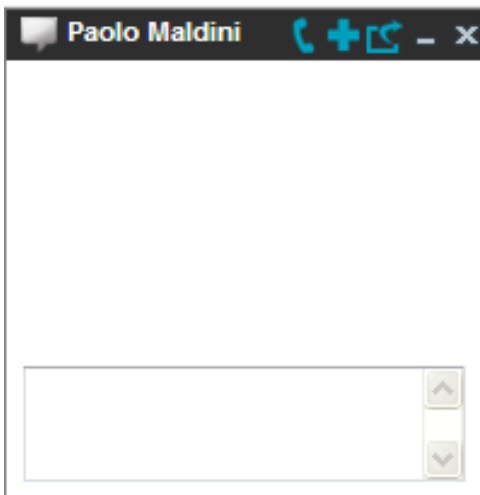
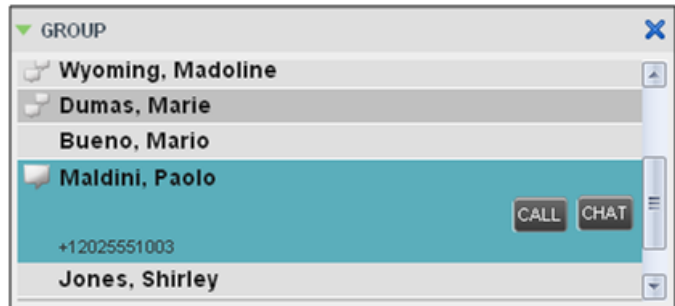
Start Instant Messaging Session

You can start an instant messaging session with an IM&P contact from any of the following panels: *Instant Message, Agent, Supervisor, Enterprise/Group, Custom, Search, and Directories*.

To start an instant messaging session with a contact:

In the Contacts pane, click the target contact. The entry expands displaying available action buttons.

Click Chat  on the line for the contact. A Chat window appears, displaying your contact's information on the title bar.




NOTE: A *Chat* window also appears when another IM&P user initiates a chat session with you. Type your message in the text box at the bottom of the window and click ENTER. Your message is sent to your contact.

The messages you send and receive appear in the *Chat Logs* area at the top of the window, below the title bar. Up to 50 messages per contact are kept in the log for the duration of your IM&P session, even if you close the *Chat* window and later start exchanging messages again with the same contact. The messages are cleared when you go offline.

Place Call from Chat Window

If the user with whom you are chatting is also a contact in your *Group/Enterprise* directory, you can call them directly from the *Chat* window.

To place a call from the *Chat* window:

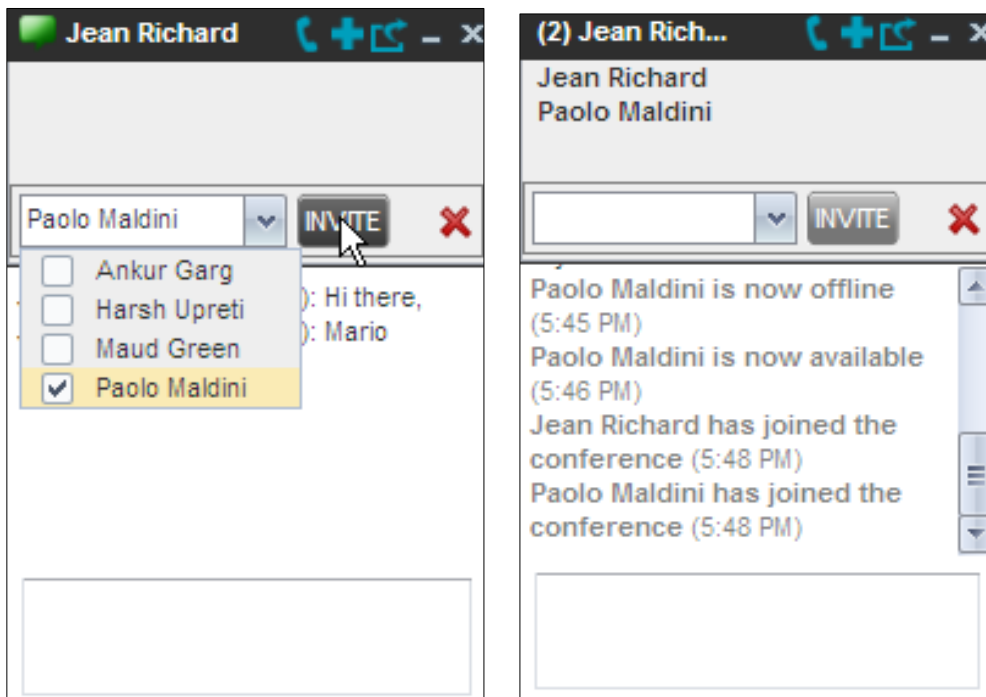
- Click the **Call** button  at the top-right of the *Chat* window.
- The Call Centre client issues a Click-To-Dial attempt to the contact's phone number and the call appears in the *Call Console*.

Establish Multiuser Chat Session

You can invite other contacts to your chat, thus converting your one-on-one chat to a multiuser chat. An incoming multiuser chat invitation opens a window for a new multiuser chat.

To add users to a chat session:

1. Click the Add User to Chat button **+** in the Chat window. A drop-down list of available contacts appears.
2. Select the check box next to each contact to invite and click the **Invite** button. When a contact joins the chat, a notification appears in the *Chat Logs* area of the *Chat* window. The participants (other than you) are also listed at the top of the window.
3. To leave the multiuser chat, close the *Chat* window.



Manage Instant Messaging Sessions

If a *Chat* window is not in focus and an incoming message is available for you to read, the colour of the window is light brown as shown in the following figure. This changes to black as soon as the window is in focus.

You can also close, minimize, or pop out a *Chat* window, that is, take the *Chat* window out of the Call Centre main interface and place it elsewhere on the desktop.

To pop out a *Chat* window:

Click the **Pop-out** button  at the top-right of the window.

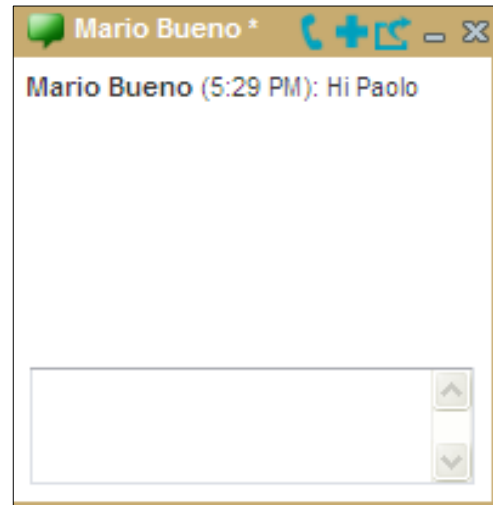
The window is placed on the desktop outside of Call Centre and the Pop-out button becomes the Pop-in button.

To place the window back within the Call Centre main interface:

Click the **Pop-in** button  at the top-right of the window.

To minimize or close a *Chat* window:

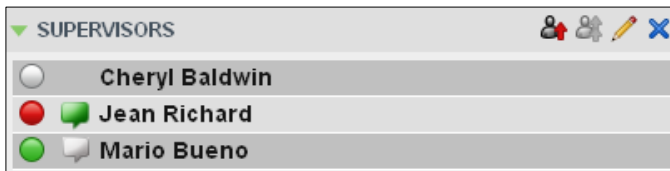
Click the **Minimize** or **Close** button at the top-right of the window. When a window is closed, the windows to the left (if present) shift to the right. This applies only to *Chat* windows that are placed within the Call Centre main interface.



Monitor Supervisors (Agent)

Call Centre 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".




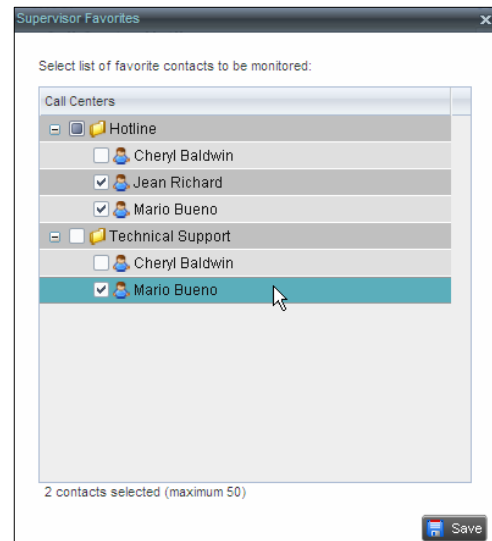
NOTE: This capability is designed to monitor the supervisor's state related to normal calls. Conference calls are handled differently, and it may happen that the state of a supervisor who was in a conference call is temporarily not reflected properly. For example, if the supervisor is in a conference and then all other parties hang up, the supervisor's status shows as *Idle* even though their phone may still be off hook.

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 Favourites dialog box appears.
2. Check the box next to each supervisor to monitor and click **Save**.



Supervisor Phone States

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

| Phone State | Icon | Description |
|-----------------------|---|--|
| <i>Idle</i> |  | Supervisor's phone is on-hook, which means the supervisor is not on a call. |
| <i>Busy</i> |  | Supervisor's phone is off-hook, which means that the supervisor is on a call. |
| <i>Ringing</i> |  | Supervisor's phone is in alerting state; a call is currently being delivered to the supervisor. |
| <i>Do Not Disturb</i> |  | Supervisor has enabled the Do Not Disturb service. |
| <i>Private</i> |  | 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. |
| <i>Unknown</i> |  | Supervisor is currently not monitored. |

Monitor Call Centres (Agent)

Call Centre provides you with real-time information about monitored queues. This information is displayed in the *Dashboard* pane.

Dashboard Pane

The *Dashboard* pane lists the monitored call centres and provides key indicators for each.

| Dashboard | | | |
|-------------------------|-------|-----------------------|-------|
| Call Centre One | | | |
| Current Calls in Queue | 0/5 | Longest Waiting Call | 00:00 |
| Expected Wait Time | 00:13 | Average Handling Time | 00:40 |
| Average Speed of Answer | 00:22 | Staffed | 3/3 |
| Call centre two | | | |
| Current Calls in Queue | 0/5 | Longest Waiting Call | 00:00 |
| Expected Wait Time | 00:00 | Average Handling Time | 00:00 |
| Average Speed of Answer | 00:00 | Staffed | 3/3 |


The following information is provided for each monitored call centre:

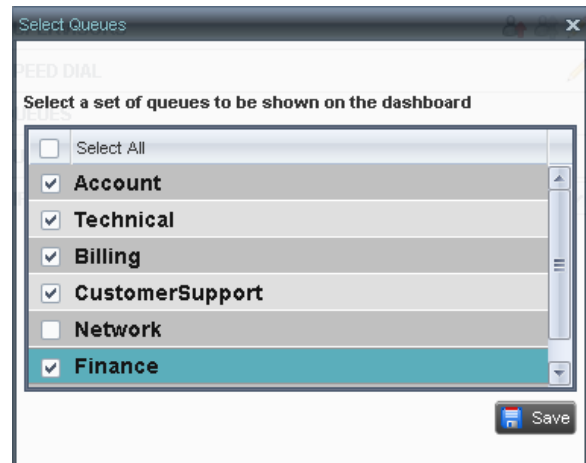
- *Call centre name* – The name of the call centre.
- *Status* – This remains blank
- *Current Calls in Queue* – This is the number of queued calls expressed as a ratio of the total queue capacity for that call centre. For example, “6/10” means that there are six calls in the queue, which can queue a maximum of ten calls.
- *Longest Waiting Call* – This is the waiting time of the call that has been in the queue the longest.
- *EWT (Expected Waiting Time)* – This is the estimated time a caller has to wait in this queue before their call is answered.
- *AHT (Average Handle Time)* – This is the average time it takes to process a call in this queue.
- *ASA (Average Speed of Answer)* – This is the average time a caller spends in the queue before the call is offered to an agent.
- *Staffed* – This is the number of agents that are in *Sign-In*, *Available*, *Unavailable*, or *Wrap-Up* ACD state, as a ratio of all agents assigned to this call centre
- The fields that provide visual indicators are *Current Calls in Queue*, *Longest Waiting Call*, *EWT*, *AHT*, and *ASA*.

Select Call Centres to Monitor

You can select up to 50 call centres to monitor in the *Dashboard* pane. You can only monitor call centres to which you have been assigned.

To select call centres to monitor:


1. In the Dashboard pane, click Options  and select the Select Queues option. The Select Queues dialog box appears.
2. Check the call centres you want to monitor and click **Save**.

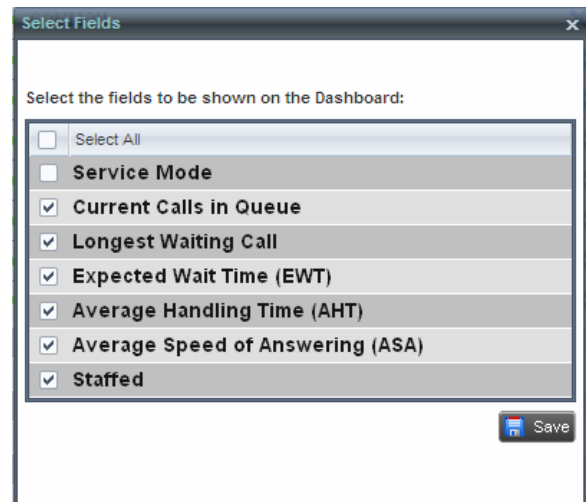


Select Information to Display

You can select which performance indicators you want to display in the *Dashboard* pane.

To select information to display:


1. In the Dashboard pane, click Options  and select the Edit Visible Fields option. The Edit Visible Fields dialog box appears.
2. To display all performance indicators, check *Select All*. Alternatively, to show or hide some fields, check to uncheck the corresponding check boxes.
3. Click **Save**.

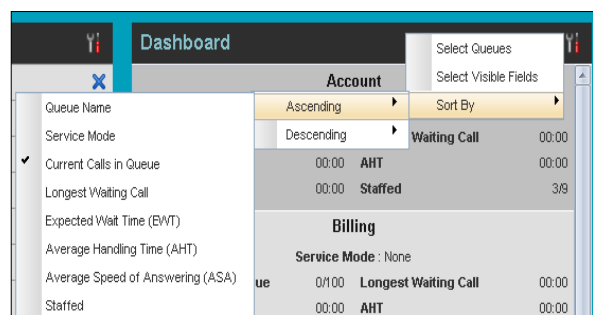


Order Call Centres

By default, call centres displayed in the *Dashboard* pane are ordered by name. You can change the order in which call centres are displayed.

To change the order of call centres:

1. In the Dashboard pane, click Options  and select the Sort By option.
2. Select *Sort By* and then select the ordering options you want.



Manage Agents (Supervisor)

You use the *Agents* panel to view the agents who you are supervising and to perform actions on them. You can also monitor the call and the ACD state of selected agents and make agents join or leave queues.




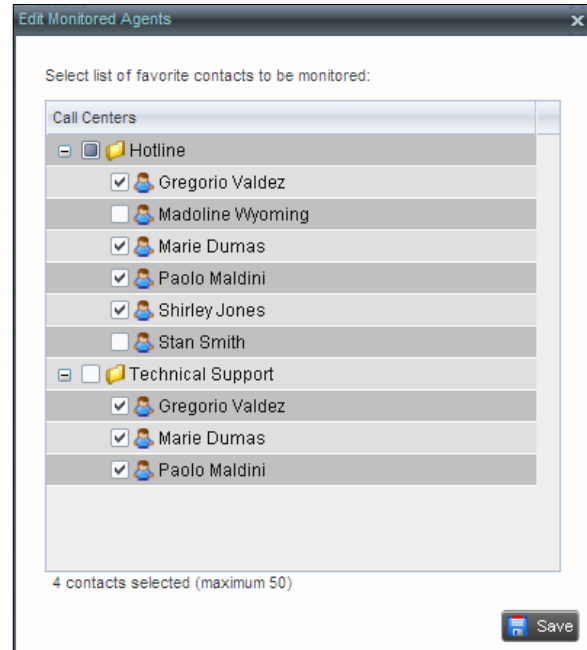
| AGENTS | |
|--------|------------------------------|
| | Valdez, Gregorio Unavailable |
| | Wyoming, Madoline Sign-Out |
| | Dumas, Marie Wrap-Up |
| | Maldini, Paolo Sign-Out |
| | Jones, Shirley Wrap-Up |
| | Smith, Stan Available |

Select Agents to Monitor

Call Centre allows you to monitor the call and the ACD state of selected agents, but agents are not automatically monitored. To monitor the state of an agent, you must select the agent.

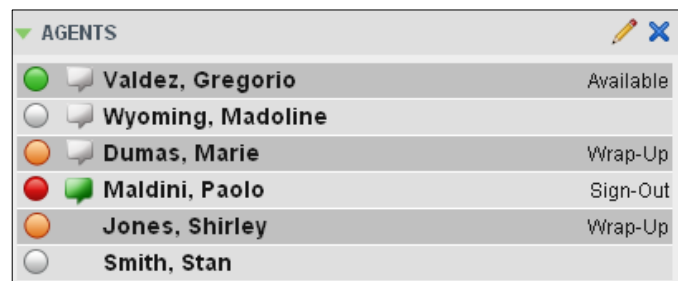
To select agents to monitor:

1. In the Agents panel, click Edit . The Edit Monitored Agents dialog box appears.
2. Select the check box next to each agent to monitor. If an agent is staffing multiple call centres, by selecting that agent for monitoring in one call centre, you are also selecting them for monitoring under all call centres that they are staffing.
3. Click Save.



The selected agents have their call and ACD state displayed. The state of agents who are not monitored appears as unknown (dimmed).

The list is saved and is available during subsequent sessions.



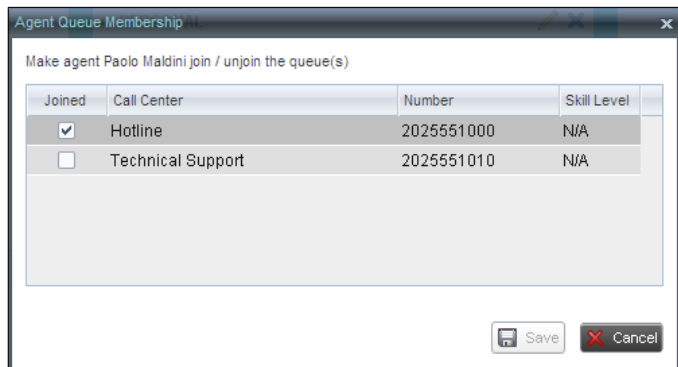
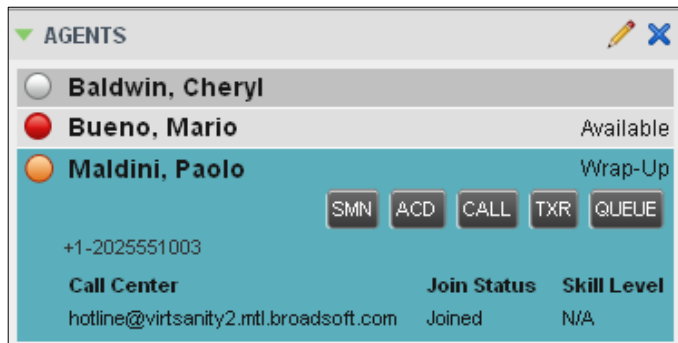
| AGENTS | |
|--------|----------------------------|
| | Valdez, Gregorio Available |
| | Wyoming, Madoline |
| | Dumas, Marie Wrap-Up |
| | Maldini, Paolo Sign-Out |
| | Jones, Shirley Wrap-Up |
| | Smith, Stan |

Make Agents Join Queues

Call Centre allows you to force an agent's join status in queues, effectively making the agent join or leave queues.

To make an agent join or leave one or more queues:

1. In the Agents panel, click the target agent. The entry expands displaying available action buttons.
2. Click the Queue button. The Agent Queue Membership dialog box appears listing the call centres to which the agent is assigned.
 - To make the agent join a queue, check the Join box in the row of the queue you want the agent to join.
 - To make the agent leave a queue, uncheck the Join box in the row of the queue you want the agent to leave.
3. Click Save.



Agent Phone and ACD States









Monitored agents have their phone and ACD state displayed.

A single icon, to the left of the agent's name, represents the agent's combined phone and ACD state, which indicates the agent's ability to take calls.

In addition, the agent's ACD state is also displayed in text following their name.

| AGENTS | | |
|---|-------------------|-----------|
|  | Valdez, Gregorio | Available |
|  | Wyoming, Madoline | |
|  | Dumas, Marie | Wrap-Up |
|  | Maldini, Paolo | Sign-Out |
|  | Jones, Shirley | Wrap-Up |
|  | Smith, Stan | |

The possible agent's phone and ACD states are as follows:

| Phone State | ACD State | Icon | Description |
|-------------------------------|---------------------------------------|---|--|
| <i>Idle</i> | <i>Available</i> |  | Agent's phone is on-hook and the agent is available to take ACD calls. |
| <i>Ringing</i> | <i>Available</i> |  | Agent's phone is ringing and the agent is available to take the call. |
| <i>Any</i> | <i>Unavailable, Sign-In, Sign-Out</i> |  | Agent is not available to take ACD calls. |
| <i>Idle, Ringing</i> | <i>Wrap-Up</i> |  | Agent is performing post call work. They may or may not be available to take cal123ls. |
| <i>Busy</i> | <i>Available, Wrap-Up</i> |  | 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 centre's call waiting and wrap-up settings. |
| <i>Do Not Disturb</i> | <i>Any</i> |  | Agent has enabled the Do Not Disturb service. ACD calls are not delivered to agent in the <i>Do Not Disturb</i> call state. This state is not recommended for Call Centre agents. Agents should use the <i>Unavailable ACD</i> state when they need to block new incoming calls temporarily. |
| <i>Call Forwarding Always</i> | <i>Any</i> |  | Agent has enabled the Call Forwarding Always service. |
| <i>Unknown</i> | <i>Any</i> |  | Agent is currently not monitored. |

View Agent's Details

Clicking an agent expands the entry to show all queues the agent is assigned to and all the agent's current calls, in order of arrival.

For each call, the following information is displayed:

- Call number
- Calling name (if available) and calling number (and for direct calls, extension), for example, "Joe Smith +12403645125"
- Call length in the following format: "MM:SS" (or "HH:MM:SS" if the call lasts longer than an hour), for example, "10:22"




For each queue, the following information is displayed:

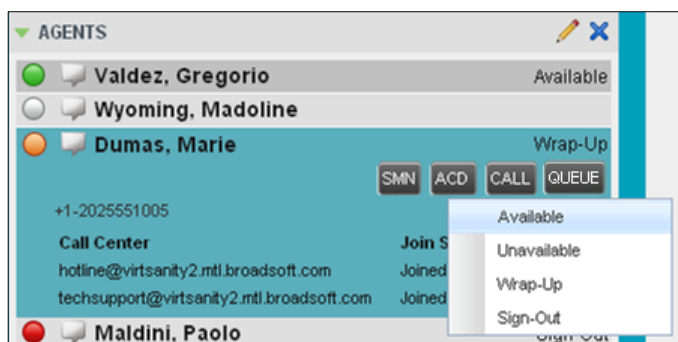
- Call Centre ID
- Whether the agent has joined the queue
- The agent's skill level in that queue, if applicable

Change Agent ACD State

You can force an ACD state change for an agent. This action can only be performed on monitored agents.

To change an agent's ACD state:

1. In the Agents panel, click the agent and then click the ACD State button .
2. From the drop-down list, select the new state.




Barge in on Agent's Call

Supervisor Barge-In allows you to barge in on an agent's call. This is useful when you want to enter an already established call between two other people. You can only barge in on agents who you selected for phone and ACD state monitoring.

NOTE: This functionality is only available if you have been assigned the Directed Call Pickup with Barge-in service.

To barge in on an agent's call:

1. In the Contacts pane, expand the Agents panel and select an agent. The agent must have exactly one active call.
2. Click the agent to expand the entry and click Barge In . A Three-Way Conference is established.


Pick Up Agent's Ringing Call

Call Pickup allows you to pick up an unanswered call on behalf of an agent. This is useful when the agent is away or busy.

NOTE

1. This functionality is only available if your group has been assigned the Call Pickup service.
2. A call that is retrieved using Call Pickup is treated in the Call Centre reports as a direct inbound call to the retrieving party and not as an ACD call, because it was not answered by the agent selected using the ACD process.
3. Supervisor Call Pickup is only supported if the agent and supervisor are in the same group. In an enterprise, this function can be disabled.

To pick up an unanswered call for an agent:

1. In the Agents panel, select an agent whose phone is ringing. Move the mouse over the agent and click Answer .
2. You are now answering the call, and the call appears in the *Call Console*.

Manage Queued Calls (Supervisor)

Call Centre allows you to manage queued calls in the selected call centres (up to five) and to monitor calls in real time. You use the *Queued Calls* pane to manage queued calls under your supervision.

Section

Queued Calls Pane describes the *Queued Calls* pane.

The rest of this section describes the operations you perform to manage queued calls:

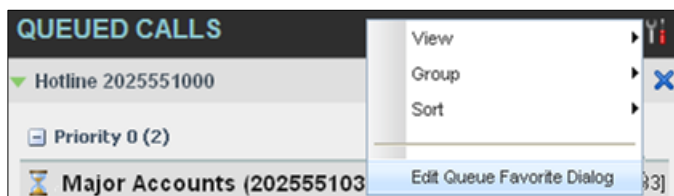
- Select Call Centres to Monitor
- Show or Hide Call Centre Panels
- View Queued Calls
- Group Queued Calls
- Order Queued Calls
- Modify Number of Calls to Display
- Retrieve Call from Queue
- Transfer Call to Another Queue
- Transfer Call from Queue to Agent
- Transfer Call to Ad Hoc Number
- Change Position of Call in Queue

Select Call Centres to Monitor

You can select up to five call centres to monitor. You view the monitored call centres in the *Queued Calls* pane.

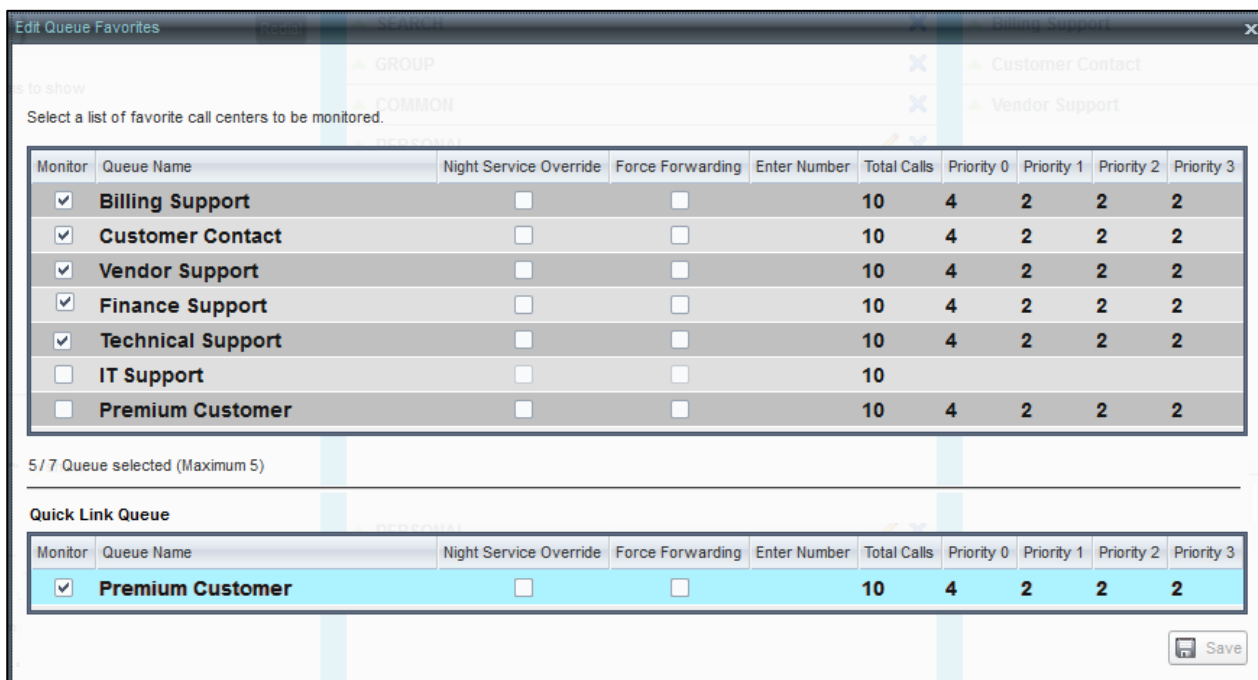
To select call centres to monitor:

1. In the Queued Calls pane, click Options  and select the Edit Queue Favourite Dialog option.




Cloud Voice: Call Centre User Guide

2. The *Edit Queue Favourites* dialog box appears.




3. Select the *Monitor* check boxes in the rows of the call centres to monitor. Note that the Quick Link Queue can only be selected for monitoring from the *Dashboard*.
4. If you select a queue that you are currently monitoring as the Quick Link Queue, the queue stops being monitored as the Quick Link Queue when you save your changes and it is monitored as a regular queue.
5. Click **Save**.

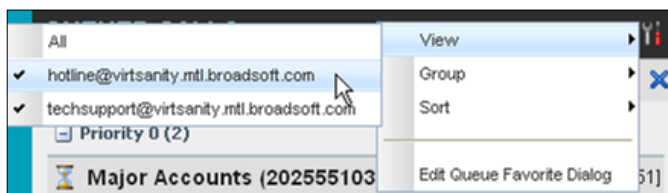
NOTE: Clicking the Close button  in a call centre panel in the *Queued Calls* pane, closes the panel but does not stop monitoring the call centre. To stop monitoring a call centre, deselect the *Monitor* check box for the call centre in the *Edit Queue Favourites* dialog box.


Show or Hide Call Centre Panels

You can show or hide call centre panels for monitored queues. This is not the same as selecting queues to be monitored.

To show/hide call centre panels:

1. In the Queued Calls pane, click Options .
2. Select View and then select or unselect the names of the call centres. To show or hide all call centres, select or deselect All.




Alternatively, to hide a call centre, click the **Close** button . The call centre is removed from the display but it continues to be monitored.

NOTE: This does not apply to the Quick Link Queue. When you click the Close button for the Quick Link Queue, the queue is no longer monitored.

View Queued Calls

You can selectively expand or collapse call centre panels to show or hide calls in the monitored call centres.

To view queued calls for a call centre:

Click the *Expand*  button for that call centre.

To view call details of a selected call:

Click that call.

Queued Calls Pane

You use the *Queued Calls* pane to manage queued calls.

The *Queued Calls* pane displays the monitored call centres and lists the calls queued in each call centre.

You can monitor up to five call centre queues at a time, plus one special queue, called the Quick Link Queue, which does not count toward the maximum of the five-queue limit. The monitoring of a Quick Link Queue is triggered from the *Dashboard*. Each call centre is displayed in a separate panel.



| QUEUED CALLS | |
|---|-----------------|
| ▲ Premium_CC 5143403030 | 0/10 (0/10) ✕ |
| ▼ TestCC 5143403023 | 2/10 (2/10) ✕ |
| Priority 0 (2) | |
| ⚠ cc3007 group3 (5143403007) | 01:17 [01:17] |
| Priority 0, Position 1 TestCC (5143403023) | RETRIEVE |
| ⌚ cc3001 group3 (5143403001) | 00:10 [00:10] |


The panel's header provides the following information and controls:

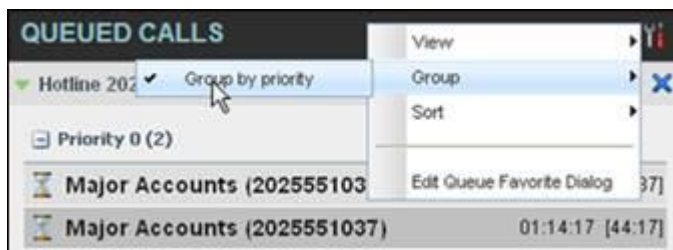
- Call centre name – The name of the call centre.
- Call centre number – The primary phone number of the call centre.
- Ratio of visible calls to display limit – This is the number of calls in the queue that are currently displayed against the maximum number of calls that can be displayed for a queue.
- Ratio of queued calls to queue length – This is the number of calls in queue against the queue length that is displayed.

Group Queued Calls

Currently the ability to group queued calls by their priority bucket is not supported.





To group or ungroup queued calls:

1. In the Queued Calls pane, click Options .
2. From the drop-down list, select Group, and then select or deselect Group by Priority. This action applies to all monitored call centres.



3. To ungroup calls, unselect the *Group by Priority* option.
4. When you expand the panel for a call centre, the list of calls queued in that call centre appears.

The following information is provided for each call:


- Call Status icon – A graphic representation of the state of the queued call:
- *Waiting*  – The call is queued, waiting to be answered.
- *Announcement*  – An entrance announcement or music is being played to the caller.
- *Reordered*  – The position of the call in the queue has been changed.
- *Bounced*  – The call has been bounced.
- Caller's identity – The name (if available) and the phone number of the calling party.
- Call time – The total call time, including the time in the current queue (in parentheses).

Clicking a call expands the call to show additional data:

- Position – The position of the call in the queue.
- Destination – The name (if available) and the phone number of the call centre (or DNIS, when applicable) that was called.
- When the call is expanded, the action buttons for actions that can be performed on the call appear.

Modify Number of Calls to Display


For each Standard call centre that you are monitoring, you can modify the maximum number of calls to be. The total number of calls to display for a call centre cannot exceed 50.

1. In the Queued Calls pane, click Options  and select the Edit Queue Favourite Dialog option. The Edit Queue Favourites dialog box appears.
2. For each Standard call centre you are monitoring, set the total number of calls to display.

Retrieve Call from Queue


You can retrieve queued calls from the queue to your phone device.

To retrieve a call from a queue:

1. Click the call in the *Queued Calls* pane and click Retrieve  for that call.
2. Once you retrieve a call, the call appears in the *Call Console* and you treat it as any other call. For example, you can transfer it to an ad hoc number or to another queue.


Transfer Call to Another Queue

To transfer a queued call to another queue:

1. In the Queued Calls pane, select the call to transfer.
2. In the Contacts pane, expand the Queues panel.
3. Click the target queue and click Transfer  for that queue.
4. The call is transferred and removed from the queue.

Transfer Call from Queue to Agent

To transfer a call from a queue to an agent:

1. In the Queued Calls pane, select the call to transfer.
2. In the Contacts pane, expand the Agents panel.
3. Click the target agent and click Transfer  for that agent.
4. The call is transferred and removed from the queue.

Transfer Call to Ad Hoc Number

To transfer a call to an ad hoc number:

1. In the Queued Calls pane, select the queued call.
2. In the Dialler, enter the destination

number and click Transfer .




3. The call is transferred and removed from the queue.

Change Position of Call in Queue

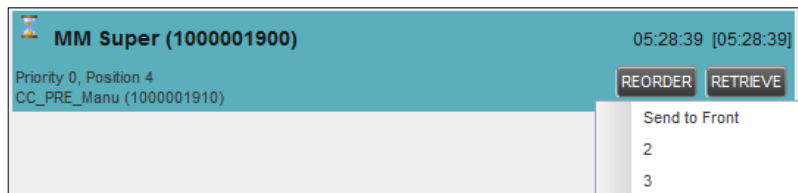
You can reorder a queued call in a Standard call centre.

To change a call's position in a queue:

1. In the Queued Calls pane, click the target call to expand it.

2. Click Reorder  and select the new position in the queue from the list that appears.

3. The call is placed in the new position.



NOTE 1: You cannot place a call ahead of a bounced call.

NOTE 2: The list can contain a maximum of 24 reorder positions, which you can choose from to reorder a call in queue, in addition to *Send to Back* and *Sent to Front* options.

View Real-Time Statistics (Supervisor)

Call Centre provides you with real-time information about supervised agents and queues. This information is displayed in the Dashboard. You can also navigate to a selected agent or a queue directly from the Dashboard.

Display Dashboard

To access the Dashboard:

Click the **Dashboard** link at the top right-hand side of the main interface window. The *Dashboard* is launched in a separate window and can be open at the same time as other Call Centre windows.

The screenshot shows the 'Call Center Dashboard' interface. It is divided into two main sections: 'Queues' at the top and 'Agents' at the bottom. The 'Queues' section displays a table with columns for Name, Status, Calls in Queue, Longest Waiting Call, Expected Wait Time, Average Handling Time, Average Speed of Answer, Staffed, Idle, and Unavailable. The 'Agents' section displays a table with columns for Name, Status, Queues (Total), Sign-in Time, Sign-in Duration, Call State (Time), Agent State (Time), % Available, Avg Busy In, Avg Busy Out, and Avg Wrap-Up.

| Call Center Dashboard | | | | | | | | | | | |
|-----------------------|--------|----------------|----------------------|--------------------|-----------------------|-----------------------|---------|------|-------------|-------------------------------------|--|
| Dashboard | | | | | | | | | | | |
| Queues | | | Current | | | Averages | | | Agents | | |
| Name | Status | Calls in Queue | Longest Waiting Call | Expected Wait Time | Average Handling Time | Average Speed of Answ | Staffed | Idle | Unavailable | Show Agents | |
| Call Centre One | | 1/5 | 00:25 | 00:01 | 00:04 | 00:05 | 3/3 | 1 | 0 | <input type="checkbox"/> | |
| Call centre two | | 0/5 | 00:00 | 00:00 | 00:00 | 00:00 | 3/3 | 1 | 0 | <input checked="" type="checkbox"/> | |

| Agents | | | | | | | | | | | |
|--------|--------------|---------------|--------------|------------------|-------------------|----------------------|-------------|-------------|--------------|-------------|--|
| Agents | | Memberships | | Current | | | | Averages | | | |
| Status | Name | Queues(Total) | Sign-in Time | Sign-in Duration | Call State (Time) | Agent State (Time) | % Available | Avg Busy In | Avg Busy Out | Avg Wrap-Up | |
| Active | Active_One | 2 | 09:30:39 | 03:48 | Idle | Wrap-Up (00:38) | 82% | 00:14 | 00:00 | 00:00 | |
| Active | Active_Three | 2 | 14:09:31 | 19:24:56 | Idle | Available (19:24:56) | 100% | 00:10 | 00:00 | 00:00 | |
| Active | Active_Two | 2 | 15:45:37 | 17:48:50 | Ringin | Available (52:31) | 99% | 00:07 | 00:00 | 00:00 | |

The *Dashboard* is divided into two parts with queue information in the top half and agent information in the bottom half. The information is updated at a configurable refresh rate. The default is 5 seconds.

By default, information about agents is hidden.

To view agents staffing a call centre:

Check the *Show Agents* check box in the row for that call centre.

Queue Information

The *Dashboard* displays each call centre queue on a separate line and provides the following information about each queue:

- *Name* – This is the name of the call centre.
- *Calls in Queue* – This is the number of queued calls expressed as a ratio of the total queue capacity for that call centre. For example, “6/10” means that there are six calls in the queue, which can queue a maximum of ten calls.
- *Long Waiting Call* – This is the waiting time of the call that has been in the queue the longest.
- *EWT (Expected Waiting Time)* – This is the expected waiting time of calls in the queue.
- *AHT (Average Handle Time)* – This is the average handling time for calls in the queue.
- *ASA (Average Speed of Answer)* – This is the average amount of time a caller spends in the queue before the call is offered to an agent.
- *Staffed (Agents)* – This is the number of agents managed by you that are in *Sign-In, Available, Unavailable, or Wrap-Up* ACD state, as a ratio of all agents managed by you for this call centre.
- *Idle (Agents)* – This is the number of agents who are in the *Available* ACD state but presently not on a call.
- *Unavailable* – This is the number of agents who are signed in to the call centre but not available to take calls.
- *Show Agents* – When this check box is selected, the agents who are joined in the call centre are displayed in the *Agents* area of the *Dashboard*.

The fields that provide visual indicators are *Calls in Queue, Longest Waiting Time, EWT, AHT, and ASA*.

Agent Information

The *Dashboard* displays information about the agents for the selected queues.

To display agent information:

1. To select the queues for which you want to view agents' information, check the *Show Agents* box on the lines for the queues in the *Queues* area of the *Dashboard*.
2. To hide signed-out agents, check the *Hide Signed Out Agents* box at the top-right corner of the *Dashboard*.



The following information is provided for each displayed agent:

- Status – This is the agent's combined phone and ACD state.
 - **Note** that the Status column is only sorted by the ACD state and it ignores the phone state.
- Name: This is the agent's name.
- Queues (total): This is the total number of queues to which the agent is assigned. This number is a link, which when clicked, opens a dialog box that lists the agent's queues.
- Sign-In Time: This is the agent's most recent sign-in time.
- Sign-In Duration: This is the amount of time that the agent has been signed in.
- Call State (Time): This is the call state and time on the current call. The call state can be Idle, Ringing, or On a call.
 - If an agent is in multiple calls, the call time reflects the time of the longest running call.
 - When a call is released, then the call time reflects the time on the remaining calls.
- Agent State (Time) – This is the agent ACD state and time. If an agent is unavailable, the unavailable code is shown.
- % Available – This is the time that the agent was available to take calls shown as a percentage of the duration of the current sign-in.
- Avg Busy In – This is the average time spent by the agent on an incoming ACD call.
- Avg Busy Out – This is the average time spent by the agent on an outgoing ACD call.
- Avg Wrap-Up – This is the average time spent by the agent in a post call wrap-up.
- Fields that provide visual indicators are Call State (Time), On Call, Idle, Agent State (Time), Unavailable, Avg Busy In, Avg Busy Out, and Avg Wrap-Up.

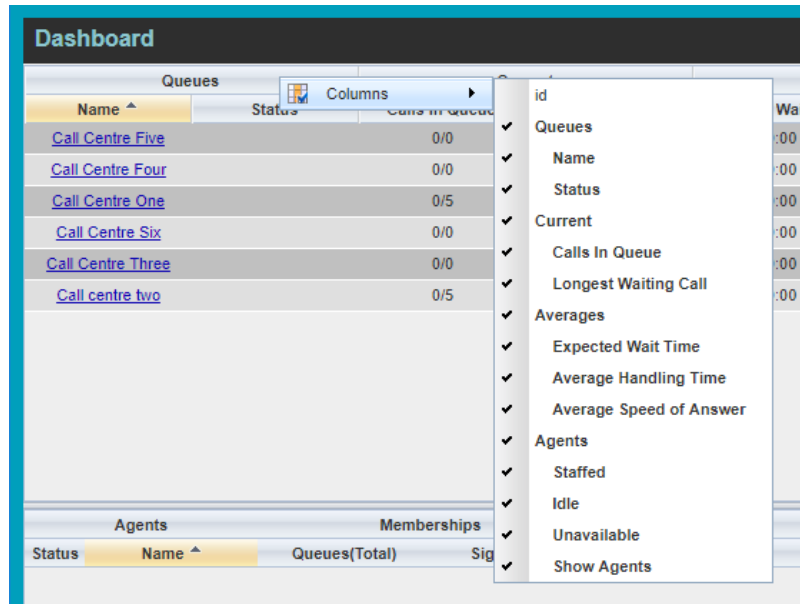
The *Dashboard* is designed to be used together with the *Queued Calls* pane and the *Agents* panel in the *Contacts* pane. The *Dashboard* provides you with a real-time view of agents and queues, while the *Agents* panel and *Queued Calls* pane allow you to take actions on monitored agents and ACD calls.

Select Information to Display

By default, Call Centre displays information about call centres and agents as described in sections *Queue* and *Agent*. You may however modify what information you want to appear in the *Dashboard*.

To select information to display:

1. Right-click the first row in the queued calls or agents table.
2. From the menu that appears, select *Columns*.
3. From the list of available columns, uncheck the columns you want to hide and check the columns you want visible.
4. When you are done, click anywhere in the *Dashboard* outside the menu.



If the selected queue is currently not monitored, the application starts monitoring the queue as a special queue, called Quick Link Queue, which does not count toward the maximum of five queues that can be monitored. You can perform normal call operations on calls in the Quick Link Queue.

When you close the Quick Link Queue, Call Centre stops monitoring the queue and the queue is removed from the *Queue* pane.

When you click a non-monitored queue while there is already a queue monitored as Quick Link Queue, the new queue replaces the old queue as the Quick Link Queue and Call Centre stops monitoring the old queue.

Cloud Voice: Call Centre User Guide

Call Center Dashboard

Hide Signed Out Agents:

| Queues | | Current | | | | Averages | | Agents | | | |
|-----------------|--------|----------------|----------------------|--------------------|-----------------------|-----------------------|---------|--------|-------------|-------------------------------------|--|
| Name | Status | Calls In Queue | Longest Waiting Call | Expected Wait Time | Average Handling Time | Average Speed of Answ | Staffed | Idle | Unavailable | Show Agents | |
| Call Centre One | | 1/5 | 00:25 | 00:01 | 00:04 | 00:05 | 3/3 | 1 | 0 | <input checked="" type="checkbox"/> | |
| Call Centre Two | | 0/5 | 00:00 | 00:00 | 00:00 | 00:00 | 3/3 | 1 | 0 | <input checked="" type="checkbox"/> | |

| Agents | | Memberships | | Current | | | Averages | | | |
|--------|--------------|---------------|--------------|------------------|-------------------|----------------------|-------------|-------------|--------------|-------------|
| Status | Name | Queues(Total) | Sign-in Time | Sign-in Duration | Call State (Time) | Agent State (Time) | % Available | Avg Busy In | Avg Busy Out | Avg Wrap-Up |
| Active | Active_One | 2 | 09:30:39 | 03:48 | Idle | Wrap-Up (00:36) | 82% | 00:14 | 00:00 | 00:00 |
| Active | Active_Three | 2 | 14:09:31 | 19:24:56 | Idle | Available (19:24:56) | 100% | 00:10 | 00:00 | 00:00 |
| Active | Active_Two | 2 | 15:45:37 | 17:48:50 | Ringing (00:06) | Available (52:31) | 99% | 00:07 | 00:00 | 00:00 |

To navigate from the *Dashboard* to a call centre queue in the *Queued Calls* pane, click the name of the queue. In the main window selected queue is displayed with an expanded listing of calls in the queue. All other queues are collapsed.

QUEUED CALLS

- Billing Support 0/10 (0/10) X
- Customer Contact 0/10 (0/100) X
- Finance Support 0/10 (0/10) X
- Technical Support 0/10 (0/0) X
- Vendor Support 0/10 (0/10) X
- Premium Customer 4/10 (4/25) X**

Priority 0 (1)

- Veronica Jones (5555551602) 06:08 [06:08]

Priority 1 (1)

- Mona McKinley (5555551603) 05:36 [05:25]

Priority 2 (1)

- Louis Roy (5555551604) 04:44 [00:20]

Priority 3 (1)

- Jim Brian (5555551605) 00:00 [00:00]

To navigate from the *Dashboard* to an agent in the *Agents* directory, make sure that the *Show Agents* check box (on the row for the queue the agent is staffing), is checked and then click the agent's name. The selected agent is displayed expanded in the *Agents* panel.

End of Document

Thank you

Registered Office:

© **Virgin Media Business Ltd.**
500 Brook Drive
Reading
RG2 6UU

T: 0800 052 0800

Registered in England and Wales No. 01785381



BUSINESS