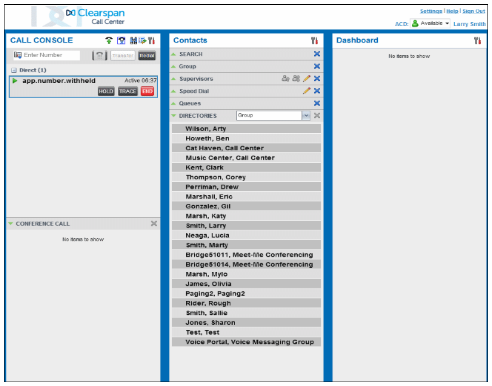
Clearspan® Hosted Thin Call Center

QUICK REFERENCE GUIDE

Agent Tasks



Call Center Interface

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

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

Agent Automatic Call Distribution (ACD) States

Your ACD state can be one of the following:

Available – You are available to receive calls.

Unavailable – You are not available to receive calls.

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

Configure Your Post Sign-In ACD State

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

Change Your ACD State and Set Unavailable Code

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

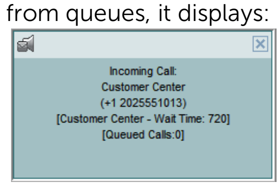
2. If the Unavailable Codes feature is enabled and you select Unavailable as your ACD state, a list of codes to choose from appears. Select the code that best describes the reason for your unavailability.

Select Your Outgoing Call Identity

1. In the Dialer, click Outbound CLID .
2. From the drop-down list, select the phone number to display when you are making a call.

View Incoming Call Details

If the Notification feature is enabled, a notification window appears on top of the system tray when you receive a call, displaying the name and number of the caller.
For calls from queues, it displays:



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

Open URL

You can open a Uniform Resource Locator (URL) page in your browser to obtain more information about an incoming or any current call. This page contains information about the calling party encoded in its URL.
In the Call Notification pop-up window that appears when you receive a call or in the

Clearspan®

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

Save vCard

When Outlook is running, you can save the caller's phone number and personal information as a vCard in Outlook.
In the Call Notification pop-up window that appears when you receive a call, click Add vCard.

Dial Ad Hoc Number

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

Call Contact

1. In the Contacts pane, click the contact to call and then click **CALL** for that contact. This dials the contact's default number.
2. To dial the contact's mobile number or any other available number, click the right Call button and select the number from the list.

Redial Number

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

Dial from Call History

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

Dial from Search

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

Answer Call

Calls can be answered automatically or manually.
To answer calls automatically:

In the Call Console, click **Auto Answer** .
Note that this feature works only if your device is Advanced Call Control (ACC)-compliant. In addition, if Auto Answer is enabled on the server, you must **not** enable Auto Answer in the client.
To answer a call manually:
Move the mouse over an incoming call and click **ANS**.

Blind Transfer Call

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

1. To transfer the call to an ad hoc number, enter the number in the Dialer and then click **Transfer**.
2. To transfer the call to a contact, click a contact in one of the contact's directories and then click **TXR** for that contact.
3. Alternatively, to transfer the call to the contact's mobile or any other available number, click the right Transfer button TXR and select the number from the list.

Transfer Call with Consultation

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

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

Transfer to Queue

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

Hold Call

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

Resume Call

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

End Call

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

Generate Call Trace

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

In the Call Console header, click **Trace**.

Tag ACD Call with Disposition Codes

More than one disposition code can be assigned to a call.
To assign disposition codes to a current call:

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

To assign disposition codes in Wrap-Up:

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

Start Three-Way Conference

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

Add Participant to Conference

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

Hold or Resume Conference

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

Leave Conference

You can only leave a Three-Way conference. In the Conference Call panel, click **LEAVE**. The other parties continue their conversation and the calls are removed from the Conference Call panel.

Drop Call from Conference

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

Hold Conference Participant

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

Resume Conference Participant

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

End Conference

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

Monitor Supervisor Phone State

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

1. In the Supervisors panel, click **Edit**.
2. In the dialog box that appears, select the supervisors to monitor.
3. Click **Save**. The selected supervisors have their phone state displayed.

Phone States

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

Make Emergency Call to Supervisor

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

Blind Escalate Call to Supervisor:

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

Escalate Call with Consultation

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

Escalate Call with Conference or Hand Over

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

Escalate Call with Mid-Conference Hold

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

Camp on Busy Contact

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

Sent E-mail to Contact

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

Record Call

To record selected calls in Call Center, your Call Recording service has to be set to "On Demand" via the web portal.
In the Call Console, select the call to record and click **Record**.

Pause Call Recording

In the Call Console, select a call that is being recorded and click **Pause**.

Resume Call Recording

In the Call Console, select a paused call and click **Resume**.

Stop Call Recording

In the Call Console, select a paused call and click **Stop**.

Display Call History

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

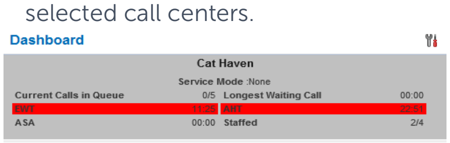
1. In the Call Console, click **Call History** .
2. To view call logs in a group, select the group from the Show drop-down list.

Delete Call History

1. In the Call Console, click **Call History** .
2. To delete a specific call log, select the call log to delete in the Call History dialog box and then click **Delete** for that call.
3. To delete all call logs, click **Delete All**.

Monitor Call Centers

1. In the Dashboard pane, click **Options** and select the Select Queues option. The Select Queues dialog box appears.
2. Check the call centers you want to monitor and click **Save**.
3. Click **Options** again and click Select Visible Fields.
4. In the Select Fields dialog box, check Select All to display all performance indicators. Or to show or hide some performance indicators, check or uncheck the corresponding check boxes.
5. Click **Save**. The Dashboard displays the selected performance indicators for the selected call centers.



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

Show or Hide Contacts

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

Search for Contacts

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

Note that the search is not case-sensitive.

Manage Speed Dial and Personal Directories

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

Note that you cannot modify a Personal entry.

View and Change Security Classification of Calls

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

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

Instant Messaging

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

Monitor IM&P Contacts

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

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

Alternatively, click the state icon of an unsubscribed contact .

Set Your IM&P State and Message

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

IM&P States

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

Accept IM&P Subscription Request

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

Chat with Contact

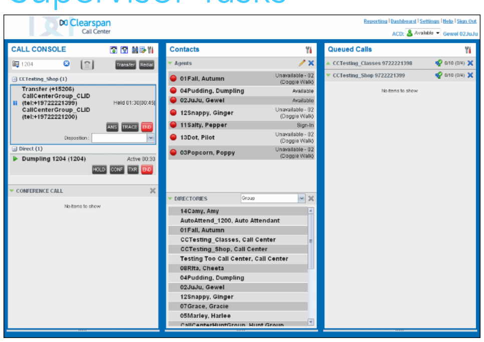
1. To chat with an IM&P contact, click the **Chat** button for the contact. A chat window appears.
2. Enter your message in the text box at the bottom of the window and press **ENTER**.

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

Create a Multi-User Chat

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

Supervisor Tasks



Monitor Agents

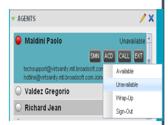
You monitor agents using the Agents panel located in the Contacts pane. This shows the real-time state of the agents who you supervise and it allows you to change the state of an agent.

To select agents to monitor:

1. In the Agents panel, click the **Edit** button .
2. In the dialog box that appears, check the agents to monitor.
3. Click **Save**.

- The selected agents have their combined phone and ACD state displayed as follows: Available, Busy, Unavailable, or Sign-Out, Ringing or Wrap-Up, Do Not Disturb, Private, and Forwarding. Agents who are not monitored have their state set to Unknown.

Change Agent's ACD State



1. In the *Agents panel*, click the agent and then click the ACD button for that agent.
2. From the drop-down list, select the new state.
3. If you selected *Unavailable*, you may also have to select an unavailability code.

View Agent Details

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

Make Agent Join/Leave Queue

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

Pick up Agent's Call

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

Silently Monitor Agent's Current Call

The agent to monitor must have exactly one active call.

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

Silently Monitor Agent's Next Call

In the *Agents panel*, click the target agent and then click *SMN*.

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

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

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

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

Un-mute Silently Monitored Call

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

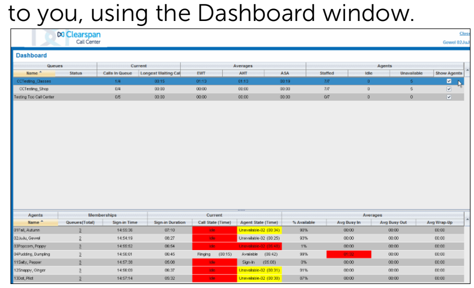
Barge In on Agent's Call

The agent must have exactly one active call.

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

View Agents and Queues Statistics

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



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

Note that by default, agent statistics are not displayed.

To display agent statistics for a call center:

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

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

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

Navigate from Dashboard to Agent or Queue

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

Monitor Queues

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

To select call centers to monitor:

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

The following information is displayed for each call center:

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

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

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

For each call, the following information is displayed:

- Call Status icon, which can be:
- Call is waiting to be answered.
- Message is being played to caller.
- Call was reordered.
- Call was bounced.
- Name/number of the call center (or DNIS, if applicable) that was called
- Total call time, and in parentheses, the time in the current queue (when applicable)

Clicking a call expands the call to show additional data:

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

Enable Night Service Override or Forced Forwarding

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

   Note that Forced Forwarding has precedence over Night Service Override.

Promote Call in Queue (Premium Call Center)

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

Position Call in Queue

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

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

Transfer Call to Top of Queue

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

Retrieve Call from Queue

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

Transfer Call from Queue to Agent

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

Transfer Call from Queue to Ad-Hoc Number

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

Transfer Call between Queues

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

Reporting

Call Center provides a set of reports about call centers and agents' performance. Additional reports may be defined by your system administrator. Since reports are configurable, the reports available to you depend on your system configuration. For information, consult your administrator.
Note that agents can only request reports about themselves.
Depending on the Receptionist configuration, supervisors may be able to open more than one Reporting window at the same time (up to a maximum of five).

Run Report

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

Schedule Report

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

Manage Scheduled Reports

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

Keyboard Shortcuts

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

Key	Equivalent Mouse Action
ESC	Click the Close button in a dialog box.
ESC	Cancel the changes.
/	Click the Dialer text box.
?	Click the Search text box.
ARROW DOWN	Click the scroll bar or the next item on a list.
ARROW UP	Click the scroll bar or the previous item on a list.
PAGE DOWN	Scroll down one page.
PAGE UP	Scroll up one page.
1....9	Select a call in the Call Console.
SPACEBAR	Click Answer on the selected incoming call in the Call Console.
<PERIOD>	Click End on the selected call in the Call Console.
ENTER	Click Dial.
ENTER	Click Search.
+	Click Transfer in the Dialer.
SHIFT+1.9	Select a ringing call and click Answer.
SHIFT+1.9	Select an active call and click Hold.
SHIFT+1..9	Select a held call and click Retrieve.
S or s	Click the Settings link.
B or b	Click the Back to Application link.
R or r	Click the Call History button.
H or h	Click the Help link.
D or d	Click the Dashboard link (Supervisor)
SHIFT+L or SHIFT+l	Click the Sign Out link.
SHIFT+A	Select Available (Agent).
SHIFT+U	Select Unavailable (Agent).
SHIFT+W	Select Wrap-Up (Agent).

More Information

For details on all the available features and options, refer to the Relevant documentation.