



# User Guide: Call Center

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# Call Center Portal

The Call Center is where a Call Center Supervisor manages their call queue(s), and where a Call Center Agent can view calls and log-in/out of their assigned queue(s).

There are an unlimited number of queues a single domain can have.

## 1.1 Accessing the Call Center

By default, Call Center Supervisors, Resellers, and Super Users have access to the Call Center. Office Managers can be configured to have access as well.

For users who have been provisioned with Call Center access, they will see a Call Center button in the Portal's top-level navigation panel, as seen in figure 1.1.a.



Figure 1.1.a

Basic rules for using the Call Center:

- A call queue must be configured before an agent can be assigned.
- A call queue can contain both on-net and off-net agents.
- Only online ("available") agents can be in an active queue.
- An agent is considered off-line ("unavailable") if their device is not configured.
- An agent can indicate the reason for their unavailability (lunch, break, meeting, other).
- Agents assigned to multiple queues can assign priority to one queue over another.

## 1.2 Understanding Site Precedence for Site Managers

Sites can be assigned to users, agents, and queues. Regarding a Site Manager provisioned with Call Center permissions, a call queue's Site setting takes priority, meaning a Site Manager can view all agents in queues assigned to their site, regardless of the agent's site. They cannot view queues and agents not assigned to their site - unless the agent is in a queue that is the same site as the Site Manager's site. This is a way that a Site Manager can view agents who are not in their site.

Example: Site Manager Marge has been assigned to the Phoenix site.

- Marge can view all queues that are assigned to the Phoenix site.
- Marge can view all agents that have been assigned to the Phoenix site.
- If an agent has been assigned to a different site, but they are a part of a Phoenix site call queue, then Marge can see this agent too.
  - Call Center Agent Tom's profile is assigned to the Detroit site, but he is also assigned to a Phoenix site call queue. Marge can see Tom as well.

## 1.3 Call Center Portal Layout

On the Call Center screen, as seen in figure 1.3.a, users with the scope of Call Center Supervisor and above can view a list of Call Queues, an Active Call Graph, a Stats Grid, and a list of all agents in those queues.

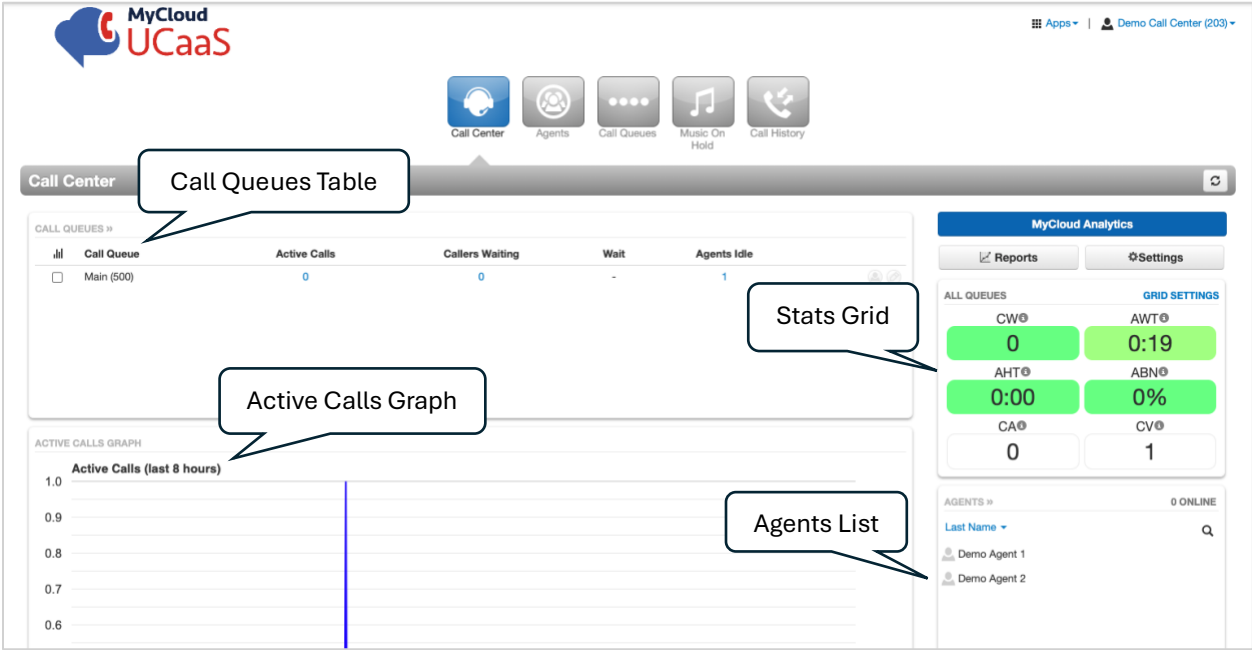


Figure 1.3.a

### 1.3.1 Call Queues Table

In the upper left-hand corner of the screen, the Call Queues table, as seen in figure 1.3.1.a, displays data in real-time: the number of Active Calls, the number of Callers Waiting, the current Wait time, and the number of Agents Idle.

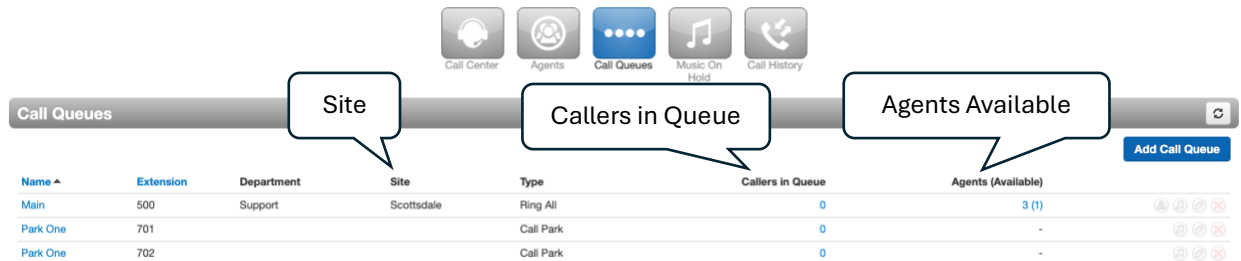


Figure 1.3.1.a

Edit Agents, Music on Hold, Call Queue, and Delete

### 1.4 Edit or Convert an Agent

The Call Queues table in the Call Center conveniently allows the editing, adding, and removing of agents directly from this screen. Click on the icon of a person to edit agents in a call queue row as seen in figure 1.4.a.

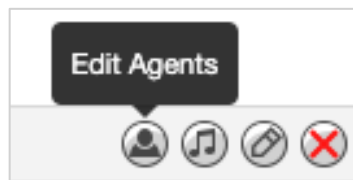


Figure 1.4.a

#### 1.4.1 Remove an Agent

In Edit Agents, click the X, as seen in figure 1.4.1.a, across from an agent to immediately remove them from the queue.

The screenshot shows a dialog box titled 'Edit Agents in Main' with a close button (X) in the top right corner. The dialog contains a table with columns for Agent, Phone/User, Auto Answer, Wrap-up Time, Max Calls, Max SMS, and Remove Agent. The 'Remove Agent' column has a red 'X' icon for each row.

Agent	Phone/User	Auto Answer	Wrap-up Time	Max Calls	Max SMS	Remove Agent
Demo Agent 1	204	No	30	1	2	
Demo Agent 2	205	No	30	1	2	
Remote Agent	14803627026	n/a	n/a	n/a	n/a	

Figure 1.4.1.a

## 1.4.2 Edit an Agent

In Edits Agents, click the pencil icon as seen in figure 1.4.1.a, to edit the agent's queue settings. Click Save Agent when finished as seen in figure 1.4.2.a.

- Status (offline or online)
- Wrap up time in seconds
- Maximum number of simultaneous calls (no more than 6)
- Maximum number of SMS messages (no more than 5)
- Agent's queue priority (1-99)
- Agent's order in a linear hunt, if applicable (1-99)
- Request confirmation from the agent when the call is answered (recommended for off-net agents)
- Select whether the user should auto-answer the call

### Edit Agents in Main

Agent Extension: 204 (Demo Agent 1)

Status: Offline

Note: Changing Status may take a moment to update

Wrap up time (sec): 0 to 595 (slider)

Max Simultaneous Calls: 1 to 6 (slider)

Max SMS Sessions: 0 to 5 (slider)

Queue priority for agent: 1

Request Confirmation

Agent	Phone/User	Auto Answer	Wrap-up Time	Max Calls	Max SMS	
Demo Agent 1	204	No	30	1	2	
Demo Agent 2	205	No	30	1	2	
Remote Agent	14803627026	n/a	n/a	n/a	n/a	

Figure 1.4.2.a

### 1.4.3 Add an Agent

In Edit Agents click Add Agent to open similar options as figure 1.4.2.a, with the addition of the agent selection field, as seen in figure 1.4.3.a.

#### Edit Agents in Main ✕

Add Agent(s) by ? User ▼

Agent Extension

Status Online ▼

**Note:** Changing Status may take a moment to update

Wrap up time (sec)  0 300 595

Max Simultaneous Calls  1 6

Max SMS Sessions  0 5

Queue priority for agent ▼

Request Confirmation

Cancel Save Agent

Agent	Phone/User	Auto Answer	Wrap-up Time	Max Calls	Max SMS	
Demo Agent 1	204	No	30	1	2	
Demo Agent 2	205	No	30	1	2	
Remote Agent	14803627026	n/a	n/a	n/a	n/a	

Add Agent Done

Click in this box to open a dropdown selection of all users in this domain.

Figure 1.4.3.a

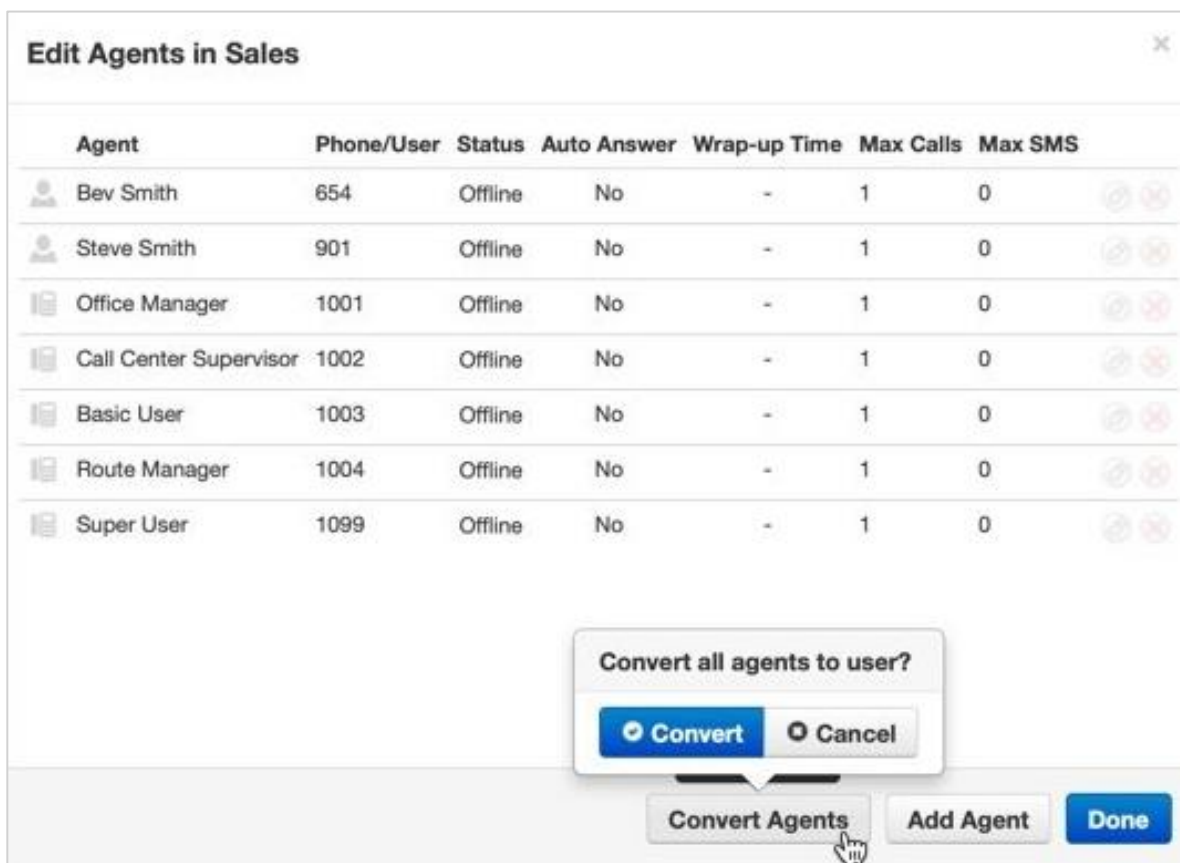
## 1.4.4 Convert Agents

Convert Agents is an admin UI configuration that converts agents from phones to users if there are phone-based agents in the call queue.

If there are no phone-based agents, or if this button has already been clicked, the option will not be available.

Click the Convert Agents button, as seen in figure 1.4.4.a. After agents have been converted, the screen will confirm with Migration Complete\*.

**\*Once complete, the process cannot be reversed.**



The screenshot shows a window titled "Edit Agents in Sales" with a close button (X) in the top right corner. Below the title is a table with the following columns: Agent, Phone/User, Status, Auto Answer, Wrap-up Time, Max Calls, and Max SMS. The table contains seven rows of agent data. At the bottom of the window, there are three buttons: "Convert Agents", "Add Agent", and "Done". A mouse cursor is hovering over the "Convert Agents" button, which has triggered a confirmation dialog box. The dialog box asks "Convert all agents to user?" and has two buttons: "Convert" (highlighted in blue) and "Cancel".

Agent	Phone/User	Status	Auto Answer	Wrap-up Time	Max Calls	Max SMS
Bev Smith	654	Offline	No	-	1	0
Steve Smith	901	Offline	No	-	1	0
Office Manager	1001	Offline	No	-	1	0
Call Center Supervisor	1002	Offline	No	-	1	0
Basic User	1003	Offline	No	-	1	0
Route Manager	1004	Offline	No	-	1	0
Super User	1099	Offline	No	-	1	0

Figure 1.4.4.a

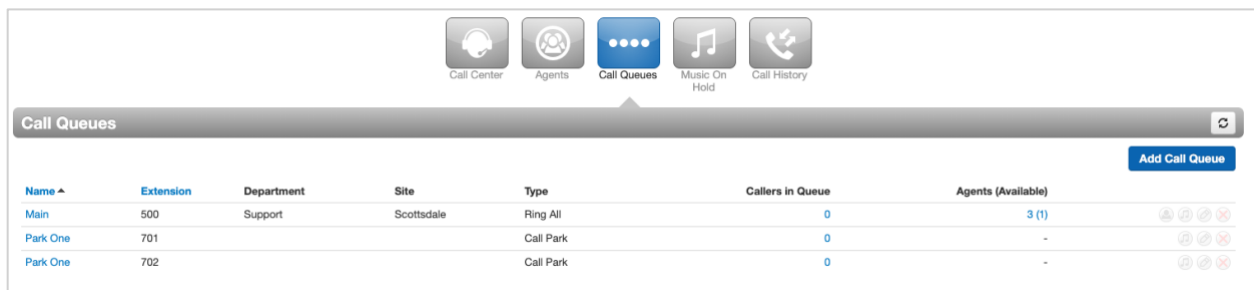


## 1.5 Call Queues Table Column Configurations

The following columns have further configurations in the Call Queues table, as seen in figure 1.5.a.

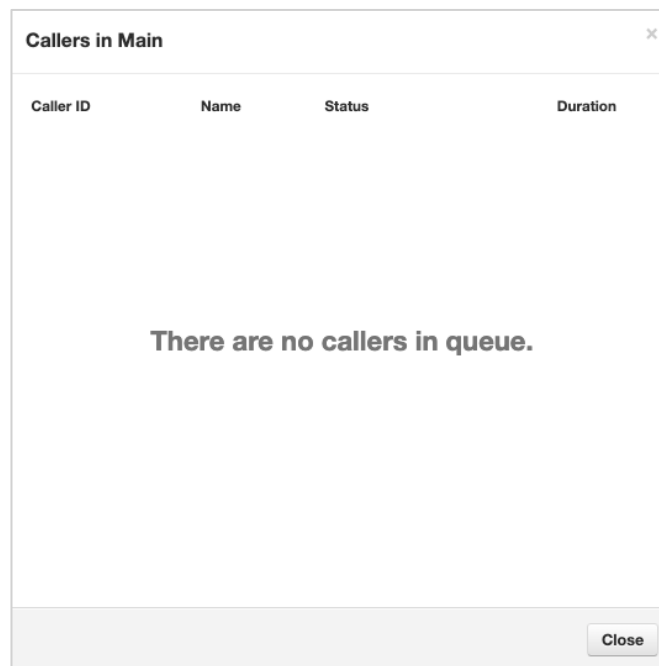
Clicking on the number of Callers in Queue (even if it's zero), as seen in figure 1.5.a, displays the call information in real-time, as seen in figure 1.5.b: the Caller ID, the Name, the Status of the call, and the current duration of the call since it entered the queue.

The status must be “talking” for the “listen” feature to work, and the agent's scope in the call must be lower than the user who is attempting to listen in.



Name ^	Extension	Department	Site	Type	Callers in Queue	Agents (Available)	
Main	500	Support	Scottsdale	Ring All	0	3 (1)	⊕ ⊖ ⓧ
Park One	701			Call Park	0	-	⊕ ⊖ ⓧ
Park One	702			Call Park	0	-	⊕ ⊖ ⓧ

Figure 1.5.a

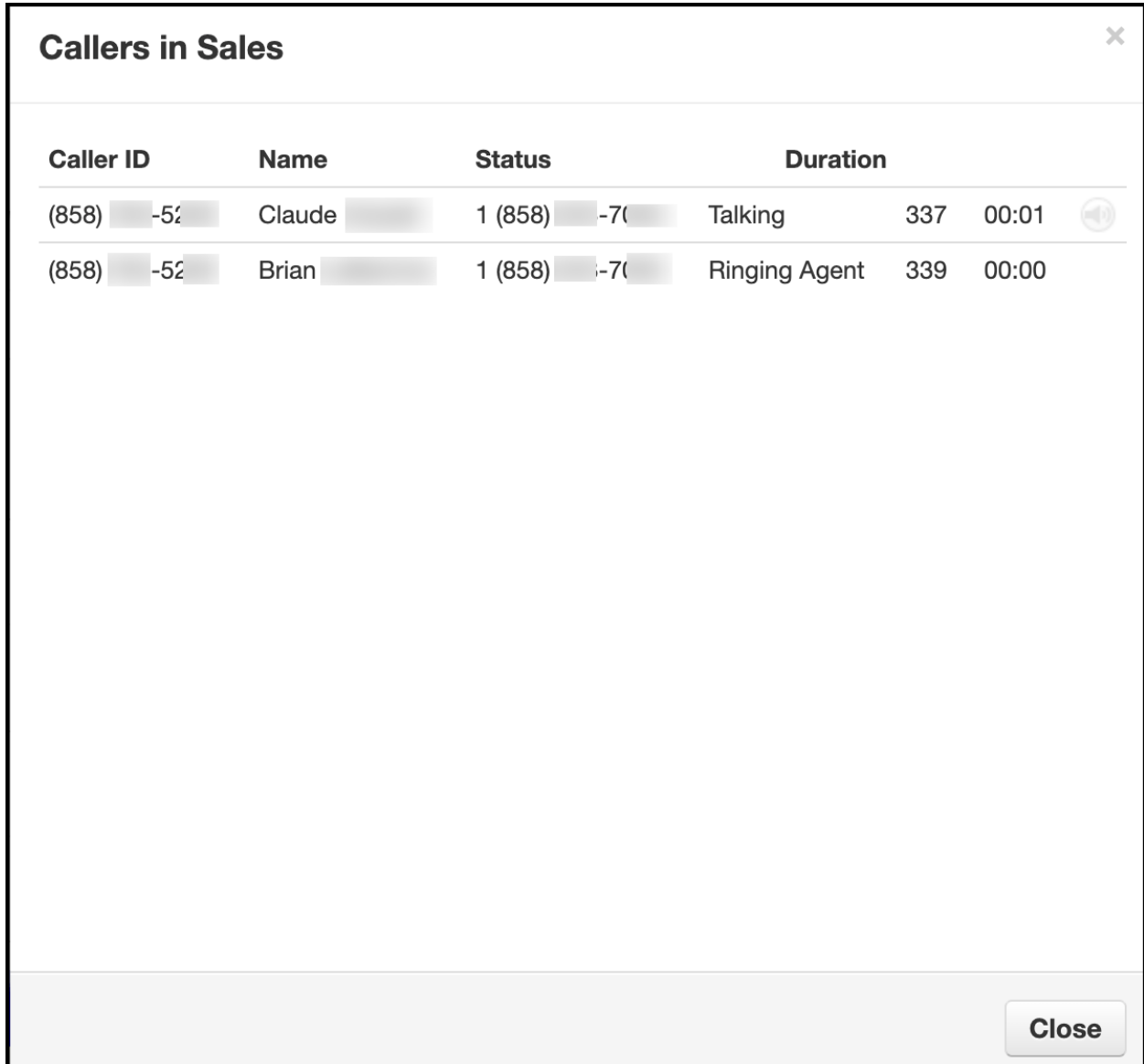


Caller ID	Name	Status	Duration
There are no callers in queue.			

Figure 1.5.b

## 1.5.1 Callers Waiting

Callers waiting displays the caller ID the call is originating from, the name of the caller (if available), the status of the call (such as "talking", "ringing agent"), and the current duration/time the caller has been on hold, as seen in figure 1.5.1.a



The screenshot shows a window titled "Callers in Sales" with a close button in the top right corner. The window contains a table with the following columns: Caller ID, Name, Status, and Duration. The table lists two callers: Claude and Brian. Claude is currently "Talking" with a duration of 00:01. Brian is currently "Ringing Agent" with a duration of 00:00. A speaker icon is visible next to the duration for Claude. A "Close" button is located at the bottom right of the window.


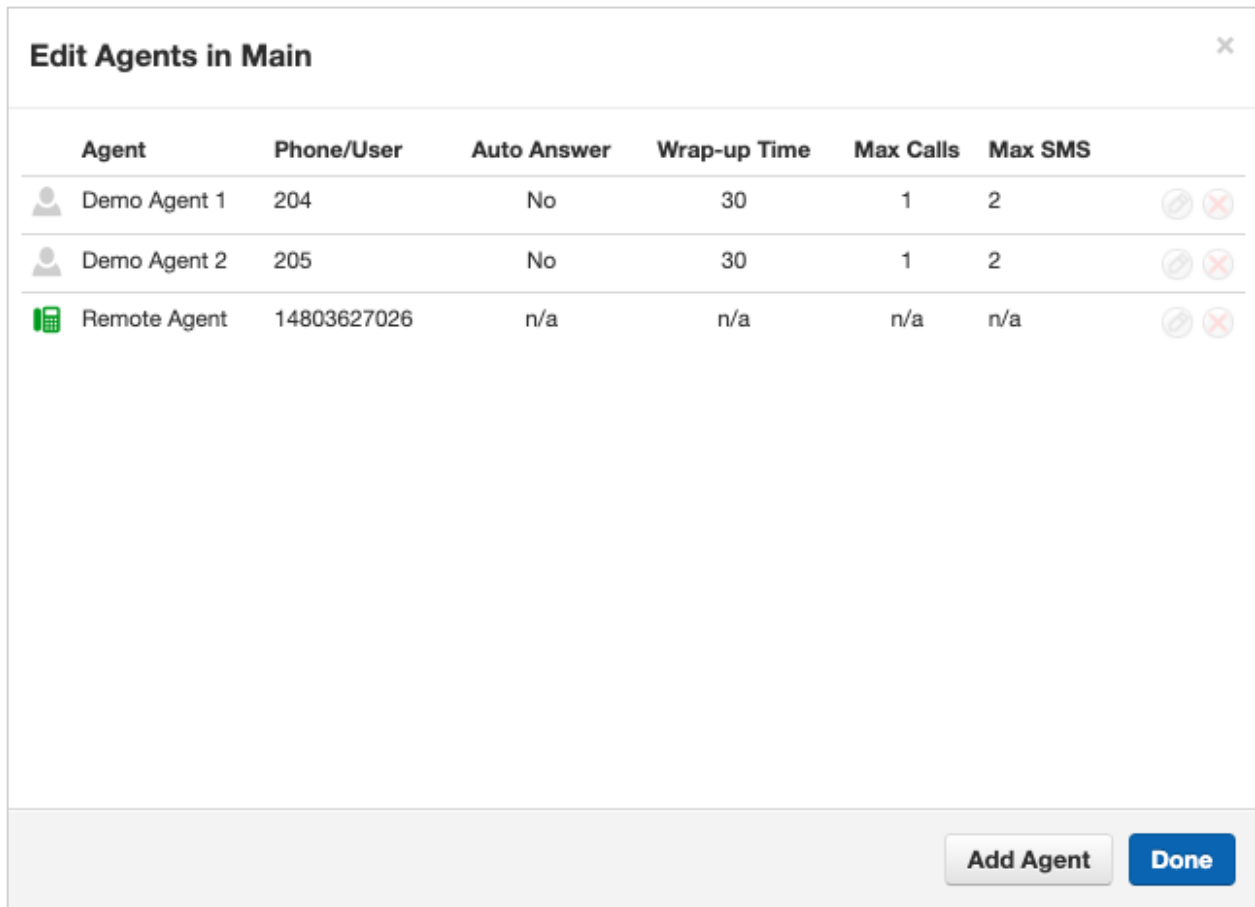
Caller ID	Name	Status	Duration
(858) [redacted]-52 [redacted]	Claude [redacted]	1 (858) [redacted]-70 [redacted]	Talking 337 00:01 
(858) [redacted]-52 [redacted]	Brian [redacted]	1 (858) [redacted]-70 [redacted]	Ringing Agent 339 00:00

Figure 1.5.1.a

## 1.5.2 Agents Idle

Clicking on the number of Agents Idle displays, all of the agents in the queue, as seen in figure 1.5.2.a. It includes the agent's phone or extension, whether they have Auto Answer enabled, the Wrap-up Time, the Max number of Calls they can receive at a time (no more than 6), and the Max number of SMS messages they can receive at a time (no more than 5).

**Adding, removing, editing, and converting agents on this screen is similar to doing so from the main Call Queues Table, as seen in figure 1.4.a.**












Agent	Phone/User	Auto Answer	Wrap-up Time	Max Calls	Max SMS	
 Demo Agent 1	204	No	30	1	2	 
 Demo Agent 2	205	No	30	1	2	 
 Remote Agent	14803627026	n/a	n/a	n/a	n/a	 

Figure 1.5.2.a

## 1.6 Active Calls Graph

The Active Calls graph, as seen in figure 1.6.a, represents the real-time data in the selected call queues. If none of the call queues are checked in the Call Queues table, then the default selection is all call queues.

The y-axis depicts the number of active calls in the last eight hours. If the graph is empty, or spinning, then there are no active calls to graph.

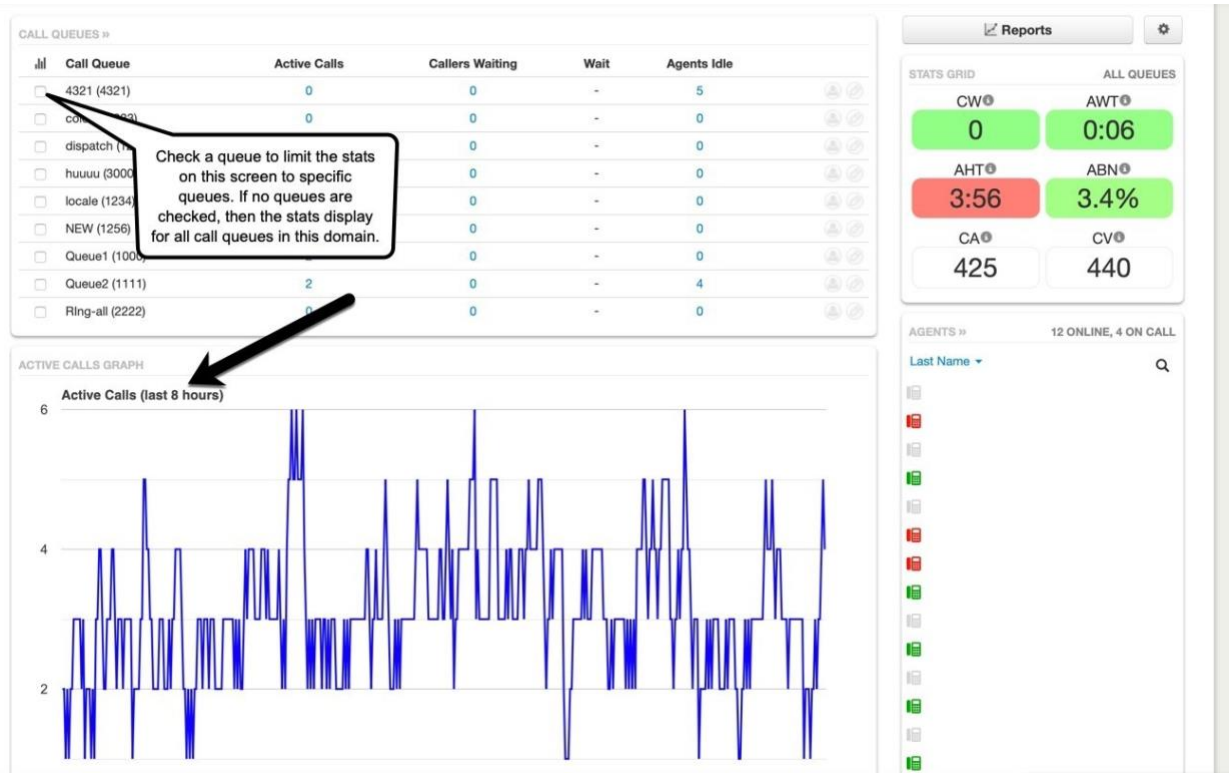


Figure 1.6.a

## 1.7 Stats Grid

The Stats Grid, as seen in figure 1.7.a, displays values based on color-coded thresholds to quickly identify when a configurable\* call queue limit has been reached or exceeded.

Example: A Call Center Supervisor can set an AWT (Average Wait Time) of 120 seconds as a lower threshold. Then, if the average caller wait time is less than 120 seconds, the AWT stat will be green. If the wait time exceeds 120 seconds, the stat will change to yellow. The Call Center Supervisor would also set an upper threshold where the yellow (warning) would then change to red, such as at 3+ minutes (180 seconds).

**The upper threshold should typically always be higher than the lower threshold.**

**Green** = the value is below the lower threshold

**Yellow** = the value is at or above the lower threshold and below the upper threshold

**Red** = the value is at or above the upper threshold

**White** = the threshold has not been configured, such as is the default for CA and CV

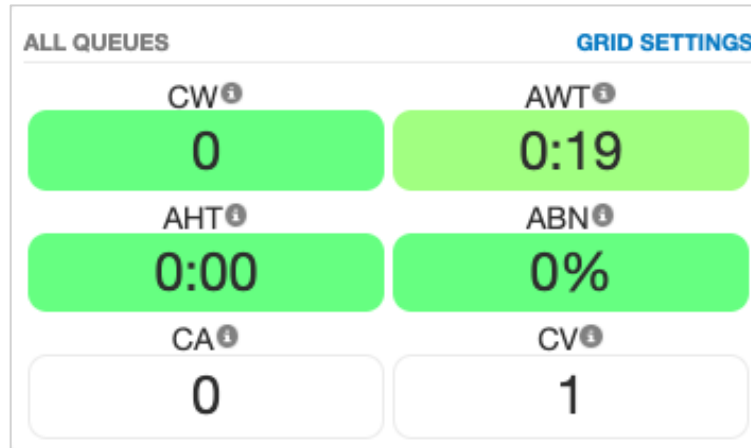


Figure 1.7.a

### Stats Grid Abbreviation Key\*

CW (Callers Waiting)	The active number of callers waiting in the selected call queue. If no queue is selected, all call queues are represented.
AWT (Average Wait Time)	The average time a caller spent in the call queue before being dispatched to an agent.
AHT (Average Handling Time)	This time includes Talk Time, Hold Time, and Disposition Time.
SL (Service Level)	This is the ratio of calls meeting the service level agreement that is configured under the stats grid settings >> general tab.
ABN (Abandon Rate)	This is the percentage of calls abandoned, over the total calls offered.
CA (Calls Answered)	This is the number of calls answered by all agents in the call queue.
CV (Call Volume)	This is the number of calls originating in the call queue, including abandoned calls, answered calls, voicemails, and forwards.

**\*If the Stats Grid thresholds are not configured, then the grid will default to the following behavior:**

- Lower thresholds are 0 (blank) and will color-code as yellow when they reach 70% of the default upper threshold value.
- The CW (Callers Waiting) upper threshold is 5.
- The AWT (Average Wait Time) upper threshold is 60 (seconds).
- The AHT (Average Handling Time) upper threshold is 240 (seconds).
- The ABN (Abandon Rate) upper threshold is 15 (percent).
- CA (Calls Answered) and CV (Call Volume) do not have default upper thresholds and will color-code as white, no matter the number of calls answered or the call volume.

### 1.7.1 Edit Thresholds

Edit thresholds by clicking on the Stats Grid Settings link, as seen in figure 1.7.1.a. You can toggle on or off various stats and adjust thresholds as seen in figure 1.7.1.b. Click Save to save changes. Then click on the Settings button with the gear to access further settings, as seen in figure 1.7.1.c to edit the Service Level Agreement. This is the acceptable amount of time in which a call needs to be answered.

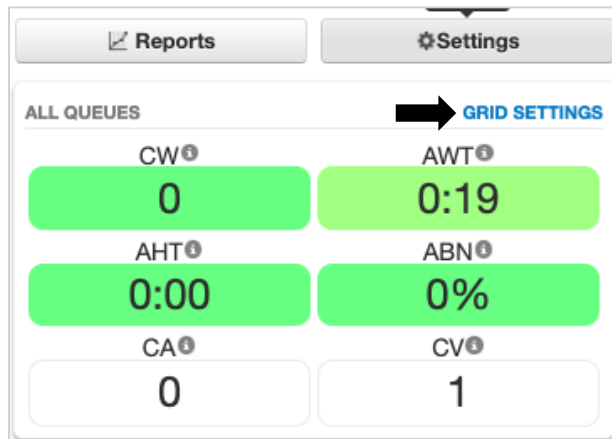


Figure 1.7.1.a

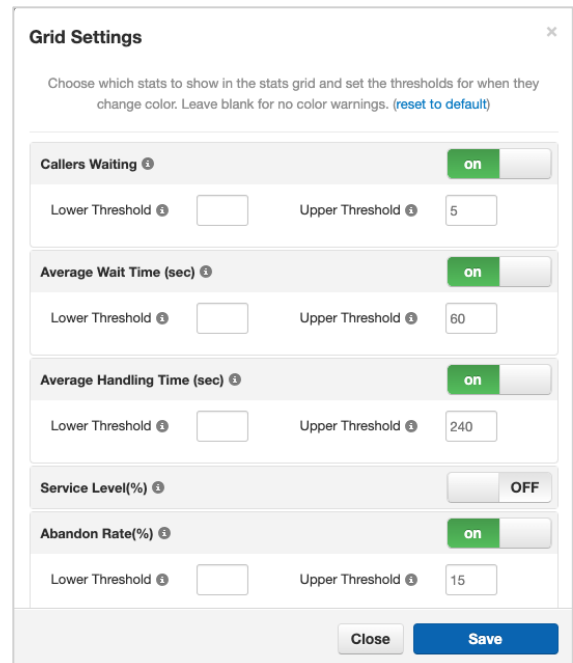


Figure 1.7.1.b

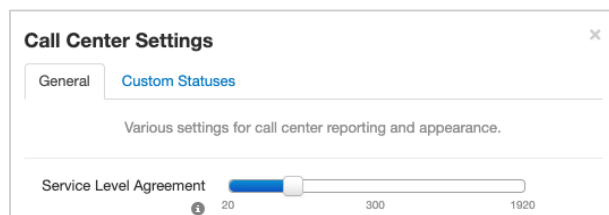


Figure 1.7.1.c

## 1.8 Agents Table

In the bottom right-hand corner of the Call Center portal is the Agents table as seen in figure 1.8.a. View an agent's call stats, assigned queues (including current status), and the option to "listen". Agents in this table are color-coded as follows:

**Grey** = offline

**Green** = online & available

**Red** = online & unavailable

Only online agents can be a part of a call queue.

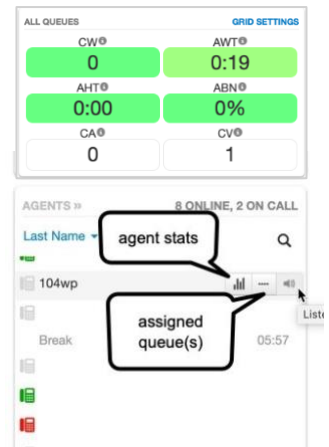


Figure 1.8.a

## 1.9 Agent Stats

An agent's calls are graphed for the past 10 days. More specifically, the last 24 hours includes a breakdown of call types, time talked, etc., as seen in figure 1.9.a. Any status other than offline is considered online, therefore an agent's Logged In time begins incrementing once a status is changed to something other than offline, including Lunch etc.

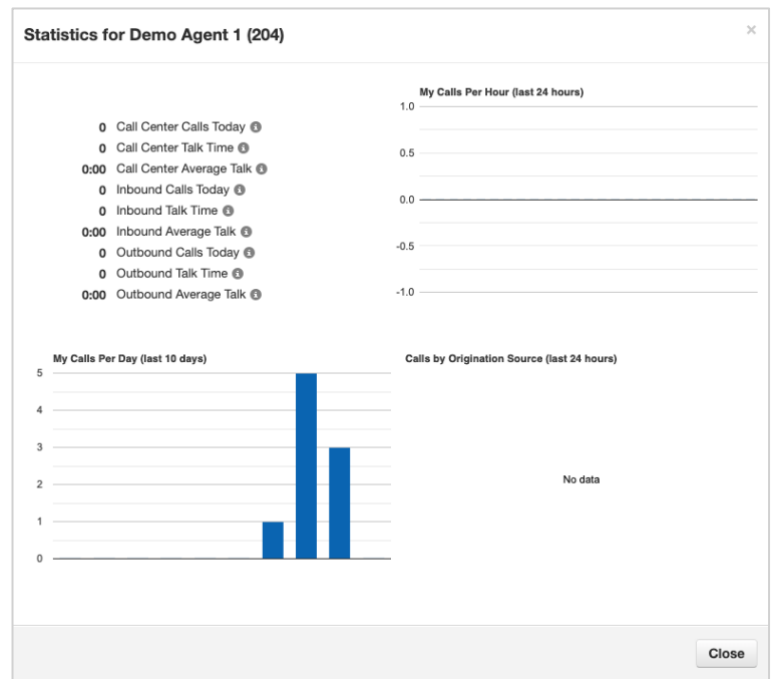


Figure 1.9.a

## 1.9.1 Assigned Queue(s)

Assigned Queue lists the call queues the agent is in, as seen in figure 1.9.1.a. If the agent has forgotten to log-off for the day, their status can be changed here (offline or online). Their queue priority can also be changed. The lowest number equals the highest priority (i.e. 1 is the highest priority and calls in that queue will be routed to the agent first).

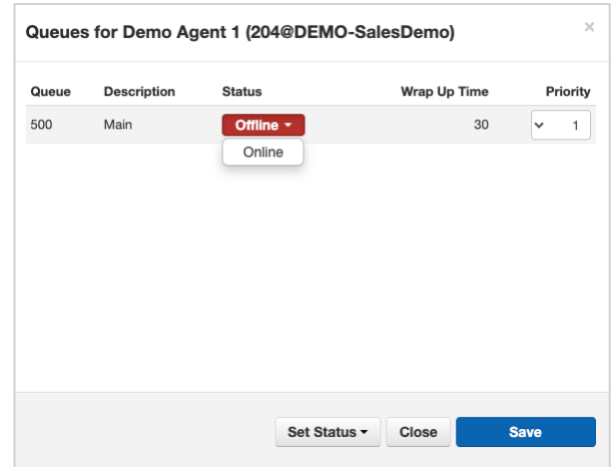


Figure 1.9.1.a

## 1.10 Listen

Listening to calls is an available feature for on-net and off-net calls when the status of a call is talking as seen in figure 1.10.a. However, the scope of the user listening in must be higher than the scope of the agent in the call.

Example: a Call Center Supervisor will not have the option to listen in to a call where the agent is another Call Center Supervisor, but they can listen in to the calls of Call Center Agents.

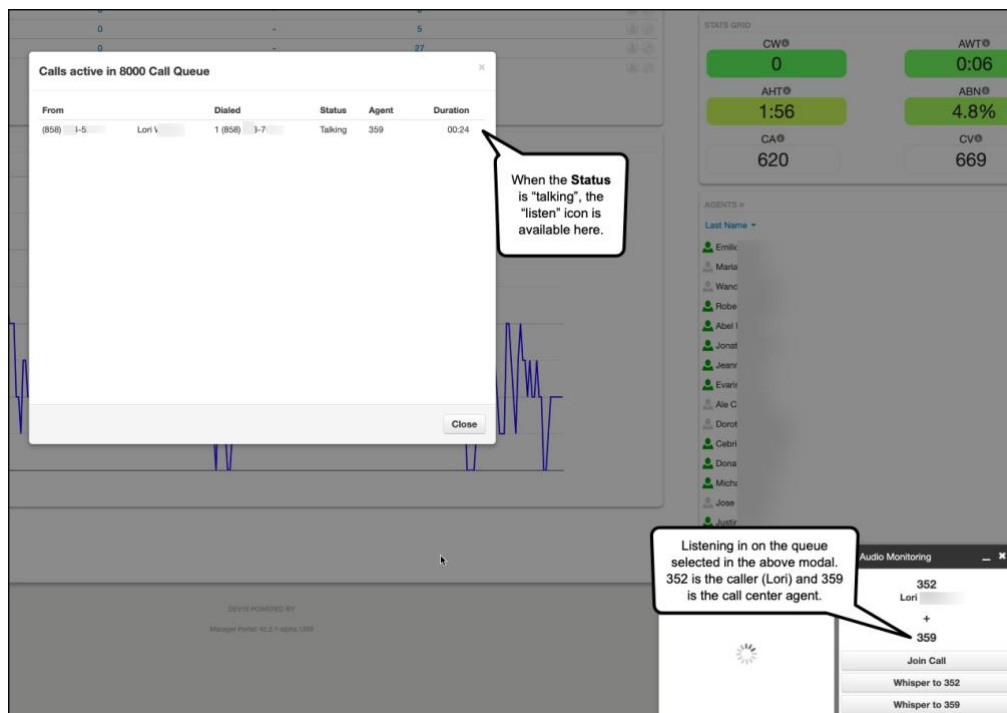


Figure 1.10.a