



Hosted VoIP Phone System

Blue Platform

Admin Portal Guide for Call Center Administration

1 Table of Contents

1	About this Guide	3
2	Accessing the Hosted VoIP Phone System Administration Portal	4
3	Hosted VoIP Phone System Admin Portal Interface (Enterprise Administrators)	5
4	Call Center (Enterprise Level Admin)	6
4.1	Agent Unavailable Codes for all Enterprise Call Centers	7
4.1.1	Adding Agent Unavailable Codes (Enterprise)	8
4.1.2	Delete or Edit an Agent Unavailable Code (Enterprise)	8
4.2	Call Disposition Codes	10
4.2.1	Adding Disposition Codes for all Enterprise Call Centers	10
4.2.2	Delete or Edit Call Disposition Codes for all Enterprise Call Centers	11
4.3	Agent Default Settings for all Enterprise Call Centers	12
4.3.1	Guard Timer Setting	12
4.3.2	Agent Unavailable Settings for all Enterprise Call Centers	12
4.4	Call Center Routing Policies for all Enterprise Call Centers	13
4.5	Call Center Enhanced Reporting Branding	13
4.6	Call Center External Reporting Settings	14
5	Hosted VoIP Phone System Admin Portal Interface (Group Administrators)	15
6	Accessing Call Center Configurations (Group Admin)	16
6.1	Navigating to the Dashboard	16
6.2	Navigating to the Group Services – Call Centers	17
7	Dashboard (Group Admin Interface)	18
7.1	Call Centers Module (Group Admin Dashboard)	18
7.1.1	Call Center Status	18
7.1.2	Call Center Name	18
7.1.3	Call Center Number	19
7.1.4	Call Center Calls	19
7.1.5	Call Center Settings	20
8	Group Services (Group Admin)	26
8.1	Call Center	27
8.1.1	Call Center – Profile	28
8.1.2	Call Center Profile Announcements	35

8.1.3	Call Center Profile Distinctive Ringing.....	42
8.1.4	Call Center Dialed Number Identification Service (DNIS)	43
8.1.5	Call Center Profile Queue Notifications	52
8.1.6	Call Center Call Disposition Codes	53
8.1.7	Call Center Calling Features	54
8.1.8	Call Center My Calls	54
8.1.9	Query Call Details – Sort By	55
8.1.10	Query Call Details – Date Range	56
8.1.11	Query Call Details – Include	57
8.1.12	Query Call Details – Search By	57
8.1.13	Query Call Details – Create Report	58
8.1.14	Query Call Details – Exporting	59
8.1.15	Call Center – Last 20 Calls	62
8.2	Call Center Routing Policies for Individual Call Centers	62
8.2.1	Call Center Forced Forwarding	63
8.2.2	Call Center Holiday Service	65
8.2.3	Call Center Night Service.....	66
8.2.4	Call Center Bounced Calls	68
8.2.5	Comfort Message Bypass.....	69
8.2.6	Overflow	70
8.2.7	Call Center Stranded Calls.....	71
8.3	Call Center Utilities	72
8.3.1	Call Center Enterprise Directory	72
8.3.2	Call Center Document Repository.....	73
8.3.3	Call Center Registrations.....	73
8.3.4	Call Center Features Access Codes	73
8.4	Call Center Navigation	74
9	Hosted VoIP Phone System Admin Portal Interface (User Access).....	75
9.1	Call Center – Agent (User Administration).....	76
9.2	Call Center – Supervisor (User Administration)	77
9.2.1	Client Applications – (Calling Features)	78

1 About this Guide

The Call Center Administration Guide is designed to assist administrators with the configuration of existing Call Centers from multiple levels of administration through the Hosted VoIP Phone System Administration Web Portal. Access to all of the features and settings that are outlined within this guide will vary depending on the level of administrative access you have permission to as well as the type of Call Center your organization is licensed for.

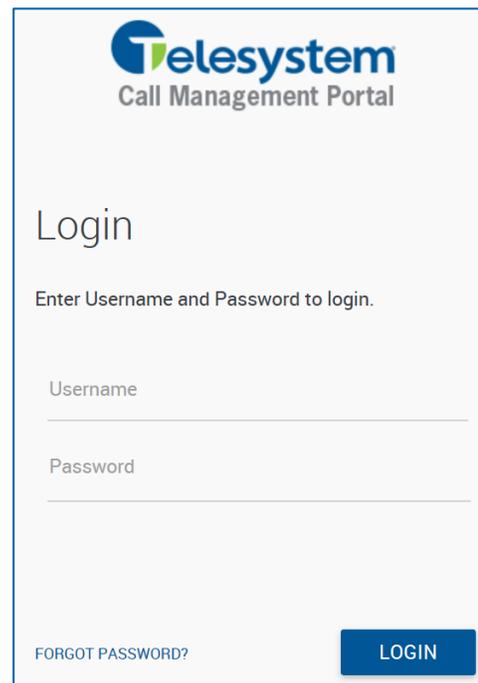
Additional information regarding the Hosted VoIP Phone System Administration Web Portal can be found in the following guides:

- Hosted VoIP Phone System Admin Portal Guide for Enterprise Administrators
- Hosted VoIP Phone System Admin Portal Guide for Group Administration
- Hosted VoIP Phone System Admin Portal Guide for User Administration

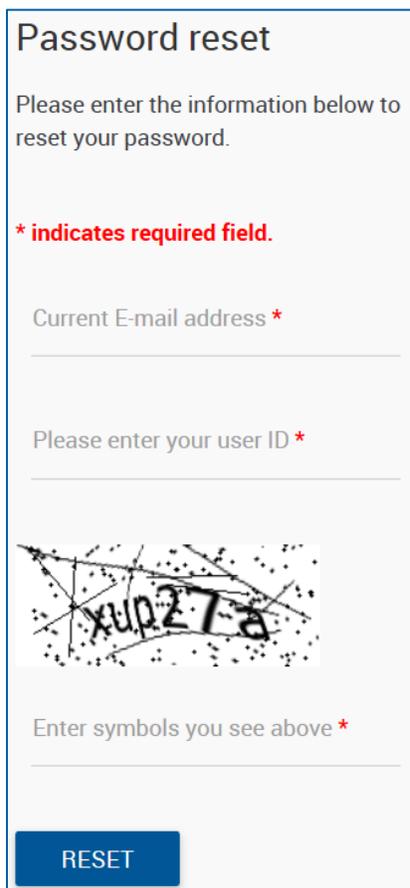
2 Accessing the Hosted VoIP Phone System Administration Portal

To access the Hosted VoIP Phone System Administration (Admin) Portal, navigate to <https://admin.euserportal.com> on your web browser.

When presented with the login page, enter your credentials for the Username and Password and then click on the **Login** button.



The screenshot shows the login page for the Telesystem Call Management Portal. At the top, there is the Telesystem logo and the text "Call Management Portal". Below this, the word "Login" is displayed in a large font. Underneath, it says "Enter Username and Password to login." There are two input fields: "Username" and "Password". At the bottom left, there is a link that says "FORGOT PASSWORD?". At the bottom right, there is a blue button labeled "LOGIN".

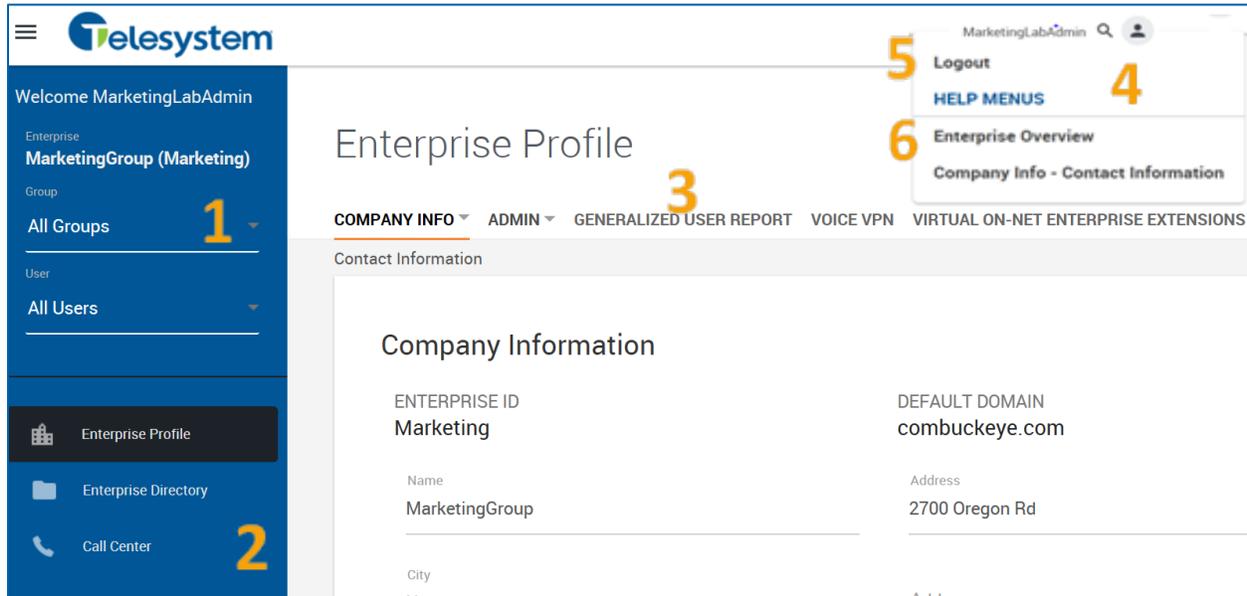


The screenshot shows the password reset page. At the top, it says "Password reset". Below that, it says "Please enter the information below to reset your password." There is a red asterisk followed by the text "* indicates required field." There are two input fields: "Current E-mail address *" and "Please enter your user ID *". Below these fields is a CAPTCHA image showing the word "XUD27-a" in a stylized font. Below the CAPTCHA, there is another input field labeled "Enter symbols you see above *". At the bottom left, there is a blue button labeled "RESET".

If you have forgotten your password, click on the “**Forgot password?**” link and the system will provide you with a password reset option using Completely Automated Public Turing Test to Tell Computers and Humans Apart (CAPTCHA) technology.

3 Hosted VoIP Phone System Admin Portal Interface (Enterprise Administrators)

Once you have logged into the portal you will be presented with the following interface:



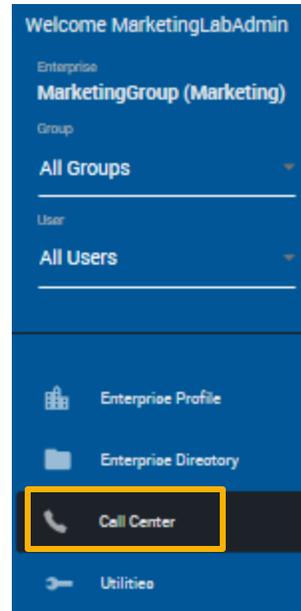
1	Navigation Drop-down menus	These drop-down menus allow you to navigate from the Enterprise to a Group or directly to an individual user and vice versa.
2	Navigation Tabs	These tabs will allow you to navigate between the different sections available to you based on the navigation drop-down menu that has been selected. The tabs will change if you have selected a group or user.
3	Menus	This is where you will find the menu options available based for the current tab. These menu options will change for each tab. Many of the Menu Options will contain sub-options. This is indicated by a down arrow <input type="checkbox"/> on the menu option. Mousing over the menu will provide you with a pop-up list of sub-options.
4	Search	Generates a menu to find a specific Group or User using search fields. Available fields for Group search include: Group Name and Group ID. Available fields for User search include: Phone Number, First Name, Last Name, User ID, Group ID, and Department.
5	Username/Logout	Shows the Logged In Username and the link to Logout. These will display statically as you navigate through the Hosted VoIP Phone System Admin Portal.
6	Help Menus	Help Menus indicates that there is a help page available for options that are displaying on the current page.

4 Call Center (Enterprise Level Admin)

Access the Call Center Settings for Enterprise from the Call Center tab. The Call Center Settings for Enterprise allow you to configure certain settings that will apply to all Call Centers assigned with all groups of the enterprise.

The Call Center settings available at the enterprise level include:

- Agent Unavailable Codes
- Call Disposition Codes
- Agent Default Settings
- Call Center Routing Policies
- Call Center Enhanced Reporting Branding
- Call Center External Reporting Settings



4.1 Agent Unavailable Codes for all Enterprise Call Centers

Agent Unavailable Codes assigned here will be available to agents in all Call Centers assigned to groups within the enterprise through their ACD state drop-down option in the Call Center graphical user interface (GUI).

From this section, you may add, edit, and delete custom unavailable codes and then assign default codes for agent actions.

For example, a code “B” with the description of “BREAK” can be created and made active. This code can then be assigned as the “Default Code on **Do Not Disturb activation**” so that any time an agent in a Call Center within the enterprise activates the do not disturb feature, their ACD state will automatically become “B – BREAK”.

Agent Unavailable Codes		
: Search <input type="text"/> X Q		
<input type="checkbox"/> Code ↑	Is Active	Description
<input type="checkbox"/> A	Y	LUNCH
<input type="checkbox"/> B	Y	BREAK
<input type="checkbox"/> C	Y	CALL OUTS
<input type="checkbox"/> D	Y	COACHING
<input type="checkbox"/> H	Y	HUDDLE
<input type="checkbox"/> M	Y	DEPARTMENT MEETING
<input type="checkbox"/> P	Y	PERSONAL CALLS
<input type="checkbox"/> R	Y	RONA
<input type="checkbox"/> W	Y	WORK

CALL CENTER SETTINGS CALL CENTER SCHEDULED REPORTS

Call center settings for Enterprise

Agent Unavailable Codes

Enable Agent Unavailable Codes

Default Code on Do Not Disturb activation
--None--

Default Code on personal calls
P-PERSONAL CALLS

Default Code on consecutive bounces
R-RONA

Default Code on not reachable
R-RONA

Force use of Agent Unavailable Codes with Default Code
--None--

4.1.1 Adding Agent Unavailable Codes (Enterprise)

1. Click the **Add** button at the bottom of the section.



2. A pop-up box will appear with options for: **Active, Code, Description.**
3. Check the **Active** box to make the code usable. Enter the desired code and description. The code may only be 10 characters long.
4. Click the **Add** button.

4.1.2 Delete or Edit an Agent Unavailable Code (Enterprise)

To Delete an Agent Unavailable Code:

1. Check the box immediately preceding the code(s) you want to delete.
2. Click on the **Delete** button.
3. A system text box will pop up stating “Confirm to delete checked Unavailable Code.” Click the **Delete** button.

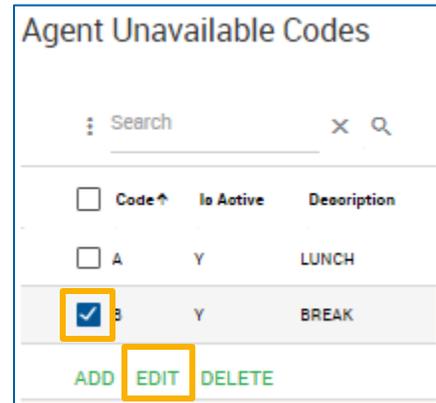
Code	Is Active	Description	
<input type="checkbox"/>	A	Y	LUNCH
<input checked="" type="checkbox"/>	B	Y	BREAK

The page will refresh and the code(s) will no longer be available.

To Edit an Agent Unavailable Code:

1. Check the box immediately preceding the code you want to edit.
2. Click the **Edit** button.

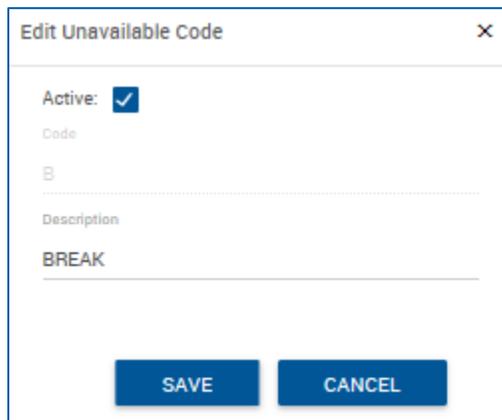
Note: If multiple codes are selected, the Edit button will be unavailable (greyed out).



Agent Unavailable Codes		
Search <input type="text"/> X Q		
<input type="checkbox"/> Code ↑	Is Active	Description
<input type="checkbox"/> A	Y	LUNCH
<input checked="" type="checkbox"/> B	Y	BREAK

ADD EDIT DELETE

3. The Edit Unavailable Code box will appear with the same options available when adding a new code. From here you may uncheck the Active box to make the code unavailable or change the description. The actual code cannot be changed. If you want to change the actual code, you must create the desired code as a new code and add the desired description, then delete (or deactivate) the old code.



Active:

Code
B

Description
BREAK

SAVE CANCEL

4. Click the **Save** to keep changes.

4.2 Call Disposition Codes

Call Disposition Codes can be assigned to calls during or immediately after a call through the Call Center GUI by an agent. Call Center Supervisors and group administrators may then use the Call Center reporting feature to access reports with the disposition codes in order to analyze call trends.

This section allows you to display, add, edit, and remove Call Disposition Codes that can be used in any Call Center configured in you enterprise.

Call Disposition Codes

X Q

<input type="checkbox"/>	Code	Is Active	Description ↑
<input type="checkbox"/>	1	Y	Billing
<input type="checkbox"/>	4	Y	CAN WE SERVE
<input type="checkbox"/>	3	Y	Product Information
<input type="checkbox"/>	2	Y	Technical

4.2.1 Adding Disposition Codes for all Enterprise Call Centers

1. Click the **Add** button at the bottom of the Call Disposition Codes section.



2. The **Add Disposition Code** box will appear. Check the **Active** box to make the code available, enter in a Code and Description. The actual code may only be 10 characters long.
3. Click **Add** to save the new code.

Add Disposition Code
X

Active:

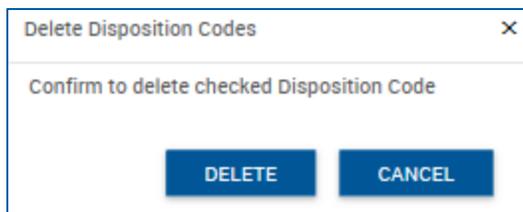
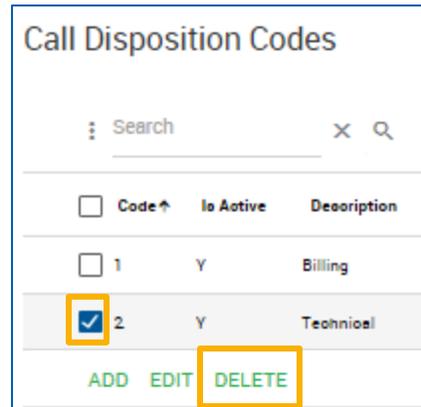
Code

Description

4.2.2 Delete or Edit Call Disposition Codes for all Enterprise Call Centers

To Delete a Call Disposition Code:

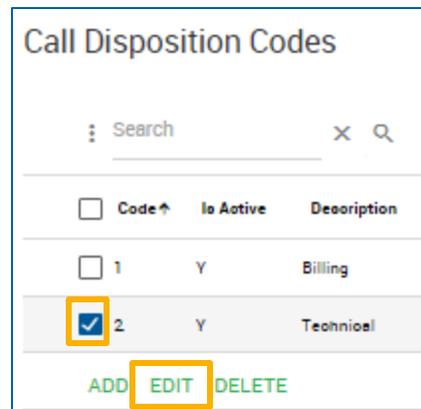
1. Place a check in the box immediately preceding the code(s) you want to delete.
2. Click on the **Delete** button.
3. The **Delete Disposition Codes** confirmation window will pop-up asking you **Confirm to delete Disposition Codes**. Click on the **Delete** button.



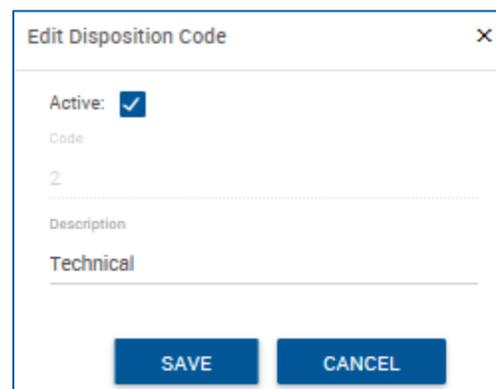
The page will refresh and the selected code(s) will no longer be available.

To Edit a Call Disposition Code:

1. Place a check in the box immediately preceding the code you want to edit.
 2. Click on the **Edit** button.
- Note:** If multiple codes are selected, the Edit button will be unavailable (greyed out).



3. The **Edit Disposition Code** window will populate with the same options available when adding a new code. From here you may uncheck the Active box to make the code unavailable or change the description. The actual code cannot be changed. If you want to change the actual code, you must create the desired code as a new code and add the desired description, then delete or deactivate the old code.



4. Click **Save** to keep changes.

4.3 Agent Default Settings for all Enterprise Call Centers

The Agent Default Settings provides you with access to setting the Guard Timer Setting and Agent Unavailable Settings.

Agent Default Settings

Use Guard Timer Setting: Default Enterprise

Enable guard timer for 5 seconds

Use Agent unavailable settings: Default Enterprise

Force Agent to unavailable on Do Not Disturb activation

Force Agent to unavailable on personal calls

Force agent to unavailable after 3 consecutive bounces

Force Agent to unavailable on not reachable

SAVE

4.3.1 Guard Timer Setting

The purpose of the Guard Timer is to allow a delay between calls to agents without using call wrap-up in situations where the agent uses a device such as an analogue phone that has hook status unaligned with call status or where regulatory requirements specify minimum call inter-arrival times for agents.

For the Use Guard Timer Setting, select **Default** or **Enterprise**. Then select Enable guard timer and set the amount of time from the Seconds drop-down list to configure the amount of time.

To save your changes, click the **Save** button for this section.

4.3.2 Agent Unavailable Settings for all Enterprise Call Centers

Agent Unavailable Settings for Call Center allow you to force agents into an unavailable ACD state when certain criteria are met. The following options are available (administrators can select one or more options at a time):

- Force Agent to unavailable on Do Not Disturb activation
- Force Agent to unavailable on personal calls
- For agent to unavailable after x consecutive bounces
- Force Agent to unavailable on not reachable

To save your changes, click the **Save** button for this section.

4.4 Call Center Routing Policies for all Enterprise Call Centers

Call Center Routing Policies allow you to determine how calls should be routed to agents when there are agents assigned to multiple Call Centers. The routing policy options available are Longest Wait Time and Priority Order. By default, this option is set to the Longest Wait Time so that the oldest call in queue is routed first. Selecting Priority Order allows you to rank the Call Centers assigned in your enterprise in order of importance (1 being the highest). Calls in the highest ranked Call Center will be distributed to agents first, then the second Call Center, and so on.

Call Center Routing Policies

Routing Policy:

Longest Wait Time Priority Order

CALL CENTER NAME	PRIORITY
Marketing CC 2	1
Premium Call Center Test	2

SAVE

4.5 Call Center Enhanced Reporting Branding

This section is used to change the branding of Call Center reports for your enterprise. It allows you to specify whether you want to use system-level or custom branding.

To use system-level branding, select **System** or to provide custom branding, select **Custom**.

If you selected custom branding, upload a branding file by clicking the **Choose File** button and then navigate to the file on your local or network drive.

Save your changes by clicking on the **Save** button for this section.

Call Center Enhanced Reporting Branding

System Custom

Load Branding **Browse...**

File:

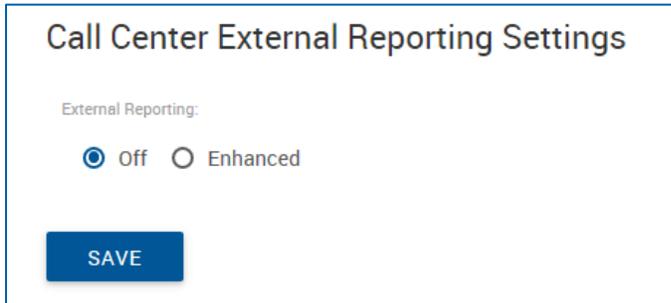
SAVE

4.6 Call Center External Reporting Settings

The Call Center External Reporting Settings allow you to turn external reporting on or off. These settings apply to all Call Centers in your enterprise.

To turn external reporting off select **Off** and then click the **Save** button for this section. Reports will only be available through the Call Center GUI.

To turn external reporting on, select **Enhanced** and then click on the **Save** button for this section.



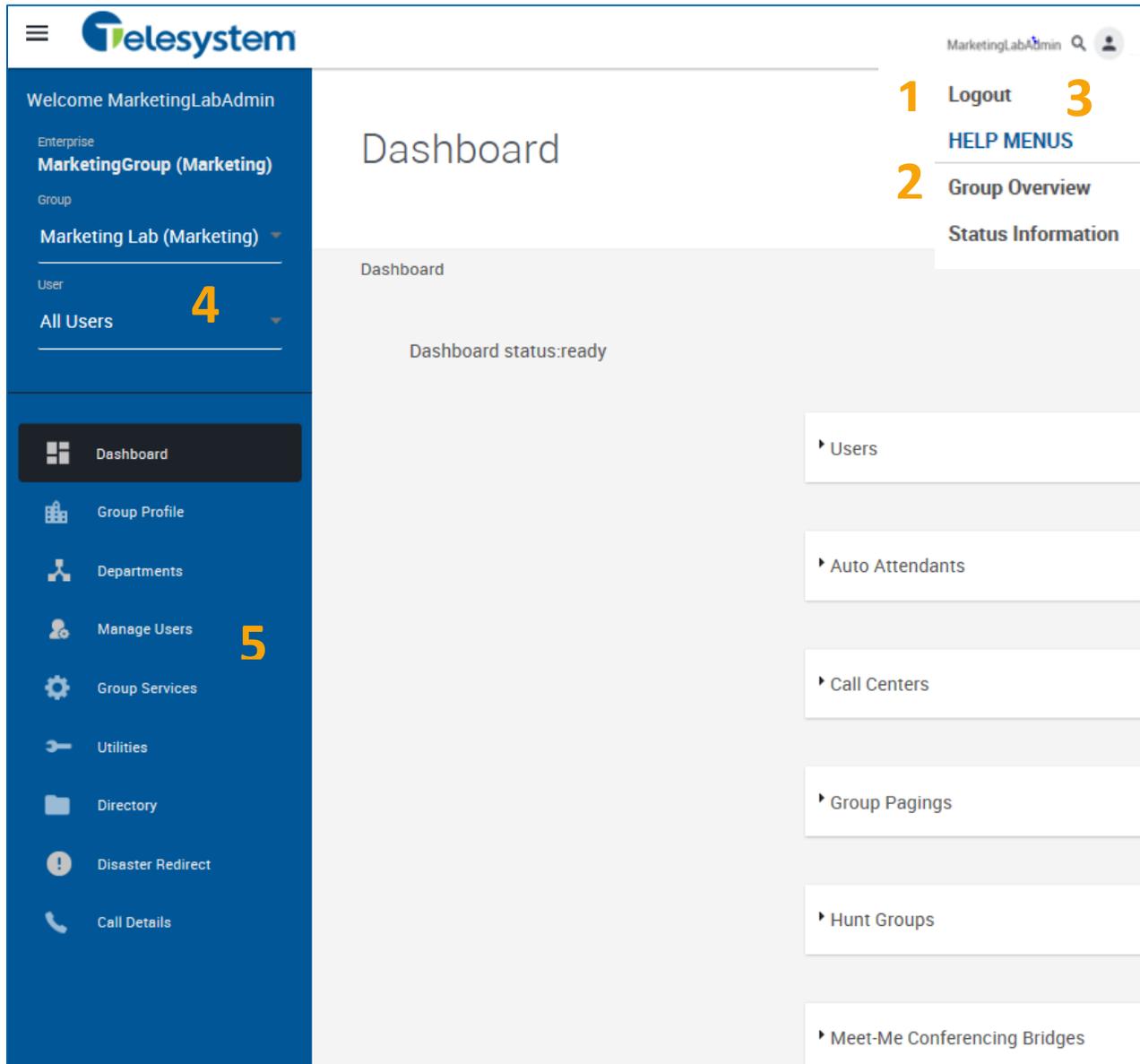
The screenshot shows a settings panel titled "Call Center External Reporting Settings". Under the heading "External Reporting:", there are two radio button options: "Off" (which is selected) and "Enhanced". Below these options is a blue rectangular button labeled "SAVE".

5 Hosted VoIP Phone System Admin Portal Interface (Group Administrators)

To configure settings for an individual Call Center, you must enter the Group Administration for that Call Center. An enterprise level administrator may use the drop-down navigation boxes located at the left side panel of the screen. Group level administrators will have separate login credentials.

Note: Group level administrators do not have the ability to access Enterprise settings previously covered in this document.

Once you have logged into the Group Admin Portal, you will be presented with the following interface:



1	Username/Logout	Shows the Logged In Username and the link to Logout . These will display statically as you navigate through the Hosted VoIP Phone System Admin Portal.
2	Help Menus	Help Menus indicates that there is a help page available for options that are displaying on the current page.
3	Search	Generates a menu to find a specific Group or User using search fields. Available fields for Group search include: Group Name and Group ID. Available fields for User search include: Phone Number, First Name, Last Name, User ID, Group ID, and Department.
4	Navigation Drop-down menus	These drop-down menus allow you to navigate from the Group directly to an individual user and vice versa.
5	Navigation Tabs and Menus	These tabs will allow you to navigate between the different sections available to you based on the navigation drop-down menu that has been selected. The tabs will change if you have selected user. Some tabs will also contain menu options and sub-menu options. Mousing over the menus will provide you with a pop-up list of sub-options.

6 Accessing Call Center Configurations (Group Admin)

Group Level Call Center Administration can be accessed through the Dashboard or through Group Services tab. Although these are two separate tabs that initially provide you with different settings up front, they will both ultimately provide you with access to the Call Center’s individual configuration.

6.1 Navigating to the Dashboard

Once you have entered the Group Level Administration Portal you will immediately be presented with the Dashboard tab. Scroll down on this tab to locate the section labeled Call Centers. This will display a list of all Call Centers configured in your Group.

Call Centers				
STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	Marketing CC 2	4199442077 (x2077)		
	Premium Call Center Test	(x9876)		

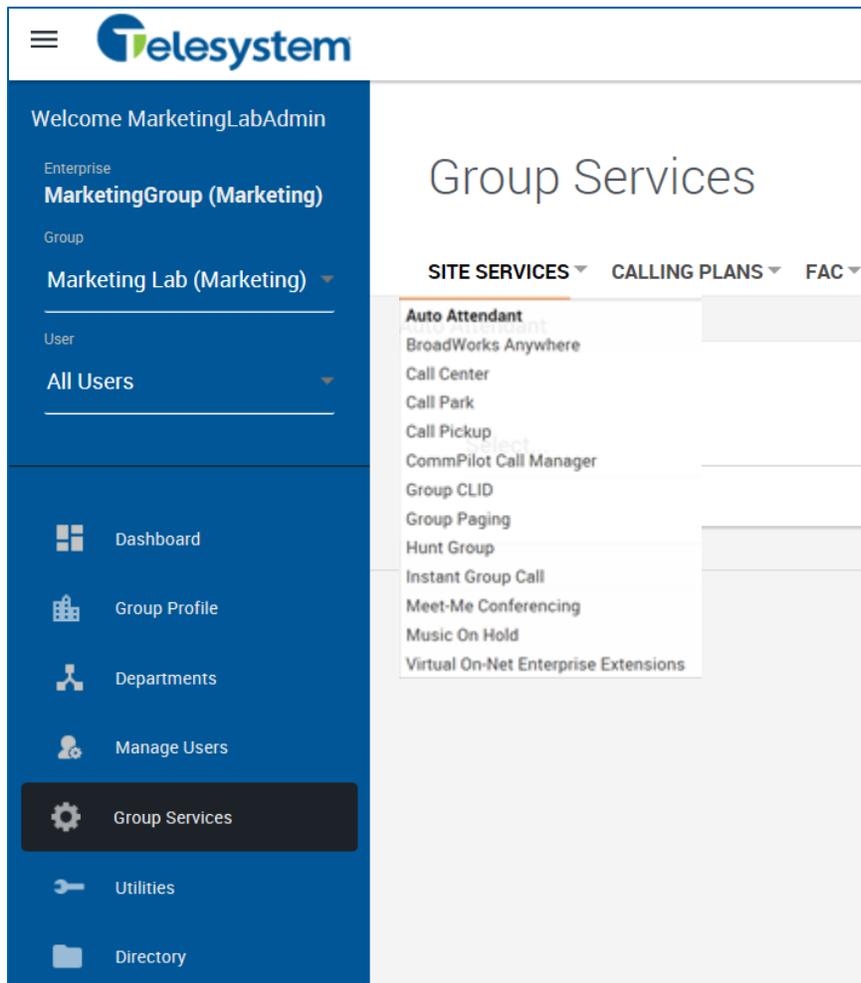
Displaying 2 of 2 users

Proceed to Section **7 Dashboard**, to read more about using the Dashboard to configure your Call Centers.

6.2 Navigating to the Group Services – Call Centers

Once you have entered the Group Level Administration Portal, click the **Group Services** tab. Depending on the services you have assigned to your Group you will be presented with **Site Service** settings. If you are not immediately presented with **Call Center** settings, click on the **Site Services** menu and choose **Call Center** from the drop-down menu.

Once you are viewing the Call Center settings, you will be provided with access to creating Agent Unavailable Codes, Disposition Codes, and Routing Policies for all Call Centers in your Group. Use the drop-down box to select a specific Call Center and access an individual Call Center’s settings.



Proceed to Section **8.1 Call Center** to read more about using the Group Services tab to configure your Call Centers.

7 Dashboard (Group Admin Interface)

The Dashboard is the first tab presented to you when you login to the Hosted VoIP Phone System Admin Portal for Group Administration. It contains the Users, Call Centers, Group Paging, Hunt Groups, and Meet-Me Conferencing modules. There are no additional menus available in the Dashboard.

7.1 Call Centers Module (Group Admin Dashboard)

The Call Centers module of the Dashboard will only be available if you have one or more Call Centers assigned to your group. The Call Centers module contains fields for: Status, Name, Number, Calls, and Settings.

7.1.1 Call Center Status

The Status field within the Dashboard provides phone registration information. The Call Center Status field does not perform any action because the Call Center is not tied to one specific telephone. Clicking on it will not produce any result.

Call Centers				
STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	Marketing CC 2	4199442077 (x2077)		

7.1.2 Call Center Name

The Name field will provide you with access for changing the Name of the Call Center as well as the Calling Line ID (CLID) appearance (First Name and Last Name) for calls generated from the Call Center. Note that changes made here will only affect calls made to other Hosted VoIP Phone System users. To make changes to off net calling parties please contact Buckeye Telesystem at 419-724-9898. To make changes, type the desired names into the appropriate fields, and then click the **Save** button to keep your changes. Click the **Cancel** button to discard your changes.

Name

Name:
Marketing CC 2

CLID First Name:
Marketing

CLID Last Name:
CC

7.1.3 Call Center Number

The Phone Number field displays the DID number and/or extension assigned to the particular Call Center. A Call Center with no phone number or extension assigned will show **(none)**. This field is not clickable and not will produce an action.

Call Centers				
STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	Marketing CC 2	4199442077 (x2077)		

7.1.4 Call Center Calls

The Calls tab will display the last three calls logged by the system for the Call Center. If there are no recent calls it will display **No Recent Calls**. The call information will display the following information:

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	Marketing CC 2	4199442077 (x2077)		
No Recent Calls				
VIEW CALL DETAILS				

Inbound or Outbound	Shows for inbound calls and for outbound calls.
#	Shows the other party's phone number or extension.
Date and Time	Displays the date and time of the call record.
Type	Displays inbound or outbound to indicate the type of call.

A link labeled **View Call Details** is available that will open a new browser tab or window and allow you to generate more detailed call detail reports and view more call detail records.

Call Centers															
STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS											
	Marketing CC 2	4199442077 (x2077)													
	<table border="1"> <thead> <tr> <th>#</th> <th>DATE AND TIME</th> <th>TYPE</th> </tr> </thead> <tbody> <tr> <td> +14197243718</td> <td>10/28 10:12AM</td> <td>inbound</td> </tr> <tr> <td> +14197243718</td> <td>10/28 9:19AM</td> <td>inbound</td> </tr> <tr> <td> +14197243718</td> <td>10/28 9:18AM</td> <td>inbound</td> </tr> </tbody> </table>	#	DATE AND TIME	TYPE	+14197243718	10/28 10:12AM	inbound	+14197243718	10/28 9:19AM	inbound	+14197243718	10/28 9:18AM	inbound		
#	DATE AND TIME	TYPE													
+14197243718	10/28 10:12AM	inbound													
+14197243718	10/28 9:19AM	inbound													
+14197243718	10/28 9:18AM	inbound													
VIEW CALL DETAILS															

7.1.5 Call Center Settings

The Call Center Settings tab provides you with immediate access to the Group Policy, Call Center Routing Policies, Agents, and Supervisors assigned to the Call Center.

▼ Call Centers

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	Marketing CC 2	4199442077 (x2077)		

Group Policy

Circular

Regular

Simultaneous

Uniform

Weighted Call Distribution [Edit]

Call Center Routing Policies

Overflow Action:

Enable overflow after calls wait: seconds

Perform busy treatment

Transfer to phone number:

Play ringing until caller hangs up

Agents

Available Users		Assigned Users
	<div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px;">ADD ></div> <div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px;">< REMOVE</div> <div style="background-color: #0070C0; color: white; padding: 5px; margin-bottom: 5px;">ADD ALL >></div> <div style="background-color: #0070C0; color: white; padding: 5px;"><< REMOVE ALL</div>	Michaels, Bridgette (4199442073) Smith, Jamie (4199442070) Dixon, Jay (4199442071) Stevens, Amy (4199442072) Snow, Jonathon (4199442074)
		<div style="background-color: #0070C0; color: white; padding: 5px; margin-right: 10px;">MOVE UP</div> <div style="background-color: #0070C0; color: white; padding: 5px;">MOVE DOWN</div>

Available Supervisors	Assigned Supervisors
Michaels, Bridgette (4199442073) Snow, Jonathon (4199442074) Stevens, Amy (4199442072)	Smith, Jamie (4199442070) Dixon, Jay (4199442071)
ADD >	
< REMOVE	
ADD ALL >>	
<< REMOVE ALL	
SAVE CANCEL	
DETAILED SETTINGS	

A link is also available in the lower, right-hand corner of the module to access **Detailed Settings** for the Call Center. Clicking on this link will open a new browser window or tab that will provide you with access advanced Call Center settings.

7.1.5.1 Call Center Group Policy for Call Routing

The following options are available for setting the Group Policy of a Call Center:

Circular	Incoming calls hunt through agents in the order they appear on the list, starting with the agent following the last agent to receive a call. When the search reaches the end of the list, it loops back to the top and continues until it has tried all users. After it has tried all agents a forward number must be setup in the No Answer field to route calls or calls will hear ringing followed by a message indicating “all circuits are busy”.
Regular	Incoming calls hunt through agents in the order they appear on the list, starting from the top each time.
Simultaneous	Incoming calls alert all agents at the same time. The first agent to answer handles the call.
Uniform	Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call.
Weighted Call Distribution	Incoming calls are assigned to idle agents based on percentages you assign on the Call Center’s Profile Weighted Call Distribution page. The percentages for all agents must add up to 100%. Selecting Weighted Call Distribution and then clicking on the Edit link here will open the Call Center Profile page.

Group Policy

Circular

Regular

Simultaneous

Uniform

Weighted Call Distribution [\[Edit\]](#)

7.1.5.2 Call Center Routing Policies

The Call Center Routing Policies are available for you to determine what action the Call Center should perform when a large number of calls have been received or calls have been waiting longer than a configured threshold.

Available options include:

Enable overflow after calls wait x seconds	By checking this box and setting the number of seconds, callers will wait in queue until an agent answers the call or the threshold is met. If the threshold is met, one of the overflow actions listed below are taken.
Perform busy treatment	Calls that are determined to be Overflow Calls will receive a busy signal.
Transfer to phone number	Selecting this option provides the option to enter a number into a text box where Overflow Calls will be forwarded to. This may be used to send callers to a backup Call Center or messaging system.
Play ringing until caller hangs up	Calls that are designated as Overflow Calls will receive constant ringing but the call will not be distributed to an agent.

The Call Center Details page provides you with options to play an announcement before overflow processing. A default announcement can be selected or a custom announcement may be uploaded and played to callers.

Call Center Routing Policies

Overflow Action:

Enable overflow after calls wait: 30 seconds

Perform busy treatment

Transfer to phone number:

Play ringing until caller hangs up

7.1.5.3 Call Center Agents

The Agents section will allow you to assign agents to the Call Center. It contains two lists. On the left, you will see any users in your group that have an Agent License assigned to them, on the right you will see agents that are currently assigned to the selected Call Center.

Agents

Available Users		Assigned Users
	<div style="margin-bottom: 5px; background-color: #0056b3; color: white; padding: 5px; text-align: center;">ADD ></div> <div style="margin-bottom: 5px; background-color: #0056b3; color: white; padding: 5px; text-align: center;">< REMOVE</div> <div style="margin-bottom: 5px; background-color: #0056b3; color: white; padding: 5px; text-align: center;">ADD ALL >></div> <div style="background-color: #0056b3; color: white; padding: 5px; text-align: center;"><< REMOVE ALL</div>	Michaels, Bridgette (4199442073) Smith, Jamie (4199442070) Dixon, Jay (4199442071) Stevens, Amy (4199442072) Snow, Jonathon (4199442074)
		<div style="display: inline-block; margin-right: 20px; background-color: #0056b3; color: white; padding: 5px 15px;">MOVE UP</div> <div style="background-color: #0056b3; color: white; padding: 5px 15px;">MOVE DOWN</div>

Add an agent to the Call Center by clicking on their name on the left in the **Available Users** box, and then clicking the **Add** button. This will move them to the **Assigned Users** box on the right. Remove agents by clicking on their name right in the **Assigned Users** box, and then clicking the **Remove** button. This will move them to the **Available Users** box on the left.

Add all **Available Users** by clicking on the **Add All** button. Any user that was listed in the **Available Users** box will now be in the Assigned Users box. Remove all agents from the Call Center by clicking on the **Remove All** button. All agents that were in the **Assigned Users** box will now be in the **Available Users** box.

7.1.5.4 Call Center Supervisors

The Supervisors section will allow you to assign supervisors to the Call Center. It contains two lists. On the left, you will see any users in your group that have a Supervisor License assigned to them, on the right you will see supervisors that are currently assigned to the selected Call Center.

Supervisors	
Available Supervisors Michaels, Bridgette (4199442073) Snow, Jonathon (4199442074) Stevens, Amy (4199442072)	Assigned Supervisors Smith, Jamie (4199442070) Dixon, Jay (4199442071)
ADD >	
< REMOVE	
ADD ALL >>	
<< REMOVE ALL	
SAVE CANCEL DETAILED SETTINGS	

Add a supervisor to the Call Center by clicking on their name on the left in the **Available Supervisors** box, and then clicking the **Add** button. This will move them to the **Assigned Supervisors** box on the right. Remove supervisors by clicking on their name in the **Assigned Supervisors** box, and then clicking the **Remove** button. This will move them to the **Available Supervisors** box on the left.

Add all **Available Supervisors** by clicking on the **Add All** button. Any supervisor that was listed in the **Available Supervisor** box will now be in the Assigned Supervisor box. Remove all supervisors from the Call Center by clicking on the **Remove All** button. All supervisors that were in the Assigned Supervisor box will now be in the **Available Supervisor** box.

Once a supervisor has been assigned to a Call Center, agents can be assigned from the user's personal profile page under the **Call Control** heading through the feature labeled **Call Center – Supervisor** using the **Edit** option.

8 Group Services (Group Admin)

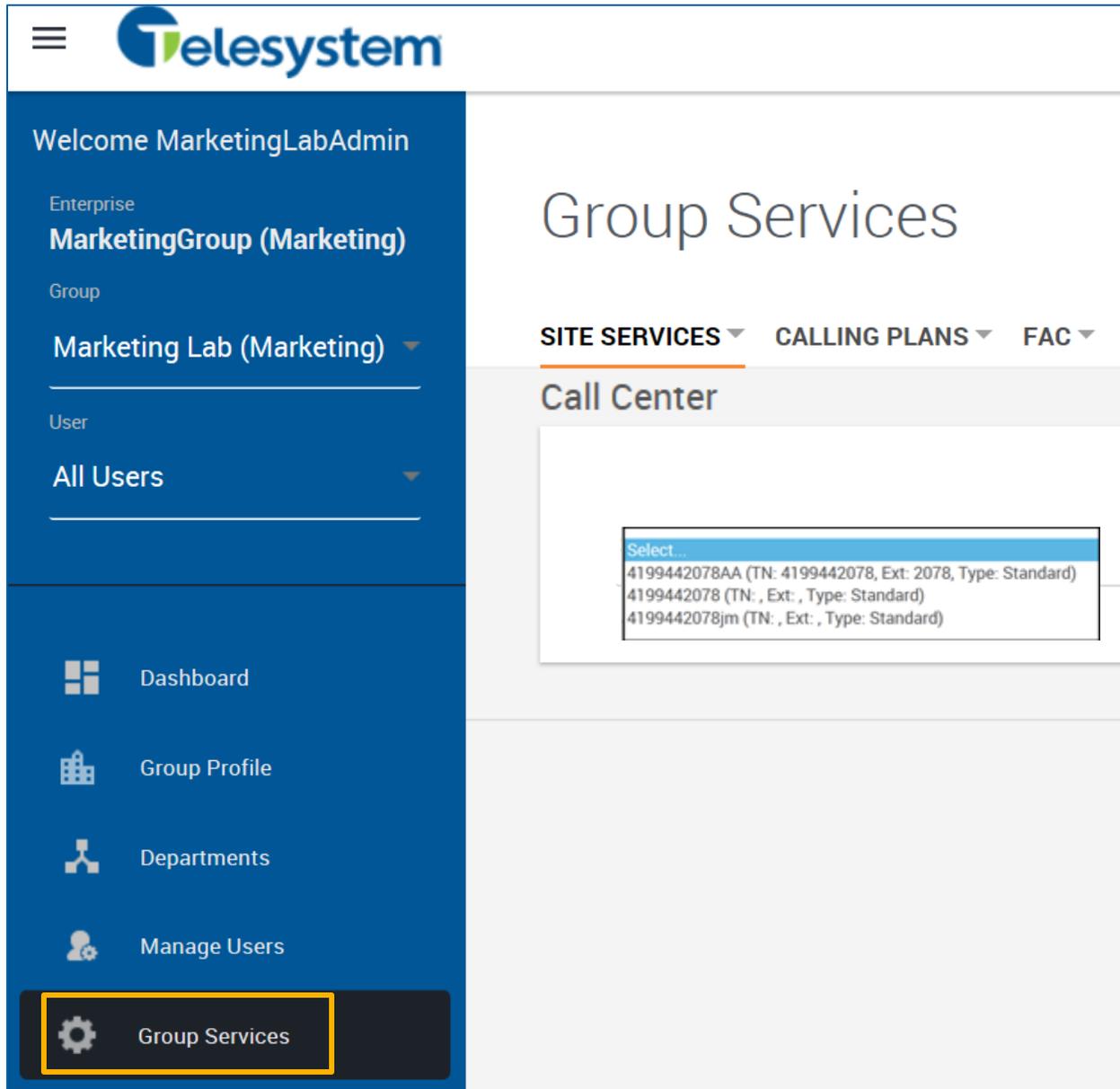
The Group Services tab contains the following menus:

- Site Services
 - Broadworks Anywhere
 - Call Center
 - Call Park
 - Call Pickup
 - CommPilot Call Manager
 - Group CLID
 - Group Paging
 - Hunt Group
 - Instant Call Group
 - Meet-Me Conferencing
 - Music On Hold
 - Virtual On Net Extensions
- Calling Plans
 - Calling Plans
 - Account/Auth Codes
- FAC (Feature Access Codes)

NOTE: The Site Services that display here will vary depending on the features and licenses assigned to your group.

8.1 Call Center

You can access Call Center from the **Site Services** menu on the **Group Services** tab. When you initially access Call Center you will be presented with a drop-down box with all of the Call Centers configured for your group available. Choose the Call Center you would like to view or edit from the drop-down box.



The page will refresh and you will be taken to the Call Center Profile page. From here you can navigate to the Profile, Calling Features, My Calls, Call Center Routing Policies, and Utilities tabs for the Call Center.

8.1.1 Call Center – Profile

The Call Center Profile page is broken down into the following sections:

- Profile Settings
- Bandwidth and QoS Settings
- Call Center Settings
- Agent Settings
- Agents
- Supervisors

It also has the following menu options available:

- Announcements
- Distinctive Ringing
- Call Center DNIS
- Queue Notifications
- Call Disposition Codes

8.1.1.1 Profile Settings

The Profile Settings section of the Call Center Profile tab provides the following information:

Call Center ID	This is the identifier for the Call Center configured by an Administrator.
Phone Number	This is the phone number for the Call Center.
Call Center Type	This will display if you have a Standard or Premium Call Center. This will be important as some features are only available in Premium Call Centers.
Name	This is the name of the Call Center.
Calling Line ID	These fields can be set so that calls made through the Call Center’s GUI are labeled with the Last Name and First Name set here for the called line’s caller ID information.
Department	This drop-down box allows you to select a specific department that this Call Center may be assigned to.
Language	Sets the default language for the Call Center.
Time Zone	Sets the default time zone for the Call Center.
Group Policy	Options for Circular, Regular, Simultaneous, Uniform, and Weighted Call Distribution. For more information about the available policies see Section 7.1.5.2 Call Center Routing Policies.
Statistics	Click on the Edit button to gain access to the Statistics pop-up. From here you can manage reporting information such as the Statistic Source, Reporting Period, and E-mail address (es) where the report will be sent.

Profile

ANNOUNCEMENTS DISTINCTIVE RINGING CALL CENTER DNIS QUEUE NOTIFICATIONS CALL DISPOSITION CODES

Profile

SAVE

* indicates required field.

Profile Settings

CHANGE PASSWORD

Call Center ID: 4199442077CC	Phone Number: 4199442077
Call Center Type: Premium	Extension: 2077

* Name:
Marketing CC 2

Calling Line ID

* Last Name: CC	* First Name: Marketing
Department: None	
Language: English	Time Zone: ▼ (GMT-04:00) (US) Eastern Time

Group Policy:

Circular
 Regular
 Simultaneous
 Uniform
 Weighted Call Distribution

EDIT

Statistics:

EDIT

The Call Routing Policies are available in section **7.1.5.2 Call Center Routing Policies**.

8.1.1.2 Bandwidth and QoS Settings

The Bandwidth and QoS (Quality of Service) settings allow you to choose the preferred announcement/music codec for external and internal calls.

The options for these settings are:

- None
- G711
- G726
- G729
- AMR

8.1.1.3 Call Center Settings

The Call Center Settings section of the Call Center Profile allows you to determine the following options:

Queue Length	Set the maximum number of calls that can be in the Call Center’s queue. Any calls after this will be considered overflow calls (Section Error! Reference source not found. Error! Reference source not found.).
Play ringing when offering call	Set this option if you want your callers to hear ringing when the call is presented to a Call Center agent.
Enable Call Center External Reporting	Enable this option to allow for group administrators to access reports using the Hosted VoIP Phone System Admin Portal without accessing the Call Center GUI.
All callers to dial x to escape out of queue	Enable this option to allow for callers who are waiting in queue to dial a specified digit to have their call redirected (different phone number or voicemail). Additional features are required for this option to work.
Reset caller statistics upon entry to queue	Enabling this option will treat all calls into the Call Center as a “new” call. If this option is disabled, then a call that was active in a different Call Center will carry with it the active call handle statistics which will automatically promote it higher in the queue to decrease that caller’s wait times. This may also cause callers who were already in the queue to be repositioned.

Call Center Settings

Queue Length: 5 calls

Play ringing when offering call

Enable Call Center External Reporting

Allow callers to dial 0 to escape out of queue

Reset caller statistics upon entry to queue

8.1.1.4 Agent Settings

From the Agent Settings section you may enable or disable the following options:

Allow agents to join Call Centers	Enabling this option will allow an agent to join or remove themselves from receiving calls from a Call Center via their agent portal settings.
Allow Call Waiting on agents	Enabling this option will allow an agent who has the Call Waiting feature assigned and activated to receive calls distributed by the Call Center while they are already on a call.
Enable calls to agents in wrap-up state	Enabling this option will allow the Call Center to distribute calls to agents while their ACD state is set to wrap-up if no other agents are available.
Enable maximum ACD wrap-up timer x seconds	Enabling this option allows you to configure the maximum amount of time an agent may have their ACD state set to wrap-up. Once the time expires the agent’s ACD state is automatically set to Available .
Automatically set agent state to _____ after call	Enabling this option allows you to configure the default agent state immediately after a call. The agent can manually update their ACD state after this is set.
Automatically answer calls after waiting x seconds	Enabling this option allows you to configure an auto answer for your agents. This is only recommended if your agents wear headsets. Without a headset this may put the caller on speakerphone.

8.1.1.5 Agents

The Agents section will allow you to assign agents to the Call Center. It contains two lists and a **Search** field. On the left, you will see any users in your group that have an Agent License assigned to them, on the right you will see agents that are currently assigned to the selected Call Center. You can also use the Search field to locate a specific user with an agent license assigned to them. To search, set the department field and search by Last Name and/or First Name and click the **Search** button.

Group ID: All Groups	Department: Any	
Last Name:	First Name:	SEARCH

Agents	
Available Users	Assigned Users
	Michaels, Bridgette (4199442073) Smith, Jamie (4199442070) Dixon, Jay (4199442071) Stevens, Amy (4199442072) Snow, Jonathon (4199442074)
	<div style="text-align: center;"> ADD > < REMOVE ADD ALL >> << REMOVE ALL </div>
	<div style="text-align: right;"> MOVE UP MOVE DOWN </div>

Add an agent to the Call Center by clicking on their name on the left in the **Available Users** box, and then clicking the **Add** button. This will move them to the **Assigned Users** box on the right. Remove agents by clicking on their name right in the **Assigned Users** box, and then clicking the **Remove** button. This will move them to the **Available Users** box on the left.

Add all Available Users by clicking on the **Add All** button. Any user that was listed in the Available Users box will now be in the **Assigned Users** box. Remove all agents from the Call Center by clicking on the **Remove All** button. All agents that were in the **Assigned Users** box will now be in the **Available Users** box.

The **Assigned Users** box will dictate how calls are routed to agents for some **Group Policies**. Modify the list using the **Move Up** and **Move Down** buttons below the **Assigned Users** box to determine where agents will be in the list for call routing.

Assigned Users

Michaels, Bridgette (4199442073)
Smith, Jamie (4199442070)
Dixon, Jay (4199442071)
Stevens, Amy (4199442072)
Snow, Jonathon (4199442074)

MOVE UP **MOVE DOWN**

8.1.1.6 Call Center Supervisors

The Supervisors section will allow you to assign supervisors to the Call Center. It contains two lists and a search field. On the left, you will see any users in your group that have a Supervisor License assigned to them, on the right you will see supervisors that are currently assigned to the selected Call Center. You can also use the Search field to locate a specific user with an agent license assigned to them. To search, set the department field and search by Last Name and/or First Name and click the **Search** button.

Supervisors

Group ID:
All Groups

Department:
Any

Last Name:

First Name:

SEARCH

Supervisors

Available Supervisors

Michaels, Bridgette (4199442073)

Snow, Jonathon (4199442074)

Stevens, Amy (4199442072)

ADD >

< REMOVE

ADD ALL >>

<< REMOVE ALL

Assigned Supervisors

Smith, Jamie (4199442070)

Dixon, Jay (4199442071)

SAVE

CANCEL

DETAILED SETTINGS

Add a supervisor to the Call Center by clicking on their name on the left in the **Available Supervisors** box, and then clicking the **Add** button. This will move them to the **Assigned Supervisors** box on the right. Remove supervisors by clicking on their name right in the **Assigned Supervisors** box, and then clicking the **Remove** button. This will move them to the **Available Supervisors** box on the left.

Add all Available Supervisors by clicking on the **Add All** button. Any supervisor that was listed in the **Available Supervisor** box will now be in the **Assigned Supervisor** box. Remove all supervisors from the

Call Center by clicking on **the Remove All** button. All supervisors that were in the **Assigned Supervisor** box will now be in the **Available Supervisor** box.

Once a supervisor has been assigned to a Call Center, agents can be assigned from the user’s personal profile page under the **Call Control** heading through the feature labeled **Call Center – Supervisor** using the **Edit** option. For detailed information see section Error! Reference source not found. Error! Reference source not found..

NOTE: A supervisor can be assigned as an agent as well if you want the Call Center to also distribute calls to the supervisor as an agent. The supervisor will still have the Supervisor GUI when they log into the Call Center and continue to be able to receive escalations.

8.1.1.7 Call Center Call Policies

This section is used to modify the Call Policies for the Call Center.

The **Connected Line Identification Privacy on Redirected Calls** option applies to redirections before and after answer including Call Forwarding, Blind Transfer, Transfer with Consultation, Sequential Ring, and Simultaneous Ring. This option does not apply to services that are not considered redirections such as Automatic Hold/Retrieve, Call Pickup, Call Park, Directed Call Pickup, Directed Call Pickup with Barge-in, all types of Recalls, and so on.

For **Connected Line Identification Privacy on Redirected Calls**, select one of the following options:

No Privacy	When this option is selected, the redirecting party allows the Connected Line Identification Presentation (COLP) of the redirect destination to be sent to the remote party.
Privacy for External Calls	When this option is selected, the redirecting party allows the COLP of the redirect destination to be sent to the remote party only when the remote party is in the same Group as the redirecting party. If the remote party is not in the same Group as the redirecting party (viewed as a Network subscriber), then the COLP sent to the remote party is the COLP of the redirecting party, not the COLP of the redirect destination.
Privacy for All Calls	When this option is selected the redirecting party never allows the COLP of the redirect destination to be sent to the remote party. The COLP sent to the remote party is always the COLP of the redirecting party, not the COLP of the redirect destination.

For the **Send Call Being Forwarded Response on Redirected Calls** setting, select one of the following options:

Never	When this option is selected and the Application Server redirects a call, the Application Server does not generate a 181 response.
Internal Calls	When this option is selected and the originating user is the same group or enterprise as the redirecting user, the Application Server proxies or generates a 181 response.
All Calls	If the user redirects a call, a 181 response is proxied or generated.
NOTE: 181 Responses received from network users are proxied, regardless of the setting for the user, if the Application Server is configured to do so at the system level.	

To save changes to the settings you have modified, click on the **Save** button in the bottom, left corner.

Call Policies

View or modify Call Policies for the User

Connected Line Identification Privacy on Redirected Calls:

No Privacy

Privacy For External Calls

Privacy For All Calls

Send Call Being Forwarded Response on Redirected Calls:

Never

Internal Calls

All Calls

SAVE

8.1.2 Call Center Profile Announcements

You use this menu to customize the Call Center **Entrance**, **Estimated Wait Message**, **Comfort**, **Music On Hold**, and **Call Whisper** messages. Navigate between the different available Announcement Messages using the drop-down box.

8.1.2.1 Entrance Message

The **Entrance** message is the message that plays to callers waiting in a queue you can configure up to four files/URLs for the entrance message. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Indicate if the entrance message plays to queued callers.	Check or uncheck Play entrance message .
2. Specify if the entrance message is mandatory.	Check or uncheck Entrance message is mandatory when played . The entrance message plays to completion prior to routing the call. The call cannot be transferred or re-ordered while the mandatory entrance message is played.
3. Specify the audio files to be used in the message	For the Audio files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter up to four URL addresses • Custom and then select up to four custom files Click Browse next to each entry and then find and select the files. Click Clear next to an entry to clear the corresponding text box. This only clears the display and does not save changes.
4. Save your changes or exit without saving.	To save your changes, click Save

Announcements

Entrance ▾

Play entrance message

Entrance message is mandatory when played

Audio:

Default

URL

Custom

File 1:

Browse...

UPLOAD

File 2:

Browse...

UPLOAD

File 3:

Browse...

UPLOAD

File 4:

Browse...

UPLOAD

SAVE

8.1.2.2 Estimated Wait Message

You use these settings to customize the estimated wait message that plays to callers waiting in a Call Center queue. The message provides callers either with the approximate waiting time or with their position in the queue. When the waiting time or queue position of the caller exceeds the configured maximum, you may choose to play the following message to the caller: **“We are experiencing a high volume of calls. Please hold.”**

Steps	Details
1. Enable or disable estimated wait message.	Check or uncheck Enable estimated wait message for queued calls .
2. Select and configure the message option you want to use for this Call Center.	<ul style="list-style-type: none"> • To announce updated wait times to callers at specified intervals, check the Play updated wait message every [X] seconds option and enter the desired interval (in seconds) in the box. • To announce their position in the queue to callers, check Announce Queue position and in the Play message for callers in queue position [X] or lower text box, enter the maximum queue position to play this announcement to. The number must be from one through 100. <ul style="list-style-type: none"> ○ To play the high volume announce to caller whose position in the queue is higher than the configured maximum, check Play high volume message. • To announce their approximate waiting time to callers, check the Announce wait time and in the Play message for callers with wait time of [X] minutes or lower text box, enter the maximum waiting time (in minutes) during which the message can play. The number must be from one through 100. <ul style="list-style-type: none"> ○ To play the high volume message to callers whose estimated waiting time is longer than the configured maximum, check Play high volume message. ○ In the Default handling time text box, enter the estimated handling time per-call (in minutes) to use when calculating the waiting time. <p>NOTE: The estimated waiting time = ([position in queue * average call handling time]/number of agents available or wrap-up)). The default handling time is used when the average call handling time is not available.</p>
3. Save your changes or exit without saving.	To save your changes, click the Save button.

Announcements

Estimated Wait ▾

Enable estimated wait message for queued calls

Play updated wait message every 60 seconds

Announce queue position

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

Play high volume message

Announce wait time

* Play message for callers with a wait time of: 100 Minute(s) or lower.

Play high volume message

* Default handling time: 5 minutes per call

SAVE

8.1.2.3 Comfort Message

Use this setting to customize the Call Center comfort message that plays to callers waiting in the queue. You may configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Indicate if the comfort message plays to users.	Check or uncheck Play comfort message .
2. Specify the time between messages.	In the Time Between Messages: [X] seconds , enter the time to elapse before replaying the comfort message.
3. Specify the audio files to play in the message	For the Audio files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter up to four URL addresses. • Custom and then select up to four custom files. <ul style="list-style-type: none"> ○ Click Browse next to each entry and then find and select the files. ○ Click Upload
4. Save your changes or exit without saving.	To save your changes, click Save .

Announcements

Comfort ▼

Play comfort message

Time Between Messages: 90 seconds

Audio:

Default

1: _____

2: _____

URL

3: _____

4: _____

Custom

8.1.2.4 Music On Hold

Use these settings to customize the Call Center **Music On Hold** message that plays to callers waiting in the queue. You can configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another. You may also specify a different message to be played to internal callers.

Announcements

Music On Hold ▾

Enable music on hold for queued calls

Audio:

Default

URL

Custom

External Source

SAVE

Steps	Details
1. Indicate if the music or video plays to callers.	Check or uncheck Enable music on hold for queued calls .
2. Specify the audio and video files to play in the message	For the Audio files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter up to four URL addresses. • Custom and then select up to four custom files. <ul style="list-style-type: none"> ○ Click Browse next to each entry and then find and select the files. Click Upload • External Source
3. Save your changes or exit without saving.	To save your changes, click Save .

8.1.2.5 Call Whisper Message

Use this setting to customize the Call Center whisper message that plays to agents answering a call while the caller receives ringing. The message typically tells the agent from which Call Center the call is coming (which is especially important when using Dialed Number Identification Service [DNIS] numbers). The caller continues to hear the Call Center treatment (such as ringing or a message) while the whisper message plays to the agent.

You may configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Indicate if the whisper message plays to agents	Check or uncheck Play call whisper message .
2. Specify the audio or video files to play in the message.	For the Audio or Video files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter up to four URL addresses • Custom and then select up to four custom files <ul style="list-style-type: none"> ○ Click Browse next to each entry and then find and select the files. ○ Click Upload
3. Save your changes or exit without saving.	To save your changes, click the Save button.

Announcements

Call Whisper ▾

Play call whisper message

Audio:

Default

URL

Custom

File 1:

File 2:

File 3:

File 4:

8.1.3 Call Center Profile Distinctive Ringing

The Distinctive Ringing menu allows you to configure distinctive ringing policies for calls routed to agents in the specific Call Center.

Steps	Details
1. Enable or disable distinctive ringing.	Check Enable distinctive ringing for Call Center calls to enable distinctive ringing when calls in this Call Center are offered to agents; or leave unchecked to disable distinctive ringing for this Call Center.
2. Specify the ring pattern for regular calls delivered to agents.	From the Ring Pattern drop-down list, select the ring pattern.
3. Specify the ring pattern for calls for-delivered to agents (Call Center – Premium)	From the Ring Pattern for forced delivered Call Center calls drop-down list, select the ring pattern.
4. Save your changes or exit without saving.	To save your changes, click Save .

Profile

ANNOUNCEMENTS
DISTINCTIVE RINGING
CALL CENTER DNIS
QUEUE NOTIFICATIONS
CALL DISPOSITION CODES

Distinctive Ringing

Enable distinctive ringing for call center calls

Ring Pattern: Short-Short-Long ▼

Ring Pattern for forced delivered call center calls: Short-Long-Short ▼

SAVE

8.1.4 Call Center Dialed Number Identification Service (DNIS)

Use this menu to view and manage the Dialed Number Identification Service (DNIS) telephone numbers configured for the Call Center. The Call Center primary phone number is treated as the Call Center's primary DNIS and listed on this page, but cannot be added or removed. The primary DNIS is indicated with **(Primary)** next to the name.

Call Center DNIS

DNIS Display settings:

Display DNIS Number to agent when presenting call instead of Calling Number

Display DNIS Name to agent when presenting call instead of Calling Name

DNIS Priority settings:

Automatically promote calls with Priority 1 to Priority 0 after waiting seconds

Automatically promote calls with Priority 2 to Priority 1 after waiting seconds

Automatically promote calls with Priority 3 to Priority 2 after waiting seconds

SAVE

Edit DNIS:

Select... DELETE

Tasks	Steps
<p>To configure queue-level DNIS settings (display and priority) for the Call Center:</p>	<ol style="list-style-type: none"> For DNS Display settings: If you want the Call Center DNIS number and DNIS name to display to agent device instead of the Call Center Calling Number and Calling Name, check: <ul style="list-style-type: none"> Display DNIS Number to agent when presenting call instead of Calling Number Display DNIS Name to agent when presenting call instead of Calling Name For DNS Priority settings: To prevent lower priority calls from being stranded, allow lower priority calls waiting in the queue longer than the specified amount of time to be promoted to the next higher priority. <ul style="list-style-type: none"> Check Automatically promote calls with priority 1 to priority 0 after waiting [x] seconds and specify the waiting time in seconds. Check Automatically promote calls with priority 2 to priority 1 after waiting [x] seconds and specify the waiting

	<p>time in seconds.</p> <ul style="list-style-type: none"> Check Automatically promote calls with priority 3 to priority 2 after waiting [x] seconds and specify the waiting time in seconds. For example, if you check Automatically promote calls with priority 3 to priority 2 after waiting [x] seconds and set X to “600”, calls with priority “3” waiting in the queue longer than 10 minutes are promoted to priority “2”.
	3. Click Save .
To assign a DNIS to the Call Center:	Select Add New... from the drop-down menu. See “Add Dialed Number Identification Service” below.
To view, modify, or delete a DNIS:	Select a DNIS from the drop-down menu, and settings for that entry will load.

8.1.4.1 Adding a DNIS

This section allows you to assign a DNIS telephone number to the Call Center using the drop-down box below the **Edit DNIS** header, choose **Add New...** then complete the following tasks and steps:

Steps	Details
1. Enter the DNIS Name	<p>In the DNIS Name box, enter the name for this DNIS number; for example, “Technical Support” or “Reception”.</p> <p>This is the name that displays to agents when presenting calls to them if the option to display the DNIS instead of the calling number is enabled for the Call Center. This is a required field.</p>
2. Select the phone number.	From the Phone Number drop-down list, select the number to assign to this DNIS.
3. Assign the priority to assign to calls received on this DNIS.	<p>From the Priority drop-down list, select the priority for this DNIS number. “0” represents the highest priority.</p> <p>This priority is attached to incoming calls received on this DNIS number, and calls are distributed to agents based on their priority.</p>
4. Configure the DNIS Calling Line ID attributes.	<ul style="list-style-type: none"> In the Calling Line ID box, enter the Calling Line ID (CLID) for the DNIS. To use a custom name for the DNIS Calling Line ID, check Use custom Calling Line name settings and enter the custom calling line first and last name in the Calling Line ID Last name and Calling Line ID First Name boxes. <ul style="list-style-type: none"> The Use custom Calling Line name settings option determines whether the DNIS level CLID values override the Call Center level CLID name values. If the option is enabled, the DNIS Calling Line ID Last Name and the DNIS Calling Line ID First Name are used for all outgoing calls. If the option is disabled, the Call Center’s CLID last and first name are used instead.

NOTE: The DNIS Calling Line ID attributes are read-only for administrators who have the Calling Line ID Access set to read-only at the administrator or group level.

- | | |
|---|---|
| <p>5. Specify whether to use custom announcements for this DNIS.</p> | <p>To use custom announcement settings, check Use Custom DNIS announcement settings.</p> |
| <p>6. Specify whether outgoing calls are allowed using this DNIS.</p> | <p>To allow outgoing calls using this DNIS number, check Allow outgoing Call Center call.</p> |
| <p>7. Save your changes.</p> | <p>Click Save.</p> |
| <p>8. Configure custom announcements settings.</p> | <p>Select the announcement to change from the drop-down menu.

See “DNIS Announcements” below.</p> |

Add New... ▼
DELETE

DNIS Configure

VIEW AGENT USAGE

DNIS Name:

Phone Number: ▼

Extension:

Priority: ▼

Calling Line ID:

Use custom Calling Line name settings

Calling Line ID Last Name:

Calling Line ID First Name:

Use custom DNIS announcement settings

Allow outgoing call center call

SAVE

8.1.4.2 DNIS Announcements

Use this section to customize the messages that play to callers for calls received on this Dialed Number Identification Service (DNIS) phone number and agents staffed in the queue. When custom announcements are enabled for the DNIS, these messages play to callers instead of the Call Center message.

Message options include **Entrance**, **Estimated Wait**, **Comfort**, **Music on Hold**, and **Call Whisper**. The options can be selected from the drop-down menu to load and configure additional settings.

You can configure up to four files/URLs for the DNIS message. All four announcements are chained and play back to the caller one after another.

8.1.4.2.1 DNIS Entrance Message

The Entrance message is the message that plays to callers when they initially call into the queue for calls received on this DNIS phone number. When custom announcements are enabled for the DNIS, this message plays to callers instead of the Call Center message.

You can configure up to four files/URLs for the entrance message. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Specify if the entrance message plays to the queued callers	Check or uncheck Play entrance message .
2. Specify if the entrance message is mandatory.	Check or uncheck Entrance message is mandatory when played . The entrance message plays to completion prior to routing the call. The call cannot be transferred or re-ordered while the mandatory entrance message is played.
3. Specify the audio and video files to be used in the message	For the Audio or Video files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter up to four URL addresses • Custom and then select up to four custom files Click Browse next to each entry and then find and select the files. Click Upload
4. Save your changes or exit without saving.	To save your changes, click Save

Announcements

Entrance ▾

Play entrance message

Entrance message is mandatory when played

Audio:

Default

URL

File 1:

File 2:

Custom

File 3:

File 4:

8.1.4.2.2 DNIS Estimated Wait Message

Use these settings to customize the estimated wait message that plays to callers waiting in a Call Center queue for calls received on this DNIS phone number. When custom announcements are enabled for the DNIS, this message plays to callers instead of the Call Center message.

The message provides callers either with the approximate waiting time or with their position in the queue. When the waiting time or queue position of the caller exceeds the configured maximum, you can choose to play the following message to the caller: **“We are experiencing a high volume of calls. Please hold.”**

Steps	Details
1. Enable or disable estimated wait message.	Check or uncheck Enable estimated wait message for queued calls .
2. Select and configure the message option you want to use for this Call Center.	<ul style="list-style-type: none"> • To announce updated wait times to callers at specified intervals, check the Play updated wait message every [X] seconds option and enter the desired interval (in seconds) in the box. • To announce their position in the queue to callers, check Announce Queue position and in the Play message for callers in queue position [X] or lower text box, enter the maximum queue position to play this announcement to. The number must be from one through 100. <ul style="list-style-type: none"> ○ To play the high volume announce to caller whose position in the queue is higher than the configured maximum, check Play high volume message.

- To announce their approximate waiting time to callers, check the **Announce wait time** and in the **Play message for callers with wait time of [X] minutes or lower** text box, enter the maximum waiting time (in minutes) during which the message can play. The number must be from one through 100.
 - To play the high volume message to callers whose estimated waiting time is longer than the configured maximum, check **Play high volume message**.
 - In the **Default handling time** text box, enter the estimated handling time per-call (in minutes) to use when calculating the waiting time.

NOTE: The estimated waiting time = ([position in queue * average call handling time]/number of agents available or wrap-up)). The default handling time is used when the average call handling time is not available.

3. Save your changes or exit without saving. To save your changes, click the **Save** button.

Announcements

Estimated Wait ▾

Enable estimated wait message for queued calls

Play updated wait message every seconds

Announce queue position

* Play message for callers in queue position: or lower

Play high volume message

Announce wait time

* Play message for callers with a wait time of: Minute(s) or lower.

Play high volume message

* Default handling time: minutes per call

8.1.4.2.3 DNIS Comfort Message

Use this setting to customize the Call Center comfort message that plays to callers waiting in the queue, for calls received on this DNIS phone number. When custom announcements are enabled for the DNIS, this message is played to callers instead of the Call Center message.

You can configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another.

Announcements

Comfort ▼

Play comfort message

Time Between Messages: 10 seconds

Audio:

Default

1: _____

2: _____

URL

3: _____

4: _____

Custom

SAVE

Steps	Details
1. Indicate if the comfort message plays to users.	Check or uncheck Play comfort message .
2. Specify the time between messages.	In the Time Between Messages: [X] seconds , enter the time to elapse before replaying the comfort message.
3. Specify the audio files to play in the message	For the Audio or Video files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter up to four URL addresses. • Custom and then select up to four custom files. <ul style="list-style-type: none"> ○ Click Browse next to each entry and then find and select the files. ○ Click Upload.
4. Save your changes or exit without saving.	To save your changes, click Save .

8.1.4.2.4 DNIS Music On Hold Message

Use these settings to customize the Call Center Music On Hold message that plays to callers when an agent has placed the caller on hold for calls received on this DNIS phone number. When custom announcements are enabled for the DNIS, this message plays to callers instead of the Call Center message.

You can configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another. You can also specify a different message to be played to internal callers.

Announcements

Music On Hold ▾

Enable music on hold for queued calls

Audio:

Default

URL

Custom

External Source

SAVE

Steps	Details
1. Indicate if the music or video plays to callers.	Check or uncheck Enable music on hold for queued calls .
2. Specify the audio and video files to play in the message	For the Audio files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter up to four URL addresses. • Custom and then select up to four custom files. <ul style="list-style-type: none"> ○ Click Browse next to each entry and then find and select the files. ○ Click Clear next to an entry to clear the corresponding text box. This only clears the display and does not save changes. • External Source
3. Specify the alternate source for internal messages.	To play a different message to internal callers, check Use Alternate Source for Internal Calls and specify the Audio or Video files to play for internal calls. Select from the following: <ul style="list-style-type: none"> • Default • URL and then enter up to four URL addresses. • Custom and then select up to four custom files. <ul style="list-style-type: none"> ○ Click Browse next to each entry and then find and select the files. ○ Click Upload. • External Source
4. Save your changes or exit without saving.	To save your changes, click Save .

8.1.4.2.5 DNIS Call Whisper Message

Use this setting to customize the Call Whisper message that plays to agents for calls received from this DNIS phone number. When custom announcements are enabled for the DNIS, this message plays to agents answering a call from the DNIS instead of the Call Center whisper message.

The message typically tells the agent from which Call Center the call is coming (which is especially important when using Dialed Number Identification Service [DNIS] numbers). The caller continues to hear the Call Center treatment (such as ringing or a message) while the whisper message plays to the agent.

You can configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Indicate if the whisper message plays to agents	Check or uncheck Play call whisper message .
2. Specify the audio or video files to play in the message.	For the Audio or Video files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter up to four URL addresses • Custom and then select up to four custom files <ul style="list-style-type: none"> ○ Click Browse next to each entry and then find and select the files. ○ Click Upload.
3. Save your changes or exit without saving.	To save your changes, click the Save button.

Announcements

Call Whisper ▾

Play call whisper message

Audio:

Default

URL

Custom

File 1:

File 2:

File 3:

File 4:

8.1.5 Call Center Profile Queue Notifications

The Queue Status Notification feature provides a mechanism for sending the Call Center status to the Dashboard in the Call Center GUI. This allows users to get a visual indicator of the Call Center status and modify their call handling behavior appropriately. Use this menu to configure queue status notification settings.

Steps	Details
1. Enable status notification.	Check Enable notification of queue status to agent device to activate the feature.
2. Configure notification thresholds.	<ul style="list-style-type: none"> If you want a notification sent to agents when a queue exceeds a specified number of calls, check Number of calls in queue and enter the number of calls. If you want a notification sent to agents when the call waiting time for a queue exceeds a specified number of seconds, check Longest waiting time and enter the time in seconds.
3. Save your changes or exit without saving.	Click Save .

8.1.6 Call Center Call Disposition Codes

Disposition Codes are additional attributes that agents can apply to calls. This allows agents to tag calls for marketing promotions, topics, and so on. Call Disposition Codes can be created at either the Enterprise level or Group Call Center level.

You use this page to view the Call Disposition Codes for the selected Call Center, including Enterprise-level disposition codes, activate or deactivate Call Center-level disposition codes, and specify default behavior for using disposition codes in the selected Call Center. From this menu, you can also access pages to:

- Create disposition codes for the selected Call Center
- Modify or delete Call Center-level disposition codes

Tasks	Steps
To set Call Center disposition calls defaults:	<ol style="list-style-type: none"> 1. To enable the use of disposition codes, check the Enable call disposition codes box. 2. To use enterprise-level disposition codes in this Call Center, check Use enterprise codes in addition to Call Center codes. 3. To force the use of disposition codes, check the Force use of call disposition codes with Default code and select the code to use from the drop-down list. 4. To save your changes, click Save.
To activate or deactivate a Call Center disposition code:	<ol style="list-style-type: none"> 1. Select a column to edit. 2. Click Edit. 3. Check or uncheck the Active box. <p>NOTE: Enterprise-level disposition codes are activated by enterprise administrators.</p>
To look for specific disposition codes:	Enter the search criteria and click Find .
To create a disposition code for the Call Center:	Click Add . Enter a code and description and click Add .
To modify or delete a Call Center disposition code:	<ol style="list-style-type: none"> 1. Select an entry you want to edit and click Edit. 2. Check the boxes beside the entries to delete, and click Delete. <p>NOTE: Enterprise-level disposition codes are managed by enterprise administrators.</p>

Call Disposition Codes

✕ 🔍

<input type="checkbox"/>	Code ↑	Is Active	Description	Level
<input type="checkbox"/>	1	Y	Billing	Enterprise
<input type="checkbox"/>	2	Y	Technical	Enterprise
<input type="checkbox"/>	3	Y	Product Information	Enterprise
<input type="checkbox"/>	4	Y	CAN WE SERVE	Enterprise

⏪ < Page 1 of 1 > ⏩
ADD EDIT DELETE

8.1.7 Call Center Calling Features

The Calling Features tab provides you with access to view and modify any call features that have been assigned at a group level for use with the Call Center such as Call Forwarding which may be used to allow a caller to dial **0** to escape from the queue.

8.1.8 Call Center My Calls

The My Calls tab provides you with the ability to Query Call Details and to obtain Call Detail Records (CDRs) for the Call Center.

From the Call Center level you will have the options for: **Queue Call Details** or **Last 20 Calls**.

8.1.9 Query Call Details – Sort By

This option will allow you to select specific criteria to generate your report:

The screenshot shows the 'My Calls' page in the Telesystem interface. On the left is a navigation sidebar with options like 'Profile', 'Calling Features', 'My Calls' (highlighted), 'Call Center Routing Policies', and 'Utilities'. The main content area is titled 'My Calls' and has two tabs: 'QUERY CALL DETAILS' (active) and 'LAST 20 CALLS'. Below the tabs is a 'Query Call Details' section with a 'Report' heading. The configuration options are as follows:

- Sort by:** Start date/time (dropdown) in descending (dropdown) order
- Date range:** from: 09/22/2016 (calendar icon) to: 09/29/2016 (calendar icon) (mm/dd/yyyy)
- Include:** Inbound calls Missed calls Outbound calls
- Search by full or partial telephone number:** (input field)
- CREATE REPORT** (button)

The following options are available when sorting:

- Start date/time
- Answer time
- Release date/time
- Call duration
- User phone
- From phone
- To phone
- Call type
- Call result
- Call category

Each of these can be sorted in descending or ascending order.

8.1.10 Query Call Details – Date Range

The date range allows for calendar dates to be selected for the period of time that you would like your results to include. Date range is formatted in the following format: MM/DD/YYYY. You may click the calendar icon  next to each text box and select a date by clicking on it within the pop up calendar.

Marketing Lab (Marketing) ▾

Call Center

Marketing CC 2 (41994420) ▾

User

All Users ▾

 Profile

 Calling Features

 My Calls

 Call Center Routing Policies

 Utilities

QUERY CALL DETAILS LAST 20 CALLS

Query Call Details

Report

Sort by: Start date/time ▾ in descending ▾ order

Date range from: 09/22/2016  to: 09/29/2016  (mm/dd/yyyy)

Include: Ir  **September 2016**  bound calls

Search by full or partial telephone number:

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

Export

Email to: _____ SUBMIT

Export report to PDF SUBMIT

Export report to CSV SUBMIT

8.1.11 Query Call Details – Include

You will have the option to indicate the types of calls you would like included in the query. The following options are available:

- Inbound Calls
- Missed Calls
- Outbound Calls

Check or uncheck the box preceding the option as desired.

Include: Inbound calls Missed calls Outbound calls

8.1.12 Query Call Details – Search By

You will have the option to only return results for a specific phone number or partial phone number. If you only want to see calls made to 419-724-9898, you can type “4197249898” into the field labeled:

Search by full or partial telephone number.

QUERY CALL DETAILS
LAST 20 CALLS

Query Call Details

Report

Sort by: Start date/time ▼ in descending ▼ order

Date range from: 09/22/2016 📅 to: 09/29/2016 📅 (mm/dd/yyyy)

Include: Inbound calls Missed calls Outbound calls

Search by full or

partial telephone 4197249898| ✕

number:

CREATE REPORT

NOTE: When searching for a number, do not add dashes, periods, or spaces. Just enter the 10 digits for the phone number as a string and perform the search. The output will match the search results exactly.

If you want to search for calls made to the 734 area code, you can type “734” into the box labeled “Search by full or partial telephone number”. Be aware that anytime the string “734” shows up in your call history, it will return the result. So a search for “734” will return 4195550734 as well as 7345551212.

Search by full or partial telephone number:

734 ✕

CREATE REPORT

8.1.13 Query Call Details – Create Report

The **Create Report** button will cause the query to run based on the criteria you have entered. The data will display at the bottom of the page in HTML format.

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE	CALLING NUMBER	CALLED NUMBER	CALLER NAME	CALL DATE	CALL TIME	ANSWER DATE/TIME	RELEASE DATE/TIME	CALL DIRECTION	CALL DURATION	ANSWER INDICATOR	CALL CATEGORY	SPECIAL CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)		413678	4199442073@combuckeye.com	+14199442073	Normal	+14199442073	4197243718		10/28/2016	03:14 PM	10/28/2016 03:14 PM		Originating		No	local	
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)		123456	4199442073@combuckeye.com	+14199442073	Normal	+14199442073	4197243718		10/28/2016	03:03 PM	10/28/2016 03:03 PM		Originating		No	local	
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)		413562	4199442073@combuckeye.com	+14199442073	Normal	+14199442073	4197243887		10/28/2016	01:55 PM	10/28/2016 01:55 PM		Originating		No	local	
4	MarketingGroup (Marketing)	Marketing Lab (Marketing)		413456	4199442073@combuckeye.com	+14199442073	Normal	+14199442073	4197243718		10/28/2016	01:53 PM	10/28/2016 01:54 PM	10/28/2016 01:54 PM	Originating	00:00:01	Yes	local	
5	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442073@combuckeye.com	+14199442073	Normal	+14197249800	4197243887		10/28/2016	01:46 PM	10/28/2016 01:46 PM	10/28/2016 01:46 PM	Originating	00:00:08	Yes	local	Sequential Ring
6	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442073@combuckeye.com	+14199442073	Normal	+14197249800	4197243718		10/28/2016	01:45 PM	10/28/2016 01:46 PM	10/28/2016 01:46 PM	Originating		No	local	Sequential Ring
7	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442073@combuckeye.com	+14199442073	Normal	+14197249800	+14199442073	Cablesystem	10/28/2016	01:45 PM	10/28/2016 01:46 PM	10/28/2016 01:46 PM	Terminating	00:00:08	Yes		
8	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442073@combuckeye.com	+14199442073	Normal	+14197249800	4197243718		10/28/2016	01:44 PM	10/28/2016 01:45 PM	10/28/2016 01:45 PM	Originating	00:00:10	Yes	local	Sequential Ring

The end result will contain the following information:

Index	The index will identify which row of data you are displaying.
Enterprise	Indicates what Enterprise within the organization the User ID is assigned to.
Group	Indicates what Group of the Enterprise hierarchy the User ID is assigned to.
Department	Indicates what Department of the Group hierarchy the User ID is assigned to.
Account Code	Unsupported field
User ID	The User ID is your phone number set as a fully qualified domain name. Example <i>4195551212@combuckeye.com</i>
Phone Number	Your phone number with the +1 prefix. For example <i>+14195551212</i>
Call Type	Displays “Normal”
Calling Number	This will display the phone number party that originated the call. The format will display the same as the Phone Number field.
Called Number	This will display the phone number of the party that received the call. The format will display the same as the Phone Number field.
Caller Name	This will display the caller ID name of the party you are speaking with if that caller is part of your Enterprise Directory.

Call Date	Displays the date of the call. The date is displayed in MM/DD/YYYY format.
Call Time	Displays the time of the call. The time is displayed in a 12-hour format with a leading 0 for single digit hours. AM and PM is not specified.
Answer Date/Time	Displays the date when the call was initially answered with the time for when the call was answered. This information will only display if the receiving party actually answers the phone. Unanswered calls will not display a result. The date and time follow the same formatting as the Call Date and Call Time .
Release Date/Time	This displays the time when the call was terminated. An unanswered call will display a release date and time. The date and time follow the same formatting as the Call Date and Call Time .
Call Direction	Indicates if the call is Originating (outgoing) or Terminating (incoming) from your perspective.
Call Duration	Displays the amount of time you participated in the call. This is shown in HH:MM:SS format.
Answer Indicator	Indicates if the call was answered with a Yes or No , or if the call went to voicemail (Yes – Post Redirection).
Call Category	Values such as: Interlat, Intralat, local, other, private
Special Call Type	Indicates if a call feature was used in order to handle this call.

NOTE: The HTML output is only capable of displaying 500 entries. If your report criterion exceeds 500 entries it is advised that you use of the “Export” options available below or narrow your date range.

8.1.14 Query Call Details – Exporting

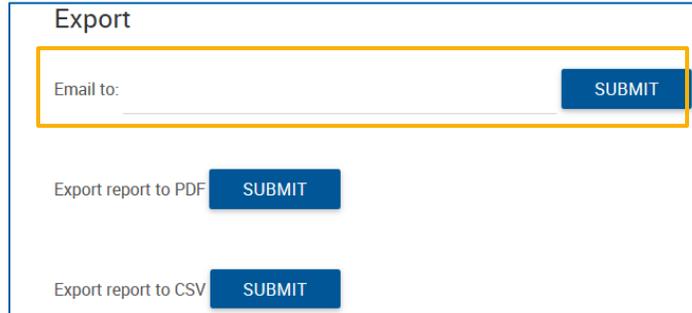
You have the option to export data via three methods:

- Email
- PDF
- CSV

8.1.14.1 Exporting – Email to

The “**Email to:**” option provides a user with the ability to select report criteria and then specify an email address to which the report details will be sent to.

After you enter an email address, click the **Submit** button. You will see a notification to the right of the button that the report is being generated and then a notice that will show “Email sent”.



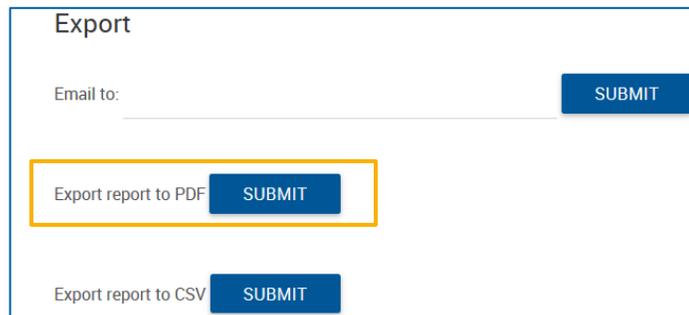
The screenshot shows the 'Export' section of a web interface. It contains three rows of options, each with a 'SUBMIT' button. The first row is 'Email to:' followed by a text input field and a 'SUBMIT' button. This row is highlighted with a yellow rectangular box. The second row is 'Export report to PDF' followed by a 'SUBMIT' button. The third row is 'Export report to CSV' followed by a 'SUBMIT' button.

If there is a problem with the email address in the “**Email to:**” field you will see a message that states “Please provide valid email”. The email address must follow the standard format such as: ‘name@email.com’.

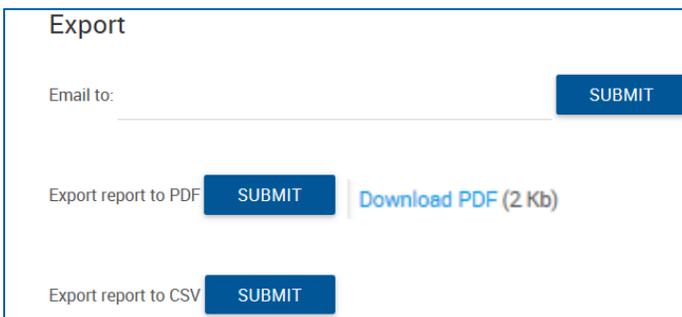
8.1.14.2 Exporting – Export to PDF

Using the **Export report to PDF** option will allow you to set the criteria as desired and then generate the report with a PDF layout. This option is good if you are interested in a report that provides all of the included data in an easy to read PDF document. The data cannot be manipulated and the document can be shared and read by any device with a PDF reader.

To export a report to PDF, set the desired report criteria and then click on the **Submit** button next to **Export report to PDF**.



The screenshot shows the 'Export' section of a web interface. It contains three rows of options, each with a 'SUBMIT' button. The first row is 'Email to:' followed by a text input field and a 'SUBMIT' button. The second row is 'Export report to PDF' followed by a 'SUBMIT' button. This row is highlighted with a yellow rectangular box. The third row is 'Export report to CSV' followed by a 'SUBMIT' button.



The screenshot shows the 'Export' section of a web interface after the 'Export report to PDF' button has been clicked. The 'Email to:' field and its 'SUBMIT' button are still visible. The 'Export report to PDF' button is now disabled, and a blue link 'Download PDF (2 Kb)' is displayed to its right. The 'Export report to CSV' button and its 'SUBMIT' button are also visible.

You will immediately see a notification that the portal is preparing the report followed by a download link and the file size.

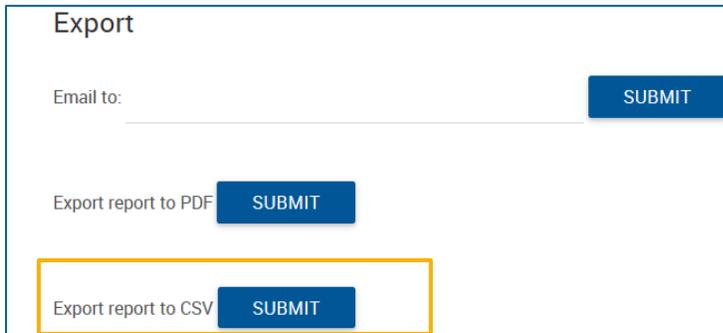
Once you click on the download link you will be presented with your browser’s default download options which will determine where the file is saved to your local computer.

NOTE: Additional software may be required to view the downloaded file. Please contact your system administrator for assistance.

8.1.14.3 Exporting – Export to CSV

Using the **Export to CSV** option will allow you to generate a report and receive the output in a CSV (Comma Separated Value) format. The CSV format allows for users to access the data in a spreadsheet editor such as Microsoft Excel®. From there, unnecessary data can be removed or additional data can be added. Users may sort the data from within the application or import the data to a database and manage it from software such as Microsoft Access®.

To export a report to CSV, set the desired report criteria and then click on the **Submit** button next to **Export report to CSV**.



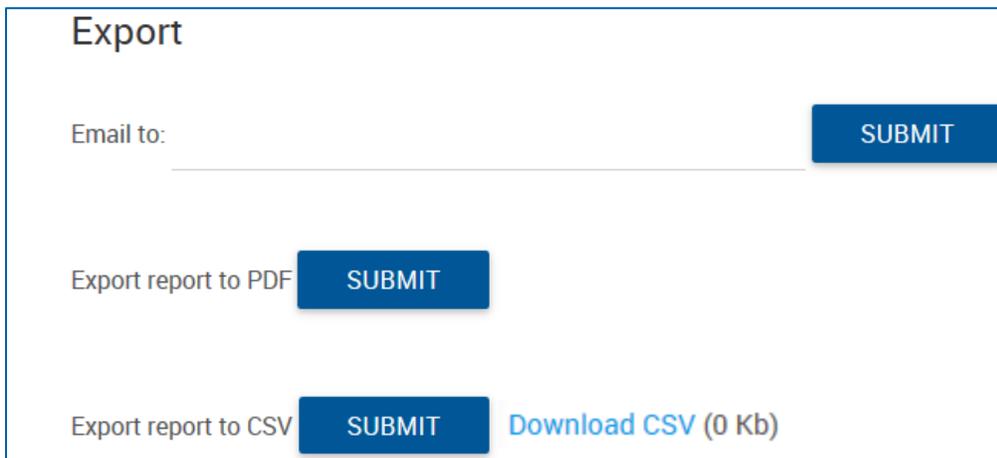
Export

Email to: _____ SUBMIT

Export report to PDF SUBMIT

Export report to CSV SUBMIT

You will immediately see a notification that the admin portal is preparing the report followed by a download link and the file size.



Export

Email to: _____ SUBMIT

Export report to PDF SUBMIT

Export report to CSV SUBMIT [Download CSV \(0 Kb\)](#)

8.1.15 Call Center – Last 20 Calls

The Last 20 Calls option will automatically generate a report of the last 20 calls associated with the Call Center. The data is outputted in HTML format. You will also have the option to email the data or export it to **PDF** or **CSV**.

My Calls

QUERY CALL DETAILS **LAST 20 CALLS**

Last 20 Calls

Export

Email to:

Export report to PDF

Export report to CSV

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE	CALLING NUMBER	CALLED NUMBER	CALLER NAME	CALL DATE	CALL TIME	ANSWER DATE/TIME	RELEASE DATE/TIME	CALL DIRECTION	CALL DURATION	ANSWER INDICATOR	CALL CATEGORY	SPECIAL CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)		413678	4199442073@combucketeye.com	+14199442073	Normal	+14199442073	4197243718		10/28/2016	03:14 PM	10/28/2016 03:14 PM	Originating		No	local		
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)		123456	4199442073@combucketeye.com	+14199442073	Normal	+14199442073	4197243718		10/28/2016	03:03 PM	10/28/2016 03:03 PM	Originating		No	local		
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)		413562	4199442073@combucketeye.com	+14199442073	Normal	+14199442073	4197243887		10/28/2016	01:55 PM	10/28/2016 01:55 PM	Originating		No	local		
4	MarketingGroup (Marketing)	Marketing Lab (Marketing)		413456	4199442073@combucketeye.com	+14199442073	Normal	+14199442073	4197243718		10/28/2016	01:53 PM	10/28/2016 01:54 PM	Originating	00:00:01	Yes	local		
5	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442073@combucketeye.com	+14199442073	Normal	+14197249800	4197243887		10/28/2016	01:46 PM	10/28/2016 01:46 PM	Originating	00:00:08	Yes	local	Sequential Ring	
6	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442073@combucketeye.com	+14199442073	Normal	+14197249800	4197243718		10/28/2016	01:45 PM	10/28/2016 01:46 PM	Originating		No	local	Sequential Ring	
7	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442073@combucketeye.com	+14199442073	Normal	+14197249800	+14199442073	Cablesystem	10/28/2016	01:45 PM	10/28/2016 01:46 PM	Terminating	00:00:08	Yes			

8.2 Call Center Routing Policies for Individual Call Centers

This tab allows you configure the various routing features of Call Centers. **Not all features listed in this section are available for every Call Center Type.** Only Premium Call Centers will have all listed features.

Features available include:

- Forced Forwarding
- Holiday Service
- Night Service
- Bounced Calls
- Comfort Message Bypass
- Call Center Overflow
- Stranded Calls

8.2.1 Call Center Forced Forwarding

This section is used to configure the Call Center to temporarily divert new incoming calls to a different route independent of the Night Service route. Forced Forwarding does not affect calls already in the queue.

This is only available for Premium Call Centers.

Steps	Details
1. Enable or disable forced forwarding.	Select On to enable forced forwarding or Off to disable it.
2. Define where you would like calls forwarded.	In the Calls Forward to phone number/SIP-URI text box, enter the number.
3. Allow or forbid the use of feature access codes.	Check or uncheck Allow feature access codes to configure forced forwarding.
4. Define if an announcement is played before forwarding.	Check or uncheck Play announcement before forwarding.
5. Select the audio file.	For the Audio file, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter the address in the text box • Custom and then select the custom file by clicking Browse and Click Upload.
6. Save your changes or exit without saving.	To save your changes, click Save .

MarketingLabAdmin

Welcome MarketingLabAdmin

Enterprise
MarketingGroup (Marketing)

Group
Marketing Lab (Marketing)

Call Center
Marketing CC 2 (41994420)

User
All Users

Profile

Calling Features

My Calls

Call Center Routing Policies

Utilities

Call Center Routing Policies

Call Center Routing Policies

SAVE

Forced Forwarding

Forced Forwarding: On Off

Calls Forward to phone number: _____

Allow feature access codes to configure forced forwarding

Play announcement before forwarding

Audio:

Default

URL

Custom

8.2.2 Call Center Holiday Service

Use this section to configure the Call Center to route calls differently during the holidays.

Steps	Details
1. Configure the Action settings.	Select from the following: <ul style="list-style-type: none"> None Perform busy treatment Transfer to phone number/SIP-URI: and then enter the SIP-URI in the text box
2. Select the holiday schedule.	From the Holiday Schedule drop-down list, select the holiday schedule.
3. Define if an announcement is played.	Check or uncheck Play announcement before holiday service action .
4. Select the audio file.	For the Audio files, select from the following: <ul style="list-style-type: none"> Default URL and then enter the address in the text box Custom and then select the custom file by clicking Browse to find a file and click Upload.
5. Save your changes or exit without saving.	To save your changes, click Save .

Holiday Service

Action:

None

Perform busy treatment

Transfer to phone number: X

Holiday Schedule: ▼

Play announcement before holiday service action

Audio:

Default

URL

Custom

8.2.3 Call Center Night Service

Use this section to configure the Call Center to route calls differently during hours when the queue is not in service. This is determined by a schedule that defiles the business hours of the queue. Night Service cannot be disabled; however, it can have a schedule that defines business hours to be 24 x 7, which means no night service is provided.

Night service requires Premium Call Center

Steps	Details
1. Configure the Action settings.	Select from the follow: <ul style="list-style-type: none"> • None • Perform busy treatment • Transfer to phone number/SIP-URI and then enter the SIP-URI in the text box
2. Set to force night service.	For Force night service now regardless of business hours schedule , select On or Off .
3. Select business hours.	From the Business hours drop-down list, select the business hours.
4. Define if feature access codes can override the night service.	Check or uncheck All feature access codes to manually override night service .
5. Define if an announcement is played.	Check or uncheck Play announcement before night service action . Select from the following modes for the announcement: <ul style="list-style-type: none"> • Normal announcement • Manual mode announcement
6. Select the Normal Mode Audio file.	For the Normal Mode Audio files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter the address in the text box • Custom and then select the custom file by clicking Browse to find a file and click Upload.
7. Select a Manual Mode Audio file	For the Manual Mode Audio or Video files, select from the following: <ul style="list-style-type: none"> • Default • URL and enter the address in the text box • Custom and then select the custom file by clicking Browse to find a file and click Upload text box
8. Save your changes or exit without saving.	To save your changes, click Save .

Night Service

Action:

- None
- Perform busy treatment
- Transfer to phone number:

Force night service now regardless of business hours schedule: On Off

Business Hours: ▼

Allow feature access codes to manually override night service

Play announcement before night service action

Announcement to play in manual override mode: Normal announcement Manual mode announcement

Normal Mode Audio:

- Default
- URL
- Custom

Manual Mode Audio:

- Default
- URL
- Custom

8.2.4 Call Center Bounced Calls

Configure the Call Center routing policy for calls unanswered by agents.

Steps	Details
1. Select whether or not to bounce calls.	Check or uncheck Bounce calls after [x] rings and then enter the number of rings in the text box.
2. Select whether or not to transfer the call.	Check or uncheck Transfer to phone number/SIP-URI and then enter the number in the text box.
3. Select whether or not to bounce calls when agent is unavailable.	Check or uncheck Bounce calls if agent becomes unavailable while routing the call.
4. Save your changes or exit without saving.	To save your changes, click Save .

Bounced Calls

Bounce Calls after rings

Transfer to phone number:

Bounce calls if agent becomes unavailable while routing the call

Alert agent if call is on hold for longer than seconds

Bounce calls after being on hold by agent for longer than seconds

8.2.5 Comfort Message Bypass

Use this section to configure the Call Center to play ringing and/or a different message instead of music and comfort messages whenever the call is expected to be answered quickly.

This is only available for Premium Call Centers.

Steps	Details
1. Enable or disable comfort message bypass.	Select On to enable Comfort Message Bypass or Off to disable it.
2. Define the wait time.	For the Bypass comfort message when estimated wait time is less than [x] seconds , enter the time in seconds in the text box.
3. Define if an announcement is played after ringing and then define the time.	Check or uncheck Play announcement after ringing for [x] seconds and then enter the time in the text box.
4. Select the audio file	For the Audio file, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter the address in the text box • Custom and then select the custom file by clicking Browse to find a file and click Upload.
5. Save your changes or exit without saving.	To save your changes, click Save .

Comfort Message Bypass

Comfort Message Bypass: On Off

Bypass comfort message when estimated wait time is less than: seconds

Play announcement after ringing for seconds

Audio:

Default

URL

Custom

8.2.6 Overflow

You use this section to configure the Call Center Routing Policy when a large number of calls have been received or calls have been waiting longer than the configured threshold.

Steps	Details
1. Configure the Action settings.	Select from the following: <ul style="list-style-type: none"> • Perform busy treatment • Transfer to phone number/SIP-URI and then enter the SIP-URI in the text box • Play ringing until caller hangs up
2. Select the overflow time.	Check or uncheck Enable overflow after calls, wait [x] seconds , and enter the number of seconds in the text box.
3. Select to play an announcement before overflow processing.	Check or uncheck Play announcement before overflow processing .
4. Select an audio file.	For the Audio files, select from the following: <ul style="list-style-type: none"> • Default • URL and then enter the address in the text box • Custom and then select the custom file by clicking Browse to find a file and click Upload.
5. Save your changes or exit without saving.	To save your changes, click Save .

Overflow

Action:

Perform busy treatment

Transfer to phone number: _____

Play ringing until caller hangs up

Enable overflow after calls wait seconds

Play announcement before overflow processing

Audio:

Default

URL

Custom

8.2.7 Call Center Stranded Calls

Configure the Call Center Routing Policy for calls stranded in queue when all agents have signed out.

Steps	Details
1. Configure the Action settings.	<p>Select from the following:</p> <ul style="list-style-type: none"> • Leave in queue • Perform busy treatment • Transfer to phone number/SIP-URI and then enter the SIP-URI in the text box • Night Service <i>(Requires Premium Call Center)</i> • Play ringing until caller hangs up <i>(Requires Premium Call Center)</i> • Play announcement until caller hangs up <i>(Requires Premium Call Center)</i>
2. Select an audio or video file <i>(Requires Premium Call Center)</i>	<p>For the Audio files, select from the following:</p> <ul style="list-style-type: none"> • Default • URL and then enter the address in the text box • Custom and then select the custom file by clicking Browse to find a file and click Upload.
3. Save your changes or exit without saving.	To save your changes, click Save .

Stranded Calls - Unavailable

This policy is performed when all agents are unavailable, and:

at least _____ agents have unavailable code: --None--

Action:

Leave in queue

Perform busy treatment

Transfer to phone number: _____

Night Service

Play ringing until caller hangs up

Play announcement until caller hangs up

Audio:

Default

URL

Custom

SAVE

8.3 Call Center Utilities

The Call Center Utilities tab contains the following menus:

- Enterprise Directory
- Document Repository
- Registrations
- Feature Access Codes

8.3.1 Call Center Enterprise Directory

The Enterprise Directory menu provides you with a data table of the entire Enterprise Directory. The directory displays the following information regarding each user or group where applicable:

- Name
- Number
- Extension
- Mobile (phone number)
- Email Address
- Department
- Group ID
- Yahoo ID

You may search for a specific entry in the directory using the available search fields. Entries can be searched for by Last Name, First Name, or Phone number. Search results can be expanded or narrowed using the drop-down menu with the options: **Starts With**, **Contains**, and **Equal To**.

From this menu, you also have links available to view the Enterprise Directory Summary as a separate web page or download it as a PDF as well as viewing the Enterprise Directory Detail as a separate web page or download it as a PDF.

Enterprise Directory Summary Enterprise Directory Detail Enterprise Directory Summary - PDF Enterprise Directory Detail - PDF							
Last Name ▾ Starts With ▾ <input type="button" value="SEARCH"/>							
NAME	NUMBER	EXTENSION	MOBILE	EMAIL ADDRESS	DEPARTMENT	GROUP ID	YAHOO ID
BMG Hunt Group (Hunt Group)	4199442075	35482268-2075			Marketing (Marketing)	Marketing	
Burgers, Johnny's	+1-4195555555	35482268-5555				Marketing	
Cell Phone, Jason	+1-4192706112	35482268-2000				Marketing	
Custodial Services	4195550369						
Dept, Product	+1-4197242050	35482268-2050				Marketing	

8.3.2 Call Center Document Repository

Document repository acts as a centralized repository to keep track of help guides, templates, etc.

8.3.3 Call Center Registrations

You use this page to view your static and dynamic registrations.

Item	Description
Endpoint Type	The SIP device or virtual user endpoint at which the service is deployed. Valid types include Primary, Video Add On, and Shared Call Appearance.
Line/Port	The line, port number or SIP address of the endpoint location. This information is dependent on the identity/device profile's type.
Identity/Device Profile name	The assigned Identity/Device Profile in the system.
URI	The Universal Resource Indicator (URI) identifying the device. Both Static and dynamic registrations are possible, depending on the device profile.
Expiration	The registration expiry date, for dynamic registrations.

8.3.4 Call Center Features Access Codes

The Feature Access Codes menu displays touch tone codes for features that can be used in conjunction with your Call Center.

Utilities

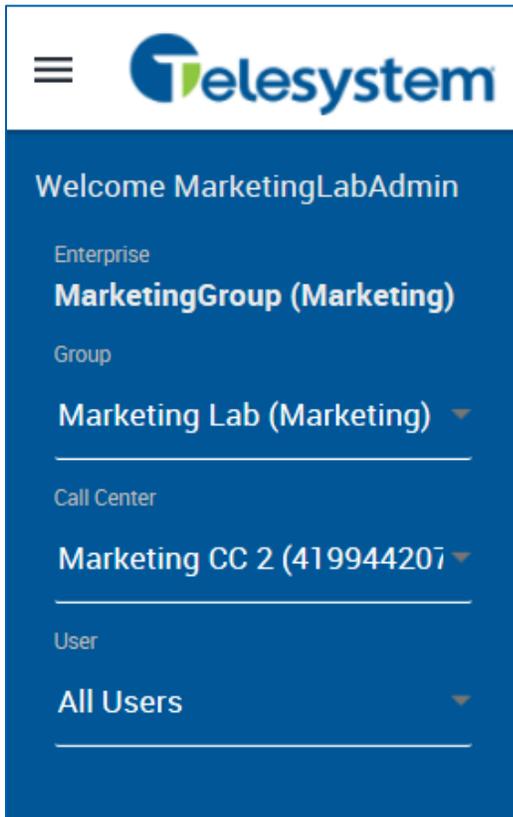
ENTERPRISE DIRECTORY DOCUMENT REPOSITORY REGISTRATIONS **FEATURE ACCESS CODES**

Feature Access Codes

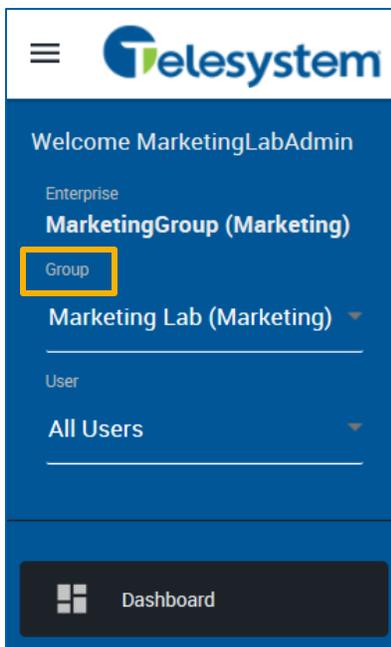
FEATURE ACCESS CODE NAME	MAIN (REQUIRED)	ALTERNATE (OPTIONAL)
Call Park	*68	
Call Park Retrieve	*88	
Call Pickup	*98	
EOCP Sustained Authorization Code Lock	*37	
EOCP Sustained Authorization Code Unlock	*47	
FMFM Call Push	*26	
Group Call Park	#58	
Music On Hold Per-Call Deactivation	*60	
Per-Call Account Code	*71	

8.4 Call Center Navigation

Navigate between Call Centers and users with drop-down boxes available at the top of the screen:



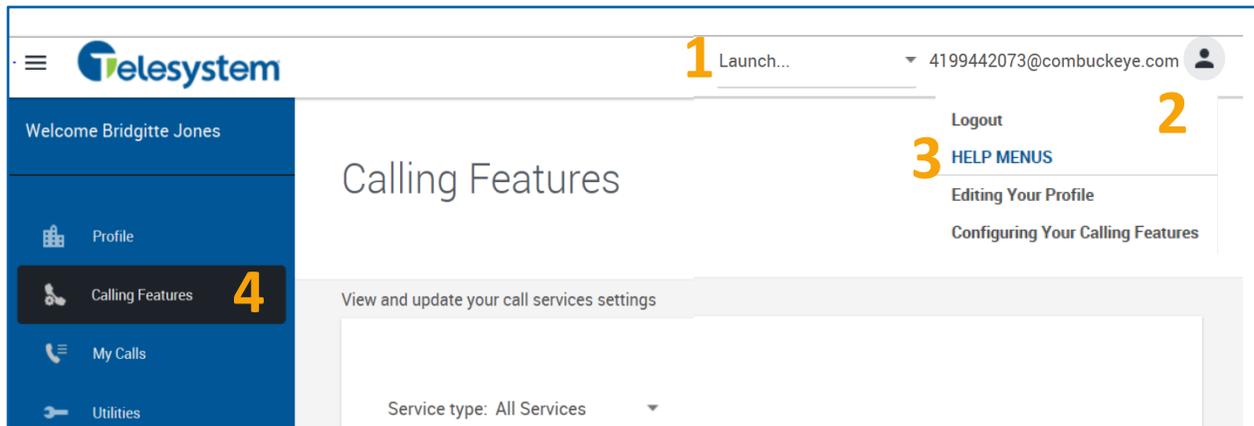
Return back to the Group Dashboard by clicking on the **Group** link:



9 Hosted VoIP Phone System Admin Portal Interface (User Access)

Once a user is assigned to a Call Center as an Agent or a Supervisor, they will have call control settings within their personal profile that they can configure specifically for Call Center. A Group or Enterprise administrator may access their User Profile for them and configure these settings. To access a user’s profile from the administrator login, use the drop-down box and locate the desired user. When you click on their information it will direct you to the user’s settings.

When you initially log into the portal you will be presented with the following interface:



1	Application Launch Drop-Down Box	From here users may launch applications associated with their Hosted VoIP Phone System service such as Call Center or Receptionist.
2	User ID and Logout	Displays the user ID associated with the user account you are logged into and a link to logout of the portal.
3	Help available	This is a dynamic link to the online help portal. Mousing over this link will provide you with different help options depending on the contents of the current page.
4	Navigation Tabs	These tabs allow you to navigate through the different settings and options available with the user portal. Some of the tabs may provide you with additional menus to navigate through settings.

9.1 Call Center – Agent (User Administration)

The Call Center Agent feature will only be available to users who have a Call Center Agent or Call Center Supervisor license assigned to them. This setting is available on the **Call Features** tab under the **Call Control** section. This section displays your current Automatic Call Distribution (ACD) state as well as all the ACDs or Call Centers that you belong to and whether you are current joined in their Call Centers. You may set your ACD state and you can join or remove yourself from that ACD’s Call Center (if permitted by your administrator).

From Your Web Portal:

Steps	Details
Click Edit to configure this service.	
1. Select the timer settings.	For the Use Guard Timer Setting , select Default or User . Select Enable guard timer and then select the amount of time from the second’s drop-down list to configure the amount of time.
2. Select the unavailable agent settings.	<ul style="list-style-type: none"> For the Use Agent Unavailable Settings, select either Default or User. Check or uncheck Force agent to unavailable on Do Not Disturb activation. Check or uncheck Force agent to unavailable on personal calls. Check or uncheck Force agent to unavailable after [x] consecutive bounced calls and then select the number of bounced calls from the drop-down list.
3. Select the ACD state.	<ul style="list-style-type: none"> From the ACD drop-down list, select the ACD state.
4. Join the Call Center.	<ul style="list-style-type: none"> Check or uncheck the box in the Join Call Center column of the row belonging to the Call Center you would like to join.
5. Save your changes.	<ul style="list-style-type: none"> Click Save.

Call Center - Agent

Call Center Type: **Premium**

Sign-Out ▼

HIDE CALL CENTERS

VIEW SETTINGS ACD State:

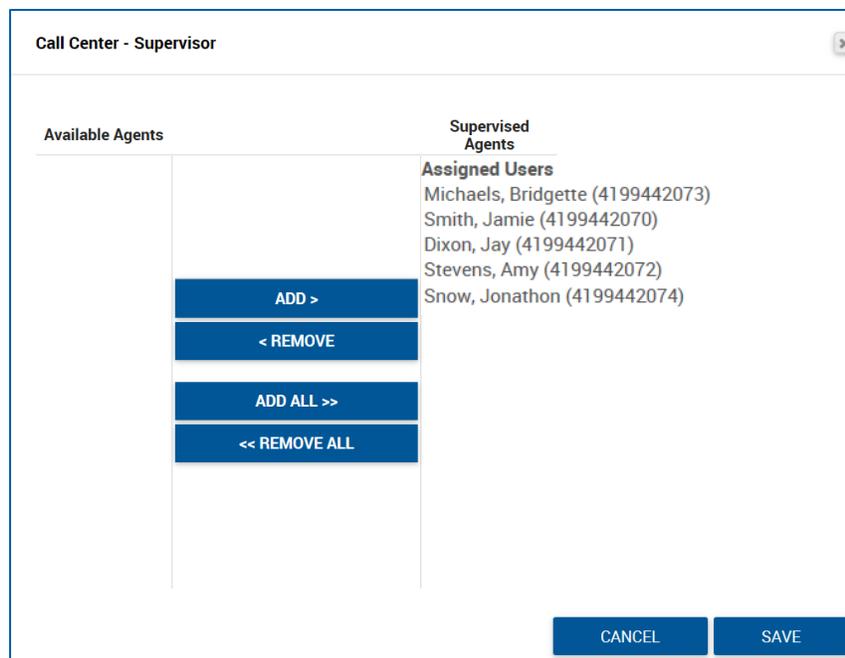
	JOIN	CALL CENTER ID	PHONE NUMBER	EXTENSION
<input checked="" type="checkbox"/>		4195551212		9876
<input checked="" type="checkbox"/>		4199442077CC	4199442077	2077

9.2 Call Center – Supervisor (User Administration)

The Call Center Supervisor feature will only be available to users who have a Call Center Supervisor license assigned to them. This setting is available on the **Call Features** tab under the **Call Control** section. This section allows you to configure agents to be supervised. Available agents are all Call Center agents in your Call Center and can include agents that are also supervisors.

From Your Web Portal:

Steps	Details
Click the View Call Centers button to show all Call Centers you are assigned to and access the Edit buttons for each Call Center.	
Access the center to view available agents:	Click the Edit button for the Call Center you wish to view.
Assign/remove supervised agents:	<p>The Available Agents list will display agents that are currently assigned to your Call Center that you can supervise. The Supervised Agents list displays all of the agents you are already supervising.</p> <ul style="list-style-type: none"> Click on an agent in the Available Agents list and click the Add button to add the agent to the Supervised Agent list. Click on an agent in the Supervised Agent list and click on the Remove button to stop supervising the agent and move them to the Available Agents list. Click the Add All button to supervise all agents. All agents will display in the Supervised Agents list. Click the Remove All button to stop supervising all agents. All agents will appear in the Available Agents list.
Save changes:	Click Save to keep your changes or Cancel to discard your changes and keep the current settings.



9.2.1 Client Applications – (Calling Features)

The Call Center section in the **Client Applications** section of the **Calling Features** tab is where a user can go to configure their Call Center settings if they are assigned a Supervisor license.

Call Center Supervisors will click a **View** button which will expand a list of all Call Centers they are assigned to. Each Call Center will display the Call Center ID, Phone Number, and Extension. Each will also have an **Edit** button. Clicking on the **Edit** button will allow you to view Available Agents and Assigned Agents. You may add and/or remove agents that are assigned to you from here.

HIDE CALL CENTERS

 Call Center - Supervisor

CALL CENTER ID	PHONE NUMBER	EXTENSION	TYPE	
4199442077CC	4199442077	2077	Premium	EDIT

Tasks	Steps
<p>To add users:</p>	<ol style="list-style-type: none"> 1. In the Available Users column, select the user. In a column, you can select some or all of the items. Item names are listed in alphabetical order. To select several items listed in consecutive order, click the first item name you want and, while holding down the SHIFT key on your keyboard, click the last item name you want to select. To select more than one item, but not in a particular order, use your mouse to click the item names while holding down the CTRL key on your keyboard. 2. Click Add> to move selected user to the Monitored Users column. 3. To move all users (unselected), click Add All>>. 4. Click Save.
<p>To remove users:</p>	<ol style="list-style-type: none"> 1. In the Assigned Agents column, select the user. In this column, you can select some or all of the agents. To select several agents listed in consecutive order, click the first agent name you want and, while holding down the SHIFT key on your keyboard, click the last agent name you want to select. To select more than one agent, but not in a particular order, use your mouse to click the agent names while holding down the CTRL key on your keyboard. 2. Click Remove< to move selected users to the Available Users column. 3. To move all users (unselected), click Remove All<<. 4. Click Save.

Call Center - Supervisor ✕

Available Agents	Supervised Agents
<p style="text-align: center;">ADD ></p> <p style="text-align: center;">< REMOVE</p> <p style="text-align: center;">ADD ALL >></p> <p style="text-align: center;"><< REMOVE ALL</p>	<p>Assigned Users</p> <p>Michaels, Bridgette (4199442073)</p> <p>Smith, Jamie (4199442070)</p> <p>Dixon, Jay (4199442071)</p> <p>Stevens, Amy (4199442072)</p> <p>Snow, Jonathon (4199442074)</p>

CANCEL **SAVE**