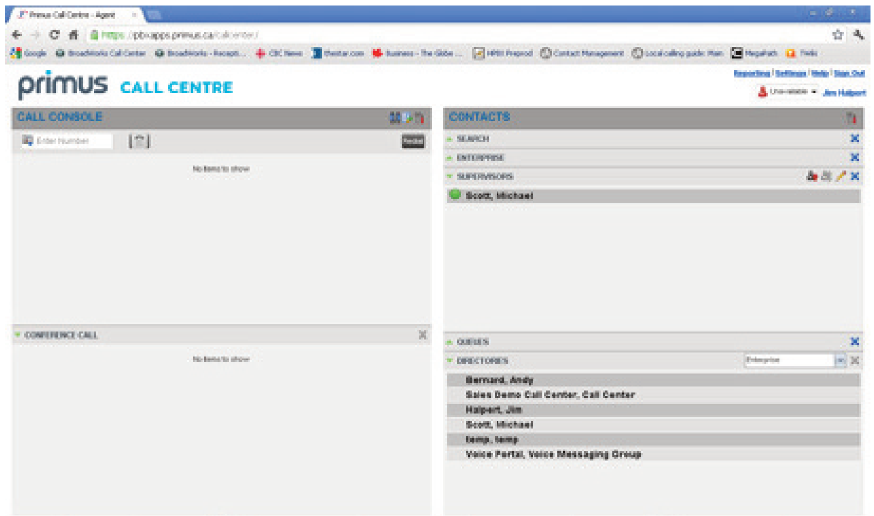
Primus Hosted PBX Call Centre Quick Reference Guide

AGENT TASKS



Call Centre Interface

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

- **Global Message Area –** This is located to the right of the Call Centre name. It displays messages to the user.
- **Call Console –** This is located on the left-hand side of the Call Centre main page. It allows you to manage current calls.

The main area of the Call Console displays your current calls and allows you to take actions on them.

In addition, the Call Console contains the following panels:

- *Dialer* – This is where you dial ad hoc numbers.
- *Conference Call* – This is where you manage conference calls.

- **Contacts pane –** This is located on the right-hand side of the Call Centre main page. It allows you to make calls to contacts and manage contact directories. It contains the following areas:
  - *Contact Directories panels* – You use these to access and manage your contacts.
  - *Search panel* – You use this to search for contacts.
  - *Directories panel* – This consolidates contacts from several directories.

- **Links to other windows:**
  - ***Settings –*** This provides access to client configuration pages.
  - ***Help –*** When clicked, this opens the Hosted PBX help page with all user guides.
  - ***Sign-Out –*** When clicked, this signs you out of the call centre and allows you to save your workspace.

Agent Automatic Call Distribution (ACD) States

Your ACD state can be one of the following:

Available – You are available to receive calls.

Unavailable – You are not available to receive calls.

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

Configure Your Post Sign-In ACD State

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

Change Your ACD State and Set Unavailable Code

1. At the top right-hand side of the main window, click **ACD States** and then select your new state from the drop-down list.
2. If the Unavailable Codes feature is enabled and you select Unavailable as your ACD state, a list of codes to choose from appears. Select the code that best describes the reason for your unavailability.

Select Your Outgoing Call Identity

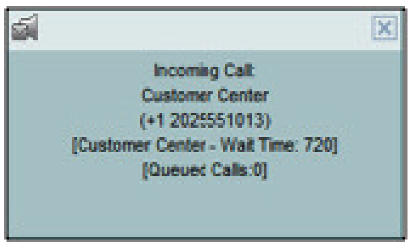
1. In the Dialer, click Outbound CLID .
2. From the drop-down list, select the phone number to display when you are making a call.

View Incoming Call Details

If the Notification feature is enabled, a notification window appears on top of the system tray when you receive a call, displaying the name and number of the caller.

For calls from queues, it displays:

- Calling name and number on which the call was received
- Call centre or DNIS name
- Wait time of the call
- Number of calls in queue



Open URL

You can open a Uniform Resource Locator (URL) page in your browser to obtain more information about the incoming call. This page contains information about the calling party encoded in its URL.

In the *Call Notification* pop-up window that appears when you receive a call, click **Web Pop URL** .

Save vCard

When Outlook is running, you can save the caller's phone number and personal information as a vCard in Outlook.

In the *Call Notification* pop-up window that appears when you receive a call, click **Add vCard** .

Dial Ad Hoc Number

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

Call Contact

1. In the *Contacts pane*, click the contact to call and then click **CALL** for that contact.
2. To dial the contact's extension, click **EXT** or click **MOB** to dial the contact's mobile number.

Redial Number

Up to 10 previously dialed numbers are available.

In the *Dialer*, click the **Redial** button and then select a number from the list.

Dial from Call History

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

Dial from Search

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

Answer Call

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

In the **Call Console**, click **Auto Answer** .

Note that this feature works only if your device is Advanced Call Control (ACC)-compliant. In addition, if Auto Answer is enabled on the server, you must not enable Auto Answer in the client.

To answer a call manually:

Move the mouse over an incoming call and click **ANS**.

Blind Transfer Call

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

1. To transfer the call to an ad hoc number, enter the number in the Dialer and then click **Transfer**.
2. To transfer the call to a contact, click a contact in one of the contact's directories and then click **TXR** for that contact.

Transfer Call with Consultation

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

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

Transfer to Queue

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

Hold Call

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

Resume Call

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

End Call

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

Generate Call Trace

To generate a call trace for a current call:

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

To generate a call trace for the last released call:

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

Tag ACD Call with Disposition Codes

More than one disposition code can be assigned to a call.

To assign disposition codes to a current call:

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

To assign disposition codes in Wrap-Up:

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

Start Three-Way Conference

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

Add Participant to Conference

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

Hold or Resume Conference

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

Leave Conference

You can only leave a Three-Way conference.

In the *Conference Call* panel, click **LEAVE**. The other parties continue their conversation and the calls are removed from the *Conference Call* panel.

Drop Call from Conference

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

Hold Conference Participant

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

Resume Conference Participant

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

End Conference

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

Monitor Supervisor Phone State

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

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

Phone States

The phone state of a supervisor can be Idle, Busy, Ringing, Not Disturb, Private, Forwarding, or Unknown.

Make Emergency Call to Supervisor

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

Blind Escalate Call to Supervisor:

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

Escalate Call with Consultation

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

Escalate Call with Conference or Hand Over

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

Escalate Call with Mid-Conference Hold

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

Camp on Busy Contact

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

Display Call History

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

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

Delete Call History

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

Show or Hide Contacts

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

Search for Contacts

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

Note that the search is not case-sensitive.

Manage Speed Dial and Personal Directories

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

Note that you cannot modify a *Personal* entry.

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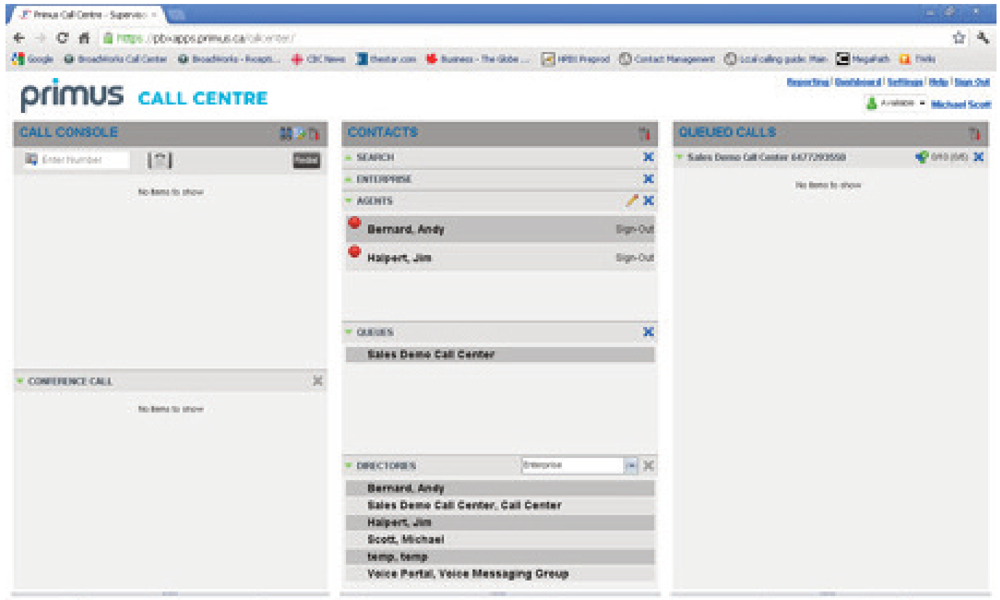
SUPERVISOR TASKS



Monitor Agents

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

To select agents to monitor:

1. In the *Agents* panel, click the **Edit** button .
2. In the dialog box that appears, check the agents to monitor.
3. Click **Save**. The selected agents have their combined phone and ACD state displayed.

The state icon of an agent who is not joined in a call centre is shaded.

Change Agent's ACD State

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

3. If you selected *Unavailable*, you may also have to select an unavailability code.

Pick up Agent's Call

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

Silently Monitor Agent's Current Call

The agent to monitor must have exactly one active call.

1. In the *Contacts* pane, expand the Agents panel.
2. Click the agent and then click **SM** for the selected agent.

A new call is created in the *Conference Call* panel. You are conferenced in to the call and muted.

Silently Monitor Agent's Next Call

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

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

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

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

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

Un-mute Silently Monitored Call

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

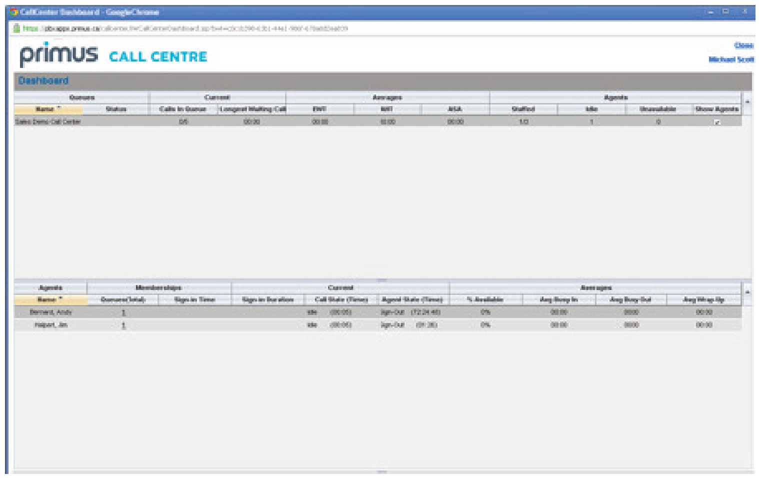
Barge In on Agent's Call

The agent must have exactly one active call.

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

View Agents and Queues Statistics

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



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

Note that by default, agent statistics are not displayed.

To display agent statistics for a call centre:

In the *Queue Summary*, check the Show Agents box in the row for that call centre.

Monitor Queues

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

To select call centres to monitor:

1. At the top right-hand side of the *Queued Calls* pane, click **Options** and select *Edit Queue Favorite Dialog* from the menu.
2. In the dialog box that appears, check the call centres to display.
3. Click **Save**. The selected call centres appear in the *Queued Calls* pane. The following information is displayed for each call centre:
   - Call centre name and phone number
   - Service Mode icon/button
   - Message Waiting icon (if there are new messages)
   - Ratio of queued calls to call centre's call capacity

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

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

For each call, the following information is displayed:

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

Clicking a call expands the call to show additional data:

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

Enable Night Service Override or Forced Forwarding

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

Note that Forced Forwarding has precedence over Night Service Override.

Promote Call in Queue (Premium Call Centre)

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

Position Call in Queue

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

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

Transfer Call to Top of Queue

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

Retrieve Call from Queue

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

Transfer Call from Queue to Agent

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

Transfer Call from Queue to Adhoc Humber

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

Transfer Calls between Queues

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

REPORTING

Call Centre provides Call Centre Reporting Server (CCRS) and Enhanced reporting.

The following CCRS reports are available to you:

- Agent Activity (historical or real-time) – This provides metrics about agents' call handling activities for a call centre.
- Agent Utilization (historical) – This provides metrics related to agents' call performance for a call centre.
- Queue Performance Analysis (historical or real-time) – This displays metrics related to the performance of a call centre ACD.
- Service Level (historical) – This displays metrics related to the speed of answering ACD calls.

Enhanced reports are configurable and the reports available to you depend on your system configuration. For information, consult your administrator.

Note that agents can only request reports about themselves.

Run Enhanced Report

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

Schedule Enhanced Report

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

Manage Scheduled Reports

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

Report Storage Limits

Report data is stored on a limited basis depending on the incremental time you are requesting to view. In short, the longer the increment you would like to report on the longer the data is stored. The following is a guideline of how long we store the reports:

Call Detail Data – 90 days

15 minute – 90 days

30 minute – 180 days

1 hour – 397 days

Sign In/Out – 397 days

We recommend that you generate reports in XLS or PDF for data that you require to maintain for longer periods of time and save the report to your hard drive or servers.

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KEYBOARD SHORTCUTS

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

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