4.5.1 Call Action Buttons
5 Manage Calls
5.1 Call Management Operations Quick Reference
5.2 Drag and Drop Call onto Contact
5.3 View Calls
5.3.1 View Current Calls
5.3.2 View Incoming Call Details
5.4 Assign Disposition Codes (Premium Call Center)
5.4.1 Assign Disposition Codes to Current Call
5.4.2 Assign Disposition Codes in Wrap-Up
5.5 Receive, Answer, and End Calls
5.5.1 Answer Call
5.5.2 Auto Answer Calls
5.5.3 Open URL
5.5.4 Save vCard
5.5.5 End Call
5.6 Make Outbound Calls
5.6.1 Set Your Outgoing Calling Line Identity (Premium Call Center)
5.6.2 Dial Ad Hoc Number
5.6.3 Redial Number
5.6.4 Dial Contact
5.6.5 Dial from Search
5.6.6 Dial from History
5.7 Place Calls on Hold, Resume, and Camp Calls
5.7.1 Place Call on Hold
5.7.2 Resume Held Call
5.7.3 Conduct Busy Camp On
5.8 Transfer Calls
5.8.1 Blind Transfer
5.8.2 Transfer with Consultation
5.8.3 Transfer to Queue
5.9 Escalate Calls
5.9.1 Make Emergency Call
5.9.2 Blind Escalate Call
5.9.3 Escalate with Consultation
5.9.4 Escalate with Conference or Handover
5.9.5 Escalate with Mid-Conference Hold
5.10 Manage Conference Calls
5.10.1 Start Three-Way Conference
5.10.2 Add Participant to Conference
5.10.3 Hold Conference
5.10.4 Resume Conference
5.10.5 Hold Participant
6 Manage Call History
6.1 View Call History
6.2 Delete Call History
7 E-mail Contacts
7.1 Send E-mail Message to Contact
8 Manage Contacts
8.1 View Contacts
8.1.1 Show or Hide Directories
8.1.2 Display Directory Below Call Console
8.1.3 Show or Hide Directory Content
8.1.4 Show Contact Details
8.1.5 Select Display Order
8.2 Organize Contacts
8.2.1 Sort Contacts
8.3 Search for Contacts
8.3.1 Perform Contact Search
8.4 Manage Personal Contacts
8.4.1 Add Personal Contact
8.4.2 Delete Personal Contact
8.5 Manage Speed Dial Numbers
8.5.1 Add Speed Dial Entry
8.5.2 Modify Speed Dial Entry
8.5.3 Delete Speed Dial Entry
9 Monitor Supervisors
9.1 Select Supervisors to Monitor
9.2 Supervisor Phone States
10 Monitor Call Centers
10.1 Dashboard Pane
10.2 Select Call Centers to Monitor
10.3 Select Information to Display
10.4 Order Call Centers
11 Generate Reports
11.1 Run Report
11.2 Schedule Report
11.3 Manage Scheduled Reports
12 Configure Call Center
Hosted Call Center Agent

12.1 Settings – General.............................................................................................................85
  12.1.1 Account ................................................................................................................85
  12.1.2 Hotel Guest ...............................................................................................................86
  12.1.3 Language ...............................................................................................................86
  12.1.4 Screen Pop .............................................................................................................86
  12.1.5 Date Format ..........................................................................................................87
  12.1.6 Time Format ..........................................................................................................87
  12.1.7 Workspace ............................................................................................................87
12.2 Settings – Application .....................................................................................................89
  12.2.1 Queue Memberships ............................................................................................89
  12.2.2 Agent Policies ......................................................................................................89
12.3 Settings – Services ..........................................................................................................90
12.4 Settings – Plug-ins ..........................................................................................................91
  12.4.1 Notification ...........................................................................................................91
  12.4.2 Microsoft Outlook ...............................................................................................92
  12.4.3 LDAP v3 ...............................................................................................................92
  12.4.4 Program Shortcuts ...............................................................................................93
  12.4.5 Call Event Log .....................................................................................................93
12.5 Settings – Messaging ......................................................................................................94
  12.5.1 E-mail Messaging .................................................................................................94
12.6 Settings – Report .............................................................................................................95
  12.6.1 Default Thresholds .............................................................................................95
  12.6.2 Default Start Day of the Week .............................................................................95
  12.6.3 Default Service-level Calculations .....................................................................96
12.7 Settings – About ..............................................................................................................96

13 Appendix A: Glossary and Definitions ...............................................................................97

13.1 ACD States ....................................................................................................................97
13.2 Agent Skill Levels (Premium Call Center)....................................................................98
13.3 Phone States ................................................................................................................98
13.4 Call States ....................................................................................................................99
13.5 Call Types ....................................................................................................................99

14 Appendix B: Keyboard Shortcuts ......................................................................................101
1 About This Document

This user guide provides step-by-step procedures and reference information for using the Hosted Call Center Release 19.0 client application for Agents.

1.1 Audience

This document is intended for Call Center agents who use the Hosted Call Center client.

1.2 How This Guide is Organized

The following table identifies the sections to refer to for information about the functionality provided by the Hosted Call Center.

<table>
<thead>
<tr>
<th>Section</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction to Call Center</td>
<td>This section provides an overview of Call Center and the functionality available to agents.</td>
</tr>
<tr>
<td>Getting Started</td>
<td>This section describes how to sign in and out of Call Center, perform the initial setup, change a password, and obtain help.</td>
</tr>
<tr>
<td>Explore Workspace</td>
<td>This section provides an overview of the user interface.</td>
</tr>
<tr>
<td>Manage Calls</td>
<td>This section provides information on how to make and manage calls. This includes using your contacts to make calls or perform actions on existing calls.</td>
</tr>
<tr>
<td>Manage Call History</td>
<td>This section provides information on managing call logs.</td>
</tr>
<tr>
<td>E-mail Contacts</td>
<td>This section includes information on how to send e-mail messages to contacts.</td>
</tr>
<tr>
<td>Manage Contacts</td>
<td>This section provides information on managing contact directories and searching for contacts.</td>
</tr>
<tr>
<td>Monitor Supervisors</td>
<td>This section describes how agents can monitor the phone state of selected supervisors.</td>
</tr>
<tr>
<td>Monitor Call Centers</td>
<td>This section describes the Dashboard panel available to agents. The Dashboard panel allows agents to view key indicators about selected call centers they are staffing.</td>
</tr>
<tr>
<td>Generate Reports</td>
<td>This section describes how to generate and schedule reports.</td>
</tr>
<tr>
<td>Configure Call Center</td>
<td>This section describes the settings you can configure to set up and customize Call Center for improved usability.</td>
</tr>
<tr>
<td>Appendix A: Glossary and Definitions</td>
<td>This appendix contains definitions of terms used in Call Center.</td>
</tr>
<tr>
<td>Appendix B: Keyboard Shortcuts</td>
<td>This appendix describes the keyboard shortcuts available in Call Center.</td>
</tr>
</tbody>
</table>
### 1.3 Software Requirements

The software requirements include:

- Operating System currently supported by Microsoft and Apple, or Citrix XenApp 4 or 5
- Sun Microsystems 32-bit Java 6 Update 19 to Update 45, Runtime edition only
- Sun Microsystems 32-bit Java 7 Update 11 or later, Runtime edition only
- Microsoft Exchange 2007 SP3 or Microsoft Exchange 2010 SP1 – Required for Calendar Presence Integration
- Microsoft Excel (Optional)
- Flash Player 9 or 10.X Runtime (ActiveX Control)
- Internet Explorer 8.0, 9.0, or 10.0 (Compatibility View enabled); Firefox 3.6 through 25; Google Chrome 17.0.963.64 or later, or Safari 5

**Browser Javascript Requirements:**

Javascript must be enabled on Internet Explorer.

1. Open Internet Explorer
2. Click the **Tools** button.
3. From the drop-down list, select **Internet Options**.
4. Select the **Security** tab.
5. Select the **Internet Zone**.
6. Click the **Custom level...** button.
7. In the **Scripting category**, click the **Enable** button for the **Active Scripting** subcategory.
8. In the **Scripting category**, click the **Enable** button for the **Allow status bar updates via script** subcategory.
9. Click the **Yes** button when prompted with a message box asking, *Are you sure you want to change the settings for this zone?*
10. Click **OK** in the **Internet Options** dialog **Security** tab.
11. Close and restart Internet Explorer.

**NOTE:** Best practice recommends always using the latest available service pack/update for Windows, Max OS X, Internet Explorer, Firefox, Safari, and Outlook.

Internet Explorer 9.0 or higher (with Compatibility View enabled) is the recommended browser for best results with the Call Center client.
2 Introduction to Call Center

Hosted Call Center is a carrier-class, communications management product for Call Center agents and supervisors on which call centers are hosted.

Call Center delivers the following real benefits to users:

- Efficient call handling and automatic call distribution (ACD) state management by Call Center agents
- Integration of online directories with Click-To-Dial capability

Along with this focus on design, Call Center employs the latest technology platforms and communications facilities.

The Hosted Call Center is a Software as a Service (SaaS) Rich Internet Application (RIA) that allows you to manage call center activity from a web browser.

The Hosted Call Center client application herein is referred to as Call Center, Call Center client, Call Center application, or client.

The Call Center functionality available to you depends on the types of queues you are staffing or monitoring (Standard or Premium), and your own services and settings. For more information about the capabilities and services assigned to you, ask your group or enterprise administrator.

2.1 Call Center – Agent

The Call Center – Agent client is designed to support the needs of Call Center agents in any environment. It supports the full set of call handling functions, ACD state management, integration of multiple directories, Outlook integration, and other features required in large call centers.

*Figure 1* shows the main interface of the Call Center – Agent.

![Call Center – Agent Main Interface](image)
The interface contains the following work areas:

- **Logo pane** – The Logo pane displays information about you and contains links to other pages and functions.

- **Call Console** – You use the Call Console to view and manage your current calls.

- **Contacts pane** – The Contacts pane contains your contact directories, the list of your supervisors, and the list of the call centers to which you belong. It allows you to use your contacts to make and manage your calls.

- **Dashboard pane** – The Dashboard pane provides real-time summary information about up to 50 call centers selected from the list of call centers to which you are assigned.

- **Call History dialog box** – You use the Call History dialog box to view your past calls and make calls from history.

- **Report window** – You use the Report window, accessed via the Reporting link, to generate reports about your activity and performance in the call centers you are staffing.

- **Settings pages** – You use the Settings pages, accessed via the Settings link, to configure various aspects of Call Center.

For more information about the Call Center user interface, see section 4 Explore Workspace.

Call Center functionality available to agents is described in the following sections:

- **Getting Started**
- **Manage Calls**
- **Manage Call History**
- **E-mail Contacts**
- **Manage Contacts**
- **Monitor Supervisors**
- **Monitor Call Centers**
- **Generate Reports**
- **Configure Call Center**
Getting Started

Call Center allows users to access it over the network either from your web portal or from a web browser.

In addition, agents can sign in to Call Center using hot desk functionality, that is, sign in from any available desk configured for that purpose. Upon login, a desk’s phone is associated with a certain agent and behaves as if it were the permanent phone of the agent for the duration of the login session. This allows agents to use a single login ID to perform their work independently of their location.

**NOTE 1:** The minimum screen resolution required for the Call Center is 1024 x 768 pixels.

**NOTE 2:** Call Center does not support logging in as different users from the same machine at the same time.

**NOTE 3:** When using the Outlook Integration feature with Microsoft Outlook 2010 (32- or 64-bit edition), make sure Outlook is running before Call Center is launched; otherwise, the Outlook Integration functionality does not work.

**NOTE 4:** Java (minimum Version 7 Update 51) is required for some features to work. For best results it is recommended to access Call Center from Internet Explorer.

3.1 Launch Call Center from Web Portal

The Hosted VoIP Phone System has a Single Sign-On feature. When you access the Call Center client from the web portal, you do not need to provide your credentials since you are already logged in to the web portal.

**To launch Call Center:**

1) Log in to your Hosted VoIP Phone System web portal (https://admin.euserportal.com).

2) From the *Launch* drop-down list at the top right-hand side of the Telesystem logo pane, select the *Call Center* service. Call Center starts and you are automatically signed in.
3.2  Sign in from Web Browser

To sign in to the Call Center client, use the same credentials that you use to connect to the web portal.

To sign in to Call Center:

1) In your web browser, enter the Uniform Resource Locator (URL) of the Call Center client (https://app.euserportal.com/callcenter/). The Call Center Sign-in page appears.

![Call Center Sign-in Page]

Figure 2  Call Center Sign-in Page

2) Enter your user ID (10-digit phone number) and enter your password.

If you are unsure of your user ID or password, contact your administrator.

The system appends the default domain to it before authenticating you. However, if your domain is different from the default domain, you have to enter your user ID with the domain name.

Optionally, if your system has been configured to allow it, you can configure your domain name.

3) Check Stay signed in to instruct the client to automatically reconnect and sign in to the server when it detects a network connection.

This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost.

4) To configure your domain name or the Call Center language, click Show options. The area expands, displaying advanced options.
To configure your domain, in the Append Domain text box, enter your domain name. When you enter your user ID without a domain, the system appends the configured domain instead of the system-wide default domain.

6) To change the language, from the Language drop-down list, select a new language.

7) To add a bookmark to this page in your browser, click Bookmark this page and follow the instructions of your browser.

8) Click Sign In.

Call Center starts and you are signed in.

NOTE: In some browser/operating system combinations, when you press ENTER instead of the Sign In button, a blank page appears instead of the Call Center main interface.

3.3 Hot Desk Sign-in

Call Center agents can automatically associate themselves with a Hoteling Host phone device when you sign in to the Call Center client. This is commonly used in a shared workspace environment where users working different shifts share a single computer and phone.

To use hot desk functionality, you must have your Hoteling Guest service turned on. You turn on your Hoteling Guest service using the Hosted VoIP Phone System web portal or voice portal.

To sign in to Call Center as a hot desk user:

1) At the assigned workstation, start a web browser and enter the URL of the Call Center client. The Call Center Sign-in page appears.

2) Enter your Hosted VoIP Phone System user ID and password.

3) Click Show options. The area expands, displaying advanced options.

4) In the Hotel Host text box, enter the user ID of the Hoteling Host that corresponds to the desk/device you are using, for example, “station_224@acme.com”.

5) To change the language of the user interface, from the Language drop-down list, select a new language.

6) Click Sign In.

You are signed in and Call Center associates that desk's phone with your user account for the duration of the session.
NOTE 1: When you sign out from the Call Center client, the guest session with the host device at the desk is terminated. After sign-out, the host user ID you entered is saved and can be reused on the next sign-in.

NOTE 2: The host/guest association can be configured with a time limit. If the association/session expires while you are signed in to the client, you are automatically signed out from client. The association time limit is specified in either the Hoteling Host or Hoteling Guest service setup on the Hosted VoIP Phone System web portal.

3.4 Sign-in Restrictions

You can only have one active Call Center session at a time. When you sign in from a second location, you are automatically signed out from the original location with the following message: “You have been signed out as you have signed in from another location.”

![Sign-in Dialog Box with Error Message](image)

Figure 4 Sign-in Dialog Box with Error Message

![Main Interface (Top of Page) with Error Message](image)

Figure 5 Main Interface (Top of Page) with Error Message

3.5 Get Help

Call Center provides you with online access to a portable document format (PDF) version of this guide.

![Logo Pane with Help Link](image)

Figure 6 Logo Pane with Help Link

To access the document, click the Help link in the top right-hand side of the main interface.

3.6 Sign Out

1) To sign out of Call Center, click Sign Out at the top right-hand side of the main interface.

If you are the last agent to sign out of a call center, a message appears, providing the details of queues in which you are the last agent to sign out and asking you to confirm that you want to sign out.
NOTE: This functionality is not available when you close the application using the browser’s Close button or when you refresh (F5) the browser.

Figure 7 Dialog Box – Signing Out Last

2) To stay signed in, click No. You are returned to the application.
   - To continue signing out, click Yes.
     A message appears asking whether you would like to save your current workspace.

Figure 8 Dialog Box – Saving Workspace on Sign Out

   - To save your current workspace, click Yes. This allows you to retain the same interface setup at your next session. For information about the elements of the Call Center workspace that can be customized and retained between sessions, see section 12.1.7 Workspace.

If you are signing out from a hot desk, your account is dissociated from the hot desk where you were signed in.

3.7 Set Up Call Center

When you sign in to Call Center for the first time, it is recommended that you configure the following settings:

- Configure the queues you want to join on sign-in.

- Configure your post sign-in and post call ACD states.
  For information, see section 12.2 Settings – Application.

- Configure the supervisors whose call status you want to monitor. For information, see section 9.1 Select Supervisors to Monitor.

For more information about the settings you can configure in Call Center, see section 12 Configure Call Center.
3.8 Change Your Password

You can change your password when you are signed in to Call Center.

1) To change your password, click the Settings link at the top right-hand side of the main page.

2) Click the General tab and then click Change Password.

![Change Password GUI](image)

Figure 9 Changing Password

3) Enter your old and new password in the provided text boxes and click Change Password.

   Note that the Reset button does not reset your password. It only clears the input boxes.

   **NOTE:** This password is shared with your web portal and other client applications that share the Hosted VoIP Phone System Single Sign-On feature. It must meet the password requirements set by the administrator.

3.9 Change Your ACD State

When you sign in to Call Center, your ACD state is set to the post sign-in ACD state set on the Settings page.

To change your ACD state:

1) At the top right-hand side of the main window, select your ACD state from the ACD drop-down list.

![ACD State Control](image)

Figure 10 Logo Pane – ACD State Control

2) If you selected *Unavailable* and your company requires you to provide a reason for your unavailability, select an *Unavailable Code* from the drop-down list.

![Unavailable Codes](image)

Figure 11 Logo Pane – Unavailable Codes
3.10 Enable or Disable Services

You can use the following services in Call Center: Call Waiting, Call Forwarding Always, and Do Not Disturb, provided that your administrator has assigned the services to you.

**To enable or disable Call Waiting:**

1) In the Call Console, click Call Waiting. The button changes to indicate that the service is enabled.
2) To disable it, click the button again.

**To enable or disable Do Not Disturb or Call Forwarding Always:**

1) At the top right-hand corner of the main page, click Settings. The Settings page appears.
2) Click the Services tab.
3) On the Services page that appears, select the service you want to enable or disable, and check or uncheck the is Active box.
4) If you checked the is Active box for the Call Forwarding Always service, in the Forward To text box, enter the phone number to forward your call to.
5) Click Save.

For more information, see section 12 Configure Call Center.
4 Explore Workspace

When you sign in to Call Center, the main page appears where you perform most of your call management or monitoring tasks. In addition, the main page provides links to other pages and windows of Call Center, where you perform functions such as configuration and report generation.

Many visual aspects of the Call Center workspace are configurable. For example, you can change the size and placement of windows on the screen. You can then save your workspace and retrieve it the next time you sign in. For more information on saving your workspace settings, see section 12.1.7 Workspace.

NOTE 1: To work in full screen mode, make sure that the main window is in focus and then click F11.

NOTE 2: The Back, Forward, and Refresh operations of the web browser are not supported by Call Center, and if performed, the results are inconsistent.

NOTE 3: When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

Most call center controls are context-based, which means that they appear only when the action they represent can be taken. Context-based controls that allow you to take actions on calls are called action buttons. For the list of controls available in Call Center, see section 4.5 Controls. The action buttons are described in section 4.5.1 Call Action Buttons.
The Call Center interface contains the following elements:

<table>
<thead>
<tr>
<th>Interface Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logo Pane</td>
<td>Located at the top of the main interface, the Logo pane displays global messages, information about the logged user, and links to other Call Center interface elements and functions.</td>
</tr>
<tr>
<td>Call Console</td>
<td>The Call Console is where you manage your current calls.</td>
</tr>
<tr>
<td>Contacts Pane</td>
<td>The Contacts pane contains your contact directories and allows you to manage your contacts and use contacts to make calls or take actions, such as transfer to contact or queue, on existing calls.</td>
</tr>
<tr>
<td>Call History Window</td>
<td>The Call History window, accessible from the Call Console via the Call History button, displays your placed, received, and missed calls, and allows you to make calls from history and delete call logs.</td>
</tr>
<tr>
<td>Report Windows</td>
<td>The Report windows, accessible from the main page via the Reporting link, provide access to Enhanced Reporting, allowing you to generate, schedule, and view reports. Agents can only generate reports about themselves.</td>
</tr>
<tr>
<td>Dashboard Pane</td>
<td>The Dashboard pane allows you to view the current state of the monitored call centers.</td>
</tr>
<tr>
<td>Settings Pages</td>
<td>The Settings pages, accessible from the main page via the Settings link, allow you to configure various user-level and application settings.</td>
</tr>
<tr>
<td>Controls</td>
<td>You use controls, such as buttons and drop-down lists to execute actions on calls, contacts, queues, and so on.</td>
</tr>
</tbody>
</table>

This section describes the following elements of the Call Center interface:

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

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

- Queued Calls pane – Section Error! Reference source not found. Error! Reference source not found.
- Report windows – Section 11 Generate Reports
- Dashboard pane – Section 10 Monitor Call Centers
- Settings pages – Section 12 Configure Call Center

### 4.1 Logo Pane

The Call Center main window interface contains a logo pane that displays the Call Center client or company logo, global messages, links to other interface elements or Call Center functions, and information about the logged-in user.

Figure 13 Call Center Logo Pane
4.1.1 Global Message Area

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

4.1.2 Links to Other Interface Elements and Functions

The Logo pane displays links to the Report windows, Settings pages, and the Help and Sign Out links.

4.1.3 Logged User Information

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

- ACD state

In addition, information about the following services and features is provided:

- Do Not Disturb (DND)

- Call Forwarding Always (CFA)

- Busy phone state
4.2 Call Console

You use the Call Console to view and manage your current calls. For information on managing your calls, see section 5 Manage Calls.

The Call Console contains the following areas:

- Header Bar
- Dialer
- Current Calls
- Conference Call
4.2.1 Header Bar

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

Figure 15 Call Console Header Bar

The header bar can contain the following controls:

- Disposition Code button – This allows you to assign disposition codes to the last call. The button only appears when you are in Wrap-Up state.

- Call History button – This allows you to access the list of your previous calls.

- Auto Answer button – This allows you to enable or disable the automatic answering of calls.

- Call Waiting button – This allows you to enable or disable the Call Waiting service.

4.2.2 Dialer

The Dialer, located at the top of the Call Console, below the header bar, allows you to make ad hoc calls and set your outgoing calling line identity (CLID) for the next call.

Figure 16 Dialer

It contains the following elements:

- The Outbound CLID button, which allows you to configure the number you want to use for outgoing calls.

- The Enter Number text box, in which you enter the number to dial.

- Action buttons, which change depending on the context and allow you to perform operations on calls. For more information, see section 4.5.1 Call Action Buttons.
4.2.3 Current Calls

The Call Console displays your current calls, both direct and ACD, and allows you to take actions on them. Direct calls are calls placed from or received on your own phone number, whereas ACD calls are calls routed to you from a call center that you are staffing as an agent.

If you are involved in a conference call, its details are displayed in a separate area of the Call Console, called the Conference Call panel. The Conference Call panel is described in the following section.

![Call Console – Current Calls](image)

The following information is displayed for each call:

- **Call State icon** – This is a visual representation of the current state of the call. For more information, see section 4.2.5 Call States and Actions.
- **Remote CLID** – This is the name of the remote party (if available) and the phone number in parenthesis.
- **Call State name** – This is the display name of the “call” state the call is currently in.
- **Call duration [Held duration]** – This is the duration of the call from the time the call was received from the Hosted VoIP Phone System and it reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is displayed.

The call entry also displays action buttons for the operations that you can currently take on that call. The actions you can perform depend on the state of the call.

For the list of Call Center action buttons, see section 4.5.1 Call Action Buttons and for the list of actions that can be taken in each call state, see section 4.2.5 Call States and Actions.

4.2.4 Conference Call

The Conference Call panel displays your current conference and allows you to manage your conference calls.

**NOTE:** You can only be involved in one conference call at a time.

![Conference Call](image)
The header bar contains various controls that allow you to manage the conference:

- **End Conference button** – This allows you to end the current conference.
- **Leave Conference button** – This allows you to leave the conference.
- **Hold Conference button** – This allows you to place the conference on hold.
- **Resume Conference button** – This allows you to resume the conference that you previously placed on hold.

The Conference Call panel, when expanded, lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for two-way calls. For information, see section 4.2.3 *Current Calls*.

For information on managing conferences, see section 5.10 *Manage Conference Calls*.

### 4.2.5 Call States and Actions

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

<table>
<thead>
<tr>
<th>Call State</th>
<th>Display Name</th>
<th>Display Icon</th>
<th>Call Personality</th>
<th>Call Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ringing In (Local)</td>
<td>Incoming Local</td>
<td>🔄</td>
<td>Click-To-Dial</td>
<td>Answer, End</td>
</tr>
<tr>
<td>Ringing In (Remote)</td>
<td>Incoming</td>
<td>🔄</td>
<td>Terminator</td>
<td>Answer, Conference, End</td>
</tr>
<tr>
<td>Ringing Out, Outgoing</td>
<td>Outgoing</td>
<td>🔄</td>
<td>Originator</td>
<td>Conference, End</td>
</tr>
<tr>
<td>Active</td>
<td>Active</td>
<td>🔄</td>
<td>Any</td>
<td>Transfer, Hold, End, Conference</td>
</tr>
<tr>
<td>On Hold</td>
<td>Held</td>
<td>🔄</td>
<td>Any</td>
<td>Transfer, Resume, End, Conference</td>
</tr>
<tr>
<td>On Hold (Remote)</td>
<td>Remote Held</td>
<td>🔄</td>
<td>Any</td>
<td>Transfer, Hold, End, Conference</td>
</tr>
<tr>
<td>Active (In Conference)</td>
<td>Active</td>
<td>🔄</td>
<td>Conference</td>
<td>Transfer, Hold, End</td>
</tr>
<tr>
<td>Held (In Conference)</td>
<td>Held</td>
<td>🔄</td>
<td>Conference</td>
<td>Resume, Transfer, End</td>
</tr>
<tr>
<td>Ringing In (Recalled Call)</td>
<td>Call Recalled</td>
<td>🔄</td>
<td>Terminator</td>
<td>Answer, Conference, End</td>
</tr>
</tbody>
</table>

**NOTE:** If a Trace option is required please call Telesystem directly. Due to legal regulations a subpoena may be required to obtain these records.

### 4.3 Contacts Pane

The Contacts pane contains your contact directories and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see section 5 *Manage Calls*. 
For information about organizing and managing your contact directories, see section 8 Manage Contacts.

The Contacts pane contains the following panels:

- Search Panel
- Enterprise/Group Panel
- Common Panel
- Supervisors Panel
- Speed Dial Panel
- Queues Panel
- Custom Directories Panels
- Outlook Panel
- Directories Panel

The contact directories you have access to depend on your system configuration as well as the services assigned to you. For more information, contact your administrator.

The directories you see in the Contacts pane also depend on your setup. For information on selecting the directories to display in the Contacts pane, see section 8.1.1 Show or Hide Directories.
When you click a contact, the entry expands and the contact’s information, such as phone numbers and the action buttons for the operations that you can currently take on that contact appear.

You can only view the details of one contact per directory at a time. When you click another contact in the same directory, the details of the currently expanded contact are automatically hidden.

Figure 20  Group Panel – Contact in Focus with Action Buttons

For the list of Call Center action buttons, see section 4.5.1 Call Action Buttons.

4.3.1 Search Panel

You use the Search panel to look for specific contacts in your contacts’ directories and, if available, in the configured LDAP directory. For information about performing contact searches, see section 8.3 Search for Contacts.

Figure 21  Contacts Pane – Search Panel
4.3.2 Enterprise/Group Panel

The Enterprise/Group panel contains the contacts in your group directory (if your group is part of a service provider) or enterprise directory (if your group is part of an enterprise. However, if your enterprise administrator restricted your access to the enterprise directory, you can only see the contacts from your group.)

![Group Panel](image)

Figure 22 Contacts Pane – Group Panel

4.3.3 Common Panel

The Common directory contains the contacts in your group's common phone list configured by your administrator on the Hosted VoIP Phone System Admin web portal.

![Common Panel](image)

Figure 23 Contacts Pane – Common Panel

4.3.4 Personal Panel

The Personal panel contains the contacts from your Hosted VoIP Phone System Personal Phone List. It displays the name/description and phone number of each contact.

For information about managing your personal contacts, see section 8.4 Manage Personal Contacts.

![Personal Panel](image)

Figure 24 Contacts Pane – Personal Panel
### Supervisors Panel

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

![Supervisors Panel](image)

Selected supervisors have their call status displayed. For more information, see section 9 Monitor Supervisors.

### Speed Dial Panel

The **Speed Dial panel** allows you to manage your Speed Dial 8 and Speed Dial 100 contacts. It is available to users who have been assigned Speed Dial 8 and/or Speed Dial 100 services. If you only have one of these services, you only see the entries for that service in your Speed Dial directory.

For each configured speed dial number, Call Center displays the speed dial code and description. The description is what you entered when configuring the number.

For information about managing your Speed Dial directory in Call Center, see section 8.5 Manage Speed Dial Numbers.

![Speed Dial Panel](image)

### Queues Panel

The **Queues panel** lists the call centers you are staffing as an agent and the associated Dialed Number Identification Service (DNIS) numbers. The primary purpose of this panel is to provide you with a quick way to transfer calls to queues.

![Queues Panel](image)
4.3.8 Custom Directories Panels

If your administrator has configured custom contact directories for your group, you can access them from Call Center. A custom directory contains a subset of the contacts in your Hosted VoIP Phone System group or enterprise directory.

NOTE: A custom directory has the same properties as the Group/Enterprise directory.

![Custom Directory Example]

Figure 28 Contacts Pane – Custom Panel

4.3.9 Outlook Panel

The Outlook panel contains your Outlook contacts. This panel is available to you if you have the Outlook Integration service assigned.

![Outlook Contact Example]

Figure 29 Contacts Pane – Outlook Panel

NOTE: If Outlook contacts are not loading, log out of Call Center and clear your browser’s cache. Then log back into Call Center and then refresh the page.
4.3.10 Directories Panel

The Directories panel consolidates the contacts from the following directories: Enterprise/Group, Custom, Personal, Outlook, and Speed Dial. This panel is always visible. You can choose which directories to display in the Directories panel and you can collapse the panel, but you cannot close it.

You can also place a copy of a directory below the Call Console. This allows you to view more than one directory at a time easily. For more information, see section 8 Manage Contacts.

<table>
<thead>
<tr>
<th>DIRECTORIES</th>
<th>Show all</th>
</tr>
</thead>
<tbody>
<tr>
<td>GROUP</td>
<td></td>
</tr>
<tr>
<td>Valdez, Gregorio</td>
<td></td>
</tr>
<tr>
<td>Richard, Jean</td>
<td></td>
</tr>
<tr>
<td>Wyoming, Madeline</td>
<td></td>
</tr>
<tr>
<td>Dumas, Marie</td>
<td></td>
</tr>
<tr>
<td>Bueno, Mario</td>
<td></td>
</tr>
<tr>
<td>Maldini, Paolo</td>
<td></td>
</tr>
<tr>
<td>PERSONAL</td>
<td></td>
</tr>
<tr>
<td>SPEED DIAL</td>
<td></td>
</tr>
<tr>
<td>#11 Pizza Pizza</td>
<td></td>
</tr>
<tr>
<td>2 Greg</td>
<td></td>
</tr>
<tr>
<td>3 Daycare</td>
<td></td>
</tr>
</tbody>
</table>
4.4 Call History

The Call History dialog box, accessed from the Call Console via the Call History button, allows you to view your past calls. You can place a call to a number from Call History and manage call logs. For information on making calls from Call History, see section 5 Manage Calls, and for information on managing your call logs, see section 6 Manage Call History.

![Call History Dialog Box](image)

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

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

When you click a call log, the Call Action button appears, allowing you to place a call to the remote party.

![Call History Dialog Box – Call Log with Call Action Button](image)

For the list of action buttons available in Call Center, see section 4.5.1 Call Action Buttons.
4.5 Controls

Call Center controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you enter a number or select a contact, a Dial button appears, allowing you to place a call. The contextual controls that correspond to call operations such as dialing, transferring calls, or putting calls on hold are called action buttons. They appear on the Dialer, in a call entry, in a directory entry (contact), or in a call log.

The following table lists the general controls available for Call Center and the controls that may be displayed on the headers in the panels. Configurations for Call Center may vary for each organization. For more information on the action buttons, see section 4.5.1 Call Action Buttons.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Common Controls</strong></td>
<td></td>
</tr>
<tr>
<td>Options</td>
<td>This is located in the upper-right corner of a pane or page. When clicked, it displays a drop-down menu of options that control the display of information in that pane/page. The available options depend on the context.</td>
</tr>
<tr>
<td>Expand/Collapse</td>
<td>This shows or hides the contents of a window or panel.</td>
</tr>
<tr>
<td>Close</td>
<td>This closes an interface element, such as window, pane, or panel.</td>
</tr>
<tr>
<td>Edit</td>
<td>This allows you to edit a list of items, such as agents to monitor or speed dials.</td>
</tr>
<tr>
<td><strong>Logo Bar, Dialer, Call Console, Directories Panel, and Search Panel Controls</strong></td>
<td></td>
</tr>
<tr>
<td>Web Pop URL</td>
<td>This opens a page in your browser at the configured URL to provide additional information about the caller.</td>
</tr>
<tr>
<td>Outbound CLID</td>
<td>This allows you to select the phone number to use as your Calling Line ID for the next outgoing call.</td>
</tr>
<tr>
<td>Disposition Code</td>
<td>This allows you to apply one or more disposition codes to the last call when you are in Wrap-Up.</td>
</tr>
<tr>
<td>Disposition</td>
<td>This allows you to apply one or more disposition codes to the selected call.</td>
</tr>
<tr>
<td>ACD State</td>
<td>This displays your current ACD state and allows you to change it.</td>
</tr>
<tr>
<td>Call History</td>
<td>This displays Call History.</td>
</tr>
<tr>
<td>Auto Answer</td>
<td>This allows you to turn Auto Answering on or off.</td>
</tr>
<tr>
<td>Call Waiting</td>
<td>This allows you to turn Call Waiting on or off. It is available only if you have been assigned the Call Waiting service.</td>
</tr>
<tr>
<td>End Conference</td>
<td>This ends a conference call.</td>
</tr>
<tr>
<td>Leave Conference</td>
<td>This disconnects you from the conference while allowing other participants to continue the call.</td>
</tr>
<tr>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Hold Conference</td>
<td>This holds the conference call.</td>
</tr>
<tr>
<td>Resume Conference</td>
<td>This resumes a held conference.</td>
</tr>
<tr>
<td>Pull Out Directory</td>
<td>This places a selected directory below the Call Console.</td>
</tr>
</tbody>
</table>

**Call Notification Pop-up Window**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Pop URL</td>
<td>This opens a page in your browser at the configured URL to provide additional information about the caller.</td>
</tr>
<tr>
<td>vCard</td>
<td>This saves the caller’s phone number and personal information as a vCard in Microsoft Outlook. It appears only when Outlook is running.</td>
</tr>
</tbody>
</table>

**Supervisors Panel**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency</td>
<td>This makes an emergency call to a supervisor.</td>
</tr>
<tr>
<td>Escalate</td>
<td>This escalates a call to a supervisor.</td>
</tr>
</tbody>
</table>

**Scheduled Reports Window**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load Report</td>
<td>This loads a scheduled report, allowing you to view and modify it.</td>
</tr>
<tr>
<td>Delete Report</td>
<td>This deletes a scheduled report.</td>
</tr>
</tbody>
</table>
4.5.1 Call Action Buttons

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, on a call line, in a call history log, or in a directory entry.

Action buttons are contextual, that is, they appear on a line/entry when the corresponding action can be performed on that entry.

For example, when you click a contact in the Group directory, the contact expands and the Call and Extension buttons appear on the line for that contact, allowing you to call the contact. This is illustrated in Figure 33. Note that other buttons may appear on the line for a contact, depending on the call state and the contact’s configuration.

The following table lists the action buttons available in Call Center. The availability of each button is dependent on the Call Center configuration specific to your organization.

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dial</td>
<td>This dials the number you entered in the Dialer.</td>
</tr>
<tr>
<td>Call</td>
<td>This places a call to the selected contact or to a number from Call History.</td>
</tr>
<tr>
<td>Redial</td>
<td>This redials the last dialed number.</td>
</tr>
<tr>
<td>Extension</td>
<td>This dials the contact’s extension.</td>
</tr>
<tr>
<td>Mobile</td>
<td>This dials the contact’s mobile number.</td>
</tr>
<tr>
<td>E-mail</td>
<td>This brings up a new e-mail message window with the contact’s e-mail address, allowing you to send a message to the contact.</td>
</tr>
<tr>
<td>Transfer</td>
<td>This button transfers a call to an ad hoc number entered in the Dialer.</td>
</tr>
<tr>
<td>Transfer</td>
<td>This transfers a call to a selected number or contact.</td>
</tr>
<tr>
<td>Button</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Answer</td>
<td>This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.</td>
</tr>
<tr>
<td>Hold</td>
<td>This places a call on hold.</td>
</tr>
<tr>
<td>End</td>
<td>This ends a call.</td>
</tr>
<tr>
<td>Conference</td>
<td>This establishes a conference call or adds a call to a conference.</td>
</tr>
<tr>
<td>Camp</td>
<td>This camps a call on a busy contact.</td>
</tr>
<tr>
<td>Escalate Call</td>
<td>This escalates a call to a selected supervisor.</td>
</tr>
<tr>
<td>Emergency Call</td>
<td>This places an emergency call to a selected supervisor.</td>
</tr>
<tr>
<td>Web Pop URL</td>
<td>This opens a page in your browser at the configured URL to provide additional information about the caller.</td>
</tr>
<tr>
<td>Delete Call Log</td>
<td>This deletes a call log from Call History.</td>
</tr>
</tbody>
</table>
5 Manage Calls

This section describes the operations you can perform to make and manage calls.

Your current calls are displayed in the Call Console with the calls currently involved in a conference displayed in a separate panel called Conference Call.

NOTE: You can only be involved in one conference at a time.

Figure 34 Call Console

The following subsection provides a quick reference to call management operations. These operations are described in detail in the rest of this section.

NOTE: For operations on calls that involve a contact, you can drag the call onto the contact and click the button for that contact, which corresponds to the operation you want to perform. For information, see 5.2 Drag and Drop Call onto Contact.
## 5.1 Call Management Operations Quick Reference

The following table provides a summary of the actions that you can take to manage calls. These actions (operations) are described in more detail in the following sections. The availability of the actions is dependent on the configuration of your organization’s Call Center.

<table>
<thead>
<tr>
<th>Function</th>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign Disposition Code to Selected ACD Call</td>
<td>In the Call Console, click the target ACD call and select a code from the drop-down list that appears.</td>
</tr>
<tr>
<td>Assign Disposition Code while in Wrap-Up</td>
<td>In the Call Console, click the Disposition Code button and select a code from the list. The code is applied to the last released call.</td>
</tr>
<tr>
<td>Answer Incoming Call</td>
<td>In the Call Console, click Answer for the target call.</td>
</tr>
<tr>
<td>Turn Auto Answer On</td>
<td>In the Call Console, click Auto Answer.</td>
</tr>
<tr>
<td>Open URL</td>
<td>In the Notification dialog box for an incoming call or on any call in the Call Console, click the Web Pop URL button.</td>
</tr>
<tr>
<td>Save a vCard</td>
<td>In the Call Notification dialog box for an incoming call, click the Add vCard button.</td>
</tr>
<tr>
<td>Place Call on Hold</td>
<td>In the Call Console, move the mouse over the call and click Hold.</td>
</tr>
<tr>
<td>Resume Held Call</td>
<td>In the Call Console, move the mouse over the call and click Retrieve.</td>
</tr>
<tr>
<td>Blind Transfer Call</td>
<td>Drag the call onto the target contact and click Transfer for that contact. Alternatively, enter the target number in the Dialer and click Transfer on the Dialer.</td>
</tr>
<tr>
<td>Transfer with Consultation</td>
<td>While on the call, enter a number in the Dialer or select a contact in the Contacts pane and click Dial.</td>
</tr>
<tr>
<td></td>
<td>When the new call is connected, consult with the party.</td>
</tr>
<tr>
<td></td>
<td>When ready to transfer, select the original call.</td>
</tr>
<tr>
<td></td>
<td>Move the mouse over the new call that is not selected call and click Transfer.</td>
</tr>
<tr>
<td>Transfer to Queue</td>
<td>Drag the call onto the target queue in the Queues panel and click Transfer for that queue.</td>
</tr>
<tr>
<td>Make Emergency Call to Available Supervisor</td>
<td>In the Call Console, select the call to escalate and click the Emergency button in the Supervisors panel.</td>
</tr>
<tr>
<td>Make Emergency Call to Selected Supervisor</td>
<td>Drag the call to escalate onto an available supervisor in the Supervisors panel and click Emergency for that supervisor.</td>
</tr>
<tr>
<td>Blind Escalate Call</td>
<td>In the Call Console, select the call to escalate.</td>
</tr>
<tr>
<td></td>
<td>In the Supervisors panel, click Escalate or click an available supervisor and click Escalate for that supervisor.</td>
</tr>
<tr>
<td></td>
<td>In the Call Console, move the mouse over the call to the supervisor and click Transfer before the supervisor answers the call.</td>
</tr>
<tr>
<td>Escalate with Consultation</td>
<td>In the Call Console, select the call to escalate.</td>
</tr>
<tr>
<td></td>
<td>In the Supervisors panel, click Escalate or click an available supervisor and click Escalate for that supervisor.</td>
</tr>
<tr>
<td></td>
<td>Consult with the supervisor.</td>
</tr>
<tr>
<td></td>
<td>When ready to transfer, in the Call Console, move the mouse over the call to the supervisor and click Transfer.</td>
</tr>
<tr>
<td>Escalate with Conference</td>
<td>In the Call Console, select the call to escalate.</td>
</tr>
<tr>
<td></td>
<td>In the Supervisors panel, click Escalate or click an available supervisor and click Escalate for that supervisor.</td>
</tr>
<tr>
<td></td>
<td>In the Call Console, move the mouse over the new call and click Conference.</td>
</tr>
<tr>
<td>Function</td>
<td>Steps</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Start Three-Way Conference</td>
<td>In the Call Console, select a call. Move the mouse over a call that is not selected and click Conference.</td>
</tr>
<tr>
<td>Add Participant to Conference</td>
<td>In the Call Console, move the mouse over a call and click Conference.</td>
</tr>
<tr>
<td>Hold Conference</td>
<td>In the Conference Call panel, click Hold.</td>
</tr>
<tr>
<td>Resume Conference</td>
<td>In the Conference Call panel, click Resume.</td>
</tr>
<tr>
<td>Hold Conference Participant</td>
<td>In the Conference Call panel, select the call to put on hold and click Hold for that call.</td>
</tr>
<tr>
<td>Take Conference Participant Off Hold</td>
<td>In the Conference Call panel, select a held call and click Resume for that call.</td>
</tr>
<tr>
<td>Leave Conference</td>
<td>In the Conference Call panel, click Leave Conference.</td>
</tr>
<tr>
<td>End Participant</td>
<td>In the Conference Call panel, select the target call and click End.</td>
</tr>
<tr>
<td>End Conference</td>
<td>In the Conference Call panel, click End Conference.</td>
</tr>
<tr>
<td>Set Outbound CLID</td>
<td>In the Dialer, click the Outbound CLID button and select the number to use as your calling line identity for the next call from the list.</td>
</tr>
<tr>
<td>Dial Ad Hoc Number</td>
<td>In the Dialer, enter the number to call and click Dial.</td>
</tr>
<tr>
<td>Re-dial Recent Number</td>
<td>In the Dialer, click Redial and select a number from the list.</td>
</tr>
<tr>
<td>Dial Recent Number</td>
<td>In the Dialer, start entering the number to dial. A list of numbers starting with the entered digits appears. Select a number from the list and click Dial.</td>
</tr>
<tr>
<td>Dial Contact</td>
<td>In the Contacts pane, click the contact and then click Call for that contact.</td>
</tr>
<tr>
<td>Dial from History</td>
<td>In the Call Console, click the Call History button. Select Missed calls, Received calls, or Dialed calls from the drop-down list. In the Call History dialog box, move the mouse over a call log and click Call.</td>
</tr>
<tr>
<td>Dial from Search</td>
<td>In the Search panel, select a contact and click Dial.</td>
</tr>
</tbody>
</table>
5.2 Drag and Drop Call onto Contact

In Call Center, you can drag a call from the Call Console and drop it on a target contact in one of your contact directories. This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green icon is displayed. When the call is dropped onto a contact, no action is taken on the call. The target contact expands and you can select the action button for the operation you want to perform on that call.

![Dragging Call and Dropping on Contact](image)

5.3 View Calls

You can view your current calls and your past calls (Call History). For information about Call History, see section 6 Manage Call History.

5.3.1 View Current Calls

Your current calls are displayed in the Call Console with the calls involved in a conference displayed in a separate pane called Conference Call.

![Call Console – View Current Calls](image)
5.3.2 View Incoming Call Details

When the Call Notification feature is enabled, a Call Notification pop-up window appears on top of the system tray when you receive an inbound call.

- For calls to your direct number or extension, the following information is displayed:
  - Calling party name
  - Calling party number

![Call Notification Pop-up Window for Call that is Not ACD Call](image1)

- For calls from a call center, the following information is displayed:
  - Calling party name
  - Calling party number
  - Call center name or DNIS name, followed by the time the call has been waiting in queue (wait time)
  - Number of calls in queue (queued calls)

![Call Notification Pop-up Window for ACD Call](image2)

**NOTE 1:** You must have only one tab open in the browser running Call Center to receive call notifications.

**NOTE 2:** If calls come within eight seconds of each other, the Call Notification pop-up window only appears for the first call of that series.

**NOTE 3:** If the Call Notification pop-up window is still not appearing update the current version of Java on the local computer.
5.4 Assign Disposition Codes (Premium Call Center)

Disposition codes are additional attributes that can be applied to ACD calls to tag calls with comments, results, and so on. More than one disposition code can be assigned to a call.

You can assign disposition codes to current ACD calls or to the latest released ACD call while you are in the Wrap-Up state.

5.4.1 Assign Disposition Codes to Current Call

To assign a disposition code to a current call:

1) From the Call Console, select the call and click it. The call line displays the Disposition drop-down list.

![Call Console – Assigning Disposition Code to Active Call](image)

2) From the list, select a code.

5.4.2 Assign Disposition Codes in Wrap-Up

While you are in Wrap-Up, you can assign disposition codes to the last released ACD call.

To assign a disposition code to the last released call:

1) In the Call Console, click Disposition Code.

2) From the drop-down list that appears, select a code.

![Call Console – Assigning Disposition Code in Wrap-Up](image)

5.5 Receive, Answer, and End Calls

You can answer calls manually or have your phone automatically answer incoming calls.

5.5.1 Answer Call

**NOTE:** When using the Remote Office service, the Answer button is disabled.

To answer a ringing call:

Click Answer for that call.
To answer an incoming call from a Call Notification pop-up window:
Click anywhere on the text in the pop-up window.

### 5.5.2 Auto Answer Calls

This feature is typically used by agents who use headsets with their phones and take care of a high volume of calls. It may be enabled either by you in the client or configured in the system by your administrator.

**NOTE:** Auto Answer only works if your device is compliant with Advanced Call Control (ACC).

To answer calls automatically:

In the Call Console, click **Auto Answer**. The button changes to this to indicate that Auto Answer is on.

When Auto Answer is enabled, your phone automatically goes off-hook when it is alerted. This applies to both inbound and Click-To-Dial calls.

The Auto Answer feature may be enabled manually in the Call Center client or by the administrator in the Hosted VoIP Phone System Admin Portal.

**NOTE:** If this feature is enabled by your administrator, you must not enable the client-based Auto Answer using the Auto Answer button.

### 5.5.3 Open URL

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

This feature is configured on the Settings – General configuration page. For more information, see section 12.1.4 Screen Pop.

**To open a URL for an incoming call:**

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

**To open a URL for any call:**

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

### 5.5.4 Save vCard

When you receive a call, a Call Notification pop-up window appears on top of the system tray. You can click a button in this window to save the caller's phone number and personal information as a vCard in Microsoft Outlook.

**To save a vCard:**

In the Call Notification pop-up window, click the **Add vCard** button. This button is only present when Outlook is running.
5.5.5 End Call

To end a call:

Click End for that call.

5.6 Make Outbound Calls

You can make calls to an ad hoc number, to a contact from any of your contacts’ directories, or to a number from Call History. You can also specify the calling line identity to use for your outbound calls.

5.6.1 Set Your Outgoing Calling Line Identity (Premium Call Center)

As a Call Center agent, you can specify whether your direct number or a DNIS number assigned to one of your call centers should be used as your calling line identity when you make calls. This allows you to conduct outbound calling campaigns with an appropriate calling line identity presented to the called party.

To set your outgoing call identity for the next call:

In the Dialer, click the Outbound CLID button and select the number from the drop-down list. The number you select is displayed as your CLID when you make the next call.

Figure 41 Dialer – Setting Outbound CLID

For information on permanently setting your outbound CLID, see section 12.2.2 Agent Policies.

5.6.2 Dial Ad Hoc Number

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

To dial an ad hoc number:

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

Call Center keeps up to ten most recently dialed numbers, which you can redial using the Dialer.

To redial one of the recently dialed numbers:

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

![Figure 43 Dialer – Select Recently Dialed Number](image)

2) Select the number to dial and click **Dial**.

   The client issues a Click-To-Dial attempt to the selected number.

   Alternatively, click the **Redial** button and select the number from the list that appears.

![Figure 44 Dialer – Redialing Number](image)

5.6.4 Dial Contact

You can use any directory in the Contacts pane to dial a contact.

To dial a contact:

1) In the Contacts pane, expand the directory from which you want to dial a contact.

2) Click the target contact to expand it and click **Call** for that contact.

![Figure 45 Group Panel – Expanded Contact with Action Buttons](image)

   Alternatively, to dial the contact's extension, click **Extension** or to dial the contact's mobile number, click **Mobile**.

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

You use the Search panel in the Contacts pane to search for contacts in your contacts’ directories. For more information, see section 8.3 Search for Contacts.

To dial a number from search:

1) Perform a search.

2) Click the target contact to expand it and then click Call .

![Figure 46 Dial From Search](image)

5.6.6 Dial from History

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

To dial from Call History:

1) In the Call Console, click Call History . The Call History dialog box appears.

2) From the Show drop-down list, select Missed Calls, Received Calls, or Placed Calls.

3) Click the call log from which you want to dial and then click the Call button.
5.7 Place Calls on Hold, Resume, and Camp Calls

You can only put an active call on hold.

NOTE: When using the Remote Office service, the Hold/Resume buttons are disabled.

5.7.1 Place Call on Hold

To place a call on hold:

Click Hold for the target call.

5.7.2 Resume Held Call

To resume a held call:

Click Answer for the target call.

5.7.3 Conduct Busy Camp On

Busy Camp On allows you to find a temporary parking place for a call by placing the call on hold for a busy contact. The call is automatically transferred to the destination when the contact becomes available. A call to camp must be active or held and the destination contact’s phone state must be either Busy or Ringing.

If the camped call is not answered within the predefined time, the call is recalled and reappears in your Call Console.

Agents can camp calls on monitored contacts in their Supervisors directory and supervisors can camp calls on monitored contacts in their Agents directory. For information on monitoring supervisors, see section 9 Monitor Supervisors.

To camp a call on a busy contact:

1) From the Call Console, select an active or held call.

2) In your Supervisors directory, select the contact to camp the call on. The contact’s phone state must be Busy or Ringing.

3) Move the mouse over the contact and click Camp. Once the call is camped, it is removed from the Call Console.

If the camped call timer expires before the call is answered, the call reappears in the Call Console.

5.8 Transfer Calls

There are a number of ways in which you can transfer a call, including blind transfer, transfer with consultation, and transfer to queue.

5.8.1 Blind Transfer

Use this method to transfer a call to another number without providing an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

To blind transfer a call to an ad hoc number:

1) From the Call Console, select the call to transfer.
2) In the Dialer, enter the destination number and click **Transfer**. The call is transferred and removed from the Call Console.

To blind transfer a call to a contact:
1) From the Call Console, select the call to transfer.
2) In the Contacts pane, expand the directory from which you want to select a contact.
3) Click the destination contact and click **Transfer** for that contact. The call is transferred and removed from the Call Console.

### 5.8.2 Transfer with Consultation
Use this method to transfer a call with an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

To transfer a call with consultation:
1) Make a call to the person to whom you want to transfer the call. If the first call was active, it is put on hold.
2) Wait until the called party accepts your call and speak to the party.
3) When ready to transfer, from the Call Console, select one of the two calls.
4) Move the mouse over the call that is not selected and click **Transfer**. The calls are connected and removed from the Call Console.

### 5.8.3 Transfer to Queue
You can transfer a call back to a queue. A transferred call is placed at the bottom of the queue.

To transfer a call to a queue:
1) From the Call Console, select the call to transfer.
2) In the Contacts pane, expand the Queues panel.
3) Click the destination queue and click **Transfer** for that queue.
   The call is transferred to the selected queue and removed from the Call Console.

Alternatively, drag the call onto the target queue and click **Transfer** for that queue.
5.9 Escalate Calls

You can escalate calls to the first available supervisor or to a specific supervisor. You can also make an emergency call, which quickly conferences an available supervisor into your call, without placing the remote party on hold.

You use the Supervisors panel located in the Contacts pane to escalate calls.

5.9.1 Make Emergency Call

Use this method to escalate a call to a supervisor in an emergency situation. When you make an emergency call, the caller is not placed on hold; instead, a supervisor is immediately conferenced in to the call. You can let Call Center select the supervisor or you can select the supervisor yourself.

**NOTE:** To make emergency calls, you must have the Three-Way Call or N-Way Call service assigned.

To make an emergency call to an available supervisor:

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

![Supervisors Panel – Making Emergency Calls](image)

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

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

![Conference Call Panel – Leave Conference](image)

To make an emergency call to a specific supervisor:

1) While on a call, expand the Supervisors panel.

2) Click the target supervisor and click the Emergency button for that supervisor. Make sure the supervisor you selected is available.

Alternatively, drag the call onto the target supervisor and click the Emergency button for that supervisor.

This places the call to the selected supervisor. When the supervisor answers the emergency call, a Three-Way call or an N-Way call is started, without putting the caller on hold.
3) To transfer the call to the supervisor, click LEAVE in the Conference Call panel after the conference is established.

5.9.2 Blind Escalate Call

Use this method to escalate a call to a supervisor without consulting the supervisor. You can escalate a call to the first available supervisor or select the supervisor yourself.

To blind escalate a call:

1) In the Supervisors panel, click Escalate to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click the Escalate button for that supervisor. Your original call is placed on hold and a call to the supervisor is initiated.
2) Without waiting for the supervisor to answer, in the Call Console, select the original call.
3) Move the mouse over the call to the supervisor and click Transfer.

5.9.3 Escalate with Consultation

Use this method to escalate a call to a supervisor and provide an introduction beforehand. You can escalate the call to the first available supervisor or select the supervisor yourself.

To escalate a call with consultation:

1) In the Supervisors panel, click Escalate to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click Escalate for that supervisor.
2) Wait until the supervisor accepts your call and speak to the supervisor.
3) When ready to transfer the call, in the Call Console, select the original call.
4) Move the mouse over the call to the supervisor, and click Transfer.

5.9.4 Escalate with Conference or Handover

Use this method to escalate a call to a supervisor through a conference call. You can then leave the call.

To escalate a call with conference or handover:

1) In the Supervisors panel, click Escalate to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click Escalate for that supervisor.
2) When the supervisor accepts your call, speak to the supervisor about the issue.
3) In the Call Console, select the original call.
4) Move the mouse over the call to the supervisor and click Conference. A conference call is established and the calls appear in the Conference Call panel.
5) To hand the call over to the supervisor, click Leave Conference in the Conference Call panel.
5.9.5 Escalate with Mid-Conference Hold

Use this method to escalate a call to a supervisor through a conference call and provide an opportunity for the customer to speak to the supervisor.

**To escalate a call with mid-conference hold:**

1) In the **Supervisors** panel, click **Escalate** to let the system select a supervisor; or, to select the supervisor yourself, click an available supervisor and click **Escalate** for that supervisor.

2) When the supervisor accepts your call, speak to the supervisor about the issue.

3) In the **Call Console**, select the original call.

4) Move the mouse over the call to the supervisor and click **Conference**. A conference call is established and the calls appear in the **Conference Call** panel.

5) In the **Conference Call** panel, click **Hold Conference**. This puts both calls on hold but allows the customer and the supervisor to continue their conversation.

6) To drop a specific party from the conference, select their call from the **Conference Call** panel and click **End**.

7) To leave the call, click **Leave Conference** in the **Conference Call** panel.

5.10 Manage Conference Calls

You manage conferences in the **Call Console**. You use the:

- Current calls area to establish a conference and add participants to it.
- **Conference Call** panel to manage or end an active conference call.

You can only have one active conference at a time.

![Conference Call Panel](image)

Figure 50 Call Console – Conference Call Panel

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

To start a conference call, you must have at least two current calls. The calls can be received or made by you. If required, make calls using any of the methods described in section 5.6 Make Outbound Calls.

To start a conference:
1) In the Call Console, select a call.

2) Move the mouse over a call that is not selected and click Conference. A Three-Way Conference is established and the connected calls appear in the Conference Call panel.

5.10.2 Add Participant to Conference

NOTE: To add participants to a conference, you must have the N-Way Calling service assigned.

To add a participant to a conference:
1) If the call you want to add to the conference is not yet established, place the call.

2) In the Call Console, move the mouse over the call and click Conference. The call is added to the conference.

5.10.3 Hold Conference

To put an active conference on hold:

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

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

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

5.10.5 Hold Participant

To put a specific conference participant on hold:
1) Expand the Conference Call panel.
2) Move the mouse over the target call and click Hold.

5.10.6 Take Participant Off Hold

To resume a participant’s held call:
1) Expand the Conference Call panel.
2) Move the mouse over the target call and click Answer.

5.10.7 Leave Conference

To leave the conference:

In the Conference Call panel, click Leave Conference. The other parties continue their conversation.

NOTE: This function is only available for Three-Way Conferences.

5.10.8 End Participant

To end a selected call in a conference:
1) Expand the Conference Call panel.
2) Move the mouse over the call and click End.

5.10.9 End Conference

To end the conference:

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

Call Center collects call logs for your placed, received, and missed calls. You can call any number available in Call History. For information on making calls from Call History, see section 5 Manage Calls.

This section explains how to view and delete call logs.

6.1 View Call History

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

To view your call history:

1) In the Call Console, click Call History. The Call History dialog box appears displaying your past calls. The calls are grouped into placed, received, and missed calls. By default, missed calls are displayed.

2) To show calls in a specific group, select that group from the Show drop-down list.

6.2 Delete Call History

If your organization’s Call Center configuration allows, you can delete a selected call log or all call logs from Call History.

To delete calls from Call History:

1) In the Call Console, click Call History. The Call History dialog box appears.

2) To delete all call logs, click Delete All.

3) To delete a selected log, move the mouse over the log and click Delete.
7 E-mail Contacts

Call Center allows you to send an e-mail message to a contact that has e-mail configured on the system. You must also have messaging enabled within Call Center settings. For information, see section Settings – Messaging.

The EMAIL button appears when you select a contact who has an e-mail address configured.

7.1 Send E-mail Message to Contact

To send an e-mail message to a contact:

1) In the Group/Enterprise directory, move the mouse over a contact who has e-mail.

2) Click EMAIL. This brings up a new e-mail window for the configured Messaging service.

3) Write your message and click Send.
8 Manage Contacts

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

![Contacts Pane](image)

Call Center provides access to the contacts’ directories listed in the following table.

<table>
<thead>
<tr>
<th>Interface Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise/Group</td>
<td>The Enterprise/Group directory contains the contacts in your group or enterprise directory.</td>
</tr>
<tr>
<td>Common</td>
<td>The Common directory contains the contacts in the common phone list configured by your administrator on the Hosted VoIP Phone System Admin web portal.</td>
</tr>
<tr>
<td>Personal</td>
<td>The Personal directory contains all contacts in your Personal Phone List on the Hosted VoIP Phone System User web portal.</td>
</tr>
<tr>
<td>Supervisors</td>
<td>The Supervisors directory contains the list of your supervisors and allows you to view their phone state.</td>
</tr>
<tr>
<td>Speed Dial</td>
<td>The Speed Dial directory contains the numbers configured for you or by you for your Speed Dial services (Speed Dial 8 and/or Speed Dial 100).</td>
</tr>
</tbody>
</table>
### Interface Element | Description
--- | ---
Queues | The Queues directory lists the call centers and associated DNIS numbers for the call centers you are either supervising or staffing. It allows you to transfer calls to queues quickly.
Custom | A Custom directory contains selected contacts from your group or enterprise directory. You can have access to zero, one, or several custom directories. Custom directories are configured by your administrator.
Outlook | The Outlook directory contains your Outlook contacts.

Access to certain directories depends on your permissions and the system setup. For information, contact your administrator.

The Contacts pane also contains the Directories panel, which consolidates the contacts from the following directories: Enterprise/Group, Custom, Personal, Outlook, and Speed Dial. The Contacts pane is always visible. You can choose which directories to display in the Directories panel and you can collapse the panel, but you cannot close it.

For information about the operations you perform to manage your contact directories, see the following sections:
- View Contacts
- Organize Contacts
- Search for Contacts
- Manage Personal Contacts
- Manage Speed Dial Numbers

#### 8.1 View Contacts

Call Center allows you to select directories to display in the Contacts pane and below the Call Console, show or hide directory contents, and select the order of appearance for information in certain directories.

#### 8.1.1 Show or Hide Directories

You can decide which of the directories that you are allowed to access appear in the Contacts pane.

All directories can be displayed individually in the Contacts pane.

In addition, you can decide which directories to display in the Directories panel (on their own or with other directories), and below the Call Console.

**To show or hide a directory in the Contacts pane:**

1) In the Contacts pane, click **Options**.
2) Select **View, Directories**, and then select or unselect the directory to display/hide. To display all directories, select **All**.

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

**NOTE:** You cannot close the Directories panel.
To show a directory in the Directories panel:

In the Directories panel, select the directory to display from the drop-down list. To display all directories, select *Show all.*
8.1.2 Display Directory Below Call Console

To display a directory below the Call Console:

1) In the Directories panel, select Show all.

![Directories Panel – Selecting Directory](image)

Figure 57  Directories Panel – Selecting Directory

2) Click the Pullout Directory button for the directory to display.

The directory appears below the Call Console.

![Custom Directory Displayed Below Call Console](image)

Figure 58  Custom Directory Displayed Below Call Console

To close the directory, click the Close button.
8.1.3 Show or Hide Directory Content

By default, your directories are collapsed, with only the title bar visible. You can selectively expand the directories that you want to consult or use.

**To show or hide contacts in a directory:**

In the Contacts pane, click the Expand/Collapse button for that directory.

![Group Panel Expanded](image)

8.1.4 Show Contact Details

You can view the details of a contact in any directory.

**To view contact details:**

1) Expand the target directory.

2) Click the contact. The entry expands, displaying the contact’s details. The information depends on the target directory and includes the contact’s phone numbers or IDs and action buttons.

Only one contact per directory can be expanded at a time. When you click a contact, the system automatically hides the details of the previously expanded contact.

![Group Panel – Contact Details](image)
8.1.5 Select Display Order

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

To specify the contacts’ display order:

1) In the Contacts pane, click the Options button.
2) Select View, then Display Name, and then the order in which you want to display the contacts: Last Name, First Name -or- First Name, Last Name.

Figure 61 Contacts Pane – Displaying Contacts by First Name, Last Name

Figure 62 shows supervisors displayed by their last name followed by their first name.

Figure 62 Supervisors Panel – Supervisors Listed by First Name, Last Name

8.2 Organize Contacts

8.2.1 Sort Contacts

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

To order contacts in a directory:

1) In the Contacts pane, click Options.
2) Select Sort, followed by the name of the directory in which you want to sort contacts, and then the sorting option.

Figure 63 Contacts Pane – Sorting Contacts
Figure 64 shows a Group directory sorted by the contact’s first name.

![Figure 64 Group Panel – Contacts Sorted by First Name](image)

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

8.3 Search for Contacts

Call Center provides you with a search function that allows you to search for specific contacts in your directories.

You use the Search panel in the Contacts pane to look for contacts.

![Figure 65 Contacts Pane – Search Panel](image)

8.3.1 Perform Contact Search

**To search for contacts:**

1) In the Search text box, enter the text you want to search for and press ENTER. You can enter partial information, such as part of a name or phone number.

   For example, if you do not remember whether Mary’s last name is spelled “Shelley” or “Shelly”, you can enter “Shell”, and either name is returned.

2) To restrict the search to contacts that start with the entered text, check the Begins with box.

3) From the drop-down list, select the directories to search.

4) Press ENTER.

   The text you enter is matched against all attributes of every entry in the selected directories.
NOTE: The search is not case-sensitive; the search for “Ann” and “ann” returns the same results.

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

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

Duplicate search results in other directories are displayed.

NOTE: Contact entries displayed in search results follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

8.4 Manage Personal Contacts

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

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

- Add Personal Contact
- Delete Personal Contact

You cannot modify a personal contact entry in Call Center. To modify information for a personal contact, delete the entry and add it again.
8.4.1 Add Personal Contact

To add a personal contact:

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

2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

![Edit Personal Contact Dialog Box – Adding Entry](image)

3) In the *Name* text box, enter the contact's name or description, as you want it to appear on the contact's list.

4) In the *Number* text box, enter the phone number of the contact.

5) To save the entry, click anywhere in the dialog box outside the entry.
8.4.2 Delete Personal Contact

To delete a speed dial entry:

1) In the Personal panel, click Edit. The Edit Personal Contact dialog box appears.
2) Select the entry to delete and click Delete.

![Edit Personal Contact Window – Deleting Entry](image)

8.5 Manage Speed Dial Numbers

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

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

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

8.5.1 Add Speed Dial Entry

To add a speed dial entry:

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

8.5.2 Modify Speed Dial Entry

To modify a speed dial entry:

1) In the Speed Dial panel, click Edit. The Edit Speed Dials dialog box appears.
2) Double-click the entry to modify. The entry becomes modifiable.

3) Modify information as required.
4) To save the changes, click anywhere in the dialog box outside the entry.
8.5.3 Delete Speed Dial Entry

To delete a speed dial entry:

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

Figure 71 Edit Speed Dials Dialog Box – Deleting Entry
9 Monitor Supervisors

Call Center allows you to monitor the phone state of selected supervisors (up to 50). This is useful when you are escalating a call and want to find a supervisor who is available to take a call quickly.

You use the Supervisors panel to view the phone state of selected supervisors and to select supervisors to monitor. Supervisors who are not monitored have their state set to "Unknown".

![Supervisors Panel](image)

Figure 72 Supervisors Panel

9.1 Select Supervisors to Monitor

The list of selected supervisors is saved when signing out as part of your workspace and is restored on subsequent logins.

To select the supervisors to monitor:

1) In the Supervisors panel, click **Edit**. The Supervisor Favorites dialog box appears.

![Supervisor Favorites Dialog Box](image)

Figure 73 Supervisor Favorites Dialog Box

2) Check the box next to each supervisor to monitor and click **Save**.

9.2 Supervisor Phone States

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

<table>
<thead>
<tr>
<th>Phone State</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Idle</strong></td>
<td><img src="image" alt="GreenIcon" /></td>
<td>Supervisor’s phone is on-hook, which means the supervisor is not on a call.</td>
</tr>
<tr>
<td><strong>Busy</strong></td>
<td><img src="image" alt="RedIcon" /></td>
<td>Supervisor’s phone is off-hook, which means that the supervisor is on a call.</td>
</tr>
<tr>
<td>Phone State</td>
<td>Icon</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>------</td>
<td>---------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Ringing</td>
<td><img src="bell_icon.png" alt="Bell icon" /></td>
<td>Supervisor’s phone is in alerting state; a call is currently being delivered to the supervisor.</td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td><img src="dnd_icon.png" alt="Do Not Disturb icon" /></td>
<td>Supervisor has enabled the Do Not Disturb service.</td>
</tr>
<tr>
<td>Private</td>
<td><img src="lock_icon.png" alt="Lock icon" /></td>
<td>Supervisor has enabled phone state privacy.</td>
</tr>
<tr>
<td>Call Forwarding Always</td>
<td><img src="cfa_icon.png" alt="Call Forwarding icon" /></td>
<td>Supervisor has enabled the Call Forwarding Always service.</td>
</tr>
<tr>
<td>Unknown</td>
<td><img src="unknown_icon.png" alt="Unknown icon" /></td>
<td>Supervisor is currently not monitored.</td>
</tr>
</tbody>
</table>
# Monitor Call Centers

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

## Dashboard Pane

The *Dashboard* pane lists the monitored call centers and provides key indicators for each. For information about selecting call centers to monitor, see section 10.2 Select Call Centers to Monitor.

Some fields are color-coded to provide visual indicators of threshold severity. Threshold values are configured by your administrator. The visual Indicators of threshold severity are as follows:

<table>
<thead>
<tr>
<th>Severity</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 (no threshold crossed)</td>
<td>No color</td>
</tr>
<tr>
<td>1 (yellow threshold crossed)</td>
<td>Yellow</td>
</tr>
<tr>
<td>2 (red threshold crossed)</td>
<td>Red</td>
</tr>
</tbody>
</table>

![Figure 74 Dashboard Pane (Agents)](image)

The following information is provided for each monitored call center:

- **Call center name** – The name of the call center.
- **Service Mode** (Premium call centers) – The mode in which the call center currently operates. This field can have one of the following values:
  - **Night Service** – The call center is processing calls according to the Night Service schedule and policy.
  - **Night Service Override** – The call center has been manually forced to follow the Night Service policy.
NOTE: The Night Service or Night Service Override status appears only if the Night Service policy is triggered, either by the Night Service schedule or by a manual override, and if the action to apply to incoming calls is set either to “Perform busy treatment” or “Transfer to phone number/SIP-URI”. Setting the action to “None” acts as if the Night Service policy was not triggered and the Night Service/Night Service Override status is not displayed in Call Center.

- **Holiday Service** – The call center is processing calls according to the Holiday Service schedule and policy.

NOTE: The Holiday Service status appears only if the Holiday Service policy is triggered and if the action to apply to incoming calls is set by a Hosted VoIP Phone System administrator to either “Perform busy treatment” or “Transfer to phone number/SIP-URI”. Setting the action to “None” acts as if the Holiday Service policy was not triggered and the Holiday Service status is not displayed in Call Center.

- **Forced Forwarding** – All calls to this call center are forwarded to a specified destination.
- **None** – Call center is in normal mode of operation; none of the above modes are enabled.

NOTE: When the call center is in Normal service mode, the Service Mode field displays “None”.

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

The fields that provide visual indicators are Current Calls in Queue, Longest Waiting Call, EWT, AHT, and ASA.
10.2 Select Call Centers to Monitor

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

To select call centers to monitor:

1) In the Dashboard pane, click Options and select the Select Queues option. The Select Queues dialog box appears.

   ![Select Queues Dialog Box](image)

   Figure 75 Select Queues Dialog Box

2) Check the call centers you want to monitor and click Save.
10.3 Select Information to Display

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

**To select information to display:**

1) In the Dashboard pane, click *Options* and select the *Select Visible Fields* option. The *Select Fields* dialog box appears.

![Select Fields Dialog Box](image)

**Figure 76 Select Fields Dialog Box**

2) To display all performance indicators, check *Select All*. Or to show or hide some fields, check to uncheck the corresponding check boxes.

3) Click *Save*.

10.4 Order Call Centers

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

**To change the order of call centers:**

1) In the Dashboard pane, click *Options*.

2) Select *Sort By* and then select the ordering options you want.

![Dashboard – Options – Sort By](image)

**Figure 77 Dashboard – Options – Sort By**
11 Generate Reports

Call Center provides reporting functions to agents and supervisors. Agents can only generate reports about their own activity whereas supervisors have access to reports on activity and performance of agents and call centers under their supervision.

The Reporting feature allows you to run reports and schedule reports to run in the future using predefined templates. Reports can be of type Agent or Call Center.

The report templates available to you depend on how your administrator has configured your system.

You use the Reporting link at the top of the main interface to access pages used to generate and schedule reports.

Figure 78 Main Interface (Top of Window)

This section provides an example of a report.
11.1 Run Report

To run a report:

1) Click the Reporting link at the top right-hand side of the main window. A Report window appears.

Figure 79 Report Window
2) Select a report template from the drop-down list. The page displays the input parameters for the report.

![Report Input](image)

Figure 80 Abandoned Call Report – Running Report

3) Fill in the required information. The input that you need to provide depends on the template you select and the report type. The following table explains the input parameters for all reports.

<table>
<thead>
<tr>
<th>Input Field</th>
<th>Description</th>
<th>Allowed Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scope</strong></td>
<td>This parameter is disabled when an agent runs the report, since agents can only run reports about themselves.</td>
<td>Default value to reporting agent</td>
</tr>
<tr>
<td><strong>Call Completion</strong></td>
<td>This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to “1” through “7200” seconds.</td>
<td>1 through 72000</td>
</tr>
<tr>
<td><strong>Short Duration</strong></td>
<td>This setting is used to count the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to “1” through “7200” seconds.</td>
<td>1 through 7200</td>
</tr>
<tr>
<td><strong>Service Level</strong></td>
<td>This setting allows you to provide up to five service levels, used to perform service-level calculations for each call center or DNIS. Each service level can be set to “1” through “7200” seconds.</td>
<td>1 through 7200</td>
</tr>
<tr>
<td>Input Field</td>
<td>Description</td>
<td>Allowed Value</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Service Level Options**   | These settings are used to determine whether certain types of calls should be included in the service-level calculations:  
  - Check Include overflow time transfers in service level to include calls transferred due to time overflow.  
  - Check Include other transfers in service level to include calls transferred for other reasons.  
  - Select one of the following options for abandoned calls:  
    - Exclude Abandoned Calls to exclude all abandoned calls  
    - Include All Abandoned Calls to include all abandoned calls  
    - Include All Abandoned Calls Except Before Entrance Completes to include calls abandoned after the entrance message has finished playing  
    - Include Abandoned Calls Except in Defined Interval to include calls abandoned after the time specified by the abandoned call interval parameter. | These options can be checked or unchecked.        |
| **Abandoned Call Interval** | If you selected the Include Abandoned Calls Except in Defined Interval option, enter the desired interval in this text box in seconds.                                                                         | 1 through 7200                                    |
| **Service Level Percentage**| This setting allows you to specify the service-level objective (expressed as a percentage of calls).                                                                                                         |                                                   |
| **Type**                    | This can be checked as Historical or Real time.  
  - Historical reports show data from the assigned start date to the assigned end date.  
  - Real-time reports show data from the assigned start date to the present, with the current interval refreshed with real-time data.  
  Real-time reports for individual agents contain data for each time interval, with the last interval reflecting real-time data, if requested (subject to the refresh rate). When the interval switches over, the final data for the last time period is captured and shown as historical data and real-time data is reflected in the new time interval. | Historical or Real time                           |
| **Start Date**              | This is the date when you want the report to start. It can be set by typing in the text box or clicking the Calendar icon. This is compulsory. The oldest historical date depends on the interval selected:  
  - 180 days of half-hour interval statistics  
  - 365 days of hourly interval statistics  
  - 730 days of daily interval statistics | MMM DD, YYYY                                      |
| **Start Time**              | This is the time when you want the report to start. You can select the hour format (A.M., P.M., or Military time) from the Hour Selection Type. Time is applicable for hourly and minute intervals only. | 1:00am through 12:59am, 1:00pm through 12:59pm, or 0:00 through 23:59 |
| **End Date**                | This is the date when you want the report to end. It can be set by typing in the text box or clicking the Calendar icon. This is required when a Historical report is selected. | MMM DD, YYYY                                      |
| **End Time**                | This is the time when you want the report to end. You can select the hour format (A.M., P.M., or Military time) from the Hour Selection Type. Time is applicable for hourly and minute intervals only. This is required when a Historical report is selected. | 1:00am through 12:59am, 1:00pm through 12:59pm, or 0:00 through 23:59 |
## Input Field Description

<table>
<thead>
<tr>
<th>Input Field</th>
<th>Description</th>
<th>Allowed Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sampling</td>
<td>This sampling period is only applicable to interval-based report templates and determines how the report information is presented. For example, an hourly report displays information for each hour of the report time frame.</td>
<td>15 minutes, 30 minutes, Hourly, Daily, Weekly, Monthly</td>
</tr>
<tr>
<td>Output Format</td>
<td>This allows you to specify in what format you would like the report output to be generated. If you select Hypertext Markup Language (HTML) or PDF, the report is displayed in the Report window. If you select Excel File Format (XLS), a file is created that you can save on your computer.</td>
<td>PDF, XLS, HTML</td>
</tr>
</tbody>
</table>

4) Click **Run Report**.

The results of the report are displayed in the **Report Output** area of the window. See the following section for an example of a report.

**NOTE:** Adobe Reader 10.01 has a setting **Enable Protected Mode at startup**, which is enabled by default. If you select the PDF report format and are using Adobe Reader 10.01 (or later, which has this setting), you need to disable the setting; otherwise, report results are not displayed.

To disable the protected mode in Adobe Reader, perform the following steps.

1) Close all opened Internet Explorer and Adobe Reader instances.
2) Open Adobe Reader.
3) From the menu bar, select **Edit** and then **Preferences**. The **Preferences** dialog box appears.
4) From the Categories menu on the left, select General.

![Preferences - General](image)

5) Uncheck *Enable Protected Mode at startup*.

6) Click **OK**.

7) Close Adobe Reader.
11.1.1 Report Results (Example)

Depending on the report type, the report results can contain the following elements: A pie chart, a bar chart, a table, a high-water marks table, and a line chart.

If you select HTML or PDF report format when requesting a report, the report is displayed in the Report window. If you select XLS, a file is created that you can save on your computer.

This section provides an example of a report: Abandoned Calls Report.

The results of the Abandoned Calls Report are presented in a bar chart and table.

![Abandoned Calls Report](image1)

Figure 82 Abandoned Calls Report – Bar Chart

![Abandoned Calls Report Table](image2)

Figure 83 Abandoned Calls Report – Table (Fragment)
11.2 Schedule Report

To schedule reports, your company (group or enterprise) must have Enhanced Reporting enabled. For more information, see your administrator.

To schedule a report:
1) Click the **Reporting** link at the top right-hand side of the main window. A Report window appears.

![Figure 84 Report Window – Report List](image-url)
2) Select a report template from the drop-down list. The page displays the input parameters for the report.

![Scheduled Reporting](image)

Figure 85 Scheduling Report (Abandoned Call Report)

3) For Type, select **Scheduled**.

4) Provide the name and the description of the report.
5) Specify the recurrence pattern of the report. From the Recurs drop-down list, select one of the following options: Never, Daily, Weekly, Monthly, or Yearly. Never signifies that this is a one-time report.

- If you selected Daily, enter the frequency of recurrence in days.

![Recurrence Pattern: Daily](image)

Figure 86 Scheduled Report – Daily Recurrence Pattern

- If you selected Weekly, enter the frequency of occurrence in weeks and select the day of the week when you want the report to be generated.

![Recurrence Pattern: Weekly](image)

Figure 87 Scheduled Report – Weekly Recurrence Pattern

- If you selected Monthly, enter the frequency of occurrence in months and specify the day when you want the report to be generated. Select one of the following options:
  - To schedule the report on a specific day of the month, for example, the twenty-seventh, check Day <X> of the month and enter the day.
  - To schedule the report on a specific day of the week within the month, for example the second Monday of the month, check The <X> <Day of week> of the month and select X and Day of week from the drop-down lists.

![Recurrence Pattern: Monthly](image)

Figure 88 Scheduled Report – Monthly Recurrence Pattern

- If you selected Yearly, specify the frequency of occurrence in years, for example every two years, and specify the day for the recurrence of the report. Select one of the following options:
  - To schedule the report on a specific day of the year, check Day <X> of <Month> and select the day and the month.
  - To schedule the report on a specific day of the week and month, for example, the first Sunday of January, check The <X> <Day of week> of <Month> and select X, Day of week, and Month from the drop-down lists.
6) Specify when the report should run.
   - For a non-recurrent report, specify the actual date and time to generate the report.

   ![Figure 90 Report Time for a Non-recurrent Report](image)

   - For a recurrent report, specify when the report should be generated for the first time.

   ![Figure 91 Report Time for a Recurrent Report](image)

   **NOTE:** The start date and run time (and for weekly reports the day of the week) determine when the report is generated for the first time. The subsequent times are determined by the recurrence pattern and range.

7) For a recurrent report, specify when the reporting should end. For Recurrence Range, select from the following options:
   - *Never*
   - *After* \(<X>\) *occurrences*, and enter the number of occurrences
   - *Date*, and select a date from the calendar

   ![Figure 92 Scheduled Report – Recurrence Range](image)

8) Specify the report time frame, that is, the period for which you are requesting the report.
   - For a non-recurrent report, enter the actual dates and times.
Figure 93 Report Timeframe for a Non-recurrent report

- For a recurrent report, select the time frame relative to the report generation time, for example, the previous month, previous five days, and so on.

NOTE: A report time frame always has a beginning date and time and an end date and time. For a recurring report the relative time frame is converted to the actual dates and times at the moment when the report is run.

The actual time frame always starts at the top of the hour, day, week, month, or year and is based on the selected time zone and day of the week. For example, if a report is scheduled to run every day at 5:45 P.M. for the previous two hours, then the actual time frame of the report is from 3:00 P.M. to 5:00 P.M. of the day when the report is run.

9) Specify the sampling frequency. From the Sampling drop-down list, select a frequency.
10) Specify the output format of the report. From the Output Format drop-down list, select a format, for example, PDF.

Figure 95 Report Sampling and Output Format

11) Enter the e-mail addresses of the recipients of the report.
12) Enter the remaining parameters, as required. For the description of the remaining parameters, see section 11.1 Run Report.
13) Click Schedule Report.

The report is scheduled. It is run at the specified times and sent to the recipients configured in the report schedule.

11.3 Manage Scheduled Reports

You can list, modify, and delete scheduled reports.
To manage scheduled reports:

1) Click the **Reporting** link at the top right-hand side of the main window. A **Report** window appears.

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 the **Load** button in the row for the report, and modify the report as required.

4) To delete a report, click the **Delete** button in the row for the report.
12 Configure Call Center

You use the Settings page, accessed via the Settings link at the top right-hand side of the main page to configure various aspects of the Call Center application.

To return to the main interface, click the Back To Application link.

NOTE: Do not use the internet browser’s Back button to return to the main interface.

This section provides information about the options that you can use to configure Call Center.

- Settings – General
- Settings – Application
- Settings – Services
- Settings – Plug-ins
- Settings – Messaging
- Settings – Report
- Settings – About

NOTE: Depending on your system configuration, some settings may not be available.
12.1 Settings – General

You use the General tab to configure miscellaneous settings that improve the usability of Call Center.

![General Settings Table]

Figure 97 Setting – General

The following subsections describe the settings that can be configured on this page.

12.1.1 Account

You use this area to change your Hosted VoIP Phone System password.

Call Center shares logon credentials with the Hosted VoIP Phone System. So when you change your password in Call Center, remember to use this new password when accessing your web portal.

**NOTE:** The password you enter must meet the password requirements set on the Hosted VoIP Phone System web portal.
To change your password:

1) Click the **Change Password** link. The section expands, allowing you to change your password.

   ![Change Password](image)

   **Figure 98** Account – Change Password

2) Enter your current and new password and click **Change Password**.

   Note that the **Reset** button does not reset your password. It only clears the input boxes.

12.1.2 Hotel Guest

This setting allows you to configure the Hoteling Host, which is required when you use Call Center from a Hoteling desk/device. This way you do not need to enter this information every time you sign in to Call Center if you use the same Hoteling device.

In the text box, enter the user name of the Hoteling Host who corresponds to the desk/device you are using, for example, “station_224@acme.com”.

12.1.3 Language

The language settings allow you select the language of the Call Center user interface.

- The drop-down list lists the languages available in your edition of Call Center. To change the language, select a new language from the list.
- **Synchronize language to my profile** – This box, when checked, synchronizes the Call Center language with your Hosted VoIP Phone System User profile and ignores the language selection on this page.

12.1.4 Screen Pop

You use the screen pop settings to configure the URL that may be launched on incoming calls.

- **Enter URL** – This text box allows you to enter the URL address of the web page that Call Center opens using the default browser when you click the **Web Pop URL** button in the **Call Notification** pop-up window.

- **Auto pop for incoming calls** – When this option is checked, Call Center launches the Web Pop URL without your having to click the Web Pop URL button in the **Call Notification** pop-up window for each incoming call.

The URL can point to any URL address, but typically points to a web application that parses optional call parameters and passes them to a Customer Relationship Management (CRM) application or other database. For example:

```
http://www.mysite.com/webapp.php?remoteNumber=__REMOTE_PHONE__&sp=__SERVICE_PROVIDER__
```

This URL passes the incoming calling number and the service provider ID to the web application at [www.mysite.com](http://www.mysite.com). The web application formats the data for the applicable database and launches the web page on your PC.
There are a number of optional parameters that the client can pass to the browser. The following list summarizes these parameters:

- **USER**: The user’s Hosted VoIP Phone System ID (Note that in this case the “user” is the Hosted VoIP Phone System subscriber.)
- **FIRST**: The first name of the user
- **LAST**: The last name of the user
- **EMAIL**: The e-mail address of the user
- **GROUP**: The name of the Hosted VoIP Phone System group to which the user belongs
- **SERVICE_PROVIDER**: The name of the Hosted VoIP Phone System service provider to which the user belongs
- **PHONE**: The phone number of the user
- **REMOTE_PHONE**: The phone number of the remote party
- **REMOTE_NAME**: The name of the remote party (when available)
- **CALL_TYPE**: “Incoming”, “Outgoing”, or “Alerting”
- **DNIS_NAME**: The name of the DNIS on which the call was received
- **DNIS_PHONE**: The phone number of the DNIS on which the call was received

### 12.1.5 Date Format

This setting allows you to select the format for displaying dates in reports. The format is used for all dates that are included in generated reports. The possible options are:

- MM/DD/YYYY
- DD/MM/YYYY

### 12.1.6 Time Format

This setting allows you to select the format for displaying time in reports. It is used for all times that are included in generated reports. The possible options are:

- AM/PM
- 24 hours

Note that this setting does not impact the format in which event duration is reported in generated reports, which is always **DD:HH:MM:SS**.

### 12.1.7 Workspace

Call Center allows you to customize elements of your workspace, such as the size and placement of windows on the desktop. The system remembers the setup between sessions.

The following elements can be customized:

- The size and position of the web browser window in which the main interface is displayed
- The size of the panes (Call Console, Contacts, and Queued Calls)
- The size and position of the Dashboard window
- The size and position of any Report window
NOTE 1: This functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.

NOTE 2: When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

- **Save Workspace** – This button, when clicked, saves the current workspace.
- **Load Workspace** – This button, when clicked, arranges your workspace according to the last saved configuration.
- **Restore To Default** – This button, when clicked, restores the workspace to the system default configuration.
- **Always save workspace on signout** – When you sign out from the client, Call Center asks you whether you want to save your current workspace. To save your workspace automatically when signing out, without being asked, check the **Always save workspace on signout** box.

**To customize your workspace:**
1) Arrange the windows the way you like.
2) Click the **Save Workspace** button to save the current configuration. To restore the system default, click **Restore To Default**.
3) At any time to return to the last saved configuration, click the **Load Workspace** button.
12.2 Settings – Application

You use the Application tab to configure your application settings. The settings are different for agents and supervisors. They are described in the following subsections.

![Image of Application settings]

**Figure 99 Settings – Application (Agent)**

### 12.2.1 Queue Memberships

These settings allow you to select the call center queues you wish to join. The table also displays your skill level in each queue (for more information, see section 13.2 Agent Skill Levels (Premium Call Center).

1) To join a call center queue, select the check box on the line for the call center.
2) To join all queues, select the check box in the header.

**NOTE:** If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue, if you are not allowed to do it yourself, contact your administrator.

### 12.2.2 Agent Policies

You use agent policies settings to specify your post sign-in ACD state, post call ACD state, wrap-up timer, and outbound CLID:

- **Post Sign-In ACD State** – To configure your post sign-in ACD state, select a state from the Sign-In State drop-down list. Your ACD state is automatically set to the selected state when you sign in to Call Center.

If you selected *Unavailable* and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.
Post Call ACD State – To configure your post call ACD state, that is your ACD state upon completion of a call, select a state from the Post Call State list.

If you selected Unavailable and unavailable codes are enabled for your organization, select an unavailable code from the drop-down menu.

In most cases, when you select Wrap-Up, you must also configure your wrap-up timer.

Set Wrap-Up Timer to – To set your post call wrap-up timer, check the Set Wrap-Up Timer to <mm:ss> for queues without a policy box and enter the time in minutes and seconds. Your ACD state automatically changes from Wrap-Up to Available after the specified period of time.

**NOTE:** Your post call wrap-up timer setting may be overridden if your administrator sets the timer to a smaller value on the Hosted VoIP Phone System Admin web portal.

Outgoing calls as call center – Check this box to display a call center CLID instead of your phone number when you make a call.

Outbound Caller ID – If you checked Make outgoing calls as call center, select the number to use from the drop-down menu.

12.3 Settings – Services

You use the Services tab to configure various services assigned to you by your administrator on the Hosted VoIP Phone System Admin portal, which are integrated with Call Center. These settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

![Services tab in the call center interface](image)

The services that you can configure (if you have been assigned the services) are:

- **Do Not Disturb** – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.

- **Call Forwarding Always** – When you activate this service, you must provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.
To activate a service:
1) Select the service and check the Is Active box. The service is moved from the Inactive to Active category.
2) If you enabled the Call Forwarding Always service, in the Forward To box that appears, enter the number to forward your calls to.
3) To generate a ring splash for incoming calls, check the RingSplash option.
4) To save your changes, click Save.

12.4 Settings – Plug-ins

You use the Plugins tab to configure the plug-in software used by Call Center to provide functionality such as call notification, program shortcuts, and call log.

![Figure 101 Settings – Plugins](image)

12.4.1 Notification

These options control when and how call notifications are displayed. The options you can set are as follows:

- **Focus window for incoming calls** – When this option is checked and the browser window that is running Call Center is minimized, Call Center automatically restores the window on incoming calls.
This does not work in Firefox. In Internet Explorer, you must have only one tab open in the web browser running Call Center.

- Show notification for calls – When this option is checked, Call Center displays the Call Notification pop-up window on top of other applications' windows when you receive a call. When you check this box, you need to select an option from the drop-down list to specify the condition under which notifications are displayed.

This does not work if other tabs are open in the same web browser window as Call Center. In addition, if calls come within eight seconds of each other, the Call Notification pop-up window appears only for the first call of that series.

12.4.2 Microsoft Outlook

The Microsoft Outlook options control Outlook integration with Call Center. They are only visible if Outlook integration is enabled in Call Center.

The options you can set are as follows:

- Enable/Disable Outlook Integration – This determines whether Call Center integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from the Hosted VoIP Phone System.

- Retrieve contacts from – This option allows you to specify where to look for your Outlook contacts.

- Use Outlook contacts as preferred CLID lookup – When this option is checked, Call Center uses Outlook to try to identify a caller when the caller ID is unknown.

**NOTE:** The Outlook Integration feature provides the following functionality: CLID lookup, saving vCards, and accessing and searching Outlook contacts. When using Microsoft Outlook 2010 (32- or 64-bit edition), Outlook must be running before Call Center is launched for these functions to work.

If Outlook contacts are not loading, log out of Call Center and clear your browser's cache. Then log back into Call Center and then refresh the page.

12.4.3 LDAP v3

LDAP settings allow you integrate an LDAP directory with Call Center. These options are only visible if LDAP integration is enabled in Call Center and the local network has been configured appropriately. If you do not know the appropriate settings, contact your system administrator.

Make sure you have correctly imported a valid certificate in the Java Keystore (JKS) with the keytool.

**To import a certificate:**
1) Click Start and then select Run…
2) Type “cmd” and click OK.
3) Type “<Java Runtime Path>\bin\keytool -import -alias <aliasname> -file <path><certificate file name> -keystore %JAVA_HOME%\jre\lib\security\cacerts”.

**To verify the certificate:**
1) Click Start and select Run…
2) Type “cmd” and click OK.
3) Type “<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>“.
The LDAP directory options are as follows:

- **Enable/Disable LDAP Integration** – This determines whether Call Center provides LDAP directory lookup services. Clicking the **Enable LDAP Integration** button enables the controls for LDAP settings.

- **LDAP Hostname** – This is the network address of the LDAP server.

- **LDAP Port** – This is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.

- **Search Base**:
  - The text box determines the location in the LDAP server tree that Call Center looks in when executing a search.
  - The check box, when checked, searches all sub-trees within the search base until the specifications are found.

- **Encrypt Connection** – This option determines whether Call Center uses encryption when connecting to the LDAP server. Note that if encryption is enabled, you may have to use of a different port.

- **("cn=__SEARCH__Text")** – This option specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn="__SEARCH_TEXT__"). Alternatively, in another example, (telephoneNumber=*) restricts search results to users who have a telephone number assigned.

- **Attribute Mapping** – This table controls the way that Call Center maps attributes returned from the directory server to columns displayed on the list of search results. In each row of the table, enter an LDAP attribute in the **Remote Attribute** column. In the **Local Attribute** column, enter a corresponding local attribute. Typical Remote Attribute values are "cn", "sn", "telephoneNumber", "mobile", "homePhone", and "mail".

- **Authentication Required** – When this box is checked, Call Center must provide a user name and password to the directory server to conduct searches.

- **DN** – This is the user name Call Center uses when connecting to the LDAP server when **Authentication Required** is checked.

- **Password** – This is the password that corresponds to the authentication **DN**.

### 12.4.4 Program Shortcuts

You use the program shortcuts settings to create call center shortcuts on your desktop for convenient access to Call Center.

The program shortcuts plug-in allows for the creation of desktop shortcuts on a Windows platform, which when clicked, launches the applications in your default web browser.

- **Add Shortcut** – This button, when clicked, creates a call center shortcut on your desktop.

- **Remove Shortcut** – This button, when clicked, removes the previously created Call Center shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.

### 12.4.5 Call Event Log

This plug-in software provides the ability to store call event statistics content locally on your computer.

- **Enable/Disable Call Event Log Integration** – This double-action button allows you to enable or disable call log archives on your computer.
- **Rotate Log** – This parameter allows you to specify the frequency with which the call log is rotated. You select the frequency from the drop-down list.
- **Open Log Location** – Click this link to go to the place on your computer where the log is stored.

### 12.5 Settings – Messaging

The Messaging tab allows you to configure various messaging options for Call Center. Currently, e-mail messaging is supported.

![Image of the Messaging tab](Image)

**Figure 102** Settings – Messaging

#### 12.5.1 E-mail Messaging

These options allow you to specify the mail client you use for sending e-mail messages.

From the drop-down list, select the mail client to use for e-mails.

If you selected the custom Simple Mail Transfer Protocol (SMTP) option, you also need to configure the following options:

- **Display Name** – This is the name that is displayed in the From field.
- **Reply-to Address** – This is the address where reply messages can be sent.
- **Default Subject** – This is the subject that appears when you generate an e-mail message in Call Center.
- **SMTP Host** – This is the IP address of the SMTP host.
- **SMTP Port** – This is the port of the SMTP host.
- **Outgoing SMTP Server requires Authentication** – When this option is set, authentication is required to send e-mails.
- **Username** – This is the name you must enter to authenticate yourself.
- **Password** – This is the password part of your authentication credentials.
- **Mail Type** – This is the type of mail to use.
- **Mail Template** – This is the mail template to use.

**NOTE:** Verify with your IT personnel that the firewall is configured to allow for this type of messaging.
12.6 Settings – Report

You use the Report tab to configure values to be used as default input parameters for generating reports. If you do not provide any values, system defaults are used. You can change these values as required when generating reports.

Define the thresholds that are used by default when you generate reports that require you to provide thresholds. This is useful, if you often use the same threshold values. You can always change a default value, when required.

- **Call Completion** – This setting is used to count the number of ACD calls an agent has completed within a service level during the specified interval. The Call Completion service level can be set to “1” through “7200” seconds.
- **Short Duration Call** – This setting is used to count the number of ACD short duration calls completed by an agent during an interval. You can set the maximum length of a short duration call to “1” through “7200” seconds.

### 12.6.1 Default Thresholds

#### Default Start Day of the Week

The following setting allows you to configure the day of the week to start reports.

- **Default Start Day of Week** – This setting applies to interval-based reports, when the selected sampling period is “Weekly”. It can be set to any day of the week.
12.6.3 Default Service-level Calculations

The following settings allow you to configure default settings used to make service-level calculations.

- **Include Overflow Time Transferred Calls** – Check this box to include calls transferred due to time overflow in service-level calculations.
- **Include All Other Transfers** – Check this box to include calls transferred for other reasons that overflow in service-level calculations.
- **Exclude Abandoned Calls** – Check this box to exclude all abandoned calls from service-level calculations.
- **Include all abandoned calls** – Check this box to include all abandoned calls in service-level calculations.
- **Include all abandoned calls except before entrance completes** – Check this box to include calls abandoned after the entrance message has finished playing in service-level calculations.
- **Include Abandoned Calls except in Defined Interval** – Check this box to include calls abandoned after the time specified by the interval for abandoned calls parameter in service-level calculations.
- **Defined Interval for Abandoned Calls** – If you checked Include Abandoned Calls except in Defined Interval, enter the desired interval in this text box in seconds. The Defined Interval for Abandoned Calls can be set to “1” through “7200” seconds.

12.7 Settings – About

You use the About tab to view the information about Call Center.

![Figure 104 Settings – About](image)

The following information is provided on this page:

- **Version** – This is the name and software version of the Call Center client.
- **Profile** – This is the Call Center client profile used.
- **Disclaimer** – This is the Call Center copyright information.
13Appendix A: Glossary and Definitions

13.1 ACD States

ACD states specify the agent’s availability to take calls. The possible call states are those listed in the following table.

An agent can be in one of the ACD states.

<table>
<thead>
<tr>
<th>ACD State</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
</table>
| Available | 🧑‍💻 | Agent is available to receive ACD calls. (Agent can also receive direct calls.)
This is the primary ACD state of an agent during the workday. It indicates that the agent is at their workstation and either ready to take a call or on an active call.
ACD calls may be delivered to an agent who is in an Available state.
The Hosted VoIP Phone System uses both the ACD state and the phone state of the agent to determine whether to route a call to the agent.
By default, agents receive calls when they are available and their phone is Idle. However, this behavior can be overridden if Call Waiting on agents is enabled for the call center, which allows for new calls when the agent is available and on an active call. |
| Unavailable | 🧑‍くん | Agent is unavailable to receive ACD calls. (Agent can still receive direct calls.)
The Unavailable state should be used when the agent is away from their workstation and not available to take calls.
ACD calls are not delivered to agents in an Unavailable state.
This state should be used when the agent is at lunch, on a break, in a meeting, or engaged in some other activity while they are at work, but unavailable to take calls. |
| Wrap-Up | 🧑‍くん | Agent is performing post call work.
This state is designed to allow the agent to complete paperwork or other post call procedures associated with the last call.
Calls may be delivered to agents in Wrap-Up state depending on the call center configuration.
By default, calls are not routed to agents in Wrap-Up state, except when the call center is configured to enable calls to agents in the Wrap-Up state. |
| Sign-In | 🧑‍くん | The Sign-In state is equivalent to a “clock in”, which means that the agent is at their work location but not yet ready to accept incoming calls. Calls are not delivered to the agent in this state.
Sign-In is a transitional state and agents do not remain in this state; rather they transition to their post sign-in state.
It is recommended that agents only be in this state between the time they arrive at work and the time they become available to accept calls. |
| Sign-Out | 🧑‍くん | The Sign-Out state is equivalent to a “clock out”, which means that the agent’s workday or shift is completed and they are leaving.
Calls are not delivered to the agent in this state.
It is recommended not to use this state when agents leave for lunch or breaks during the day. The Unavailable state should be used for that. |

In Call Center, an agent can only set their ACD state to “Available”, “Unavailable”, or “Wrap-Up”. A supervisor can set the ACD state of an agent to “Available”, Unavailable”, Wrap-Up”, or Sign-Out”. The Sign-In state can only be assigned to an agent through the web portal.
13.2 Agent Skill Levels (Premium Call Center)

Agent skill levels are used to rate the ability of an agent to handle calls in call centers with skill-based routing.

- An agent skill level is an integer between 1 through 20, where 1 indicates the highest skill level.
- A skill level is assigned to an agent for each call center with skill-based routing to which the agent is assigned.
- A skill level is shown as “N/A” for Standard call centers and for call centers with priority-based routing.

13.3 Phone States

Phone states show the state of the monitored agent’s telephone line or the supervisor’s telephone line.

For supervisors, the phone states are displayed as follows:

<table>
<thead>
<tr>
<th>Phone State</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idle</td>
<td>![Green Icon]</td>
<td>Supervisor’s phone is on-hook, which means the supervisor is not on a call.</td>
</tr>
<tr>
<td>Busy</td>
<td>![Red Icon]</td>
<td>Supervisor’s phone is off-hook, which means that the supervisor is on a call.</td>
</tr>
<tr>
<td>Ringing</td>
<td>![Yellow Icon]</td>
<td>Supervisor’s phone is in alerting state; a call is currently being delivered to the supervisor.</td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td>![Off Icon]</td>
<td>Supervisor has enabled the Do Not Disturb service.</td>
</tr>
<tr>
<td>Private</td>
<td>![Privacy Icon]</td>
<td>Supervisor has enabled phone status privacy.</td>
</tr>
<tr>
<td>Call Forwarding Always</td>
<td>![Call Forwarding Icon]</td>
<td>Supervisor has enabled the Call Forwarding Always service.</td>
</tr>
<tr>
<td>Unknown</td>
<td>![Unknown Icon]</td>
<td>Supervisor is currently not monitored.</td>
</tr>
</tbody>
</table>

For agents, the phone states are combined with their ACD states and are displayed as follows:

<table>
<thead>
<tr>
<th>Phone State</th>
<th>ACD State</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idle</td>
<td>Available</td>
<td>![Available Icon]</td>
<td>Agent’s phone is on-hook and the agent is available to take ACD calls.</td>
</tr>
<tr>
<td>Ringing</td>
<td>Available</td>
<td>![Available Icon]</td>
<td>Agent’s phone is ringing and the agent is available to take the call.</td>
</tr>
<tr>
<td>Any</td>
<td>Unavailable, Sign-In, Sign-Out</td>
<td>![Unavailable Icon]</td>
<td>Agent is not available to take ACD calls.</td>
</tr>
<tr>
<td>Idle, Ringing</td>
<td>Wrap-Up</td>
<td>![Wrap-Up Icon]</td>
<td>Agent is performing post call work. They may or may not be available to take calls.</td>
</tr>
<tr>
<td>Busy</td>
<td>Available, Wrap-Up</td>
<td>![Wrap-Up Icon]</td>
<td>Agent’s phone is off-hook, which means that the agent is on a call. Calls may be delivered to agents depending on their call waiting settings and the call center’s call waiting and wrap-up settings.</td>
</tr>
</tbody>
</table>
13.4 Call States

Call states are the states that your current calls can be in. They are as follows:

<table>
<thead>
<tr>
<th>Call State</th>
<th>Display Name</th>
<th>Display Icon</th>
<th>Call Personality</th>
<th>Call Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ringing In (Local)</td>
<td>Incoming Local</td>
<td>🔔</td>
<td>Click To Dial</td>
<td>Answer, End</td>
</tr>
<tr>
<td>Ringing In (Remote)</td>
<td>Incoming</td>
<td>🔔</td>
<td>Terminator</td>
<td>Answer, Conference, End</td>
</tr>
<tr>
<td>Ringing Out, Outgoing</td>
<td>Outgoing</td>
<td>🔔</td>
<td>Originator</td>
<td>Conference, End</td>
</tr>
<tr>
<td>Active</td>
<td>Active</td>
<td>🔔</td>
<td>Any</td>
<td>Transfer, Hold, End, Conference</td>
</tr>
<tr>
<td>On Hold</td>
<td>Held</td>
<td>🔴</td>
<td>Any</td>
<td>Transfer, Resume, End, Conference</td>
</tr>
<tr>
<td>On Hold (Remote)</td>
<td>Held</td>
<td>🔴</td>
<td>Any</td>
<td>Transfer, Hold, End, Conference</td>
</tr>
<tr>
<td>Active (In Conference)</td>
<td>Active</td>
<td>🗣</td>
<td>Conference</td>
<td>Transfer, Hold, End</td>
</tr>
<tr>
<td>On Hold (In Conference)</td>
<td>Held</td>
<td>🗣</td>
<td>Conference</td>
<td>Resume, Transfer, End</td>
</tr>
<tr>
<td>Ringing In (Recalled Call)</td>
<td>Call Recalled</td>
<td>🔔</td>
<td>Terminator</td>
<td>Answer, Conference, End</td>
</tr>
</tbody>
</table>

13.5 Call Types

This section defines different types of calls measured in call center statistics.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ACD Call</td>
<td>This is a call delivered to a call center pilot number that is directed to an agent via the ACD function.</td>
</tr>
</tbody>
</table>
| Inbound Call     | This is a direct call to an agent. Other calls treated as inbound calls include:  
|                  | • Calls that a supervisor retrieves from a queue  
|                  | • Calls that an agent receives due to a transfer from another agent  
|                  | (Note that they may have originated as ACD calls.)                                                                                                                                                    |
| Outbound Call    | This is an outbound call made by an agent.                                                                                                                                                                |
| Held Call        | This is an ACD call that was placed on hold by an agent. Each time an agent places a call on hold, it is counted as a held call.                                                                             |
| Transferred Call | This is an ACD call that was transferred to another number. Transfers can be the result of manual transfers by agents, transfers to voice mail because the calls were timed out, and transfers by supervisors to alternate queues.  
|                  | **NOTE:** A timed-out call is a call that is transferred due to exceeding the maximum wait time in a queue.                                                                                                  |
| Answered Call    | This is an ACD call that was answered by an agent.                                                                                                                                                         |
| Abandoned Call   | This is an ACD call that entered the queue, but the caller hung up before the call was answered or transferred.                                                                                              |
| Received Call    | This is an ACD call that was received and either answered or abandoned. Overflowed calls are not included.                                                                                                 |
| Overflowed Call  | This is an ACD call that was received, but immediately transferred to another destination due to the queue’s exceeding the configured maximum queue size or the configured maximum wait time.                         |
| Queued Call      | This is an ACD call that is not immediately diverted using the Night Service, Holiday Service, Forced Forwarding, or Overflow, and goes to a queue to be distributed to an agent or to wait for an available agent.          |
| Bounced Call     | This is a call that has been transferred back to queue because it was not answered by an agent in the specified time.                                                                                       |
| Stranded Call    | This is a call that is in a queue after all agents assigned to the queue have moved to the Sign-Out ACD state.                                                                                              |
## Appendix B: Keyboard Shortcuts

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

<table>
<thead>
<tr>
<th>Key</th>
<th>Equivalent Mouse Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ESC</td>
<td>Click the Close button in a dialog box.</td>
<td>This closes the open dialog box.</td>
</tr>
<tr>
<td>ESC</td>
<td>Cancel the changes.</td>
<td>This exits the currently selected editable item, such as a text box.</td>
</tr>
<tr>
<td>/</td>
<td>Click the Dialer text box.</td>
<td>This places the cursor in the Dialer text box; it retains the currently selected item (if applicable). <strong>NOTE:</strong> In Internet Explorer 8, the “/” shortcut key does not always work. Pressing the key clears the default Enter Number text, but does not place the cursor in the input box.</td>
</tr>
<tr>
<td>?</td>
<td>Click the Search text box.</td>
<td>This places the cursor in the Search text box; it retains the currently selected item (if applicable).</td>
</tr>
<tr>
<td>ARROW DOWN</td>
<td>Click the scroll bar or the next item on a list.</td>
<td>This selects the next item in the Call Console or the Queued Calls pane.</td>
</tr>
<tr>
<td>ARROW UP</td>
<td>Click the scroll bar or the previous item on a list.</td>
<td>This selects the previous item in the Call Console or the Queued Calls pane.</td>
</tr>
<tr>
<td>PAGE DOWN</td>
<td>Scroll down one page.</td>
<td>This goes to the next page in the Call Console or the Queued Calls pane.</td>
</tr>
<tr>
<td>PAGE UP</td>
<td>Scroll up one page.</td>
<td>This goes to the previous page in the Call Console or the Queued Calls pane.</td>
</tr>
<tr>
<td>1….9</td>
<td>Select a call in the Call Console.</td>
<td>Pressing 1 selects the first call, pressing 2 selects the second call, and so on.</td>
</tr>
<tr>
<td>SPACEBAR</td>
<td>Click Answer on the selected incoming call in the Call Console.</td>
<td>This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold.</td>
</tr>
<tr>
<td>&lt;PERIOD&gt;</td>
<td>Click End on the selected call in the Call Console.</td>
<td>This ends the selected call.</td>
</tr>
<tr>
<td>ENTER</td>
<td>Click Dial.</td>
<td>If the cursor is placed in the Enter Number text box in the Dialer, the entered digits are dialed.</td>
</tr>
<tr>
<td>ENTER</td>
<td>Click Search.</td>
<td>If the cursor is placed in the Search text box, a search is performed.</td>
</tr>
<tr>
<td>+</td>
<td>Click Transfer in the Dialer.</td>
<td>This transfers the selected call to the ad hoc number entered in the Dialer.</td>
</tr>
<tr>
<td>SHIFT+1..9</td>
<td>Select a ringing call and click Answer.</td>
<td>Pressing SHIFT+1 selects and answers the first ringing call, pressing SHIFT+2 selects and answers the second ringing call, and so on.</td>
</tr>
<tr>
<td>SHIFT+1..9</td>
<td>Select an active call and click Hold.</td>
<td>Pressing SHIFT+1 selects and places on hold the first active call, pressing SHIFT+2 selects and answers the second active call, and so on.</td>
</tr>
<tr>
<td>SHIFT+1..9</td>
<td>Select a held call and click Retrieve.</td>
<td>Pressing SHIFT+1 selects and retrieves the first held call, pressing SHIFT+2 selects and retrieves the second held call, and so on.</td>
</tr>
<tr>
<td>S or s</td>
<td>Click the Settings link.</td>
<td>This goes from the main page to the Settings page.</td>
</tr>
<tr>
<td>Key</td>
<td>Equivalent Mouse Action</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>----------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>B or b</td>
<td>Click the <strong>Back to Application</strong> link.</td>
<td>This goes back from the <em>Settings</em> page to the main page.</td>
</tr>
<tr>
<td>R or r</td>
<td>Click the <strong>Call History</strong> button.</td>
<td>This opens the <em>Call History</em> dialog box.</td>
</tr>
<tr>
<td>H or h</td>
<td>Click the <strong>Help</strong> link.</td>
<td>This opens this guide in a PDF format.</td>
</tr>
<tr>
<td>SHIFT+L or SHIFT+l</td>
<td>Click the <strong>Sign Out</strong> link.</td>
<td>This signs the user out of the application.</td>
</tr>
<tr>
<td>SHIFT+A</td>
<td>Select <strong>Available</strong>.</td>
<td>This sets the agent’s ACD state to “Available”.</td>
</tr>
<tr>
<td>SHIFT+U</td>
<td>Select <strong>Unavailable</strong>.</td>
<td>This sets the agent’s ACD state to “Unavailable”.</td>
</tr>
<tr>
<td>SHIFT+W</td>
<td>Select <strong>Wrap-Up</strong>.</td>
<td>This sets the agent’s ACD state to “Wrap-Up”.</td>
</tr>
</tbody>
</table>
Index

About Call Center, 96
ACD states, 97
  Changing by agent, 14
Actions on calls, 22
Ad hoc number, dialing, 41
Adding
  Conference participant, 49
  Personal contact, 61
  Speed dial number, 62
Agents
  ACD states, 97
  Changing ACD state by, 14
  Selecting call centers to monitor, 69
Answering call, 39
Application policies, configuring, 89
Application settings, configuring, 89, 90
Assigning disposition codes, 39
  Current call, 39
  Wrap-Up, 39
Auto Answering calls, 40
Blind escalating call, 47
Blind transferring calls, 44
Busy Camp On, 44
Call Center
  Client, agent, 7
  Configuring, 84, 85
  Getting started, 9
  Launching from web portal, 9
  Overview, 7
  Selecting for monitoring by agent, 69
  Setting up, 13
  Signing in, hot desk, 11
  Signing in, web browser, 10
Call Centers
  Monitoring by agent, 67
  Order in agent’s Dashboard, 70
Call Console, 19
  Call states and actions, 22
  Conference Call panel, 21
  Current calls, 21
  Dialer, 20
  Header bar, 20
Call History, 29
  Deleting, 51
  Dialing from, 43
  Managing, 51
  Viewing, 51
Calls
  Action buttons, 32
  Answering, 39
  Assigning disposition codes, 39
  Auto Answering, 40
  Blind escalating, 47
  Blind transferring, 44
  Camping, 44
  Dialing
  Ad hoc number, 41
  Contact, 42
  History, 43
  Search, 43
  Dragging and dropping, 37
  Emergency, 46
  Ending, 41
  Escalating, 46
    Conference and handover, 47
    Consultation, 47
    Mid-conference hold, 48
  Event log, configuring, 93
  Making outbound, 41
  Managing, 34
  Managing conference, 48
  Open URL, 40
  Operations quick reference, 35
  Placing on hold, 44
  Redialing number, 42
  Resuming held, 44
  Saving vCard, 40
  States, 99
  States and actions, 22
  Transferring, 44
  Transferring to queue, 45
  Transferring with consultation, 45
  Types, 99
  Viewing, 37
Camping calls, 44
Changing
  ACD state, 14
  Password, 14, 85
Common panel, 25
Conference
  Adding participant, 49
  Ending, 50
  Ending participant, 50
  Escalating call, 47
  Holding, 49
  Holding participant, 50
  Leaving, 50
  Managing, 48
  Resuming, 50
  Resuming participant, 50
  Starting, 49
  Three-Way, 49
Conference Call, panel, 21
Configuring
  Application policies, 89
  Application settings, 89, 90
  Call Center client, 84
  Call event log, 93
  Call notification settings, 91
  E-mail messaging, 94
  General settings, 85
  General settings, account, 85
  Hotel Guest, 86
  Language, 86
  LDAP settings, 92
  Messaging, 94
Speed dial numbers
  Adding, 62
  Deleting, 64
  Managing, 62
  Modifying, 63
Speed Dial panel, 26
Starting Three-Way Conference, 49
States
  ACD, 97
  Calls, 99
  User’s phone line, 98
Supervisors
  Monitoring phone state, 65
  Panel, 26
  Phone states, 65
  Selecting to monitor, 65
Transferring calls, 44
  Blind, 44
  Consultation, 45
  Queue, 45
URL, opening for a call, 40
User interface
  Action buttons, 32
  Call Console, 19
  Call History, 29
  Common panel, 25
  Conference Call panel, 21
  Contacts pane, 22
  Controls, 30
Custom directory panel, 27
Dialer, 20
Directories panel, 28
Enterprise/Group panel, 25
Header bar, 20
Logged user state, 18
Outlook panel, 27
Personal panel, 25
Queues panel, 26
Search panel, 24
Speed Dial panel, 26
Supervisors panel, 26
VCard, saving, 40
Viewing
  Call History, 51
  Calls, 37
  Contacts, 54
  Current calls, 37
  Directory, 54
  Incoming call details, 38
Web browser sign in, 10
Workspace
  Call Console, 19
  Call History, 29
  Configuring settings, 87
  Contacts pane, 22
  Controls, 30
  Exploring, 16
  Logo pane, 17