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Call Center Administrator Guide

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Call Center Administrator Guide

Setting up a Call Center

There are multiple levels to your managedIP Call Center. The levels are set up in the following format: Enterprise > Group > Call Center > Users.

The Enterprise level is the highest level within managedIP Call Center and has links and configurations for all locations/call centers for your business. Enterprises with multiple sites (or groups) can have a call center created in any site. However, if the call center supports multiple sites, it is suggested that it be part of the main site for better management. Some specific features are configured at the Enterprise level and become the default for the rest of the users.

The Group level contains the users assigned to a location or call center. A group can, but is not required to, contain a call center.

The Call Center level contains all the configurations and users assigned to a call center queue.

The User level contains the individual configurations for a specific user or phone number. Users within Call Center come in two forms: Agents and Supervisors. Agents are users who have been assigned to call centers. Supervisors are users who are responsible for call center queues and agents. They can act as agents as well.

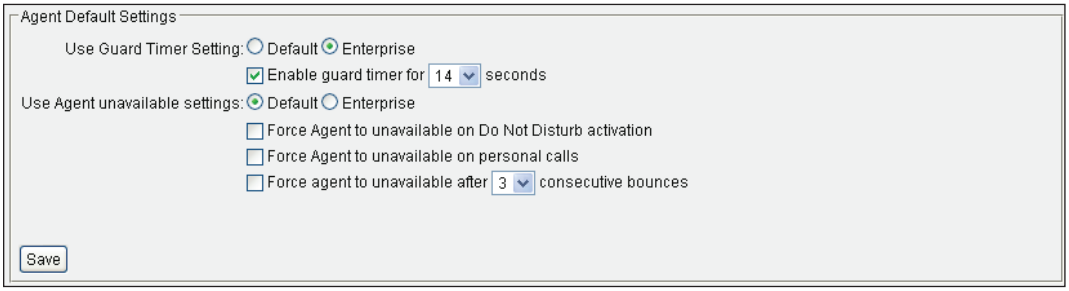
Enterprise Settings

To begin configuring your call center queue, go to the **Profile** page. Here, you can set up the basic options of your queue as well as assign users and settings. To save any changes or updates that you make on this page, click the Save button on either the top or bottom of the page.

AGENT DEFAULT SETTINGS

Guard Timer–The Guard Timer is an Agent Default Setting that, when enabled, delays the delivery of a new Automatic Call Distribution (ACD) call until the timer expires. It is designed to prevent a new ACD call from being presented to the agent immediately after they end the previous call.

When configured at the Enterprise level, agents will receive default settings for the Guard Timer and Unavailable Settings.



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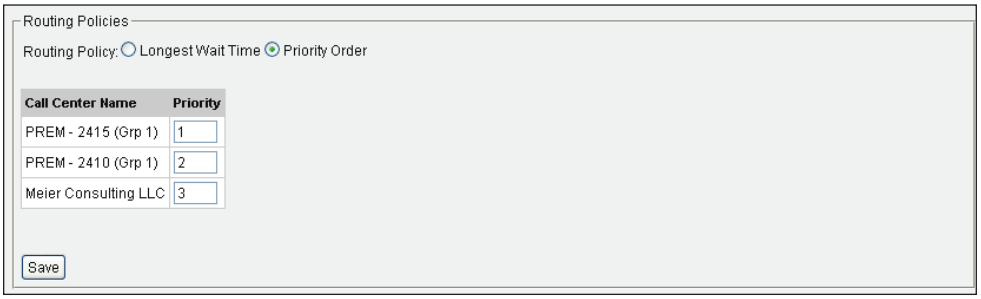
GUARD TIMER SETTING:

1. Select **Default** or **Enterprise**. If selecting Enterprise, all call center queues will share the enabled Guard Timer setting configured here.
2. To change the number of seconds for the Guard Timer, click the drop-down menu and select a number between 1-25 seconds.
3. Click **Save**.

ROUTING POLICIES

How calls are routed to agents can be configured in the Routing Policies section of the screen. Calls received by the call center are placed in the queue based on the call's priority and the wait time. The wait time of a call corresponds to the time elapsed from the moment that the call enters a queue to the moment the call exits the queue. Select one of two options:



- **Longest Wait Time** - When this setting is selected, the longest waiting call is selected and delivered to the agent (across all queues the agent is staffing).
- **Priority Order** - If this setting is selected, then a list of precedence is configured among the queues of the group/enterprise. The call from the highest precedence queue the agent is staffing is selected and delivered to the agent.

Click **Save** to keep your changes.

For examples of how these features are used, please see the Use Cases section.

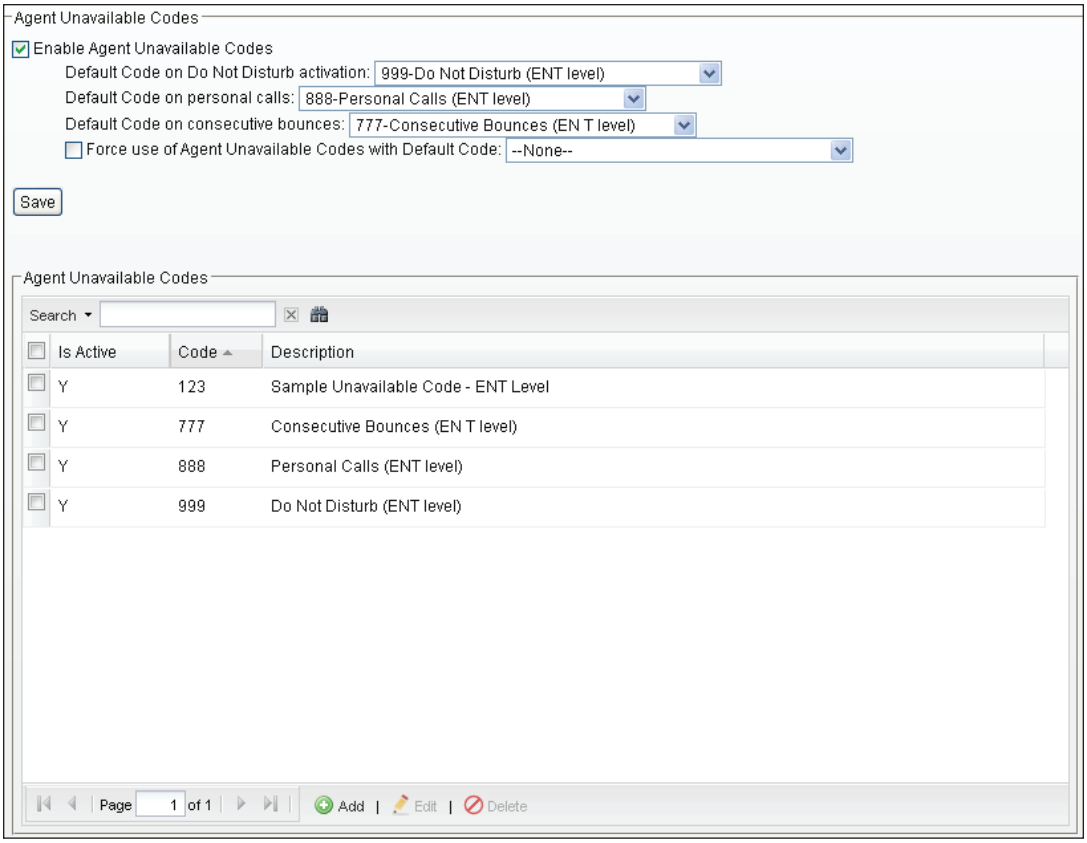
For queue specific routing policies, see the Call Center Settings section.

AGENT UNAVAILABLE CODES

Agent unavailable codes are configurable attributes that are applied when an agent becomes unavailable. Agents may select a reason for changing their agent (ACD) states to Unavailable (for example, on lunch, in the bathroom, taking a coffee break or a personal break). Call center managers can use this data to better understand the performance of their agents.

Each company may define many agent unavailable codes to track the performance of agents. These codes are usable by all the queues in the company.

Unavailable codes are also known as Reason Codes or Walk-away codes. The agent unavailable code creates additional attributes that are applied when a call center agent goes to the Unavailable state. There are many reasons why agents change their states to Unavailable. With the new attributes, call center supervisors have more information to monitor the performance of their agents. The agent unavailable codes contain two elements: an identification value and a description.



CALL DISPOSITION CODES

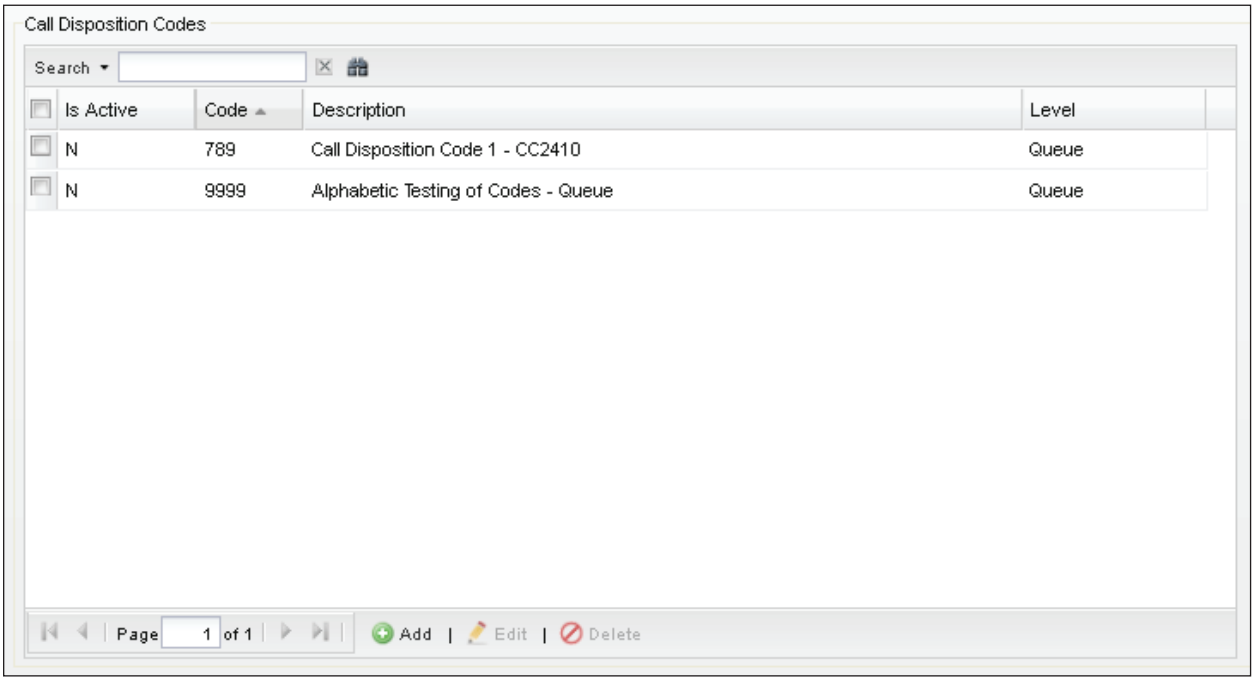
Disposition codes provide agents with the possibility to enter disposition codes for a call center call. The purpose of these codes is to associate a given call center call with a marketing promotion or other elements.

The disposition codes contain two elements: an identification value and a description.

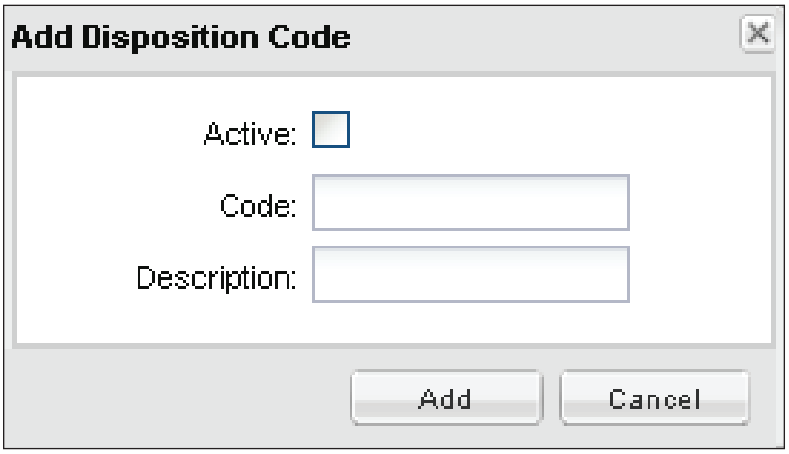
Disposition codes can be created at the enterprise for the enterprise model (under Call Center) and at the call center level (under Profile > Call Disposition Codes).

Disposition codes may be entered by the call center agent while the call center call is in progress or once the call has been finished and the call center agent is in Wrap-up state. When the agent enters the disposition code while the call is in progress, the agent selects the call identification as well as the disposition code. The agent may be involved in several ongoing calls and therefore the call identification is required to ensure that the entered disposition code is associated with the appropriate call center call. When the agent enters a disposition code while in Wrap-up state, the agent provides only the disposition code.

Here you can add, edit, or delete your call disposition codes. The disposition codes contain two elements: a code and a description.



To add, simply click on the **Add** button. You will then see the following screen:

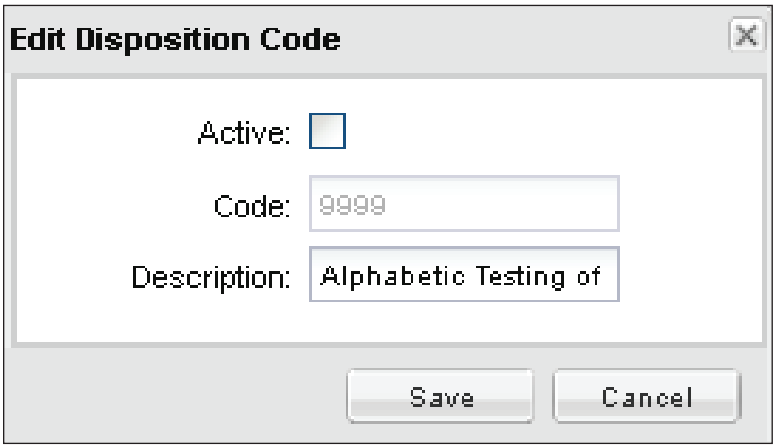


1. Check the **Active** box to make the code active

2. Enter the numerical code value

3. Enter a description for tracking purposes

Here is an example:



You may also edit and delete your call disposition codes. Click **Save** to apply any changes.

Call Center Settings

To set up a call center queue at the Group level:

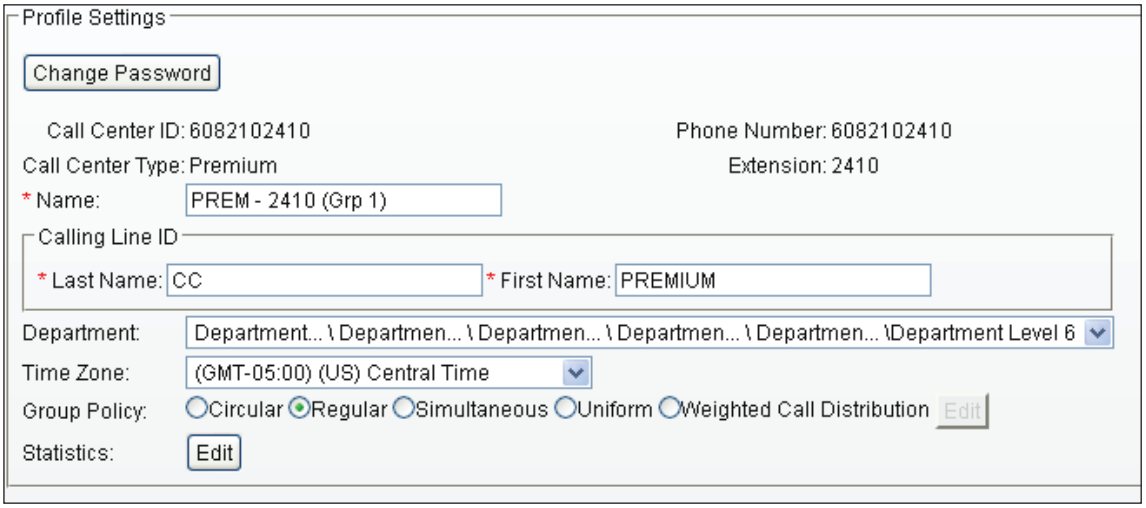
1. Select **Group Services – Call Center**.

2. Select the call center/queue you wish to modify from the drop-down list.

3. Begin configuring your call center queue in the **Profile** page.

PROFILE SETTINGS

In this section of the Profile screen you can set up the basic call center queue options as well as assign users and settings. To save any changes or updates that you make on this page, click the **Save** button on either the top or bottom of the page.



- **Change Password** - In this section of the Profile page, you can configure the web access and voice portal passwords associated with the call center queue. Each call center supervisor will be required to enter the web portal password for each queue they are supervising within the supervisor client configuration. By doing so, the supervisor has access to real time queue statistics. The Voice Portal Passcode is used to access the call center Voice Messaging service (optional).

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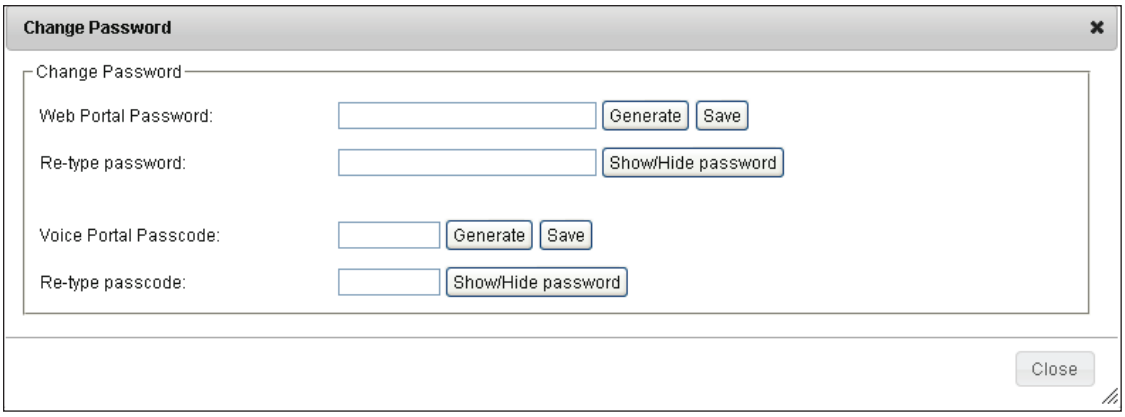
To change passcode settings, click the **Change Password** button. The following screen will display:



- **Name** - This is the name associated with the call center queue.
- **Calling Line ID (First, Last Name)** - This is the information that will be presented to your agents when an inbound call is received, enabling them to identify the specific queue the caller is in.
- **Department** - If you use Departments and/or Department Administrators, select the department you want to associate this call center with.
- **Time Zone** - This is the Time Zone used by the call center queue.
- **Group Policy** - This is how inbound calls will be routed when placed within the queue. There are multiple options:
  - **Circular:** Incoming calls route to agents in the order they appear on the Assigned Users list. When the search reaches the end of the list, it loops back to the top and continues until it has tried all users.
  - **Regular:** Incoming calls route to agents in the order they appear on the list, always starting from the first/top agent.
  - **Simultaneous:** Incoming calls alert all agents at the same time. The first agent to answer handles the call.
  - **Uniform:** Incoming calls route to all agents in order, starting with the agent who has been idle the longest.
  - **Weighted Call Distribution:** Incoming calls are assigned to idle agents based on percentages you assign on this page.

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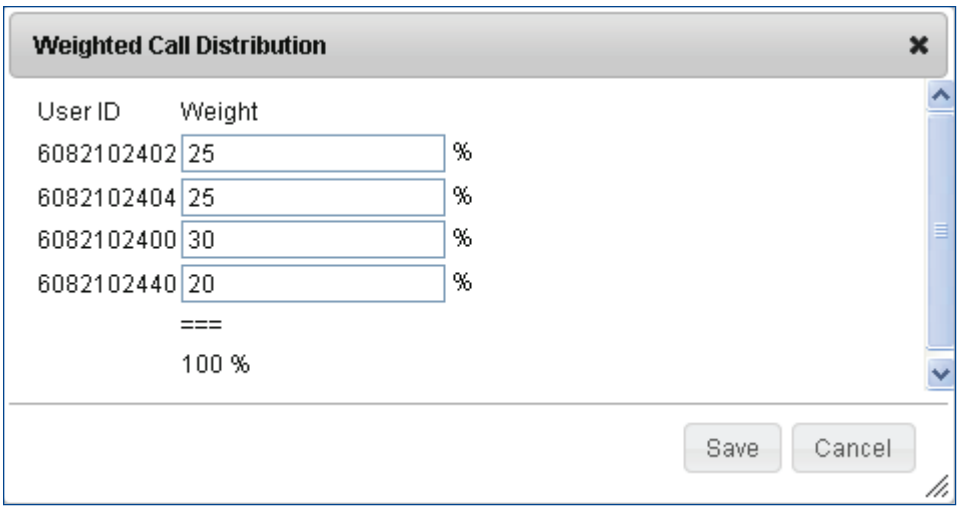
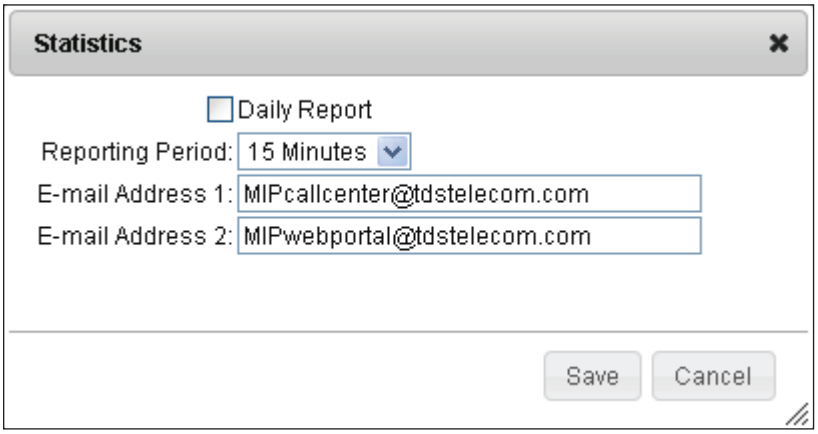


- **Statistics** - Call Center Statistics allows you to view the statistics of your call center queue and configure statistics reporting.

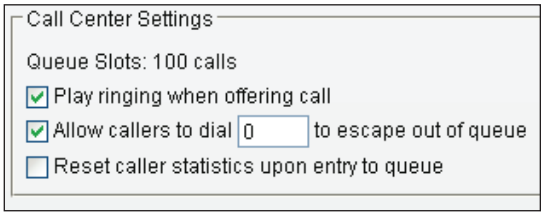


- **Daily Report** - Check the box to enable statistical reporting for this queue. Uncheck the box if no daily statistical report is required.
- **Reporting Period** - From the drop-down, select the period and interval you would like to collect statistics about.
- **Email Addresses** - Enter up to two email addresses to receive the daily statistics report.

Click **Save** to save any changes.

Call Center Settings

Within the Call Center Settings area, you will see your available number of queue slots for taking inbound calls and be able to configure options for those calls.



- **Queue Slots** - Set a limit for the number of calls the system keeps on hold in queue.

NOTE: This setting represents the number of queue slots you have purchased and may not be modified.

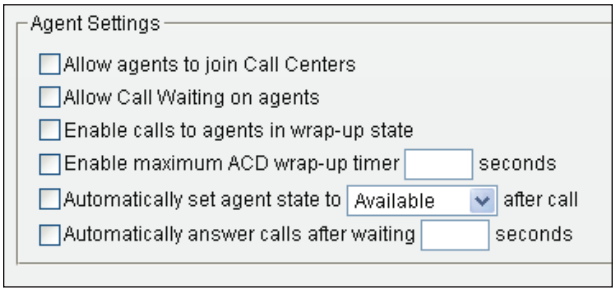
- **Play ringing when offering call** - Check or uncheck this option if you would like to ring the agent's phone when offering a call.
- **Allow callers to dial X to escape out of queue** - By selecting this option, callers will have the ability to press a number to escape the queue. The system default is "0", but it can be changed by entering a different number in the box.

NOTE: Call Treatment will follow Call Forward Busy if enabled in the queue. If not, it will follow Overflow.

- **Reset caller statistics upon entry to queue** - Check or uncheck to reset caller statistics when a caller enters a queue. This can be helpful when trying to gain accurate reporting about a specific call center when you have multiple call centers that interface with each other.

Agent Settings

In this section, you can make changes to all agent parameters.



- **Allow agents to join Call Centers** – This setting allows agents to join or remove themselves from a call center queue via their web portal or their call center client. If this option is not selected, only an Administrator or Supervisor may "join" an agent to a call center.

- **Allow Call Waiting on agents** - Check or uncheck the Allow Call Waiting on Agents box if you want queued calls to wait on busy agent stations when no other agents are available to take the call.

NOTE:

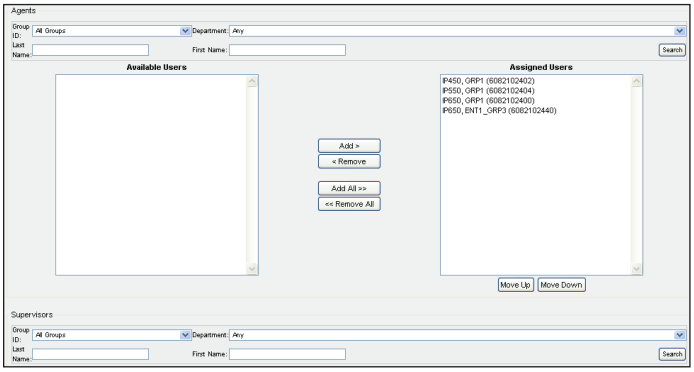
- For this feature to work at the Group level, the feature must be active on a User/Agent level.
- Call center queue calls will not wait if the Group option is not active, even though the User/Agent may have Call Waiting active for non-call center calls.

- **Enable calls to agents in wrap-up state** - If inactive, agents in Wrap-Up state are unavailable and will not receive queue calls.
- **Enable maximum ACD wrap-up timer** – If this option is active, agents in wrap-up state will have a maximum wrap-up time before they are forced to Available state.
- **Automatically set agent state after call** – When selected, this will force the agent's status to change after the call to the option selected in the drop down.
- **Automatically answer calls after waiting** - When selected, this will force the call to be answered by an agent after waiting a predetermined number of seconds set by the Call Center Administrator.

Assigning Users

AGENTS

Assigning Users allows an administrator to select the agents for a call center queue.



To add one or more Assigned Users:

1. Select agents from the list of **Available Users** on the left of the window.
2. Click **Add** or **Remove** to assign Users to a call center.
3. Click **Save** to save selection.

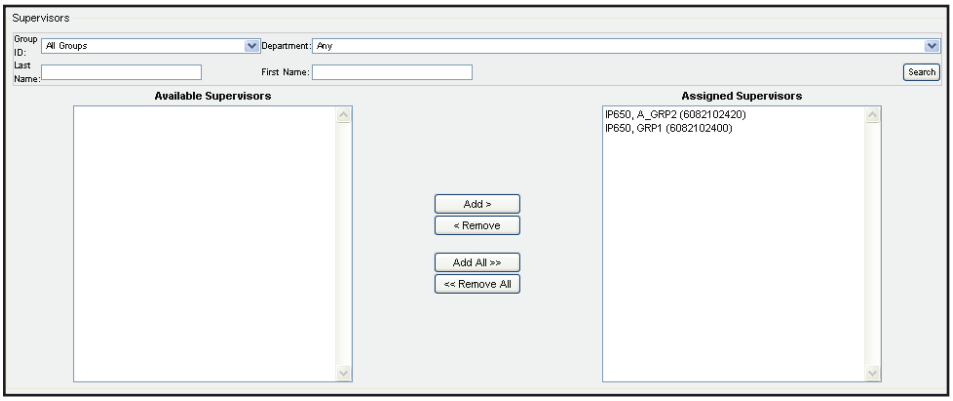
Depending on the policy assigned to this call center queue, the system may route calls to agents in the order they are listed in the Assigned Users column.

- To move a user up in the list, click the name in the Assigned Users column and click **Move Up**.
- To move a user down in the order, click a name in the Assigned Users column and click **Move Down**.

Click **Save** to keep your changes.

SUPERVISORS

The Supervisor area of the Profile page allows an administrator to select the supervisors for a call center queue.



To add one or more Assigned Supervisors:

1. Select from the list of **Available Supervisors** on the left of the window.
2. Click **Add** or **Remove** to assign a supervisor to a queue.

NOTE: Only users that have purchased the optional Call Center Supervisor option will display in the Available Users window.

3. Click **Save** to save selection.

Call Center Features

ASSIGNED SERVICES

This area will display the complete list of the services purchased for the current queue.

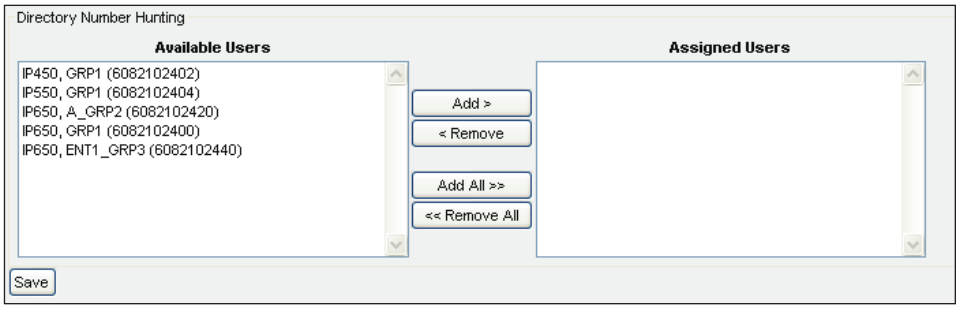
Directory Number Hunting

This feature enables you to route all User/Agents Direct Inward Dial (DID) calls to the Call Center queue.

When a User/Agent is assigned this feature, the User will no longer receive DID calls to their own station. In other words, all calls directed to their number will route to the call center queue and receive the same treatment as calls routed to the queues designated number. Please note that this option will override the Users routing and call handling options, including Voice Messaging, Call Forward (all types), and other advanced features (Simultaneous Ring, Remote Office, Sequential Ring, etc.).

To assign Directory Number Hunting to a User/Agent:

1. Select the User in the **Available Users** column.
2. Click **Add** to assign the user this feature.
3. Click **Save**.



QUEUE STATUS & ALERTS

This feature is not supported at this time.

CODING INBOUND CALLS

Call Disposition Codes are not currently supported.

Announcements & Music On Hold

When a call is received by your call center queue, various audio announcements can be played to the caller. Default audio files are provided for each announcement/treatment. You can create custom announcements that can be loaded or retrieved by selecting:

- **Load custom files** – These are .wav files that are loaded directly via the Call Center web page.
- **Uniform resource locator (URL)** is not supported at this time.

You also have the ability to load up to four custom audio files for each announcement. This enables the use of announcement fragments that can be shared across multiple services. To record greetings, please see the **Uploading a Greeting** or **Music on Hold** section. Once recordings are complete, you can set up your announcements.

To begin setting up your announcements and music on hold, click on **Profile > Announcement Messages**.

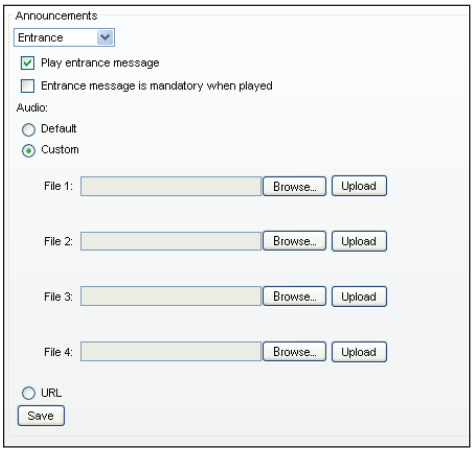
ANNOUNCEMENTS

The Announcements page allows you to select multiple announcement types: Entrance Message, Estimated Wait Time, Comfort Message, Music On Hold, and Call Whisper. To select which message you will edit, please select the drop-down menu.

NOTE: Changes to the main Call Center Announcements and Music On Hold will be applied to any associated Dialed Number Identification Service (DNIS) numbers. Please see the DNIS section for more information.

Entrance Message

You can select an entrance message for inbound calls to hear before they are placed in queue.

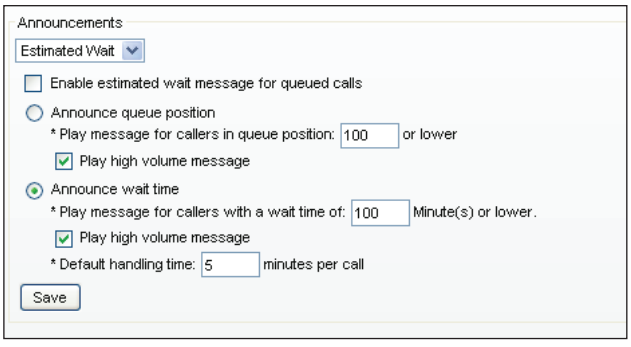


- **Play entrance message** – Check or uncheck to select to use an entrance message.
- **Entrance message is mandatory when played** – By selecting this, customers will not be able to exit the queue without listening to the entire entrance message.
- The **Audio** section allows you to select a specific entrance message. Choose from the following options:
  - **Default** - Callers hear the following default message: "Your call is very important to us, please wait for the next available agent or press zero to leave a message."
  - **Custom** – Callers hear a custom message you have recorded and have saved as a .wav file. To load a custom file:
    1. Click in **Load Custom Audio Announcement** field and browse to select your custom .wav file.
    2. After selecting the file, click **Upload** to upload the file.
    3. Click **Save**.
  - **URL** – This is not a supported feature at this time.

Estimated Wait

The Estimated Wait Message (EWM) provides queue information to the caller. When a new call is added to the call queue, the EWM is played after the entrance message but before any other announcement. If the entrance message is disabled and the EWM is enabled, the EWM is played.

The estimated wait message announcements are localized according to the statistics of the queue. If the caller overflows to another queue, they hear a new EWM if the message is enabled.



- **Enable estimated wait message for queued calls** – Check or uncheck to enable estimated wait messaging.This announcement has two modes of operation:
  - **Announce queue position:** In this case, the caller is informed of their current position in the call queue (for example, "You are caller number 12 in the queue"). To enable:

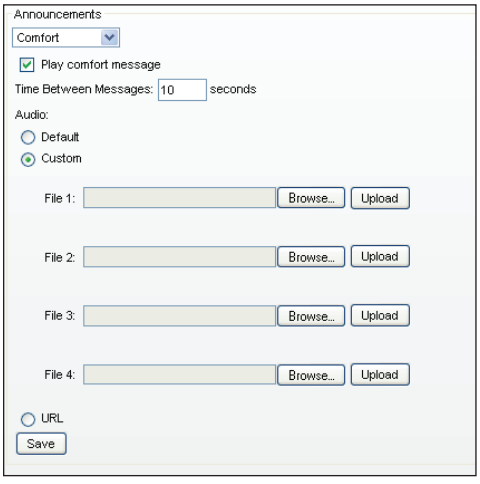
1. Select the radio button for **Queue Position**.
2. Next, set a threshold for what queue position or lower a caller should hear the EWM. You can also check or uncheck the option to play a high volume EWM.
3. Click **Save**.

- **Announce wait time:** In this case, the caller is given an estimated number of minutes they will wait for their call to be answered by an agent (for example, "Your estimated wait time is 5 minutes"). To enable:

1. Select the radio button for Wait Time.
2. Set a threshold for what wait time or lower a caller should hear the EWM. You can also check or uncheck the option to play a high volume EWM.
3. Set the default handling time, as this will calculate the wait time for the caller.
4. Click Save.

Comfort Message

These messages are played to the caller after the Entrance Message. The Comfort and Music on Hold messages keep playing to the caller in a loop until the call is answered by an agent or until action is taken by a Routing Policy (for example, Overflow).



- **Play comfort message** – Check or uncheck to enable comfort messaging.
- **Time between messages** – This defines the frequency and interval that the Comfort Message is played

- The **Audio** section of the screen allows you to select a Comfort message from the following options:

  - **Default** - Callers hear the following default message: "Your call is very important to us, please wait for the next available agent or press zero to leave a message."

  - **Custom** – Callers hear a custom message you have recorded and have saved as a .wav file.

    1. Click in the **Custom** field and browse to select your custom .wav file.

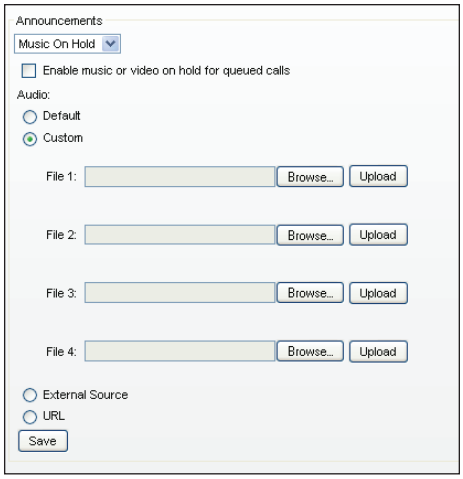
    2. After selecting the file, click **Upload** to upload the file.

    3. Click **Save**.

  - **URL** – This is not a supported feature.

Music On Hold

These messages are played to the caller after the entrance message. The Comfort and Music on Hold messages keep playing to the caller in a loop until the call is answered by an agent or until action is taken by a Routing Policy (for example, Overflow).



Enable music on hold for queued calls – Check or uncheck to enable Music on Hold.

- The **Audio** section of the screen allows you to select the Music on Hold message from the following options:

  - **Default** – Callers hear the default Music on Hold audio message.

  - **Custom** – Callers hear a custom message you have recorded and have saved as a .wav file. To set a custom message:

    1. Click in the **Custom** field.

    2. Browse to select your custom .wav file. After selecting the file, click **Upload** to upload the file.

    3. Click **Save**.

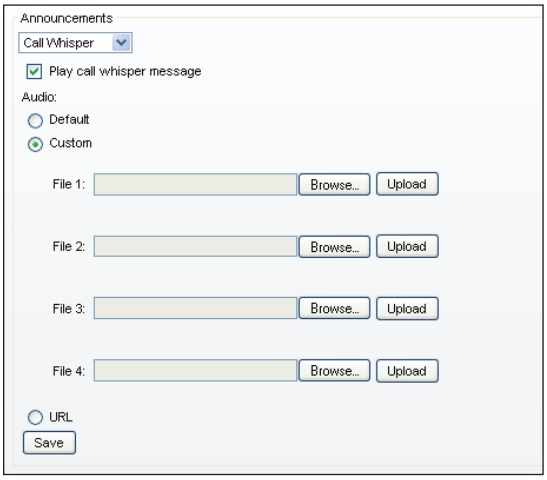
  - **External Source** – This is not supported at this time.

  - **URL** – This is not supported at this time.

Call Whisper

The Call Whisper message is played to the agent immediately before the inbound call is connected.

The message typically announces which call center queue the call is coming from. This is especially important when using Direct Number Identification Service (DNIS). For example, ten separate numbers can all be routing to a single queue. Each of the ten numbers can have their own customized Call Whisper message. This allows the agent to know which number was dialed and provide the appropriate greeting (without the need to look at their phone or directory).



- **Play whisper message** – Check or uncheck to enable Call Whisper.
- The **Audio** section of the window lets you select a Whisper message from the following options:
  - **Default** - Agents hear the default Call Whisper audio message.
  - **Custom** – Agents hear a custom message you have recorded and have saved as a .wav file. To use a custom message:
    1. Click in the **Custom** field and browse to select your custom .wav file.
    2. After selecting the file, click **Upload** to upload the file.
    3. Click **Save**.
  - **URL** – This is not a supported feature.

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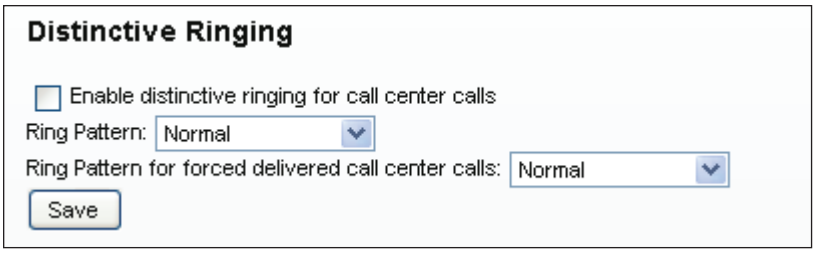
Inbound Call Handling

Distinctive Ringing

This policy provides a distinctive ring to a call when it is routed from a queue. Distinctive ringing patterns can be used with Call Center so agents can distinguish between an ACD-related call, a direct dialed call, and calls from different queues.

To access this feature, click on **Profile > Distinctive Ringing**.



- **Enable distinctive ringing for call center calls** – Check or uncheck to enable distinctive ringing for the current call center.
- **Ring Pattern** – There are four different patterns to choose from: Normal, Long-Long, Short-Short-Long, and Short-Long-Short.
- **Ring Pattern for forced delivered call center calls** – Select one of the four patterns to associate with the calls that are force forwarded.

Click **Save** to apply any changes.

Direct Number Identification Service (DNIS)

Call centers have the capability to be associated with multiple DNIS numbers. DNIS allows a single combined queue to distribute calls to agents and also prioritize these calls so that more important calls are distributed first. DNIS lets calls be tagged so that an agent knows what number the caller dialed. This allows a single queue to support multiple call centers without the caller knowing that they have been combined into a larger group. In addition to the primary number, 63 different phone numbers are assignable to a call center.

Priority is attached to an incoming call based on the DNIS number on which it is received and the wait time if the call is transferred from another call center. The calls are distributed to the agents staffing the queue based on this priority, with calls of the highest priority being exhausted before calls in the next priority group. TDS provides the ability to promote calls from a lower priority to a higher priority if the calls have been waiting long enough. The supervisor can also promote calls using the Supervisor client. This prevents the lower priority calls from being stranded in the queue during periods of high traffic.

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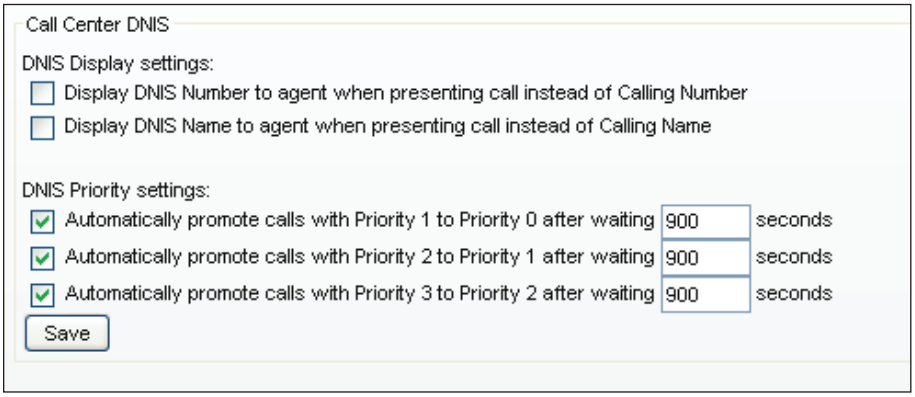
All the treatments available to a queue can be customized based on the DNIS number. This provides more differentiation for the caller and also provides the agent with additional information about when the call was received.

Use multiple DNIS numbers with a call center when the Agents and Routing policy apply to all the DNIS numbers. For example, when a single pool of agents handles calls for multiple inbound numbers, the calling party receives custom greetings associated with each DNIS number. The agent sees the DNIS number when the call is offered, allowing them to provide the appropriate greeting.

You can find your DNIS settings by selecting **Profile > Call Center DNIS**.

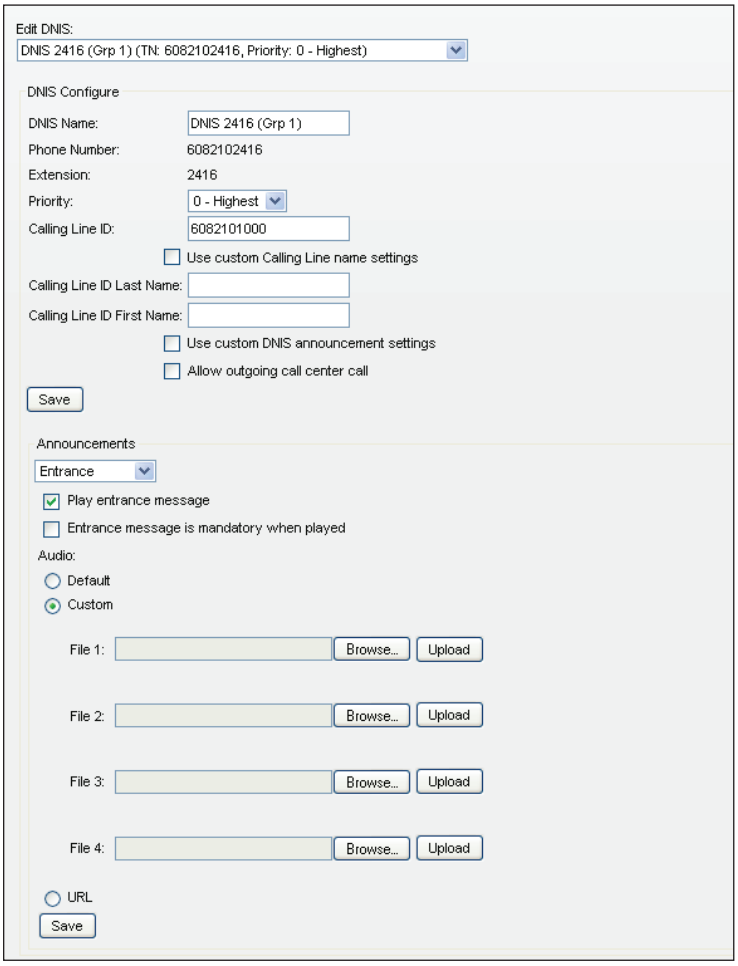


- **Display DNIS Number** - Check or uncheck to display the DNIS number instead of the calling number.
- **Display DNIS Name** - Check or uncheck to the DNIS name rather than the calling name.
- **DNIS Priority Settings** – These fields are used to determine the thresholds for promoting calls from one DNIS priority to another. The settings prevent call "starvation", where a call could remain queued for a long time if there are always calls coming into the queue with higher priority. To use this feature:

    1. Select the check boxes to enable and enter time in seconds.
    2. Click **Save** to complete any changes.

EDITING DNIS

This area allows you to edit options for individual DNIS numbers. Begin by selecting the DNIS number you would like to edit by opening the drop-down menu beneath **Edit DNIS**.



- **Priority** - Select the priority level for the DNIS from the following options: Highest, High, Medium, and Low.
- **Calling Line ID** – Select this option to provide a display phone number. This number is used instead of the DNIS phone number for display purposes.
- **Calling Line Last/First Name** - Select this option if a custom calling name should be used for display purposes.

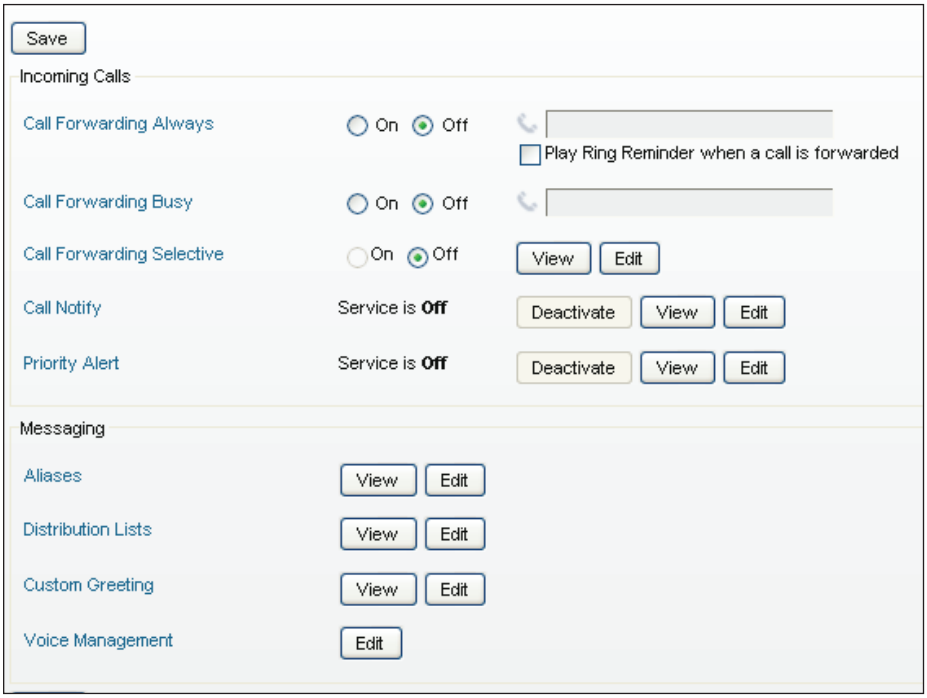
  - **Allow outgoing call center call** - Select this option if agents staffing this call center are allowed to initiate outbound call campaigns for this DNIS.

Click **Save** to apply any changes.

Announcements - For information on configuring Announcements for DNIS, see the Announcements & Music on Hold section.

Calling Features

You can access your Call Center's Calling Features by selecting **Call Features** > **All Services**.

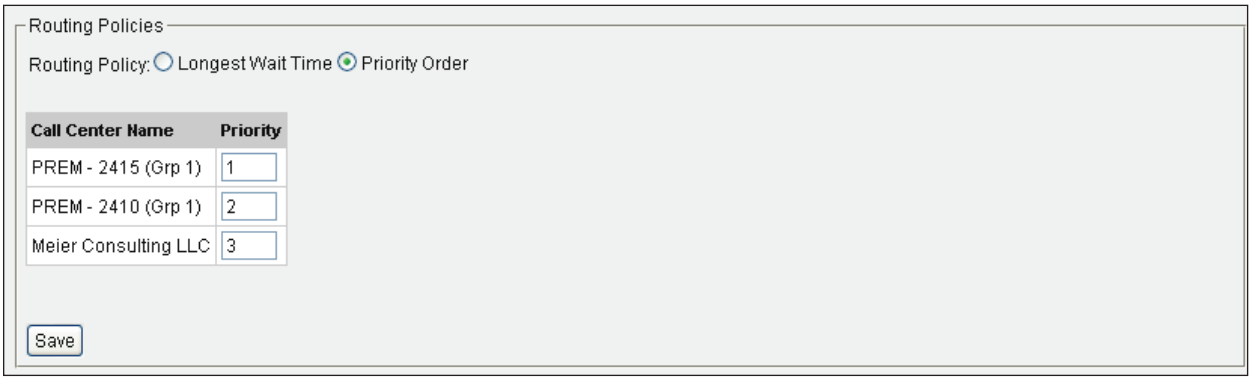


For more information on these services, please see the managedIP Administrator User Guide.

Routing your calls

Main Routing Policies

You can see routing options at the Enterprise level by selecting **Call Center** > **Routing Policies**.



- **Longest Wait Time** - When this setting is selected, the longest waiting call is selected and delivered to the agent.
- **Priority Order** - If this setting is selected, then a list of queue precedence is configured from all the queues of the group/enterprise. The call from the highest precedence queue that the agent is staffing is selected and delivered to the agent.

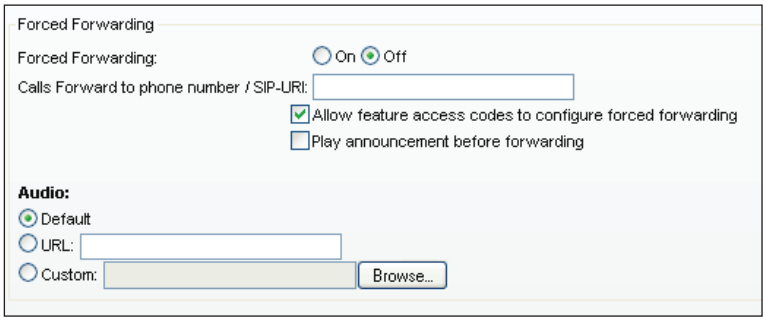
For examples of how these features are used, please see the **Use Cases** section.

Alternate Routing Policies

You can see alternative routing options at the Group level by selecting **Profile > Routing Policies**.

FORCED FORWARDING

The Forced Forwarding policy is useful when there is an emergency or no agents are available to staff a call center. The administrator or supervisor can temporarily redirect all new calls to an alternate call center until the situation is resolved.



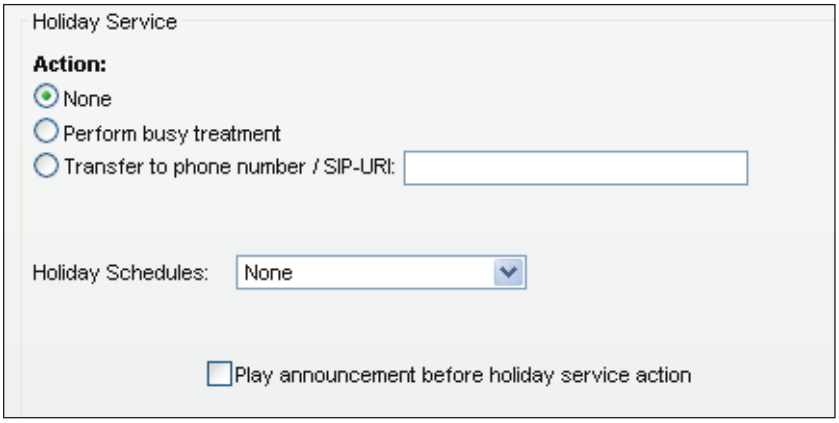
If the option is enabled, then incoming calls to the queue are forwarded to the configured destination. Calls already in the queue remain queued. The call center can be configured to play an announcement prior to forwarding the queued calls. In this case, the announcement is played once before forwarding is complete.

- **Forced Forwarding** - Check or uncheck to enable forced forwarding for the current call center.
- **Call Forward to phone number** - Define where you would like calls forwarded.
- **Allow feature access code to configure** - Specify whether feature access codes activate and deactivate the forced forwarding of calls.
- **Play announcement before forwarding** - Check or uncheck to enable an announcement when a call is forced forwarded for the current call center.

  - To configure the announcement for Forced Forwarding, see the **Announcements & Music-On-Hold** section

HOLIDAY SERVICE

You can set parameters for how calls are processed during holiday periods in the Holiday Service area of your screen.



- **Action** – Specify the action to apply to calls during the holiday schedule. The options are: None, Perform busy treatment, and Transfer to phone number/SIP-URI. If using transfer, please enter the applicable destination number.
- **Holiday Schedule** - Specify schedule to be followed for the Holiday Service policy by selecting from the drop-down menu.

NOTE: The schedules listed here are determined on the Enterprise level. For more information on configuring schedules, see the managedIP Administrator User Guide.

- **Play Announcement before holiday service action** - Check or uncheck to enable an announcement when a call goes in to holiday service for the current call center.

  - To configure the announcement for Holiday Service, see the Announcements & Music On Hold section

NIGHT SERVICE

Calls can be processed differently during non-business hours. Business hours are defined as a time schedule at the Group level. The Routing Policy refers to this and applies a specified routing action when a call is received outside of business hours. By default, an "Every Day, All Day" business hour schedule is defined for the queue. For more information on configuring time schedules, please see the managedIP Administrator User Guide.

Manual Night Service can be used for times when the call center closes earlier than usual due to a holiday, special event, or an operational problem.

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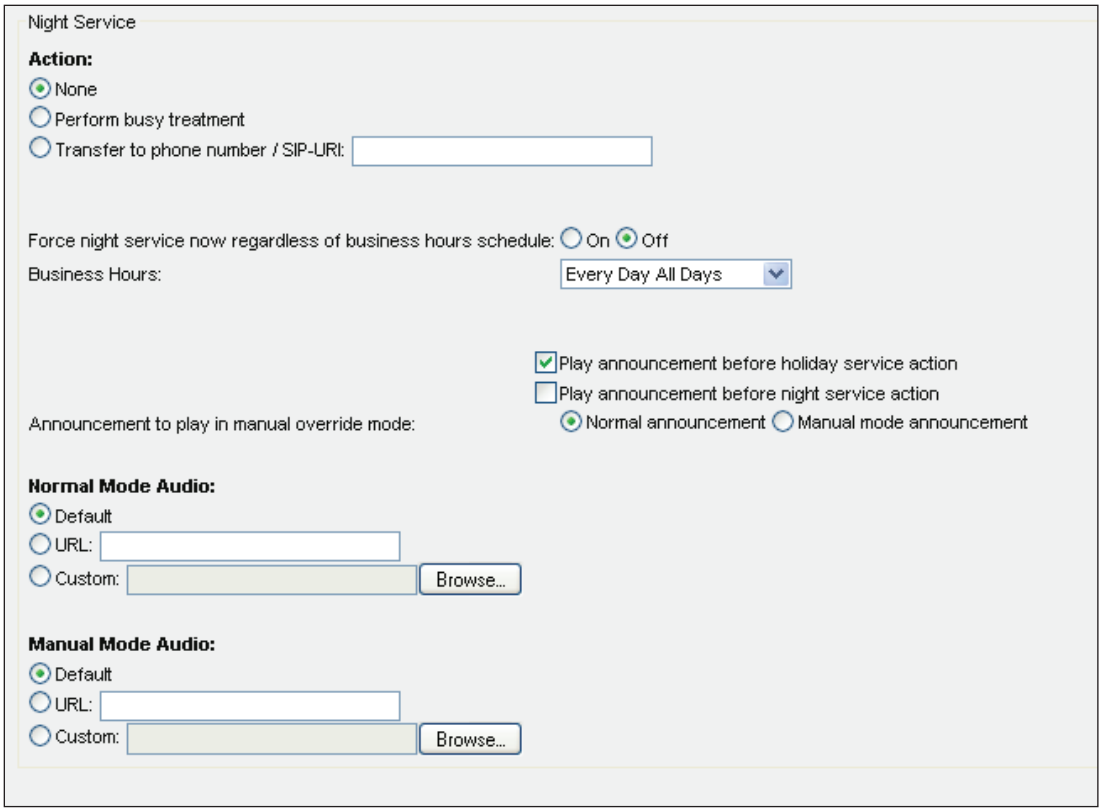


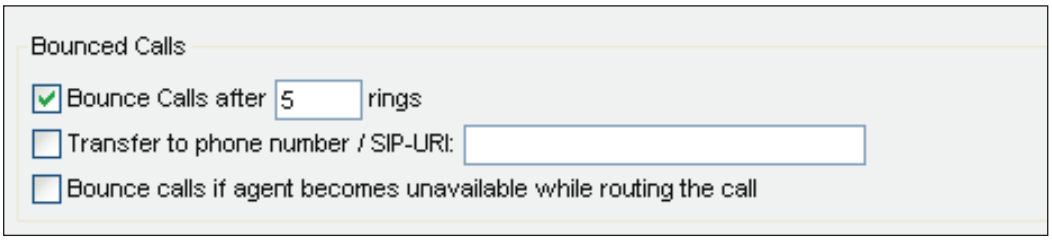
- **Action** – Specify the action to apply to calls during the night schedule. The options are: None, Perform busy treatment, and Transfer to phone number/SIP-URI. If using transfer, please enter the applicable destination number.
- **Force night service** - Specify schedule to be followed for the night service policy using the drop-down menu.
- **Play Announcement before night service action** - Check or uncheck to enable an announcement when a call goes in to night service for the current call center.

  - To configure the announcement for Forced Forwarding, see the **Announcements & Music On Hold** section

NOTE: There are two announcement options available with Night Service when it is manually overriden: Normal announcement and Manual mode announcement. You will need to configure both if allowing manual overrides of Night Service.

BOUNCED CALLS

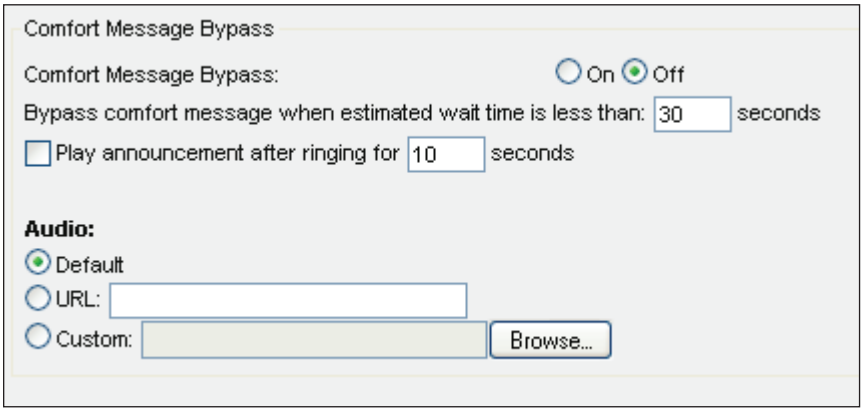
The Bounced Calls section of the screen allows you to configure specific routing behavior if a call offered to an available agent is not answered. A bounced call is a call that is being routed to the agent but for some reason (agent does not answer the call, they change to unavailable, their device is not registered, and so on) the call is not answered.



- **Bounce calls after "X" rings** – Check or uncheck to enable Bounced Calls for the current call center queue and specify the number of rings before a call is bounced.
- **Transfer to phone number/SIP-URI** - Check or uncheck to enable Transfer and then enter the applicable destination number.
- **Bounce calls if agent becomes unavailable while routing the call** - Check or uncheck to bounce calls to an agent who becomes unavailable.

COMFORT MESSAGE BYPASS

At times of low call volume, the Comfort Message Bypass can be enabled for calls that will be answered quickly instead of the usual Comfort/Music on Hold treatments. This policy applies after the Entrance Message has finished playing (if applicable).



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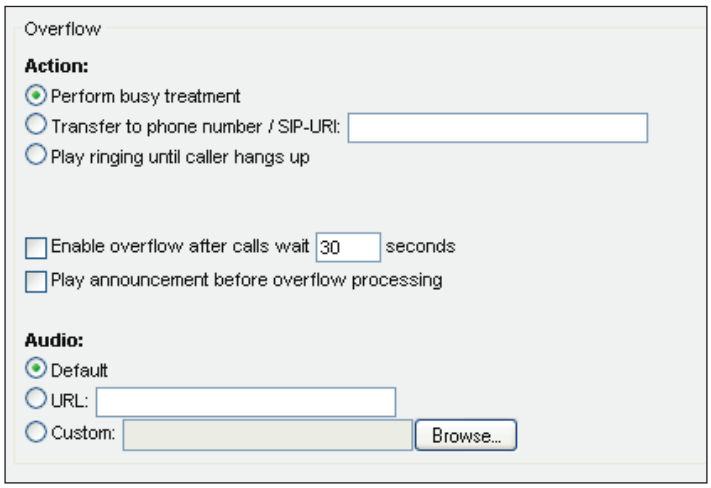
- **Enable Comfort Message Bypass** – Check or uncheck to enable bypassing the comfort message for the current call center.
- **Estimated Wait Time** - Specify the estimated waiting time before the comfort message is skipped.
- **Play announcement after ringing** - Specify whether the comfort message bypass announcement plays after ringing and then the interval after which it plays.
- **Play Announcement before forwarding** - Check or uncheck to enable an announcement when a call is forced forwarded for the current call center.

  - To configure the announcement for Forced Forwarding, see the **Announcements & Music on Hold** section

OVERFLOW

These overflow scenarios occur when a queued call is not handled (either by an agent or by another Routing Policy) within a specified amount of time. The call is removed from the queue and handled according to the related Overflow policy actions.



- **Action** – Specify the action to apply to overflow calls. The options are None, Perform Busy treatment, and Transfer to phone number/SIP-URI. If using transfer, please enter the applicable destination number.
- **Enable Overflow after wait X seconds** - Check or uncheck to enable overflow for the current call center queue and specify the waiting time after which a call is considered an overflow.
- **Play Announcement before performing holiday service action** - Check or uncheck to enable an announcement when a call goes in to overflow for the current queue.

  - To configure the announcement for Forced Forwarding, see the **Announcements & Music on Hold** section

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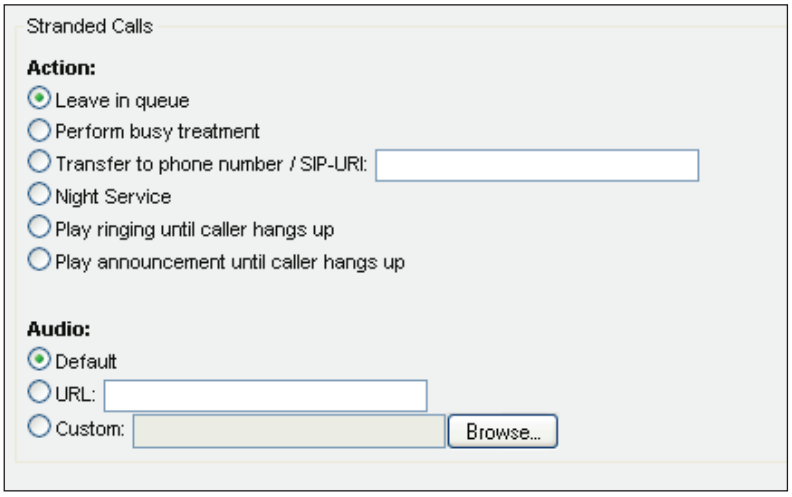
STRANDED CALLS

A stranded call is one that is being assigned to a queue where no agents are currently staffed.

NOTE: An agent is said to be staffing a queue if the agent has joined the queue and is not in the Sign-out state.

If the last agent staffing a queue "un-joins" the queue or signs out, then all calls in the queue become stranded and handled as specified. In particular, if the mandatory Entrance Message option is enabled, then the entrance message is played to completion before the call is handled as a stranded call.



- **Action** – Specify the action to apply to stranded calls during the holiday schedule. The options are None, Perform Busy treatment, Transfer to phone number/SIP-URI, Night Service, Play Ringing until caller hangs up, or Play announcement until caller hangs up.

  - If using transfer, please enter the applicable destination number.

  - If selecting Night Service, please see the **Night Service** section of this guide.

  - If using an announcement, see the **Announcements & Music On Hold** section.

Uploading a Greeting or Music On Hold

Below is the procedure to record a personal greeting or announcement using a PC. Instructions are provided for the following sound recorders:

- Windows 98 Sound Recorder and Windows XP Sound Recorder
- Windows 2000 Sound Recorder
- Windows NT Sound Recorder

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If you are using a different sound recording product, the required format for recordings are:

- CCITT u-Law or A-Law
- 8,000 kHz
- 8-bit mono
- .wav file

To record using the Windows 98 Sound Recorder or Windows XP Sound Recorder:

1. In Windows 98, select **Start> Programs> Accessories> Multimedia> Sound Recorder** from the Windows task bar. In Windows XP, select **Start> All Programs> Accessories> Entertainment> Sound Recorder**

NOTE: It is possible that your Sound Recorder is in a different location, or that your default sound recorder is another product. Please note the required format for your greetings below and follow the instructions for your specific sound recording product.

2. Make the setting selections. Click **Properties** from the File menu. The properties for Sound window appears.
3. Click **Convert Now** and then click **OK**. The Sound Selection page appears.
4. Select **CCITT u-Law** from the Format list.
5. Select **8,000 kHz, 8-bit mono** under Attributes and click **OK**. You may want to save this format at this point, so that you can easily select it in the future.
6. In the Properties for Sound dialog box, click **OK**.
7. Click **Record** on the Sound Recorder. Speaking clearly into your PC microphone, record your message. When you have finished, click **Stop**. To listen to your message, click **Play**. If you are not pleased with your message, record it again.
8. When you are satisfied with your message, select **Save As** from the File menu. Name your sound file, being certain that you remember its location and that the file type is a .wav file.
9. In the File name field, enter the desired name of your recording.
10. Click **OK**. To exit without saving, click **Cancel**.

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To record using the Windows 2000 Sound Recorder:

1. Select **Start> Programs> Accessories> Multimedia> Sound Recorder** from the Windows task bar.

NOTE: It is possible that your Sound Recorder is in a different location, or that your default sound recorder is another product. Please note the required format for your greetings below and follow the instructions for your specific sound recording product.

2. Click **Record** on the Sound Recorder. Speaking clearly into your PC microphone, record your message. When you have finished, click **Stop**. To listen to your message, click **Play**. If you are not pleased with your message, record it again.
3. Click **OK**.
4. Click **Change** to modify the settings. Select **CCITT u-Law** from the Format list. Select **8,000 kHz, 8-bit mono** under Attributes and click **OK**. You may want to save this format at this point, so that you can easily select it in the future. In the Properties for Sound dialog box, click **OK**.
5. When you are satisfied with your message, select **Save As** from the File menu. Name your sound file as .wav file.
6. In the File name field, enter the desired name of your recording.
7. Click **OK**. To exit without saving, click **Cancel**.

To record using the Windows NT Sound Recorder:

1. Select **Start> Programs> Accessories> Multimedia> Sound Recorder** from the Windows task bar.
2. Select **Audio Properties** from the Edit menu. Click on the **Customize** button under Preferred quality. The Customize dialog box appears.
3. In the dropdown menu under Format, select **CCITT u-Law**.
4. In dropdown menu under Attributes, select **8.000 kHz, 8-bit mono**. You may want to save this format at this point, so that you can easily select it in the future.
5. Click **OK** in the Customize dialog. Then click **OK** in the Audio Properties dialog box.
6. Click **Record** on the Sound Recorder. Speaking clearly into your PC microphone, record your message. When you have finished, click **Stop**. To listen to your message, click **Play**. If you are not pleased with your message, record it again.
7. Click **OK**.
8. When you are satisfied with your message, select **Save As** from the File menu. Name your sound file as a .wav file.
9. In the File name field, enter the desired name of your recording.
10. Click **OK**. To exit without saving, click **Cancel**.

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User Tags

The User Tags feature allows the managedIP Administrator to make changes and modifications to phone features and functions on a per-user, per-phone basis. This enables the Administrator to provide specific customizations for individual users to help improve the usability of the phones.

TO CHANGE A TAG VALUE:

1. Select the Group.
2. Select a telephone number from the User dropdown filter.
3. In the Device section of the Profile page, click **Modify Tags**. A pop-up window containing the list of available tags with the current tag value will appear.
4. Locate the tag to be changed and update the new value of the tag. Tag descriptions are shown below.
5. Click **Save**.
6. Click **Rebuild Device Config File**.
7. Verify that the message "Device config file successfully rebuilt" is displayed.

NOTE: For the changes to take effect, the phone must be reset. Rebooting the phone will disconnect any call that may be in progress. Also, different phone models may have different tags available to them. The table at the end of this document contains a complete list of tags and the availability of tags by phone.

Agent Web Portal Settings

JOINING A CALL CENTER AND CHANGING CALL CENTER STATE

As an Agent, you have the ability to join a Call Center queue in order to receive calls.

To join a call center and change your status:

1. At the User level, select **Calling Features – Call Control**.
2. Click the **View Call Centers** button to the right of **Call Center – Agent**. The button will then change to **Hide Call Centers**.

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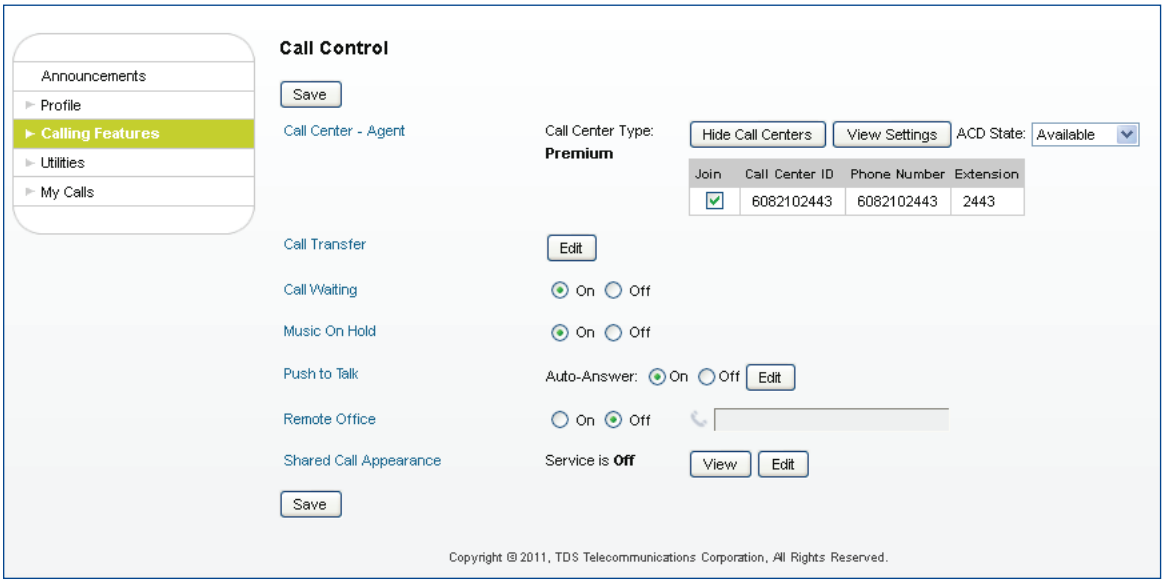


3. Click each box under the header titled **Join** to join the Call Center(s) you wish to join and then select the ACD state and unavailable code from the dropdowns.

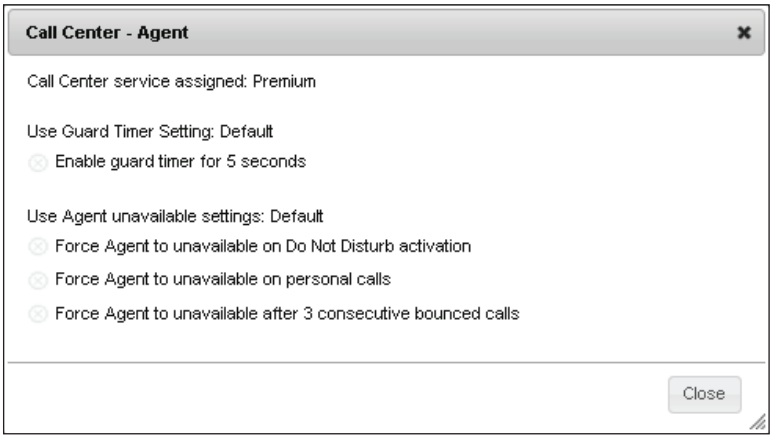
4. Click **Save**.

> **NOTE:** Basic Agents are not able to change their State (available, unavailable, etc.), but can join any queues they are assigned to (if permitted by the administrator).

CHANGING AGENT SETTINGS

To change Guard Timer or Unavailable Settings:

1. Click the **Edit** button to the right of Call Center – Agent. The following screen will then pop up:



2. Check or uncheck the boxes to change the Guard Timer Settings.

3. Click **Save**.

For more information on configuring Guard Timer and Unavailable Settings, please see the **Agent Default Settings** section.

FEATURE ACCESS CODES

There are a number of Feature Access Codes that can be entered in to your phone that directly apply to Call Center functionality. They are as follows:

Escalate Call to Supervisor (#83)

Forced Forwarding Activation/Deactivation (#72/#73)

Initiate Silent Monitoring (#82)

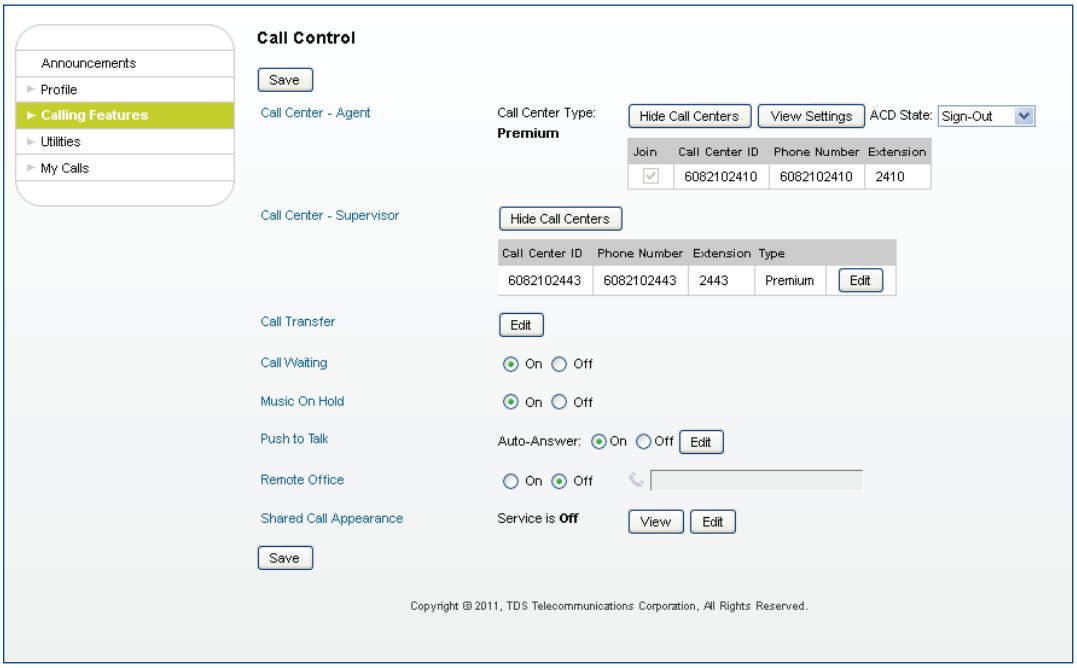
Make Outgoing Call as Call Center (#80)

Make Personal Outgoing Call (#81)

Monitoring Next Call (#84)

Night Service Activation/Deactivation of Manual Override (#70/#71)

Supervisor Web Portal Settings



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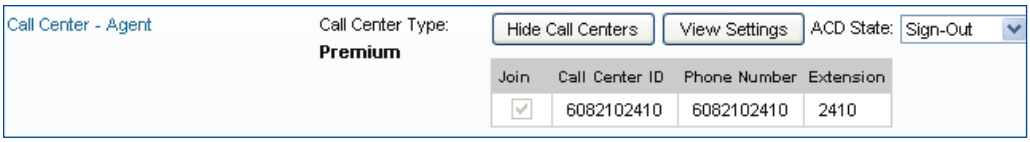
Call Center Administrator Guide

JOINING A CALL CENTER AND CHANGING CALL CENTER STATE

As a supervisor, in addition to having the ability to monitor agent and queue status, you can also join a queue to take calls.

To join a call center and change your status:

1. At the User level, select **Calling Features – Call Control**
2. Click the **View Call Centers** button to the right of **Call Center – Agent**. The button will then change to **Hide Call Centers**.

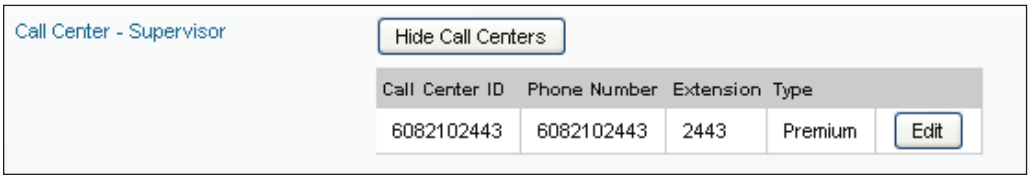


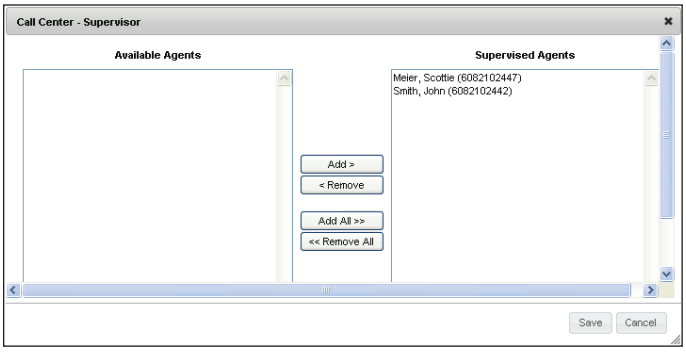
3. Click each box under the header titled **Join** to join the Call Center(s) and then select the ACD state and unavailable code from the drop-down.
4. Click **Save**.

ADD/REMOVE SUPERVISED AGENTS

To add or remove supervised agents:

1. At the User level, select **Calling Features – Call Control**.
2. Click the **View Call Centers** button to the right of **Call Center – Supervisor**. The button will then change to **Hide Call Centers**.





3. Click on the **Edit** button to the right of the Call Center queue you wish to edit.
4. Click on the agent(s) you, as the supervisor, either want to add or remove.
5. Click **Save**.

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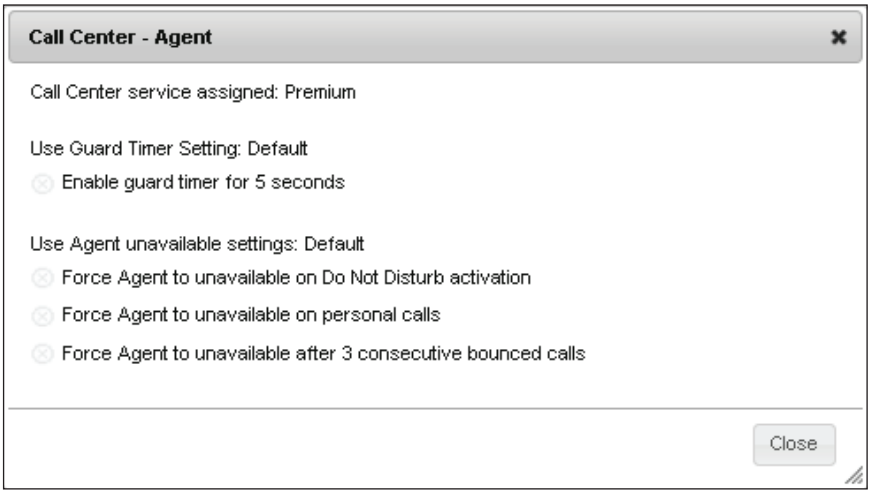
NOTE: Any changes made to your Call Center "state" via the web portal will be reflected (real-time) on both your Polycom telephone and your desktop client (if used).

CHANGING AGENT SETTINGS

To change Guard Timer or Unavailable Settings:

1. Click the **Edit** button to the right of **Call Center – Agent**. The following screen will then pop up:



2. Check or uncheck the Agent Settings to make them active.
3. Click **Save**.

For more information on configuring Guard Timer and Unavailable Settings, please see the **Agent Default Settings** section.

FEATURE ACCESS CODES

There are a number of Feature Access Codes that can be entered in to your phone that directly apply to Call Center functionality. They are as follows:

Escalate Call to Supervisor (#83)

Forced Forwarding Activation/Deactivation (#72/#73)

Initiate Silent Monitoring (#82)

Make Outgoing Call as Call Center (#80)

Make Personal Outgoing Call (#81)

Monitoring Next Call (#84)

Night Service Activation/Deactivation of Manual Override (#70/#71)

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Use Cases

Longest Wait Time & Priority Order

USE CASE 1 – PRIORITY ROUTING – PRECEDENCE

Two agents are staffing two queues of a group/enterprise:

- Technical support
- Customer service

The customer service is configured with the highest precedence and both queues have a single call waiting to be handled by an agent. The call in the technical support queue has been waiting the longest.

The first agent frees up and becomes available to take a new call. Because the customer service queue has the highest precedence, the call from that queue is delivered to the agent.

The second agent frees up and becomes available to take a new call. The customer service queue is empty, so the call from the technical support queue is delivered to the agent.

USE CASE 2 – PRIORITY ROUTING – LONGEST WAITING TIME

Two agents are staffing two queues of a group/enterprise:

- Technical support
- Customer service

Both queues have a single call waiting to be handled by an agent and the call in the technical support queue has been waiting the longest.

The first agent frees up and becomes available to take a new call. Because the call from the technical support queue has been waiting the longest, the call from that queue is delivered to the agent.

The second agent frees up and becomes available to take a new call. The technical support queue is empty and the call from the customer service queue is delivered to the agent.

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USE CASE 3 – PRIORITY ROUTING – BOUNCED CALLS

Two agents are staffing two queues of a group/enterprise:

- Technical support
- Customer service

Both queues have a single call waiting to be handled by an agent and the call in the technical support queue has been waiting the longest. However, the call in the customer service queue was offered once to an agent and then bounced back to the queue.

The first agent frees up and becomes available to take a new call. Because the call from the customer service queue was offered to an agent and bounced already, the call from that queue is delivered to the agent.

NOTE: Tags shown in the web portal are based on the phone model being modified. With the IP650, all tags associated to a line key will appear with 34 options. Lines 7-34 are only applicable if the phone is equipped with an expansion module.

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Item	Tag	Description	Default	Options	Supported Devices
1	DIRECTORY_ CONTACT_ NAME_ON_ CALLERID	This allows for calls made to or received from contacts in your directory to appear as entered. For example, if Jon from ABC Company is entered as a contact in your phone directory, the Caller ID will Display exactly as it was entered in the directory versus how it is set-up with the phone company for Caller ID.	0 (off)	0 = Off 1 = On	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
2	CALL_ FORWARD_ SOFT_KEY	If enabled, the "Forward" soft key will be displayed and allows the user to update Call Forward Always, Call Forward No Answer, and Call Forward Busy, directly from the phone. Updates made via the phone will also be updated in the toolbar and web portal	0 (off)	0 = Off 1 = On	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450
3	TEXT_LABEL_ FOR_ LINEKEY_<x> (x= 1-34)	This allows for display labels to be customized for shared call appearances or secondary numbers to display a name versus a number. For example, if 608-555-1213 is the number displayed on a phone, this feature will allow a name to be displayed instead. Note: This feature is applicable to each individual line key that appears on a phone up to a maximum of 34 lines with phones that have an expansion module	<null>	<null> = Line Port appears (e.g., 6085551212 or if SCA, 6085551212_ SCA_1) <text> = <text value> (e.g., "555-1212", "Jane Doe", "TDS Telecom")	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550
4	DATE_TIME_ IN_24_HOUR_ FORMAT	Display time in 24-hour "military time" or choose standard AM / PM format.	0 (12 hr)	0 = 12 hour clock i.e. AM/PM 1 = 24 hour clock i.e. 15:30	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X

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Item	Tag	Description	Default	Options	Supported Devices
5	CALL_WAITING_TONE	Specifies the tone heard on an incoming call when another call is active (i.e., call waiting).	beep	beep = brief "beep" ring = normal ring tone silent = no tone or ringing	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
6	HANDSFREE_SPEAKERPHONE_ENABLED	Allows the speakerphone function to be disabled. When the phone is disabled: • The phone will display the message "Hands free mode disabled" when a user depresses the speakerphone key • Click-to-dial calls will revert to the handset or headset	1 (enabled)	0 = Disable 1 = Enable	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
7	HOLD_RECALL_ENABLED	"Hold Recall" provides periodic notification to the user that call(s) have been on hold for an extended period of time.	0 (off)	0 = Off 1 = On	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
	HOLD_RECALL_INITIAL_TIMER	Time (in seconds) to wait before an initial reminder is provided for a call on hold.	90 (secs)	<seconds>	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
	HOLD_RECALL_SUBSEQUENT_TIMER	Time (in seconds) to wait after the initial timer that subsequent reminders are provided for a call on hold.	60 (secs)	<seconds>	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X

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Item	Tag	Description	Default	Options	Supported Devices
8	CALL_ CENTER_ SOFT_KEYS	For Call Center agents, this option adds soft keys to phone enabling agent to Sign In/Out, and change state (Available / Unavailable).	0 (no soft keys)	0 = No soft keys 1 = CC soft keys	**VVX Series** 600, 50X, 41X, 310 **SoundPoint** 650, 560/550, 450, 33X
	CALL_ CENTER_ AGENT_LINE_ KEY	The key used to support the Call Center agent sign-in function (special icons used), interworks with Call Center soft keys.	1 (key)	1 – 34 <line key>	**VVX Series** 600, 50X, 41X, 310 **SoundPoint** 650, 560/550, 450, 33X
	CALL_ CENTER_ AGENT_SIGN_ IN_ STATE	The state of the Call Center User when signing in to the Call Center queue.	1 (available)	0 = Unavailable 1 = Available	**VVX Series** 600, 50X, 41X, 310 **SoundPoint** 650, 560/550, 450, 33X
9	MWI_ ENABLED_ FOR_LINE_KEY_ <x> (x= 1-34)	The Message Waiting Indicators, both the red LED light at the top of the phone and the envelope icon next to the line key may be disabled on a per line key basis. Note: If enabled on a single line key, the MESSAGES key will go directly to Voice Messaging. If enabled for 2+ line keys, the MESSAGES key will present a "Line Select" menu, prompting the user to select the line key they desire to retrieve messages.	Registration (enabled)	Registration = On <null> or disabled = Off	**VVX Series** 600, 50X, 41X, 310 **SoundPoint** 650, 560/550, 450, 33X

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Item	Tag	Description	Default	Options	Supported Devices
10	MISSED_ CALLS_LIST_ AND_ COUNTER_ ENABLED	When enabled, missed calls will increment the "Missed Calls" counter on the display and the missed calls will be logged in the "Missed Calls List".	1 (Line Key 1) 0 (Line Keys 2 -34)	0 = Off (does not log) 1 = On	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
	HOLD_ RECALL_ INITIAL_TIMER	Time (in seconds) to wait before an initial reminder is provided for a call on hold.	90 (secs)	<seconds>	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
	HOLD_ RECALL_ SUBSEQUENT_ TIMER	Time (in seconds) to wait after the initial timer that subsequent reminders are provided for a call on hold.	60 (secs)	<seconds>	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
11	HOTLINE_ ENABLED_ FOR_LINE_ KEY_<x>	When enabled, a call will be automatically placed to the "Hotline Number", which can be set by completing Tag X.	0 (disabled)	0 = Disabled 1 = Enabled	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
	HOTLINE_ NUMBER_ DIALED_FOR_ LINE_ KEY_<x>	You first must enable this feature to set a predefined number to be automatically dialed. See Tag X to enable this function.	<null>	<DN> (any valid internal or external telephone number that can be dialed directly from the station)	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X
12	CALLER_ID_ NUMBER_ BEFORE_NAME	When activated, the phone will display the Caller ID number before the Caller ID Name.	0 (name first)	0 = Off (name first) 1 = On (number first)	VVX Series 600, 50X, 41X, 310 SoundPoint 650, 560/550, 450, 33X

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Additional Support

- Contact Technical Support at 1-888-850-5915 or
- Visit support.tdsmanagedip.com/hosted for additional resources

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