managedIP HOSTED

Call Center Agent Plus Guide

Table of Contents

179471/5-18/10541

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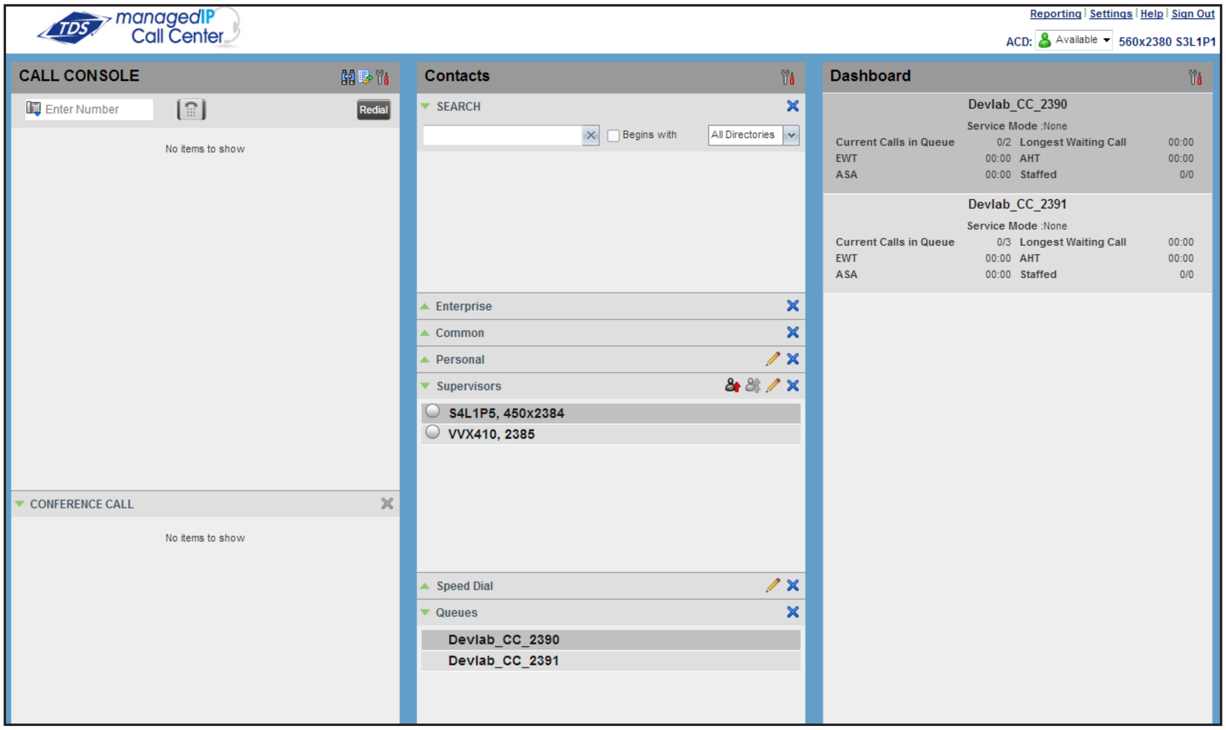
Logging in

1. Open your web brower and go to clients.tdsmanagedip.com/callcenter.
2. Enter your TDS managedIP phone number and password.
3. Click **Sign-In**.

Agent Tasks



Call Center Interface

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

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

The main area of the *Call Console* displays your current calls and allows you to take actions on them. In addition, the *Call Console* contains the following panels:

– *Dialer* – This is where you dial ad hoc numbers

– *Conference Call* – This is where you manage conference calls

179471/5-18/10541

- **Contacts Pane** – This is located on the right-hand side of the Call Center main page. It allows you to make calls to contacts and manage directories. It contains the following areas:
  - *Contact Directories* panels – Access and manage your contacts
  - *Search panel* – Search for contacts
  - *Directories panel* – Consolidate contacts from several directories
- **Dashboard Pane** – This is located on the right-hand side of the Call Center main page. It allows you to monitor selected call centers to which you are assigned as an agent.
- **Links to other windows:**
  - *Reporting* – This provides access to Call Center Reporting
  - *Settings* – This provides access to client configuration pages
  - *Help* – When clicked, this opens the BroadWorks Hosted Call Center – Agent/Supervisor User Guide
  - *Sign-Out* – When clicked, this signs you out of the call center and allows you to save your workspace

Agent Automatic Call Distribution (ACD) States

Your ACD state can be one of the following:

- **Available** – You are available to receive calls
- **Unavailable** – You are not available to receive calls
- **Wrap-Up** – You are wrapping up a call and you are temporarily unavailable to receive calls

Configure Your Post Sign-In ACD State

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

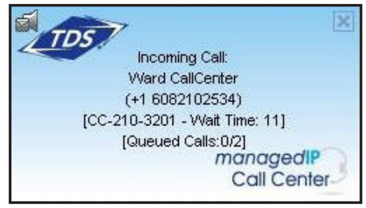
Change Your ACD State and Set Unavailable Code

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

179471/5-18/10541

View Incoming Call Details

If the Notification feature is enabled, a notification window appears on top of the system tray when you receive a call, displaying the name and number of the caller.
For calls from queues, it displays:



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

Open URL

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

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

Save vCard

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

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

Dial Ad Hoc Number

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

Call Contact

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

Redial Number

Up to 10 previously dialed numbers are available.

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

Dial from Call History

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

179471/5-18/10541

Dial from Search

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

Answer Call

Calls can be answered automatically or manually.

To answer calls automatically:
In the *Call Console*, click **Auto Answer** .

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

To answer a call manually:
Move the mouse over an incoming call and click **ANS**.

Blind Transfer Call

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

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

Transfer Call with Consultation

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

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

Transfer to Queue

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

Hold Call

In the *Call Console*, click **HOLD** for an active call.

Resume Call

In the *Call Console*, click **ANS** for a held call.

End Call

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

Generate Call Trace

To generate a call trace for a current call:

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

To generate a call trace for the last released call:

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

Tag ACD Call with Disposition Codes

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

To assign disposition codes to a current call:

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

To assign disposition codes in Wrap-Up:

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

Start Three-Way Conference

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

Add Participant to Conference

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

Hold or Resume Conference

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

Leave Conference

You can only leave a Three-Way conference.

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

Drop Call from Conference

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

Hold Conference Participant

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

Resume Conference Participant

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

End Conference

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

Monitor Supervisor Phone State

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

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

Phone States

The phone state of a supervisor can be Idle, Busy,

Ringing, Do Not Disturb, Private,

Forwarding, or Unknown.

Make Emergency Call to Supervisor

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

Blind Escalate Call to Supervisor:

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

Escalate Call with Consultation

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

Escalate Call with Conference or Hand Over

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

Escalate Call with Mid-Conference Hold

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

179471/5-18/10541

Sent Email to Contact

1. Expand the *Group/Enterprise or Favorites* tab, click a contact with email, and then click **EMAIL**.
2. In the message window that appears, enter the required information and then click **Send**.

Display Call History

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

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

Delete Call History

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

Show or Hide Contacts

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

Search for Contacts

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

NOTE: The search is not case-sensitive.

179471/5-18/10541

Manage Speed Dial and Personal Directories

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

NOTE: You cannot modify a Personal entry.

Reporting

Call Center provides Enhanced reporting.

The following Enhanced reports are available to you:

- Agent Activity Report
- Agent Call Detail Report
- Agent Call Report
- Agent Duration Report
- Agent Sign In Sign Out Report

For information on these reports, consult the Call Center Reporting Guide found at http://support.tdsmanagedip.com/Applications.html.

NOTE: Agents can only request reports about themselves.

Run Enhanced Report

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

179471/5-18/10541

Schedule Enhanced Report

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

Manage Scheduled Reports

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

Keyboard Shortcuts

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

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

179471/5-18/10541

Additional Support

- Contact the managedIP Administrator at your company or
- Visit support.tdsmanagedip.com/hosted for additional resources

179471/5-18/10541