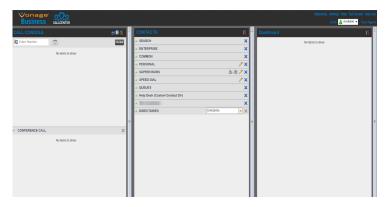


Agent Tasks



Call Center Interface

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

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

Main *Call Console* pane is used to view and manage current calls. *Call Console* contains the following panels:

- Dialer To dial ad hoc numbers.
- Conference Call Manage conference calls.
- Contacts pane Located in the middle pane of the Call Center main page. Used to place calls to contacts and manage contact directories. It contains the following areas:
 - Contact Directories panels Access and manage contacts.
 - Search panel Search for contacts.
 - Directories panel Consolidates contacts from several directories.
- Dashboard Pane Located on the right-hand side of the Call Center main page. Used to monitor selected call centers an agent is assigned.
- Links to other windows:
 - Reporting Provides access to Call Center Reporting.
 - Settings Access client configuration pages.
 - Help Opens the BroadWorks Hosted Thin Call Center
 Agent/Supervisor User Guide.
 - Sign-Out Log out of current session, save your workspace.

Agent Automatic Call Distribution (ACD) States

Possible ACD States:



Available - Available to receive calls.



Unavailable - Not available to receive calls.

Wrap-Up – Wrapping up a call, temporarily unavailable to receive calls.

Configuring Post Sign-In ACD State

- 1. Click Settings link.
- 2. Click Application tab.
- 3. Choose Post Sign-In ACD State and Post Call ACD State.
- Unavailable reason code may be needed when Post Call ACD State is set to "Unavailable".
- 5. Check Set Wrap-Up timer box to set amount of time Post Call ACD State will change from Unavailable to Available.

Change ACD State and Set Unavailable Code

- 1. Choose desired state from ACD drop down (upper right corner).
- 2. Choose Unavailable Code from the list (if configured)



Modify Outgoing Call Identity





Incoming Call: Customer Center (+1 2025551013)

2. Select phone number to be displayed from drop down list.

View Incoming Call Details

Notification window appears on top of system tray for inbound call.

Queued Call(s) Display:

- Call center name/number
- Call center or DNIS name
- Wait time for call
- Number of queued calls
- Diversion information, if applicable

Open URL

Open a Uniform Resource Locator (URL) page in a browser to see additional details for an incoming or current call.

Click **Web Pop URL** in the *Call Notification* pop-up window, for an inbound call.

Save vCard

Click **Add vCard** in the *Call Notification* pop-up window. Outlook must be running.

Dial Ad Hoc Number

Click **Dial** in the *Dialer*, enter the number to call

Call Contact

- To call a contact's default number from the Contacts pane, click contact name followed by CALL
- To dial any other number(s) for a contact, click the right Call button and select the number from the list.

Redial Number

Click the **Redial** button and then select a number (up to 10) from the list in the *Dialer*.

Call Center Agent Quick Start



Dial from Call History

- 1. Click Call History from Call Console.
- 2. Select Calls, Received Calls, or Placed Calls. Missed
- 3. Click call log to expand
- 4. Click Call for log details.

Dial from Search

- 1. Perform search using Search feature.
- 2. Click the target contact.
- 3. Click Call.

Answer Call

Calls can be answered automatically or manually.



- To answer calls automatically: Click Auto Answer
- To answer a call manually: Move mouse over an incoming call, click ANS.

IMPORTANT: Auto Answer cannot be enabled in the client when it is enabled on the server. Device must be Advanced Call Control (ACC) compliant.

Blind Transfer Call

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

- 1. Transfer to an ad hoc number: enter number in the Dialer and then click Transfer.
- 2. Transfer to contact (primary number): Click contact from directory and then click TXR.
- 3. Transfer to contact (not primary number): Click the right Transfer button and select number from list.

Transfer Call with Consultation

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

- 1. Dial the number or contact to whom call will be transferred.
- 2. When the call is answered, speak to the party.
- 3. From the Call Console, select the original call.
- 4. Move the mouse over new call, click TXR.

Transfer to Queue

- 1. Select call to transfer from the Call Console.
- 2. Expand Queues panel in Contacts pane.
- 3. Click TXR for desired queue.

Hold Call

Click **HOLD** for active call in Call Console.

* NOTE: Function is not available from a remote office.

Resume Call

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

* NOTE: Function is not available from a remote office.

End Call

Hover over a call and click



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. Click the call.
- 2. Select a disposition code from list.

To assign disposition codes in Wrap-Up:



2. Select code from drop-down.

Start Three-Way Conference

- 1. Select one of the two calls to conference.
- 2. Hover mouse over second (non-selected) call
- Click CONF.
- 4. Calls move to Conference Call panel.

Add Participant to Conference

- 1. Hover mouse over call
- 2. Click CONF.

Hold or Resume Conference

- To Hold: Click **HOLD** in the *Conference Call* panel header.
- To Resume: Click ANS.

Leave Conference

Click **LEAVE** in the *Conference Call* panel.

- The other parties remain connected.
- Calls are removed from the Conference Call panel.

Drop Call from Conference

- 1. Select call
- 2. Click

Hold Conference Participant

- 1. Move mouse over target call
- 2. Click HOLD

Resume Conference Participant

- 1. Move the mouse over target call
- 2. Click ANS.

End Conference

Click END to release all calls.

Monitor Supervisor Phone State

Confirm supervisor availability prior to escalation by monitoring phone state for selected supervisor(s).

1. Click Edit from Supervisors panel



- 2. Select supervisor(s) to monitor.
- 3. Click Save.

Call Center Agent Quick Start

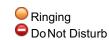


Phone States

Possible contact phone states:









Make Emergency Call to Supervisor

- System Selection: Click Emergency (active call)
- Manual Selection: Click available supervisor, Click EMER

Blind Escalate Call to Supervisor:

- 1. While on a call, click **Escalate** in the *Supervisors* panel (system selects supervisor), or click an available supervisor and then click **ESC** for that supervisor.
- 2. In the Call Console, select original call.
- 3. Move mouse over the call to the supervisor
- 4. Click TXR.

Escalate Call with Consultation

- 1. While on a call, click **Escalate** in the *Supervisors* panel (system selects supervisor), or click an available supervisor and then click **ESC** for that supervisor.
- 2. Consult supervisor.
- 3. In Call Console, select original call.
- 4. Move mouse over the new call
- 5. Click TXR.

Escalate Call with Conference or Hand Over

Customer and supervisor remain on call after agent hangs up.

- 1. While on a call, click **Escalate** in the *Supervisors* panel (system selects supervisor), or click an available supervisor and then click **ESC** for that supervisor.
- 2. Consult supervisor.
- 3. In Call Console, select original call.
- 4. Move the mouse over the call
- 5. Click CONF. (Call appears in Call Console panel).
- 6. Click **LEAVE** in the *Conference Call* panel. The customer and the supervisor continue their conversation.

Escalate Call with Mid-Conference Hold

Call remains in the *Conference Call* panel while the other parties continue to converse.

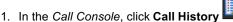
- While on a call, click Escalate in the Supervisors panel (system selects supervisor), or click an available supervisor and then click ESC for that supervisor.
- Consult supervisor.
- 3. In Call Console, select original call.
- 4. Move mouse over the call
- Click CONF.
- 6. Click HOLD in the Conference Call panel

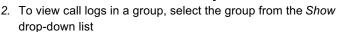
Sent E-mail to Contact

- 1. Expand the Group/Enterprise or Favorites tab
- 2. Click a contact with e-mail
- 3. Click EMAIL.
- 4. Enter required information.
- 5. Click Send

Display Call History

Call History displays placed, received, and missed calls.



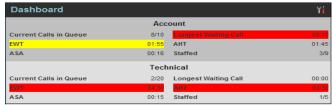


Delete Call History

- 1. In the Call Console, click Call History
- 2. Select call log in Call History dialog box
- 3. Click **Delete** for call.
- 4. OPTIONAL: Click Delete All to remove all call logs.

Monitor Call Centers

- 1. In the *Dashboard* pane, click **Options**
- 2. Select the Select Queues option.
- 3. Check the call centers you want to monitor and click Save.
- 4. Click **Options** again
- 5. Click Select Visible Fields.
- Check Select All to display all performance indicators.
 NOTE: Choose performance indicators to be displayed by checking or unchecking corresponding check boxes.
- 7. Click Save.



Administrators set yellow/red (higher severity) thresholds for some measurements. Color will be displayed when threshold is met.

Call Center Agent Quick Start



Show or Hide Contacts

- 1. Click **Options** from top of *Contacts* pane
- 2. Select View
- 3. Select Directories.
- 4. Check directories to view, deselect directories to hide.
- To show or hide directory contents, click Expand or Collaps in directory panel.
- 6. Select the directory from drop-down list to display in *Directories* panel (*Show all to* see all directories).
- To display a directory below Call Console, select Show All in the Directories panel, click the Pullout Directory button for target directory.

Search for Contacts

- 1. Choose directory from drop-down in *Search* panel.
- 2. Check the Begins with box to restrict search.
- 3. Enter text to searched, press ENTER. (partial information can be used)
 - To clear results, click **Reset**

Manage Speed Dial and Personal Directories

- 1. Click **Edit** in the Speed Dial or Personal panel.
- 2. To add an entry, click Add.
 - Speed Dial entry: Select dial code, enter description.
 - Personal entry: enter name/number.
- 3. To delete an entry, select entry, click **Delete**.
- To modify Speed Dial entry, double-click the entry, modify.
 NOTE: Personal entries cannot be modified.

Keyboard Shortcuts

Key	Equivalent Mouse Action
ESC	Click the Close button in a dialog box.
ESC	Cancel the changes.
I	Click the <i>Dialer</i> 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.
19	Select a call in the Call Console.
SPACEBAR	Click Answer on the selected incoming call in the <i>Call Console</i> .
<period></period>	Click End on the selected call in the <i>Call Console</i> .
ENTER	Click Dial .
ENTER	Click Search.
+	Click Transfer in the <i>Dialer</i> .
SHIFT+19	Select a ringing call and click Answer .
SHIFT+19	Select an active call and click Hold .
SHIFT+19	Select a held call and click Retrieve .
Sors	Click the Settings link.
B or b	Click the Back to Application link.
Rorr	Click the Call History button.
H or h	Click the Help link.
D or d	Click the Dashboard link (Supervisor)
SHIFT+L or SHIFT+I	Click the Sign Out link.
SHIFT+A	Select Available (Agent).
SHIFT+U	Select Unavailable (Agent).
SHIFT+W	Select Wrap-Up (Agent).