Broadcore Call Center

Quick Reference Guide

v14.6 MB5, Build 30 Rev 2

AGENT TASKS

Log in/Log out

Once setup, the following softkeys and icons are displayed on your Polycom Telephone:

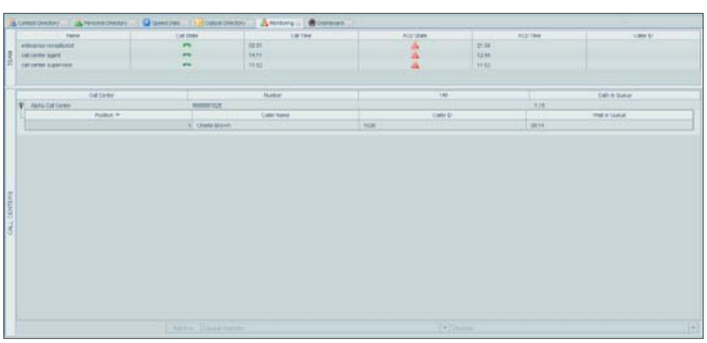
- **ASignIn** –As in Agent Sign in. That's you. Just click this button to be available to receive calls from all the Call Center for which you are an agent. When this is enabled the icon next to your extension will show a head with the hair solid, filled in. (the face remains hollow.)
- **ASignOut** – As in Agent Sign Out. Click this button to be signed out. This is the easiest way to log out to be sure your phone does not get calls from the call centers while you are away from your desk. When this is enabled the icon will show a head with the hair hollow, (matching the face.)
- **Unavailable** –This is a second option for logging out. This status should only be used for periods of less than five minutes. For instance if you need to finish work from an earlier call. When this is enabled the icon will blink between an X and the head.
- **Available** – If you have used the "Unavailable" use this button to start getting calls again.
  NOTE: Softkeys are context sensitive and appear at the bottom of the display. You may need to press More to see the appropriate softkey.

SUPERVISOR TASKS

Client Interface Orientation

The following elements are available from the Call Center interface:

- **Menu** bar – Located at the top, allows you to set up your preferences for using the Call Center.
- **Call Selector** list – Located below the Menu bar, lists current calls.
- **ACD/Control** panel – Located below the *Call Selector* box, allows you to:
  - Modify your availability state (Available, Unavailable, Wrap-Up buttons)
  - Manage calls (Answer, Transfer, Conference, End, Escalate buttons)
- **Content** panel – Is where directories appear.



Display Monitoring Center Activity

To display the status and statistical information about the agents and queues you manage, on the Menu bar, click *View* and then select *Monitoring* and *Dashboard*.

To display the status information, in the *Content* panel, click the *Monitoring* tab to view the current status, or click *Dashboard* to view statistics.

Monitor Agents and Queues

You monitor agents and queues using the *Monitoring* tab.
The *Team* panel shows real-time status of the agents you supervise.

The call state of an agent can be available to receive a call, on a call/busy, ringing, do not disturb, private, forwarding always, and not available.

The ACD status of an agent can be signing-in, available, unavailable, wrap-up, and signed-out.

The *Call Centers* panel shows the Call Centers you are managing. You can expand the Call Centers you manage by clicking the plus icon. When expanded, the first 25 calls in the queue appear.

Supervisor Barge-In

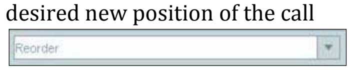
1. In the *Team* area of the Monitoring tab, select an agent with the status "Off Hook" .
2. Click **Barge In**.
   A conference call is established.
3. To leave the conference, click **Conference** and select *Leave.*
   Alternatively, to drop a party from the conference, select the party's name from the *Call Selector* list and click **End**.

Agent Call Pick Up

1. In the *Team* area of the Monitoring tab, select an agent with the status "Ringing" .
2. Click **Call Pick-Up**.
   You can now speak to the calling party.

Position Call in Queue

1. In the *Monitoring* tab, select a queue.
2. From the *Queue Detail* sub-table, select the call to reposition.
3. In the *Reorder* list located at the bottom-right of the tab, click the desired new position of the call



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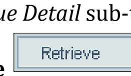
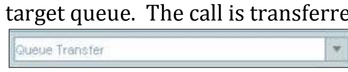
Retrieve Call from Queue

1. In the *Monitoring* tab, select a queue.
2. From the *Queue Detail* sub-table, select the call to answer.
3. Click **Retrieve** , at the bottom of the tab.
4. Answer the retrieved call.

Transfer Calls between Queues

1. In the *Monitoring* tab, select a queue.
2. From the *Queue Detail* sub-table, select the call to transfer.
3. From the *Queue Transfer* list, at the bottom of the tab, select the target queue. The call is transferred to the back of the queue



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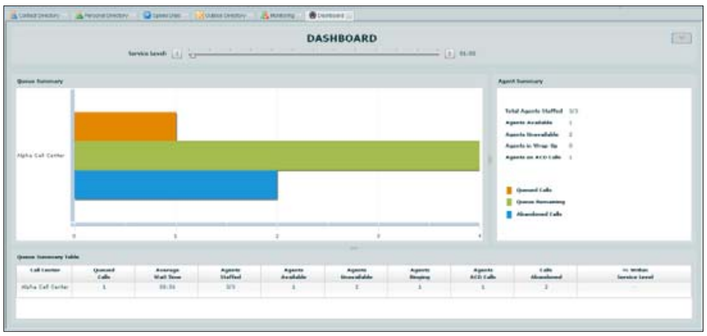
Retrieve Call from Queue to Number

1. In the *Monitoring* tab, select a queue.
2. From the *Queue Detail* sub-table, select the call to transfer.
3. Click **Retrieve**.
4. Dial or select the destination number.
5. Click **Transfer**.

View Agents and Queues Statistics

You can view real-time call and agent statistics, for the Call Centers and agents assigned to you, using the *Dashboard* tab.

- The *Queue Summary* shows key performance indicators for each Call Center you manage.
- The *Agent Summary* shows key performance indicators for the supervised team of agents.
- The *Queue Summary Table* shows queue statistics on a per-Call Center basis in a tabular form.



Reports

The following reports are available to you:

- Agent Activity (historical or real-time) – Provides metrics about agents call handling activities for a Call Center.
- Agent Utilization (historical) – Provides metrics related to agents call performance for a Call Center – Displays metrics related to the performance of a Call Center ACD.
- Queue Performance Analysis(historical or real time) – Displays metrics related to the performance of a Call Center ACD
- Service Level (historical) – Displays metrics related to the speed of answering ACD calls

Display Report

1. From the Menu bar, select *View* and then *Reports*.
2. Select the report type you want.
3. In the dialog box that appears, enter the required information.
4. Click **Display**.
   The report appears in the *Content* panel.

Refresh Report

Only real-time reports can be refreshed to show the most recent data.

To refresh a report, click **Refresh**.

Print or Export Report

You can print a report or export it to a file that can be opened in Excel or in a text editor.

To print a report, at the bottom of the report, click **Print**.

To export a report to a file:

1. At the bottom of the report, click **Export**.
2. Specify the location where you want to save the file.

Login/Logout

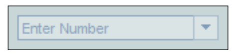
Some setting changes or if the system times out you can simply to a software reboot. Click File>>Sign Out. Then click Sign In.

Dial from Directory

1. In the *Content* panel, select the target directory.
2. Click the phone number you want to call.

Dial Ad Hoc Number

1. In the *Dial Number* box, type the number to call.

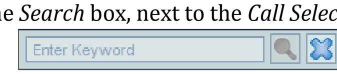


2. Press **Enter**.

Dial from Search

In the *Content* panel, select the target directory.

In the *Search* box, next to the *Call Selector* box, type your search criteria



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Press **Enter**.

Click the phone number you want to dial.

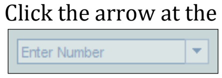
Dial from Call History

1. From the *Menu* bar, select *Tools – Call History*.
2. Select the call history you want (*Dialed Calls*, *Received Calls*, or *Missed Calls*).
3. Click the phone number you want to call.

Redial Number

Up to 10 previously dialed numbers are available.

1. Click the arrow at the right of the *Dial Number* box



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2. From the *Dial Number* list, select the number you want to call.
3. Press **Enter**.

Answer Call

Calls can be answered automatically or manually.

Blind Transfer Call

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

1. From the *Call Selector* list, select the call to transfer.
2. Dial or select the number to call. The first call is put on hold.
3. Before the second call is answered, click **Transfer** and select the phone number from the list.

Transfer Call with Consultation

Calls can be transferred with consultation while active, held, or ringing (in) on your phone.

1. From the *Call Selector* list, select the call to transfer.
2. Dial or select the destination number. The first call is put on hold.
3. When the second call is answered, speak to the party.
4. Click **Transfer** and select the phone number from the list.

Transfer Call to Queue

While on a call, click **Transfer** and select the destination queue from the list.

Hold Call

This function is not available from a remote office.

1. From the *Call Selector* list, select an active call.
2. Click **Hold**.

Unhold Call

This function is not available from a remote office.

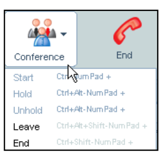
1. From the *Call Selector* list, select a held call.
2. Click **Unhold**.

End Call

1. From the *Call Selector* list, select the call to end.
2. Click **End.**

Start Conference

1. While on a call, dial a number or select a contact.
2. Click **Conference** and select *Start* from the list.



Hold Conference

To hold a conference, click **Conference** and select *Hold*. The other parties can continue their conversation.

Unhold Conference

To unhold a held conference, click **Conference** and select *Unhold*.

Leave Conference

To leave a conference, click **Conference** and select *Leave*.

Drop Call from Conference

To drop a selected call from a conference:

1. In the *Call Selector* list, select the call you want to drop.
2. Click **End**.

End Conference

To end a conference, click **Conference** and select *End* from the list.

Open URL

You can open a 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.

While on a call, click the **Web Pop URL** button in the call pop-up notification window.

Save vCard

When Outlook is running, you can save the active caller's phone number and personal information as a vCard in Outlook.
While a call is active, click the **Add vCard** button in the call pop-up notification window.

Display Call History

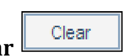
From the *Menu* bar, select *Tools – Call History.*

Order Call History

To order the call history according to a column:

1. In the *Tools – Call History* dialog box, click the column header. The history log is sorted in descending order.
2. Click the column header again to change the order to ascending.

Delete Call History

In the *Call History* tab, click **Clear**  and then confirm your action. This clears all call logs in Call History.

Show or Hide Directory Tab

To make a directory tab visible in the *Content* panel:

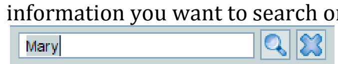
1. From the *Menu* bar, select *View* and then *Directories*.
2. In the Directories menu, check the directories you want to show in the *Content* panel.

Display Directory

In the *Content* panel, click the tab of the directory you want to display.

Search Directory

To search for a contact based on specific criteria:

1. In the *Search* box at the bottom of the Content panel, type the information you want to search on.
   

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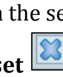
2. Click **Search** .
   The directory displays the contacts that match the search criteria.
3. To return to the unfiltered directory, click **Reset** .

Keyboard Shortcuts

General and Menu Bar Control Keys	
ESCAPE	Exit from the active window.
Ctrl + A	Toggle between *Available* and *Unavailable* states.
Alt + W	Change your status to *Wrap-Up*
<NumPad 0…9)	Dial digits of a phone number
Menu Bar Control Keys	
Alt + O	Display Tools – Options.
Alt + R	Display Tools – Call History.
Alt + H	Open *BroadWorks Call Center User Guide*.
Alt + L	Toggle between login and logout.
Alt + F4	Exit the Call Center.
F11	Toggle between full screen and compact mode for the Call Center window.
Directories Control Keys	
Alt + 1	Click the *Contact Directory* tab.
Alt + 2	Click on *Personal Directory* tab.
Alt + 3	Click on *Speed Dials Directory* tab.
Alt + 5	Click on *LDAP Directory* tab.
Alt + 5	Click on *Outlook Directory* tab.
ALT-M	Click on *Monitoring* tab.
ALT-D	Click on *Dashboard* tab.
Control Keys	
ENTER	Click **Dial**.
<NumPad+>	Click **Transfer**.
<NumPad.>	Click **End**.
F1…F10	Click **Answer** after selecting a call in a queue, or double-click an active call.
F1…F10	Click **Hold** after selecting a call in the queue, or double-click an active call in the *Queue* panel.
F1…F10	Click **Unhold** after selecting a call in the queue, or double-click an active call in the *Queue* panel.
Ctrl + <Number Pad +>	Click **Conference**.
Ctrl + Alt + <Number Pad +>	Click **Conference Hold/Conference Unhold**.
Ctrl + Alt + Shift + <Number Pad +>	Click **Leave Conference**.
Ctrl + Shift + <Number Pad +>	Click **End Conference**.

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