

## Agents

Agents are employees of the company that have an identification number to login to their assigned queues to accept queued calls. In order for any person to receive queued calls, they must be first configured as an agent, and second assigned to one or more queues.

To create an Agent, click on the "Agents" menu item under "Call Center" on the menu. You will see a list of all existing agents configured in your PBX. Click the "New Agent" button to create a new agent. Fill in the following fields:

- **Agent ID:** This can be any number from 1 to 5 digits long. The Agent will use this number to log in and out of the queues.
- **Agent Name:** This is the agent's name. It will appear in the Call Center reports as entered here.

After you've created your list of agents, you can assign each agent to one or more Queues.

## Queues

- **Name** - Enter a name to identify this queue.
- **Caller ID Prefix** - This determines the settings of the Caller ID display when ringing an *agent's* phone. There are four options:
  - *Original Caller ID* - Display the caller's original Caller ID name
  - *Custom Text Only* - Enter text into the box at the right, only that text is displayed on the agent's LCD display
  - *Custom Text: Original Caller ID* - Enter text into the box at the right. That text is displayed, followed by a colon (:), followed by the caller's original Caller ID name.
  - *None* - Displays nothing on the agent's LCD display.
- **Queue Timeout** - Enter the number of minutes that a caller should remain in the queue, before their call is forwarded to another location within the PBX. If you would like callers to remain in the queue forever, enter 0.
- **After Timeout** - If you have a timeout set in the above field, this determines where the caller is forwarded to after the timeout expires.
- **Can Callers Join an Empty Queue?** - If "Yes" is selected, then a caller will be able to join the queue, even if no agents are logged into the queue. Otherwise, the queue will immediately time out, and the caller will be sent to the "After Timeout" setting.
- **Ring Strategy** - This determines the strategy of ringing agents. There are five available strategies:
  - *Ring All* - Rings all logged-in agents at the same time until one of the agents answers
  - *Least Recent* - Rings the agent who least recently answered a queued call
  - *Fewest Calls* - Rings the agent who has taken the least amount of calls than all other logged-in agents
  - *Random* - Rings agents in a random manner
  - *Round Robin* - Rings agents in a round-robin manner. (Even distribution of calls)
- **Ring Each Agent For** - When sending a call to an agent, how long should the agent's phone ring before sending the call to the next available agent?
- **If Agent Doesn't Answer** - If an agent does not answer in the time entered in the above field, should they be penalized? There are three options:
  - *No penalty* - Do not penalize the agent, just send the call to another agent. This agent will continue to receive queued calls.
  - *Automatically Pause Agent* - Set the agent's status to "Paused" or "Make Busy". The agent will not receive any more calls until they un-pause.
  - *Automatically Logoff Agent* - Log the agent out of the queue. They will no longer receive calls from this queue until they log in again.
- **Wrap-up Time** - After an agent finishes a queued call, how long should the queue wait before attempting to send the agent another call? (0 seconds is acceptable)
- **Play Periodic Announcements** - While the caller is waiting in the queue, they will hear the hold music from your PBX. You may configure an announcement to periodically interrupt the hold music and play to the waiting caller. You may enable or disable this periodic announcement with this control. The following two fields determine which announcement will play, and how often it should repeat.
- **Announcement Audio** - Similar to the way an auto attendant works in the CoreDial system, you will record the periodic announcement into a voice mailbox that will be used only for this purpose. Please select the mailbox into which you will record your periodic announcement audio. Be sure to record the audio into the "Busy" greeting of this mailbox.
- **How Often (seconds)** - How often should the periodic announcement repeat?
- **Can Caller Press 0 to Exit Queue?** - While the caller is waiting in the queue, should they have the ability to press 0 to exit the queue? If yes, then your periodic announcement should instruct the caller that they are able to do so.
- **If Caller Presses 0** - If the caller presses 0 while waiting in the queue, where should there call be forwarded to within the PBX?

**Agents Assigned to this Queue** - You must select which agents belong as members to this queue. Otherwise, the agents will not receive calls from this queue. Select agents from the left list, and then click the "Add" button to the right list. All agents listed in the right "Agents to Ring" list will receive calls from this queue. Agents can be removed from the queue by selecting their name in the right list then clicking the "Remove" button.

### *Agent Login and Pause*

Once you have a queue and agents configured, agents may login to each queue. Agents may log in to multiple queues at the same time. Each queue has its own login dial code to be dialed. The login, logout, pause and un-pause dial codes for each queue can be found at the top of the Queue edit screen once the queue has been saved.

- To Login to the queue(s): Agent dials \*01 + Agent ID
- To Logout of the queue(s): Agent dials \*00 + Agent ID
- To Pause in the queue(s): Agent dials \*02 + Reason Code + Agent ID (see Reason Codes for more info.)
- To Unpause in the queue(s): Agent dials \*03 + Agent ID

### *Reason Codes*

When an Agent needs to stop receiving calls from the queue(s), but does not want to log out of the queue(s), they can pause themselves. They will stop receiving queue calls until they un-pause, but will still be reported as logged into the queue(s). In addition, the agent can provide a "Reason Code" to indicate the reason that they are currently paused. This reason code is logged with their pause event, and reported on the Realtime Console.

There are 10 Reason Codes listed. The system will have default values for each of the Reason Codes, such as "Wrap Up Time", "Restroom", "Break" and "Lunch. The user can change any of these Reason Codes. Update the textbox next to each Reason Code, and click "Save". To reset all codes to the default values, click "Restore Defaults".

### *Tally Codes*

When an Agent receives a call from the queue(s), and needs to assign that call a specific category for billing or other purposes, the agent can provide a "Tally Code" to indicate the nature of the call. This Tally Code is logged in the Queue Call Activity Report.

There are 10 Tally Codes listed. The system will have default values for each of the Tally Codes. The Administrator can change these Tally Codes. Update the textbox next to each Tally Code, and click "Save".

### *Queue Reports*

The Call Center has 7 reports available:

- **Real-time Console** - A real-time view of all queues showing calls waiting, hold time, and agents' status.
- **Queue Performance** - A historic metrics report searchable by date, showing metrics by queue.
- **Agent Performance** - A historic metrics report searchable by date, showing metrics by agent.
- **Agent Events** - A historic metrics report searchable by date and by agent, showing agent activity by session.
- **Queue Call Activity** - A call log report showing calls by date, by queue, and by agent.
- **Answer/Abandon Report** - A historic metrics report searchable by date, by queue, or by agent, showing metrics of answered or abandoned calls.
- **Queue Summary by Number** - A historic metrics report, searchable by date, by phone number, and by queue, showing metrics of calls inbound to specified phone numbers and queues.

### *Visual Status Indicators*

The Call Center has the option to display the agent's queue status on the LCD screen of Polycom SoundPoint IP Phones (IP 450 IP550 IP560 IP650 IP670), VVX 500, and VVX 600 phones. If this option is enabled for a given phone, then the phone will display a screen showing the agent ID of the agent who is logged in at that phone, the agent's current status ("Logged In" or "Paused"), and the list of queues that the agent is currently logged into. If no agent is logged into a queue at that phone, the screen displays "No agent logged in".

To enable this feature, the phone must be configured to display the status. Go to **Extensions Tab** select the extension you which to use as an agent, under **Routing and Configuration** select **Advanced** tab and set **Show agent status on LCD display: Yes** then select **Save**. Reboot the phone after save is initiated.