

# Quick Start Guide

# X0 IP Flex, IP Flex with VPN, SIP Service Call Center

For Group Administrators

This optional service enables business groups to set up a basic Call Center using Online Feature Management. Using Call Center, you can establish technical assistance lines, customer support numbers, or order-taking centers that serve your customers.



# About Call Center

The Call Center provides a complete, business-ready application with enhanced call handling features, such as queuing, music on hold, and agent login/logout control. You may assign one or more Call Centers to different departments, and you may request an e-mail at the end of the day, displaying statistics that monitor the performance of Call Centers and track the performance of individual agents.

To use this feature, you must:

- · Purchase this optional feature when you order services, or
- Contact XO Customer Care to initiate the feature.

#### **How It Works**

A Call Center automatically processes incoming calls received by a single phone number and distributes them to the next available agent. Call Centers inherit all of the characteristics of Hunt Group service and are also provided with sophisticated call-handling features, including:

- · Uniform distribution of incoming calls to the available agents
- Queuing of the incoming calls that cannot be answered immediately
- Overflow to a given destination when the group is unable to accept calls
- No-answer policy to redirect a call to the next agent if not answered in a specific number of rings by the previous agent
- Music on hold, comfort messages, and personalized names (You can upload a custom .wav/MP3 file to be broadcast into Online Feature Management using the Browse function.)

Please note that:

- Call Center settings override individual line features
- "Barge-in" monitoring of a call is not supported
- Call center agents cannot log in to the queue as they become available; instead, the call center response has to be set up through Online Feature Management in the XO Business Center
- Note that you must order voice mail separately from the Call Center in order to use both features. You can access Call Center voice mail from the Voice Portal or from Online Feature Management in the XO Business Center. Call center customers can use voice mail to set Call Forwarding No Answer to roll to voicemail. When this occurs, if a call center is busy and the maximum number of callers in a queue is reached), the incoming call will roll automatically to voice mail.

# Accessing Call Center in Online Feature Management

| Click on a Call Center to:   |
|--|
| <ul> <li>Edit Call Center Pro</li> <li>Set Announcement</li> <li>Set Routing Policie</li> <li>Obtain Statistics</li> </ul> |
| <ul> <li>Reset passcode for<br/>Call Center</li> </ul>   |
| <ul> <li>Set personalized na<br/>for the Call Center</li> </ul>  |
|  |
|  |
|  |
|  |

Figure 1: Accessing Call Center

# **Configuring General Call Center Settings**

OFM > Call Center > General Settings

|                             |                                      | 0 |
|-----------------------------|--------------------------------------|---|
| General Settings            |                                      | • |
| Call Center Type:           | Standard                             |   |
| Call Center ID:             | 2142920000@71072539301.vm.xohost.com |   |
|                             | (Change User ID)                     |   |
| Call Center Name:           | The other CC 214                     |   |
|                             |                                      |   |
| Calling Line ID Last Name:  | Center1                              |   |
| Calling Line ID First Name: |                                      |   |
| Department:                 |                                      |   |
| Language:                   | English 🖸 🖸                          |   |
| Time Zone:                  | (GMT-05:00) (US) Central Time        |   |
| Group Policy:               | O Circular 🔞                         |   |
|                             | C Regular 🛞                          |   |
|                             | <ul> <li>Simultaneous </li> </ul>    |   |
|                             | O Uniform 🛞                          |   |
|                             |                                      |   |
| Bandwidth and QoS Sett      | ings                                 | = |
| Call Center Settings        |                                      | • |
| Agent Settings              |                                      | - |
| Can Policies                |                                      | - |
|                             |                                      | 0 |
| Save Changes Cancel         |                                      |   |

Figure 2: General Settings

A Identify call center and Calling Line ID (if you want to change this information, click **Change User ID**)

B Select Call Center Department, if you wish. (Select None in the drop down menu if you do not wish to select a department).

Confirm language and time zone.

D

Select queue scheme you want to use to route calls:

- Circular means that agents are visited in order, starting where the last hunt group ended.
- Regular means that agents are visited in order, always starting with the same agent.
- Simultaneous means that calls are presented to all idle agents simultaneously,
- Uniform means that calls are distributed uniformly to the agents, starting with the most idle agent.

If no agent is available, caller hears welcome message, then Comfort message until an agent picks up.

**Note:** See the figures on subsequent pages of this guide to view instructions for using these submenus.

Remember to Save Changes

#### Bandwidth and Quality of Service (QoS) Settings

|   | None     |  |
|---|----------|--|
| Preferred announcement/music<br>codec for external calls: | None 🔽 🛆 |  |
| Preferred announcement/music                              | None     |  |
| codec for internal calls:                                 |          |  |
| Call Center Settings                                      |          |  |
| Agent Settings  |          |  |
|   |          |  |
| Call Policies   |          |  |
|   |          |  |
| Save Changes Cancel                                       |          |  |

Use the Bandwidth and QoS settings to set preferred announcement/music codec for external and internal calls. If you choose None from the drop down menu, callers will not hear music or an announcement.

Figure 3: Bandwidth and QoS Settings

# **Call Center Settings**

| General Settings                                      |                        |
|---|------------------------|
| Bandwidth and QoS Settings                            |                        |
| Call Center Settings                                  | A                      |
| Queue Length: 5                                       | calls                  |
| Play ringing when offering call                       |                        |
| Enable video support                                  |                        |
| Allow callers to dial 9                               | to escape out of queue |
| $\square$ Reset caller statistics upon entry to queue | в                      |
| Agent Settings  |                        |
| Call Folicies   |                        |
| Save Changes Cancel                                   |                        |
| save changes Cancer                                   |                        |





Note: Remember to Save Changes

Figure 4: Call Center Settings

# **Agent Settings**

|   | enter Settings<br>Settings   |  |  |   | •              | Permit agents to join or log into Call Centhey are online  |
|---|--|--|--|---|----------------|--|
| Allov   | w agents to join Call Cer  | nter   |  |   | В              | Allow call waiting on Agents   |
| Allov   | w Call Waiting on agent  | B  |  |   | •              |  |
| 🗹 Enal  | ble calls to agents in wra   | ap-up state C  |  |   | C              | Enable calls to agents in wrap up state  |
| 🗹 Enat  | ble maximum ACD wrap   | o-up timer: 4  |  |   |                | Enable maximum Automatic Call Distrib  |
| 20  | matically set agent state  | (minutes:seconds)  |  |   |                | (ACD) timer  |
|   | omatically set agent state<br>lable  |  |  |   | ß              | (ACD) timer  |
| Autor     Unavaila  |  | e to   |  |   | E              |  |
| Autor<br>Unavaila<br>Assigned   | able   | e to   |  |   |                | (ACD) timer<br>Automatically set agent state   |
| Autor<br>Unavaila<br>Assigned   | able<br>d Agents   | e to   | Arrange 🔹 Up 🟺 Down  | _ | •              | (ACD) timer<br>Automatically set agent state<br>View a list of agents assigned to call cer   |
| Autor<br>Unavaila<br>Assigned<br>3 agents                                 | able<br>d Agents<br>s are assigned to this ca  | Il center. (Edit Agents)   | Arrange  |   | ()<br>()<br>() | (ACD) timer<br>Automatically set agent state<br>View a list of agents assigned to call cer<br>and set placement in queue. Use the Ad   |
| Autor<br>Unavaila<br>Assigned<br>3 agents                                 | Ad Agents<br>a are assigned to this ca<br>Name                                       | Il center. (Edit Agents)   |  |   | 6              | (ACD) timer<br>Automatically set agent state<br>View a list of agents assigned to call cer<br>and set placement in queue. Use the Ad<br>and Remove button to add/remove nam  |
| Autor<br>Unavaila<br>Assigned<br>3 agents<br>Order<br>1                   | Ad Agents<br>of Agents<br>s are assigned to this can<br>Name<br>Lomba, Taco          | Il center. (Edit Agents) Telephone Number (214) 291-7600   |  |   | 6              | (ACD) timer<br>Automatically set agent state<br>View a list of agents assigned to call cer<br>and set placement in queue. Use the Ad<br>and Remove button to add/remove nam<br>from the Available Users box to/from the  |
| Autor<br>Unavaila<br>Assigned<br>3 agents<br>Order<br>1<br>2              | able d Agents s are assigned to this ca Name Lomba, Taco Ford, Kenneth Canaday, Gina | Il center. ( <u>Edit Agents</u> )<br><b>Telephone Number</b><br>(214) 291-7600<br>(214) 291-7543 | <ul> <li>Move up</li> <li>Move down</li> <li>Move up</li> <li>Move down</li> </ul> |   | 6              | (ACD) timer<br>Automatically set agent state<br>View a list of agents assigned to call cer<br>and set placement in queue. Use the Ad<br>and Remove button to add/remove nam<br>from the Available Users box to/from the<br>Assigned Users box. All of the users list |
| Autor<br>Unavaila<br>Assigner<br>3 agents<br>Order<br>1<br>2<br>3<br>Call | able d Agents s are assigned to this ca Name Lomba, Taco Ford, Kenneth Canaday, Gina | Il center. ( <u>Edit Agents</u> )<br><b>Telephone Number</b><br>(214) 291-7600<br>(214) 291-7543 | <ul> <li>Move up</li> <li>Move down</li> <li>Move up</li> <li>Move down</li> </ul> |   | 6              | (ACD) timer<br>Automatically set agent state<br>View a list of agents assigned to call cer<br>and set placement in queue. Use the Ad   |

Figure 5: Agent Settings

# **Call Policies**



Figure 6: Call Policies

#### **Call Center Announcements**





|   | Yo |
|---|----|
| 2 | CO |

ou can set call center policies for the nnected line or for the forwarded call from this page.

Note: Remember to Save Changes

#### For (A) Entrance, (B) Comfort and (C) Music on Hold messages, you can select Default or Custom.

If you choose Custom, you can upload a .wav file, which must be recorded using the codec - > CCI TTu-LAW at bitrate of 8 Mono 8khz. The maximum length for a comfort message is 5 minutes. The maximum length of a hold message is 10 minutes.

| all Center               |                 |                      |                  |                |                           |               |
|--------------------------|-----------------|----------------------|------------------|----------------|---------------------------|---------------|
| A call cen<br>users or a |                 | ses incoming calls n | eceived by a sir | ngle phone num | ber, by distributing them | to a group of |
| General                  | Announcements   | Routing Policies     | Statistics       | Passcode       | Personalized Name         |               |
| Entran                   | ce Message      |                      |                  |                |                           |               |
| Comfo                    | rt Message 🛛 🖪  |                      |                  |                |                           | -             |
| Audio:                   | U               |                      |                  |                |                           |               |
| O Def                    | ault            |                      |                  |                |                           |               |
| O Cus                    | stom            |                      |                  |                |                           |               |
| File:                    |                 | Browse               |                  |                |                           |               |
| Music                    | On Hold Message |                      |                  |                |                           |               |



B For Comfort message, you can select Default or Custom, and if you choose Custom, you can upload a .wav file.

Note: Remember to Save Changes

Figure 8: Announcements – Comfort Message

| Dup of |
|--------|
| oup of |
| oup of |
|        |
|        |
|        |
|        |
|        |
|        |
|        |
|        |
|        |
|        |
|        |

Figure 9: Announcements – Music on Hold Message

**C** For Music on hold message, you can select Default or Custom. If you choose Custom, you can upload a .wav file.

# **Call Center Routing Policies**

| all Center               | omatically proces   | ses incoming calls | received by a sir | nale phone num | ber, by distributing them to |
|--------------------------|---------------------|--------------------|-------------------|----------------|------------------------------|
| users or agents          |                     | Routing Policies   | Statistics        | Passcode       | Personalized Name            |
| Distinctive              | Ringing             |                    |                   |                |                              |
| Enable dis Ring Pattern: | inctive ringing for |                    | A                 |                |                              |
| Overflow                 |                     |                    |                   |                |                              |
| Stranded Ca              | lls                 |                    |                   |                |                              |

Figure 10: Routing Policies – Distinctive Ringing

#### **Call Center Routing Policies-Overflow**

| Note: The URLs/files for audio/video will be played in the order they are listed. | A 4000             |
|---|--------------------|
| Action:   | ► Anywł            |
| <ul> <li>Perform busy treatment</li> </ul>  | ► Incom            |
| C Transfer to phone number/SIP-URI:   | ► Auto A           |
|   | ► Call P           |
| O Play ringing until caller hangs up  | ► Accou            |
|   | ► Call C           |
| Enable overflow after calls wait 30   |                    |
| seconds   | E He               |
| Play announcement before overflow processing                                      | • <u>OFM</u>       |
| Audio:  | = <u>Busi</u>      |
| O Default   | = <u>Cont</u>      |
| O URL   | O Ac               |
|   |                    |
| 1:  | Other c<br>Flex se |
| 2:  | these fe           |
| 3:  |                    |
| 4:  |                    |
| O Custom  |                    |
| File 1: Browse  |                    |
| File 2: Browse  |                    |
|   |                    |
| File 3: Browse  |                    |
| File 4: Browse  |                    |

Figure 11: Routing Policies – Overflow

| Δ | Use this menu to select and enable distinctive |
|---|--|
| U | ring tones to associate with specific call     |
|   | center calls.                                  |

Note: Remember to Save Changes



A Use this menu to select how you want calls answered when the call center number is already busy/full, and you are still receiving incoming calls.

## **Call Center Routing Policies-Stranded Calls**

| Call Center Settings  |             |
|---|-------------|
| 7 SUMMIT AVE , PLANO , Texas  | Mana        |
| all Center  | ▶ Rec       |
| A call center automatically processes incoming calls received by a single phone number, by distributing them to     the second | > Sch       |
| <ul> <li>A care concernational processes incoming care received by a single phone number, by analyzing memory<br/>users or agents.</li> </ul>   | Edit        |
| General Announcements Routing Policies Statistics Passcode Personalized Name  | ▶ Con       |
|   | > Mar       |
| Distinctive Ringing   | Dep         |
| Overflow  | ■ Auto      |
|   | h Hur       |
| Stranded Calls  | ■ Any       |
| Action:   | ► Inco      |
| C Leave in queue  | ► Auto      |
| <ul> <li>Perform busy treatment</li> </ul>  | ► Call      |
| Transfer to phone number/SIP-URI:   | ► Acc       |
|   | ► Call      |
|   |             |
| Save Changes Cancel   | <b>O</b>    |
|   | = <u>OF</u> |
| $\sim$  | = <u>Bu</u> |
|   | = <u>Co</u> |

Figure 12: Routing Policies – Stranded Calls

#### **Statistics Report Settings**

| Call Center Settings                                    |   |               |
|---|---|---------------|
| 7 SUMMIT AVE , PLANO , Texa                             | 25  | Ma            |
| all Center  |   | ▶ R           |
| A call center automatically process<br>users or agents. | ses incoming calls received by a single phone number, by distributing them to a gro | up of<br>▶ Ec |
| General Announcements                                   | Routing Policies Statistics Passcode Personalized Name                              | ► Ci          |
|   |   |               |
| Statistics Report Settings                              |   |               |
| Daily Report  |   | ► AL          |
| Reporting Period:                                       | 15 Minutes  | ► HI          |
| Email Addresses:  |   | ► Ar          |
|   |   | . ► In        |
|   |   | ► AL          |
| Save Changes Cancel                                     |   | ► Ci          |
| Save changes - Cancer                                   |   | ► Ac          |
|   |   | ► Ca          |
|   |   |               |

Figure 13: Statistics Report Settings

A This menu allows you to determine the treatment of calls remaining in the queue during busy or extended periods of waiting.

Note: Remember to Save Changes

A You can get reports generated by an agent or by a call center supervisor. This page allows you to set up the duration of reports and who should receive them.

The report is in a CSV file format, and contains statistics for the group and by agent.

# Samples of Report Types

| Group                         | Agent                        |
|-------------------------------|------------------------------|
| Number of calls queued        | Number of calls received     |
| Number of busy overflows      | Average time with agent      |
| Number of calls answered      | Time logged off              |
| Average time with agent       | Time busy                    |
| Average time in Queue         | Time idle                    |
| Average agent logged off      | Number of calls not answered |
| Average hold time before loss |                              |

#### **Call Center Passcode**



Figure 14: Call Center Passcode

In Online Feature Management, you can reset the Voice Portal passcode for a call center pilot number.

When you change the passcode on the Call Center page, the passcode is automatically changed for other location services, including Hunt Groups and Auto Attendant.

It does not change the passcode for individual telephone lines or users. The owner of this telephone line will need to permanently reset the passcode through the Voice Portal.

To reset the Voice Portal passcode for the Call Center pilot number:

A Enter the new passcode

B Confirm the passcode

Click Save Changes to confirm.

#### **Enable Personalized Name**



A Check the box Enable Personalized Name

You can upload an audio file with a personalized name for the entire call

B Upload the file

center group.

To do this:

Click Set Personalized Name to confirm.

