Cox Business
IP Centrex Call Center Standard Console
Quick Reference Guide

This guide instructs Call Center Agents and Supervisors on how to use the IP Centrex Call Center Standard Console. It includes an overview of the product's features, descriptions of the screens, and steps on how to perform common tasks.

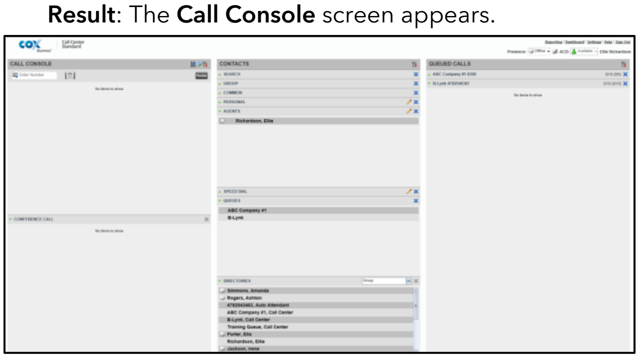
Overview

The Call Center Standard is a carrier-class, communications management product for Call Center agents and supervisors who use the Cox Business IP Centrex hosted voice platform.

Call Center Standard gives Call Center Agents and Supervisors a robust platform from which to handle calls (via automatic call distribution [ACD]), view historical and real-time reports, and monitor queue activity.

Logging In

1. Enter https://console.coxbusiness.com/callcenter in your browser.
2. Enter your MyAccount **User ID** and **Password**. (Optional: Click the **Stay signed in** checkbox to avoid entering your User ID on subsequent launches.) (**Note**: For help with your User ID or Password, contact your MyAccount admin.)
3. Click the **Sign in** button.
   Result: The **Call Console** screen appears.



Agent Tasks

There are two types of Agent licenses: "*Agent*" and "*Agent Console*." The features listed below require the user to have a Seat with an *"Agent"* **plus** an *"Agent Console"* license. Go to page 9 for information on *"Agent"* license functionality.

Call Center Interface

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

- **Global Message Area** is located to the right of the Call Center name. It displays messages to the user.
- **Call Console** is located on the left-hand side of the Call Center main page. Use to manage current calls.
  - **Dialer** – Dial ad hoc numbers.
  - **Conference Call** – Manage conference calls.
- **Contacts Pane** is located in the middle of the Call Center main page. It allows you to make calls to contacts and manage contact directories. It contains the following panels:
  - **Search** to locate contacts
  - **Contact Directories** to access and manage contacts
  - **Directories** to consolidate contacts from multiple directories
  - **Speed Dial** to house frequently dialed numbers
  - **Queues** to transfer calls quickly to a waiting area.

Call Center Interface (cont'd)

- **Links to Other Windows**
  - Reporting provides access to Call Center Reporting.
  - Settings provide access to client configuration pages.
  - Help opens the Cox Business Standard Call Center for IP Centrex Agent/Supervisor User Guide.
  - Sign-Out exits you from the call center console and allows you to Save Your Work [the layout of your console].

Agent Automatic Call Distribution (ACD) States

Monitored agents have their phone and ACD state displayed. A single icon (shown in the table below), to the left of the agent's name, represents the agent's combined phone and ACD state, which indicates the agent's ability to take calls. In addition, the agent's ACD state is also displayed in text following their name.

You are available to receive calls.

You are temporarily unavailable to receive calls.

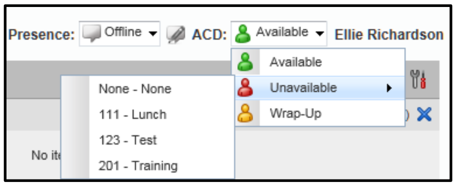
You are unavailable to receive calls.

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 the **ACD States** drop-down arrow and select your new state.
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.

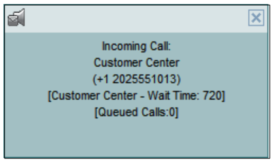


View Incoming Call Details

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.

1. Click the **Web Pop URL** icon in the *Call Notification* pop-up window that appears when you receive a call.

Save vCard

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

1. Click the **Add vCard** icon on the *Call Notification* pop-up window that appears when you receive a call.

Dial an Ad Hoc Number

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

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.

Redial Number

Up to 10 previously dialed numbers are available.

1. 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 the **Call History** icon .
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.

Dial from Search

1. Perform a search using the Search feature.
2. Click the target contact and then click CALL.

Answer Call

Calls can be answered automatically or manually.

To answer calls automatically:

In the *Call Console*, click the **Auto Answer** icon .

> **Note**: This feature works only if your device is Advanced Call Control (ACC)-compliant. In addition, if Auto Answer is enabled on the server, do **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 transferred without an announcement while active, on hold, or incoming.

1. To transfer the call to an ad hoc number, enter the number in the *Dialer* and then click TXR.
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 Announcement

Calls can be transferred while active, on hold, or incoming. Dial the number or contact to transfer the call to the intended recipient. When the call is answered, speak to the party.

1. From the *Call Console,* select the original call.
2. 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 (This function is not available from a remote office.)

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

Resume Call (This function is not available from a remote office.)

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

End Call

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

Generate Call Trace

A Call Trace or "track" contains information about the date and time the call was received, the identity (name and number) of the caller, if available, and the phone number of the user who initiated the trace. You can generate a trace on an active, held, released, or missed call.

To generate a call trace for a current call:

1. 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:

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

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

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

Hold or Resume Conference

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

Leave Conference

1. You can only leave a Three-Way conference.
2. 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

1. In the *Conference Call* panel, select a call and then click the End icon .

Hold Conference Participant

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

Resume Conference Participant

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

End Conference

1. In the *Conference Call* panel header, click the End icon END to release all calls.

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 the **Edit** icon.
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 table below shows the different phone statuses of a supervisor.

Icon	Description
	Idle
	Busy
	Ringing
	Do Not Disturb
	Private
	Forwarding
	Unknown

Make Emergency Call to Supervisor

1. While on a call, click the **Emergency** icon 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 the **Escalate** icon 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 Announcement

1. While on a call, click the **Escalate** icon 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 the **Escalate** icon 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 the **Escalate** icon 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.

Camp on Busy Contact

1. In the *Call Console*, select the call on which to camp.
2. In the *Agents* or *Supervisors* directory, move the mouse over a busy or ringing contact and then click **CAMP**. The call is camped and removed from the *Call Console*.
3. If the call timer expires before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

Display Call History

1. Call History displays your placed, received, and missed calls.
2. In the *Call Console*, click the **Call History** icon.
3. 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 the **Call History** icon.
2. To delete a specific call log, select the call log to delete in the *Call History* dialog box and then click the **Delete** icon 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 the **Options** icon .
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 the **Expand** icon 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** icon 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 the **Reset** icon . (**Note**: The search is **not** case-sensitive.)

Manage Speed Dial and Personal Directories

1. In the *Speed Dial* or *Personal* panel, click the **Edit** icon . The *Edit Speed Dials/Edit Personal Contacts* dialog box appears.
2. To add an entry, click Add. A new row appears.
   a. For a *Speed Dial* entry, select the dial code and enter the number and description of the contact.
   b. 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.

Supervisor Tasks

The features listed below require the user to have a Seat with a *"Supervisor Console"* license.

Monitor Agents

You monitor agents using the *Agents* panel located in the *Contacts* pane. This shows the real-time state of the agents you supervise and it allows you to change the state of an agent.

To select agents to monitor:

1. In the *Agents* panel, click the **Edit** icon .
2. In the dialog box that appears, check the agents to monitor.
3. Click **Save**. The selected agents have their combined phone and ACD state displayed.
4. The state icon of an agent who is not joined in a call center is shaded.

Change Agent's ACD State

1. In the *Agents* panel, click the agent and then click the **ACD** button for that agent.
2. From the drop-down list, select the new state.
3. If you selected *Unavailable*, you may also have to select an unavailability code.

Pick up Agent's Call

1. In the *Agents* panel, click an agent in the *Ringing* state.
2. Click **ANS**. The call appears in the *Call Console*.

Silently Monitor Agent's Current Call

1. The agent to monitor must have exactly one active call.
2. In the *Contacts* pane, expand the *Agents* panel.
3. Click the agent and then click **SM** for the selected agent.
4. A new call is created in the *Conference Call* panel. You are conferenced in to the call and muted.

Supervisor Tasks (cont.)

Silently Monitor Agent's Next Call

1. In the *Agents* panel, click the target agent and then click **SMN**. When the next call is received and answered by the agent, you are conferenced in to the call and your call is muted.

Un-mute Silently Monitored Call

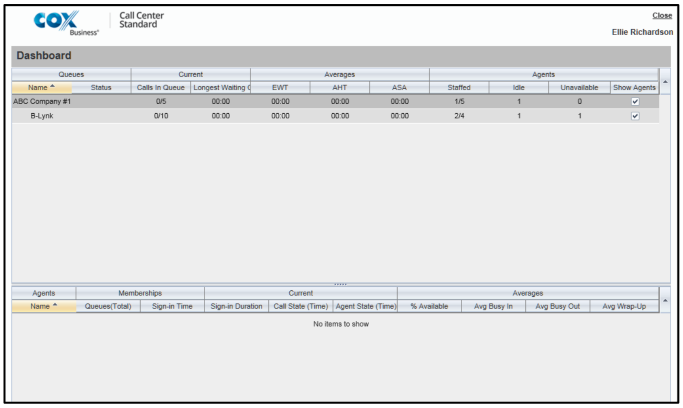
1. While silently listening on a call, click BARGE in the *Conference Call* panel. You can now participate in the conversation.

Barge In on Agent's Call

1. The agent must have exactly one active call.
2. In the *Contacts* pane, expand the *Agents* panel.
3. Click the target agent and then click BARGE for that agent. You are conferenced in to the call.
4. To leave the conference, click LEAVE in the *Conference Call* panel.

View Agents and Queues Statistics

You can view real-time statistics for the monitored call centers and agents assigned to you, using the *Dashboard* window.



- 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. **Note**: By default, agent statistics are not displayed.

To display agent statistics for a call center:

1. In the *Queue Summary*, check the *Show Agents* box in the row for that call center.

Monitor Queues

The *Queued Calls* pane shows selected call centers that you are managing. Each call center is displayed in a separate panel.

To select call centers to monitor:

1. At the top right-hand side of the *Queued Calls* pane, click the **Options** icon and select *Edit Queue Favorite Dialog* from the menu.
2. In the dialog box that appears, check the call centers to display.
3. Click **Save**. The selected call centers appear in the *Queued Calls* pane.

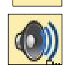
The following information is displayed for each call center:

- Call center name and phone number
- Service Mode icon/button
- Message Waiting icon (if there are new messages)
- Ratio of queued calls to call center's call capacity

The Service Mode icon displays the call center mode, which can be *Normal, Night Service, Night Service Override, Forced Forward*, and *Holiday Service*.

You expand a call center panel by clicking the **Expand** button for that panel. When expanded, the calls queued on that call center appear.

For each call, the following information is displayed:

Call Status Icon	Description
	Call is waiting to be answered.
	Message is being played to caller.
	Call was reordered.
	Call was bounced.

- Name/number of the call center (or DNIS, if applicable) that was called
- Total call time, and in parentheses, the time in the current queue (when applicable)

When you click a call, the following information appears:

- Call position in queue
- Name
- Phone number of the calling party (if available)

Enable Night Service Override or Forced Forwarding

1. In the *Queued Calls* pane, click the **Service Mode** icon in a *Call Center* panel.
2. In the *Edit Queue Favorites* dialog box that appears, check *Night Service Override* or *Forced Forwarding* for each call center for which you want to enable the service(s).
3. For *Forced Forwarding*, enter the forwarding destination.

Note: Forced Forwarding has precedence over Night Service Override.

Position Call in Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the target call and then click **REORDER** for that call.
3. From the drop-down list that appears, select a new position. The call is placed at the new position in the queue.

Note: You cannot place a call ahead of a bounced call.

Transfer Call to Top of Queue

1. In the *Queued* Calls pane, expand a *Call Center* panel.
2. Click the target call and then click **REORDER** for that call.
3. From the drop-down list that appears, select *Send to Front*.

Retrieve Call from Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the target call and then click **RETRIEVE**. The call appears in the *Call Console* and you treat it as any other call.

Transfer Call from Queue to Agent

1. In the *Queued Calls* pane, select the call to transfer.
2. In the *Contacts* pane, expand the *Agents* panel.
3. Click the target agent and then click **TXR** for that agent.

Transfer Call from Queue to Ad-Hoc Number

1. In the *Queued Calls* pane, select the call to transfer.
2. In the *Dialer*, enter the number and click **Transfer**.

Transfer Call between Queues

1. In the *Queued Calls* pane, select the call to transfer.
2. In the *Contacts* pane, expand the *Queues* panel.
3. Click the target queue and then click TXR for that queue.

Reporting

Call Center provides a robust set of reports.

The following reports are available to supervisors:

- Agent Activity (historical or real-time) – This provides metrics about agents' call handling activities for a call center.
- Agent Utilization (historical) – This provides metrics related to agents' call performance for a call center.
- Queue Performance Analysis (historical or real-time) – This displays metrics related to the performance of a call center ACD.
- Service Level (historical) – This displays metrics related to the speed of answering ACD calls.

Enhanced reports are configurable, and the reports available to you depend on your system configuration. For information, consult your administrator.

Note: Agents can only request reports about themselves.

Run 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 **Submit**. The report appears in the *Report window*.

Refresh Report

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

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

Print or Export Report

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

To print a report:

1. Click **Print** at the bottom of the report.

To export a report to a file:

1. At the bottom of the report, click **Export** and select *Excel XML* or *CSV* format.
2. Specify the location where you want to save the file.

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.

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 e-mail 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 the **Load** icon in the row for the report and modify the report as required.
4. To delete a report, click the **Delete** icon 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).

Agent License Description

Agents *without* an Agent Console license use their phones exclusively to manage Call Center calls. They do not have access to the Console.

Note: Press the **More** softkey on the Polycom or Cisco phones to locate additional Call Center Standard functionality by means of the softkeys.

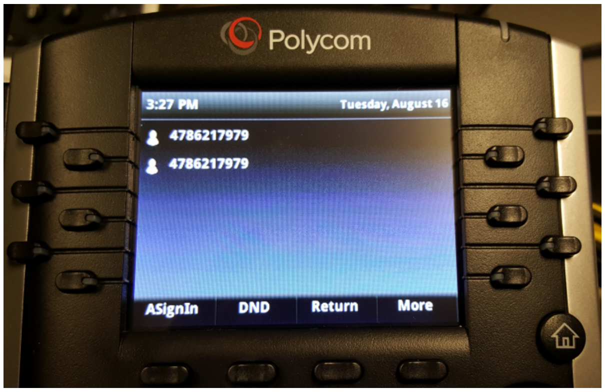
Agent License Tasks

Phone-based Agents can manage their ability to receive and manage calls from their assigned Queues by pressing Softkeys on their phones. This section instructs these users on how to perform common tasks.

Polycom Phones

Log in to a Queue (from a Polycom Phone)

1. From your **Polycom** phone, press the **ASignIn** softkey.



Once signed-in, Agents can manage their Availability status *(Available* and *Unavailable)*.

Change Availability Status (from a Polycom Phone)

1. Log in to your queue. (**Note**: You state is set to **Available** by default.)
2. Press the **Unavailable** softkey and use the scroll arrows on the phone to select the reason; e.g., Out to lunch, Coffee break, and press the **Select** softkey.

3. To change your status back to to "Available," press the **Unavailable** softkey.
4. Use the scroll arrows on the phone to select *None* as the reason and press the **Select** softkey.

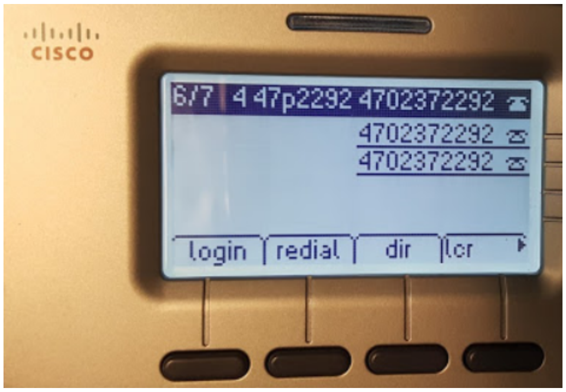
Log Out of a Queue (from a Polycom Phone)

1. From your phone, press the **ASignOut** softkey.

Cisco Phones

Log in to a Queue (from a Cisco Phone)

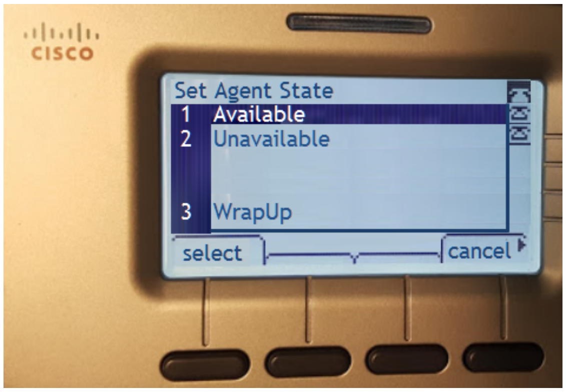
1. From your **Cisco** phone, press the **login** softkey.



Once signed-in, Agents can manage their Availability status *(Available* and *Unavailable)*.

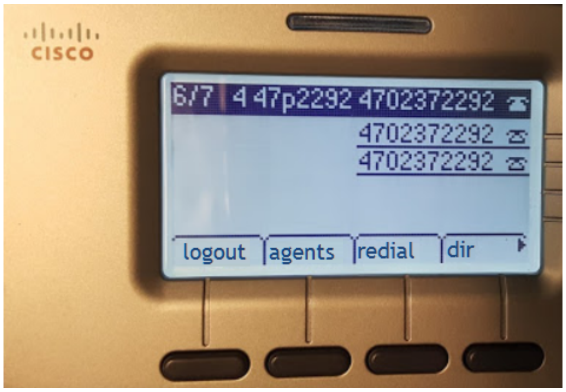
Change Availability Status (from a Cisco Phone)

1. Log in to your queue and use the scroll arrows on the phone to select **Available** or **Unavailable**.
2. Press the **select** softkey.



Log Out of a Queue (from a Cisco Phone)

From your phone, press the **logout** softkey.



Answer a Call

1. Pick up the phone receiver or press the **ANS** softkey.

Transfer Call with Announcement

Calls can be transferred while active, on hold, or incoming. Dial the number or contact to transfer the call to the intended recipient. When the call is answered, speak to the party.

1. Answer an incoming call.
2. Press the **Transfer** softkey.
3. Dial the number to which you want to transfer the call.
4. Announce the caller and press the **Transfer** softkey again.

Blind Transfer Call

1. Answer an incoming call.
2. Press the **Transfer** softkey.
3. Press the **Blind** softkey.
4. Hang up or press the **EndCall** softkey.

Transfer Call to Voicemail

1. Answer an incoming call.
2. Press the **SendVM** softkey and follow the prompts.

Place a Call on Hold and Resume Call

1. Answer an incoming call.
2. Press the **Hold** softkey.
3. Press the **Resume** softkey to take the call off Hold.

Generate Call Trace

1. Press the **Trace** softkey to track the last incoming call.

Start Three-Way Conference

1. Dial the first number.
2. When the call is answered, press the **Hold** softkey.
3. Press the **More** softkey to scroll until you see the **Confrnc** softkey and press that key.
4. Dial the second number and press the **Confrnc** softkey again.

Redial Call

1. Press the **Redial** softkey to dial the last incoming phone number.

Check Voicemail Messages

1. Press the home icon on your phone set.
2. Press the **Select** softkey and highlight the message icon.