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Call Center Telephone Administration Guide

NORTEL

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Call Center Telephone Administration Guide

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Chapter 1

About Call Center

This guide leads a Call Center Administrator through setting up and operating Call Center on a CallPilot 100/150 or BCM50 system. You can program Call Center using any two-line display telephone on your telephone system. You can also use the web-based CallPilot Manager to set up and operate Call Center.

Call Center is an application that handles incoming calls as efficiently and economically as possible. Call Center answers calls, then routes the calls to agents in a skillset that most closely matches the needs of the caller. Calls can be routed based on the origin of the call, the destination of the call, or the information entered by the caller. Callers can be given high or low priorities. Callers can overflow to different groups or skillsets of agents, transfer out of the system, leave a message, and hear announcements and informative messages.

For information about Call Center features, refer to the *Call Center Set Up and Operation Guide*.

What Call Center includes

You can use Enhanced or Basic Call Center on CallPilot. Basic Call Center is available for BCM50.

| Features | Basic Call Center | Enhanced Call Center |
|--|---|--------------------------|
| Skillssets | 2 | 30 |
| Overflow skillssets | 1 | 29 |
| Configured agents (available agent IDs) | 20 | 100 |
| Agent priority levels | 20 | |
| Active agents | 10 | Enhanced: max 50, min 20 |
| Active calls in all skillssets | 15 | 48 |
| Maximum active calls per skillset | 15 | 48 |
| Lines that can be configured for Call Center | 15 | 30 |
| Voice ports (shared with CallPilot or dedicated) | 8 (You can have an additional 8 for CallPilot if you have 2 CallPilots on 1 KSU) | |
| Routing tables per skillset | 2 | |
| Greetings | 30 | 50 |
| Steps per routing table | 20 | |
| Skillset mailboxes | 2 | 30 |
| Supervisors | 10 | 16 |
| Supervisor functionality, including call monitoring | Silent is available only if a MICS 7.0 or later KSU is used. Otherwise, muted mode is available. Only one mode is available at a time, so if silent monitor is available, muted monitor is not. | |
| Maximum simultaneous monitoring sessions | 6 | |
| Day of Week Service: you specify the start times for the day and night skillset for each day of the week | Available | |
| Limited Feature 983 telephone administration | Available | |
| Supervisor Help | Available with Silent Monitor. Not supported with Muted Monitor. | |
| Expected Wait Time | 5 tables | 20 tables |
| Activity Codes | 2,000 entries | |
| Dynamic agent priority levels | Not available | 20 |
| Caller Input Tables | Not available | 30 |
| CallPilot Manager | Available | |
| Call Center Reporting | Enabled with optional Software Authorization Code | Included |
| Dynamic call priority levels | Not available | 20 |

| Features | Basic Call Center | Enhanced Call Center |
|---|--------------------------|-----------------------------|
| Overflow rules per skillset | 20 | 20 |
| Basic Intelligent Caller Input Routing: the ability to route a call to an Operator, Auto Attendant, skillset mailbox, CCR Tree or internal or external number | Available | |
| Advanced Intelligent Caller Input Routing: the ability to route a call based on multi-digit fixed or variable strings | Not available | Available |
| Delegated Call Center Administration: the System Administrator can create a password to give a Call Center Administrator or supervisor access to Call Center administration. | Available | |
| Intelligent Overflow Routing: rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, the Auto Attendant or an operator. | Available | |
| Intelligent CLID/DNIS Routing | Not available | Available |
| Overflow rules per skillset | 20 | |
| Service Mode: you specify the start and end times for the day and night skillset for each day of the week | Available | |

What you can administer through a telephone

Call Center properties

| | |
|-----------------------------------|---|
| Software authorization code | “Enabling the Call Center software authorization code” on page 23 |
| Primary and Secondary Alert times | “Primary and Secondary alert times” on page 25 |
| Reserved Channels | “Reserved channels” on page 26 |
| Supervisor Help | “Setting the Supervisor Help request timeout” on page 28 “Selecting skillsets supervisors can receive help requests from” on page 28 |
| Caller ID display settings | “Setting Caller ID” on page 27 |
| Lines | “Configuring lines” on page 29 |
| Answer lines status | “Setting the Answer Lines status” on page 31 |
| Reset Administrator password | “Resetting the Call Center Administrator password” on page 32 |
| Call Center greetings | “Recording a Call Center greeting” on page 36 NOTE: You must use CallPilot Manager to add Greeting captions. |

Skillsets

| | |
|--|--|
| Parameters: name, number, control DN, Message Waiting Indicator DN, Method of Distribution, Break Time, Delay Answer, Activity Code and Expected Wait Time settings, service mode, prompt language, attendant extension. | “Setting up a skillset” on page 43 |
| Monitor skillsets | “Setting the Service Modes for skillsets” on page 148 “Monitoring skillsets” on page 154 NOTE: you must use CallPilot Manager to set up Caller Input Rules and Expected Wait Time and Activity Code tables. |
| Skillset mailboxes | “About skillset mailboxes” on page 55 |
| initialize a skillset mailbox | “Initializing a skillset mailbox” on page 58 |
| change a skillset mailbox password | “Skillset mailbox password” on page 61 |
| record skillset mailbox greetings | “Recording skillset mailbox greetings” on page 63 |
| play skillset mailbox messages | “Playing skillset mailbox messages” on page 70 |
| Off-premise message notification | “About Off-premise Message Notification” on page 77 |

Agents

| | |
|---|--|
| Agent ID, name, supervisor, automatic answer, missed call options, priority, Activity Code entry type | “Adding an agent” on page 102 |
| Assign agents to skillsets | “Assigning an agent to a skillset” on page 107 |
| Log an agent off | “Logging an agent off” on page 111 |
| Reset an agent password | “Resetting an agent password” on page 113 |
| Monitor agents | “Monitoring agent calls with Silent Monitor” on page 151 |

| Routing | |
|---|---|
| Intelligent Overflow Routing | “Adding Overflow rules” on page 122 |
| Greeting step | “Adding a Greeting step” on page 130 |
| Distribute for step | “Adding a Distribute for step” on page 134 |
| Goto step | “Adding a Goto step” on page 135 |
| Transfer step | “Adding a Transfer step” on page 136 |
| Disconnect step | “Adding a Disconnect step” on page 138 |
| Expected Wait Time tables | NOTE: You must use CallPilot Manager. You cannot administer EWT Tables via telephone. |
| Activity Codes | NOTE: You must use CallPilot Manager. You cannot administer Activity Codes via telephone. |
| Caller Input Rule Tables | NOTE: You must use CallPilot Manager. You cannot administer Caller Input Rule Tables via telephone. |
| Advanced Intelligent Caller Input Routing | NOTE: You must use CallPilot Manager. You cannot administer Advanced Intelligent Caller Input Routing via telephone. |

Related documents

For more information about Call Center refer to the:

- *Nortel Call Center Set Up and Operation Guide*
- *Nortel Call Center Agent Guide*
- *Nortel Call Center Supervisor Guide*
- *Nortel Call Center Reporting Set Up and Operation Guide*

For information about setting up CallPilot refer to the:

- *CallPilot Manager Set Up and Operation Guide*
- *CallPilot Telephone Administration Guide*
- *CallPilot 100/150 Installation and Maintenance Guide*

For information about configuring telephony resources, refer to the:

- *Norstar System Coordinator Guide*

How to get help

USA and Canada

Authorized Distributors - ITAS Technical Support

Telephone:

1-800-4NORTEL (1-800-466-7835)

If you already have a PIN Code, you can enter Express Routing Code (ERC) 196#.

If you do not yet have a PIN Code, or for general questions and first line support, you can enter ERC 338#.

Website:

<http://www.nortelnetworks.com/itas/>

email:

naitas@nortelnetworks.com

Presales Support (CSAN)

Telephone:

1-800-4NORTEL (1-800-466-7835)

Use Express Routing Code (ERC) 1063#

EMEA (Europe, Middle East, Africa)

Technical Support - CTAS

Telephone:

00800 800 89009

Fax:

44-191-555-7980

email:

emeahelp@nortelnetworks.com

CALA (Caribbean & Latin America)

Technical Support - CTAS

Telephone:

1-954-858-7777

email:

csrmtgmt@nortelnetworks.com

APAC (Asia Pacific)

Technical Support - CTAS

Telephone:

+61 388664627

Fax:

+61 388664644

• **email:**

asia_support@nortelnetworks.com

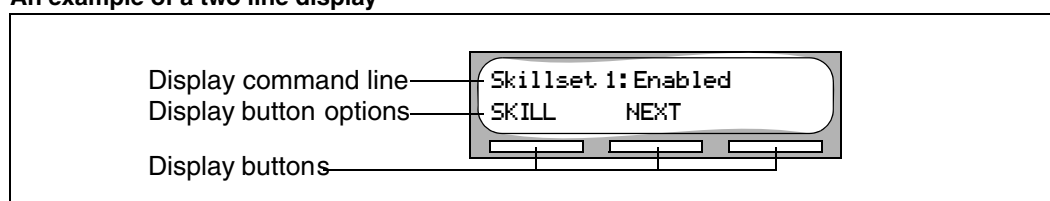
Chapter 2

About Call Center telephone administration

Setting up Call Center with a two line display telephone

You cannot use a single line display telephone to set up and administer Call Center. You must use a two line display telephone. Two line display telephones show Call Center commands and options. A two line display can show up to three display options at once. In some instances, an option does not have a corresponding display button, and you must select the option by pressing buttons on the keypad.

An example of a two line display



System timeout

If you pause longer than 2 minutes (120 seconds) when you program Call Center on a two line display telephone, the system times out and ends the session. This is a safety feature that prevents unauthorized use of the system.

For example, if the system times out before you enter all the settings for a skillset, you must use the procedures in [“Changing skillset properties” on page 49](#) to finish setting up the skillset.

Using the dialpad

The buttons on your display telephone dialpad act as both numbers and letters. Each button represents a number and letters of the alphabet.

| | |
|------------------------------|---|
| To enter a character | press the dialpad button that represents the letter or number. Press the button again to see the next letter or number. |
| To accept a character | press # or press another button. When you press another button, the cursor advances and the display shows the first character on the new button. |
| To delete a character | press the BKSP display button. |

Numbers and letters on the dialpad.

| | | |
|----------------------------|------------------------|---|
| 1 1 ' - | 2 A B C 2 a b c | 3 D E F 3 d e f |
| 4 G H I 4 g h i | 5 J K L 5 j k l | 6 M N O 6 m n o |
| 7 P Q R S 7 p q r s | 8 T U V 8 t u v | 9 W X Y Z 9 w x y z |
| * Quit | 0 Q Z Zero q z | # Accepts the displayed letter and “,” (comma) |

The display can show up to 16 characters. Whether the prompt remains on the display depends on the type of prompt that is displayed.

```
Pswd:1111
OTHR  RETRY  OK
```

This is an example of a display with fewer than 16 characters, where the command line prompt remains on the display.

```
Name:
RETRY  BKSP  OK
```

This display shows the **Name:** command line prompt.

```
P
RETRY  BKSP  OK
```

When you begin to enter the last name, the **Name:** command line prompt disappears. For example, if you enter the name Partridge, you press the pad **7** for P, and the display drops the **Name:** prompt.

```
PARTRIDGE
RETRY  BKSP  OK
```

Although the name is only nine characters long, the command line prompt is not shown on the display after you enter the entire name.

The prompt disappears for these command line prompts:

- Name:
- Log:
- Dest ph:




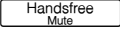

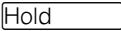

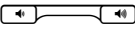
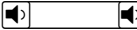
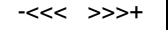



Symbols and conventions used in this guide


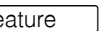



These conventions and symbols are used to represent the Business Series Terminal display and dialpad.


| Convention | Example | Used for |
|---|-------------|---|
| Word in a special font (in the top line of the display) | Pswd: | Command line prompts on display telephones. |
| Underlined word in capital letters (on the bottom line of a two line display telephone) | <u>PLAY</u> | Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed. |
| Dialpad buttons | # | Buttons you press on the dialpad to select a particular option. |


About telephone buttons

This table shows the Nortel Business Series Terminal buttons. Use the buttons that pertain to the type of telephone you use.

| Button name | T7100, T7208, T7316 | M7100, M7208, M7310, M7324 | M7100N, M7208N, M7310N, M7324N |
|----------------|---|--|---|
| Feature |  |  | F_x |
| Handsfree | Bottom right-hand button |  |  |
| Hold |  |  |  |
| Volume Control |  |  |  |
| Release |  |  |  |

You can enter ,  or **F_x** and the code to use a feature. For example, press  9  8  1 to access your mailbox.

The T7100 works differently from other telephones on your system because it does not have line buttons. Where other telephones require that you select a line button to answer a call, on the T7100 terminal you pick up the handset. Where other telephones require you to select a line button to take a call off hold, you press  on the T7100 terminal.


On T7100 terminals, you can answer a second call by pressing . Your active call is put on hold and you connect to the waiting call. You can have no more than two active calls at one time.

Feature codes

You use Feature Codes to perform Call Center functions on your telephone.

Feature Codes are assigned during installation. This guide shows the default Feature Codes. Call Center can also use custom Feature Codes. If the default Feature Codes are used by another application, your system automatically assigns custom Feature Codes. If your System Administrator has assigned custom Feature Codes, you can use the table “[Feature Codes](#)” on page 172 to record the Custom Feature Codes.

To determine the Feature Codes

- 1 Press  9 * 1.

| | |
|------------|-------------|
| Login/out: | F9xx |
| | <u>NEXT</u> |

- 2 The display shows the name and number of the Log In/Log Out Feature Code. xx represents a number between 00 and 99.


- 3 Press NEXT.

| | |
|-------------|-------------|
| Ready Mode: | F9xx |
| | <u>NEXT</u> |

- 4 The display shows the name and number of the Ready Mode Feature Code.

- 5 Press NEXT to see more Feature Codes.

- 6 When the display shows QUIT you have seen all the Feature Codes.

- 7 Press  to end the session.

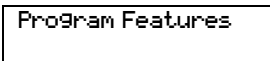
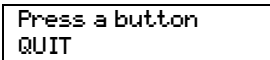
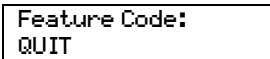
Programming a memory button with a Feature Code

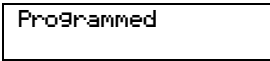
Each Feature Code can be programmed to a memory button. We recommend that you use memory buttons with indicators to program the Feature Codes. A memory button indicator is the triangle next to a memory button.

You can use memory buttons to monitor call activity, and view the Login/Logout and Not Ready status of agents. For information about how the status appears, refer to the *Nortel Call Center Agent Guide*.

For information about using programmed memory buttons to monitor call activity, refer to [“Primary and Secondary alert times” on page 25](#).





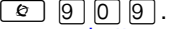




To program a memory button

- 1 Press * .
Do not lift your handset.
- 2 The display shows **Program Features**.

- 3 Press a memory button with an LCD indicator.

- 4 Press .

- 5 Enter the Feature Code number that you want to program.
For example, enter to program the Display Waiting Calls Feature Code. See the tables [“Feature Codes used by Call Center agents” on page 21](#) and [“Agent Feature Codes” on page 21](#) for the Feature Codes.

Repeat steps 1 through 5 for each Feature Code you want to program.
- 6 The display shows that the button is programmed, and then ends the session.


Use the paper labels that come with your telephone to identify the programmed button. To use the Feature Code, press the labeled button.



Feature Codes used by Call Center Administrators and supervisors

| Use this Feature Code | To... |
|---|--|
| Open Mailbox  | <ul style="list-style-type: none"> open skillset mailboxes record skillset mailbox greetings listen to messages in the skillset mailbox |
| Operator Settings  | <ul style="list-style-type: none"> set or change the operator extension indicate whether the operator is available select the day and night service modes for skillsets change the password for Operator Settings <p>For more information on using the Operator Feature Code, refer to “Setting the Service Modes for skillsets” on page 148 and “Resetting the Operator password” on page 167.</p> |
| Voicemail DN  | <ul style="list-style-type: none"> display the skillset mailbox number (Control DN) for each skillset display the extension for Message Waiting Indication for the skillset mailbox reset the passwords of the Call Center Administrator and the operator <p>For information on the Control DN, refer to “Determining a skillset mailbox number” on page 56.</p> <p>For information on resetting the Operator and Call Center Administrator passwords, refer to “Resetting the Call Center Administrator password” on page 32 and “Resetting the Operator password” on page 167.</p> |
| Display Waiting Calls Skillset Status  | <ul style="list-style-type: none"> view real-time status information about skillsets. You can see how busy your call center is so that you can adjust skillset staffing view whether a skillset is enabled or disabled view the number of agents logged on to the skillset view the number of calls waiting view the longest wait time of a call <p>To provide easy, one-button access to the this feature, program a memory button that has an indicator with . Refer to “Programming a memory button with a Feature Code” on page 19.</p> |
| Log on/Log off  | <ul style="list-style-type: none"> log agents off if they forget to log off. <p>For information, refer to “Logging an agent off” on page 111.</p> |
| Monitor agents  | <ul style="list-style-type: none"> lets you monitor agents |
| Supervisor Help  | <ul style="list-style-type: none"> lets you take agents' help requests |
| Not Ready  | <ul style="list-style-type: none"> extend a Break Time period if agents need time after calls to do paperwork or wrap up tasks. For more information about Break Time properties for a skillset, refer to “Break Time” on page 41. |



Note: You can use The Log on/Log off and the Not Ready Feature Codes, but they are used primarily by agents. For information on the Feature Codes used by agents, refer to [“Feature Codes used by Call Center agents” on page 21](#).



Note: While you use a feature, if you press the Feature  button your present feature session ends. Do not press  unless you want to end your current feature session.

Feature Codes used by Call Center agents

If you have Custom Feature Codes, record them in the table “[Feature Codes](#)” on page 172.

Agent Feature Codes

For more information on Agent Feature Codes, refer to the *Nortel Call Center Agent Guide*. For more information on Feature Codes used by supervisors, refer to the “[Feature Codes used by Call Center Administrators and supervisors](#)” on page 20.

| Agents use this Feature Code | To... |
|---|---|
| Open Mailbox <input type="button" value="☎"/> 9 8 1 | <ul style="list-style-type: none"> access messages in a skillset mailbox |
| Log on/Log off Monitor skillsets <input type="button" value="☎"/> 9 0 4 | <ul style="list-style-type: none"> log on when they are in the office view the status of the skillsets they are logged on to. Agents can program a memory button with the Log on/Log off Feature Code. The status of the calls waiting in the skillset is shown by the flash rate of the indicator. For more information refer to “Primary and Secondary alert times” on page 25. |
| Supervisor Help <input type="button" value="☎"/> 9 0 6 | <ul style="list-style-type: none"> requests help from a supervisor |
| Activity Codes <input type="button" value="☎"/> 9 0 7 | <ul style="list-style-type: none"> start a session where they can enter Activity Codes |
| Not Ready <input type="button" value="☎"/> 9 0 8 | <ul style="list-style-type: none"> activate or cancel the Not Ready feature on their telephone. If the work resulting from a call requires extra time to complete, an agent can use the Not Ready Feature Code to prevent Call Center from routing another call to them. If an agent makes a telephone call, or if a supervisor is monitoring a call, they first use the Not Ready Feature Code to activate the Not Ready feature. When the agent is ready to receive calls, they use this Feature Code to cancel the Not Ready feature and receive calls again. If an agent does not answer a call within a certain number of rings, the call is returned to the skillset and the agent telephone is automatically placed into Auto Busy Mode or Auto Logout Mode. The agent must manually cancel the Auto Busy Mode feature by using the Not Ready Feature Code to continue to receive calls. |
| Display Waiting Calls <input type="button" value="☎"/> 9 0 9 | <ul style="list-style-type: none"> see, during peak call periods, which skillsets have the most call activity. |

Chapter 3

Call Center general properties

To set the Call Center general properties you:

- set the Primary and Secondary alert times
- set the number of Reserved channels
- set the CLID parameter
- set the Supervisor Help request timeout value
- select from which skillsets a supervisor can receive help requests
- configure the lines to be answered by Call Center
- set the line answering status


If you do not have Call Center as your primary application, you must enable the Call Center software authorization code. You can also change the Call Center Administrator password if you lose the password or want to change it.

Enabling the Call Center software authorization code

- | | |
|-------------------------------------|---|
| <pre>Log9: QUIT RETRY OK</pre> | <p>1 Press 9 8 3. Enter the Call Center Administrator mailbox number and password, and then press OK.</p> |
| <pre>Admin MBOX AA OTHR</pre> | <p>2 Press 4 4. This option does not appear as a display button option.</p> |
| <pre>Options admin: ADD VIEW</pre> | <p>3 Press ADD to display the system identification number or press VIEW to view the options that are enabled on the CallPilot system.</p> |
| <pre>SN: xxxxxxxxxxxx OK</pre> | <p>4 The display shows the system identification number. Press OK.</p> |
| <pre>Key1: RETRY OK</pre> | <p>5 Enter the first eight numbers of the Call Center software authorization code and press OK.</p> |
| <pre>Key2: RETRY OK</pre> | <p>6 Enter the second eight numbers of the Call Center software authorization code and press OK.</p> |
| <pre>Key3: RETRY OK</pre> | <p>7 Enter the last eight numbers of the Call Center software authorization code and press OK.</p> |
| <pre>Call Center ACCEPT QUIT</pre> | <p>8 Press ACCEPT to enable the keycode.</p> |

Enabled

9 The display shows that the software authorization code is enabled.

10 Press  to end the session.

Setting Call Center general properties

When you set up Call Center you must assign values for the general properties. The general Call Center properties are:

Primary and Secondary alert times

Alert times are time limits for calls waiting in skillsets. The Secondary alert time must be greater than the Primary alert time. You can have Primary and Secondary alerts for all the calls in the call center, or for just the calls waiting in skillsets that you are logged on to.

If a call exceeds the Primary alert time:

- a memory button indicator programmed with Display Waiting Calls () flashes slowly. flashes based on the status of all the calls in the call center.
- a memory button indicator programmed with Agent Login () flashes slowly. flashes based on the status of the calls for the skillsets an agent is logged on to.

If a call exceeds the Secondary alert time:

- a memory button indicator programmed with Display Waiting Calls () flashes quickly. flashes based on the status of all the calls in the call center.
- a memory button indicator programmed with Agent Login () flashes quickly. flashes based on the status of the calls for the skillsets an agent is logged on to.

A slowly flashing indicator alerts you that a call has exceeded the Primary alert time. A quickly flashing indicator alerts you that a call has exceeded the Secondary alert time. The indicator stops flashing when the calls are handled.

You assign alert times in minutes and seconds. There is no default value for alert times.

For how to program a memory button, refer to [“Programming a memory button with a Feature Code” on page 19](#).



Note: Agents do not have to be logged on to see the Display Waiting Calls memory button flashing. A memory button must be programmed with the Display Waiting Calls Feature Code and the Primary alert time must be set up for the memory button to show waiting calls status.

Reserved channels

Reserved channels are voice channels that are reserved for use by Call Center. If you reserve channels for Call Center, you ensure that callers are played skillset announcements, and CallPilot does not use all of the voice channels.

A reserved channel is used when:

- a Call Center greeting plays to a caller
- Off-premise Message Notification notifies you that there is a message in a skillset mailbox

To set Call Center general properties

- | | |
|--|--|
| Log: QUIT RETRY <u>OK</u> | 1 Press <u>[*] 9 8 3</u> . Enter the Call Center Administrator mailbox number and password, and then press <u>OK</u> . |
| Admin MBOX AA <u>OTHR</u> | 2 Press <u>OTHR</u> . |
| Admin GLIST CCR <u>CC</u> | 3 Press <u>CC</u> . |
| CC Admin AGENT SKILL <u>OTHR</u> | 4 Press <u>OTHR</u> . |
| CC Admin GRTG <u>PARM</u> | 5 Press <u>PARM</u> . |
| Refresh chans: 1 CHNG <u>NEXT</u> | 6 Press <u>CHNG</u> if you want to change the number of reserved channels (from 0 - 6) and press <u>NEXT</u> or press <u>NEXT</u> . |
| Pri alert: xx:xx CHNG <u>NEXT</u> | 7 Press <u>CHNG</u> to set a Primary Alert time or press <u>NEXT</u> and go to step 10. |
| Pri alert mms: RETRY | 8 Enter the Primary Alert time. This is a four digit field. Add a zero to any single digit hour or minute. |
| Pri alert: xx:xx CHNG <u>NEXT</u> | 9 The display shows the Primary Alert time. Press <u>NEXT</u> . |
| Sec alert: xx:xx CHNG <u>OK</u> | 10 Press <u>CHNG</u> to set a Secondary Alert time or press <u>NEXT</u> and go to step 13. |


```
Sec alert mms:
RETRY
```

- 11** Enter the Secondary Alert time.
This is a four digit field. Add a zero to any single digit hour or minute.

```
Sec alert: xx:xx
CHNG      OK
```

- 12** The display shows the Secondary Alert time.
Press OK.

```
CC Admin
GRTG    PARM
```


- 13** Press  to end the session.

Setting Caller ID

You can select how you want caller information to be displayed on agent telephones:

- Name and number: displays the caller's name for 3 seconds and then the skillset name. If the caller's name is not available, the caller's number is shown.
- Number only: displays the caller's number for 3 seconds and then the skillset name.
- No Caller ID: displays the skillset name.

```
Log:
QUIT    RETRY    OK
```

- 1** Press  9 8 3 .
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA      OTHR
```

- 2** Press OTHR.

```
Admin
GLIST   CCR      CC
```

- 3** Press CC.

```
CC Admin
AGENT   SKILL   OTHR
```


- 4** Press OTHR.

```
CC Admin
GRTG    PARM
```

- 5** Press PARM.

```
CLID: No CLID
CHNG      NEXT
```

- 6** Press NEXT until this display appears.
Press NEXT to select no CLID
or
press CHNG to select Number Only or Name and Number.

- 7** Press  to end the session.

Setting the Supervisor Help request timeout

The Supervisor Help Request Timeout is when to escalate a request if the chosen supervisor does not answer the help request. You can enter a value between 1 and 60 seconds. The default is 12 seconds.

- | |
|-------------------------|
| Log: |
| QUIT RETRY <u>OK</u> |
- 1 Press .
Enter the Call Center Administrator mailbox number and password, and then press OK.
- | |
|------------------------|
| Admin |
| MBOX AA <u>QTHR</u> |
- 2 Press QTHR.
- | |
|------------------------|
| Admin |
| GLIST CCR <u>CC</u> |
- 3 Press CC.
- | |
|----------------------------|
| CC Admin |
| AGENT SKILL <u>QTHR</u> |
- 4 Press QTHR.
- | |
|------------------|
| CC Admin |
| GRTG <u>PARM</u> |
- 5 Press PARM.
- 6 Press to end the session.

Selecting skillsets supervisors can receive help requests from

The Supervisor Help From setting lets you determine where escalated requests go.

- All skillsets: sends an unanswered help request system-wide to all Call Center supervisors.
- Agent's skillsets only: sends an unanswered help request to only the supervisors logged on to skillsets that the agent is assigned to. From the Supervisor Help From options select all skillsets or agent's skillsets only.

- | |
|-------------------------|
| Log: |
| QUIT RETRY <u>OK</u> |
- 1 Press .
Enter the Call Center Administrator mailbox number and password, and then press OK.
- | |
|------------------------|
| Admin |
| MBOX AA <u>QTHR</u> |
- 2 Press QTHR.
- | |
|------------------------|
| Admin |
| GLIST CCR <u>CC</u> |
- 3 Press CC.
- | |
|----------------------------|
| CC Admin |
| AGENT SKILL <u>QTHR</u> |
- 4 Press QTHR.
- | |
|------------------|
| Sup Help: |
| CHNG <u>NEXT</u> |
- 5 Press NEXT until this display appears.
Press NEXT to accept the default value of All Skillsets or press CHNG to choose Agent's skillsets only.
- 6 Press to end the session.

Configuring lines

Before Call Center can answer an incoming line, you must assign the line to be answered by a Call Center skillset. You can configure a maximum of 15 lines for Basic Call Center and 30 for Enhanced. The line numbers can be any line number from 1 to 500.

For each line that you want Call Center to answer, you assign:

- the line to be answered by Call Center
- the skillset that calls on this line go to
- the number of rings before the line is answered

You can record your line answering information in the table [“Line answering” on page 179](#).

You must disable a skillset and wait until there are no calls in the skillset before you can add lines to it. You cannot add lines to a skillset while it is in use. For how to disable a skillset refer to [“Disabling a skillset” on page 48](#).



Note: Target lines that are assigned to a B2 skillset cannot have their prime extension programmed as the Control DN of the skillset. This is restricted by the software. The recommended setting for these lines is blank.

For information on how to program the prime extension, refer to the *Norstar System Coordinator Guide*.

Lines that are programmed to be answered by Call Center must not be programmed to be answered by another peripheral or application.

To delay calls being answered, you can assign Call Center to answer incoming calls after a specified number of rings. The number of rings ranges from zero to 12. If the number of rings is zero, Call Center answers immediately.

For analog lines equipped with Caller ID, you must set the number of rings to two or more. Caller ID information is not provided until just prior to the second ring, so if you set the number of rings to zero or one, Caller ID information is not relayed.

Long distance charges start when a call is answered by Call Center. To minimize long distance charges, set the ring count higher than 0 so that calls spend more waiting time in a ringing state.

To configure lines for Call Center

```
Log:
QUIT  RETRY  OK
```

- 1** Press **[*] 9 8 3**.
Enter the Call Center Administrator mailbox number and password, and then press **OK**.

```
Admin
MBOX  AA  OTHR
```

- 2** Press **AA**.

```
Auto Atdt Admin
GRTG  TABLE  LINES
```

- 3** Press **LINES**.

```
Line number:
RETRY  OK
```

- 4** Enter the line number and press **OK**.

```
Line:x      Ans:No
CHNG      NEXT
```

- 5** Press **CHNG**.

```
Line:x      Ans:AA
CHNG  TABLE  NEXT
```

- 6** Press **CHNG**.

```
Line:x      Ans:CC
CHNG  SKILL  NEXT
```

- 7** Press **SKILL**.

```
Skill number:
RETRY  OK
```

- 8** Enter the number of the skillset you want to answer the line and press **OK**.

```
Line:x      Skill:1
CHNG  RINGS  NEXT
```

- 9** Press **RINGS**.

```
Line:x      Rings:0
CHNG  ANS  NEXT
```

- 10** Press **CHNG**.

```
No of rings:
RETRY  OK
```

- 11** Enter the number of rings and press **OK**.

```
Line:x      Rings:x
CHNG  ANS  NEXT
```

- 12** Press **NEXT** to configure another line or press **[*]** to end the session.

Setting the Answer Lines status

The Answer Lines status determines whether Call Center answers the assigned lines. If the Answer Line status is set to Yes, Call Center answers the lines assigned as Call Center and CallPilot answers the lines assigned as AA. If the Answer Line status is set to No, neither Call Center nor CallPilot answers lines.

To set the Answer Lines status

```
Pswd:
RETRY      OK
```

- 1 Press .

Enter the Operator password, and then press **OK**.

The default Operator password is

(Operator). To change the Operator password refer to [“Resetting the Operator password”](#) on page 167.

```
Choose option
OPER      MODE
```

- 2 Press **OPER**.

```
Atdt avail: x
CHNG     NEXT
```

- 3 Press **NEXT**

```
Business open: x
CHNG     NEXT
```

- 4 Press **NEXT**.

```
Answer lines? N
CHNG     NEXT
```

- 5 Press **CHNG**.

If you set Answer Lines to N the display shows **Disabling...**

If you set Answer Lines to Y the display shows **Enabling...**

- 6 Press to end the session.

Resetting the Call Center Administrator password

You can reset the Call Center Administrator password by resetting the password to the default password and then creating a new password. You can reset the password to keep the system secure, and to create a new password if you forget the Call Center Administrator password.

If you reset the password, you must log on to the Call Center Administrator mailbox using the default password 0000 and create a new password.



Warning: Change the System Administrator password frequently to minimize the risk of unauthorized activity. If you reset the Call Center Administrator password, log on to the Call Center Administrator mailbox and create a new password immediately to prevent unauthorized access to the system.

| Default Call Center Administrator Mailbox number and password combinations | | | |
|--|--|--|---|
| For a mailbox number length of... | the default Call Center Administrator Mailbox number is... | and the default Call Center Administrator Mailbox password is... | so the combined mailbox number and password is... |
| 2 | 12 | 0000 | 120000 |
| 3 | 102 | 0000 | 1020000 |
| 4 | 1002 | 0000 | 10020000 |
| 5 | 10002 | 0000 | 100020000 |
| 6 | 100002 | 0000 | 1000020000 |
| 7 | 1000002 | 0000 | 10000020000 |

To reset the Call Center Administrator password

Set <xxxx> OK

- 1 Press .
The Voicemail DN appears on your display.

Pswd:
RETRY OK

- 2 Press .

Pswd:
RETRY OK

- 3 Enter Resetsmpswd or and press OK or .


Reset Pswd?
YES NO

- 4 Press YES.

Exit

- 5 This display appears.

- 6 Press .
Log on by following the voice prompts. Use the default password 0000.

- | | |
|--|---|
| <div style="border: 1px solid black; padding: 2px;">Must change pswd</div> | 7 This display appears briefly to indicate that you must change your password. |
| <div style="border: 1px solid black; padding: 2px;">Pswd: RETRY OK</div> | 8 Enter a new password from four to eight digits long that does not start with zero. Press <u>OK</u> or # . |
| <div style="border: 1px solid black; padding: 2px;">Again: RETRY OK</div> | 9 Reenter your new password and press <u>OK</u> or # . |
| <div style="border: 1px solid black; padding: 2px;">Password OK</div> | 10 Press  to end the session. |

Chapter 4

Call Center greetings

About Call Center greetings

Call Center greetings encourage callers to stay on the line until an agent is available. You can record greetings in different languages and change them as often as you like. If you use Basic Call Center you can record a maximum of 30 Call Center greetings, or 50 greetings if you use Enhanced Call Center.

You can include information in your greetings such as:

- your hours of service
- a request for callers to have their account number ready
- how to leave a message
- an announcement of a sale
- product lists
- upcoming special events

Types of Call Center greetings

You can record different types of greetings for Call Center. Before you record your greeting, determine what information the greeting includes. When you prepare your greeting, include important times and dates. Keep greetings as short and concise as possible. Use the following examples of greetings as a reference.

| | |
|---------------------------------|--|
| General company greeting | <p>The general company greeting tells callers they have reached the correct company. It can also include the location and business hours of your company.</p> <p><i>“Thank you for calling Bridgestone Computers. We are located at 52 Main Street. Our hours of service are Monday to Friday from 8:00 until 5:00. Please stay on the line and an agent will be with you as soon as possible. Or press 0 to leave a message and one of our agents will return your call.”</i></p> |
| Please wait greeting | <p>Please wait greetings encourage callers to stay on the line.</p> <p><i>“All our agents at Bridgestone Computers are currently busy, but please hold as your call is very important to us.”</i></p> |
| Information greeting | <p>An information greeting provides messages and announcements to callers.</p> <p><i>“Thank you for calling Bridgestone Computers. This week we have extended our hours until we sell all spring merchandise. We will be open until 9:00 pm Monday through Thursday, and we will be open until midnight on Friday! Please come in and see us at 52 Main Street.”</i></p> |

| | |
|------------------------------------|--|
| Transfer greeting | A transfer greeting lets a caller transfer their call. <i>"Please press 1 to leave a message and one of our agents will return your call. Press 2 to return to the previous choices."</i> |
| Non-business hours greeting | Your non-business hours greeting will be played after your business is closed: <i>"You have reached Bridgestone Computers. Our hours of service are Monday to Friday from 8:00 until 12:00 and 1:00 until 5:00. To leave a message, please press 0. An agent will return your call when we re-open. Thank you for calling."</i> |

Recording a Call Center greeting


Before you record a greeting, write the greeting out so that you include everything that you want to say.

We recommend that you record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, callers must wait in a skillset a longer time before they hear another greeting.

To record a Call Center greeting

- | | |
|--|--|
| Log: QUIT RETRY <u>OK</u> | 1 Press <u>9</u> <u>8</u> <u>3</u> . Enter the Call Center Administrator mailbox number and password, and then press <u>OK</u> . |
| Admin MBOX AA <u>OTHR</u> | 2 Press <u>OTHR</u> . |
| Admin GLIST CCR <u>CC</u> | 3 Press <u>CC</u> . |
| CC Admin AGENT SKILL <u>OTHR</u> | 4 Press <u>OTHR</u> . |
| CC Admin <u>GRTG</u> PARM | 5 Press <u>GRTG</u> . |
| CC greeting: RETRY <u>OK</u> | 6 Enter the number of the greeting you want to record and press <u>OK</u> . |
| CC greeting: x RETRY PLAY <u>REC</u> | 7 Lift the handset and press <u>REC</u> . |
| Record greeting: RETRY <u>OK</u> | 8 Record your greeting using the telephone handset. Do not use handsfree. When you are finished press <u>OK</u> . |
| Accept greeting? RETRY PLAY OTHR | 9 Press <u>PLAY</u> to listen to the greeting or press <u>RETRY</u> to re-record the greeting. |

CC greeting:
RETRY OK

- 10** Enter another greeting number and press **OK** to record another greeting
or
press  to end the session.

Chapter 5

Setting up skillsets

About skillsets

Call Center skillsets answer and distribute calls to agents as they become available. Skillsets hold calls for different call center departments, such as sales and technical support.

You can have a maximum of 2 skillsets for Basic Call Center or 30 skillsets for Enhanced Call Center.

You cannot change the properties of a skillset while it is enabled. You must disable the skillset. If you want to change the CDN, disable the skillset and wait until there are no calls in the skillset before you change the CDN.

How incoming calls are sent to a skillset

Incoming calls are sent to a skillset in one of the following ways:

- You assign a line to be answered directly by a skillset. For information about configuring lines refer to [“Configuring lines” on page 29](#).
- A receptionist, agent or subscriber receives a call and transfers the call to a skillset. They can transfer the call to a skillset by pressing or **TRANSFER** and entering the CDN of the skillset. The receptionist, agent or subscriber must not use the Call Pickup feature.
- The Automated Attendant or a CCR Tree answers the call and the caller makes a selection that routes them to the CDN of the skillset.
- Calls can be forwarded to the Voicemail extension of the skillset by Call Forward All Calls (CFAC), Call Forward No Answer (CFNA) or Call Forward On Busy (CFB). For information about these features, refer to the *Norstar System Coordinator Guide*.



Note: Agents are restricted in how they can use CFAC, CFNA and CFB. For more information refer to [“Important considerations about how agents use features” on page 168](#).


Skillset properties

| | |
|------------------------|--|
| Skillset number | Number of the skillset: 1 or 2 for Basic, 1-30 for Enhanced. |
| Control DN | <p>The Control Directory Number is the extension associated with the skillset. Incoming calls transfer to the CDN of each skillset from extensions, the Automated Attendant or Custom Call Routing. The CDN is the skillset mailbox number.</p> <p>When you assign a CDN to a skillset:</p> <ul style="list-style-type: none"> • It can be a B1 extension number that is not connected to any telephone or peripheral. • It can be a B2 extension that is not connected to a B2 application. • If a telephone or any other device uses the same extension the call center will not answer calls. • The range of B1 and B2 extensions can be determined by using the Unified Manager. The DNs do not have to be physically equipped with a Media Bay Module. • The system assigns a skillset mailbox that uses the CDN as its mailbox number. You must initialize the mailbox before you can use the skillset or the mailbox. • Do not rename a telephone DN to a telephone DN used by Call Center. • It is possible for i2004 devices to be assigned to the DN used by Call Center. The user does not receive an error message if this happens, even though i2004 devices usually warn a user if there are conflicting telephone DNs. Therefore, it is imperative that the i2004 programming record contains a list of CDNs used by Call Center. <p>Limitations for B1 and B2 extensions:</p> <ul style="list-style-type: none"> • A B1 extension number is the extension number that you dial to call a telephone or peripheral. A B2 extension is a spare extension that exists with every telephone but is generally not used. Some peripherals use a B2. • Both B1 and B2 extensions can answer external calls. • Both B1 and B2 extensions can have external calls transferred to them by a third person. • B1 extensions allow a set to be CFB or CFNA to them. B2 extensions do not support CFB or CFNA. Therefore a skillset that uses a B2 CDN cannot have calls forwarded to it from telephone programming. • B2 CDNs cannot be used as a prime set for target lines. • Since assigning CDNs does not require additional hardware, we recommend using B1 CDNs over B2 CDNs. B1 CDNs have better functionality than B2 CDNs. |
| Name | <p>The skillset name is displayed:</p> <ul style="list-style-type: none"> • on Call Center displays to identify the skillset • in reports • as the skillset mailbox name <p>The skillset name can be a maximum of 16 characters. If you do not enter a name, the skillset name defaults to <i>SKILLx</i> where <i>x</i> is the skillset number. The name for each skillset is the same as the skillset mailbox name.</p> |

| | |
|---|--|
| MWI ext (Message Waiting Indication extension) | The Message Waiting Indication extension is an optional telephone number that indicates that a skillset mailbox has messages waiting. The MWI extension that you assign shows <i>Message for you</i> on the telephone display when there are new messages in the skillset mailbox. The MWI DN defaults to None. If you forget the MWI extensions for a skillset mailbox, you can view the MWI extensions by using the procedure “Determining a skillset mailbox number” on page 56 . |
| Method of Call Distribution | The method of call distribution determines to which of several available agents to route the call. There are two methods of call distribution: Longest Idle and Preferred. Longest Idle routes the call to the agent who has been available the longest. Preferred routes the call to the agent with the highest priority (best qualified agent is 1). If there are several agents with the highest priority, the agent available longest with that priority is selected. The default method of call distribution is Longest Idle. |
| Break Time | Break Time is a time period for agents to complete paperwork after they finish a call. After an agent completes a call, they are taken out of the skillset for the Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code. For more information, refer to “Not Ready” on page 20 . The Break Time period can last from zero to 59 minutes, 59 seconds. The Break Time defaults to 30 seconds. You can change the Break Time period to zero if an agent does not need a Break Time. |
| Delay Answer | <p>Delay Answer is a toll-saving feature that prevents Call Center from answering calls and playing greetings when there are no agents available. When a call comes in on a line belonging to a skillset that has no free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever happens first. During the Delay Answer time, the waiting callers hear ringback.</p> <p>To activate the Delay Answer feature, enter a time for Delay Answer. The Delay Answer time can be a minimum of zero seconds and a maximum of 10 minutes. The default Delay Answer time is 00:00.</p> |
| Attendant extension | The attendant extension is the extension used if a caller presses the Operator key during a greeting step, a transfer step, or while listening to a mailbox greeting. The attendant extension is optional. If you do not assign an attendant extension, the call is sent to the system attendant extension. |
| Language preference | Language preference can be either Primary or Alternate. The language preference is the language choice used for prompting callers who transfer to the Automated Attendant or CCR. You can choose a language preference only if your system is configured as bilingual. |
| Activity Codes | <p>Activity Code entry types are Prompted and Optional. If you select Prompted, the agent is prompted to enter Activity Codes on their telephone. If you select Optional, an Activity Code session is not automatically displayed on the agent’s telephone, but they can press F907 and enter Activity Codes.</p> <p>Optional is the default. If you do not have Call Center Reporting enabled on your system, this setting does not appear.</p> |

| | |
|---------------------------|---|
| Expected Wait Time | <p>Expected Wait Time parameters are:</p> <p>EWT sample: How many previous calls are used to calculate EWT. You can enter a number between 2 and 256 calls.</p> <p>EWT Increase Allowed: Enabled by default, which means that EWT is recalculated if it increases, and the appropriate EWT greeting is played. If not enabled, callers do not hear recalculated expected wait times if the wait time increases. Whether enabled or not, callers hear the appropriate EWT greeting if the wait time decreases.</p> <p>Initial Call Duration: The Initial Call Duration is used to compute expected wait time until sufficient call statistics are obtained. The average call duration is updated whenever a call is released from an agent. This can be a value between 00:01:00 and 24:00:00. The default is 00:03:00.</p> |
| Service Mode | <p>The service modes are: Auto, Day, Night, 24 Hour.</p> <p>The default is 24 hour operation.</p> <p>For more information about Service Mode see “Setting the Service Modes for skillsets” on page 148.</p> |



Note: Although you can set Activity Code and Expected Wait Time parameters through , you must use CallPilot Manager to create Activity Codes and Expected Wait Time tables. For more information, refer to the *Call Center Set Up and Operation Guide* or CallPilot Manager online help.

Setting up a skillset

You can record skillset properties in the table “[Call Center skillsets](#)” on page 174.

To set up a skillset

- | | |
|--|---|
| <pre>Log: QUIT RETRY <u>OK</u></pre> | <p>1 Press <u>9</u> <u>8</u> <u>3</u>. Enter the Call Center Administrator Mailbox number and password, and then press <u>OK</u>.</p> |
| <pre>Admin MBOX AA <u>OTHR</u></pre> | <p>2 Press <u>OTHR</u>.</p> |
| <pre>Admin GLIST CCR <u>CC</u></pre> | <p>3 Press <u>CC</u>.</p> |
| <pre>CC Admin AGENT <u>SKILL</u> OTHR</pre> | <p>4 Press <u>SKILL</u>.</p> |
| <pre>Skillset: RETRY QUIT <u>OK</u></pre> | <p>5 Enter the number of the skillset you want to set up and press <u>OK</u>.</p> |
| <pre>Status: uninit <u>SETUP</u> QUIT</pre> | <p>6 Press <u>SETUP</u>.</p> |
| <pre>SKILLx CHNG NEXT</pre> | <p>7 Press <u>CHNG</u> to assign a name to the skillset or press <u>NEXT</u> if you do not want to assign a name to the skillset and go to step 10. If you do not enter a skillset name the skillset name defaults to SKILLx, where x is the skillset number, as shown here.</p> |
| <pre>Skillset name: RETRY BKSP <u>OK</u></pre> | <p>8 Enter the skillset name and press <u>OK</u>. For how to enter characters on the dialpad refer to “Using the dialpad” on page 16.</p> |
| <pre>xxxx CHNG <u>NEXT</u></pre> | <p>9 The skillset name is displayed. Press <u>NEXT</u>.</p> |
| <pre>CDN: RETRY <u>OK</u></pre> | <p>10 Enter the CDN of the skillset and press <u>OK</u>.</p> |
| <pre>CDN: xx CHNG <u>NEXT</u></pre> | <p>11 Press <u>NEXT</u>.</p> |
| <pre>MWI ext: xx CHNG NEXT</pre> | <p>12 If you want to assign an MWI extension, press <u>CHNG</u> or if you do not want to assign an MWI extension, press <u>NEXT</u> and go to step 15.</p> |
| <pre>Ext: RETRY <u>OK</u></pre> | <p>13 Enter the extension of the telephone you want to use for MWI and press <u>OK</u>.</p> |

```
MWI ext: xx
CHNG      NEXT
```

14 Press NEXT.

```
Method: Least busy
CHNG      NEXT
```

15 Press CHNG to change the method of call distribution to Preferred (Prefer) and press NEXT
or
press NEXT to accept the default of Longest idle (Least busy).

```
Break: 00:30
CHNG      NEXT
```

16 Press CHNG if you want to change the default Break time
or
press NEXT to accept the default time 00:30 and go to step 19.

```
Break mss:
RETRY     OK
```

17 Enter the Break time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.

```
Break: xx:xx
CHNG      NEXT
```

18 Press NEXT.

```
Delay ans: 00:00
CHNG      NEXT
```

19 Press CHNG to set up a Delay Answer time
or
press NEXT and go to step 22.

```
Delay ans mss:
RETRY     OK
```

20 Enter a Delay Answer time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.

```
Delay ans: xx:xx
CHNG      NEXT
```

21 Press NEXT.

```
Atdt: (none)
CHNG      NEXT
```

22 Press CHNG to assign an attendant to the skillset
or
press NEXT and go to step 25.

```
Ext:
RETRY     QUIT
```

23 Enter the extension number of the attendant set.

```
Atdt: xx
CHNG      NEXT
```

24 Press NEXT.

```
Prompt lang: Pri
CHNG      NEXT
```

25 Press CHNG to use the alternate language prompts and press NEXT
or
press NEXT to use the primary language prompts.

```
AC Entry: OPT
OPT  PRMPT  NEXT
```

26 Press NEXT if your Call Center does not use Activity Codes and go to step 27
or
if your Call Center uses Activity Codes, select the Activity Code entry type: OPT for Optional, PRMPT for Prompted and press NEXT. This prompt appears only if you have Call Center Reporting enabled on your system.

NOTE: Although you can set this Activity Code parameter by telephone, you must use CallPilot Manager to create Activity Codes. For more information, refer to the *Call Center Set Up and Operation Guide* or CallPilot Manager online help.

```
EWT sample: 10
CHNG          NEXT
```

27 If you use Expected Wait Time, enter how many calls you want to use to calculate ETW. The range is 2-256 calls. The default is 10.

If you do not use Expected Wait Time, go so step 30.

```
EWT allow incr: Y
CHNG          NEXT
```

28 If you use Expected Wait Time, select whether you want EWT to be recalculated if it increases, and the appropriate EWT greeting to be played. The default is Y.

```
EWT ICD: 00:03:00
CHNG          NEXT
```

29 If you use Expected Wait Time, enter the Initial Call Duration. This can be a value between 00:01:00 and 24:00:00, and is used to compute expected wait time until sufficient statistics are obtained. The default of 3 minutes is shown.
Press CHNG if you want to change the default
or
press NEXT to accept the default time and go to step 30.

```
Mo: 24 hour
CHNG          NEXT
```

30 Press CHNG to change the service mode for Monday
or
press NEXT.

```
Day start: hhmm
RETRY          OK
```

31 Enter the Day Routing Table start time and press OK. This is a four digit field. Add a zero to any single digit hour or minute.

```
Day hhmm: xxxx
RETRY    AM    PM
```

32 Press AM or PM.

```
Night start: hhmm
RETRY          OK
```

33 Enter the Night Routing Table start time and press OK. This is a four digit field. Add a zero to any single digit hour or minute.

```
Night hhmm: xxxx
RETRY    AM    PM
```


34 Press AM or PM.

Mo: xxxxa-xxxxP
CHNG 24HR NEXT

35 The start times for the Day and Night Routing Tables for Monday are shown.
Press NEXT.

Tu: 24 hour
CHNG NEXT

36 Repeat steps 28 through 33 to set up the Day and Night Routing Tables for the rest of the week.

37 Press  to end the session
or
repeat steps 4 through 36 to set up another skillset.

Enabling a skillset

After you set up a skillset, calls will not be answered until you enable it. If you disable a skillset, no new calls are accepted in the skillset. Calls that are in the skillset are distributed until the calls are ended.

Before you can enable a skillset you must:

- set up the skillset using the procedure [“To set up a skillset” on page 43](#)
- initialize and record a greeting for the skillset mailbox using the procedure [“Initializing a skillset mailbox” on page 58](#)
- set up the Day and Night Routing Tables using the procedures in [Chapter 10, “Routing table administration,” on page 127.](#)

To enable a skillset

| | |
|--|--|
| <pre>Log: QUIT RETRY OK</pre> | 1 Press [*] 9 8 3 . Enter the Call Center Administrator Mailbox number and password, and then press OK . |
| <pre>Admin MBOX AA OTHR</pre> | 2 Press OTHR . |
| <pre>Admin GLIST CCR CC</pre> | 3 Press CC . |
| <pre>CC Admin AGENT SKILL OTHR</pre> | 4 Press SKILL . |
| <pre>Skillset: RETRY QUIT OK</pre> | 5 Enter the number of the skillset you want to enable and press OK . |
| <pre>Status: Disabled CHNG NEXT</pre> | 6 Press CHNG to change the status from disabled to enabled. |
| <pre>Status: Enabled CHNG NEXT</pre> | 7 The display shows that the skillset is enabled. |
| <pre>Skill mbox Pswd RESET NEXT</pre> | 8 Press RESET to reset the password for the skillset mailbox or press NEXT to continue. |
| | 9 Press [END] to end the session. |

Disabling a skillset

You must disable a skillset if you want to change the skillset properties or administer the lines.

If you disable a skillset, no new calls go to the skillset. Any calls that are in the skillset are distributed until the calls are ended.

To disable a skillset

```
Log:
QUIT  RETRY  OK
```

- 1 Press **[*] 9 8 3**.
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX  AA  OTHR
```

- 2 Press OTHR.

```
Admin
GLIST  CCR  CC
```

- 3 Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press SKILL.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to disable and press OK.

```
Status: Enabled
CHNG  NEXT
```

- 6 Press CHNG to change the status from enabled to disabled.

```
Status: Disabled
CHNG  NEXT
```

- 7 The display shows that the skillset is disabled.

- 8 Press **[END]** to end the session.

Changing skillset properties

You cannot change the properties of a skillset while it is enabled. You must disable the skillset. If you want to change the CDN, disable the skillset and wait until there are no calls in the skillset before you change the CDN.

To change a skillset

```
Log:
QUIT  RETRY  OK
```

- 1 Press **9 8 3**.
Enter the Call Center Administrator Mailbox number and password, and then press **OK**.

```
Admin
MBOX  AA  OTHR
```

- 2 Press **OTHR**.

```
Admin
GLIST  CCR  CC
```

- 3 Press **CC**.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press **SKILL**.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to change and press **OK**.

```
Status: xxxxxxx
CHNG  NEXT
```

- 6 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable the skillset Press **CHNG** and press **NEXT** to continue.

```
Skillset Admin
PARAM  AGENT  ROUTE
```

- 7 Press **PARAM**.

```
<xxxxxxxx>
CHNG  NEXT
```

- 8 Press **CHNG** if you want to change the name of the skillset or press **NEXT** and go to step 11.

```
Skillset name:
RETRY  BKSP  OK
```

- 9 Enter the new skillset name and press **OK**.
For how to enter characters on the dialpad, refer to [“Using the dialpad” on page 16](#).

```
<xxxxxxxx>
CHNG  NEXT
```

- 10 Press **NEXT**.

```
CDN: <xxx>
CHNG  NEXT
```

- 11 The skillset’s CDN is displayed. Press **CHNG** to change the CDN or press **NEXT** and go to step 14.

```
CDN:
RETRY  OK
```

- 12 Enter the CDN and press **OK**.

```
CDN: <xxx>
CHNG  NEXT
```

- 13 Press **NEXT**.

MWI ext: <none>
CHNG NEXT

- 14** Press CHNG to assign or change an MWI ext or press NEXT to accept the default of no MWI and go to step 17.

Ext:
RETRY OK

- 15** Enter the extension for MWI and press OK.

MWI ext: <xxx>
CHNG NEXT

- 16** Press NEXT.

Method: xxxxx
CHNG NEXT

- 17** Press CHNG to change the method of call distribution or press NEXT.

Break: xx:xx
CHNG NEXT

- 18** Press CHNG to change the Break time or press NEXT and go to step 21.

Break: mms:
RETRY OK

- 19** Enter the Break time and press OK. This is a four digit field. Add a zero to any single digit hour or minute.

Delay ans: xx:xx
CHNG NEXT

- 20** Press CHNG to change the Delay Answer time or press NEXT and go to step 24.

Delay ans mms:
RETRY OK

- 21** Enter the Delay answer time and press OK. This is a four digit field. Add a zero to any single digit hour or minute.

Delay ans: xx:xx
CHNG NEXT

- 22** Press NEXT.

Atdt: (xxxx)
CHNG NEXT

- 23** The display shows whether the skillset has an attendant extension assigned. Press CHNG to change the attendant extension or press NEXT and go to step 27.

Ext:
RETRY QUIT

- 24** Enter the attendant extension.

Atdt: xx
CHNG NEXT

- 25** Press NEXT.

Prompt lang: xxx
CHNG NEXT

- 26** Press CHNG to change the prompt language or press NEXT.

```
AC Entry: OPT
OPT  PRMPT  NEXT
```

27 Press NEXT if your Call Center does not use Activity Codes or if you do not want to change the Activity Code entry type and go to step 28
or
if your Call Center uses Activity Codes, select the Activity Code entry type: OPT for Optional, PRMPT for Prompted and press NEXT. This prompt appears only if you have Call Center Reporting enabled on your system.

NOTE: Although you can set this Activity Code parameter by telephone, you must use CallPilot Manager to create Activity Codes. For more information, refer to the *Call Center Set Up and Operation Guide* or CallPilot Manager online help.

```
EWT sample: 10
CHNG  NEXT
```

28 If you use Expected Wait Time, enter how many calls you want to use to calculate ETW. The range is 2-256 calls. The default is 10.

If you do not use Expected Wait Time, go so step 31.

```
EWT allow incr: Y
CHNG  NEXT
```

29 If you use Expected Wait Time, select whether you want EWT to be recalculated if it increases, and the appropriate EWT greeting to be played. The default is Y.
If you do not want to change this setting

```
EWT ICD: hh:mm:ss
CHNG  NEXT
```

30 If you use Expected Wait Time, enter the Initial Call Duration. This can be a value between 00:01:00 and 24:00:00, and is used to compute expected wait time until sufficient statistics are obtained.

```
Mo: 24 hour
CHNG  NEXT
```

31 The display shows the Monday Routing Table method. In this example the Routing Table is in 24 hour mode. Press CHNG to change the Routing Table method
or
press NEXT and go to step 33.

```
Day start: hhmm
RETRY  OK
```

32 Enter the Day Routing Table start time and press OK. This is a four digit field. Add a zero to any single digit hour or minute.

```
Day hhmm: xxxx
RETRY  AM  PM
```

33 Press AM or PM.

```
Night start: hhmm
RETRY  OK
```

34 Enter the Night Routing Table start time and press OK. This is a four digit field. Add a zero to any single digit hour or minute.

```
Night hhmm: xxxx
RETRY  AM  PM
```

35 Press AM or PM.

```
Mo: xxxxa-xxxxP
CHNG 24HR NEXT
```

- 36** The display shows the Monday Routing Table start times. Press CHNG to change the start times and follow steps 31 through 34
or
press 24HR to use 24 hour service for Monday
or
press NEXT to continue.

```
Tu: xxxxa-xxxxP
CHNG 24HR NEXT
```


- 37** The display shows the Tuesday Routing Table method. In this example the Routing Table has Day and Night Routing Table start times programmed.

```
Tu: xxxxa-xxxxP
CHNG 24HR NEXT
```

- 38** Press CHNG to change Day or Night Routing Table start times
or
press 24HR to use 24 Hour mode for Tuesday
or
press NEXT to continue.

```
Mo: 24 hour
CHNG NEXT
```

- 39** The display shows the Wednesday Routing Table method. Continue to change the Routing Tables start times for each day of the week.

- 40** Press  to end the session.

Unconfiguring a skillset

If you unconfigure a skillset, you erase the programming for the skillset. You can then reprogram the skillset.

When you unconfigure a skillset, the system:

- erases the skillset Routing Table
- unassigns the skillset agents
- erases the skillset mailbox and all the messages in it
- makes the CDN available so it can be used by another skillset or device

To unconfigure a skillset you must:

- 1 First disable the skillset and wait until all the calls are distributed. See [“Disabling a skillset” on page 48](#).
- 2 Unassign the lines assigned to the skillset. See [“To configure lines for Call Center” on page 30](#).
- 3 Follow the procedure below to unconfigure the skillset.

```
Log9:
QUIT  RETRY  OK
```

- 1 Press 9 8 3 .
Enter the Call Center Administrator Mailbox number and password, and then press OK.

```
Admin
MBOX  AA  OTHR
```

- 2 Press OTHR.

```
Admin
GLIST  CCR  CC
```

- 3 Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press SKILL.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to change and press OK.

```
Status:xxxxxxx
CHNG  NEXT
```

- 6 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable the skillset Press CHNG and press NEXT to continue.

```
Skill mbox pswd
RESET  NEXT
```

- 7 Press NEXT to continue.

```
Skillset Admin
PARM  AGENT  OTHR
```

- 8 Press OTHR.

```
Skillset Admin
ROUTE  OVFLW  UNCF
```

- 9 Press UNCF.


```
Unconfigure?
YES  NO
```

- 10 Press YES to unconfigure the skillset.

```
Skillset
Unconfigured
```

11 This display appears momentarily.

```
CC Admin
AGENT SKILL OTHR
```

12 Press  to end the session.

Chapter 6

Setting up skillset mailboxes

About skillset mailboxes

Each skillset has a mailbox that stores messages left by callers. A skillset mailbox is created automatically when you set up a skillset. There is one skillset mailbox for each skillset. The skillset mailbox number is the same as the Control Directory Number (CDN) of the skillset.

Skillset mailboxes have these Class of Service settings:

- use the primary prompt language
- maximum message time is 15 minutes
- maximum message length is three minutes
- maximum message retention is 30 days
- maximum greeting length of one minute
- Off-premise message notification enabled with a retry interval of five minutes and three attempts
- Outbound Transfer is enabled
- maximum number of incorrect password attempts is nine
- password expires in 90 days
- Networking is enabled if you have the Message Networking option enabled
- Personal Target Attendant is enabled
- Record Call is not enabled
- prompt language is Primary
- user interface is Norstar Voice Mail

The default Class of Service for skillset mailboxes is 1.

To prepare a skillset mailbox to receive messages:

- Know the skillset mailbox number (CDN) of each skillset mailbox.
If you do not know the skillset mailbox number, refer to [“Determining a skillset mailbox number” on page 56](#)
- Initialize the skillset mailbox. Refer to [“Initializing a skillset mailbox” on page 58](#).
- Record the skillset mailbox greetings. Refer to [“Recording skillset mailbox greetings” on page 63](#).

You can use the table [“Skillset mailboxes” on page 177](#) to record the skillset mailboxes you set up.

Determining a skillset mailbox number

You must know a skillset mailbox number before you can set up the skillset mailbox. The skillset mailbox number is the mailbox's Control DN. If you know the skillset mailbox number, you can initialize the mailbox. Refer to [“Initializing a skillset mailbox” on page 58](#).

To determine a skillset's mailbox number and Message Waiting Indication telephone

- 1 Press .

- 2 Press NEXT.

Set xxxx
NEXT

- 3 The skillset mailbox number for skillset 1 is displayed. If None appears the skillset is not configured. Press NEXT to continue.

CDN 1: xx
 GOTO SKILL NEXT

- 4 The Message Waiting Indication (MWI) extension is displayed. If there are messages in the skillset 1 mailbox, MWI appears at this extension. You assign the MWI extension when you set up the skillset. If Unavail appears you have not set up an MWI extension.

Ext 1: xx
 GOTO SKILL NEXT

- 5 Press NEXT to view the skillset mailbox number and MWI extension for the next skillset
or
press GOTO to view another skillset and enter the skillset number.

- 6 Press to end the session.

While you use you can:

- press for GOTO to enter the number of the skillset you want to monitor
- press for SKILL to monitor the next enabled skillset
- press or for NEXT
- press for PREV to go to previous menu
- press to go to the next menu
- press to cancel the session

Checking which telephone mailbox interface you use

CallPilot supports two interfaces: Norstar Voice Mail and CallPilot.





The Call Center Administrator determines which interface is assigned to the mailbox.

For how to change your mailbox interface refer to:

- the CallPilot Manager Set Up and Operation Guide for how to change your interface using CallPilot Manager
- the CallPilot Telephone Administration Guide for how to change your interface using a telephone

Follow the procedures that apply to the interface you use.

Some procedures apply to both interfaces.

1. Press    .

Follow the voice prompts or the display button options to open your mailbox.


2. Check the display to see which interface you use:

```
0 new 0 saved
PLAY REC ADMIN
```

This is the Norstar Voice Mail interface.

```
No messages
COMP MBOX EXIT
```

This is the CallPilot interface.

3. Press  to end the session.

Initializing a skillset mailbox

You must initialize a skillset mailbox before you can retrieve or listen to messages that are left in it, and before you can enable its skillset.

Choose a password for the skillset mailbox that is between four to eight digits long and does not start with zero. Give the skillset mailbox passwords to the agents who are responsible for retrieving messages.

Initializing a skillset mailbox involves:

- choosing a password from four to eight digits long that does not start with zero
- changing the skillset mailbox default password to the new password
- recording the skillset mailbox name in the Company Directory

To initialize a skillset mailbox

- 1 Press .
- 2 Log on by following the voice prompts.
Use the skillset mailbox number and , the default password.
- 3 This display appears briefly to indicate that you must change the password.

Must change pswd
- 4 Enter a new skillset mailbox password from four to eight digits long that does not start with zero.
Press OK or .

Pswd:
RETRY OK
- 5 Reenter the skillset mailbox password and press OK or .

Again:
RETRY OK
- 6 At the tone, record the skillset mailbox name in the Company Directory. Do not use handsfree.
Include the skillset mailbox number in the recording. For example, "Sales, mailbox 5813."
Press OK or to end the recording.

Record name:
RETRY OK
- 7 Press OK or to accept the recording
or
press PLAY or to listen to the recording
or
press RETRY or to re-record your name.

Accept name?
RETRY PLAY OK
- 8 The recorded name plays and the skillset mailbox name is displayed.
The skillset mailbox name is the name you entered when you set up the skillset properties.

<Skillset name>
- 9 Press to end the session.

Opening a skillset mailbox

You can open an initialized skillset mailbox from:

- your extension
- another extension
- an outside tone dial telephone

To open a skillset mailbox - Norstar Voice Mail

1. Press **[*] 9 8 1**.

```
Pswd:
OTHR  RETRY  OK
```

2. Enter the skillset mailbox password and press **OK** or **#** or
if you are at another extension, or if you are using a Guest mailbox, press **OTHR** or ***** to display the **LOG:** prompt. When this prompt appears, enter the skillset mailbox number and password.

```
1 new 1 saved
PLAY  REC  ADMIN
```

3. After you open the skillset mailbox, the telephone display shows how many new and saved messages are in the mailbox.

To open a skillset mailbox - CallPilot

1. Press **[*] 9 8 1**.

```
Mbox:
RETRY  OK
```

2. Press **#** or
if you are at another extension, enter the skillset mailbox number and then press **OK** or **#**.

```
Pswd:
RETRY  OK
```

3. Enter the skillset mailbox password and press **OK** or **#**.

Opening a skillset mailbox remotely

To open a skillset mailbox from an outside telephone

- If a skillset mailbox is a Mailbox node in a CCR Tree, enter the digits and you automatically transfer to the skillset mailbox
or
- Call an Operator, receptionist or subscriber and ask them to transfer you to the skillset mailbox number using **☎ 9 8 6**.
- After you reach the skillset mailbox, press *** *** during the greeting to open the skillset mailbox. If you are in Europe or Australia press **8 8**.
- At the voice prompt, enter the skillset mailbox number and password and press **#**. Follow the voice prompts.

To open a skillset mailbox directly from an outside telephone

Follow either procedure to open a skillset mailbox remotely.

- 1 Call a telephone line that is answered by the Automated Attendant.
- 2 Press *** *** during the Automated Attendant Menu prompt.
If you are in Europe or Australia press **8 8**.
- 3 Enter the skillset mailbox number and password, and then press **#**.
- 4 Follow the voice prompts.

or

- 1 Call your extension number.
- 2 Press *** *** during your personal greeting.
If you are in Europe or Australia press **8 8**.
- 3 Enter the skillset mailbox number and password, and then press **#**.
- 4 Follow the voice prompts.

Skillset mailbox password

To decrease the chances of unauthorized access to a skillset mailbox, change its password regularly, we suggest every 30 days.

Keep a written copy of the skillset mailbox passwords in “Skillset mailboxes” on page 177. Give the skillset mailbox passwords only to the agents who retrieve messages at your call center. For security reasons, choose an uncommon password, not a predictable password like 1234 or 1111. If someone knows a skillset mailbox password, they can access the skillset mailbox and play or delete messages. They can also access CallPilot and use it fraudulently or disrupt service.

Changing a skillset mailbox password

You can change a skillset mailbox password at any time. A password must be from four to eight digits long and cannot start with zero.

To change a skillset mailbox password

- 1 Press **[*]** **[9]** **[8]** **[1]**.
Follow the voice prompts or the display buttons to open the skillset mailbox.

<Skillset name>

- 2 The skillset mailbox name appears briefly and the recorded name plays.
- 3 If you use the CallPilot interface:
 - Press **[8]** **[4]** to open the Mailbox Password menu
 - Go to step 4

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **PSWD** or **[4]**
- Go to step 4

Pswd:
RETRY OK

- 4 Enter your new mailbox password and press **OK** or **[#]**.

Again:
RETRY OK

- 5 Re-enter your new mailbox password and press **OK** or **[#]**.

Password OK

- 6 This display appears briefly.

- 7 Press **[*]** to end the session.

Resetting a skillset mailbox password

You must disable the skillset before you reset the password.



Note: Reset a password if the agent who accesses the skillset mailbox forgets the password or is “locked-out”. The password for the reset mailbox is 0000. The agent who accesses the skillset mailbox cannot retrieve messages until they create a new password. Tell the agent to change the default password as soon as possible. While the skillset mailbox has the default password, the mailbox is vulnerable to unauthorized access.

To reset a skillset mailbox password

```
Log:
QUIT  RETRY  OK
```

- 1 Press **[9] [8] [3]**.
Enter the Call Center Administrator Mailbox number and password, and then press **OK**.

```
Admin
MBOX  AA  OTHR
```

- 2 Press **OTHR**.

```
Admin
GLIST  CCR  CC
```

- 3 Press **CC**.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press **SKILL**.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset whose mailbox password you want to reset and press **OK**.

```
Status: xxxxxxxx
CHNG  NEXT
```

- 6 The display shows whether the skillset is enabled or disabled. Press **NEXT** if the skillset is disabled or press **CHNG** and then press next if the skillset is enabled.

```
Skillset Admin
PARAM  AGENT  ROUTE
```

- 7 Press **PARAM**.

```
<xxxxxxxx>
CHNG  NEXT
```

- 8 The display shows the name of the skillset mailbox. Press **NEXT**.

```
CDN: <xxx>
CHNG  NEXT
```

- 9 The display shows the CDN of the skillset mailbox. Press **NEXT**.

```
MWI ext: <none>
CHNG  NEXT
```

- 10 Press **NEXT**.

```
Password
RESET  NEXT
```

- 11 Press **RESET** to reset the password for the skillset mailbox. The password is reset to 0000.

```
Password reset
```

- 12 This display appears briefly.

- 13 Press **[END]** to end the session.

Recording skillset mailbox greetings

After you initialize a skillset mailbox, record the greetings for it.

You can record Primary, Alternate and Personalized greetings for each skillset mailbox. You record a Primary skillset mailbox greeting for everyday use. The Alternate skillset mailbox greeting is an optional greeting you can record for special circumstances. If your call center subscribes to Caller ID, you can record Personalized skillset mailbox greetings.

If you record Primary and Alternate skillset mailbox greetings, you must choose which greeting plays to callers who reach the skillset mailbox.

You can also record greetings in an Alternate Language. Callers can press **9** while the greeting is playing to listen to the voice prompts in the Alternate Language. Remember to inform callers in the Primary skillset mailbox greeting that they can press **9** to hear the Alternate Language.

If the Operator Status is set to Yes, and a caller presses **0** during the skillset mailbox greeting, the caller transfers to the receptionist or Operator. For information about Operator Status, refer to the *CallPilot Manager Set Up and Operation Guide*. Inform callers in the skillset mailbox greetings that they can press **0** to speak to the receptionist or Operator.

If the Operator Status is set to No, a caller who presses **0** during the skillset mailbox greeting is informed the Operator is not available, and is transferred to the skillset mailbox.

Examples of Primary and Alternate greetings

You must record a Primary greeting for each skillset mailbox. In the Primary greeting include the skillset mailbox name that is listed in the Company Directory. For example:

“Hello. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, telephone number and a brief message. One of our agents will return your call as soon as possible. Thank you.”

You can record an Alternate greeting for each skillset mailbox. Use an Alternate greeting for special circumstances. In the Alternate skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory.

For example:

“Season’s Greetings! You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, telephone number and a brief message. One of our agents will return your call when we re-open on December 27. Thank you.”

To record a Primary or Alternate skillset mailbox greeting

- 1 Press **[*]** **[9]** **[8]** **[1]**.
Follow the voice prompts or the display button options to open the skillset mailbox.

```
<Skillset name>
```

- 2 The skillset mailbox name appears briefly.

- 3 If you use the CallPilot interface:
 - Press **[8]** **[2]** to open the Greetings Options menu
 - Go to step 4

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **GREET** or **[2]**
- Go to step 4

```
Greeting options
REC  CHOOSE  CFWD
```

- 4 Press **REC** or **[1]**.

```
Greeting:
PRIME  ALT  PERS
```

- 5 Press **PRIME** or **[1]** to record the Primary greeting or press **ALT** or **[2]** to record the Alternate greeting. If you are changing a greeting, the current greeting starts to play.

```
Not recorded
```

- 6 If this is the first time you are recording a greeting, this display appears briefly.

```
Record new?
YES  NO  QUIT
```

- 7 Press **YES** or **[1]** and record your greeting at the tone.

```
Record greeting:
RETRY  OK
```

- 8 Press **OK** or **[#]** to end the recording.

```
Accept greeting?
RETRY  PLAY  OK
```

- 9 Press **OK** or **[#]** to accept the recording or press **PLAY** or **[1]** to listen to the greeting or press **RETRY** or **[2]** to rerecord the greeting.

- 10 Press **[*]** to end the session.

Choosing a Primary or Alternate skillset mailbox greeting

If you record a Primary and an Alternate skillset mailbox greeting, you must choose which greeting plays. You can change the selection at any time and as often as needed. If you do not choose a greeting, the Primary skillset mailbox greeting plays.

If you choose the Alternate mailbox greeting, you must set whether the mailbox accepts messages. If you choose Yes the skillset mailbox receives messages in the normal way.

If you choose No:

- messages cannot be left in the skillset mailbox
- the Alternate mailbox greeting takes precedence over all other greetings
- if a caller presses a button to fast forward the message, they hear a voice prompt that says this is a special greeting
- if a caller presses a button to send a fax, the fax goes to the General Delivery Mailbox, not the skillset mailbox.

If you choose the Alternate mailbox greeting, remember to change back to the Primary mailbox greeting at the appropriate time.

To choose a Primary or Alternate skillset mailbox greeting

- 1 Press **☰** **9** **8** **1**.

Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

```
<Skillset name>
```

- 2 The skillset mailbox name appears briefly.

- 3 If you use the CallPilot interface:

- Press **8** **2** to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **GREET** or **2**
- Go to step 4

```
Greeting options
REC  CHOOSE  CFWD
```

- 4 Press **CHOOSE** or **2** to select a greeting.

```
Use greeting:
PRIME  ALT  QUIT
```

- 5 Press **PRIME** or **1** to select the Primary mailbox greeting and go to step 7
or
press **ALT** or **2** to select the Alternate mailbox greeting and go to step 6.

Accept msgs:Y
CHNG OK

- 6** If you choose the Alternate mailbox greeting, you are asked whether the mailbox can accept messages. Press **CHNG** or **1** to toggle from yes to no or press **OK** or **#** to accept.
- 7** Press **END** to end the session.

Recording a Personalized skillset mailbox greeting

If your call center subscribes to Caller ID, you can record a maximum of three Personalized greetings for each skillset mailbox. For Personalized skillset mailbox greetings, you program Call Center to recognize a specific telephone number. The Personalized skillset mailbox greeting plays only for a call from the specific telephone number.

If you record a Personalized greeting, program the skillset mailbox to receive messages and choose an Alternate mailbox greeting, the Personalized greeting takes precedence over any other greetings. If you program the skillset mailbox not to receive messages and choose an Alternate mailbox greeting, the Alternate mailbox greeting takes precedence over any other greeting, including Personalized mailbox greetings.

In the Personalized skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory. For example:

“Hi John. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your order. One of our agents will return your call if you need to speak to someone directly. Thank you.”

To record a Personalized skillset mailbox greeting

- 1 Press **☛** **9** **8** **1**.

Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.

```
<Skillset name>
```

- 2 The skillset mailbox name appears briefly.

- 3 If you use the CallPilot interface:

- Press **8** **2** to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **GREET** or **2**
- Go to step 4

```
Greeting options
REC  CHOOSE  CFWD
```

- 4 Press **REC** or **1**.

```
Greeting:
PRIME  ALT  PERS
```

- 5 Press **PERS** or **3** to record a Personalized greeting.

```
Greeting:
RETRY  OK
```

- 6 Enter a Personalized greeting number of 1, 2 or 3.

```
Ph:
CHNG  OK
```

- 7 Press **CHNG** or **1**.

```
Ph: <xxxxxxxx>
RETRY      OK
```

- 8** Enter the telephone number (maximum 10 digits) that you are assigning the Personalized mailbox greeting to. Press **OK** or **#** to accept the telephone number.

```
Record greeting:
RETRY      OK
```

- 9** Lift your handset. At the tone, record your greeting. Press **OK** or **#** to end the recording.

```
Accept greeting?
RETRY  PLAY  OK
```

- 10** Press **OK** or **#** to accept the greeting, or press **PLAY** or **1** to listen to the greeting or press **RETRY** or **2** to re-record the greeting.

- 11** Press **[End Call]** to end the session.

Deleting a Personalized mailbox greeting

If you no longer need a Personalized mailbox greeting, you can delete it.

- 1** Press **[Exit] 9 8 1**. Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.

```
<Skillset name>
```

- 2** The skillset mailbox name appears briefly.

- 3** If you use the CallPilot interface:

- Press **8 2** to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **GREET** or **2**
- Go to step 4

```
Greeting options
REC  CHOOSE  CFWD
```

- 4** Press **REC** or **1**.

```
Greeting:
PRIME  ALT  PERS
```

- 5** Press **PERS** or **3** to choose a Personalized mailbox greeting.

```
Greeting:
RETRY      OK
```

- 6** Enter the Personalized greeting number that you want to delete.

```
Ph: XXXXXXXX
CHNG  DEL  OK
```

- 7** Press **DEL** or **2** to delete the greeting.

- 8** Press **[End Call]** to end the session.

Checking skillset mailboxes for messages

Frequently check the skillset mailboxes for messages. Only one agent can retrieve messages from each skillset mailbox at a time.

If different agents access the messages in the skillset mailbox throughout the day, each agent should:

- listen to the message
- write down what the message says
- erase the message
- return the caller's telephone call

If the caller is not available, the agent can try again later or pass the message on to another agent.

If the agent who listens to the message erases the message after writing down what it says:

- the next agent does not waste time listening to the same message
- the next agent knows if the callback was successful or not
- only one agent contacts the caller

If only one agent is responsible for retrieving messages at your call center, this agent does not need to transcribe and delete each message before callback. This agent handles messages and knows the status of the old messages.

Playing skillset mailbox messages

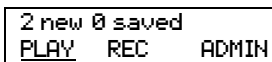
Use the procedure for playing messages that corresponds to the interface you use:

- “To play skillset mailbox messages - Norstar Voice Mail” on page 70
- “To play skillset mailbox messages - CallPilot” on page 72

To play skillset mailbox messages - Norstar Voice Mail

Use this procedure if you use the Norstar Voice Mail interface.

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.



- 2 Press **PLAY** or **[2]** to listen to your messages.
For other options, refer to the table “Playing skillset mailbox messages - Norstar Voice Mail” on page 70.
- 3 Press **[*]** to end the session.

The table “Playing skillset mailbox messages - Norstar Voice Mail” shows the message options available to you during and after playing messages.

| Option | Button | Available while playing | Available after playing | Description |
|----------------|--|-------------------------|-------------------------|---|
| Back up | [1] or <<< | ✓ | | Rewinds the message three seconds and resumes playing it. |
| Copy | [5] or COPY | ✓ | ✓ | Sends a copy of the message to one or more mailboxes. If you record an introduction, it must be longer than three seconds. |
| End of Message | [3] [3] or >>> >>> | ✓ | | Goes to the end of the message. |
| Envelope | [7] | ✓ | ✓ | Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender. |
| Erase | [8] or ERASE | ✓ | ✓ | Deletes the message currently playing. If no messages are playing, deletes the last message played. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes 1 and 2 on page 71 .) |

| Playing skillset mailbox messages - Norstar Voice Mail | | | | |
|--|---------------------------------------|-------------------------|-------------------------|---|
| Option | Button | Available while playing | Available after playing | Description |
| Forward | 3 or >>> | ✓ | | Advances the message three seconds and continues playing from that point. |
| Next | 6 or # # | ✓ | ✓ | Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox. |
| Pause/Continue | 2 or <u>STOP</u> <u>PLAY</u> | ✓ | | Temporarily stops a message. When you stop the message, you can play the previous message, continue playing the current message, or skip to the next message. |
| Previous | 4 | ✓ | ✓ | Stops playing the current message and plays the previous message. |
| Quit | * | | ✓ | Stops playing the message and plays the Mailbox main menu options. |
| Replay | 1 1 or <<< <<< | ✓ | | Replays the message from the beginning. |
| Replay | 1 | | ✓ | Replays the last message. |
| Reply | 9 or <u>REPLY</u> | ✓ | ✓ | Replies to a message. (Refer to Note 3 on page 72) The reply can be either: - a message to an internal sender's mailbox - a telephone call to an internal or external party (Refer to Note 4 on page 72 .) |
| Save Message | 7 7 or <u>SAVE</u> | ✓ | | Saves the message being played. (If you do not delete a message, it is automatically saved). This option is not shown on the display unless you erase a message. If you erase a message and play the message again, you can press <u>SAVE</u> on a two line display telephone. (Refer to Note 2 on page 71 .) |
| Volume Control | * | ✓ | | Adjusts the volume of the message that is playing. The volume increases each time you press *. After four presses, the volume returns to the lowest level. |

Notes:

- 1 Because the skillset mailbox has limited message storage space, delete any messages you no longer need. After a certain time period, your saved messages are erased automatically. Ask your System Administrator about this.
- 2 You can retrieve a deleted message only if you have not quit the session in which you deleted it. For information about retrieving deleted messages refer to [“Retrieving erased messages” on page 73](#)”.

- 3 Applies only if the Reply feature is enabled.
- 4 You can reply to an outside caller by dialing them back if your company subscribes to Caller ID (CLID) service. For further information about replying to an outside caller refer to [“Using the Reply feature to reply to an external caller”](#) on page 76.

To play skillset mailbox messages - CallPilot

Use this procedure if you use the CallPilot interface.

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

A voice prompt announces the number of new and saved messages that you have.

| |
|----------------|
| No messages |
| COMP MBOX EXIT |

- 2 You can play any message that you want to listen to.
Press **[2]** to play the current message.
For other message commands, refer to the table [“Playing skillset mailbox messages - CallPilot”](#).
- 3 Press **[*]** to end the session.

The table [“Playing skillset mailbox messages - CallPilot”](#) shows the message options that are available to you during and after playing messages.

| Playing skillset mailbox messages - CallPilot | | | |
|---|----------------|------------------------------------|--|
| Option | Button | Available during and after playing | Description |
| Skip Back | [1] | | Rewinds the message five seconds and resumes playing it at that point. |
| Skip Forward | [3] | | Advances the message five seconds and continues playing from that point. |
| Previous Message | [4] | | Stops playing the current message and plays the previous message. |
| Next Message | [6] | | Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox. |
| Call Sender | [9] | | Places a call to the sender of a message. |
| Help | [*] | ✓ | Offers a Help menu. |
| Reply | [7] [1] | ✓ | Replies to a message. |

| Playing skillset mailbox messages - CallPilot | | | |
|---|--------|------------------------------------|--|
| Option | Button | Available during and after playing | Description |
| Envelope | 7 2 | ✓ | Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender. |
| Forward Message | 7 3 | ✓ | Forwards the message to one or more mailboxes. You can record an introduction to the forwarded message. |
| Reply All | 7 4 | ✓ | Replies to a message and all recipients of the message. (Refer to Note 3 on page 72 .) |
| Delete | 7 6 | ✓ | Deletes the current message. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes 1 and 2 on page 71 .) |

Retrieving erased messages

After you play your messages and end your skillset mailbox session, any messages that you do not erase are saved. Since message storage space is limited, we recommend that you erase messages that are no longer needed.

You can retrieve an erased message if you are still in the skillset mailbox session. An erased message remains in the skillset mailbox until you end the current session.

To retrieve an erased message - Norstar Voice Mail

After you erase a new or saved message, the number of new or saved messages shown on the display is decreased by one. Even though the display shows 0 new 0 saved, you can still play and retrieve any erased skillset mailbox messages. Press **PLAY** or 2 to listen to the erased message.

To retrieve an erased message - CallPilot

You can retrieve a deleted message. A deleted message remains in the skillset mailbox until you end the current session. Locate the deleted message. Then press 7 6 to restore the message.

After you play the erased message, you can restore it. If you end the current session without restoring the erased message, it is permanently erased from the skillset mailbox.

Replying to messages

You can reply to internal and external callers. You can reply to an external caller if your company subscribes to CLID.

The messages you record must be longer than three seconds. The system times out after five seconds of silence.

Use the procedure for replying to messages that applies to the interface you use:

- “To reply to an internal caller - Norstar Voice Mail” on page 74
- “To reply to an internal caller - CallPilot” on page 75

Replying to an internal caller

| If you use | and you want to | use |
|--------------------|---|---|
| Norstar Voice Mail | reply to the caller's extension | <u>CALL</u> to transfer to the internal caller's extension. |
| | leave a message in the caller's mailbox | <u>MSG</u> to record and send a reply to the internal caller's mailbox. |
| CallPilot | reply to the caller's extension | <u>Call Sender</u> 9 to transfer to the internal caller's extension. |
| | leave a message in the caller's mailbox | <u>Reply</u> 7 1 to record and send a reply to the internal caller's mailbox. |

To reply to an internal caller - Norstar Voice Mail

- 1 Press **9** **8** **1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

```
1 new 0 saved
PLAY REC ADMIN
```

- 2 Press PLAY or **2**.

```
End of message
REPLY ERASE NEXT
```

- 3 After you listen to the message, press REPLY or **9**.

```
Reply to msg
MSG CALL QUIT
```

- 4 Press CALL or **2** to call the caller
or
press MSG or **1** to record and send a reply.

To reply to an internal caller - CallPilot

- 1** Press .
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.
- 2** A mailbox summary is announced.
While you are in your message list, you can play any message.
- 3** Press to play the current message.
- 4** Press to call the caller
or
press to record and send a reply.

Using the Reply feature to reply to an external caller

You can reply to an external caller using the Reply feature if your company subscribes to a Caller ID service and the skillset mailbox has an outdial method assigned to it. For how to assign an outdial method to a skillset mailbox refer to [“Assigning an outdial method to a skillset mailbox” on page 78](#). Before you use the Reply feature you must play the message.

To reply to an external caller - Norstar Voice Mail

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

```
1 new 0 saved
PLAY REC ADMIN
```

- 2 Press **PLAY** or **[2]**.

```
End of message
REPLY ERASE NEXT
```

- 3 After you listen to the message, press **REPLY** or **[9]**.
CallPilot dials the external number directly.

To reply to an external caller - CallPilot

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.
- 2 A mailbox summary is announced.
While you are in the message list you can play any message.
- 3 Press **[2]** to play the current message.
- 4 Press **[9]** to call the caller.
CallPilot dials the external number directly.

Chapter 7

Off-premise Message Notification

About Off-premise Message Notification

Off-premise Message Notification notifies you or a designated agent when there are new or urgent messages in a skillset mailbox. You can receive Off-premise Message Notification at any tone dial telephone number, pager or extension.



Note: Set up Off-premise Message Notification for non-business hours. Then Off-Premise Message Notification does not consume a Reserved or voice channel during busy periods.

You can receive notification of a message at a maximum of five different destination numbers. When the number of retry attempts is reached for each destination number, the next number in the series is called. For example, Call Center can call your car telephone first when there is a message in the skillset mailbox. If there is no answer, Call Center waits five minutes and calls your car telephone again. If there is still no answer, Call Center calls your car telephone a third time. If there is no answer after three calls, Call Center calls your home telephone. Call Center continues to call at five minute intervals until the call is answered or all of the destinations are called three times.

Off-premise Message Notification, the Retry Intervals and Maximum Number of Attempts for skillset mailboxes are assigned through the Class of Service settings in CallPilot Manager. Skillset mailboxes have a default Class of Service of 1.

Class of Service 1 has these default settings for Off-premise Message Notification:

- Off-premise Message Notification enabled
- a Retry Interval of five minutes
- a Maximum Number of Attempts of 3

For information about changing Class of Service settings, refer to the *CallPilot Manager Set Up and Operation Guide*.

You must assign start and stop times for telephone and destinations. Off-premise Message Notification begins when the start time is reached. Set the start time for a time when you are at the destination number so that you are there to receive calls.

A person who receives an Off-premise Message Notification call can cancel Off-premise Message Notification to their destination number. This is useful if a destination is incorrectly programmed and a wrong party receives the calls.

The recipient of an Off-premise Message Notification call hears the following voice prompt: “Message for (name of mailbox owner). To log on press **1**. If you have received this call by mistake, please press **2**.”

After you set the Off-premise Message Notification parameters, Off-premise Message Notification is enabled automatically.

Assigning an outdial method to a skillset mailbox

The outdial method determines which line, line pool or route code the system uses for Off-premise Message Notification. The default for outdial method is None. You must assign an outdial method before you can use an external telephone or a pager as an Off-premise Message Notification destination.

For more information on line pools and route codes, refer to your system documentation.



Warning: Do not change the extension number assigned to the skillset mailbox. If this extension number is changed, callers in the skillset cannot access the skillset mailbox and you cannot change the Skillset general parameters. To correct a wrong extension number, change the extension number to the Control DN of the skillset.

To assign an outdial method to a skillset mailbox

```
Log:
QUIT  RETRY  OK
```

- 1 Press **[6] [9] [8] [3]**.
Enter the Call Center Administrator mailbox number and password, and then press **OK**.

```
Admin
MBOX  AA  OTHR
```

- 2 Press **MBOX**.

```
Mailbox Admin
ADD  DEL  CHNG
```

- 3 Press **CHNG**.

```
Mbox:
DIR  QUIT
```

- 4 Enter the skillset mailbox number or press **DIR** to use the Company Directory.

```
Outdial: <none>
CHNG  NEXT
```

- 5 Press **NEXT** until you see this display.
Press **CHNG**.

```
Outdial: <line>
CHNG  NEXT
```

- 6 Press **NEXT** if you want to use a line as the outdial method or
press **CHNG** if you want to use a line pool as the outdial method and then press **NEXT**.

```
xxxx:
RETRY  OK
```

- 7 Enter the Line or Pool number and press **OK**.
Line numbers must be between 1 and 500. Although line pools have a letter such as A, B or C, Call Center accepts only numbers. If you enter a line pool use 1 for A, 2 for B, 3 for C, and so on.

```
Accept: x
RETRY  OK
```

- 8 Press **OK**.

- 9 Press **[Phone]** to end the session.

Off-premise Message Notification parameters

You can set up the parameters for Off-premise Message Notification from any tone dial telephone.

The parameters are:

- destination type (phone, extension or pager)
- destination number (phone, extension or pager)
- time range for receiving calls at telephone numbers or extensions (Pagers are notified any time there is a qualifying message.)
- types of message you want to receive (all new messages or just urgent messages)



Note: The restrictions that apply to your telephone line also apply to Off-premise Message Notification numbers. For example, if you cannot dial long distance telephone numbers from your telephone, you cannot have a long distance Off-premise Message Notification destination number.

Setting up Off-premise Message Notification

Follow these instructions if you have not set up Off-Premise Message Notification and are setting it up for the first time. If you have set up Off-Premise Message Notification, refer to the section on [“Changing Off-premise Message Notification” on page 89](#).

| To set up Off-premise Message Notification to | refer to |
|---|-------------------------|
| a telephone number | page 80 |
| an extension | page 82 |
| a pager | page 84 |

To set up Off-premise Message Notification to a telephone number

- 1 Press **6** **9** **8** **1** .
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **8** **5** to open the Mailbox Tools
- Press **NOTIF** or **2** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **6** to open the Off-premise Message Notification menu
- Go to step 3

```
Ms9 notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **1** to set up Off-premise Message Notification.

```
Destination:
PHONE EXT PAGER
```

- 4 Press **PHONE** or **1** to choose a telephone number destination.

```
Ph:
RETRY OK
```

- 5 Enter the destination telephone number and press **OK** or **#** . The destination telephone number is a maximum of 30 digits.

```
<x>
ADD OK
```

- 6 Press **OK** or **#** to accept the destination telephone number represented by <x>
or
press **ADD** or **2** to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press **OK** or **#** to accept the destination number.

```
Start hhmm:
RETRY OK
```

- 7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.

```
<start time>
RETRY AM PM
```

- 8 Press **AM** or **1**
or
PM or **2** .


```
<start time>
RETRY      OK
```

9 Press OK or # to accept the start time.

```
Stop h:mm:
RETRY      OK
```

10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.

```
<stop time>
RETRY      AM      PM
```

11 Press AM or 1
or
PM or 2.

```
<stop time>
RETRY      OK
```

12 Press OK or # to accept the stop time.

```
More dest?
YES      NO
```

13 Press YES or 1 if you want to set up another destination number or press NO or # if you do not want to set up another destination number.

```
Start:<start time>
CHNG      NEXT
```

14 Press NEXT or # to accept the start time that you entered or press CHNG or 1 to change the start time.

```
Stop:<stop time>
CHNG      NEXT
```

15 Press NEXT or # to accept the stop time that you entered or press CHNG or 1 to change the stop time.

```
Msg type: new
CHNG      OK
```

16 Press OK or # if you want to be notified when the skillset mailbox receives a new message or press CHNG or 1 if you want to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN     SELECT
```

17 Press  to end the session.

To set up Off-premise Message Notification to an extension

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN      SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Destination:
PHONE EXT  PAGER
```

- 4 Press **EXT** or **[2]** to choose an extension as the destination.

```
Ext:
RETRY      OK
```

- 5 Enter the destination number and press **OK** or **[#]**.

```
Accept:<x>
RETRY      OK
```

- 6 Press **OK** or **[#]** to accept the destination extension.
The <x> represents the extension.

```
Start hhmm:
RETRY      OK
```

- 7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by zero.

```
<start time>
RETRY      AM      PM
```

- 8 Press **AM** or **[1]**
or
PM or **[2]**.

```
<start time>
RETRY      OK
```

- 9 Press **OK** or **[#]** to accept the start time.

```
Stop hhmm:
RETRY      OK
```

- 10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.

```
<stop time>
RETRY  AM    PM
```

- 11** Press AM or **1**
or
PM or **2**.

```
<stop time>
RETRY          OK
```

- 12** Press OK or **#** to accept the stop time.

```
More dest?
YES    NO
```

- 13** Press YES or **1** if you want to set up another destination number
or
press NO or **#** if you do not want to set up another destination
number.

```
Start:<start time>
CHNG          NEXT
```

- 14** Press NEXT or **#** to accept the start time that you entered
or
press CHNG or **1** to change the start time.


```
Stop:<stop time>
CHNG          NEXT
```

- 15** Press NEXT or **#** to accept the stop time that you entered
or
press CHNG or **1** to change the stop time.

```
Msg type: new
CHNG          OK
```

- 16** Press OK or **#** if you want to be notified when the skillset mailbox
receives a new message
or
press CHNG or **1** if you want to be notified only when the skillset
mailbox receives an urgent message.

```
Msg notify
ADMIN  SELECT
```

- 17** Press  to end the session.

About setting up Off-premise Message Notification to a pager number

Example of a destination pager number

If you are assigning a pager destination number from behind a PBX, remember to insert a **9** (depending on your system) before the **#** to access an outside line.

There is a combined limit of 30 characters for the pager telephone number and the pager message.

For example, to reach your pager, enter:

4 2 5 5 5 1 2 3 4 # 3

where:

- **#** specifies the next digits are special characters
- **4** recognizes dial tone
- **2** specifies that the next digits are the numbers to be dialed
- **5 5 5 1 2 3 4** is the pager telephone number dialed
- **3** inserts a timed pause


Depending on the company supplying your paging service, the programming sequence can vary. For more information about setting the destination telephone number parameters for your pager, contact your pager company.

To set up Off-premise Message Notification to a pager

- 1 Press **☎ 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.
- 2 If you use the CallPilot interface:
 - Press **8 5** to open the Mailbox Tools
 - Press **NOTIF** or **2** to open the Off-premise Message Notification menu
 - Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **6** to open the Off-premise Message Notification menu
- Go to step 3

- | | |
|--|--|
| Msg notify ADMIN SELECT | 3 Press <u>ADMIN</u> or 1 to set up Off-premise Message Notification. |
| Destination: PHONE EXT <u>PAGER</u> | 4 Press <u>PAGER</u> or 3 to select a pager number destination. |
| Pager: RETRY <u>OK</u> | 5 Enter the destination pager number and press <u>OK</u> or # . |
| <x> ADD <u>OK</u> | 6 Press <u>OK</u> or # to accept the destination pager number represented by <x> or press <u>ADD</u> or 2 to add special characters and use your dialpad or follow the voice prompts to add characters. After you add special characters, press <u>OK</u> or # . |
| Show:<xxxx> CHNG NEXT | 7 Press <u>NEXT</u> or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you or press <u>CHNG</u> or 1 to change the pager message. The combined limit is 30 characters for the pager telephone number and the pager message. |
| More dest? YES NO | 8 Press <u>YES</u> or 1 if you want to set up another destination number or press <u>NO</u> or # if you do not want to set up another destination number. |
| Msg type: new CHNG <u>OK</u> | 9 Press <u>OK</u> or # to be notified when the skillset mailbox receives a new message or press <u>CHNG</u> or 1 to change the message type to be notified only when the skillset mailbox receives an urgent message. |
| Msg notify ADMIN SELECT | 10 Press  to end the session. |

To set up Off-premise Message Notification to more than one destination

You can receive notification of a message at a maximum of five different destination numbers. The following steps show you how to enter a telephone number destination and then add a pager destination for the first time.

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.
- 2 If you use the CallPilot interface:
 - Press **[8] [5]** to open the Mailbox Tools
 - Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
 - Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Ms9 notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Destination:
PHONE EXT PAGER
```

- 4 Press **PHONE** or **[1]** to choose a destination telephone number.

```
Ph:
RETRY OK
```

- 5 Enter the destination telephone number and press **OK** or **[#]**. The destination telephone number cannot be longer than 30 digits.

```
<x>
ADD OK
```

- 6 Press **OK** or **[#]** to accept the destination telephone number, represented by <x>
or
press **ADD** or **[2]** to add special characters and use your dialpad or follow the voice prompts to add characters.

```
Start: hhmm:
RETRY OK
```

- 7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.

```
<start time>
RETRY AM PM
```

- 8 Press **AM** or **[1]**
or
PM or **[2]**.

- | | |
|---|---|
| <pre><start time> RETRY OK</pre> | <p>9 Press <u>OK</u> or <u>#</u> to accept the start time.</p> |
| <pre>Stop hhmm: RETRY OK</pre> | <p>10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single digit hour and minute must be preceded by a zero.</p> |
| <pre><stop time> RETRY AM PM</pre> | <p>11 Press <u>AM</u> or <u>1</u> or <u>PM</u> or <u>2</u>.</p> |
| <pre><stop time> RETRY OK</pre> | <p>12 Press <u>OK</u> or <u>#</u> to accept the stop time.</p> |
| <pre>More dest? YES NO</pre> | <p>13 Press <u>YES</u> or <u>1</u> to set up another destination number.</p> |
| <pre>Notify2: none SETUP NEXT</pre> | <p>14 Press <u>SETUP</u> to set up another destination number.</p> |
| <pre>Destination: PHONE EXT <u>PAGER</u></pre> | <p>15 Press <u>PAGER</u> or <u>3</u> to select a pager number destination.</p> |
| <pre>Pager: RETRY OK</pre> | <p>16 Enter the destination pager number and press <u>OK</u> or <u>#</u>.</p> |
| <pre><xxx> ADD OK</pre> | <p>17 Press <u>OK</u> or <u>#</u> to accept the destination pager number represented by <x> or press <u>ADD</u> or <u>2</u> to add special characters and use your dialpad or follow the voice prompts to add characters.</p> <p>After you add special characters, press <u>OK</u> or <u>#</u>.</p> |
| <pre>Show<xxxx> CHNG NEXT</pre> | <p>18 Press <u>NEXT</u> or <u>#</u> to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you or press <u>CHNG</u> or <u>1</u> to change the pager message. The combined limit is 30 characters for the pager telephone number and the pager message.</p> |
| <pre>Notify2: pager CHNG OTHR <u>NEXT</u></pre> | <p>19 The display shows that the second destination is a pager. Press <u>NEXT</u> or <u>#</u> to continue.</p> |
| <pre>Notify 3: none SETUP NEXT</pre> | <p>20 Press <u>NEXT</u> or <u>#</u> to continue or press <u>SETUP</u> to add another destination.</p> |

```
Start:<start time>
CHNG                NEXT
```

21 Press NEXT or **#** to accept the start time that you entered or press CHNG or **1** to change the start time.


```
Stop:<stop time>
CHNG                NEXT
```

22 Press NEXT or **#** to accept the stop time that you entered or press CHNG or **1** to change the stop time.

```
Msg type: new
CHNG                OK
```

23 Press OK or **#** to be notified when the skillset mailbox receives a new message or press CHNG or **1** to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN SELECT
```

24 Press  to end the session.

Changing Off-premise Message Notification

You can change the parameters and destinations for Off-Premise Message Notification. Refer to “[Off-premise Message Notification parameters](#)” on page 79 for more information about parameters.

If you want to change the time or message type parameters, use the procedure “[To change the time range or type of message parameters](#)” on page 89

If you want to change the destination type refer to the procedure for the destination type.

| To change the destination type | refer to |
|---|-------------------------|
| from a telephone to an extension, pager or another telephone number | page 91 |
| from a pager to an extension or telephone | page 93 |
| from a telephone or extension to a pager | page 95 |

To change the time range or type of message parameters

- 1 Press **☎ 9 8 1**.
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.
- 2 If you use the CallPilot interface:
 - Press **8 5** to open the Mailbox Tools
 - Press **NOTIF** or **2** to open the Off-premise Message Notification menu
 - Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **6** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **1** to set up Off-premise Message Notification.

```
Notify:<>
CHNG      NEXT
```

- 4 Press **NEXT**.
If you want to change the destination type refer to “[To change the destination type](#)” on page 89 for the appropriate procedure.

```
More dest?
YES      NO
```

- 5 Press **NO** or **#** to continue.

```
Start:<start time>
CHNG                NEXT
```

- 6** Press CHNG or **1** to change the start time or press NEXT or **#** to accept the start time.


```
Stop:<stop time>
CHNG                NEXT
```

- 7** Press CHNG or **1** to change the stop time or press NEXT or **#** to accept the stop time.

```
Msg type: new
CHNG                OK
```

- 8** Press CHNG or **1** to change the message type to urgent. Press OK or **#** to accept the new default message. You can choose to be notified of all new messages or urgent messages only. Change the message type to urgent to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN SELECT
```

- 9** Press  to end the session.

To change the destination from telephone to another destination

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:
 - Press **[8] [5]** to open the Mailbox Tools
 - Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
 - Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN  SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Notify: phone
CHNG      NEXT
```

- 4 Press **CHNG** or **[1]** to change the destination.

```
Destination:
PHONE  EXT  PAGER
```

- 5 Press **PHONE** or **[1]** to choose another telephone number destination
or
press **EXT** or **[2]** to choose an extension destination
or
press **PAGER** or **[3]** to choose a pager number destination.

```
<>
RETRY      OK
```

- 6 Enter the destination number and press **OK** or **[#]**.
The destination telephone number cannot be longer than 30 digits.

```
Accept:<xxxx>
RETRY      OK
```

- 7 Press **OK** or **[#]** to accept the destination number
or
press **RETRY** or **[*]** to re-enter the destination number.

```
Notify:<>
CHNG      NEXT
```

- 8 Press **NEXT** or **[#]** to continue
or
press **CHNG** or **[1]** to change the destination, and repeat steps 6 through 8.

```
More dest?
YES      NO
```

9 Press YES or **1** if you want to set up another destination number or press NO or **#** if you do not want to set up another destination number.

```
Start:<start time>
CHNG      NEXT
```

10 Press CHNG or **1** to change the start time or press NEXT or **#** to accept the start time.

```
Stop:<stop time>
CHNG      NEXT
```

11 Press CHNG or **1** to change the stop time or press NEXT or **#** to accept the stop time.

```
Msg type:new
CHNG      OK
```

12 If you want to change message notification, press CHNG or **1** if you want to be notified only when the skillset mailbox receives an urgent message. Press OK or **#**.

```
Msg notify
ADMIN    SELECT
```

13 Press **[END]** to end the session.

To change the destination from pager to telephone or extension

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **[1]** to change Off-premise Message Notification. The display shows the first destination type and destination number.

```
Modify:Pager
CHNG NEXT
```

- 4 Press **CHNG** or **[1]** to change the destination type and the destination number.

```
Destination:
PHONE EXT PAGER
```

- 5 Choose the type of destination number:
press **PHONE** or **[1]** to choose a telephone number destination
or
press **EXT** or **[2]** to choose an extension destination.

```
<xxx>:
RETRY OK
```

- 6 Enter the destination number you want to set up Off-Premise Message Notification for.
<x> represents the destination number.
Press **OK** or **[#]** to accept the destination number
or
press **RETRY** or **[*]** to re-enter the number.

```
Notify:<x>
CHNG NEXT
```

- 7 Press **NEXT** or **[#]** to continue.

```
More dest?
YES NO
```

- 8 Press **YES** or **[1]** if you want to set up another destination, and repeat steps 6 through 8
or
press **NO** or **[#]** if you do not want to set up another destination.

```
Start:<start time>
CHNG                NEXT
```

9 Press CHNG or **1** to change the start time or press NEXT or **#** to accept the start time.


```
Stop:<stop time>
CHNG                NEXT
```

10 Press CHNG or **1** to change the stop time or press NEXT or **#** to accept the stop time.

```
Msg type:new
CHNG                OK
```

11 If you want to change message notification, press CHNG or **1** if you want to be notified only when the skillset mailbox receives an urgent message. Press OK or **#**.

```
Msg notify
ADMIN  SELECT
```

12 Press  to end the session.

To change the destination from telephone or extension to pager

- 1 Press **☐** **9** **8** **1** .
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **8** **5** to open the Mailbox Tools
- Press **NOTIF** or **2** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **6** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **1** to change Off-premise Message Notification. The displays show a review of the first destination type and destination number.

```
Notify:<x>
CHNG NEXT
```

- 4 Press **CHNG** or **1** to change the destination type and the destination number.
<x> represents the type of destination (phone or extension).

```
Destination
PHONE EXT PAGER
```

- 5 Press **PAGER** or **3** to choose a pager number destination.

```
Pager:
RETRY OK
```

- 6 Enter the pager number and press **OK** or **#** to continue.

```
<x>
ADD OK
```

- 7 Press **OK** or **#** to accept the destination pager number represented by <x>
or
press **ADD** or **2** to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press **OK** or **#** .

```
Show:<xxxx>
CHNG      NEXT
```

- 8** Press **NEXT** or **#** to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you or press **CHNG** or **1** to change the pager message. The combined limit is 30 characters for the pager telephone number and the pager message.

```
Notify: Pager
CHNG      NEXT
```

- 9** The display shows notification is set up to a pager. Press **NEXT** or **#** to continue.

```
More dest?
YES      NO
```

- 10** Press **YES** if you want to set up another destination number or press **NO** if you do not want to set up another destination number.

```
Msg type: new
CHNG      OK
```

- 11** Press **OK** or **#** if you want to be notified when the skillset mailbox receives a new message or press **CHNG** or **1** if you want to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN    SELECT
```

- 12** Press **[End Call]** to end the session.

Deleting a destination number

If you have more than one destination number for Off-premise Message Notification, you can delete a destination.

To delete a destination number

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Ms9 notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Notify1:<>
CHNG OTHR NEXT
```

- 4 Press **OTHR** if you want to delete the first destination or press **NEXT** or **[#]** to view the other destinations until you find the destination that you want to delete. When you find the destination that you want to delete, press **OTHR**.

```
Notify 1:<>
DEL INS QUIT
```

- 5 Press **DEL** to delete the first destination number.

```
Notify1:<>
CHNG OTHR NEXT
```

- 6 The first destination number is deleted. The Notify 2 destination changes to become the Notify 1 destination number. To delete more destination numbers, press **OTHR** and repeat steps 4 and 5.

```
Ms9 notify
ADMIN SELECT
```

- 7 Press **[*]** to end the session.

Adding a destination number

Use this procedure if you have set up Off-premise Message Notification and you want to add another destination number. You can have up to five destination numbers.

To add a destination number

- 1 Press **☰** **9** **8** **1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **8** **5** to open the Mailbox Tools
- Press **NOTIF** or **2** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **6** to open the Off-premise Message Notification menu
- Go to step 3

```
Ms9 notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **1** to set up Off-premise Message Notification.

```
Notify:<>
CHNG      NEXT
```

- 4 Press **NEXT** or **#** to continue.

```
More dest?
YES      NO
```

- 5 Press **YES** or **1** to set up another destination number.

```
Notify2: none
SETUP    NEXT
```

- 6 Press **SETUP** or **1** to set up another destination number and follow the steps in [“To set up Off-premise Message Notification to a telephone number”](#) on page 80
or
[“To set up Off-premise Message Notification to an extension”](#) on page 82
or
[“To set up Off-premise Message Notification to a pager”](#) on page 84.

Turning Off-premise Message Notification on or off

You can turn Off-premise Message Notification on or off at any time. If you turn Off-premise Message Notification off, you do not affect any of the assigned parameters.

To turn Off-premise Message Notification on or off

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Ms9 notify
ADMIN SELECT
```

- 3 Press **SELECT** or **[2]** to set up Off-premise Message Notification.

```
Notify on
CHNG TIME OK
```

- 4 Press **CHNG** or **[1]** to turn Off-premise Message Notification off if it is on (as shown).

```
Notify off
CHNG TIME OK
```

- 5 Press **OK** or **[*]**
or
press **TIME** to review the start and stop time parameters.

```
Mailbox admin
GREET PSWD QUIT
```

- 6 Press **[*]** to end the session.

Chapter 8

Setting up agents

Agents handle the calls in your call center. Supervisors are agents with additional capabilities. Supervisors can change their own password and monitor calls between agents and callers. You can record your agent programming in the table “[Call Center agents](#)” on page 175.

About adding agents

The maximum number of agents you can have is 20 for Basic Call Center and 100 for Enhanced Call Center.

For more information about Call Center agents, refer to the *Nortel Call Center Agent Guide*.

Agent properties

| | |
|---------------------------|---|
| Agent ID | Each agent is assigned a unique ID number. Call Center assigns the lowest available ID number, but you can assign a different number when you add the agent. Statistics are collected and reported for each ID number. For more information on statistics, refer to “ Monitoring call activity ” on page 151 and refer to the <i>Nortel Call Center Reporting Set Up and Operation Guide</i> . |
| Name | The agent name can be a maximum of 13 characters. If you do not enter a name, a default agent name appears as the word <i>Agent</i> and the ID number, for example, <i>Agent12</i> . Do not create agent names that have the same first seven characters. If you use Call Center Reporting, it truncates the agent name after the first seven characters and your agent names appear identical. |
| Supervisor | Super indicates that an agent has supervisor status. A supervisor is an agent with supervisor status. A supervisor has additional capabilities, such as the ability to monitor calls between agents and callers. Supervisors can monitor incoming calls only. Supervisors cannot monitor outgoing calls. |
| Automatic answer | Automatic Answer is optional. Select Automatic Answer if you want to force-deliver calls to an agent. If Automatic Answer is enabled, the agent hears a tone that indicates that a call is delivered. The agent is automatically in the handsfree mode. It is important that agents use the Not Ready feature when they are not available to receive calls. If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must answer calls manually. |
| Missed Call Option | The Missed Call Option controls how a call is treated if an agent does not answer the call. Busy assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Logout automatically logs an agent out of their skillset if they do not answer a call. The default is Busy, which returns the call to the skillset. |

| | |
|-----------------------|---|
| Agent priority | <p>When you add agents to Call Center you assign them a priority that represents their level of qualification. The priority can be used to determine which of your agents receives an incoming call. The agent priority ranges from 1 to 20. 1 is the highest agent priority for the most qualified agents. The default value is 10.</p> <p>If you use Enhanced Call Center you can assign agents Dynamic Priority when you assign them to a skillset. With Dynamic Priority, agents can have different priorities depending on which skillset they are logged onto. For example, when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English. The same agent can have a priority of 3 when they are logged onto the Spanish skillset and, a priority of 6 when they are logged onto the German skillset.</p> |
| Activity Codes | <p>Activity Code entry types are Prompted and Optional. If you select Prompted, the agent is prompted to enter Activity Codes on their telephone. If you select Optional, an Activity Code session is not automatically displayed on the agent's telephone, but they can press F907 and enter Activity Codes.</p> <p>Optional is the default. If you do not have Call Center Reporting enabled on your system, this setting does not appear.</p> |

Adding an agent

```
Log:
QUIT  RETRY  OK
```

- 1 Press 0 9 8 3 .
Enter the Call Center Administrator Mailbox number and password, and then press OK.

```
Admin
MBOX  AA  OTHR
```

- 2 Press OTHR.

```
Admin
GLIST  CCR  CC
```

- 3 Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press AGENT.

```
Agent Admin
ADD  DEL  CHNG
```

- 5 Press ADD.

```
Agent ID: x
RANGE  CHNG  OK
```

- 6 The first available agent number is shown.
Press CHNG to change the agent number and enter a new agent number
or
press OK to continue.

```
Agent name: _
RETRY  BKSP  OK
```

- 7 Enter the agent's name and press OK.

```

Priority: 10
CHNG      NEXT

```

- 8** Press CHNG if you want to change the agent's priority or press NEXT and go to step 14.
NOTE: This step appears only if you use Basic Call Center. If you use Enhanced Call Center, go to step 10.

```

Priority:
RETRY     OK

```

- 9** Enter a priority from 1 to 20 for the agent and press OK. 1 is the highest priority. 10 is the default.

```

Supervisor: N
CHNG      NEXT

```

- 10** Press NEXT to keep the agent at agent status or press CHNG and then NEXT to give the agent supervisor status.

```

Auto answer: N
CHNG      NEXT

```

- 11** Press NEXT if you do not want calls to be force-delivered to the agent or press CHNG and then NEXT if you want calls to be force-delivered to the agent.

```

Miss call: BUSY
LOGOUT   BUSY   OK

```

- 12** Press OK to accept BUSY (Make Agent Busy) as the Missed Call option or press LOGOUT to select Automatic Logout and press OK.

```

AC entry: OPT
OPT      PRMPT  OK


```

- 13** Press OK if you want prompting for Activity codes to be optional, or press PRMPT if you want agents to be prompted and press OK.
NOTE: This step appears only if you use Enhanced Call Center.

```

Agent Admin
ADD      DEL    CHNG

```

- 14** Press  to end the session.

Changing an agent

After you add an agent you can change their properties. You must use this procedure if the system times out while you are adding an agent.

The properties you can change for an agent are:

- password
- display name
- priority
- supervisor status
- auto answer options
- missed call options
- Activity Codes

```
Log:
QUIT  RETRY  OK
```

- 1 Press 9 8 3 .
Enter the Call Center Administrator Mailbox number and password, and then press OK.

```
Admin
MBOX  AA  OTHR
```

- 2 Press OTHR.

```
Admin
GLIST  CCR  CC
```

- 3 Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press AGENT.

```
Agent Admin
ADD    DEL  CHNG
```

- 5 Press CHNG.

```
Agent ID:
DIR    RETRY  OK
```

- 6 Enter the ID number of the agent you want to change and press OK. If you do not know the agent's ID number press DIR to search the directory.

```
Login Pswd
RESET  NEXT
```

- 7 Press RESET if you want to reset the agent's password or press NEXT.

```
xxxx
CHNG  NEXT
```

- 8 Press CHNG if you want to change the agent's name or press NEXT and go to step 10.

```
Agent name: _
RETRY  BKSP  OK
```

- 9 Enter the new agent's name and press OK.


```
Priority: 10
CHNG          NEXT
```

- 10** Press CHNG if you want to change the agent's priority or press NEXT and go to step 12.
NOTE: This step appears only if you use Basic Call Center. If you use Enhanced Call Center, go to step 12.

```
Priority:
RETRY        OK
```

- 11** Enter a priority from 1 to 20 for the agent and press OK. 1 is the highest priority.

```
Supervisor: x
CHNG          NEXT
```

- 12** Press CHNG and press NEXT if you want to change the agent's supervisor status or press NEXT.

```
Auto answer: N
CHNG          NEXT
```


- 13** Press NEXT if you do not want calls to be force-delivered to the agent or press CHNG and then NEXT if you want calls to be force-delivered to the agent.

```
Miss call: BUSY
LOGOUT  BUSY  OK
```

- 14** Press OK to accept BUSY (Make Agent Busy) as the Missed Call Option or press LOGOUT to select Automatic Logout and press OK.

```
AC entry: OPT
OPT  PRMPT  OK
```





- 15** Press OK if you want prompting for Activity codes to be optional, or press PRMPT if you want agents to be prompted and press OK.
NOTE: This step appears only if you use Enhanced Call Center.

- 16** Press  to end the session.

Adding multiple agents

You can save time by adding more than one agent a time. When you add multiple agents, the agents have the default agent name and parameters.

```
Log:
QUIT  RETRY  OK
```


- 1** Press    .
Enter the Call Center Administrator Mailbox number and password, and then press OK.

```
Admin
MBOX  AA  OTHR
```

- 2** Press OTHR.

```
Admin
GLIST  CCR  CC
```

- 3** Press CC.

- | |
|------------------|
| CC Admin |
| AGENT SKILL OTHR |
- 4** Press AGENT.
- | |
|--------------|
| Agent Admin |
| ADD DEL CHNG |
- 5** Press ADD.
- | |
|----------------------|
| Agent ID: x |
| RANGE CHNG <u>OK</u> |
- 6** The first available agent number is shown. Press RANGE to add a range of new agents.
- | |
|-----------------|
| Start agent: |
| RETRY <u>OK</u> |
- 7** Enter the start of the range and press OK.
- | |
|-----------------|
| End agent: |
| RETRY <u>OK</u> |
- 8** Enter the end of the range and press OK.
- | |
|--------------|
| Priority: 10 |
| CHNG NEXT |
- 9** Press CHNG if you want to change the agent's priority or press NEXT and go to step 11.
NOTE: This step appears only if you use Basic Call Center. If you use Enhanced Call Center, go to step 11.
- | |
|-----------------|
| Priority: |
| RETRY <u>OK</u> |
- 10** Enter a priority from 1 to 20 for the agent and press OK. 1 is the highest priority. 10 is the default.
- | |
|---------------|
| Supervisor: N |
| CHNG NEXT |
- 11** Press NEXT to keep the agent at agent status or press CHNG and then NEXT to give the agent supervisor status.
- | |
|----------------|
| Auto answer: N |
| CHNG NEXT |
- 12** Press NEXT if you do not want calls to be force-delivered to the agent or press CHNG and then NEXT if you want calls to be force-delivered to the agent.
- | |
|-----------------------|
| Miss call: BUSY |
| LOGOUT BUSY <u>OK</u> |
- 13** Press OK to accept BUSY (Make Agent Busy) as the Missed Call option or press LOGOUT to select Automatic Logout and press OK.
- | |
|---------------------|
| AC entry: OPT |
| OPT PRMPT <u>OK</u> |
- 14** Press OK if you want prompting for Activity codes to be optional, or press PRMPT if you want agents to be prompted and press OK.
NOTE: This step appears only if you use Enhanced Call Center.
- | |
|--------------|
| Agent Admin |
| ADD DEL CHNG |
- 15** Press  to end the session.

Assigning an agent to a skillset

You can assign an agent to one or both skillsets. Each agent is responsible for answering calls for the skillsets they are assigned to.

To assign an agent to a skillset

```
Log:
QUIT  RETRY  OK
```

- 1 Press **9 8 3**.
Enter the Call Center Administrator Mailbox number and password,
and then press **OK**.

```
Admin
MBOX  AA  OTHR
```

- 2 Press **OTHR**.

```
Admin
GLIST  CCR  CC
```

- 3 Press **CC**.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press **SKILL**.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to add an agent to and press **OK**.

```
Status:xxxxxxx
CHNG  NEXT
```

- 6 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. For how to disable a skillset refer to [“Disabling a skillset” on page 48](#). Press **NEXT** to continue.

```
Skillset Admin
PARM  AGENT  ROUTE
```

- 7 Press **AGENT**.

```
Agent-Skillset
ADD  DEL  VIEW
```

- 8 Press **ADD**.

```
Add Agent
INDIV  RANGE  QUIT
```

- 9 Press **INDIV**.

```
Agent ID:
DIR  RETRY  OK
```

- 10 Enter the ID number of the agent you want to assign and press **OK** or press **DIR** to search the directory.

```
xxxx
NEXT
```

- 11 The display shows the agent's name. Press **NEXT**.

```
Priority:10
CHNG  OK
```


- 12 If you use Enhanced Call Center, this display appears that lets you assign dynamic to the agent.

Press **OK** to accept 10 as the agent's priority level in the skillset or press **CHNG** and enter a priority level from 1 - 20. 10 is the default.

```
Agent added
```

13 This display appears briefly.

```
Add Agent
INDIV RANGE QUIT
```





14 Press  to end the session
or
press INDIV to add another agent and follow steps 10 through 13.

Assigning several agents to a skillset

You can save time by adding several agents to a skillset at once. Agents that are already assigned to the skillset are not added again.

To assign several agents to a skillset

```
Log:
QUIT  RETRY  OK
```

1 Press    .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX  AA  OTHR
```

2 Press OTHR.

```
Admin
GLIST  CCR  CC
```

3 Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

4 Press SKILL.

```
Skillset:
RETRY  QUIT  OK
```

5 Enter the number of the skillset you want to assign several agents to and press OK.

```
Status: xxxxxxxx
CHNG  NEXT
```

6 The display shows whether the skillset is enabled or disabled.
You must disable the skillset before you make changes to it. For how to disable a skillset refer to [“Disabling a skillset” on page 48](#).
Press NEXT to continue.

```
Skillset Admin
PARAM AGENT ROUTE
```

7 Press AGENT.

```
Agent-Skillset
ADD  DEL  VIEW
```

8 Press ADD.

```
Add Agent
INDIV RANGE QUIT
```

9 Press RANGE.

```
Start agent:
RETRY  OK
```

10 Enter the ID number of the first agent you want to assign and press OK.

```
End agent:
RETRY  OK
```

11 Enter the ID number of the last agent you want to assign and press OK.

```
Priority: 10
CHNG          OK
```


12 If you use Enhanced Call Center, this display appears that lets you assign dynamic priority to the agent.

Press OK to accept 10 as the agent's priority level in the skillset or
press CHNG and enter a priority level from 1 - 20.
10 is the default.

```
x added
```

13 This display appears briefly.


```
Add Agent
INDIV RANGE QUIT
```

14 Press  to end the session.

Removing agents from a skillset

You can remove an agent from a skillset. When you remove an agent, they are removed from the skillset but not from Call Center. You can assign the agent to another skillset.

```
Log:
QUIT  RETRY  OK
```

1 Press  9 8 3.

Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX  AA  OTHR
```

2 Press OTHR.

```
Admin
GLIST  CCR  CC
```

3 Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

4 Press SKILL.

```
Skillset:
RETRY  QUIT  OK
```

5 Enter the number of the skillset you want to remove an agent from and press OK.

```
Status: xxxxxxxx
CHNG          NEXT
```

6 The display shows whether the skillset is enabled or disabled. The skillset must be disabled before you can delete an agent from it. For how to disable a skillset refer to [“Disabling a skillset” on page 48](#).
Press NEXT to continue.

```
Skillset Admin
PARM  AGENT  ROUTE
```

7 Press AGENT.

```
Agent-Skillset
ADD  DEL  VIEW
```

8 Press DEL.

```
Agent ID:
DIR  RETRY  OK
```

9 Enter the ID number of the agent you want to remove and press OK.

```


xxxxx
DEL          QUIT
    
```

10 The display shows the agent's name.
Press DEL.

```

Agent deleted
    
```

11 This display appears briefly.


12 Press  to end the session.

Viewing agents in a skillset

You can review the agents in a skillset.

```

Log:
QUIT  RETRY  OK
    
```

1 Press  9 8 3 .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```

Admin
MBOX  AA  OTHR
    
```

2 Press OTHR.

```

Admin
GLIST  CCR  CC
    
```

3 Press CC.

```

CC Admin
AGENT  SKILL  OTHR
    
```

4 Press SKILL.

```

Skillset:
RETRY  QUIT  OK
    
```

5 Enter the number of the skillset you want to view and press OK.

```

Status: xxxxxxxx
CHNG          NEXT
    
```

6 The display shows whether the skillset is enabled or disabled.
Press NEXT to continue.

```

Skillset Admin
PARM  AGENT  ROUTE
    
```

7 Press AGENT.

```


Agent-Skillset
ADD    DEL    VIEW
    
```

8 Press VIEW.

```

x: xxxxx
NEXT  PREV  QUIT
    
```

9 The display shows the agent with the lowest ID number in the skillset. You can press NEXT to see the next agent or PREV to see the previous agent.

10 Press  to end the session.

Logging an agent off

```
Log:
QUIT  RETRY  OK
```

- 1 Press **[*]** **[9]** **[8]** **[3]**.
Enter the Call Center Administrator Mailbox number and password,
and then press **OK**.

```
Admin
MBOX  AA  QTHR
```

- 2 Press **QTHR**.

```
Admin
GLIST  CCR  CC
```

- 3 Press **CC**.

```
CC Admin
AGENT  SKILL  OTH
```

- 4 Press **AGENT**.

```
Agent Admin
ADD  DEL  CHNG
```

- 5 Press **[8]**. This option does not appear as a display button option.

```
Agent ID:
OK
```

- 6 Enter the agent's ID number and press **OK**.

```
xxxx
OUT  QUIT
```

- 7 The agent's name is displayed.
Press **OUT**.

- 8 Press **[END]** to end the session.

Deleting an agent

- | |
|---------------------------------|
| Log: QUIT RETRY <u>OK</u> |
|---------------------------------|
- 1 Press 9 8 3.
Enter the Call Center Administrator Mailbox number and password,
and then press OK.
- | |
|---------------------------------|
| Admin MBOX AA <u>OTHR</u> |
|---------------------------------|
- 2 Press OTHR.
- | |
|---------------------------------|
| Admin GLIST CCR <u>CC</u> |
|---------------------------------|
- 3 Press CC.
- | |
|--|
| CC Admin <u>AGENT</u> SKILL OTHR |
|--|
- 4 Press AGENT.
- | |
|------------------------------------|
| Agent Admin ADD <u>DEL</u> CHNG |
|------------------------------------|
- 5 Press DEL.
- | |
|-------------------------------------|
| Agent ID: DIR RETRY <u>OK</u> |
|-------------------------------------|
- 6 Enter the agent's ID number and press OK
or
press DIR to search the directory.
- | |
|--------------------------|
| xxxxx <u>DEL</u> QUIT |
|--------------------------|
- 7 The agent's name is displayed.
Press DEL.
- | |
|---------------|
| Agent deleted |
|---------------|
- 8 The display shows the agent is deleted.
- 9 Press END to end the session.

Resetting an agent password

```
Log:
QUIT  RETRY  OK
```

- 1 Press **9 8 3**.
Enter the Call Center Administrator Mailbox number and password, and then press **OK**.

```
Admin
MBOX  AA  OTHR
```

- 2 Press **OTHR**.

```
Admin
GLIST  CCR  CC
```

- 3 Press **CC**.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press **AGENT**.

```
Agent Admin
ADD  DEL  CHNG
```

- 5 Press **CHNG**.

```
Agent ID:
DIR  RETRY  OK
```

- 6 Enter the ID number of the agent you want to change and press **OK**.
If you do not know the agent's ID number press **DIR** to search the directory.

```
Login Pswd
RESET  NEXT
```

- 7 Press **RESET** to reset the agent's password.

- 8 Press **END** to end the session.

Chapter 9

Intelligent Overflow Routing

Use Intelligent Overflow Routing to control how calls are handled that are waiting in a skillset for an agent. You can specify that a waiting call:

- overflows to one or more skillsets and keeps its conditions and original skillset greetings. Agents from the specified skillsets can answer the call.
- moves to another skillset where the call loses its conditions, and takes on the properties of the new skillset, including skillset greetings. The system tracks the total length of the call from the time the call enters the system until it is answered.
- transfers to the skillset mailbox
- transfers to an extension, mailbox, external telephone number, CCR Tree, Automated Attendant or operator
- changes in priority level

Intelligent Overflow Routing handles calls differently depending on the rules that you create. Each rule is based on a mode, one or more conditions, and one or more actions.

Mode

Intelligent Overflow Routing looks at the mode the skillset is in to determine how to handle a call. A skillset can be in Day mode, Night mode, or 24 Hour Service. Each mode can have its own rules for how to handle calls. The default mode is Day.

Condition

After Intelligent Overflow Routing determines what mode the skillset is in, Intelligent Overflow Routing determines what conditions apply to the call. The two possible conditions are:

- Whether the timer expires. You set the length of time a call waits for an agent before the call is sent to the destination that you specify. The maximum time a call can wait is 59:59. When a call enters a skillset, the timer starts at 00:00. Overflow rules are applied according to the time a call is in a skillset, not according to the total time a call is in the system. For example, if you set up skillset 1 to move a call to skillset 2 after five minutes, and you set up skillset 2 to move a call to skillset 1 after two minutes, a call in skillset 1 will be moved to skillset 2 after five minutes. The call will move back to skillset 1 after an additional two minutes, then back to skillset 2 after an additional five minutes.
- Whether there are agents logged on to the skillset. If there are no agents logged on to the skillset, the call is sent to the destination that you specify. If you select the Agents Not Logged In check box, the overflow rule applies if there are no agents logged on to the skillset. If you do not select the Agents Not Logged In check box, the overflow rule applies if there are agents logged on to the skillset.



Note: You can select both conditions within the same rule. The rule applies when both conditions are met.

Action

When Intelligent Overflow Routing determines that a condition is met for the call, the call goes to the destination you specify. Possible actions are:

- moving the call to a new skillset.
The caller hears the greetings for the new skillset.
- overflowing the call to one or more skillsets.
The caller continues to hear the greetings from the original skillset.
- sending the call to the skillset mailbox
- transferring the call to an extension, external number, mailbox, skillset mailbox, Automated Attendant, CCR Tree or operator
- changing the priority of the call



Note: Note: if an overflow step is configured for No Agents, the overflow rule executes right away, and even a forced greeting will not play. If you want to play the greeting, configure a timer with the No Agents rule.

Examples of Intelligent Overflow Routing rules

Intelligent Overflow Routing gives you flexibility in setting the rules for how calls are handled. The following tables show examples of different ways you can configure Intelligent Overflow Routing rules.

Example 1

In this example, calls to the call center go to skillset 1, which is the company's service department. If a call is not answered by an agent within two and a half minutes, the call overflows to skillsets 2 and 3, the sales department skillsets. An agent from any of the three skillsets can answer the call.

The Call Center Administrator:

- selects the Day service mode
- sets the timer for 2 minutes and 30 seconds
- selects Overflow to Skillset as the action
- selects skillsets 2 and 3

| Mode | Conditions | Action | Explanation |
|------|------------|---------------|---|
| Day | 02:30 | Overflow: 2,3 | This Intelligent Overflow Routing rule applies only if there are one or more agents are logged on. If a call is not answered by an agent before 2 minutes and 30 seconds, the call overflows to skillsets 2 and 3. When a call overflows, it also remains queued at the original skillset destination. |



Note: If you want calls to overflow to multiple skillsets, specify all the skillsets in the same rule. The call bypasses skillsets with busy agents and overflows to the next skillset with an available agent.

Example 2

In this example, calls to the call center go to skillset 1. The Administrator wants to ensure that lower priority calls do not wait in a skillset indefinitely. If a call waits for 2 minutes or more, a higher priority is assigned to the call.

The Call Center Administrator:

- selects the 24 Hour Service mode
- sets the timer for 2 minutes
- selects Change Call Priority only as the action and selects 1 as the new call priority

| Mode | Conditions | Action | Explanation |
|---------|------------|---------------------------|---|
| 24 Hour | 02:00 | Change call priority to 1 | This Intelligent Overflow Routing rule applies to any call that has been waiting in skillset 1 for 2 minutes. If a call is not answered by an agent when the timer elapses, the call priority changes to the highest priority. |

Example 3

In this example, calls to the call center go to skillset 1, which is the company help line. If there are no agents logged on to the help line, the call moves to skillset 2, which is the company's service department. When a call moves to a new skillset, it does not remain queued at the original skillset destination.

The Call Center Administrator:

- selects the Day service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

| Mode | Conditions | Action | Explanation |
|------|------------|--------------------|--|
| Day | No Agents | Move to Skillset 2 | Intelligent Overflow Routing checks to see whether agents are logged on to skillset 1, but does not check the timer. If there are no agents logged on to skillset 1, the call moves to skillset 2 and gets the new greetings for skillset 2. When a call moves to a new skillset, it does not remain queued at the original skillset destination. |

Example 4

In this example, calls to the call center go to skillset 1, which is the company help line. If no agents are logged on to skillset 1, the call immediately moves to skillset 2. If agents are logged on to skillset 1 and the call is not answered within two and a half minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Call Center Administrator creates two rules. In the first rule the Call Center Administrator:

- selects the 24 Hour service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

In the second rule the Call Center Administrator:

- selects the 24 Hour service mode
- sets the timer to 2 minutes and 30 seconds
- selects the skillset mailbox as the action

| Mode | Conditions | Action | Explanation |
|---------|------------|--------------------|--|
| 24 Hour | No Agents | Move to Skillset 2 | The call moves to skillset 2 if no agents are logged on. If agents are logged on and the call is not answered within 2 minutes and 30 seconds, the call transfers to the skillset mailbox. |
| 24 Hour | 02:30 | Skillset Mailbox | |

Example 5

In this example, calls to the call center go to skillset 1, which is the company's help line. If the call is not answered by an agent within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1, the call overflows to skillset 2, which is the service department. If the call is not answered within an additional two minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Call Center Administrator creates two rules. In the first rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow to skillset as the action
- selects skillset 2

In the second rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 4 minutes and 30 seconds
- selects the Agents not logged in check box
- selects the skillset mailbox as the action

| Mode | Conditions | Action | Explanation |
|------|---------------------|------------------|--|
| Day | 02:30 and No Agents | Overflow: 2 | The call overflows to skillset 2 after the call is in skillset 1 for 2 minutes and 30 seconds and if there are no agents logged on to skillset 1. If the call is not answered within an additional 2 minutes the call transfers to the skillset mailbox. |
| Day | 04:30 and No Agents | Skillset Mailbox | |

Example 6

In this example, calls to the call center go to skillset 1, which is the company's help line. The Night Service Mode is set to start at 6:00 pm. After 6:00 pm there are no other skillsets with agents logged on. If no agents are logged on to skillset 1 or if the call is not answered by an agent within two and a half minutes, the call transfers to the skillset mailbox.

In this example, the Call Center Administrator inserts two rules. The Call Center Administrator:

- selects the Night service mode for both rules
- sets the timer to 2 minutes and 30 seconds as the condition for the first rule
- selects the Agents not logged in check box as the condition for the second rule
- selects the skillset mailbox as the action for both rules

| Mode | Conditions | Action | Explanation |
|-------|------------|------------------|---|
| Night | 02:30 | Skillset Mailbox | The call transfers to the skillset mailbox if the call is not answered within 2 minutes and 30 seconds. |
| Night | No Agents | Skillset Mailbox | The call transfers to the skillset mailbox if there are no agents logged on to skillset 1. |

Example 7

In this example, calls to the call center go to skillset 1, which is the company's order desk. Skillset 1 agents are the company's experienced sales agents. If no agents are logged on to skillset 1 and if the call is not answered by an agent within two and a half minutes, the call overflows to skillset 2. Skillset 2 agents are the company's less experienced sales agents.

The Call Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow as the action
- selects skillset 2

| Mode | Conditions | Action | Explanation |
|------|---------------------|-------------|--|
| Day | 02:30 and No Agents | Overflow: 2 | The call overflows to skillset 2 if the call is not answered within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1. |

Example 8

In this example, calls to the call center are answered by skillset 1, the company's sales skillset. If a call is not answered within 10 seconds, it overflows to skillsets 2, 3 and 4. If the call is not answered within an additional 20 seconds, the call goes to the skillset 1 mailbox.

The Call Center Administrator creates two rules.

In the first rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 10 seconds
- sets Overflow as the action
- selects skillsets 2, 3 and 4

In the second rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 30 seconds
- selects the skillset mailbox as the action

| Mode | Conditions | Action | Explanation |
|------|------------|-------------------|--|
| Day | 00:10 | Overflow: 2, 3, 4 | The call overflows to skillsets 2, 3 and 4 if the call is not answered within 10 seconds. The call goes to the skillset mailbox if it is not answered within an additional 20 seconds. |
| Day | 00:30 | Skillset Mailbox | |

Adding Overflow rules

```
Log:
QUIT  RETRY  OK
```

- 1 Press 9 8 3.
Enter the Call Center Administrator Mailbox number and password, and then press OK.

```
Admin
MBOX  AA  OTHR
```

- 2 Press OTHR.

```
Admin
GLIST  CCR  CC
```

- 3 Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press SKILL.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to change and press OK.

```
Status: xxxxxxxx
CHNG  NEXT
```

- 6 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable the skillset Press CHNG and press NEXT to continue.

```
Skill mbox Pswd
RESET  NEXT
```

- 7 Press NEXT to continue.

```
Skillset Admin
PARM  AGENT  OTHR
```

- 8 Press OTHR.

```
Skillset Admin
ROUTE  OVFLW  UNCF
```

- 9 Press OVFLW.

```
Overflow rules
ADD  CHNG  DEL
```

- 10 Press ADD.

```
<2>: MODE
DAY  NIGHT  24HR
```

- 11 The display shows the Overflow rule number. Select whether you want the rule to apply to Day, Night or 24 Hour mode. Day is the default.

```
<2>: Method
TIME  NOAGNT  BOTH
```

- 12 Select TIME if you want Overflow Routing to time how long the call waits in the skillset before it goes to the destination that you specify
or
select NOAGNT if you want Overflow to apply if there are no agents logged onto the skillset
or
select BOTH if you want Overflow to apply if you want TIME and NOAGNT to apply.

```
<2>: Timeout:
RETRY  OK
```

- 13 Enter the time that a call waits in the skillset before it goes to the destination that you specify and press OK.


```
2: Overflow To
SSMBX OFLSS OTHR
```

- 14** Press SSMBX if you want calls to overflow to the skillset mailbox and in the next step enter the mailbox number
or
press OFLSS if you want calls to overflow to another skillset and in the next step enter the skillset number
or
press OTHR for more destinations: Move to another skillset, Transfer or Change call Priority, and in the next step enter the information about where you want to overflow calls.

```
<Data Prompt>
RETRY          OK
```

- 15** Enter the information about where you want to overflow calls and press OK.
The appearance of this display depends on what kind of overflow you choose.

```
Another rule?
YES          NO
```

- 16** Press YES if you want to change or view another Overflow rule
or
press NO to return to the Overflow display shown in step 11
or
press  to end the session.

Changing and viewing Overflow rules

```
Log:
QUIT  RETRY  OK
```

- 1 Press 9 8 3 .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX  AA  OTHR
```

- 2 Press OTHR.

```
Admin
GLIST  CCR  CC
```

- 3 Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press SKILL.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to change and press OK.

```
Status: xxxxxxxx
CHNG  NEXT
```

- 6 The display shows whether the skillset is enabled or disabled.
You must disable the skillset before you make changes to it. To
disable the skillset Press CHNG and press NEXT to continue.

```
Skill mbox pswd
RESET  NEXT
```

- 7 Press NEXT to continue.

```
Skill mbox pswd
RESET  NEXT
```

- 8 Press NEXT to continue.

```
Skillset Admin
PARM  AGENT  OTHR
```

- 9 Press OTHR.

```
Skillset Admin
ROUTE  OVFLW  UNCF
```

- 10 Press OVFLW.

```
Overflow rules
ADD  CHNG  DEL
```

- 11 Press CHNG.

```
1: mode
CHANGE  NEXT
```

- 12 The first Overflow rule, shown here as rule 1, is displayed.
If you want to change another rule, press NEXT until you see the
display in step 17.

Press CHANGE if you want to change the mode of the Overflow rule
(mode is either Day, Night or 24 Hour)

or
press NEXT to continue.

```
1: time
CHANGE  NEXT
```

- 13 Press CHANGE if you want to change the time of the Overflow rule
or
press NEXT to continue.
If you do not have a time set for this Overflow rule this display
does not appear.

```
1: No agents
CHANGE      NEXT
```

- 14** Press CHANGE if you want to change the agent setting of the Overflow rule
or
press NEXT to continue.


```
1: <info>
CHANGE MORE NEXT
```

- 15** The display shows additional information about the Overflow rule. What appears depends on the parameters for the rule. Press CHANGE to change the information displayed
or
press MORE to view more information about the rule
or
press NEXT to continue.

```
1: Priority
CHANGE      NEXT
```

- 16** Press CHANGE if you want to change the priority of the Overflow rule
or
press NEXT to continue.
If you do not have a priority setting configured this display does not appear.

```
Another rule?
YES           NO
```

- 17** Press Yes if you want to change or view another Overflow rule
or
press no to return to the Overflow rules display shown in step 11
or press  to end the session.

Deleting Overflow rules

```
Log:
QUIT  RETRY  OK
```

- 1 Press **[*] 9 8 3**.
Enter the Call Center Administrator Mailbox number and password, and then press **OK**.

```
Admin
MBOX  AA  OTHR
```

- 2 Press **OTHR**.

```
Admin
GLIST  CCR  CC
```

- 3 Press **CC**.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press **SKILL**.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to change and press **OK**.

```
Status: xxxxxxxx
CHNG  NEXT
```

- 6 The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. To disable the skillset Press **CHNG** and press **NEXT** to continue.

```
Skill mbox Pswd
RESET  NEXT
```

- 7 Press **NEXT** to continue.

```
Skillset Admin
PARAM AGENT OTHR
```

- 8 Press **OTHR**.

```
Skillset Admin
ROUTE  OVFLW  UNCF
```

- 9 Press **OVFLW**.

```
Overflow rules
ADD  CHNG  DEL
```

- 10 Press **DEL**.

```
Number to erase
SINGLE  ALL
```

- 11 Press **SINGLE** to erase one rule and go to step 13 or press **ALL** to erase all the overflow rules for the skillset and go to the next step.

```
Erase all rules?
YES  NO
```

- 12 Press **YES** to erase all the overflow rules for the skillset and go to step 15.

```
Erase rule: X
RETRY  OK
```

- 13 Enter the number of the rule you want to delete and press **OK**.

```
Erase rule: X
CHNG  OK
```

- 14 Press **OK** to confirm the deletion or press **CHNG** and enter the number of the rule you want to delete.

- 15 Press **[*]** to end the session.

Chapter 10

Routing table administration

Routing tables determine how the system answers, holds and routes incoming calls to agents in your call center. You set up routing tables to handle incoming calls for each skillset. A call in a skillset receives the treatment specified by the routing table. The treatment can be a combination of greetings, transfers, and being on hold. If an agent becomes available, the call is sent to the available agent.

Each skillset has a Day and a Night Routing Table. Set up the Day Routing Table for your business hours. Set up the Night Routing Table for your non-business hours.

The maximum number of steps you can add to a routing table is 20. You can record the routing table steps you create in [“Routing Tables” on page 178](#).



Note: You can add steps to a routing table only when you set it up. After you set up the table, you cannot add or delete steps. You can modify steps.

Setting up DID routing

You can route calls based on their Direct Inward Dialing (DID) number. DID is the ability to make a telephone call directly to an internal extension, without having to go through the operator.

To route DID calls, set up a DID target line and assign the target line to a skillset.

To set up DID routing for CallPilot 100/150

- 1 From a Norstar telephone, set up a DID target line.
For information about setting up a DID target line refer to the *Norstar System Coordinator Guide*.
- 2 Configure the target line number to be answered by Call Center.
For information about configuring lines refer to [“Configuring lines” on page 29](#).

Fax Detection

Call Center can detect fax calls and route them to a skillset mailbox. If you want Call Center to detect incoming faxes, you must make your first routing table step:

- a Greeting step
- with Forced Play
- without a transfer
- with a greeting that is a minimum of 11 seconds long

Fax Detection applies only if a fax machine is attempting to transmit a fax at the start of a greeting. If a fax transmission starts several seconds after the start of a greeting, it is possible for the fax tone not to be detected.

If you do not set up the routing table to detect a fax call, some fax calls can be routed to agents, and some fax calls can be routed to the routing table's skillset mailbox.

To enable a routing table to detect fax calls, change the first step.

About types of Routing Table steps

You can add these types of steps to routing tables:

| | |
|-----------------------|--|
| Greeting | A Greeting step plays a greeting to callers waiting in a skillset. You assign greeting parameters to each greeting. After the greeting plays, the call goes to the next routing step. If there is no next step, the call ends. |
| Distribute for | <p>During a distribute for step, calls wait to be distributed to agents. If no agents are available before the distribution time expires, the call goes to the next step in the routing table. If there is no next step set up in the routing table, the call ends.</p> <p>The minimum distribution time is zero and the maximum distribution time is 59 minutes and 59 seconds. The default distribution time is 30 seconds.</p> |
| Goto | <p>A Goto step is the last step in a routing table. A Goto step moves the caller to an earlier routing step.</p> <p>For example, if a Goto step points to step 1, the call goes back to step 1 and repeats the steps. The steps are repeated until an agent becomes available or the caller decides to leave a message in the skillset mailbox.</p> <p>The first step in a routing table cannot be a Goto step because there are no possible target steps yet.</p> <p>A Goto step cannot point to itself. A Goto step can only point to any previously created step.</p> |
| Transfer | <p>A transfer step can transfer calls to:</p> <ul style="list-style-type: none"> • an extension • a mailbox • an external number • the Automated Attendant • an operator • a CCR Tree |
| Disconnect | A Disconnect step releases calls from the skillset. If the first step in a routing table is a Disconnect, Call Center does not answer the call. |

Adding a Greeting step

Greeting steps play a message to waiting callers. You must have a greeting recorded before you can use it in a Greeting step. For how to record a Call Center greeting refer to [“Recording a Call Center greeting” on page 36](#).

Greeting step parameters

You can assign these parameters to greeting steps. If the first step in a routing table is a Greeting step, it can detect fax calls and route them to the skillset mailbox for the routing table. For more information refer to [“Fax Detection” on page 128](#).

| | |
|---|---|
| Forced Play | <p>Enable Forced Play for a greeting that contains important information that you want callers to hear. If an agent becomes available while a caller is listening to a Forced greeting, the greeting is not interrupted. The caller must listen to the entire greeting.</p> <p>If you do not enable Forced Play, when an agent becomes available the greeting is interrupted and the call goes to the available agent.</p> <p>Limit the number of Forced Play greetings and keep Forced Play greetings as short as possible. Long Forced Play greetings increase the transfer time of calls to agents and cause unpredictable increases in distribution times. For more information, refer to “Routing Table administration” on page 164.</p> |
| Intelligent Caller Input Routing, Basic (Xfer) | <p>While the greeting plays callers can:</p> <ul style="list-style-type: none"> • press <input type="text" value="1"/> to transfer to the Automated Attendant • press <input type="text" value="0"/> to transfer to the Operator • press <input type="text" value="9"/> to leave a message in the skillset mailbox • press <input type="text" value="2"/> to transfer to a CCR Tree <p>These are the default keypad buttons. You can change the keypad buttons. Ensure that the Non-business hours greetings have Intelligent Call Input Routing, Basic enabled so that callers can direct how they transfer their calls.</p> |
| No Intelligent Caller Input Routing (Norm) | <p>While the greeting plays callers cannot press a dialpad button to transfer their call. Call Center ignores buttons pressed on the dialpad. The greeting plays without interruption. This is the default setting. At the end of the greeting, the caller goes to the next routing step. If there is no next step, the call ends.</p> |

To add a Greeting step

- | | |
|---|--|
| Log: QUIT RETRY <u>OK</u> | 1 Press <u>9</u> <u>8</u> <u>3</u> . Enter the Call Center Administrator mailbox number and password, and then press <u>OK</u> . |
| Admin MBOX AA <u>OTHR</u> | 2 Press <u>OTHR</u> . |
| Admin GLIST CCR <u>CC</u> | 3 Press <u>CC</u> . |
| CC Admin AGENT <u>SKILL</u> OTHR | 4 Press <u>SKILL</u> . |
| Skillset: RETRY QUIT <u>OK</u> | 5 Enter the number of the skillset you want to add a Greeting step to and press <u>OK</u> . |
| Status: xxxxxx CHNG <u>NEXT</u> | 6 If the skillset is enabled, press <u>CHNG</u> to disable it. Press <u>NEXT</u> . |
| Skill mbox Pswd RESET <u>NEXT</u> | 7 Press <u>NEXT</u> to continue. |
| Skillset Admin PARAM AGENT <u>OTHR</u> | 8 Press <u>OTHR</u> . |
| Skillset Admin <u>ROUTE</u> OVFLW UNCF | 9 Press <u>ROUTE</u> . |
| Route Table DAY NIGHT QUIT | 10 Press <u>DAY</u> or <u>NIGHT</u> . In this example, Day is shown. |
| Day routing <u>SETUP</u> QUIT | 11 Press <u>SETUP</u> . |
| Step 1 DIST <u>GRTG</u> OTHR | 12 Press <u>GRTG</u> . |
| Greeting type EWT <u>NORMAL</u> | 13 Press <u>NORMAL</u> . |
| CC greeting: x RETRY <u>OK</u> | 14 Enter the number of the greeting you want to use and press <u>OK</u> . |
| CC greeting: x RETRY <u>PLAY</u> <u>OK</u> | 15 Press <u>OK</u> . |

```
Type: Norm
Force XFER OK
```

16 Assign the parameters for the Greeting step:

- If you want to use Norm, press OK and go to step 32.
- If you want the Greeting to be forced, press Force, press OK and go to step 30.
- If you want the Greeting to be forced and callers to be able to transfer after the greeting, press Force, press XFER and go to step 17.
- If you want callers to be able to transfer during the Greeting, press XFER and go to step 17.

```
AA Key: 1
CHNG DISABL NEXT
```

17 The display shows the default key for the Automated Attendant. Press CHNG if you want to change the key that callers press to reach the Automated Attendant

or

press DISABL if you do not want callers to be able to press a key to reach the Automated Attendant, press NEXT and go to step 20

or

press NEXT to accept the default key and go to step 20.

```
AA Key: disable
CHNG NEXT
```

```
AA Key:
RETRY OK
```

18 Enter the key you want to assign for the Automated Attendant and press OK.

```
AA Key: x
CHNG DISABL NEXT
```

19 Press NEXT.

```
Oper Key: 0
CHNG DISABL NEXT
```

20 The display shows the default key for the Operator. Press CHNG if you want to change the key that callers press to reach the Operator

or

press DISABL if you do not want callers to be able to press a key to reach the Operator, press NEXT and go to step 23

or

press NEXT to accept the default key and go to step 23.

```
Oper Key:
RETRY OK
```

21 Enter the key you want to assign for the Operator and press OK.

```
Oper Key: x
CHNG DISABL NEXT
```

22 Press NEXT.

```
Mbox Key: 9
CHNG DISABL NEXT
```

23 The display shows the default key for the skillset mailbox. Press CHNG if you want to change the key that callers press to reach the skillset mailbox

or

press DISABL if you do not want callers to be able to press a key to reach the skillset mailbox, press NEXT and go to step 26

or

press NEXT to accept the default key and go to step 26.

```
Mbox Key:
RETRY      OK
```

24 Enter the key you want to assign for the skillset mailbox and press OK.

```
Oper Key: x
CHNG  DISABL  NEXT
```

25 Press NEXT.

```
CCR Key: 2 Tr: 1
CHNG  DISABL  OK
```

26 The display shows the default key for a CCR Tree. Press CHNG if you want to change the key that callers press to reach the CCR Tree or press DISABL if you do not want callers to be able to press a key to reach the skillset mailbox, press NEXT and go to step 30 or press OK to accept the default key and go to step 30.

Note: You cannot let callers transfer to a CCR Tree unless you have created a CCR Tree. Refer to the *CallPilot Telephone Administration Guide* or the *CallPilot Manager Set Up and Operation Guide*.

```
CCR Key:
RETRY      OK
```

27 Enter the key you want to assign for the CCR Tree and press OK.

```
CCR Key: x
CHNG      NEXT
```

28 Press NEXT.

```
CCR tree:
RETRY      OK
```

29 Enter the number of the CCR Tree you want callers to transfer to and press OK.


```
CCR Key: x Tr: x
CHNG  DISABL  OK
```

30 Press OK.

```
Type: Norm Xfer
Force  XFER   OK
```

31 Press OK.

```
Another step?
YES          QUIT
```

32 Press YES to continue to build the table or press  to end the session.

If you want to continue to add steps to the table:

- To add a Distribute for step, start at step 10 of [“Adding a Distribute for step” on page 134](#).
- To add a Goto for step, start at step 10 of [“Adding a Goto step” on page 135](#).
- To add a Transfer step, start at step 10 of [“Adding a Transfer step” on page 136](#).
- To add a Disconnect step, start at step 10 of [“Adding a Disconnect step” on page 138](#).



Note: You can add steps to a routing table only when you set it up. After you set up the table, you cannot add or delete steps. You can only modify the steps that you created. If you have set up a routing table and you want to add or remove steps, you must erase the table and create it again.

Adding a Distribute for step

Distribute for steps put callers on hold while they wait for an agent.

- | | |
|--|---|
| Log: QUIT RETRY <u>OK</u> | 1 Press <input type="button" value="⏪"/> <input type="button" value="9"/> <input type="button" value="8"/> <input type="button" value="3"/> . Enter the Call Center Administrator mailbox number and password, and then press <u>OK</u> . |
| Admin MBOX AA <u>OTHR</u> | 2 Press <u>OTHR</u> . |
| Admin GLIST CCR <u>CC</u> | 3 Press <u>CC</u> . |
| CC Admin AGENT <u>SKILL</u> OTHR | 4 Press <u>SKILL</u> . |
| Skillset: RETRY QUIT <u>OK</u> | 5 Enter the number of the skillset you want to add a Distribute step to and press <u>OK</u> . |
| Status: xxxxxx CHNG <u>NEXT</u> | 6 If the skillset is enabled, press <u>CHNG</u> to disable it. Press <u>NEXT</u> . |
| Skill mbox pswd RESET <u>NEXT</u> | 7 Press <u>NEXT</u> to continue. |
| Skillset Admin PARAM AGENT <u>OTHR</u> | 8 Press <u>OTHR</u> . |
| Skillset Admin <u>ROUTE</u> OVFLW UNCF | 9 Press <u>ROUTE</u> . |
| Route Table <u>DAY</u> NIGHT QUIT | 10 Press <u>DAY</u> or <u>NIGHT</u> . In this example, Day is shown. |
| Day routing <u>SETUP</u> QUIT | 11 Press <u>SETUP</u> . |
| Step x <u>DIST</u> GRTG OTHR | 12 Press <u>DIST</u> . |
| Dist time: 00:30 CHNG <u>OK</u> | 13 The default hold time is 00:30. Press <u>CHNG</u> to change the default time or press <u>OK</u> to accept the default and go to step 16. |
| Hold time mms: RETRY <u>OK</u> | 14 Enter the hold time and press <u>OK</u> . |
| Hold time: xx:xx CHNG <u>OK</u> | 15 Press <u>OK</u> . |
| Another step? YES QUIT | 16 Press <u>YES</u> to add another step or press <input type="button" value="⏪"/> to end the session. |

Adding a Goto step

Goto steps send a caller to a previous step in the routing table. You can add a Goto step only to the end of a routing table. There must be additional steps in the route you are setting up.

- | |
|---------------------|
| Log: |
| QUIT RETRY OK |
- 1 Press **[*] 9 8 3**.
Enter the Call Center Administrator mailbox number and password, and then press **OK**.
- | |
|------------------------|
| Admin |
| MBOX AA <u>OTHR</u> |
- 2 Press **OTHR**.
- | |
|------------------------|
| Admin |
| GLIST CCR <u>CC</u> |
- 3 Press **CC**.
- | |
|-------------------------|
| CC Admin |
| AGENT <u>SKILL</u> OTHR |
- 4 Press **SKILL**.
- | |
|-------------------------|
| Skillset: |
| RETRY QUIT <u>OK</u> |
- 5 Enter the number of the skillset you want to add a Goto step to and press **OK**.
- | |
|------------------|
| Status: xxxxxxx |
| CHNG <u>NEXT</u> |
- 6 If the skillset is enabled, press **CHNG** to disable it.
Press **NEXT**.
- | |
|-------------------|
| Skill mbox Pswd |
| RESET <u>NEXT</u> |
- 7 Press **NEXT** to continue.
- | |
|---------------------------|
| Skillset Admin |
| PARM AGENT <u>OTHR</u> |
- 8 Press **OTHR**.
- | |
|----------------------------|
| Skillset Admin |
| <u>ROUTE</u> OVFLW UNCF |
- 9 Press **ROUTE**.
- | |
|--------------------------|
| Route Table |
| <u>DAY</u> NIGHT QUIT |
- 10 Press **DAY** or **NIGHT**.
In this example, Day is shown.
- | |
|-------------------|
| Day routing |
| <u>SETUP</u> QUIT |
- 11 Press **SETUP**.
- | |
|--------------------------|
| Step x |
| DIST GRTG <u>OTHR</u> |
- 12 Press **OTHR**.
- | |
|--------------------------|
| Step x |
| DISC XFER <u>GOTO</u> |
- 13 Press **GOTO**.
- | |
|----------------|
| Goto Step: x |
| CHNG <u>OK</u> |
- 14 Press **CHNG** until the step is displayed that you want the call to go to and press **OK**.
or
press **OK** to accept the step that is shown.
- | |
|----------------|
| Table complete |
|----------------|
- 15 This display appears.
After you add a Goto step you cannot add more steps to the table.
- 16 Press **[*]** to end the session.

Adding a Transfer step

A transfer step can transfer calls to:

- an extension
- a mailbox
- an external number
- the Automated Attendant
- an operator
- a CCR Tree

```
Log:
QUIT  RETRY  OK
```

- 1 Press 9 8 3 .
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX  AA  OTHR
```

- 2 Press OTHR.

```
Admin
GLIST  CCR  CC
```

- 3 Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press SKILL.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to add a Greeting step to and press OK.

```
Status: xxxxxx
CHNG  NEXT
```

- 6 If the skillset is enabled, press CHNG to disable it.
Press NEXT.

```
Skill mbox Pswd
RESET  NEXT
```

- 7 Press NEXT to continue.

```
Skillset Admin
PARAM  AGENT  OTHR
```

- 8 Press OTHR.

```
Skillset Admin
ROUTE  OVFLW  UNCF
```

- 9 Press ROUTE.

```
Route Table
DAY  NIGHT  QUIT
```

- 10 Press DAY or NIGHT.
In this example, Day is shown.

```
Day routing
SETUP  QUIT
```

- 11 Press SETUP.

```
Step x
DIST  DIST  OTHR
```

- 12 Press OTHR.

```
Step x
DISC  XFER  GOTO
```

- 13 Press XFER.
Goto appears only if this is not the first step.

| | | | |
|--------|------|------|--|
| Step x | | | |
| EXTN | MBOX | OTHR | |

14 Add the type of transfer step you want to the Routing Table.

To transfer to an extension:

- Press EXTN
- Enter the extension number and press OK

To transfer to a mailbox:

- Press MBOX
- Enter the mailbox number and press OK

To transfer to an external number:

- Press OTHR
- Press EXTERN
- Press CHNG to select a line, pool or route as the outdial method
- Press NEXT
- Enter the line or line pool number and press OK
- Press OK
- Enter the telephone number you want to transfer the call to
- Press OK

To transfer to the Automated Attendant:

- Press OTHR
- Press AA
- Press CHNG
- Enter the number of the AA table and press OK


To transfer to the Operator:

- Press OTHR
- Press OTHR
- Press OPER
- Press OK

To transfer to a CCR Tree:

- Press OTHR
- Press OTHR
- Press OTHR
- Press CCR
- Enter the number of the CCR Tree and press OK
- Press OK

| | | | |
|-------------|-------|------|--|
| Route Table | | | |
| DAY | NIGHT | QUIT | |

15 Press YES to add another step
or
press  to end the session.

Adding a Disconnect step

Disconnect steps release a call from the skillset it is in. If the first step in a routing table is a Disconnect step, Call Center does not answer the line.

- | | |
|---|---|
| Log: QUIT RETRY OK | 1 Press [*][9][8][3] . Enter the Call Center Administrator mailbox number and password, and then press OK . |
| Admin MBOX AA <u>OTHR</u> | 2 Press OTHR . |
| Admin GLIST CCR <u>CC</u> | 3 Press CC . |
| CC Admin AGENT <u>SKILL</u> OTHR | 4 Press SKILL . |
| Skillset: RETRY QUIT <u>OK</u> | 5 Enter the number of the skillset you want to add a Disconnect step to and press OK . |
| Status:xxxxxxx CHNG NEXT | 6 If the skillset is enabled, press CHNG to disable it. Press NEXT . |
| Skill mbox Pswd RESET <u>NEXT</u> | 7 Press NEXT to continue. |
| Skillset Admin PARAM AGENT <u>OTHR</u> | 8 Press OTHR . |
| Skillset Admin <u>ROUTE</u> OVFLW UNCF | 9 Press ROUTE . |
| Route Table <u>DAY</u> NIGHT QUIT | 10 Press DAY or NIGHT . In this example, Day is shown. |
| Day routing <u>SETUP</u> QUIT | 11 Press SETUP . |
| Step x DIST GRTG <u>OTHR</u> | 12 Press OTHR . |
| Step x <u>DISC</u> XFER | 13 Press DISC . |
| Disconnect <u>OK</u> | 14 Press OK . |
| Table complete | 15 Press [*] to end the session. |

Example of a Day Routing Table

To set up the routing table steps shown in “[Example of Day Routing Table steps](#)”, follow the procedure “[To set up the Day Routing Table example](#)”.

Example of Day Routing Table steps

| Step number | Type of step | Step parameters |
|-------------|----------------|--|
| 1 | Greeting | Greeting 1, information greeting Forced Transfer none enabled |
| 2 | Distribute for | 1:00 (one minute) |
| 3 | Greeting | Greeting 2, general company greeting Not forced play Intelligent Call Input Routing, Basic with defaults |
| 4 | Distribute for | Accept default - distribute for 00:30 (thirty seconds) |
| 5 | Greeting | Greeting 3, please wait greeting Not forced play Intelligent Call Input Routing, Basic with operator default |
| 6 | Goto | Routing Table step 2 |

To set up the Day Routing Table example

```
Log:
QUIT  RETRY  OK
```

- 1 Press **9 8 3**.
Enter the Call Center Administrator mailbox number and password, and then press **OK**.

```
Admin
MBOX  AA  OTHR
```

- 2 Press **OTHR**.

```
Admin
GLIST  CCR  CC
```

- 3 Press **CC**.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press **SKILL**.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to set up and press **OK**.

```
Status: xxxxxx
CHNG  NEXT
```

- 6 If the skillset is enabled, press **CHNG** to disable it.
Press **NEXT**.

```
Skill mbox Pswd
RESET  NEXT
```

- 7 Press **NEXT** to continue.

```
Skillset Admin
PARM  AGENT  OTHR
```

- 8 Press **OTHR**.

```
Skillset Admin
ROUTE  OVFLW  UNCF
```

- 9 Press **ROUTE**.

| | |
|--|---|
| Route Table DAY NIGHT QUIT | 10 Press <u>DAY</u> . |
| Day routing <u>SETUP</u> QUIT | 11 Press <u>SETUP</u> . |
| Greeting type EWT NORMAL | 12 Press <u>NORMAL</u> . |
| Step 1 DIST <u>GRTG</u> OTHR | 13 Press <u>GRTG</u> . |
| CC greeting: x RETRY <u>OK</u> | 14 Enter the number of the greeting you want to use and press <u>OK</u> . |
| CC greeting: x RETRY PLAY <u>OK</u> | 15 Press <u>OK</u> . |
| Type: Force Norm XFER <u>OK</u> | 16 Press <u>Force</u> and press <u>OK</u> . |
| Type: Norm Force XFER <u>OK</u> | 17 Press <u>OK</u> . |
| Another step? <u>YES</u> QUIT | 18 Press <u>YES</u> to continue to build the table. |
| Step 2 <u>DIST</u> GRTG OTHR | 19 Press <u>DIST</u> . |
| Dist time: 00:30 <u>CHNG</u> OK | 20 Press <u>CHNG</u> . |
| Dist time mins: RETRY <u>OK</u> | 21 Enter 0100 and press <u>OK</u> . |
| Dist time: 01:00 CHNG <u>OK</u> | 22 Press <u>OK</u> . |
| Another step? <u>YES</u> QUIT | 23 Press <u>YES</u> . |
| Step 3 DIST <u>GRTG</u> OTHR | 24 Press <u>GRTG</u> . |
| Greeting type EWT NORMAL | 25 Press <u>NORMAL</u> . |
| CC greeting: x RETRY <u>OK</u> | 26 Enter the number of the greeting you want to use and press <u>OK</u> . |
| CC greeting: x RETRY PLAY <u>OK</u> | 27 Press <u>OK</u> . |
| Type: Norm Force <u>XFER</u> OK | 28 Press <u>XFER</u> . |
| AA Key: 1 CHNG DISABL <u>NEXT</u> | 29 Press <u>NEXT</u> . |
| Oper Key: 0 CHNG DISABL <u>NEXT</u> | 30 Press <u>NEXT</u> . |
| Mbox Key: 9 CHNG DISABL <u>NEXT</u> | 31 Press <u>NEXT</u> . |

| | |
|--|----------------------------------|
| CCR Key: 2 Tr: 1 CHNG <u>DISABL</u> <u>OK</u> | 32 Press <u>OK</u> . |
| Type: Norm Xfer Force <u>XFER</u> <u>OK</u> | 33 Press <u>OK</u> . |
| Another step? <u>YES</u> QUIT | 34 Press <u>YES</u> . |
| Step 4 <u>DIST</u> GRTG OTHR | 35 Press <u>DIST</u> . |
| Dist time: 00:30 CHNG <u>OK</u> | 36 Press <u>OK</u> . |
| Another step? <u>YES</u> QUIT | 37 Press <u>YES</u> . |
| Step 5 DIST <u>GRTG</u> OTHR | 38 Press <u>GRTG</u> . |
| Greeting type EWT <u>NORMAL</u> | 39 Press <u>NORMAL</u> . |
| CC greeting: RETRY <u>OK</u> | 40 Press 3 and press <u>OK</u> . |
| CC greeting: 3 RETRY <u>PLAY</u> <u>OK</u> | 41 Press <u>OK</u> . |
| Type: Norm Force <u>XFER</u> <u>OK</u> | 42 Press <u>XFER</u> . |
| AA Key: 1 CHNG <u>DISABL</u> <u>NEXT</u> | 43 Press <u>DISABL</u> . |
| AA Key: disable CHNG <u>NEXT</u> | 44 Press <u>NEXT</u> . |
| Oper Key: 0 CHNG <u>DISABL</u> <u>NEXT</u> | 45 Press <u>NEXT</u> . |
| Mbox Key: 9 CHNG <u>DISABL</u> <u>NEXT</u> | 46 Press <u>DISABL</u> . |
| MBox Key: disable CHNG <u>NEXT</u> | 47 Press <u>NEXT</u> . |
| CCR Key: 2 Tr: 1 CHNG <u>DISABL</u> <u>OK</u> | 48 Press <u>DISABL</u> . |
| CCR Key: disable CHNG <u>OK</u> | 49 Press <u>OK</u> . |
| Type: Norm Xfer Force <u>XFER</u> <u>OK</u> | 50 Press <u>OK</u> . |
| Another step? <u>YES</u> QUIT | 51 Press <u>YES</u> . |
| Step 6 DIST GRTG <u>OTHR</u> | 52 Press <u>OTHR</u> . |
| Step 6 DISC XFER <u>GOTO</u> | 53 Press <u>GOTO</u> . |


Goto Step: 1
CHNG OK

54 Press CHNG.

Goto Step: 2
CHNG OK

55 Press OK.

Table complete

56 Press  to end the session.

Example of a Night Routing Table

To set up the routing table steps shown in “[Example of Night Routing Table steps](#)”, follow the procedure “[To set up the Night Routing Table example](#)”.

Example of Night Routing Table steps

| Step number | Type of step | Step parameters |
|-------------|--------------|---|
| 1 | Greeting | Greeting 6, non-business hours greeting Not forced play Intelligent Call Input Routing, Basic |
| 2 | Disconnect | There are no parameters for the Disconnect option. |

To set up the Night Routing Table example

- | | |
|---|---|
| Log: QUIT RETRY <u>OK</u> | 1 Press <u>9</u> <u>8</u> <u>3</u> . Enter the Call Center Administrator mailbox number and password, and then press <u>OK</u> . |
| Admin MBOX AA <u>OTHR</u> | 2 Press <u>OTHR</u> . |
| Admin GLIST CCR <u>CC</u> | 3 Press <u>CC</u> . |
| CC Admin AGENT <u>SKILL</u> OTHR | 4 Press <u>SKILL</u> . |
| Skillset: RETRY QUIT <u>OK</u> | 5 Enter the number of the skillset you want to set up and press <u>OK</u> . |
| Status: xxxxxx CHNG NEXT | 6 If the skillset is enabled, press <u>CHNG</u> to disable it. Press <u>NEXT</u> . |
| Skill mbox Pswd RESET <u>NEXT</u> | 7 Press <u>NEXT</u> to continue. |
| Skill mbox Pswd RESET <u>NEXT</u> | 8 Press <u>NEXT</u> to continue. |
| Skillset Admin PARM AGENT <u>OTHR</u> | 9 Press <u>OTHR</u> . |
| Skillset Admin <u>ROUTE</u> OVFLW UNCF | 10 Press <u>ROUTE</u> . |
| Route Table DAY <u>NIGHT</u> QUIT | 11 Press <u>NIGHT</u> . |
| Night routing <u>SETUP</u> QUIT | 12 Press <u>SETUP</u> . |

Changing a routing table



Note: You can add steps to a routing table only when you set it up. After you set up the table, you cannot add or delete steps. You can modify steps.

You must disable a skillset before you can change its routing table. For how to disable a skillset, refer to “Disabling a skillset” on page 48.

| To | Follow the procedure |
|-------------------------|---|
| Review steps | “Reviewing Routing Table steps” on page 145 |
| Modify steps | “Modifying Routing Table steps” on page 146 |
| Erasing a routing table | “Erasing a Routing Table” on page 147 |

Reviewing Routing Table steps

```
Log:
QUIT  RETRY  OK
```

- 1 Press **[*] 9 [8] 3**.
Enter the Call Center Administrator mailbox number and password, and then press **OK**.

```
Admin
MBOX  AA  OTHR
```

- 2 Press **OTHR**.

```
Admin
GLIST  CCR  CC
```

- 3 Press **CC**.

```
CC Admin
AGENT  SKILL  OTHR
```

- 4 Press **SKILL**.

```
Skillset:
RETRY  QUIT  OK
```

- 5 Enter the number of the skillset you want to review and press **OK**.

```
Status: xxxxxx
CHNG  NEXT
```

- 6 Press **NEXT**.

```
Skill mbox pswd
RESET  NEXT
```

- 7 Press **NEXT** to continue.

```
Skillset Admin
PARAM  AGENT  OTHR
```

- 8 Press **OTHR**.

```
Skillset Admin
ROUTE  OVLW  UNCF
```

- 9 Press **ROUTE**.

```
Route Table
DAY  NIGHT  QUIT
```

- 10 Press **DAY** or **NIGHT**.
In this example, Day is shown.

```
Day routing
VIEW  ERASE  INS
```

- 11 Press **VIEW**.

```
1: xxxxxx
CHNG  NEXT
```

- 12 Press **NEXT** to view each remaining step.

```
End table
ADD  QUIT
```

- 13 This display appears when you reach the last step.

```
Route Table
DAY  NIGHT  QUIT
```

- 14 Press **[*]** to end the session.

Modifying Routing Table steps

- | |
|---------------------------------|
| Log: QUIT RETRY <u>OK</u> |
|---------------------------------|
- Press 9 8 3 .
Enter the Call Center Administrator mailbox number and password, and then press OK.

| |
|---------------------------------|
| Admin MBOX AA <u>OTHR</u> |
|---------------------------------|

 - Press OTHR.

| |
|---------------------------------|
| Admin GLIST CCR <u>CC</u> |
|---------------------------------|

 - Press CC.

| |
|-------------------------------------|
| CC Admin AGENT <u>SKILL</u> OTHR |
|-------------------------------------|

 - Press SKILL.

| |
|--------------------------------------|
| Skillset: RETRY QUIT <u>OK</u> |
|--------------------------------------|

 - Enter the number of the skillset you want to modify a step for and press OK.

| |
|------------------------------------|
| Status: xxxxxx CHNG <u>NEXT</u> |
|------------------------------------|

 - If the skillset is enabled, press CHNG to disable it.
Press NEXT.

| |
|--------------------------------------|
| Skill mbox Pswd RESET <u>NEXT</u> |
|--------------------------------------|

 - Press NEXT to continue.

| |
|---|
| Skillset Admin PARM AGENT <u>OTHR</u> |
|---|

 - Press OTHR.

| |
|--|
| Skillset Admin <u>ROUTE</u> OVFLW UNCF |
|--|

 - Press ROUTE.

| |
|---|
| Route Table <u>DAY</u> NIGHT QUIT |
|---|

 - Press DAY or NIGHT.
In this example, Day is shown.

| |
|--|
| Day routing: <u>VIEW</u> ERASE INS |
|--|

 - Press VIEW.

| |
|------------------------------|
| 1: xxxxx CHNG <u>NEXT</u> |
|------------------------------|

 - The display shows the first step in the routing table.
Press CHNG if this is the step you want to change
or
press NEXT until you find the step you want to change and then
press CHNG.

| |
|-----------------------------|
| xxxxxxx: RETRY <u>OK</u> |
|-----------------------------|

 - Change the parameters for the step and press OK.

| |
|------------------------------|
| xxxxxxx: CHNG <u>NEXT</u> |
|------------------------------|

 - The display shows the new parameters for the step.
Press NEXT to view or change the next step
or
press to end the session.

Erasing a Routing Table

- | |
|---------------------------------|
| Log: QUIT RETRY <u>OK</u> |
|---------------------------------|
- 1** Press **[*][9][8][3]**.
Enter the Call Center Administrator mailbox number and password, and then press **OK**.
- | |
|---------------------------------|
| Admin MBOX AA <u>OTHR</u> |
|---------------------------------|
- 2** Press **OTHR**.
- | |
|---------------------------------|
| Admin GLIST CCR <u>CC</u> |
|---------------------------------|
- 3** Press **CC**.
- | |
|-------------------------------------|
| CC Admin AGENT <u>SKILL</u> OTHR |
|-------------------------------------|
- 4** Press **SKILL**.
- | |
|--------------------------------------|
| Skillset: RETRY QUIT <u>OK</u> |
|--------------------------------------|
- 5** Enter the number of the skillset you want to delete a routing table from and press **OK**.
- | |
|------------------------------------|
| Status: xxxxxx CHNG <u>NEXT</u> |
|------------------------------------|
- 6** If the skillset is enabled, press **CHNG** to disable it.
Press **NEXT**.
- | |
|--------------------------------------|
| Skill mbox Pswd RESET <u>NEXT</u> |
|--------------------------------------|
- 7** Press **NEXT** to continue.
- | |
|---|
| Skillset Admin PARM AGENT <u>OTHR</u> |
|---|
- 8** Press **OTHR**.
- | |
|--|
| Skillset Admin <u>ROUTE</u> OVFLW UNCF |
|--|
- 9** Press **ROUTE**.
- | |
|---|
| Route Table <u>DAY</u> NIGHT QUIT |
|---|
- 10** Press **DAY** or **NIGHT**.
In this example, Day is shown.
- | |
|--------------------------------------|
| Day routing VIEW <u>ERASE</u> INS |
|--------------------------------------|
- 11** Press **ERASE**.
- | |
|---------------------------------|
| Erase table? <u>YES</u> QUIT |
|---------------------------------|
- 12** Press **YES**.
- | |
|--------------|
| Table erased |
|--------------|
- 13** This display appears briefly.
- | |
|--|
| Day routing SETUP QUIT |
|--|
- 14** Press **SETUP** if you want to create a new routing table or press **[*]** to end the session.

Setting the Service Modes for skillsets

You must set the Service Mode the skillset uses so that calls are answered correctly. You must set the Service Mode using **[*] 9 [8] 2** before calls are answered correctly.

Before you set the Service Mode you must:

- configure a skillset
- set up at least a Day Routing Table for the skillset

The default Call Center Service Mode is 24 hour operation. You can change the hours of operation using the Operator Feature Code (**[*] 9 [8] 2**). There are six possible Service Modes:

| | |
|----------------|--|
| Auto | The skillset uses the Automatic Service Mode. You must configure both the Day and Night Routing Tables before you can assign the Automatic Service Mode to the skillset. |
| Day | The skillset uses the Manual Service mode and the Day Routing Table. You must configure the Day Routing Table before you can assign the Manual Service Mode and the Day Routing Table. |
| Night | The skillset uses the Manual Service mode and the Night Routing Table. You must configure the Night Routing Table before you can assign the Manual Service Mode and the Night Routing Table. |
| 24 Hour | The skillset uses the Day Routing Table only. You must configure the Day Routing Table for 24 hour operation to use this Service Mode. |
| Uninit | The skillset is not configured. You must configure the skillset before you can assign the Service Mode. |
| Invalid | You have only partially configured the skillset. You cannot enable this skillset. |



Note: If you originally configure the skillset with a Day Routing Table only and enable the skillset, Call Center will recognize the Service Mode as Day. Afterwards, if you add a Night Routing Table, Call Center still recognizes the Service Mode as Day. You must set the Service Mode to Auto to get Call Center to function in the Auto Service Mode.

To set the Service Mode for a skillset

```
Pswd:
RETRY      OK
```

- 1 Press **[*] 9 [8] 2**.
Enter the default Operator password **[6] [7] [3] [7] [2] [8] [6] [7]**, (Operator) and press **OK**.
or
if you changed the default Operator password, enter the new password and press **OK**.

```
Choose option
OPER      MODE
```

- 2 Press **MODE**.

```
CC Service
```


- 3 This display appears briefly.

```
Mode 1: Auto
CHNG  VIEW  NEXT
```

- 4** The display shows the Service Mode for skillset 1.
In this example, skillset 1 is in Auto mode.
Press **CHNG** if you want to change the Service Mode to Day or Night
or
press **VIEW** if you want to view the details for the Service Mode
or
press **NEXT** if you have a Day Routing Table for skillset 2.

```
Mode 2: Day
CHNG                NEXT
```

- 5** The display shows the Service Mode for skillset 2.
In this example, skillset 2 is in Day mode.
Press **CHNG** if you want to change the Service Mode to Auto or
Night
or
press **VIEW** if you want to view the details for the Service Mode
or
press **NEXT**.

- 6** Press  to end the session.



Note: Remember to manually choose the Day Routing Table or the Automatic Service Mode when your business returns to regular hours.

Chapter 11

Monitoring call activity

There are two ways that you and supervisors can monitor call activity at your call center:

- “Monitoring agent calls with Silent Monitor” on page 151
- “Monitoring skillsets” on page 154

You can monitor calls by using memory buttons that you program with the Feature Codes for monitoring:

- Display calls waiting in skillsets
- Monitor agent calls .
NOTE: To use , we recommend you program it to a memory button and press the memory button to monitor agent calls.

For more information on monitoring agents, refer to the *Call Center Supervisor Guide*.

Monitoring agent calls with Silent Monitor

When you monitor calls as a Silent Monitor, you are not detected by the agent or callers. You monitor all of the calls on an agent's telephone, rather than on a call-by-call basis. When the current call is completed, the monitoring session of the agent continues. You do not have to reestablish the monitoring session. You must be logged on before you can monitor calls.



Note: While you monitor an agent's calls you monitor all of their calls, including their personal calls. Tell agents that if they make a call that they do not want monitored, they must first log off as an agent, then log on again when they complete the call.

We recommend you program a memory button with , and then press the memory button to monitor calls. If the memory button you choose has an indicator, the indicator shows your log on status. You do not have Call Center calls sent to you while you use .

Setting up Silent Monitor on your system

For monitoring to be silent, you must set up Silent Monitor on your system. If you are not familiar with these procedures, ask your system administrator to set up Silent Monitor.



Note: If the Silent Monitor setting is set to non-silent there is a conference tone at the start of calls that you monitor, therefore monitoring isn't silent.

Note: In the UK the default for Silent Monitor is non-silent. In North America the default is silent.

To set up Silent Monitor

For monitoring to be silent, you must set up Silent Monitor on your CallPilot system through telephone administration. If you do not have access to telephone administration, ask your system administrator to set up Silent Monitor.

- 1 Under **Featr settings** press .
The display shows **Backgrnd Music: N**.
- 2 Press until the display shows **Silent Monitor: Y**.
- 3 Press **CHANGE** to select **Y** or **N**.
- 4 Press to exit, or to continue programming.

Refer to the *MICS ICS 7.0 System Coordinator Guide* for information about using the Silent Monitor on CallPilot 100/150. If you use a CallPilot system, Silent Monitor is available only if you use a MICS 7.0 KSU system or later.

Using Silent Monitor with Answer DN

If you have an Answer DN programmed for your main telephone, and you are using Silent Monitor from your main telephone, the telephone that you have programmed as your Answer DN telephone rings briefly when:

- you monitor an agent who is not on a call, and the agent answers or places a call
- you start to monitor an agent who is on an active call
- you monitor an agent who puts a call on hold and answers another call or unholds the original call.

Monitoring tips

- More than one supervisor can log on to the same skillset.
- An agent can be monitored by only one supervisor at a time.
- While you are on a call, do not initiate a monitoring session.
- You must use a two line display telephone.
- Use a headset rather than handsfree when you monitor calls. This ensures call privacy and reduces the office noise level. Check the documentation for your telephone to make sure that you can use a headset with it.



Note: You cannot monitor an agent who is:

- on a conference call
 - using an Answer DN
 - on an ISDN or Companion set
 - on any type of call if the maximum number of conference bridges (6) are being used
-

Monitoring skillsets

Use 9 0 9 (Display Waiting Calls) to view information about skillsets and the calls waiting in skillsets. The table below describes the information in each display.

| Display | Description |
|------------------|---|
| Skill 1: Enabled | the skillset number and the status of the skillset. The status can be Enabled, Disabled or Uninit (uninitialized). |
| 1: 6 agents | the skillset number and how many agents are currently logged on to the skillset |
| 1: 10 calls | the skillset number and the number of calls waiting in the skillset |
| 1: wait 9:45 | the skillset number and the longest time a call has been waiting in the skillset. |

Display Waiting Calls lets you know when a skillset in your call center gets very busy. You can ask qualified agents to log on to the busy skillset.

To monitor skillsets

1 Press 9 0 9.

The skillset display for skillset 1 appears.

| On a one line display telephone press | On a two line display telephone press | To |
|---------------------------------------|---------------------------------------|--|
| | or <u>GOTO</u> | enter the number of the skillset you want to monitor |
| | or <u>SKILL</u> | go to the next skillset |
| or | or or <u>NEXT</u> | monitor the next enabled skillset |
| | or <u>PREV</u> | go to the previous menu |
| | | go to the next menu |
| | | cancel the session |
| | | exit |



Note: If at any time during a monitoring session you press a programmed memory key your monitoring session ends. Do not press a memory key unless you want to end your monitoring session.



Note: If you have the Call Center Reporting option enabled, you can monitor and record call activity from a computer that is running Call Center Reporting. You need a software authorization code to use Call Center Reporting. Contact your vendor if you are interested in purchasing or trialing Call Center Reporting.

An example of monitoring skillsets

In the example shown here, there are calls waiting in skillset 1. In this situation, after you monitor the skillsets, you can ask any qualified and available agents from another skillset to log on to skillset 1 until the calls in skillset 1 are handled.

1 Press **[*] 9 0 9**.

```
Skill 1: Enabled
GOTO SKILL NEXT
```

2 Press **NEXT** to monitor skillset 1.

In this example, skillset 1 is enabled and appears on the display first. If skillset 1 is not enabled, press **NEXT** to go to skillset 2.

To monitor the next skillset, press **SKILL** at any time.

To monitor another skillset, press **GOTO** and enter the skillset number.

```
1: 7 agents
GOTO SKILL NEXT
```

3 The display shows the number of agents logged on to skillset 1. Press **NEXT**.

```
1: 2 calls
GOTO SKILL NEXT
```

4 The display shows the calls that are currently waiting to be answered by agents in skillset 1. Press **NEXT**.

```
1: wait 4:00
GOTO SKILL NEXT
```

5 The display shows that the call waiting the longest in skillset 1 has been waiting for four minutes.

6 Press **[END]** to end the session

or

press **GOTO** to monitor another skillset and enter the skillset number

or

press **NEXT** to monitor skillset 2.

To monitor calls using a one or two line telephone

You can monitor calls using a one line telephone. While you are using **[*] 9 0 9**, on a one line or a two line telephone you can:

- press **[1]** for **GOTO** to enter the number of the skillset you want to monitor
- press **[2]** for **NEXT**
- press **[3]** or **[6]** for **SKILL** to monitor the next enabled skillset
- press **[4]** for **PREV** to go to previous menu
- press **[#]** to go to the next menu
- press **[*]** to cancel the session

Using a memory button to monitor calls waiting in skillsets

Program a memory button with **☎ 9 0 9** to view the status of all skillsets, including the skillsets that you are logged on to. If the memory button you choose has an indicator, the indicator shows information for the calls for the skillset that you are logged on to. For how to program a memory button, refer to [“Programming a memory button with a Feature Code” on page 19](#).

- If the indicator is off, all of the calls are within the acceptable wait time.
- If the indicator is flashing slowly, at least one call has exceeded the first alert time.
- If the indicator is flashing quickly, at least one call in the skillset has exceeded the second alert time.

For information on setting what the wait times are refer to [“Setting Call Center general properties” on page 25](#).

For information on Primary and Secondary alert times, refer to [“Primary and Secondary alert times” on page 25](#).

Taking some Not Ready time

If you use **☎ 9 0 8** (Not Ready), you do not receive Call Center calls. You can program a Break Time, which makes Call Center automatically wait a short time before it routes the next call to you. You use Break Time to complete any tasks, such as paperwork, required by the last call. If you need some extra time, use Not Ready to prevent Call Center from routing another call to you. Do not use the Do Not Disturb feature. You can use Not Ready while a call is ringing on your telephone. The call that is ringing on your telephone goes back to the skillset. You can program a memory button with an indicator instead of pressing **☎ 9 0 8**.

For how to program a memory button, refer to [“Programming a memory button with a Feature Code” on page 19](#). For more information about Break Time refer to [“Break Time” on page 41](#).



Note: While you use Not Ready, you still receive non-Call Center, intercom and transferred calls.

Using Not Ready

- 1 Press **☎ 9 0 8**. **Make Not Ready** appears on the display.
If you press **☎ 9 0 8** and **Break canceled** appears on the display, you canceled the Break Time that the Call Center Administrator programmed for you. You must press **☎ 9 0 8** again to activate the Not Ready feature.
If you press **☎ 9 0 8** and **Agent active** appears, the Not Ready feature was on and you canceled it. Press **☎ 9 0 8** again to activate Not Ready.
- 2 When you are ready to take calls again, cancel the Not Ready feature by pressing **☎ 9 0 8**.
If **Not ready** appears, press **☎ 9 0 8** again.

Not Ready is automatically enabled if you do not answer your telephone, and if this option is configured in Call Center.

Programming Not Ready to a memory button

You can have convenient, one button access to Not Ready if you program a memory button with the Not Ready Feature Code. If the memory button you choose has an indicator, the indicator shows your busy status:

- If the indicator is off, Not Ready is off.
- If the indicator is on, Not Ready is on.
- If the indicator is flashing, the Break Time feature is on.

For how to program a memory button, refer to [“Programming a memory button with a Feature Code” on page 19](#).

Logging off

Log off when you complete your shift or will be away from your telephone for an extended period.

- 1 Press **[☎] 9 0 4**.
- 2 Enter your Agent ID and press **OK** or **#**.
- 3 Enter your password and press **OK** or **#**.
- 4 Press **OUT**. If **OUT** does not appear, you are not logged on to any skillsets.
- 5 Press **CHNG** until the skillset you want to log off from appears on the display. If you are logged on to only one skillset, that skillset is automatically selected.
- 6 Press **OK**.
- 7 You are logged off from the skillset number displayed, or from all skillsets if **ALL** is displayed.
- 8 Press **[☎]**.

Changing your password





Keep your password confidential. Change your password regularly, about every 30 days.









- 1 Press **[☎] 9 0 4**.
- 2 Enter your Agent or Supervisor ID number and press **OK**.
- 3 Enter your password and press **OK**.
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you use the default password you must change your password.
- 4 Press **ADMIN**.
- 5 Enter a new password from four to eight digits long and press **OK**.
- 6 Enter your new password again and press **OK**.
- 7 Press **[☎]**.

Supervisor Help





With Supervisor Help an agent on a call can request help from a supervisor by pressing a programmed feature button. The agent can send an urgent request for help without interrupting the call, and without the caller being aware of the agent's help request.

Supervisor Help is for situations where an agent is on a call and urgently requires the help of a supervisor without alerting the caller that a supervisor is being called in. It is not intended for routine consultations or when the agent is not on a Call Center call.

A supervisor who receives a help request can accept, deny, or ignore it. A request that is denied or ignored is escalated, and a larger group of supervisors is notified of the request. A supervisor can choose to escalate a request so that it is broadcast to other supervisors who may be better able to handle the request. If a supervisor receives a request while they are not at their set, their     indicator flashes slowly to inform them of the missed request.





If a help request is escalated to a supervisor, their     indicator flashes quickly to inform them of the request. If the call for an escalated help request is still active, the supervisor can accept the request by pressing the     feature key. They do not have to be monitoring agents at the time, but can be answering Call Center calls.



Note: Supervisors who use Make Busy     are still available for help requests.





When a supervisor accepts an agent's request for help, a Silent Monitor session starts and the supervisor begins monitoring the agent's call. The agent who requested help is informed when the monitoring session begins. If the supervisor is already monitoring the call of the agent who requests help, the supervisor is considered to have accepted the request for help.

How Supervisor Help works

To use Supervisor Help supervisors must have a memory button programmed with the Supervisor Help feature code    . The programmed key must have an LCD indicator. The memory button can have a distinct bright color so it can easily be distinguished from the other buttons. For how to program a memory button refer to [“Programming a memory button with a Feature Code” on page 19](#).

When a supervisor is selected to answer an agent's help request, the supervisor's telephone rings once with a distinctive tone, and the Supervisor Help LCD indicator lights up and a message appears on the supervisor's display to accept or deny the call.

As soon as the supervisor accepts the request, Call Center starts a Silent Monitor session between the supervisor and the agent.

If the supervisor denies or ignores a help request, the request is escalated. The     indicator flashes quickly on the sets of all supervisors who are notified of the escalated request. Active escalated requests take precedence over missed requests, so the Supervisor Help LCD indicator does not flash slowly if there are active requests that have not been accepted.

An escalated request goes to supervisors as follows:

| | |
|--|---|
| No supervisors are available | the request escalates to all potential supervisors. If escalation is system wide, a potential supervisor is any logged on supervisor. If escalation is skillset based, a potential supervisor is one who is logged onto the requesting agent's skillsets. |
| The request is denied by the selected supervisor | the request escalates to all potential supervisors except for the selected supervisor, unless the selected supervisor is the only potential supervisor. |
| The request is ignored | the request escalates to all potential supervisors. |

Agents can request Supervisor Help only if they are on an active Call Center call. They cannot use Supervisor Help if they are not logged in, not ready, idle, have a call on hold, or are on a non-Call Center call. An agent can cancel Supervisor Help at any time before a supervisor answers the request.

When an agent requests Supervisor Help, Call Center looks for a single suitable supervisor to handle the request. If no supervisor is available, or the selected supervisor denies or ignores the request, the request is escalated. You set up supervisor selection to be either system wide or skillset based. System wide selection looks for all the available supervisors. Skillset based selection looks for only the supervisors who are assigned to the skillsets the agent is logged on to.





Configuring Supervisor Help

To set up Supervisor Help you must configure the general Call Center properties for request timeout and supervisor selection method.

| For information about | Refer to |
|--------------------------|---|
| Supervisor Help settings | “Setting the Supervisor Help request timeout” on page 28 “Selecting skillsets supervisors can receive help requests from” on page 28 |

How to handle Supervisor help requests


Supervisors can program the Supervise feature (F906) onto a memory button of their telephone.

- 1 Launch Supervisor Help by pressing     or the F906 memory button on your telephone.

```
Help xx?
INFO  YES  NO
```

- 2 The display shows the ID of the agent who is requesting help. Press YES to accept the agent request for help
or
press NO to escalate the request
or
press INFO to view the agent name, time and date of the request, caller ID and caller name of the agent's call.

```
Help xx:
INFO  CANCL  JOIN
```

- 3 The display shows the ID of the agent you are helping. While you monitor the agent, you can press the INFO key to view the time and date of the request, caller ID and caller name of the agent's call.
You can press the JOIN softkey or the MUTE button on your telephone to join in the call.
NOTE: Depending on what system you use, the Join and Mute softkeys may not appear.
- 4 When the help session is complete, press  to end the session.

How to handle missed requests

When a supervisor's Supervisor Help LCD indicator is flashing, the supervisor can retrieve escalated or missed Supervisor Help requests.

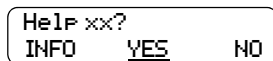
If there are one or more requests, Call Center shows all of the requests. Escalated requests for calls that are still active are shown first, from the oldest to most recent. After that, missed requests are shown from the oldest to the most recent.

A supervisor can accept the call by pressing the YES softkey. After the supervisor accepts the request, the request no longer appears to other supervisors who are retrieving help requests. Their displays show the next escalated request, or the first missed request if there are no more escalated requests, or "No help requests" if there are no more missed requests.

For a missed request, the prompt "xx:aname asked" appears, and the supervisor can retrieve information about the call by pressing the INFO softkey, or can move to the next request by pressing the NEXT softkey.






An example of retrieving an escalated request

The supervisor launches the Supervisor Help feature by pressing the Supervisor Help (F906) feature key.



```

Help xx?
INFO  YES  NO
  
```

- 1 Launch the Supervisor Help feature by pressing     or the F906 memory button on your telephone.
- 2 The display shows the ID and name of the agent requesting help. Press YES to accept the help request
or
press INFO to see more information about the request
or
press NO to deny the request. This escalates the request, and the display shows the next help request, if there is one.
- 3 When the help session is complete, press  to end the session.

For a missed request, the prompt "aa asked help" appears".

After a missed request is viewed by a supervisor, it is not shown to any other supervisor.

Chapter 12

Tips for operating Call Center

This chapter has tips on improving the operation of Call Center.

Agent administration

- Agents can log on to any telephone on the system.
- Call Center has an Auto Busy Mode feature that ensures that calls do not ring indefinitely at an abandoned agent set. If an agent does not answer a call within a specified number of rings, the call returns to the skillset to be presented to another agent, and the telephone is placed into Auto Busy Mode by Call Center. The agent must manually cancel Auto Busy Mode to resume accepting calls.

Skillset administration

- If a call comes in on a line that belongs to a skillset with no available agents, the call is not answered until either the Delay Answer Time elapses or an agent becomes available for the call.

During the Delay Answer period when the caller hears ringback, the line the call comes in on still rings on the sets configured to answer this line.

If your call center has long Delay Answer Times (longer than about 10 seconds), in your greeting specify to callers that their call is being tracked by Call Center. Otherwise, it is possible for callers not to understand the long ringback delay and hang up.

Call Center greetings

- Record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, waiting callers must wait longer before they hear a greeting. The longest recorded greeting for a skillset affects the frequency with which callers hear greetings. If your greeting length times vary a lot, there is a very large variance in how often callers hear greetings. Therefore it is best to keep greetings similar lengths if possible, about 20 seconds each.
- Ensure that when you record a greeting that transfers callers to a skillset mailbox you include in the greeting: *“To leave a message in the mailbox press [9]”* (or the keypad button you designate for the skillset mailbox).

Routing Table administration

- Use Forced Play greetings sparingly. If you use Forced greetings, keep them as short as possible. Many long Forced Play greetings slows transferring calls to agents and causes unpredictable increases in distribution times. Calls in other skillsets are not affected.
- When a Forced Play greeting plays for the highest priority call in a skillset, the other lower priority calls in the skillset have to wait even if agents become available during this time. For example, the longest waiting call, which is the highest priority call, gets routed to a Forced Play greeting. Agents become available during the time that the highest priority call is played a Forced Play greeting. The result is that no calls in this skillset are routed to an agent until the Forced Play greeting is finished playing to the highest priority call. This guarantees that the highest priority call is answered before lower priority calls in the skillset.
- Ensure that an Intelligent Caller Input Routing, Basic transfers calls to a skillset mailbox if you want callers to be able to press **9** to leave a message in a skillset mailbox. Remember to mention in the greeting to press **9** to leave a message in a mailbox.
- Program Intelligent Caller Input Routing, Basic to transfer calls to a skillset mailbox for Non-business hours greetings so that you do not miss any messages.
- If a Goto step follows a greeting, make a Distribution step the target for the Goto step. If you make the Goto target step after a Greeting step another Greeting step, callers hear two greetings in a row.

Call Center general parameters

- Do not assign all the available voice channels as reserved channels. Otherwise, there will be no channels available for voicemail.
- A reserved or voice channel is used when:
 - a Call Center greeting is played to a caller
 - Off-premise Message Notification notifies you of a message in a skillset mailbox

How to calculate the longest time a caller can be on hold

The formula used to calculate the longest wait time a caller can be on hold without hearing a greeting is:

$$\text{Wait Time} = \left[\left(\frac{\text{maximum calls}}{\text{voice channels}} \right) - 1 \right] \times \text{maximum greeting length}$$

where:

- **wait time** is the longest time in seconds that a caller can be on hold without hearing a greeting
- **maximum calls** is the maximum number of calls that Call Center can normally handle
 - In a call center where external calls are **not** transferred or forwarded to Call Center, the maximum number of calls is the same as the number of lines programmed to be answered by Call Center
 - In a call center where external calls **are** frequently transferred or forwarded to Call Center, the maximum number of calls is the total number of lines on the system.
For information on how calls transfer to a skillset, refer to [“How incoming calls are sent to a skillset” on page 39](#).
- **voice channels** is the estimated number of voice channels available to Call Center
 - The minimum number of voice channels available is equal to the number of reserved channels you set up in General call center parameters. Additional channels that are not used by CallPilot can also be used. For example, even though you assign two reserved channels when you set up the General Call Center parameters, Call Center can use additional voice channels if and when they are available.
- **maximum greeting length** is the duration of the longest greeting of a skillset in seconds

Tips to improve the efficiency of Call Center

Plan for busy times:

- when you assign agents to the skillsets, assign as many qualified agents as possible to answer calls for the skillsets
- have more agents log on to a skillset when it gets busy

Plan for slow times:

- for example, if agents are logged on to skillset 1 only, ensure that incoming calls to skillset 2 overflow to skillset 1. When you set up skillset parameters for skillset 2, assign a time to the Overflow parameter. Then callers can still speak to an agent.
- When no agents are logged on to any skillset, ensure that the Call Center greetings you use for the Routing Table have Transfers set up. If a Call Center greeting transfers to a skillset mailbox, callers can press **9** to leave a message in the skillset mailbox. Ensure that the greeting includes that callers can press **9** to leave a message in a mailbox. **9** is the default keypad button callers can press to transfer to the skillset mailbox. You can select a different number.

Chapter 13

Troubleshooting Call Center

This chapter contains troubleshooting information for problems that can occur while setting up and operating Call Center.

Resetting passwords

You can reset passwords if they are lost or forgotten.

| To reset | refer to |
|--|--------------------------|
| the Operator password | page 167 |
| the Call Center Administrator password | page 32 |
| a skillset mailbox password | page 62 |
| an agent password | page 113 |

Resetting the Operator password

You can reset the Operator () password if it is lost or forgotten.

is used by the receptionist, Operator and Call Center Administrator.

If you reset the Operator password it is reset to (Operator).

To reset the Operator password

- Press .
- Set:xxx NEXT
- Press .
- In this example, xxx represents the CDN for skillset 1.
- Enter (Resetoperpswd) and press OK.
- Pswd
RETRY OK
- Press YES.
- Reset Pswd?
YES NO
- The session ends.
The Operator password is now reset to (Operator.)
- Exit

Agent problems

Agent log on problems

If an agent cannot log on at their telephone:

- ensure the agent ID and password match
- check to see if the agent is already logged on to a different telephone
- check to see if a different agent is logged on to this telephone

Important considerations about how agents use features

Call Transfer

Agents can use Transfer to transfer a call to another agent, another person such as a subject matter expert, or send the call back to a skillset.

- If the agent wants to send the call to a specific agent or another person, the agent can enter the Transfer Feature Code (**☎ 7 0**) and enter the extension number.
- If the agent wants to send the call to a skillset, the agent can enter the Transfer Feature Code (**☎ 7 0**) and enter the CDN of a skillset to send the call to a skillset.
- If you are monitoring an agent and they transfer a call, you do not continue to hear the call.

Agents who want to transfer a call to a mailbox should use **☎ 9 8 6**.

Multimedia Call Center agents do not receive Call Center voice calls, but other Call Center agents can transfer voice calls to Multimedia Call Center agents.

Call Forward

Advise agents not to use Call Forward. An agent who uses Call Forward is automatically logged out or made auto busy, depending on their agent settings, after the number of rings for transfer callback elapses. Agents can use Call Forward to the voicemail DN.

Answer DN

If you are doing silent or muted monitoring, the only way agents should use Answer DN is if they program their portable set to be the Answer DN for their main telephone. This is because you will not be able to monitor calls that agents answer on their Answer DN. You can only monitor calls that agents answer from the set they are logged on to. For more information about using Answer DNs with Call Center, refer to the *Norstar System Coordinator Guide*.

If an agent uses their Answer DN telephone to answer a call that is transferred to them, Call Center does not recognize the agent as being busy, and still sends calls to the agent's main set.

Agents who log on from a regular telephone and answer Call Center calls using an answer DN key from a portable telephone cannot use Supervisor Help.

Do Not Disturb

Instead of using Do Not Disturb, agents must use the Not Ready Feature Code (**☎ 9 0 8**). If agents use Do Not Disturb they are automatically logged out or made not ready after the first call.

Call Forward No Answer

When an agent's phone is on Call Forward No Answer to the voicemail extension, the number of rings for Call Forward No Answer must be less than the number of rings for Transfer Callback Timeout. If a call is forwarded by CFNA to another agent and is answered by that agent, the original agent who has CFNA setting is made Not Ready or logged out instead of staying idle.

Preventing calls from ringing at an agent's set

To prevent agents who are on a Call Center call from having a second internal call ring on their phone, set the Call Forward on Busy feature for your set to the voicemail DN.

For information on programming any of these settings, refer to the *Norstar System Coordinator Guide* if you use another system.

Hunt groups

Do not program an agent telephone to be a member of a Hunt Group.

Automatic Answer

How Automatic Answer works depends on what type of telephones your call center uses:

- **Norstar telephones:** If you use a headset, calls ring at the telephone and the headset, but calls go to the headset.
- **Business Series Terminals:** If you connect the headset before you connect the telephone cable to the phone jack, calls goes to the handsfree speaker. If you plug in the telephone before you connect the headset, calls go to the headset as long as you have initialized the headset by pressing the headset button and then the release button. Calls always ring at the set. Every time you reconnect the headset you must initialize the headset. Calls always ring at the set.
- **T7316e:** This type of telephone is safe to use for Automatic Answer.

Silent Monitor

If agents answer calls using features like Answer DN or Call Pickup on a set they are not logged onto, you cannot monitor these calls. You can do monitoring for wireless sets (including Companion, KIRK and DECT sets), only if the agent logs onto the set.

Skillset problems

Problems changing skillset properties

If you cannot change a skillset's properties, there are two possible reasons:

- The call center skillset is enabled.
You must disable the call center skillset before you can change the skillset properties.
- The skillset mailbox has the wrong extension number.
Refer to [“Determining a skillset mailbox number” on page 56](#) for how to determine a skillset's extension number. The extension number of the skillset mailbox must be the same as the Control DN of the skillset. If the skillset mailbox has the wrong extension, you cannot change the properties for a skillset mailbox.

Chapter 14

Call Center Programming Record

| For this programming task | see | on page |
|--|--|---------|
| Record the Feature Codes used by Call Center | Feature Codes | 172 |
| Record the line information for lines answered by Call Center | Line answering | 179 |
| Record the Operator and Business Status settings | Operator/Business Status | 173 |
| Record the number of reserved channels and the Primary and Secondary Alert times | General Call Center parameters | 172 |
| Record agent ID, agent name, Priority, supervisor status and skillset for each agent | Call Center agents | 175 |
| Record Control DN, skillset name, MWI ext, Method, Break Time and Delay Answer time limit | Call Center skillsets | 174 |
| Record agents assigned to the skillsets | Skillset assignments | 176 |
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Note: Make copies of these pages as required.

Feature Codes

| Feature code name | Dialpad buttons | Custom Feature Code |
|---------------------------------|--|--|
| Display Waiting Calls | <input type="button" value="9"/> <input type="button" value="0"/> <input type="button" value="9"/> | <input type="button" value="9"/> ____ ____ |
| Open Mailbox | <input type="button" value="9"/> <input type="button" value="8"/> <input type="button" value="1"/> | <input type="button" value="9"/> ____ ____ |
| Log on/Log off | <input type="button" value="9"/> <input type="button" value="0"/> <input type="button" value="4"/> | <input type="button" value="9"/> ____ ____ |
| Supervise agents | <input type="button" value="9"/> <input type="button" value="0"/> <input type="button" value="5"/> | <input type="button" value="9"/> ____ ____ |
| Not Ready | <input type="button" value="9"/> <input type="button" value="0"/> <input type="button" value="8"/> | <input type="button" value="9"/> ____ ____ |
| Return to skillset on No Answer | | <input type="button" value="9"/> ____ ____ |
| Voice mail DN | <input type="button" value="9"/> <input type="button" value="8"/> <input type="button" value="5"/> | <input type="button" value="9"/> ____ ____ |
| Operator status | <input type="button" value="9"/> <input type="button" value="8"/> <input type="button" value="2"/> | <input type="button" value="9"/> ____ ____ |

General Call Center parameters

| | |
|--|---|
| Number of Reserved channels | |
| Primary alert time limit in mm:ss | |
| Secondary alert time limit in mm:ss | |
| CLID Parameter | No CLID Number Only Name & Number |
| Supervisor Help request timeout value | |
| Skillsets supervisors can receive help requests from | |
| Lines answered by Call Center | |

Operator/Business Status

| | | | |
|-------------------------------------|----------------------|--------|-----------|
| Password OPERATOR (67372867) | | | |
| Receptionist or Operator available* | | Y | N |
| Business open* | | Y | N |
| Answer trunks | | Y | N |
| Receptionist or Operator extension | | | |
| Call Center Service* | Skillset Number ____ | Auto | |
| | | Manual | Day Night |
| | Skillset Number ____ | Auto | |
| | | Manual | Day Night |

* These settings are usually changed by the receptionist or Operator on a daily basis.

Call Center skillsets

| Skillset parameter | Rules | Skillset # |
|-------------------------------------|---|------------|
| Skillset name | Maximum 16 characters. Default is SKILLn | |
| Control DN (CDN) | Extension cannot be used by another telephone or peripheral | |
| MWI extension | | |
| Method | Least Busy (default) or Preferred | |
| Break Time | Enter as mm:ss Minimum: 00 min 00 sec Maximum: 59 min, 59 sec Default: 00:30 | |
| Delay answer | Enter as mm:ss Minimum: 00 min 00 sec Maximum: 10 min 00 sec Default: 00:00 | |
| Attendant extension | | |
| Language | | |
| Activity Codes | Prompted or Optional (default) You must have Call Center Reporting enabled. | |
| Expected Wait Time sample | 2 - 256 | |
| Expected Wait Time Increase Allowed | Enabled (default) or Disabled | |
| Initial Call Duration | 00:00:01 - 24:00:00. Default is 00:03:00. | |
| Service Mode | Auto, Day, Night, 24 Hour (default) | |

Glossary

AA

See Automated Attendant.

Agent

An agent is a person who is assigned to answer calls for one or more skillsets in your call center.

Agent ID

When you add an agent, Call Center assigns an agent ID number you use to identify the agent. The agent uses their agent ID number and password to log on when they are ready to receive calls.

Alert times

Alert times are time limits that you assign for calls waiting in skillsets. If a call exceeds the Primary or the Secondary alert time limit, a programmed memory button indicator flashes. A slow flash means that a call has exceeded the Primary alert time. A quick flash means that a call has exceeded the Secondary alert time.

Attendant

The attendant is the person who you assign to answer an extension number. The attendant can be a receptionist, operator or target attendant.

Automated Attendant (AA)

The Automated Attendant is an automatic answering service. AA answers incoming calls with a Company Greeting and a menu of options. AA routes calls in response to a caller's dialpad selections. For a greater range of options and services for incoming calls, a Custom Call Routing (CCR) menu can be assigned to play instead of the Automated Attendant menu.

Automatic Answer

Automatic Answer is an agent parameter that force delivers calls to an agent. If Automatic Answer is enabled, the agent hears a tone that indicates that a call is delivered. The agent is automatically in the handsfree mode.

If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must manually answer the calls.

Break Time

Break Time is a time period you set up for agents to complete paperwork or other tasks after they finish a call. After an agent completes a call, no calls are routed to them for the Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code.

CCR

See Custom Call Routing.

CDN

See *Control Directory Number*.

Call Center

Call Center receives, holds and routes calls to agents in a call center.

call center

A call center is a department or a business that uses Nortel Call Center to handle numerous incoming calls. A call center typically employs several agents to answer calls.

Call Center Administrator

The Call Center Administrator sets up, and manages the day-to-day operation of a call center. The Call Center Administrator monitors the overall performance of the call center and balances the staffing according to call traffic demands.

Call Forward All Calls (CFAC)

This feature forwards all calls from a telephone to another extension number. For example, all calls from a telephone can be forwarded to the CDN of a skillset.

Call Forward No Answer (CFNA)

This feature forwards unanswered calls from a telephone to another extension number. A call is considered unanswered if no one answers the call before a specified number of rings.

Call Forward On Busy (CFB)

This feature forwards all calls from a telephone to another extension if any of the lines assigned to the telephone are busy.

Channel

A channel is the voice path that Call Center uses to play greetings to callers. A voice channel is also the voice path used when anyone uses a Feature Code to access Call Center.

Class of Service

The Class of Service defines the values for mailboxes.

Control Directory Number (CDN)

The Control Directory Number (Control DN or CDN) is the extension number of a Call Center skillset. The CDN is the number used to transfer calls to a skillset. The CallPilot installer is responsible for assigning a CDN to each skillset before the skillset can be enabled.

Custom Call Routing (CCR)

CCR is a routing feature that you can program to present a customized menu of single-digit choices to callers. CCR automatically answers lines and presents callers with customized menus. With CCR, callers can listen to pre-recorded messages, leave a message in a skillset mailbox or transfer to an extension. With CCR you can replace

Automated Attendant menus with a more sophisticated menu that offers callers a wider range of options.

Delay Answer

Delay Answer is a feature that prevents Call Center from answering calls and playing greetings when there are no agents available. When a skillset has Delay Answer activated, waiting callers hear ringback.

When a call comes in on a line for a skillset that does not have any free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever comes first.

Display Waiting Calls

Display Waiting Calls is a Feature Code that you and agents can use to display waiting calls and view real-time information about skillsets. The Display Waiting Calls/Skillset Status Feature Code shows:

- the skillset number and whether the skillset is enabled or disabled
- number skillset of agents logged into the skillset
- number of calls waiting
- the longest wait time of a call

DN

DN is a Directory Number or an extension number.

Greeting Table

The Greeting Table determines which recorded greeting is played and which line is answered according to the time of day.

Indicator

See *memory button indicator*.

Intelligent Caller Input Routing, Basic

Intelligent Caller Input Routing, Basic lets callers direct their calls to an Operator, Automated Attendant, skillset mailbox, CCR Tree.

Intelligent CLID/DNIS Routing

CLID/DNIS Routing is the initial routing that Call Center calls encounter. The CLID/DNIS Routing you set up lets Call Center route calls quickly based on their incoming line number. Callers are routed to skillsets depending on who the caller calls, the line the call comes in on, or where the caller is calling from.

Longest idle

Longest idle is a method of call distribution that routes calls to the agent who has been available the longest. The other method of call distribution is Preferred.

MWI

See *Message Waiting Indication*.

Memory button indicator

Memory button indicators are the triangular-shaped LCD indicators on a telephone next to the memory buttons. Memory button indicators can be used to monitor call activity and view the Login/Logout status and the Not Ready status of agents.

Message Waiting Indication (MWI)

The Message Waiting Indication appears on a telephone display as *Message for you* when there are new messages.

Message Waiting Indication extension (MWI extension or MWI DN)

For each skillset mailbox, you can assign a telephone as the designated MWI extension. The Message Waiting Indication extension is an optional telephone number that indicates when a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* on the telephone display when there are new messages in the skillset mailbox.

Method of Call Distribution

The method of call distribution determines which of several available agents to route the call to. There are two methods of call distribution: Least Busy and Preferred. Least Busy routes calls to an agent who has been available the longest. Preferred routes calls to the agent with the highest priority (the best qualified agent).

Not Ready

Not Ready is a Feature Code that extends a Break Time if agents need additional time after a call to do paperwork or other tasks.

Off-premise Message Notification

Off-premise Message Notification is a feature that notifies you at a destination number when there are new or urgent messages in a skillset mailbox.

Priority

You assign a priority to each agent according to their qualifications. An agent can have a priority from 1 to 20. 1 is the highest priority. You can assign this priority to your most experienced agents.

Primary alert time

The Primary alert time is the first time limit that you assign for calls waiting in skillsets. If a call exceeds the Primary alert time limit, you are given a visual warning on programmed memory button indicators. The other alert time is Secondary alert time.

Make Not Ready (Return to Skillset)

Make Not Ready (Return to Skillset) is a property that controls how a call is treated if an agent does not answer the call. Make Not Ready assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Automatic Logout automatically logs an agent out of their skillset if they do not answer a call.

Real time

Real time is a term for when there is very little response time between when an event occurs and when the information about the event is displayed. You can monitor the real time or current situation of agents and call activity by using the Display Waiting Calls Feature Code.

Reserved channel

Reserved channels are voice channels reserved exclusively for Call Center. Reserved channels are used to play greetings to callers waiting in a skillset. These channels ensure that CallPilot does not use all the voice channels. See also *voice channel*.

Routing Table

Routing Tables handle incoming calls for each skillset. A Routing Table determines the order of greetings and hold times for callers while they wait to be routed to an available agent.

Skillset

Skillsets collect and distribute calls for departments such as “sales” and “technical support”. If several calls arrive at the same time, the calls are held in a skillset where callers hear greetings and are put on hold until an agent is available.

Skillset mailbox

A skillset mailbox stores messages left by callers. The calls can be retrieved by designated agents.

Skillset name

The skillset name is a maximum of 16 characters. A skillset name is the same as the skillset mailbox name.

Subscriber

A subscriber is a mailbox owner.

Supervisor

A supervisor is an agent with supervisor status. A supervisor has additional capabilities, such as the ability to monitor calls between agents and callers.

Supervisor monitor

Supervisor monitor is a feature supervisors can use to monitor or participate in calls between agents and callers.

Voice channel

A voice channel is the voice path that Call Center uses to play greetings to callers.

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