

USER GUIDE

Call Center Configuration User Guide

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About Fusion Connect Call Center

Fusion Connect Call Center provides simple and scalable call queuing to meet the needs of your business. Agents can conference in other agents and escalate calls to supervisors. Supervisors can monitor queues and agents via a real-time dashboard, receive daily queue activity reports via email, and pull real-time call center statistics.

How to Configure Your Call Center

1. Log in to the Fusion Connect Customer Portal (<https://my.fusionconnect.com>)
2. Select **Voice** under Services
3. Select **Manage Now** (Voice Administration)

There are two options for configuring your Call Center:

1. **Dashboard** (for high-level/frequent configurations)
2. **Group Services** (for detailed configurations)

Call Center Console

Some configurations are made in the Call Center Console. To access your Call Center Console:

1. Log in to the Voice Manager
2. Click **Software**
3. Click **Call Center Client** (launches the client)
4. Sign in to the Call Center Client using your Voice Manager credentials

Voice Administration - Dashboard

To access the Dashboard, from the Enterprise profile page select the (grp_) group from the **Group** dropdown. The following can be configured from the Dashboard:

- **Name**
- **Settings**

| Call Centers | | |
|------------------|--------------------|----------|
| Name | # | Settings |
| Herndon CC1 | 7034292785 (x2785) | |
| Herndon CC2 | 7034292786 (x2786) | |
| Seattle CC Queue | 2065084519 (x4519) | |
| VCT Lab CC Queue | 2065084533 (x4533) | |

Displaying 4 of 4 users

Call Center section (Dashboard)

Name

The name consists of the Name, CLID First and Last Name. To modify this information, enter the new information and click Save.

| Call Centers | | |
|--------------|---|----------|
| Name | # | Settings |
| Herndon CC1 | | |

Name

Name:

CLID First Name:

CLID Last Name:

Call Center Name page (Dashboard)

Settings

The following settings are available from the Dashboard:

- Group Policy
- Call Center Routing Policies
- Agent assignment
- Supervisor assignment

The screenshot displays the 'Call Center Settings' page for 'Herndon CC1' with extension '7034292785 (x2785)'. A gear icon in the top right is circled in blue. The page is divided into several sections:

- Group Policy:** Radio buttons for Circular, Regular, Simultaneous, **Uniform** (selected), and Weighted Call Distribution [Edit].
- Call Center Routing Policies:**
 - Overflow Action:**
 - Enable overflow after calls wait 30 seconds
 - Perform busy treatment
 - Transfer to phone number: [text box]
 - Play ringing until caller hangs up
- Agents:**
 - Available Users:** List of users including Yyle, Selma, Natl, Herndon CC Sup, Herndon CC Agent, Queen, Oliver, Jason, Navaschell, Todd, Ashley, Palacios, and Wayne, Bruce.
 - Assigned Users:** List of assigned users including Natl, Herndon CC Agent, and Herndon CC Agent Natl.
 - Buttons: Add >, < Remove, Add All >>, << Remove All, Move Up, Move Down.
- Supervisors:**
 - Available Supervisors:** List of supervisors including Nathan, Call, Caldwell, Brad, Forwarding Number, VCT-SEA, Forwarding Number, Herndon E, Jordan, Hal, Clark, Yyle, Selma, natl, VCT Main, Natl, Herndon Call, Natl, Herndon Employee, and Natl, Herndon CC Agent.
 - Assigned Supervisors:** List of assigned supervisors including Natl, Herndon CC Sup.
 - Buttons: Add >, < Remove, Add All >>, << Remove All.

At the bottom left are 'Save' and 'Cancel' buttons. At the bottom right is a 'Detailed Settings' link.

Call Center Settings page (Dashboard)

Group Policy

The Group Policy is the type of policy you wish to apply to your incoming calls.

Group Policy Definitions

- **Circular:** Incoming calls hunt through agents in the order they appear in the list, starting with the agent following the last agent to receive a call. When the search reaches the end of the list, it loops back to the top and continues until it has tried all agents.
- **Regular:** Incoming calls hunt through agents in the order they appear in the list, starting from the top each time.
- **Simultaneous:** Incoming calls alert all agents at the same time. The first agent to answer handles the call.
- **Uniform:** Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call.
- **Weighted Call Distribution:** Incoming calls are assigned to idle agents based on percentages you assign on the Hunt Group's Profile – Weighted Call Distribution page.

Call Center Routing Policies

The Call Center Routing Policies consists of Overflow actions such as enable overflow after a configurable number of rings, perform busy treatment, transfer to another phone number, or play ringing until the caller hangs up.

Assign Agents

Assign Agents to Call Center. See configuration below.

Assign Supervisors

Assign Supervisors to Call Center. See configuration below.

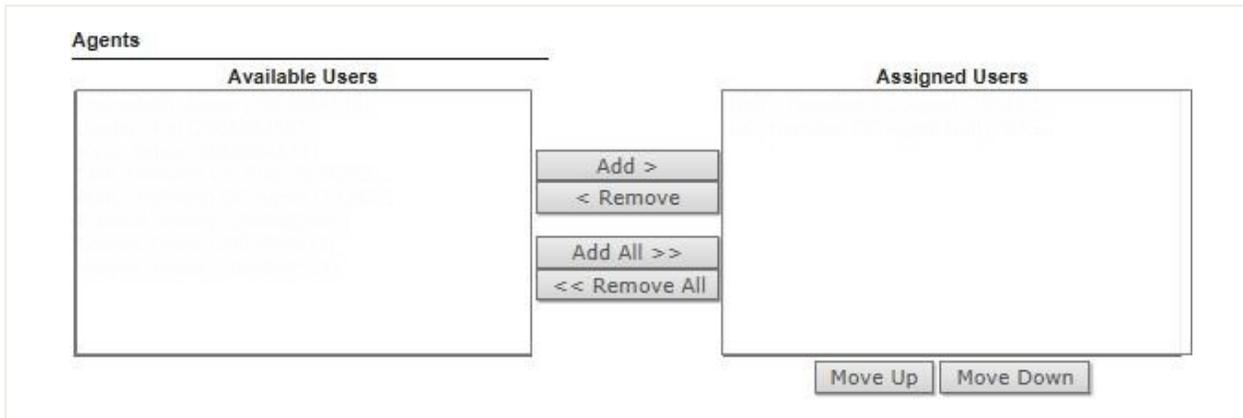
Agent Settings

Assign Agents to Call Center Queue (Voice Administration>Dashboard Settings or Group Services tab>Call Center Profile)

To assign Agents, select from the **Available Users**, and use the **Add >**, **Add All >>** buttons as desired to move Available Users to Assigned Users.

To remove Agents from Assigned Users, use the **< Remove**, **<< Remove All** buttons as desired to remove Assigned Users to Available Users.

You can also move Assigned Agents up and down in the Queue using the **Move Up** and **Move Down** buttons.



Assign Agents to Call Center

Note: Individual **User** settings must be updated for each **User** added. Follow these steps to manage Call Center Users.

Assign User to Call Center (Voice Administration>User>Calling Features>Call Control>Call Center Agent)

1. In the **User** dropdown, select the desired **Call Center User**.
2. On the **Calling Features** tab, locate the **Call Control** section. You can select Call Control from the Service type dropdown.
3. Locate **Call Center Agent** and click the **View Call Centers** button.
4. Select the **Join** checkbox next to the desired Call Center(s) the User will be a part of.
 - a. **Note:** this joins the User to the Call Center, but does not sign them in.
5. Click the **Save** button at the bottom of the page.
6. Scroll back to **Call Center Agent**, and on the **ACD State** dropdown, select the desired status: *Sign-In, Sign-Out, Available, Unavailable, Wrap-Up*.

Note: you can also set general Call Center settings for the agent by clicking **Edit**.

1. Click **Save**.



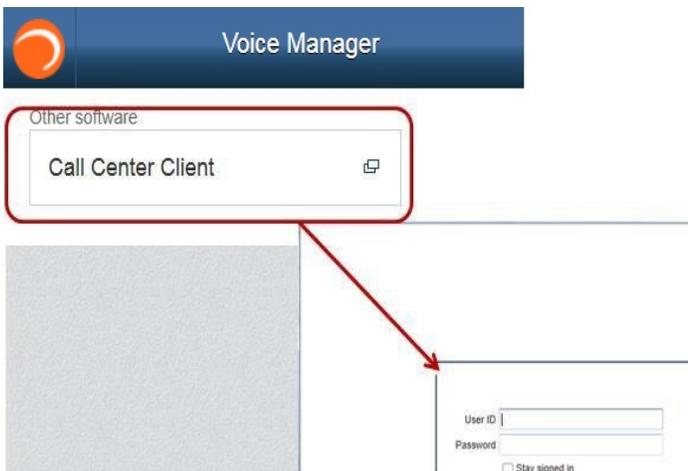
Assign User to Call Center

Activate a Queue for User (Voice Manager>Call Center Console>Settings>Application)

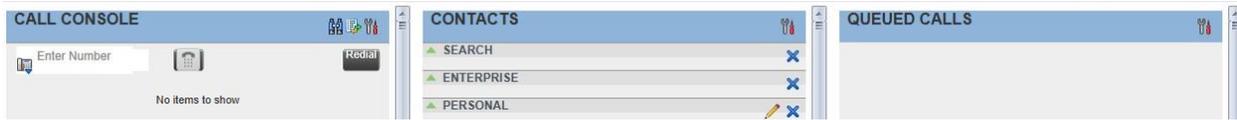
1. Log in to the Voice Manager
2. Click **Software**
3. Click **Call Center Client** to launch the application
4. Login with the same credentials as the Voice Manager
5. Click **Settings**
6. Click the **Application** tab
7. Select the desired **Queue**



Voice Manager Menu page



Call Center Client Sign In



Call Center Console



Call Center Settings - Application

Assign Agent to Supervisor (Voice Administration>User>Calling Features>Call Control>Call Center Supervisor)

Before you begin, verify the following:

- A Supervisor is assigned to a **Call Center Queue** (see below).

Once the step above is complete, follow the steps below:

1. In the **User** dropdown, select the desired **Call Center Supervisor**.



2. From the **Calling Features** Tab, locate the **Call Control** section. (Select Call Control from the Service type dropdown.)
3. In the **Call Control** section, find **Call Center Supervisor** and click the **View Call Centers** button.

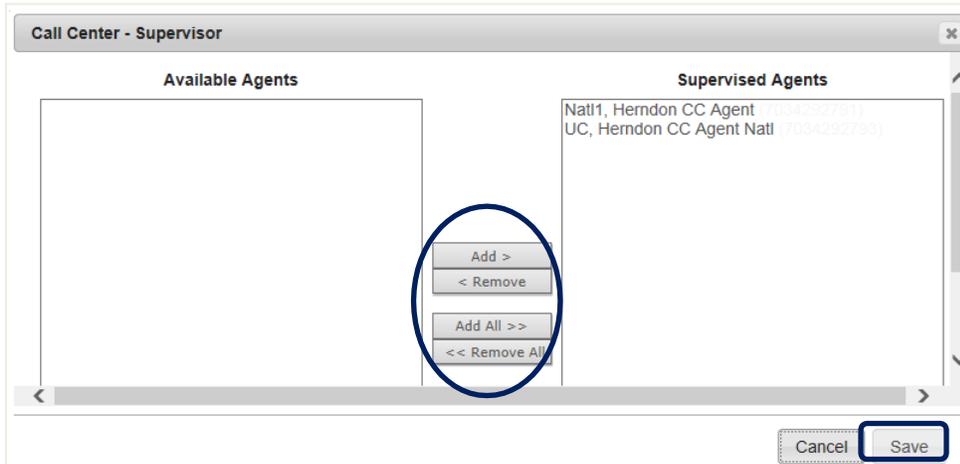


4. Click the **Edit** button next to desired **Call Center** (where the **Agent** and **Supervisor** are assigned).



Make changes as desired:

- a. **Add:** Select an **Available Agent** and click the **Add >** or **Add All >>** Button to be moved to the **Supervised Agents** column. In this example this step is complete.
- b. **Remove:** Select a **Supervised Agent** and click the **< Remove** or **<< Remove All** Button to be removed from Supervised Agents back to Available Agents.



Note: if you do not see the agent, they are not assigned to this queue. See notes above.

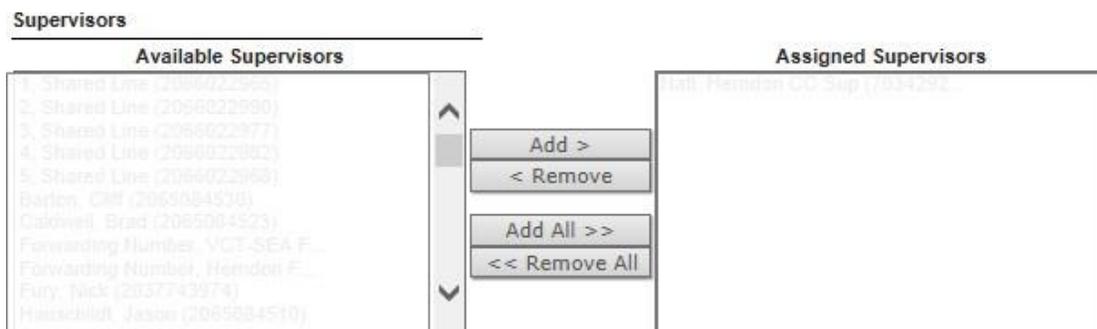
5. Click Save

Supervisor Settings

Assign Supervisor to Call Center Queue (Voice Administration>Dashboard Settings or Group Services tab>Call Center Profile)

To assign Supervisors to a Call Center, select from the Available Supervisors, and use the **Add >**, **Add All >>** buttons as desired to move Available Supervisors to Assigned Supervisors.

To remove Supervisors from Assigned Supervisors, use the **< Remove**, **<< Remove All** buttons as desired to remove Assigned Supervisors to Available Supervisors.



Assign Supervisor to Call Center Queue

Email Reporting

1. Select the (**grp_**) group in the Group dropdown
2. Click the **Group Services** tab
3. Click **Call Centers** in the left menu
4. Select a Call Center from the dropdown
5. Click **Edit** next to Statistics
6. Select from 30 or 60 minute reporting period. The default is 30 minutes
7. Enter email address(es)
8. Click **Save** to save the Statistics updates
9. Click **Save** on the Profile page to save your changes

Profile

Profile Settings

Call Center ID: cc_6939570 Phone Number: 1
 Call Center Type: Standard Extension: 4533
 * Name:

Calling Line ID
 * Last Name: * First Name:

Department:
 Language:
 Time Zone:

Group Policy: Circular Regular Simultaneous Uniform Weighted Call Distribution

Statistics:

Call Center Profile page

Statistics

Daily Report

Statistic Source:

Reporting Period:

E-mail Address(es):

Call Center Statistics page