



Cloud Contact Center

User Guide

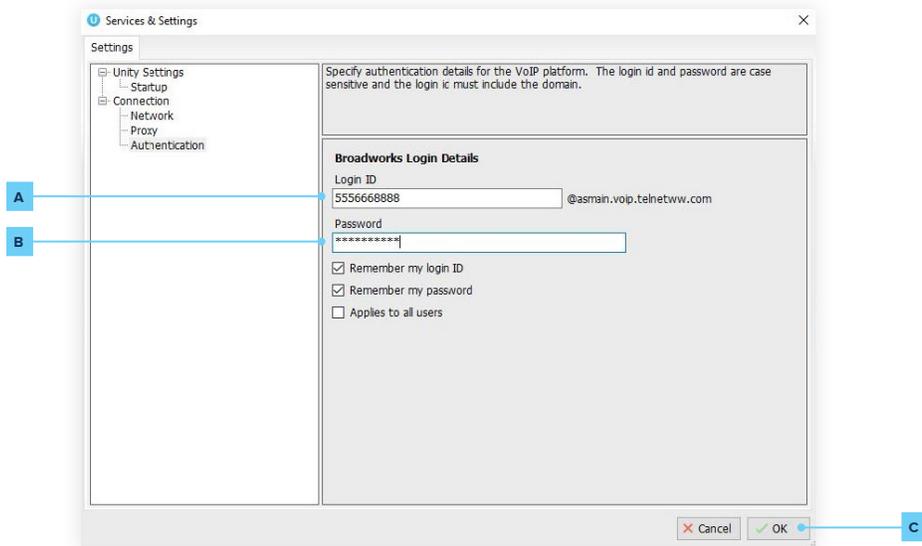
Table of Contents

Contact Center Apps - Installation	2
Webex Desktop App.....	5
Yealink T54W Desk Phone Agent Access	7
Polycom VVX Phone Agent Access	10
Agent Initial Login via Phone	10
Change Agent State via Phone.....	10
Change Agent State to Unavailable	10
Change Agent State from Unavailable to Available	10
Agent Logout via Phone	10
Tag ACD Call with Disposition Codes	11
Agent App Overview	12
Supervisor App Overview	13
Supervisor App Reporting.....	14
Supervisor App Daily Emailed Reports.....	15

NOTE: Open this interactive PDF in Adobe Reader or Adobe Acrobat for optimal functionality.

Contact Center Apps - Installation

1. Install application
 - a. Contact system administrator for software
2. Launch application
 - a. Double click “Unity Client” icon from desktop
3. Add user login information
 - a. Click Authentication node
 - b. In **Login ID** **A** field, Enter 10-digit user phone number
 - c. In **Password** **B** field, Enter web password provided by system administrator
 - d. Press **OK** **C** at bottom right of screen (press **Yes** if prompted to restart)

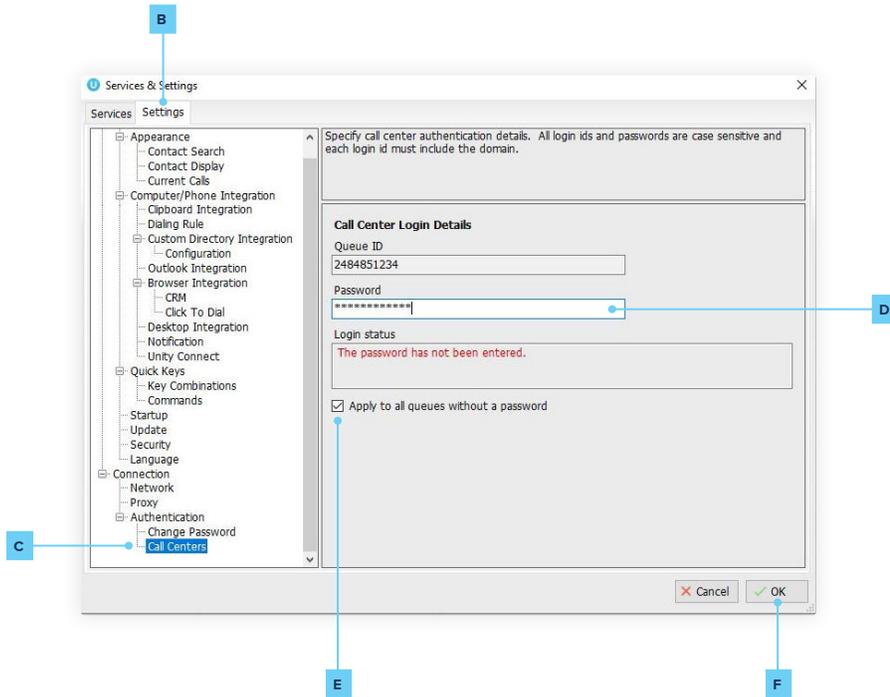


4. The **Settings** **A** menu is also accessible from settings button (near top right of application):



Contact Center Apps - Installation

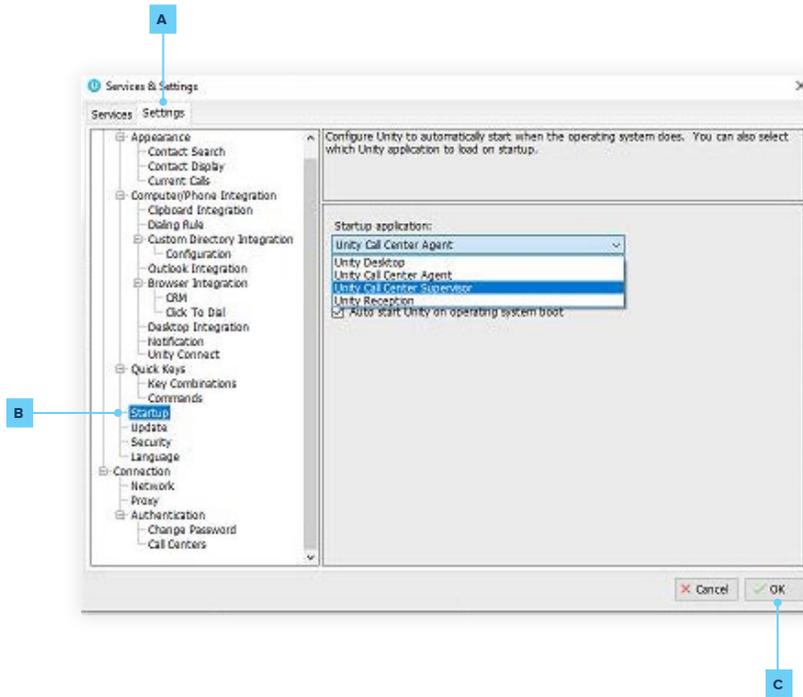
5. Press **Settings** **A** button
6. Press **Settings** **B** tab
7. Click on **Call Centers** **C** in tree view
8. Double click on desired call center queue
9. Enter call center/queue **password** **D**
10. Select/enable the **“Apply to all queues without password”** **E** checkbox
11. Press **OK** **F** at bottom right and press **OK** again (press **Yes** if prompted to restart)
12. This completes the user setup



Contact Center Apps - Installation

NOTE

- If a user is licensed as both an agent answering calls and a supervisor, use the supervisor app
 - As a user, Press **Settings** button > **Settings A** tab > **Startup B** (in tree view)
 - Depending on role, select Unity Call Center Agent (to accept calls) or Unity Call Center Supervisor (for additional supervisor reporting).
 - Press **OK C** at bottom right, select **Yes** if prompted to restart



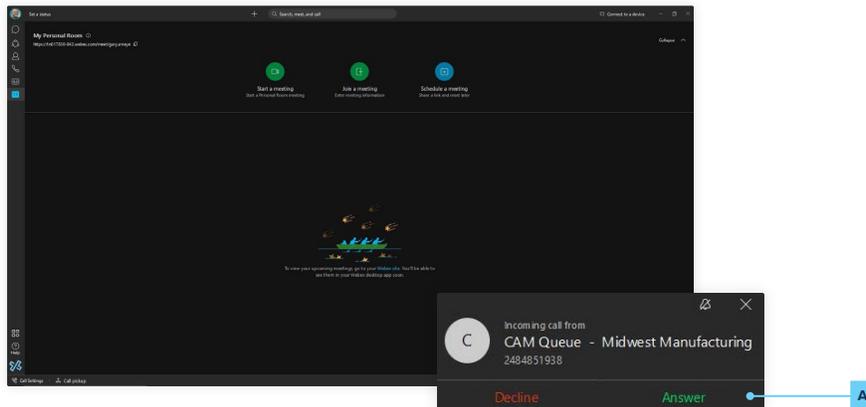
Webex Desktop App

Download and Install Software

- [Webex Desktop App - Software Download](#)
- Login with email address and web password

After initial login, agent status is automatically set to **Available**. If current status is not set to **Available**, it can be changed (see details below). Incoming calls will be delivered to agent based on call routing policy defined by your system administrator.

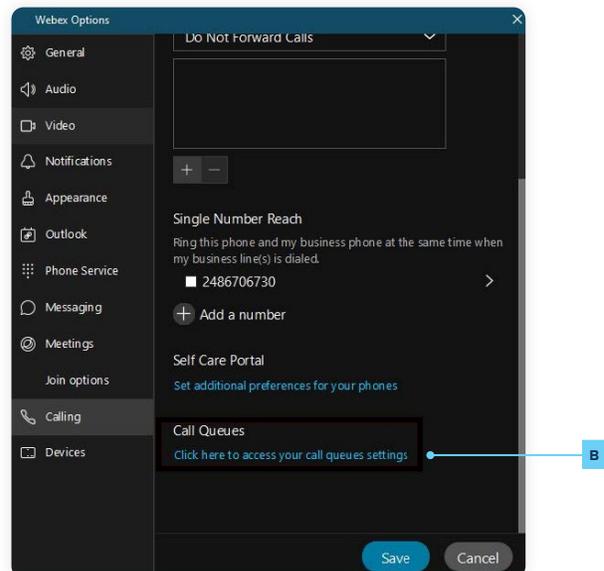
Incoming call from queue is presented via screen pop at bottom right corner of app (shows caller name & number) and can be answered by agent (click [Answer](#) **A**):



After agent answers call from contact center queue and later ends the call, the app will automatically be placed in **Wrap up** mode where no new calls will be presented to the agent (temporarily). This gives the agent a brief period of time to wrap up details of the call (capture notes, catch breath and get ready for the next call). After wrap up time is complete, new calls from the queue will be presented. The wrap up time is configurable and is typically 30 to 60 seconds in length. The availability setting automatically changes to indicate that wrap up mode is enabled. An agent can override this mode at anytime by simply changing their status to **Available**

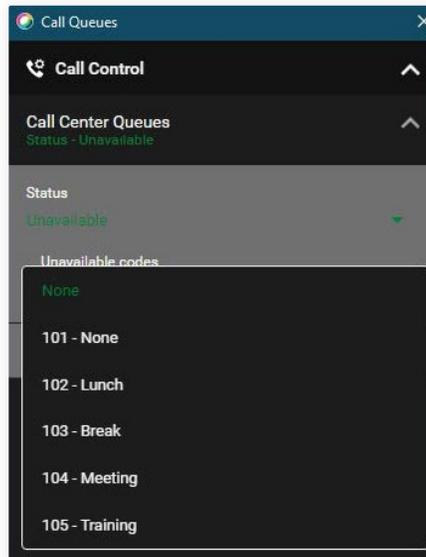
Agent can change availability state within the webex app:

1. Click [Call Settings](#) (near bottom left corner of webex app)>Open [Call Preferences](#).
2. Scroll to bottom and click on link below [Call Queues](#) **B**

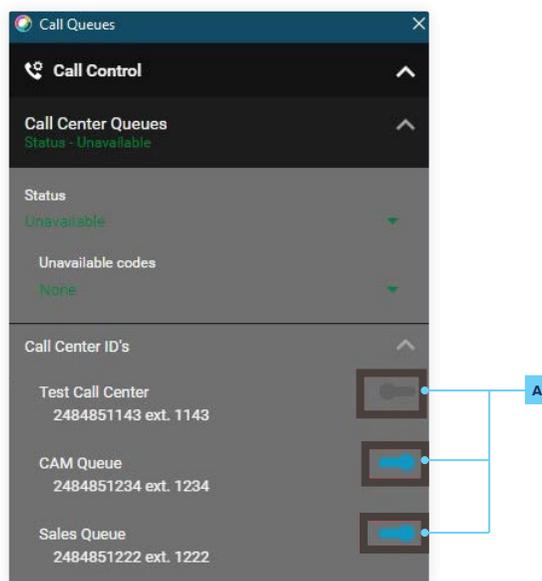


Webex Desktop App

Click on the **Call Control** pulldown and then click **Call Center Queues**. Select the desired availability. If selecting Unavailable, a reason code must also be selected (Meeting, Training, etc). Unavailable codes are provided to contact center supervisors via reporting.



Within the same interface, an agent can select which queues they are able to receive calls from. Click Call Center ID's and then click the corresponding control to **enable** or **disable** **A** receiving of calls from queue.



Yealink T54W Desk Phone | Agent Access

A system tag must be enabled to display the agent call center options below. Contact your system administrator to enable these.

Agent Login - Agent presses the **Login** **A** button directly on the phone. After login, agent status is set to **Available** and incoming calls from the call center queue are presented to the agent.



After initial login, agent status is automatically set to **Available**. Incoming calls will be delivered to agent based on call routing policy defined by your system administrator.



Yealink T54W Desk Phone | Agent Access

After agent answers call from contact center queue and later ends the call, the phone will automatically be placed in **Wrap up** mode where no new calls will be presented to the agent. This gives the Agent a brief period of time to wrap up details of the call, catch breath and get ready for the next call. After wrap up is complete, new calls from the queue will be presented. The wrap up time is configurable and is typically 30 to 60 seconds in length. The phone icon automatically changes to indicate that wrap up mode is enabled. An agent can override this mode at anytime by simply changing their status to **Available**



Press the **Unavail** A softkey if agent is not available to handle incoming calls from the queue.



Yealink T54W Desk Phone | Agent Access

Add the Unavailable Reason Code. These are codes that are entered by agent to describe why the agent is not available to take calls from the queue. Default examples include: None, Lunch, Break, Meeting and Training. These codes are provided to supervisors via call center reports. System administrators can modify existing unavailable codes or add additional unavailable codes if needed.

Unavailable Reason Code

1. Enter code:	
2. 101:None	
3. 102:Lunch	
4. 103:Break	
5. 104:Meeting	

Back
123
Delete
OK

Disposition Codes are entered by agents immediately following a completed call and used to indicate the general nature of the call. Press the **DispCode** A button after the call is complete and then select or enter the desired code followed by OK. Default examples include: new order, change order, cancellation, product questions, warranty issue, sales inquiry and billing issue. These codes are provided to supervisors via call center reports. System administrators can modify existing disposition codes or add additional disposition codes if needed. Disposition Codes are optional - contact your supervisor or sys admin for more information.

Jake Smith 24
2:54 PM Mon, May 03

1236

1236

1236

VM Tra...

Paging

Available

Unavail
Logout
DispCode

Disposition Code

1. Enter code:	
2. 201:	new order
3. 202:	change order
4. 203:	cancellation
5. 204:	product questions

Back
123
Delete
OK

Polycom VVX Phone | Agent Access

Agent Initial Login via Phone

To login to queues:

1. Press **More** softkey
2. Press **More** softkey again (not required for VVX500)
3. Press **ASignIn** softkey

The agent availability state is automatically set to Available. You will be automatically logged into all queues that have been assigned to you and can begin receiving calls from the queue. An agent visual status indicator will appear next to the line key. Contact your system administrator to be added or removed from queues.

Change Agent State via Phone

After completing the initial login step above, you can change your state at any time to available or unavailable depending on your availability to receive calls from any queue.

Change Agent State to Unavailable

After agents are logged in, their availability state is automatically set to Available. The availability state can be changed to unavailable:

1. Press **More** softkey
2. Press **More** softkey again (not required for VVX500)
3. Press **Unavailable** softkey to not receive calls from queue(s)
4. Select desired unavailable code from list (use up/down navigation arrows to select desired code and press Select softkey)

The agent icon displayed on the phone will update automatically to indicate the unavailable state.

Change Agent State from Unavailable to Available

If agent state is currently set to unavailable, they can become available again as follows:

1. Press **More** softkey
2. Press **More** softkey again (not required for VVX500)
3. Press **Available** softkey to receive calls from queue(s)

The agent icon displayed on phone will update automatically to indicate the available state.

Agent Logout via Phone

If agent is currently logged in, they can logout as follows:

4. Press **More** softkey
5. Press **More** softkey again (not required for VVX500)
6. Press **ASignOut** softkey to completely log out of all queues.

The agent icon displayed on phone will update automatically to indicate the agent is signed out.

Agent State	Line Icon for VVX 300/310	Line Icon for VVX 400/410, VVX 500	Description
Sign Out			Indicates an agent is not using the ACD feature. Calls will not be directed to the agent.
Sign In, Available			Indicates an agent is available to take calls. Calls will be directed to the agent.
Sign In, Unavailable			Indicates an agent is unavailable to take calls. Calls will not be directed to the agent.
Wrap-up			Indicates an agent has just finished a call and is doing post-call work. Calls will not be directed to the agent.

Polycom VVX Phone | Agent Access

Tag ACD Call with Disposition Codes

To assign disposition codes to a current call via phone softkeys:

1. Press **More, More, Disp Code** softkeys
2. Enter the disposition code and press **Enter**
3. The system does not respond with an announcement while you are on an active call.

To assign disposition codes via phone softkeys in Wrap-Up mode:

1. Press **More, More, More, Disp Code**
2. Enter the disposition code and press Enter
3. The system will respond with “disposition code accepted”. If not, you have not entered a valid disposition code.

NOTE

- More than one disposition code can be assigned to a call.

Agent App | Overview

Set Availability State | **Call Control** | **Setup & Preferences** | **Queue Statistics**

Active and held calls
Other calls in queue
(double click to toggle between calls)

Company Directory

Call Logs

Visual Voicemail

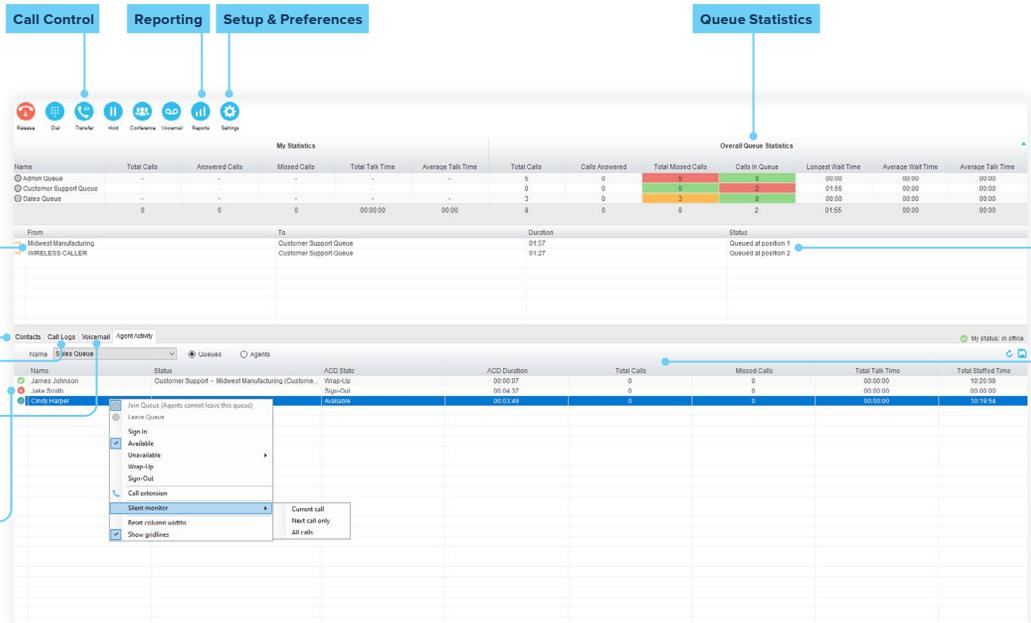
Call Status

My Statistics					Overall Queue Statistics							
Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Admin Queue	2	0	2	00:00:00	00:00	5	0	0	0	00:00	00:00	00:00
Customer Support Queue	10	0	10	00:00:00	00:00	4	1	3	1	00:04	00:01	00:03
Sales Queue	2	0	2	00:00:00	00:00	4	0	4	2	02:00	00:00	00:00
	22	0	22	00:00:00	00:00	12	1	12	3	02:00	00:01	00:02

From	To	Duration	Status
Queued			
Midwest Manufacturing (+12484951938)	Sales Queue	02:11	Queued at position 1
WIRELESS CALLER	Sales Queue	01:57	Queued at position 2
WIRELESS CALLER (+12487057410)	Customer Support Queue	00:03	Queued at position 1 - previously abandoned - entrance message playing

Call Date	Phone Number	Name
Recent		
5/11/2021 10:52:19 AM	+12484951938	Customer support - Midwest Manufacturing (Customer Support Queue)
5/11/2021 10:30:35 AM	2484951938	Midwest Manufacturing
5/11/2021 10:30:06 AM	2484951938	Midwest Manufacturing
5/11/2021 10:27:39 AM	2484951938	Midwest Manufacturing
5/11/2021 10:27:05 AM	2484951938	Midwest Manufacturing
5/11/2021 10:26:16 AM	2484951938	WIRELESS CALLER
5/11/2021 10:26:09 AM	2484951938	WIRELESS CALLER
5/11/2021 10:25:35 AM	2484951938	Midwest Manufacturing
5/11/2021 10:25:06 AM	2484951938	Midwest Manufacturing
5/11/2021 10:24:39 AM	2484951938	Midwest Manufacturing
5/11/2021 10:24:09 AM	2484951938	Midwest Manufacturing
5/11/2021 10:23:35 AM	2484951938	Midwest Manufacturing
5/11/2021 10:23:06 AM	2484951938	Midwest Manufacturing
5/11/2021 10:22:39 AM	2484951938	Midwest Manufacturing
5/11/2021 10:22:06 AM	2484951938	Midwest Manufacturing
5/11/2021 10:21:39 AM	2484951938	WIRELESS CALLER
5/11/2021 10:21:06 AM	2484951938	WIRELESS CALLER

Supervisor App | Overview



Call Control | **Reporting** | **Setup & Preferences** | **Queue Statistics**

My Statistics

Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time	Total Calls	Calls Answered	Total Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Admin Queue	-	-	-	-	-	0	0	0	0	0:00	0:00	0:00
Customer Support Queue	-	-	-	-	-	0	0	0	2	0:55	0:00	0:00
Other Queue	-	-	-	-	-	3	0	3	0	0:20	0:00	0:00
	0	0	0	00:00:00	0:00	3	0	3	2	0:55	0:00	0:00

Overall Queue Statistics

From: Midwest Manufacturing WIRELESS CALLER To: Customer Support Queue Customer Support Queue Duration: 01:57 01:27 Status: Queued at position 1 Queued at position 2

Company Directory | **Call Logs** | **Visual Voicemail** | **Agent Metrics**

Availability state for other agents that are handling calls

Name	Status	ACD State	ACD Duration	Total Calls	Missed Calls	Total Talk Time	Total Staffed Time
James Johnson	Customer Support - Midwest Manufacturing (Customer Support - Midwest Manufacturing)	Wrap-Up	00:00:07	0	0	00:00:00	10:25:08
Jake Smith	Customer Support - Midwest Manufacturing (Customer Support - Midwest Manufacturing)	Wrap-Up	00:00:37	0	0	00:00:00	00:00:00
Chris Harper	Customer Support - Midwest Manufacturing (Customer Support - Midwest Manufacturing)	Available	00:01:49	0	0	00:00:00	10:19:54

Supervisor App | Reporting

Reporting

Report Viewer

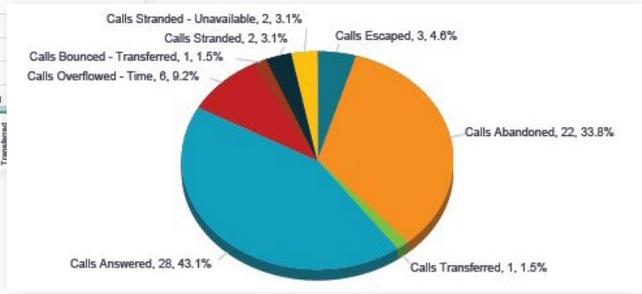
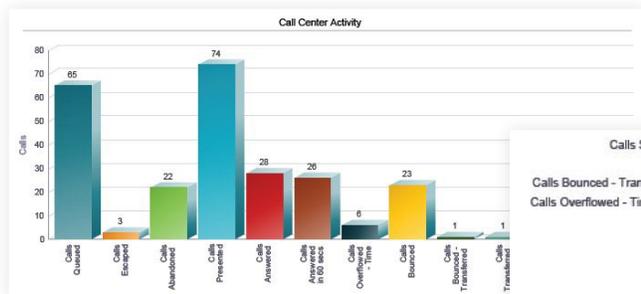
- Abandoned Call Report
- Abandoned Call Report
- Agent Activity Detail Report
- Agent Activity Report
- Agent Call By SID Report
- Agent Call Detail Report
- Agent Call Transfer Report
- Agent Disposition Code Report
- Agent Duration by SID Report
- Agent Duration Report
- Agent Sign In/Sign Out Report
- Agent Summary Report
- Agent Unavailability Report
- Call Center Call Detail Report
- Call Center Disposition Code Report
- Call Center Incoming Calls Report
- Call Center Overflow History Report
- Call Center Presented Calls Report
- Call Center Report
- Call Center Summary Report
- Service Level Report

My Statistics

Name	Total Calls	Answered Calls	Missed Calls	Total Talk Time	Average Talk Time
Admin Queue	5	0	5	0:00	0:00
Customer Support Queue	0	0	0	0:00	0:00
Sales Queue	4	0	4	0:00	0:00

Overall Queue Statistics

Total Calls	Calls Answered	Total Missed Calls	Calls in Queue	Longest Wait Time	Average Wait Time	Average Talk Time
5	0	5	0	0:00	0:00	0:00
0	0	0	0	0:00	0:00	0:00
4	0	4	0	0:00	0:00	0:00
0	0	0	2	0:43	0:00	0:00



Call Date Time	Call Agent Time	Call Env Time	Agent Name	Agent Number (Extension)	Agent Ext Level	Call Status	Call Reason	Call Agent	Wait Time	Transfer Number	Number of Buckets	Bucket Transfer Number	Talk Time	Hold Time	Wrap Up Time	Agent Transfer Number	Disposition Code
00:09:38.00:34:30	00:09:38.00:34:30	00:09:38.00:34:30	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:37	0	00:00:47	00:00:05	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:34:40	00:09:38.00:34:40	00:09:38.00:34:40	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:35	0	00:00:15	00:00:04	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:34:50	00:09:38.00:34:50	00:09:38.00:34:50	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:28	0	00:00:09	00:00:04	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:34:58	00:09:38.00:34:58	00:09:38.00:34:58	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:28	1	00:01:26	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:35:08	00:09:38.00:35:08	00:09:38.00:35:08	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:28	4	00:02:04	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:35:18	00:09:38.00:35:18	00:09:38.00:35:18	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:28	0	00:00:07	00:01:04	00:00:11	00:00:00	00:00:00	00:00:11	00:00:00	00:00:11
00:09:38.00:35:28	00:09:38.00:35:28	00:09:38.00:35:28	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:28	0	00:00:12	00:01:07	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:35:38	00:09:38.00:35:38	00:09:38.00:35:38	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	0	00:00:02	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:35:48	00:09:38.00:35:48	00:09:38.00:35:48	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	0	00:00:01	00:00:15	00:00:15	00:00:00	00:00:00	00:00:15	00:00:00	00:00:15
00:09:38.00:35:58	00:09:38.00:35:58	00:09:38.00:35:58	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	0	00:00:15	00:01:10	00:00:00	00:00:00	00:00:00	00:01:10	00:00:00	00:00:00
00:09:38.00:36:08	00:09:38.00:36:08	00:09:38.00:36:08	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	0	00:00:07	00:00:02	00:00:00	00:00:00	00:00:00	00:00:02	00:00:00	00:00:00
00:09:38.00:36:18	00:09:38.00:36:18	00:09:38.00:36:18	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	4	00:00:16	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:36:28	00:09:38.00:36:28	00:09:38.00:36:28	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	12	00:00:19	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:36:38	00:09:38.00:36:38	00:09:38.00:36:38	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	1	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:36:48	00:09:38.00:36:48	00:09:38.00:36:48	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	2	00:00:04	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:36:58	00:09:38.00:36:58	00:09:38.00:36:58	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	1	00:00:00	00:01:21	00:00:00	00:00:00	00:00:00	00:01:21	00:00:00	00:00:00
00:09:38.00:37:08	00:09:38.00:37:08	00:09:38.00:37:08	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	0	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
00:09:38.00:37:18	00:09:38.00:37:18	00:09:38.00:37:18	1902_joe	+1346471903 ext. 1903	0	346471903	Answered	30:09:05	0	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00

Supervisor App | Daily Emailed Reports

agent name	num. calls handled	num. calls unanswered	avg. call time	total talk time	total staffed time
Agent 1	20	206	0:04:25	1:13:09	24:00:00
Agent 2	0	0	0:00:00	0:00:00	0:00:00
Agent 3	8	239	0:04:44	0:36:18	24:00:00
Agent 4	2	314	0:10:17	0:20:12	24:00:00
Agent 5	0	282	0:00:00	0:00:00	24:00:00

timestamp	num. busy overflows	num. calls answered	num. calls abandoned	num. calls transferred	num. calls timed out	avg. num. agents talking	avg. num. agents staffed	avg. wait time	avg. abandonment time
May 19 2021 7:30:00 AM	0	2	0	0	0	0.3	9	0:00:04	0:00:00
May 19 2021 8:00:00 AM	0	10	0	0	0	0.9	11	0:00:19	0:00:00
May 19 2021 8:30:00 AM	0	13	0	0	0	1.7	11.7	0:00:53	0:00:00
May 19 2021 9:00:00 AM	0	16	1	0	0	2	10	0:00:18	0:00:38
May 19 2021 9:30:00 AM	0	18	0	0	0	1.2	10	0:00:12	0:00:00
May 19 2021 10:00:00 AM	0	22	2	0	0	3	11	0:00:25	0:01:23
May 19 2021 10:30:00 AM	0	15	0	0	0	1.7	12	0:00:09	0:00:00
May 19 2021 11:00:00 AM	0	15	0	0	0	1.2	12	0:00:12	0:00:00
May 19 2021 11:30:00 AM	0	16	1	0	0	1	12	0:00:08	0:00:04
May 19 2021 12:00:00 PM	0	9	0	0	0	0.9	12	0:00:16	0:00:00
May 19 2021 12:30:00 PM	0	17	0	0	0	1.6	12	0:00:09	0:00:00
May 19 2021 1:00:00 PM	0	11	0	0	0	1.4	12	0:00:12	0:00:00
May 19 2021 1:30:00 PM	0	9	0	0	0	0.8	12	0:00:05	0:00:00
May 19 2021 2:00:00 PM	0	16	0	0	0	1.1	12	0:00:12	0:00:00
May 19 2021 2:30:00 PM	0	12	0	0	0	0.6	12	0:00:10	0:00:00
May 19 2021 3:00:00 PM	0	19	0	0	0	1.6	12	0:00:09	0:00:00
May 19 2021 3:30:00 PM	0	15	1	0	0	1.6	12	0:00:06	0:00:02
May 19 2021 4:00:00 PM	0	12	0	0	0	0.9	12	0:00:27	0:00:00
May 19 2021 4:30:00 PM	0	9	1	0	0	0.9	12	0:00:17	0:00:57
May 19 2021 5:00:00 PM	0	7	0	0	0	0.9	12	0:00:18	0:00:00
May 19 2021 5:30:00 PM	0	8	0	0	0	0.6	12	0:00:11	0:00:00
May 19 2021 6:00:00 PM	0	8	1	0	0	0.8	12	0:00:25	0:00:06