# Contact Centre Manual Installation and User guide

Specifications are subject to change without notice.

Facilities described may or may not be supported by your network. Opera Cloud, Opera 240, Opera 20, and Operafone are the registered trademark of MDS Gateways.

This documentation refers to: Opera Software Version 14.097 or later.

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# 1.Introduction

The Opera Cloud PBX and the Opera 240 hardware PBX have an Integrated Contact Centre which is enabled by licence key.

The Contact Centre options on the system are typically used in companies which have a group of people working together, for example:

Tele-Sales Service Calls Reservations An Order Desk Multiple Receptionists

or in any situation where a group of employees need to operate effectively as a team handling calls of a similar nature in a Work Group.

The Contact Centre offers advanced features that allow businesses to provide a professional level of service to inbound customer callers:

- 240 Agents
- 20 Skill sets
- 100 Announcements
- Call Transfer and Overflow
- Agent and Supervisor Log In/Log Out
- Agent Wrap-up time
- Queue Status Wallboards
- Agent Priority on Skill level
- Skill set Mailboxes
- Agent and Skill set reports

Incoming calls to a skill set pool of agents may be:

- Routed on a dedicated inbound number destined to that skill set
- Transferred to another skill set or the Operator
- Queued on the Auto-Attendant

### **Call Distribution**

Calls presented to a skill set pool may be distributed in a number of ways

- Ring All: The incoming call is offered to all members of the skill set simultaneously
- **Cyclic Start**: The incoming call is presented to an agent and if not answered moves around the other agents in a cycle. The starting agent in the cycle is also rotated.

- **Priority Routing**: The incoming call is always offered to the first member of the skill set pool, then to the second member, then to the third and so on. Agents can be ranked in the skill set pool in ascending order of skill so that calls are offered to the lower skill sets first.
- Longest Idle: calls are first offered to the longest idle agent.
- Longest Idle Internal: calls are first offered to the agent who has been idle the longest, based on internal calls only
- Longest Idle External: calls are first offered to the agent who has been idle the longest, based on external calls only.

### Call Queuing, Auto-Attendant and Voice Mail

Incoming callers can be routed to the appropriate skill set based on the number they have dialled. They are offered a menu of choices to further route the call to the appropriate agent and the system can play messages while they are queued waiting for an agent.

For example a typical message could be: "Thank you for calling, an operator will answer your call shortly, alternatively dial 5 for Sales, dial 6 for Service, dial 7 for Transport or hold for the operator"

The call is then routed to the relevant skill set. This significantly reduces call congestion and workload on operators.

### **Call Overflow**

When a pool of agents is fully occupied with calls, new incoming calls may be overflowed to a different skill set pool or to voicemail or to an external destination. Overflow can be triggered when a call waiting threshold is exceeded.

### Agent Login / Logout

Agents can Login and Out of Contact Centre Pools freely, typically for start/end of shift. There are many ways to do this:

- One touch toggle key on the system phone.
- Menu option on the system phone.
- Simple easy toggle option on the portal page.
- A dialling code on an analogue phone
- By Supervisor using web portal

### Handling Traffic Peaks

Agents may Log-in to other skill sets during peak times to provide additional assistance in a busy skill set. This facilitates call handling during periods when particular skill sets carry a heavier load at specific times of the day. Supervisors can also login agents, using the drag & drop portal interface.

Wrap-up Time

DM 1069 Rev 2

At the end of a call, an agent will typically require a few minutes to complete actions such as processing orders, or writing up notes of the call. Each Agent can be assigned an individual wrap-up time by the supervisor.

### Last Agent Log-Out

While Agents can Log into and out of a skill set freely, the system must take action if all agents log out, so that the skill set pool is not left unattended. In this event the calls are forwarded to a pre-defined destination.

### Wallboard Supervisor Overview and Control using Web Portal

The skill set Supervisor has full control over the skill set pool, and can react to levels of calls into the skill set by adding agents using a simple drag and drop interface.

- Live status over-view of the skill set and all its agents.
- Reports regarding the performance of the skill set and its agents
- Quickly add, remove, login, logout using drag & drop portal interface
- Adding a message to the wall display.
- Call Record (can be emailed to Agent and Supervisor as wav file)
- Live listen-in, (Supervisor can connect into an agent call, silently, but can un-mute if needed
- Supervisor takeover of a call from an agent

Several logins to the skill set web portal are possible, allowing for more than one supervisor over-seeing and controlling the skill set pool.

### **Skill set Reporting**

The skill set supervisor can generate reports based on over-all skill set statistics and on a per agent basis, also allowing the option to set a date/time window for such reports as:

- Longest/ average wait times
- Longest/ average call times
- Max number of calls
- Number of call per day
- No of abandoned calls
- Agent League table

These reports can be viewed on the browser screen, printed out or saved as a file. Also the raw data may be exported to allow further analysis.

### Wall Displays

Live wall displays give real time performance for each skill set pool. Statistics are continuously updated for call queues, answered calls, abandoned calls, calls answered by voicemail, calls forwarded to other skill sets.

For an individual agent, statistics such as average call length, longest call, and idle time can be displayed.

# 2. Setting-up the Contact Centre

# 2.1. Names for the Skill Sets

The contact centre contains 20 skill sets of agents. Each skill set has a number and name and you should change the name to describe the skill set. Examples could be 'Sales Campaign 820' or 'Sales Standard 821'. You may change the names and numbers by clicking on the links "Skill Set Numbers' and 'Skill Set Names', filling in the white fields and pressing 'Save'.

System Settings	User Settings		External Numbers	✓ IP Settings ✓
Time Settings Day/Night Ringing Day/Night Switch Times	Group Settings     Group Numbers     Group Names		External Number List Names for External Numbers Ringing Assignment Ringing Cadences External No. Call Restriction Country / Area Code	IP Addresses Port Numbers SMTP Configuration CIFS Configuration FTP Configuration CTI Servcie
Set Time Zone Automatic Maintenance Time Miscellaneous Timers LCR Timing Modes Alarm Call Details Fewer Links	Group Assignment Group Attributes Faliback to Operator		SIP Trunks	SOAP Service DiffServ Whitelist (RAS) IP addresses Firewall Fewer Links
			Trunk Settings Trunk Access Codes Trunk Access Priority PBX Lines	Call Logging  Service Settings Call log Call History Call Quality Statistics
			Access Control	Download Call Log     Clear Call Logging
		<	Skillset Skillset Names	▼
			Skillset Attributes Fallback to Operator All Wall Displays Wall Username & Password External number priority Skillset Report Fewer Links	

Group	Name
820	Sales Campaign 820
821	Sales Standard 821
822	Support Team 822
823	Skill set 823
824	Skill set 824
825	Team 825
826	Team 826
827	Team 827
828	Call Centre 828
829	Call Centre 829
830	Call Centre 830
831	Call Centre 831
832	Call Centre 832
833	Call Centre 833
834	Call Centre 834
835	Call Centre 835
836	Call Centre 836
837	Call Centre 837
838	Call Centre 838
839	Call Centre 839

# 2.2. Assign Agents to the Skill Set

The number of agents licensed in the Contact Centre is indicated on the System properties page:

Home	System Properties	Help
		bluefaceit [inst:66-dist:3530001-pbxld:13-t:0]
	Software Version Number :	15.010 (UN)
	Running Time:	0 Day(s) 03:22:16
	Number of IP system phone users	15
	Call Centre Users	15
	Number of Sir Trunks.	U
	Number of VoIP Networking Channels:	
	Auto-Attendant	Advanced - 100
	CSTA	Basic
	Remote Office	
	Meet-Me Conferencing	Enabled
	Call Record Channel	
	Voicemail Details	
	- Num Mailboxes :	1023
	- Used (Mins) :	
	- Voice Messages	

To assign the agents to a skill set, click on the 'Skill set Assignment' link, to display a list of all the pools. Click on the Edit button of the Skill set you wish to populate with agents.

Group	Name	Members	Edit
820	Sales Campaign 820	104,105,106,103	
821	Sales Standard 821	104,105,108,103,106,109	
822	Support Team 822	106,102,104,105,107,101	
823	Skillset 823		
824	Skillset 824		1
825	Team 825		
826	Team 826		
827	Team 827		
828	Skillset 828		
829	Skillset 829		
830	Skillset 830		
831	Skillset 831		
832	Skillset 832		
833	Skillset 833		
834	Skillset 834		
835	Skillset 835		
836	Skillset 836		
837	Skillset 837		
838	Skillset 838		
839	Skillset 839		
	1		

On the Edit page for the skill set, you may add or remove agents from the skill set pool by dragging and dropping agents into the centre column as shown below. You can also select an Auto Attendant message for the skill set by clicking on the + sign underneath 'Auto-Attendant'. This message is played to callers who are queued for the skill set. The playing of the message along with the programming of any interactive response is programmed on the Auto-Attendant programming page.

Home		Skillset Assignment		н	elp
		Group Assignment - G	roup : Sales		
	Add All	4 Assignment	Remove All	Select Auto-Attendant	
	Declan Gibbons (1050) +	<b>‡</b> Agent 137 (137)	-	None +	
	Dave Victory (1009) +	<b>‡</b> Fred Liu (135)	-		
	Gary Marjoram (1007) +	\$ Steve Lawley (136)	-		
	Gary Nolan (1043) +	\$ Seamus Doran (1041)	-		
	Sean Cleary old desk (104)			Select Networked User or	
	Patch (1096) +			Group	
	Andrea Hartigan (1030) +			+	
	John Harper (1048) +			<b>T</b>	
	Fax Test 1088 (1088) +				
	Dave Shaw (1046) +				
	Kevin Doherty (1002) +				
	DMaj Main (1095) +				
	Kevin Kenny 2 (114) +				
	John Manning1 (1081) +				
	Aidan Walters (1023) +				
	Paul Hickey (1059) +				
	Michael Collins (1040) +				
	Kevin Kenny 3 (119) +				
	Tom Hand (1025) +				
	Extn 121 (121) +		_		
		. —			

Note:

The Opera 240 hardware IPPBX may be networked together with other Opera 240 IPPBX systems at remote sites. In this case, an additional option to allow inclusion of remote networked users within the skill set may be shown on this page, 'Select Networked User or Group'.

# 2.3. Select the type of Call Distribution for the Skill set

On the 'Skill set Attributes' page, you can choose how calls are distributed to the agents in the skill set group.

- **Ring All:** The incoming call is offered to all members of the skill set simultaneously
- **Cyclic Start**: The incoming call is presented to an agent and if not answered moves around the other agents in a cycle. The starting pointed the cycle is also rotated.
- **Priority Routing**: The incoming call is always offered to the first member of the skill set pool, then to the second member, then to the third and so on. Agents can be ranked in the skill set pool in ascending order of skill so that calls are offered to the lower skill sets first.
- Longest Idle: calls are first offered to the longest idle agent.
- Longest Idle Internal: calls are first offered to the agent who has been idle the longest, based on internal calls only
- Longest Idle External: calls are first offered to the agent who has been idle the longest, based on external calls only.

You may also select a leader for each skill set. The leader of the skill set can access the voice mailbox of the skill set to listen to the voice messages. You may also set the PIN code for the skill set mailbox and set a limit to the number of voicemail messages.

Group	Name	Leader	Hunting	Enable Voicemail Available= (All)	Messages	PIN Code
820	Sales Campaign 820	None 💌	Cyclic Start		20 💌	
821	Sales Standard 821	Mia van Damm 💌	Priority Routing		20 💌	
822	Support Team 822	None 💌	Longest Idle 💌		20 💌	
823	Skillset 823	None 💌	Cyclic Start 💌	<b>Z</b>	20 💌	
824	Skillset 824	None 💌	Longest Idle Internal 💌	<b>Z</b>	20 💌	
825	Team 825	None 💌	Cyclic Start	<b>Z</b>	20 💌	
826	Team 826	None 💌	Priority Routing	<b>Z</b>	20 💌	
827	Team 827	None 💌	Priority Routing	<b>Z</b>	20 💌	
828	Skillset 828	None 💌	Longest Idle 💌	<b>Z</b>	20 💌	
829	Skillset 829	None 💌	Cyclic Start 💌		20 💌	
830	Skillset 830	None 💌	Cyclic Start 💌		20 💌	
831	Skillset 831	None 💌	Longest Idle 💌		20 💌	
832	Skillset 832	None 💌	Longest Idle 💌		20 💌	
833	Skillset 833	None 💌	Cyclic Start 💌	<b>Z</b>	20 💌	

# 2.4. Fallback to Operator

The 'Fallback to Operator' page is used to forward the calls destined for the skill set to the Operator in the event of No Answer or Busy from the skill set pool.

Group	Name	Forward on No Answer Fallback	Forward on Busy Fallback
820	Sales Campaign 820	<b>Z</b>	✓
821	Sales Standard 821	<b>V</b>	
822	Support Team 822	<b>Z</b>	
823	Skillset 823	<b>V</b>	<b>V</b>
824	Skillset 824	<b>V</b>	<b>V</b>
825	Team 825	<ul><li>✓</li></ul>	
826	Team 826	<b>Z</b>	<b>V</b>
827	Team 827	<b>Z</b>	<b>V</b>
828	Skillset 828	<b>Z</b>	<b>V</b>
829	Skillset 829	<b>Z</b>	<b>V</b>
830	Skillset 830	<b>Z</b>	<b>V</b>
831	Skillset 831	<b>Z</b>	<b>V</b>
832	Skillset 832	<b>Z</b>	<b>V</b>
833	Skillset 833	<b>Z</b>	<b>V</b>
834	Skillset 834	<b>Z</b>	<b>V</b>
835	Skillset 835	<b>Z</b>	<b>V</b>
836	Skillset 836		<b>V</b>
837	Skillset 837		<b>V</b>
838	Skillset 838		<b>V</b>
839	Skillset 839	<b>V</b>	✓

# 2.5. Wall Displays

Go to the page 'All Wall Displays' and click on the settings icon to select which of the 20 skillsets you wish to display on the wallboard.

By clicking the skillset button, the summary live status panel for the skillset is displayed and the button becomes green.

You can display a message or a title at the top of the wallboard by typing it into the white box.

	12/03/20	014 17:29::	20 January I	nbound Sales	С	<b>aption:</b> January Inbound Sales Promo
Ava	Ilset 820 <i>ilable: 0 / 2</i> Abandoned Calls: 1 Waiting: 0	Ava	Ilset 821 <i>ilable: 0 / 0</i> Abandoned Calls: 0 Waiting: 0			Skillset 820 Skillset 821 Skillset 822 Skillset 823 Skillset 824 Skillset 825 Skillset 826 Skillset 827 Skillset 828 Skillset 829 Skillset 830 Skillset 831

By clicking on any skill set panel, you display the detailed performance for the skill set and for every individual agent in the skill set. Call data collection must first be activated under the Group Settings icons for the skill set.

Sales Campaign 820 : Internal Users	Current Status Sales Campaign 820 Available: 4 / 4	Call Summar Sales Campaigr	820
Janieta Vogel   Answerod:   Idle Time:   Longest Call:   Answerod:   O   Idle Time:   Longest Call:   Answerod:   O   Idle Time:   I	Con Progress:0	Total Calls: Answered Calls Answered Number: Av. Call Length: Longest Call: Last Call Time: Ringing Av. Call Length: Longest Calls Number: Av. Call Length: Longest Call: Last Call Time: Voice Mail	
		Answered Calls: Abandoned Calls: Forwarded Number: Queue Av. Calls in Q: Max Calls in Q:	

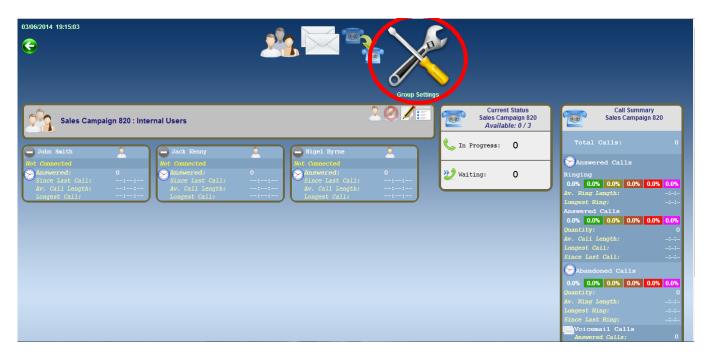
Each skill set has a supervisor wall display which gives real time statistics on the key performance indicators for that skillset.

03/06/2014 19:54:55		>	
Sales Campaign 820 : Internal Users	20/1	Current Status Sales Campaign 820 Available: 0 / 3	Call Summary Sales Campaign 820
John Smith 2 Jack Kenny Rot. Commented	Nigel Byrne	Ln Progress: 0	Total Calls: 0

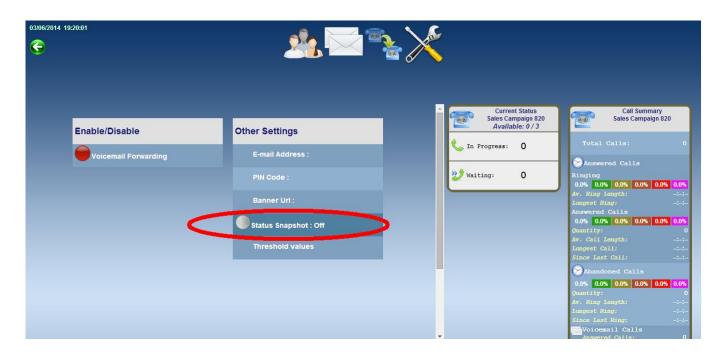
The icons at the top give easy access to Group Assignment, Messages, Forwarding and the skill set settings (e.g. message forwarding, email address, PIN code, banner url, call report data collection periods and thresholds for color highlights).

# 2.6. Program call reports' snap shots and thresholds per skill set

Click on the Group Settings icon at the top of the Skill set programming page.

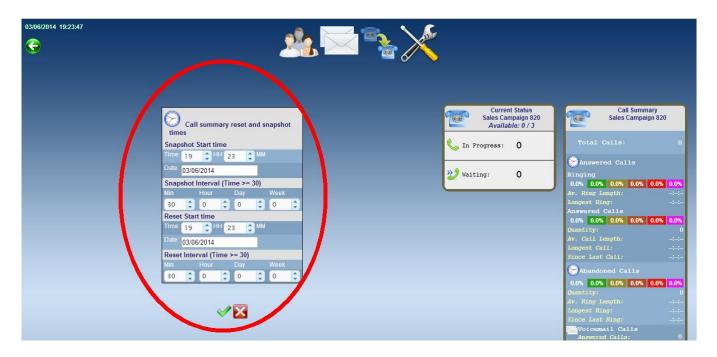


Voice mail forwarding may be activated and email address, PIN code and Banner URL selected for the skill set.



Click on the Status Snapshot tab to access the following page.

### **Contact Centre**



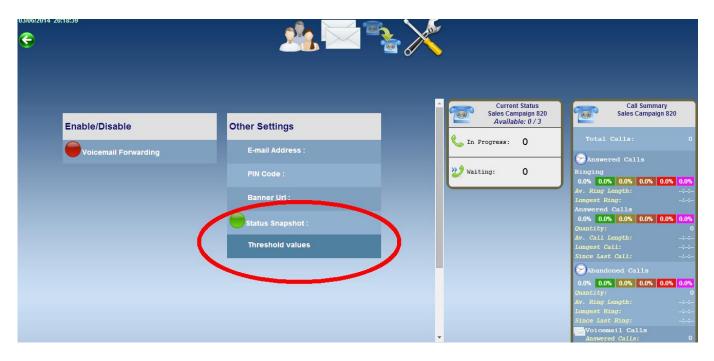
Select the snapshot start time. This is the time at which the system will begin to store call information on the skill set in the Skill set Reports database. The Snapshot Interval defines the duration of each snapshot.

The Reset Start time is the time at which the data displayed in the Call Summary for the skill set on the right hand side of this display is first reset. This is normally the same as the Snapshot Start time. The Reset Interval is the period before which the Call Summary running totals displayed on this page are reset to zero. The Reset Interval should normally be a multiple of the Snapshot Interval. Click the green arrow at the bottom of the page, to save the changes.

14 20:12:57	<u></u> *		
Enable/Disable	Other Settings E-mail Address :	Current Status Sales Campaign 820 Available: 0/3	Call Summary Sales Campaign 82 Total Calls:
	PIN Code : Banner Url : Status Snapshot :	Waiting: O	Answered Calls           Ringing           0.0%         0.0%           Av. Ring Length:           Langest Ring:           Answered Calls           0.0%         0.0%           0.0%         0.0%           0.0%         0.0%           0.0%         0.0%
	Threshold Values		Av. Call Length: Langest Call: Since Last Call: Abandoned Calls 0.0% 0.0% 0.0% 0.0% 0.0% Quantity: Av. Ring Length:
			Longest Ring: Since Last Ring: Voicemail Calls Answered Calls:

Click on the red Status Snapshot icon, so that it turns to green, to activate the call data collection.

### **Contact Centre**



Click on the Threshold values icon to set the color signals for the call summary:.

03/06/2014 20:09:31			<u>*</u>	<u>المج</u>		
	Threshold value	5			Current Status Sales Campaign 820 Available: 0 / 3	Call Summary Sales Campaign 820
	In Progress Colour	Total Calls	Time	u Pro	ogress: 0	
	#28a010	1	0 0 1 0	2 Waiting: 0		Answered Calls
	#968827	2	0 🛟 : 2 🛟 : 0 🔅		walling: U	0.0% 0.0% 0.0% 0.0% 0.0%
	#b34a29	3	0 🛟 : 3 🗘 : 0 🗄			Av. Ring Length: -:-: Longest Ring: -:-:
	#ef1010	4 🗘				Answered Calls 0.0% 0.0% 0.0% 0.0% 0.0% 0.0%
			and the second se			Quantity: 0
	#ef10f7	5	0 🗘: 5 🗘: 0			Av. Call Length:        Longest Call:
	Waiting					Since Last Call:
	Colour	Total Calls	Time			Abandoned Calls
	#28a010					0.0% 0.0% 0.0% 0.0% 0.0%
	#968827	2	0 🛟: 0 🛟: 30 🔅			Quantity: Av. Ring Length:
	#b34a29	3 🗘	0 🗘: 0 🗘: 45			Av. Ring Length:            Longest Ring:            Since Last Ring:
	#ef1010	4	0 🛟: 1 🛟: 0 🗄			Voicemail Calls

Click on the green arrow to accept your changes.

## 2.7. Supervisor log-in: Wall Username and Password

Each supervisor has a username and PIN code which gives access to the supervisor privileges including the wall display configuration. The usernames and PIN codes are defined on the page Wall Username & Password:

Home		Wall Username & Password		Help
	Group	User	PIN Code	]
	All Wall Displays	Master Wall		
	Skillset 820	Wall 820		
	Skillset 821	Wall 821	••••	
	Skillset 822	Wall 822		
	Skillset 823	Wall 823		
	Skillset 824	Woll 924		

The first user on this page 'Master Wall' has supervisor privileges for all skill sets. All of the other users have supervisor privileges for a single skillset.

# 2.8. External Number Priority

The supervisor may wish to prioritize inbound calls to the Contact Centre based on the number dialed. Calls to a high priority number will be answered first. You can set the priority for each external number by clicking the link 'External Number Priority':

External Number	Name	Priority
35318160000	MSN 1	1 💌
35318160050	MSN 2	3 💌
35318160041	MSN 3	2 💌
35318160009	MSN 4	None 💌
35318160007	MSN 5	None 💌
35318160043	MSN 6	None 💌
35318160096	MSN 7	None 💌
35318160030	MSN 8	None 💌
35318160048	msn 9	None 💌
35318160046	MSN 10	None 💌

# 2.9. Agent and Skillset Reports

The system stores call data from the programmed Snapshot Start time for each skill set, provided the Status Snapshot tab at the skill set Group Settings is set to display the green button.

You can generate reports of the key performance indicators for each agent or skillset by clicking the Skillset Report link:

Skillset Report		Skillset		Summary/Snapshot				
Skillset Report 🔻	All 🔻		•	All 🔻				
Period Start	Time: 20	C HH 33	C MM	Date: 04/05/2014				
Period End	Time: 20	🗘 нн 😗	🗘 MM	Date: 03/06/2014				
				,				
	Skillset Report : Output Columns							
Draw a box with your curs	Draw a box with your cursor to select items. Hold down the Ctrl key to make multiple non-adjacent selections.							
	Selecte	d items have Total (		ground.				
	Ringin	ig Answere		old [#]				
		g Answere						
		g Length ()						
		st Ring ( A						
		cted Durati						
	Connec	cted Durati	on Threst	rold [%]				
	Answered Calls							
	Av. Call Length							
		Longes						
		t Call (Ans						
		oned Ringi						
	Abando	ned Ringi Abandon		1010 [%]				
	Av Ring			d Calle )				
	Av. Ring Length ( Abandoned Calls ) Longest Ring ( Abandoned Calls )							
Last Call ( Abandoned Calls )								
	Voicemail Calls ( Answered Calls )							
Voicemail Calls ( Abandoned Calls )								
Forwarded Calls								
Av. Calls in Q								
Max Calls in Q								
	Av. Ring Length ( Queue )							
	Longest Ring ( Queue )							
	i i i i i i i i i i i i i i i i i i i							
			_					

Select a skillset or an individual agent, from the drop-down menus at the top of the page and the time period of the report. You can click on the icons at the bottom of the page to preview the report or download it as a csv file.

The report for a skillset contains the following key performance indicators:

Total Calls, Answered Calls, Average Call Length, Longest Call, Last Call, Average Ring Length, Longest Ring,

For Abandoned Calls: Number of abandoned calls, Average ring length, Longest Ring, Last Call

Voicemail Calls Answered, Voicemail Calls Abandoned

Forwarded Calls, Average Calls in Queue, Maximum Calls in Queue, Average Ring length in Queue, Longest Ring in Queue