



Centcom 2011

Centcom Agent Manual

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Introduction

The prime component of Centcom, the Agent Application, is installed on each Customer Service Representative (CSR) desktop PC. The Agent Application:

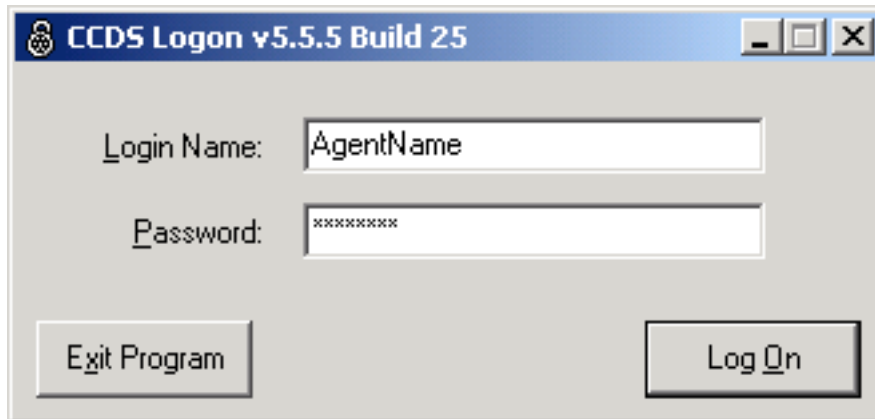
- Manages the connection to Centcom and the Object Telephony Server components for all client applications residing on CSR PCs
- Provides a common and configurable agent interface for all desktop telephony and call handling functions
- Provides configurable inbound and outbound screen pop ups
- Allows the agent to initiate call recording
- Allows the agent to transfer calls (both internally and externally)
- Allows the agent to initiate and manage conferences
- Provides call disposition and call management functions such as notes, call backs, and Do Not Call list management
- Captures agent activity and work flow information
- Facilitates data collection for integration to host or legacy databases

This section of the manual assumes you have correctly set up your Agent Application. The settings and configurations for the Agent Application and the Agent Launcher are covered in the Centcom Configuration and Set-Up Manual.

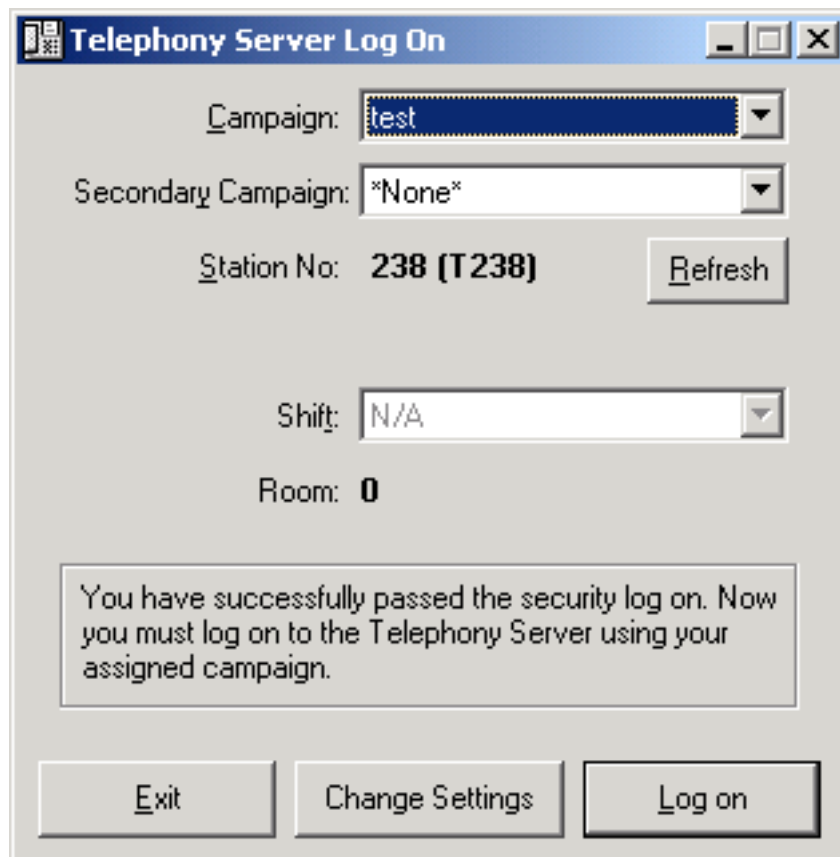
Logging On

After launching the agent application, you will be prompted to enter a Log-in Name and Password. Login Names and Passwords are assigned using the Centcom Administrator Application. See the “Creating, Editing & Deleting Agents” section of the Administrator User Guide for more details. In order to successfully complete the log on process, your settings must be Configured (all the server components must be running, and you must be authorized for an active, running campaign). Refer to the Administrator User Guide for further instructions.

Enter your Login Name and Password, click on the “Log On” button. Note that log-in names and passwords are not case sensitive.



The screenshot shows a dialog box titled "CCDS Logon v5.5.5 Build 25". It contains two text input fields: "Login Name:" with the text "AgentName" and "Password:" with "xxxxxxx". At the bottom, there are two buttons: "Exit Program" on the left and "Log On" on the right.



The screenshot shows a dialog box titled "Telephony Server Log On". It features several input fields and buttons. The "Campaign:" field is a dropdown menu with "test" selected. The "Secondary Campaign:" field is a dropdown menu with "*None*" selected. The "Station No:" field contains "238 (T238)" and has a "Refresh" button next to it. The "Shift:" field is a dropdown menu with "N/A" selected. The "Room:" field contains "0". A message box at the bottom states: "You have successfully passed the security log on. Now you must log on to the Telephony Server using your assigned campaign." At the very bottom, there are three buttons: "Exit", "Change Settings", and "Log on".

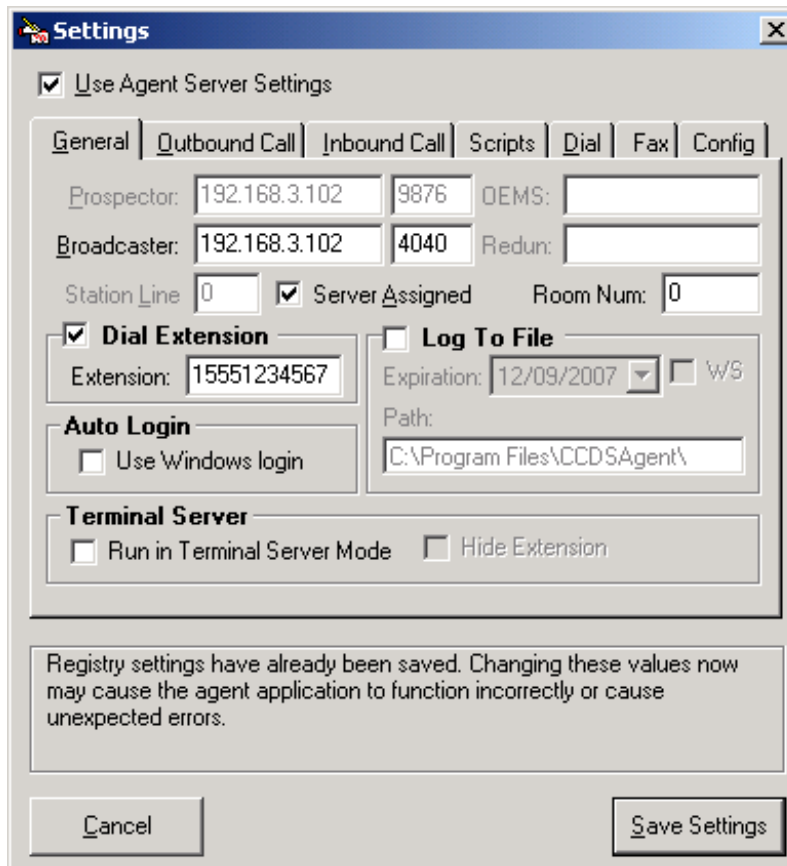
All of the active campaigns to which you have rights appear in the drop-down Campaign menu. Select the campaign you would like to log in to, and click **Log On**. If the campaign you want to log in to does not appear in the list, or if you get a screen that looks like the image below, you probably logged on before the campaign was actually running. Press the **Refresh** button to fetch the updated list from the server.

The secondary campaign allows an agent to receive overflow calls from an inbound campaign that normally wouldn't be caught by another agent.



Campaign: [Dropdown menu]
Secondary Campaign: *None* [Dropdown menu]
Station No: 49 (T49) [Text field] Refresh [Button]

Agent Settings



Settings

Use Agent Server Settings

General | Outbound Call | Inbound Call | Scripts | Dial | Fax | Config

Prospector: 192.168.3.102 9876 OEMS: [Text field]
Broadcaster: 192.168.3.102 4040 Redun: [Text field]
Station Line: 0 Server Assigned Room Num: 0

Dial Extension Extension: 15551234567
 Log To File Expiration: 12/09/2007 WS
Path: C:\Program Files\CCDSAgent\

Auto Login
 Use Windows login

Terminal Server
 Run in Terminal Server Mode Hide Extension

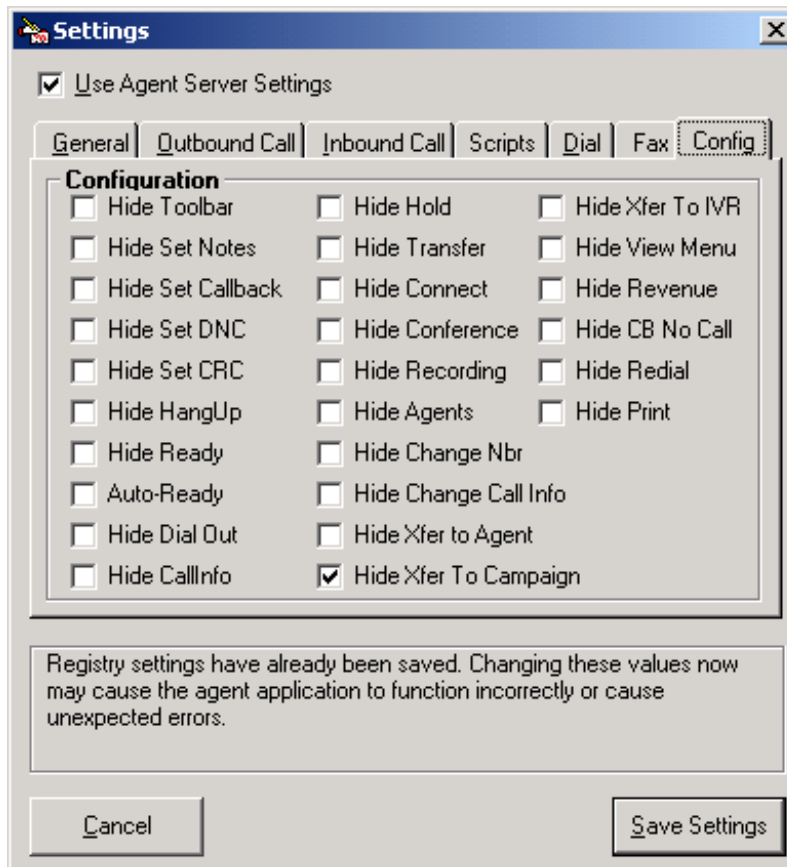
Registry settings have already been saved. Changing these values now may cause the agent application to function incorrectly or cause unexpected errors.

Cancel Save Settings

The Agent Application includes a few new features including Room Number which is a reportable feature that allows a call center to assign a room number to a particular station for reporting purposes. The intent is for telemarketing companies to be able to track performance based on individual rooms. This room number is assigned to the station - not to the user.



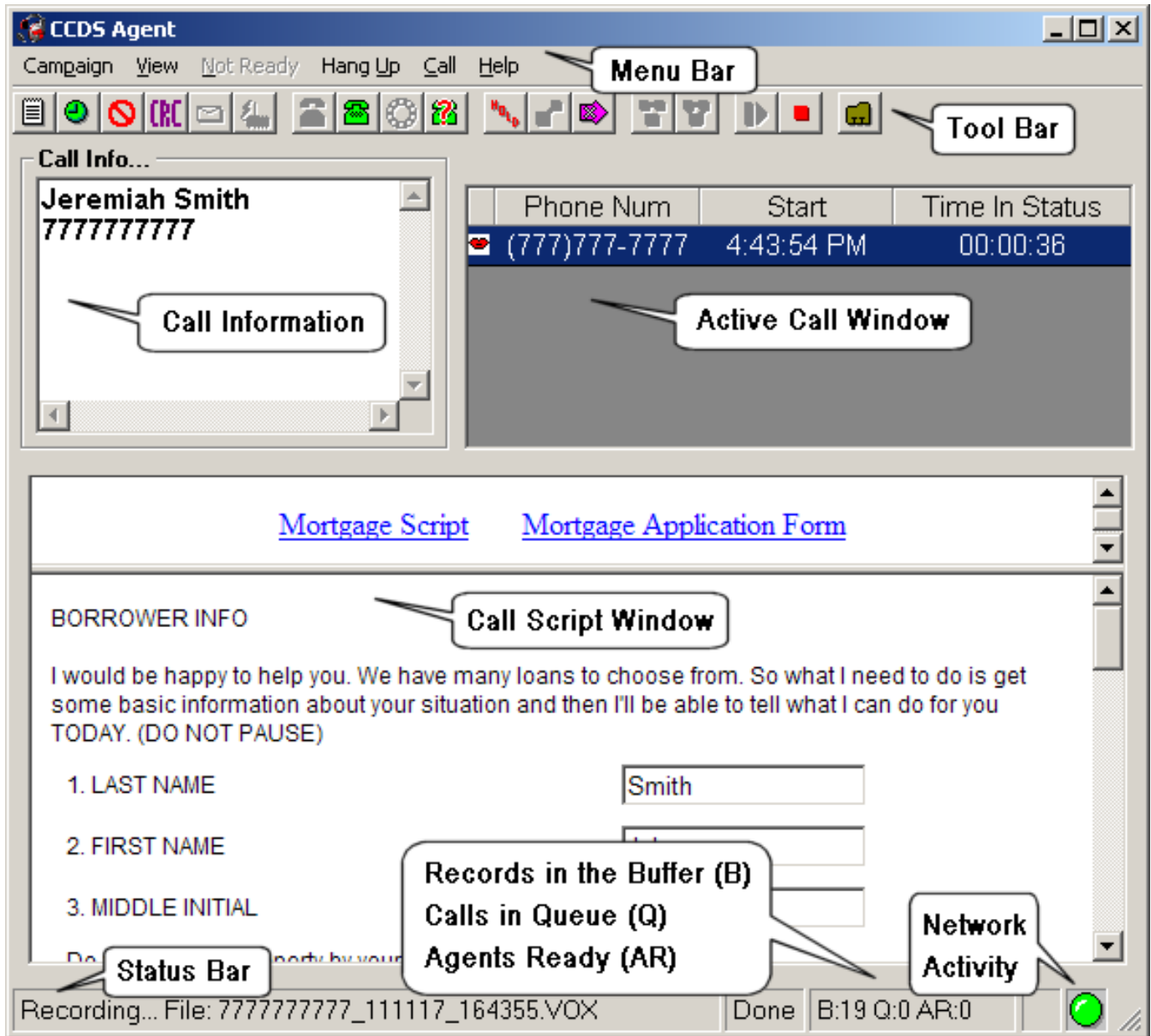
Once the station is assigned a number, it shows up in the campaign log in screen. In addition to the room number feature, there is another new log in feature called Shifts. Shifts allow the agents to log in to a shift for tracking purposes. Shifts can be assigned by a number (e.g., "1") or another distinction (e.g., "morning"). Shifts will be setup in the Administrator Application and are available from the drop-down menu.



Another new feature available in the Agent Application is Agent Security. In the Agent Application set-up, you can select the "Config" tab. The picture above illustrates the available options that can be hidden. Some of the settings (such as "Hide Hold") apply to the Agent Application, while others (such as "Hide Set DNC") apply to the disposition screen. "Auto-Ready" is another new feature that forces agents to go directly to "Pull Next Call" upon logging in or hanging up a call.

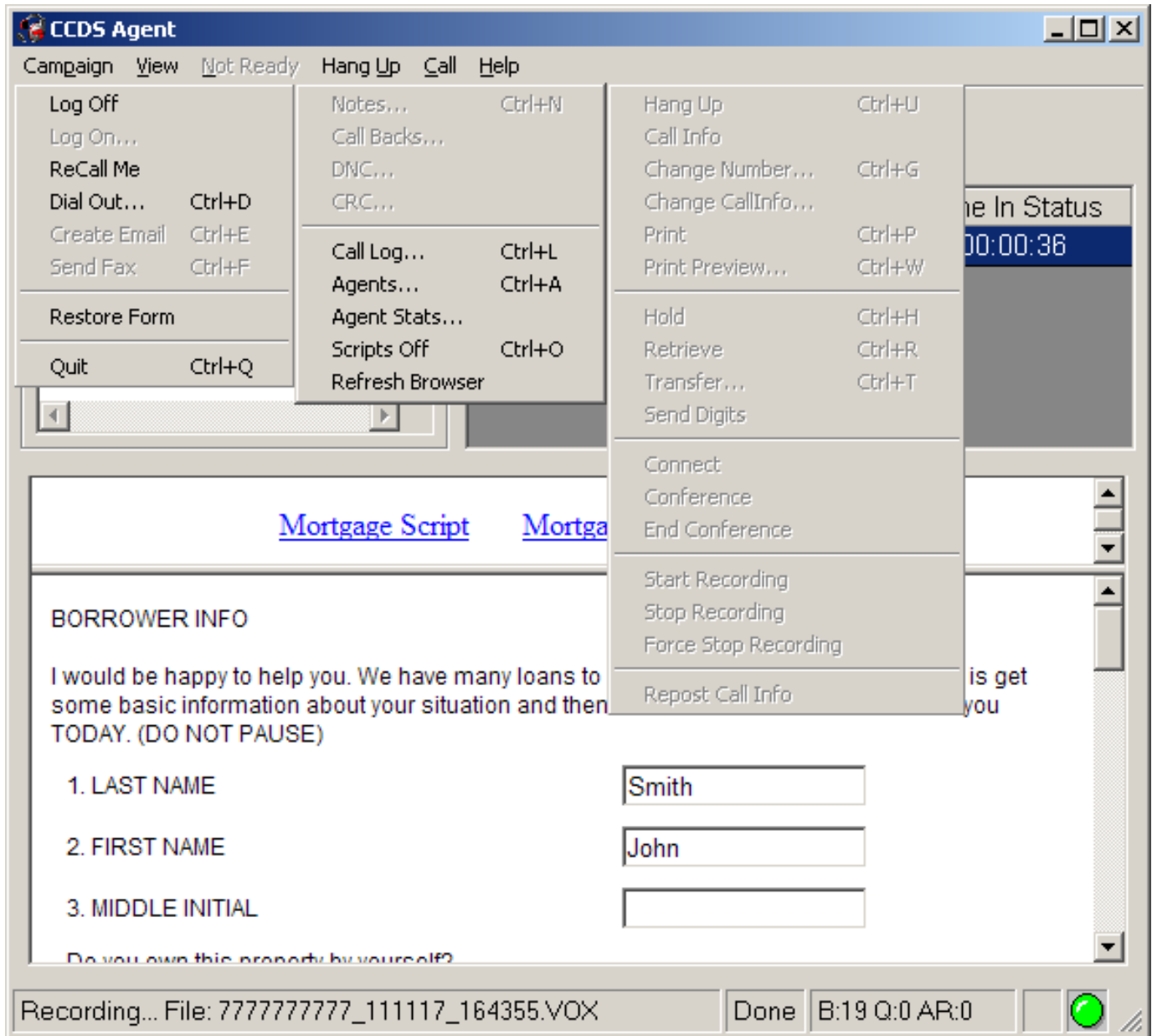
Agent Screen

As soon as a call is routed to the CSR, the Agent window will display the current call information in the upper left portion of the screen. Any active calls will be displayed on the right side of the screen. The bottom of the screen is reserved for the call scripts. Note that if the agent application is minimized when a call is routed, the agent screen will steal the windows focus.

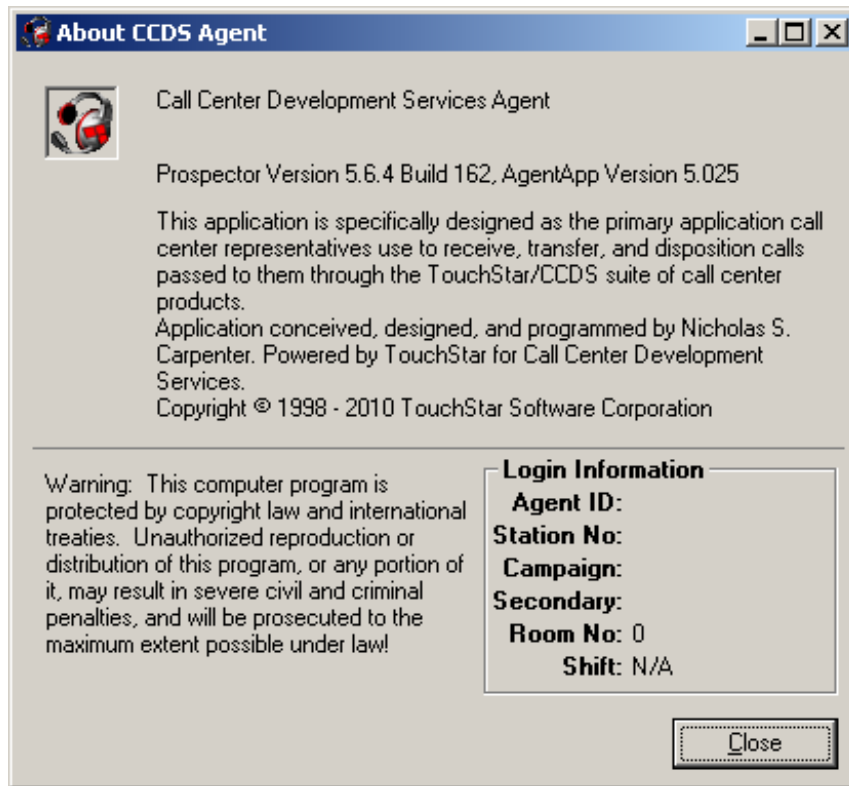


Menu Bar and Tool Bar


The menu bar and tool bar have similar functions that you can use either with a mouse or the keyboard. To use the keyboard, use the alt or control key, along with the "hot key" (the underlined letter within the word) and the arrow keys.



The “Campaign”, “View”, and “Call” menus offer a variety of functions, many of which are also in the tool bar. The “Ready/Not Ready” and “Hang Up” menus act as buttons; clicking on them will yield the appropriate function rather than a drop down menu. The “Help” menu allows the user to acquire the latest version of Centcom and view the product information, as shown here in the About screen:.

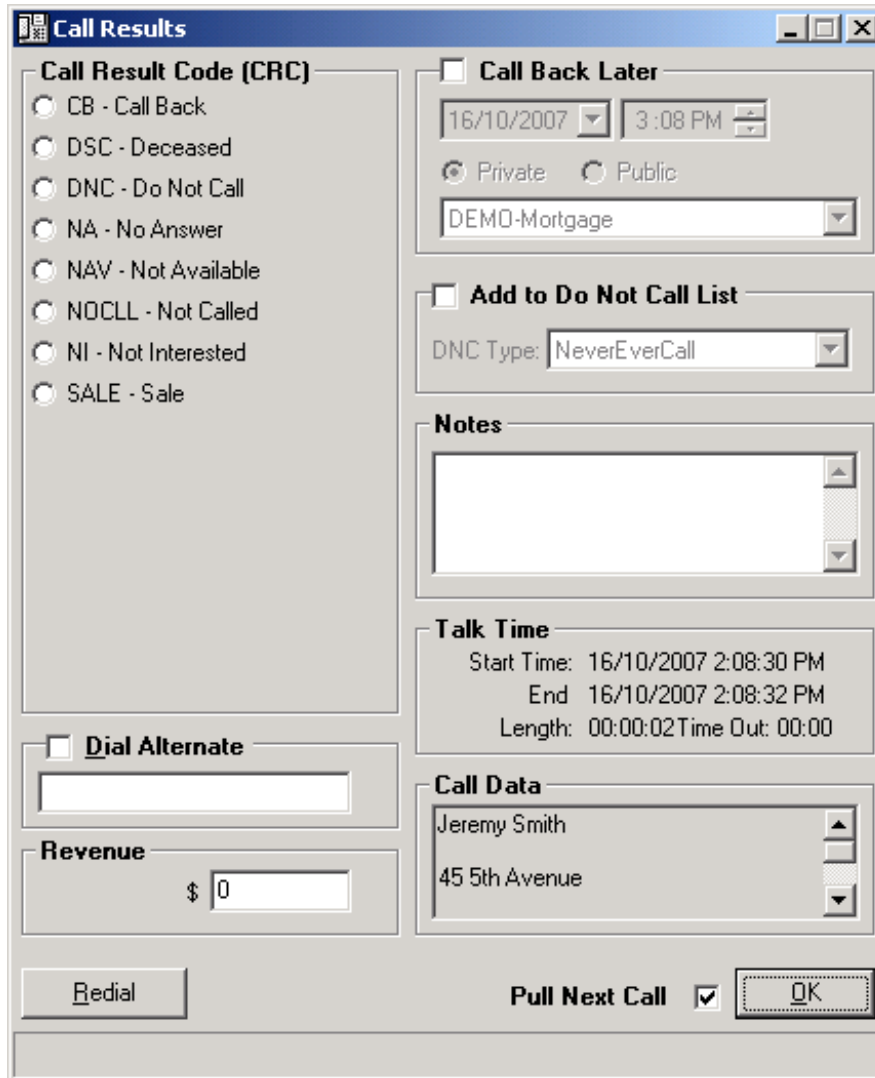


Pulling a Call

To pull a call, you can either click “Ready” in the menu bar, or on the “Next Call” icon  in the tool bar. This will change your status from “Not Ready” to “Ready,” and the system will begin transferring calls to you. Menu selections and tool bar buttons will toggle to active or inactive as appropriate. For example, the “Next Call” icon will turn gray and the “Hang Up” icon will activate.

Hang Up

When you are finished with a call, click on the “Hang Up” icon  or choose “Hang Up” from the menu bar. You can also right click on the call and select Hang Up from the menu that appears. When you hang-up, the following window will appear:



The image shows a software window titled "Call Results" with a standard Windows-style title bar (minimize, maximize, close buttons). The window is divided into several sections:



- Call Result Code (CRC):** A list of radio buttons for selecting a call result code:
 - CB - Call Back
 - DSC - Deceased
 - DNC - Do Not Call
 - NA - No Answer
 - NAV - Not Available
 - NOCLL - Not Called
 - NI - Not Interested
 - SALE - Sale
- Call Back Later:** A section with a checkbox, a date dropdown (16/10/2007), a time dropdown (3:08 PM), radio buttons for "Private" (selected) and "Public", and a dropdown menu containing "DEMO-Mortgage".
- Add to Do Not Call List:** A section with a checkbox and a dropdown menu for "DNC Type" set to "NeverEverCall".
- Notes:** A large empty text area with scrollbars.
- Talk Time:** A section displaying call duration information:
 - Start Time: 16/10/2007 2:08:30 PM
 - End: 16/10/2007 2:08:32 PM
 - Length: 00:00:02
 - Time Out: 00:00
- Call Data:** A section with a list box containing "Jeremy Smith" and "45 5th Avenue".
- Dial Alternate:** A section with a checkbox and an empty text input field.
- Revenue:** A section with a label "Revenue" and a text input field showing "\$ 0".
- Buttons:** At the bottom, there is a "Redial" button, a "Pull Next Call" checkbox (checked), and an "OK" button.

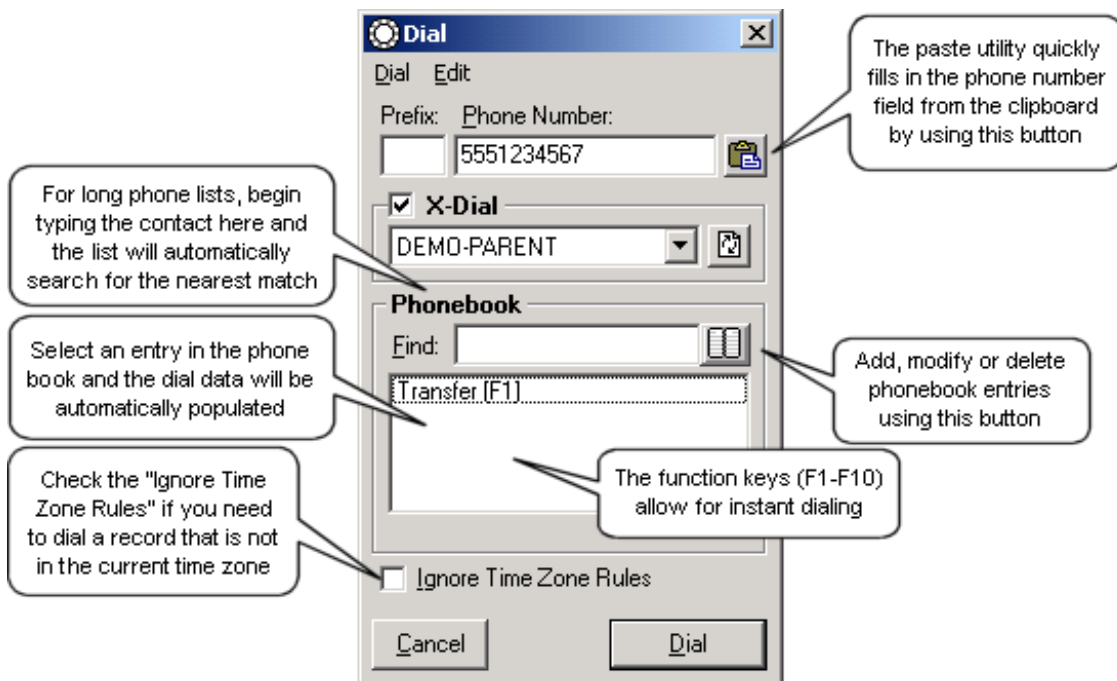
Any information you entered during the call will be carried over, but this is a good time to double-check that information. Also, if you did not have time to enter something during the call, this gives you a second chance to do so.

Selecting a CRC

For most calls, select the appropriate CRC from the menu. Your supervisor defines the options based on the campaign. After you have selected the CRC, if you do not need to set a call back, click on the "OK" button to receive the next call. This is all you will need to do. However, you can also set a call back, add the number to the "Do Not Call" list, write notes, and view the call data prior to clicking on the "OK" button. Most of what you see in this window is the same information you would see during a live call. In this screen you will also see the "Talk Time" and the call duration.

Dial

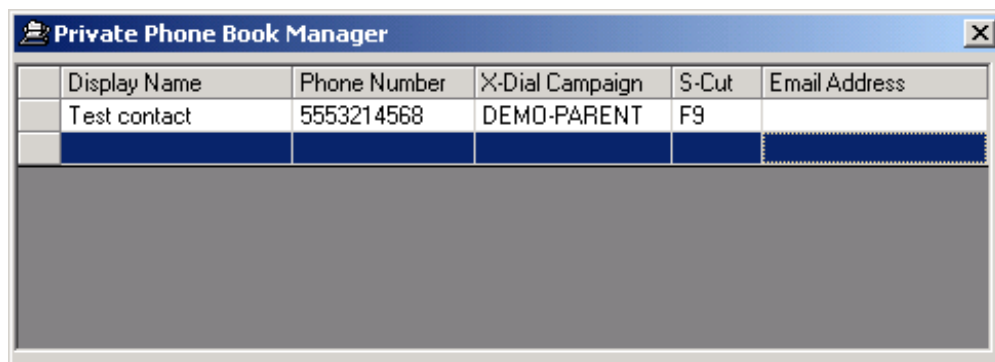
To manually enter a phone number, click either the  icon or Dial Out in the Campaign menu, then type the phone number in the phone number box, and click  to call.



In addition to manual dialing, the Dial pop up window also includes a phone book interface

Dialing Phone Numbers from the Phone Book

- Select the entry and the phone number from the phone book list, and X-Dial will fill in the stored contact information.
- Double-click the entry in the phone book, and the application will fill in the information and dial the phone number for you.
- If an entry has a shortcut key, press it anytime and the application will fill in the information and dial the phone number.



Display Name	Phone Number	X-Dial Campaign	S-Cut	Email Address
Test contact	5553214568	DEMO-PARENT	F9	

Modifying an Entry

- Double-click the field to be edited or
- Single-click the field and hit “F2” or
- Single-click the field and start typing keys.

Adding a New Entry

- Double-click the Display Name field on the last line of the grid.
- Enter the text you want displayed in the phone book list.
- Double-click or tab over to the next field and enter the phone number to be dialed.
- Double-click or tab over to the next field and select the X-Dial campaign, if required.
- Double-click or tab over to the next field and select a shortcut key if desired.

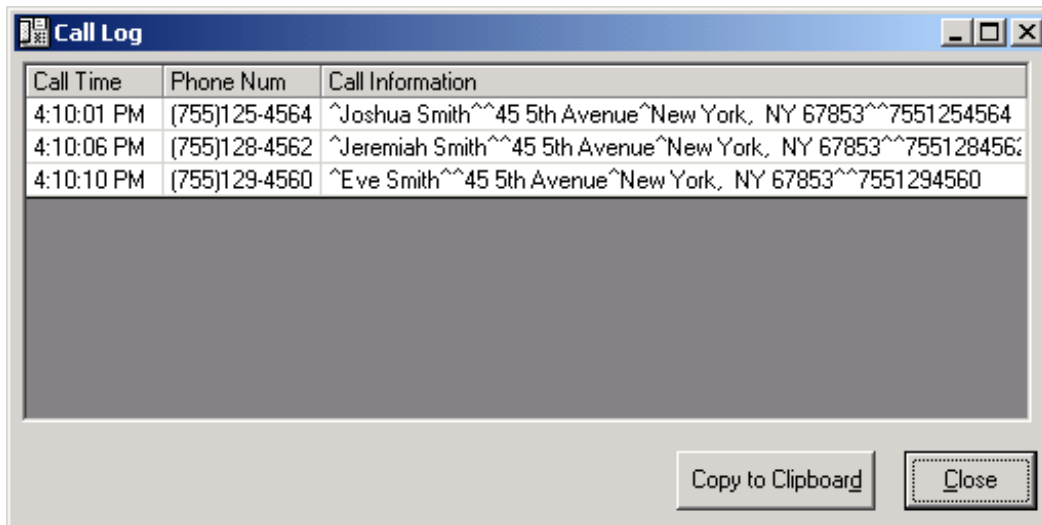
Deleting an Entry

- Select the row in the grid on which the entry exists.
- Press the “Delete” key.

You can select multiple rows using the shift or control keys.

Call Log

Centcom keeps track of all of the calls you make. You can see these calls in the Call Log under View on the menu bar. If you need to copy a phone number to the clipboard, click on the call and then on the **Copy to Clipboard** button.



Agent Statistics

Agent Stats is another feature in the View menu. Statistics are displayed as shown below.

The screenshot shows a window titled "Agent Stats: frank" with a close button (X) in the top right corner. The window displays the following information:

Logged On at: 58214.14

Calls

Inbound	Outbound	Preview	Agent Gen	Callbacks	Connects	Contacts	Success
0	3	0	0	0	3	3	0

Log On Stats

	Total Time	Ave. Per Call
Talk Time:	00:00:04	00:00:01
Hold Time:	00:00:00	00:00:00
Wrap Time:	00:00:07	00:00:02
Wait Time:	00:00:00	00:00:00
Not Rdy Time:	00:04:34	00:01:31
Total Time:	00:04:45	00:01:35

Log Off Stats

	Total Time
Break Time:	00:00:00
Meal Time:	00:00:00
Meeting Time:	00:00:00
Other Time:	00:00:00
Total Time:	00:00:00

Revenue

\$0.00

OK


Active Call Functions

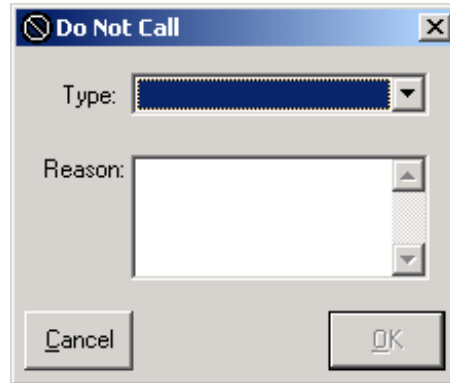
There are several different things you can do with a call once you have received a call from the server. The most common function is to complete the call script and hang up. However, you can also:

- Transfer a call
- Connect multiple calls
- Conference calls
- Record a call

All of these functions are available through both the menu bar and the tool bar. Many of the functions are also available by right clicking on the call in your Active Calls window. The tool bar is the easiest way to access all of the functions. The agent application will apply the function to the call currently selected in the Active Call List window.


DNC

Select the DNC button  to open the Do Not Call box. Then, select the DNC type and type in the reason for the call. (This will select the DNC check box on the “Call Results” box, and the notes will also transfer to this box. You can also select the DNC check box and the Call Results pop-up box for the same results.)




The "Do Not Call" dialog box features a title bar with a close button. It contains a "Type:" dropdown menu, a "Reason:" text area with a vertical scrollbar, and "Cancel" and "OK" buttons at the bottom.


Hold Call

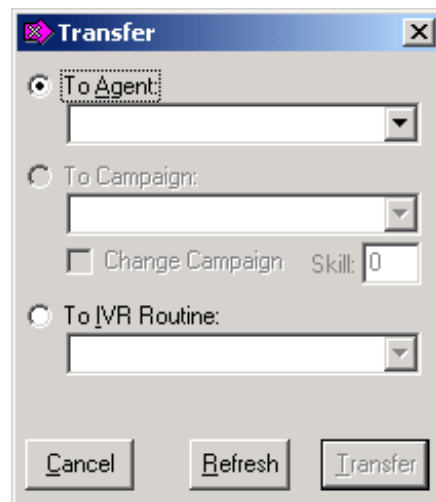
Click  or go to the Call menu to place a call on hold.

Retrieve Call

Click  or go to the Call menu to retrieve either a call on hold or a call transferred to you.


Transfer Call

Click  or go to the Call menu to transfer a call. You can transfer it directly to another agent, to a campaign so that the next available agent in that campaign will pull it, or to an IVR routine, if your call center utilizes that feature. If the agent, campaign, or IVR routine to which you want to transfer does not appear in the appropriate drop-down menu, click “Refresh” to regenerate the lists. Before you click transfer, make sure that you have selected the appropriate radio button.




The "Transfer" dialog box has a title bar with a close button. It includes three radio button options: "To Agent:" (selected), "To Campaign:", and "To IVR Routine:". Each option has a corresponding dropdown menu. Below the "To Campaign:" option is a checkbox for "Change Campaign" and a "Skill:" field with the value "0". At the bottom are "Cancel", "Refresh", and "Transfer" buttons.


Connect Calls

If you have two active calls on hold selected (to select, use the shift or control key and click on each call), you can connect them using the  icon or by going to the Call menu. This will make it so that the people you have on the other end of the lines can talk to each other, but not to you. Once you click this button, you have no way of joining either call. They will be able to talk to each other and hang-up when the conversation is finished.

Conference Call


If you have two active calls on hold, you can connect all three parties using the  icon or by going to the Call menu. This will create a three-way call. There is no way to separate the calls again after you click this button.

Record Call


Click the  icon or go to the Call menu to begin recording a call. This will record both sides of the conversation to a sound file that resides on the telephony server.

A supervisor will be able to retrieve that sound file later should it be needed.

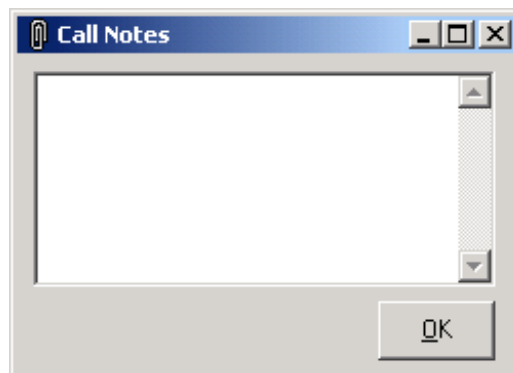
Stop Recording

When you are finished recording, press the  icon or go to the Call menu.


Call Notes

To access call notes for your current, active call, either click the  icon or select Notes from the View menu. This database will hold up to 255 characters. The call notes will be seen when the call is stored as a callback or transferred to another agent or campaign.

Call notes do not span across campaigns or duplicate entries in the same campaign.



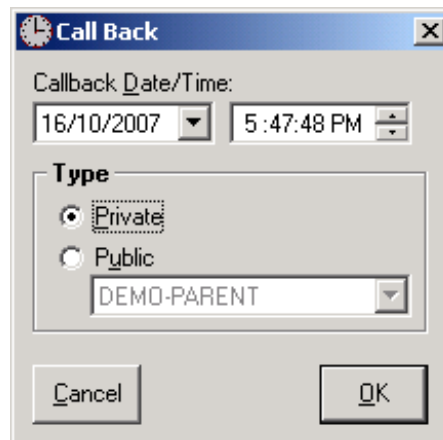
Call Backs

Click on the  icon or select Call Backs from the View menu to schedule a call back.

This can be used to call a customer at a specific time. When you schedule the call back, decide whether it should be Private or Public.


- A private call back will reach the agent that is setting the call back, no matter what campaign they're working on, as long as they're logged in at the time of the call back.
- A public call back will be assigned to a specific campaign and will be transferred to the first available agent in that campaign at the date and time you specify.

Note: When setting the time keep in mind the time you are setting is eastern standard time, which is not always the time of the person to be called.



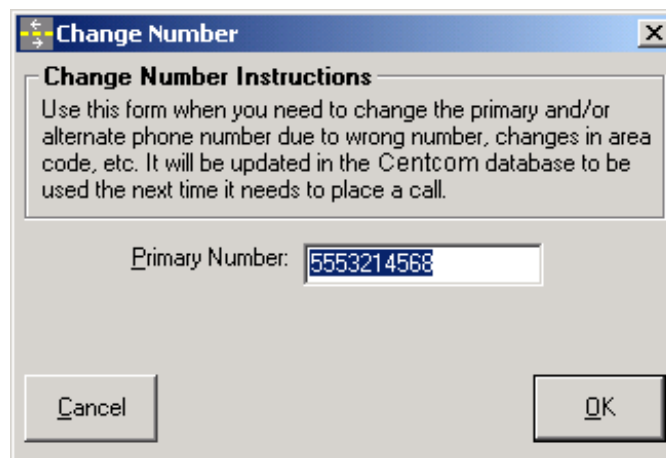
The 'Call Back' dialog box features a title bar with a clock icon and a close button. Below the title bar, the 'Callback Date/Time:' label is followed by two input fields: a date dropdown set to '16/10/2007' and a time spinner set to '5:47:48 PM'. Underneath, the 'Type' section contains two radio buttons, 'Private' (selected) and 'Public'. A dropdown menu below the radio buttons is set to 'DEMO-PARENT'. At the bottom, there are 'Cancel' and 'OK' buttons.

Call Info

Click  or go to the Call menu to get detailed information about the current call.

Change Number

An agent can change the number of a record during a live call. Click on "Call" in the menu bar and select "Change Number". The "Change Number" box will appear with instructions.



The 'Change Number' dialog box has a title bar with a plus icon and a close button. The main area is titled 'Change Number Instructions' and contains a text box with the following text: 'Use this form when you need to change the primary and/or alternate phone number due to wrong number, changes in area code, etc. It will be updated in the Centcom database to be used the next time it needs to place a call.' Below the instructions is a text input field labeled 'Primary Number:' containing the value '5553214568'. At the bottom, there are 'Cancel' and 'OK' buttons.

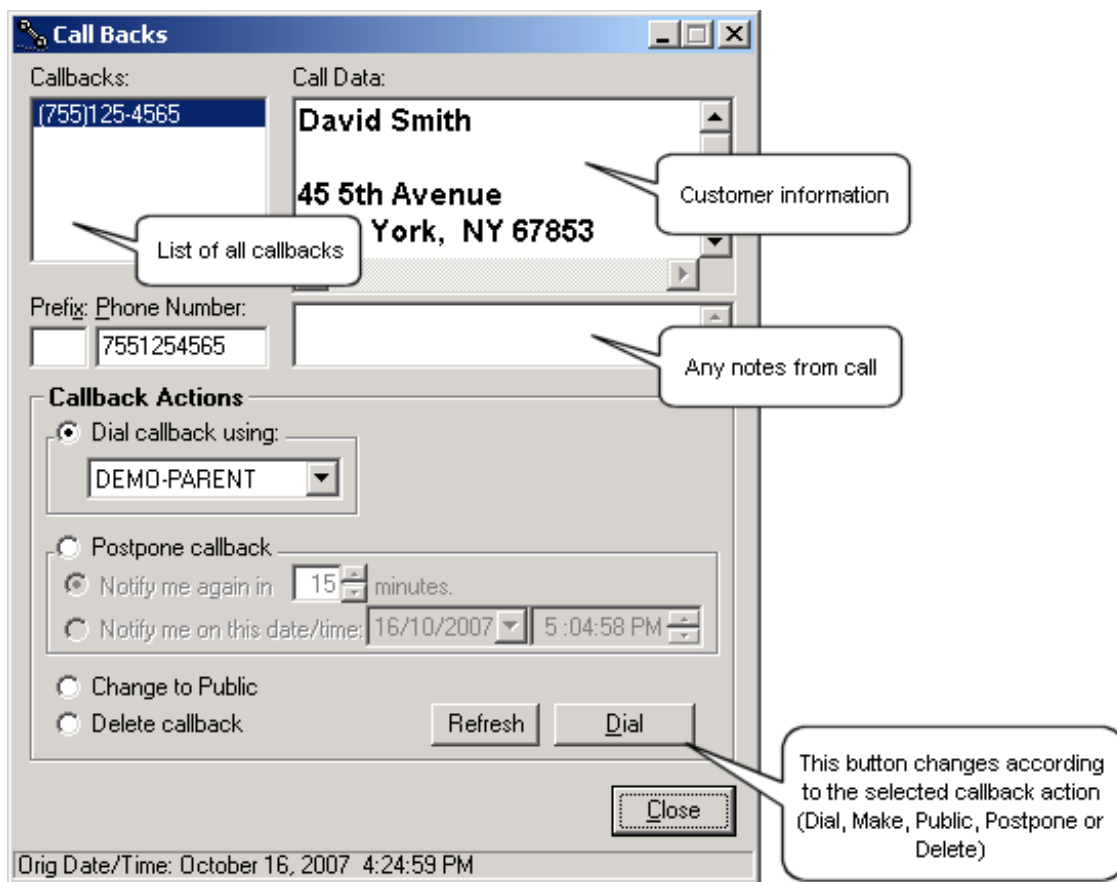
Receiving Call Backs

Once you have scheduled a private call back and the designated time arrives, the window below will appear. On the left are all of the currently scheduled callbacks that you have.


If you click on one of the phone numbers, the call data for that call back will appear on the right hand side. On the bottom half of the screen are ways that you can deal with the selected call back. If you want to complete the call back, you can do so by selecting a campaign in the "Dial Callback Using" menu.

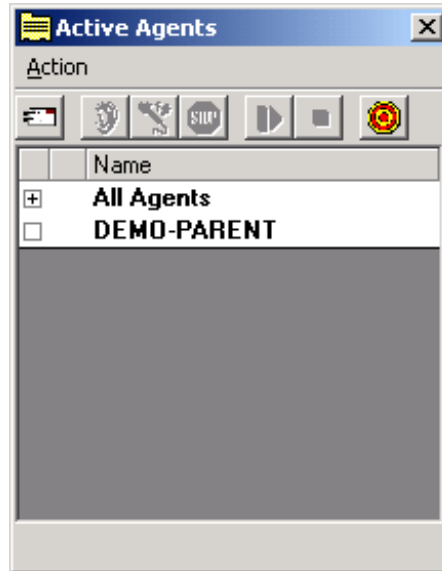
Select either the campaign that your supervisor has told you to use for dialing out, or the campaign from which the call originated. You can also change a call back to public by selecting "Change to Public for:" and selecting the appropriate campaign. (Usually the same campaign as the one it originated from)

You can also postpone or delete the callback. Once you are finished, click or continue with other callbacks. To bring this window up without having a scheduled callback, select "Call Backs" from the View menu.





Active Agents




Click the  icon or select Agents from the View menu to bring up a list of active agents. This will allow you to send text messages, monitor, coach, and record other agents, provided you have the required privileges. Press the circular target button to refresh the list. The Active Agents function can be useful if your supervisor is signed in and you need help with an irate or difficult customer, or if someone who normally handles the customer with whom you are speaking is logged on and you have a question for them.





Chatting

Click the  button to type messages to a selected agent. Type what you want to say in the bottom portion, and then click the  button or press enter. You will know you have a message, when you see the flashing yellow envelope at the bottom of your main agent screen.

Monitor, Coach, and Stop

Listen  (Monitor) allows you to monitor both sides of a conversation without being heard on either side. Coach  allows you to listen in on both sides of the conversation, and have the agent hear you for prompting and training purposes, without the customer knowing you're there. Remember to use a whisper voice when coaching because the customer may hear loud voices. The stop button  will end the coaching or monitoring session.

Record and Stop

The  and  buttons work the same way as in the main window, except they allow for recording of the selected agent's conversation instead of your own.

Note: It is very important to use the stop button when you are finished Coaching, Monitoring, or Recording sessions. (Do not close-out the Active Agents window without clicking the stop button)