Hosted Phone CloudQ Agent Users Guide

1. INTRODUCTION TO HOSTED PHONE CLOUDQ

Your Hosted Phone CloudQ Agent application brings call centre capability to your engin service.

Using your favorite Internet browser, you can log into your engin service and:

- Control your incoming and outgoing calls
- Monitor the call centre queue that you are a part of
- Use the engin Directory to interact with contacts in your call centre

2. CLOUDQ MAIN INTERFACE

The application has the following work areas:

1. **Logo pane** – The Logo pane displays information about you and contains links to other pages and functions.
2. **Call Console** – You use the Call Console to view and manage your current calls.
3. **Contacts pane** – The Contacts pane contains your contact directories, the list of your supervisors, and the list of the call center queues to which you belong. It allows you to use your contacts to make and manage your calls.
4. **Call History dialog box** – You use the Call History dialog box to view your past calls and make calls from history.
5. **Report window** – You use the Report window, accessed via the Reporting link, to generate reports about your activity and performance in the call centers you are staffing.
6. **Settings pages** – You use the Settings pages, accessed via the Settings link, to configure various aspects of Call Center.

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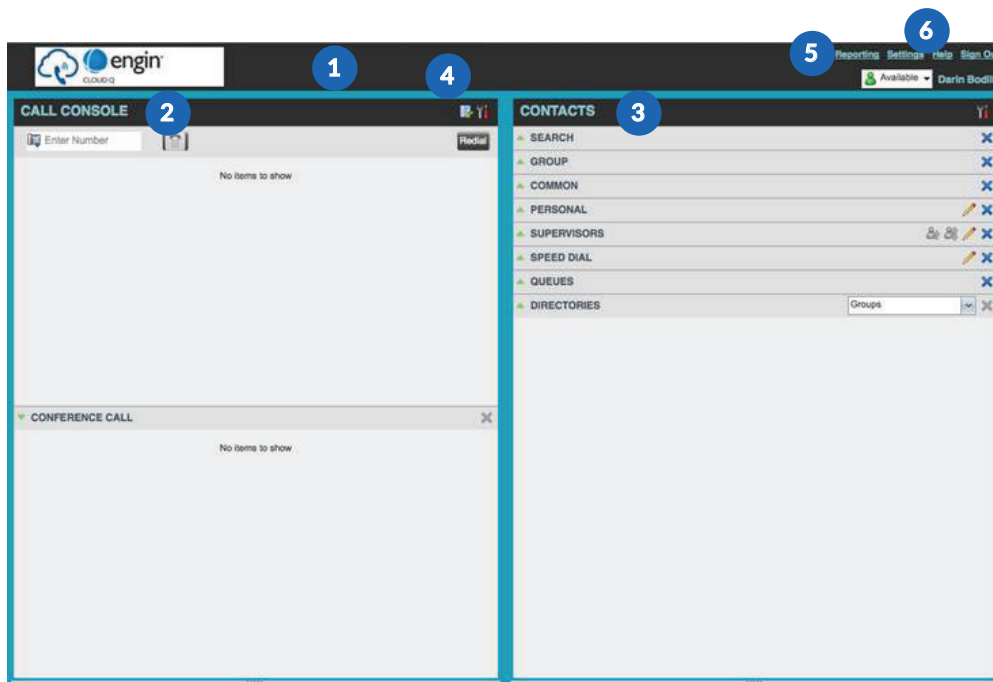
Your CloudQ call centre states

Your CloudQ state can be one of the following:

 AVAILABLE - You are available to receive calls

 UNAVAILABLE - You are not available to receive calls

 WRAP-UP - You are wrapping up a call and temporarily unavailable to receive calls

Configure Your Post Sign-In CloudQ state

You can set your status in the CloudQ for the moment your first 'sign-in' to the CloudQ.

1. On the main page, click the **Settings** link.
2. On the Settings page, click the **Application** tab.
3. Set your **Post Sign-In CloudQ State** and **Post Call CloudQ State.**
4. If you set Post Call CloudQ State to "Unavailable", you may have to select a code that explains the reason for your unavailability.
5. If you set your Post Call CloudQ State to "Wrap-Up", check the Set Wrap-Up timer to box and then select the length of time before your state changes to Available upon the completion of a call.

Change your CloudQ state and set the unavailable code

You can change your status in the CloudQ at any moment and set an unavailability code.

1. At the top right-hand side of the main window, click ACD states and then select your new state from the drop-down list.
2. If the Unavailable Codes feature is enabled and you select Unavailable as your ACD state, a list of codes to choose from appears. Select the code that best describes the reason for your unavailability.


View Incoming Call Details

If the Notification feature is enabled, a notification window appears on top of the system tray when you receive a call, displaying the name and number of the caller.

For calls from your CloudQ displays:

- Calling name and number on which the call was received
- CloudQ or DNIS name
- Wait time of the call
- Number of calls in queue
- Diversion information, if applicable
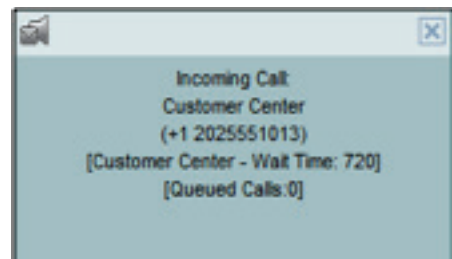
Open a web page (URL) from the callers information

You can open a Uniform Resource Locator (URL) page in your browser to obtain more information about an incoming or any current call. This page contains information about the calling party encoded in its URL.

In the Call Notification pop-up window, that appears when you receive a call or in the Call Console for the target call, click 'Web Pop URL'.

Saving caller information into your Outlook contacts VCard

When Outlook is running on your computer, you can save the caller's phone number and personal information as a vCard in Outlook.

In the Call Notification pop-up window that appears when you receive a call, click Add vCard

Dial Ad-hoc numbers

In the Dialer, enter the number to call and click Dial

Call a Contact in the Directory

1. In the **Contacts** pane, click the contact to call and then click **CALL** for that contact.
2. To dial the contact's extension, click **EXT** or click **MOB** to dial the contact's mobile number.

Redial a Number

Up to 10 previously dialed numbers are available.

In the **Dialer**, click the **Redial** button and then select a number from the list.

Call History

1. In the **Call Console**, click **Call History**.
2. In the **Call History** dialog box, select Missed Calls, Received Calls, or Placed Calls.
3. Click a call log to expand it and then click Call for that log.

Answer Call

Calls can be answered automatically or manually.

To answer calls automatically: In the **Call Console**, click **Auto Answer.**
Note that this feature works only if your handset device supports 'Advanced Call Control' (ACC). In addition, if Auto Answer is enabled on the engin server, you must not enable Auto Answer in this CloudQ Agent application.

To answer a call manually: Move the mouse over an incoming call and click ANS.

Blind Transfer a Call

Calls can be blind transferred while active, held, or ringing (in).

1. To transfer the call to an ad hoc number, enter the number in the **Dialer** and then click **Transfer**.
2. To transfer the call to a contact, click a contact in one of the contact's directories and then click **TXR** for that contact.

Start a Three-Way Conference Call

1. In the Call Console, select one of the two calls to conference.
2. Move the mouse over the second, non-selected call and click CONF. The calls are moved to the Conference Call panel.

Add a caller to the Conference Call

In the Call Console, move the mouse over a call and click **CONF**.

Hold or Resume the Conference Call

1. To hold a conference, click **HOLD** in the Conference Call panel header. The other parties continue their conversation.
2. To resume a held conference, click **ANS**.

Leave the Conference Call

You can only leave a Three-Way conference.
In the **Conference Call** panel, click **LEAVE**. The other parties continue their conversation and the calls are removed from the Conference Call panel.

Drop a caller from the Conference Call

In the **Conference Call** panel, select a call and then click
Note: This function is not available from a remote office.

Hold a caller in the Conference Call

In the **Conference Call** panel, move the mouse over the target call and then click HOLD.

Resume a caller in the Conference Call

In the **Conference Call** panel, move the mouse over the target call and then click ANS.

End the Conference Call

In the **Conference Call** panel header, click . All calls are released.

Monitor Supervisor Phone State

When escalating a call or making an emergency call, it is useful to know which supervisors are available to take calls.
1. In the **Supervisors panel**, click Edit
2. In the dialog box that appears, select the supervisors to monitor.
3. Click **Save**. The selected supervisors have their phone state displayed.

Transfer a Call with Consultation

Calls can be transferred while active, held, or ringing (in).

1. Dial the number or contact to whom you want to transfer the call.
2. When the call is answered, speak to the party.
3. From the **Call Console**, select the original call.
4. Move the mouse over the new call and click TXR.

Transfer a call back to the CloudQ

1. From the **Call Console**, select the call to transfer.
2. In the **Contacts** pane, expand the Queues panel.
3. Click the CloudQ name to expand it and then click TXR for that queue.

Hold Call

In the **Call Console**, click HOLD for an active call.

Note: This function is not available from a remote office.

Resume a Call

In the **Call Console**, click ANS for a held call.

Note: This function is not available from a remote office.

End a Call

In the Call Console, move the mouse over a call and click.

Generate a Call Trace

To generate a call trace for a current call:

In the **Call Console**, move the mouse over a call and click **TRACE** for that call. A call trace notification is generated, containing the name and address of the parties, the time stamp of the call, the call ID, and the system ID.

To generate a call trace for the last released call: In the **Call Console** header, click Trace.

Tag a CloudQ Call with a Disposition Code

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

To assign disposition codes to a current call:

1. In the **Call Console**, click the call.
2. From the list that appears, select a disposition code. The code is applied to the call and logged in the engin server.

To assign disposition codes in Wrap-Up:

1. When in Wrap-Up, click **Disposition Code** in the **Call Console** header.
2. From the drop-down list that appears, select a code. The code is applied to the last released call.

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Phone States

The possible contact phone states are :

🟢 Available   ⛔ Do Not Disturb

🔴 On a Call   🔒 Private

🟠 Ringing   ➡️ Forwarding

⚪ Unknown

Make an Emergency Call to your Supervisor

While on a call, click **Emergency button**

in the **Supervisors panel** to let the engin system select a supervisor, or click an available supervisor and then click **EMER** for that supervisor.

Blind Escalate a Call to your Supervisor

1. While on a call, click **Escalate** in the **Supervisors** panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor. The new call appears in the Call Console.
2. In the **Call Console**, select the original call.
3. Without waiting for the supervisor to answer, move the mouse over the call to the supervisor and then click **TXR**.

Escalate a Call with Consultation

1. While on a call, click **Escalate** in the **Supervisors** panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor.
2. When the call is answered, consult with the supervisor.
3. In the **Call Console**, select the original call.
4. Move the mouse over the new call and then click **TXR**.

Escalate a Call with Conference of Hand Over

1. While on a call, click **Escalate** in the **Supervisors** panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor.
2. When the call is answered, consult with the supervisor.
3. In the **Call Console**, select the original call.
4. Move the mouse over the call to the supervisor and click **CONF**. The call appears in the **Call Console** panel.
5. To hand over the call to the supervisor, click **LEAVE** in the **Conference Call** panel. The customer and the supervisor continue their conversation.

Escalate a Call with Mid-Conferance hold

1. While on a call, click **Escalate** in the **Supervisors** panel to let the system select a supervisor, or click an available supervisor and then click **ESC** for that supervisor.
2. When the call is answered, consult with the supervisor.
3. In the **Call Console**, select the original call.
4. Move the mouse over the call to the supervisor and then click **CONF**.
5. To put the conference on hold, click **HOLD** in the Conference Call panel header. The other parties continue their conversation and the calls stay in the **Conference Call** panel.

Camp on Busy Contact

1. In the Call Console, select the call to camp on.
2. In the Agents or Supervisors directory, move the mouse over a busy or ringing contact and then click **CAMP**. The call is camped and removed from the **Call Console**.
3. If the call timer expires before the call is answered, the call is recalled to your device and reappears in the **Call Console**.

Send E-mail to Contact

1. Expand the Group/Enterprise or Favorites tab, click a contact with e-mail, and then click **EMAIL**.
2. In the message window that appears, enter the required information and then click **Send**.

Display Call History

Call History displays your placed, received, and missed calls.
1. In the Call Console, click Call History.
2. To view call logs in a group, select the group from the Show drop-down list.

Delete Call History

1. In the Call Console, click Call History
2. To delete a specific call log, select the call log to delete in the Call History dialog box and then click Delete for that call.
3. To delete all call logs, click Delete All.

Show or Hide Contacts

1. At the top of the **Contacts pane**, click **Options**, select **View**, and then **Directories**. Then check the directories you want visible and deselect the directories to hide.
2. To show or hide directory contents, click **Expand** or **Collapse** in the directory panel for that directory.
3. To display a directory in the **Directories panel**, select the directory from the drop-down list. To display all directories, select Show all.
4. To display a directory below the **Call Console**, select Show All in the Directories panel and click the **Pullout Directory** button for the target directory.

Search for Contacts

1. In the Search panel, select the directories to search from the drop-down list.
2. To restrict the search to contacts that start with the text to search for, check the Begins with box.
3. In the Search text box, enter the text to search for and press **ENTER**. You can enter partial information, such as part of a name or number. The text is matched against all attributes and the search results are displayed in the Search panel.
4. To clear the search results, click Reset

Manage Speed Dial and Personal Directories

1. In the **Speed Dial** or **Personal panel**, click **Edit** . The Edit Speed Dials/Edit Personal Contacts dialog box appears.
2. To add an entry, click Add. A new row appears. For a Speed Dial entry, select the dial code and enter the number and description of the contact. For a Personal entry, enter the name and number.
3. To delete an entry, select the entry, and click Delete.
4. To modify a Speed Dial entry, double-click the entry so that it can be edited and modify the information as required.

Keyboard Shortcuts

When using keyboard shortcuts, make sure that the main interface window is in focus.

Key	Equivalent Mouse Action
ESC	Click the Close button in a dialog box.
ESC	Cancel the changes.
/	Click the Dialer text box.
?	Click the Search text box.
ARROW DOWN	Click the scroll bar or the next item on a list.
ARROW UP	Click the scroll bar or the previous item on a list.
PAGE DOWN	Scroll down one page.
PAGE UP	Scroll up one page.
1....9	Select a call in the Call Console.
SPACEBAR	Click Answer on the selected incoming call in the Call Console.
<PERIOD>	Click End on the selected call in the Call Console.
ENTER	Click Dial.
ENTER	Click Search.
+	Click Transfer in the Dialer.
SHIFT+1..9	Select a ringing call and click Answer.
SHIFT+1..9	Select an active call and click Hold.
SHIFT+1..9	Select a held call and click Retrieve.
S or s	Click the Settings link.
B or b	Click the Back to Application link.
R or r	Click the Call History button.
H or h	Click the Help link.
D or d	Click the Dashboard link (Supervisor)
SHIFT+L or SHIFT+l	Click the Sign Out link.
SHIFT+A	Select Available (Agent).
SHIFT+U	Select Unavailable (Agent).
SHIFT+W	Select Wrap-Up (Agent).