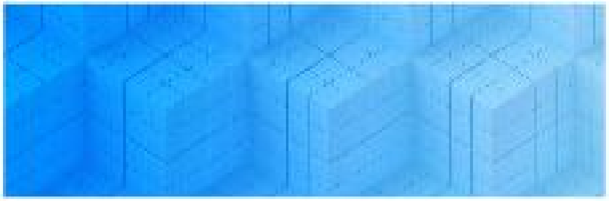
CooCenter
Technical Documentation



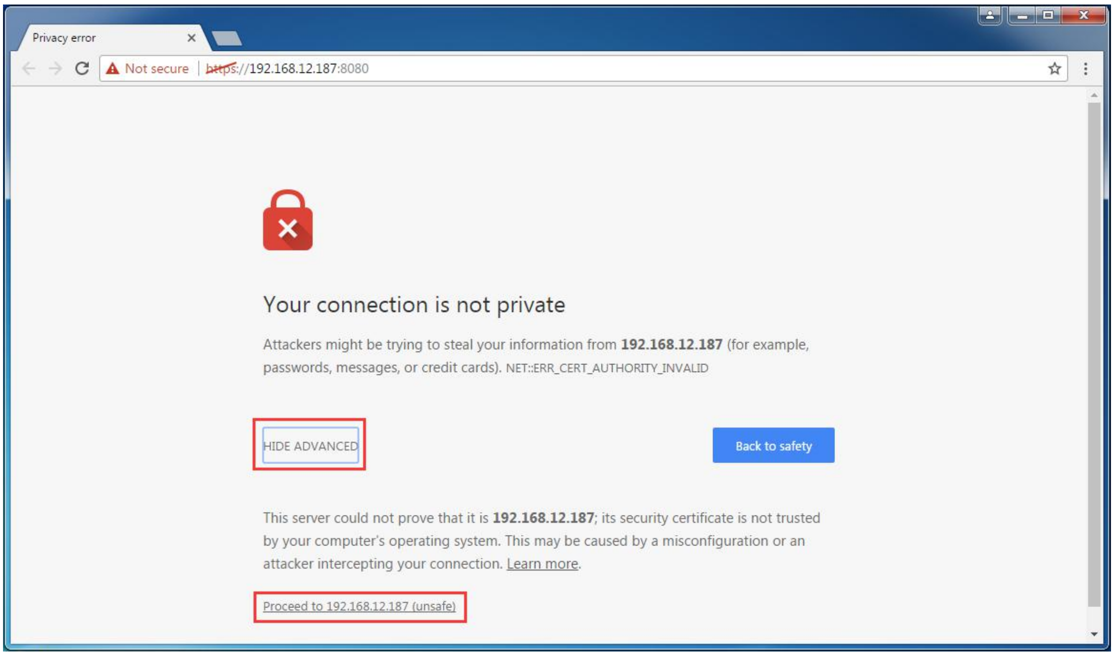
Agent User Guide

software version v3.1.0

Contents

Agent Login

Please ask the system administrator for the URL of your web portal, please open the URL with Google Chrome or Opera browser (The default URL of the WAN port is https://192.168.1.100:8080/ui_callcenter/, the default URL of LAN port is https://192.168.10.100:8080/ui_callcenter/.) . On the login screen input your agent ID and password, if you don't have the password please contact your system admin.
A warning screen might pop up as below.

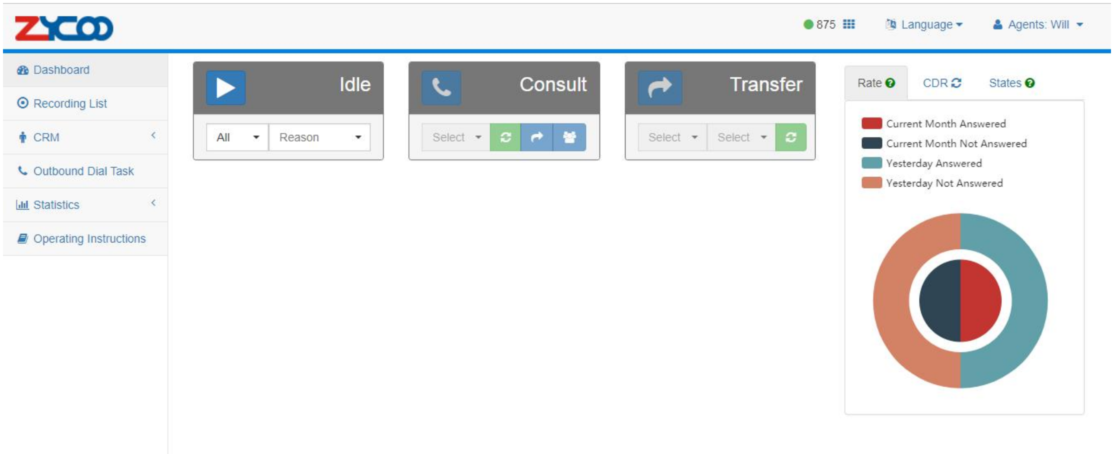


Please click on the "Advanced" option and then click on "Proceed to …" to open the login page.

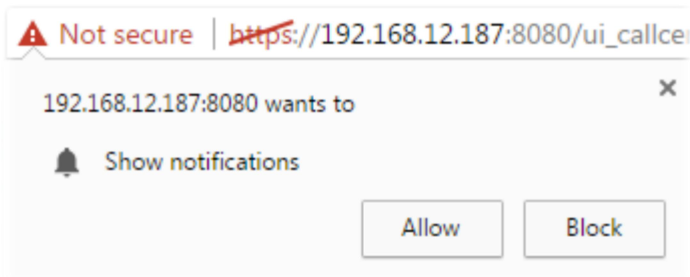
Input your agent Name or agent ID in the “Agent Name” field and your extension password in the “Password” field to sign in.

Dashboard

When you have logged in, you will see the dashboard page as below.



If on the dashboard screen, you see a notification as below.



Please click on “Allow” button to grant the web browser of notifying you with the incoming calls.

If your extension is set to be Web extension, on the top right corner click on the icon, the dial pad will show, and you will be able to make phone calls directly through your Web browser.

If your extension is set to be SIP extension, and the extension is not registered on a SIP phone, when you have logged in you'll see a notice on the top of the dashboard page as below.

Please register your extension on an IP phone or please contact the system administrator.

Ifyour extension is properly registered on an IP phone, then you'll see a notice as below.

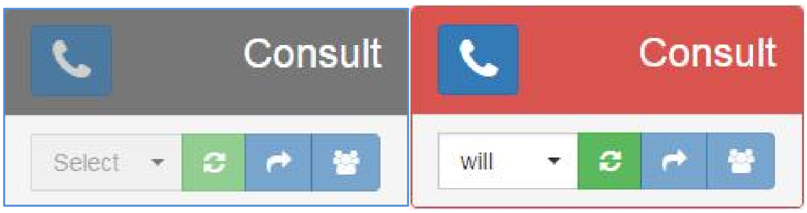
Now you click on the icon and dial a number, you phone will ring, after you pick up the phone the call will start dialing out.

State Change Module

Your status could be“Idle” or “Paused”. When your status is “Idle”, the call center system will distribute phone calls to your extension. If you want to take a break or get a cup of coffee, you can choose one queue or all queues you belong to, then select a reason and click on button to pause your extension, when paused, your extension will stop the system from distributing phone calls, when you back, you may click on button to change you status to idle.

Consult Module

In a live call with the customer, if the customer needs to speak with a supervisor, or you need to consult the supervisor for help, consult feature will be helpful.



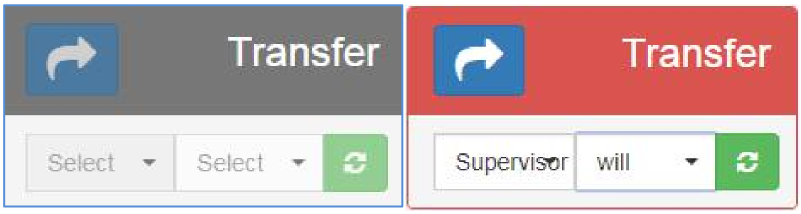
Before you perform a consult call, click on button to see which supervisors are available first, and then choose a desired supervisor, then click on to call this supervisor.

- Consult transfer:After the dialed supervisor answered your call, you may introduce this call first and then click on to complete consult transfer. The customer's call will then be transferred to the supervisor. If you click on before the supervisor answers the call, you'll lose the call with the custom.

- 3-ways conference: After the dialed supervisor answered your call, click on button to establish a 3-way conference call.

Transfer Module

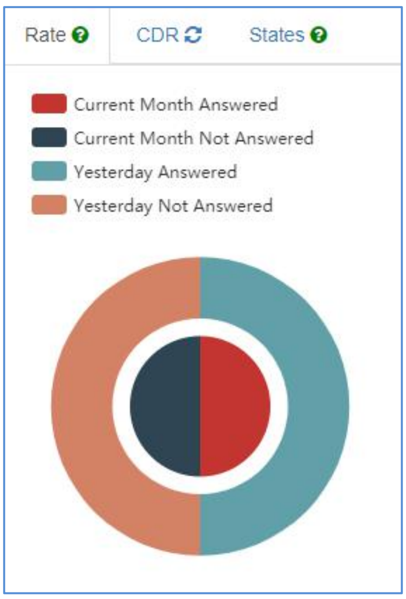
Call Transfer is used to transfer a call from call queue to some other destinations.



Before you perform a call transfer, click on button to see which destinations are available first, and then choose a desired destination, then click on button to transfer this call to the selected destination.

You may transfer a call to an online supervisor, an ordinary call queue agent in the same queue as you, or you may transfer a call to supervisor and agents of other queues by selecting "Others".

Rate

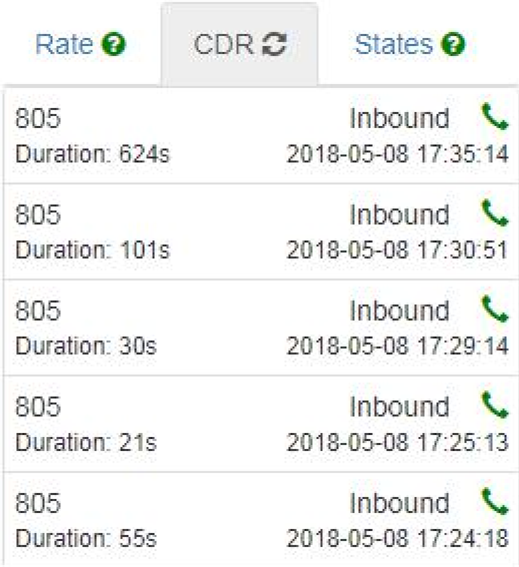


On the above diagram, there are two pie charts, the bigger pie chart shows Current

Month Answered rate and Current Month Not Answered rate while the outer pie chart shows Yesterday Answered rate and Yesterday Not Answered rate. The compare results of Answered rate and Not Answered rate can be observed visually from the chart.

CDR

In the CDR (Call Detailed Records) screen, you can see your recent call history as below diagram.



By clicking on the button you may call the number back.

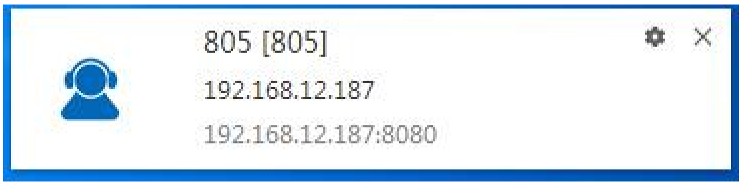
States

This part lists all the incoming calls on the queue. This list is ordered by the time of each call's arrival, the latest incoming call is on the top of the list. You can organize the sequence of the queuing calls if required.

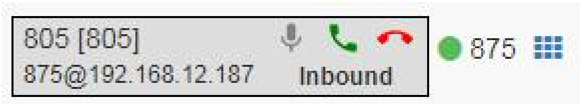
Inbound Calls

Web Extension

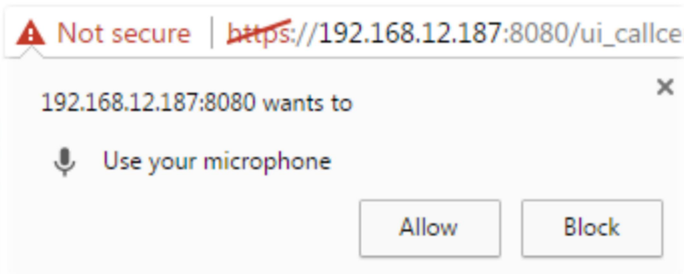
When you have received an inbound call, there will be a notification on your desktop as shown below.



By clicking on this notification, your web browser will show up, on the top of the Web page you have options to answer or decline the inbound call as shown below.

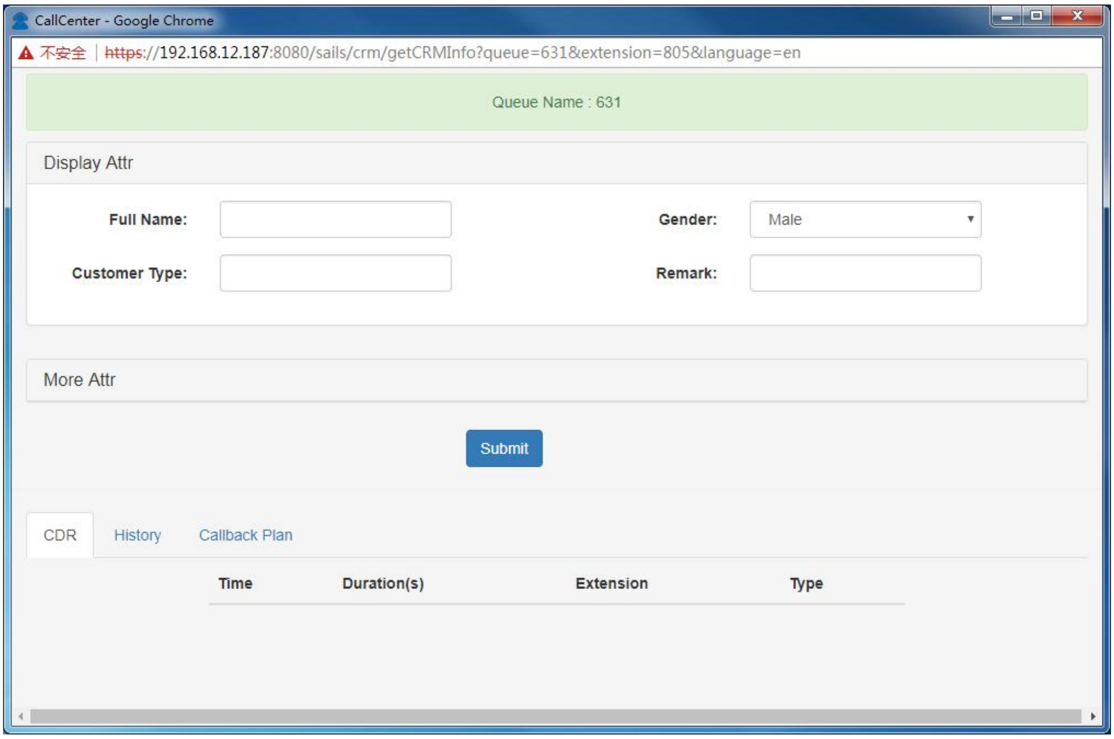


By clicking on the button to answer the call or button to decline the incoming call. You'll see a notification asking for microphone permission if you answer incoming call for the first time.



Please click on the "Allow" button then you'll be able to talk to the caller, otherwise the caller will not be able to hear your voice.

If it's a call from the call queue, a customer management window will pop up.

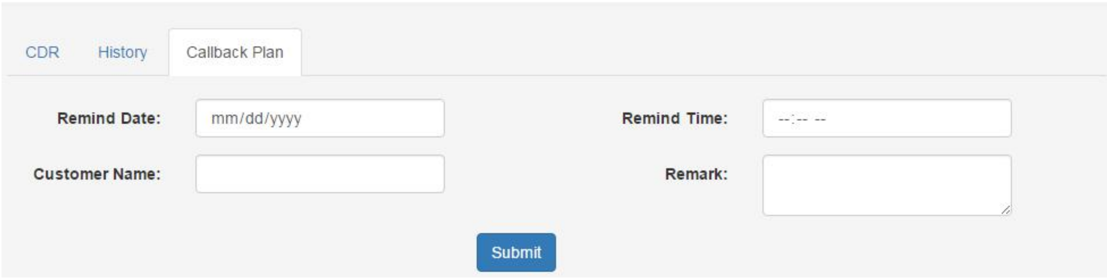


If you didn't see the pop up window, please check if it's your browser had blocked the pop up window like shown below.

Please click on the "Pop-up blocked"notification, and a dialog will show up as below.

You please tick the "Always allow pop-ups from https://..." option to allow inbound call pop-up windows.

In the pop up window you may save the new customer to the CRM system or if it's an existing customer the customer info will be displayed in the pup up window. The recent call history can be checked at the bottom of the pop up window, and you may also make a "Callback Plan" of this customer as below.



When the callback time comes, the system will remind you with a pop up dialog on the web page.

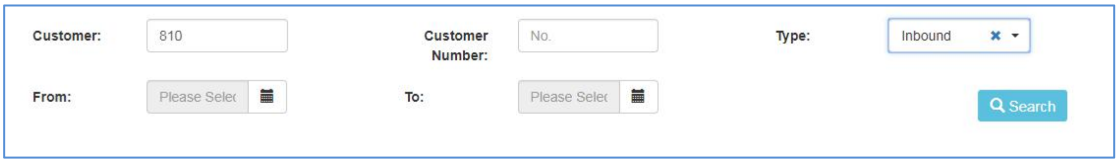
SIP (IP Phone) Extension

If you are using a desktop IP phone or softphone instead of web extensions, your phone will ring upon incoming calls.
Except you don't have options to answer or decline the incoming calls from the web page, other options are all the same as using web extensions.

Recording List

If the system admin had enabled call recording of your extension, the calls (Inbound or Outbound) will be recorded for quality and training purposes. You may review the recorded sessions on “Recording List” page.

When you open this page, by default it will show the 10 recent call recordings, if you wish to search some previous recordings, please follow the instructions below.



- In the “Customer” field and “Number” field, you can use customer name or number to search for desired recordings. For example, if you want to search the recordingsof a customer number “59634602”, you may input the exact number “59634602” or you may just input part of the number “5963” to search. The same for customer name if you want to search by customer name.
- In the “From”field, choose the start time andin the “To” field set the end time to search recordings in this time period.
- In the “Type”fieldselect the call type. Include Inbound, Auto Dialed or Manual Dialed.

Search results will be shown as below diagram.

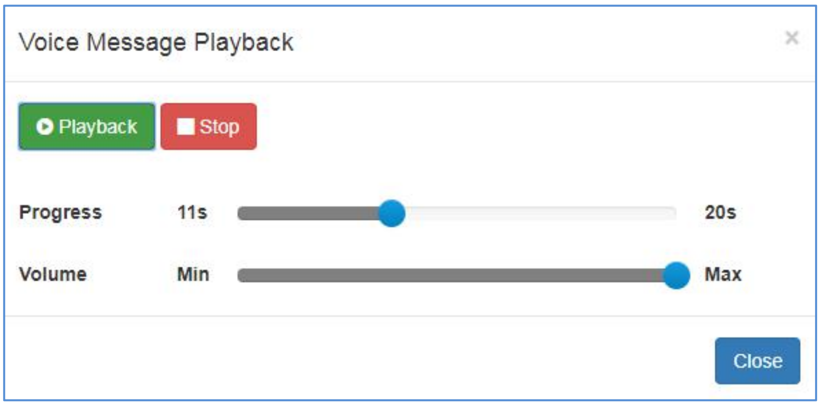
Show 10 entries

Customer Name	Number	Agent Name	Queue Name	Type	Record Duration(s)	Date	Note date	Options
805	805	john	631	Inbound	46	2018-05-09 11:16:02		Play Download
805	805	john	631	Inbound	41	2018-05-09 11:13:39		Play Download
805	805	john	631	Inbound	29	2018-05-09 11:10:06		Play Download
805	805	john	631	Inbound	625	2018-05-08 17:35:07		Play Download
805	805	john	631	Inbound	101	2018-05-08 17:30:41		Play Download
805	805	john	631	Inbound	30	2018-05-08 17:28:59		Play Download
805	805	john	631	Inbound	19	2018-05-08 17:25:47		Play Download
805	805	john	631	Inbound	55	2018-05-08 17:24:09		Play Download

Showing 1 to 8 of 8 entries — First Previous 1 Next Last

You may playback the recording for reviewing purpose or you may download the recordings for archive.

To playback a recording please press the Play button, a popup window will show as below.



Click on the 

button to start playing the recording.

To download a recording from the record list, you may click on the 

button. The downloaded recording file is in WAV format, you may playback it easily on your PC.

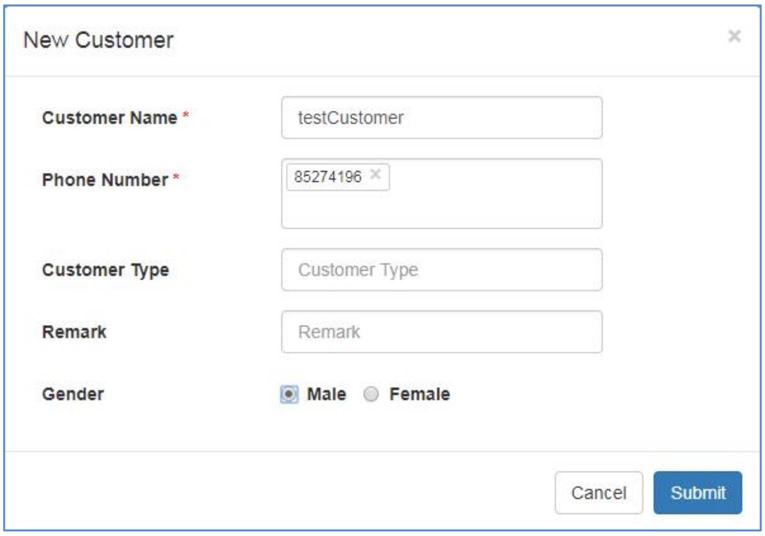
CRM

Customer Management

On the "CRM" ->"Customer Management" page, you are able to add and mange customers' contact info.

To create a new customer, please click on 

button. In the pop up dialog complete the contact info of the new customer.



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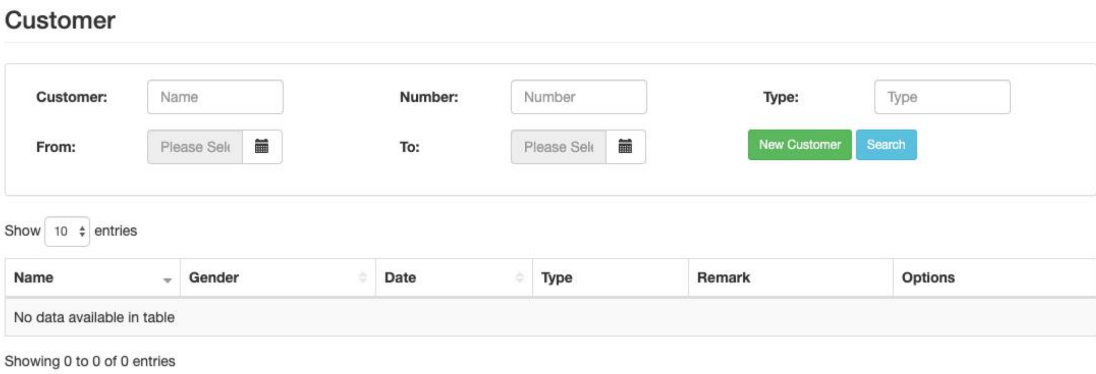
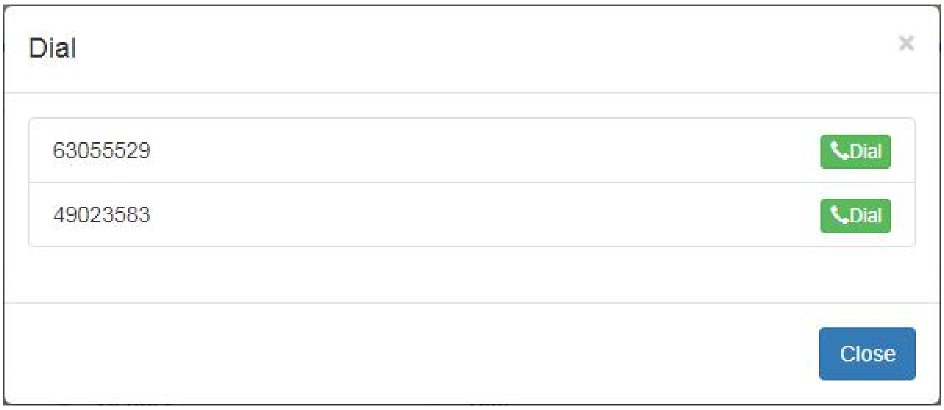
If the customer has several phone numbers, in the "Phone Number" field, you may add multiple numbers.

The customers added by you will be listed on this page.



You may change the customer contact info or dial those numbers directly by clicking on the 

button.

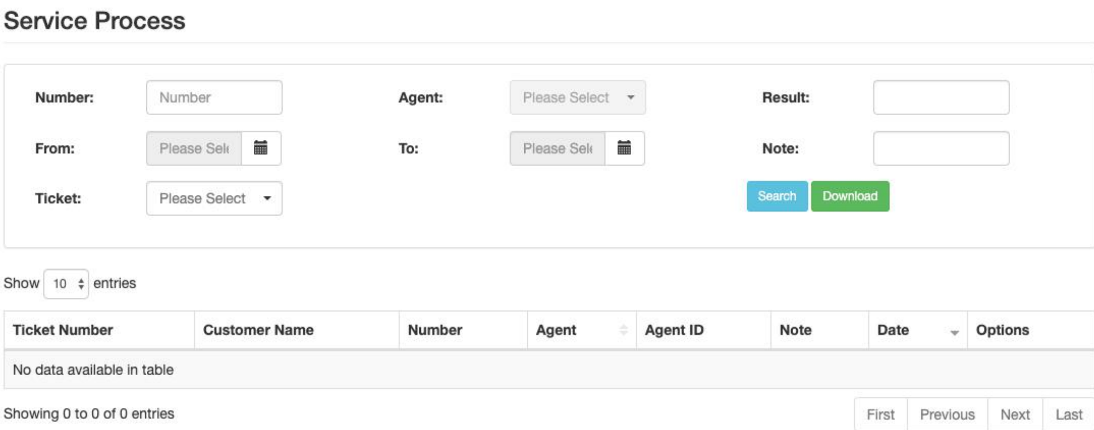


If the contact has several numbers, you'll have to choose a number to dial.

A contact once been added, you'll not be able to remove from the system. And the contacts added by you will be visible to all the supervisor agents. The supervisor agents are able to modify the contacts' info and also able to remove the contacts from the system. Other ordinary agents are not able to see the contacts added by you.

Service Process

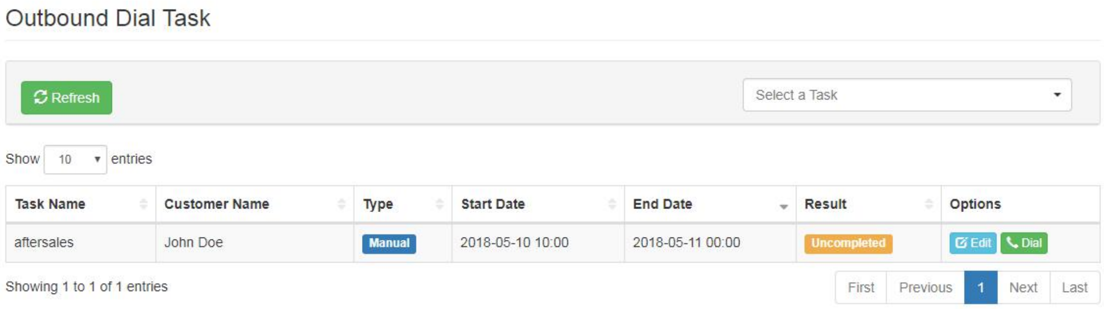
On the "CRM" ->"Service Process" page, you are able to check and edit the history of service process.



You can download the service process info.

Outbound Dial Task

Outbound Dial Tasks are created by the supervisor agents.If a task has been assigned to you, then you'll see it on the "Outbound Dial Task" page.



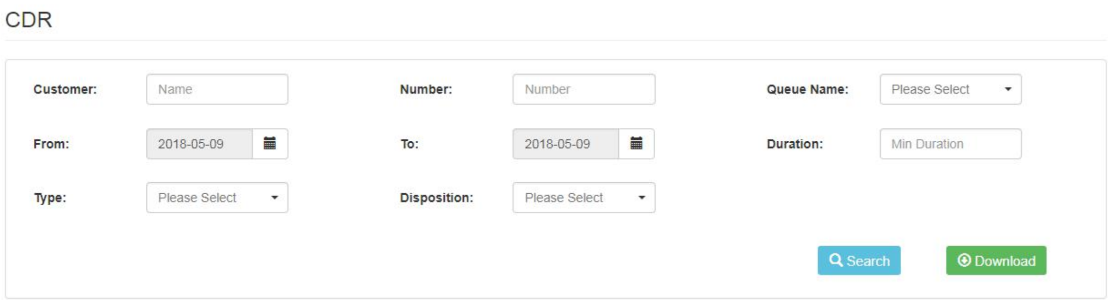
The "Start Date" and "End Date" indicates the time duration the supervisor agent wants you to make this call.

The "Result" field shows the states of the tasks. If the states of the tasks are incorrect, you may edit the tasks and change their states manually.

Statistics

CDR

On the “Statistics” ->“CDR” page, you may search all your call logs. There are several search criteria that could be used for you to search call logs you wish to view.



- The “Customer” and “Customer Number” fields could be used to search according to the name and number of the customer. You may not to specify both of them, and you may just specify part of the name or part of the number to search.
- Queue Name:Select one of the queues to search inbound calls to your extension from that queue.
- “From”and“To” fields allow you to specify a time period to search call logs of this time period.
- Duration: You may search call logs of thosecalls’ durations longer than the time of seconds you specified here.
- Type: You may search the call logs according to manually outbound dialed calls, auto outbound dialed calls and inbound calls.
- Disposition:Search according to the state of the calls, answered, unanswered or busy.

If you want to check the recording of a call, you need to do it on the “Recording List” page.

Notice:

- When the call typeis“Manual Dialed”and the “Disposition”is “Unanswered” or “Busy”, the duration refers to the ringing time.