



# CooCenter Technical Documentation



## Agent User Guide

software version v3.1.0

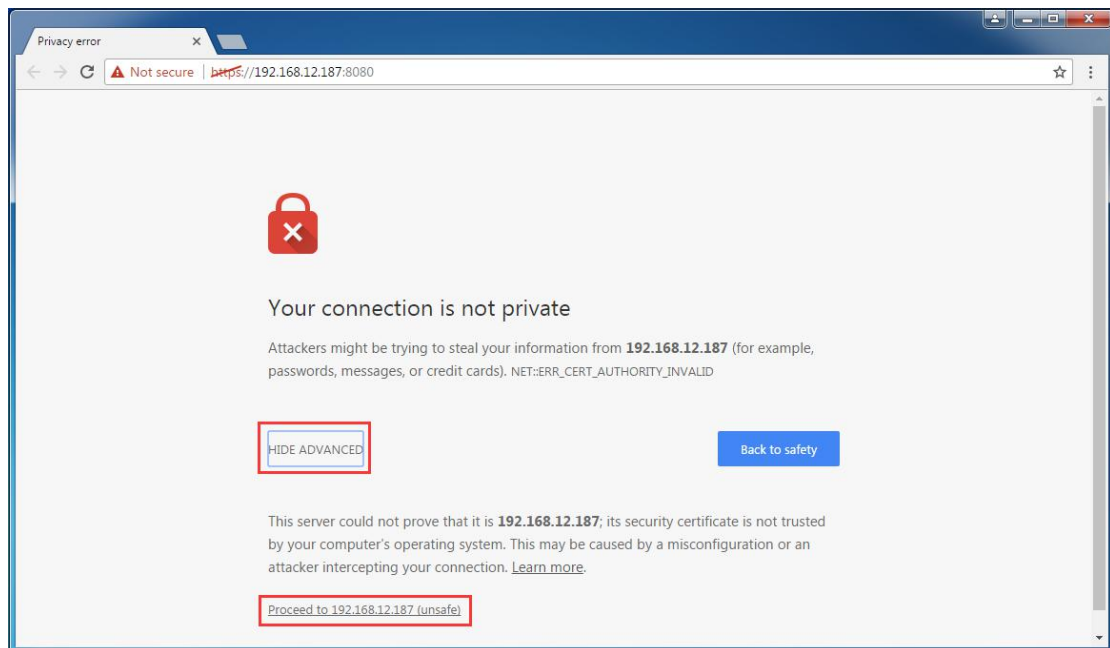
## Contents

Agent Login.....	1
Dashboard.....	2
Inbound Calls.....	6
Recording List.....	9
CRM.....	11
Customer Management.....	11
Service Process.....	12
Outbound Dial Task.....	13
Statistics.....	14
CDR.....	14

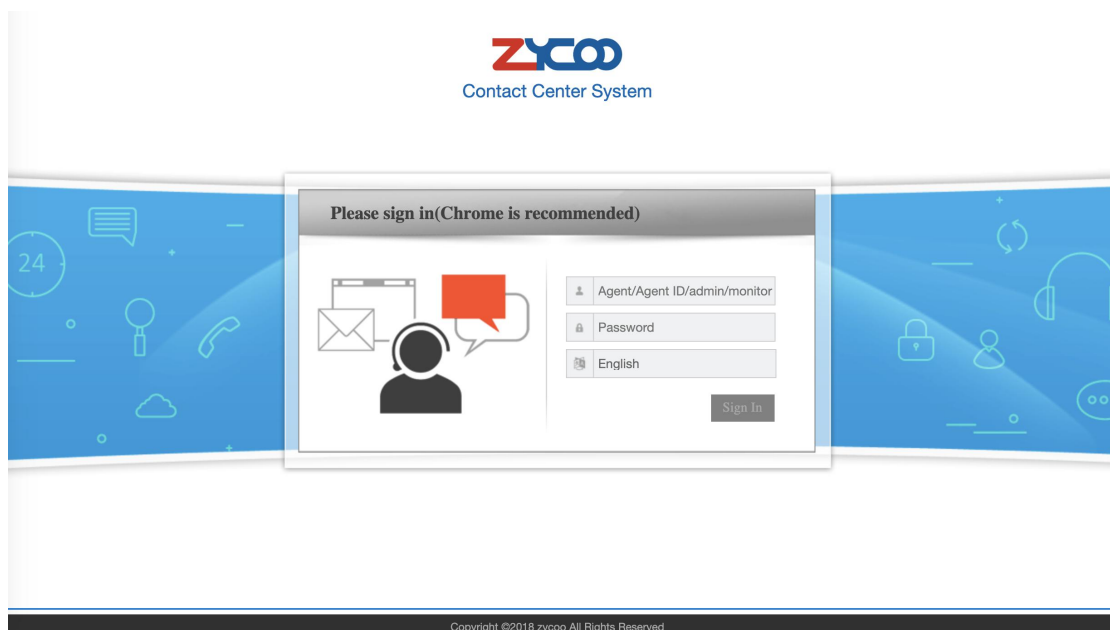
# Agent Login

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/](https://192.168.1.100:8080/ui_callcenter/), the default URL of LAN port is [https://192.168.10.100:8080/ui\\_callcenter/](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.



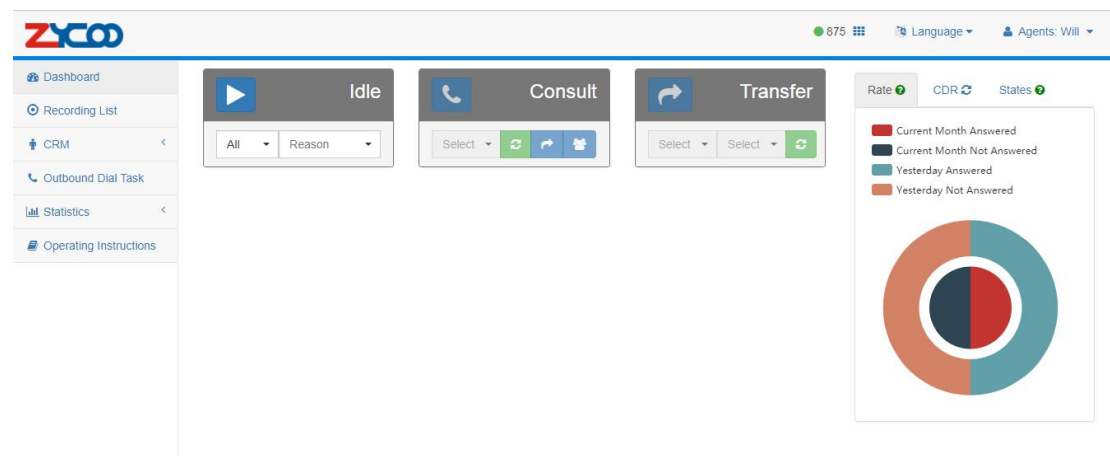
Please click on the "Advanced" option and then click on "Proceed to ..." to open the login page.



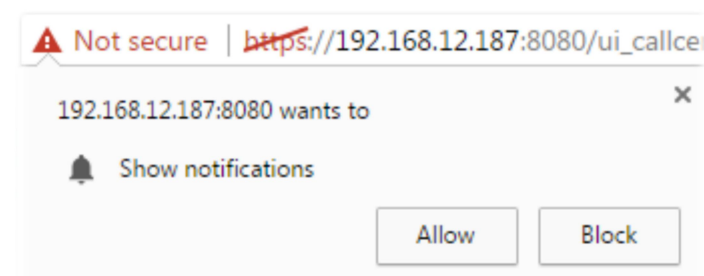
Input your agent Name or agent ID in the “Agent Name” field and your extension password in the “Password” field to sign in.

## Dashboard


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



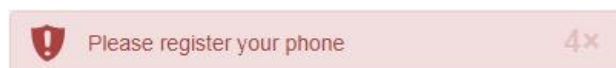
If on the dashboard screen, you see a notification as below.



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.



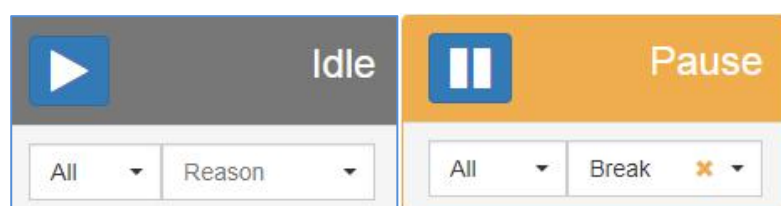
Please register your extension on an IP phone or please contact the system administrator.



If your 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, your phone will ring, after you pick up the phone the call will start dialing out.

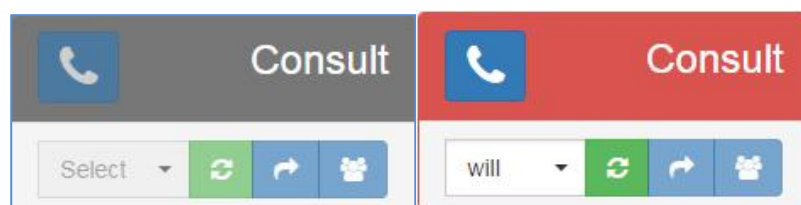
### State Change Module





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 your 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.

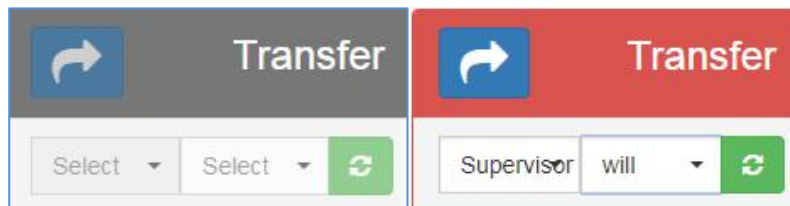
- **Consult transfer:** After the dialed supervisor answered your call, you may introduce



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

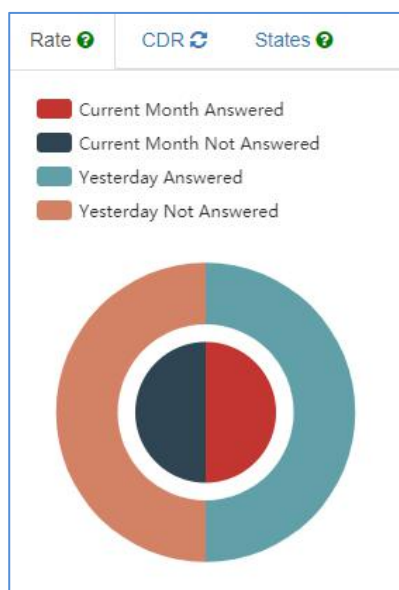
Call Transfer is used to transfer a call from call queue to some other destinations.



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.

Rate ?	CDR ↺	States ?
805	Inbound	
Duration: 624s	2018-05-08 17:35:14	
805	Inbound	
Duration: 101s	2018-05-08 17:30:51	
805	Inbound	
Duration: 30s	2018-05-08 17:29:14	
805	Inbound	
Duration: 21s	2018-05-08 17:25:13	
805	Inbound	
Duration: 55s	2018-05-08 17:24:18	

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

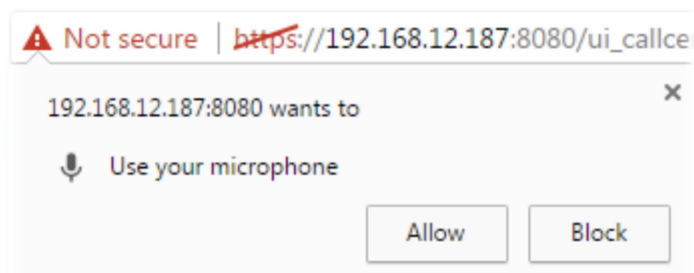
When you have received an inbound call, there will be a notification on your desktop as shown below.



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.

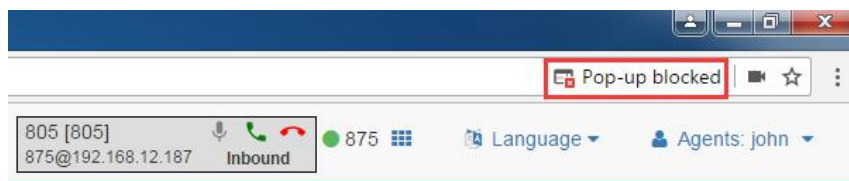


Please click on the “[Allow](#)” button then you’ll be able to talk to the caller, otherwise the caller will not be able to hear your voice.

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 pup up window, and you may also make a “[Callback Plan](#)” of this customer as below.

CDR

History

Callback Plan

Remind Date:

mm/dd/yyyy

Remind Time:

--:-- --

Customer Name:

Remark:

Submit

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

### SIP (IP Phone) Extension

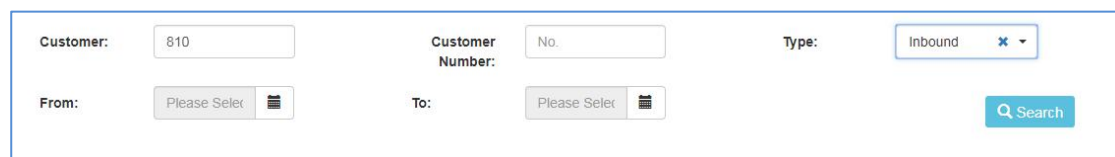
If you are using a desktop IP phone or softphone instead of web extensions, your phone will ring upon incoming calls.

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.



The search filters include:

- Customer:** Input field with value "810".
- Customer Number:** Input field with value "No.".
- Type:** Dropdown menu with value "Inbound".
- From:** Date range selector with "Please Select" and a calendar icon.
- To:** Date range selector with "Please Select" and a calendar icon.
- Search:** A blue button with a magnifying glass icon and the text "Search".

- 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 recordings of 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 and in the “To” field set the end time to search recordings in this time period.
- In the “Type” field select the call type. Include Inbound, Auto Dialed or Manual Dialed.

Search results will be shown as below diagram.

Show 10 entries

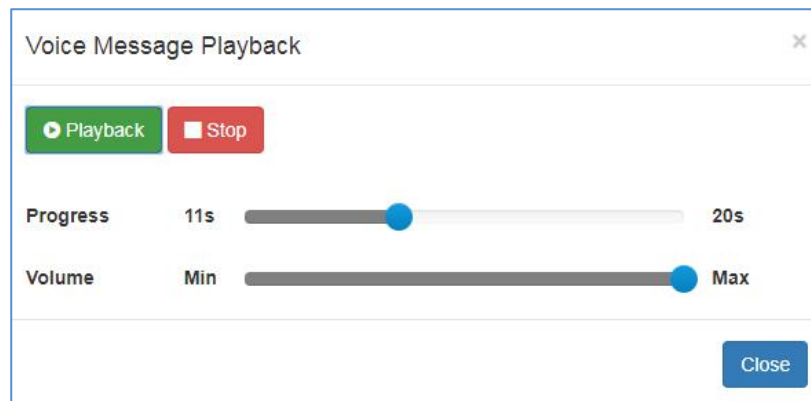
Customer Name	Number	Agent Name	Queue Name	Type	Record Duration(s)	Date	Note date	Options
805	805	john	631	Inbound	46	2018-05-09 11:16:02		<a href="#">▶ Play</a> <a href="#">⬇ Download</a>
805	805	john	631	Inbound	41	2018-05-09 11:13:39		<a href="#">▶ Play</a> <a href="#">⬇ Download</a>
805	805	john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


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.

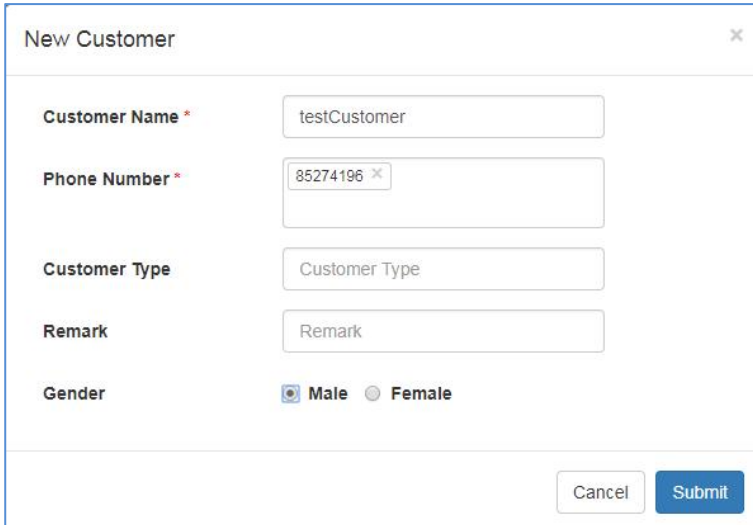
To download a recording from the record list, you may click on the  button. The downloaded recording file is in WAV format, you may playback it easily on your PC.

# CRM

## Customer Management

On the “CRM” ->“Customer Management” page, you are able to add and manage 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.



A modal dialog box titled "New Customer" with a close button (X) in the top right corner. It contains the following fields:

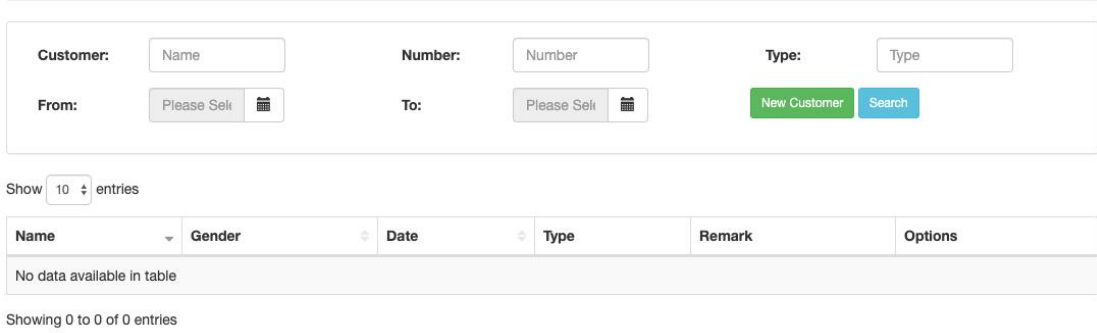
- Customer Name \***: A text input field containing "testCustomer".
- Phone Number \***: A text input field containing "85274196" with a small 'x' icon to clear the field.
- Customer Type**: A text input field containing "Customer Type".
- Remark**: A text input field containing "Remark".
- Gender**: Two radio buttons, "Male" (selected) and "Female".

At the bottom right of the dialog are two buttons: "Cancel" and "Submit".

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.

### Customer




The Customer Management interface includes a search bar at the top with fields for "Customer:" (Name), "Number:" (Number), and "Type:" (Type). Below these are "From:" and "To:" fields, each with a "Please Select" button and a dropdown icon. To the right of these fields are two buttons: "New Customer" (green) and "Search" (blue).

Below the search bar, there is a "Show" dropdown set to "10" and the text "entries".

Name	Gender	Date	Type	Remark	Options
No data available in table					

At the bottom, it says "Showing 0 to 0 of 0 entries".

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

Dial
×

63055529

Dial

49023583

Dial

Close

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.

### Service Process

Number:

Number

Agent:

Please Select

Result:

From:

Please Sel

To:

Please Sel

Note:

Ticket:

Please Select

Search

Download

Show 10 entries

Showing 0 to 0 of 0 entries

First
Previous
Next
Last

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.

## Outbound Dial Task

Refresh

Select a Task

Show 10 entries

Task Name	Customer Name	Type	Start Date	End Date	Result	Options
aftersales	John Doe	Manual	2018-05-10 10:00	2018-05-11 00:00	Uncompleted	<div>Edit</div> <div>Dial</div>

Showing 1 to 1 of 1 entries

First

Previous

1

Next

Last

The “[Start Date](#)” and “[End Date](#)” indicates the time duration the supervisor agent wants you to make this call.

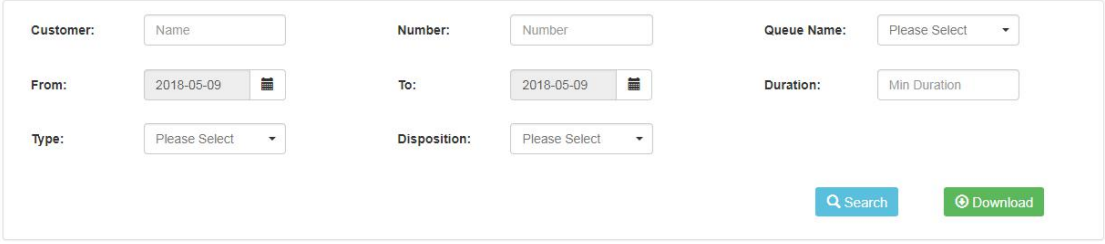
The “[Result](#)” field shows the states of the tasks. If the states of the tasks are incorrect, you may edit the tasks and change their states manually.

# 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.

### CDR

A screenshot of the CDR (Call Detail Record) search interface. It features a grid of search filters: 'Customer' with a 'Name' text input, 'Number' with a 'Number' text input, 'Queue Name' with a 'Please Select' dropdown, 'From' with a date picker set to '2018-05-09', 'To' with a date picker set to '2018-05-09', 'Duration' with a 'Min Duration' text input, 'Type' with a 'Please Select' dropdown, and 'Disposition' with a 'Please Select' dropdown. At the bottom right, there are two buttons: a blue 'Search' button with a magnifying glass icon and a green 'Download' button with a download icon.

- 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 those calls’ 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 type is “[Manual Dialed](#)” and the “[Disposition](#)” is “[Unanswered](#)” or “[Busy](#)”, the duration refers to the ringing time.