eSIP Evolution Series
QueueMetrics Agent User Guide

The purpose of this document is to provide instruction on the Agent Desktop for QueueMetrics contact center management software (developed by Loway) for eSIP.

Contents

Introduction

The QueueMetrics Agent Web User Interface provides a complete environment for agents handling calls in a queue or multiple queues. Through the web user interface, the agent can:

- Login and Logout of the web user interface
- Login and Logout of queues
- Temporarily stop taking calls by going on pause with a specified pause code
- See the status of the current call
- See statistics on all calls taken
- Enter call wrap-up information
- Make outbound calls

Logging In

To log into the QueueMetrics web user interface go to the URL provided by your supervisor.
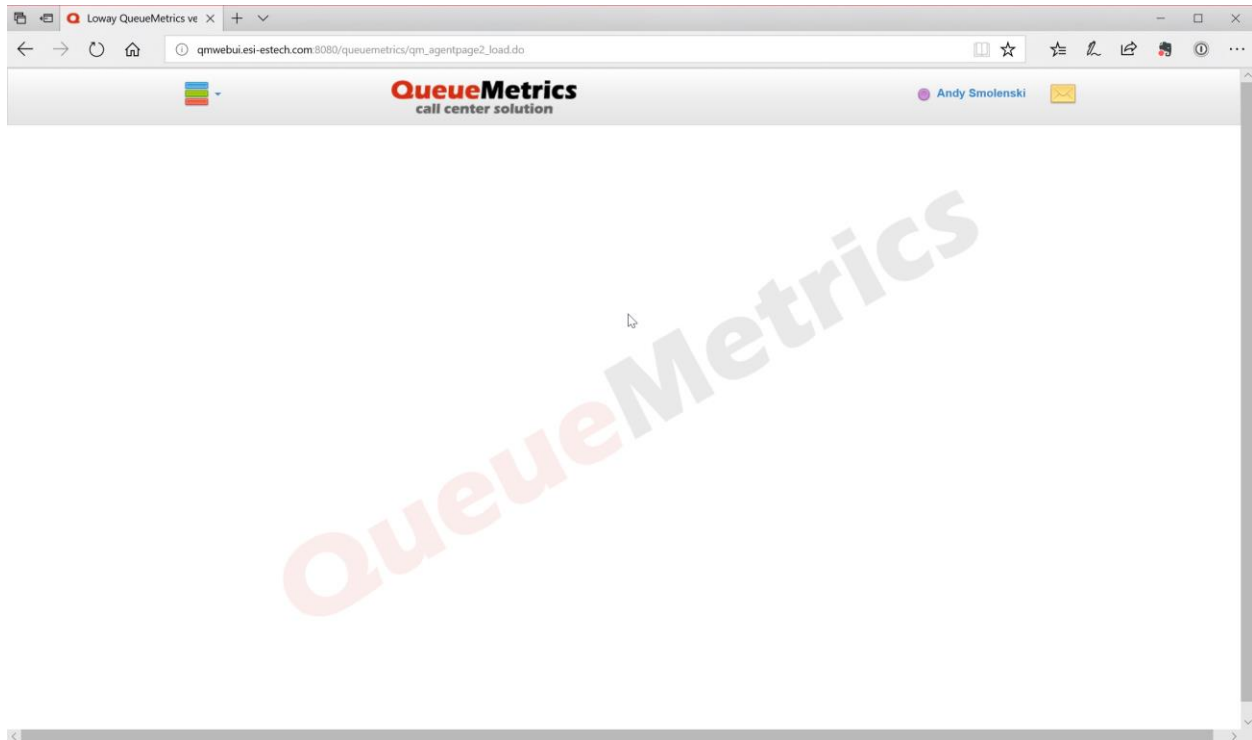
You will see the following screen:
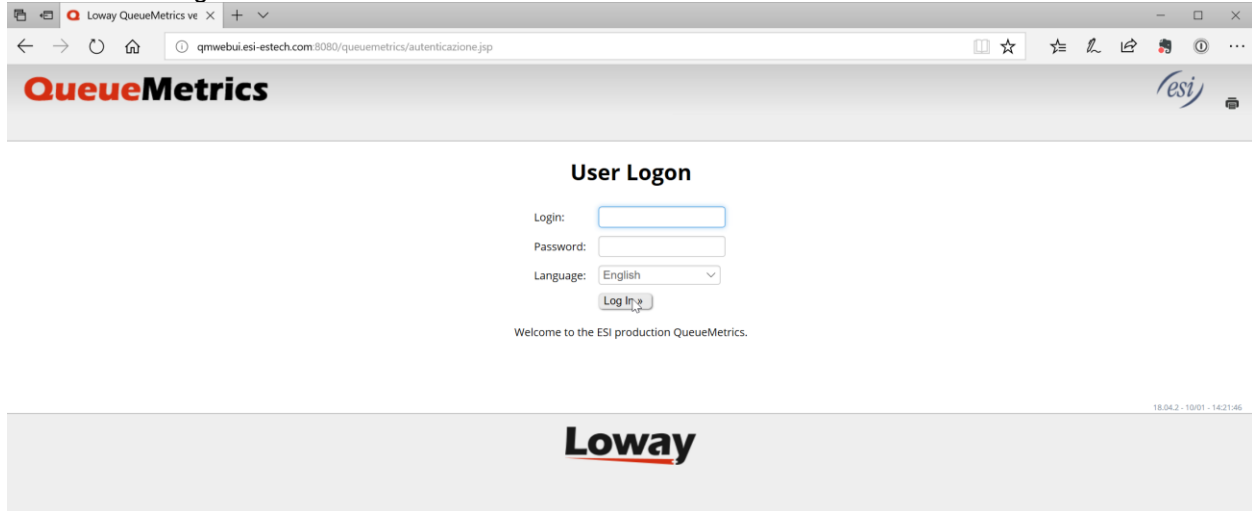
Enter the Username and Password provided by your system administrator

Main Screen

The first time you login you will be presented with the main QueueMetrics Agent interface as shown below. On your initial login there are no open windows. On subsequent logins any windows left open from the previous login will be open.

Opening Windows

To open windows in the interface click on the 3 colored bars on the upper left of the screen to bring up the window menu.
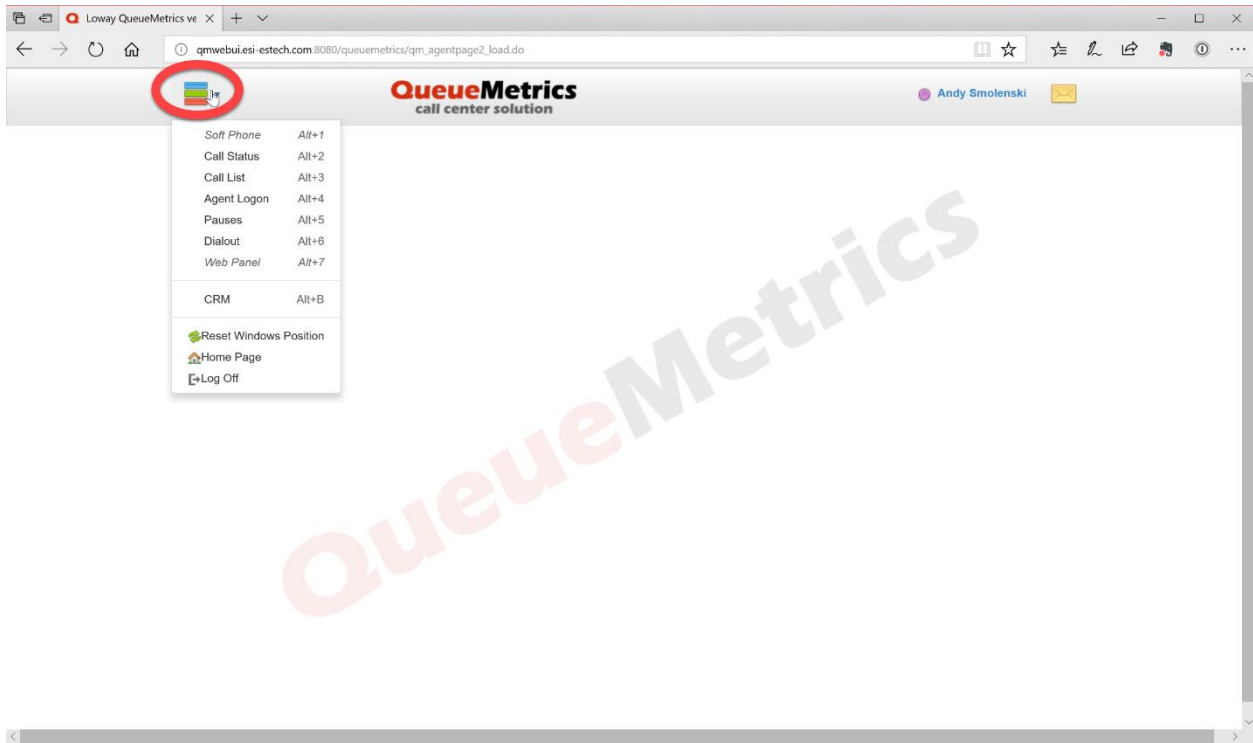

Each of the windows in the interface gives you access to functions you will use throughout your shift to manage the queues you are logged into, manage calls, go on pause, and enter outcome / wrap up codes.

- Soft Phone – Opens the softphone window to make and receive calls via your desktop. (May not be available in your installation)
- Call Status – The call status window, populated when the call is answered with information about the current call.
- Call List – A list of all calls taken during the current day.
- Agent Logon – The list of queues available and controls to login and logout of queues.
- Pauses – A dropdown list of pause codes to stop taking calls for a period of time without logging out of queues.
- Dialout – Dialog box to enter a campaign and number to be dialed for outbound dialing.
- Web panel – (May not be available in your installation)
- CRM – (May not be available in your installation)
- Reset Windows Position – Repositions all windows so that each is visible (depends on browser window size).
- HomePage – Takes you to the main QueueMetrics home page.
- Logoff – Logs you off the Agent UI

Agent Logon

The first thing you will want to do when logging into QueueMetrics is to logon to your queue or queues. You do this from the Agent Logon Window. Note, the first time you login to the system the field for your extension will be red. You cannot login to a queue until you fill in this box with your extension number. Once you do that the first time the system will remember your extension.
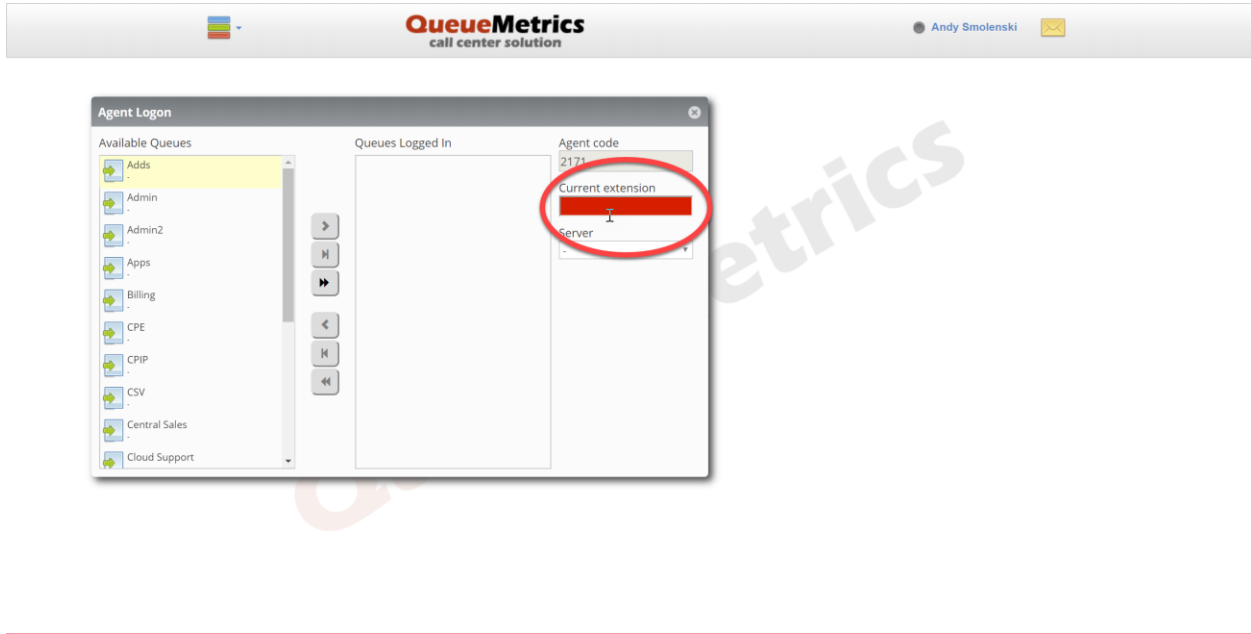

Once you have filled in your extension you can login to your queue or queues. The simplest way to do this is to click on the middle right arrow as shown below. This will log you into all of the queues that have been assigned to you. You can also select individual queues and login with the upper right arrow, or logon to all queues with the bottom right arrow.

You will know you have successfully logged on to your queues when you see them move to the right hand column in the
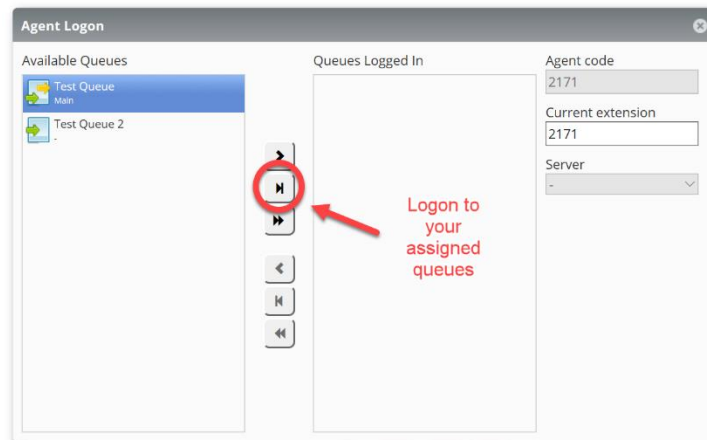
Agent Logon window.
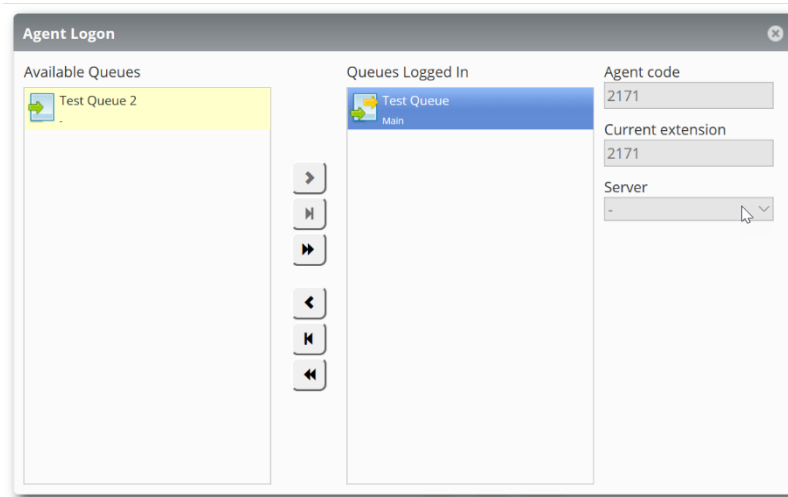
You will also notice that the status light in the upper right next to your name has changed to green, indicating you are logged on to your queues and are ready to take calls. If you hover over the light with your mouse you will see additional information.

To logout of your queue or queues at the end of your shift click on the lower left arrow and you will be logged out of all queues. You will see the queues shift back to the left hand column.

Call List

The call list shows a list of the calls you have taken since the beginning of the day.
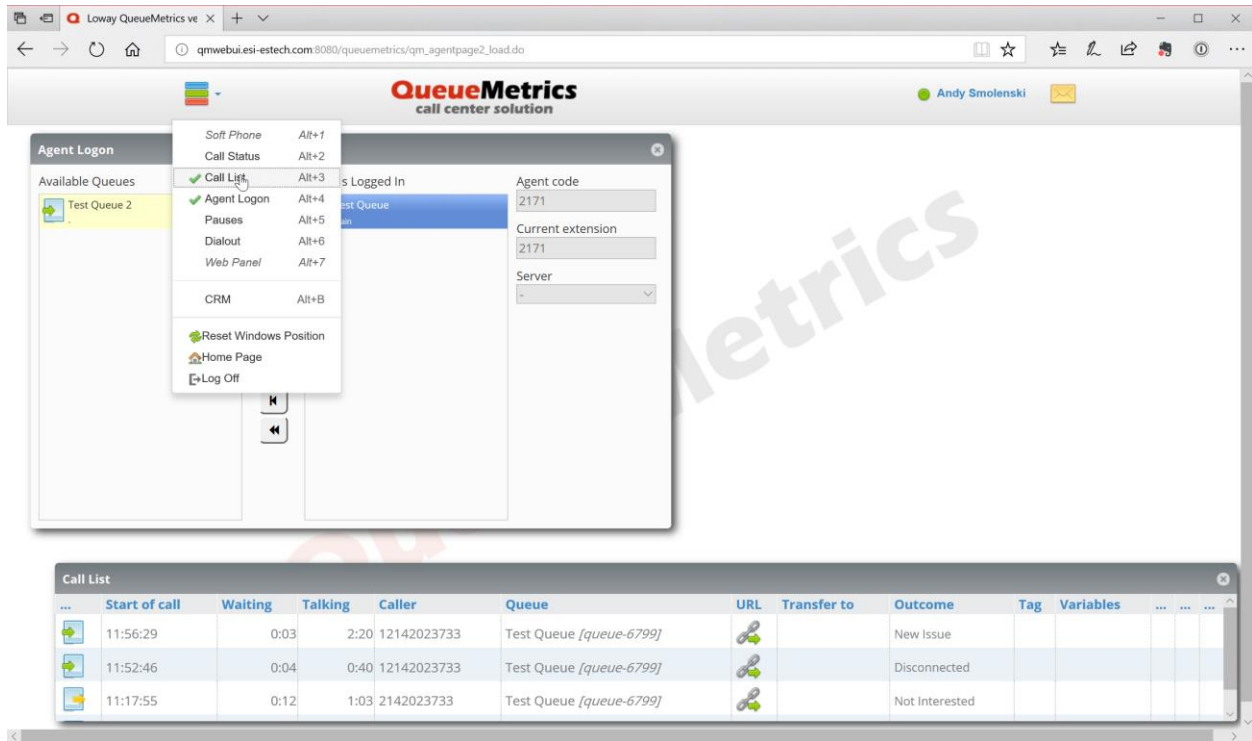
In this window see each call, if it was inbound or outbound, how long the caller was waiting in the queue, how long you were connected, the caller ID, the queue, (the URL field may not be applicable in your configuration), if you transferred the call, the queue or extension it was transferred to, any outcome code you entered, and the ability to tag the call (more on that later), and any variables set for the call.

Pauses

You need to tell the system not to send calls to you when you are away from your desk or doing other tasks and are unable to take calls. You do this through the pause window.
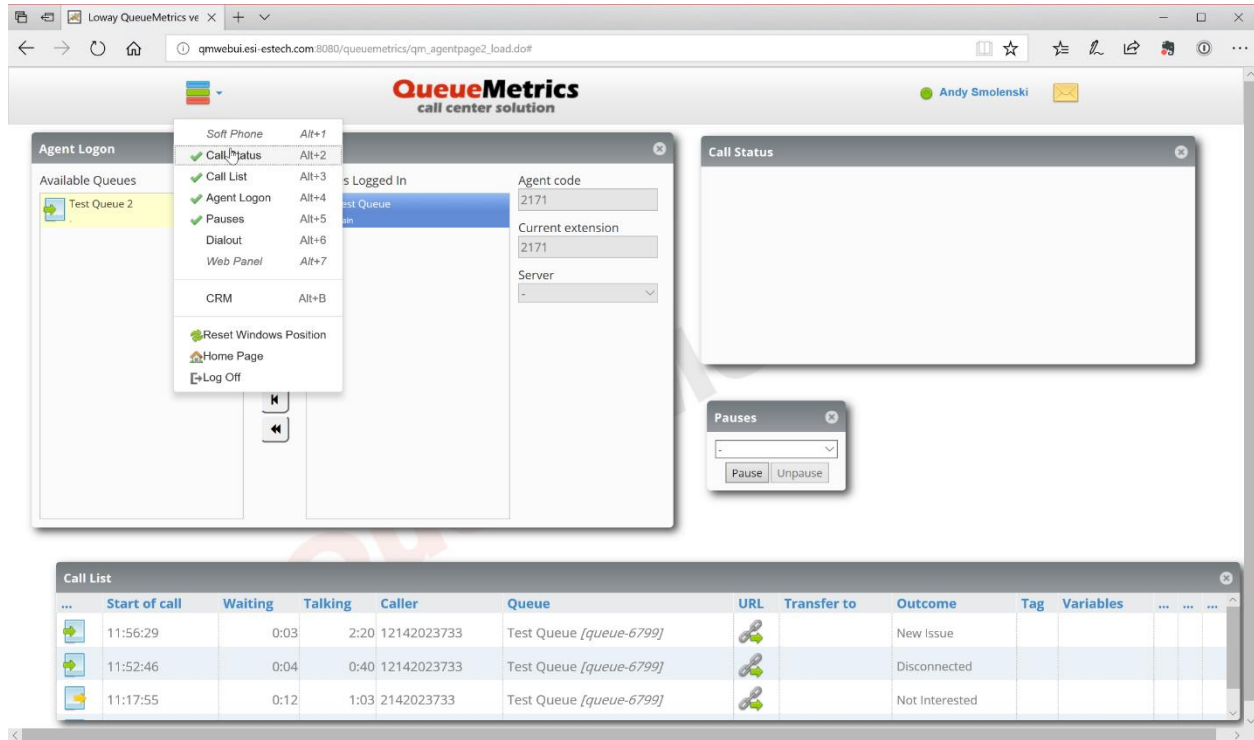

To go on pause select the appropriate code from the drop down menu and click on pause. At that point you will see the status light on the upper right change from green to red indicating you are not taking calls and the reason for the pause.

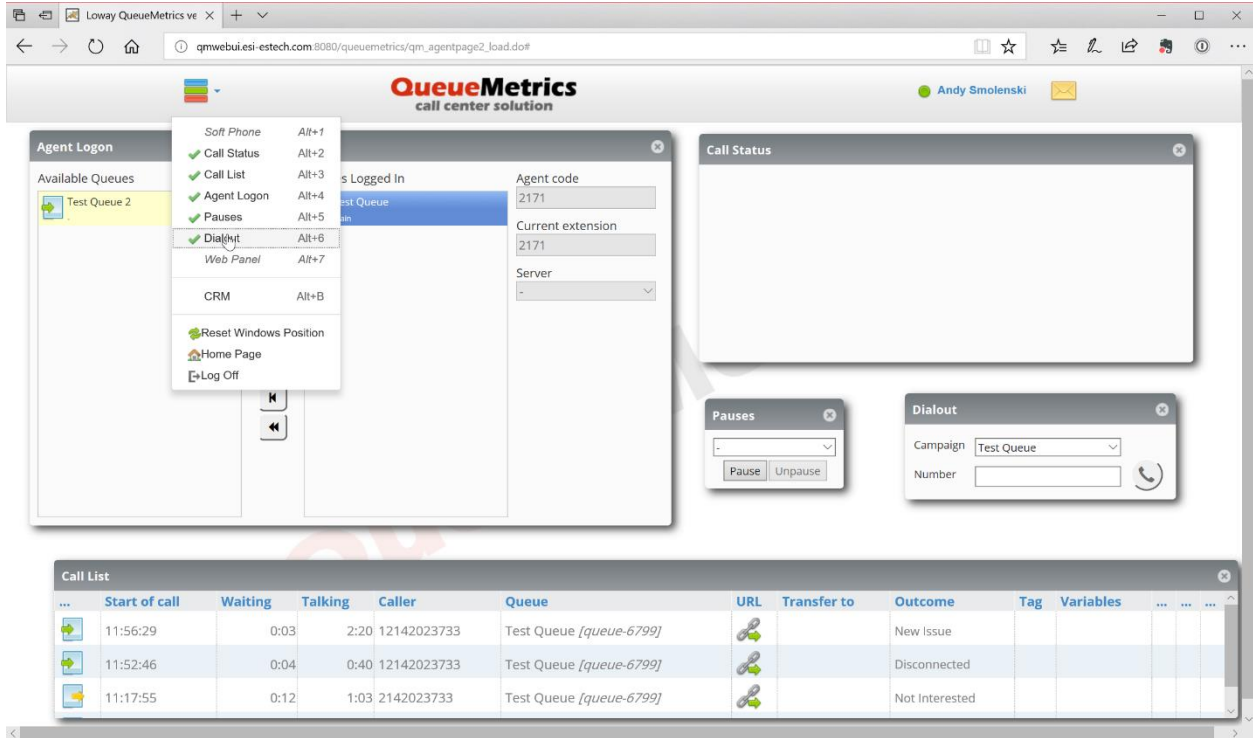When you are ready to resume taking calls click on the unpause button.

Call Status

When you are not on an active call the call status window is blank.

The call status window will populate once you answer the call.
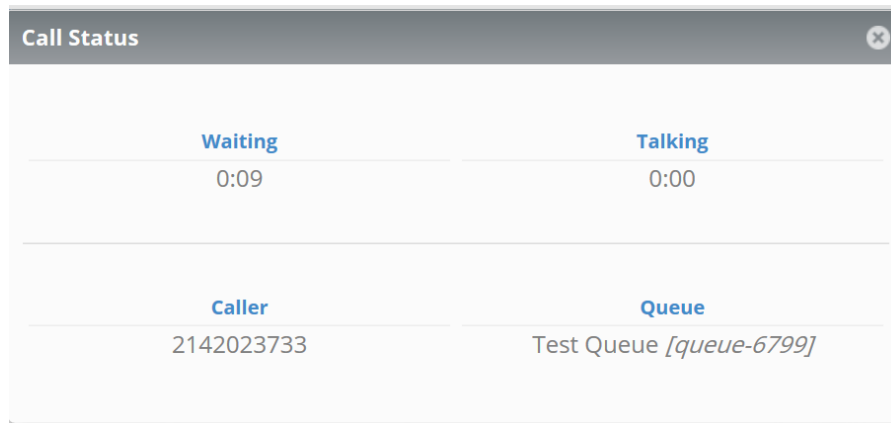
Dialout

The Dialout window allows you to make outbound calls, if they are enabled on a queue or queues that you are logged into.


To make an outbound call select the campaign (queue) to use for the call and enter the phone number. The handset button will change color to green. When you click on the handset button your extension will ring, when you pickup your extension the number entered in the Dialout window will be called.
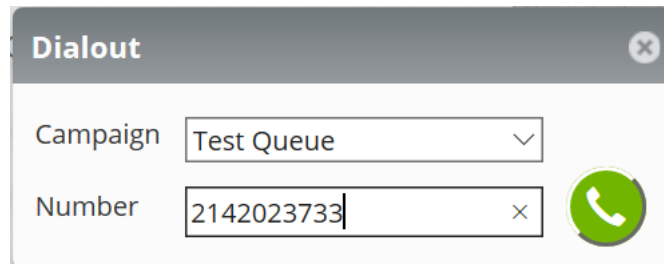
Handling Inbound Calls

So now you are logged in to QueueMetrics, and your logged into your queues. Now what happens? When a call comes into one of your queues the switch will decide which of the available agents will take the call. Your extension will ring. Once answer the call the Call Status and Call list windows will populate.
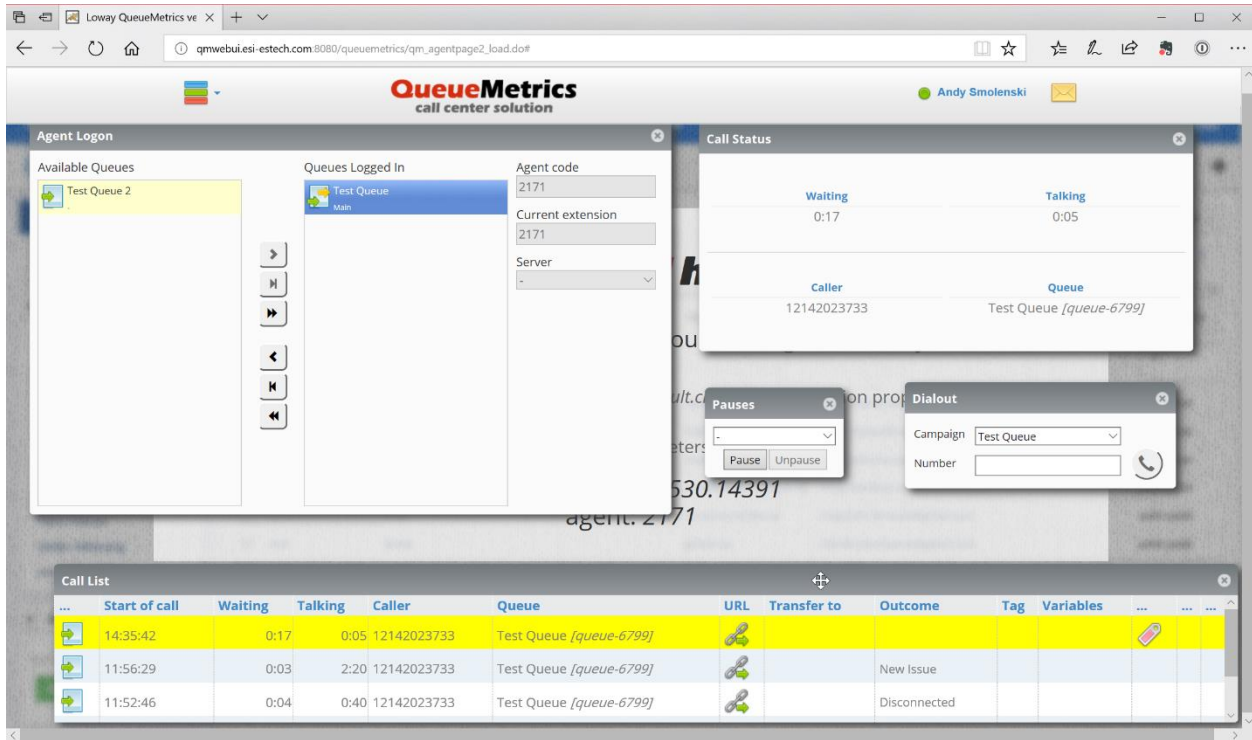

During the call you don't need to do anything with the QueueMetrics system. If you need to transfer the call you will do that with the transfer button on your phone. If your department is not using wrapup or outcome codes you don't have to do anything at the end of a call, just hang up your extension and you will be ready for the next call.

Outcome / Wrap up Codes

If your department is using outcome or wrap up codes you can enter that code dring the end of the call, while you are still on the phone with the caller or after you end the call and hang up. To enter an outcome / wrapup code you click on the red tag that appears in the column to the right of the variables column in the call list.
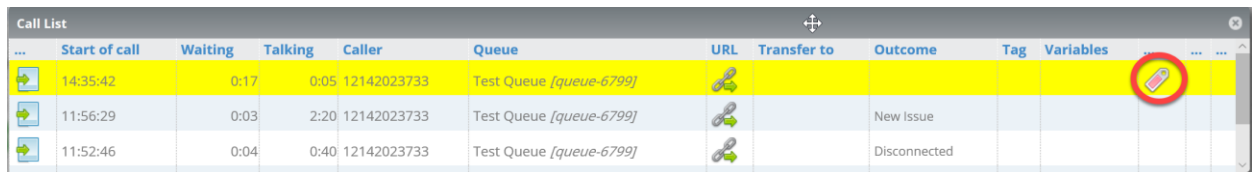
Clicking on this tag brings up the Outcomes window.
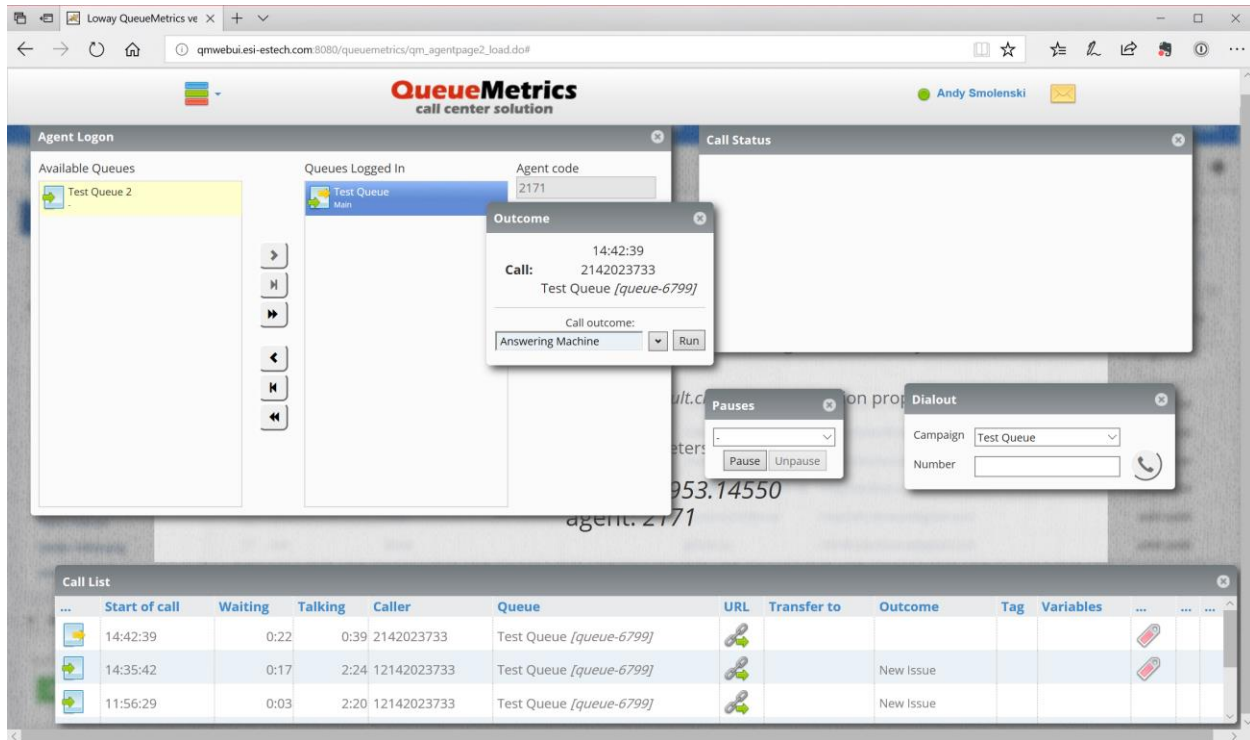
Select the appropriate outcome from the drop down list and press run to set the outcome code.

You have the ability to set outcome codes for the last 2 calls. You will not be able to set outcome codes for calls prior to the last 2.

Call Queue Call Back Feature

Rules
- This feature can be configured by users with a scope of Call Center Supervisor and above.
- The maximum callback limit can be set between one hour and eight hours; in one-hour increments.
- The default maximum callback limit is two hours.
- The responder application associated with call queue callback is **Callback Queueing**.
- In order for this feature to function correctly a "Forward No Answer" Answering Rule cannot be present on the Call Queue User.
- There are specific Speech Words that must be present for this feature to work. These files are shown below.
  Note: These phrases can be re-recorded if desired.

Audio Filename	Audio Filename Description
phrase-queue-option-vmail.wav	Press 2 to leave a voicemail.
phrase-queue-option-callback.wav	Press 3 to keep your place and receive a call back when an agent is available.
phrase-queue-options-prompt.wav	Press the pound key to return to the queue, or you can hang up any time.
phrase-callback-number-is	Please confirm your callback number is.
phrase-callback-number-confirm	Press 1 to confirm and 2 to enter a different call back number.
phrase-callback-number-prompt	Please enter your call back number followed by the pound key.
phrase-callback-thank-you	Thank you. We will call you back as soon as an agent becomes available.
announce-callback-to-agent	We are connecting you to a customer.

Procedure
Set up the Feature in the Admin UI
1. In the Admin UI of the Core Module, navigate to **System > Settings > Advanced > UI Config** and add the following UI configuration(s).

UI Configuration Parameter	Default Value	Description
PORTAL_CALL_QUEUE_CALLBACK_ALLOW	No	Display the call queue callback option in the **Pre Queue Options** tab of the call queue configuration page.
PORTAL_CALL_QUEUE_CALLBACK_DEFAULT_MAX_HOUR	2	The default maximum callback time in hours.

2. If you want to set the maximum callback limit to a value other than the two-hour default follow these steps:
   a. In the Admin UI of the Core Module navigate to **Applications > Call Queues** and click on **EDIT** next to the queue name.
   b. In the Callback Limit (hr) drop down box select the limit for the callback. Note: To disable the feature set the **Callback Limit** to **Disabled**.

Note: If no agents are logged into the Call Queue and Callback is enabled the call will remain queued until the Callback Limit is reached, as configured.

Configure the Settings in the Manager Portal
1. Log in to the Manager Portal with a scope of Call Center Supervisor or above and select **Call Queues**.
2. Double-click the name of the queue to which you want to add the feature.
3. In the **Edit New Queue** window select the **Pre Queue Options** tab.
4. Set **Allow Callback** to **Yes**. Press **Save** to Continue.

Call Flow
With this feature enabled a caller to a queue is presented with the following options; if all agents are on a call.
Note: The Call Queue Callback Prompt will be presented after the Ring For Timeout has been reached.

1. The caller is asked to leave their call back number and save their place in line or to continue waiting.
2. If the caller chooses to leave their number they will be asked to confirm the number and told they will receive a call from the next available agent.
3. When an agent becomes available they are notified that they are going to be connected to the caller that requested the callback.

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Troubleshooting Table

Troubleshooting Table	
1. How do you tell if the feature works and if it is set up correctly?	1. If the caller is prompted to leave call back number when calling the queue. 2. If the agent receives a callback and the caller is connected to the agent.
2. What to check if the feature doesn't work?	• The UI version is 1225 or greater. Configuration is set as described above. Check that Allow Callback option is set to **Yes** on the Pre Queue tab of the Call Queue in the Manager Portal. • Ensure that there is not a "Forward No Answer" Answer Rule on the Call Queue User.
3. What are the first set of Troubleshooting steps?	1. Verify that UI version is 1225 or greater. 2. Check that the Callback Limit is not set to "disabled" for the Call Queue. 3. Check that UI Configs are properly installed. 4. Review call trace of affected call.
5. Are there any backward compatibility issues?	• This feature is not available in previous versions of the software. The UI version which is required must be 1225 or greater.