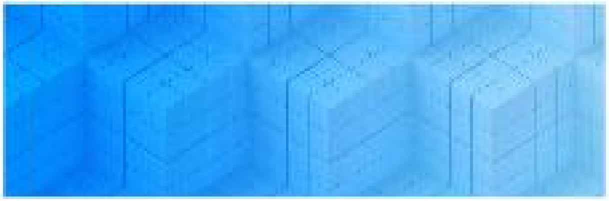
CooCenter
Technical Documentation



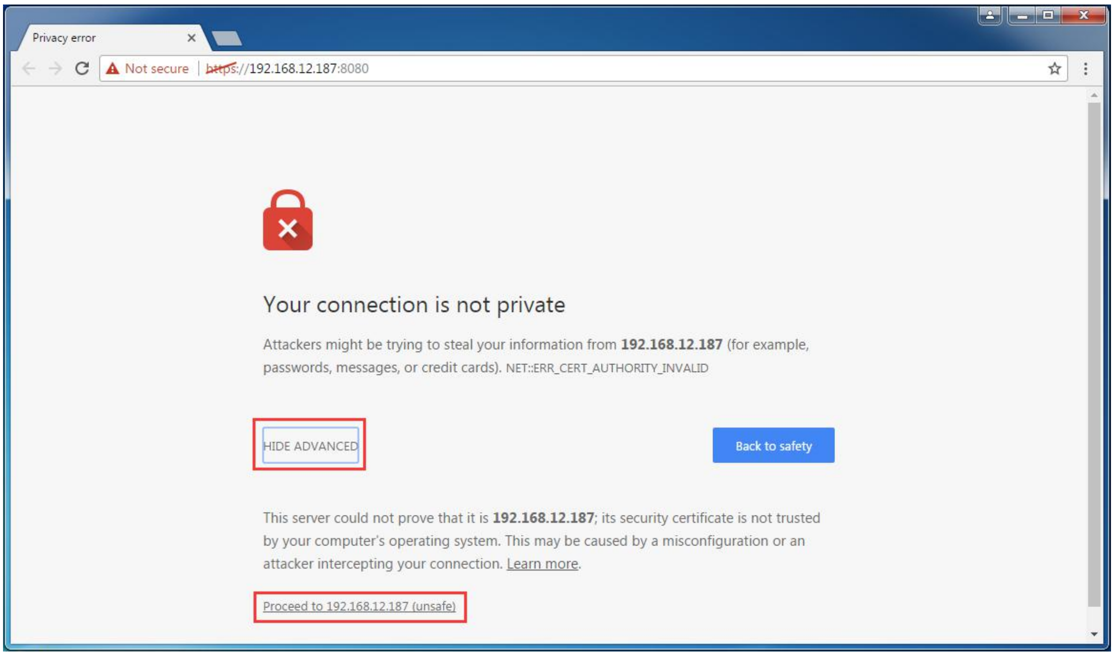
Supervisor User Guide

software version v3.1.0

Contents

Supervisor 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.

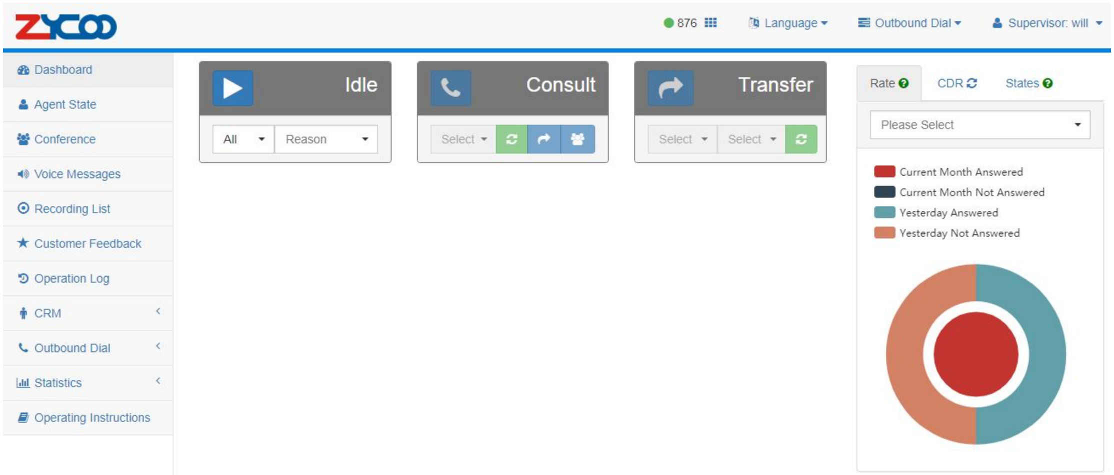


Please click on the “Advanced” option and then click on “Proceed to …” to open the login page.

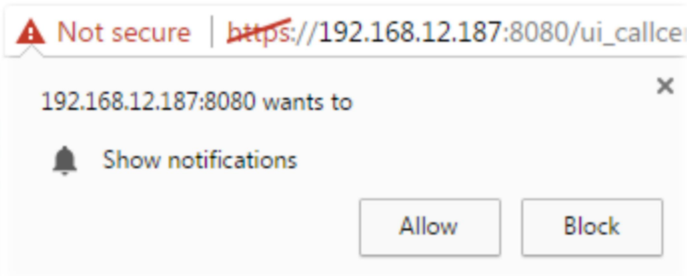
Input your agent Name or agent ID in the “Agent Name” field and your extension password in the “Password” field to sign in.

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.

When you see this message, 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.

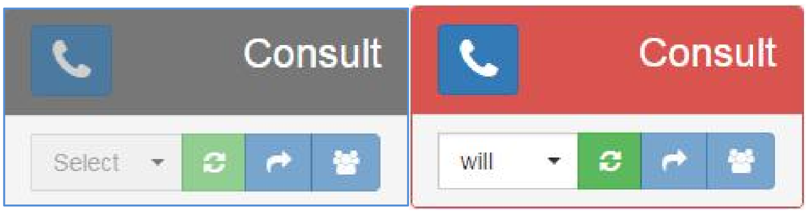
Now you click on the icon and dial a number, you phone will ring, after you pick up the phone the call will start dialing out.

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.



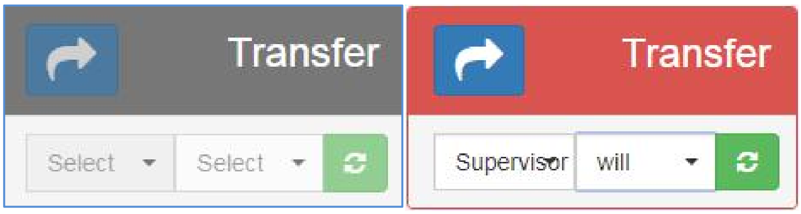
Before you perform a consult call, click on button to see which supervisors are available first, and then choose a desired supervisor, then click on to call this supervisor.

- 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

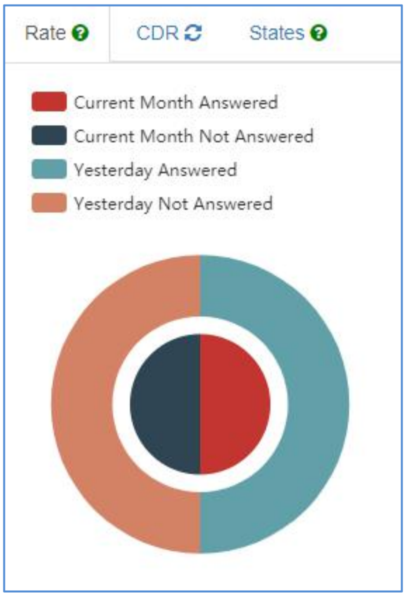
Call Transfer is used to transfer a call from call queue to some other destinations.



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".

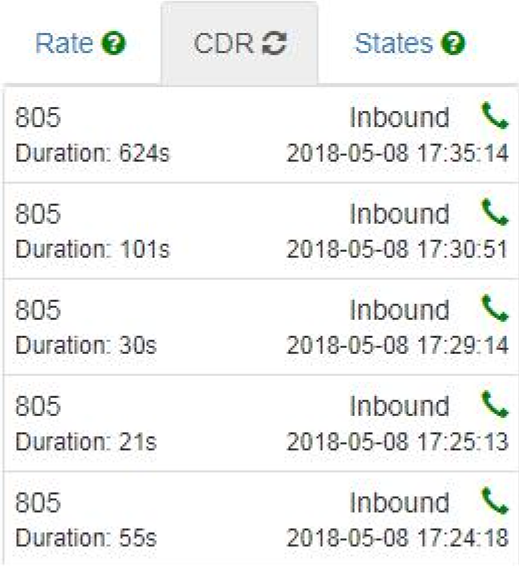
Rate



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.

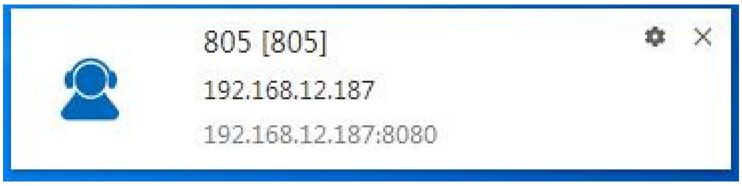
States

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.

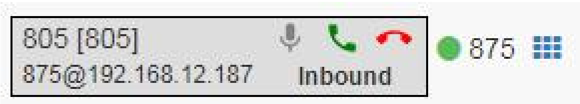
Inbound Calls

Web Extension

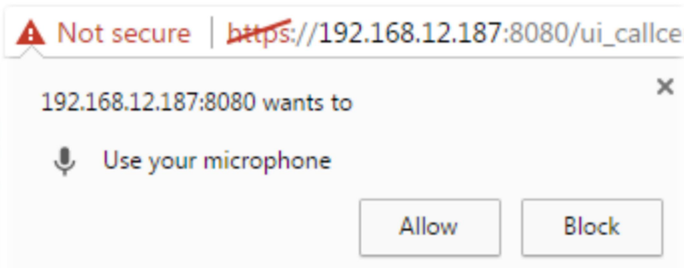
When you have received an inbound call, there will be a notification on your desktop as shown below.



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.

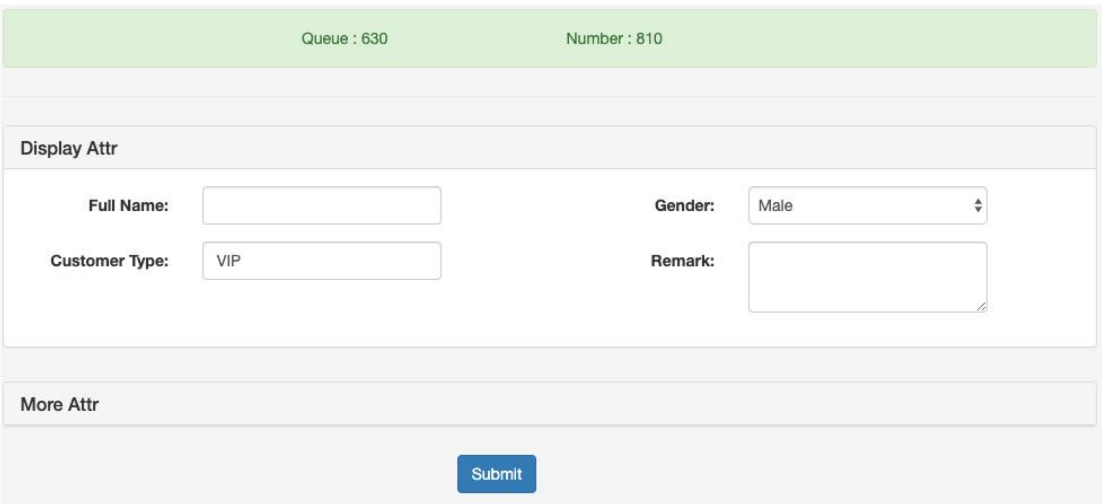


By clicking on the button to answer the call or button to decline the incoming call. You'll see a notification asking for microphone permission if you answer incoming call for the first time.



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.

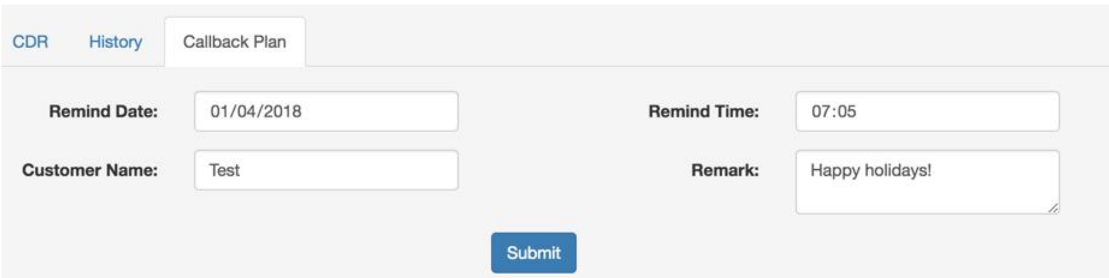


If you didn't see the pop up window, please check if it's your browser had blocked the pop up window like shown below.

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.

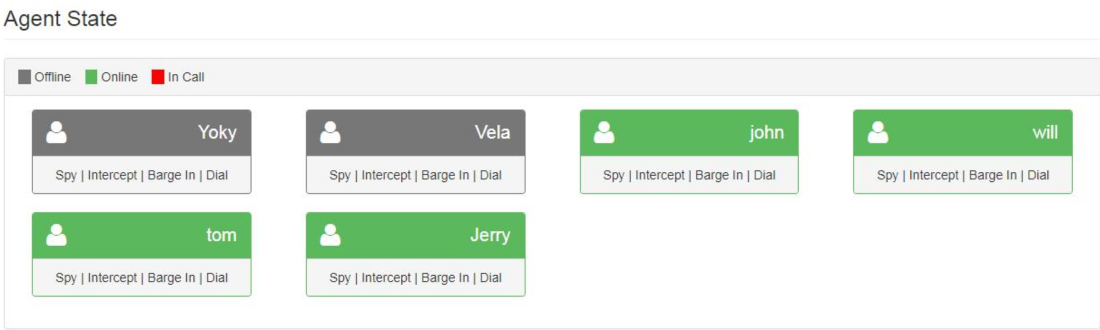
SIP (IP Phone) Extension

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.

Agent State

As a supervisor agent, you may monitor all agents' states on the "Agent State" page.



There are 3 possible states of each agent.

- Offline: Agent extension has not been signed on yet.
- Online: Agent is available for phone calls.
- In Call: Agent is busy.

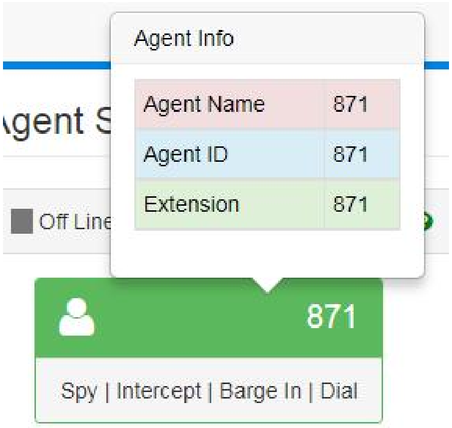
Agent Call Manipulation

As a supervisor agent, you are allowed to manipulate phone calls of other agents.

- Spy: If one agent is talking to someone on the phone, you can listen to their conversation by clicking on"Spy".However, neither speaker will be able to hear you.
- Intercept: This feature allows you to terminate this conversation directly.
- Barge In:Barge spy is similar to an instant 3-way conference call.If one agent is talking to someone on the phone, you may click on "Barge In" to barge in this call and talk to both of them.
- Dial: This feature allows you to dial the agent directly when the agent is idle.

Agent Info

If you want to get more information of the agent, please move your cursor to the agent name, and then it will show details of this agent.

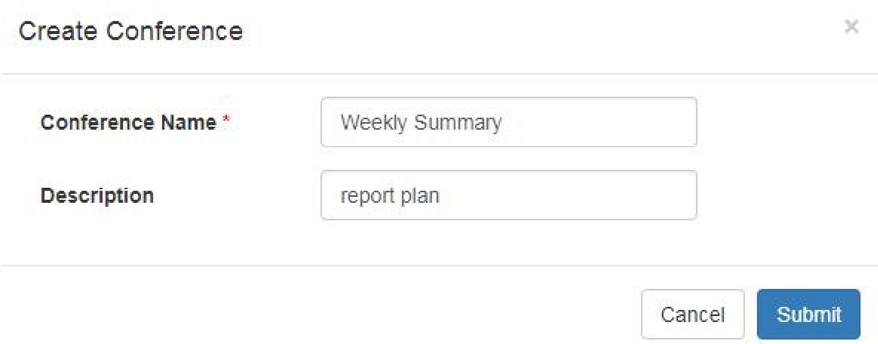


In the above example, you cansee the agent name, agent ID and extension.

Conference

Conference feature is only available for supervisor agent. By creating a conference and adding desired agents into this conference you'll be able to start a teleconference with the selected agents.

Click on + Create Conference to create a new conference if required.



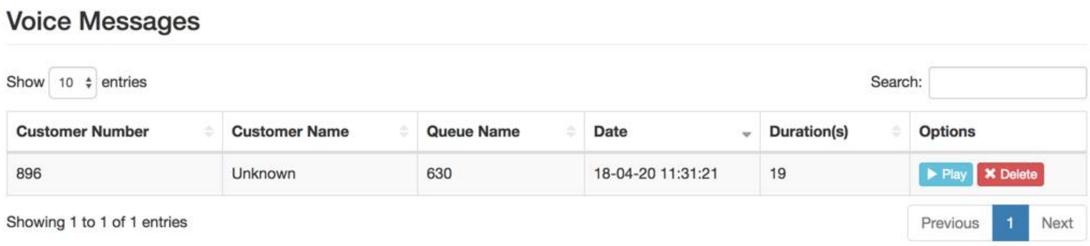
When a conference is successfully created, it will show on the "Conference" page like below.

In the "Agent Name" field, you need to select those agents who you want to invite to this conference. After agents have been selected, by clicking on Start button, you extension and the extensions of the selected agents' will ring, after agents answering this call, the conference will then begin.

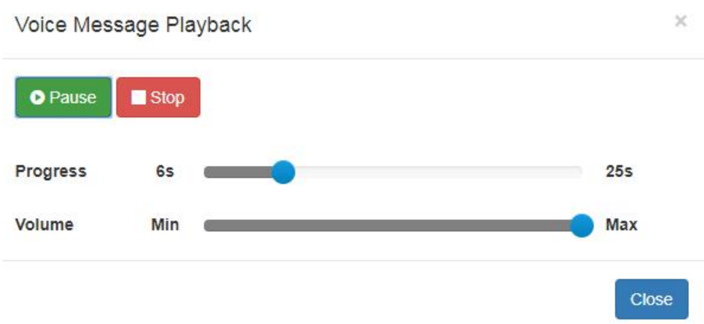
Voice Message

When there's no agent in the queue or the caller has been waiting in the queue for too long, the call will be directed to voicemail, the caller will then leave a message following the voice prompts.

On this page, it shows all the voice messages from customers. You can check the voice messages of each queue managed by the supervisor agent.



You may playback the voice messages on the web page directly by clicking on the Play button.

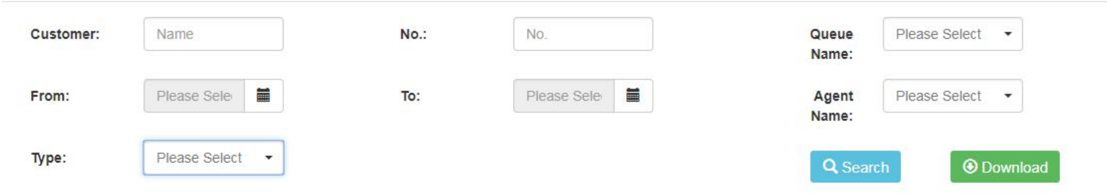


Or you may delete the messages by clicking on the Delete button.Please ensure that you have reviewed the messages before deleting them, once the messages been deleted you'll not able to recover them.

Recording List

Call recording is not enabled by default, only those agents whose extensions have been enabled with call recording feature by the system admin, then their phone calls will be recorded.

On the recording list page, you'll be able to check recordings of all agents with call recording feature enabled.



- 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.
- Queue Name:Select a queue name in the dropdown list to search recordings on this queue only. The "DOUT" option means search outbound call recordings only.
- In the "From"field, choose the start time and in the "To" field set the end time to search recordings in this time period.
- Agent Name:Select an agent in the dropdown list to search call recordings of this agent only.
- In the "Type"fieldselect the call type. Include Inbound, Auto Dialed or Manual Dialed.

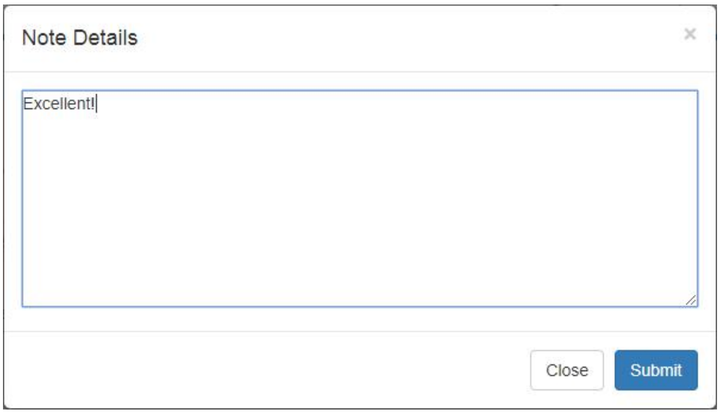
Show 10 entries

	Customer Name	Customer Number	Agent Name	Queue Name	Type	Record Duration(s)	Date	Comment	Options
	yu.ding	810	Vela	630	Inbound	31	2018-04-11 10:18:48	2018-04-18 16:16:09	Play Download Comment
	yu.ding	810	Vela	630	Inbound	1141	2018-04-13 15:02:43	2018-04-17 10:53:49	Play Download Comment
	yu.ding	810	Vela	630	Inbound	330	2018-04-11 10:19:37		Play Download Comment
	yu.ding	810	Yoky	630	Inbound	173	2018-04-13 13:53:31		Play Download Comment
	yu.ding	810	Vela	630	Inbound	7	2018-04-13 15:22:47		Play Download Comment
	yu.ding	810	Vela	630	Inbound	15	2018-04-13 15:23:10		Play Download Comment
	yu.ding	810	Vela	630	Inbound	12	2018-04-13 15:23:49		Play Download Comment

You may click on the ▶ Play button to play the recording on the web page.

If you want to save this recording to your desktop, you should click on the Download button to download it. Or if you want to perform bulk download, then please click on the download button next to the "Search" button.

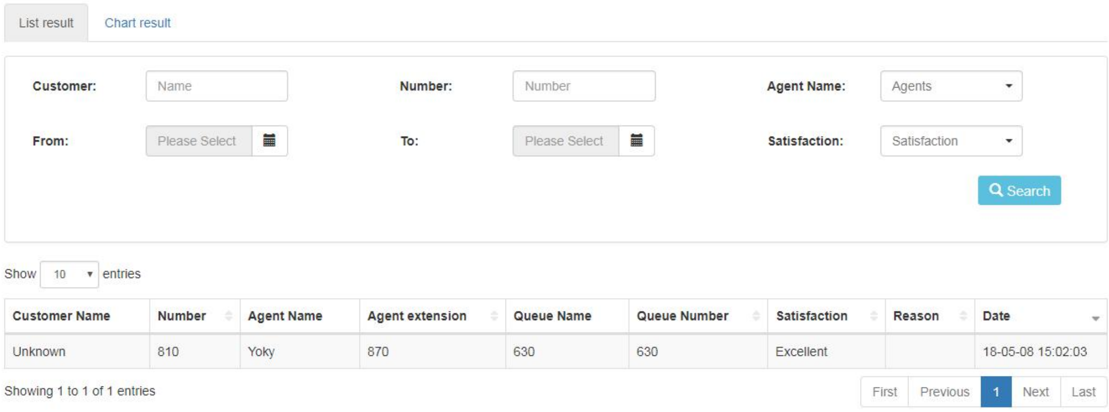
If you need to comment on a recording, please click on the Comment button.



Your comments of the recording will be visible to the administrator, other supervisor users and the agent this recording belongs to.

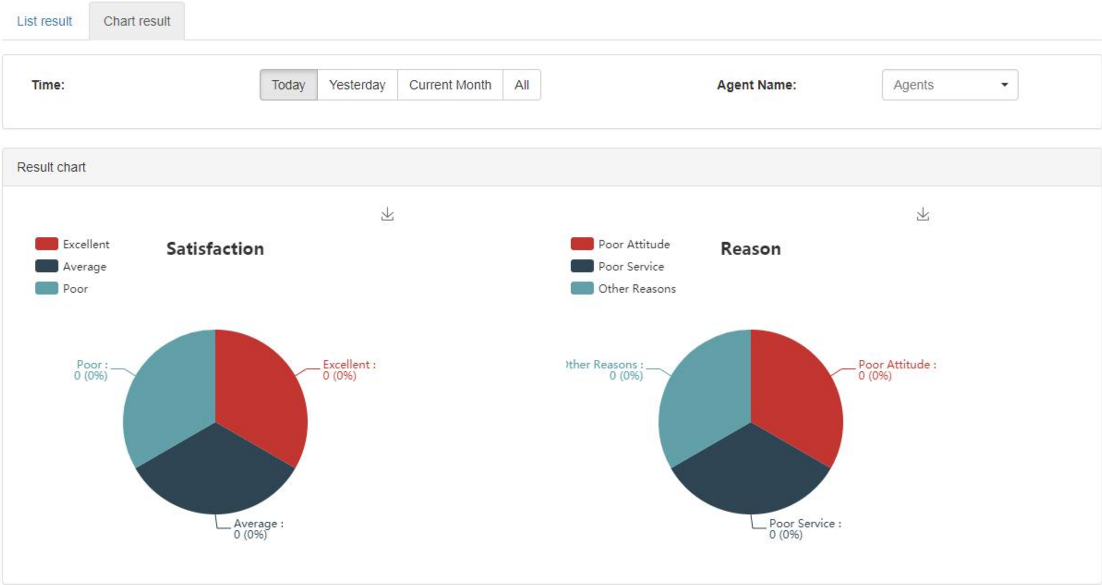
Customer Feedback

Customer feedback is used to inspect the service quality of the call queue agents. It is a feature which can be enabled by the administrator. When enabled, after each call the agent need to disconnect the call first, and then the customer will hear system prompts of rating the calls. If the customer followed the voice prompts and rated the call, supervisor user and administrator will be able to see the results.



The voice prompts the customer will hear is "Please rate this call, excellent please press one, average please press two, poor please press three", the customer now should press a key to submit his/her evaluation. If customer is satisfied with the service then the call will be disconnected, if the customer is not satisfied with the service, another voice prompts will be played "Please let us know the reason of your dissatisfaction, poor attitude please press one, poor service please press two, other reasons please press three", the customer chooses one of the reasons of his/her dissatisfaction, then the call will be disconnected.

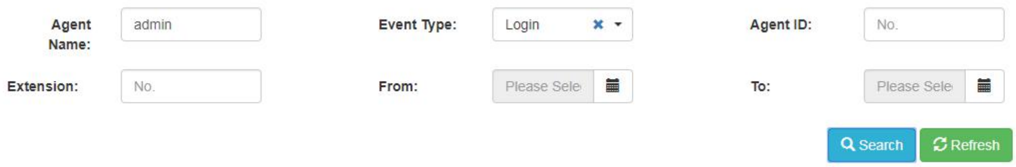
Except the detailed list of customer satisfaction results, you can also check the overall satisfaction results in chart view.



By selecting an agent in the "Agent Name"dropdown list, you may check the overall customer satisfaction of one agent.

Operation Log

On Operation Log page you may check all the logs of the web access records. Include admin user, supervisor user and agent users.



- If you want to search according to theagent name, you should specify the agent name in the "Agent Name" field.
- If you want to search according to theevent type, you should select one type from the"Event Type"dropdown list, such as login.
- If you want to search according to the agent ID, you should specify the agent ID in the "Agent ID" field.
- If you want to search according to extension number, you should input extension number in the "Number" field.
- In the "From"field, choose the start time and in the "To" field set the end time to search events in this time period.
- Click on Refresh to get the newest data.

The search results are as below.

Show 10 entries

Agent Name	Agent ID	Extension	Event Type	Event Details	Date
Admin	Admin	Admin	Login	Admin Login	18-04-10 16:40:57
Admin	Admin	Admin	Login	Admin Login	18-04-10 16:39:00
Admin	Admin	Admin	Login	Admin Login	18-04-10 16:36:44
Admin	Admin	Admin	Login	Admin Login	18-04-10 16:36:13
Admin	Admin	Admin	Login	Admin Login	18-04-10 16:21:28
Admin	Admin	Admin	Login	Admin Login	18-04-10 16:16:10

Showing 1 to 6 of 6 entries

First Previous 1 Next Last

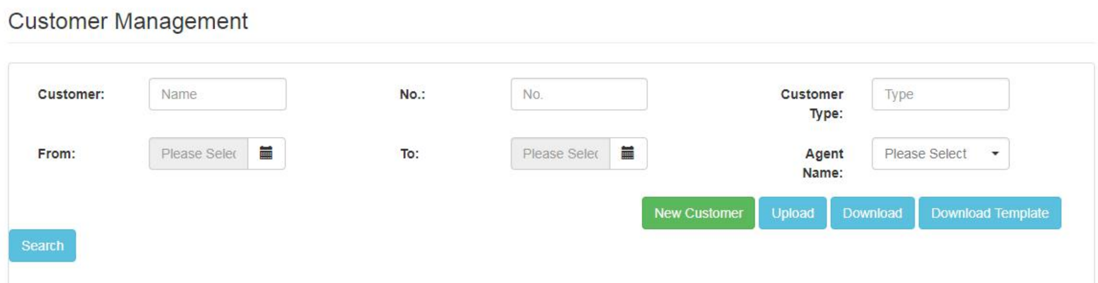
The time of when the login action took place, by which agent, the extension and the actions taken will all be listed.

CRM

Customer Management

Supervisor agent can manage all contacts created by the ordinary agents and can create new contacts and assign them to different agents. Once a contact has been created and assigned to an agent, this contact will only be visible to the unique agent. And the inbound calls of this contact will be preferentially distributed to that agent extension.

You may search existing contacts using the search criteria as below.



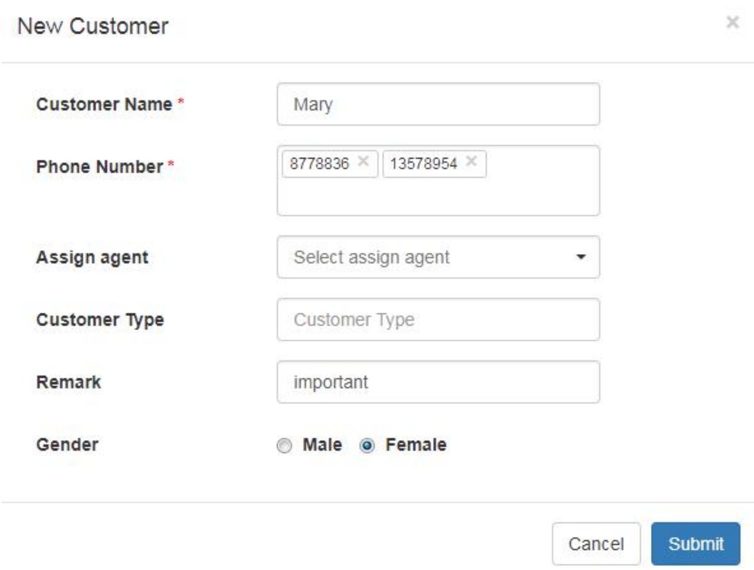
If you want to download the contact list, please click on Download button, you'll get a MS xlsx file which contains all the contacts.

Or if you want to bulk add contacts, please click on Download Template button, and the templatefile will be downloaded. Edit the xlsx file with Microsoft Office Excel and add contacts in the given format, and then upload to generate the contact list.

Notice:

The contacts added in the template file should not exceed 10000.

There are two other ways ofadding new contacts. One way is that edit the info of caller on the calls pop-up window. The other way is on the Customer Management page, by clicking on the New Customer button to create a new customer. Adding a new contact from the inbound call pop up window has been introduced previously. Below is the example of adding new contacts from the “Customer Management” page.



If the customer has several phone numbers, in the “Phone Number” field, you may add multiple numbers. In the “Assign Agent” dropdown list, select an agent for this contact, so the selected agent will be able to see this contact in his/her CRM page, and the inbound calls will be distributed to this agent in higher priority.

The customers added by you will be listed as below.

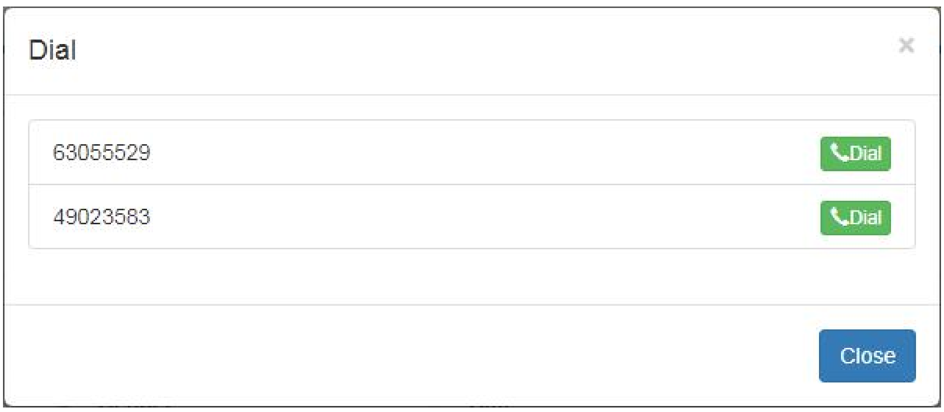

Show 10 entries

Name	Gender	Assign agent	Edit by agent	Remark	Date	Options
Mary	Female	Unknown	871	1335	18-04-11 10:02:34	Edit Dial Delete
Tony	Male	Unknown	871		18-04-11 09:27:09	Edit Dial Delete

Showing 1 to 2 of 2 entries

First Previous 1 Next Last

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



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

While editing a contact, except the basic info, there are some other info could be implemented as properties of a contact. The properties in the “Other Info” section are manual added by the administrator.

In the above example, the property “Email” is manually added by administrator from the “Custom Table” page. If there are some extra properties required to be specified to the contacts, you may contact the system administrator.

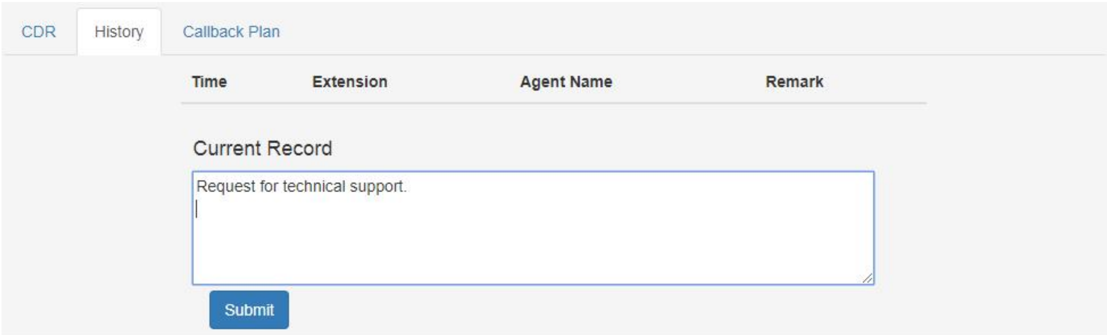
After a custom property has been added, you’ll also be able to see it in the customer list.

Show 10 entries

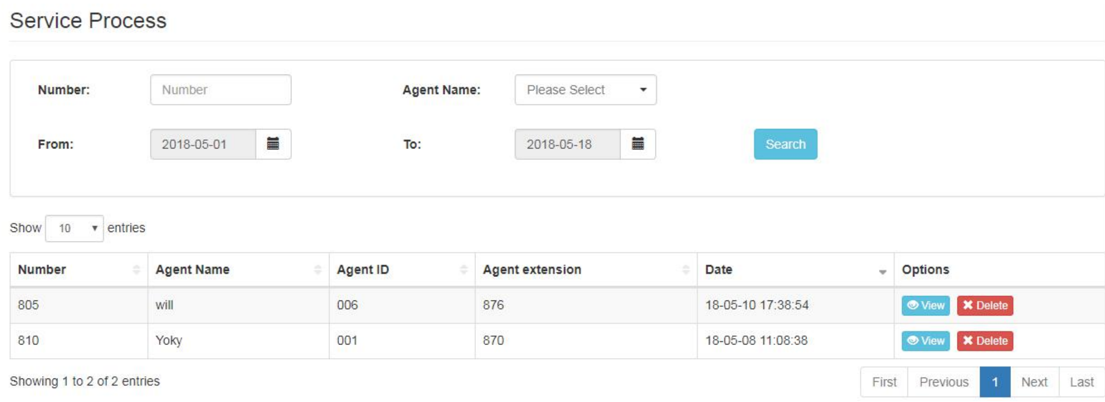
Name	Gender	Email	Assign agent	Edit agent	Remark	Date	Options
John Doe	Male	johndoe@gmail.com	john	will	New Customer	18-05-10 17:07:40	Edit Dial Delete
3333	Female		john	john	333	18-05-09 17:18:42	Edit Dial Delete
Jane	Female		john	will	new customer	18-05-09 15:10:43	Edit Dial Delete

Service Process

Service progress shows the notes taken by the agent during answering the customers' phone calls.



The notes could be reviewed by supervisor agent user from the "Service Process" page.



By clicking on the  button the content will display on the pop up window.

This feature guarantees the emphasis of a customer call will not be missed and forgotten.

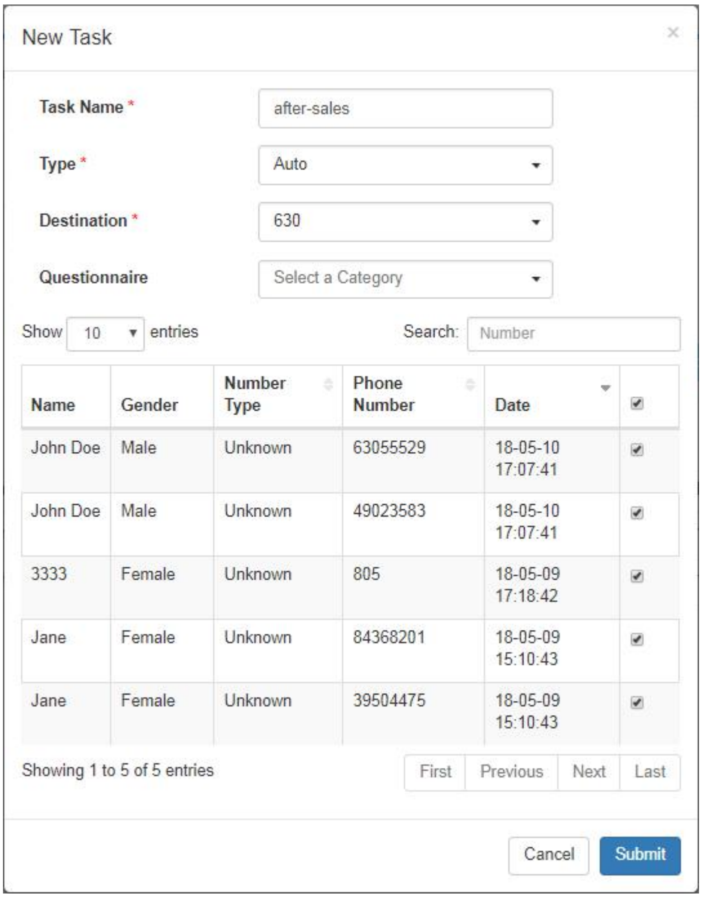
Outbound Dial

Outbound Dial Task

Outbound Dial Tasks are phone callschedules made by supervisor user for call queue agents to dail certain customer numbers in specified time durations. Could be used for telemarkting, after-sales follow-up, telephone survey,etc.

There are 2 types of outbound dial tasks: Manual-dial Outbound Task and Auto-dial Outbound Task.

Add Auto-dial Tasks



New Task

Task Name * after-sales

Type * Auto

Destination * 630

Questionnaire Select a Category

Show 10 entries Search: Number

Name	Gender	Number Type	Phone Number	Date	
John Doe	Male	Unknown	63055529	18-05-10 17:07:41	
John Doe	Male	Unknown	49023583	18-05-10 17:07:41	
3333	Female	Unknown	805	18-05-09 17:18:42	
Jane	Female	Unknown	84368201	18-05-09 15:10:43	
Jane	Female	Unknown	39504475	18-05-09 15:10:43	

Showing 1 to 5 of 5 entries First Previous Next Last

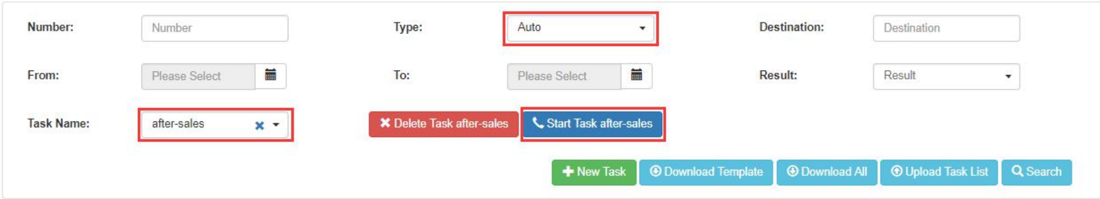
Cancel Submit

- In the "Type" dropdown list, you should select "Auto".
- In "Destination" dropdown list, you could select a call queue or an IVR menu for the auto dialed outbound calls.
- In the "Questionnaire" dropdown list, select a questionnaire if required.
- Last step would be selecting the customers to be called.

After an auto-dial task is created, in the search field, in "Type" dropdown list select

"Auto", then you'll see the auto-dial tasks you have created.

If you want to start the auto-dial task now, in the "Task Name" dropdown list you should select the task you want to start and click on "Start Task xxxx" button.



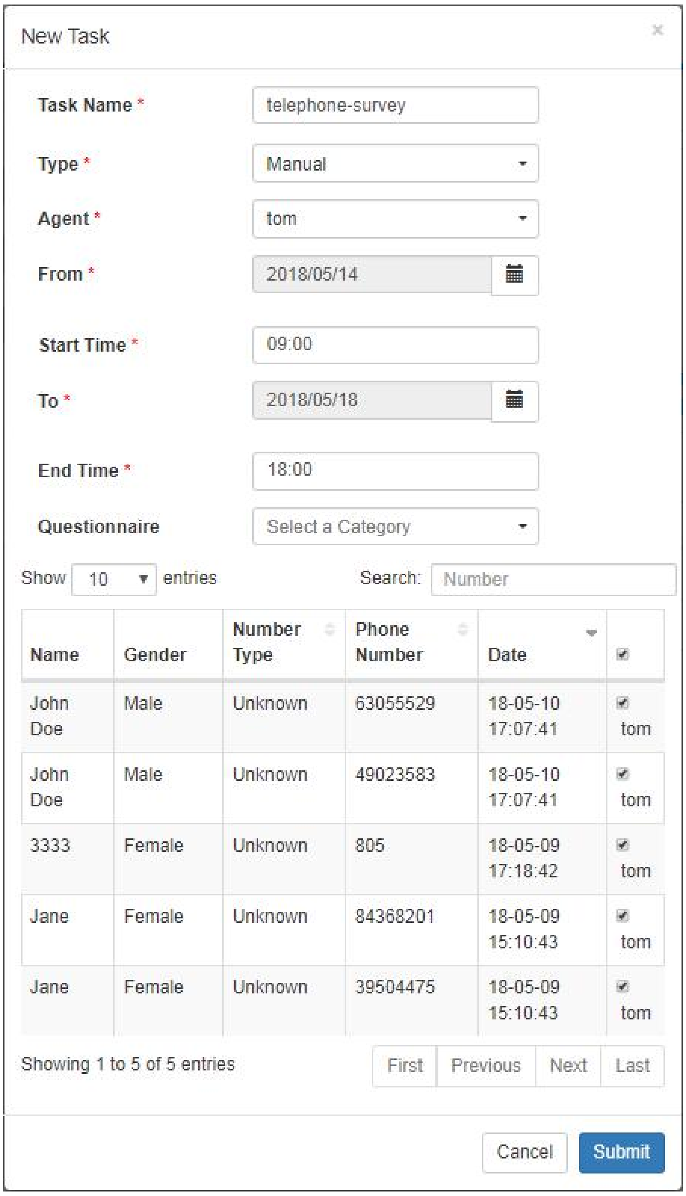
Once the auto-dial outbound task started, system will start dialing those customer numbers according to the idle agents of the selected queue and the available trunk lines you have in the system.

When the customers have answered the calls, their calls will be answered by the queue agents or they will be presented with the IVR prompts based on your configurations of the auto-dial outbound task.

During the auto-dial outbound task process, if you want to stop the task, please click on the "Stop the task xxxx"button as shown below.

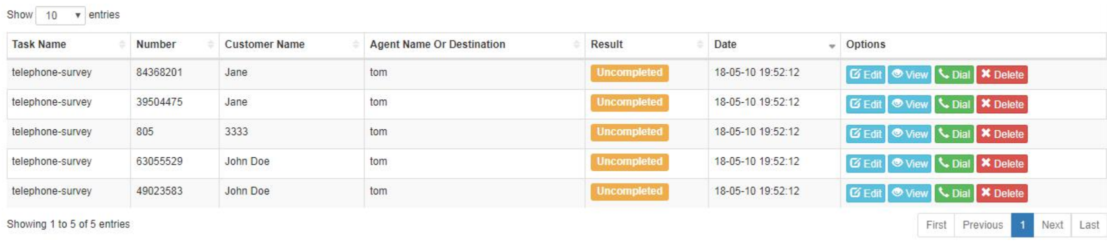
At this moment, system will stop making any new calls, the calls in progress will keep going on. The dialed numbers will be marked as completed, the pending numbers will still be marked as "Uncompleted". When you want to start the task again, system will continue with the rest numbers.

Add Manual-dial Tasks



- In the "Type" dropdown list, you should select "Auto".
- In "Agent" dropdown list, you should select a call queue agent to assign this manual outbound dial task to.
- By using "From" and "To" date selector and "Start Time" and "End Time" time selector to set a time duration for the agent to complete this task.
- In the "Questionnaire" dropdown list, select a questionnaire if required.
- Last step would be selecting the customers to be called.

After an manual-dial task is created, in the search field, in "Type" dropdown list select "Manual", then you'll see the manual-dial tasks you have created.



Show 10 entries

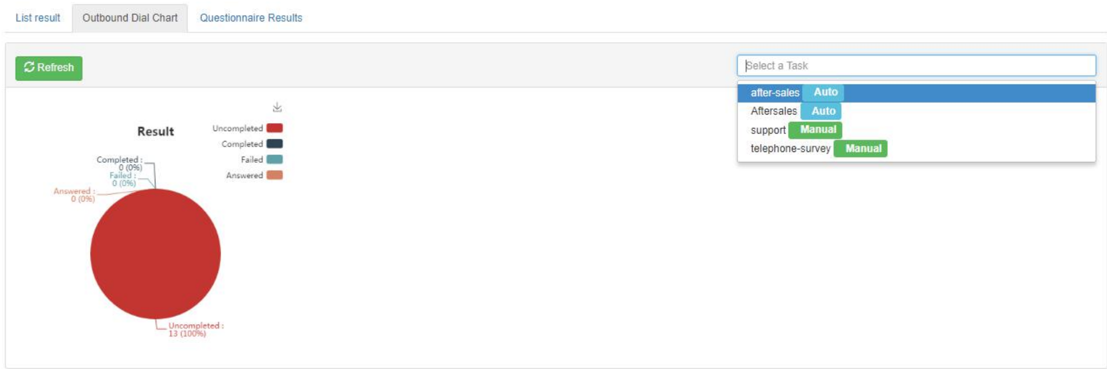
Task Name	Number	Customer Name	Agent Name Or Destination	Result	Date	Options
telephone-survey	84368201	Jane	tom	Uncompleted	18-05-10 19:52:12	Edit View Dial Delete
telephone-survey	39504475	Jane	tom	Uncompleted	18-05-10 19:52:12	Edit View Dial Delete
telephone-survey	805	3333	tom	Uncompleted	18-05-10 19:52:12	Edit View Dial Delete
telephone-survey	63055529	John Doe	tom	Uncompleted	18-05-10 19:52:12	Edit View Dial Delete
telephone-survey	49023583	John Doe	tom	Uncompleted	18-05-10 19:52:12	Edit View Dial Delete

Showing 1 to 5 of 5 entries

First Previous 1 Next Last

You might have created several different manual-dial outbound tasks, by selecting one of the tasks in the "Task Name" dropdown list, you'll see list of calls in this task.

Outbound Dial Chart

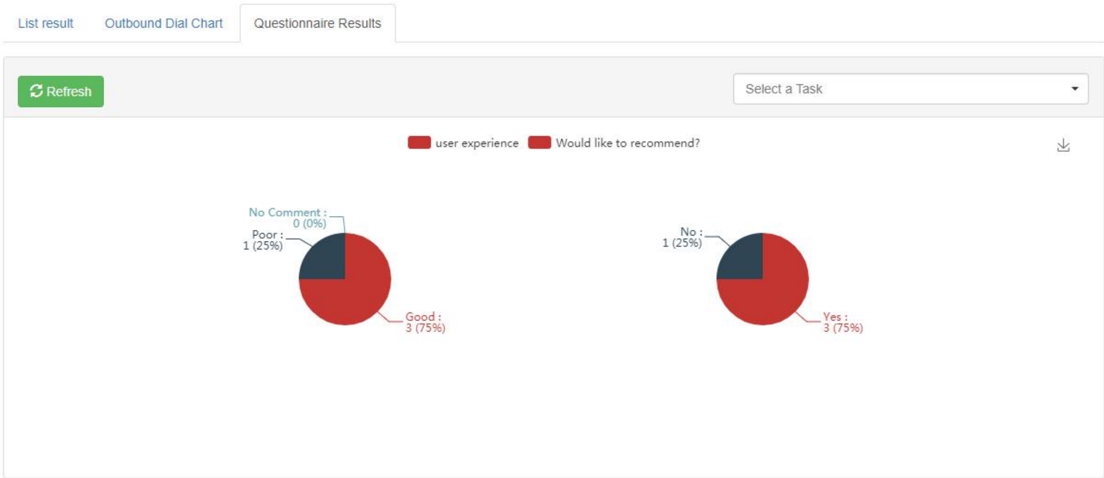


The outbound dial chart provides a chart view of the percentages and ratio of completed, uncompleted, Failed and Answered phone calls.

- "Uncompleted" stands for those calls which haven't been dialed yet.
- "Completed" stands for those calls which already have been dialed.
- "Failed" stands for those calls which dialed but the called party didn't answer.
- "Answered" stands for those calls which have been dialed and answered by the called party.

On the top right corner you may select a task in the "Select a Task" dropdown list to see the results of a single task. Otherwise the chart you see is an overall result.

Questionnaire Results



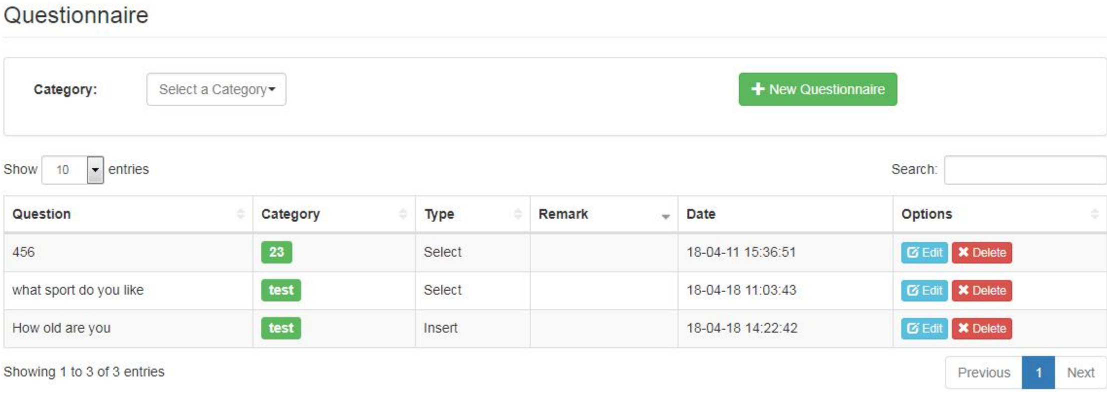
Questionnaire results are the chart view of the feedbacks'statistics of the questionnaires associated with those outbound dial tasks.

Questionnaire

On questionnaire page, it lists all the questionnaires in the CallCenter system. This feature can be set up only in the supervisor Web GUI. Agent users and admin users aren’t allowed to have thisfunction.

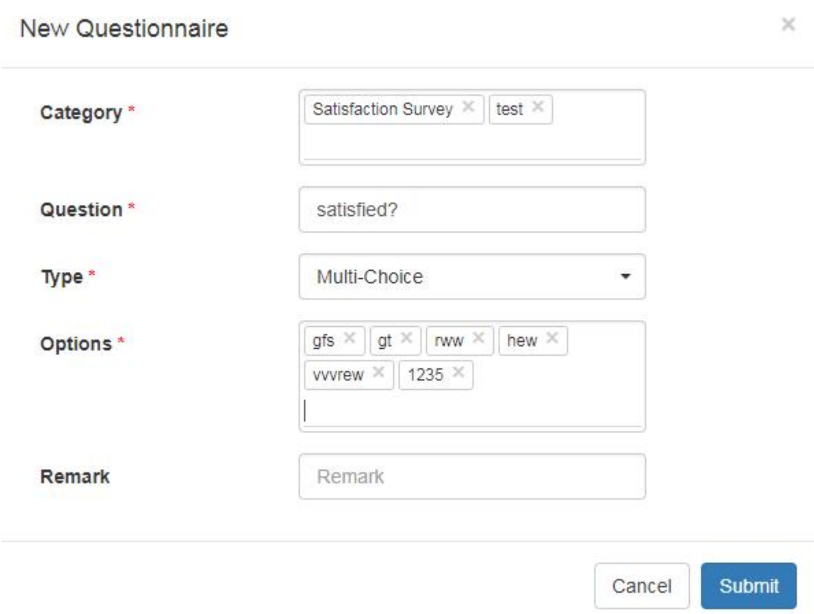
Navigate to web menu Outbound Dial->Questionnaire.

Choose the category from the dropdown list titled “test”, and the results are shown on the table, including question, category, type, remark and date.



If you need to add new questionnaire, please click on 

, and then you will enter in the following picture.



- Category:specify the questionnaire category by inputting or choosing category name.

- Question:customized your question.
- Type:Insert, Select, Single Choice and Multi-Choice are four options the system given. Choose one to set up your question, such as Multi-Choice.
- Options:this field is non-existence if you choose the type "Insert". Please input some options for your question if you choose other types.
- Remark:specify some other information if necessary.

The question you add is on below.


Show 10 entries Search:

Question	Category	Type	Remark	Date	Options
satisfied?	Satisfaction Survey test	Multi-Choice		18-04-11 14:50:26	Edit Delete
12	test	Select		18-04-11 15:27:40	Edit Delete

Showing 1 to 2 of 2 entries Previous 1 Next

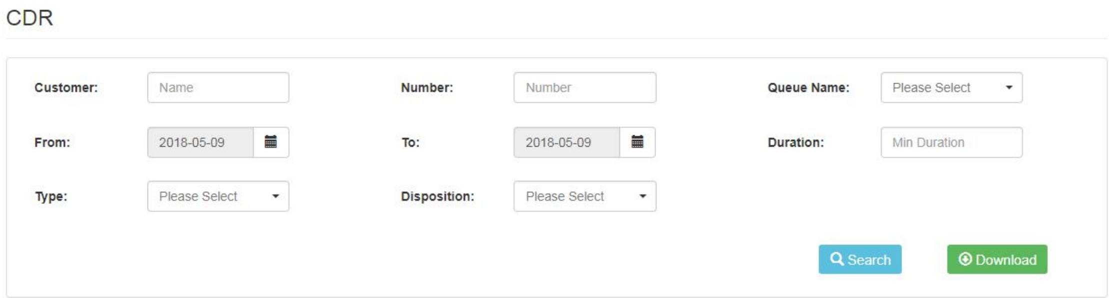
: edit button provides to you change the information.

: delete button can be used to delete one question.

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 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.
- Agent: Search call logs of a specific agent.

A typical call log search results as below.

Show 10 entries

Customer Name	Number	Agents	Queues	Type	Disposition	Duration(S)	Start Time	Options
	******	john[005]	631[631]	Inbound	Answered	46	18-05-09 11:16:05	Dial
	******	john[005]	631[631]	Inbound	Answered	41	18-05-09 11:13:47	Dial
	******	john[005]	631[631]	Inbound	Answered	30	18-05-09 11:10:19	Dial

Showing 1 to 3 of 3 entries

First Previous 1 Next Last

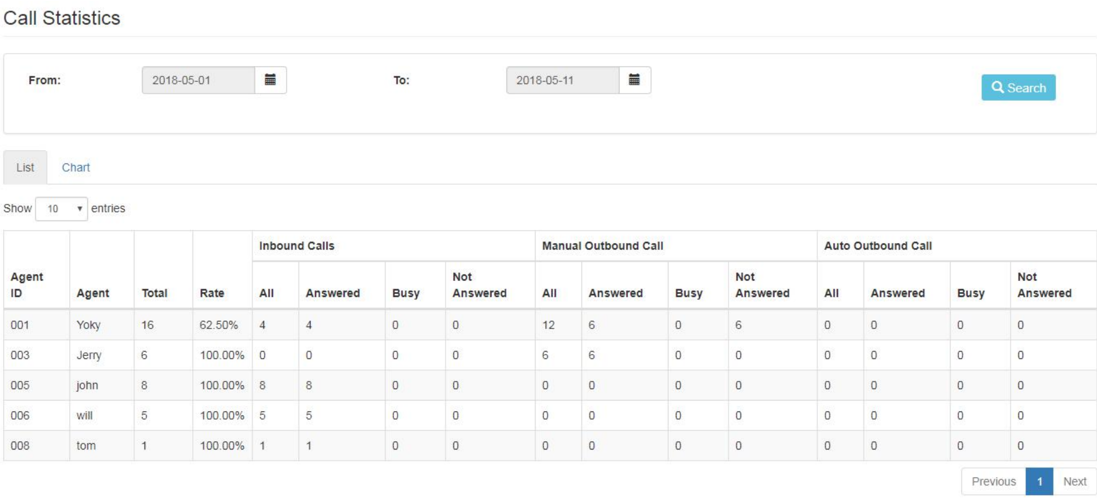
If you want to check the recording of a call, you need to do it on the "Recording List" page.

Notice:

- The ordinary agents might see numbers like "*********" or "59****40" in their call logs or on the incoming call screen, this is because of the system admin set the system to hide those numbers/digits.
- When the call typeis "Manual Dialed"and the "Disposition"is "Unanswered" or "Busy", the duration refers to the ringing time.

Call Statistics

There are 2 different views of the total call statistics: list view and chart view. In list view, by specifying a time duration you'll get a detailed list of call statistics of all agents like shown below.


Call Statistics

From: 2018-05-01 To: 2018-05-11 Search

List Chart

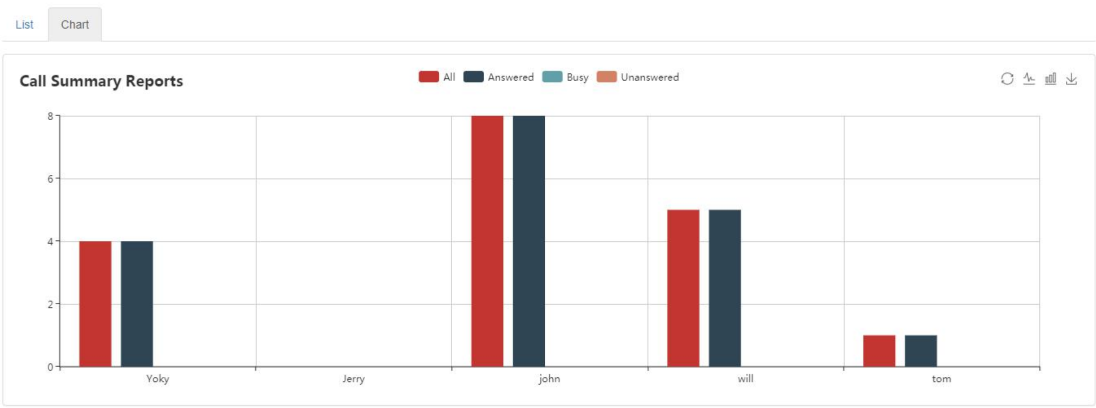
Show 10 entries

Agent ID	Agent	Total	Rate	Inbound Calls				Manual Outbound Call				Auto Outbound Call			
				All	Answered	Busy	Not Answered	All	Answered	Busy	Not Answered	All	Answered	Busy	Not Answered
001	Yoky	16	62.50%	4	4	0	0	12	6	0	6	0	0	0	0
003	Jerry	6	100.00%	0	0	0	0	6	6	0	0	0	0	0	0
005	john	8	100.00%	8	8	0	0	0	0	0	0	0	0	0	0
006	will	5	100.00%	5	5	0	0	0	0	0	0	0	0	0	0
008	tom	1	100.00%	1	1	0	0	0	0	0	0	0	0	0	0

Previous 1 Next

In the list view, you got"Total" calls, "Inbound Call", "Manual Outbound Call" and "Auto Outbound Call" statistics of each of the call queue agents.

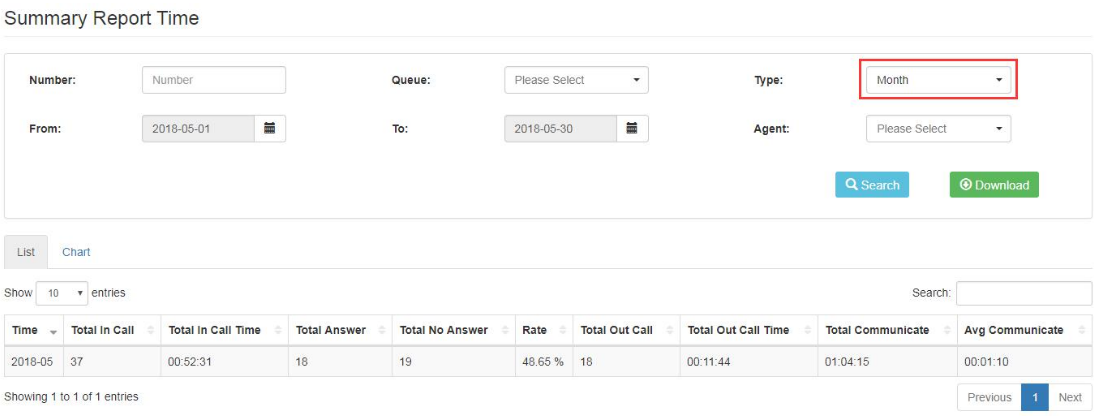
If you want to check the chart view, please click on "Chart"tab menu.



Summary Report Time

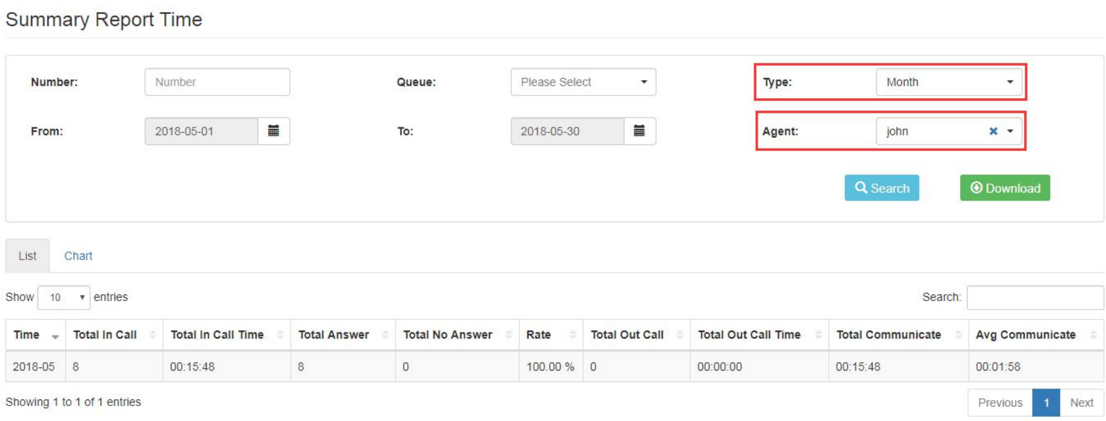
Supervisor agent can have a summary report of the overall call count and in call time of the call center system or of a call queue agent.

The in call time could be viewed in Hour, Day, Month and Year basis.



In the above example, you got the summary report of overall in call time of the call center system in May.

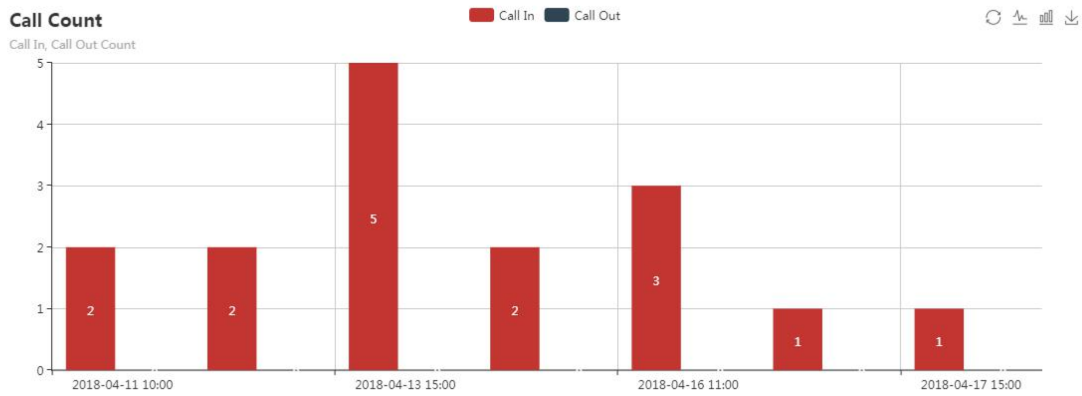
Another example.



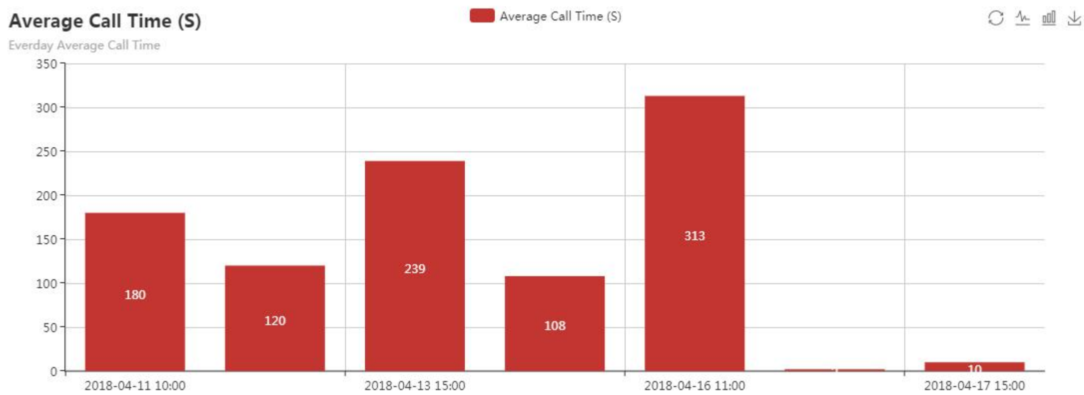
In the above example, you got the summary report of overall in call time of the call queue agent "john".

The summary report of the overall call count and in call time of the call center system or of a call queue agent can also be viewed in chart view.

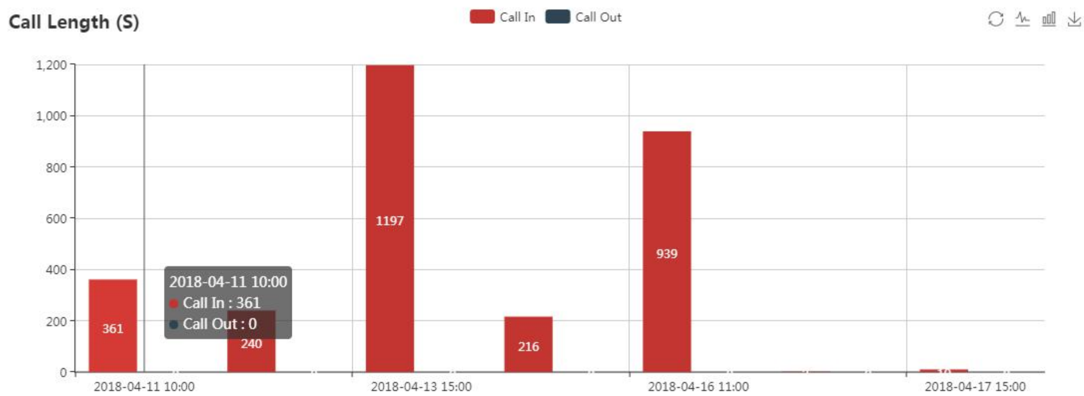
Call Count:



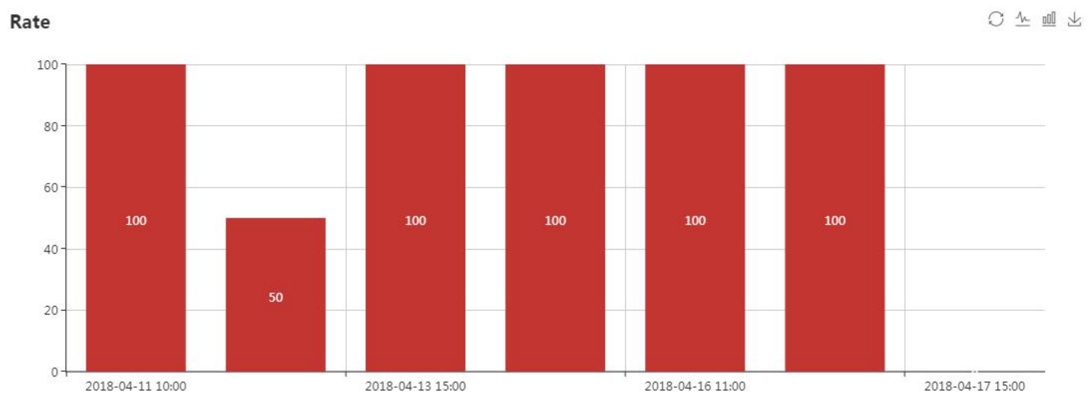
Average Call Time(s):



Call Length(s):



Rate:



If you want to quote these diagrams in your power point slides or any other reports, you may click on the button on the top right corner to save the diagram as a PNG file to your desktop.