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Call Center Agent Guide

NORTEL NETWORKS™

Call Center Agent Guide

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Call Center Agent Guide

This guide explains how agents use Call Center. The topics covered in this guide are:

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About Call Center

Call Center is an application that handles incoming calls as efficiently and economically as possible. Call Center answers calls, then routes the calls to agents in a skillset that most closely meets the needs of the caller. If there are no agents available, the calls are placed in a skillset to wait for an appropriate agent. Waiting callers receive periodic announcements and informative messages.

Other guides

For information about	**Refer to**
using your telephone	your telephone user card
using CallPilot	• the *CallPilot Reference Guide* • the *CallPilot Quick Reference Card* for your telephone interface
Call Center supervisors	the *Call Center Supervisor Guide*
Multimedia Call Center	Multimedia Call Center online Help

Logging on to Call Center

Log on to Call Center so that calls can be routed to you.You cannot log on if the maximum number of agents is logged on, if you are logged on to another telephone, or if someone else is logged on to your telephone. You can log on only to skillsets that you are assigned to.

Logging on from a two line display telephone

1 Press [↻] [9] [0] [4].

2 Enter your Agent ID and press OK or [#].
Your Call Center Administrator can tell you your Agent ID.

3 Enter your password and press OK or [#].
The first time you log on, or when you log on after your password has been reset, enter the default password, 0000. If you enter the default password, you must create a new password.

4 Press IN to log on to one or all skillsets. If IN does not appear, you are already logged on to all the skillsets, or there are no skillsets available.

5 Press CHNG until the skillset that you want to log on to appears on the display. If you log on to all of the skillsets, you are logged on to all the skillsets that you are assigned to. If there is only one skillset available to log on to, you are automatically logged on to that skillset.

6 Press OK or [#]. You are logged on to the skillset number displayed, or all of the skillsets if ALL is displayed.

Logging on from a one line display telephone

When you log on from a one line display telephone you also log on to all skillsets to you are assigned to.

1 Press [↻] [9] [0] [4].

2 Enter your Agent ID and press [#].
Your Call Center Administrator can tell you your Agent ID.

3 Enter your password and press [#].
The first time you log on, or when you log on after your password has been reset, enter the default password, 0000. If you enter the default password, you must create a new password.

4 Your agent name and Logged into all appears on the display to show that you are logged on to all of the skillsets you are assigned to. If Logged out all appears, repeat steps 1 through 3 to log on.

Logging on to Multimedia Call Center

To log on to Multimedia Call Center if you are taking only voice calls, log on to the telephone the same way you do as a Call Center agent.

To start Multimedia Call Center on your computer:

1 Click the **Start** button, point to **Programs**, point to **Nortel Networks**, point to **Internet Voice Button** and click **Agent Notification**. The Agent Notification page appears.
For information about using Multimedia Call Center, click Help.

Logging off Call Center

When you are finished for the day or will be away from your telephone for an extended period, log off to stop calls from being routed to your telephone.

Logging off from a two line display telephone

1. Press [Feature] [9] [0] [4].
2. Enter your Agent ID and press OK or [#].
3. Enter your password and press OK or [#].
4. Press OUT. If OUT does not appear, you are not logged on to any skillsets.
5. Press CHNG until the skillset you want to log off from appears on the display. If you are logged on to only one skillset, that skillset is automatically selected.
6. Press OK.
7. You are logged off from the skillset number displayed, or from all skillsets if ALL is displayed.

Logging off from one line display telephone

When you log off from a one line display telephone you are also automatically logged off from all the skillsets you are logged on to.

1. Press [Feature] [9] [0] [4].
2. Enter your Agent ID number and press [#].
3. Enter your password and press [#].
4. Press [1]. Logged out appears on the display to show you are logged off from all skillsets.

Changing your agent password

Your Agent ID and password give you access to the skillsets you are assigned to. Keep your password confidential. Change your password on a regular basis, approximately every 30 days.

Changing your password from a two line display telephone

1. Press [Feature] [9] [0] [4].
2. Enter your Agent ID and press OK or [#].
   Your Call Center Administrator can tell you your Agent ID.
3. Enter your password and press OK or [#].
4. Press IN to log on.
5. Press NEXT.
6. Press Admin.
7. Enter a new password that is from four to eight digits long and press OK or [#].
8. Re-enter your new password and press OK or [#]. Password changed is briefly displayed.
9. Press [Release].

Changing your password from a one line display telephone

1. Press [Feature] [9] [0] [4].
2. Enter your Agent ID and press [#].
   Your Call Center Administrator can tell you your Agent ID.
3. Enter your password and press [#].
   Your log on status changes from Logged on to Logged off or Logged off to Logged on.
4. Press [4] within the next five seconds.
5. Enter your new password and press [#].
6. Re-enter your new password and press [#]. Password changed is briefly displayed.
7. Your original log on status appears.

Using Feature Codes

You use Feature Codes to access Call Center features. The default Feature Codes are shown below. Your Call Center Administrator can program Custom Feature Codes that you use instead. If you use Custom Feature Codes, you can record them in the space provided below.

Feature	Default Feature Code	Custom Feature Code
Open mailbox	✆ 9 8 1	✆ 9 ___ ___
Log on/Log off	✆ 9 0 4	✆ 9 ___ ___
Not Ready	✆ 9 0 8	✆ 9 ___ ___
Display Waiting Calls	✆ 9 0 9	✆ 9 ___ ___

You can program these Call Center Feature Codes to memory buttons:

- Log on ✆ 9 0 4
- Display Waiting Calls ✆ 9 0 9
- Not Ready ✆ 9 0 8

For how to program a Feature Code to a memory button refer to “Programming a memory button” on page 10.

If you enter a CallPilot Feature Code (not a Call Center Feature Code) while you are logged on, the date and time display appears after the feature times out or you exit the feature. You can enter ✆ 9 0 4 (Log on) to return to the last ✆ 9 0 4 display.

If you enter a Call Center Feature Code such as ✆ 9 0 8 while you are logged on to ✆ 9 0 4, the last ✆ 9 0 4 display returns before you exit.

Log on ✆ 9 0 4

Use Log on to log on to Call Center and the skillsets you are assigned to.You can program a memory button with the Log on Feature Code. If the memory button you choose has an indicator, the indicator shows your log on status.

- If the indicator is off, you are not logged on.
- If the indicator is on, you are logged on.

For information about how to program a memory button, refer to “Programming a memory button” on page 10.

Display Waiting Calls [feature] 9 0 9

Use Display Waiting Calls to view information about skillsets and the calls waiting in skillsets. The table below describes the information in each display.

Display	Description
Skill 1: Enabled	shows the skillset number and the status of the skillset. The status can be Enabled, Disabled or Uninit (uninitialized).
1: 6 agents	shows the skillset number and how many agents are currently logged on to the skillset
1: 10 calls	shows the skillset number and the number of calls in the skillset
1: wait 9:45	shows the skillset number and the time of the call waiting longest in the skillset.

Using Display Waiting Calls from a two line display telephone

1. Press [feature] 9 0 9.
   The skillset display for skillset 1 appears.
2. Press SKILL to view information about the next skillset. Press NEXT to view the next Display Waiting Calls display.
3. Press [release] to exit.

Using Display Waiting Calls from a one line display telephone

1. Press [feature] 9 0 9.
   The display changes to the next display every five seconds. After the four displays appear for each skillset, the Display Waiting Calls feature exits.
2. Press [release] to exit.

Using Display Waiting Calls with a memory button

Program a memory button with [feature] 9 0 9 to view the status of all skillsets, including the skillsets that you are logged on to. If the memory button you choose has an indicator, the indicator shows information for the calls for the skillset that you are logged on to.

- If the indicator is off, all of the calls are within the acceptable wait time.
- If the indicator is flashing slowly, at least one call has exceeded the first alert time.
- If the indicator is flashing quickly, at least one call in the skillset has exceeded the second alert time. The Call Center Administrator sets what the wait times are.

For information about how to program a memory button, refer to “Programming a memory button” on page 10.

Not Ready [✆] 9 0 8

If you use Not Ready, you do not receive calls.Your Call Center Administrator can also program a Break Time, which makes Call Center automatically wait a short time before it routes the next call to you. You can use the Break Time to complete any paperwork required by the last call. If you need some extra time, use Not Ready to prevent Call Center from routing another call to you. Do not use the Do Not Disturb feature. You can use Not Ready while a call is ringing on your telephone. The call that is ringing on your telephone goes back to the skillset. You can program a the memory button with an indicator instead of pressing [✆] 9 0 8. For how to program a memory button, refer to "Programming a memory button" on page 10.

Using Not Ready

1 Press [✆] 9 0 8. `Make not ready` appears on the display.
If you press [✆] 9 0 8 and `Wrap canceled` appears on the display, you cancelled the Break Time that the Call Center Administrator programmed for you.You must press [✆] 9 0 8 again to activate the Not Ready feature.
If you press [✆] 9 0 8 and `Agent active` appears, the Not Ready feature was on and you canceled it. Press [✆] 9 0 8 again to activate Not Ready.

2 Cancel the Not Ready feature by pressing [✆] 9 0 8 when you are ready to take calls again.
If `Busy enabled` appears, press [✆] 9 0 8 again.
Not Ready is automatically enabled if you do not answer your telephone.

Programming Not Ready to a memory button

You can have convenient, one button access to Not Ready if you program a memory button with the Not Ready Feature Code. If the memory button you choose has an indicator, the indicator shows your busy status.

- If the indicator is off, Not Ready is off.
- If the indicator is on, Not Ready is on.
- If the indicator is flashing, the Break Time feature is on.

For how to program a memory button, refer to "Programming a memory button" on page 10.

Programming a memory button

You can program memory buttons for one-touch access to Call Center features. You can program memory buttons for the Log on [✆] [9] [0] [4], Not Ready [✆] [9] [0] [8] and Display Waiting Calls [✆] [9] [0] [9] features. You cannot assign features to Line, Intercom, Answer or Handsfree/Mute buttons.

Programming a feature to a memory button

1. Press [✆] [*] [3].
2. Press the memory button that you want to program.
3. Press [✆] and enter the feature code.

Use the paper labels that come with your telephone to identify the programmed button. To use the Feature Code, press the labeled button.

Memory button indicators

Memory button indicators are triangular icons (▶) that appear beside some memory buttons. If you program Call Center features on memory buttons with indicators, the indicators show additional information about the feature.

Other Call Center features

Using Automatic Answer

If have Automatic Answer enabled, you can use handsfree to answer calls. An audible tone tells you that you have an incoming call. Ask your Call Center Administrator if you have Automatic Answer enabled. Handsfree calls are convenient and time saving because you do not have to use the handset or press buttons on your telephone. If you use Automatic Answer, be sure to activate the Not Ready feature before you leave your desk so that callers are not routed to your skillset when you are away.

Transferring calls

If you have a caller who needs to talk to another person or is routed to the wrong skillset, you can transfer the call. Do not use the Call Park feature.

Transferring a call

1. Press [Transfer] [7] [0], or TRANSFER on a two line display telephone.
2. Enter the extension of the person or skillset.
3. Press [Transfer], or JOIN on a two line display telephone.

Viewing call information

Your telephone display show information about your current call. Information about Multimedia Call Center calls is not displayed.

Viewing call information

Press INFO to display:

- the skillset the call came from
- the telephone number the caller is calling from
- the caller name
- Dialed Number Identification Service (DNIS) information
- how long the call has been waiting
- the skillsets you are logged on to
- whether you are logged on or off
- whether your telephone is idle or on a call

Features not to use while you are logged on

Call Park

Instead of using Call Park to transfer a call to another agent or send the call back to a skillset:

- to send the call to a specific agent, enter the Transfer Feature Code (✆ 7 0) and enter the agent's extension number
- to send the call to a skillset, enter the Transfer Feature Code (✆ 7 0) and enter the mailbox number of a skillset to send the call to a skillset

Call Forward

Do not use Call Forward (✆ 9 8 4 or ✆ 4) to forward calls.

Call Pickup

Do not use Call Pickup to retrieve a call that is ringing on another agent's phone.

Instead:

- let the call ring at the agent's phone until the number of rings for Transfer Callback Timeout is reached

  or
- enter the Not Ready Feature Code (✆ 9 0 8) on the other agent's phone

Do Not Disturb

Instead of using Do Not Disturb, use the Not Ready Feature Code (✆ 9 0 8)

Call Forward No Answer

You can use Call Forward All Calls, Call Forward No Answer, and Call Forward on Busy only to the voicemail extension.

Skillset mailboxes

Each skillset has a skillset mailbox assigned to it. Skillset mailboxes store messages left by callers. Check these mailboxes on a regular basis to ensure that customer messages are responded to promptly.

Checking skillset mailboxes for messages

Frequently check skillset mailboxes for messages. Only one agent at a time can retrieve messages from each skillset mailbox. If different agents access the messages in the skillset mailbox throughout the day, each agent should:

- listen to the message
- write down what the message says
- erase the message
- return the caller's telephone call

If the caller is not available, the agent can try again later or give the message to another agent. If only one agent retrieving the messages at your call center, this agent does not need to transcribe and delete each message before callback. This agent handles messages and knows the status of the old messages.

Playing messages in a skillset mailbox

1. Press [ ] 9 8 1.
   Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.
2. Press PLAY or 2 to listen to your messages.
   For other options, refer to the user card for your telephone, the *CallPilot Reference Guide*, or the *Call Center Set Up and Operation Guide*.
3. Press [ ] to end the session.