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Nortel Networks Call Center Set Up and Operation Guide

NORTEL
NETWORKS™

Nortel Networks Call Center Set Up and Operation Guide

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Contents

Chapter 1	
About Nortel Networks Call Center	9
Professional and Basic Call Center	9
Call Center features	10
Using CallPilot call routing with Call Center	12
Auto Attendant	12
Custom Call Routing (CCR)	12
A comparison of Basic and Professional Call Center	13
Call Center maximum capacities	15
Related documents	15
How to get help	16
Chapter 2	
About setting up Call Center	17
Using CallPilot Manager to set up Call Center	17
About the CallPilot Manager interface	19
System timeout	19
Call Center password access	20
Setting up Call Center from a two line display telephone	21
System timeout	21
Using the dialpad	22
Symbols and conventions used in this guide	23
About telephone buttons	23
Checking which telephone mailbox interface you use	24
Chapter 3	
Using Feature Codes	25
Feature Codes	25
Programming a memory button with a Feature Code	26
Feature Codes used by the Call Center Administrator	27
Feature Codes used by Call Center agents and supervisors	28
Agent Feature Codes	28
Chapter 4	
Setting up Call Center agents	29
About adding agents	29
Agent properties	29
Adding an agent or a supervisor	31
Adding more than one agent	32
Changing agent information	33
Resetting an agent's password	33
Deleting an agent	34
Logging an agent off	35

Chapter 5	
Setting up skillsets	37
About skillsets	37
How incoming calls are sent to a skillset	37
Skillset properties	38
Setting up or changing a skillset	41
Setting up DID routing	43
Setting up CLID/DNIS Routing	44
Examples of using CLID/DNIS Routing	44
CLID/DNIS Routing Table properties	45
Changing a CLID/DNIS Route	47
Assigning an agent to a skillset	49
Dynamic Agent Priority	49
Changing an agent's priority in a skillset	51
Unassigning an agent from a skillset	52
Viewing agents in a skillset	53
Enabling a skillset	54
Disabling a skillset	55
Unconfiguring a skillset	56
Chapter 6	
Setting up skillset mailboxes	57
About skillset mailboxes	57
Determining a skillset mailbox number	58
Initializing a skillset mailbox	59
Opening a skillset mailbox	60
Opening a skillset mailbox remotely	61
Skillset mailbox password	62
Changing a skillset mailbox password	62
Resetting a skillset mailbox password	63
Recording skillset mailbox greetings	64
Examples of Primary and Alternate greetings	64
Choosing a Primary or Alternate skillset mailbox greeting	66
Recording a Personalized skillset mailbox greeting	68
Deleting a Personalized skillset mailbox greeting	69
Checking skillset mailboxes for messages	70
Playing skillset mailbox messages	71
Retrieving erased messages	74
Replying to messages	75
Replying to an internal caller	75
Replying to an external caller	77

Chapter 7	
Off-premise Message Notification	79
About Off-premise Message Notification	79
Assigning an outdial method to a skillset mailbox	80
Off-premise Message Notification parameters	81
Setting up Off-premise Message Notification	82
About setting up Off-premise Message Notification to a pager number	87
Changing Off-premise Message Notification	92
Deleting a destination number	100
Adding a destination number	101
Turning Off-premise Message Notification on or off	102
Chapter 8	
Recording Call Center Greetings	103
About Call Center greetings	103
Types of Call Center greetings	103
Recording a Call Center greeting	105
Importing a Call Center greeting	107
Exporting a Call Center greeting	108
Chapter 9	
Setting up Routing Tables	109
About Routing Tables	109
About Intelligent routing	109
Intelligent Overflow Routing	110
Examples of Intelligent Overflow Routing rules	112
Assigning Intelligent Overflow Routing to a skillset	117
Moving an Intelligent Overflow rule	119
Modifying an Intelligent Overflow Rule	120
Deleting an Intelligent Overflow Rule	120
Day and Night Routing Tables	121
Fax Detection	121
About types of Routing Table steps	122
Greeting step parameters	123
Adding a Greeting step	124
Adding a Distribute for step	127
Adding a Goto step	128
Adding a Transfer step	129
Adding a Disconnect step	130
Assigning Routing Table hours of operation	131
Setting the Service Mode for skillsets	133
Example of a Day Routing Table	135
Example of a Night Routing Table	137
Changing a Routing Table	138

Reviewing Routing Table steps	138
Modifying Routing Table steps	138
Deleting Routing Table steps	139
Creating Caller Input Rules	140
Using wildcard characters	144
An example of using Intelligent Caller Routing, Advanced	144
Changing a Caller Input rule	146
Deleting a Caller Input rule	147
Clearing a Caller Input Rule Table	147
Chapter 10	
Line administration	149
Configuring lines	149
Configuring several lines	151
Setting the Answer Lines status	152
Chapter 11	
Setting up Call Center general properties	153
Assigning the Call Center language	153
General Call Center properties	155
Primary and Secondary alert times	155
Reserved channels	156
Master Client Address	156
Setting up general Call Center properties	157
System Configuration Report	158
Enabling Software Authorization Codes	160
Chapter 12	
Monitoring Call Center call activity	163
Monitoring call activity	163
Monitoring agent calls with Silent Monitor	163
Using Silent Monitor with Answer DN	163
Use a headset to monitor calls	164
Monitoring tips	164
Logging on and monitoring agent calls	164
About monitoring sessions	166
Monitoring skillsets	167
To monitor skillsets	167
An example of monitoring skillsets	168
Using a memory button to monitor calls waiting in skillsets	168
Taking some Not Ready time	169
Using Not Ready	169
Programming Not Ready to a memory button	169
Logging off	170
Changing your supervisor password	170

Chapter 13	
Tips for operating Call Center	171
Agent administration	171
Skillset administration	171
Call Center greetings	171
Routing Table administration	172
Call Center general parameters	172
How to calculate the longest time a caller can be on hold	173
Tips to improve the efficiency of Call Center	174
Chapter 14	
Troubleshooting Call Center	175
Resetting passwords	175
Resetting the Operator password	175
Resetting the Call Center Administrator password	176
Agent problems	177
Agent log on problems	177
Features that logged on agents can use	177
Skillset problems	179
Problems enabling skillsets	179
Problems changing skillset properties	179
Problems viewing skillset settings	179
Call processing problems	180
Chapter 15	
Call Center Programming Record	181
Feature Codes	182
General Call Center properties	182
Operator/Business Status	182
Call Center skillsets	183
Intelligent Overflow Routing	184
Call Center agents	185
Skillset assignments	186
Skillset mailboxes	187
Routing Tables	188
Caller Input Rules	189
Intelligent CLID/DNIS Routing	190
Line answering	191
Glossary	193
Index	199

Chapter 1

About Nortel Networks Call Center

This guide leads a Call Center Administrator or a System Administrator through setting up and operating Call Center, and is an ongoing reference.

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 matches the needs of the caller. Calls can be routed based on the origin of the call, the destination of the call, or the information entered by the caller. Callers can be given high or low priorities. Callers can overflow to different groups or skillsets of agents, transfer out of the system, leave a message, and hear announcements or informative messages.

You set up and operate Call Center through CallPilot Manager, the web-based interface, and from a telephone. If you use the CallPilot 150 system you can set up and administer some Call Center functionality from a two line display telephone.

Professional and Basic Call Center

Basic Call Center and Professional Call Center are available. The table [“A comparison of Basic and Professional Call Center” on page 13](#) shows the differences between them. You can use Basic Call Center on a CallPilot 150 system. You can use Basic or Professional Call Center on a Business Communications Manager 3.0 system.

Call Center features

Call Center has many features that give your call center advanced and flexible call handling.

<p>Intelligent Routing</p>	<p>Intelligent Routing gives you advanced methods for routing calls through your call center. How calls are directed is based on various input conditions.</p> <p>Intelligent CLID/DNIS Routing:</p> <ul style="list-style-type: none"> • is the ability to route calls according to CLID/ANI, DNIS, ISDN Calling Number • is applied when calls first enter the Call Center • is available if you use Professional Call Center <p>Intelligent Caller Input Routing, Basic:</p> <ul style="list-style-type: none"> • is the ability to route calls to the Auto Attendant, a Custom Call Routing (CCR) Tree, the operator or a skillset mailbox • routing is applied when the caller presses a telephone button in response to instructions played in a greeting <p>Intelligent Caller Input Routing, Advanced:</p> <ul style="list-style-type: none"> • includes the Basic capabilities plus the ability to create rules that route calls to other skillsets and locations depending on the caller input • is available if you use Professional Call Center • lets you change the priority of the call <p>Intelligent Overflow Routing:</p> <ul style="list-style-type: none"> • routes calls to an extension, a mailbox, an external phone number, the Auto Attendant, a skillset mailbox or a CCR Tree • lets you change the priority of the call • is available if you use the Business Communications Manager 3.0 system
<p>Flexible routing steps</p>	<p>You can assign these routing steps to Day and Night Routing Tables, Overflow and Advanced Call Input Routing:</p> <ul style="list-style-type: none"> • transfer to a mailbox • transfer to an extension • transfer to an external telephone number • transfer to the Auto Attendant • transfer to an operator • transfer to a skillset mailbox • transfer to a CCR Tree
<p>Agent priority and dynamic agent priority</p>	<p>You can assign agents a priority that represents their level of expertise. You can assign an agent a priority between 1 and 20, where 1 is the highest priority.</p> <p>If you use Call Center Professional you can assign agents different priority levels depending on the skillset they are logged on to.</p>
<p>Choice of call presentations</p>	<p>You can assign agents forced calls, or let agents answer calls manually.</p>

Dynamic call priority	<p>You can have the priority of a call changed in the Intelligent CLID/DNIS Routing table, the Intelligent Caller Input Routing Table and the Intelligent Overflow Routing table.</p> <p>With call priority, all calls that have a higher priority are handled before lower priority calls, no matter how long the lower priority calls are waiting. For an example of using Intelligent Overflow Routing to control call priority, see “Example 2” on page 112.</p>
Delegated access to Call Center	<p>You or the System Administrator can create a password to give a supervisor access to Call Center administration.</p>
Multimedia Call Center	<p>If you have Multimedia Call Center enabled, agents can have multimedia sessions with callers. Callers click an HTML voice button icon to connect to the call center.</p>
CallPilot Manager	<p>CallPilot Manager is a web-based interface you can use to administer CallPilot and Call Center.</p>
Call monitoring	<p>Agents can monitor the call activity in the skillsets they are logged on to. You and supervisors can monitor the call activity per skillset or on a system wide basis.</p>
Call Center Reporting	<p>You can generate the System Configuration report to view Call Center settings.</p> <p>If you have Call Center Reporting enabled, you can view real time statistics and comprehensive management information about the day-to-day performance of your call center.</p>

Using CallPilot call routing with Call Center

CallPilot is a versatile business communications tool that you can use to:

- answer incoming calls
- offer callers a selection of options to route their calls or access information
- provide advanced voicemail, Auto Attendant and call handling capabilities

CallPilot has two powerful call routing features: Auto Attendant (AA) and Custom Call Routing (CCR). These features route incoming calls to telephones and voice mailboxes. You can also use these features to route calls to Call Center skillsets.

Auto Attendant

The Auto Attendant answers incoming calls and presents callers with a greeting. After the greeting, the Auto Attendant Menu offers callers a range of options that they can select using the dialpad of their telephone. Using these options, callers can transfer themselves from the Auto Attendant to a skillset by entering the Control DN of the skillset.



Note: Include the number of the Control DN in your Auto Attendant Greeting.

For information about how to configure the Auto Attendant, refer to the *CallPilot Set Up and Operation Guide*.

Custom Call Routing (CCR)

With CCR you can replace the Auto Attendant menu with an expanded menu that can include several sub-menus to offer callers a wider range of options. You can give callers access to a Call Center skillset by adding an internal transfer that transfers the caller to the Control DN of the skillset.

For more information about transfers and CCR, refer to the *CallPilot Manager Set Up and Operation Guide*.

A comparison of Basic and Professional Call Center

Features	Basic Call Center for CallPilot 150	Professional Call Center for Business Communications Manager 3.0	Basic Call Center for Business Communications Manager 3.0
Number of skillsets	2	50	2
Number of configured agents (available agent IDs)	20	250	20
Number of agent priority levels	20	20	20
Dynamic agent priority levels	Not available	20	Not available
Number of active agents	10	80	10
Number of active calls in all skillsets	15	48	15
Maximum number of active calls per skillset	15	100	15
Number of lines that can be configured for Call Center	15	100	15
Number of voice ports (shared with CallPilot or dedicated)	8	16	16
Number of routing tables per skillset	2	2	2
Number of greetings	10	150	10
Number of steps per routing table	20	20	20
Number of overflow rules per skillset	20	20	20
Number of skillset mailboxes	2	50	2
Number of supervisors	10	80	10
Supervisor functionality, including call monitoring	Available	Available	Available
Maximum number of simultaneous monitoring sessions	7	7	7
Intelligent Caller Input Routing, Basic: the ability to route a call to an Operator, Auto Attendant, skillset mailbox, CCR Tree or internal or external number	Available	Available	Available
Intelligent Caller Input Routing, Advanced: the ability to route a call based on multi-digit fixed or variable strings	Not available	Available	Not available

Features	Basic Call Center for CallPilot 150	Professional Call Center for Business Communications Manager 3.0	Basic Call Center for Business Communications Manager 3.0
Delegated Call Center Administration: the System Administrator can create a password to give a Call Center Administrator or supervisor access to Call Center administration.	Available	Available	Available
Intelligent Overflow Routing: rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, the Auto Attendant or an operator.	Available	Available	Available
Intelligent CLID/DNIS Routing	Not available	Available	Not available
Overflow rules per skillset	20	20	20
Overflow skillsets	1	49	1
Day of Week Service: you specify the start and end times for the day and night skillset for each day of the week	Available	Available	Available
Limited Feature 983 telephone administration	Available	Not available	Not available
CallPilot Manager	Available	Available	Available
Call Center Reporting	Enabled with optional Software Authorization Code	Available	Enabled with optional Software Authorization Code

Call Center maximum capacities

The Call Center maximum configuration limits are:

- 80 active agents
- 100 configured lines
- 50 skillsets
- 48 maximum simultaneous incoming calls; up to 24 of these can be VoIP trunks



Note: We recommend that you do not configure more than 48 lines; up to 24 of these can be VoIP trunks.

Related documents

For more information about Call Center refer to the:

- *Nortel Networks Call Center Agent Guide*
- *Nortel Networks Call Center Supervisor Guide*
- *CallPilot 150 Call Center Telephone Administration Guide*
- *Nortel Networks Call Center Reporting Set Up and Operation Guide*
- *Multimedia Call Center Set Up and Operation Guide*
- *Multimedia Call Center Web Developer Guide*

For information about setting up CallPilot refer to the:

- *Call Pilot Manager Set Up and Operation Guide*
- *CallPilot 150 Telephone Administration Guide*
- *CallPilot 150 Installation and Maintenance Guide*

For information about configuring telephony resources, refer to the:

- *Business Communications Manager 3.0 Programming Operations Guide*
- *Norstar System Coordinator Guide*

How to get help

USA and Canada

Authorized Distributors - Technical Support

Telephone:

1-800-4NORTEL (1-800-466-7835)

If you already have a PIN Code, you can enter Express Routing Code (ERC) 196#.

If you do not yet have a PIN Code, or for general questions and first line support, you can enter ERC 338#.

Website:

<http://www.nortelnetworks.com/support>

email:

naitas@nortelnetworks.com

Presales Support (CSAN)

Telephone:

1-800-4NORTEL (1-800-466-7835)

Use Express Routing Code (ERC) 1063#

EMEA (Europe, Middle East, Africa)

Technical Support - CTAS

Telephone:

00800 800 89009

Fax:

44-191-555-7980

email:

emeahelp@nortelnetworks.com

CALA (Caribbean & Latin America)

Technical Support

Telephone:

1-954-858-7777

email:

csrmgmt@nortelnetworks.com

APAC (Asia Pacific)

Technical Support

Telephone:

+61 388664627

Fax:

+61 388664644

email:

asia_support@nortelnetworks.com

Chapter 2

About setting up Call Center

You can set up Call Center using a display telephone on your phone system, or using the web-based CallPilot Manager on a web browser from a computer on your network. For some Call Center tasks, such as initializing skillset mailboxes, you must use a phone. If you use Basic Call Center on CallPilot 150 you can do many Call Center tasks from a phone. Refer to the *CallPilot 150 Call Center Telephone Administration Guide* for more information.

Using CallPilot Manager to set up Call Center

CallPilot Manager operates on a CallPilot 150 or Business Communications Manager 3.0 system. You access CallPilot Manager on a web browser from a computer on your network.

System requirements

Before you use CallPilot Manager, your Business Communications Manager 3.0 or CallPilot 150 system must be configured and Call Center must be enabled. For how to enable software authorization codes for Call Center, refer to [“Enabling Software Authorization Codes” on page 160](#).

Computer requirements

The computer you use to run CallPilot Manager must have:

- Windows 95 or later, with P133 or later CPU (or compatible)
- 64 MB RAM, 10 MB disk space
- Minimum screen resolution of 1024 X 768 pixels

Browser requirements

To use CallPilot Manager you must have:

- Java Virtual Machine 5.0 (build 5.0.0.3188 or later)
- either Microsoft Internet Explorer 4.0 or later, or Netscape Communicator 4.0.5 or later, but not Netscape 6.0

If you use Netscape Communicator, set these parameters:

- Enable Java: on
- Cached document comparison: every time
- If you use Netscape Communicator version 4.77 and not all the Call Center settings shown in this guide appear in your browser, refresh the browser by clicking the View menu and clicking Reload. If you still cannot view the settings, upgrade your browser.

If you use Microsoft Internet Explorer, set the following parameters:

- Check for newer versions: every visit to the page
- Java JIT compiler enabled: on

For more information about these settings, refer to your web browser online Help.

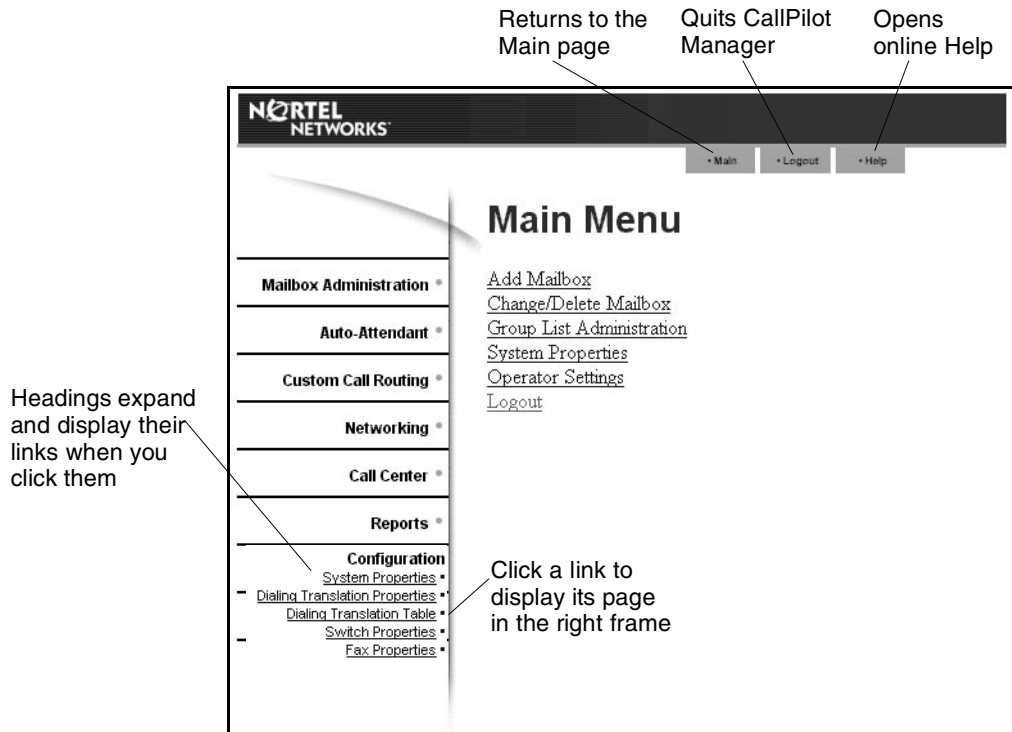
To start CallPilot Manager on Business Communications Manager 3.0

- 1 Point your web browser to `http://<IP address>:6800/CallPilotManager` where <IP address> is the IP address of Business Communications Manager 3.0. For information about the IP address, ask your network administrator. The Administration Login page appears.
- 2 In the **Password** box, type the System Administrator password.
- 3 Click the **Submit** button. The CallPilot Manager Main Menu appears.

To start CallPilot Manager on CallPilot 150

- 1 Point your web browser to `http://<IP address>/CallPilotManager`. Where <IP address> is the IP address of the CallPilot 150. For information about the IP address, ask your network administrator. The Administration Login screen appears.
- 2 In the **Password** box, type the System Administrator password.
- 3 Click the **Submit** button. The CallPilot Manager Main Menu appears.

About the CallPilot Manager interface



System timeout

A CallPilot Manager session times out after 10 minutes of inactivity. This is a security feature that prevents unauthorized access to the system.

If your session times out, the login page appears and a message that says that the session has expired. You must log on to continue programming Call Center.

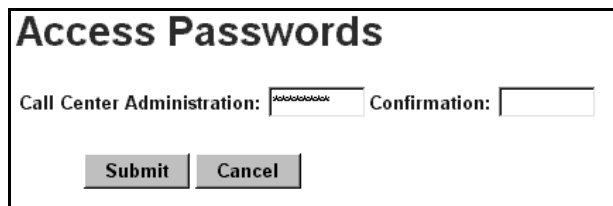
If the system times out while you are working on a page, any settings that you have not entered on the system by pressing the Submit button are not entered.

Call Center password access

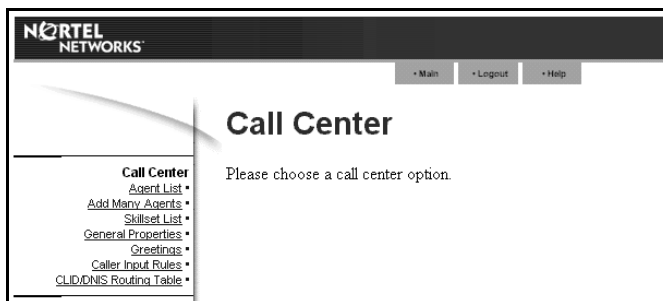
If you want to limit access to CallPilot Manager, you can create or change a Call Center Administrator password that limits CallPilot Manager access to just the Call Center settings.

To create a Call Center Administrator password

- 1 Start CallPilot Manager.
- 2 Click the **Configuration** heading.
- 3 Click the **Access Passwords** link.
The Access Passwords page appears.



- 4 In the **Call Center Administration** box enter the Call Center Administrator password. The password must be from four to eight numbers long and cannot start with zero.
- 5 In the **Confirmation** box enter the Call Center Administrator password.
- 6 Click the **Submit** button.
The Call Center Administrator can log on using this password.



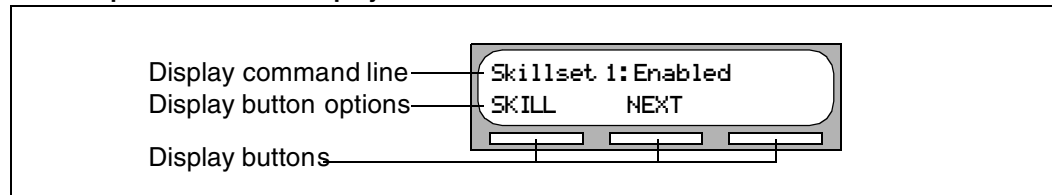
If you create a Call Center Administrator password, the Call Center settings that can be accessed are:

- Agent List
- Add Many Agents
- Skillset List
- General Properties
- Greetings
- Caller Input Rules
- CLID/DNIS Routing Table

Setting up Call Center from a two line display telephone

You cannot use a single line display telephone to set up and administer Call Center on CallPilot 150. You must use a two line display telephone. Two line display phones show CallPilot and Call Center commands and options. A two line display can show up to three display options at once. In some instances, an option does not have a corresponding display button, and you must select the option by pressing buttons on the keypad.

An example of a two line display



Call Center agents can use two line display telephones and one line display telephones. Supervisors must use two line display telephones with the handsfree mute feature. Non display telephones, such as telephones attached to an analog terminal adapter, cannot be used for Call Center agent tasks. We recommend that you read the telephone user card for your telephone before proceeding.



Note: If you use a phone to set up Call Center on CallPilot 150, you must use a two line display telephone. You can use a phone to set up Call Center only if you use CallPilot 150. You cannot use a phone to set up Call Center if you use Business Communications Manager. You can also use CallPilot Manager to set up Call Center.

System timeout

If you pause longer than 2 minutes (150 seconds) when you program Call Center on a two line display telephone, the system times out and ends the session. This is a safety feature that prevents unauthorized use of the system.

If the system times out while you are setting up Call Center, the settings are entered in the system. To continue programming, you must log on again and change the settings.

Using the dialpad

The buttons on your display telephone dialpad act as both numbers and letters. Each button represents a number and letters of the alphabet.

To enter a character	press the dialpad button that represents the letter or number. Press the button again to see the next letter or number.
To accept a character	press # or press another button. When you press another button, the cursor advances and the display shows the first character on the new button.
To delete a character	press the BKSP display button.

Letters and numbers on the dialpad

1 1 ' -	2 A B C 2 a b c	3 D E F 3 d e f
4 G H I 4 g h i	5 J K L 5 j k l	6 M N O 6 m n o
7 P Q R S 7 p q r s	8 T U V 8 t u v	9 W X Y Z 9 w x y z
* Quit	0 Q Z Zero q z	# Accepts the displayed letter enters a comma (,)

The display can show up to 16 characters. The prompt remains on the display if you enter fewer than ten characters. If you enter information where the prompt and the information is fewer than 16 characters, you can see both the prompt and the information you enter.

```
Pswd:1111
OTHR  RETRY  OK
```

This is an example of a display with fewer than 16 characters, where the command line prompt remains on the display.

```
Name:
RETRY  BKSP  OK
```

This display shows the **Name:** command line prompt.

```
P
RETRY  BKSP  OK
```

When you begin to enter the last name, the **Name:** command line prompt disappears. For example, if you enter the name Partridge, you press **7** for P, and the display drops the **Name:** prompt.

```
PARTRIDGE
RETRY  BKSP  OK
```

Although the name is only nine characters long, the command line prompt is not shown on the display after you enter the entire name.

The prompt disappears for these command line prompts:

- Name:
- Log:
- Dest ph:




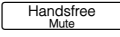


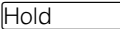

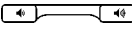
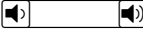
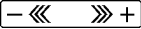



Symbols and conventions used in this guide


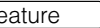




These conventions and symbols are used to represent the Business Series Terminal display and dialpad.


Convention	Example	Used for
Word is in a special font (in the top line of the display)	Pswd:	Command line prompts on display telephones.
Underlined word in capital letters (shows bottom line of a two line display telephone)	<u>PLAY</u>	Display option. Available on two line display telephones. Press the button directly below the option on the display to proceed.
Dialpad buttons	#	Buttons you press on the dialpad to select a particular option.


About telephone buttons

This table shows the Nortel Networks Business Series Terminal buttons. Use the buttons that pertain to the type of telephone you use.

Button name	T7100, T7208, T7316	M7100, M7208, M7310, M7324	M7100N, M7208N, M7310N, M7324N
Feature			
Handsfree	Bottom right-hand button		
Hold			
Volume Control			
Release			

You can enter ,  or  and the code to use a feature. For example, press  9  8  1 to access your mailbox.

The T7100 works differently from other telephones on your system because it does not have line buttons. Where other telephones require that you select a line button to answer a call, on the T7100 terminal you pick up the handset. Where other telephones require you to select a line button to take a call off hold, you press  on the T7100 terminal.

On T7100 terminals, you can answer a second call by pressing . Your active call is put on hold and you connect to the waiting call. You can have no more than two active calls at one time.

Checking which telephone mailbox interface you use





CallPilot supports two interfaces: Norstar Voice Mail and CallPilot.

The System Administrator determines which interface is assigned to your mailbox.

Follow the procedures in this guide that apply to the interface you use.

Some procedures apply to both interfaces.

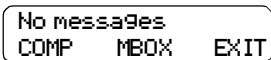
To check which mailbox interface you use

- 1 Press     .
Follow the voice prompts or the display button options to open your mailbox.
- 2 Check the display to see which interface you use:




0 new 0 saved
PLAY REC ADMIN

This is the Norstar Voice Mail interface.



No messages
COMP MBOX EXIT

This is the CallPilot interface.

- 3 Press  to end the session.

Chapter 3



Using Feature Codes

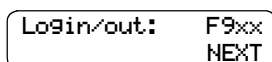
You use Feature Codes to perform Call Center functions on your telephone.

Feature Codes

Feature Codes are assigned during installation. This guide shows the default Feature Codes. Call Center can also use custom Feature Codes. If the default Feature Codes are used by another application, your system automatically assigns custom Feature Codes. If your System Administrator has assigned custom Feature Codes, you can use the table “[Feature Codes](#)” on page 182 to record the Custom Feature Codes.

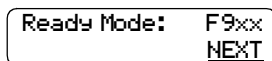
To determine the Feature Codes

1 Press  9  1.



2 The display shows the name and number of the Log In/Log Out Feature Code. xx represents a number between 00 and 99.


3 Press NEXT.



4 The display shows the name and number of the Ready Mode Feature Code.

5 Press NEXT to see more Feature Codes.

6 When the display shows QUIT you have seen all the Feature Codes.

7 Press  to end the session.

Programming a memory button with a Feature Code

Each Feature Code can be programmed to a memory button. We recommend that you use memory buttons with indicators to program the Feature Codes. A memory button indicator is the triangle next to a memory button.

You can use memory buttons to monitor call activity, and view the Login/Logout and Not Ready status of agents. For information about how the status appears, refer to the *Nortel Networks Call Center Agent Guide*.

For information about using programmed memory buttons to monitor call activity, refer to [“Primary and Secondary alert times” on page 155](#).

To program a memory button

- 1 Press * .
Do not lift your handset.
- 2 The display shows **Program Features**.
- 3 Press a memory button with an LCD indicator.
- 4 Press .
- 5 Enter the Feature Code number that you want to program.
For example, enter to program the Display Waiting Calls Feature Code. See the tables [“Feature Codes used by Call Center agents and supervisors” on page 28](#) and [“Agent Feature Codes” on page 28](#) for the Feature Codes.

Repeat steps 1 through 5 for each Feature Code you want to program.
- 6 The display shows that the button is programmed, and then ends the session.

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

Feature Codes used by the Call Center Administrator

Use this Feature Code	To...
Open Mailbox ☎ 9 8 1	<ul style="list-style-type: none"> open skillset mailboxes record skillset mailbox greetings listen to messages in the skillset mailbox
Operator Settings ☎ 9 8 2	<ul style="list-style-type: none"> set or change the operator extension indicate whether the operator is available select the day and night service modes for skillsets change the password for Operator Settings <p>For more information on using the Operator Feature Code, refer to “Setting the Service Mode for skillsets” on page 133 and “Resetting the Operator password” on page 175.</p>
Voicemail DN ☎ 9 8 5	<ul style="list-style-type: none"> display the skillset mailbox number (Control DN) for each skillset display the extension for Message Waiting Indication for the skillset mailbox reset the passwords of the Call Center Administrator and the operator <p>For information on the Control DN, refer to “Determining a skillset mailbox number” on page 58.</p> <p>For information on resetting the Operator and Call Center Administrator passwords, refer to “Resetting the Operator password” on page 175.</p>
Display Waiting Calls Skillset Status ☎ 9 0 9	<ul style="list-style-type: none"> view real-time status information about skillsets. You can see how busy your call center is so that you can adjust skillset staffing view whether a skillset is enabled or disabled view the number of agents logged on to the skillset view the number of calls waiting view the longest wait time of a call <p>To provide easy, one-button access to the this feature, program a memory button that has an indicator with ☎ 9 0 9 .</p> <p>Refer to “Programming a memory button with a Feature Code” on page 26.</p>
Log on/Log off Monitor skillsets ☎ 9 0 4	<ul style="list-style-type: none"> log agents off if they forget to log off. <p>For information, refer to “Logging an agent off” on page 35.</p>
Not Ready ☎ 9 0 8	<ul style="list-style-type: none"> extend a Break Time period if agents need time after calls to do paperwork or wrap up tasks. For more information about Break Time properties for a skillset, refer to “Break Time” on page 40.



Note: You can use The Log on/Log off and the Not Ready Feature Codes, but they are used primarily by agents. For information on the Feature Codes used by agents, refer to [“Feature Codes used by Call Center agents and supervisors” on page 28](#).

Feature Codes used by Call Center agents and supervisors

If you have Custom Feature Codes, record them in the table “[Feature Codes](#)” on page 182.

Agent Feature Codes

For more information on Agent Feature Codes, refer to the *Nortel Networks Call Center Agent Guide*. For more information on Feature Codes used by supervisors, refer to the “[Feature Codes used by the Call Center Administrator](#)” on page 27.

Agents use this Feature Code	To...
Open Mailbox ☎ 9 8 1	<ul style="list-style-type: none"> access messages in a skillset mailbox
Log on/Log off Monitor skillsets ☎ 9 0 4	<ul style="list-style-type: none"> log on when they are in the office view the status of the skillsets they are logged on to. Agents can program a memory button with the Log on/Log off Feature Code. The status of the calls waiting in the skillset is shown by the flash rate of the indicator. For more information refer to “Primary and Secondary alert times” on page 155.
Not Ready ☎ 9 0 8	<ul style="list-style-type: none"> activate or cancel the Not Ready feature on their telephone. If the work resulting from a call requires extra time to complete, an agent can use the Not Ready Feature Code to prevent Call Center from routing another call to them. If an agent makes a phone call, or if a supervisor is monitoring a call, they first use the Not Ready Feature Code to activate the Not Ready feature. When the agent is ready to receive calls, they use this Feature Code to cancel the Not Ready feature and receive calls again. If an agent does not answer a call within a certain number of rings, the call is returned to the skillset and the agent telephone is automatically placed into Auto Busy Mode or Auto Logout Mode. The agent must manually cancel the Auto Busy Mode feature by using the Not Ready Feature Code to continue to receive calls.
Display Waiting Calls ☎ 9 0 9	<ul style="list-style-type: none"> Agents who answer calls only during peak call periods can use Display Waiting Calls to see which skillsets have the most call activity.

Chapter 4

Setting up Call Center agents

Agents handle the calls in your call center. Supervisors are agents with additional capabilities. Supervisors can change their own password and monitor calls between agents and callers.

About adding agents

Before you can add agents to your Call Center you must purchase and enable a Software Authorization Code for the number of agents that you want to add. The number of agents you can add to your call center is determined by the number of agents the Software Authorization Code enables. For how to enable a Software Authorization Code refer to [“Enabling Software Authorization Codes” on page 160](#).

For more information about Call Center agents, refer to the *Nortel Networks Call Center Agent Guide*.

Agent properties

Agent ID	Each agent is assigned a unique ID number. Call Center assigns the lowest available ID number. You can assign a different ID number. Statistics are collected and reported for each ID number. For more information on statistics, refer to “Monitoring call activity” on page 163 and refer to the <i>Nortel Networks Call Center Reporting Set Up and Operation Guide</i> . Agent ID is based on whether you use Basic or Professional Call Center, and whether you use a CallPilot 150 or Business Communications Manager 3.0.
Name	The agent name can be a maximum of 13 characters. If you do not enter a name, a default agent name appears as the word <i>Agent</i> and the ID number, for example, <i>Agent12</i> . Do not create agent names that have the same first seven characters. If you use Call Center Reporting, it truncates the agent name after the first seven characters and your agent names appear identical.
Supervisor	Super represents the status of the agent. No in the Super column means that an agent that does not have supervisor status. Yes in the Super column means that an agent has supervisor status.
Automatic Answer	Automatic Answer is optional. Select Automatic Answer if you want to force-deliver calls to an agent. If Automatic Answer is enabled, the agent hears a tone that indicates that a call is delivered. The agent is automatically in the handsfree mode. It is important that agents use the Not Ready feature when they are not available to receive calls. If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must answer calls manually. NOTE: Do not enable Automatic Answer if your call center uses Business Series Terminal telephones.

<p>Missed Call Option</p>	<p>The Missed Call Option controls how a call is treated if an agent does not answer the call. Make Not Ready assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Automatic Logout automatically logs an agent out of their skillset if they do not answer a call. The default is Make Not Ready (Return to Skillset).</p> <p>To assign how many rings before the Missed Call Option, change the timer for Transfer Callback Timeout.</p> <ul style="list-style-type: none"> • If you use a Business Communications Manager 3.0 system, refer to “Timers” section of the “Configuring System Settings” chapter of the <i>Business Communications Manager 3.0 Programming Operations Guide</i>. • If you use a CallPilot system, refer to the <i>Norstar System Coordinator Guide</i>.
<p>Accepted Call Types</p>	<p>Accepted Call Types are Voice calls only, Voice Button calls only, or both. If you do not have Multimedia Call Center enabled, Accepted Call Types does not appear.</p> <p>For more information on Multimedia Call Center refer to the <i>Multimedia Call Center Set Up and Operation Guide</i>.</p>
<p>Priority</p>	<p>If you use Basic Call Center, assign a priority to the agent. If the method of call distribution for the skillset is Preferred, the agent with the highest priority receives the call. The agent priority ranges from 1 to 20. 1 is the highest agent priority for the most qualified agents. The default value is 10. For more information about method of call distribution refer to “Method” on page 40.</p>

In addition to these agent properties, if you use Professional Call Center you can assign agents Dynamic Priority when you assign them to a skillset. For more information refer to [“Dynamic Agent Priority” on page 49](#).

Adding an agent or a supervisor

You can use the table “[Call Center agents](#)” on page 185 to record the agents you add.

To add an agent

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Agent List** link.
The Call Center Agent List appears.

Agent List						
ID	Name	Super.	Commands			
1	Munro R	No	Logged Off	Change	Reset Password	Delete
2	Jackson C	Yes	Logged Off	Change	Reset Password	Delete
3	G Dresser	No	Logged Off	Change	Reset Password	Delete
4	Martin P E F	No	Logged Off	Change	Reset Password	Delete
						Add

- 4 Click the **Add** button.
The Add Agent page appears.

Add Agent	
Agent ID:	<input type="text" value="4"/>
Name:	<input type="text" value="Agent4"/>
Supervisor:	<input type="checkbox"/>
Automatic Answer:	<input type="checkbox"/>
Missed Call Option:	<input type="text" value="Make Not Ready (Return To Skillset)"/>
Accepted Call Types:	<input type="text" value="Voice"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

- 5 If you want to change the Agent ID number, in the **Agent ID** box type the new Agent ID.
- 6 In the **Name** box type the name of the agent.
Do not use the same first seven characters for an agent name. For more information about agent names refer to “[Name](#)” on page 29.
- 7 Select the **Supervisor** check box if you want to give the agent supervisor functionality.
The default is not selected.
- 8 Select the **Automatic Answer** check box if you want calls to be force-delivered to the agent.
The default is not selected.
- 9 From the **Missed Call Option** list box select Make Not Ready (Return to Skillset) or Automatic Logout.
- 10 From the **Accepted Call Types** list box select Voice, Voice Button or Both.
If you do not have Multimedia Call Center enabled, Accepted Call Types does not appear.
- 11 If you use Basic Call Center, from the **Priority** list box select a priority for the agent.
- 12 Click the **Submit** button.

Adding more than one agent

You can save time by adding more than one agent at a time. When you add multiple agents, the agents have the default agent name and parameters.

You can use the table [“Call Center agents” on page 185](#) to record the agents you add.

To add more than one agent

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Add Many Agents** link.
The Add Many Agents page appears.

The screenshot shows a web form titled "Add Many Agents". It contains the following elements:

- ID Range:** Two input boxes, "From:" containing the number "4" and "To:" containing the number "5".
- Supervisor:** A checkbox that is currently unchecked.
- Automatic Answer:** A checkbox that is currently unchecked.
- Missed Call Option:** A dropdown menu with the selected option "Make Not Ready (Return To Skillset)".
- Accepted Call Types:** A dropdown menu with the selected option "Voice".
- At the bottom, there are two buttons: "Submit" and "Cancel".

- 4 In the **From** box type the lowest agent ID number of the agents you want to create.
- 5 In the **To** box type the highest agent ID number of the agents you want to create.
The Agent ID numbers you enter must be between 1 and 250.
- 6 Select the **Supervisor** check box if you want the agents to have Supervisor status.
- 7 Select the **Automatic Answer** check box if you want calls to be force-delivered to the agents.
- 8 From the **Missed Call Option** list box select **Make Not Ready (Return to Skillset)** or **Automatic Logout**.
- 9 From the **Accepted Call Types** list box select Voice, Voice Button or Both.
If you do not have Multimedia Call Center enabled, Accepted Call Types does not appear.
- 10 If you use Basic Call Center, from the **Priority** list box select a priority from 1 to 20 for the agent.
- 11 Click the **Submit** button.



Note: Any agents who have an agent ID number that is between the numbers you enter in the From and To boxes are not changed. These agents are not included in the number of agents added.

Changing agent information

You can change an agent's:

- name
- supervisor status
- Automatic Answer setting
- Missed Call Option
- Accepted Call Types

To change agent information

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Agent List** link.
The Agent List page appears.
- 4 Click the **Change** link for the agent you want to change.
The Change Agent page appears.
- 5 Change the properties that you want to change for the agent.
- 6 Click the **Submit** button.
Repeat steps 4 and 5 for each agent you want to change.



Note: If the agent you are changing is logged on, they must log off and log back on again for the change to take effect.

Resetting an agent's password

If an agent forgets their password, you can reset the password back to the default value (0000). After you reset the password, the agent must change their password the next time they log on.

To reset an agent's password

- 1 Log on to CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Agent List** link.
The Agent List page appears.
- 4 Click the **Reset Password** link for the agent whose password you want to reset.
A message appears that asks you to confirm the request to reset the password.
- 5 Click the **OK** button.
A message appears that the agent's password is reset. The agent password is set to 0000.
- 6 Click the **OK** button.

Deleting an agent

Deleting an agent removes the agent from Call Center. The agent is removed from the Agent List and all the skillsets they are assigned to.

If you want to remove an agent from a skillset, refer to [“Unassigning an agent from a skillset” on page 52](#).

To delete an agent

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Agent List** link.
The Agent List page appears.
- 4 Click the **Delete** link for the agent you want to delete.
A message appears that asks you to confirm the deletion.
- 5 Click the **OK** button.
A message appears that says the agent is deleted.
- 6 Click the **OK** button.



Note: If the agent you are deleting is logged on, a message appears that states that the agent is currently logged on and asks if you want to delete the agent.

To delete the agent, click the OK button.

Logging an agent off

Agents usually log out when they are no longer available to receive calls. If an agent leaves and does not log off, you can log the agent off. An agent that is logged off does not receive any new Call Center calls.

To log an agent off

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Agent List** link.
The Agent List page appears.
- 4 Click the **Force Off** link for the agent you want to log off.
A message appears that asks you to confirm the request to force off the agent.
- 5 Click the **OK** button.
A message appears that says the agent is logged off.
- 6 Click the **OK** button.
- 7 To log the agent off, click the **OK** button.
The agent status changes to Logged Off on the Agent List page.



Note: If the agent you log off is on a call, the call is not interrupted.

Chapter 5

Setting up skillsets

About skillsets

Call Center skillsets answer and distribute calls to agents as they become available. Skillsets hold calls for different call center departments, such as sales and technical support.

The maximum number of skillsets you can set up depends on whether you have Basic or Professional Call Center, and whether you use the CallPilot 150 or Business Communications Manager 3.0 system. For more information refer to [“Number of skillsets” on page 13](#).

You cannot change the properties of a skillset while it is in use. For more information, refer to [“Skillset properties” on page 38](#) and [“Configuring lines” on page 149](#).

How incoming calls are sent to a skillset

Incoming calls are sent to a skillset in one of the following ways:

- You assign a line to be answered directly by a skillset. For information about assigning lines refer to [“Setting up Call Center general properties” on page 153](#).
- A receptionist, agent or subscriber receives a call and transfers the call to a skillset. They can transfer the call to a skillset by pressing or **TRANSFER** and entering the CDN of the skillset. The receptionist, agent or subscriber must not use the Call Pickup feature.
- The Automated Attendant or a CCR Tree answers the call and the caller makes a selection that routes them to the CDN of the skillset. For more information, refer to [“Auto Attendant” on page 12](#) and [“Custom Call Routing \(CCR\)” on page 12](#).
- Calls can be forwarded to the CallPilot extension of the skillset by Call Forward All Calls (CFAC), Call Forward No Answer (CFNA) or Call Forward On Busy (CFB). For information about these features, refer to the *Business Communications Manager 3.0 Programming Operations Guide* or the *Norstar System Coordinator Guide*.



Note: Agents are restricted in how they can use CFAC, CFNA and CFB. For more information refer to [“Features that logged on agents can use” on page 177](#).

Skillset properties

Skillset	The number between 1 and 50 that is assigned to the skillset.
Control DN	<p>The Control Directory Number is the extension associated with the skillset. Incoming calls transfer to the CDN of each skillset from extensions, the Automated Attendant or Custom Call Routing. The CDN is the skillset mailbox number.</p> <p>You can use B2 DNs on Business Communications Manager systems only if you have upgraded your system to 3.0. If you have a new Business Communications Manager system, you cannot use B2 DNs.</p> <p>If you use Interactive Voice Response or any other application that uses Auto Assign, you must delete any Call Center CDNs before you install the other applications. After you install the applications you must set up the Call Center CDNs again.</p> <p>When you assign a CDN to a skillset:</p> <ul style="list-style-type: none"> • If you use Business Communications Manager, do not program any new skillsets to use DNs that reside on ports 01xx or 08xx (or 07xx if you use a 5/3 split system). Neither Call Center nor other system components (including the core) are guaranteed to be robust with this configuration. This does not apply to you if you use a CallPilot 100/150 system. • It can be a B1 extension number that is not connected to any telephone or peripheral. • It can be a B2 extension that is not connected to a B2 application. • If a telephone or any other device uses the same extension the call center will not answer calls. • On a Business Communications Manager system, you can determine the range of B1 extensions by using the Unified Manager. The DNs do not have to be physically equipped with a Media Bay Module. • The system assigns a skillset mailbox that uses the CDN as its mailbox number. You must initialize the mailbox before you can use the skillset or the mailbox. • Do not rename a telephone DN to a CDN used by Call Center. • Do not assign IP telephones to the DN used by Call Center. The user does not receive an error message if this happens, even though IP telephones usually warn a user if there are conflicting telephone DNs. Therefore, ask your System Administrator for a list of the CDNs that are used by Call Center. • Do not use any CDNs that are used by Interactive Voice Response as Call Center CDNs.

	<p>You can use B2 CDNs if:</p> <ul style="list-style-type: none"> • you use a CallPilot 150 platform. CallPilot 150 has a B2 DN for every B1. • you use a Business Communications Manager system that has legacy B2 CDNs. <p>Your Call Center has legacy B2 CDNs if:</p> <ul style="list-style-type: none"> - you have upgraded your system to 3.0 and - your Business Communications Manager system is in Partial Double Density mode (this is the default mode) and the B2s on buses 6 and 7 were configured as CDNs before the upgrade.
	<p>About Partial Double Density mode:</p> <p>A B2 extension is a spare extension that exists on buses 6 and 7 only if you have Partial Double Density mode enabled. All other buses have only B1 extensions, no matter what mode the Business Communications Manager is in.</p> <p>Partial Double Density mode is the default setting for Business Communications Manager 3.0.</p> <p>Partial Double Density mode allows compatibility with Companion base stations.</p> <p>You can manually change CDNs from B1s to B2s by entering a B1 CDN in the skillset properties. If the Business Communications Manager is changed to Full Double Density mode, the system will change the B2 CDNs to B1s.</p> <p>About using B1 and B2 extensions:</p> <ul style="list-style-type: none"> • We recommend that you use B1 CDNs over B2 CDNs. B1 CDNs have better functionality than B2 CDNs. • A B1 extension number is the extension number that you dial to call a telephone or peripheral. A B2 extension is a spare extension. • All other buses have only B1 extensions. They do not have B2 extensions no matter what mode the Business Communications Manager 3.0 is in. • Both B1 and B2 extensions can answer external calls. • Both B1 and B2 extensions can have external calls transferred to them by a third person. • B1 extensions allow a set to be CFB or CFNA to them. B2 extensions do not support CFB or CFNA. Therefore a skillset that uses a B2 CDN cannot have calls forwarded to it from telephone programming. • B2 CDNs cannot be used as a prime set for target lines. <p>For information about determining available B1 and B2 extensions on buses 6 and 7 when you use Partial Double Density mode, refer to the <i>Business Communications Manager 3.0 Programming Operations Guide</i>.</p>
<p>Name</p>	<p>The skillset name is displayed:</p> <ul style="list-style-type: none"> • on Call Center displays to identify the skillset • in reports • as the skillset mailbox name <p>The skillset name can be a maximum of 16 characters. If you do not enter a name, the skillset name defaults to <i>SKILLn</i> where <i>n</i> is the skillset number. The name for each skillset is the same as the skillset mailbox name.</p>

MWI DN (Message Waiting Indication extension)	The Message Waiting Indication extension is an optional phone number that indicates that a skillset mailbox has messages waiting. The MWI extension that you assign shows <i>Message for you</i> on the telephone display when there are new messages in the skillset mailbox. The MWI DN defaults to None. If you forget the MWI extensions for a skillset mailbox, you can view the MWI extensions by using the procedure “Determining a skillset mailbox number” on page 58 .
Method (Method of Call Distribution)	The method of call distribution determines to which of several available agents to route the call. There are two methods of call distribution: Least Busy and Preferred. Least Busy routes the call to the agent who has been available the longest. Preferred routes the call to the agent with the highest priority (best qualified agent is 1). If there are several agents with the highest priority, the agent available longest with that priority will be selected. The default method of call distribution is Least Busy. If you use Call Center Professional you can assign agents different priorities depending on the skillsets they belong to. For more information refer to “Dynamic Agent Priority” on page 49 .
Break Time	Break Time is a time period for agents to complete paperwork after they finish a call. After an agent completes a call, they are taken out of the skillset for the Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code. For more information, refer to “Not Ready” on page 27 . The Break Time period can last from zero to 59 minutes, 59 seconds. The Break Time defaults to 30 seconds. You can change the Break Time period to zero if an agent does not need a Break Time.
Delay Answer	Delay Answer is a toll-saving feature that prevents Call Center from answering calls and playing greetings when there are no agents available. When a call comes in on a line belonging to a skillset that has no free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever happens first. During the Delay Answer time, the waiting callers hear ringback. To activate the Delay Answer feature, enter a time for Delay Answer. The Delay Answer time can be a minimum of zero seconds and a maximum of 10 minutes. The default Delay Answer time is 00:00.
Attendant extension	The attendant extension is the extension used if a caller requests to talk to the operator after the caller transfers to the Automated Attendant or CCR. The attendant extension is optional. If you do not assign an attendant extension, the call is sent to the system attendant extension.
Language preference	Language preference can be either Primary or Alternate. The language preference is the language choice used for prompting callers who transfer to the Automated Attendant or CCR. Language preference appears only on a system that is configured as bilingual.

Setting up or changing a skillset

You can record skillset properties in the table “[Call Center skillsets](#)” on page 183.



Note: Before you can change a skillset you must disable the skillset and wait until there are no calls in the skillset. You cannot change a skillset while it is in use.

To set up or change a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.

Skillset List										
Skillset	Name	CDN	Status	Commands						
1	Documentation	223	Enabled	Properties	Agents	Day	Night	ServiceMode	Overflow	Disable
2	Testing	224	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable
3	Alt Lang Testing	225	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable
4	Calgary	226	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable
5	Ottawa	227	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable
6	Santa Clara	228	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable
7	Vancouver	229	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable
8	unused	---	--	Configure						
9	unused	---	--	Configure						
10	unused	---	--	Configure						

- 4 If you want to set up a skillset, click the **Configure** link for the skillset you want to set up or
if you want to change a skillset, click the **Properties** link for the skillset you want to change.
The Skillset Properties page appears.

Skillset Properties

Skillset: 8

Control DN:

Name:

MWI DN: (optional)

Method:

Break Time: (mm:ss)

Delay Answer: (mm:ss)

Attendant Ext: (optional)

Prompt Language:

- 5 In the **Control DN** box, type the extension for the skillset.
For more information, refer to “[Control DN](#)” on page 38.

- 6 In the **Name** box type the name for this skillset. The skillset name can be a maximum of 16 characters.
- 7 In the **MWI DN** box, type the extension of the telephone that you want to display the Message Waiting Indicator for the Skillset Mailbox.
- 8 From the **Method** list box, select Least Busy or Preferred.
The default is Least Busy.
- 9 In the **Break Time** box enter the Break Time period.
The default Break Time is 00:30.
- 10 In the **Delay Answer** box enter the delay answer time.
The default delay answer time is 00:00.
- 11 If you want to assign an attendant to the skillset, in the **Attendant Ext** box type the extension of the attendant.
- 12 If your system is configured for bilingual operation, from the **Prompt Language** list box, select Primary or Alternate. The Prompt Language list box does not appear if you do not use bilingual operation. For more information on bilingual operation refer to [“Assigning the Call Center language” on page 153](#).
- 13 Click the **Submit** button.
A message appears that says a new mailbox is created, and that you must initialize it before you enable the skillset. For how to initialize a mailbox refer to [“Initializing a skillset mailbox” on page 59](#).
- 14 Click the **OK** button.

Setting up DID routing

You can route calls based on their Direct Inward Dialing (DID) number. DID is the ability to make a telephone call directly into an internal extension, without having to go through the operator.

To route DID calls, set up a DID target line and assign the target line to a skillset.

To set up DID routing for Business Communications Manager 3.0

- 1 In Unified Manager, set up a DID target line.
For information about setting up a DID target line refer to the *Business Communications Manager 3.0 Programming Operations Guide*.
- 2 In CallPilot Manager, configure the target line number to be answered by Call Center.
For information about configuring lines refer to [“Configuring lines” on page 149](#).

To set up DID routing for CallPilot 150

- 1 From a Norstar phone, set up a DID target line.
For information about setting up a DID target line refer to the *Norstar System Coordinator Guide*.
- 2 In CallPilot Manager, configure the target line number to be answered by Call Center.
For information about configuring lines refer to [“Configuring lines” on page 149](#).

Setting up CLID/DNIS Routing

If you use Professional Call Center you can set up CLID/DNIS Routing Tables. CLID/DNIS Routing is the initial routing that Call Center calls encounter. The CLID/DNIS Routing you set up lets Call Center route calls quickly based on their incoming line number. Callers are routed to skillsets depending on who the caller calls, the line the call comes in on, or where the caller is calling from.

Examples of using CLID/DNIS Routing

Routing using CLID/ANI

If your company has preferred customers or customers who have access to special services, you can set up CLID/ANI routing that recognizes the phone numbers the customers are calling from. Customers whose phone numbers are recognized are immediately routed to appropriate skillsets. The callers do not need to enter additional digits to route their calls.

Routing using DNIS

If your company has a customer who is a purchasing agent who frequently contacts a sales line, you can set up DNIS routing that recognizes the phone number the customer is calling. Customers who call the sales directory numbers are immediately routed to sales skillsets.

Routing using Voice Button

If your company has Multimedia Call Center enabled, callers can click a voice button html icon and enter the phone number they want an agent to call them at. Calls that arrive from a voice button call are recognized as Multimedia Call Center calls and routed to the appropriate skillsets. You can set up CLID/ANI rules for Multimedia Call Center Calls. The phone number that the caller enters in the web browser is the phone number that Multimedia Call Center dials when an agent receives the call.

Routing using a Line

If your company uses a rotary number without DNIS capability that uses lines 1 to 3, you can set up routing to send calls that come in on these lines to a specific skillset.

Routing using CLID and a Line

If your company uses a rotary number and subscribes to a CLID service, you can set up routing based on CLID and Line to route a special customer.

Routing using CLID/ANI and DNIS

If your company has customers who call the sales group or the service group frequently, you can set up routing based on CLID/ANI and DNIS to quickly route these customers. You can route the customers to a skillset with agents that specialize in service or sales to these customers.

CLID/DNIS Routing Table properties

Line	<p>The line is the line number the call comes in on. Any calls that arrive on this line are assigned the routing you select.</p> <p>The line number you enter must be a line that is configured to be answered by a skillset.</p>
CLID/ANI	<p>The CLID (Calling Line Identification) or ANI (Automatic Number Identification) number identifies the caller or the location the call was made from.</p> <p>Any calls that have this CLID or ANI number are assigned the priority from 1-20 that you select.</p> <p>If a call matches the CLID/ANI information in the routing table, the call is routed to the skillset you choose. You can change the priority, from 1-20, of the call in the skillset that is assigned for the line the call comes in on.</p>
DNIS	<p>DNIS (Dialed Number Identification Service) sends a call directly to an internal extension without going through the operator. A DNIS number identifies the number the call is made to.</p> <p>If a call matches the DNIS information in the routing table, the call is routed to the skillset you choose. You can change the priority of the call in the skillset that is assigned for the line the call comes in on.</p>
Voice Button	<p>Select the Voice Button check box if you want Multimedia Call Center calls assigned to this route. You must use Business Communications Manager 3.0 and have Multimedia Call Center enabled.</p> <p>Incoming Multimedia Call Center calls are assigned the Priority you select.</p> <p>If you select the Voice Button check box, you must leave the Line box and the DNIS box blank.</p>
Action	<p>The action is the treatment that is applied to the call:</p> <ul style="list-style-type: none"> • You can move the call to another skillset • You can change the priority of the call from 1-20 • You can move the call to another skillset and change the priority of the call



Note: The CLID routing table can support 200 rules.

Each rule can be a number, or a range, such as 416*.

Adding a CLID/DNIS Route

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **CLID/DNIS Routing Table** link.
The Intelligent CLID/DNIS Routing page appears.

Intelligent CLID/DNIS Routing				
Line	CLID/ANI	DNIS	Action	Commands
-	4021		Priority 1	Insert Change Delete
-	4053		Skillset 3	Insert Change Delete
Voice Button			Skillset 2	Insert Change Delete
Voice Button	4033		Skillset 1	Insert Change Delete
End				Insert

- 4 Click the **Insert** link.
The CLID/DNIS Setup page appears.

CLID/DNIS Setup	
Line:	<input type="text"/>
CLID/ANI:	<input type="text"/>
DNIS:	<input type="text"/>
Voice Button:	<input type="checkbox"/>
Action:	
<input type="radio"/> Move to Skillset:	<input type="text" value="1"/>
<input type="radio"/> Change Call Priority Only	
New Call Priority:	<input type="text" value="No Change"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

- 5 Set the method to identify the call:
 - If you want to create a rule based on the line a call comes in on, in the **Line** box enter the line number.
 - If you want to create a CLID or ANI rule, in the **CLID/ANI** box type the CLID or ANI number you want to assign this routing to. The CLID or ANI number identifies the caller or the location the call was made from.
 - If you want to create a DNIS rule in the **DNIS** box type the DNIS number you want to assign to this route. The DNIS number identifies the number the call is made to.
 - If you want to create a rule for CLID/ANI and a rotary number, in the **CLID/ANI** box type the CLID or ANI number and in the **Line** box type the line number
 - If you want to create a rule for CLID/ANI and DNIS, in the **CLID/ANI** box type the CLID or ANI number and in the **DNIS** box type the DNIS number

- If you have Multimedia Call Center enabled and you want to assign routing to Multimedia Call Center calls, select the **Voice Button** check box. If you select the Voice Button check box, you can enter a CLID/ANI number, but you must leave the Line box and the DNIS box blank.
- 6 Select the type of routing you want to apply to the call:
 - if you want to move the call to another skillset, select **Move to Skillset** and from the **Skillset** list box select the number of the skillset you want to route the call to
 - if you want to move the call to another skillset and assign it a different priority:
 - select **Move to Skillset**
 - from the **Skillset** list box select the number of the skillset you want to route the call to
 - from the **New Call Priority** list box select a priority from 1-20 for the call
 - if you want to change the priority of the call, select **Change Call Priority Only** and from the **New Call Priority** list box select a priority from 1-20 for the call
 - 7 Click the **Submit** button.

Changing a CLID/DNIS Route

You can change the type of routing that applies to a CLID/DNIS call. If you want to change the type of call the routing applies to, you must create a new route in the CLID/DNIS Routing Table.

To change a CLID/DNIS Route

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **CLID/DNIS Routing Table** link.
The Intelligent CLID/DNIS Routing page appears.
- 4 Click the **Change** link for the route you want to change.
The CLID/DNIS Setup page appears for the route.
- 5 Select the type of routing you want to apply to the call:
 - If you want to move the call to another skillset, select **Move to Skillset** and from the **Skillset** list box select the number of the skillset you want to route the call to.
 - If you want to move the call to another skillset and assign it a different priority:
 - Select **Move to Skillset**.
 - From the **Skillset** list box select the number of the skillset you want to route the call to.
 - From the **New Call Priority** list box select a priority from 1-20 for the call.
 - If you want to change the priority of the call, select **Change Call Priority Only**, and from the **New Call Priority** list box select a priority from 1-20 for the call.
- 6 Click the **Submit** button.

Deleting a CLID/DNIS Route

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **CLID/DNIS Routing Table** link.
The Intelligent CLID/DNIS Routing page appears.
- 4 Click the **Delete** link for the route you want to delete.
The routing is removed from the CLID/DNIS Routing Table.

Assigning an agent to a skillset

You can assign an agent to one or more skillsets. Each agent is responsible for answering calls for the skillsets they are assigned to.

Dynamic Agent Priority

If you use Call Center Professional on Business Communications Manager 3.0, agents can have different priorities depending upon which skillset they are logged on to. For example, when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English. The same agent can have a priority of 3 when they are logged on to the Spanish skillset and, a priority of 6 when they are logged on to the German skillset.

If the method of call distribution for the skillset is Preferred, the agent with the highest priority receives the call. The agent priority ranges from 1 to 20. 1 is the highest agent priority for the most qualified agents. The default value is 10. For more information about method of call distribution refer to [“Method” on page 40](#).

To assign an agent to a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.

Skillset List										
Skillset	Name	CDN	Status	Commands						
1	Documentation	223	Enabled	Properties	Agents	Day	Night	ServiceMode	Overflow	Disable
2	Testing	224	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
3	Alt Lang Testing	225	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
4	Calgary	226	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
5	Ottawa	227	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
6	Santa Clara	228	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
7	Vancouver	229	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
8	unused	---	--	Configure						
9	unused	---	--	Configure						
10	unused	---	--	Configure						

- 4 Click the **Agents** link for the skillset that you want to add agents to.
The skillset must be configured before the Agents link appears.
The Assigned Agents page appears.

- 5 Click the **Assign** button.
The Assign Agents page appears with the available agents displayed.

Assign Agents

Skillset 7

Assign	ID	Name
<input type="checkbox"/>	1	R Munro
<input type="checkbox"/>	2	C Jacksen
<input type="checkbox"/>	3	G Dresser

Priority: 10

Submit **Cancel**

- 6 Click the **Assign** check box for each agent that you want to add to the skillset.
- 7 If you use Professional Call Center, from the **Priority** list box, select the Priority of the agent. 1 is the highest priority.
- 8 Click the **Submit** button.
The agent you selected appears on to the Assigned Agents page.
If you want to assign another agent to this skillset, follow steps 5 through 8.
- 9 Click the **Close** button to return to the Skillset List page.

Changing an agent's priority in a skillset

If you use Call Center Professional on Business Communications Manager 3.0, agents can have different priorities depending upon which skillset they are logged on to. For example, when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English. The same agent can have a priority of 3 when they are logged on to the Spanish skillset and, a priority of 6 when they are logged on to the German skillset.

To change an agent's priority in a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Agents** link for the skillset you want to change the agent priority of.
The Assigned Agents page appears.
- 5 Click the **Change** button.
The Change Agent Priorities page appears.
- 6 Click the **Change** check box for the agent whose priority you want to change.
You can select more than one agent if you want to assign them the same priority.
- 7 From the **Priority** list box select the priority you want to assign.
- 8 Click the **Submit** button.
The Assigned Agents page shows the new priority.
Repeat steps 5 through 8 for each agent you want to change.



Note: If you change the dynamic priority of an agent who is logged on, the agent must log off and log on again for the change to take effect.

Unassigning an agent from a skillset

When you unassign an agent from a skillset, the agent is removed from the skillset but is not deleted from Call Center.

If you want to delete an agent from Call Center, refer to [“Deleting an agent” on page 34](#).

If you want to log an agent off, refer to [“Logging an agent off” on page 35](#).

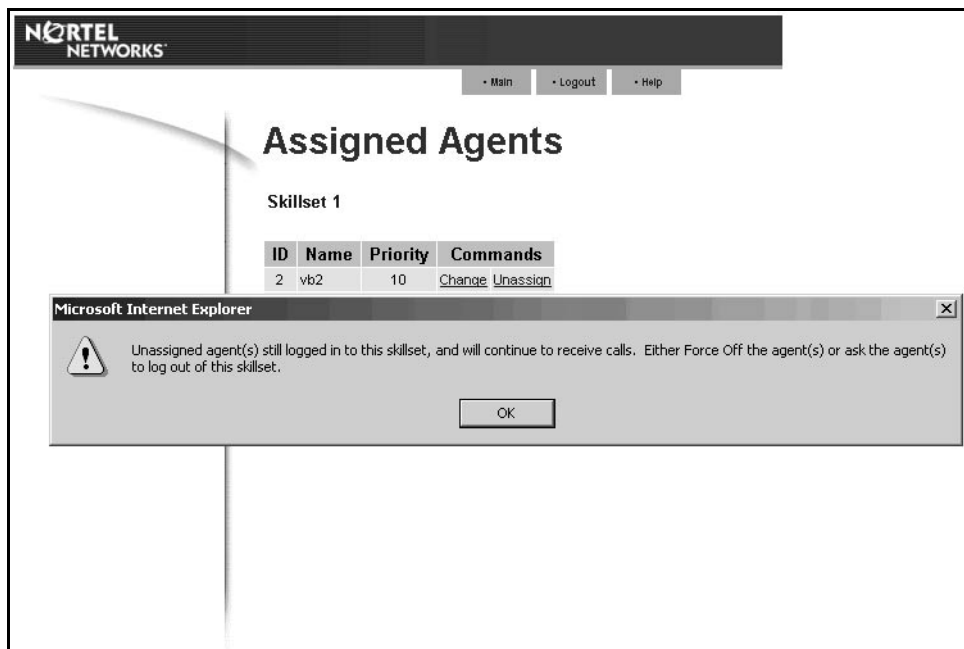
To unassign an agent from a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Agents** link for the skillset you want to unassign an agent from.
The Assigned Agents page appears.
- 5 Click the **Unassign** link for the agent you want to remove.
A message appears that asks you to confirm your request to unassign the agent.



Note: If the agent you are unassigning is logged on, a message appears that says the agent is logged on and asks you to force the agent off or ask them to log off.

To unassign the agent, click the OK button.



- 6 Click the **OK** button.
The agent is removed from the Assigned Agents page.
- 7 Click the **Close** button to return to the Skillset List page.

Viewing agents in a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Agents** link for the skillset you want to view.
The agents who are assigned to the skillset appear on the Assigned Agents page.
- 5 Click the **Close** button to return to the Skillset List page.



Note: For information about monitoring agents and skillsets, refer to [“Monitoring Call Center call activity”](#) on page 163.

Enabling a skillset

After you set up a skillset, the skillset is disabled until you enable it.

Before you can enable a skillset you must:

- set up the skillset with a valid Control DN.
For information, refer to [“Setting up or changing a skillset” on page 41](#).
- initialize the skillset mailbox.
For information, refer to [“Initializing a skillset mailbox” on page 59](#).
- record skillset mailbox greetings.
For information, refer to [“Recording skillset mailbox greetings” on page 64](#).
- set up the Day and Night Routing Tables.
For information, refer to [“Example of a Day Routing Table” on page 135](#).

To enable a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Enable** link for the skillset to you want to enable.
On the Skillset List page in the Status column the skillset changes from Disabled to Enabled.
A message appears that says what Service Mode the skillset is in.



Note: After you enable a skillset it is automatically in 24 hour mode. To change the Service Mode of a skillset, refer to [“Setting the Service Mode for skillsets” on page 133](#).

Disabling a skillset

You must disable a skillset if you want to change the skillset properties or administer the lines.

If you disable a skillset, no new calls go to the skillset. Any calls that are in the skillset get distributed until the calls are ended.

To disable a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Disable** link for the skillset you want to disable.
A message appears that asks you to confirm the request to disable the skillset.
- 5 Click the **OK** button.
On the Skillset List page in the Status column the skillset changes from Enabled to Disabled.

Unconfiguring a skillset

You must disable a skillset if you want to change the skillset properties or administer the lines. Before you unconfigure a skillset, unassign any lines that are assigned to it by following the procedure “[Configuring lines](#)” on page 149.

You must disable a skillset before you can unconfigure it.



Warning: If you unconfigure a skillset, you delete the skillset properties and the programming for the skillset. This includes the general properties, the assigned agents and the routing table information.

To unconfigure a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Unconfigure** link for the skillset you want to unconfigure.
A message appears that asks you to confirm the request to unconfigure the skillset.
- 5 Click the **OK** button.
The programming for the skillset is removed from the Skillset List page.

Chapter 6

Setting up skillset mailboxes

About skillset mailboxes

Each skillset has a mailbox that stores messages left by callers. A skillset mailbox is created automatically when you set up a skillset. There is one skillset mailbox for each skillset. The skillset mailbox number is the same as the Control Directory Number (CDN) of the skillset.

Skillset mailboxes have these Class of Service settings:

- they use the primary prompt language
- their maximum message time is 15 minutes
- their maximum message length is three minutes
- their maximum message retention is 30 days
- they have a maximum greeting length of one minute

The default Class of Service for skillset mailboxes is 1.

To prepare a skillset mailbox to receive messages:

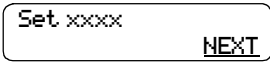
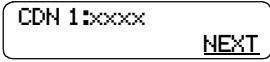
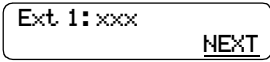
- know the skillset mailbox number (CDN) of each skillset mailbox.
If you do not know the skillset mailbox number, refer to [“Determining a skillset mailbox number” on page 58](#)
- initialize the skillset mailbox
- record the skillset mailbox greetings

You can use the table [“Skillset mailboxes” on page 187](#) to record the skillset mailboxes you set up.

Determining a skillset mailbox number

You must know a skillset mailbox number before you can set up the skillset mailbox. The skillset mailbox number is the mailbox's Control DN. If you know the skillset mailbox number, you can initialize the mailbox. Refer to [“Initializing a skillset mailbox” on page 59](#).

To determine a skillset's mailbox number and Message Waiting Indication telephone

- 1 Press **[e] 9 8 5**.
- 2 Press **NEXT**.

- 3 The skillset mailbox number for skillset 1 is displayed.
If **None** appears the skillset is not configured.
Press **NEXT** to continue.

- 4 The Message Waiting Indication (MWI) extension is displayed.
If there are messages in the skillset 1 mailbox, MWI appears at this extension. You assign the MWI extension when you set up the skillset. If **Unavail** appears you have not set up an MWI extension.

- 5 Press next to view the skillset mailbox number and MWI extension for each skillset.
- 6 Press **[end call]** to end the session.

Initializing a skillset mailbox

You must initialize a skillset mailbox before you can retrieve or listen to messages that are left in it.

Choose a password for the skillset mailbox that is between four to eight digits long and does not start with zero. Give the skillset mailbox passwords to the agents who are responsible for retrieving messages.

Initializing a skillset mailbox involves:

- choosing a password from four to eight digits long that does not start with zero
- changing the skillset mailbox default password to the new password
- recording the skillset mailbox name in the Company Directory

To initialize a skillset mailbox

- 1 Press 9 8 1 .
- 2 Log on by following the voice prompts.
Use the skillset mailbox number and , the default password.
- 3 This display appears briefly to indicate that you must change the password.

Must change Pswd
- 4 Enter a new skillset mailbox password from four to eight digits long that does not start with zero.
Press OK or .

Pswd:
RETRY OK
- 5 Reenter the skillset mailbox password and press OK or .

Again:
RETRY OK
- 6 At the tone, record the skillset mailbox name in the Company Directory. Do not use handsfree.
Include the skillset mailbox number in the recording. For example, “Sales, mailbox 5813.”
Press OK or to end the recording.

Record name:
RETRY OK
- 7 Press OK or to accept the recording
or
press PLAY or to listen to the recording
or
press RETRY or to re-record your name.

Accept name?
RETRY PLAY OK
- 8 The recorded name plays and the skillset mailbox name is displayed.
The skillset mailbox name is the name you entered when you set up the skillset properties.

<Skillset name>
- 9 Press to end the session.

Opening a skillset mailbox

You can open an initialized skillset mailbox from:

- your extension
- another extension
- an outside tone dial telephone

To open a skillset mailbox - Norstar Voice Mail

1 Press .

Pswd:
OTHR RETRY OK

2 Enter the skillset mailbox password and press or
or
if you are at another extension, or if you are using a Guest mailbox, press or to display the **LOG:** prompt. When this prompt appears, enter the skillset mailbox number and password.

1 new 1 saved
PLAY REC ADMIN

3 After you open the skillset mailbox, the telephone display shows how many new and saved messages are in the mailbox.

To open a skillset mailbox - CallPilot

1 Press .

Mbox:
RETRY

2 Press
or
if you are at another extension, enter the skillset mailbox number and then press or .

Pswd:
RETRY

3 Enter the skillset mailbox password and press or .

Opening a skillset mailbox remotely

To open a skillset mailbox from an outside telephone

- If a skillset mailbox is a Mailbox node in a CCR Tree, press the one digit number and you automatically transfer to the skillset mailbox
or
- Call an Operator, receptionist or subscriber and ask them to transfer you to the skillset mailbox number using **☎ 9 8 6**
- After you reach the skillset mailbox, press *** *** during the greeting to open the skillset mailbox. If you are in Europe or Australia press **8 8**.
- At the voice prompt, enter the skillset mailbox number and password and press **#**. Follow the voice prompts.

To open a skillset mailbox directly from an outside telephone

Follow either procedure to open a skillset mailbox remotely.

- 1 Call a telephone line that is answered by the Automated Attendant.
- 2 Press *** *** during the Automated Attendant Menu prompt.
If you are in Europe or Australia press **8 8**.
- 3 Enter the skillset mailbox number and password, and then press **#**.
- 4 Follow the voice prompts.

or

- 1 Call your own extension number.
- 2 Press *** *** during your personal greeting.
If you are in Europe or Australia press **8 8**.
- 3 Enter the skillset mailbox number and password, and then press **#**.
- 4 Follow the voice prompts.

Skillset mailbox password





To decrease the chances of unauthorized access to a skillset mailbox, change its password every 30 days.

Keep a written copy of the skillset mailbox passwords in [“Skillset mailboxes” on page 187](#). Give the skillset mailbox passwords only to the agents who retrieve messages at your call center. For security reasons, choose an uncommon password, not a predictable password like 1234 or 1111. If someone knows a skillset mailbox password, they can access the skillset mailbox and play or delete messages. They can also access CallPilot and use it fraudulently or disrupt service.



Changing a skillset mailbox password

You can change a skillset mailbox password at any time. A password must be from four to eight digits long and cannot start with zero.



To change a skillset mailbox password


- 1 Press     .
Follow the voice prompts or the display buttons to open the skillset mailbox.


<Skillset name>


- 2 The skillset mailbox name appears briefly and the recorded name plays.
- 3 If you use the CallPilot interface:
 - Press   to open the Mailbox Password menu
 - Go to step 4


If you use the Norstar Voice Mail interface:

- Press **ADMIN** or 
- Press **PSWD** or 
- Go to step 4

Pswd:
RETRY 

- 4 Enter your new mailbox password and press **OK** or  .

Again:
RETRY 

- 5 Re-enter your new mailbox password and press **OK** or  .

Password OK

- 6 This display appears briefly.

- 7 Press  to end the session.

Resetting a skillset mailbox password



Note: Reset a password only if the agent who accesses the skillset mailbox forgets the password or is “locked-out”. The password for the reset mailbox is 0000. The agent who accesses the skillset mailbox cannot retrieve skillset mailbox messages until they create a new password. Tell the agent to change the default password as soon as possible. While the skillset mailbox has the default password, the mailbox is vulnerable to unauthorized access.

To reset a skillset mailbox password

- 1 Start CallPilot Manager.
- 2 Click the **Mailbox Administration** heading.
The Mailbox List page appears.
- 3 Click the **Reset Password** link for the skillset mailbox you want to reset the password for.
A message appears that asks you to confirm your request to change the password.
- 4 Click the **OK** button.
The password is reset to 0000, the default password.

Recording skillset mailbox greetings

After you initialize a skillset mailbox, record the greetings for it.

You can record Primary, Alternate and Personalized greetings for each skillset mailbox. You record a Primary skillset mailbox greeting for everyday use. The Alternate skillset mailbox greeting is an optional greeting you can record for special circumstances. If your call center subscribes to Caller ID, you can record Personalized skillset mailbox greetings.

If you record Primary and Alternate skillset mailbox greetings, you must choose which greeting plays to callers who reach the skillset mailbox.

You can also record greetings in an Alternate Language. Callers can press **9** while the greeting is playing to listen to the voice prompts in the Alternate Language. Remember to inform callers in the Primary skillset mailbox greeting that they can press **9** to hear the Alternate Language.

The skillset mailbox must use the Norstar Voicemail interface for callers to be able to press **9** to hear the Alternate language. Callers cannot select an alternate language if the skillset mailbox uses the CallPilot interface.

If the Operator Status is set to Yes, and a caller presses **0** during the skillset mailbox greeting, the caller transfers to the receptionist or Operator. For information about Operator Status, refer to the *CallPilot Manager Set Up and Operation Guide*. Inform callers in the skillset mailbox greetings that they can press **0** to speak to the receptionist or Operator.

If the Operator Status is set to No, a caller who presses **0** during the skillset mailbox greeting is informed the Operator is not available, and is transferred to the skillset mailbox.

Examples of Primary and Alternate greetings

You must record a Primary greeting for each skillset mailbox. In the Primary greeting include the skillset mailbox name that is listed in the Company Directory. For example:

“Hello. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, phone number and a brief message. One of our agents will return your call as soon as possible. Thank you.”

You can record an Alternate greeting for each skillset mailbox. Use an Alternate greeting for special circumstances. In the Alternate skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory.

For example:

“Season’s Greetings! You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your name, phone number and a brief message. One of our agents will return your call when we re-open on December 27. Thank you.”

To record a Primary or Alternate skillset mailbox greeting

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.
- 2 The skillset mailbox name appears briefly.

<Skillset name>
- 3 If you use the CallPilot interface:
 - Press **[8] 2** to open the Greetings Options menu
 - Go to step 4
 If you use the Norstar Voice Mail interface:
 - Press **ADMIN** or **[8]**
 - Press **GREET** or **[2]**
 - Go to step 4
- 4 Press **REC** or **[1]**.

Greeting options
 REC CHOOSE CFWD
- 5 Press **PRIME** or **[1]** to record the Primary greeting or press **ALT** or **[2]** to record the Alternate greeting. If you are changing a greeting, the current greeting starts to play.

Greeting:
 PRIME ALT PERS
- 6 If this is the first time you are recording a greeting, this display appears briefly.

Not recorded
- 7 Press **YES** or **[1]** and record your greeting at the tone.

Record now?
 YES NO QUIT
- 8 Press **OK** or **#** to end the recording.

Record greeting:
 RETRY OK
- 9 Press **OK** or **#** to accept the recording or press **PLAY** or **[1]** to listen to the greeting or press **RETRY** or **[2]** to rerecord the greeting.

Accept greeting?
 RETRY PLAY OK
- 10 Press **[*]** to end the session.

Choosing a Primary or Alternate skillset mailbox greeting

If you record a Primary and an Alternate skillset mailbox greeting, you must choose which greeting plays. You can change the selection at any time and as often as needed. If you do not choose a greeting, the Primary skillset mailbox greeting plays.

If you choose the Alternate mailbox greeting, you must set whether the mailbox accepts messages. If you choose Yes the skillset mailbox receives messages in the normal way.

If you choose No:

- messages cannot be left in the skillset mailbox
- the Alternate mailbox greeting takes precedence over all other greetings
- if a caller presses a button to fast forward the message, they hear a voice prompt that says this is a special greeting
- if a caller presses a button to send a fax, the fax goes to the General Delivery Mailbox, not the skillset mailbox.

If you choose the Alternate mailbox greeting, remember to change back to the Primary mailbox greeting at the appropriate time.

To choose a Primary or Alternate skillset mailbox greeting

- 1 Press **[*] 9 8 1**.

Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

<Skillset name>

- 2 The skillset mailbox name appears briefly.

- 3 If you use the CallPilot interface:

- Press **[8] [2]** to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **GREET** or **[2]**
- Go to step 4

Greeting options
REC CHOOSE CFWD

- 4 Press **CHOOSE** or **[2]** to select a greeting.

Use greeting:
PRIME ALT QUIT

- 5 Press **PRIME** or **[1]** to select the Primary mailbox greeting and go to step 7
or
press **ALT** or **[2]** to select the Alternate mailbox greeting and go to step 6.

Accept msgs:Y
CHNG OK

- 6** If you choose the Alternate mailbox greeting, you are asked whether the mailbox can accept messages. Press **CHNG** or **1** to toggle from yes to no or press **OK** or **#** to accept.
- 7** Press **END** to end the session.

Recording a Personalized skillset mailbox greeting

If your call center subscribes to Caller ID, you can record a maximum of three Personalized greetings for each skillset mailbox. For Personalized skillset mailbox greetings, you program Call Center to recognize a specific telephone number. The Personalized skillset mailbox greeting plays only for a call from the specific telephone number.

If you record a Personalized greeting, program the skillset mailbox to receive messages and choose an Alternate mailbox greeting, the Personalized greeting takes precedence over any other greetings. If you program the skillset mailbox not to receive messages and choose an Alternate mailbox greeting, the Alternate mailbox greeting takes precedence over any other greeting, including Personalized mailbox greetings.

In the Personalized skillset mailbox greeting include the skillset mailbox name that is listed in the Company Directory. For example:

“Hi John. You have reached the Sales Department at Bridgestone Computers. At the sound of the tone, please leave your order. One of our agents will return your call if you need to speak to someone directly. Thank you.”

To record a Personalized skillset mailbox greeting

- 1 Press **☎** **9** **8** **1**.

Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.

<Skillset name>

- 2 The skillset mailbox name appears briefly.

- 3 If you use the CallPilot interface:

- Press **8** **2** to open the Greetings Options menu
- Go to step 4

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **GREET** or **2**
- Go to step 4

Greeting options
REC CHOOSE CFWD

- 4 Press **REC** or **1**.

Greeting:
PRIME ALT PERS

- 5 Press **PERS** or **3** to record a Personalized greeting.

Greeting:
RETRY OK

- 6 Enter a Personalized greeting number of 1, 2 or 3.

Ph:
CHNG OK

- 7 Press **CHNG** or **1**.

- Ph:
RETRY OK
- Record Greeting:
RETRY OK
- Accept Greeting?
RETRY PLAY OK
- 8 Enter the phone number (maximum 10 digits) that you are assigning the Personalized mailbox greeting to. Press **OK** or **#** to accept the phone number.
 - 9 Lift your handset. At the tone, record your greeting. Press **OK** or **#** to end the recording.
 - 10 Press **OK** or **#** to accept the greeting, or press **PLAY** or **1** to listen to the greeting or press **RETRY** or **2** to re-record the greeting.
 - 11 Press **☎** to end the session.

Deleting a Personalized skillset mailbox greeting

If you no longer need a Personalized mailbox greeting, you can delete it.

To delete a Personalized mailbox greeting

- 1 Press **☎ 9 8 1**. Follow the voice prompts or the display button options on your telephone, to open the skillset mailbox.
 - 2 If you use the CallPilot interface:
 - Press **8 2** to open the Greetings Options menu
 - Go to step 3
 If you use the Norstar Voice Mail interface:
 - Press **ADMIN** or **8**
 - Press **GREET** or **2**
 - Go to step 3
 - 3 Press **REC** or **1**.
 - 4 Press **PERS** or **3** to choose a Personalized mailbox greeting.
 - 5 Enter the Personalized greeting number (1, 2, or 3) that you want to delete.
 - 6 Press **DEL** or **2** to delete the greeting.
 - 7 Press **☎** to end the session.
- Greeting options
REC CHOOSE CFWD
- Greeting:
PRIME ALT PERS
- Greeting:
RETRY OK
- Ph: XXXXXXXX
CHNG DEL OK

Checking skillset mailboxes for messages

Frequently check the skillset mailboxes for messages. Only one agent can retrieve messages from each skillset mailbox at a time.

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 pass the message on to another agent.

If the agent who listens to the message erases the message after writing down what it says:

- the next agent does not waste time listening to the same message
- the next agent knows if the callback was successful or not
- only one agent contacts the caller

If only one agent is responsible for retrieving 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 skillset mailbox messages

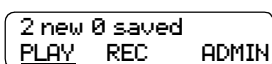
Use the procedure for playing messages that corresponds to the interface you use:

- “To play skillset mailbox messages - Norstar Voice Mail” on page 71
- “To play skillset mailbox messages - CallPilot” on page 73

To play skillset mailbox messages - Norstar Voice Mail

Use this procedure if you use the Norstar Voice Mail interface.

- 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 to listen to your messages. For other options, refer to the table “Playing skillset mailbox messages - Norstar Voice Mail” on page 71.
- 3 Press to end the session.



The table “Playing skillset mailbox messages - Norstar Voice Mail” shows the message options available to you during and after playing messages.

Playing skillset mailbox messages - Norstar Voice Mail				
Option	Button	Available while playing	Available after playing	Description
Back up	or <<<	✓		Rewinds the message nine seconds and resumes playing it.
Copy	or COPY	✓	✓	Sends a copy of the message to one or more mailboxes. If you record an introduction, it must be longer than three seconds.
End of Message	or >>> >>>	✓		Goes to the end of the message.
Envelope		✓	✓	Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender.
Erase	or ERASE	✓	✓	Deletes the message currently playing. If no messages are playing, deletes the last message played. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes 1 and 2 on page 72.)

Playing skillset mailbox messages - Norstar Voice Mail				
Option	Button	Available while playing	Available after playing	Description
Forward	[3] or >>>	✓		Advances the message nine seconds and continues playing from that point. A message can be forwarded as many times as required.
Next	[6] or [#] [#]	✓	✓	Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox.
Pause/Continue	[2] or <u>STOP</u> / <u>PLAY</u>	✓		Temporarily stops a message. When you stop the message, you can play the previous message, continue playing the current message, or skip to the next message.
Previous	[4]	✓	✓	Stops playing the current message and plays the previous message.
Quit	[*]		✓	Stops playing the message and plays the Mailbox main menu options.
Replay	[1] [1] or <<< <<<	✓		Replays the message from the beginning.
Replay	[1]		✓	Replays the last message.
Reply	[9] or <u>REPLY</u>	✓	✓	Replies to a message. (Refer to Note 3 on page 73) The reply can be either: - a message to an internal sender's mailbox - a telephone call to an internal or external party (Refer to Note 4 on page 73 .)
Save Message	[7] [7] or <u>SAVE</u>	✓		Saves the message being played. (If you do not delete a message, it is automatically saved). This option is not shown on the display unless you erase a message. If you erase a message and play the message again, you can press <u>SAVE</u> on a two line display telephone. (Refer to Note 2 on page 72 .)
Volume Control	[*]	✓		Adjusts the volume of the message that is playing. The volume increases each time you press [*]. After four presses, the volume returns to the lowest level.

Notes:

- 1 Because the skillset mailbox has limited message storage space, delete any messages you no longer need. After a certain time period, your saved messages are erased automatically. Ask your System Administrator about this.
- 2 You can retrieve a deleted message only if you have not quit the session in which you deleted it. For information about retrieving deleted messages refer to [“Retrieving erased messages” on page 74](#)”.

- 3 Applies only if the Reply feature is enabled.
- 4 You can reply to an outside caller by dialing them back if your company subscribes to Caller ID (CLID) service. For further information about replying to an outside caller refer to [“Replying to an external caller” on page 77](#).

To play skillset mailbox messages - CallPilot

Use this procedure if you use the CallPilot interface.

- 1 Press **[*] [9] [8] [1]**.
Follow the voice prompts or the display button options to open the skillset mailbox.

A voice prompt announces the number of new and saved messages that you have.

No messages		
COMP	MBOX	EXIT

- 2 You can play any message that you want to listen to.
Press **[2]** to play the current message.
For other message commands, refer to the table [“Playing skillset mailbox messages - CallPilot”](#).
- 3 Press **[*]** to end the session.

The table [“Playing skillset mailbox messages - CallPilot”](#) shows the message options that are available to you during and after playing messages.

Playing skillset mailbox messages - CallPilot			
Option	Button	Available during and after playing	Description
Skip Back	[1]		Rewinds the message five seconds and resumes playing it at that point.
Skip Forward	[3]		Advances the message five seconds and continues playing from that point.
Previous Message	[4]		Stops playing the current message and plays the previous message.
Next Message	[6]		Plays the next message in the skillset mailbox. If you use this while a message is playing, it stops playing the current message and plays the next message in the skillset mailbox.
Call Sender	[9]		Places a call to the sender of a message.
Help	[*]	✓	Offers a Help menu.
Reply	[7] [1]	✓	Replies to a message.

Playing skillset mailbox messages - CallPilot			
Option	Button	Available during and after playing	Description
Envelope	7 2	✓	Plays the information in the message envelope. Envelope information includes the date and time the message was sent and, if the message is internal, the directory name of the sender.
Forward Message	7 3	✓	Forwards the message to one or more mailboxes. You can record an introduction to the forwarded message.
Reply All	7 4	✓	Replies to a message and all recipients of the message. (Refer to Note 3 on page 73 .)
Delete	7 6	✓	Deletes the current message. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes 1 and 2 on page 72 .)

Retrieving erased messages

After you play your messages and end your skillset mailbox session, any messages that you do not erase are saved. Since message storage space is limited, we recommend that you erase messages that are no longer needed.

You can retrieve an erased message if you are still in the skillset mailbox session. An erased message remains in the skillset mailbox until you end the current session.

To retrieve an erased message - Norstar Voice Mail

After you erase a new or saved message, the number of new or saved messages shown on the display is decreased by one. Even though the display shows 0 new 0 saved, you can still play and retrieve any erased skillset mailbox messages. Press **PLAY** or 2 to listen to the erased message.

To retrieve an erased message - CallPilot

You can retrieve a deleted message. A deleted message remains in the skillset mailbox until you end the current session. Locate the deleted message. Then press 7 6 to restore the message.

After you play the erased message, you can restore it. If you end the current session without restoring the erased message, it is permanently erased from the skillset mailbox.

Replying to messages

You can reply to internal and external callers. You can reply to an external caller if your company subscribes to CLID.

The messages you record must be longer than three seconds. The system times out after five seconds of silence.

Use the procedure for replying to messages that applies to the interface you use:

- “To reply to an internal caller - Norstar Voice Mail” on page 75
- “To reply to an internal caller - CallPilot” on page 76

Replying to an internal caller

If you use	and you want to	use
Norstar Voice Mail	reply to the caller's extension	<u>CALL</u> to transfer to the internal caller's extension.
	leave a message in the caller's mailbox	<u>MSG</u> to record and send a reply to the internal caller's mailbox.
CallPilot	reply to the caller's extension	<u>Call Sender</u> 9 to transfer to the internal caller's extension.
	leave a message in the caller's mailbox	<u>Reply</u> 7 1 to record and send a reply to the internal caller's mailbox.

To reply to an internal caller - Norstar Voice Mail

- 1 Press **6** **9** **8** **1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

```
1 new 0 saved
PLAY REC ADMIN
```

- 2 Press PLAY or **2**.

```
End of message
REPLY ERASE NEXT
```

- 3 After you listen to the message, press REPLY or **9**.

```
Reply to msg
MSG CALL QUIT
```

- 4 Press CALL or **2** to call the caller
or
press MSG or **1** to record and send a reply.

To reply to an internal caller - CallPilot

- 1** Press
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.

- 2** A mailbox summary is announced.
While you are in your message list, you can play any message.

- 3** Press to play the current message.

- 4** Press to call the caller
or
press to record and send a reply.

Replying to an external caller

You can reply to an external caller if your company subscribes to a Caller ID service and the skillset mailbox has an outdial method assigned to it. For information about outdial method refer to [“Assigning an outdial method to a skillset mailbox” on page 80](#). Before you use the Reply option you must play the message.

Use the procedure that applies to the interface you use.

To reply to an external caller - Norstar Voice Mail

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

```
1 new 0 saved
PLAY REC ADMIN
```

- 2 Press **PLAY** or **[2]**.

```
End of message
REPLY ERASE NEXT
```

- 3 After you listen to the message, press **REPLY** or **[9]**.
CallPilot dials the external number directly.

To reply to an external caller - CallPilot

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.
- 2 A mailbox summary is announced.
While you are in the message list you can play any message.
- 3 Press **[2]** to play the current message.
- 4 Press **[9]** to call the caller.
CallPilot dials the external number directly.

Chapter 7

Off-premise Message Notification

About Off-premise Message Notification

Off-premise Message Notification notifies you or a designated agent when there are new or urgent messages in the skillset mailbox. You can receive Off-premise Message Notification at any tone dial telephone number, pager or extension.



Note: Set up Off-premise Message Notification for non-business hours. Then Off-Premise Message Notification does not consume a Reserved or voice channel during busy periods.

You can receive notification of a message at a maximum of five different destination numbers. When the number of retry attempts is reached for each destination number, the next number in the series is called. For example, Call Center can call your car phone first when there is a message in the skillset mailbox. If there is no answer, Call Center waits five minutes and calls your car phone again. If there is still no answer, Call Center calls your car phone a third time. If there is no answer after three calls, Call Center calls the your home phone. Call Center continues to call at five minute intervals until the call is answered or all of the destinations are called three times.

Off-premise Message Notification, the Retry Intervals and Maximum Number of Attempts for skillset mailboxes are assigned through the Class of Service settings in CallPilot Manager. Skillset mailboxes have a default Class of Service of 1.

Class of Service 1 has these default settings for Off-premise Message Notification:

- Off-premise Message Notification enabled
- a Retry Interval of five minutes
- a Maximum Number of Attempts of 3

For information about changing Class of Service settings, refer to the *CallPilot Manager Set Up and Operation Guide*.

You must assign start and stop times for phone and destinations. Off-premise Message Notification begins when the start time is reached. Set the start time for a time when you are at the destination number so that you are there to receive calls.

A person who receives a Off-premise Message Notification call can cancel Off-premise Message Notification to their destination number. This is useful if a destination is incorrectly programmed and a wrong party receives the calls.

The recipient of an Off-premise Message Notification call hears the following voice prompt: “Message for (name of mailbox owner). To log on press . If you have received this call by mistake, please press .

After you set the Off-premise Message Notification parameters, Off-premise Message Notification is enabled automatically.

Assigning an outdial method to a skillset mailbox

The outdial method determines which line, line pool or route code the system uses for Off-premise Message Notification.

The default for outdial method is None. You must assign an outdial method before you can use an external telephone or a pager as an Off-premise Message Notification destination.

For more information on line pools and route codes, refer to your system documentation.



Warning: Do not change the extension number assigned to the skillset mailbox. If this extension number is changed, callers in the skillset cannot access the skillset mailbox and you cannot change the Skillset general parameters.

To correct a wrong extension number, change the extension number to the Control DN of the skillset.

To assign an outdial method to a skillset mailbox

- 1 Start CallPilot Manager.
- 2 Click the **Mailbox Administration** heading.
The Mailbox List page appears.
- 3 Click the **Change** link for the skillset mailbox you want to set up an outdial route for.
The Mailbox page for the mailbox appears.
- 4 From the **Outdial Type** list box select the type of outdial method you want to use.
- 5 If you use a line or a line pool, in the **Line/Pool#** type the number of the outgoing line or line pool number you want to assign to the skillset mailbox for outdialing.
- 6 Click the **Submit** button.

Off-premise Message Notification parameters

You can set up the parameters for Off-premise Message Notification from any tone dial phone.

The parameters are:

- destination type (phone, extension or pager)
- destination number (phone, extension or pager)
- time range for receiving calls at phone numbers or extensions (Pagers are notified any time there is a qualifying message.)
- types of message you want to receive (all new messages or just urgent messages)



Note: The restrictions that apply to your phone line also apply to Off-premise Message Notification numbers. For example, if you cannot dial long distance phone numbers from your phone, you cannot have a long distance Off-premise Message Notification destination number.

Setting up Off-premise Message Notification

Follow these instructions if you have not set up Off-Premise Message Notification and are setting it up for the first time. If you have set up Off-Premise Message Notification, refer to the section on “[Changing Off-premise Message Notification](#)” on page 92.

To set up Off-premise Message Notification to	refer to
a phone number	page 82
an extension	page 85
a pager	page 87

To set up Off-premise Message Notification to a phone number

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:
 - Press **[8] [5]** to open the Mailbox Tools
 - Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
 - Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

Msg notify
ADMIN SELECT

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

Destination:
PHONE EXT PAGER

- 4 Press **PHONE** or **[1]** to choose a phone number destination.

Ph:
RETRY OK

- 5 Enter the destination phone number and press **OK** or **[#]**. The destination phone number is a maximum of 30 digits.

- 6** Press **OK** or **#** to accept the destination phone number represented by <x> or press **ADD** or **2** to add special characters and use your dialpad or follow the voice prompts to add characters.
- After you add special characters, press **OK** or **#** to accept the destination number.
- 7** Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.
- 8** Press **AM** or **1** or **PM** or **2**.
- 9** Press **OK** or **#** to accept the start time.
- 10** Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.
- 11** Press **AM** or **1** or **PM** or **2**.
- 12** Press **OK** or **#** to accept the stop time.
- 13** Press **YES** or **1** if you want to set up another destination number or press **NO** or **#** if you do not want to set up another destination number.
- 14** Press **NEXT** or **#** to accept the start time that you entered or press **CHNG** or **1** to change the start time.
- 15** Press **NEXT** or **#** to accept the stop time that you entered or press **CHNG** or **1** to change the stop time.

Msg type: new
CHNG OK

- 16** Press **OK** or **#** if you want to be notified when the skillset mailbox receives a new message
or
press **CHNG** or **1** if you want to be notified only when the skillset mailbox receives an urgent message.

Msg notify
ADMIN SELECT

- 17** Press **[End Call]** to end the session.

To set up Off-premise Message Notification to an extension

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Ms9 notify
ADMIN      SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Destination:
PHONE EXT  PAGER
```

- 4 Press **EXT** or **[2]** to choose an extension as the destination.

```
Ext:
RETRY      OK
```

- 5 Enter the destination number and press **OK** or **[#]**.

```
Accept:<x>
RETRY      OK
```

- 6 Press **OK** or **[#]** to accept the destination extension.
The <x> represents the extension.

```
Start hhmm:
RETRY      OK
```

- 7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by zero.

```
<start time>
RETRY  AM  PM
```

- 8 Press **AM** or **[1]**
or
PM or **[2]**.

```
<start time>
RETRY      OK
```

- 9 Press **OK** or **[#]** to accept the start time.

```
Stop hhmm:
RETRY      OK
```

- 10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single-digit hour and minute must be preceded by a zero.

<stop time>
 RETRY AM PM

11 Press AM or **1**
 or
PM or **2**.

<stop time>
 RETRY OK

12 Press OK or **#** to accept the stop time.

More dest?
 YES NO

13 Press YES or **1** if you want to set up another destination number
 or
 press NO or **#** if you do not want to set up another destination
 number.

Start:<start time>
 CHNG NEXT

14 Press NEXT or **#** to accept the start time that you entered
 or
 press CHNG or **1** to change the start time.


Stop:<stop time>
 CHNG NEXT

15 Press NEXT or **#** to accept the stop time that you entered
 or
 press CHNG or **1** to change the stop time.

Msg type: new
 CHNG OK

16 Press OK or **#** if you want to be notified when you the skillset
 mailbox receives a new message
 or
 press CHNG or **1** if you want to be notified only when the skillset
 mailbox receives an urgent message.

Msg notify
 ADMIN SELECT

17 Press  to end the session.

About setting up Off-premise Message Notification to a pager number

Example of a destination pager number

If you are assigning a pager destination number from behind a PBX, remember to insert a **9** (depending on your system) before the **#** to access an outside line.

There is a combined limit of 30 characters for the pager phone number and the pager message.

For example, to reach your pager, enter:

4 2 5 5 5 1 2 3 4 # 3

where:

- **#** specifies the next digits are special characters
- **4** recognizes dial tone
- **2** specifies that the next digits are the numbers to be dialed
- **5 5 5 1 2 3 4** is the pager phone number dialed
- **3** inserts a timed pause

Depending on the company supplying your paging service, the programming sequence can vary. For more information about setting the destination phone number parameters for your pager, contact your pager company.

To set up Off-premise Message Notification to a pager

- 1 Press *** 9 8 1**.


Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **8 5** to open the Mailbox Tools
- Press **NOTIF** or **2** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **8**
- Press **6** to open the Off-premise Message Notification menu
- Go to step 3

- | | |
|--|--|
| <pre>Ms9 notifu ADMIN SELECT</pre> | <p>3 Press <u>ADMIN</u> or 1 to set up Off-premise Message Notification.</p> |
| <pre>Destination: PHONE EXT <u>PAGER</u></pre> | <p>4 Press <u>PAGER</u> or 3 to select a pager number destination.</p> |
| <pre>Pager: RETRY <u>OK</u></pre> | <p>5 Enter the destination pager number and press <u>OK</u> or #.</p> |
| <pre><x> <u>ADD</u> <u>OK</u></pre> | <p>6 Press <u>OK</u> or # to accept the destination pager number represented by <x>
or
press <u>ADD</u> or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.</p> <p>After you add special characters, press <u>OK</u> or #.</p> |
| <pre>Show<xxxx> CHNG NEXT</pre> | <p>7 Press <u>NEXT</u> or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you
or
press <u>CHNG</u> or 1 to change the pager message.
The combined limit is 30 characters for the pager phone number and the pager message.</p> |
| <pre>More dest? YES NO</pre> | <p>8 Press <u>YES</u> or 1 if you want to set up another destination number
or
press <u>NO</u> or # if you do not want to set up another destination number.</p> |
| <pre>Ms9 type: new CHNG <u>OK</u></pre> | <p>9 Press <u>OK</u> or # to be notified when the skillset mailbox receives a new message
or
press <u>CHNG</u> or 1 to change the message type to be notified only when the skillset mailbox receives an urgent message.</p> |
| <pre>Ms9 notifu ADMIN SELECT</pre> | <p>10 Press  to end the session.</p> |

To set up Off-premise Message Notification to more than one destination

You can receive notification of a message at a maximum of five different destination numbers. The following steps show you how to enter a phone number destination and then add a pager destination for the first time.

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:
 - Press **[8] [5]** to open the Mailbox Tools
 - Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
 - Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Destination:
PHONE EXT PAGER
```

- 4 Press **PHONE** or **[1]** to choose a destination phone number.

```
Ph:
RETRY OK
```

- 5 Enter the destination phone number and press **OK** or **[#]**. The destination phone number cannot be longer than 30 digits.

```
<x>
ADD OK
```

- 6 Press **OK** or **[#]** to accept the destination phone number, represented by <x>
or
press **ADD** or **[2]** to add special characters and use your dialpad or follow the voice prompts to add characters.

```
Start: hhmm:
RETRY OK
```

- 7 Enter the start time for Off-premise Message Notification. This is a four-digit field. Any single-digit hour and minute must be preceded by a zero.

```
<start time>
RETRY AM PM
```

- 8 Press **AM** or **[1]**
or
PM or **[2]**.

```
<start time>
RETRY      OK
```

9 Press OK or # to accept the start time.

```
Stop hhmm:
RETRY      OK
```

10 Enter the time when Off-premise Message Notification is to stop. This is a four digit field. Any single digit hour and minute must be preceded by a zero.

```
<stop time>
RETRY  AM  PM
```

11 Press AM or 1 or PM or 2.

```
<stop time>
RETRY      OK
```

12 Press OK or # to accept the stop time.

```
More dest?
YES  NO
```

13 Press YES or 1 to set up another destination number.

```
Notify2: none
SETUP      NEXT
```

14 Press SETUP to set up another destination number.

```
Destination:
PHONE EXT  PAGER
```

15 Press PAGER or 3 to select a pager number destination.

```
Pager:
RETRY      OK
```

16 Enter the destination pager number and press OK or #.

```
<xxxx>
ADD      OK
```

17 Press OK or # to accept the destination pager number represented by <x> or press ADD or 2 to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press OK or #.

```
Show<xxxx>
CHNG      NEXT
```

18 Press NEXT or # to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you or press CHNG or 1 to change the pager message. The combined limit is 30 characters for the pager phone number and the pager message.

```
Notify2: pager
CHNG  OTHR  NEXT
```

19 The display shows that the second destination is a pager. Press NEXT or # to continue.

```
Notify 3: none
SETUP      NEXT
```

20 Press NEXT or # to continue or press SETUP to add another destination.

```
Start:<start time>
CHNG          NEXT
```

- 21** Press **NEXT** or **#** to accept the start time that you entered or press **CHNG** or **1** to change the start time.

```
Stop:<stop time>
CHNG          NEXT
```

- 22** Press **NEXT** or **#** to accept the stop time that you entered or press **CHNG** or **1** to change the stop time.

```
Msg type: new
CHNG          OK
```

- 23** Press **OK** or **#** to be notified when the skillset mailbox receives a new message or press **CHNG** or **1** to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN SELECT
```

- 24** Press **☎** to end the session.

Changing Off-premise Message Notification

You can change the parameters and destinations for Off-Premise Message Notification. Refer to [“Off-premise Message Notification parameters” on page 81](#) for more information about parameters.

If you want to change the time or message type parameters, use the procedure [“To change the time range or type of message parameters” on page 92](#)

If you want to change the destination type refer to the procedure for the destination type.

To change the destination type	refer to
from a phone to an extension, pager or another phone number	page 94
from a pager to an extension or phone	page 96
from a phone or extension to a pager	page 98

To change the time range or type of message parameters

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.
- 2 If you use the CallPilot interface:
 - Press **[8] [5]** to open the Mailbox Tools
 - Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
 - Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Ms9 notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Notify:<>
CHNG NEXT
```

- 4 Press **NEXT**.
If you want to change the destination type refer to [“To change the destination type” on page 92](#) for the appropriate procedure.

```
More dest?
YES NO
```

- 5 Press **NQ** or **[#]** to continue.

```
Start:<start time>
CHNG          NEXT
```

- 6** Press **CHNG** or **1** to change the start time or press **NEXT** or **#** to accept the start time.

```
Stop:<stop time>
CHNG          NEXT
```

- 7** Press **CHNG** or **1** to change the stop time or press **NEXT** or **#** to accept the stop time.

```
Msg type: new
CHNG          OK
```

- 8** Press **CHNG** or **1** to change the message type to urgent. Press **OK** or **#** to accept the new default message. You can choose to be notified of all new messages or urgent messages only. Change the message type to urgent to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN SELECT
```

- 9** Press **[End Call]** to end the session.

To change the destination from phone to another destination

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.
- 2 If you use the CallPilot interface:
 - Press **[8] [5]** to open the Mailbox Tools
 - Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
 - Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN  SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Notify: phone
CHNG  NEXT
```

- 4 Press **CHNG** or **[1]** to change the destination.

```
Destination:
PHONE  EXT  PAGER
```

- 5 Press **PHONE** or **[1]** to choose another phone number destination or press **EXT** or **[2]** to choose an extension destination or press **PAGER** or **[3]** to choose a pager number destination.

```
<>
RETRY  OK
```

- 6 Enter the destination number and press **OK** or **[#]**.
The destination phone number cannot be longer than 30 digits.

```
Accept:<xxxx>
RETRY  OK
```

- 7 Press **OK** or **[#]** to accept the destination number or press **RETRY** or **[*]** to re-enter the destination number.

```
Notify:<>
CHNG  NEXT
```

- 8 Press **NEXT** or **[#]** to continue or press **CHNG** or **[1]** to change the destination, and repeat steps 6 through 8.

```
More dest?
YES  NO
```

- 9 Press **YES** or **[1]** if you want to set up another destination number or press **NO** or **[#]** if you do not want to set up another destination number.

Start:<start time>
CHNG NEXT

- 10** Press **CHNG** or **1** to change the start time or press **NEXT** or **#** to accept the start time.

Stop:<stop time>
CHNG NEXT

- 11** Press **CHNG** or **1** to change the stop time or press **NEXT** or **#** to accept the stop time.

Msg type:new
CHNG OK

- 12** If you want to change message notification, press **CHNG** or **1** if you want to be notified only when the skillset mailbox receives an urgent message. Press **OK** or **#**.

Msg notify
ADMIN SELECT

- 13** Press **[End Call]** to end the session.

To change the destination from pager to phone or extension

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **[1]** to change Off-premise Message Notification. The display shows a review of the first destination type and destination number.

```
Modify:Pager
CHNG NEXT
```

- 4 Press **CHNG** or **[1]** to change the destination type and the destination number.

```
Destination:
PHONE EXT PAGER
```

- 5 Choose the type of destination number:
press **PHONE** or **[1]** to choose a phone number destination
or
press **EXT** or **[2]** to choose an extension destination.

```
<xxxx>:
RETRY OK
```

- 6 Enter the destination number you want to set up Off-Premise Message Notification for.
<x> represents the destination number.
Press **OK** or **[#]** to accept the destination number
or
press **RETRY** or **[*]** to re-enter the number.

```
Notify:<x>
CHNG NEXT
```

- 7 Press **NEXT** or **[#]** to continue.

```
More dest?
YES NO
```

- 8 Press **YES** or **[1]** if you want to set up another destination, and repeat steps 6 through 8
or
press **NO** or **[#]** if you do not want to set up another destination.

Start:<start time>
CHNG NEXT

- 9** Press **CHNG** or **1** to change the start time or press **NEXT** or **#** to accept the start time.

Stop:<stop time>
CHNG NEXT

- 10** Press **CHNG** or **1** to change the stop time or press **NEXT** or **#** to accept the stop time.

Msg type:new
CHNG OK

- 11** If you want to change message notification, press **CHNG** or **1** if you want to be notified only when the skillset mailbox receives an urgent message. Press **OK** or **#**.

Msg notify
ADMIN SELECT

- 12** Press **[End Call]** to end the session.

To change the destination from phone or extension to pager

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN  SELECT
```

- 3 Press **ADMIN** or **[1]** to change Off-premise Message Notification. The displays show a review of the first destination type and destination number.

```
Notify:<x>
CHNG      NEXT
```

- 4 Press **CHNG** or **[1]** to change the destination type and the destination number.
<x> represents the type of destination (phone or extension).

```
Destination
PHONE  EXT  PAGER
```

- 5 Press **PAGER** or **[3]** to choose a pager number destination.


```
Pager:
RETRY      OK
```

- 6 Enter the pager number and press **OK** or **[#]** to continue.

```
<x>
ADD      OK
```

- 7 Press **OK** or **[#]** to accept the destination pager number represented by <x>
or
press **ADD** or **[2]** to add special characters and use your dialpad or follow the voice prompts to add characters.

After you add special characters, press **OK** or **[#]**.

- Show:<xxxx>**
CHNG **NEXT**
- 8** Press **NEXT** or **#** to accept the default pager message represented by <xxxx>. The default pager message sent by CallPilot is the CallPilot extension. This is the sequence of digits that is sent after the pager service is dialed, to notify you of who is paging you or press **CHNG** or **1** to change the pager message. The combined limit is 30 characters for the pager phone number and the pager message.
- Notify: pager**
CHNG **NEXT**
- 9** The display shows notification is set up to a pager. Press **NEXT** or **#** to continue.
- More dest?**
YES **NO**
- 10** Press **YES** if you want to set up another destination number or press **NO** if you do not want to set up another destination number.
- Msg type: new**
CHNG **OK**
- 11** Press **OK** or **#** if you want to be notified when the skillset mailbox receives a new message or press **CHNG** or **1** if you want to be notified only when the skillset mailbox receives an urgent message.
- Msg notify**
ADMIN **SELECT**
- 12** Press  to end the session.

Deleting a destination number

If you have more than one destination number for Off-premise Message Notification, you can delete a destination.

To delete a destination number

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Ms9 notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Notify1:<>
CHNG OTHR NEXT
```

- 4 Press **OTHR** if you want to delete the first destination or press **NEXT** or **[#]** to view the other destinations until you find the destination that you want to delete. When you find the destination that you want to delete, press **OTHR**.

```
Notify 1:<>
DEL INS QUIT
```

- 5 Press **DEL** to delete the first destination number.

```
Notify1:<>
CHNG OTHR NEXT
```

- 6 The first destination number is deleted. The Notify 2 destination changes to become the Notify 1 destination number. To delete more destination numbers, press **OTHR** and repeat steps 4 and 5.

```
Ms9 notify
ADMIN SELECT
```

- 7 Press **[*]** to end the session.

Adding a destination number

Use this procedure if you have set up Off-premise Message Notification and you want to add another destination number. You can have up to five destination numbers.

To add a destination number

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN SELECT
```

- 3 Press **ADMIN** or **[1]** to set up Off-premise Message Notification.

```
Notify:<>
CHNG      NEXT
```

- 4 Press **NEXT** or **[#]** to continue.

```
More dest?
YES      NO
```

- 5 Press **YES** or **[1]** to set up another destination number.

```
Notify2: none
SETUP    NEXT
```

- 6 Press **SETUP** or **[1]** to set up another destination number and follow the steps in [“To set up Off-premise Message Notification to a phone number”](#) on page 82
or
[“To set up Off-premise Message Notification to an extension”](#) on page 85
or
[“To set up Off-premise Message Notification to a pager”](#) on page 87.

Turning Off-premise Message Notification on or off

You can turn Off-premise Message Notification on or off at any time. If you turn Off-premise Message Notification off, you do not affect any of the assigned parameters.

To turn Off-premise Message Notification on or off

- 1 Press **[*] 9 8 1**.
Follow the voice prompts or the display button options to open the skillset mailbox.

- 2 If you use the CallPilot interface:

- Press **[8] [5]** to open the Mailbox Tools
- Press **NOTIF** or **[2]** to open the Off-premise Message Notification menu
- Go to step 3

If you use the Norstar Voice Mail interface:

- Press **ADMIN** or **[8]**
- Press **[6]** to open the Off-premise Message Notification menu
- Go to step 3

```
Msg notify
ADMIN SELECT
```

- 3 Press **SELECT** or **[2]** to set up Off-premise Message Notification.

```
Notify on
CHNG TIME OK
```

- 4 Press **CHNG** or **[1]** to turn Off-premise Message Notification off if it is on (as shown).

```
Notify off
CHNG TIME OK
```

- 5 Press **OK** or **[*]**
or
press **TIME** to review the start and stop time parameters.

```
Mailbox admin
GREET PSWD QUIT
```

- 6 Press **[*]** to end the session.

Chapter 8

Recording Call Center Greetings

About Call Center greetings

Call Center greetings encourage callers to stay on the line until an agent is available. You can record greetings in different languages and change them as often as you like.

You can include information in your greetings such as:

- your hours of service
- a request for callers to have their account number ready
- how to leave a message
- an announcement of a sale
- product lists
- upcoming special events

The table [“A comparison of Basic and Professional Call Center” on page 13](#) shows how many greetings you can record, depending on which Call Center you use.

Types of Call Center greetings

You can record different types of greetings for Call Center. Before you record your greeting, determine what information the greeting includes. When you prepare your greeting, include important times and dates. Keep greetings as short and concise as possible. Use the following examples of greetings as a reference.

General company greeting	The general company greeting informs callers that they have reached the correct company. It can also include the location and business hours of your company. <i>“Thank you for calling Bridgestone Computers. We are located at 52 Main Street. Our hours of service are Monday to Friday from 8:00 until 5:00. Please stay on the line and an agent will be with you as soon as possible. Or press 0 to leave a message and one of our agents will return your call.”</i>
Please wait greeting	Please wait greetings encourage callers to stay on the line. <i>“All our agents at Bridgestone Computers are currently busy, but please hold as your call is very important to us.”</i>
Information greeting	An information greeting provides messages and announcements to callers. <i>“Thank you for calling Bridgestone Computers. This week we have extended our hours until we sell all spring merchandise. We will be open until 9:00 pm Monday through Thursday, and we will be open until midnight on Friday! Please come in and see us at 52 Main Street.”</i>

Transfer greeting	A transfer greeting lets a caller transfer their call. <i>"Please press 1 to leave a message and one of our agents will return your call. Press 2 to return to the previous choices."</i>
Non-business hours greeting	Your non-business hours greeting will be played after your business is closed: <i>"You have reached Bridgestone Computers. Our hours of service are Monday to Friday from 8:00 until 12:00 and 1:00 until 5:00. To leave a message, please press zero. An agent will return your call when we re-open. Thank you for calling."</i>

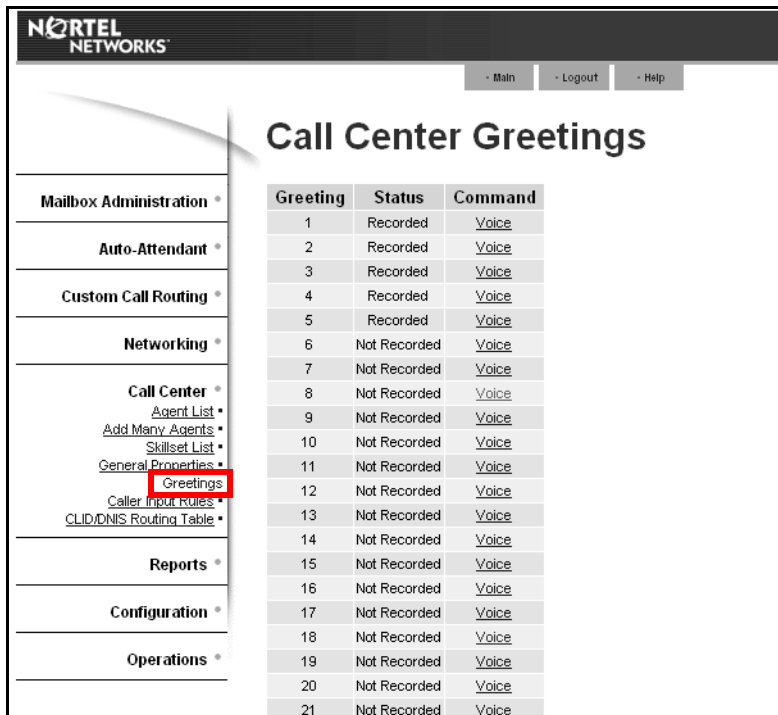
Recording a Call Center greeting

Before you record a greeting, write the greeting out so that you include everything that you want to say.

We recommend that you record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, callers must wait in a skillset a longer time before they hear another greeting.

To record a call center greeting

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Greetings** link.
The Call Center Greetings page appears.



The screenshot shows the Nortel Networks Call Center Greetings page. The navigation menu on the left includes sections like Mailbox Administration, Auto-Attendant, Custom Call Routing, Networking, Call Center, Reports, Configuration, and Operations. Under the Call Center section, the 'Greetings' link is highlighted with a red box. The main content area displays a table with the following data:

Greeting	Status	Command
1	Recorded	Voice
2	Recorded	Voice
3	Recorded	Voice
4	Recorded	Voice
5	Recorded	Voice
6	Not Recorded	Voice
7	Not Recorded	Voice
8	Not Recorded	Voice
9	Not Recorded	Voice
10	Not Recorded	Voice
11	Not Recorded	Voice
12	Not Recorded	Voice
13	Not Recorded	Voice
14	Not Recorded	Voice
15	Not Recorded	Voice
16	Not Recorded	Voice
17	Not Recorded	Voice
18	Not Recorded	Voice
19	Not Recorded	Voice
20	Not Recorded	Voice
21	Not Recorded	Voice

- 4 Click the **Voice** link for the number of the greeting you want to record. The page you can record a greeting from appears. If you use CallPilot 150, the import and export options do not appear.

Call Center Greeting 4

Phone Set:

Connect To:

Changes to the recording are applied ONLY when the SAVE button is pressed BEFORE hanging up.

<input type="button" value="Play"/>	<input type="button" value="Stop"/>
<input type="button" value="Record"/>	<input type="button" value="Save"/>

Import:

From:

Export:

[Native Encoding](#) [Wav Encoding](#)

- 5 In the **Connect to** box, type the extension number or telephone number you are using to record the greeting.
For a local extension, type the extension number. For a telephone number that is not a local extension, type the sequence of digits that dial the telephone number from the voicemail system. For example, you might need to dial 9, the area code, and then the telephone number.
- 6 Click the **Dial** button.
The telephone rings.
- 7 Pick up the handset. Do not use Handsfree. Click the **Record** button. After the tone, record your greeting.
- 8 After you finish recording, click the **Stop** button.
- 9 To listen to the recording, click the **Play** button
or
to save the recording, click the **Save** button.
The recording replaces a previously recorded greeting.
- 10 Click the **Close** button and replace the telephone handset.

You can disconnect the telephone by clicking the Hang Up button or replacing the telephone handset. The next time you use Play or Record, the phone number shown in the Connect to box is dialed. You do not need to hang up each time. The connection remains for several minutes, even if you close the page. You can access another greeting without having to re-answer your telephone. The connection disconnects after several minutes of inactivity, or if you log off CallPilot Manager.

Importing a Call Center greeting

If you use Professional Call Center on Business Communications Manager 3.0 you can import a previously recorded greeting. You cannot import a previously recorded greeting if you use CallPilot 150.

To import a previously recorded greeting

- 1** Start CallPilot Manager.
- 2** Click the **Call Center** heading.
- 3** Click the **Greetings** link.
The Call Center Greetings page appears.
- 4** Click the **Voice** link for the number of the greeting you want to record.
The page you can record a greeting from appears.
- 5** If you know the location of the greeting, in the **Import** box type the location of the file and click the **Send** button
or
if you do not know the location of the greeting, at the **Import** option click the **Browse** button and follow steps 6 through 9.
The Open dialog box appears.
- 6** From the **Look in** list, select the location of the file.
- 7** In the **File name** box, type the file name.
- 8** From the **Files of type** list, select the file type.
- 9** Click the **Open** button.
- 10** Click the **Send** button.
- 11** To play the greeting, in the **Connect to** box type an extension or telephone number and click the **Play** button.
Your telephone rings.
- 12** Answer the phone to listen to the greeting.
- 13** Click the **Save** button to save the greeting.
The greeting you save replaces the previously recorded greeting.
- 14** Click the **Close** button and replace the telephone handset.

Exporting a Call Center greeting

If you use Professional Call Center on Business Communications Manager 3.0, you can export a previously recorded greeting to a computer file in WAV or in its native format. You cannot export a previously recorded greeting if you use CallPilot 150.

Export the greeting in its native format if you want to re-import the file later. You can re-import the file to your system or another Call Center or CallPilot system. Export the file in its native format if you want to use the same greetings at different company locations. If you keep the file in its native format, you avoid converting the file to another format, which can lessen its sound quality.

Export the greeting in WAV format if you want to edit the sound file on your computer.

To export a previously recorded greeting

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Greetings** link.
The Call Center Greetings page appears.
- 4 Click the **Voice** link for the number of the greeting you want to export.
The page you can export a greeting from appears.
- 5 At the **Export** option click either the **Native Encoding** or **WAV Encoding** link.
The File Download dialog box appears.
- 6 Click **Save this file to disk** and click the **OK** button.
The Save As dialog box appears.
- 7 From the **Save in** list box, navigate to where you want to save the file and click the **Save** button.

Chapter 9

Setting up Routing Tables

About Routing Tables

Routing tables determine how the system answers, holds and routes incoming calls to agents in your call center. You set up routing tables to handle incoming calls for each skillset. A call in a skillset receives the treatment specified by the routing table. The treatment can be a combination of greetings, transfers, distribution, and being on hold. If an agent becomes available, the call is sent to the available agent.

Each skillset has a Day and a Night Routing Table. Set up the Day Routing Table for your business hours. Set up the Night Routing Table for your non-business hours.

The maximum number of steps you can add to a routing table is 20.

You can record the routing table steps you create in [“Routing Tables” on page 188](#).

About Intelligent routing

Intelligent routing gives you tremendous flexibility in controlling how calls are routed. Intelligent routing includes these methods for moving a call, based on various conditions:

Intelligent CLID/DNIS Routing	<ul style="list-style-type: none"> the ability to route calls according to Voice Button, CLID/ANI, DNIS, ISDN Calling Number this routing is applied when the call first enters the Call Center is available if you use Professional Call Center for information on CLID/DNIS routing, refer to “Setting up CLID/DNIS Routing” on page 44.
Intelligent Caller Input Routing, Basic	<ul style="list-style-type: none"> the ability to route calls to the Automated Attendant, a CCR Tree, an operator or a skillset mailbox this routing is applied when callers press a key in response to instructions in a greeting
Intelligent Caller Input Routing, Advanced	<ul style="list-style-type: none"> includes the Basic capabilities plus the ability to create rules that route calls to other skillsets and locations depending on the caller input lets you change the priority of the call is available if you use Professional Call Center
Intelligent Overflow Routing	<ul style="list-style-type: none"> routes calls to extensions, mailboxes, external phone number, the Automated Attendant, the skillset mailbox or CCR Tree as a transfer target lets you change the priority of the call is available if you use the Business Communications Manager 3.0 system

Intelligent Overflow Routing

Use Intelligent Overflow Routing to control how calls are handled that are waiting in a skillset for an agent. You can specify that a waiting call:

- overflows to one or more skillsets and keeps its conditions and original skillset greetings
- moves to another skillset where the call loses its conditions, becomes part of the new skillset, and hears the new skillset greetings. The system tracks the total length of the call from the time the call enters the system until it is answered.
- transfers to the skillset mailbox
- transfers to an extension, mailbox, external telephone number, CCR Tree, Automated Attendant or operator
- changes in priority level

Intelligent Overflow Routing handles calls differently depending on the rules that you create. Each rule is based on a mode, one or more conditions, and one or more actions.

Mode

Intelligent Overflow Routing looks at the mode the skillset is in to determine how to handle a call. A skillset can be in Day mode, Night mode, or 24 Hour Service. Each mode can have its own rules for how to handle calls. The default mode is Day.

Condition

After Intelligent Overflow Routing determines what mode the skillset is in, Intelligent Overflow Routing determines what conditions apply to the call. The two possible conditions are:

- Whether the timer expires. You set the length of time a call waits for an agent before the call is sent to the destination that you specify. The maximum time a call can wait is 59:59. When a call enters a skillset, the timer starts at 00:00. Overflow rules are applied according to the time a call is in a skillset, not according to the total time a call is in the system. For example, if you set up skillset 1 to move a call to skillset 2 after five minutes, and you set up skillset 2 to move a call to skillset 1 after two minutes, a call in skillset 1 will be moved to skillset 2 after five minutes. The call will move back to skillset 1 after an additional two minutes, then back to skillset 2 after an additional five minutes.
- Whether there are agents logged on to the skillset. If there are no agents logged on to the skillset, the call is sent to the destination that you specify. If you select the Agents Not Logged In check box, the overflow rule applies if there are no agents logged on to the skillset. If you do not select the Agents Not Logged In check box, the overflow rule applies if there are agents logged on to the skillset.



Note: You can select both conditions within the same rule.

Action

When Intelligent Overflow Routing determines that a condition is met for the call, the call goes to the destination you specify. Possible actions are:

- moving the call to a new skillset.
The caller hears the greetings for the new skillset.
- overflowing the call to one or more skillsets.
The caller continues to hear the greetings from the original skillset.
- sending the call to the skillset mailbox
- transferring the call to an extension, external number, mailbox, Automated Attendant, CCR Tree or operator
- changing the priority of the call

Examples of Intelligent Overflow Routing rules

Intelligent Overflow Routing gives you flexibility in setting the rules for how calls are handled. The following tables show examples of different ways you can configure Intelligent Overflow Routing rules.

Example 1

In this example, calls to the call center go to skillset 1, which is the company's service department. If a call is not answered by an agent within two and a half minutes, the call overflows to skillsets 2 and 3, the sales department skillsets. An agent from any of the three skillsets can answer the call.

The Call Center Administrator:

- selects the Day service mode
- sets the timer for 2 minutes and 30 seconds
- selects Overflow to Skillset as the action
- selects skillsets 2 and 3

Mode	Conditions	Action	Explanation
Day	02:30	Overflow: 2,3	This Intelligent Overflow Routing rule applies only if there are one or more agents are logged on. If a call is not answered by an agent before 2 minutes and 30 seconds, the call overflows to skillsets 2 and 3. When a call overflows, it also remains queued at the original skillset destination.



Note: If you want calls to overflow to multiple skillsets, specify all the skillsets in the same rule. The call bypasses skillsets with busy agents and overflows to the next skillset with an available agent.

Example 2

In this example, calls to the call center go to skillset 1. The Administrator wants to ensure that lower priority calls do not wait in a skillset indefinitely. If a call waits for 2 minutes or more, a higher priority is assigned to the call.

The Call Center Administrator:

- selects the 24 Hour Service mode
- sets the timer for 2 minutes
- selects Change Call Priority only as the action and selects 1 as the new call priority

Mode	Conditions	Action	Explanation
24 Hour	02:00	Change call priority to 1	This Intelligent Overflow Routing rule applies to any call that has been waiting in skillset 1 for 2 minutes. If a call is not answered by an agent when the timer elapses, the call priority changes to the highest priority.

Example 3

In this example, calls to the call center go to skillset 1, which is the company help line. If there are no agents logged on to the help line, the call moves to skillset 2, which is the company's service department. When a call moves to a new skillset, it does not remain queued at the original skillset destination.

The Call Center Administrator:

- selects the Day service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

Mode	Conditions	Action	Explanation
Day	No Agents	Move to Skillset 2	Intelligent Overflow Routing checks to see whether agents are logged on to skillset 1, but does not check the timer. If there are no agents logged on to skillset 1, the call moves to skillset 2 and gets the new greetings for skillset 2. When a call moves to a new skillset, it does not remain queued at the original skillset destination.

Example 4

In this example, calls to the call center go to skillset 1, which is the company help line. If no agents are logged on to skillset 1, the call immediately moves to skillset 2. If agents are logged on to skillset 1 and the call is not answered within two and a half minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Call Center Administrator creates two rules. In the first rule the Call Center Administrator:

- selects the 24 Hour service mode
- selects the Agents not logged in check box
- selects Move to Skillset as the action
- selects skillset 2

In the second rule the Call Center Administrator:

- selects the 24 Hour service mode
- sets the timer to 2 minutes and 30 seconds
- selects the skillset mailbox as the action

Mode	Conditions	Action	Explanation
24 Hour	No Agents	Move to Skillset 2	The call moves to skillset 2 if no agents are logged on. If agents are logged on and the call is not answered within 2 minutes and 30 seconds, the call transfers to the skillset mailbox.
24 Hour	02:30	Skillset Mailbox	

Example 5

In this example, calls to the call center go to skillset 1, which is the company's help line. If the call is not answered by an agent within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1, the call overflows to skillset 2, which is the service department. If the call is not answered within an additional two minutes, the call transfers to the skillset mailbox where the caller can leave a message.

The Call Center Administrator creates two rules. In the first rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow to skillset as the action
- selects skillset 2

In the second rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 4 minutes and 30 seconds
- selects the Agents not logged in check box
- selects the skillset mailbox as the action

Mode	Conditions	Action	Explanation
Day	02:30 and No Agents	Overflow: 2	The call overflows to skillset 2 after the call is in skillset 1 for 2 minutes and 30 seconds and if there are no agents logged on to skillset 1. If the call is not answered within an additional 2 minutes the call transfers to the skillset mailbox.
Day	04:30 and No Agents	Skillset Mailbox	

Example 6

In this example, calls to the call center go to skillset 1, which is the company's help line. The Night Service Mode is set to start at 6:00 pm. After 6:00 pm there are no other skillsets with agents logged on. If no agents are logged on to skillset 1 or if the call is not answered by an agent within two and a half minutes, the call transfers to the skillset mailbox.

In this example, the Call Center Administrator inserts two rules. The Call Center Administrator:

- selects the Night service mode for both rules
- sets the timer to 2 minutes and 30 seconds as the condition for the first rule
- selects the Agents not logged in check box as the condition for the second rule
- selects the skillset mailbox as the action for both rules

Mode	Conditions	Action	Explanation
Night	02:30	Skillset Mailbox	The call transfers to the skillset mailbox if the call is not answered within 2 minutes and 30 seconds.
Night	No Agents	Skillset Mailbox	The call transfers to the skillset mailbox if there are no agents logged on to skillset 1.

Example 7

In this example, calls to the call center go to skillset 1, which is the company's order desk. Skillset 1 agents are the company's experienced sales agents. If no agents are logged on to skillset 1 and if the call is not answered by an agent within two and a half minutes, the call overflows to skillset 2. Skillset 2 agents are the company's less experienced sales agents.

The Call Center Administrator:

- selects the Day service mode
- sets the timer to 2 minutes and 30 seconds
- selects the Agents not logged in check box
- selects Overflow as the action
- selects skillset 2

Mode	Conditions	Action	Explanation
Day	02:30 and No Agents	Overflow: 2	The call overflows to skillset 2 if the call is not answered within 2 minutes and 30 seconds and if there are no agents logged on to skillset 1.

Example 8

In this example, calls to the call center are answered by skillset 1, the company's sales skillset. If a call is not answered within 10 seconds, it overflows to skillsets 2, 3 and 4. If the call is not answered within an additional 20 seconds, the call goes to the skillset 1 mailbox.

The Call Center Administrator creates two rules.

In the first rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 10 seconds
- sets Overflow as the action
- selects skillsets 2, 3 and 4

In the second rule the Call Center Administrator:

- selects the Day service mode
- sets the timer to 20 seconds
- selects the skillset mailbox as the action

Mode	Conditions	Action	Explanation
Day	00:10	Overflow: 2, 3, 4	The call overflows to skillsets 2, 3 and 4 if the call is not answered within 10 seconds. The call goes to the skillset mailbox if it is not answered within an additional 20 seconds.
Day	00:30	Skillset Mailbox	



Note: We recommend a minimum of 10 seconds between timer rules.

Assigning Intelligent Overflow Routing to a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Overflow** link for the skillset you want to add Intelligent Overflow Routing to.
The Overflow Rule Table page appears.

Overflow Rule Table

Skillset 7

Rule	Mode	Condition	Action	Commands
1	Day	No Agents	Skillset Mailbox 229	Insert Modify Delete Move
End				Insert

- 5 Click the **Insert** link for Rule 1.
The Overflow Rule page appears.

Overflow Rule

Skillset 2

Service Mode:

Timer: (mm:ss)

Agents Not Logged In

Action:

Move to Skillset:

Send to Skillset Mailbox

Overflow to Skillset:
Specify

Transfer to

Extension:

Transfer to Mailbox:

Transfer to External:

Outdial Method: (Line/Pool #)

Transfer to Auto-Attendant

Transfer to Operator

Transfer to CCR:

Change Call Priority Only

New Call Priority:

- 6 From the **Service Mode** list box select **Day**, **Night** or **24 Hour**.

- 7 Select the **Timer** check box if you want Intelligent Overflow Routing to time how long the call waits, and enter the time that a call waits in the skillset before it goes to the destination that you specify.
- 8 Select the **Agents Not Logged In** check box to if you want Intelligent Overflow Routing to check whether there are agents logged on to the skillset
or
do not select the **Agents Not Logged In** check box and Intelligent Overflow Routing does not check to see if agents are logged on to the skillset.
- 9 At the **Action** option, select the destination for calls:
 - to send the call to another skillset, select **Move to Skillset**, and from the list box select the skillset you want to move to call to. If you also want to change the priority of the call, from the **New Call Priority** list box select a new priority for the call. The default is 10.
 - to send the call to the skillset mailbox, select **Send to Skillset Mailbox**
 - to overflow the call to another skillset:
 - Select **Overflow to Skillset** and click the **Specify** link.
The Overflow to Skillset Configuration page appears.
 - Select the check box for the skillset you want to overflow to, and click the **Submit** button.
 - If you want to change the priority of the call, from the **New Call Priority** list box select a new priority for the call. The default is 10.
 - to transfer the call to an extension, select **Transfer to Extension** and enter the extension number
 - to transfer the call to a mailbox, select **Transfer to Mailbox** and enter the mailbox number
 - to transfer the call to an external number:
 - Select **Transfer to External**
 - Enter the external number
 - From the **Outdial** list box select **Line, Pool** or **Route**
 - If you select Line or Pool, enter the line or line pool number
 - to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant**
 - to transfer the call to an operator select **Transfer to Operator**
 - to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to



Note: You or the System Administrator must set up a CCR Tree before callers can transfer to it. For how to set up a CCR Tree, refer to the *CallPilot Manager Set Up and Operation Guide*.

- 10 Click the **Submit** button.

Moving an Intelligent Overflow rule

After you create an Intelligent Overflow rule, you can move it to another location in the Overflow Rule Table. Intelligent Overflow rules are applied to calls in the order that the rules appear in the Overflow Rule Table.

To move a rule

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Overflow** link for the skillset that has the rule you want to move.
The Overflow Rule Table page appears.

Overflow Rule Table				
Skillset 7				
Rule	Mode	Condition	Action	Commands
1	Day	No Agents	Skillset Mailbox 229	Insert Modify Delete Move
End				Insert

[Close](#)

- 5 Click the **Move** link for the rule you want to move.
The Overflow Rule Table - Move page appears.

Overflow Rule Table - Move				
Skillset 3				
Rule	Mode	Condition	Action	Move
1	Day	02:00	Overflow: 2 Priority 1	(Cancel)
2	Day	No Agents	Skillset Mailbox 426	Here
3	Night	No Agents	Skillset Mailbox 426	Here
End				

- 6 Click the **Here** link for the location you want to move the rule to.
The Overflow Rule Table page shows the rule in its new location.
- 7 Click the **Close** button.

Modifying an Intelligent Overflow Rule

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Overflow** link for the skillset with the rule you want to modify.
The Overflow Rule Table page appears.
- 5 Click the **Modify** link for the rule you want to modify.
The Overflow Rule page appears.
- 6 Change the mode, conditions or actions for the rule.
- 7 Click the **Submit** button.
The modified rule appears in the Overflow Rule Table page.
- 8 Click the **Close** button.

Deleting an Intelligent Overflow Rule

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Overflow** link for the skillset with the rule you want to delete.
The Overflow Rule Table page appears.
- 5 Click the **Delete** link for the rule you want to delete.
A message appears that asks you to confirm the deletion.
- 6 Click the **OK** button.
The rule is deleted from the Overflow Rule Table page.
- 7 Click the **Close** button.

Day and Night Routing Tables

Fax Detection

Call Center can detect fax calls and route them to a skillset mailbox. If you want Call Center to detect incoming faxes, you must make your first routing table step:

- a Greeting step
- with Forced Play
- without a transfer
- with a greeting that is a minimum of 11 seconds long

Fax Detection applies only if a fax machine is attempting to transmit a fax at the start of a greeting. If a fax transmission starts several seconds after the start of a greeting, it is possible for the fax tone not to be detected.

If you do not set up the routing table so it detects a fax call, some fax calls can be routed to agents, and some fax calls can be routed to the routing table's skillset mailbox.

To enable a routing table to detect fax calls, change the first step.

As you create routing tables, each table shows whether it detects faxes.

Day Routing Table

Skillset 4
 This routing table guarantees fax delivery to the skillset mailbox ([more information](#)).

Step	Information	Commands
1	Greeting 1, Forced, No Transfer	Insert Modify Delete
2	Distribute For 01:00	Insert Modify Delete
3	Greeting 1, Normal, Transfer	Insert Modify Delete
4	Distribute For 00:30	Insert Modify Delete
5	Greeting 1, Normal, Transfer	Insert Modify Delete
6	Goto Step 2	Insert Modify Delete
End		Insert

[Close](#)

This routing table detects fax calls.

Its first step is a Greeting step:

- that is 11 seconds or longer
- that is Forced Play
- that does not have a transfer

Day Routing Table

Skillset 1
 This routing table **DOES NOT** guarantee fax delivery to the skillset mailbox ([more information](#)).

Step	Information	Commands
1	Disconnect	View
End		

[Close](#)

This routing table does not guarantee fax detection.

About types of Routing Table steps

You can add these types of steps to routing tables:

Greeting	A Greeting step plays a greeting to callers waiting in a skillset. You assign greeting parameters to each greeting. After the greeting plays, the call goes to the next routing step. If there is no next step, the call ends.
Distribute for	<p>During a distribute for step, calls wait to be distributed to agents. If no agents are available before the distribution time expires, the call goes to the next step in the routing table. If there is no next step set up in the routing table, the call ends.</p> <p>The minimum distribution time is zero and the maximum distribution time is 59 minutes and 59 seconds. The default distribution time is 30 seconds.</p>
Goto	<p>A Goto step is the last step in a routing table. A Goto step moves the caller to an earlier routing step.</p> <p>For example, if a Goto step points to step 1, the call goes back to step 1 and repeats the steps. The steps are repeated until an agent becomes available or the caller leaves a message in the skillset mailbox.</p> <p>The first step in a routing table cannot be a Goto step because there are no possible target steps yet.</p> <p>A Goto step cannot point to itself.</p>
Transfer	<p>A transfer step can transfer calls to:</p> <ul style="list-style-type: none"> • an extension • a mailbox • an external number • the Automated Attendant • an operator • a CCR Tree
Disconnect	A Disconnect step releases calls from the skillset. If the first step in a routing table is a Disconnect, Call Center does not answer the call.

Greeting step parameters

You can assign these parameters to greeting steps. If the first step in a routing table is a Greeting step, it can detect fax calls and route them to the skillset mailbox for the routing table. For more information refer to [“Fax Detection” on page 121](#).

Forced Play	<p>Enable Forced Play for a greeting that contains important information that you want callers to hear. If an agent becomes available while a caller is listening to a Forced greeting, the greeting is not interrupted. The caller must listen to the entire greeting.</p> <p>If you do not enable Forced Play, when an agent becomes available the greeting is interrupted and the call goes to the available agent.</p> <p>Limit the number of Forced Play greetings and keep Forced Play greetings as short as possible. Long Forced Play greetings increase the transfer time of calls to agents and cause unpredictable increases in distribution times. For more information, refer to “Routing Table administration” on page 172.</p>
Intelligent Caller Input Routing, Basic	<p>While the greeting plays callers can:</p> <ul style="list-style-type: none"> • press 1 to transfer to the Automated Attendant • press 0 to transfer to the Operator • press 9 to leave a message in the skillset mailbox • press 2 to transfer to a CCR Tree <p>These are the default keypad buttons. You can change the keypad buttons. Ensure that the Non-business hours greetings have Intelligent Call Input Routing, Basic enabled so that callers can direct how they transfer their calls.</p>
Intelligent Caller Input Routing, Advanced	<p>Advanced Intelligent Caller Input Routing is available if you use Professional Call Center.</p> <p>Intelligent Caller Input Routing, Advanced uses the Caller Input Rules you create to change the priority and route calls to other skillsets or locations based on caller multi-digit DTMF input.</p> <p>Callers enter a sequence of DTMF digits such as a charge card number or passcode. The caller input is used to determine call treatment. Based on the caller input, the call can change in priority and/or be routed to:</p> <ul style="list-style-type: none"> • the Automated Attendant • the Operator • the skillset mailbox • a CCR Tree • a mailbox • an extension • an external number • another skillset <p>Intelligent Caller Input Routing, Advanced parameters:</p> <ul style="list-style-type: none"> • Retries is 0-5, default is 2. This is the number of times a Data Entry step repeats itself on a caller entry error. • The Caller Input Rules Table is 1-9, default 1. This is the rules table used for processing the route step.
No Intelligent Caller Input Routing	<p>While the greeting plays callers cannot press a dialpad button to transfer their call. Call Center ignores buttons pressed on the dialpad. The greeting plays without interruption. This is the default setting. At the end of the greeting, the caller goes to the next routing step. If there is no next step, the call ends.</p>

Adding a Greeting step

Greeting steps play a message to waiting callers.

To add a Greeting step

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillsets List page appears.

Skillset List										
Skillset	Name	CDN	Status	Commands						
1	Documentation	223	Enabled	Properties	Agents	Day	Night	ServiceMode	Overflow	Disable
2	Testing	224	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
3	Alt Lang Testing	225	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
4	Calgary	226	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
5	Ottawa	227	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
6	Santa Clara	228	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
7	Vancouver	229	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
8	unused	---	--	Configure						
9	unused	---	--	Configure						
10	unused	---	--	Configure						

- 4 Click the **Day** or the **Night** link for the skillset to which you want to add a greeting step.
The Day or the Night Routing Table page appears.

Day Routing Table		
Skillset		7
This routing table DOES NOT guarantee fax delivery to the skillset mailbox (more information).		
Step	Information	Commands
End		Insert
Close		

- 5 Click the **Insert** link.
The Routing Step page appears.

Routing Step

Skillset 1 Step Number 1

Step Type:

Greeting:

Forced Play:

Distribute for: (mm:ss)

Transfer to Extension:

Transfer to mailbox:

Transfer to external:

Transfer to Auto Attendant

Transfer to Operator

Transfer to CCR:

Disconnect

Intelligent Caller Input Routing: (for Greeting step only)

None

Basic

Auto Attendant

Operator

Skillset Mailbox

CCR Tree

Advanced

Retries

Caller Input Rules Table

- 6 At the **Step Type** option, select **Greeting** and enter the greeting number you want to use.
- 7 If you want the caller to listen to the entire message before they transfer to an agent, select the **Forced Play** check box.
- 8 At the **Intelligent Caller Input Routing** option, select how you want callers to be able to transfer their calls:
- Select **None** if you do not want callers to be able to transfer their calls.
 - Select **Basic** if you want callers to be able to transfer to the Automated Attendant, operator, skillset mailbox or a CCR Tree. Select the transfers available to callers:
 - Select the **Auto Attendant** check box if you want callers to be able to transfer to the Automated Attendant. By default callers press to transfer to the Automated Attendant. You can assign a different dialpad button by selecting a number from the list box.

- Select the **Operator** check box if you want callers to be able to transfer to the Operator. By default callers press **0** to transfer to the Operator. You can assign a different dialpad button by selecting a number from the list box.
- Select the **Skillset Mailbox** check box if you want callers to be able to transfer to the skillset mailbox. By default callers press **9** to transfer to the skillset mailbox. You can assign a different dialpad button by selecting a number from the list box.
- Select the **CCR** check box if you want callers to be able to transfer to a CCR Tree. By default callers press **2** to transfer to a CCR Tree. You can assign a different dialpad button by selecting a number from the list box. From the **Tree** list box select the CCR Tree you want callers to transfer to.



Note: You or the System Administrator must set up a CCR Tree before callers can transfer to it. For how to set up a CCR Tree, refer to the *CallPilot Manager Set Up and Operation Guide*.

- Select **Advanced** if you want callers to be able to enter multiple digits such as a passcode or a credit card number. Advanced is available only if you use Call Center Professional. Select the Advanced parameters:
 - From the **Retries** list box select the a number between 0 and 5.
The default is 2. This is the number of times a Data Entry step repeats itself on a caller entry error.
 - From the **Caller Input Rules Table** list box select a number between 1 and 9.
The default is 1. This is the rules table used for processing this route step.
You must have created rules in the Caller Input Rules Table. For more information, refer to [“Creating Caller Input Rules” on page 140](#).
- 9** Click the **Submit** button.
The Greeting step appears in the Routing Table list.
- 10** Click the **Close** button to return to the Skillset list.

Adding a Distribute for step

Distribute for steps put callers on hold while they wait for an agent.

To add a Distribute for step

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Day** or the **Night** link for the skillset you want to add a distribution step to.
The Day or Night Routing Table page appears for the skillset.
- 5 Click the **Insert** link for the step you want to add a Distribute for step to.
The Routing Step page appears.
- 6 Click the **Distribute for** option.
- 7 In the **Distribute for** box enter the longest time in minutes and seconds that callers can wait on hold in this step.
- 8 Click the **Submit** button.
The Distribute For step appears in the Routing Table list.
- 9 Click the **Close** button to return to the Skillset list.

Adding a Goto step

Goto steps send a caller to another step in the routing table. You can add a Goto step only to the end of a routing table.

To add a Goto step

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset** link.
The Skillset List page appears.
- 4 Click the **Day** or the **Night** link for the skillset you want to add a Goto step to.
The Day or the Night Routing Table page appears.
- 5 Click the **Insert** link for the step you want to add a Goto step to.
The Routing Step page appears.
- 6 Click the **Goto Step** option.
- 7 From the **Goto Step** list box select the number of the Routing Table step you want to send callers to.
- 8 Click the **Submit** button.
The Goto step appears in the Routing Table list.
- 9 Click the **Close** button to return to the Skillset List page.

Adding a Transfer step

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Day** or the **Night** link for the skillset you want to add a Transfer step to.
The Day or the Night Routing Table page appears.
- 5 Click the **Insert** link for the step you want to add a Transfer step to.
The Routing Step page appears.
- 6 Select where you want to transfer the call to:
 - if you want to transfer the call to an extension, select **Transfer to Extension** and enter the extension
 - if you want to transfer the call to a mailbox, select **Transfer to mailbox** and enter the mailbox number
 - if you want to transfer the call to an external number:
 - select **Transfer to external** and enter the external number
 - from the **Outdial Method** list box select **Line, Pool** or **Route**
 - if you select Line or Pool, in the **Line/Pool#** box enter the line or line pool number
 - if you want to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant**
 - if you want to transfer the call to the operator, select **Transfer to Operator**
 - if you want to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to.



Note: You or the System Administrator must set up a CCR Tree before callers can transfer to it. For how to set up a CCR Tree, refer to the *CallPilot Manager Set Up and Operation Guide*.

- 7 Click the **Submit** button.
The Transfer step appears in the Routing Table list.
- 8 Click the **Close** button to return to the Skillset list.

Adding a Disconnect step

Disconnect steps release a call from the skillset it is in. If the first step in a routing table is a Disconnect step, Call Center does not answer the line.

To add a disconnect step

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillsets List page appears.
- 4 Click the **Day** or the **Night** link for the skillset you want to add a disconnect step to.
The Day or the Night Routing Table page appears.
- 5 Click the **Insert** link for a step in the routing table.
The disconnect step is added before this step. To add the disconnect step to the end of the routing table, click the **Insert** link for the End step. If the Routing Table is full the End step does not appear.
The Routing Step page appears.
- 6 Click the **Disconnect** option.
- 7 Click the **Submit** button.
The Disconnect step appears in the Routing Table list.
- 8 Click the **Close** button to return to the Skillset List page.

Assigning Routing Table hours of operation

To assign the routing table hours of operation for each day of the week, you set the start times for the Day and Night Routing Tables for each skillset. The start times determine which routing table is used for the skillset.

You can also leave the default as 24 hour operation. If you select 24 hour operation, the skillset uses the Day Routing Table only for that day.

To assigning hours of operation to a skillset

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.

Skillset List										
Skillset	Name	CDN	Status	Commands						
1	Documentation	223	Enabled	Properties	Agents	Day	Night	Service Mode	Overflow	Disable
2	Testing	224	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
3	Alt Lang Testing	225	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
4	Calgary	226	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
5	Ottawa	227	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
6	Santa Clara	228	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
7	Vancouver	229	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable Unconfigure
8	unused	---	--	Configure						
9	unused	---	--	Configure						
10	unused	---	--	Configure						

- 4 Click the **Service Mode** link for the skillset you want to set up.
The Skillset Service Mode page appears.

Skillset Service Mode			
Skillset:	7		
	24 hr Service	Day Start Time (hh:mm - 24 Hour Format)	Night Start Time (hh:mm - 24 Hour Format)
Monday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Tuesday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Wednesday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Thursday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Friday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Saturday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Sunday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
		<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>




- 5 For each day of the week set the hours of operation for the skillset:
 - to have the skillset operate in 24 hour mode, leave the **24 hr Service** check box selected for that day
 - to set the start time for the Day Routing Table, in the **Day Start Time** box enter the start time in 24 hour format
 - to set the start time for the Night Routing Table, in the **Night Start Time** box enter the start time in 24 hour format
- 6 Click the **Submit** button.

Setting the Service Mode for skillsets

You must set the Service Mode the skillset uses so that calls are answered correctly.

Before you set the Service Mode you must:

- configure a skillset
- set up at least a Day Routing Table for the skillset


The default Call Center Service Mode is 24 hour operation. You can change the hours of operation using the Operator Feature Code ( 9  8  2). There are six possible Service Modes:














Auto	The skillset uses the Automatic Service Mode. You must configure both the Day and Night Routing Tables before you can assign the Auto Service Mode to the skillset.
Day	The skillset uses the Auto Service mode and the Day Routing Table. You must configure the Day Routing Table before you can assign the Auto Service Mode and the Day Routing Table.
Night	The skillset uses the Manual Service mode and the Night Routing Table. You must configure the Night Routing Table before you can assign the Auto Service Mode and the Night Routing Table.
24 Hour	The skillset uses the Day Routing Table only. You must configure the Day Routing Table for 24 hour operation to use this Service Mode.
Uninit	The skillset is not configured. You must configure the skillset before you can assign a Service Mode.
Invalid	You have only partially configured the skillset. You cannot enable this skillset.




Note: If you originally configure the skillset with a Day Routing Table only and enable the skillset, Call Center will recognize the Service Mode as Day. Afterwards, if you add a Night Routing Table, Call Center still recognizes the Service Mode as Day. You must set the Service Mode to Auto to get Call Center to function in the Auto Service Mode.

To set the Service Mode for a skillset

Pswd:
RETRY  OK

- 1 Press  9  8  2 .
Enter the default Operator password  6  7  3  7  2  8  6  7 ,
(Operator) and press  OK
or
if you changed the default Operator password, enter the new password and press  OK.

Choose option
OPER  MODE

- 2 Press  MODE.

Call Center
Service

- 3 This display appears briefly.

```
Mode 1: Auto
CHNG  VIEW  NEXT
```

- 4** The display shows the Service Mode for skillset 1. In this example, skillset 1 is in Auto mode. Press **CHNG** if you want to change the Service Mode to Day or Night or press **VIEW** if you want to view the details for the Service Mode or press **NEXT** if you have a Day Routing Table for skillset 2.

```
Mode 2: Day
CHNG  NEXT
```

- 5** The display shows the Service Mode for skillset 2. In this example, skillset 2 is in Day mode. Press **CHNG** if you want to change the Service Mode to Day or Night or press **NEXT** to view the next skillset.

While you view the skillsets, you can press:

- **1** and then enter the skillset number to view a specific skillset. If you use Basic Call Center you have 2 skillsets. If you use Professional Call Center you have 50 skillsets.
 - If you want to view a skillset from 1 - 9, enter the skillset number and then press **OK**.
 - If you want to view a skillset from 10 - 50, just enter the number of the skillset.
 - If you want to return to the previous display press **QUIT**.
 - If you want to re-enter the skillset number, press **RETRY**.
- **4** to view the previous skillset.
- **3**, **6**, **#** or **NEXT** to view the next skillset
- ***** to exit

- 6** The session ends when you press ***** or **END**.



Note: Remember to manually choose the Day Routing Table or the Auto Service Mode when your business returns to regular hours.

Example of a Day Routing Table

To set up the routing table steps is shown in “[Example of Day Routing Table steps](#)”, follow the procedure “[To set up the Day Routing Table example](#)”.

Example of Day Routing Table steps

Step number	Type of step	Step parameters
1	Greeting	Greeting 1, information greeting Forced Transfer none enabled
2	Distribute for	1:00 (one minute)
3	Greeting	Greeting 2, general company greeting Not forced play Intelligent Call Input Routing, Basic with defaults
4	Distribute for	Accept default - distribute for 00:30 (thirty seconds)
5	Greeting	Greeting 3, please wait greeting Not forced play Intelligent Call Input Routing, Basic with operator default
6	Goto	Routing Table step 2

To set up the Day Routing Table example

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List link appears.
- 4 Click the **Day** link for Skillset 1.
The Day Routing Table page appears.
- 5 Click the **Insert** link.
The Routing Step page appears.
Greeting 1 is assigned by default.
- 6 Select the **Forced Play** check box.
- 7 At the **Intelligent Caller Input Routing** option select **None**.
- 8 Click the **Submit** button.
The Greeting step appears as step 1 in the Day Routing Table list.
- 9 Click the **Insert** link for the **End** step.
The Routing Step page appears.
- 10 Click the **Distribute for** option.

- 11** In the **Distribute for** box enter the time **01:00**.
- 12** Click the **Submit** button.
The Distribute For step appears as step 2 in the Day Routing Table list.
- 13** Click the **Insert** link for the **End** step.
The Routing Step page appears.
The Greeting option is selected by default.
- 14** In the **Greeting** box type **2**.
- 15** At the **Intelligent Caller Input Routing** option, select **Basic**.
The Auto-Attendant, Operator, Skillset Mailbox and CCR check boxes are selected by default.
The default DTMF digits for each destination are shown.
- 16** Click the **Submit** button.
The Greeting step appears as step 3 in the Day Routing Table page.
- 17** Click the **Insert** link for the **End** step.
The Routing Step page appears.
- 18** Select the **Distribute for** option.
The default time of 00:30 is shown in the Distribute for box.
- 19** Click the **Submit** button.
The Distribute for step appears as step 4 in the Day Routing Table list.
- 20** Click the **Insert** link for the **End** step.
The Routing Step page appears.
Greeting is selected by default.
- 21** In the **Greeting** box type **3**.
- 22** At the **Intelligent Caller Input Routing** option select **Basic**.
- 23** Clear the **Auto-Attendant**, **Skillset Mailbox** and **CCR** check boxes so that just the **Operator** check box is selected.
- 24** Click the **Submit** button.
The Greeting step appears as step 6 in the Day Routing Table list.
- 25** Click the **Insert** link of the **End** step.
The Routing Step page appears.
- 26** Select the **Goto step** option.
- 27** From the **Goto step** list box select **2**.
- 28** Click the **Submit** button.
The Goto step appears as step 6 in the Day Routing Table list.
- 29** Click the **Close** button to return to the Skillset List page.

Example of a Night Routing Table

To set up the routing table steps shown in “[Example of Night Routing Table steps](#)”, follow the procedure “[To set up the Night Routing Table example](#)”.

Example of Night Routing Table steps

Step number	Type of step	Step parameters
1	Greeting	Greeting 6, non-business hours greeting Not forced play Intelligent Call Input Routing, Basic
2	Disconnect	There are no parameters for the Disconnect option.

To set up the Night Routing Table example

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Night** link for Skillset 1.
The Night Routing Table page appears.
- 5 Click the **Insert** link.
The Routing Step page appears.
The **Greeting** option is selected by default.
- 6 In the **Greeting** box, type **6**.
- 7 At the **Intelligent Caller Input Routing** option, select **Basic**.
- 8 Click the **Submit** button.
The Greeting step appears as step 1 in the Night Routing Table list.
- 9 Click the **Insert** link for the **End** step.
The Routing Step page appears.
- 10 Select the **Disconnect** option.
- 11 Click the **Submit** button.
The Disconnect step appears as step 2 in the Night Routing Table list.
- 12 Click the **Close** button to return to the Skillset List page.

Changing a Routing Table

You must disable a skillset before you can change its routing table.
For how to disable a skillset refer to [“Disabling a skillset” on page 55](#).

To	Follow the procedure
Insert steps	“Adding a Greeting step” on page 124 “Adding a Distribute for step” on page 127 “Adding a Goto step” on page 128 “Adding a Transfer step” on page 129 “Adding a Disconnect step” on page 130
Review steps	“Reviewing Routing Table steps” on page 138
Modify steps	“Modifying Routing Table steps” on page 138
Delete steps	“Deleting Routing Table steps” on page 139

Reviewing Routing Table steps

You can review the steps for enabled skillsets.

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Day** or **Night** link for the skillset whose routing table steps you want to review.
The Day or Night Routing Table page appears.
- 5 Click the **View** link to view the steps.
- 6 After you review the steps, click the **Close** button.

Modifying Routing Table steps

You must disable a skillset before you can modify its routing table steps.
For how to disable a skillset refer to [“Disabling a skillset” on page 55](#).

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** heading.
The Skillset List page appears.
- 4 Click the **Day** or the **Night** link for the skillset with the routing table you want to change.
The Day or the Night Routing Table page appears for the skillset.

- 5 Click the **Modify** link for the step you want to change.
The Routing Step page appears.
- 6 Make the changes you want to the routing table step.
- 7 Click the **Submit** button.
The changed step appears in the Routing Table list.
- 8 Click the **Close** button to return to the Skillset List page.

Deleting Routing Table steps

You must disable a skillset before you can delete its routing table steps.
For how to disable a skillset refer to [“Disabling a skillset” on page 55](#).

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Skillset List** link.
The Skillset List page appears.
- 4 Click the **Day** or the **Night** link for the skillset with the step you want to delete.
The Day or the Night Routing Table page appears for the skillset.
- 5 Click the **Delete** link for the step you want to delete.
A message appears that asks you to confirm the deletion.
- 6 Click the **OK** button.
The step is deleted from the Routing Table list.
- 7 Click the **Close** button to return to the Skillset List page.

Creating Caller Input Rules

If you use Professional Call Center, you can create Caller Input Rules that route calls to other skillsets or locations based on caller multi-digit DTMF input. Caller Input Rules let you identify callers depending on what kind of services your call center has. For example, callers can enter a passcode to access a special service line. Refer to [“An example of using Intelligent Caller Routing, Advanced” on page 144](#) for an example of how to use Caller Input Rules in your call center.

You can create up to 2,000 Caller Input Rules for each table. Each rule has a Match String, and an Action. The Match String is the string of digits that is checked, and the Action is the routing applied to calls that match the rule. The list of Caller Input Rules is sorted numerically by Match String. If strings overlap, longer, more-specific strings appear before shorter, less-specific strings.



Note: When you record the greetings you want to use for Caller Input, include that the caller must press after they enter their input. For example, *“If you have a personal identification number, please enter it now, followed by the # key.”*

To create a Caller Input Rule

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Caller Input Rules** link.
The Caller Input Rules Tables page appears.

Caller Input Rules Tables		
Table ID	Length	Commands
1	6	Change Rules Clear
2		Change
3	4	Change Rules Clear
4		Change
5		Change
6		Change
7	2-4	Change Rules Clear
8	3	Change Rules Clear
9	3-5	Change Rules Clear

- 4 Click the **Change** link for the Caller Input Rules Table you want to add a rule to. The Rule Table Properties page appears.

Rule Table Properties

Rule Table: 1

Length:

Fixed:

Variable: to

- 5 Select **Fixed** or **Variable**, depending on whether you want to create a rule that applies to a dialstring of a fixed or variable length:
- If you select **Fixed**, in the **Fixed** box enter the number of digits allowed. The fixed length can be from 1 to 50 digits.
 - If you select **Variable**, in the **Variable** boxes type the minimum to the maximum range of caller input digits. The minimum value must be 1 or greater. The maximum value must be anything greater than the minimum value, up to 50.
- 6 Click the **Submit** button. You return to the Caller Input Rules Tables page.
- 7 Click the **Rules** link for the table you want to create a rule for. The Match Table page appears.

Match Table

Rule Table: 1

Match String	Action	Commands
		<input type="button" value="Add"/>

- 8 Click the **Add** button.
The Match Rule Setup page appears.

Match Rule Setup

Rule Table 2

Match String:

Action:

Move to Skillset:

Send to Skillset Mailbox

Transfer to Extension:

Transfer to Mailbox:

Transfer to External:

Outdial Method: (Line/Pool #)

Transfer to Auto Attendant

Transfer to Operator

Transfer to CCR:

Change Call Priority Only

New Call Priority:

- 9 In the **Match String** box type the string you want to match.
You can use # and * as wildcard characters.
For information on using wildcard characters refer to [“Using wildcard characters”](#) on page 144.
- 10 Select an action for how you want to route the call:
- if you want to transfer the call to another skillset:
 - select **Move to Skillset**
 - from the list box select the number of the skillset you want to transfer the call to.
 - if you want to change the priority of the call, select a number between 1 and 20 from the **New Call Priority** list box. The default is 10.
 - if you want to transfer the call to the skillset mailbox, select **Send to Skillset Mailbox**
 - if you want to transfer the call to an extension, select **Transfer to Extension** and in the box type the extension number you want to transfer the call to
 - if you want to transfer the call to a mailbox, select **Transfer to Mailbox** and in the box type the mailbox number you want to transfer the call to
 - if you want to transfer the call to an external number:
 - select **Transfer to External**
 - in the box type the number you want to transfer the call to
 - from the **Outdial Method** list box select an outdial method

- if you select Line or Pool, in the **Line/Pool#** box type the line or line pool number used
- if you want to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant**
- if you want to transfer the call to the operator, select **Transfer to Operator**
- if you want to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to



Note: You or the System Administrator must set up a CCR Tree before callers can transfer to it. For how to set up a CCR Tree, refer to the *CallPilot Manager Set Up and Operation Guide*.

- if you want the call to remain in its skillset but you want to change the call's priority within the skillset, select **Change Call Priority Only** and from the **New Call Priority** list box select a priority between 1 and 20 for the call. The default is 10.
- 11** Click the **Submit** button.
The rule you created appears in the Match Table.
Repeat steps 8 through 11 if you want to add another rule to the table
or
click the **Close** button to return to the Caller Input Rules Tables page.

Using wildcard characters

You can use the wildcard characters # and * in the match string:

- # matches any single digit
- * matches zero or more digits

When you use the * wildcard character:

- it can appear only once in a match string
- it can appear only at the end of a match string
- it cannot be the only character in a match string

Some examples of using wildcard characters in the match string:

1111##	Matches all account numbers 111100 to 111199
#####	Matches a credit card number with the correct number of digits
#*	Matches all valid input greater than 1 character

An example of using Intelligent Caller Routing, Advanced

The call center of Bridgestone Computers uses Intelligent Caller Routing, Advanced and Caller Input Rules to give some callers access to a special service line. Bridgestone Computers uses Professional Call Center, which gives them Intelligent Caller Routing, Advanced functionality.

Customers who purchase equipment that is under warranty have an eight-digit personal identification number. When they call Bridgestone Computers' service line and enter their personal identification number, their call receives priority handling in the call center.

Here is how their call is handled:

- 1 The caller hears the greeting for the service line, which includes *"If you have a personal identification number, please enter it now, followed by the # key."*
- 2 The caller enters their personal identification number.
- 3 If the caller enters their number incorrectly, the greeting can be repeated as many as three times, which is the number of retries the Call Center Administrator has set for Retries in Intelligent Caller Routing, Advanced.
- 4 If the caller enters their number correctly, Call Center compares the caller's personal identification number with the Match String in the rules for Rules Table 1.
- 5 For Rules Table 1, the Call Center Administrator created a rule of a fixed length of eight digits because all personal identification numbers are eight digits long.

- 6** The Call Center Administrator created three rules for Rules Table 1:
 - rule 4709####. Customers with servers have a personal identification number that begins with 4709
 - rule 5709####. Customers with desktop computers have a personal identification number that begins with 5709
 - rule 6709####. Customers with laptop computers have a personal identification number that begins with 6709
- 7** The callers' personal identification number is 67095233, which matches the rule for laptop computers.
- 8** The Call Center Administrator set up the rules in Rules Table 1 with these Actions:
 - a match for 4709#### sends callers to skillset 1 (servers) and changes the call priority to 1
 - a match for 5709#### sends callers to skillset 2 (desktops) and changes the call priority to 1
 - a match for 6709#### sends callers to skillset 3 (laptops) and changes the call priority to 1
- 9** The call enters skillset 3. Skillset 3 is the priority service skillset for laptops.

Changing a Caller Input rule

You can change a caller input rule at any time. If you want to change the length for the rules in a Caller Input table, refer to [“To change the rule length for a Caller Input Table” on page 146](#). If you want to change a specific rule in a table, refer to [“To change a Caller Input Rule” on page 146](#).

To change the rule length for a Caller Input Table

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Caller Input Rules** link.
The Caller Input Rules Tables page appears.
- 4 Click the **Change** link for the table you want to change.
The Rule Table Properties page appears.
- 5 Make the appropriate change to the length. Select **Fixed** or **Variable**, depending on whether you want to create a rule that applies to a dialstring of a fixed or variable length:
 - If you select **Fixed**, in the **Fixed** box enter the number of digits allowed.
The fixed length can be from 1 to 50 digits.
 - If you select **Variable**, in the **Variable** boxes type the minimum to the maximum range of caller input digits. The minimum value must be 1 or greater. The maximum value must be anything greater than the minimum value, up to 50.
- 6 Click the **Submit** button.

To change a Caller Input Rule

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Caller Input Rules** link.
The Caller Input Rules Tables page appears.
- 4 Click the **Rules** link for the table that has the rule you want to change.
The Match Table page appears.
- 5 Click the **Change** link for the rule you want to change.
The Match Rule Setup page appears.
- 6 Make the changes you require to the Match String or Action.
- 7 Click the **Submit** button.
The Match Table page appears with the changed rule.
- 8 Click the **Close** button to return to the Caller Input Rules Tables page
or
repeat steps 5 through 7 to change another rule.

Deleting a Caller Input rule

You can delete a Caller Input rule at any time.

To delete a Caller Input rule

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Caller Input Rules** link.
The Caller Input Rules Tables page appears.
- 4 Click the **Rules** link for the table with the rule you want to delete.
The Match Table page appears.
- 5 Click the **Delete** link for the rule you want to delete.
A message appears that asks you to confirm the deletion.
- 6 Click the **OK** button.
The rule is deleted from the Match Table list.
- 7 Click the **Close** button to return to the Caller Input Rules Tables page.

Clearing a Caller Input Rule Table

If you clear a Caller Input Rule Table, you delete all the rules and rule length information from the table.

To clear a Caller Input Rule Table

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **Caller Input Rules** link.
The Caller Input Rules Tables page appears.
- 4 Click the **Clear** link for the table you want to clear.
A message appears that asks you to confirm the deletion.
- 5 Click the **OK** button.

Chapter 10

Line administration

Before Call Center can answer an incoming line, you must assign the line to be answered by a Call Center skillset. Refer to [“A comparison of Basic and Professional Call Center” on page 13](#) for information on how many lines you can configure for your call center. The line numbers can be any line number from 1 to 500.

For each line that you want Call Center to answer, you assign:

- the line to be answered by Call Center
- the skillset that calls on this line go to
- the number of rings before the line is answered

You can record your line answering information in the table [“Line answering” on page 191](#).

Configuring lines

You must disable a skillset and wait until there are no calls in the skillset before you can add lines to it. You cannot add lines to a skillset while it is in use.



Note: Target lines that are assigned to a B2 skillset cannot have their prime extension programmed as the Control DN of the skillset. This is restricted by the software. The recommended setting for these lines is blank.

For information on how to program the prime extension, refer to the *Business Communications Manager Programming Operations Guide* or the *Norstar System Coordinator Guide*.

Lines that are programmed to be answered by Call Center must not be programmed to be answered by another peripheral or application.

To delay calls being answered, you can assign Call Center to answer incoming calls after a specified number of rings. The number of rings ranges from zero to 12. If the number of rings is zero, Call Center answers immediately.

For lines equipped with Caller ID, you must set the number of rings to two or more. Caller ID information is not provided until just prior to the second ring, so if you set the number of rings to zero or one, Caller ID information is not relayed.

Long distance charges start when a call is answered by Call Center. To minimize long distance charges, set the ring count higher than 0 so that calls spend more waiting time in a ringing state.

To configure a line

- 1 Start CallPilot Manager.
- 2 Click the **Auto-Attendant** heading.
The Lines Administration page appears.

Lines Administration				
Line	Answer Mode	Table/Skillset	Rings	Command
1	Auto-Attendant	Table 1	3	Change
2	Auto-Attendant	Table 1	3	Change
3	Auto-Attendant	Table 1	3	Change
4	Auto-Attendant	Table 1	3	Change
5	Auto-Attendant	Table 1	3	Change
6	Call Center	Skillset 1	3	Change
7	Call Center	Skillset 1	3	Change
8	Call Center	Skillset 1	3	Change
9	Call Center	Skillset 1	3	Change
10	Call Center	Skillset 1	3	Change
11	No	---	0	Change
12	No	---	0	Change

- 3 Click the **Change** link for the line you want to assign to a skillset.
The Line Properties page appears.

Line Properties	
Line Number:	11
Answer Mode:	<input type="text" value="Call Center"/>
Table/Skillset Number:	<input type="text" value="1"/>
Number of Rings:	<input type="text" value="0"/>
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

- 4 From the **Answer Mode** list box, select **Call Center**.
- 5 In the **Table/Skillset Number** box type the number of the skillset you want to answer this line.
- 6 From the **Number of rings** box select the number of rings before Call Center answers.
You must select a number from 0 to 12.
- 7 Click the **Submit** button.

Configuring several lines

- 1 Start CallPilot Manager.
- 2 Click the **Auto-Attendant** heading.
- 3 Click the **Change Many Lines** link.
The Change Many Lines page appears.

Change Many Lines

Line Range: (1-500)
From: To:

Answer Mode:

Table/Skillset Number:

Number of Rings:

- 4 In the **From** box type the number of the first line to add.
- 5 In the **To** box type the number of the last line to add.
- 6 From the **Answer Mode** list box select **Call Center**.
- 7 In the **Table/Skillset Number** box type the number of the skillset you want to answer these lines.
- 8 From the **Number of rings** list box select the number of rings before Call Center answers.
You must select a number from 0 to 12.
- 9 Click the **Submit** button.

Setting the Answer Lines status

The Answer Lines status determines whether Call Center answers the assigned lines. If the Answer Line status is set to Yes, Call Center answers the lines assigned as Call Center and CallPilot answers the lines assigned as AA. If the Answer Line status is set to No, neither Call Center nor CallPilot answers lines.

To set the Answer Lines status

```
Pswd:
RETRY      OK
```

- 1 Press .
Enter the Operator password, and then press OK.

```
Choose option
OPER      MODE
```

- 2 Press OPER.

```
Atdt avail: N
CHNG      NEXT
```

- 3 Press NEXT

```
Business open: N
CHNG      NEXT
```

- 4 Press NEXT.

```
Answer lines? N
CHNG      NEXT
```

- 5 Press CHNG.
If you set Answer Lines to N the display shows Disabling...
If you set Answer Lines to Y the display shows Enabling...

- 6 Press to end the session.

Chapter 11

Setting up Call Center general properties

Setting up Call Center includes assigning the language and setting up general Call Center properties.

You can generate a System Configuration Report to see a snapshot of your Call Center settings.

You can enable Software Authorization Codes if you want to increase the number of agents at your call center or enhance your call center with options such as Multimedia Call Center.

Assigning the Call Center language

The languages available for Call Center are the languages that are available for CallPilot. If you change the Call Center language, you also change the CallPilot language.

To assign the Call Center language

- 1 Start CallPilot Manager.
- 2 Click the **Configuration** heading.
- 3 Click the **System Properties** link.
The System Properties page appears.

System Properties

Voice Mail Version:	4.8.38
Max Outcalling Channels:	<input type="text" value="1"/>
Enable Voice Mail:	<input checked="" type="checkbox"/>
Enable Group List:	<input checked="" type="checkbox"/>
Group List Leading Digit:	<input type="text" value="9"/>
Enable External Initialization:	<input type="checkbox"/>
Make Directory Available:	<input checked="" type="checkbox"/>
Enable General Delivery Mailbox:	<input checked="" type="checkbox"/>
Enable Redirect DN:	<input type="checkbox"/>
Enable Bilingual:	<input type="checkbox"/>
Primary Language:	<input type="text" value="English (North American)"/>
Alternate Language:	<input type="text" value="English (North American)"/>
Canadian Pronunciation:	<input type="checkbox"/> (for North American English only)
Directory Search By:	<input type="text" value="Last Name"/>
Enable CallPilot User Interface:	<input checked="" type="checkbox"/>
Name Prefix:	<input type="text" value="11"/>
Special Prefix:	<input type="text" value="19"/>
Primary UI Style:	<input type="text" value="NVM"/>

- 4** If you want to use a Primary and an Alternate language, select the **Enable Bilingual** check box. If you clear this check box alternate language prompts are not available.
Disabling bilingual operation affects:

 - language designations for Automated Attendant greetings
 - voice prompt selections for callers who use the Automated Attendant
 - voice prompt selections for callers who transfer to mailbox greetings
- 5** Select a primary language from the **Primary Language** list box.
Prompting for the Automated Attendant and CCR Trees occurs in this language.
- 6** Select an alternate language from the **Alternate Language** list box.
The alternate language cannot be the same as the primary language.
- 7** Select the **Canadian Pronunciation** check box if you want voice prompts that include the letter "z" to be pronounced "zed" instead of "zee". The Canadian Pronunciation check box appears only if North American English is the primary or alternate language.
- 8** Click the **Submit** button.

General Call Center properties

When you set up Call Center you must assign values for the general properties. The general Call Center properties are:

Primary and Secondary alert times

Alert times are time limits for calls waiting in skillsets. The Secondary alert time must be a greater than the Primary alert time. You can have Primary and Secondary alerts for all the calls in the call center, or for just the calls waiting in skillsets that you are logged on to.

If a call exceeds the Primary alert time:

- a memory button indicator programmed with Display Waiting Calls (☎ 9 0 9) flashes slowly. ☎ 9 0 9 flashes based on the status of all the calls in the call center.
- a memory button indicator programmed with Agent Login (☎ 9 0 4) flashes slowly. ☎ 9 0 4 flashes based on the status of the calls for the skillsets an agent is logged on to.

If a call exceeds the Secondary alert time:

- a memory button indicator programmed with Display Waiting Calls (☎ 9 0 9) flashes quickly. ☎ 9 0 9 flashes based on the status of all the calls in the call center.
- a memory button indicator programmed with Agent Login (☎ 9 0 4) flashes quickly. ☎ 9 0 4 flashes based on the status of the calls for the skillsets an agent is logged on to.

A slowly flashing indicator alerts you that a call has exceeded the Primary alert time. A quickly flashing indicator alerts you that a call has exceeded the Secondary alert time. The indicator stops flashing when the calls are handled.

You assign alert times in minutes and seconds. There is no default value for alert times.

For how to program a memory button, refer to [“Programming a memory button with a Feature Code” on page 26](#).



Note: Agents do not have to be logged on to see the Display Waiting Calls memory button flashing. A memory button must be programmed with the Display Waiting Calls Feature Code and the Primary alert time must be set up for the memory button to show waiting calls status.

Reserved channels

Reserved channels are voice channels that are reserved for use by Call Center. If you reserve channels you ensure that callers are played skillset announcements, and CallPilot does not use all of the voice channels.

A reserved channel is used when:

- a Call Center greeting plays to a caller
- Off-premise Message Notification notifies you that there is a message in a skillset mailbox

Master Client Address

The Master Client Address is the address where the real time data stream for Call Center Reporting purposes is delivered. You must enter either the host name or the IP address of the computer that is running the Call Center Reporting Master Client.

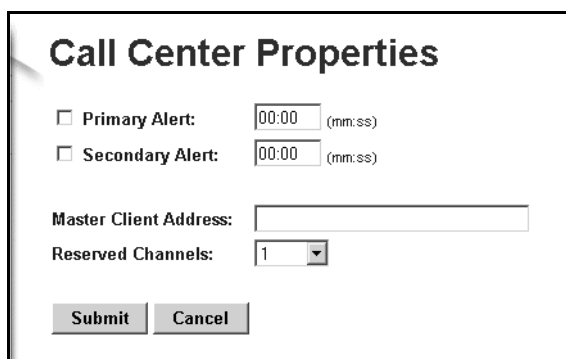
The Master Client Address appears only if you use Call Center Professional on a Business Communications Manager 3.0 system, or if you have purchased and enabled the Call Center Reporting Software Authorization Code. Contact your service representative if you are interested in the Call Center Reporting Software Authorization Code.

Setting up general Call Center properties

For information about the general Call Center properties refer to [“General Call Center properties” on page 155](#).

To set up the general Call Center properties

- 1 Start CallPilot Manager.
- 2 Click the **Call Center** heading.
- 3 Click the **General Properties** link.
The Call Center Properties page appears.



The screenshot shows a web form titled "Call Center Properties". It contains the following fields and controls:

- Primary Alert:** followed by a text input field containing "00:00" and "(mm:ss)" to its right.
- Secondary Alert:** followed by a text input field containing "00:00" and "(mm:ss)" to its right.
- Master Client Address:** followed by a single-line text input field.
- Reserved Channels:** followed by a dropdown menu showing the number "1".
- At the bottom, there are two buttons: "Submit" and "Cancel".

- 4 To enable the Primary Alert, select the **Primary Alert** check box and enter the Primary Alert time.
- 5 To enable the Secondary Alert, select the **Secondary Alert** check box and enter the Secondary Alert time. The Secondary Alert time must be greater than the Primary Alert time.
- 6 If you use Call Center Reporting, in the **Master Client Address** box type the host name or IP address of the computer running the Call Center Reporting Master Client. The Master Client Address box is available only if you use Call Center Reporting.
- 7 From the **Reserved Channels** list box select the number of voice channels you want to reserve for Call Center.
- 8 Click the **Submit** button.

System Configuration Report

The System Configuration Report includes information about Call Center configuration.

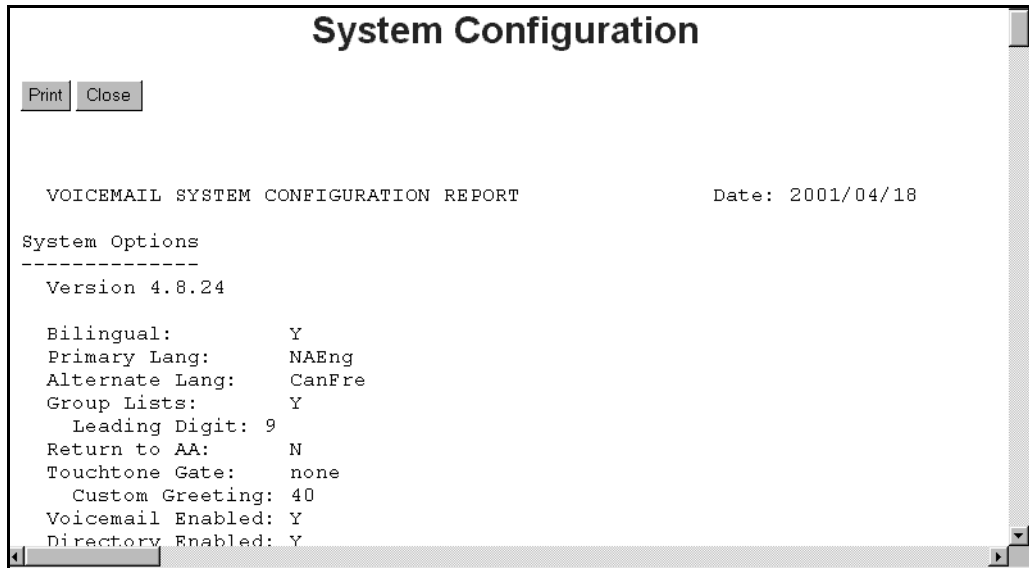
The Call Center information in the System Configuration Report:

Call Center Parameters	Lists the current Call Center general parameters.
Voice Button Properties	<ul style="list-style-type: none"> • whether Voice Button (Multimedia Call Center) is enabled or disabled • Server Address • Server Port
Call Center agents	<p>Lists for each agent:</p> <ul style="list-style-type: none"> • Agent ID • Agent name • Priority • Skillsets assigned • Automatic answer • Call type • Missed call • Supervisor status
Call Center skillsets	<p>Lists for each skillset:</p> <ul style="list-style-type: none"> • Skillset ID • Skillset Name • Control DN • Message Waiting Indicator extension • Method of Call Distribution • Not Ready time • Delay answer time
Call Center Routing Tables	<p>Lists for each skillset:</p> <ul style="list-style-type: none"> • Skillset number • Day Routing Table start time • Night Routing Table start time • Day Routing Table steps • Night Routing Table steps
Call Center overflow	<ul style="list-style-type: none"> • Skillset number • Skillset name • Enabled or disabled • Rule • Service Mode • Conditions • Actions
Call Center Greetings	<p>Lists for each call center greeting:</p> <ul style="list-style-type: none"> • Greeting number • Status (whether the greeting is recorded) • Skillsets that use the greeting

Call Center Intelligent CLID/ DNIS Routing	<ul style="list-style-type: none"> • Line • CLID/ANI number • DNIS number • Action
Call Center Intelligent Caller Input Routing Tables	<ul style="list-style-type: none"> • Length of rule • Match string • Action

To generate the System Configuration Report

- 1 Start CallPilot Manger.
- 2 Click the **Reports** heading.
- 3 Click the **System Configuration** link.
The System Configuration Report appears. It can take several minutes to generate the report.



- 4 To print the report, click the **Print** button.
- 5 When you are finished printing or viewing the report, click the **Close** button.

Enabling Software Authorization Codes

You enable software authorization codes to install Call Center, to increase the number of agents at your call center, and to enhance your call center with options such as Multimedia Call Center and Call Center Reporting.



Note: If you enable the software authorization code for Call Center or Professional Call Center, you must reboot your system.

To enable a software authorization code for Business Communications Manager 3.0

- 1 Point your web browser to the URL
`http://<IP address>:6800`
where <IP address> is the IP address of Business Communications Manager 3.0.
The Business Communications Manager 3.0 Unified Manager screen appears.
- 2 Click the **Configure** button.
The Login screen appears.
- 3 In the **User ID** box type the supervisor user ID. The default user ID is *supervisor*.
- 4 In the **Password** box type the supervisor password. The default password is *visor*.
- 5 Click the **Login** button.
The Business Communications Manager screen appears.
- 6 Click the **System** key.
- 7 Click the **Licensing** heading.
The Licensing Setting screen appears.
- 8 On the **Configuration** menu click **Add a Keycode**.
The Applied Keycodes screen appears.
- 9 In the **Keycode** box type the number of the software authorization code for the option you want to install.
- 10 Click the **Save** button.
- 11 If you enable the software authorization code for Call Center or Professional Call Center, you must reboot your system by following steps 12 through 14.
If you enabled any other software authorization codes you do not have to reboot your system.
- 12 Choose **System** in the navigation tree.
The Logoff menu is enabled.
- 13 On the **Logoff** menu, click **Reboot**.
A message appears that asks you to confirm your request to reboot.
- 14 Click the **Yes** button to reboot.

To enable a software authorization code for CallPilot 150

- 1 Start CallPilot Manager.
- 2 Click the **Configuration** heading.
- 3 Click the **Installed Options** link.
The Installed Options page appears.
- 4 In the **Keycode** boxes type the software authorization code for the option you want to install.
- 5 Click the **Add** button.
The option you installed appears in the Installed Options list.
- 6 If you enable the software authorization code for Call Center or Professional Call Center, you must reboot your system by performing step 7.
If you enabled any other software authorization codes you do not have to reboot your system.
- 7 Reboot your system by removing and then reapplying power.

Chapter 12

Monitoring Call Center call activity

Monitoring call activity

There are two ways that you can monitor call activity at your call center:

- [“Monitoring agent calls with Silent Monitor” on page 163](#)
- [“Monitoring skillsets” on page 167](#)

You can monitor calls by using memory buttons that you program with the Feature Codes for monitoring:

- Display calls waiting in skillsets
- Monitor agent calls

For how to program a memory button, refer to [“Programming a memory button with a Feature Code” on page 26](#). For information about monitoring capacities refer to [“A comparison of Basic and Professional Call Center” on page 13](#).

Monitoring agent calls with Silent Monitor

You monitor calls as a Silent Monitor: when you monitor calls, you are not detected by the agent or callers. You monitor all of the calls on an agent's telephone, rather than on a call-by-call basis. When the current call is completed, the monitoring session of the agent continues. You do not have to reestablish the monitoring session.



Note: While you monitor an agent's calls you monitor all of their calls. This includes their personal calls and if they access their voicemail. Tell agents that if they make a call that they do not want monitored, they must first log off as an agent, then log on again when they complete the call.

Use to log on to Call Center and the skillsets you are assigned to, and to monitor calls. You can program a memory button with . 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.

Using Silent Monitor with Answer DN

If you have an Answer DN programmed for your main telephone, and you are using Silent Monitor from your main telephone the telephone that you have programmed as your Answer DN telephone rings briefly when:

- you monitor an agent who is not on a call, and the agent answers or places a call
- you start to monitor an agent who is on an active call
- you monitor an agent who puts a call on hold and answers another call or unholds the original call.

Use a headset to monitor calls

Use a headset rather than handsfree when you monitor calls. This ensures call privacy and reduces the office noise level. The headset must be plugged into the headset port on the bottom of the telephone. If you pick up the handset when the headset is plugged in, the handset does not work. Check with your Call Center Administrator to make sure you can use a headset with your telephone.

Monitoring tips

- More than one supervisor can log on to the same skillset.
- An agent can be monitored by only one supervisor at a time.
- While you are on a call, do not initiate a monitoring session.
- You must use a two line display telephone.
- Use a headset to monitor calls. If you use a handset you cannot join a call while you are monitoring it.



Note: You cannot monitor an agent who is:

- on a conference call
- using an Answer DN
- on an ISDN or Companion set
- on any type of call if the maximum number of conference bridges are being used

Multimedia Call Center Calls that do not have a PSTN component do not appear in Call Center Reporting.

If a Multimedia Call Center agent logs on to their set but does not log onto their computer, the agent appears as logged on to the Call Center, but does not receive any calls. To check whether agents are taking calls, you can view their view their status during a monitoring session.

Logging on and monitoring agent calls

- 1 Press **☎** **9** **0** **4**.
- 2 Enter your Agent ID number and press **OK** or **#**.
- 3 Enter your password and press **OK** or **#**.
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you enter the default password, you must change your password. Enter a new password from four to eight digits long and press **OK**. Enter your new password again and press **OK**.
- 4 Press **CHNG** until **SUPERVISOR: Y** appears. You must log on as a supervisor to monitor and participate in calls.

- 5 Press **OK** to accept supervisor status.
If you want to log on as an agent, press **CHNG** until **Supervisor: N** appears, then press **OK** to log on as an agent. If you log on as an agent, calls are routed to you but you cannot monitor calls.
- 6 Press **IN** to log on to one or more skillsets that you want to monitor. You can monitor only the agents who are logged on to the same skillset as you. If **IN** does not appear, you are already logged on to all the skillsets or there are no skillsets available.
- 7 Press **CHNG** until the skillset you want to log on to appears on the display. The skillsets that are available are the skillsets that are assigned to you. If there is only one skillset available to log on to that you are assigned to, you are automatically logged on to that skillset.
- 8 Press **OK**. The display briefly confirms the skillsets that you are logged on to.
- 9 Press **NEXT**.
- 10 Press **SUPER** to monitor an agent. Calls are not routed to you.
- 11 Press **OK** to accept the skillset shown or press **NEXT** or **PREV** to find the skillset you want to monitor.
- 12 Enter the Agent ID of the agent you want to monitor and press **OK**.
Invalid Agent appears if the agent is not assigned to you.
You can press **DIR** to find the Agent ID in the Agent directory. You can monitor any agent that is in a skillset assigned to you.
- 13 Press **INFO** to display the Agent ID number, agent name, call state and the time in minutes and seconds that the call has been in this state. Call states include Idle, Not Ready, and Break (Incall Outcall).
- 14 Press **INFO** a second time to display the Agent ID number, agent name, and monitoring options again.
- 15 Press **OBSV** to monitor an agent. At any time you can press the **CANCL** button if you want to exit the monitoring session without logging off.
If the agent has a call on hold or is on a conference call, you do not begin to monitor the agent until the agent takes the call off hold or ends the conference call.
- 16 If you want to join the call, press the **Intercom** button.
- 17 To end the monitoring session press **CANCL**.
If you want to monitor another agent in the skillset press **NEXT** until you see the agent you want to monitor, and then press **OBSV**.

About monitoring sessions

Receiving a call on your telephone	If you are monitoring an agent and you get a call on your telephone, the monitoring session ends if you answer the call. When you end your call, you can press <u>0BSU</u> to reenter the monitoring session with the agent.
Making a call while monitoring	If you make a call while you are monitoring an agent, the monitoring session ends and you must log in again to reestablish a monitoring session.
Ending a session by logging off	The session ends if you or the agent are forced to log off or if the agent logs off voluntarily.
Conference calls	If the agent puts the call into a conference call while you are monitoring the agent, for the duration of the conference call, you are disconnected from monitoring the call. When the call goes out of conference, you are automatically monitoring the call again.
On hold calls	If the agent puts a call that you are monitoring on hold, your monitoring session continues while the call is on hold. When the agent resumes the call, you are still monitoring the call. If an agent puts one call on hold and answers another call, you can monitor only the currently active call. When the agent switches back to the first call, this becomes the active call that you are monitoring.
Using VoIP telephones	Do not monitor agents who use VoIP telephones. If you monitor an agent who uses a VoIP telephone, a noticeable noise can be audible for several seconds when you begin to monitor a call.
Companion sets	You cannot monitor agents who are logged on to Companion sets.
ISDN sets	You cannot monitor agents who are logged on to ISDN (Integrated Services Digital Network) sets.
Maximum number of conference bridges	If the maximum number of simultaneous conference bridges are being used, when you try to start a monitoring session your display shows "Observe Failed".
Transferred calls	If you are monitoring an agent and they transfer a call, you do not continue to hear the call until the transferred call is answered.

Monitoring skillsets

Use 9 0 9 (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	the skillset number and the status of the skillset. The status can be Enabled, Disabled or Uninit (uninitialized).
1: 6 agents	the skillset number and how many agents are currently logged on to the skillset
1: 10 calls	the skillset number and the number of calls waiting in the skillset
1: wait 9:45	the skillset number and the longest time a call has been waiting in the skillset.

Display Waiting Calls lets you know when a skillset in your call center gets very busy. You can then ask qualified agents to log on to the busy skillset.






To monitor skillsets

- 1 Press 9 0 9.
The skillset display for skillset 1 appears.

On a one line display telephone press	On a two line display telephone press	To
	or <u>GOTO</u>	enter the number of the skillset you want to monitor
	or <u>SKILL</u>	monitor the next enabled skillset
or	or or <u>NEXT</u>	go to the next skillset
	or <u>PREV</u>	go to the previous menu
		go to the next menu
		cancel the session
		exit

An example of monitoring skillsets

In the example shown here, there are calls waiting in skillset 1. In this situation, after you monitor the skillsets, you can ask the qualified and available agents from another skillset to log on to skillset 1 until the calls in skillset 1 are handled.

- 1 Press    .
- 2 Press **NEXT** to monitor skillset 1.
In this example, skillset 1 is enabled and appears on the display first. If skillset 1 is not enabled, press **NEXT** to go to skillset 2. To monitor the next skillset, press **SKILL** at any time.
- 3 The display shows the number of agents logged on to skillset 1. Press **NEXT**.
- 4 The display shows the calls that are currently waiting to be answered by agents in skillset 1. Press **NEXT**.
- 5 The display shows that the call waiting the longest in skillset 1 has been waiting for four minutes.
- 6 Press  to end the session
or
press **NEXT** to monitor skillset 2.





```
Skill 1: Enabled
SKILL      NEXT
```

```
1: 7 agents
SKILL      NEXT
```

```
1: 2 calls
SKILL      NEXT
```

```
1: wait 4:00
SKILL      NEXT
```

Using a memory button to monitor calls waiting in skillsets

Program a memory button with     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. For how to program an memory button, refer to [“Programming a memory button with a Feature Code” on page 26](#).

- 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.

For information on setting what the wait times are refer to [“Setting up general Call Center properties” on page 157](#).

For information on Primary and Secondary alert times, refer to [“Primary and Secondary alert times” on page 155](#).

Taking some Not Ready time

If you use **[*] 9 0 8** (Not Ready), you do not receive calls. You can program a Break Time, which makes Call Center automatically wait a short time before it routes the next call to you. You use Break Time to complete any tasks, such as 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 memory button with an indicator instead of pressing **[*] 9 0 8**.

For how to program a memory button, refer to [“Programming a memory button with a Feature Code” on page 26](#). For more information about Break Time refer to [“Break Time” on page 40](#).

Using Not Ready

- 1 Press **[*] 9 0 8**. **Make Not Ready** appears on the display.
If you press **[*] 9 0 8** and **Break canceled** appears on the display, you canceled 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 When you are ready to take calls again, cancel the Not Ready feature by pressing **[*] 9 0 8**.
If **Not ready** appears, press **[*] 9 0 8** again.
Not Ready is automatically enabled if you do not answer your telephone, and if this option is configured in Call Center.

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 with a Feature Code” on page 26](#).

Logging off

Log off when you complete your shift or will be away from your telephone for an extended period.

- 1 From the display that shows your name on the top line, press **OUT**. The date and time display appears.
If **OUT** does not appear, you are not logged on to any skillsets.

Changing your supervisor password

Keep your password confidential. Change your password regularly, about every 30 days.

- 1 Press **☎** **9** **0** **4**.
- 2 Enter your Agent ID number and press **OK**.
- 3 Enter your password and press **OK**.
The default password you enter to log on for the first time, or if your password is reset, is 0000. If you use the default password you must change your password.
- 4 Press **OK** to accept supervisor status, or press **CHNG** and then **OK** to log on as an agent.
- 5 Press **IN** to log on to one or more skillsets.
If **IN** does not appear, you are already logged on to all the skillsets or there are no skillsets available.
- 6 Press **CHNG** until the skillset you want to log on to (All, or a number) appears on the display.
If there is only one skillset available to log on to that you are assigned to, you are automatically logged on to that skillset.
- 7 Press **OK**.
- 8 Press **NEXT**.
- 9 From the Supervisor display, press **ADMIN**.
- 10 Enter a new password from four to eight digits long and press **OK**.
- 11 Enter your new password again and press **OK**.
- 12 Press **☎**.

Chapter 13

Tips for operating Call Center

This chapter provides tips to improve the operation of Call Center.

Agent administration

- Agents can log on to any telephone on the system.
- Call Center has an Auto Busy Mode feature that ensures that calls do not ring indefinitely at an abandoned agent set. If an agent does not answer a call within a specified number of rings, the call returns to the skillset to be presented to another agent, and the telephone is placed into Auto Busy Mode by Call Center. The agent must manually cancel Auto Busy Mode to resume accepting calls.

Skillset administration

- If a call comes in on a line that belongs to a skillset with no available agents, the call is not answered until either the Delay Answer Time elapses or an agent becomes available for the call.

During the Delay Answer period when the caller hears ringback, the line the call comes in on still rings on the sets configured to answer this line.

If your call center has long Delay Answer Times (longer than about 10 seconds), specify to callers that their call is being tracked by Call Center. Otherwise, it is possible for callers not to understand the long ringback delay and hang up.

Call Center greetings

- Record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, waiting callers must wait longer before they hear a greeting. The longest recorded greeting for a skillset affects the frequency with which callers hear greetings. If your greeting length times vary a lot, there is a very large variance in how often callers hear greetings. Therefore it is best to keep greetings similar lengths if possible, about 20 seconds each.
- Ensure that when you record greetings that you use to transfer callers to a skillset mailbox you include in the greeting: *“To leave a message in the mailbox press zero”* (or the keypad button you designate for the skillset mailbox).

Routing Table administration

- Use Forced Play greetings sparingly. If you use Forced greetings, keep them as short as possible. Many long Forced Play greetings slows transferring calls to agents and causes unpredictable increases in distribution times. Calls in other skillsets are not affected.
- When a Forced Play greeting plays for the highest priority call in a skillset, the other lower priority calls in the skillset have to wait even if agents become available during this time. For example, the longest waiting call, which is the highest priority call, gets routed to a Forced Play greeting. Agents become available during the time that the highest priority call is played a Forced Play greeting. The result is that no calls in this skillset are routed to an agent until the Forced Play greeting is finished playing to the highest priority call. This guarantees that the highest priority call is answered before lower priority calls in the skillset.
- Ensure that an Intelligent Caller Input Routing, Basic transfers calls to a skillset mailbox if you want callers to be able to press **9** to leave a message in a skillset mailbox. Remember to explain in your greeting that the you can press **9** to leave a message in a mailbox.
- Program Intelligent Caller Input Routing, Basic to transfer calls to a skillset mailbox for Non-business hours greetings so that you do not miss any messages.
- If a Goto step follows a greeting, make a Distribution step the target for the Goto step. If you make the Goto target step after a Greeting step another Greeting step, callers hear two greetings in a row.

Call Center general parameters

- Do not assign all the available voice channels as reserved channels. Call Center can use any voice channel, but reserved channels are never used by voicemail.
- A reserved or voice channel is used when:
 - a Call Center greeting is played to a caller
 - Off-premise Message Notification notifies you of a message in a skillset mailbox

How to calculate the longest time a caller can be on hold

The formula used to calculate the longest wait time a caller can be on hold without hearing a greeting is:

$$\text{Wait Time} = \left[\left(\frac{\text{maximum calls}}{\text{voice channels}} \right) - 1 \right] \times \text{maximum greeting length}$$

where:

- **wait time** is the longest time in seconds that a caller can be on hold without hearing a greeting
- **maximum calls** is the maximum number of calls that Call Center can normally handle
 - In a call center where external calls are **not** transferred or forwarded to Call Center, the maximum number of calls is the same as the number of lines programmed to be answered by Call Center
 - In a call center where external calls **are** frequently transferred or forwarded to Call Center, the maximum number of calls is the total number of lines on the system.
For information on how calls transfer to a skillset, refer to [“How incoming calls are sent to a skillset”](#) on page 37.
- **voice channels** is the estimated number of voice channels available to Call Center
 - The minimum number of voice channels available is equal to the number of reserved channels you set up in General call center parameters. Additional channels that are not used by CallPilot can also be used. For example, even though you assign two reserved channels when you set up the General Call Center parameters, Call Center can use additional voice channels if and when they are available.
- **maximum greeting length** is the duration of the longest greeting of a skillset in seconds

Tips to improve the efficiency of Call Center

Plan for busy times:

- when you assign agents to the skillsets, assign as many qualified agents as possible to answer calls for the skillsets
- have agents log on to a skillset when it gets busy

Plan for slow times:

- for example, if agents are logged on to skillset 1 only, ensure that incoming calls to skillset 2 overflow to skillset 1. When you set up skillset parameters for skillset 2, assign a time to the Overflow parameter. Then callers can still speak to an agent.
- When no agents are logged on to any skillset, ensure that the call center greetings set up in the Routing Table have Transfers set up. If a call center greeting transfers to a skillset mailbox, callers can press **9** to leave a message in the skillset mailbox. Ensure that the greeting includes that callers can press **9** to leave a message in a mailbox. **9** is the default keypad button callers can press to transfer to the skillset mailbox. You can select a different number.

Chapter 14

Troubleshooting Call Center

This chapter contains troubleshooting information for problems that can occur while setting up and operating Call Center.

Resetting passwords

You can reset passwords if they are lost or forgotten.

To reset	refer to
the Operator password	page 175
the Call Center Administrator password	page 176
a skillset mailbox password	page 63
an agent password	page 33

Resetting the Operator password

You can reset the Operator (☎ 9 8 2) password if it is lost or forgotten.
☎ 9 8 2 is used by the receptionist, Operator and Call Center Administrator.

If you reset the Operator password it is reset to 6 7 3 7 2 8 6 7 (Operator).

To reset the Operator password using CallPilot Manager

- 1 Start CallPilot Manager.
- 2 Click the **Operations** heading.
- 3 Click the **Operator Settings** link.
The Operator Settings page appears.
- 4 Click the **Reset Operator Password** check box.
- 5 Click the **Submit** button.
The password is reset to 6 7 3 7 2 8 6 7 (Operator).

To reset the Operator password using a phone

- 1 Press .
- 2 Press .
In this example, xxx represents the CDN for skillset 1.
- 3 Enter
(Resetoperpswd) and press OK.
- 4 Press YES.
- 5 The session ends.
The Operator password is now reset to

(Operator.)

Set xxx
NEXT

Pswd:
RETRY OK

Reset Pswd?
YES NO

Exit

Resetting the Call Center Administrator password

You can reset the Call Center Administrator password if it is lost or forgotten.

To reset the Call Center Administrator password using CallPilot Manager

For how to reset the Call Center Administrator password refer to [“Call Center password access”](#) on page 20.

Agent problems

Agent log on problems

If an agent cannot log on at their phone:

- ensure the agent ID and password match
- check to see if the agent is already logged on to a different phone
- check to see if a different agent is logged on to this phone

Features that logged on agents can use

Agents logged on to a skillset must not use these features:

Call Transfer

Agents can use Transfer to transfer a call to another agent, another person such as a subject matter expert, or send the call back to a skillset. We recommend that agents use Transfer rather than Call Park or Call Pickup.

- If the agent wants to send the call to a specific agent or another person, the agent can enter the Transfer Feature Code (**☎ 7 0**) and enter the extension number.
- If the agent wants to send the call to a skillset, the agent can enter the Transfer Feature Code (**☎ 7 0**) and enter the CDN of a skillset to send the call to a skillset.
- If you are monitoring an agent and they transfer a call, you do not continue to hear the call until the transferred call is answered.

Multimedia Call Center agents do not receive Call Center voice calls, but other Call Center agents can transfer voice calls to Multimedia Call Center agents.

Call Forward

Advise agents not use Call Forward. An agent who uses Call Forward is automatically logged out or made auto busy, depending on their agent settings.

Answer DN

The only way agents should use Answer DN is if they program their portable set to be the Answer DN for their main telephone. You cannot hear calls that agents answer on their Answer DN. You can only hear calls that agents answer from the set they are logged on to. For more information about using Answer DNs with Call Center, refer to the *Business Communications Manager 3.0 Programming Operations Guide*.

If an agent uses their Answer DN telephone to answer a call that is transferred to them, Call Center does not recognize the agent as being busy, and still sends calls to the agent's main set.

Do Not Disturb

Instead of using Do Not Disturb, agents can use the Not Ready Feature Code (**☎ 9 0 8**). If agents use Do Not Disturb they are automatically logged out or made not ready.

Call Forward No Answer

When an agent's phone is on Call Forward No Answer to the voicemail extension, the number of rings for Call Forward No Answer must be less than the number of rings for Transfer Callback Timeout.

Preventing calls from ringing at an agent's set

To prevent agents who are on a Call Center call from having a second internal call ring on their phone, do one of these two things through Unified Manager:

- turn the Do Not Disturb on Busy feature on for the agent's set
- set the Call Forward on Busy feature for your set to the voicemail DN.

For information on programming any of these settings, refer to the *Business Communications Manager 3.0 Programming Operations Guide* or the *Norstar System Coordinator Guide*.

Hunt groups

Do not program an agent telephone to be a member of a Hunt Group.

Automatic Answer

Do not enable Automatic Answer for agents if your call center uses Business Series Terminal telephones. For more information about Automatic Answer refer to [“Automatic Answer” on page 29](#).

Follow-me browsing (Multimedia Call Center Agents only)

Follow-me browsing does not work with embedded Flash animations. If an agent clicks a Flash button, the image the agent sees is not displayed to the caller.

Tell agents that if the page they are sending to the caller contains Flash animations, they must tell the caller to display the page by, for example, clicking the Next button, or telling them what item to click on the page to display the next page.

Skillset problems

Problems enabling skillsets

Make sure that skillsets are assigned a valid CDN before you enable them. If you cannot enable a skillset, make sure you assigned it a valid CDN. For information about skillset CDNs refer to [“Control DN” on page 38](#).

Problems changing skillset properties

If you cannot change a skillset’s properties, there are two possible reasons:

- The call center skillset is enabled.
You must disable the call center skillset before you can change the skillset properties.
- The skillset mailbox has the wrong extension number.
Refer to [“Determining a skillset mailbox number” on page 58](#) for how to determine a skillset’s extension number. The extension number of the skillset mailbox must be the same as the Control DN of the skillset. If the skillset mailbox has the wrong extension, you cannot change the properties for a skillset mailbox.

To change a skillset mailbox CDN

- 1 Start CallPilot Manager.
- 2 Click the **Mailbox Administration** heading.
The Mailbox List page appears.
- 3 Click the **Change** link for the skillset mailbox.
The page for the skillset mailbox appears.
- 4 In the **Extension** box type the CDN of the skillset.
- 5 Click the **Submit** button.

Problems viewing skillset settings

If you use Netscape Communicator version 4.77 and not all the Call Center settings shown in this guide appear in your browser, refresh the browser by clicking the View menu and clicking Reload.

Call processing problems

To achieve the most efficient use of your call center, make sure you operate Call Center within its maximum limits. If you overload Call Center, slow or unpredictable call processing times can occur.

The Call Center maximum configuration limits are 80 active agents, 100 active calls and 50 skillsets. Although these are the configuration limits for Call Center software, we recommend that you are cautious about approaching the maximum of any of these limits. Business Communications Manager 3.0 has other services that also use its hardware and software resources.

As a guideline, we recommend that if you are approaching the limit for agents, active calls or skillsets, you keep the other two settings at about half their configurable maximum or less.

For example, if your number of active agents is between	we recommend that your maximum number of active calls is between	and your number of enabled skillsets is between
41 - 80	1 - 50	1 - 25
1 - 40	51 - 100	1 - 25
1 - 40	1 - 50	26 - 50

Chapter 15

Call Center Programming Record

For this programming task	see	on page
Record the Feature Codes used by Call Center	Feature Codes	182
Record the line information for lines answered by Call Center	Line answering	191
Record the Operator and Business Status settings	Operator/Business Status	182
Record the number of reserved channels, the Primary and Secondary Alert times and the Master Client Address	General Call Center properties	182
Record agent ID, agent name, Priority, supervisor status and skillset for each agent	Call Center agents	185
Record Control DN, skillset name, MWI ext, Method, Break Time and Delay Answer time limit	Call Center skillsets	183
Record the Intelligent Overflow Routing parameters for each skillset	Intelligent Overflow Routing	184
Record agents assigned to the skillsets	Skillset assignments	186
Record the skillset mailbox name, skillset mailbox number, MWI extension and skillset mailbox password	Skillset mailboxes	187
Record the type of step and step parameters for Day and Night Routing Tables	Routing Tables	188
Record Caller Input Rules	Caller Input Rules	189
Record CLID/DNIS Routing	Intelligent CLID/DNIS Routing	190
Record Line Answering details	Line answering	191



Note: Make copies of these pages as required.

Feature Codes

Feature code name	Dialpad buttons	Custom Feature Code
Display Waiting Calls	<input type="button" value="9"/> <input type="button" value="0"/> <input type="button" value="9"/>	<input type="button" value="9"/> ____ ____
Open Mailbox	<input type="button" value="9"/> <input type="button" value="8"/> <input type="button" value="1"/>	<input type="button" value="9"/> ____ ____
Log on/Log off	<input type="button" value="9"/> <input type="button" value="0"/> <input type="button" value="4"/>	<input type="button" value="9"/> ____ ____
Not Ready	<input type="button" value="9"/> <input type="button" value="0"/> <input type="button" value="8"/>	<input type="button" value="9"/> ____ ____
Return to skillset on No Answer		<input type="button" value="9"/> ____ ____
VoiceMail DN	<input type="button" value="9"/> <input type="button" value="8"/> <input type="button" value="5"/>	<input type="button" value="9"/> ____ ____
Operator status	<input type="button" value="9"/> <input type="button" value="8"/> <input type="button" value="2"/>	<input type="button" value="9"/> ____ ____

General Call Center properties

Number of Reserved channels	
Primary alert time limit in mm:ss	
Secondary alert time limit in mm:ss	
Master Client Address	

Operator/Business Status

Password OPERATOR (67372867)			
Receptionist or Operator available*		Y	N
Business open*		Y	N
Answer trunks		Y	N
Receptionist or Operator extension			
	Skillset Number ____	Auto	
		Manual	Day Night
Call Center Service*	Skillset Number ____	Auto	
		Manual	Day Night

* These settings are usually changed by the receptionist or Operator on a daily basis.

Call Center skillsets

Skillset parameter	Rules	Default	Skillset #
Skillset name	Maximum 16 characters	SKILLn	
Control DN (CDN)	Extension cannot be used by another telephone or peripheral		
MWI extension			
Method	Least Busy or Preferred	Least Busy	
Break Time	Enter as mm:ss minimum: 00 min 00 sec maximum: 59 min, 59 sec	00:30	
Delay answer	Enter as mm:ss minimum: 00 min 01 sec maximum: 10 min 00 sec	00:00	

Skillset parameter	Rules	Default	Skillset #
Skillset name	Maximum 16 characters	SKILLn	
Control DN (CDN)	Extension cannot be used by another telephone or peripheral		
MWI extension			
Method	Least Busy or Preferred	Least Busy	
Break Time	Enter as mm:ss minimum: 00 min 00 sec maximum: 59 min, 59 sec	00:30	
Delay answer	Enter as mm:ss minimum: 00 min 01 sec maximum: 10 min 00 sec	00:00	

Intelligent Overflow Routing

Skillset:		
Service Mode (circle one)	Conditions	Destination
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox
Day Night 24 Hour	Timer: ____:____ Agents not logged in: Y N	Move to skillset: ____ Overflow to skillset(s): _____ Send to skillset mailbox

Call Center agents

Agent ID	Agent name	Supervisor status (yes or no)	Names and #s of skillsets agent is assigned to	Priority in skillset

Skillset assignments

Skillset name and #	Agent ID and name	Priority

Routing Tables

Skillset # _____

Day or Night _____

Step #	Type of step: Greeting, Distribution, Transfer, Intelligent Caller Input Routing Basic or Advanced, Disconnect	Step parameters

Intelligent CLID/DNIS Routing

Type of call: Line, Voice Button, CLID/ANI, DNIS	Action

Glossary

AA

See *Automated Attendant*.

Agent

An agent is a person who is assigned to answer calls for one or more skillsets in your call center.

Agent ID

When you add an agent, Call Center assigns an agent ID number you use to identify the agent. The agent uses their agent ID number and password to log on when they are ready to receive calls.

Alert times

Alert times are time limits that you assign for calls waiting in skillsets. If a call exceeds the Primary or the Secondary alert time limit, a programmed memory button indicator flashes. A slow flash means that a call has exceeded the Primary alert time. A quick flash means that a call has exceeded the Secondary alert time.

Attendant

The attendant is the person who you assign to answer an extension number. The attendant can be a receptionist, operator or target attendant.

Automated Attendant (AA)

The Automated Attendant is similar to an automatic answering service. AA answers incoming calls with a Company Greeting and a menu of options. AA routes calls in response to a caller's dialpad selections. For a greater range of options and services for incoming calls, a Custom Call Routing (CCR) menu can be assigned to play instead of the Automated Attendant menu.

Automatic Answer

Automatic Answer (previously called *Force Call*) is an agent parameter that force delivers calls to an agent. If Automatic Answer is enabled, the agent hears a tone that indicates that a call is delivered. The agent is automatically in the handsfree mode.

If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must manually answer the calls.

Break Time

Break Time is a time period you set up for agents to complete paperwork or other tasks after they finish a call. After an agent completes a call, they are taken out of the skillset for this Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code.

CCR

See *Custom Call Routing*.

CDN

See *Control Directory Number*.

Call Center

Call Center receives, holds and routes calls to agents in a call center.

call center

A call center is a department or a business that uses Nortel Networks Call Center to handle numerous incoming calls. A call center typically employs several agents to answer calls.

Call Center Administrator

The Call Center Administrator sets up, and manages the day-to-day operation of a call center. The Call Center Administrator monitors the overall performance of the call center and balances the staffing according to call traffic demands.

Call Forward All Calls

This feature forwards all calls from a phone to another extension number. For example, all calls from a telephone can be forwarded to the CDN of a skillset.

Call Forward No Answer

This feature forwards unanswered calls from a phone to another extension number. A call is considered unanswered if no one answers the call before a specified number of rings.

Call Forward On Busy

This feature forwards all calls from a phone to another extension if all the lines assigned to the phone are busy.

CallPilot

CallPilot is a versatile business communications tool that you can use to:

- answer incoming calls
- offer callers a selection of options to route their calls or access information
- provide advanced voicemail, Auto Attendant and call handling capabilities

CallPilot includes voicemail, Auto Attendant, Custom Call Routing and Fax Answering features.

CallPilot also has optional features such as Fax, Call Center, Desktop Messaging and Messaging that enhance your communications. What options are available to you depends on what system you use. For more information about CallPilot, see the *CallPilot Manager Set Up and Operation Guide*.

Channel

A channel is the voice path that Call Center uses to play greetings to callers. A voice channel is also the voice path used when anyone uses a Feature Code to access Call Center.

Class of Service

The Class of Service defines the values for mailboxes.

Control Directory Number (CDN)

The Control Directory Number (Control DN or CDN) is the extension number of a Call Center skillset. The CDN is the number used to transfer calls to a skillset. The CallPilot installer is responsible for assigning a CDN to each skillset before the skillset can be enabled.

Custom Call Routing (CCR)

CCR is a routing feature that you can program to present a customized menu of single-digit choices to callers. CCR automatically answers lines with customized menus. With CCR, callers can listen to pre-recorded messages, leave a message in a skillset mailbox or transfer to an extension. With CCR you can replace Automated Attendant menus with a more sophisticated menu that offers callers a wider range of options.

Delay Answer

Delay Answer is a feature that prevents Call Center from answering calls and playing greetings when there are no agents available. When a skillset has Delay Answer activated, waiting callers hear ringback.

When a call comes in on a line for a skillset that does not have any free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever comes first.

Display Waiting Calls

Display Waiting Calls, (previously known as *Queue Status*), is a Feature Code that you and agents can use to display waiting calls and view real-time information about skillsets. The Display Waiting Calls/Skillset Status Feature Code shows:

- the skillset number and whether the skillset is enabled or disabled
- number of agents logged into the skillset
- number of calls waiting
- the longest wait time of a call

DN

DN is a Directory Number or an extension number.

Dynamic agent priority

On Business Communications Manager 3.0 agents can have a different priority depending upon which skillset they are logged on to. For example when an agent is a member of the English skillset, their priority can be 1 because they are fluent in English. The same agent can have a priority of 3 when they are logged on to the Spanish skillset and, a priority of 6 when they are logged on to the German skillset.

Greeting Table

The Greeting Table determines which recorded greeting is played and which line is answered according to the time of day.

Indicator

See *memory button indicator*.

Intelligent Caller Input Routing, Advanced

Intelligent Caller Input Routing, Advanced lets callers route their calls based on multi-digit fixed or variable rules that you create in the Caller Input Rules Tables.

Intelligent Caller Input Routing, Basic

Intelligent Caller Input Routing, Basic (Previously called *Basic Transfer*), lets callers direct their calls to an Operator, Automated Attendant, skillset mailbox, CCR Tree or internal or external number.

Intelligent CLID/DNIS Routing

CLID/DNIS Routing is the initial routing that Call Center calls encounter. The CLID/DNIS Routing you set up lets Call Center route calls quickly based on their incoming line number. Callers are routed to skillsets depending on who the caller calls, the line the call comes in on, or where the caller is calling from.

Intelligent Overflow Routing

Intelligent Overflow Routing uses routing rules you create to overflow, change the priority of, and move calls to multiple skillsets, a skillset mailbox, an internal or external number, a mailbox, a CCR Tree, the Automated Attendant or an operator.

Least Busy

Least Busy, (previously called *Longest idle*) is a method of call distribution that routes calls to the agent who has been available the longest. The other method of call distribution is Preferred.

MWI

See *Message Waiting Indication*.

Memory button indicator

Memory button indicators are the triangular-shaped indicators on a phone next to the memory buttons. Memory button indicators can be used to monitor call activity and view the Login/Logout status and the Not Ready status of agents.

Message Waiting Indication (MWI)

The Message Waiting Indication appears on a phone display as *Message for you* when there are new messages.

Message Waiting Indication extension (MWI extension or MWI DN)

For each skillset mailbox, you can assign a phone as the designated MWI extension. The Message Waiting Indication extension is an optional phone number that indicates when a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* on the phone display when there are new messages in the skillset mailbox.

Method of Call Distribution (Method)

The method of call distribution determines which of several available agents to route the call to. There are two methods of call distribution: Least Busy and Preferred. Least Busy routes calls to an agent who has been available the longest. Preferred routes calls to the agent with the highest priority (the best qualified agent).

Not Ready

Not Ready, (previously known as *Make Busy*), is a Feature Code that extends a Break Time if agents need additional time after a call to do paperwork or other tasks.

Off-premise Message Notification

Off-premise Message Notification is a feature that notifies you at a destination number when there are new or urgent messages in a skillset mailbox.

Priority

You assign a priority to each agent according to their qualifications. On Business Communications Manager 3.0 Professional, agents can have *dynamic agent priority*.

Primary alert time

The Primary alert time is the first time limit that you assign for calls waiting in skillsets. If a call exceeds the Primary alert time limit, you are given a visual warning on programmed memory button indicators. The other alert time is Secondary alert time.

Make Not Ready (Return to Skillset)

Make Not Ready (Return to Skillset), (previously known as *Auto Make Busy*) is an agent property that controls how a call is treated if an agent does not answer the call. Make Not Ready assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Automatic Logout automatically logs an agent out of their skillset if they do not answer a call.

Real time

Real time is a term for when there is very little response time between when an event occurs and when the information about the event is displayed. You can monitor the real time or current situation of agents and call activity by using the Display Waiting Calls Feature Code.

Reserved channel

Reserved channels are voice channels reserved exclusively for Call Center. Reserved channels are used to play greetings to callers waiting in a skillset. These channels ensure that CallPilot does not use all the voice channels. See also *voice channel*.

Routing Table

Routing Tables handle incoming calls for each skillset. A Routing Table determines the order of greetings and hold times for callers while they wait to be routed to an available agent.

Skillset

Skillsets, (previously called *queues*) collect and distributes calls for departments such as “sales” and “technical support”. If several calls arrive at the same time, the calls are held in a skillset where callers hear greetings and are put on hold until an agent is available.

Skillset mailbox

A skillset mailbox stores messages left by callers. The calls can be retrieved by designated agents.

Skillset name

The skillset name is a maximum of 16 characters. A skillset name is the same as the skillset mailbox name.

Supervisor

A supervisor is an agent with supervisor status. A supervisor has additional capabilities, such as the ability to monitor calls between agents and callers.

Supervisor monitor

Supervisor monitor is a feature supervisors can use to monitor or participate in calls between agents and callers.

Voice channel

A voice channel is the voice path that Call Center uses to play greetings to callers.

Index

Numerics

24 Hour Service mode, skillset 110

A

Adding

- agents to a skillset 49
- agents to Call Center 31
- multiple agents to Call Center 32

Additional Routing Steps 10

Agent

- adding multiple agents to Call Center 32
- adding to Call Center 31
- assigning to a skillset 49
- Autobusy mode 171
- changing information 33
- deleting 34
- dynamic priority 10, 13, 49
- Feature Codes 28
- listening to skillset mailbox messages 70
- logging off 35
- monitor 53, 163
- parameters 29
- resetting password 33
- Silent Monitor 163
- unassigning 52
- viewing in a skillset 53

Assigning

- Call Center language option 153
- Intelligent Overflow to a skillset 117

Attendant extension 40

Auto Attendant and Call Center 12

Automatic Answer 10

Automatic timeout 28

B

B1 DNs 38

B2 DNs 38

Basic Call Center 13

Break Time 40

Button

- memory button indicators 155
- programming a memory button 26

C

Call

- call activity, monitoring 168
- Distribution Method 197

Dynamic Priority 11

priority 11

Silent Monitor 163

Call Center

- adding agents 29, 31
- adding multiple agents 32
- Basic 13
- Call answering 150, 151
- configuration limits 15, 180
- efficiency tips 174
- Feature Codes 25
- greetings 103
- language availability 153
- maximum capacities 15, 180
- password access 20
- password, creating 20
- preventing call congestion 167
- Professional 13
- setting up general parameters 157
- skillset mailboxes 57

Call Center Administrator, resetting password 176

Call Center Reporting 14

Call Forward on Busy 178

Call Park 177

Call Pickup 177

Call Transfer 177

Caller Directed Transfer 13

Caller ID 73

CallPilot

Auto Attendant and Call Center 12

call routing 12

CCR and Call Center 12

CallPilot mailbox interface 24

CallPilot Manager 11, 14, 17

interface 19

starting 17

timeout 19

CCR and Call Center 12

CFB 178

CFNA 178

Changing

agent information 33

language 153

skillset mailbox password 62

Channels

reserved 156

- voice 156
- Character limit
 - for Off-premise Message Notification destination number 87, 88, 90, 99
- Checking the telephone mailbox interface 24
- CLID/DNIS Routing
 - ANI 44
 - CLID 44
 - DNIS 44
 - line 44
 - Multimedia Call Center 44
 - routing properties 44
- Company Directory 59
- Conference calls 164, 166
- Configuring lines 149
- Control DN 38, 57, 58, 179
 - B1 38
 - B2 38
 - skillset 38
- Conventions, guide 23
- Copying a message 71
- D**
 - Day mode, skillset 110
 - Day of Week Service 14
 - Day Routing Table, example 135
 - Default mode, skillset 110
 - Delay Answer 40
 - Delay Answer feature 171, 195
 - Deleted messages, retrieving 72
 - Deleting
 - agent 34
 - messages 71, 74
 - Destination number
 - character limit 88, 90, 99
 - for pagers 87
 - when CallPilot is behind PBX or Centrex 87
 - Destination pager number character limit 87
 - Destination, Off-premise Message Notification numbers 79
 - Determining
 - Control DN 58
 - Feature Codes 25
 - mailbox interface 24
 - Message Waiting Indication extension 58
 - skillset mailbox number 58
 - DID routing 43
 - Directory, Company 59

- Disabling a skillset 55
- Display telephone
 - entering characters 22
 - two line 21
- Display Waiting Calls Feature Code 163
- DNs, B1 and B2 38
- Dynamic agent priority 10, 13, 49
- E**
 - Enabling a skillset 54, 179
 - Erasing messages 71, 74
- F**
 - Feature 983 telephone administration 14
 - Feature Codes 25
 - about 25
 - agent 28
 - Custom Feature Codes 28
 - descriptions 27, 28
 - determining 25
 - Display Waiting Calls 155, 163, 168
 - Open Mailbox 27
 - programming memory buttons 26
 - Forced Play greetings 123, 172
 - Formula for waiting calls 173
 - Forwarding a message 74
- G**
 - General Call Center parameters 157
 - Greeting
 - exporting 108
 - importing 107
 - recording 108
 - Greetings, call center
 - examples 103
 - Forced Play 123
 - Greeting parameters in Routing Table 123
 - Greeting step in Routing Table 122
 - recording 105
 - Routing Table parameters 172
 - tips 171
 - types 103
 - Greetings, skillset mailbox, example 64, 68
- H**
 - Highest priority call 172
 - Hours
 - operation for a skillset 131
 - Routing Tables 109
 - Hunt groups 178

I

Indicators

- Message Waiting 27, 40, 42, 58, 158
- Primary 182
- Primary alert time 155
- Secondary 182
- Secondary alert time 155

Initializing a skillset mailbox 59

Intelligent Caller Input Routing

- Advanced 10, 109
- Basic 10, 109

Intelligent CLID/DNIS Routing 10, 109

Intelligent Overflow 14, 110

Intelligent Routing 10

- using with CCR 10, 109

Internal messages, replying to 75

L

Language preference 40

Language, changing availability 153

Least Busy method of call distribution 197

Lines

- assigned to be answered by skillset 37
- configuring 149

Logging off

- agent 35
- supervisor 170

M

Mailbox

- opening skillset mailbox 60
- outdial route 80
- skillset mailbox 57

Mailbox interface

- CallPilot 24
- Norstar Voice Mail 24

Manual call presentation 10, 29

Master Client Address 156

Memory button

- indicator 26, 27, 155, 163
- programming 26, 27

Message Waiting Indication

- determining extension 58
- extension 197

Message Waiting Indication extension 40

Messages

- copying 71
- deleted, retrieving 72
- deleting 71, 74

erasing 71, 74

external 75, 77

forwarding 74

internal 75

minimum recording length 75

Off-premise Message Notification 79

playing

envelope, CallPilot interface 74

envelope, Norstar Voice Mail 71

next, CallPilot 73

next, Norstar Voice Mail 72

pausing 72

previous, CallPilot 73

previous, Norstar Voice Mail 72

rewinding 71, 73

skipping forward 72, 73

skipping to end 71

quitting 72

replaying 72

replying, CallPilot 74, 75

replying, Norstar Voice Mail 72, 75

saving 72

silence timeout 75

skillset mailbox 57

Method of Call Distribution 40, 197

Monitoring

agent calls 163

call activity, about 163

example of monitoring 168

logging on to monitor agents 164

Primary alert time 155

Secondary alert 155

Silent Monitor 163

skillsets 168

tips 164

using a headset 164

Monitoring agents 53, 163

Multimedia Call Center 11, 30

CLID/DNIS Routing 44

MWI extension 197

N

Name

skillset 198

skillset mailbox 59

Night mode, skillset 110

Night Routing Table, example 137

Norstar Voice Mail mailbox interface 24

Notification, Off-premise Message Notification 79

Number

Control DN 27

- skillset mailbox 27
- O**
- Off-premise Message Notification 172
 - about 79
 - changing parameters 92
 - destination number
 - character limit 88, 90, 99
 - destination pager number and message
 - character limit 87
 - feature restrictions 81
 - setting up
 - to a pager number 87
 - to a telephone number 82
 - to an extension number 85
 - to wrong destination 79
 - Off-premise Message Notification parameters
 - destination telephone number 81
 - destination type 81
 - time range 81
 - types of message 81
 - Open Mailbox Feature Code 27
 - Opening a skillset mailbox 60
 - Opening your mailbox
 - CallPilot 60
 - Norstar Voice Mail 60
 - Operator
 - resetting password 175
 - Operator, resetting password 175
 - Outdial route, mailbox 80
 - Overflow, Intelligent 14
- P**
- Parameters
 - general Call Center 157, 172
 - Routing Table Greetings 123
 - Password
 - changing skillset mailbox 62
 - resetting agent password 33
 - resetting Call Center Administrator 176
 - resetting Operator 175
 - resetting skillset mailbox 63
 - skillset mailbox 59, 62
 - Pausing a message 72
 - Playing message envelope
 - CallPilot interface 74
 - Norstar Voice Mail 71
 - Post call Break Time, automatic timeout 28
 - Preferred method of call distribution 197
 - Preventing calls from ringing at an agent's telephone 178
 - Professional Call Center 9, 13
 - Programming a memory button 26
- R**
- Real time status of call activity 163
 - Recording, greeting 108
 - Remotely opening a skillset mailbox 61
 - Replaying messages 72
 - Reply feature 73
 - Replying
 - to an external message sender 77
 - using the DIAL option 77
 - to an internal message sender 75
 - to messages, CallPilot 74
 - to messages, Norstar Voice Mail 72
 - Reserved channels 156, 173
 - Resetting
 - agent password 33
 - Call Center Administrator password 176
 - Operator password 175
 - skillset mailbox password 63
 - Restrictions for using Call Forward No Answer 178
 - Restrictions for using Call Forward on Busy 178
 - Retrieving deleted messages 72
 - Retrieving messages from skillset mailbox 70
 - Reviewing
 - agents 53
 - Routing Table steps 138
 - Rewinding messages 71, 73
 - Rings assigning 151
 - Rings, assigning number 150
 - Routing Table
 - assigning skillset hours 131
 - examples of 135
 - Greeting parameters 123
 - Greeting step 122
 - hours 109
 - maximum number of steps 13, 109
 - parameters of Greeting step 123
 - reviewing the steps 138
 - setting up 135
 - tips 172
 - Routing Table steps
 - Disconnect 122
 - Distribute for 122
 - Greeting 122
 - Transfer 122
-

-
- Routing Table, about 109
 - Routing, DID 43
 - S**
 - Saving messages 72
 - Secondary alert 155
 - Service Mode, skillset 110
 - Setting up
 - general Call Center parameters 157
 - general parameters 153
 - Off-premise Message Notification
 - to a pager number 87
 - to a telephone number 82
 - to an extension number 85
 - skillset parameters 41
 - Silent Monitor 53, 163
 - Skillset
 - 24 Hour Service mode 110
 - about 37
 - assigning agents 49
 - assigning hours of operation 131
 - Break Time 40
 - Control DNs 38
 - Day mode 110
 - default mode 110
 - Delay Answer 40
 - disabling 55
 - DNs 38
 - enabling 54, 179
 - how calls are received 37
 - how lines are answered 37
 - language preference 40
 - maximum greeting length 173
 - Message Waiting Indication extension 40
 - Method of Call Distribution 40
 - MWI DN 40
 - name 39, 198
 - night mode 110
 - problems changing general parameters 179
 - problems enabling 179
 - properties 38
 - Service Mode 110
 - setting up 37
 - start and end times 14
 - unconfiguring 56
 - viewing agents in 53
 - Skillset mailbox
 - about 57
 - changing password 62
 - checking for messages. 70
 - Class of Service 57
 - determining MWI extension 27
 - determining number 27
 - greeting example 64, 68
 - initializing 59
 - leaving a message in 172, 174
 - listening to messages 70
 - Message Waiting Indication extension 58
 - messages 70
 - messages waiting 197
 - number 38, 57, 58
 - opening 60
 - opening remotely 61
 - password 59, 62
 - password, changing 62
 - resetting password 63
 - retrieving messages 70
 - setting up 57
 - tips 172, 174
 - Skillset parameters
 - Control Directory Number (CDN) 38
 - Delay answer 195
 - Message Waiting Indication extension 197
 - Method of Call Distribution 197
 - setting up 41
 - Skillset name 198
 - Skillset, attendant extension 40
 - Skipping forward in messages 72, 73
 - Skipping forward to end of messages 71
 - Software Authorization Codes 160
 - Steps, Routing Table 122
 - Supervisor, functionality 13
 - System Administrator, Feature Codes 27
 - T**
 - Table, Routing Table 109
 - Telephone
 - line display 21
 - system timeout 21
 - Time
 - Primary alert time-limit 155
 - Secondary alert 155
 - Timeout
 - CallPilot Manager 19
 - telephone 21
 - Tips
 - agent administration 171
 - Call Center general parameters 172
 - configuration limits 15, 180
 - recording call center greetings 171
 - Routing Table administration 172
 - skillset administration 171
 - skillset mailbox 172, 174
-

Transfer 177

- to Auto Attendant 10
- to CCR 10
- to Operator 10
- to skillset mailbox 10

Transfer Allowed

- enabled 123

Troubleshooting

- agent log on problems 177
- call processing problems 15, 180
- cannot change the Call Center Skillset Parameters 179
- enabling a skillset 179
- skillset settings 17, 179
- slow call processing 15, 180
- unpredictable call processing 15, 180

Two line display telephone, using 21

U

Unassigning agents 52

Unconfiguring a skillset 56

Using Intelligent Overflow 110

V

Viewing agents in a skillset 53

Voice Button calls 30

- CLID/DNIS Routing 45

Voice channels 156, 172