User Manual in English

Call Center 1.0 - 1.0 RC Elastix

For more information visit www.elastix.org

1. Call Center

This modules objective is to generate calls automatically to numbers that have been previously uploaded in a CSV file format. It also monitors calls received through a queue.

1.1. Using Call Center

To use the Call Center Module, you must first select a few options and provide some necessary data. Here's the order in which it is recommend to enter this data.

1. Enter information for the agents.
2. Enter types of breaks (if necessary).

For incoming calls:

2.1. You can upload a CSV file with customer information so this information can be displayed on your screen when a call is being received

2.2. Select the queue to be used for incoming calls

For outgoing calls:

2.1. Create forms to collect information from customers that agents are calling.

2.2. Create outgoing campaigns that indicate telephone numbers to call, hours of calls, etc.

If all of the above items are ready, you can then enter the agent console where calls are conducted and received.

1.2. Services

It is important to know that for the module to function properly Call Center must have the Elastixdialer service initiated. This service by default is stopped, but can be start with the command:

Service elastixdialer Start

1.3. Agents

This allows us to enter the data of the people going to operate the system and have been named agents. Each agent must have a number and password assigned in order to make or receive calls.

A) Agent List

Displays list of agents, with the following data (**See Table: 1** for a description of options):

Table: 1

Disconnect	Disconnect an agent, which has an active session in the agent console.
Configuration	✔ The agent is recorded in the database and the configuration file asterisk Indicates that there is a mistake with this agent, possible cause: 1. Not registered in the configuration file asterisk 2. No record in the database
Number	Number assigned to the agent. This number identifies the agent to the system.
Name	Name of Agent
State	Connected / Disconnected
Options	<u>View</u>: Displays agent information, the agent may be Modified or Deleted. <u>Repair</u>: An agent will be repaired if the following situations exist: 1. Not registered in the configuration file asterisk, data will be gathered from the database. 2. No record in the database, data will be gathered from the configuration file asterisk

B) New Agent
To add a new agent, click the new agent button. This displays a form with the following fields (**See Table: 2** for a description of options):

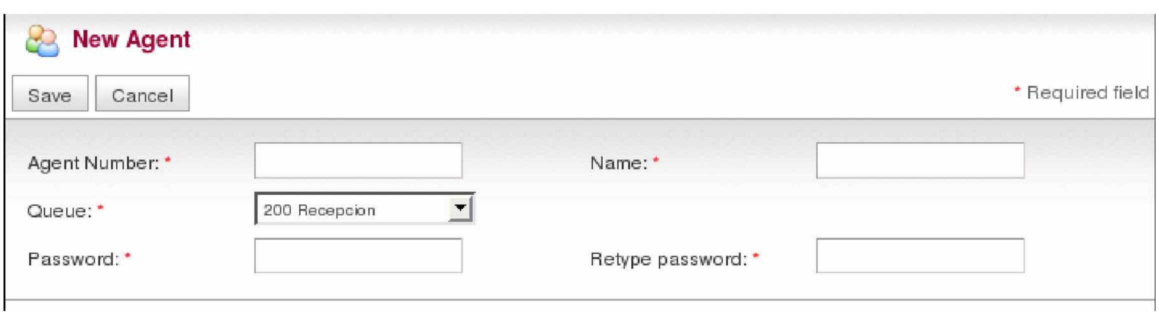
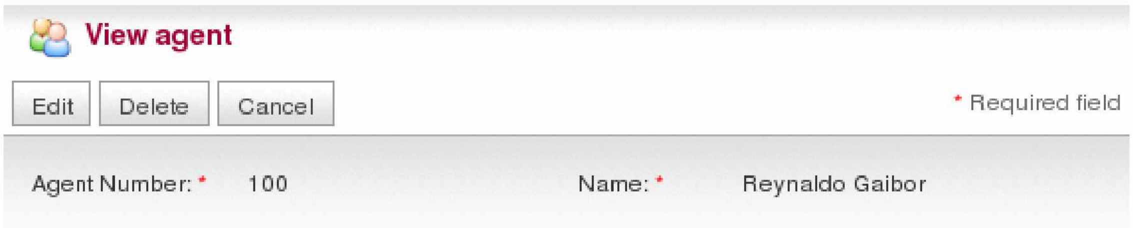


Table: 2

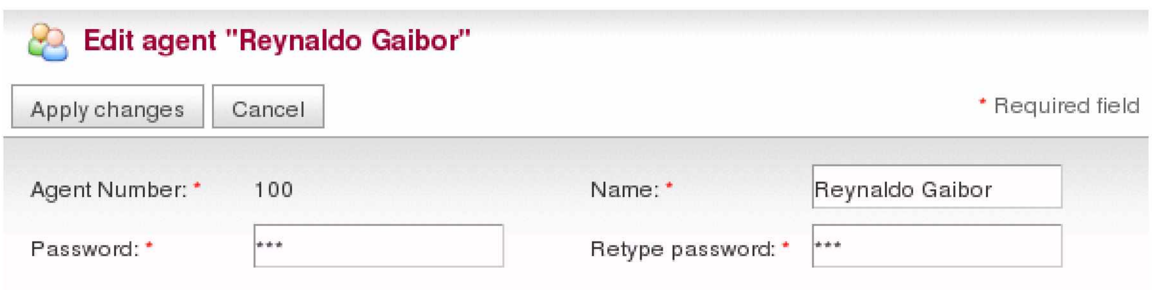
Agent Number	Number assigned to an agent. Take into account this number is for identification and sign in.

Name	Name of Agent
Queue	
Password Confirm Password	Password of Agent

<u>View, Edit and Delete</u>:
When clicking on the view button, this will lead you to a screen where agent data is displayed including: Agent Number and Agent Name.



To delete an agent, click on the remove button. You can also modify the data of the agent with the edit button. Data able to be changed include: Name and Password.



1.4. Forms

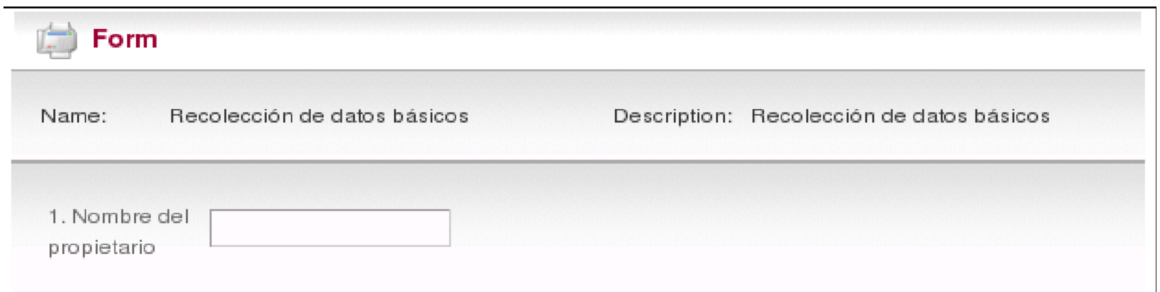
This window allows the creation of forms, which are created with the objective of collecting data to run a campaign and make calls from the agent console. In this menu, there are two options Form List and Form Designer.

A) Form List
Displays list of existing forms, with an option to preview them before they are used in a live campaign. (**See Table: 3** for a description of options):

Table: 3

Name	Name of Form
Description	Description of Form
State	State of Form: Active / Inactive
Options	Preview: Graphical display of the form

<u>For preview of forms</u>:
Clicking on preview will provide a graphical layout which displays the name, description, and fields in a form. It is important to note that this option does not allow you to enter any data.



B) Form Designer
Like previous options (**See Table: 4** for a description of options):

Table: 4

Name	Name of Form
Description	Description of Form
State	State of Form: Active / Inactive
Options	<u>View</u>: Text display of the fields which hold the form data. The form can be: Edited, De-activated, Deleted. <u>Activate</u>: Activates forms whose status is inactive.

***To add a new Form*:**
You must begin by clicking on Create New Form. It will show a screen that should look similar to the one displayed below. (**See Table: 5** for a description of options):

Fields are added with the section titled New Field. You must complete the field options and then click on Add Field. (**See Table: 5** for a description of options):

Note: The form will only contain fields that have been specified.

Note: If you select Type List, the possible options are indicated by separating options with a comma.

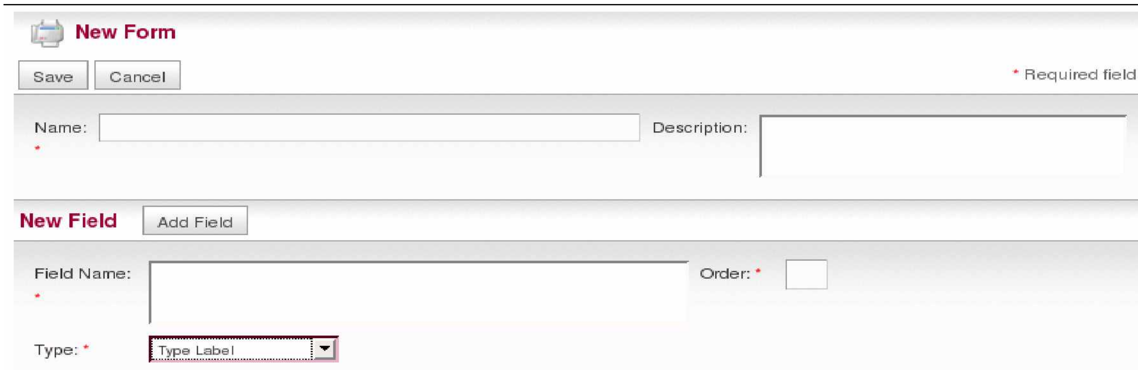
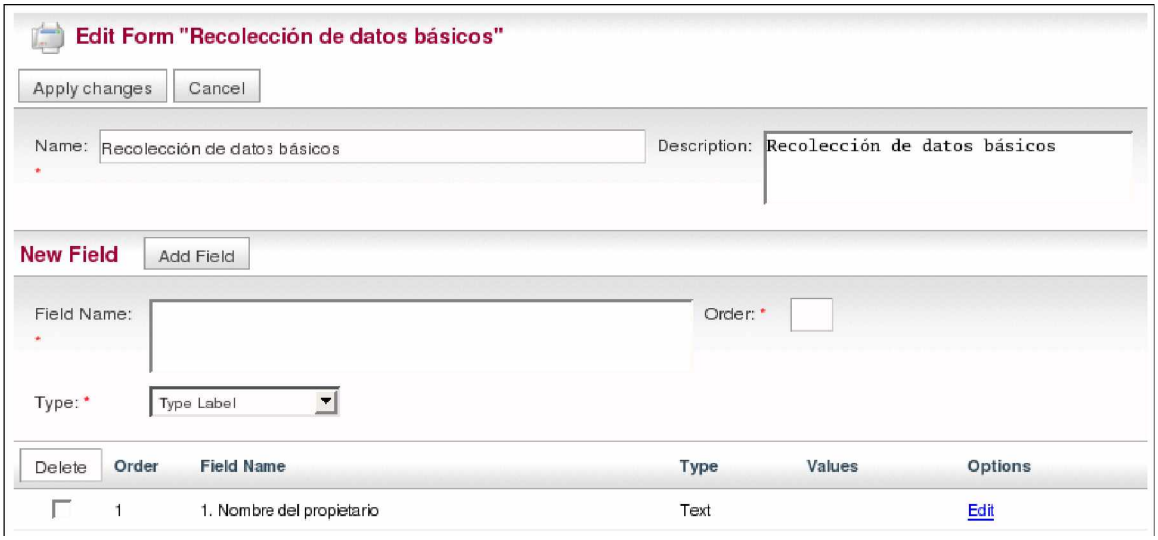


Table: 5

Name	Name that identifies form
Description	A short description to indicate why the form was created
Name of field	Name of field
Order	Order of fields
Type	Type Label - Label Type Text - Text Box Type List - Combo Box Type Date - Field type date Type Text Area - Entering of text

***View, Edit and Delete*:**
When clicking on the view button, this will lead you to a screen where form data is displayed including: Field Order, Field Name, Field Type and Field Values.

Using the buttons at the top of the view form section you're able to: Edit, Deactivate, and Delete the form currently being viewed. Clicking the edit button allows changing the form name and description, as well as adding, editing and deleting previously defined fields.



1.5. Campaigns

This section is used to create what is known as outbound campaigns, which is information that generates a series of calls automatically to telephone numbers that are uploaded in a CSV file.

A) Campaigns List
This area shows all outbound campaigns that have been created in the system. The data is displayed in the form of columns (**See Table: 6** for a description of options):

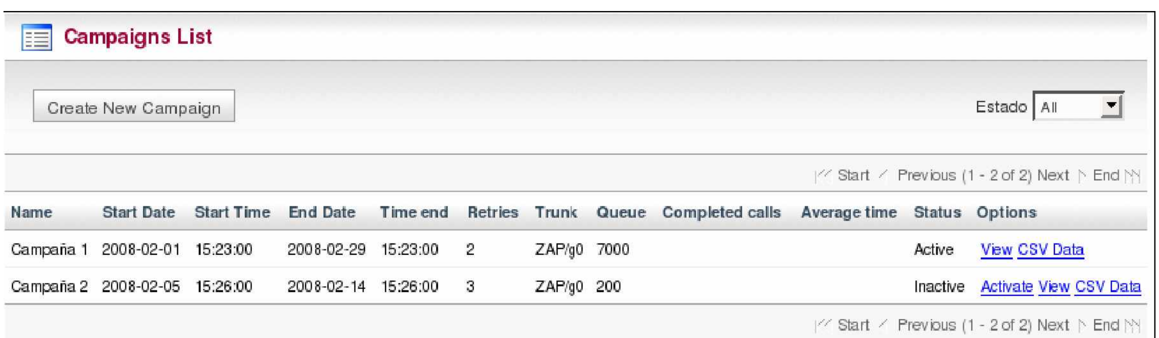


Table: 6

Name	Name of Campaign
Start Date	Date of Campaign Initiation
Start Time	Campaign Start Time
End Date	Date of Campaign Completion
Time End	Campaign End Time

Retries	Number of Attempts to Made to Each Number
Trunk	Outgoing Call Path Used During Campaign
Queue	Queue Used During Campaign
Completed Calls	Number of Calls Completed
Average Time	Average Duration of Calls
State	State of Campaign: Active / Inactive
Options	<u>View</u>: Details of the campaign. In addition, the outgoing campaign can be Edited, Disabled, or Removed. <u>Activate</u>: Activate campaign whose status is inactive. <u>CSV Data</u>: Data in CSV format of the form collected in the respective campaign.

B) New Campaign
From this screen we are going to specify all the necessary data for the creation of a campaign. Take into account that this data is important to the generation of outbound calls. (**See Table: 7** for a description of options):

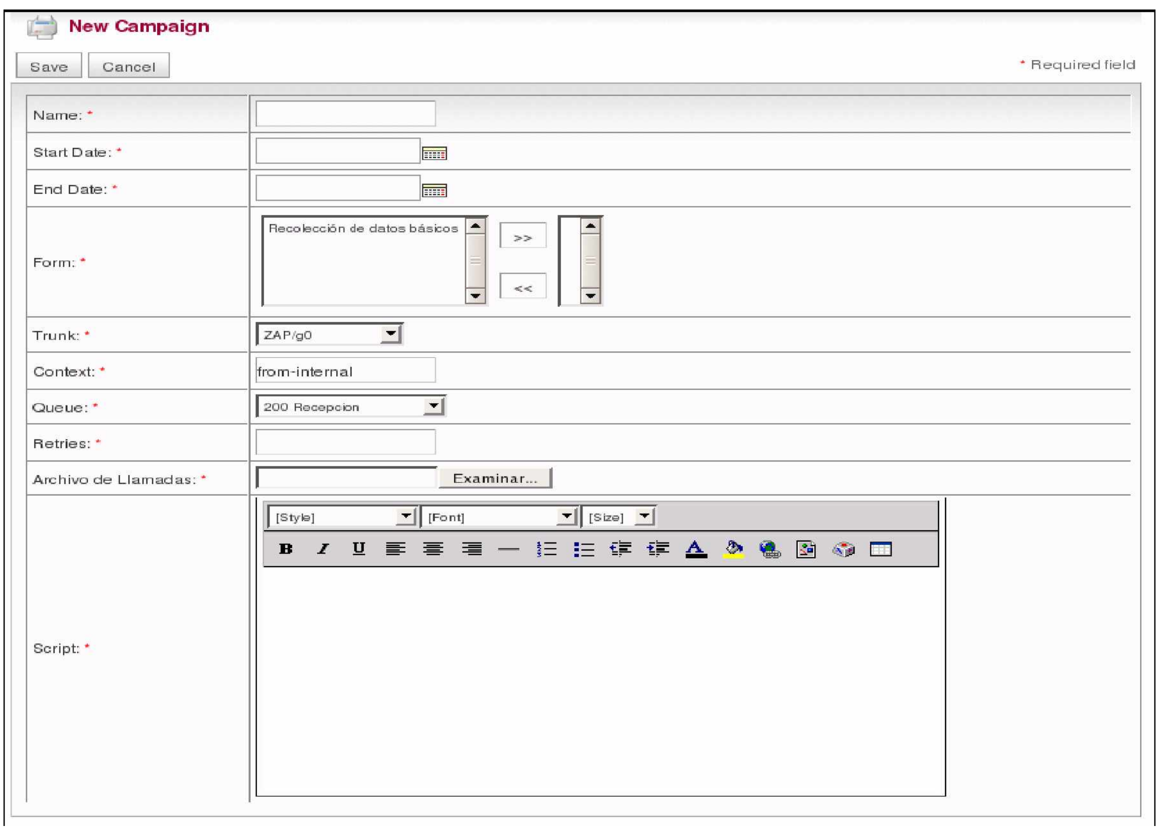


Table: 7

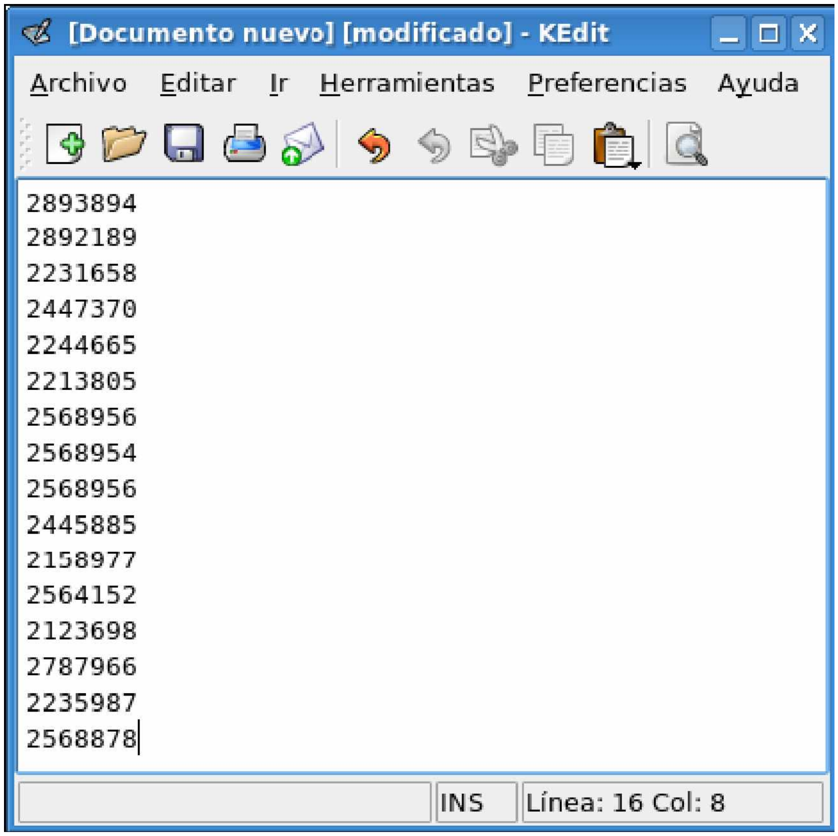
Name	Name of Campaign
Start Date	Date of Campaign Initiation
End Date	Date of Campaign Completion
Form	Forms used to collect data through Campaign
Trunk	Outgoing Call Path Used During Campaign
Context	Context Used Campaign, Default: **frominternal**
Queue	Queue created in IVR of the agents that make calls and are assigned to carry out campaign
Retries	Number of Attempts Made to Each Number
Archive of Calls	CSV File that contains phone numbers and data used during campaign. **See Examples**
Script	A message or script used by agents during the course of a call that servers as a guide, such as a greeting or other information that is needed on a repetitive basis during the campaign

Archive of Calls:
This file will be used to place calls; marked by the call center module to conduct a campaign. It is also possible to specify additional data such as name, address, region, industry, etc..., using additional columns.

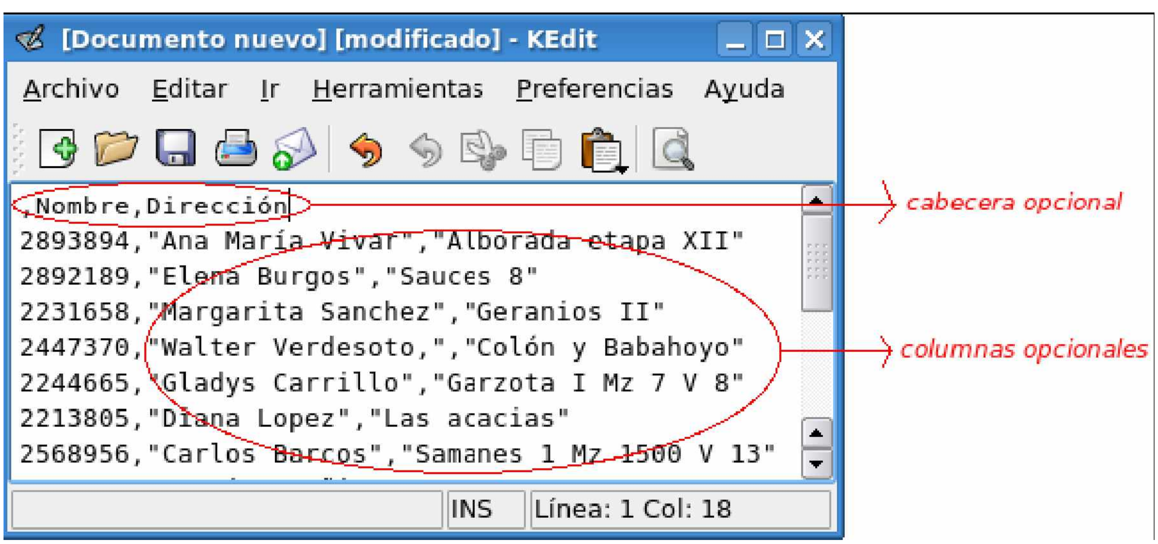
***Restrictions on the file*:**
-- Must be in CSV format.
-- The first column must be the phone number.
-- If using column headers they must be in the first row and start with a comma (,).

Note: The telephone number, will not have any starting (,) commas, the other fields will be separated (,) by commas. **(See Examples below**)

Basic File Format
Example

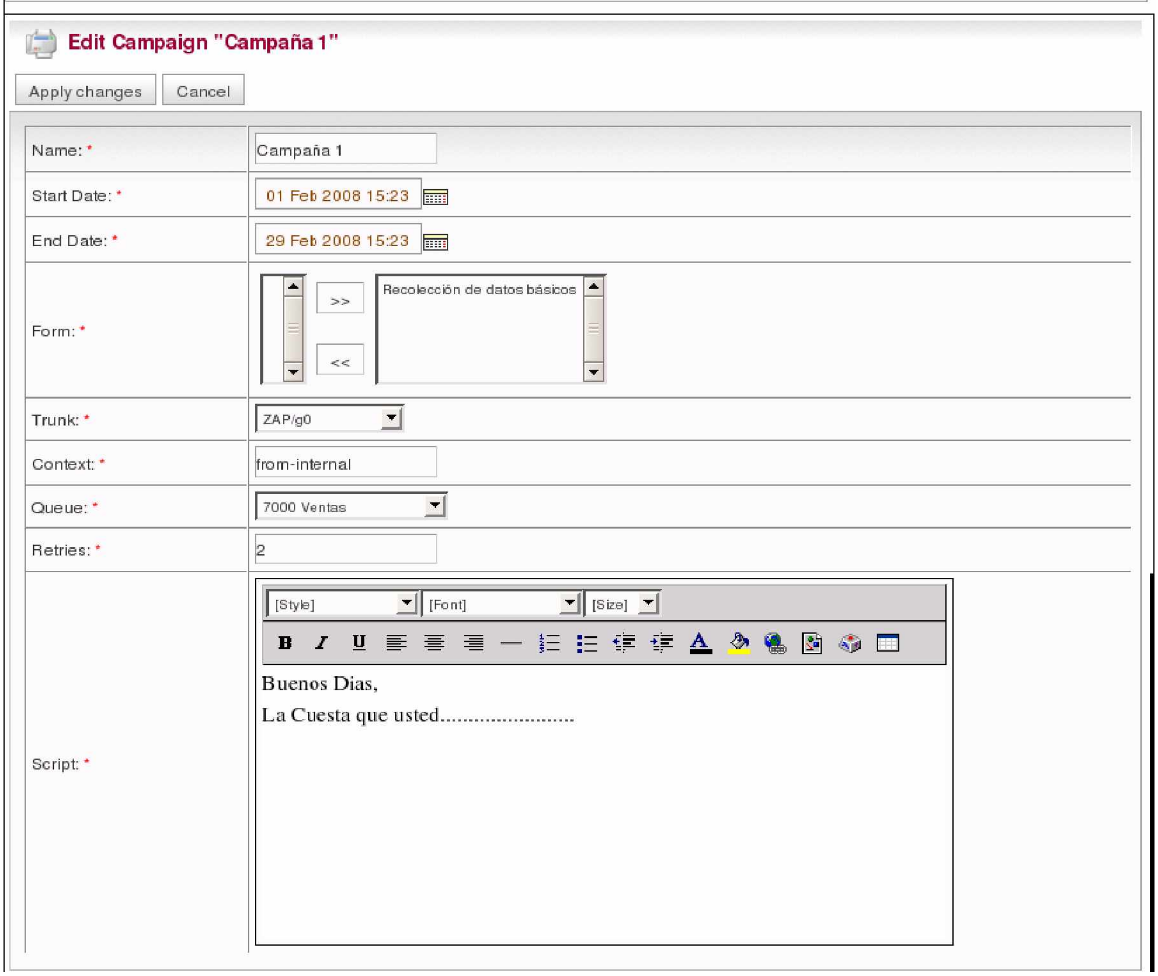


Advanced File Format
Example



View, Edit and Delete

When clicking on the view button, this will lead you to a screen where Campaign data is displayed. To edit, remove or disable a campaign use the buttons at the top of view campaign. The data that can be changed are: Name, Start Date, End Date, Form, Trunk, Context, Queue, Retries, and Script.



1.6. Queue

Queues are designed for receiving calls in a call center. They allow monitoring of calls received by an agent and help to determine if a call was connected successfully or failed to be received.

A) Queue List
Displays list of the Incoming Calls, (**See Table: 8** for a description of options):

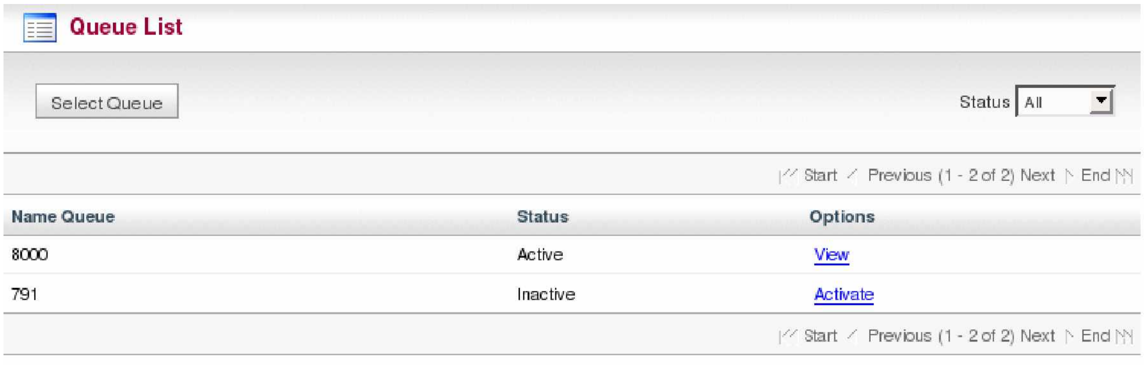


Table: 8

Queue	Number of the Queue
Status	Status of Queue: Active / Inactive
Options	<u>View</u>: Displays information of the queue, such as: Script; detailing what message is being used by the agents. The selected queue may be; Edited or De-Activated <u>Activate</u>: Activate queue whose status is inactive.

B) Select Queue
To select a queue, click the Select Queue button. This displays a form which will have the following fields, (**See Table: 9** for a description of options):

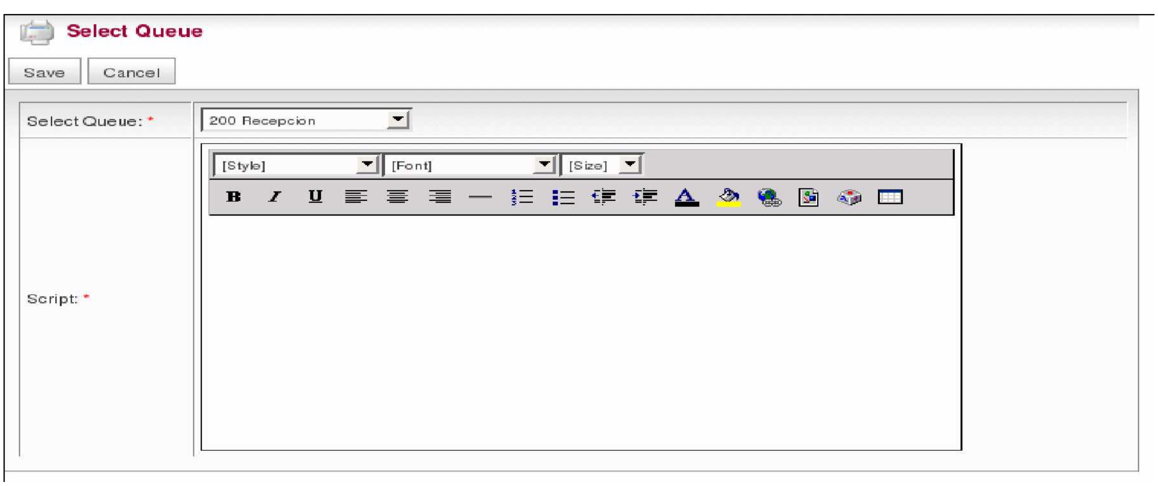


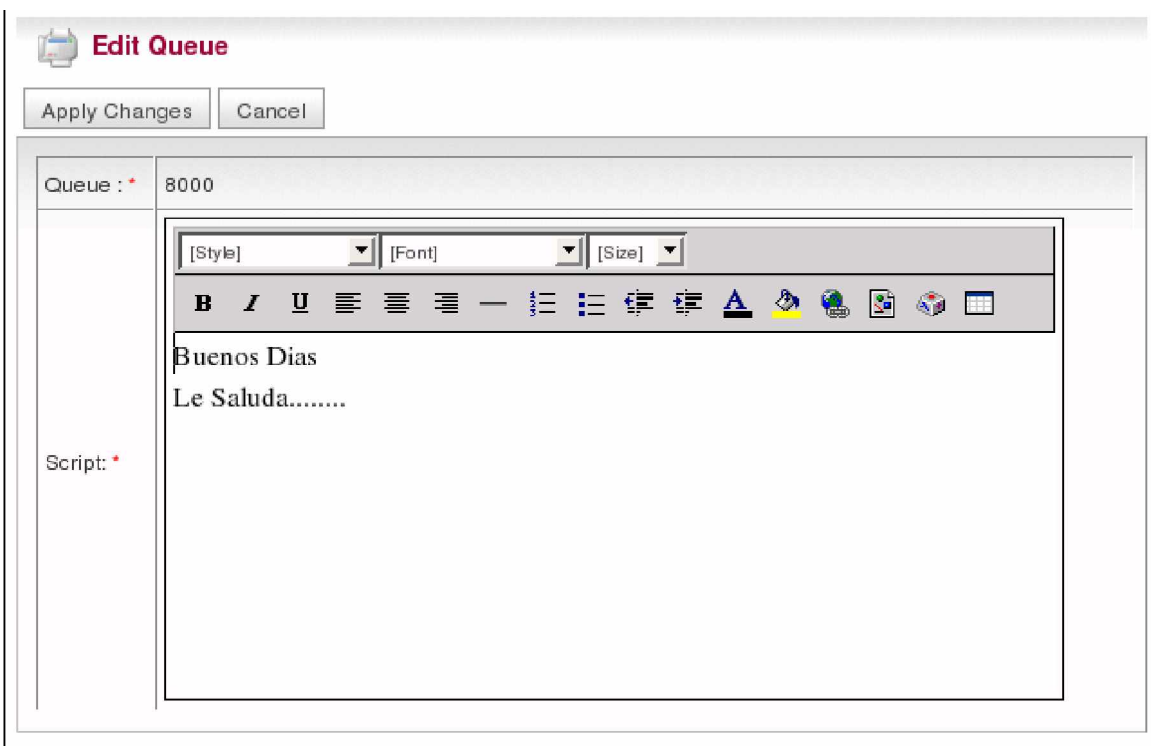
Table: 9

Select a Queue	Select a Queue
Script	Message displayed to Agent

View, Edit and Delete

Selecting view, will lead to a screen displaying data from the queue.

To remove a queue, select the delete button. You can also modify the data for the queue by clicking the edit button, which allows modification of the agent script.



1.7. Break Administration

The option “Break Administration”, allows us to create moments of predefined times in which the agents or receptionist will not receive calls; Example: An agent lunch break, by identifying a standard time for this break, it will help determine the productivity of agents and recognize what times the agent was absent from the call center.

A) List Breaks

Break lists will be displayed, with the following data (**See Table: 10** for a description of options):

Table: 10

Name	Break Name
Description	Brief Description of the Break
Status	Status of Break: Active / Inactive
Options	View: Displays information of the break. The break may be: Edited or De-Activated Activate: Activate break whose status is inactive.

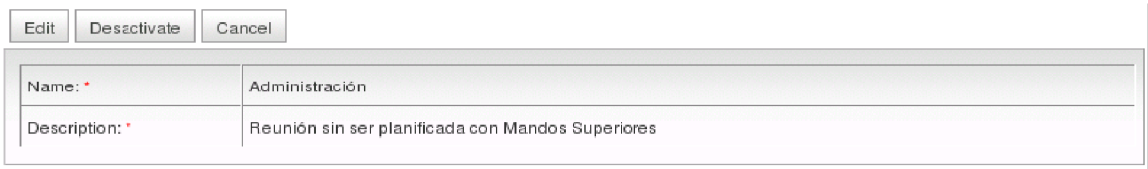
B) Insert new Break

To create a break, click on "Create New Break”. This displays a form which includes the following fields (**See Table: 11** for a description of options):

Table: 11

Name	Break Name
Description	Brief Description of the Break

View, Edit and Delete
When selecting “view”, this displays the break information.



To disable a break, click “Disable”. You can also modify the data by clicking on the break “Edit” button. Data able to be changed is: Name and Description.

1.8. Agent Console

The “Agent Console” provides agents the ability to conduct a Telephone Campaign (Default is surveys to telephone numbers), by an agent of the call center. Agents will receive calls from telephone numbers by entering the queue specified in the option “incoming calls”. To enter “Agent Console”, you must enter the “Agents Numbers” who have been allocated, as well as, the extensions to be used for conducting the campaign. Data may be collected utilizing pre-designed forms. It is extremely important to remember that an agent must “Close Meeting” at the end of their time in call center; due to recording; the duration of agent activity while conducting a campaign could allow errors in the reports.

A) Income Agent Console.
You will see the following Interface (**See Table: 12** for a description of options):

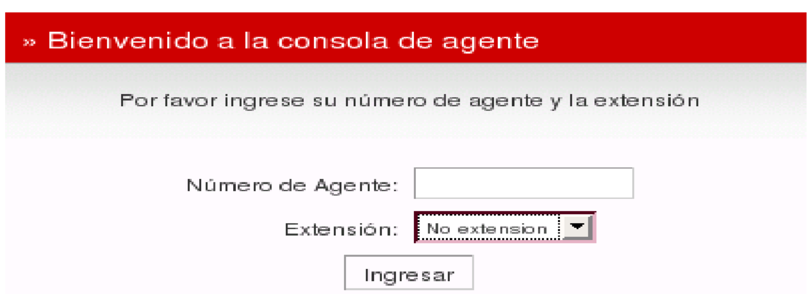


Table: 12

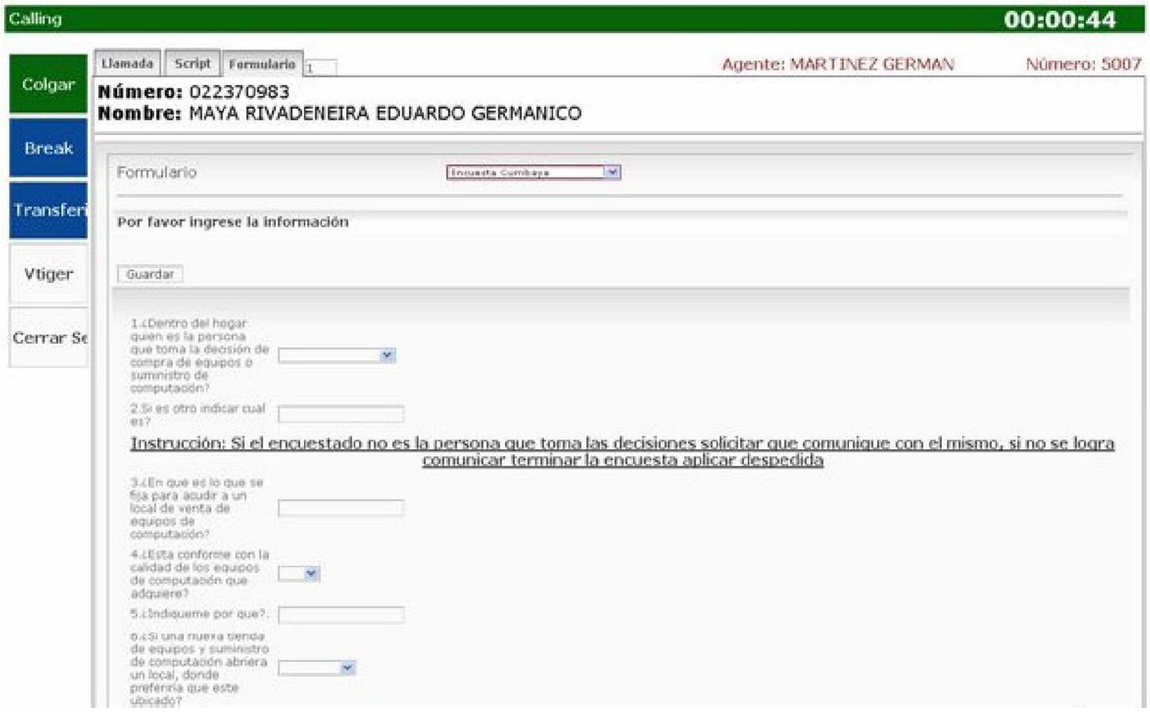
Agent Number	Agent Number
Extension	Select the extension to receive or conduct calls with

B) Agent Console
After entering the agent console, wait a few seconds while active campaigns are determined, if any campaigns are active, an agent will begin conducting calls to the numbers provided earlier in the creation of the campaign.

C) Calls
Calls are made to numbers that were submitted in section “1.5. Campaigns”. The information displayed will vary based on the data provided: if using the basic file format of calls, only the number being dialed is shown; if using an advanced file format the number, name, address, etc. will be shown, see end of section “1.5. Campaigns” for details.

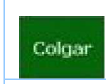
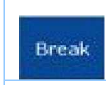
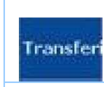
As you can see call center is making a call to the number shown in the screen above, also notice the additional information that was entered into the call file is displayed.

D) Script
Provides steps or information for the agent to follow during the campaign; example: Hi, my name is (agent name) thank you for taking the time…….. Etc. The script will depend on the type of campaign being conducted.



E) Form
Choose a form from the drop down list when the call has successfully connected, which allows collecting information from the contact you're attempting to reach.

F) Agent Console Buttons

	Hang-Up: To cancel a call that has been completed.
	Break: To take a break from calls that are being made in a campaign.
	Transfer: To transfer the call to an extension.
	Vtiger: It shows the link Vtiger CRM integrated ELASTIX
	Logout: It is very important to logout, at the end of the campaign, or leaving agent console for any reason. If the agent forgets to logout the administrator of the agents will need to disconnect them.

1.9. Reports

A) Break Report

Displays information relating to the time in which an agent or receptionist has not been, making or receiving calls due to a break. This Information is organized by agent number.

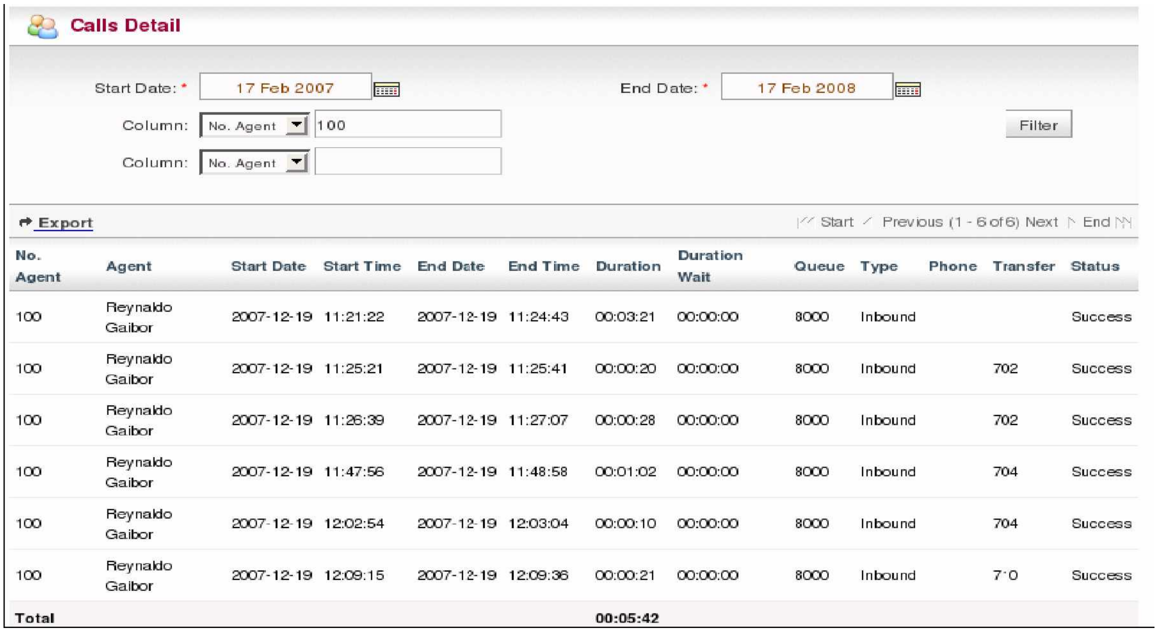
The report can change depending on the filtered values. Start by selecting a start date or end date. A report will be generated with the following fields (Export file in CSV, fields are separated by commas **See Table: 13** for a description of options):

Table: 13

Start Date	Filter Break Start Dates
End Date	Filter Break End Dates
Export	Export CSV List of Filtered Breaks
Agent Number	Number of the Agent
Agent Name	Name of the Agent
Hold	Default Break Time
Administration, Lunch, Meeting	Samples of Break Times (See Break Administration)
Total	Total break time taken by agent

B) Call Details

Display information in detail of the calls received (Inbound) and made (Outbound) through Call center. Entering the range of dates which you want to see the details of, allows you to identifying the status of a call received or completed, the duration of a call, and etc, **(See Table: 14** for a description of options):



Calls Detail

Start Date: * 17 Feb 2007 End Date: * 17 Feb 2008

Column: No. Agent 100

Column: No. Agent

Filter

Export

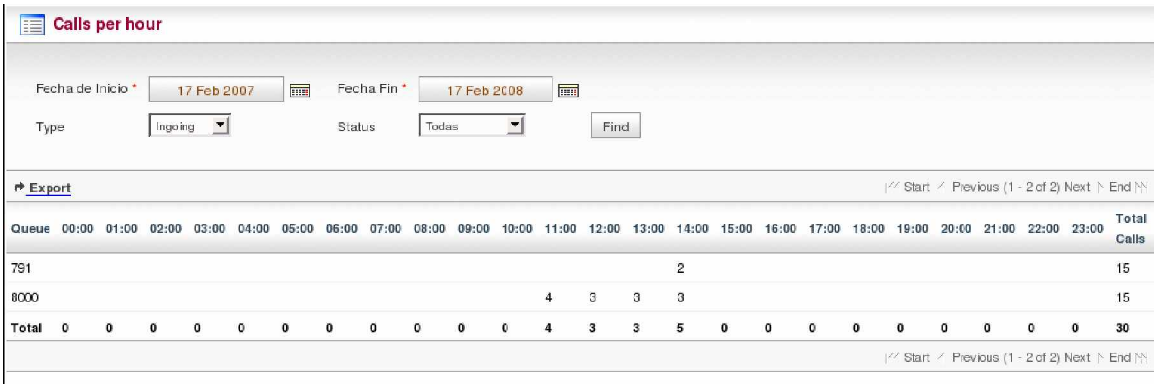
Start Previous (1 - 6 of 6) Next End

No. Agent	Agent	Start Date	Start Time	End Date	End Time	Duration	Duration Wait	Queue	Type	Phone	Transfer	Status
100	Reynaldo Gaibor	2007-12-19	11:21:22	2007-12-19	11:24:43	00:03:21	00:00:00	8000	Inbound			Success
100	Reynaldo Gaibor	2007-12-19	11:25:21	2007-12-19	11:25:41	00:00:20	00:00:00	8000	Inbound		702	Success
100	Reynaldo Gaibor	2007-12-19	11:26:39	2007-12-19	11:27:07	00:00:28	00:00:00	8000	Inbound		702	Success
100	Reynaldo Gaibor	2007-12-19	11:47:56	2007-12-19	11:48:58	00:01:02	00:00:00	8000	Inbound		704	Success
100	Reynaldo Gaibor	2007-12-19	12:02:54	2007-12-19	12:03:04	00:00:10	00:00:00	8000	Inbound		704	Success
100	Reynaldo Gaibor	2007-12-19	12:09:15	2007-12-19	12:09:36	00:00:21	00:00:00	8000	Inbound		710	Success
Total						00:05:42						

Table: 14

Start Date	Filter Call Start Dates
End Date	Filter Call End Dates
Column	Enter Column: Agent No. Queue Type (Inbound – Outbound) Number
Column	Enter Column: Agent No. Queue Type (Inbound – Outbound) Number
Export	Export CSV List of Filtered Calls
Agent Number	Number of the Agent
Agent Name	Name of the Agent
Duration	Total Time of call
Wait	Duration Before Connection
Type	Inbound - Outbound
Phone	Telephone Number
Transfer	Extension call was transferred to
Status	Call was completed Successfully

C) Calls by Time
This displays information on calls received or called hourly identified by queue. It details the number of calls made in each hour (24 hours) displayed by each queue. The total number of calls are filtered by the dates selected **(See Table: 15** for a description of options):



Queue	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00	Total Calls
791															2										15
8000												4	3	3	3										15
Total	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**4**	**3**	**3**	**5**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**30**

Table: 15

Start Date	Filter Call Start Dates
End Date	Filter Call End Dates
Type	Incoming / Outgoing
Status	All / Successful / Abandoned
Export	Export CSV List of Filtered Calls
Queue	Number of the Queue
1:00 / 2:00/ etc…	Total Calls Per Hour
Total	Total Calls Per 24 Hours

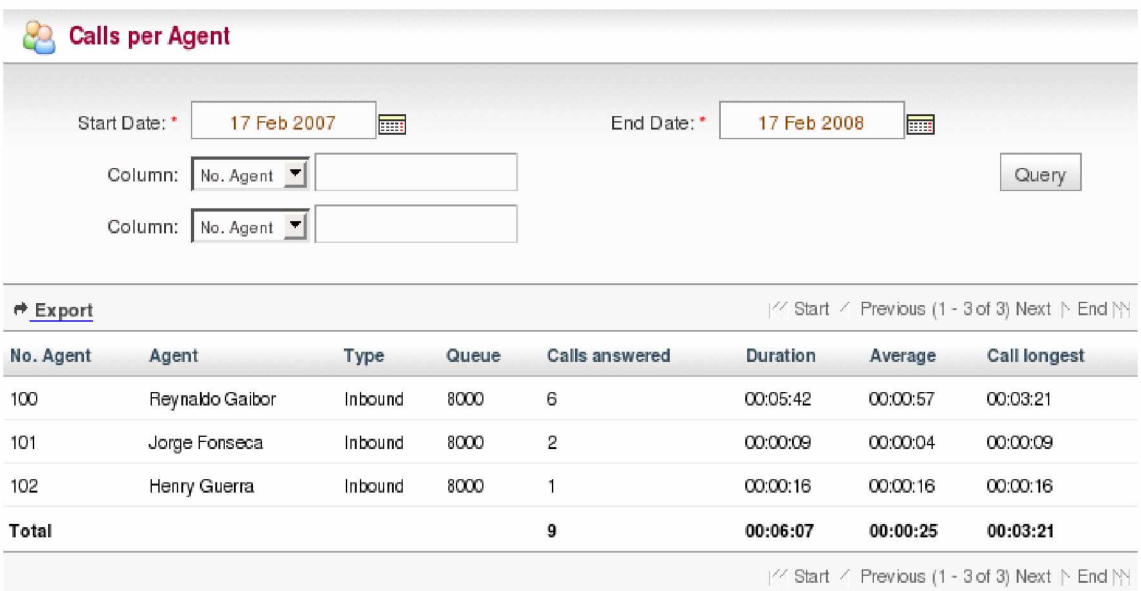
D) Incoming Calls
Display information on the number of calls received, organized by queue showing the total number of calls Successful, Abandoned, Monitoring, Active, and Hold Time **(See Table: 16** for a description of options):

Queue	Successful	Abandonated	Order Monitoring	Active	Hold Time	
8000	9	4	0	0	00:00:50	13
Total	**9**	**4**	**0**	**0**	**00:00:50**	**13**

Table: 16

Start Date	Filter Call Start Dates
End Date	Filter Call End Dates
Export	Export CSV List of Filtered Calls
Queue	Number of the Queue
Successful	Number of Successful Calls
Abandoned	Number of Abandoned Calls
Monitoring	Number of Monitored Calls
Active	Number of Active Calls
Hold Time	Number of Calls on Hold

E) Calls per Agent
This screen displays information on the number of calls received (Inbound) or made (Outbound) by an agent. This help to generate an agents calling activities with respect to duration, average call, and longest call **(See Table: 17** for a description of options):



No. Agent	Agent	Type	Queue	Calls answered	Duration	Average	Call longest
100	Reynaldo Gaibor	Inbound	8000	6	00:05:42	00:00:57	00:03:21
101	Jorge Fonseca	Inbound	8000	2	00:00:09	00:00:04	00:00:09
102	Henry Guerra	Inbound	8000	1	00:00:16	00:00:16	00:00:16
Total				**9**	**00:06:07**	**00:00:25**	**00:03:21**

Table: 17

Start Date	Filter Call Start Dates
End Date	Filter Call End Dates
Column	Enter Column: Agent No. Queue Type (Inbound – Outbound)

Column	Enter Column: Agent No. Queue Type (Inbound – Outbound)
Export	Export CSV List of Filtered Calls
Agent Number	Number of the Agent
Agent Name	Name of the Agent
Type	Inbound - Outbound
Queue	Number of the Queue
Calls Answered	Total Calls Answered by agent
Duration	Total duration of calls
Average	Average duration of calls
Longest Call	Longest Call Made

E) Hold Time

Display information of calls in a range including both, called and received, in addition to the total waiting time, average wait time, longest wait time, as well as the total number of calls for that queue. The time ranges are shown in Seconds **(See Table: 18** for a description of options):

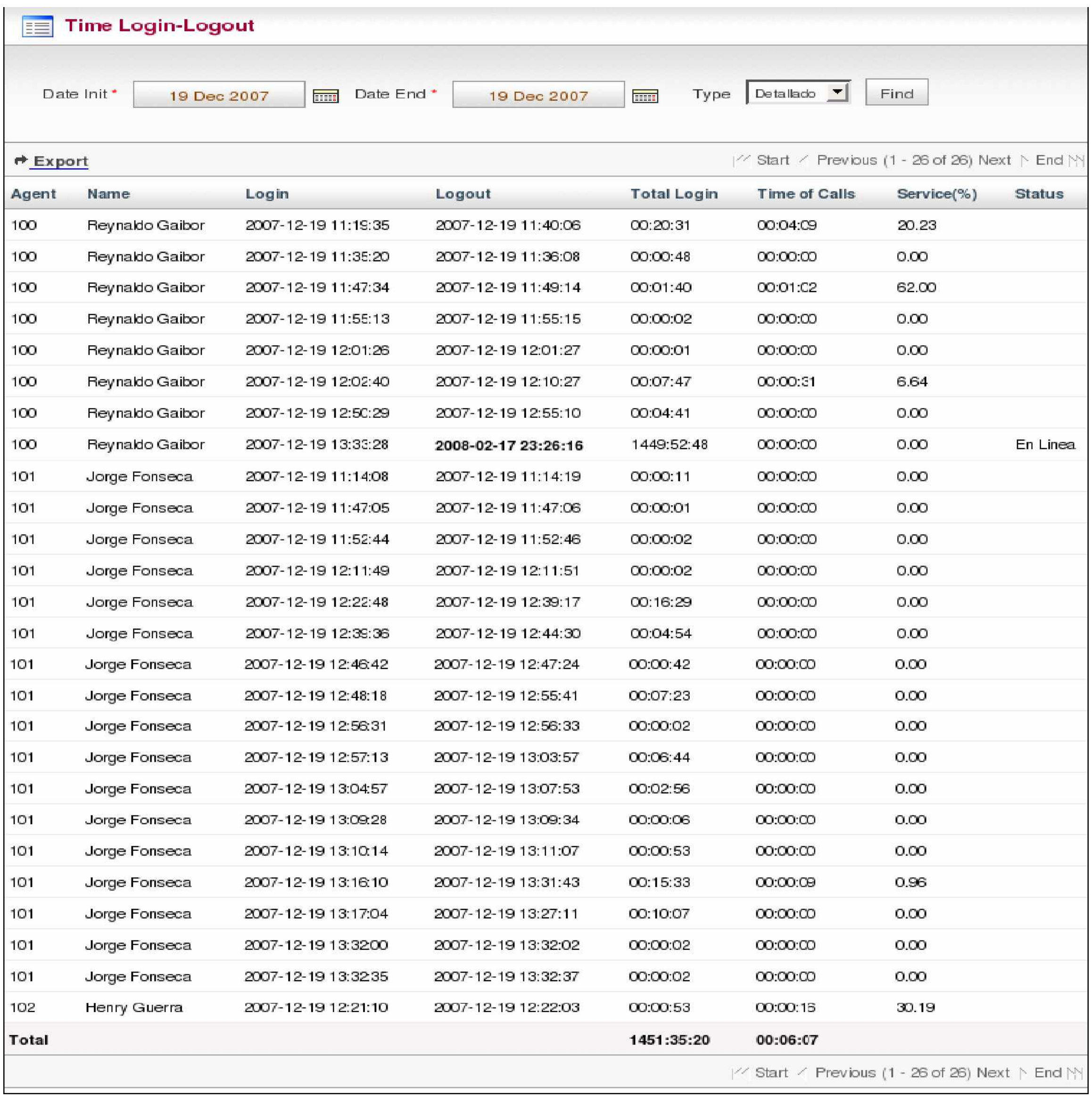
Table: 18

Start Date	Filter Call Start Dates
End Date	Filter Call End Dates
Type	Incoming /Outgoing
Status	All / Successful / Abandoned

Export	Export CSV List of Filtered Calls
Queue	Number of the Queue
0-10, 11-20	Seconds call waited before it was answered
Average Wait Time	Seconds call waited before it was answered
Longest Wait Time	Seconds call waited before it was answered
Total Calls	Total Number of Calls

F) Time Login - Logout

This provides information of an agents activity in the “agent” console, from the time they entered until the time they logged out, measuring the efficiency of the agent **(See Table: 19** for a description of options):



Time Login-Logout

Date Init * 19 Dec 2007 Date End * 19 Dec 2007 Type Detallado Find

Export

Start Previous (1 - 26 of 26) Next End

Agent	Name	Login	Logout	Total Login	Time of Calls	Service(%)	Status
100	Reynaldo Gaibor	2007-12-19 11:19:35	2007-12-19 11:40:06	00:20:31	00:04:09	20.23	
100	Reynaldo Gaibor	2007-12-19 11:35:20	2007-12-19 11:36:08	00:00:48	00:00:00	0.00	
100	Reynaldo Gaibor	2007-12-19 11:47:34	2007-12-19 11:49:14	00:01:40	00:01:02	62.00	
100	Reynaldo Gaibor	2007-12-19 11:55:13	2007-12-19 11:55:15	00:00:02	00:00:00	0.00	
100	Reynaldo Gaibor	2007-12-19 12:01:26	2007-12-19 12:01:27	00:00:01	00:00:00	0.00	
100	Reynaldo Gaibor	2007-12-19 12:02:40	2007-12-19 12:10:27	00:07:47	00:00:31	6.64	
100	Reynaldo Gaibor	2007-12-19 12:50:29	2007-12-19 12:55:10	00:04:41	00:00:00	0.00	
100	Reynaldo Gaibor	2007-12-19 13:33:28	**2008-02-17 23:26:16**	1449:52:48	00:00:00	0.00	En Linea
101	Jorge Fonseca	2007-12-19 11:14:08	2007-12-19 11:14:19	00:00:11	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 11:47:05	2007-12-19 11:47:06	00:00:01	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 11:52:44	2007-12-19 11:52:46	00:00:02	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 12:11:49	2007-12-19 12:11:51	00:00:02	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 12:22:48	2007-12-19 12:39:17	00:16:29	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 12:39:36	2007-12-19 12:44:30	00:04:54	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 12:46:42	2007-12-19 12:47:24	00:00:42	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 12:48:18	2007-12-19 12:55:41	00:07:23	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 12:56:31	2007-12-19 12:56:33	00:00:02	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 12:57:13	2007-12-19 13:03:57	00:06:44	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 13:04:57	2007-12-19 13:07:53	00:02:56	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 13:09:28	2007-12-19 13:09:34	00:00:06	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 13:10:14	2007-12-19 13:11:07	00:00:53	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 13:16:10	2007-12-19 13:31:43	00:15:33	00:00:09	0.96	
101	Jorge Fonseca	2007-12-19 13:17:04	2007-12-19 13:27:11	00:10:07	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 13:32:00	2007-12-19 13:32:02	00:00:02	00:00:00	0.00	
101	Jorge Fonseca	2007-12-19 13:32:35	2007-12-19 13:32:37	00:00:02	00:00:00	0.00	
102	Henry Guerra	2007-12-19 12:21:10	2007-12-19 12:22:03	00:00:53	00:00:15	30.19	
Total				**1451:35:20**	**00:06:07**		

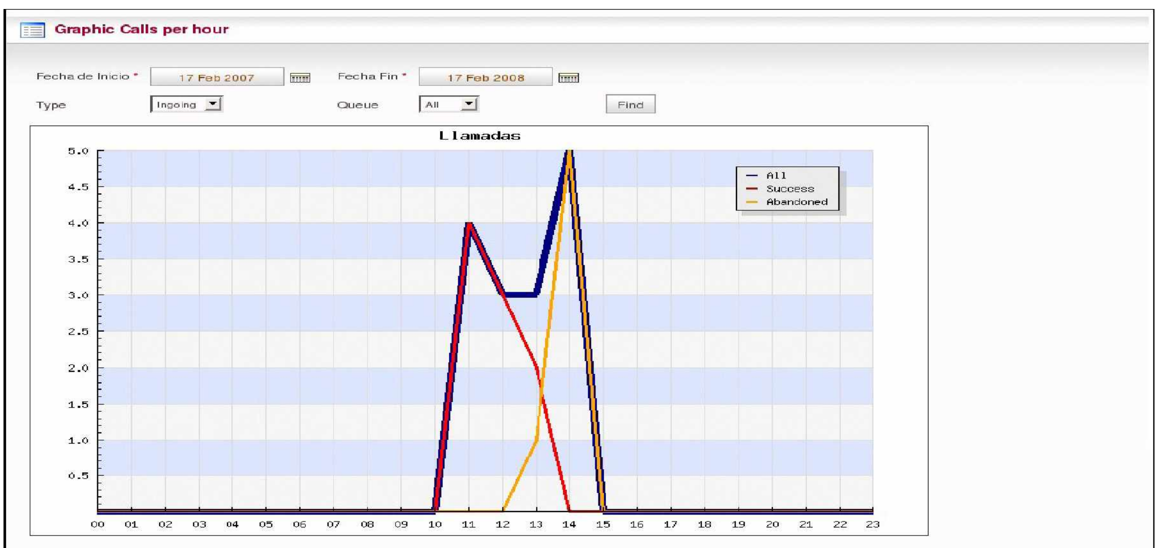
Start Previous (1 - 26 of 26) Next End

Table: 19

Start Date	Filter Call Start Dates
End Date	Filter Call End Dates
Type	Detailed / Summary
Export	Export CSV List of Filtered Calls
Agent Number	Number of the Agent
Agent Name	Name of the Agent
Login	Date and Time of Login
Logout	Date and Time of Logout
Total Login	Total time spent logged in
Total Time	Total time spent making calls
Service %	Measurement of Service
Status	Online /

G) Calls per Hour Graph

The graph displays information on hourly call activity in a graphical form and is defined by each of the queues. It details the number of calls made in each hour (24 hours) and the total number of calls made in the given date range (See **Table: 20** for a description of options):



Queue	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00	Total Calls
791	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	0	0	0	0	0	0	15
8000	0	0	0	0	0	0	0	0	0	0	0	4	3	3	3	0	0	0	0	0	0	0	0	0	15
All	0	0	0	0	0	0	0	0	0	0	0	4	3	3	5	0	0	0	0	0	0	0	0	0	30

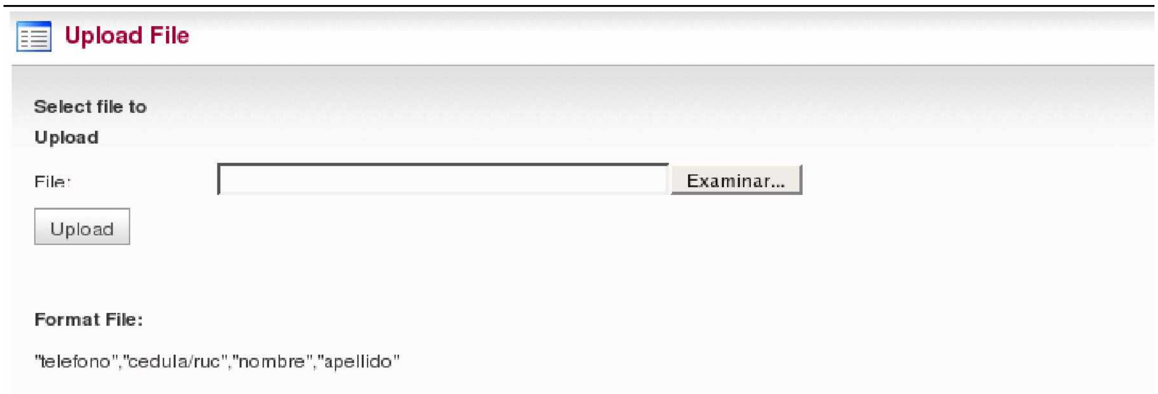
Start Previous (0 - of) Next End

Table: 20

Legend	Blue Line: All Calls Red Line: Called Successful Yellow Line: Calls Abandoned X-Axis: Range of Hours Y-Axis: Number of Calls
Start Date	Filter Call Start Dates
End Date	Filter Call End Dates
Type	Incoming
Export	Export CSV List of Filtered Calls
Queue	Number of the Queue
1:00 / 2:00/ etc…	Total Calls Per Hour
Total Calls	Total Calls made By Queue

1.10. Clients

A) Income Clients
This displays an interface in with the following fields: Select File, browse to the directory that holds the file of customers you wish to upload. The file must have an extension of .CSV or .DOC. (See **Example** Below)



Example:
Customer File Format

"Telephone", "cedula / ruc", "name", "name"
"2289652", "0968956321", "Roxan", "Villacis"
"2369878", "0923589658", "Cesar", "Morales"
....
....
"2372846", "0756910615", "Sarah", "Lopez"