Xtend Call Center Solutions

Browser-based User Interface
Key Features

The purpose of this document is to provide an outline of the browser-based features of Xtend Call Center Solutions. A short description of each feature with its position in the browser interface is available. The reader can click on each feature present under the respective sections - Existing Features and Latest Features to know more about it.

Existing Features

- ISDN Q931 cause code
- Live supervision page
- Supervision page for monitoring live agent status
- Auto upload of lead
- Process logs
- Dialled logs
- Summary - hourly & daily
- Occupancy
- Productivity
- Answered statistics
- Abandoned calls
- Dropped calls
- Call logs
- Agent summary reports
- Call Center Terms & Definitions
- Phone book
- SIP phone
- Upload notes
- Agent hunting/skipping

Latest Features

- Auto email of predefined reports
- New user privilege
- Real time queue management
- Abandoned call management
- Auto downloading of reports
- Duplicate/Inactive data delete
- Add to DND (Do Not Disturb)
- Option for Supervisor to login from Popup
- Color coding for users
- Backup wave path
- NDNC (National Do Not Call) validation
- Process rights for Supervisor

Existing Features

1. **Status of live calls**

   *Process Status → **Live calls***

   Live calls shows the total real-time call information of all the processes along with Call Time, Phone No., Agents, Call Type (*Incoming/Outgoing*) and Call Status (*Ringing/Active*). To monitor the live calls, snoop option is also present (for Supervisors only).

2. **Schedule process according to date & time**

   Process → Process → Add Process & schedule date & time

   The user can schedule a process 'date wise' & 'time wise' during process creation. Also, the user can reschedule an existing process by deactivating that particular process. Options available while scheduling are given below:
   a) Schedule process for future date. It will get activated on the scheduled date.
   b) Provide process start time & end time on a particular day. For example, from 9.30 AM to 6.30 PM everyday.

3. **Voice logging for each call**

   *Process → Process → Select the particular campaign & set **Voicelogging** as **enabled***

   The steps to view the recorded audio files are given below:

   a) Go to *Agent Reports → Call logs.*
   b) Search call logs using different criterion like Agents, Process, Calls From/To, Call Type etc.
   c) Corresponding to each call there will be wave playback.

4. **Call transfer/call conference**

   To enable call transfer and call conference for a particular process, it should be mapped with Process Type as *Call transfer.*

   - Create a new process with **Process Type** as *Call Transfer.*
   - Configure *Call Transfer* process with sufficient channels.
   - Go to **Process → Process Mapping** and select the process that need call conferencing feature & click *Show/Add Process.*
   - Select the process created with **Process Type** *as Call Transfer* and then click ***Update Mapping***.

   After completing the above steps, while in an active call itself, the call can be transferred and made into conference to a third party phone number.

5. **Customised skill based call transfer based on language, department etc.**

   To transfer an incoming call to agents according to language, department or any other skill:

   - Create a process and set **Process Type** as *Interactive.*
   - Select the *Skill based transfer* option and enter the acceptable keys if needed.
   - Set **Transfer Method** of the particular campaign as *Play & Transfer.*
   - Add **welcome wave** and **optional wave** to that particular campaign.
   - Go to **Administration → Skills**.
     By default, there will be a **Skill type** named *Language*. Corresponding to that skill, towards rightmost position there will be a blue coloured icon to view all values assigned to that skill, click on that icon.
   - Set different languages according as per the order given in the wave file. Set these skills for each agents according to priority. To set priority, go to **Administration → User Accounts**. Select the agent and set the particular skill based on priority.

6. **"Mobile login" for agents**

   This facility allows an agent to login to Xtend Call Center using their mobile. The steps to activate mobile login are given below:

   - Create a process with **Process Type** as *Mobile Login*.
   - Configure the created process.
   - Go to **Administration → User Account** and then select the user.
   - Set Mobile Number and Mobile Login PIN number. Make a call to *Mobile Login* process & Login with particular PIN number to use the mobile.

7. **Queue callback**

   Allows to callback those customers who were kept in queue and opted for call back option.

   - Create a process with **Process Type** as *Queue callback.*
   - Go to **Process → Process Mapping.**
   - Select particular process and click ***Show/Add process***.
   - Enable **Queue callback** process from the list and update.
   - Now the callback for that particular process shall be handled by Queue callback process.

8. **Process type "Externally handled"**

   Any call flow other than the predefined ones can be handled though custom written external scripts.

9. **Snooping & barging of live calls**

   To enable web snooping privilege for Supervisor, go to **Administration → Users**. Select the supervisor account and enable the **web snooping** under *live call snoopin*g. Follow the below given steps:

   - Login to Xtend Client application using the Supervisor account.
   - In the same PC, login to the Xtend Call Center browser interface using the same User name and Password. Select the particular call from **Process Status → Live Calls**. Now, Supervisor can enable snooping and barging from Xtend Client application.

10. IVR-based routing that allows conferencing between an agent, customer and third party server

When an agent and customer are in active call, to activate a service for the customer (e.g.: Dialer Tone/Missed Call alerts etc.) a third party server (another IVR) can be taken into conference and customer input is requested (e.g.: Press "1" to confirm activation of service). According to the input, the service is activated for the particular customer.

11. Set retry count for failed dial-outs

Process → Process → Select the particular campaign & set ***No. of dial attempts*** *as needed.*

12. Custom field creation, update and review of updated details

To add custom field for process(es), the **Upload Custom CSV file** should be enabled. Edit the particular process and update '**Upload Custom CSV file**' option of the particular process as '*Yes*'.

- Go to **Process → Features**
- Select particular campaign and set **CRM search** as *Internal* or *External*
- Go to **Process → Custom Fields**
- Select the particular campaign and click on ***View Fields***
- Click ***Add Field*** and create fields by specifying Name, Description, Type, Field length, default value, column index, and all other options, update by clicking ***Add Field.***

Note: Set CRM Search as 'internal' to fetch previous call data from internal CRM.

13. Agent mapping

Allows to map agents with process(es). Agents can be mapped to process(es) only with Agent Transfer method set as *Desired*.

- Edit and update **Agent Transfer** method of the process as ***Desired***.
- Go to **Process → Agent Mapping.**
- Select the process to which agents are to be mapped. Click ***Show/Add Agents***.
- Enable the agents to be mapped to the process and click ***Update Mapping***.

Note: An active process cannot be edited.

14. Agent DLI (Dialed Line Identification) mapping

Agent DLI Mapping can be enabled for process with multiple DLI numbers**.** Also, the Agent DLI Mapping should be set as *needed* in process features. For this,

- Go to **Process → Features**.
- Set **Agent DLI Mapping** as ***needed***.
- Select the sub menu **Process** from the menu **Process**.
- Click ***Process List*** *and c*lick on the icon corresponding to "Process Numbers" and select "Agent DLI Mapping" from the new window.
- Select the particular number and then assign to agents mapped in the campaign.
- Click ***Apply*** to enable the changes.

15. Transfer methods: Transfer on Dial, Transfer on Connect, Play & Transfer and On Key Press

*Process → Process → Select the particular campaign. After setting **Agent Transfer** to **All/Desired**, select any **Transfer method.***

- Transfer on Dial: Call is transferred to an agent when dialout gets initiated.
- Transfer on Connect: Call is transferred to an agent after getting answered by the customer.
- Play & Transfer: Call is transferred to an agent only after a user has assigned wave playback.
- On Key Press: Call is transferred to an agent only when the "Transfer Key" is pressed.

16. Options when agents are busy

If agents are busy, two scenarios are possible:

a) Play sorry (wave file) & terminate
b) Go to Voice mail

*Process → Process → View and edit the process (should be disable) → Set **If agents are busy*** option.

Voice mail can be heard from the dialled logs. Go to Active/Passive reports → *Dialled logs.* Select particular campaign and search after setting **Received voice mail** to *Yes.*

17. Manual & automatic disposition of calls

Process → Process → Select the particular campaign, then click ***View & Edit***. After setting **Agent Transfer** to *All/desired*, select any **Disposition Method** from the next page.

The user can also set **Delay between next calls** while setting **Automatic disposition**.

18. Three types of outbound dial-outs: Preview dial, Lead dial & Push dial-outs

a) Preview dial-out

- Preview dial-out enables an agent to initiate manual dial-out by entering the phone number in Xtend Client popup.
- To set preview dial as needed, go to **Process → Process**. Select Process and click ***View & Edit***, then click ***Next*** and set preview dialing as *Needed*.

b) **Lead dial-out:** A CSV/XLS file with phone numbers to be dialed can be uploaded for a process. This is called as Lead. The system shall automatically dial the numbers in the lead and connect the calls to the agents depending on the transfer method used (*Transfer on Connect / Transfer on Dial*).

- Go to **Process → Add Data** and then select the particular process.
- Click ***Upload Data***. Specify the (CSV/XLS) file to be uploaded. If this lead has to be activated at the time of upload, set **Activate Lead now** to ***Yes***.
- Select ***Upload Data.***

*Note: To review the uploaded data, **Preview** option is also available, where the first 20 numbers can be viewed.*

c) **Push dial**: In this method, uploaded data/lead can be assigned to an agent. An Agent will be provided with the list of phone numbers from the assigned lead in Xtend Client popup. An agent can select the phone number from the list and initiate the dial out.

- Go to **Active Reports → Data.**
- Select the particular process in which push dial should be enabled.
- Click ***Add Data*** in the new window and upload a particular lead.
- Click the icon ***Assign to Agent*** corresponding to a particular lead**.**
- Select the agent and then click ***Assign/UnAssign*** option.
- Open Xtend Client application window in Agent PC.
- Click ***Push Dial*** icon, the assigned phone numbers are listed.

Agent can select the required phone numbers and make calls one after another.

19. Upload Wave File: Welcome wave, Optional wave and Thank you wave

A wave file can be added using the following steps:

- Go to **Process → Add Data** and select the required process.
- Click **Upload Waves**, browse and select the waves to be uploaded.

*Note: The uploaded audio file should be in .wav format and also **Transfer Method** of that particular process should be set as Play & Transfer.*

20. Repeat, Auto and Interactive Callback

a) Repeat call back:

If a customer's incoming call exceeds a particular limit on the same day from the same phone number, then Xtend Call Center shall reject the call and auto callback is assigned for the phone number. When an agent is free, auto callback is initiated.
To set repeat callback, follow the steps given below:

- Go to **Process → Features**
- Select the particular process from the drop-down list and click ***OK***.
- Select **Repeat CallBack** as *needed* and also set **Repeat Boundary**.

b) Auto Callback:

Call Center shall automatically assign a callback to the customer, if he/she waits in the queue for at least 10 secs. To set auto callback, open **Process → Features,** set **Auto CallBack** as *needed*.

b) Interactive Callback:

Customer can choose to remain in queue or press and register a callback. The callback is initiated as soon as a free agent is available. To set interactive callback, go to **Process → Features,** set **Interactive Callback** as needed.

Note: Either Auto Callback or Interactive Callback can be set at a time for a process.

21. Dial proportion

Dial proportion is a feature to dial multiple numbers simultaneously and only the connected calls gets routed to the free agents. This will help to increase the productivity and it works in "Transfer on connect" method. If the user set dial proportion more than one, more calls get dialled for a free agent at a time. In this method, abandoned calls will increase.
Eg. if dial proportion = 3 and free agent = 1, dials initiated = 3×1 = 3
if dial proportion = 2 and free agent = 4, dials initiated = 2×4 = 8

22. Allows callback routing from a process to any other process

Callback from any other process shall be routed to the corresponding process

- Go to **Process → Features**.
- Select the particular process from which callback is needed.
- Set **Allow callback routing to this process** as *Needed* and then click *Update Features.*
- Check the option "Call back" in Xtend Client Application after a call.
- In the drop-down option, user can select the process from which the call back has to be made. The user can also assign callback to another agent along with timing.
- Click "*Dispose Call*".

23. Force logout of agents in case of 'On call Reject' and 'On no answer'

Process *→* ***Features*** *→ Select particular process and set* **Force logout agent** to *On call Reject, On no answer or Both*

24. ACD Algorithm: Longest idle & first disconnect

Process *→* ***Features*** *→ Select particular process and select* **ACD Algorithm** from the drop down list. Automatic call distribution to agents is carried on the basis of two options:

a) **Longest idle:** Transfers the call to an agent with highest idle percentage.
b) **First disconnect:** Transfers the call to an agent first disconnected from a call.

25. Internal/External CRM integration

Internal CRM integration: Internal CRM feature is used to update the entered call details to the default internal CRM of the call center application. By enabling this, it is possible to view the last updated details of a particular number.

- Go to ***Process*** *→* ***features*** *→ s*elect particular process and set **CRM search** as *Internal.*
- Then go to **Process → Custom fields** and set **Update from CRM** to *Internal* for each custom fields corresponding to particular process**.** Custom field data of the last call is fetched when a new call arrives from the same number.
- Updated custom fields data is also available in the process.

External CRM (Customer Relationship Management) integration: This feature allows to update/fetch the call details to/from the external CRM provided by the client.

- *Go to* **Process → Features →** Select particular process and set **CRM search** as *External.*

- Also set the following details:

1. CRM Data link: Specify the Connection String of the CRM database.
2. CRM Table: Enter the name of the CRM table in the CRM database.
3. Phone Number Column: Specify the name of the phone number field.
4. Reverse Phone Number Column: For easy fetching, the phone number must be entered in reverse order. Specify the name of the related field.
5. Order By Column: Specify the sorting process (if needed) like sorting by name, number, location, etc.

26. Server URL posting and Agent External CRM URL along with unified screen

Process → Features → Select particular process.

Server URL posting
Specify the URL for server to server communication under **Server URL posting**.

Agent External CRM URL
Specify the URL which should be invoked from the external popup of Xtend Client. By checking **Unified Screen** option, URL will be shown along with Xtend Client window in a single window.

27. Countwise/Rangewise channel configuration

Configuration of process can be done using two methods - **Countwise** and **Rangewise.**
Go to ***Process → Configuration*** and set desired configuration method.

a) **Countwise:** In this type of configuration, the selected process can be assigned specific number of channels. Enable the required process, enter the number of channels in the "Max Channels to Allocate[30]" (the number of channels depends on license) and click ***Configure*** to save. "Active" window appears on successful configuration
b) **Range-wise:** Specify a starting and ending range for allocating the number of channels. Enable the process and enter the count in "Start Channel" and "End Channel" for the enabled processes, click ***Configure.*** To disable the configuration, click ***Disable All***.

28. DND (Do Not Disturb) for incoming and outgoing calls

- ***Process → DND →*** *Select particular process along with* **Type of DND** *and click on* ***view DND list.***
- Add or upload numbers to be added in DND list.
- DND allows to add/view/update/delete the DND list or the phone numbers present in the list.

29. ISDN Q931 cause code for all failed calls in reports.

For all failed calls, the exact disconnect reason as provided by service provider is also displayed in Call Center Reports.

- Go to **Active/ Passive Reports → *Dialled logs*** → *Select particular process.*
- Search the call details according to specified criterion and **Export** the details**.**

Corresponding to each failed calls Q931 cause code will be displayed.

30. Live supervision page shows Overall call status, Present call status, Agent status in each process along with Engine status and PRI Line status (Supervision → Process*)*

31. Separate agent supervision page for monitoring live agent status (under Supervision menu)(Agents idle, withdrawal stage, On break, On Call, On Hold along with overall agent's status*)*

32. Auto upload of lead

Auto-upload allows to upload a lead automatically to a process at a particular user defined time.

To set Auto-upload, go to **Administration → Auto-upload.**

The user can set upload type as once, recursive or daily once. If the user set upload type as recursive, then he/she has to provide time interval also.
Note: File path of the lead should be in server PC or in shared location.

33. REPORT RELATED FEATURES

The reports in Xtend Call Center is useful for analysing the productivity. Few of the highlighted reports are explained below:

1. **Process Logs** (Active/Passive Reports → Process Logs)
   The process log information includes ***Phone Number, Added On, Status, Call Type, Disposition, Called On*** etc.

2. **Dialed Logs** (Active/Passive Reports → *Dialed* Logs)
   The Dialed Logs include details of selected process like ***Phone Number, Called On, Status, Type, Duration, Accepted key, On Channel, Voice Mail*** etc. with the call log.

3. **Summary - Hourly & Daily (**Process Reports → Summary)
   The summary reports include ***total calls answered, calls dropped, abandoned calls, average speed of answering handling time, hold time, talk time*** and much more related to a particular process. The information also displays the ***calls that have been answered and dropped in the IVR or may have been answered by an agent or abandoned along with the service level of the campaign***.

4. **Occupancy (**Process Reports → Occupancy)
   The report includes ***Agent Name, Calls Offered, Calls Answered, Calls Abandoned, Answered %, Answered before 20 Sec, Abandoned before 20 Sec, Service Level %, ASA (Average speed of answering), AHT (Average handling time), Staff Time, Break Time*** *and* ***Occupancy****.*

5. **Productivity (**Process Reports → Productivity)
   The report displays ***Date, Starting Interval, Time Slot, Calls Landed, Calls Serviced, Number of Agents On Board, Average Number of Calls per Agent, Answered %*** *and* ***Service Level %.***

6. **Answered Statistics**
   This report include details like ***Date, Starting Interval, Time Slot, Calls Landed, Calls*** **Serviced, Calls Abandoned, Avg Talk Time, Max Talk Time, Max Ring Time, Min Ring**

Time, Avg Ring Time, Abandoned %, Answered %, Service Level %, Average Handling Time, Call Ans <= 120 Sec and Call Ans > 120 Sec (the interval (here "120") can be changed while searching the details).

7. **Abandoned Calls** (Process Reports → Abandoned Calls)
   This report include details of calls that were abandoned i.e. rejected by an agent (or) not answered by an agent (or) disconnected from the queue. Abandoned Calls include complete information like **Phone No**, **Added On**, **Call Type**, **Disposition** and **Called On.**

8. **Dropped Calls** (Process Reports → Dropped Calls)
   Report based on dropped calls where agent-based transfer has not been initiated. Report appears with **PhoneNo., Called Time, Call Type** and **Process.**

9. **Call Logs (**Agent Reports → Call Logs)
   Call Logs includes information like **Agent ID, Agent Name, Process, Number, Agent Status, Called On, Start at, End at, Agent Talk Duration** along with voice log for a call.

10. **Agent Summary Reports** (Agent Reports → Call Logs)
   The report displayed include **Agent Name, ACD Calls, ACD Time, Avg TT Time, ACW Time, Avg ACW Time, AHT, Agent Ring Time, Staff Time, Quality, Tea, Lunch, Held Calls, Avg Hold Time, Idle Time and Occupancy**.

CALL CENTER TERMS & DEFINITIONS

1	**ACD** (Automatic Call Distribution) **Calls**	Total transfer initiated calls
2	**ACD Time**	Total call duration of transfer initiated calls
3	**Average TT Time**	(ACD Time - Total Hold Duration) / ACD Calls
4	**ACW** (Agent Call Withdrawal)	Total Agent Call Withdrawal Time of transfer initiated Calls
5	**Average ACW Time**	ACW Time / ACD Calls
6	**AHT** (Average Handling Time)	ACD Time / ACD Calls
7	**Staff Time**	Total Login Duration of Agents on a particular day
8	**Idle Time**	Staff Time - (ACD Time + ACW Time + Break time)
9	**Occupancy**	Percentage of time an agent handles call vs the time agent is available to take the call. (ACD Time * 100 / (Staff Time - Break time))
10	**Abandoned%**	(Total Calls Abandoned * 100) / (Total Calls Answered + Total Calls Abandoned)
11	**Answered%**	(Total Calls Answered * 100) / (Total Calls Answered + Total Calls Abandoned)
12	**Service Level%**	The percentage of calls answered within the time frame specified by the business (Calls Answered In 20 sec / ((Total Calls Answered + Total Calls Abandoned) - Calls Abandoned In 20 sec)) * 100
13	**ASA (Average Speed of Answering)**	Sum of ring duration / Sum of answered calls.

34. Phone book

The contacts can be saved with address using phone book. The phone book comprises of the options: new, search, upload and view option.

35. SIP phone

Integrated SIP phone allows easy call handling and notifies the agent about the incoming/outgoing calls.

36. Upload notes

This option allows to upload notes for each process in HTML/TXT format.

37. Agent hunting/skipping

If an agent doesn't attend the call, it will skip to next agent after a specific interval.

Latest Features

1. Auto-email predefined reports

To set the email option, go to *Process→ Features.*

Auto-email the agent call logs, abandoned reports and agent summary.

2. New user privilege 'Quality Analyser'

Quality Analyser (QA) is the user with access to reports only. In addition to that he/she will have the provision to add remarks and initiate the callbacks for the calls in Agent Call Logs.

3. Real time call queue management

Queue manager is available in popup interface. This option allows to view the calls in queue.

4. Abandoned call management

Abandoned list can be viewed from popup and based on the list dialout can be initiated. If the abandoned calls get connected later, then the status of all the corresponding entries will be marked as success.

5. Auto downloading of reports

Administration→ ***Auto-download***

Automatically download process wise reports such as process logs, dialed logs, agent call logs at scheduled time. Time can be scheduled as daily, once or recursive. The notifications are also mailed to the given email id.

6. Duplicate/Inactive data delete

Two new options has been added while uploading data manually.

- The first is to check for duplicates in files being uploaded.
- The second option checks for records in files with process data - pending/inactive.

The discarded records can be downloaded in .csv format from UI after the upload process.

7. Add to DND/Blacklist from Xtend Client Popup

Agent can add the phone number to DND (outgoing), blacklist (incoming) or both for the current process.

8. Supervisor login monitoring by an Admin

*Supervision → **Supervisor Login***

An option which helps an Admin to oversee the Supervisor's login details.

9. Color coding for users

Administration → User Account

An Admin user can view the other users in different colours with respect to their status (i.e. Admin-Blue, Supervisor-Green, Quality Analyser-Red, Agent-Black) in the user list pulldown.

10. Auto callback

This allows to callback those customers who were kept in queue for at least 10 seconds. Minimum interval for callback and and maximum interval for callback needed on customer disconnection can also be specified separately for auto callback.

11. Backup wave path

Additional wave path can be added to store the voice call logs. To set go to *Process → Features.*

12. NDNC validation

Allows the NDNC standard filtering of numbers. To set go to *Process → Features*.

13. Process Rights for Supervisor

A*dministration → User Account*

Assign process rights to Supervisor in User Accounts. In Supervisor's UI assigned process, details shall be visible.

14. Agent DND

Agent can enable DND from popup to block the respective incoming call and outgoing calls from the uploaded lead. Agent shall receive only those incoming and outgoing calls as well as callbacks which are assigned to him/her.

15. Blocks retry for callback calls

Blocks the retry attempts for callbacks/preview dials assigned by an agent.

16. Bulk data delete

This feature uploads the phone numbers in CSV/XLS file for an existing lead and later these are deleted.

17. Break limit /Break barrier logout

*Administration→ **Break Settings***

- User can add, activate/deactivate break session.
- User can select multiple agents and set break limit and add-on break. Add-on break is a temporary break time extension (resets every day) given to an agent in addition to standard break limit.

18. Wave upload from interface

*Process→ Add Data→ **Upload Waves***

Allows the user to add Welcome wave, Busy wave, Hold wave, Menu wave, Schedule out wave, Holiday wave, Thank you wave, YES/NO wave.

19. Scheduled calls on holidays

Specific day can be set as holiday for the process named "holiday schedule out"..

20. Re-assign calls

This feature allows an Admin or the Supervisor to re-assign the pending/inactive callbacks/preview dials from one agent to another.

21. Schedule calls on Sunday for automatic dialling

Outbound calls can be automatically scheduled on Sunday using this option.

22. Call transfer list

*Administration→ **Call Transfer list***

For third party transfer, an Admin can store phone numbers from interface and agents can access these numbers directly from Xtend Client Popup.