



IP Advantage

Using Call Center, Hunt Group, and Phone Template Features

IP Advantage

Using Call Center, Hunt Group, and Phone Template Features Within the Office Administrator Portal

Version 1.0



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About This Guide

This guide describes how to use the company-wide features available under the Set-Up key of the Office Administrator Portal.

Revision History

Version	Date	Updates and Revisions
1.0	November 2004	First Edition*

**Note: This guide is also included as a section of the Office Administrator User Guide and is identical to the section in that document. It is provided as a separate document for convenience.*

Scope

This document contains an overview of the functionality of the IP Advantage Call Center, Hunt Group, and Phone features within the Office Administrator Portal.

Audience

This document is intended for the following:

- End users of the IP Advantage VoIP Service
- Technical Support and Technical Management

Conventions Used in this Document

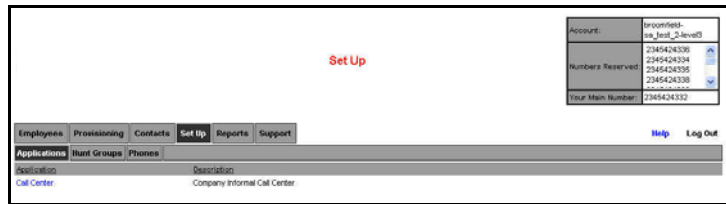
bold	Highlights when a new term is defined. Indicates when a term is referenced for the first time in a chapter and is relevant to new concepts being presented in the chapter.
<i>Italic</i>	Used for emphasis (such as, Enter a <i>unique</i> name). Designates the title of another document (such as, Refer to the <i>Technical Reference Guide</i>).
Click	Refers to actions with the primary mouse button (left on a right-handed mouse).
Verdana font	Refers to elements on the user interface, such as field names, button titles, etc.
Courier New	Indicates a URL or e-mail address.

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Using the Set-Up Tab to Access Call Center and Hunt Group Applications

Within the Office Administrator Portal, the Set Up page shown below lets you configure Call Center, Hunt Groups, and Phone Templates.



From the Set Up tab, you can do the following:

Configure the Call Center

The Call Center lets you create a special telephone number where callers are queued for answering by representatives who enter and exit the group on their own. For example, Call Center can be used for consolidating a customer support group, taking reservations, or making appointments. For customer service, your customers with support contracts can be given a specific support number, which is the Call Center telephone number. Customer support representatives can then check themselves in or out of the Call Center call answering group when they are available to answer calls.

- **Important Note:** The Call Center functionality, available within IP Advantage service, is a limited Call Center feature. It only provides group answering and does not provide features such as queue monitoring and call statistics available with advanced Call Center applications.

Configure Hunt Groups

Hunt Groups let you direct incoming calls to a group of users in sequence. The first number in the Hunt Group rings when a call comes into the Hunt Group telephone number. If there is no answer at the first extension, the next extension rings. The incoming call rings all extensions in the Hunt Group until it is answered or forwarded to voicemail.

Set the Company-Wide Telephone Template

The company-wide telephone template lets you define the type of telephone used by your company and also lets you predefine the feature or speed-dial function of one or more of the programmable buttons on your telephones. For example, you might want everyone in your company to have the number of your travel service set as a speed-dial button on their telephone. You can also use it to set the Call Center log-in and log-out buttons so that they are available for all employees.

- **Note:** The primary difference between the Call Center and the Hunt Group is that the Call Center has one dedicated number which individuals can log into at any time to be available to receive calls. When they are logged into Call Center, calls will supersede the calls to their direct dial number. In the case of the Hunt Group, all calls to the Hunt Group will proceed through a designated list of assigned numbers in the order



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that they were provided. No log-in is required, and all calls to the Hunt Group number will go through this sequence of numbers as long as the Hunt Group is established.



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Call Center

Call Center lets you create a special telephone number where callers are queued for answering by representatives who enter and exit the group as they wish. Call Center can be used, for example, by a customer support group, people taking reservations, or people making appointments. For customer service, your customers with support contracts can be given a specific support number, which is the Call Center telephone number. Customer support representatives can then check themselves in or out of the Call Center call answering group depending on their availability.

With Call Center, you can configure one Call Center number for each company and each number can have up to 32 representatives at any given time. *Only one Call Center number is provisioned per Office Administrator.*

Call Center has the following advantages over Hunt Groups:

- Call Center provides queuing; Hunt Groups do not.
- Call Center allows representatives (extensions) to check themselves in and out of the group at any time using one of the programmable feature buttons on their telephone.
- Members of a Call Center Group can make themselves unavailable at any time. For example, a Call Center representative can become “unavailable” during lunch. The representative does not need to constantly perform the “add and remove” tasks for the Call Center Group.

Setting Up Your Call Center

To configure your Call Center options, follow these steps:

1. Click the **Set Up** tab in the navigation bar. The Set Up page opens with the Applications tab selected.

Account:	broomfield-sa_test_2-level3
Numbers Reserved:	2345424336 2345424334 2345424335 2345424338
Your Main Number:	2345424332

Set Up

Employees Provisioning Contacts **Set Up** Reports Support

Applications Hunt Groups Phones

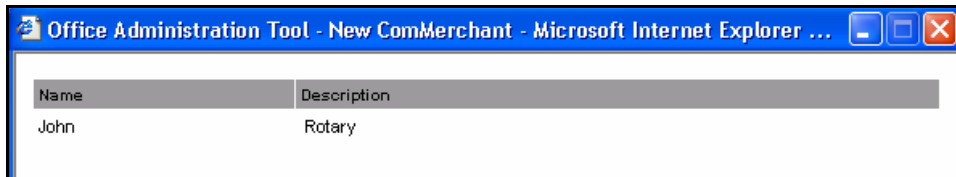
Application	Description
Call Center	Company Informal Call Center

Help Log Out

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2. Click the **Call Center** link under the Applications tab. The New Call Center page opens in a separate window.



From the Call Center tab, you can do the following:

- Add a new Call Center number and configuration if none is currently set, as described in “Adding a Call Center Group.” Each customer can have only one Call Center Group configured.
- Edit the existing Call Center number and configuration, as described in “Editing a Call Center Group.”
- Delete the existing Call Center Group, as described in “Deleting a Call Center Group.”

Call Center Behavior

When a call is made to the Call Center number, callers enter a queue, and the first available extension of those logged into the Call Center Group rings. If there are no available lines, the call will be placed in queue until a line becomes available, or until the pre-determined wait time is reached. When the wait-time is exceeded, the call will then be forwarded to voicemail or any other designated number.

The end result is that you have a call answering group that ensures your customers will get the customer support they need. You can have Call Center routing effective for selected hours of the day. For example, if you state that support services are available between 8 a.m. and 5 p.m. Pacific Standard Time, Monday through Friday, you can make Call Center effective during those hours. While on hold, your customers hear music and a message thanking them for waiting.

***Note:** Call Center ignores the Personal Locator call treatments set on all phones checked into the Call Center Group and on the final destination number. In addition, all calls to the Call Center Group take precedence over other incoming calls to a representative’s phone.*

The following examples illustrate how different calling situations are handled by Call Center:

- If a representative checks into the Call Center Group with his or her Personal Locator treatments set to forward calls to other numbers, Call Center ignores these call treatments and rings the representative’s phone until reaching the time-out period. Call Center then forwards the call to the final destination number.
- If a representative is busy handling a call that came from the Call Center and the representative receives another incoming call (not from Call Center), the second incoming call is handled in accordance with the user’s Personal Locator settings.
- If the final destination number uses Personal Locator to forward calls to another number (such as a cell phone), Call Center ignores this call treatment and continues ringing the final destination number until the call is picked up (by voicemail or by a representative).



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The following table describes Call Center behavior and call destinations in different call situations.

Event	Call Center Behavior	Call Destination
A call comes into the Call Center Group, and one or more representatives are checked in and are available to take a call.	Call Center routes the call to the first available representative.	Extension of the first available representative
A call comes into the Call Center Group, and one or more representatives are checked in, but all representatives are unavailable.	If no representative is available, Call Center places the call in the Call Center queue. As soon as a representative becomes available, the call is routed to the representative's extension. If no representative becomes available within the time limit for putting a call in queue, Call Center routes the call to voicemail after the time limit is exceeded.	Call Center queue or voicemail
A call comes into the Call Center Group, and no representative is checked in.	Call Center routes the call directly to voicemail.	Voicemail
A call comes into the Call Center Group, and representatives are checked in. However, the first available representative is not at his or her desk to take the call.	Call Center routes the call to the first available representative. If the representative does not answer the phone, Call Center changes the status of the representative's extension to "unavailable" and routes the call to the next available representative. If all other representatives are unavailable, the call is queued.	Extension of the next available representative or the Call Center queue if all representatives are unavailable
A representative is checked into the Call Center Group and available to take a call. He first receives a direct call to his extension and then receives a call from the Call Center Group while he is still talking to the first caller.	Because the first call did not go through the Call Center Group, it is not affected by the Call Center, and the representative is still "available." If the representative is next in line for a call from the Call Center, and his phone has two lines, an incoming Call Center call is routed to the representative's second line. If the representative's phone has only one line, Call Center changes the status of the representative's extension to "unavailable," and routes the call to the next available representative. If no other representative is available, the call is queued.	Extension of an available representative, or the Call Center queue
The representative receives a call directly to his extension while he is handling a call from the Call Center Group.	Because the second call did not go through the Call Center, it is not affected by the Call Center.	Extension of the representative – If the representative has a second line, the direct call comes in on it – If the representative has only one line, the second caller either hears a busy signal or is dropped into the representative's voicemail box, if he has one
A number of calls are still in the Call Center queue when the last representative checks himself out of the Call Center Group.	Call Center routes all remaining calls in the Call Center queue to voicemail.	Voicemail



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For more information on using Call Center, refer to the Office Administrator Portal Online Help.

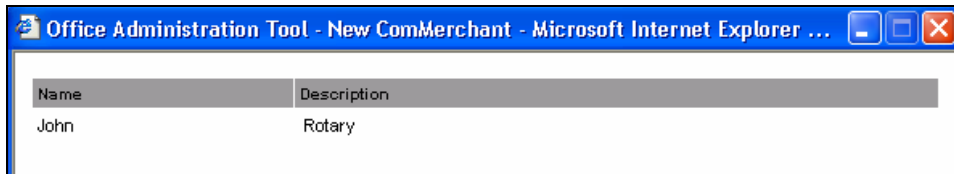
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Adding a New Call Center Group

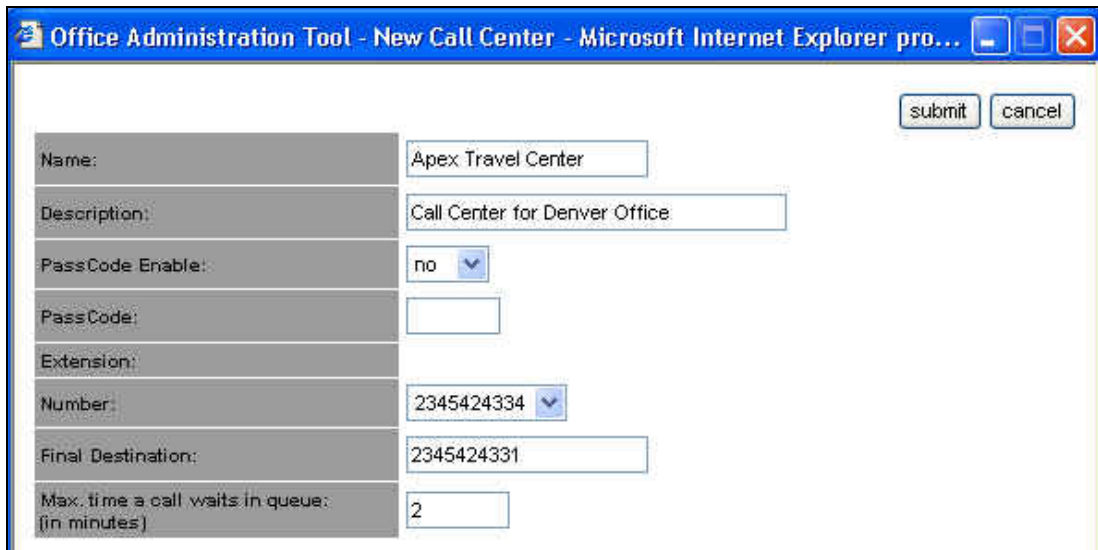
To add a new Call Center Group, follow these steps:

1. Click the **Set Up** tab in the navigation bar, and then click **Call Center** in the Applications tab. The New Call Center page opens.



2. Click **New** on the New Call Center page. The **New** button is only displayed if no Call Center Group has been configured. The **Settings** tab opens.

***Important Note:** A company can have only one Call Center number and associated set-up. Once you have established the Call Center for the company, you can edit all variables, but you will never need to start from the beginning with the **New** button again.*



Office Administration Tool - New Call Center - Microsoft Internet Explorer pro...

submit cancel

Name: Apex Travel Center

Description: Call Center for Denver Office

PassCode Enable: no

PassCode:

Extension:

Number: 2345424334

Final Destination: 2345424331

Max. time a call waits in queue: (in minutes) 2

3. Enter a name for this Call Center Group and a description of the group in the **Name** and **Description** fields.
4. Select Yes or No in the **PassCode Enable** drop-down box (not shown in illustration). If you select No, representatives will not need to enter a passcode when checking into the Call Center Group.
5. If you enabled the passcode, enter a four-digit number in the **PassCode** field. Representatives will then need to enter this passcode on their telephone to check themselves into the Call Center Group.



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6. Enter a unique four-digit extension in the **Extension** field. This is an internal extension and is typically equal to the last four digits of the Call Center phone number that you will give to your customers. However, it can be any number you choose.

Note: Once the extension number is selected, it cannot be changed. Do not use an extension that begins with nine (9). And note also that this probably will be pre-assigned as part of the provisioning of this tenant. Do not change the pre-assigned number if it already appears in this field.

7. Select a phone number from the **Number** drop-down list. This is the number that you will give to customers and others that you want to be queued.
8. Enter a destination for calls that are not answered by any members of your Call Center Group, such as a voicemail extension or another extension (i.e., the Operator or the Auto-Attendant, or even a particular individual who would field the “overflow” calls). You can use this field however it works best for your organization.
9. Enter the maximum number of minutes a call should wait in the queue before rolling to the final destination. The table below shows the recommended value for this setting based on the average number of representatives that will be checked into the Call Center Group at one time and the realistic probability that a representative will become free to answer a call within the designated time.

Number of Representatives	Maximum Time a Call Waits in Queue
1–2 representatives	1 minute
3–6 representatives	2 minutes
7+ representatives	3 minutes

10. Click **Save**.
11. Make sure a check in/check out feature button is created on the phones of the Call Center representatives.

The check in/check out button can be created in one of the following ways:

- Have your Call Center representatives use their User Portal to create their own feature button for check in/check out. Refer to the User Portal Online Help for more information.
- Create a Call Center telephone template that has a check in/check out feature key configured, and assign this template to the Call Center representatives. For more information, refer to “Creating a Telephone Template for Call Center.”

After the check in/check out feature key is created, you can provide the Call Center telephone number to your customers. Calls to the specified number will be routed to the extensions of the employees that are currently checked into the group. While on hold, as a representative’s phone is ringing, your callers will hear music. Also, a message thanking them for holding is played every 30 seconds.



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Call Center Forwarding to a Last Number

Call Center can be set up so that the final destination for an incoming call can be forwarded to voicemail. This is useful if all members of a Call Center are busy with other calls or if it is after hours and no one is available.

To set up the final destination as voicemail, do the following:

1. Obtain the 10-digit number that is the voicemail number for your tenant.

Note: In most cases, this number will be pre-established as part of your tenant. Use the number that has been assigned as your voicemail number to set up the final destination. If you do not have an assigned voicemail number, contact your service provider.

2. In the final destination for the Call Center Group, enter the voicemail number with two zeroes inserted before the 10-digit phone number, so that the number is, for example, 002158889655.

Editing a Call Center Group

You can change the information associated with your Call Center Group at any time from the Set Up page. In the Applications tab, click **Call Center** to open the Call Center page. Then click the name of the Call Center Group to edit the information. The New Call Center page opens.

Note: If you want to change the extension associated with a Call Center Group, you must delete the group and create the Call Center Group again.

Edit the information, and click **update**.

Deleting a Call Center Group

You can delete a Call Center Group at any time from the Set Up page.

1. In the Applications tab, click **Call Center** to open the New Call Center page.
2. Then click the name of the Call Center Group you want to delete. The New Call Center page opens (shown below).
3. Click **Delete**.
4. Confirm that you want to delete the selected Call Center Group by clicking **Yes**.

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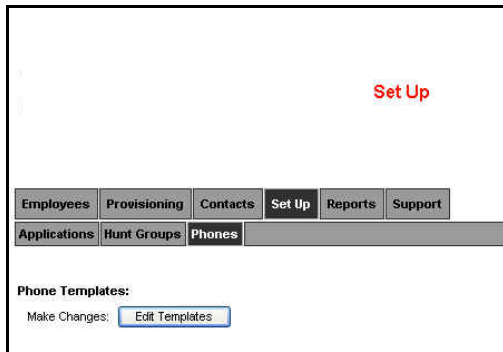
Creating a Telephone Template for the Call Center

*Note: This section is duplicated at the end of this manual within the **Customizing the Telephone Template** section. The two sections are identical, and it is only duplicated here for clarity and convenience for Call Center users.*

After you have added a Call Center Group to the system, you can create a Call Center telephone template that has a check in/out feature button. You can then assign this template to the Call Center representatives. The check in/out button can be assigned only to phones with programmable feature buttons. For this reason, analog phones cannot be programmed with the check in/out button.

To create a telephone template for Call Center, follow these steps:

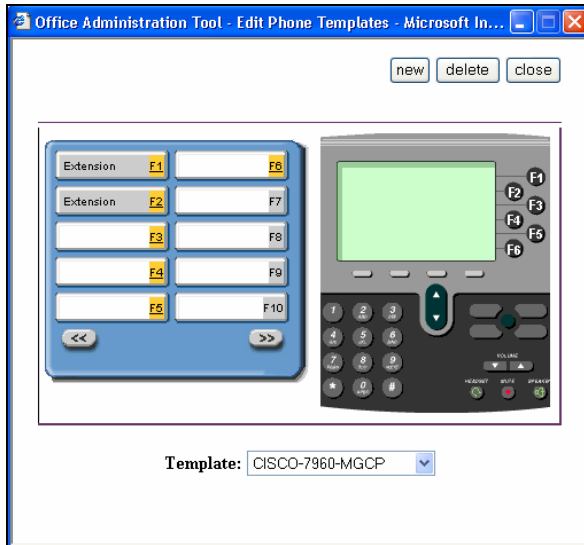
1. On the Set Up page, click the **Phones** tab.



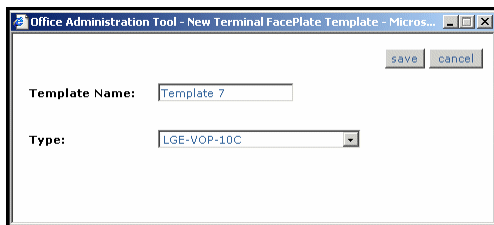
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2. Click **Edit Templates** to create a default telephone template for Call Center. The Edit Phone Templates page opens.



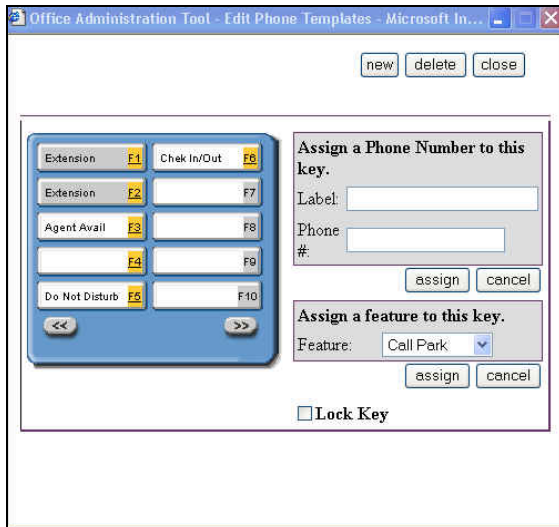
3. Click **New**. The New Terminal Faceplate Template page opens.



4. Enter a name for the template, such as Call Center, and select the phone type. When finished, click **Save**. A confirmation page tells you that the template was created successfully.
5. Click **Close**. The Edit Phone Template page becomes the active window.
6. Click a programmable feature button that you want to use for check in/out. Two buttons are automatically assigned when the check in/out feature is selected. The second Edit Phone Template page opens.

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7. From the **Feature** drop-down box, select **Rep Chk In/Out**.
8. Click **Assign** located below the **Feature** drop-down box.
 - The **Check In/Out** feature button is automatically assigned to the key you selected. In addition, the **Agent Avail** feature button is also assigned to the next available key.
 - After hanging up on a Call Center call, representatives need to press the **Agent Avail** button to make themselves **available** for the next Call Center call.
9. Lock this key if you do not want users to change the key assignment you have selected by checking the **Lock Key** checkbox.
10. Click **Assign**.

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Hunt Groups

You can create Hunt Groups that direct incoming calls to a group of users in series. The first number in the Hunt Group rings when a call comes into the Hunt Group telephone number. If there is no answer at the first extension, the next extension rings. The incoming call rings all extensions in the Hunt Group until it is answered or forwarded to voicemail.

Hunt Groups differ from Call Center Groups in the following ways:

- Hunt Groups do not queue callers. Either the telephone is answered, or the call is sent to voicemail.
- Callers to Hunt Groups do not hear music while they wait.
- Once an extension is added to a Hunt Group, you must remove it from the group. Representatives cannot check themselves in and out of a Hunt Group.

Note: The system ignores a user's Personal Locator call treatments when that user is part of a Hunt Group. This means that if a member of a Hunt Group receives a call that they are not able to pick up, that call is not forwarded to the other numbers specified in the user's Personal Locator settings.

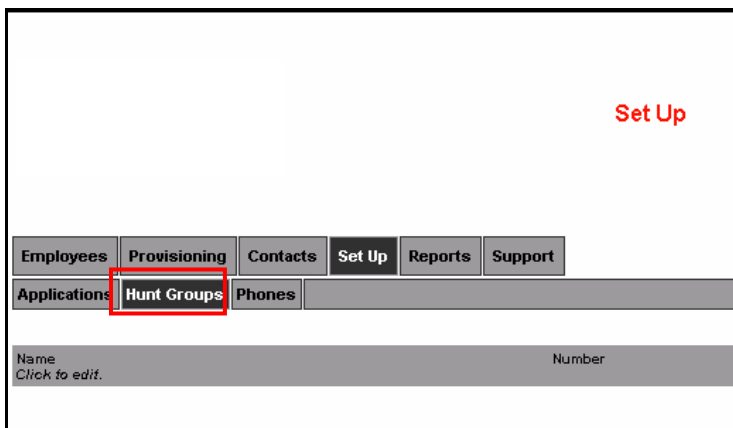
You can create up to 10 Hunt Groups with 32 extensions each, and each group starts at different extension numbers. For example, you can create a Sales Hunt Group, a Marketing Hunt Group, and a Support Hunt Group. Each Hunt Group might start at a different number and calls forward to the specified extensions until the call is answered. Hunt Groups help ensure that important calls are answered by employees.

Creating a Hunt Group

To create a Hunt Group, follow these steps:

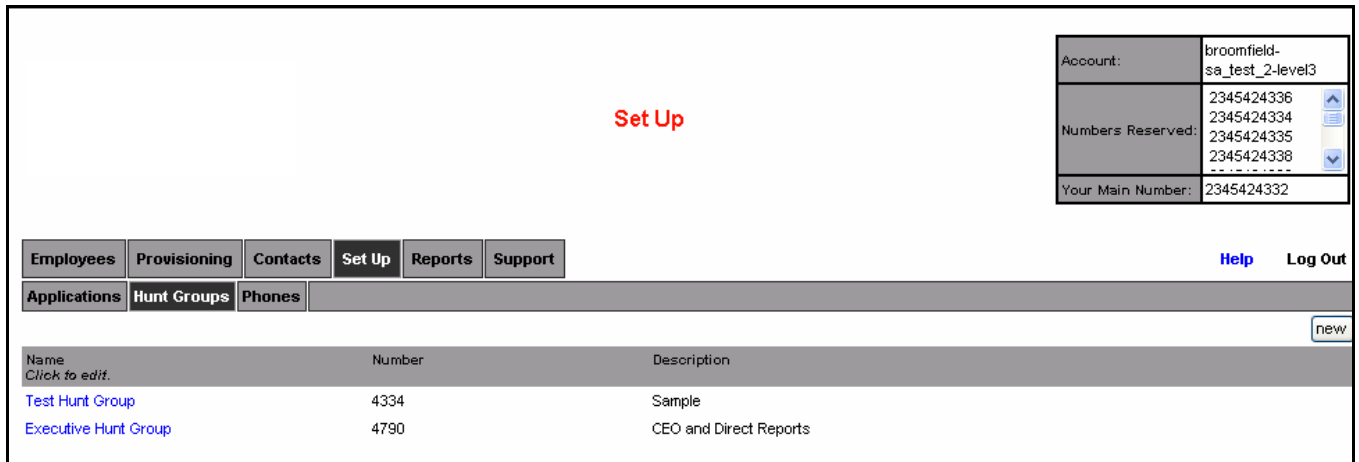
Click **Set Up** in the navigation bar. The Set Up page opens.

1. Click the **Hunt Groups** tab on the Set Up page.



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2. The Hunt Groups tab lists any Hunt Groups you have already created.



Set Up

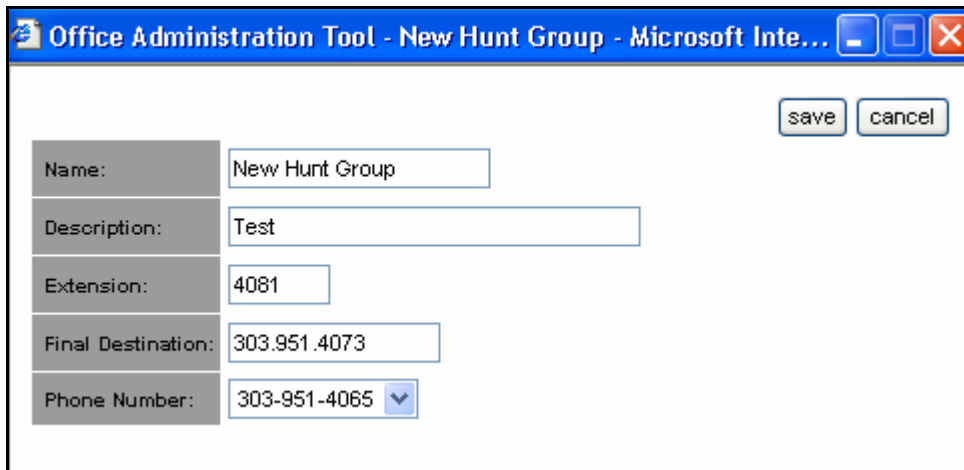
Account:	broomfield-sa_test_2-level3
Numbers Reserved:	2345424336 2345424334 2345424335 2345424338 -----
Your Main Number:	2345424332

[Employees](#) [Provisioning](#) [Contacts](#) **[Set Up](#)** [Reports](#) [Support](#) [Help](#) [Log Out](#)

[Applications](#) **[Hunt Groups](#)** [Phones](#) [new](#)

Name <i>Click to edit.</i>	Number	Description
Test Hunt Group	4334	Sample
Executive Hunt Group	4790	CEO and Direct Reports

3. Click **New** to create a new Hunt Group. The New Hunt Group tab opens.



Office Administration Tool - New Hunt Group - Microsoft Inte... save cancel

Name:
 Description:
 Extension:
 Final Destination:
 Phone Number:

4. Enter the name of the Hunt Group in the **Name** field.
5. Enter a description of the Hunt Group in the **Description** field.
6. Enter an internal extension number that you want to be the start of the Hunt Group in the **Extension** field. Each Hunt Group must be assigned a unique starting extension and the extension cannot begin with nine (9).
7. In the **Final Destination** field, enter the final destination for a caller to the Hunt Group if no one answers. A common final destination number would be a voicemail extension.

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8. Select the telephone number that initiates the Hunt Group from the **Phone Number** drop-down list. Each Hunt Group must have a unique starting number. This is the number you will give callers so they can enter the group to ensure their call is answered by a real person.
9. Click **Save**. The new Hunt Group is now listed in the Hunt Groups tab.
10. Click the name of a Hunt Group in the list to edit the extensions in the group. The Edit Hunt Group page opens.

update delete members: answer order cancel

Name: John's Hunt Group

Description: Test Group

Ext: 4077

Phone Number: 303-951-4077

Final Destination: 303-951-4022

11. Click **Members** to add extensions to this Hunt Group. The Hunt Group Members page opens, listing all employees.

	Name	Phone Number/Ext
<input type="checkbox"/>	Storms , Aaron	2345424336 / 4336
<input type="checkbox"/>	Coar , Mike	2345424335 / 4335
<input type="checkbox"/>	McCormick , John	2345424338 / 4338
<input type="checkbox"/>	Toussaint , Blythe	2345424340 / 4340
<input type="checkbox"/>	Clay , William	2345424339 / 4339
<input type="checkbox"/>	Toussaint Phone , Blythe	2345424337 / 4337

submit cancel



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12. Select the check box next to the name of each employee you want associated with this Hunt Group. Then click **update**. Alternatively, you can assign employees to a Hunt Group using the Settings tab of the New/Edit Employee page as described in “Adding an Employee to a Hunt Group.”

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13. On the Edit Hunt Group page, click **Answer Order** to specify the order in which the Hunt Group extensions ring. The Hunt Group Answer Order page opens, listing the members of this Hunt Group. Hunt Group members are listed in the order that their telephone rings.

		Name	Phone Number/Ext.
#1	↓	Storms, Aaron	2345424336 / 4336
#2	↑ ↓	Coar, Mike	2345424335 / 4335
#3	↑ ↓	McCormick, John	2345424338 / 4338
#4	↑	Clay, William	2345424339 / 4339

save cancel

14. Click the arrows next to the name of an employee to move the employee's name up or down in the list. Then click **save**.

Incoming calls to the Hunt Group telephone number you specified are now routed to the extensions you selected, following the specified order.

Deleting a Hunt Group

To delete a Hunt Group, from the Edit Hunt Group page, click **Delete** to delete the selected Hunt Group. Confirm that you want to delete the selected Call Center Group by clicking **Yes**.

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Customizing the Telephone Template

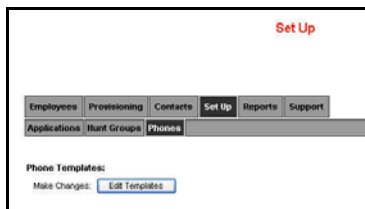
The company-wide telephone template lets you define the type of telephone used by your company and lets you predefine the feature or speed-dial function of one or more of the programmable buttons on your telephones. For example, you might want everyone in your company to have the number of your travel service set as a speed-dial button on their telephone. This also allows you to set the appropriate buttons to log-in and log-out of the Call Center.

Important Note: This feature only functions with MGCP telephones. If you are using a SIP phone, the template cannot be programmed through the Office Administrator, and the template will not appear in the drop-down menu of phones available. All functionality on a SIP phone must be programmed on the phone itself.

Setting or Changing the Corporate Telephone Template

To set or change the telephone template for your company, follow these steps:

1. On the Set Up page, click the **Phones** tab.



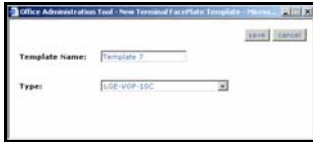
2. Click **Edit Templates** to create a default telephone template for Call Center. The Edit Phone Templates page opens.



3. Click **New**. The New Terminal Faceplate Template page opens.

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4. Enter a name for the template, such as Call Center, and select the phone type. When finished, click **Save**. A confirmation page tells you that the template was created successfully.
5. Click **Close**. The Edit Phone Template page becomes the active window.
6. Click a programmable feature button that you want to use for check in/out. Two buttons are automatically assigned when the check in/out feature is selected. The second Edit Phone Template page opens.



7. From the **Feature** drop-down box, select **Rep Chk In/Out**.
8. Click **Assign** located below the **Feature** drop-down box.

The following table describes the feature button drop-down list options.

Feature Option	Description
Not Assigned	Un-assigns a feature from a feature key. This option is automatically selected in the Feature drop-down list after a contact is assigned to this feature key.
User's Extension	Assign the user's line 1 and line 2 keys. You should lock these two buttons by selecting the Lock Key check box.
Call Park	Lets the user activate the call park feature by pressing the selected feature key and dialing the park-to extension.
Call Pickup	Lets the user pick up a parked call by pressing the selected feature key and entering the parking location.
Rep. Chk In/Out and Agent Avail	Lets the user check in and out of a Call Center Group. When this feature is used, two buttons are reserved on the user's phone, one for Rep. Chk In/Out and one for Agent Avail.
Do Not Disturb	Lets the user set the Do Not Disturb feature.

IP Advantage

Using Call Center, Hunt Group, and Phone Template Features

9. Lock this key if you do not want users to change the key assignment you have selected by checking the **Lock Key** checkbox.
10. Click **Assign**.

11. Click **Close** to close the Edit Phone Templates page.

The buttons you have pre-assigned are grayed out and the speed-dial number or feature is shown in each employee's "My Phone" page.