# CallPilot 150

# Basic Call Center Telephone Administration Guide

**NORTEL NETWORKS**™

# Call Center Telephone Administration Guide

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# Contents

# Chapter 1
# About Basic Call Center for CallPilot 150

This guide leads a Call Center Administrator through setting up and operating Basic Call Center on a CallPilot 150 system. You can program Basic Call Center using any two-line display telephone on your telephone system. You can also use the web-based CallPilot Manager to set up and operate Basic Call Center.

Call Center is an application that handles incoming calls as efficiently and economically as possible. Call Center answers calls, then routes the calls to agents in a skillset that most closely 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 and informative messages.

For information about Basic and Professional Call Center and Call Center features, refer to the *Call Center Set Up and Operation Guide*.

# What Basic Call Center includes

| Features | Basic Call Center for CallPilot 150 |
|---|:---:|
| Number of skillsets | 2 |
| Number of configured agents (available agent IDs) | 20 |
| Number of agent priority levels | 20 |
| Number of active agents | 10 |
| Number of active calls in all skillsets | 15 |
| Maximum number of active calls per skillset | 15 |
| Number of lines that can be configured for Call Center | 15 |
| Number of voice ports (shared with CallPilot or dedicated) | 8 |
| Number of routing tables per skillset | 2 |
| Number of greetings | 10 |
| Number of steps per routing table | 20 |
| Number of skillset mailboxes | 2 |
| Number of supervisors | 10 |
| Supervisor functionality, including call monitoring | Available |
| Day of Week Service: you specify the start times for the day and night skillset for each day of the week | Available |
| Limited Feature 983 telephone administration | Available |

# Related documents

For more information about Call Center refer to the:

- *Nortel Networks Call Center Set Up and Operation Guide*
- *Nortel Networks Call Center Agent Guide*
- *Nortel Networks Call Center Supervisor Guide*
- *Nortel Networks Call Center Reporting Set Up and Operation Guide*

For information about setting up CallPilot refer to the:

- *CallPilot 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:

- *Norstar System Coordinator Guide*

# How to get help

## USA and Canada

### Authorized Distributors - ITAS 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/itas/

**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 or 33 4 9296 1341

**Fax:**
33 49296 1598

**email:**
emeahelp@nortelnetworks.com

## CALA (Caribbean & Latin America)

### Technical Support - CTAS

Telephone:
1-954-858-7777

**email:**
csrmgmt@nortelnetworks.com

## APAC (Asia Pacific)

### Technical Support - CTAS

**Telephone:**
+61 388664627

**Fax:**
+61 388664644

- **email:**
  asia_support@nortelnetworks.com

# Chapter 2
# About Call Center telephone administration

## Setting up Basic Call Center with a two line display telephone

You cannot use a single line display telephone to set up and administer Basic Call Center.You must use a two line display telephone. Two line display telephones show 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 diapad.

**An example of a two line display**



Display command line ——— Skillset 1:Enabled
Display button options ——— SKILL      NEXT

Display buttons ———

## System timeout

If you pause longer than 2 minutes (120 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.

For example, if the system times out before you enter all the settings for a skillset, you must use the procedures in "Changing skillset properties" on page 41 to finish setting up the skillset.

# 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 <u>BKSP</u> display button. |

**Numbers and letters on the dialpad.**

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

The display can show up to 16 characters. Whether the prompt remains on the display depends on the type of prompt that is displayed.

```
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 the pad $\boxed{7}$ 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 in a special font (in the top line of the display) | Pswd: | Command line prompts on display telephones. |
| Underlined word in capital letters (on the bottom line of a two line display telephone) | PLAY | 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 | ☎ | Feature | $F_x$ |
| Handsfree | Bottom right-hand button | Handsfree Mute | Handsfree Mute |
| Hold | 🔽 🔽 | Hold | 🔽 |
| Volume Control | ◀ ─── ◀ | 🔊 🔊 | − ≪   ≫ + |
| Release | ☎ | Rls | 📞 |

You can enter ☎ , Feature or $F_x$ 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.

# Feature codes

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

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 136 to record the Custom Feature Codes.

## To determine the Feature Codes

**1**  Press ⌾ 9 ✳ 1 .

```
Login/out:    F9xx
              NEXT
```

**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.

```
Ready Mode:   F9xx
              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 20.

## To program a memory button

**1**  Press ⌂ ✳ 3 .
   Do not lift your handset.

```
Program Features
```

**2**  The display shows Program Features.

```
Press a button
QUIT
```

**3**  Press a memory button with an LCD indicator.

```
Feature Code:
QUIT
```

**4**  Press ⌂ .

```
F_
QUIT     CLEAR
```

**5**  Enter the Feature Code number that you want to program.
   For example, enter 9 0 9 to program the Display Waiting Calls Feature Code. See the tables "Feature Codes used by Call Center agents and supervisors" on page 17 and "Agent Feature Codes" on page 17 for the Feature Codes.

   Repeat steps 1 through 5 for each Feature Code you want to program.

```
Programmed
```

**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**<br>[☎] [9] [8] [1] | • open skillset mailboxes<br>• record skillset mailbox greetings<br>• listen to messages in the skillset mailbox |
| **Operator Settings**<br>[☎] [9] [8] [2] | • set or change the operator extension<br>• indicate whether the operator is available<br>• select the day and night service modes for skillsets<br>• change the password for Operator Settings<br>For more information on using the Operator Feature Code, refer to "Setting the Service Modes for skillsets" on page 123 and "Resetting the Operator password" on page 131. |
| **Voicemail DN**<br>[☎] [9] [8] [5] | • display the skillset mailbox number (Control DN) for each skillset<br>• display the extension for Message Waiting Indication for the skillset mailbox<br>• reset the passwords of the Call Center Administrator and the operator<br>For information on the Control DN, refer to "Determining a skillset mailbox number" on page 46.<br>For information on resetting the Operator and Call Center Administrator passwords, refer to "Resetting the Call Center Administrator password" on page 26 and "Resetting the Operator password" on page 131. |
| **Display Waiting Calls Skillset Status**<br>[☎] [9] [0] [9] | • view real-time status information about skillsets. You can see how busy your call center is so that you can adjust skillset staffing<br>• view whether a skillset is enabled or disabled<br>• view the number of agents logged on to the skillset<br>• view the number of calls waiting<br>• view the longest wait time of a call<br>To provide easy, one-button access to the this feature, program a memory button that has an indicator with [☎] [9] [0] [9].<br>Refer to "Programming a memory button with a Feature Code" on page 15. |
| **Log on/Log off Monitor skillsets**<br>[☎] [9] [0] [4] | • log agents off if they forget to log off.<br>For information, refer to "Logging an agent off" on page 100. |
| **Not Ready**<br>[☎] [9] [0] [8] | • 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 35. |

➡ **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 17.

# Feature Codes used by Call Center agents and supervisors

If you have Custom Feature Codes, record them in the table "Feature Codes" on page 136.

## 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 16.

| Agents use this Feature Code | To... |
|---|---|
| **Open Mailbox**<br>⌫ 9 8 1 | • access messages in a skillset mailbox |
| **Log on/Log off**<br>**Monitor skillsets**<br>⌫ 9 0 4 | • log on when they are in the office<br>• 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 20. |
| **Not Ready**<br>⌫ 9 0 8 | • 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 telephone 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.<br>• 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**<br>⌫ 9 0 9 | • see, during peak call periods, which skillsets have the most call activity. |

# Chapter 3
# Call Center general properties

To set the Call Center general properties you:

- set the Primary and Secondary alert times
- set the number of Reserved channels
- configure the lines to be answered by Call Center
- set the line answering status

If you do not have Call Center as your primary application, you must enable the Call Center software authorization code.You can also change the Call Center Administrator password if you lose the password or want to change it.

## Enabling the Call Center software authorization code

```
Log:
QUIT    RETRY    OK
```
**1** Press ⟦☎⟧ ⟦9⟧ ⟦8⟧ ⟦3⟧.
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA    OTHR
```
**2** Press ⟦4⟧ ⟦4⟧.
This option does not appear as a display button option.

```
Options admin:
ADD    VIEW
```
**3** Press ADD to display the system identification number
or
press VIEW to view the options that are enabled on the CallPilot system.

```
SN: xxxxxxxxxxx
                OK
```
**4** The display shows the system identification number.
Press OK.

```
Key1:
RETRY          OK
```
**5** Enter the first eight numbers of the Call Center software authorization code and press OK.

```
Key2:
RETRY          OK
```
**6** Enter the second eight numbers of the Call Center software authorization code and press OK.

```
Key3:
RETRY          OK
```
**7** Enter the last eight numbers of the Call Center software authorization code and press OK.

```
Call Center
ACCEPT       QUIT
```
**8** Press ACCEPT to enable the keycode.

```
Enabled
```
**9** The display shows that the software authorization code is enabled.

**10** Press ⟦☎⟧ to end the session.

# Setting Call Center general 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 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 15.

➡ **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 for Call Center, 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

## To set Call Center general properties

```
Log:
QUIT    RETRY    OK
```
**1** Press ⌨ 9 8 3 .
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA    OTHR
```
**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```
**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```
**4** Press OTHR.

```
CC Admin
GRTG    PARM
```
**5** Press PARM.

```
Refresh chans: 1
CHNG          NEXT
```
**6** Press CHNG if you want to change the number of reserved channels (from 0 - 6) and press NEXT
or
press NEXT.

```
Pri alert: xx:xx
CHNG          NEXT
```
**7** Press CHNG to set a Primary Alert time
or
press NEXT and go to step 10.

```
Pri alert mmss:
RETRY
```
**8** Enter the Primary Alert time.
This is a four digit field. Add a zero to any single digit hour or minute.

```
Pri alert: xx:xx
CHNG          NEXT
```
**9** The display shows the Primary Alert time.
Press NEXT.

```
Sec alert: xx:xx
CHNG            OK
```
**10** Press CHNG to set a Secondary Alert time
or
press NEXT and go to step 13.

```
Sec alert mmss:
RETRY
```

**11**  Enter the Secondary Alert time.
This is a four digit field. Add a zero to any single digit hour or minute.

```
Sec alert: xx:xx
CHNG          OK
```

**12**  The display shows the Secondary Alert time.
Press <u>OK</u>.

```
CC Admin
GRTG    PARM
```

**13**  Press ☎ to end the session.

# Configuring lines

Before Call Center can answer an incoming line, you must assign the line to be answered by a Call Center skillset. You can configure a maximum of 15 lines for Basic 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 142.

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. For how to disable a skillset refer to "Disabling a skillset" on page 40.

---

➡ **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 *Norstar System Coordinator Guid*e.

---

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 analog 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 lines for Call Center

```
Log:
QUIT    RETRY    OK
```
**1** Press ⌨ 9 8 3 .
Enter the Call Center Administrator mailbox number and
password, and then press OK.

```
Admin
MBOX    AA    OTHR
```
**2** Press AA.

```
Auto Atdt Admin
GRTG  TABLE  LINES
```
**3** Press LINES.

```
Line number:
RETRY          OK
```
**4** Enter the line number and press OK.

```
Line:x      Ans:No
CHNG          NEXT
```
**5** Press CHNG.

```
Line:x      Ans:AA
CHNG   TABLE   NEXT
```
**6** Press CHNG.

```
Line:x      Ans:CC
CHNG   SKILL   NEXT
```
**7** Press SKILL.

```
Skill number:
RETRY          OK
```
**8** Enter the number of the skillset you want to answer the line and
press OK.

```
Line:x      Skill:1
CHNG   RINGS   NEXT
```
**9** Press RINGS.

```
Line:x    Rings:0
CHNG    ANS    NEXT
```
**10** Press CHNG.

```
No of rings:
RETRY          OK
```
**11** Enter the number of rings and press OK.

```
Line:x    Rings:x
CHNG    ANS    NEXT
```
**12** Press NEXT to configure another line
or
press ☎ to end the session.

# Setting the Answer Lines status

The Answer Lines status determines whether Call Center answers the assigned lines. If the Answer Line status is set toYes, 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:<br>RETRY          OK | **1**  Press `⊘` `9` `8` `2`.<br>Enter the Operator password, and then press <u>OK</u>.<br>The default Operator password is `6` `7` `3` `7` `2` `8` `6` `7`<br>(Operator). To change the Operator password refer to "Resetting the Operator password" on page 131. |
| Choose option<br>OPER        MODE | **2**  Press <u>OPER</u>. |
| Atdt avail:x<br>CHNG        NEXT | **3**  Press <u>NEXT</u> |
| Business open:x<br>CHNG        NEXT | **4**  Press <u>NEXT</u>. |
| Answer lines? N<br>CHNG        NEXT | **5**  Press <u>CHNG</u>.<br>If you set Answer Lines to N the display shows Disabling...<br>If you set Answer Lines to Y the display shows Enabling... |
| | **6**  Press `☎` to end the session. |

# Resetting the Call Center Administrator password

You can reset the Call Center Administrator password by resetting the password to the default password and then creating a new password. You can reset the password to keep the system secure, and to create a new password if you forget the Call Center Administrator password.

If you reset the password, you must log on to the Call Center Administrator mailbox using the default password 0000 and create a new password.

⚠️ **Warning:** Change the System Administrator password frequently to minimize the risk of unauthorized activity. If you reset the Call Center Administrator password, log on to the Call Center Administrator mailbox and create a new password immediately to prevent unauthorized access to the system.

| Default Call Center Administrator Mailbox number and password combinations | | | |
|---|---|---|---|
| For a mailbox number length of... | the default Call Center Administrator Mailbox number is... | and the default Call Center Administrator Mailbox password is... | so the combined mailbox number and password is... |
| 2 | 12 | 0000 | 120000 |
| 3 | 102 | 0000 | 1020000 |
| 4 | 1002 | 0000 | 10020000 |
| 5 | 10002 | 0000 | 100020000 |
| 6 | 100002 | 0000 | 1000020000 |
| 7 | 1000002 | 0000 | 10000020000 |

## To reset the Call Center Administrator password

| Display | Step | Action |
|---|---|---|
| Set ⟨xxxx⟩  OK | **1** | Press ⟨ ✆ ⟩ ⟨9⟩ ⟨8⟩ ⟨5⟩.<br>The Voicemail DN appears on your display. |
| Pswd:<br>RETRY  OK | **2** | Press ⟨9⟩. |
| Pswd:<br>RETRY  OK | **3** | Enter Resetsmpswd or<br>⟨7⟩⟨3⟩⟨7⟩⟨3⟩⟨8⟩⟨7⟩⟨6⟩⟨7⟩⟨7⟩⟨9⟩⟨3⟩<br>and press OK or ⟨#⟩. |
| Reset pswd?<br>YES  NO | **4** | Press YES. |
| Exit | **5** | This display appears. |
|  | **6** | Press ⟨ ✆ ⟩ ⟨9⟩ ⟨8⟩ ⟨1⟩.<br>Log on by following the voice prompts. Use the default password 0000. |

| | |
|---|---|
| Must change Pswd | **7** This display appears briefly to indicate that you must change your password. |

| | |
|---|---|
| Pswd:<br>RETRY                OK | **8** Enter a new password from four to eight digits long that does not start with zero.<br>Press OK or #. |

| | |
|---|---|
| Again:<br>RETRY                OK | **9** Reenter your new password and press OK or #. |

| | |
|---|---|
| Password OK | **10** Press ☎ to end the session. |

# Chapter 4
# 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 record a maximum of 10 Call Center greetings.

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

## 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 tells callers they have reached the correct company. It can also include the location and business hours of your company.<br><br>*"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."* |
| **Please wait greeting** | Please wait greetings encourage callers to stay on the line.<br><br>*"All our agents at Bridgestone Computers are currently busy, but please hold as your call is very important to us."* |
| **Information greeting** | An information greeting provides messages and announcements to callers.<br><br>*"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."* |

| Transfer greeting | A transfer greeting lets a caller transfer their call. |
|---|---|
| | *"Please press 1 to leave a message and one of our agents will return your call. Press 2 to return to the previous choices."* |
| **Non-business hours greeting** | Your non-business hours greeting will be played after your business is closed: |
| | "*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 0. An agent will return your call when we re-open. Thank you for calling.*" |

# 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

```
Log:
QUIT    RETRY    OK
```
**1** Press ⌨ 9 8 3 .
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA    OTHR
```
**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```
**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```
**4** Press OTHR.

```
CC Admin
GRTG    PARM
```
**5** Press GRTG.

```
CC greeting:
RETRY           OK
```
**6** Enter the number of the greeting you want to record and press OK.

```
CC greeting: x
RETRY   PLAY   REC
```
**7** Lift the handset and press REC.

```
Record greeting:
RETRY           OK
```
**8** Record your greeting using the telephone handset.
Do not use handsfree.
When you are finished press OK.

```
Accept greeting?
RETRY   PLAY    OK
```

**9**  Press <u>OK</u> to accept the greeting
or
press <u>PLAY</u> to listen to the greeting
or
press <u>RETRY</u> to re-record the greeting.

```
CC greeting:
RETRY          OK
```

**10** Enter another greeting number and press <u>OK</u> to record another
greeting
or
press 🕿 to end the session.

# 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.

You can have a maximum of two skillsets for Basic Call Center.

You cannot change the properties of a skillset while it is enabled. You must disable the skillset. If you want to change the CDN, disable the skillset and wait until there are no calls in the skillset before you change the CDN.

## 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 configuring lines refer to "Configuring lines" on page 23.

*   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 ⓔ 7 0 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.

*   Calls can be forwarded to the Voicemail 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 *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 must not use" on page 132.

# Skillset properties

| | |
|---|---|
| **Skillset** | The number, either 1 or 2, that is assigned to the skillset. |
| **Control DN** | 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.<br><br>When you assign a CDN to a skillset:<br>• It can be a B1 extension number that is not connected to any telephone or peripheral.<br>• It can be a B2 extension that is not connected to a B2 application.<br>• If a telephone or any other device uses the same extension the call center will not answer calls.<br>• The range of B1 and B2 extensions can be determined by using the Unified Manager. The DNs do not have to be physically equipped with a Media Bay Module.<br>• 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.<br>• Do not rename a telephone DN to a telephone DN used by Call Center.<br>• It is possible for i2004 devices to be assigned to the DN used by Call Center. The user does not receive an error message if this happens, even though i2004 devices usually warn a user if there are conflicting telephone DNs. Therefore, it is imperative that the i2004 programming record contains a list of CDNs used by Call Center.<br><br>Limitations for B1 and B2 extensions:<br>• A B1 extension number is the extension number that you dial to call a telephone or peripheral. A B2 extension is a spare extension that exists with every telephone but is generally not used. Some peripherals use a B2.<br>• Both B1 and B2 extensions can answer external calls.<br>• Both B1 and B2 extensions can have external calls transferred to them by a third person.<br>• 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.<br>• B2 CDNs cannot be used as a prime set for target lines.<br>• Since assigning CDNs does not require additional hardware, we recommend using B1 CDNs over B2 CDNs. B1 CDNs have better functionality than B2 CDNs. |
| **Name** | The skillset name is displayed:<br>• on Call Center displays to identify the skillset<br>• in reports<br>• as the skillset mailbox name<br>The skillset name can be a maximum of 16 characters. If you do not enter a name, the skillset name defaults to *SKILLx* where *x* is the skillset number. The name for each skillset is the same as the skillset mailbox name. |

| | |
|---|---|
| **MWI ext (Message Waiting Indication extension)** | The Message Waiting Indication extension is an optional telephone number that indicates that a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* 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 46. |
| **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: Longest Idle and Preferred. Longest Idle 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 is selected. The default method of call distribution is Longest Idle. |
| **Overflow** | If you enter a time for overflow, a call overflows to the other skillset if the overflow time you set elapses. The default overflow time is 00:00, which means that calls overflow to the skillset mailbox if there are no agents logged on. The maximum overflow time is 59:59. |
| **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 16. 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 presses the Operator key during a greeting step, a transfer step, or while listening to a mailbox greeting. 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. You can choose a language preference only if your system is configured as bilingual. |

# Setting up a skillset

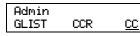You can record skillset properties in the table "Call Center skillsets" on page 137.
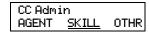
## To set up a skillset

```
Log:
QUIT    RETRY    OK
```

**1** Press ⌨ 9 8 3.
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

**4** Press SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5** Enter the number of the skillset you want to set up and press OK.

```
Status: uninit
SETUP          QUIT
```

**6** Press SETUP.

```
SKILLx
CHNG          NEXT
```

**7** Press CHNG to assign a name to the skillset
or
press NEXT if you do not want to assign a name to the skillset and go to step 10.
If you do not enter a skillset name the skillset name defaults to SKILLx, where x is the skillset number, as shown here.

```
Skillset name:
RETRY    BKSP    OK
```

**8** Enter the skillset name and press OK. For how to enter characters on the dialpad refer to "Using the dialpad" on page 12.

```
xxxx
CHNG          NEXT
```

**9** The skillset name is displayed.
Press NEXT.

```
CDN:
RETRY          OK
```

**10** Enter the CDN of the skillset and press OK.

```
CDN: xx
CHNG          NEXT
```

**11** Press NEXT.

```
MWI ext: xx
CHNG          NEXT
```

**12** If you want to assign an MWI extension, press CHNG
or
if you do not want to assign an MWI extension, press NEXT and go to step 15.

```
Ext:
RETRY          OK
```

**13** Enter the extension of the telephone you want to use for MWI and press OK.

```
MWI ext: xx
CHNG          NEXT
```

**14** Press NEXT.

```
Password
RESET         NEXT
```

**15** Press NEXT.

```
Method: Idle
CHNG          NEXT
```

**16** Press CHNG to change the method of call distribution to Preferred (Prefer) and press NEXT
or
press NEXT to accept the default of Longest idle (Idle).

```
Overflow: 00:00
CHNG          NEXT
```

**17** Press CHNG if you want to specify an overflow time
or
press NEXT and go to step 19.

```
Overflow mmss:
RETRY           OK
```

**18** Enter the amount of time you want to elapse before the call overflows to the other skillset and press OK.

```
Break:  00:30
CHNG          NEXT
```

**19** Press CHNG if you want to change the default Break time
or
press NEXT to accept the default time 00:30 and go to step 21.

```
Break mmss:
RETRY           OK
```

**20** Enter the Break time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.

```
Break: xx:xx
CHNG          NEXT
```

**21** Press NEXT.

```
Delay ans: 00:00
CHNG          NEXT
```

**22** Press CHNG to set up a Delay Answer time
or
press NEXT and go to step 24.

```
Delay ans mmss:
RETRY           OK
```

**23** Enter a Delay Answer time and press OK.
This is a four digit field. Add a zero to any single digit hour or minute.

```
Delay ans: xx:xx
CHNG          NEXT
```

**24** Press NEXT.

```
Atdt: (none)
CHNG          NEXT
```

**25** Press CHNG to assign an attendant to the skillset
or
press NEXT and go to step 27.

```
Ext:
RETRY         QUIT
```

**26** Enter the extension number of the attendant set.

```
Atdt: xx
CHNG          NEXT
```

**27** Press NEXT.

```
Prompt lang: pri
CHNG          NEXT
```

**28** Press CHNG to use the alternate language prompts and press NEXT
or
press NEXT to use the primary language prompts.

```
Mo: 24 hour
CHNG          NEXT
```

**29** Press CHNG to change the service mode for Monday
or
press NEXT.

```
Day start:hhmm
RETRY           OK
```

**30** Enter the Day Routing Table start time and press OK.
This is a four digit field. Add a zero to any single digit hour or
minute.

```
Day hhmm: xxxx
RETRY    AM    PM
```

**31** Press AM or PM.

```
Night start:hhmm
RETRY           OK
```

**32** Enter the Night Routing Table start time and press OK.
This is a four digit field. Add a zero to any single digit hour or
minute.

```
Night hhmm: xxxx
RETRY    AM    PM
```

**33** Press AM or PM.

```
Mo: xxxxa-xxxxp
CHNG    24HR  NEXT
```

**34** The start times for the Day and Night Routing Tables for Monday
are shown.
Press NEXT.

```
Tu: 24 hour
CHNG          NEXT
```

**35** Repeat steps 28 through 33 to set up the Day and Night Routing
Tables for the rest of the week.

**36** Press ☎ to end the session
or
repeat steps 4 through 33 to set up another skillset.

# Enabling a skillset

After you set up a skillset, calls will not be answered until you enable it. If you disable a skillset, no new calls are accepted in the skillset. Calls that are in the skillset are distributed until the calls are ended.

Before you can enable a skillset you must:

• set up the skillset using the procedure "To set up a skillset" on page 36

• initialize and record a greeting for the skillset mailbox using the procedure "Initializing a skillset mailbox" on page 48

• set up the Day and Night Routing Tables using the procedures in Chapter 9, "Routing table administration," on page 103.

## To enable a skillset

```
Log:
QUIT    RETRY    OK
```

**1**  Press ⬚ 9 8 3 .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2**  Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3**  Press CC.

```
CC Admin
AGENT   SKILL   OTHR
```

**4**  Press SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5**  Enter the number of the skillset you want to enable and press OK.

```
Status:Disabled
CHNG          NEXT
```

**6**  Press CHNG to change the status from disabled to enabled.

```
Status:Enabled
CHNG          NEXT
```

**7**  The display shows that the skillset is enabled.

**8**  Press ☎ to end the session.

# Disabling a skillset

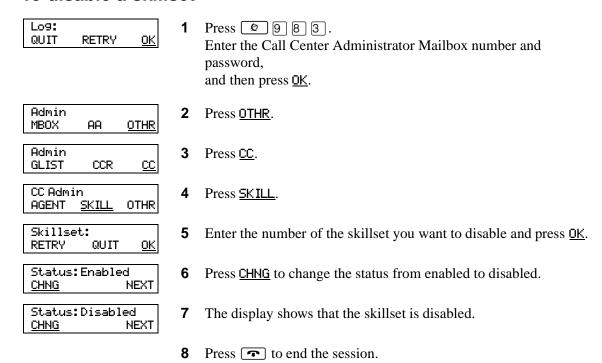You must disable a skillset if you want to change the skillset properties or administer the lines.

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

## To disable a skillset

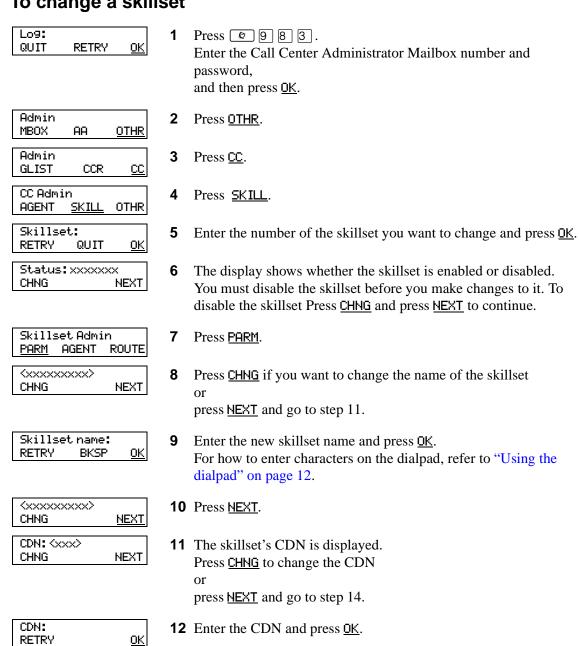| Log:<br>QUIT    RETRY    OK | **1** | Press ⌨ 9 8 3 .<br>Enter the Call Center Administrator Mailbox number and password,<br>and then press OK. |
|---|---|---|
| Admin<br>MBOX    AA    OTHR | **2** | Press OTHR. |
| Admin<br>GLIST    CCR    CC | **3** | Press CC. |
| CC Admin<br>AGENT   SKILL  OTHR | **4** | Press SKILL. |
| Skillset:<br>RETRY    QUIT    OK | **5** | Enter the number of the skillset you want to disable and press OK. |
| Status:Enabled<br>CHNG        NEXT | **6** | Press CHNG to change the status from enabled to disabled. |
| Status:Disabled<br>CHNG        NEXT | **7** | The display shows that the skillset is disabled. |
|  | **8** | Press ☎ to end the session. |

# Changing skillset properties

You cannot change the properties of a skillset while it is enabled. You must disable the skillset. If you want to change the CDN, disable the skillset and wait until there are no calls in the skillset before you change the CDN.

## To change a skillset

```
Log:
QUIT    RETRY    OK
```

**1** Press ☎ 9 8 3 .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

**4** Press  SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5** Enter the number of the skillset you want to change and press OK.

```
Status:xxxxxxx
CHNG            NEXT
```

**6** The display shows whether the skillset is enabled or disabled.
You must disable the skillset before you make changes to it. To disable the skillset Press CHNG and press NEXT to continue.

```
Skillset Admin
PARM  AGENT  ROUTE
```

**7** Press PARM.

```
<xxxxxxxxx>
CHNG            NEXT
```

**8** Press CHNG if you want to change the name of the skillset
or
press NEXT and go to step 11.

```
Skillset name:
RETRY    BKSP    OK
```

**9** Enter the new skillset name and press OK.
For how to enter characters on the dialpad, refer to .

```
<xxxxxxxxx>
CHNG            NEXT
```

**10** Press NEXT.

```
CDN: <xxx>
CHNG            NEXT
```

**11** The skillset's CDN is displayed.
Press CHNG to change the CDN
or
press NEXT and go to step 14.

```
CDN:
RETRY            OK
```

**12** Enter the CDN and press OK.

```
CDN: <xxx>
CHNG            NEXT
```

**13** Press NEXT.

```
MWI ext:<none>
CHNG          NEXT
```

**14** Press CHNG to assign or change an MWI ext
or
press NEXT to accept the default of no MWI and go to step 17.

```
Ext:
RETRY           OK
```

**15** Enter the extension for MWI and press OK.

```
MWI ext:<xxx>
CHNG          NEXT
```

**16** Press NEXT.

```
Password
RESET         NEXT
```

**17** Press RESET to reset the password for the skillset mailbox
or
press NEXT to continue.

```
Method: xxxx
CHNG          NEXT
```

**18** Press CHNG to change the method of call distribution
or
press NEXT.

```
Overflow: 00:00
CHNG          NEXT
```

**19** Press CHNG to change the overflow
or
press NEXT and go to step 21.

```
Overflow mmss:
RETRY           OK
```

**20** Enter the amount of time you want to elapse before the call
overflows to the other skillset and press OK.

```
Break: xx:xx
CHNG          NEXT
```

**21** Press CHNG to change the Break time
or
press NEXT and go to step 23.

```
Break: mmss:
RETRY           OK
```

**22** Enter the Break time and press OK.
This is a four digit field. Add a zero to any single digit hour or
minute.

```
Delay ans: xx:xx
CHNG          NEXT
```

**23** Press CHNG to change the Delay Answer time
or
press NEXT and go to step 26.

```
Delay ans mmss:
RETRY           OK
```

**24** Enter the Delay answer time and press OK.
This is a four digit field. Add a zero to any single digit hour or
minute.

```
Delay ans: xx:xx
CHNG          NEXT
```

**25** Press NEXT.

```
Atdt: (xxxx)
CHNG          NEXT
```

**26** The display shows whether the skillset has an attendant extension
assigned.
Press CHNG to change the attendant extension
or
press NEXT and go to step 29.

```
Ext:
RETRY         QUIT
```

**27** Enter the attendant extension.

```
Atdt: xx
CHNG          NEXT
```

**28** Press NEXT.

```
Prompt lang: xxx
CHNG          NEXT
```

**29** Press CHNG to change the prompt language
or
press NEXT.

```
Mo: 24 hour
CHNG          NEXT
```

**30** The display shows the Monday Routing Table method.
In this example the Routing Table is in 24 hour mode.
Press CHNG to change the Routing Table method
or
press NEXT and go to step 35.

```
Day start:hhmm
RETRY           OK
```

**31** Enter the Day Routing Table start time and press OK.
This is a four digit field. Add a zero to any single digit hour or
minute.

```
Day hhmm: xxxx
RETRY    AM    PM
```

**32** Press AM or PM.

```
Night start:hhmm
RETRY           OK
```

**33** Enter the Night Routing Table start time and press OK.
This is a four digit field. Add a zero to any single digit hour or
minute.

```
Night hhmm: xxxx
RETRY    AM    PM
```

**34** Press AM or PM.

```
Mo: xxxxa-xxxxp
CHNG   24HR   NEXT
```

**35** The display shows the Monday Routing Table start times.
Press CHNG to change the start times and follow steps 31 through
34
or
press 24HR to use 24 hour service for Monday
or
press NEXT to continue.

```
Tu: xxxxa-xxxxp
CHNG   24HR   NEXT
```

**36** The display shows the Tuesday Routing Table method.
In this example the Routing Table has Day and Night Routing
Table start times programmed.

```
Tu: xxxxa-xxxxp
CHNG   24HR   NEXT
```

**37** Press CHNG to change Day or Night RoutingTable start times
or
press 24HR to use 24 Hour mode for Tuesday
or
press NEXT to continue.

```
Mo: 24 hour
CHNG          NEXT
```

**38** The display shows the Wednesday Routing Table method.
Continue to change the Routing Tables start times for each day of
the week.

**39** Press ☎ to end the session.

# Unconfiguring a skillset

If you unconfigure a skillset, you erase the programming for the skillset.You can then reprogram the skillset.

To unconfigure a skillset:

- Disable the skillset and wait until all the calls are distributed.
  Refer to "Disabling a skillset" on page 40.

- Erase the Routing Tables.
  Refer to "Erasing a Routing Table" on page 122.

- Delete agents from the skillset.
  Refer to "Deleting an agent" on page 101.

- Change the line configuration for the skillset if you have assigned a line to the skillset.
  "Configuring lines" on page 23.

- Change the properties for the skillset, including the CDN.
  "Changing skillset properties" on page 41.

# 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:

*   use the primary prompt language
*   maximum message time is 15 minutes
*   maximum message length is three minutes
*   maximum message retention is 30 days
*   maximum greeting length of one minute
*   Off-premise message notification enabled with a retry interval of five minutes and three attempts
*   Outbound Transfer is enabled
*   maximum number of incorrect password attempts is nine
*   password expires in 90 days
*   Networking is enabled if you have the Message Networking option enabled
*   Personal Target Attendant is enabled
*   Record Call is not enabled
*   prompt language is Primary
*   user interface is Norstar Voice Mail

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 46
*   Initialize the skillset mailbox. Refer to "Initializing a skillset mailbox" on page 48.
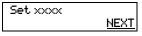*   Record the skillset mailbox greetings. Refer to "Recording skillset mailbox greetings" on page 53.

You can use the table "Skillset mailboxes" on page 140 to record the skillset mailboxes you set up.
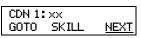
# Determining a skillset mailbox number

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 .

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

**1**  Press ⓔ ⑨ ⑧ ⑤.

```
Set xxxx
            NEXT
```

**2**  Press NEXT.

```
CDN 1: xx
GOTO   SKILL   NEXT
```

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

```
Ext 1: xx
GOTO   SKILL   NEXT
```

**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 the next skillset
or
press GOTO to view another skillset and enter the skillset number.

**6**  Press ⓧ to end the session.

While you use ⓔ ⑨ ⑧ ⑤ you can:

- press ① for GOTO to enter the number of the skillset you want to monitor
- press ② for SKILL to monitor the next enabled skillset
- press ③ or ⑥ for NEXT
- press ④ for PREV to go to previous menu
- press # to go to the next menu
- press * to cancel the session

# Checking which telephone mailbox interface you use

CallPilot supports two interfaces: Norstar Voice Mail and CallPilot.
The Call Center Administrator determines which interface is assigned to the mailbox.

For how to change your mailbox interface refer to:

• the CallPilot Manager Set Up and Operation Guide for how to change your interface using CallPilot Manager

• the CallPilot Telephone Administration Guide for how to change your interface using a telephone

Follow the procedures that apply to the interface you use.
Some procedures apply to both interfaces.

1.  Press ⌨ ⑨ ⑧ ①.

    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.

# Initializing a skillset mailbox

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

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 0 0 0 0 , the default password.

| Must change pswd |
|---|

**3**  This display appears briefly to indicate that you must change the password.

| Pswd: |  |
|---|---|
| RETRY | OK |

**4**  Enter a new skillset mailbox password from four to eight digits long that does not start with zero.
Press OK or # .

| Again: |  |
|---|---|
| RETRY | OK |

**5**  Reenter the skillset mailbox password and press OK or # .

| Record name: |  |
|---|---|
| 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.

| Accept name? |  |  |
|---|---|---|
| RETRY | PLAY | OK |

**7**  Press OK or # to accept the recording
or
press PLAY or 1 to listen to the recording
or
press RETRY or 2 to re-record your name.

| <Skillset name> |
|---|

**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.

**9**  Press ☎ to end the session.

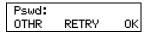# Opening a skillset mailbox

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 ⌨ 9 8 1 .

```
Pswd:
OTHR    RETRY    OK
```

2. Enter the skillset mailbox password and press OK or #
   or
   if you are at another extension, or if you are using a Guest mailbox, press OTHR 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 ⌨ 9 8 1 .

```
Mbox:
RETRY            OK
```

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

```
Pswd:
RETRY            OK
```

3. Enter the skillset mailbox password and press OK 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, enter the digits 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 ⌐ℯ⌐ 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 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 regularly, we suggest every 30 days.

Keep a written copy of the skillset mailbox passwords in "Skillset mailboxes" on page 140. 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 ⌂ 9 8 1 .
   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 8 4 to open the Mailbox Password menu
   • Go to step 4

   If you use the NorstarVoice Mail interface:

   • Press ADMIN or 8
   • Press PSWD or 4
   • Go to step 4

| |
|---|
| Pswd: |
| RETRY       OK |

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

| |
|---|
| Again: |
| RETRY       OK |

**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

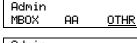You must disable the skillset before you reset the password.

→ **Note:** Reset a password 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 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

```
Log:
QUIT    RETRY    OK
```
**1** Press ✆ 9 8 3.
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```
**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```
**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```
**4** Press SKILL.

```
Skillset:
RETRY    QUIT    OK
```
**5** Enter the number of the skillset whose mailbox password you want to reset and press OK.

```
Status:xxxxxxx
CHNG            NEXT
```
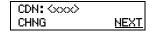**6** The display shows whether the skillset is enabled or disabled. Press NEXT if the skillset is disabled
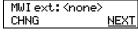or
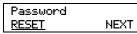press CHNG and then press next if the skillset is enabled.

```
Skillset Admin
PARM  AGENT  ROUTE
```
**7** Press PARM.

```
<xxxxxxxxx>
CHNG            NEXT
```
**8** The display shows the name of the skillset mailbox. Press NEXT.

```
CDN: <xxx>
CHNG            NEXT
```
**9** The display shows the CDN of the skillset mailbox. Press NEXT.

```
MWI ext: <none>
CHNG            NEXT
```
**10** Press NEXT.

```
Password
RESET            NEXT
```
**11** Press RESET to reset the password for the skillset mailbox. The password is reset to 0000.

```
Password reset
```
**12** This display appears briefly.

**13** Press ☎ to end the session.

# 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.

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, telephone 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, telephone number and a brief message. One of our agents will return your call when we re-open on December 27. Thank you.*"

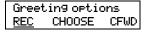## To record a Primary or Alternate skillset mailbox greeting

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

---

<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 NorstarVoice Mail interface:
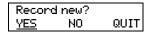
- Press ADMIN or 8
- Press GREET or 2
- Go to step 4

---

Greeting options
REC   CHOOSE   CFWD

---

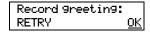4 Press REC or 1.

---

Greeting:
PRIME   ALT   PERS

---

5 Press 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.

---

Not recorded

---

6 If this is the first time you are recording a greeting, this display appears briefly.

---

Record new?
YES   NO   QUIT

---

7 Press YES or 1 and record your greeting at the tone.

---

Record greeting:
RETRY            OK

---

8 Press OK or # to end the recording.

---

Accept greeting?
RETRY   PLAY   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.

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.

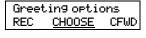## To choose a Primary or Alternate skillset mailbox greeting

1  Press ⌨ 9 8 1 .
   Follow the voice prompts or the display button options on your telephone to open the skillset mailbox.
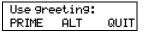
```
<Skillset name>
```

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 NorstarVoice 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 ☎ 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.*"
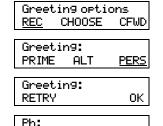
## To record a Personalized skillset mailbox greeting

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 NorstarVoice Mail interface:
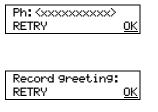
  • Press ADMIN or 8
  • Press GREET or 2
  • Go to step 4

```
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: <xxxxxxxxx>
RETRY          OK
```

**8** Enter the telephone number (maximum 10 digits) that you are assigning the Personalized mailbox greeting to.
Press OK or # to accept the telephone number.

```
Record greeting:
RETRY          OK
```

**9** Lift your handset.
At the tone, record your greeting.
Press OK or # to end the recording.

```
Accept greeting?
RETRY   PLAY   OK
```

**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 mailbox greeting

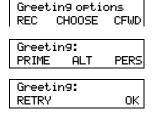If you no longer need a Personalized mailbox greeting, you can delete it.

**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 choose a Personalized mailbox greeting.

```
Greeting:
RETRY          OK
```

**6** Enter the Personalized greeting number that you want to delete.

```
Ph: XXXXXX
CHNG   DEL    OK
```

**7** Press DEL or 2 to delete the greeting.

**8** Press ☎ to end the session.

# 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.
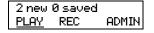
# Playing skillset mailbox messages

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

## To play skillset mailbox messages - NorstarVoice 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 new 0 saved
PLAY   REC    ADMIN
```

**2** Press PLAY or 2 to listen to your messages.
For other options, refer to the table "Playing skillset mailbox messages - Norstar Voice Mail" on page 60.

**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 | 1 or < << | ✔ | | Rewinds the message three seconds and resumes playing it. |
| Copy | 5 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 | 3 3 or > >> > >> | ✔ | | Goes to the end of the message. |
| Envelope | 7 | ✔ | ✔ | 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 | 8 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 61.) |

| Playing skillset mailbox messages - Norstar Voice Mail | | | | |
|---|---|---|---|---|
| **Option** | **Button** | **Available while playing** | **Available after playing** | **Description** |
| Forward | ③ or ≥ >> | ✔ | | Advances the message three seconds and continues playing from that point. |
| 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 STOP/ PLAY | ✔ | | 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 REPLY | ✔ | ✔ | Replies to a message. (Refer to Note 3 on page 62) 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 62.) |
| Save Message | ⑦ ⑦ or SAVE | ✔ | | 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 SAVE on a two line display telephone. (Refer to Note 2 on page 61.) |
| 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 63".
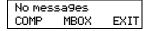
**3** Applies only if the Reply feature is enabled.

**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 "Using the Reply feature to reply to an external caller" on page 66.

## 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 62.) |
| Delete | 7 6 | ✔ | Deletes the current message. Deleted messages remain in the skillset mailbox until the session ends. (Refer to Notes1 and 2 on page 61.) |

# 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.

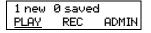Use the procedure for replying to messages that applies to the interface you use:

## Replying to an internal caller

| If you use | and you want to | use |
|---|---|---|
| Norstar Voice Mail | reply to the caller's extension | CALL to transfer to the internal caller's extension. |
| | leave a message in the caller's mailbox | MSG to record and send a reply to the internal caller's mailbox. |
| CallPilot | reply to the caller's extension | Call Sender 9 to transfer to the internal caller's extension. |
| | leave a message in the caller's mailbox | Reply 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 ⓔ 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 ⌨ 9 8 1 .
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 2 to play the current message.

**4** Press 9 to call the caller
or
press 7 1 to record and send a reply.

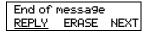## Using the Reply feature to reply to an external caller

You can reply to an external caller using the Reply feature if your company subscribes to a Caller ID service and the skillset mailbox has an outdial method assigned to it. For how to assign an outdial method to a skillset mailbox refer to "Assigning an outdial method to a skillset mailbox" on page 69. Before you use the Reply feature you must play the message.

## 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 a 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 telephone first when there is a message in the skillset mailbox. If there is no answer, Call Center waits five minutes and calls your car telephone again. If there is still no answer, Call Center calls your car telephone a third time. If there is no answer after three calls, Call Center calls your home telephone. 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 telephone 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 an 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* ☐1☐. *If you have received this call by mistake, please press* ☐2☐.

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

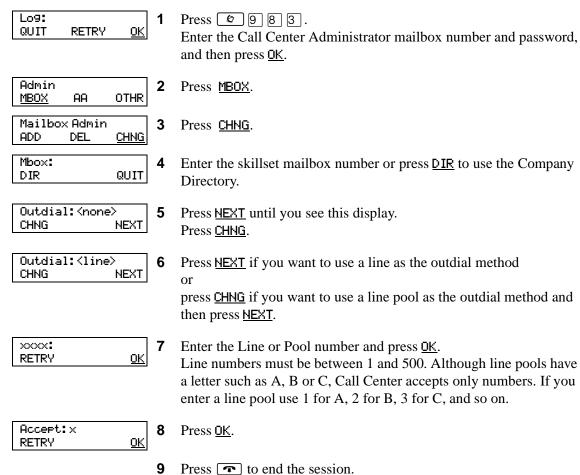# Assigning an outdial method to a skillset mailbox

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

```
Log:
QUIT    RETRY    OK
```
**1** Press ⌨ 9 8 3.
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA    OTHR
```
**2** Press MBOX.

```
Mailbox Admin
ADD    DEL    CHNG
```
**3** Press CHNG.

```
Mbox:
DIR              QUIT
```
**4** Enter the skillset mailbox number or press DIR to use the Company Directory.

```
Outdial:<none>
CHNG            NEXT
```
**5** Press NEXT until you see this display.
Press CHNG.

```
Outdial:<line>
CHNG            NEXT
```
**6** Press NEXT if you want to use a line as the outdial method
or
press CHNG if you want to use a line pool as the outdial method and then press NEXT.

```
xxxx:
RETRY            OK
```
**7** Enter the Line or Pool number and press OK.
Line numbers must be between 1 and 500. Although line pools have a letter such as A, B or C, Call Center accepts only numbers. If you enter a line pool use 1 for A, 2 for B, 3 for C, and so on.

```
Accept:x
RETRY            OK
```
**8** Press OK.

**9** Press ☎ to end the session.

# Off-premise Message Notification parameters

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

The parameters are:

- destination type (phone, extension or pager)
- destination number (phone, extension or pager)
- time range for receiving calls at telephone 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 telephone line also apply to Off-premise Message Notification numbers. For example, if you cannot dial long distance telephone numbers from your telephone, 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 80.

| To set up Off-premise Message Notification to | refer to |
|---|---|
| a telephone number | page 71 |
| an extension | page 73 |
| a pager | page 75 |

## To set up Off-premise Message Notification to a telephone 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 telephone number destination.

```
Ph:
RETRY        OK
```
5 Enter the destination telephone number and press OK or # . The destination telephone number is a maximum of 30 digits.

```
<x>
ADD          OK
```
6 Press OK or # to accept the destination telephone 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.

```
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 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 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        │
└─────────────────────────┘
```

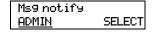**17** Press 📞 to end the session.

## To set up Off-premise Message Notification to an extension
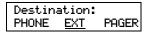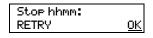
**1** Press ⌨ 9 8 1 .
Follow the voice prompts or the display button options to open the skillset mailbox.

**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

```
Msg 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 <u>AM</u> or ⌈1⌉
or
<u>PM</u> or ⌈2⌉.

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

**12** Press <u>OK</u> or ⌈#⌉ to accept the stop time.

```
More dest?
YES     NO
```

**13** 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.

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

**14** Press <u>NEXT</u> or ⌈#⌉ to accept the start time that you entered
or
press <u>CHNG</u> or ⌈1⌉ to change the start time.

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

**15** Press <u>NEXT</u> or ⌈#⌉ to accept the stop time that you entered
or
press <u>CHNG</u> or ⌈1⌉ to change the stop time.

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

**16** Press <u>OK</u> or ⌈#⌉ if you want to be notified when the skillset mailbox receives a new message
or
press <u>CHNG</u> 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 telephone 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 telephone 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 telephone 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

```
Msg notify
ADMIN  SELECT
```

**3** Press **ADMIN** or ⊡ to set up Off-premise Message Notification.

```
Destination:
PHONE  EXT   PAGER
```

**4** Press **PAGER** or ③ to select a pager number destination.

```
Pager:
RETRY          OK
```

**5** Enter the destination pager number and press **OK** or #.

```
<x>
ADD            OK
```

**6** 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
```

**7** 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 ⊡ to change the pager message.
The combined limit is 30 characters for the pager telephone number and the pager message.

```
More dest?
YES    NO
```

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

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

**9** Press **OK** or # to be notified when the skillset mailbox receives a new message
or
press **CHNG** or ⊡ to change the message type to be notified only when the skillset mailbox receives an urgent message.

```
Msg notify
ADMIN  SELECT
```

**10** Press ☎ to end the session.

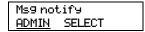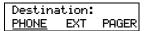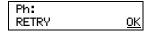## To set up Off-premise Message Notification to more than one destination

You can receive notification of a message at a maximum of five different destination numbers. The following steps show you how to enter a telephone 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 <u>NOTIF</u> or 2 to open the Off-premise Message Notification menu
   - Go to step 3

If you use the Norstar Voice Mail interface:
   - Press <u>ADMIN</u> or 8
   - Press 6 to open the Off-premise Message Notification menu
   - Go to step 3

```
Msg notify
ADMIN  SELECT
```
**3**  Press <u>ADMIN</u> or 1 to set up Off-premise Message Notification.

```
Destination:
PHONE  EXT  PAGER
```
**4**  Press <u>PHONE</u> or 1 to choose a destination telephone number.

```
Ph:
RETRY        OK
```
**5**  Enter the destination telephone number and press <u>OK</u> or # . The destination telephone number cannot be longer than 30 digits.

```
<x>
ADD          OK
```
**6**  Press <u>OK</u> or # to accept the destination telephone 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.

```
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 <u>AM</u> or 1
or
<u>PM</u> 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 telephone
   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 <u>NEXT</u> or ⌗ to accept the start time that you entered
or
press <u>CHNG</u> or 1 to change the start time.

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

**22** Press <u>NEXT</u> or ⌗ to accept the stop time that you entered
or
press <u>CHNG</u> or 1 to change the stop time.

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

**23** Press <u>OK</u> or ⌗ to be notified when the skillset mailbox receives a
new message
or
press <u>CHNG</u> 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 70 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 80

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 telephone to an extension, pager or another telephone number | page 82 |
| from a pager to an extension or telephone | page 84 |
| from a telephone or extension to a pager | page 86 |

## 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

```
Msg notify
ADMIN   SELECT
```

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

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

**4** Press **NEXT**.
If you want to change the destination type refer to "To change the destination type" on page 80 for the appropriate procedure.

```
More dest?
YES     NO
```

**5** Press **NO** or # to continue.

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

**6** Press <u>CHNG</u> or ①  to change the start time
or
press <u>NEXT</u> or #  to accept the start time.

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

**7** Press <u>CHNG</u> or ①  to change the stop time
or
press <u>NEXT</u> or #  to accept the stop time.

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

**8** Press <u>CHNG</u> or ①  to change the message type to urgent.
Press <u>OK</u> 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 📞  to end the session.

## To change the destination from telephone 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 telephone number
destination
or
press EXT or ⟮2⟯ to choose an extension destination
or
press PAGER or ⟮3⟯ to choose a pager number destination.

```
<x>
RETRY          OK
```
**6** Enter the destination number and press OK or ⟮#⟯.
The destination telephone 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:<x>
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 <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.

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

**10** Press <u>CHNG</u> or [1] to change the start time
or
press <u>NEXT</u> or [#] to accept the start time.

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

**11** Press <u>CHNG</u> or [1] to change the stop time
or
press <u>NEXT</u> or [#] to accept the stop time.

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

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

```
Msg notify
ADMIN   SELECT
```

**13** Press [☎] to end the session.

## To change the destination from pager to telephone 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 displays shows 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 telephone 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 <u>CHNG</u> or ⓵ to change the start time
or
press <u>NEXT</u> or ⌗ to accept the start time.

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

**10** Press <u>CHNG</u> or ⓵ to change the stop time
or
press <u>NEXT</u> or ⌗ to accept the stop time.

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

**11** If you want to change message notification,
press <u>CHNG</u> or ⓵ if you want to be notified only when the skillset
mailbox receives an urgent message.
Press <u>OK</u> or ⌗.

```
Msg notify
ADMIN    SELECT
```

**12** Press ☎ to end the session.

## To change the destination from telephone 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 1⃝ to change the pager message.
The combined limit is 30 characters for the pager telephone 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 1⃝ 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
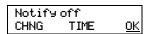    •   Go to step 3

    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

```
Msg notify
ADMIN  SELECT
```
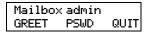3   Press ADMIN or 1 to set up Off-premise Message Notification.

```
Notify1:<x>
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:<x>
DEL   INS   QUIT
```
5   Press DEL to delete the first destination number.

```
Notify1:<x>
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.

```
Msg 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:<x>
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 telephone number" on page 71
   or
   "To set up Off-premise Message Notification to an extension" on page 73
   or
   "To set up Off-premise Message Notification to a pager" on page 75.

# 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
# Setting up 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. You can record your agent programming in the table "Call Center agents" on page 138.

## About adding agents

Basic Call Center includes 20 agents. This is the maximum number of agents you can have for Basic Call Center. 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. Statistics are collected and reported for each ID number. For more information on statistics, refer to "Monitoring call activity" on page 125 and refer to the *Nortel Networks Call Center Reporting Set Up and Operation Guide*. |
| **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 *Agent* and the ID number, for example, *Agent12*. 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 indicates that an agent has supervisor status. A supervisor is an agent with supervisor status. A supervisor has additional capabilities, such as the ability to monitor calls between agents and callers. Supervisors can monitor incoming calls only. Supervisors cannot monitor outgoing calls. |
| **Automatic answer** | Automatic Answer is optional. Select Automatic Answer if you want to force-deliver calls to an agent. <br><br>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. <br><br>If Automatic Answer is not enabled, calls ring at the agent's telephone and the agent must answer calls manually. |

| | |
|---|---|
| **Missed Call Option** | The Missed Call Option controls how a call is treated if an agent does not answer the call. Busy assigns an agent's telephone to respond as it does with the Not Ready feature enabled. Logout automatically logs an agent out of their skillset if they do not answer a call.<br><br>The default is Busy, which returns the call to the skillset. |
| **Agent priority** | When you add agents to Call Center you assign them a priority that represents their level of qualification. The priority can be used to determine which of your agents receives an incoming 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. |

## Adding an agent

```
Log:
QUIT    RETRY    OK
```

**1**   Press ⌕ 9 8 3.
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2**   Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3**   Press CC.

```
CC Admin
AGENT    SKILL    OTHR
```

**4**   Press AGENT.

```
Agent Admin
ADD    DEL    CHNG
```

**5**   Press ADD.

```
Agent ID: x
                OK
```

**6**   The first available agent number is shown.
Press OK.

```
Agent name: _
RETRY    BKSP    OK
```

**7**   Enter the agent's name and press OK.

```
Priority:10
CHNG            NEXT
```

**8**   Press CHNG if you want to change the agent's priority
or
press NEXT and go to step 14.

```
Priority:
RETRY           OK
```

**9**   Enter a priority from 1 to 20 for the agent and press OK.
1 is the highest priority.

```
Supervisor: N
CHNG            NEXT
```

**10**  Press NEXT to keep the agent at agent status
or
press CHNG and then NEXT to give the agent supervisor status.

```
Auto answer:  N
CHNG         NEXT
```

**11** Press NEXT if you do not want calls to be force-delivered to the agent
or
press CHNG and then NEXT if you want calls to be force-delivered to the agent.

```
Miss call:BUSY
LOGOUT   BUSY    OK
```

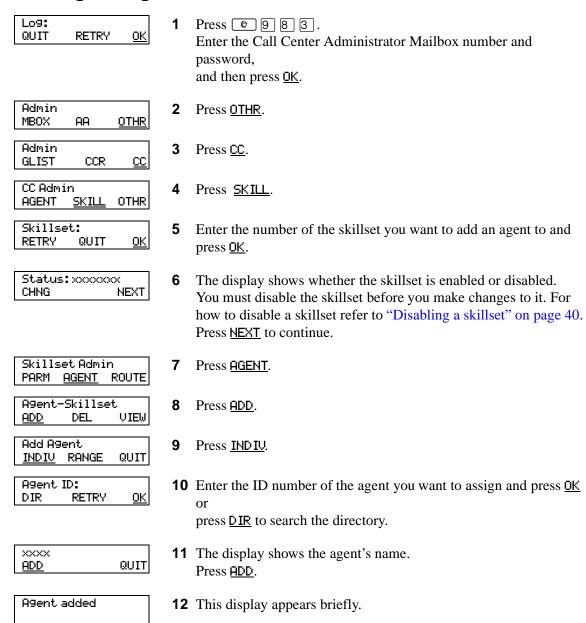**12** Press OK to accept BUSY (Make Agent Busy) as the Missed Call option
or
press LOGOUT to select Automatic Logout and press OK.

```
Agent Admin
ADD     DEL    CHNG
```

**13** Press ☎ to end the session.

# Changing an agent

After you add an agent you can change their properties. You must use this procedure if the system times out while you are adding an agent.

The properties you can change for an agent are:

- password
- display name
- priority
- supervisor status
- auto answer options
- missed call options

```
Log:
QUIT    RETRY    OK
```

**1** Press ⌨ ⑨ ⑧ ③ .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT    SKILL    OTHR
```

**4** Press AGENT.

```
Agent Admin
ADD    DEL    CHNG
```

**5** Press CHNG.

```
Agent ID:
DIR    RETRY    OK
```

**6** Enter the ID number of the agent you want to change and press OK.
If you do not know the agent's ID number press DIR to search the directory.

```
Password
RESET    NEXT
```

**7** Press RESET if you want to reset the agent's password
or
press NEXT.

```
xxxx
CHNG    NEXT
```

**8** Press CHNG if you want to change the agent's name
or
press NEXT and go to step 10.

```
Agent name: _
RETRY    BKSP    OK
```

**9** Enter the new agent's name and press OK.

```
Priority:10
CHNG    NEXT
```

**10** Press CHNG if you want to change the agent's priority
or
press NEXT and go to step 14.

```
Priority:
RETRY         OK
```

**11** Enter a priority from 1 to 20 for the agent and press OK.
1 is the highest priority.

```
Supervisor: x
CHNG        NEXT
```

**12** Press CHNG and press NEXT if you want to change the agent's
supervisor status
or
press NEXT.

```
Auto answer: N
CHNG        NEXT
```

**13** Press NEXT if you do not want calls to be force-delivered to the
agent
or
press CHNG and then NEXT if you want calls to be force-delivered to
the agent.

```
Miss call:BUSY
LOGOUT   BUSY   OK
```

**14** Press OK to accept BUSY (Make Agent Busy) as the Missed Call
Option
or
press LOGOUT to select Automatic Logout and press OK.

**15** Press ☏ to end the session.

# Assigning an agent to a skillset

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

## To assign an agent to a skillset

```
Log:
QUIT    RETRY    OK
```

**1** Press ⬚ 9 8 3 .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT   SKILL   OTHR
```

**4** Press SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5** Enter the number of the skillset you want to add an agent to and press OK.

```
Status:xxxxxxx
CHNG            NEXT
```

**6** The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. For how to disable a skillset refer to "Disabling a skillset" on page 40. Press NEXT to continue.

```
Skillset Admin
PARM   AGENT   ROUTE
```

**7** Press AGENT.

```
Agent-Skillset
ADD     DEL    VIEW
```

**8** Press ADD.

```
Add Agent
INDIV   RANGE   QUIT
```

**9** Press INDIV.

```
Agent ID:
DIR     RETRY    OK
```

**10** Enter the ID number of the agent you want to assign and press OK or
press DIR to search the directory.

```
xxxx
ADD             QUIT
```

**11** The display shows the agent's name.
Press ADD.

```
Agent added
```

**12** This display appears briefly.

```
Add Agent
INDIV   RANGE   QUIT
```

**13** Press ☎ to end the session or
press INDIV to add another agent and follow steps 10 through 13.

# Assigning several agents to a skillset

You can save time by adding several agents to a skillset at once. Agents that are already assigned to the skillset are not added again.

## To assign several agents to a skillset

```
Log:
QUIT    RETRY    OK
```

**1** Press ☏ 9 8 3 .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

**4** Press  SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5** Enter the number of the skillset you want to assign several agents to and press OK.

```
Status:xxxxxxx
CHNG            NEXT
```

**6** The display shows whether the skillset is enabled or disabled. You must disable the skillset before you make changes to it. For how to disable a skillset refer to "Disabling a skillset" on page 40. Press NEXT to continue.

```
Skillset Admin
PARM  AGENT  ROUTE
```

**7** Press AGENT.

```
Agent-Skillset
ADD    DEL    VIEW
```

**8** Press ADD.

```
Add Agent
INDIV  RANGE  QUIT
```

**9** Press RANGE.

```
Start agent:
RETRY            OK
```

**10** Enter the ID number of the first agent you want to assign and press OK.

```
End agent:
RETRY            OK
```

**11** Enter the ID number of the last agent you want to assign and press OK.

```
x added
```

**12** This display appears briefly.

```
Add Agent
INDIV  RANGE  QUIT
```

**13** Press ☎ to end the session.

# Removing agents from a skillset

You can remove an agent from a skillset. When you remove an agent, they are removed from the skillset but not from Call Center. You can assign the agent to another skillset.

```
Log:
QUIT    RETRY    OK
```

**1** Press ⌨ 9 8 3.
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT   SKILL   OTHR
```

**4** Press SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5** Enter the number of the skillset you want to remove an agent from and press OK.

```
Status: xxxxxxx
CHNG            NEXT
```

**6** The display shows whether the skillset is enabled or disabled.
The skillset must be disabled before you can delete an agent from it. For how to disable a skillset refer to "Disabling a skillset" on page 40.
Press NEXT to continue.

```
Skillset Admin
PARM   AGENT   ROUTE
```

**7** Press AGENT.

```
Agent-Skillset
ADD     DEL     VIEW
```

**8** Press DEL.

```
Agent ID:
DIR     RETRY    OK
```

**9** Enter the ID number of the agent you want to remove and press OK.

```
xxxx
DEL             QUIT
```

**10** The display shows the agent's name.
Press DEL.

```
Agent deleted
```

**11** This display appears briefly.

**12** Press ☎ to end the session.

# Viewing agents in a skillset

You can review the agents in a skillset.

```
Log:
QUIT    RETRY    OK
```

**1**  Press ⌨ 9 8 3 .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2**  Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3**  Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

**4**  Press  SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5**  Enter the number of the skillset you want to view and press OK.

```
Status: xxxxxxx
CHNG            NEXT
```

**6**  The display shows whether the skillset is enabled or disabled.
Press NEXT to continue.

```
Skillset Admin
PARM  AGENT  ROUTE
```

**7**  Press AGENT.

```
Agent-Skillset
ADD    DEL    VIEW
```

**8**  Press VIEW.

```
x: xxxx
NEXT    PREV    QUIT
```

**9**  The display shows the agent with the lowest ID number in the skillset. You can press NEXT to see the next agent or PREV to see the previous agent.

**10**  Press ☎ to end the session.

# Logging an agent off

```
Log:
QUIT    RETRY    OK
```

**1** Press ⌂ ⑨ ⑧ ③ .
Enter the Call Center Administrator Mailbox number and password,
and then press O̲K̲.

```
Admin
MBOX    AA    OTHR
```

**2** Press O̲T̲H̲R̲.

```
Admin
GLIST    CCR    CC
```

**3** Press C̲C̲.

```
CC Admin
AGENT    SKILL    OTH
```

**4** Press A̲G̲E̲N̲T̲.

```
Agent Admin
ADD    DEL    CHNG
```

**5** Press ⑧ . This option does not appear as a display button option.

```
Agent ID:
OK
```

**6** Enter the agent's ID number and press O̲K̲.

```
xxxx
OUT         QUIT
```

**7** The agent's name is displayed.
Press O̲U̲T̲.

**8** Press ☎ to end the session.

# Deleting an agent

```
Log:
QUIT    RETRY    OK
```
**1** Press ☎ 9 8 3.
Enter the Call Center Administrator Mailbox number and password, and then press OK.

```
Admin
MBOX    AA      OTHR
```
**2** Press OTHR.

```
Admin
GLIST   CCR      CC
```
**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```
**4** Press AGENT.

```
Agent Admin
ADD    DEL    CHNG
```
**5** Press DEL.

```
Agent ID:
DIR    RETRY    OK
```
**6** Enter the agent's ID number and press OK
or
press DIR to search the directory.

```
xxxx
DEL            QUIT
```
**7** The agent's name is displayed.
Press DEL.

```
Agent deleted
```
**8** The display shows the agent is deleted.

**9** Press ☎ to end the session.

# Resetting an agent password

```
Log:
QUIT    RETRY    OK
```

**1** Press ⌨ 9 8 3 .
Enter the Call Center Administrator Mailbox number and password,
and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST   CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

**4** Press AGENT.

```
Agent Admin
ADD      DEL    CHNG
```

**5** Press CHNG.

```
Agent ID:
DIR    RETRY    OK
```

**6** Enter the ID number of the agent you want to change and press OK.
If you do not know the agent's ID number press DIR to search the directory.

```
Password
RESET         NEXT
```

**7** Press RESET to reset the agent's password.

**8** Press ☎ to end the session.

# Chapter 9
# Routing table administration

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, 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 141.

> **Note:** You can add steps to a routing table only when you set it up. After you set up the table, you cannot add or delete steps.You can modify steps.

## 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 to 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 CallPilot 150

1   From a Norstar telephone, set up a DID target line.
    For information about setting up a DID target line refer to the *Norstar System Coordinator Guide.*

2   Configure the target line number to be answered by Call Center.
    For information about configuring lines refer to "Configuring lines" on page 23.

# 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 to detect 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.

# 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** | 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.<br><br>The minimum distribution time is zero and the maximum distribution time is 59 minutes and 59 seconds. The default distribution time is 30 seconds. |
| **Goto** | A Goto step is the last step in a routing table. A Goto step moves the caller to an earlier routing step.<br><br>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 decides to leave a message in the skillset mailbox.<br><br>The first step in a routing table cannot be a Goto step because there are no possible target steps yet.<br><br>A Goto step cannot point to itself. A Goto step can only point to any previously created step. |
| **Transfer** | A transfer step can transfer calls to:<br>• an extension<br>• a mailbox<br>• an external number<br>• the Automated Attendant<br>• an operator<br>• 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. |

# Adding a Greeting step

Greeting steps play a message to waiting callers. You must have a greeting recorded before you can use it in a Greeting step. For how to record a Call Center greeting refer to "Recording a Call Center greeting" on page 30.

## 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 104.

| | |
|---|---|
| **Forced Play** | 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. |
| | If you do not enable Forced Play, when an agent becomes available the greeting is interrupted and the call goes to the available agent. |
| | 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 128. |
| **Intelligent Caller Input Routing, Basic (Xfer)** | While the greeting plays callers can:<br>• press ☐1 to transfer to the Automated Attendant<br>• press ☐0 to transfer to the Operator<br>• press ☐9 to leave a message in the skillset mailbox<br>• press ☐2 to transfer to a CCR Tree |
| | 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. |
| **No Intelligent Caller Input Routing (Norm)** | 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. |

## To add a Greeting step

```
Log:
QUIT    RETRY    OK
```

**1** Press ⌨ 9 8 3 .
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT    SKILL    OTHR
```

**4** Press SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5** Enter the number of the skillset you want to add a Greeting step to and press OK.

```
Status:xxxxxx
CHNG    NEXT
```

**6** If the skillset is enabled, press CHNG to disable it.
Press NEXT.

```
Skillset Admin
PARM    AGENT    ROUTE
```

**7** Press ROUTE.

```
Route Table
DAY    NIGHT    QUIT
```

**8** Press DAY or NIGHT.
In this example, Day is shown.

```
Day routing
SETUP    QUIT
```

**9** Press SETUP.

```
Step 1
DIST    GRTG    OTHR
```

**10** Press GRTG.

```
CC greeting:x
RETRY    OK
```

**11** Enter the number of the greeting you want to use and press OK.

```
CC greeting:x
RETRY    PLAY    OK
```

**12** Press OK.

```
Type: Norm
Force    XFER    OK
```

**13** Assign the parameters for the Greeting step:

- If you want to use Norm, press OK and go to step 29.
- If you want the Greeting to be forced, press Force, press OK and go to step 29.
- If you want the Greeting to be forced and callers to be able to transfer after the greeting, press Force, press XFER and go to step 14.
- If you want callers to be able to transfer during the Greeting, press XFER and go to step 14.

```
AA Key:1
CHNG   DISABL NEXT
```

**14** The display shows the default key for the Automated Attendant.
Press CHNG if you want to change the key that callers press to reach the Automated Attendant
or

```
AA Key:disable
CHNG        NEXT
```

press DISABL if you do not want callers to be able to press a key to reach the Automated Attendant, press NEXT and go to step 17
or
press NEXT to accept the default key and go to step 17.

```
AA Key:
RETRY        OK
```

**15** Enter the key you want to assign for the Automated Attendant and press OK.

```
AA Key:x
CHNG   DISABL NEXT
```

**16** Press NEXT.

```
Oper Key:0
CHNG   DISABL NEXT
```

**17** The display shows the default key for the Operator.
Press CHNG if you want to change the key that callers press to reach the Operator
or
press DISABL if you do not want callers to be able to press a key to reach the Operator, press NEXT and go to step 20
or
press NEXT to accept the default key and go to step 20.

```
Oper Key:
RETRY        OK
```

**18** Enter the key you want to assign for the Operator and press OK.

```
Oper Key:x
CHNG   DISABL NEXT
```

**19** Press NEXT.

```
Mbox Key:9
CHNG   DISABL NEXT
```

**20** The display shows the default key for the skillset mailbox.
Press CHNG if you want to change the key that callers press to reach the skillset mailbox
or
press DISABL if you do not want callers to be able to press a key to reach the skillset mailbox, press NEXT and go to step 23
or
press NEXT to accept the default key and go to step 23.

```
Mbox Key:
RETRY        OK
```

**21** Enter the key you want to assign for the skillset mailbox and press OK.

```
Oper Key:x
CHNG   DISABL NEXT
```

**22** Press NEXT.

```
CCR Key:2 Tr:1
CHNG    DISABL    OK
```

**23** The display shows the default key for a CCR Tree.
Press CHNG if you want to change the key that callers press to reach
the CCR Tree
or
press DISABL if you do not want callers to be able to press a key to
reach the skillset mailbox, press NEXT and go to step 29
or
press OK to accept the default key and go to step 29.

**Note:** You cannot let callers transfer to a CCR Tree unless you
have created a CCR Tree. Refer to the *CallPilot Telephone
Administration Guide* or the *CallPilot Manager Set Up and
Operation Guide.*

```
CCR Key:
RETRY           OK
```

**24** Enter the key you want to assign for the CCR Tree and press OK.

```
CCR Key:x
CHNG          NEXT
```

**25** Press NEXT.

```
CCR tree:
RETRY           OK
```

**26** Enter the number of the CCR Tree you want callers to transfer to
and press OK.

```
CCR Key:x Tr:x
CHNG    DISABL    OK
```

**27** Press OK.

```
Type: Norm
Force    XFER    OK
```

**28** Press OK.

```
Another step?
YES           QUIT
```

**29** Press YES to continue to build the table
or
press ☎ to end the session.

If you want to continue to add steps to the table:

- To add a Distribute for step, start at step 10 of "Adding a Distribute for step" on page 110.
- To add a Goto for step, start at step 10 of "Adding a Goto step" on page 111.
- To add a Transfer step, start at step 10 of "Adding a Transfer step" on page 112.
- To add a Disconnect step, start at step 10 of "Adding a Disconnect step" on page 114.

→ **Note:** You can add steps to a routing table only when you set it up. After you set up the
table, you cannot add or delete steps.You can only modify the steps that you created. If
you have set up a routing table and you want to add or remove steps, you must erase the
table and create it again.

# Adding a Distribute for step

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

```
Log:
QUIT    RETRY    OK
```

**1** Press ⟨🕭⟩ ⟨9⟩ ⟨8⟩ ⟨3⟩.
Enter the Call Center Administrator mailbox number and
password, and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST   CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```

**4** Press SKILL.

```
Skillset:
RETRY   QUIT    OK
```

**5** Enter the number of the skillset you want to add a Distribute step to
and press OK.

```
Status: xxxxxx
CHNG           NEXT
```

**6** If the skillset is enabled, press CHNG to disable it.
Press NEXT.

```
Skillset Admin
PARM   AGENT  ROUTE
```

**7** Press ROUTE.

```
Route Table
DAY    NIGHT   QUIT
```

**8** Press DAY or NIGHT.
In this example, Day is shown.

```
Day routing
SETUP          QUIT
```

**9** Press SETUP.

```
Step  x
DIST   GRTG   OTHR
```

**10** Press DIST.

```
Hold time: 00:30
CHNG            OK
```

**11** The default hold time is 00:30.
Press CHNG to change the default time
or
press OK to accept the default and go to step 14.

```
Hold time mmss:
RETRY           OK
```

**12** Enter the hold time and press OK.

```
Hold time: xx:xx
CHNG            OK
```

**13** Press OK.

```
Another step?
YES            QUIT
```

**14** Press YES to add another step
or
press ⟨🕾⟩ to end the session.

# Adding a Goto step

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

```
Log:
QUIT    RETRY    OK
```

**1**  Press ⌨ 9 8 3 .
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2**  Press OTHR.

```
Admin
GLIST    CCR    CC
```

**3**  Press CC.

```
CC Admin
AGENT    SKILL    OTHR
```

**4**  Press SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5**  Enter the number of the skillset you want to add a Goto step to and press OK.

```
Status: xxxxxx
CHNG            NEXT
```

**6**  If the skillset is enabled, press CHNG to disable it.
Press NEXT.

```
Skillset Admin
PARM    AGENT    ROUTE
```

**7**  Press ROUTE.

```
Route Table
DAY    NIGHT    QUIT
```

**8**  Press DAY or NIGHT.
In this example, Day is shown.

```
Day routing
SETUP           QUIT
```

**9**  Press  SETUP.

```
Step  x
DIST    GRTG    OTHR
```

**10**  Press OTHR.

```
Step  x
DISC    XFER    GOTO
```

**11**  Press GOTO.

```
Goto Step: x
CHNG            OK
```

**12**  Press CHNG until the step is displayed that you want the call to go to and press OK
or
press OK to accept the step that is shown.

```
Table complete
```

**13**  This display appears.
After you add a Goto step you cannot add more steps to the table.

**14**  Press ☎ to end the session.

# Adding a Transfer step

A transfer step can transfer calls to:

- an extension
- a mailbox
- an external number
- the Automated Attendant
- an operator
- a CCR Tree

| | |
|---|---|
| ```Log:```<br>```QUIT    RETRY    OK``` | **1** Press ⎣ ✆ ⎦ ⎣9⎦ ⎣8⎦ ⎣3⎦ .<br>Enter the Call Center Administrator mailbox number and password, and then press <u>OK</u>. |
| ```Admin```<br>```MBOX    AA    OTHR``` | **2** Press <u>OTHR</u>. |
| ```Admin```<br>```GLIST    CCR    CC``` | **3** Press <u>CC</u>. |
| ```CC Admin```<br>```AGENT  SKILL  OTHR``` | **4** Press <u>SKILL</u>. |
| ```Skillset:```<br>```RETRY    QUIT    OK``` | **5** Enter the number of the skillset you want to add a Greeting step to and press <u>OK</u>. |
| ```Status:xxxxxx```<br>```CHNG          NEXT``` | **6** If the skillset is enabled, press <u>CHNG</u> to disable it.<br>Press <u>NEXT</u>. |
| ```Skillset Admin```<br>```PARM  AGENT  ROUTE``` | **7** Press <u>ROUTE</u>. |
| ```Route Table```<br>```DAY    NIGHT    QUIT``` | **8** Press <u>DAY</u> or <u>NIGHT</u>.<br>In this example, Day is shown. |
| ```Day routing```<br>```SETUP          QUIT``` | **9** Press <u>SETUP</u>. |
| ```Step x```<br>```DIST    DIST    OTHR``` | **10** Press <u>OTHR</u>. |
| ```Step x```<br>```DISC    XFER    GOTO``` | **11** Press <u>XFER</u>.<br>Goto appears only if this is not the first step. |

```
Step x
EXTN    MBOX   OTHR
```

```
Step x
EXTERN     AA   OTHR
```

**12** Add the type of transfer step you want to the Routing Table.

To transfer to an extension:

- Press <u>EXTN</u>
- Enter the extension number and press <u>OK</u>

To transfer to a mailbox:

- Press <u>MBOX</u>
- Enter the mailbox number and press <u>OK</u>

To transfer to an external number:

- Press <u>OTHR</u>
- Press <u>EXTERN</u>
- Press <u>CHNG</u> to select a line or press <u>NEXT</u> to select a line pool as the outdial method
- Enter the line or line pool number and press <u>OK</u>
- Press <u>OK</u>
- Enter the telephone number you want to transfer the call to
- Press <u>OK</u>

To transfer to the Automated Attendant:

- Press <u>OTHR</u>
- Press <u>AA</u>
- Press <u>OK</u>

To transfer to the Operator:

- Press <u>OTHR</u>
- Press <u>OTHR</u>
- Press <u>OPER</u>
- Press <u>OK</u>

- To transfer to a CCR Tree:
- Press <u>OTHR</u>
- Press <u>OTHR</u>
- Press <u>OTHR</u>
- Press <u>CCR</u>
- Enter the number of the CCR Tree and press <u>OK</u>
- Press <u>OK</u>

```
Another step?
YES          QUIT
```

**13** Press <u>YES</u> to add another step
or
press 📞 to end the session.

# 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.

```
Log:
QUIT    RETRY    OK
```
**1** Press ⌨ 9 8 3 .
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA    OTHR
```
**2** Press OTHR.

```
Admin
GLIST    CCR    CC
```
**3** Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```
**4** Press SKILL.

```
Skillset:
RETRY    QUIT    OK
```
**5** Enter the number of the skillset you want to add a Disconnect step to and press OK.

```
Status:xxxxxx
CHNG          NEXT
```
**6** If the skillset is enabled, press CHNG to disable it.
Press NEXT.

```
Skillset Admin
PARM  AGENT  ROUTE
```
**7** Press ROUTE.

```
Route Table
DAY    NIGHT    QUIT
```
**8** Press DAY or NIGHT.
In this example, Day is shown.

```
Day routing
SETUP          QUIT
```
**9** Press SETUP.

```
Step x
DIST    GRTG    OTHR
```
**10** Press OTHR.

```
Step x
DISC    XFER
```
**11** Press DISC.

```
Disconnect
              OK
```
**12** Press OK.

```
Table complete
```
**13** Press ☎ to end the session.

# Example of a Day Routing Table

To set up the routing table steps 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<br>Forced<br>Transfer none enabled |
| 2 | Distribute for | 1:00 (one minute) |
| 3 | Greeting | Greeting 2, general company greeting<br>Not forced play<br>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<br>Not forced play<br>Intelligent Call Input Routing, Basic with operator default |
| 6 | Goto | Routing Table step 2 |

## To set up the Day Routing Table example

| | |
|---|---|
| ```Log:```<br>```QUIT    RETRY    OK``` | **1** Press ⬚ 9 8 3.<br>Enter the Call Center Administrator mailbox number and password, and then press OK. |
| ```Admin```<br>```MBOX    AA    OTHR``` | **2** Press OTHR. |
| ```Admin```<br>```GLIST    CCR    CC``` | **3** Press CC. |
| ```CC Admin```<br>```AGENT  SKILL  OTHR``` | **4** Press SKILL. |
| ```Skillset:```<br>```RETRY    QUIT    OK``` | **5** Enter the number of the skillset you want to set up and press OK. |
| ```Status:xxxxxx```<br>```CHNG          NEXT``` | **6** If the skillset is enabled, press CHNG to disable it.<br>Press NEXT. |
| ```Skillset Admin```<br>```PARM  AGENT  ROUTE``` | **7** Press ROUTE. |
| ```Route Table```<br>```DAY    NIGHT    QUIT``` | **8** Press DAY . |
| ```Day routing```<br>```SETUP          QUIT``` | **9** Press  SETUP. |

```
Step 1
DIST    GRTG   OTHR
```
**10** Press GRTG.

```
CC greeting:x
RETRY          OK
```
**11** Enter the number of the greeting you want to use and press OK.

```
CC greeting:x
RETRY   PLAY   OK
```
**12** Press OK.

```
Type: Norm
Force   XFER   OK
```
**13** Press Force and press OK.

```
Type: Norm
Force   XFER   OK
```
**14** Press OK.

```
Another step?
YES           QUIT
```
**15** Press YES to continue to build the table.

```
Step 2
DIST    GRTG   OTHR
```
**16** Press DIST.

```
Hold time: 00:30
CHNG           OK
```
**17** Press CHNG.

```
Hold time mmss:
RETRY          OK
```
**18** Enter 0100 and press OK.

```
Hold time: 01:00
CHNG           OK
```
**19** Press OK.

```
Another step?
YES           QUIT
```
**20** Press YES.

```
Step 3
DIST    GRTG   OTHR
```
**21** Press GRTG.

```
CC greeting:x
RETRY          OK
```
**22** Enter the number of the greeting you want to use and press OK.

```
CC greeting:x
RETRY   PLAY   OK
```
**23** Press OK.

```
Type:Norm
Force   XFER   OK
```
**24** Press XFER.

```
AA Key: 1
CHNG   DISABL  NEXT
```
**25** Press NEXT.

```
Oper Key: 0
CHNG   DISABL  NEXT
```
**26** Press NEXT.

```
Mbox Key: 9
CHNG   DISABL  NEXT
```
**27** Press NEXT.

```
CCR Key:2  Tr:1
CHNG   DISABL  OK
```
**28** Press OK.

```
Type:Norm Xfer
Force   XFER   OK
```
**29** Press OK.

```
Another step?
YES           QUIT
```
**30** Press YES.

| | |
|---|---|
| ` Step 4 `<br>` DIST    GRTG    OTHR ` | **31** Press <u>DIST</u>. |
| ` Hold time: 00:30 `<br>` CHNG            OK ` | **32** Press <u>OK</u>. |
| ` Another step? `<br>` YES          QUIT ` | **33** Press <u>YES</u>. |
| ` Step 5 `<br>` DIST   GRTG    OTHR ` | **34** Press <u>GRTG</u>. |
| ` CC greeting: `<br>` RETRY           OK ` | **35** Press 3 and press <u>OK</u>. |
| ` CC greeting: 3 `<br>` RETRY   PLAY    OK ` | **36** Press <u>OK</u>. |
| ` Type: Norm `<br>` Force    XFER    OK ` | **37** Press <u>XFER</u>. |
| ` AA Key: 1 `<br>` CHNG   DISABL  NEXT ` | **38** Press <u>DISABL</u>. |
| ` AA Key: disable `<br>` CHNG          NEXT ` | **39** Press <u>NEXT</u>. |
| ` Oper Key: 0 `<br>` CHNG   DISABL  NEXT ` | **40** Press <u>NEXT</u>. |
| ` Mbox Key: 9 `<br>` CHNG   DISABL  NEXT ` | **41** Press <u>DISABL</u>. |
| ` MBox Key: disable `<br>` CHNG          NEXT ` | **42** Press <u>NEXT</u>. |
| ` CCR Key: 2  Tr: 1 `<br>` CHNG   DISABL   OK ` | **43** Press <u>DISABL</u>. |
| ` CCR Key: disable `<br>` CHNG            OK ` | **44** Press <u>OK</u>. |
| ` Type: Norm Xfer `<br>` Force    XFER    OK ` | **45** Press <u>OK</u>. |
| ` Another step? `<br>` YES          QUIT ` | **46** Press <u>YES</u>. |
| ` Step 6 `<br>` DIST    GRTG    OTHR ` | **47** Press <u>OTHR</u>. |
| ` Step 6 `<br>` DISC    XFER    GOTO ` | **48** Press <u>GOTO</u>. |
| ` Goto Step: 1 `<br>` CHNG            OK ` | **49** Press <u>CHNG</u>. |
| ` Goto Step: 2 `<br>` CHNG            OK ` | **50** Press <u>OK</u>. |
| ` Table complete ` | **51** Press ☎ to end the session. |

# 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<br>Not forced play<br>Intelligent Call Input Routing, Basic |
| 2 | Disconnect | There are no parameters for the Disconnect option. |

## To set up the Night Routing Table example

```
Log:
QUIT    RETRY    OK
```
**1**  Press ⎆ 9 8 3 .
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA    OTHR
```
**2**  Press OTHR.

```
Admin
GLIST    CCR    CC
```
**3**  Press CC.

```
CC Admin
AGENT  SKILL  OTHR
```
**4**  Press SKILL.

```
Skillset:
RETRY   QUIT    OK
```
**5**  Enter the number of the skillset you want to set up and press OK.

```
Status: xxxxxx
CHNG        NEXT
```
**6**  If the skillset is enabled, press CHNG to disable it.
Press NEXT.

```
Skillset Admin
PARM  AGENT  ROUTE
```
**7**  Press ROUTE.

```
Route Table
DAY   NIGHT   QUIT
```
**8**  Press NIGHT.

```
Night routing
SETUP        QUIT
```
**9**  Press SETUP.

```
Step 1
DIST   GRTG   OTHR
```
**10**  Press GRTG.

```
CC greeting: x
RETRY         OK
```
**11**  Press 6 and press OK.

```
CC greeting: x
RETRY   PLAY   OK
```
**12**  Press OK.

```
Type: Norm
Force    XFER      OK
```
**13** Press XFER.

```
AA Key: 1
CHNG   DISABL   NEXT
```
**14** Press NEXT.

```
Oper Key: 0
CHNG   DISABL   NEXT
```
**15** Press NEXT.

```
Mbox Key: 9
CHNG   DISABL   NEXT
```
**16** Press NEXT.

```
CCR Key: 2  Tr: 1
CHNG    DISABL      OK
```
**17** Press OK.

```
Type: Norm Xfer
Force     XFER      OK
```
**18** Press OK.

```
Another step?
YES              QUIT
```
**19** Press YES.

```
Step 2
DIST    GRTG    OTHR
```
**20** Press OTHR.

```
Step 2
DISC    XFER    GOTO
```
**21** Press DISC.

```
Disconnect
                  OK
```
**22** Press OK.

```
Another step?
YES              QUIT
```
**23** Press 🕿 to end the session

# Changing a routing table

→ **Note:** You can add steps to a routing table only when you set it up. After you set up the table, you cannot add or delete steps. You can modify steps.

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 40.

| To | Follow the procedure |
|---|---|
| Review steps | "Reviewing Routing Table steps" on page 120 |
| Modify steps | "Modifying Routing Table steps" on page 121 |
| Erasing a routing table | "Erasing a Routing Table" on page 122 |

## Reviewing Routing Table steps

```
Log:
QUIT    RETRY    OK
```
**1** Press ⌂ ⑨ ⑧ ③ .
Enter the Call Center Administrator mailbox number and password, and then press OK.

```
Admin
MBOX    AA    OTHR
```
**2** Press OTHR.

```
Admin
GLIST   CCR    CC
```
**3** Press CC.

```
CC Admin
AGENT   SKILL  OTHR
```
**4** Press SKILL.

```
Skillset:
RETRY   QUIT    OK
```
**5** Enter the number of the skillset you want to review and press OK.

```
Status:xxxxxx
CHNG           NEXT
```
**6** Press NEXT.

```
Skillset Admin
PARM  AGENT  ROUTE
```
**7** Press ROUTE.

```
Route Table
DAY    NIGHT   QUIT
```
**8** Press DAY or NIGHT.
In this example, Day is shown.

```
Day routing
VIEW   ERASE   QUIT
```
**9** Press VIEW.

```
1:xxxxx
CHNG           NEXT
```
**10** Press NEXT to view each remaining step.

```
End table
```
**11** This display appears when you reach the last step.

```
Route Table
DAY    NIGHT   QUIT
```
**12** Press ☎ to end the session.

## Modifying Routing Table steps

```
Log:
QUIT    RETRY    OK
```

**1** Press ⌂ 9 8 3.
Enter the Call Center Administrator mailbox number and
password, and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST   CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT   SKILL  OTHR
```

**4** Press SKILL.

```
Skillset:
RETRY   QUIT    OK
```

**5** Enter the number of the skillset you want to modify a step for and
press OK.

```
Status: xxxxxx
CHNG          NEXT
```

**6** If the skillset is enabled, press CHNG to disable it.
Press NEXT.

```
Skillset Admin
PARM   AGENT  ROUTE
```

**7** Press ROUTE.

```
Route Table
DAY    NIGHT   QUIT
```

**8** Press DAY or NIGHT.
In this example, Day is shown.

```
Day routing:
VIEW   ERASE   QUIT
```

**9** Press VIEW.

```
1: xxxx
CHNG          NEXT
```

**10** The display shows the first step in the routing table.
Press CHNG if this is the step you want to change
or
press NEXT until you find the step you want to change and then
press CHNG.

```
xxxxxxx:
RETRY           OK
```

**11** Change the parameters for the step and press OK.

```
xxxxxxx:
CHNG          NEXT
```

**12** The display shows the new parameters for the step.
Press NEXT to view or change the next step
or
press ☎ to end the session.

## Erasing a Routing Table

```
Log:
QUIT    RETRY    OK
```

**1** Press ⌨ 9 8 3 .
Enter the Call Center Administrator mailbox number and
password, and then press OK.

```
Admin
MBOX    AA    OTHR
```

**2** Press OTHR.

```
Admin
GLIST   CCR    CC
```

**3** Press CC.

```
CC Admin
AGENT   SKILL  OTHR
```

**4** Press SKILL.

```
Skillset:
RETRY    QUIT    OK
```

**5** Enter the number of the skillset you want to delete a routing table
from and press OK.

```
Status: xxxxxx
CHNG           NEXT
```

**6** If the skillset is enabled, press CHNG to disable it.
Press NEXT.

```
Skillset Admin
PARM   AGENT  ROUTE
```

**7** Press ROUTE.

```
Route Table
DAY    NIGHT   QUIT
```

**8** Press DAY or NIGHT.
In this example, Day is shown.

```
Day routing
VIEW   ERASE   QUIT
```

**9** Press ERASE.

```
Erase table?
YES             QUIT
```

**10** Press YES.

```
Table erased
```

**11** This display appears briefly.

```
Day routing
SETUP           QUIT
```

**12** Press SETUP if you want to create a new routing table
or
press ☎ to end the session.

# Setting the Service Modes for skillsets

You must set the Service Mode the skillset uses so that calls are answered correctly. You must set the Service Mode using ⌨ 9 8 2 before 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 Automatic Service Mode to the skillset. |
| **Day** | The skillset uses the Manual Service mode and the Day Routing Table.<br>You must configure the Day Routing Table before you can assign the Manual Service Mode and the Day Routing Table. |
| **Night** | The skillset uses the Manual Service mode and the Night Routing Table.<br>You must configure the Night Routing Table before you can assign the Manual Service Mode and the Night Routing Table. |
| **24 Hour** | The skillset uses the Day Routing Table only.<br>You must configure the Day Routing Table for 24 hour operation to use this Service Mode. |
| **Uninit** | The skillset is not configured.<br>You must configure the skillset before you can assign the 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:``` <br> ```RETRY          OK``` | **1** | Press ⌨ 9 8 2.<br>Enter the default Operator password 6 7 3 7 2 8 6 7, (Operator) and press OK<br>or<br>if you changed the default Operator password, enter the new password and press OK. |
| ```Choose option``` <br> ```OPER        MODE``` | **2** | Press MODE. |
| ```Call Center``` | **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 Auto or
Night
or
press VIEW if you want to view the details for the Service Mode
or
press NEXT.

```
Exit
```

**6** The session ends when the Service Modes for all skillsets has been
displayed.

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

# Chapter 10
# Monitoring call activity

There are two ways that you and supervisors can monitor call activity at your call center.

You can monitor call activity by viewing memory buttons that you program with
[✆] [9] [0] [9] (Display Waiting Calls, Skillset Status) and [✆] [9] [0] [4] (Log on/Log off,
Monitor Skillsets). For more information on this method of monitoring, refer to "Primary and
Secondary alert times" on page 20.

You can also use [✆] [9] [0] [9] to monitor the real-time status of call activity. As your call center
receives calls, you can use [✆] [9] [0] [9] to view for each skillset:

• the display waiting calls status (enabled or disabled)
• the number of agents logged on
• the number of calls waiting
• the longest time a call has been waiting

> **Note:** If you want to monitor agents, ask them not to:
>    • use Call Forward on Busy
>    • use Do Not Disturb
>    • make conference calls while they are logged onto Call Center
>
> You cannot monitor agents who are using any of these features.

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

> **Note:** If you have the Call Center Reporting option enabled, you can monitor and record
> call activity from a computer that is running Call Center Reporting. You need a software
> authorization code to use Call Center Reporting. Contact your vendor if you are
> interested in purchasing or trialing Call Center Reporting.

# Using Display Waiting Calls to monitor call activity

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

## To monitor call activity in a skillset

**1**   Press ⌧ 9 0 9 .

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

**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.
To monitor another skillset, press GOTO and enter the skillset number.

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

**3**   The display shows the number of agents logged on to skillset 1. Press NEXT.

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

**4**   The display shows the calls that are currently waiting to be answered by agents in skillset 1.
Press NEXT.

```
1:wait 4:00
GOTO   SKILL   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 GOTO to monitor another skillset and enter the skillset number
or
press NEXT to monitor skillset 2.

## To monitor calls using a one or two line telephone

You can monitor calls using a one line telephone. While you are using ⌧ 9 0 9 , on a one line or a two line telephone you can:

- press 1 for GOTO to enter the number of the skillset you want to monitor
- press 2 for SKILL to monitor the next enabled skillset
- press 3 or 6 for NEXT
- press 4 for PREV to go to previous menu
- press # to go to the next menu
- press * to cancel the session

# Chapter 11
# Tips for operating Call Center

This chapter has tips on improving 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), in your greeting 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 a greeting that transfers callers to a skillset mailbox you include in the greeting: "*To leave a message in the mailbox press* 9 " (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 mention in the greeting to 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. Otherwise, there will be no channels available for 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 33.

- **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 more 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 you use for 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 12
# 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 131 |
| the Call Center Administrator password | page 26 |
| a skillset mailbox password | page 52 |
| an agent password | page 102 |

### 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

1  Press ◻ 9 8 5.

```
Set xxx
           NEXT
```

2  Press 7.
In this example, xxx represents the CDN for skillset 1.

```
Pswd
RETRY        OK
```

3  Enter 7 3 7 3 8 6 7 3 7 7 7 9 3
(Resetoperpswd) and press OK.

```
Reset pswd?
YES          NO
```

4  Press YES.

```
Exit
```

5  The session ends.
The Operator password is now reset to 6 7 3 7 2 8 6 7
(Operator.)

# Agent problems

## Agent log on problems

If an agent cannot log on at their telephone:

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

## Features that logged on agents must not use

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

### Call Park

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

- if the agent wants to send the call to a specific agent, the agent can enter the Transfer Feature Code (⌨ 7 0) and enter the agent's 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

### Call Forward

Agents must not use Call Forward (⌨ 9 8 4 or ⌨ 4) to forward their calls.

### Call Pickup

Agents must not use Call Pickup to retrieve a call that is ringing on another agent's telephone. Instead:

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

    or

- enter the Not Ready Feature Code (⌨ 9 0 8) on the other agent's telephone

### Answer DN

Do not use the Answer DN feature on any set that an agent or a supervisor uses.

### Restrictions for using Do Not Disturb

Instead of using Do Not Disturb, agents must use the Not Ready Feature Code (⌨ 9 0 8).

### Restrictions for using Call Forward No Answer

When an agent's telephone is on Call Forward No Answer to the voicemail extension, the number of rings for Call Forward No Answer must be greater than the number of rings for Transfer Callback Timeout.

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

### Restrictions for using Call Forward on Busy

If you want to monitor agents, ask them not to use Call Forward on Busy. You cannot monitor agents who have their telephone set to Call Forward on Busy.

When an agent telephone is programmed with Call Forward on Busy to the voicemail extension, the Call Center Administrator must program the call center line for that agent as Appear Only, not Ring Only or Appear and Ring.

When an agent telephone has a mailbox associated with it, the Call Center lines assigned to the agent telephone must be set up as Appear Only, not Ring Only or Appear and Ring.

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

### 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 telephone, through Norstar administration:

- turn the Do Not Disturb or Busy feature on for the agent's set
- set the Call Forward on Busy feature for your set to the voicemail DN.
  Make sure the Call Center lines on the agent's set are set to Appear Only, not Ringing.

For information on programming any of these settings, refer to the *Norstar System Coordinator Guide*.

### Conference calls

Ask agents not to make conference calls while they are logged onto Call Center.

# Skillset problems

## 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 46 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.

# Chapter 13
# Call Center Programming Record

| For this programming task | see | on page |
|---|---|---|
| Record the Feature Codes used by Call Center | Feature Codes | 136 |
| Record the line information for lines answered by Call Center | Line answering | 142 |
| Record the Operator and Business Status settings | Operator/Business Status | 136 |
| Record the number of reserved channels and the Primary and Secondary Alert times | General Call Center parameters | 136 |
| Record agent ID, agent name, Priority, supervisor status and skillset for each agent | Call Center agents | 138 |
| Record Control DN, skillset name, MWI ext, Method, Break Time and Delay Answer time limit | Call Center skillsets | 137 |
| Record agents assigned to the skillsets | Skillset assignments | 139 |
| Record the skillset mailbox name, skillset mailbox number, MWI extension and skillset mailbox password | Skillset mailboxes | 140 |
| Record the type of step and step parameters for Day and Night Routing Tables | Routing Tables | 141 |
| Record Line Answering details | Line answering | 142 |

➡ **Note:** Make copies of these pages as required.

# Feature Codes

| Feature code name | Dialpad buttons | Custom Feature Code |
|---|---|---|
| Display Waiting Calls | ✆ 9 0 9 | ✆ 9 _____ _____ |
| Open Mailbox | ✆ 9 8 1 | ✆ 9 _____ _____ |
| Log on/Log off | ✆ 9 0 4 | ✆ 9 _____ _____ |
| Not Ready | ✆ 9 0 8 | ✆ 9 _____ _____ |
| Return to skillset on No Answer | | ✆ 9 _____ _____ |
| Voicemail DN | ✆ 9 8 5 | ✆ 9 _____ _____ |
| Operator status | ✆ 9 8 2 | ✆ 9 _____ _____ |

# General Call Center parameters

| | |
|---|---|
| Number of Reserved channels | |
| Primary alert time limit in mm:ss | |
| Secondary alert time limit in mm:ss | |

# Operator/Business Status

| Password **OPERATOR** (**67372867**) | | | |
|---|---|---|---|
| Receptionist or Operator available* | Y    N | | |
| Business open* | Y    N | | |
| Answer trunks | Y    N | | |
| Receptionist or Operator extension | | | |
| Call Center Service* | Skillset Number ___ | Auto | |
| | | Manual | Day    Night |
| | 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 | |
| Attendant extension | | | |
| Prompt language | | | |
| Overflow | | 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 | |
| Attendant extension | | | |
| Prompt language | | | |
| Overflow | | 00:00 | |

# Call Center agents

| Agent ID | Agent name | Supervisor status (y or n) | Name and # of skillsets agent is assigned to | Auto answer (y or n) | Missed call option (Busy or Logout) | Priority |
|---|---|---|---|---|---|---|
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# Skillset assignments

| Skillset name and # | Agent ID and name | Priority |
|---|---|---|
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# Skillset mailboxes

| Skillset # | Mailbox name | Mailbox number (Control DN) | MWI extension | Mailbox password |
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# Routing Tables

**Skillset #** _____          **Day or Night** _____

| Step # | Type of step:<br>**Greeting, Distribution,<br>Transfer, Disconnect, Go To** | Step parameters |
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# Line answering

| Line # | Skillset # | # of rings (0 to 12) for Caller ID minimum 2 rings |
|--------|-----------|-----------------------------------------------------|
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|        |           |                                                     |
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# 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 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 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, no calls are routed to them for the 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 (CFAC)**

This feature forwards all calls from a telephone to another extension number. For example, all calls from a telephone can be forwarded to the CDN of a skillset.

**Call Forward No Answer (CFNA)**

This feature forwards unanswered calls from a telephone 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 (CFB)**

This feature forwards all calls from a telephone to another extension if any of the lines assigned to the telephone are busy.

**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 and presents callers 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 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 skillset 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.

**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, Basic**

Intelligent Caller Input Routing, Basic lets callers direct their calls to an Operator, Automated Attendant, skillset mailbox, CCR Tree.

**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.

**Longest idle**

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 LCD indicators on a telephone 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 telephone 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 telephone as the designated MWI extension. The Message Waiting Indication extension is an optional telephone number that indicates when a skillset mailbox has messages waiting. The MWI extension that you assign shows *Message for you* on the telephone display when there are new messages in the skillset mailbox.

**Method of Call Distribution**

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 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. An agent can have a priority from 1 to 20. 1 is the highest priority.You can assign this priority to your most experienced agents.

**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) is a 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 collect and distribute 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.

**Subscriber**

A subscriber is a mailbox owner.

**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