Call Distributor Version 2

Call Distributor allows you to create a fully customizable virtual call center. It provides your company with an organized method of distributing calls to agents on *any* phone, regardless of their location or particular phone setup. Call Distributor Version 2 introduces several significant enhancements. New Agent Modes allow you to monitor the amount of time your agents spend on calls, waiting to take calls, on breaks, and more. The addition of Application Transfers enables agents to transfer callers to another phone number or Ifbyphone application via the Agent Panel. New reporting makes analyzing and managing your Call Distributor easier than ever.

This Jumpstart serves as a guide for configuring a Version 2 Call Distributor. Take a look at these related Jumpstarts for additional information:

- **Call Distributor Version 2 – Manager Control Panel Jumpstart**
- **Call Distributor Version 2 – Agent Control Panel Jumpstart**

This Jumpstart will guide you through the configuration of each section. Follow these steps to begin:

1. Login to www.ifbyphone.com with your user ID and password.
2. Select *Call Distributor* from the *Advanced Services* tab.
3. On the *Call Distributors* page, select *"Create a new Call Distributor v2."*

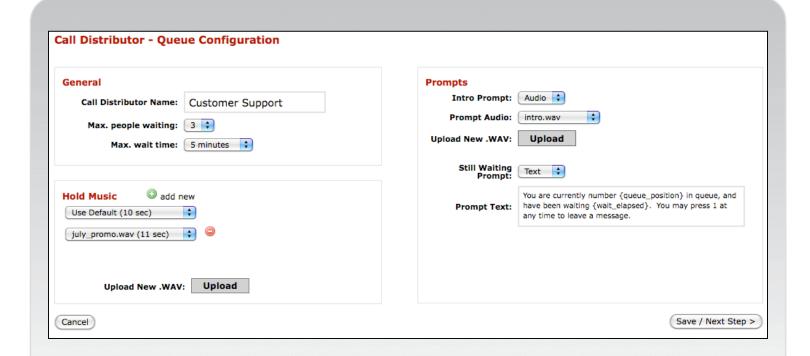The Call Distributor setup is segmented into three parts:

- **Queue Configuration**
- **List Configuration**
- **Agents Configuration**

Call Distributor – Queue Configuration

A **queue** is a hold line where a caller is placed when agents are actively logged into the system, but no agents are available to take calls. The first person in the queue is transferred to the next available agent.

Note: A caller will only enter the queue if there are no available (Open) agents when they enter your Call Distributor. If there are Open agents, callers will bypass the queue and begin transferring to an agent immediately.

Call Distributor - Queue Configuration

General

Call Distributor Name: Customer Support

Max. people waiting: 3

Max. wait time: 5 minutes

Hold Music ⊕ add new

Use Default (10 sec)

july_promo.wav (11 sec) ⊖

Upload New .WAV: **Upload**

Prompts

Intro Prompt: Audio

Prompt Audio: intro.wav

Upload New .WAV: **Upload**

Still Waiting Prompt: Text

Prompt Text: You are currently number {queue_position} in queue, and have been waiting {wait_elapsed}. You may press 1 at any time to leave a message.

Cancel   Save / Next Step >

Step 1 – Configure the General Settings

- **Call Distributor Name:** Give your Call Distributor a descriptive name.
- **Max People Waiting:** Select the maximum number of callers allowed to wait in queue at one time. To allow more callers to wait in queue at one time, add more Queue Slots by selecting *Purchase Add-Ons* from the *My Account* tab. Your account includes 5 Queue Slots by default.
- **Max Wait Time:** Select the maximum length of time a caller can wait in queue to be transferred to an available agent. The maximum wait time can range from 20 seconds to 60 minutes.

  If *Max People Waiting* or *Max Wait Time* is exceeded, the applicable caller is routed to a pre-determined application that you will configure on the *Call Distributor – List Configuration* page. A caller may also press one on the phone keypad at anytime to exit the queue and route to the specified application.

Step 2 – Upload and Configure Hold Music

- Click the *Upload* button to upload a wav file to be played while callers are waiting in the queue. Uploaded wav files are available for selection from the drop-down menus.
- Click *Add New* to add a new another audio clip in succession. The audio files will be played in the order they are listed. After the first audio file is played, the system will attempt to transfer the caller to an available agent. If no agent is

available, the caller will hear the *Still Waiting Prompt* – see below for instructions on setting this up – and then the next audio file will be played. After all your audio files are played, the system returns to the first audio file.
- To remove an audio file slot, select the red delete button.

Note: The system will <u>not</u> attempt to transfer the call while a hold music audio file is being played, so we recommend limiting your hold music files to 15 seconds or less.

Step 3 – Configure the <u>Prompts</u>

- **Intro Prompt:** This is what the caller hears when they first reach the Call Distributor and are placed in queue. This prompt is only played once at the beginning of the caller's wait. Callers will not hear this prompt if there are available agents to take calls. The *Intro Prompt* can be played to the caller via Text-to-Speech or via an uploaded pre-recorded wav file.
- **Still Waiting Prompt:** This message is played directly after the *Intro Prompt*, and between the hold music audio files while the caller remains in the queue. You can choose to type text in the field below to be read via Text-to-Speech, or upload a wav file.
- **Prompt Text:** If you choose to have the system read Text-to-Speech, type the message in this field. There are a number of variables that can relay information such as how long a caller has waited in the queue and what number they are in queue. For the various parameter options, see the list below.
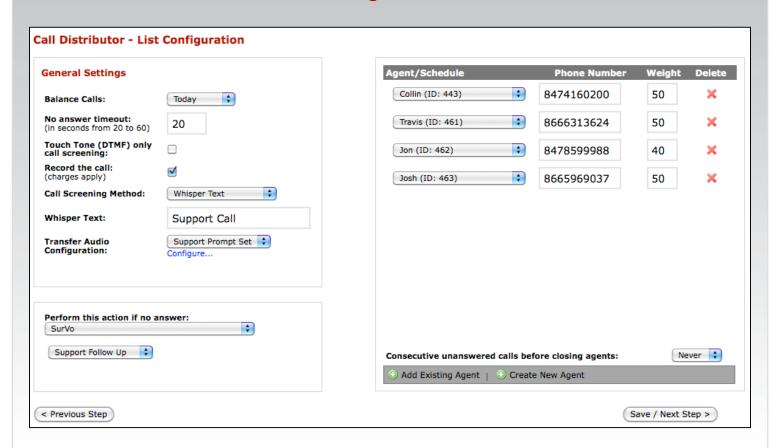
Parameters for Text-to-Speech Prompts:

- **{queue_name}** - The textual identifier for this Call Distributor queue
  - Example: Customer Support
- **{holdmusic}** - A comma-separated list of relative paths within the Ifbyphone system to the defined hold music audio files
  - Example: user_recordings/0/917/holdmusic/onaboat.wav,audio/background.wav,user_recordings/0/917/holdmusic/rickroll.wav
- **{size_limit}** - The maximum number of callers that can be in a queue at one time
  - Example: 15
- **{wait_limit}** – The *Max Wait Time* for the queue supporting hours, minutes, and seconds
  - Example: 10 minutes
- **{queue_position}** - The numeric identifier of the caller's place in the queue line
  - Example: 4
- **{wait_elapsed}** – The duration a caller has waited in queue supporting hours, minutes, and seconds
  - Example: 3 minutes 26 seconds
- **{wait_remaining}** – The duration a caller has waited in queue subtracted from the *Max Wait Time* supporting hours, minutes, and seconds
  - Example: 5 minutes 30 seconds

For example, your *Still Waiting Prompt* could tell a caller, "We will be with you shortly. You are number {queue_position) in line and your maximum wait time is {wait_limit}. Thank you for your patience."

Call Distributor – List Configuration

Step 1 – Configure the General Settings

- **Balance Calls:** Choose the time frame on which to balance the incoming calls between your agents. Select *Today, This Week, This Month, Hours,* or *Days*. The ratio of calls routed to an agent is dependent on the weight assigned to each agent. For example, let's say you choose *This Week* and agents are weighted equally. If one agent is absent on Tuesday, when they return on Wednesday that agent will be offered more calls than other agents until the call ratios have been balanced.

- **No answer timeout:** Choose the amount of time (in seconds) that the system will call an agent's number before determining there is "no answer," and moving on to the next available agent. The *No Answer Timeout* can range from 20 to 60 seconds.

- **Touch Tone (DTMF) only call screening:** With the majority of Call Distributor configurations, agents are prompted to accept the call by saying "yes" or pressing 1 on their keypad. Agents can also deny calls by saying "no" or pressing 2, at which point the caller is transferred to another available agent. Choosing *DTMF Only* will disable voice recognition and require agents to use

their keypad to accept or deny a call. This is a recommended feature if your agents will be working in noisy environments, as it's possible that background noise can be interpreted as an invalid response if this option is not enabled.

- **Record the call:** You can record all inbound calls to your Call Distributor by checking the box next to *Record Calls*. If selected, recorded calls will be billed at 1.5 times the applicable usage rate. Recorded calls are accessible via *Audio File Maintenance* (found under the *Utilities* tab) or via the *Call Detail Report*. Note that outbound calls made via the Agent Panel are not recorded.
- **Call Screening Method:** Choose the method for relaying whisper message information to the agent answering the phone. A whisper message is a means of offering some information about the call to an agent before being connected to the caller such as "support call" or "call from radio ad."
  - o **Record Caller's Name:** Prompt the caller for their name and whisper it to the agent answering the phone prior to prompting the agent to accept the call.
  - o **Whisper Text:** Text typed into this field will be read to the agent answering the phone as text-to-speech before they are asked to accept or decline the call.
  - o **Whisper Audio:** Upload an audio file that will be played to the agent answering the phone before they are asked to accept or decline the call.
- **Transfer Audio Configuration:** This allows you to fully customize and/or remove the audio prompts played to callers and agents while transferring a call. Click *Create New* and the Advanced Audio Prompt Configuration pop-up window opens.
  - o **Audio Prompt Set Name:** Give your custom prompt set a name.
  - o **Upload:** Click the *Upload* button to browse for a wav file on your hard drive to use in place of a default prompt. Select an uploaded audio file from the drop-down menu to the right of a prompt to replace the default.
  - o **Removing a default prompt:** Select *Blank Audio* from the drop-down menu to the right of a prompt to remove the default prompt.
  - o **Sample Prompt Text:** Click *Sample Prompt Text* to view the text of a default prompt.
  - o **Prompts played to the <u>caller</u> under appropriate circumstances:**
    - ▪ Record Name Intro
    - ▪ Post-Recording Name
    - ▪ Whisper Phrase/Audio Intro
    - ▪ Failed Call Announcement
    - ▪ Finished Announcement
  - o **Prompts played to the <u>agent</u> under appropriate circumstances:**
    - ▪ Played Before Recorded Name Only
    - ▪ Played To Prompt For Acceptance Only
    - ▪ Played If Accepts The Call, It's Auto-Accepted, or After Whisper Phrase/Audio
    - ▪ Played If Agent Denies The Call
    - ▪ Played When Caller Hangs Up Early
    - ▪ Played When Caller Opts Out Of Waiting

o **Prompt played to <u>both parties</u> when recording is enabled:**
   ▪ Recorded Call Warning (Two Party)

Step 2 – Add/Create and Configure Agents:

- **Create <u>New</u> Agent:** Click *Create New Agent* to create a <u>new</u> Call Distributor Agent. Enter a name for your Agent and the Agent PIN in the pop-up window and click the save button. The Agent PIN is used to access the Agent Panel. Your new Agent appears in the Agent/Schedule section.

  Create New Agent   close

  Agent Name:
  Collin

  Agent PIN: (4-digits)
  1864

  (Cancel)   (Save)

  - o **Phone Number:** Enter your Agent's phone number in the Phone Number field.
  - o **Weight:** Specify a weight for your agent to determine how calls are distributed among agents. Weight is a ratio and does not need to add to 100. For example, if the weight is set to 20 for Agent A and 40 for Agent B, Agent B will be offered twice the number of calls offered to Agent A. Configure the time frame on which to distribute calls based on these weights under the *General Settings* section.
- **Add <u>Existing</u> Agent:** Click *Add Existing Agent* to add a previously created agent to this Call Distributor and select the desired Agent from the drop-down menu in the Agent section. Enter the Agent's phone number and weight as described above.
- **Consecutive Unanswered Calls Before Closing Agents:** From the drop-down menu, select how many calls in a row an agent may miss before their status is automatically changed to *Closed*. You may also select to never close an agent due to missed calls. By automatically closing an agent that has mistakenly left their status set to *Open*, you can reduce a caller's wait time because you avoid transferring them to an agent that is not available to accept the call. An agent's status that is set to *Closed* due to missed calls will remain closed until adjusted via the Agent Panel or Manager Panel. If your agents will not be using the Agent Panel, it is recommended that you do not close agents based on unanswered calls.

Note: To view or edit an agent's PIN, select *Schedules* from the *Utilities* tab and click the *Edit* button associated with the agent.
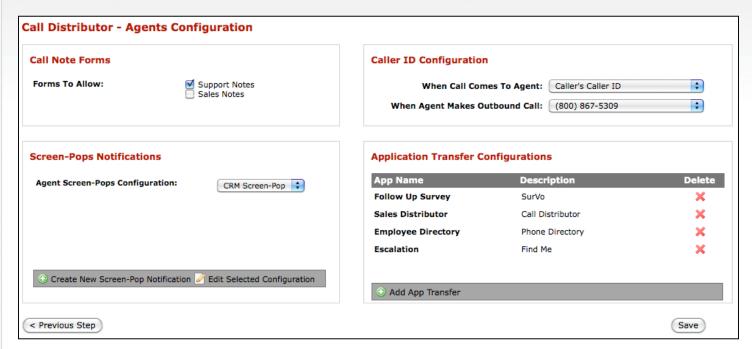
Step 3 – Select Routing for Unanswered Callers:

- **Perform this action if no answer:** From the drop-down menu, select the application to which callers will be routed if they exceed the *Max Wait Time,* exceed the *Max People Waiting* in queue, or opt out of waiting in queue by pressing one. Select one of the following:
  - o **Tell User No One is Available and Disconnect:** Play the *Finished Call* prompt to the caller and end the call. This prompt can be customized via *Transfer Audio Configuration.*

- o **Automatically Accept on First Answered Call:** Automatically connect the caller when an agent answers a call without prompting the agent to accept. This is useful if an agent's phone number is answered by an IVR before the agent picks up or if you simply don't want your agents to have to accept the call. If the caller exceeds the *Max Wait Time, Max People Waiting,* or opts out of waiting by pressing "1" on their keypad, they will hear the *Finished Call* prompt (customizable via *Transfer Audio Configuration*). Note: If an agent's voicemail kicks in before the caller is answered or reaches the *No Answer Timeout,* the caller will be connected to the agent's voicemail.
- o **Virtual Receptionist:** Transfer the caller to a Virtual Receptionist.
- o **Schedule Router:** Transfer the caller to a Schedule Router. This enables you to base your *No Answer Action* on a schedule.
- o **Find Me:** Transfer the caller to a Find Me list.
- o **Call Distributor:** Transfer the caller to another Call Distributor.
- o **Locator:** Transfer the caller to a Store Locator.
- o **SurVo:** Transfer the caller to a SurVo (IVR).
- o **Voice Mail Greeting:** Transfer a caller to a Voice Mail.

Call Distributor – Agent Configuration

Call Distributor - Agents Configuration

Call Note Forms

Forms To Allow:
- ☑ Support Notes
- ☐ Sales Notes

Caller ID Configuration

When Call Comes To Agent: [Caller's Caller ID ▼]

When Agent Makes Outbound Call: [(800) 867-5309 ▼]

Screen-Pops Notifications

Agent Screen-Pops Configuration: [CRM Screen-Pop ▼]

⊕ Create New Screen-Pop Notification ✎ Edit Selected Configuration

Application Transfer Configurations

App Name	Description	Delete
Follow Up Survey	SurVo	✖
Sales Distributor	Call Distributor	✖
Employee Directory	Phone Directory	✖
Escalation	Find Me	✖

⊕ Add App Transfer

[< Previous Step]   [Save]

Step 1 – Select Optional <u>Call Note Forms</u> for Agents:

Call Note Forms are customizable forms that can be accessed and submitted via the Call Distributor Agent Panel. For example, you can enable your agents to provide

summary notes on calls or rate leads based on a scale that you determine. *Call Note Forms* can be created by selecting *Distributor Forms* from the *Developer Tools* tab.

- **Forms to Allow:** Select the check box next to a Call Note Form to make the form accessible to agents for this Call Distributor via the Agent Panel. **Note:** If you have yet to create any Call Note Forms, you will not have any available for selection here.

Step 2 – Select and Configure Optional <u>Screen-Pops Notifications</u>:

A Screen-Pops Notification is information that will be displayed to the agent in the notification section of the Agent Panel when a call is transferred to an agent. This can help agents to be more prepared when they answer a call.

- **Create New Screen-Pop Notification:** Select this link to configure a new Screen Pop Notification. A pop-up window opens allowing you to configure the following:
  - o **Agent Screen-Pops Configuration Name:** Name your configuration.
  - o **Reverse Directory Lookup (charges apply):** Check this box to have the Ifbyphone system lookup the caller's phone number to find name and address information. A fee applies for performing a reverse lookup, even if no information is available for the incoming phone number.
  - o **SalesForce.com Lookup:** Check this box; then input your SalesForce login and password to have the Ifbyphone system pull the contact information for the caller's phone number from your SalesForce.com account. **Note:** Your SalesForce.com account must include API access to utilize this feature.
  - o **Do Your Own Lookup Mashup:** Using custom code in conjunction with your customer relationship manager system, you can configure the Ifbyphone system to lookup information on the caller based on their phone number.
- **Edit Selected Configuration:** Select this link to view or change the existing *Screen Pops Configuration* selected in the drop-down menu.

Select the desired *Agent Screen-Pops Configuration* from the drop-down menu.

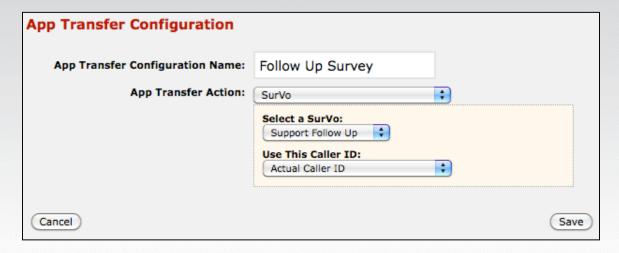**Step 3 – Determine the <u>Caller ID Configuration</u>:**

- **When Call Comes to Agent:** From the drop-down menu, select the phone number to be displayed on an agent's caller ID and Agent Panel when a call is transferred to them. Choose to display the caller's actual phone number, or select any of your Ifbyphone numbers or Registered Numbers (found under the *My Account* tab) to be displayed to the agent. The advantage of showing a static phone number is that agents will know that the call is coming from the Call Distributor based on the phone number displayed on their caller ID.
- **When Agent Makes Outbound Call:** From the drop-down menu, select the phone number to be displayed to the receiving party when an agent makes an

outbound call via the Agent Panel. This enables you to display your company's main phone number to customers instead of the agent's personal number. Select from any Ifbyphone numbers or Registered Numbers (configurable under the *My Account* tab).

Step 4 – Select Optional <u>Application Transfer Configurations</u>:

Application Transfers enable agents to transfer callers to another phone number or Ifbyphone application via the Call Distributor Agent Panel. Note: When a caller is transferred, billing continues until the caller is ultimately disconnected.

App Transfer Configuration

App Transfer Configuration Name: Follow Up Survey

App Transfer Action: SurVo

Select a SurVo:
Support Follow Up

Use This Caller ID:
Actual Caller ID

Cancel   Save

- **Add App Transfer:** Click *Add App Transfer* and a pop-up window opens allowing you to configure a new Application Transfer.
    - o **App Transfer Configuration Name:** Give your Application Transfer a descriptive name. This is how your agents will identify it on the Agent Panel.
    - o **App Transfer Action:** From the drop-down menu, select the Ifbyphone application or phone number to which an agent can transfer a caller. Choose from the following:
        - ▪ Call Distributor
        - ▪ Find Me
        - ▪ Store Locator
        - ▪ Phone Directory
        - ▪ Play Audio
        - ▪ Read Text
        - ▪ Schedule Router
        - ▪ SurVo (IVR)
        - ▪ Transfer Call
        - ▪ Transfer Call w/Whisper Message
        - ▪ Virtual Receptionist
        - ▪ Voice Mail Greeting