

MOMENTUM

CONTACT CENTER USER GUIDE

TABLE OF CONTENTS

- To Set Up Queue Profile 4
- To Configure Queue/Agent Settings 5
- Global Contact Center Settings 8
- Contact Center Feature Glossary 10

Note: This manual is designed for all features and all privilege levels. If certain features are missing, check your privilege level. Some options may not be available depending on the level of contact center you have purchased

- **Basic Contact Center Agents may only be assigned to Basic queues**
- **Standard Contact Center Agents may be assigned to Basic or Standard queues**
- **Premium Call Center Agents may be assigned to any Contact Center queue**

- Standard/Premium**
- Premium Only**

TO SET UP QUEUE PROFILE:

1. Login to online account
2. Click Contact Center
3. Click Edit following appropriate queue
4. Check to Activate / Uncheck to Deactivate queue
5. Enter ▪ Name and ▪ Calling Line ID Name
 - Select ▪ Department ▪ Language and ▪ Time Zone
6. Select Group Policy: ▪ Circular ▪ Regular ▪ Simultaneous ▪ Uniform or ▪ Weighted Call Distribution
7. Select appropriate Bandwidth and QoS Settings
8. Enter maximum number of calls allowed for overflow for Queue Length
9. Check to Enable / Uncheck to Disable:
 - Play ringing when offering call to agent
 - Allow callers on hold to dial a set number (0-9, *, #) to escape queue
 - Reset caller statistics / preserved wait time upon entry to a new queue
10. Check to Enable / Uncheck to Disable:
 - Agents to join Contact Centers
 - Call Waiting on agents
11. Check to Enable / Uncheck to Disable:
 - Agents to receive calls in wrap-up state
 - Maximum ACD wrap-up timer after a set minutes and seconds
 - Automatically set agent ACD state after call to ▪ Available ▪ Unavailable ▪ Wrap-Up
12. Automatically answer calls after waiting a specified number of seconds
13. Click Save

NOTE: There is an option to Reset Contact Center Queue Password located at the bottom of the queue profile page. To Reset: Click link > Enter password > Re-enter Password > Click Save.

TO CONFIGURE QUEUE/AGENT SETTINGS: BASIC SETTINGS

1. Login to online account
2. Click Contact Center
3. Click Configure following appropriate queue
4. Click the View / Edit option following Agents
 - Click arrows to move Available Agents to Assigned Agents
 - Click Save
5. Click the View / Edit option following Contact Center Status & Statistics
 - Select Statistics Report Settings tab
 - Check to Enable Daily Reports / Uncheck to Disable
 - Enter appropriate ▪ Statistics Source ▪ Reporting Period and ▪ Email Addresses
 - Click Save
 - Click additional tabs to view ▪ Queue Status or ▪ Queue & Agent Statistics
6. Click the View / Edit option following Supervisors
 - Click Supervisors tab
 - Click arrows to move Available Supervisors to Assigned Supervisors
 - Click Save
 - Click Agents tab
 - Select appropriate Supervisor
 - Click arrows to move Available Agents to Assigned Agents
 - Click Save
7. Click the View / Edit option following Announcements
 - Select ▪ Entrance Message ▪ Estimated Wait Message ▪ Comfort Message
 - Music On Hold or Message or Call Whisper Message
 - Click to Enable / Disable selected message type
 - Select Audio: ▪ Default ▪ URL or ▪ Custom
 - (OPTIONAL) Upload Custom Message
 - Click Choose File
 - Select appropriate file from popup window
 - Click Save
8. Click the View / Edit option following Weighted Call Distribution
 - Enter percentages of calls to allocate to each Assigned Agent
 - Click Save

NOTE: Custom greeting upload must be a wav file in CCITT u-Law, A-Law, 8kHz sampling rate, or 8-bit Mono format and should not exceed 4.5 MB

NOTE: Weighted Call Distribution must be set as Group Policy in queue profile before it appears under Configure options. Total number assigned to all agents must be 100%.

ADVANCED SETTINGS

1. Login to online account
2. Click Contact Center
3. Click Configure following appropriate queue
4. Click the View / Edit option following Distinctive Ring
 - Check to Enable / Uncheck to Disable
 - Select appropriate Ring Pattern for ACD calls
 - Click Save
- 5. Click the View / Edit option following DNIS
 - Check to Enable / Uncheck to Disable DNIS Display and DNIS Priority settings
 - Click Save
 - Click Add
 - Select Configure DNIS tab
 - Enter DNIS Name and other appropriate settings
 - Click ▪ Entrance Message ▪ Estimated Wait Message ▪ Comfort Message ▪ Music On Hold or ▪ Call Whisper Message to upload custom DNIS greetings for that message type
 - Click Save
- 6. Click the View / Edit option following Queue Status Notification
 - Check to Enable / Disable:
 - Notification of queue status to agent devices
 - High volume notification thresholds
 - Click Save
- 7. Click the View / Edit option following Call Disposition Code
 - Check to Enable / Disable appropriate actions
 - Click Save
 - Click Add
 - Enter Code and Description in popup window
 - Click Save

ROUTING POLICIES

1. Login to online account
2. Click Contact Center
3. Click Configure following appropriate queue
- 4. Click the View / Edit option following Forced Forwarding - ACD
 - Click On to Enable / Off to Disable
 - Enter appropriate Phone Number or SIP-URI
 - Check to Enable / Uncheck to Disable appropriate actions
 - Select Audio: ▪ Default ▪ URL or ▪ Custom
- 5. Click the View / Edit option following Holiday Service - ACD
 - Select appropriate Holiday Schedule routing action
 - Select appropriate Holiday Schedule
 - Check to Enable / Uncheck to Disable announcement
 - Select Audio: ▪ Default ▪ URL or ▪ Custom
- 6. Click the View / Edit option following Night Service - ACD

- Select appropriate Night Service routing action
- Select appropriate Business Hours
- Check to Enable / Uncheck to Disable appropriate actions
- Select Audio: ▪ Default ▪ URL or ▪ Custom
- 7. Click the View / Edit option following Bounced Calls - Queue
 - Check to Enable / Uncheck to Disable appropriate actions
 - Click Save
- 8. Click the View / Edit option following Comfort Message Bypass - Queue
 - Click On to Enable / Off to Disable
 - Select Audio: ▪ Default ▪ URL or ▪ Custom
- 9. Click View / Edit option following Overflow - Queue
 - Check to Enable / Uncheck to Disable appropriate actions
 - Select Audio: ▪ Default ▪ URL or ▪ Custom
- 10. Click the View / Edit option following Stranded Calls - Queue
 - Check to Enable / Uncheck to Disable appropriate actions
 - Select Audio: ▪ Default ▪ URL or ▪ Custom
 - Click Save
- 11. (OPTIONAL) Upload Custom Message for a specific call type
 - Click View / Edit option following appropriate Routing Policy
 - Select Custom
 - Click Choose File
 - Select appropriate file from popup window
 - Click Save

NOTE: Custom greeting upload must be a wav file in CCITT u-Law, A-Law, 8kHz sampling rate, or 8-bit Mono format and should not exceed 4.5 MB

GLOBAL CONTACT CENTER SETTINGS

BASIC SETTINGS

1. Login to online account
2. Click Contact Center
3. Click the View / Edit option following Agent Default Settings
 - Select ▪ Default or ▪ Enterprise for ▪ Use Guard Time and ▪ Use Agent Unavailable Settings
 - Check to Enable / Uncheck to Disable appropriate actions
 - Click Save
- 4. Click the View / Edit option following Agent Unavailable Codes
 - Click to Enable / Uncheck to Disable:
 - Agent Unavailable Codes
 - Force use of Agent Codes Unavailable with default code
 - Click Add
 - Enter Code and Description in popup window
 - Click Save
- 5. Click the View / Edit option following Call Disposition Codes
 - Click Add
 - Enter Code and Description in popup window
 - Click Save
6. Click the View / Edit option following Contact Center Routing Policies
 - Select Longest Wait Time or Priority Order
 - Enter appropriate weighted percentage for each queue
 - Click Save

REPORTING SETTINGS

Default settings recommended. Contact support before making changes to Reporting Settings.

AGENT AND SUPERVISOR SETTINGS

1. Login to online account
2. Click Settings
3. Click the View/Edit option following Contact Center
4. Select appropriate Agent ACD State
5. Check to Enable / Uncheck to Disable Outgoing Caller ID
 - Select appropriate Outbound Phone Number
6. Select ▪ Default or ▪ User for ▪ Use Guard Time and ▪ Use Agent Unavailable Settings
 - Check to Enable / Uncheck to Disable appropriate actions
7. Check to Enable / Uncheck Disable to Join agent to appropriate queue
8. Click Save
9. Click the View / Edit option following Client App
 - Click link to be directed to Client App login screen
10. Click the View / Edit option following Supervisors to manage assigned queues/agents

NOTE: To login to Agent / Supervisor Client, add the domain name @mymtm.us to the end of your online account username and enter your usual password. Ex: username@mymtm.us

TELEPHONE INSTRUCTIONS

Contact Center Feature Access Codes:

- [#82] Monitor Agent
- [#84] Monitor Next Call
- [#33] Barge-In to Call
- [#70] Activate Night Service Manual Override
- [#71] Deactivate Night Service Manual Override
- [#72] Activate Forced Forwarding
- [#73] Deactivate Forced Forwarding
- [#80] Place call as call center
- [#81] Place personal call
- [#83] Place call to supervisor
- [#57] Place customer originated trace

CONTACT CENTER FEATURE GLOSSARY

GROUP POLICIES

Selection determines how incoming calls are distributed to available agents. Hunting options include:

Circular: Hunt agents in order listed on queue profile, starting where the last call left off.

Regular: Send calls to first available agent on list, always beginning at the top of the list.

Simultaneous: Ring all agents at the same time; first user to answer handles the call.

Uniform: Send calls to the agent that has been idle the longest.

Weighted Call Distribution: Distribute calls to idle agents in correspondence to percentages assigned to user in Contact Center profile. Feature enables skill-based routing.

ROUTING POLICIES

Automatic Call Distribution (ACD) recognizes, answers and routes incoming calls. Options include:

Forced Forwarding: Temporarily redirect incoming calls to a different destination than the set route for Night Service or Overflow. Forced Forwarding does not affect calls already in queue.

Holiday Service: Set specific routing actions for calls received during user-defined holiday schedules. Holiday Service can perform busy treatment, transfer call or play announcements.

Night Service: Route calls differently after user-defined scheduled business hours. Night Service actions can be set to perform busy treatment, transfer call or play an announcement.

Bounced Calls: Calls routed to an agent but not answered within a set number of rings.

Overflow: Calls that exceed the threshold of Queue Length or wait time configured for queue.

Stranded Calls: Calls that are in the queue when there are no agents signed-in to queue.

PREMIUM FEATURES

Agent Codes Unavailable: Create or enable a set of customized Unavailable codes showing the reason the agent is in unavailable ACD state. Conditions to force agent ACD state to Unavailable include Do Not Disturb, Personal Calls and Consecutive bounces.

Call Disposition Codes: Apply during call or at wrap-up to tag calls in reports to track the result of promotions, the result of calls, the purpose of calls, or other items. Administrators can create and customize up to 1000 Disposition Codes.

DNIS: Determine what phone number was dialed with Dialed Number Identification Service (DNIS). Assigning specific agents, types of calls, and/or priority levels to each DNIS ensures that each incoming call is handled with optimal efficiency.

