IPFX Administrator

Product version 4.3 SP4



About This Guide

The purpose of this document is to provide the user with information on how to use this IPFX product.

Typographical Conventions

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Triangular Bullet(Ø)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
Emphasis	Use to emphasize the importance of a point or for variable expressions such as parameters.
CAPITALS	Names of keys on the keyboard. for example, SHIFT, CTRL, or ALT.
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.
DIR ✓	Information that applies to the IPFX Director platform only.
©CM ✓	Information that applies to the IPFX for CallManager platform only.
NEC V	Information that applies to the IPFX for NEC platform only.

See Also

About This Guide

Getting Help

Getting Help

Press **F1** within any IPFX screen for online product help.

Log a call with our Helpdesk if you have questions or problems using an IPFX product.

IPFX Limited (previously known as Performance Solutions) ABN 85 083 372 696

Postal Address: PO Box 105 079, Auckland Central, New Zealand

Website: http://www.ipfx.com

Sales/Channel Enquiries: sales@ipfx.com

New Zealand Help Desk: e support.nz@ipfx.com p +64 9 357 1155

Australia Help Desk: e support.au@ipfx.com p +61 2 9779 3998 or 1300

737 367

United Kingdom Help Desk e support.uk@ipfx.com p 0870 850 2058

See Also

About This Guide

Typographical Conventions

What is IPFX Administrator?

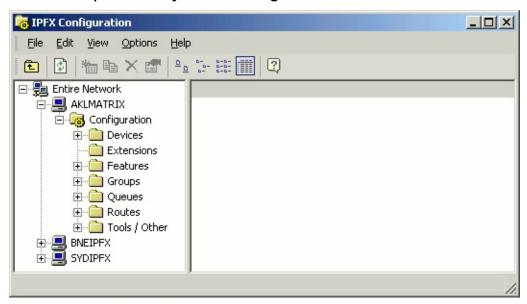
IPFX Administrator is a license that, if purchased, adds a button to the IPFX toolbar that allows the IPFX Administrator to access system configuration options

To access IPFX Administrator configuration options:

- In the IPFX for Outlook client, click:

 Config
- In the IPFX for Lotus Notes client, click: Configuration
- In the IPFX Live Desktop client, click: Configuration
- In the IPFX Live Toolbar client, click:

This will open the system configuration screen:



Note: A history of all additions, deletions and changes made to the IPFX Configuration can be viewed in ann audit trail report; click **Reports>Site Information>Audit Trail Report** on your IPFX client toolbar.

Devices

Within this Folder, you have the following configuration options:

Phones

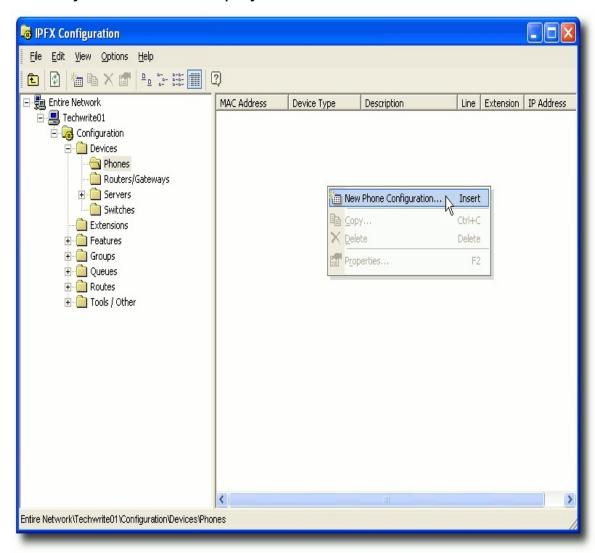


PBX Dependent Feature!

From this folder the IPFX Administrator can set up a phone or device on IPFX Director.

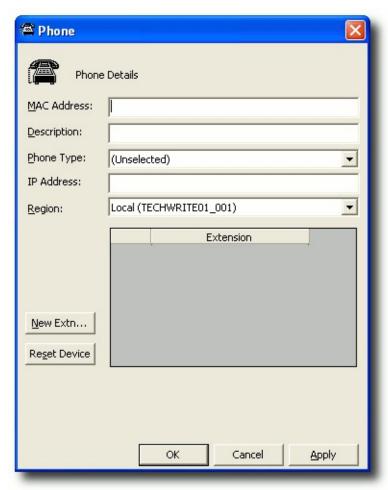
To set up a phone or device on IPFX Director

1. Open the **Devices>Phones** subfolder and right-click on the right side of your screen to display the shortcut menu, i.e.



2. Click on New Phone Configuration...

3. The Phone configuration window appears:



- 4. Enter the **MAC Address** of the phone.
- 5. Enter the **Description** of the device.
- 6. Select the device's **Phone Type** from the drop-down menu.
- 7. Enter the **IP Address** of the Device.
- 8. Select the **Region** the device is in. Refer to Regions for further information.
- 9. Click **New Extn...** and add the Extension to the IPFX Directory. For further information on adding an extension, refer to <u>Add/Edit/Delete</u> an Extension.
- 10. When the extension has been set up, click Apply.
- 11. Select **Line 1** from the drop menu this is the extension that you have set up.

- 12. Select Line 2 if applicable.
- 13. Click Apply.
- 14. Click OK.

Note: If you install a phone/device onto the Network, it will automatically do a basic configure in this section. You will need to configure the extension for IPFX.

If you install a phone on the Network, IPFX will supply a dummy extension number that has access to call internal extensions or any other networked extension on the LAN. It cannot make calls out through the Gateway.

Note: Do not leave phones in this unconfigured state, as you will not be able to make emergency calls out of the organization if required.

To install a phone to be automatically added to this directory

- Dial a voicemail port e.g. 51, to set up the device. You will then hear "Welcome to the Hot Desking System" and be asked for your extension number.
- 2. Enter your extension number. You will then be asked to enter your Password.
- 3. Enter '0000' (the default). The phone will reset.

Note: If you dial the voicemail again to complete the setup, you will be stepped through the 'first time voicemail setup'

See Also

Devices

Routers/Gateways

Using the Router Setup Wizard

Servers

Switches

Routers/Gateways



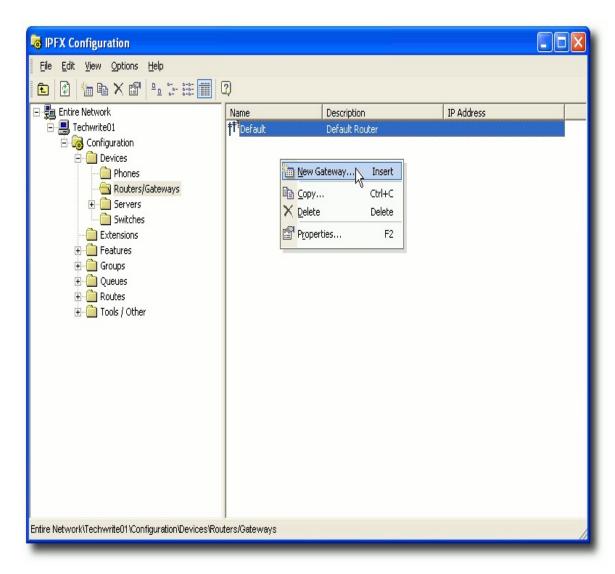
PBX Dependent Feature!

Note: Multiple gateways are supported in IPFX 4.3.

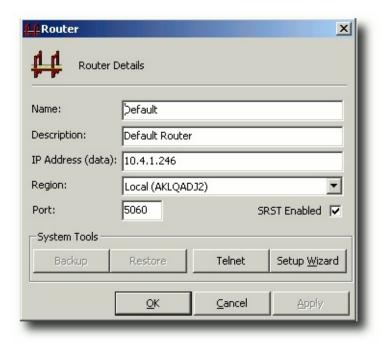
From this folder the IPFX Administrator can set up a router/gateway (a router/gateway provides gateway functionality between the Public Telephony Network (PSTN) and the IP Telephony Network). This also provides other Network functions.

To enter a router/gateway

1. Open the **Devices>Routers>Gateways** subfolder and right- click on the right side of your screen to display the shortcut menu.



2. Click on **New Gateway...** to display the Router Details Screen.



- 3. Enter the Router/Gateway **Name** this is a text description and is not critical to the Router detail.
- 4. Enter the **Description** this is a text description and is not critical to the Router detail.
- 5. Enter the IP Address (data) of the Router/Gateway.

Important! It is critical you enter the correct IP Address in this field

- 6. Select the **Region** from the drop-down menu. Each gateway is associated with a region. Extensions within a region use this gateway by default.
- 7. Enter the **Port** number (default is 5060).

System Tools

The Backup and Restore buttons in the System Tools area of the Router/Gateway window are used to perform backup procedures on the Router/Gateway. These buttons are disabled if a username and password are not supplied in the **Setup Wizard** screen.

Telnet is used to connect directly to the router.

The **Setup Wizard** button allows you enter information to configure the Router.

Note: If you Restore or Reset a Router/Gateway, all specialized configuration that is not part of the original template will be eliminated. Please ensure any additional changes that are part of the Router/Gateway setup are put in place manually.

See Also

Devices

Phones

Using the Router Setup Wizard

<u>Servers</u>

Switches

Using the Router Setup Wizard

The Router Setup Wizard enables you to easily create and deploy configuration scripts for a number of routers.

To run the router Setup Wizard:

- 1. Click on the **Config** button in an IPFX client application.
- 2. Locate the folder Configuration > Devices > Routers/Gateways.
- 3. Double-click on the router that you want to configure.
- 4. Click the Setup Wizard button.

See Also

Devices

Phones

Routers/Gateways

Servers

Switches

Servers

In This Section

Inter Server Networking

<u>Settings</u>

See Also

<u>Devices</u>

Phones

Routers/Gateways

Using the Router Setup

Wizard

<u>Switches</u>

Inter Server Networking

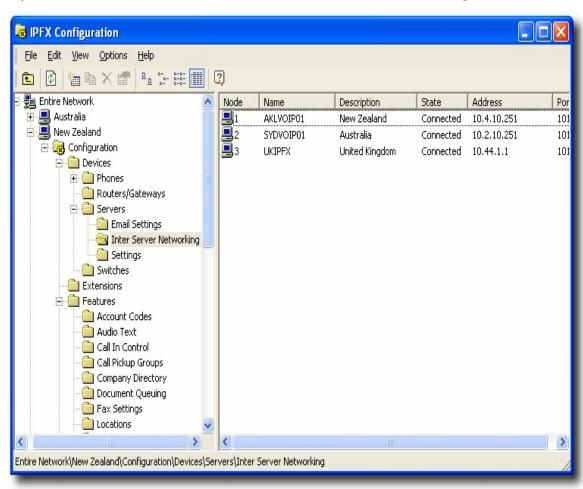
Note: This module is only active if the Networking Module has been enabled.

Inter Server Networking enables multiple IPFX Servers to share information about their clients' phone states, location states and directory details.

The Inter Server Networking subfolder identifies each Networked Server at the selected sites, along with node information. Use this screen to view, modify, add or delete network nodes.

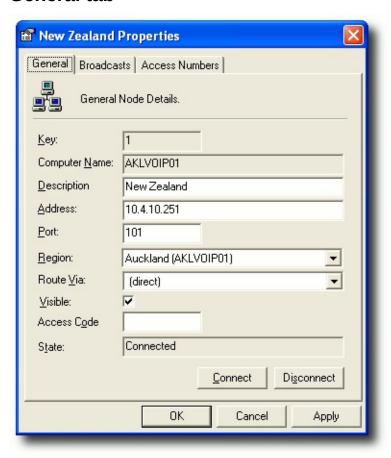
To view the Inter Server Networking Screen:

Open the Devices>Servers>Inter Server Networking subfolder:



2. Double-click on the selected Server to display the Properties Screen.

General tab

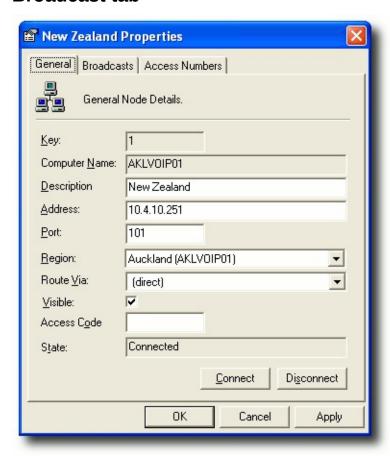


- **Key** A unique number identifying each node.
- Computer Name The Windows computer name of the selected node.
- **Description** A phrase describing the node. This phrase will identify the node in client's directory screens.
- Address The IP address of the node.
- Port Inter Server Networking data is sent over port 101 by default, so as not to conflict with the local call state data sent on port 100.
- Region The Region to which the node belongs.
- Route Via Call state data can be routed directly to the master node, or via other Inter Server Networking nodes.
- **Visible** Determines whether the selected node (and its clients) are visible in the directories of other nodes' clients.
- Access Code
- State Shows whether the node is currently connected via Inter

Server Networking.

- **Connect** Click to reconnect the selected node.
- **Disconnect** Click to disconnect the selected node.

Broadcast tab



This allows you to specify which of the networked Voicemail Servers can see this Voicemail Server via Inter Server Networking.

Access Numbers Tab



Note: 0 extensions on multiple sites will not show through networking, only the 0 for the local site. Duplicate extensions should not be set up as they will not display.

See Also

Servers

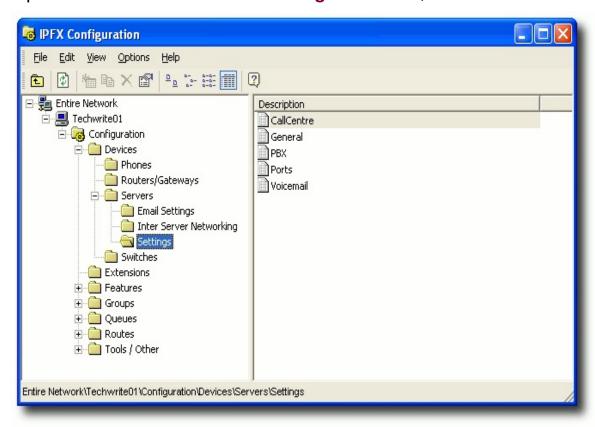
<u>Settings</u>

Settings

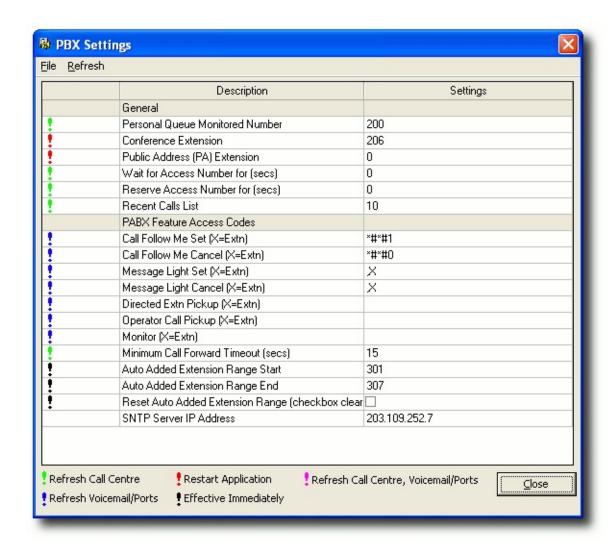
The subfolder gives the IPFX Administrator access to the overall Company Settings for relevant Services i.e.: Call Centre, General, PBX, Voicemail, Ports.

To access the Servers folder

1. Open the **Devices>Servers>Settings** subfolder, i.e.



2. Double-click on the required Service to display the company settings screen:



3. Check/uncheck or make a selection from the drop-down menus as required.

This is where the IPFX Administrator carries out maintenance, alterations, resetting passwords to the individual server settings.

For further information about changing settings, please refer your PBX Vendor (Reseller).

In This Section	See Also
General	<u>Servers</u>
Voicemail	Inter Server Networking

General

Restricted Access Codes (System)

Default restricted number prefixes for messagebox-based transfers. (Commaseparated list).

Restricted Access Codes (Extn Default)

Default restricted number prefixes for extension-based transfers. (Comma-separated list).

See Also

<u>Settings</u>

Voicemail

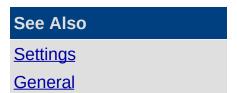
Voicemail

Enable Off Site Transfers (System)

Allows offsite transfers via a messagebox.

Enable Off Site Transfers (Extn default)

Allows offsite transfers via an extension.



Switches

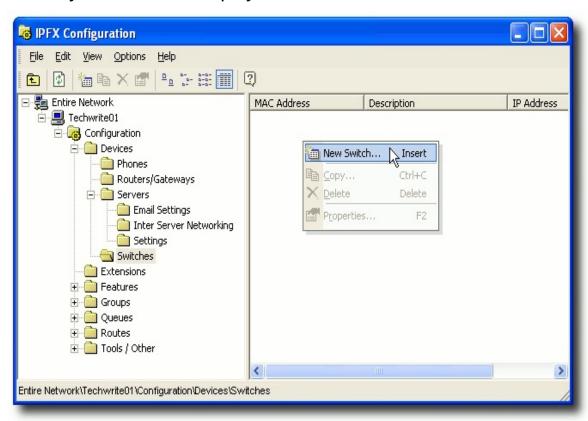


PBX Dependent Feature!

The IPFX server connects to a switch that provides LAN switching functions and inline power to the phones (depending on switch model).

To enter switch information

1. Open the **Devices>Switches** subfolder and right-click on the right side of your screen to display the shortcut menu, i.e.



2. Select **New Switch**, the screen below appears:



- 3. Enter the **Name** of the IPFX switch (this text field should match the configured host name of the switch).
- 4. Enter the **Description** of the IPFX switch (text field).
- 5. Enter the **IP Address** of the IPFX Switch.

Important! It is critical that you enter the correct IP Address in this field

System Tools

The Backup and Restore buttons in the System Tools area of the Switch window are used to perform backup procedures on the Switch..

Telnet is used to connect directly to the switch.

The **Setup Wizard** button allows you enter information to configure the switch.

Note: If you Restore or Reset a switch, all specialized configuration that is not part of the original template will be eliminated. Please ensure any

additional changes that are part of the switch setup are put in place manually.

See Also

Devices

Phones

Routers/Gateways

Using the Router Setup Wizard

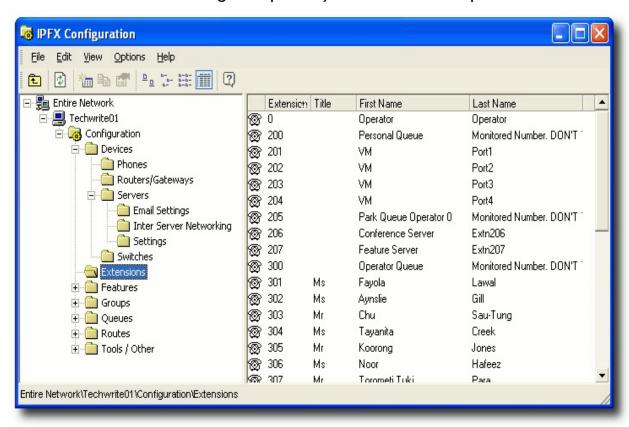
<u>Servers</u>

Extensions

What is an Extension?

Every mailbox in a company requires an extension number that is usually configured to match the staff member's DDI/DID. It creates a mailbox that can be used.

You can have extension numbers, virtual extension numbers (ie for a number of staff accessing one phone) and for staff or queues.



See Also

Extensions

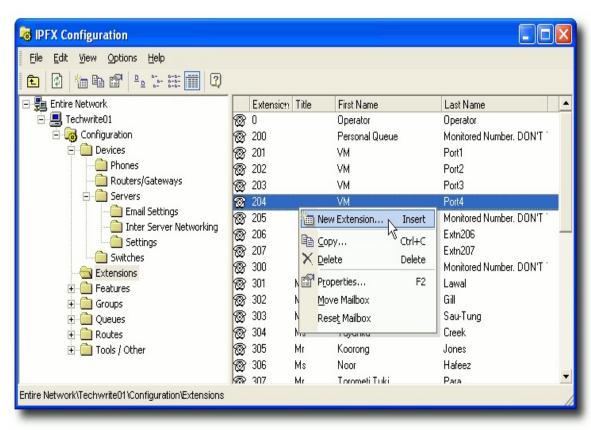
Add/Edit/Delete an Extension

Add/Edit/Delete an Extension

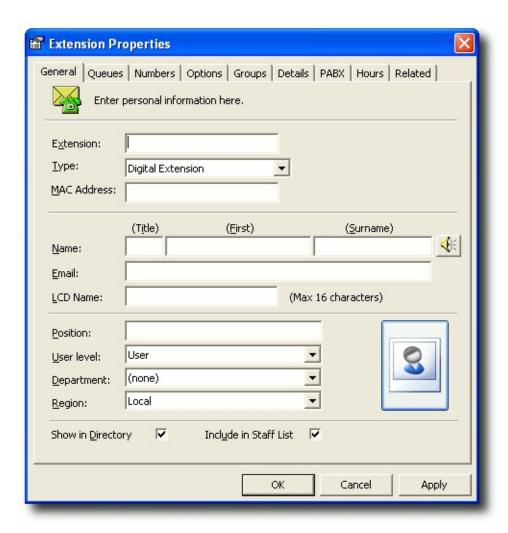
Open the **Configuration\Extensions** subfolder and right-click the right side of the screen (either on an extension to edit it or anywhere to create a new extension) to display the shortcut menu.

To create a new extension

Select New Extension from the Shortcut Menu.



2. A new extension **Properties** screen displays. The **General** Tab displays by default:



3. Enter the new extension details. Click **OK**. Instructions to complete each tab <u>follow this section</u>.

To copy an extension

- 1. Right-click on the extension that you wish to copy.
- 2. Select **Copy** from the context menu.
- 3. If you choose to Copy an extension, the new extension displays the Properties Screen with all the relevant fields populated except the extension number.
- 4. Enter the new extension number and click OK.

To delete an extension

1. Right-click on the extension you wish to delete.

- 2. Select **Delete** from the context menu.
- 3. If you choose to Delete an extension, you will be asked to confirm the action in a popup Confirm Delete screen.



4. Select Yes to confirm, No or Cancel to cancel the action.

Note 1: You can delete multiple extensions by highlighting one extension selecting SHIFT or CTRL to highlight additional extensions, then right click to Delete.

Note 2: (IPFX Director only) Deleting an in-use extension on Line 1 will cause a phone to be assigned an Auto-Added number.

To view an extension's properties

- 1. Right-click on the extension whose properties you wish to view.
- 2. Select **Properties** from the context menu.
- 3. The Properties screen appears, from which you many exit the properties of the extension.

To move a mailbox to a different extension number

- 1. Right-click on the extension whose properties you wish to view.
- 2. Select **Move Mailbox** from the context menu.



3. Enter the number of the extension to which you want to move the

selected mailbox.

4. Select **Yes** to continue or **No** or **Cancel** to cancel.

To reset a mailbox

Prompts you with a Reset Mailbox screen.



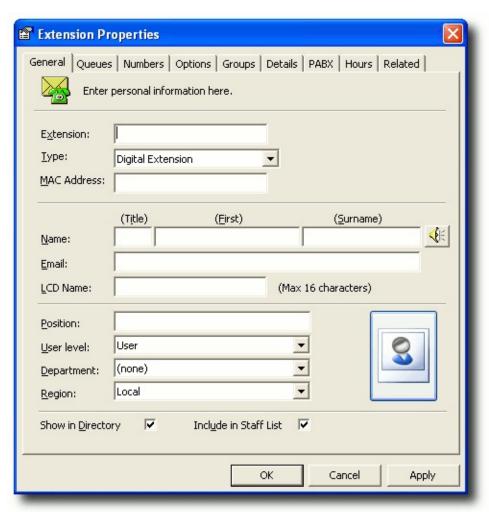
Select Yes to continue or No or Cancel to cancel.

Note: You can reset multiple mailboxes by highlighting one extension, pressing SHIFT or CTRL and clicking additional extensions to highlight, then right click to reset mailbox.



General Tab

This section describes the features on the Extension Properties General tab:



Extension

The extension number given to the mailbox when initially set up.

Note: ATA devices cannot be assigned to extension 0.

Type

Select the extension type from the drop-down menu:

- Analogue Extension An analogue phone
- Digital Extension Digital phone with an LCD screen
- Voicemail Port The ports that handle the announcements etc

- PHS Handset Hand Held NEC Dect Phone
- Monitored Number Queue pilot for call centre, monitors and manages calls
- Hot Line [NEC PBX only]



The **Tenant** field only appears in IPFX for NEC installations.

Tenanting allows several companies to share a single PABX. Each company is assigned a individual tenant number.

Extensions assigned to the same tenant number can dial one another directly. Depending on the PABX configuration, an extension assigned to a different tenant number may not be able to be dialled directly; it may only be reached by placing an external call (for example, by using the extension's DDI).

Enter the tenant number assigned to your company, or leave the default tenant number "1" if your company does not share the PABX.



Click the **Register** button to register an interest in the extension with a hardware-based PABX. Extensions are registered automatically when they are created, but in rare circumstances an extension may become unregistered and need to be re-registered manually via this button.

MAC Address

This field populates automatically.

First Name

The first name of the user assigned to this extension. This name will appear in the on-line directory and will be used to determine where the extension appears in the alphabetical sort order used by the voice guided directory (Staff Menu from Message Box/Audio Text).

Surname

The Surname of the user assigned to this extension. This name will appear in the on-line directory and will be used to determine where the extension appears in the alphabetical sort order used by the voice guided directory (Staff Menu from Message Box/Audio Text).

Email

The mailbox user's email address must be entered if using IPFX for Outlook, IPFX for Lotus Notes or IPFX Unified Messaging (Player only).

Note: This feature is only visible if you have the email integration option



(Record Name)

Click on the **Record Name** button to record the name of the mailbox's owner.

LCD Name

The name of the extension as you want it to appear on the LCD display of the phone.

Note: This feature only available on the IPFX Director platform or if you have purchased IPFX PBX Maintenance Interface (NEC MAT)

Position

User's position within the company, to appear in the online directory. For example: Office Manager.

User Level

Select the required User Level from the drop-down menu.

There are three standard User Levels, more can be created as required.

See <u>IPFX Authority Levels</u> for move information on user levels.

- Administrator has the highest security level which enables them to access the Config button.
 - Administrators also have full access to reports.
- Supervisor has access to changing Users in the Queues and Queue properties.

Supervisors can also utilize some reporting functionality.

 User has access to their own mailbox and shared resources such as the directory and groups.

Department

This is a drop-down box that lists your Department and Company Directory. By selecting a department, you are automatically adding the user to the Directory.

Region

A region allows a voicemail server in a central location to handle extensions in various time zones.

All displayed times and voicemail timestamps are calculated relative to the region's local timezone, NOT to the server's timezone.

For example: An extension located in Melbourne and belonging to a Sydney-based server would be set to the Melbourne *region*. Location return times and message timestamps for that extension will then be calculated according to the Melbourne timezone rather than the Sydney timezone.

Note: Each extension MUST have a region set up in extension properties. The region must be set up with a time bias (offset) to UTC (Universal Coordinated Time).

Show in Directory

If you have set up an extension (such as a Manager's extension) that you don't want people to see in the main Directory, you would not 'show in Directory'. Most user extensions should be shown.

If an extension is NOT shown in the directory it cannot be added to a queue.

Include in Staff List

This enables you to select or deselect if you wish an extension to be within the Staff List menu.

A Staff List Menu is a menu option that is available as part of the Audio Text, that enables callers to listen to a list of people within the company and then enter their correct extension number to go through to the

extension in question.

Register on Start Up



The Register On Startup checkbox is available on IPFX for NEC and IPFX for Call Manager.

When you are setting up the General tab, you can register the extension against the PABX by ticking the Register checkbox.

This will activate the real time status of the extension in the IPFX application immediately.

Note: This feature only available on the IPFX for NEC and IPFX for Call Manager platforms.

Note 2: You need to register an extension to enable a IPFX Contact Centre agent to function and to report on extension movements.

Note 3: You can register/unregister multiple extensions by selecting one extension, pressing Shift or Ctrl and clicking additional extensions to highlight, then right click to register/unregister.



욃 (Image)

Click on the Image button to attach a picture of the User of the extension. Pictures must be in GIF, or JPEG format, and must be less than 50kB in size.

See Also

Add/Edit/Delete an Extension

Oueues Tab

Numbers Tab

Options Tab

<u>Groups Tab</u>

Details Tab

PABX Tab

Hours

Related

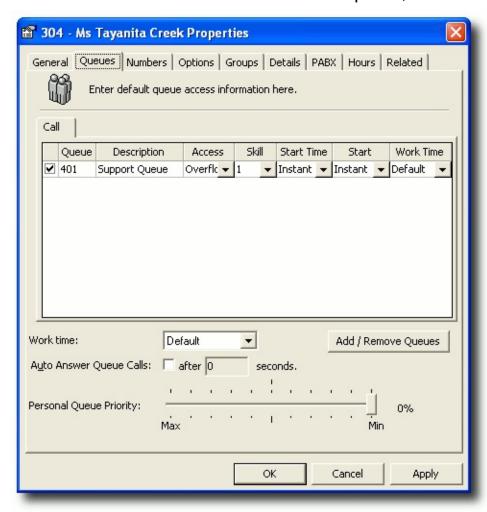
Queues Tab

Note: This feature only available if an IPFX Contact Centre module is purchased.

Each agent can be assigned to a queue and have different settings for each call depending on their skill base and requirements of the queue. An Administrator or Supervisor can configure the agents' settings. A user can view settings only.

Agents can be added to the queues through the Add/Remove Queues button in the extension properties OR Config Queues.

The Queues tab shows you which queues the agent is a member of and which extensions are members of each queue, i.e.



For information on Queues, please refer to Adding/Editing an Advanced

Queue.

See Also

Add/Edit/Delete an Extension

General Tab

Numbers Tab

Options Tab

Groups Tab

Details Tab

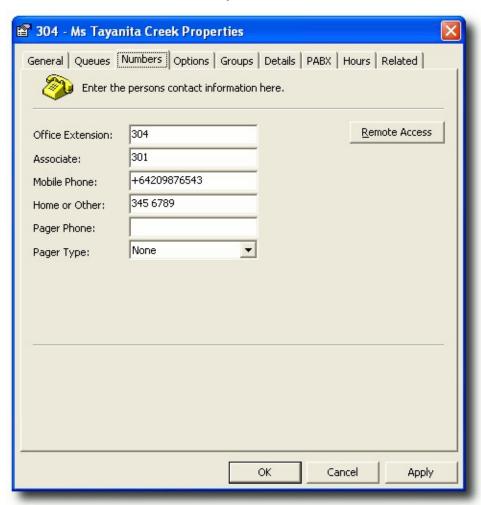
PABX Tab

<u>Hours</u>

Related

Numbers Tab

Agents can set their messages asking the caller to 'Press 1 for my associate', 'Press 2 for my mobile' and so on through the Location Settings button. However, they must have these numbers listed in the Numbers tab before this option can be activated.



Note: Many companies do not allow 'Off Site Transfers' as the cost of transferring to external phone numbers will be charged to the company, not the caller. Alternatively, agents may leave their mobile phone number as part of the voicemail message so that callers will be charged the cost of the call, not the company.

Note 2: If you have the IPFX Inter-Server Networking module we recommend you enter external phone numbers as +(country code)(area code)(number).

Office Extension

This must be the same as the extension set on the General Tab.

If it is not then you will not get on/off hook activity on the extension.

Associate

This may be a colleague or the next person in line to take the relevant calls.

Mobile Phone

Enter the mobile phone number of the agent. No spaces or outside line options are required.

Home or Other

Enter the home, external number or another number of the agent. No spaces or outside line options are required.

Pager Phone

Enter the pager number for the agent. No spaces or outside line options are required.

Pager Type

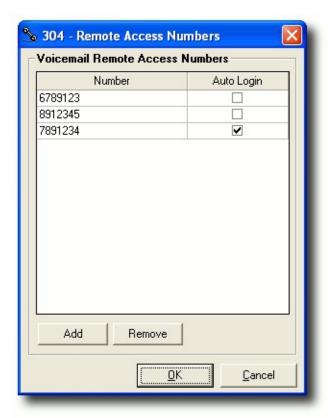
Select the page type from the drop-down box.

Remote Access

This button provides access to your list of Voicemail Remote Access Numbers.

A user dialling into their organisation's dedicated voicemail line from a listed remote access number experiences two convenient effects:

- 1. The IPFX system will deliver the call directly to the user's own voicemail mailbox, without prompting the user to enter his or her extension.
- 2. If the user has no new voicemail messages, the call will not be answered immediately by voicemail but will instead ring several times before being answered. This feature allows users to hang up immediately if they have no new messages, saving the cost of a call.



To add new remote access numbers

- 1. Click the Remote Access button.
- 2. Click Add.
- 3. Click in the Number box and enter new Remote Access number.
- 4. Check/uncheck the Auto Login box as required.

Note: Checking the Auto Login box causes the voicemail system to omit the password check when a user dials in to access voicemail from the corresponding number.

5. Click OK.

To remove a remote access number

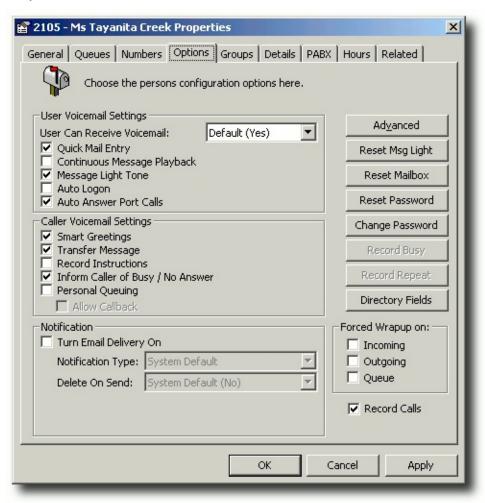
- 1. Click on the required number to highlight it.
- 2. Click the **Remove** button.
- 3. Click **OK** to return to the Numbers Tab screen.

See Also

Add/Edit/Delete an Extension
General Tab
Queues Tab
Options Tab
Groups Tab
<u>Details Tab</u>
PABX Tab
<u>Hours</u>
Related

Options Tab

Each extension can be configured independently based on the users requirements.



Users Can Receive Voicemail

Allows an extension to have voicemail or not.

Select from the drop down menu.

Note: If voicemail is set to 'NO' and a user forwards their phone to voicemail - the caller will route to the operator by default.

Quick Mail Entry

Allows users to listen to their new messages immediately after they have entered their password instead of having to listen to the VM Main Menu Options:

(i.e. 1 to Listen to Messages, 2 to Send a Message, 3 to change Locations etc.).

The default setting for this is ON.

Continuous Message Playback

If you do not want to hear the message options after each message is played, click on the checkbox to enable Continuous Message Playback. This will allow messages to be played back to back.

You can still use the message options for each message to save, delete etc but they won't be announced until all messages have been played. You will be able to save/delete all remaining messages.

The default setting for this is OFF.

Message Light Display

When a Voicemail message is left by a caller, the message light will show on your physical phone.

The default setting for this is ON.

Auto Logon

When this checkbox is selected, you will be able to push x1 (your code for voicemail i.e. 51 or 61) on your phone and instead of having to enter your password, you will be automatically logged on to voicemail.

Auto Answer Port Calls

When you want to record a Message Box, a Voicemail Message, etc, your phone rings and auto answers by default (on speaker phone). This option allows your phone to ring and the user to pick up the phone, instead of it auto answering, before timing out, i.e. for privacy.

Smart Greetings

Smart Greetings will inform your caller where you are and your expected return time for all locations other than Office. i.e. 'I'm sorry, John Smith is in a meeting until 3pm' (then your own personal location greeting is played).

If you do not use Smart Greetings, then you will need to re-record your greeting every time you are unavailable so your callers are kept informed of your current status.

The default setting for this is ON.

Transfer Message

This notifies the caller that they are being transferred. I.e. "Please hold while I transfer you now".

Record Instructions

Record Instructions are given to the caller after your greeting message. Voicemail will say 'Please record your message after the tone, at the end of your message press hash for further options'. The caller can then change the message options (ie, Urgent, Private, etc).

The default setting for this is OFF.

Inform caller of Busy / No Answer

If you are on a call or not answering your phone, the caller will be informed of your phone status. i.e. 'I'm sorry, that line is busy' or 'I'm sorry, there was no answer' (then your own personal standard or busy greeting is played).

The default setting for this is ON.

Personal Queuing

Personal Queuing is created when this setting is ON. The caller will be asked to Hold while you complete your current call or to press the hash (#) key to leave a message.

Retry on Busy will retry the extension after a set time ie. 30 seconds. If the line is still busy, the caller will be placed back on hold.

The default setting for this is OFF.

Click the **Record Busy** icon to record an announcement to be played to the caller on reaching your voicemail, if you are on the phone.

Click the **Record Repeat** button to record an announcement to be played to callers who are queuing.

The **Record Busy** and **Record Repeat** fields are "greyed out" when the Personal Queuing option is OFF.

Allow Callback

You must have Personal Queuing checked.

By setting Allow Callback to ON, the caller will be prompted for his phone number and the message/number played to you once your current call is completed.

The default setting for this is OFF.

Note: To enable Callback in a Call Centre scenario, you need the to purchase the IPFX Queue Callback module

Notification

Users can be advised by email when they have a voicemail message.

Check the **Turn Email Delivery On** box.

Select a **Notification Type** from the drop-down menu.

- System Default Providing you have Outlook 2000 (or later) Integration, the system default will be Notification with a .wav file.
- Notification This will send an email to your email client notifying you that you have a message in your message box.
- Notification with .wav file This will send an email to your email client notifying you that there is a message in your message box with the .wav file attached. You will still need to listen to the message through your Voicemail to delete it.
- VM Form This will send an e-mail to Outlook 2000 allowing the user to open and listen to the message through their phone. No .wav file is attached.
- VM Form with .wav file This will send an e-mail to Outlook 2000 allowing you to open and listen to the message through your phone or computer speakers. The attached .wav file can be saved and listened to at a later date if required.
- Notification with .psl file This will send email notification with a .psl attachment. This attachment is used by the IPFX Unified Messaging (Player only) player application. This is most often used with email clients other than Outlook or Lotus, such as Eudora or Pegasus.

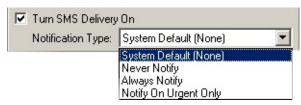
Select a **Delete on Send** policy

■ When you delete a .wav file attachment you can specify if you want the .wav file attachment to delete when you send a message. This will reduce the space used in your email client/exchange. Select Yes/No from the drop down menu (the default is No).

SMS Delivery

Users can be advised by text message when they have a voicemail message.

- 1. Check the Turn SMS Delivery On box.
- 2. Select **Notification Type** from the Drop down menu.



Forced Wrapup

These checkboxes when ticked will force wrapup codes onto all calls in the selected category for the extension selected.

An extension that has forced Wrapup codes on Queue calls will not be able to receive a second queue call until the first has been wrapped up.

Please ensure that if this is set, the extension has activated Wrapup Codes within the Call Popup screen (refer the IPFX Client Technical manual for instructions how to do this).

Refer to Config\Queues\Queue Item Types for setting Global Extension Settings and Config\Queues for setting Wrapups that apply to relevant queues.

Record Calls

(Requires IPFX Voice Capture Server or IPFX Voice Capture Solo Client)

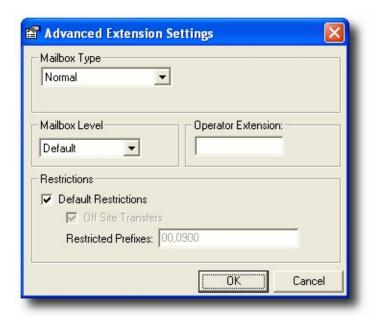
Check this box to allow the extension's calls to be recorded/monitored by IPFX Voice Capture Solo Client or IPFX Voice Capture Server. Both inbound and outbound calls will be recorded.

Note: When a new extension is created this setting is turned off.

Advanced

Click on the Advanced Button.

This will display the Advanced Extension Settings screen.



A description of the fields on this screen is set out below.

Click on the drop down menu button to display the menu below.

Mailbox Type

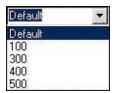


- Normal: This is the default Mailbox Type for every new extension if it is set to User (see User Level).
- Multi Mailbox Master: A feature that allows the Extension to be set up with mailboxes for more than one user. Not a commonly used feature.
- Multi Mailbox Member: A feature that allows multiple users to use the one phone to retrieve their messages. Ie. The caller would select 1 to speak to Angela Jones, 2 to speak to Bob Smith and so on. Not a commonly used feature.
- Use Message Box: This option does not let the caller leave a message. It is an option message box only. Ie. Angela Jones is currently on Maternity Leave. To speak to her replacement press 1, to transfer to the operator press 2. Thank you.
- Use Voicemail: This mailbox type allows multiple extensions to 'pool'

their messages into one message box.

Use Mailbox: Not currently used.

Mailbox Level



Mailbox Level controls the version of Voicemail that is at your company.

It is normally set to default based on the initial set up, however some extensions can be configured backwards. i.e. 100 does not include locations so therefore a queue extension may be changed to this to ensure people do not change a queue status.

Note: You cannot upgrade your version of Voicemail by changing the Mailbox Level.

Operator Extension

Set individually if there is a subset of operators. i.e. Press 0 for the operator can direct the call to a particular operator who is relevant for that department or group.

Restrictions

Default Restrictions

Default restrictions are decided by the customer at the point of install.

If the Company default allows Off Site Transfers, this option is available at the Company's discretion.

Off Site Transfers

The administrator can set individual extensions to have or not have access to Off Site Transfers.

To override the Default Restrictions clear the Default Restrictions box.

The offsite transfers option will automatically be enabled.

Restricted Prefixes

By default 00 (International) and 0900 (User Pay lines) are set to restricted transfers.

If you want to add more restrictions, click to clear the Default Restrictions checkbox.

You can limit the type of phone numbers that users can transfer calls to by adding more restrictions i.e. 021, 025, 027.

To add prefixes :-

Clear the Default Restrictions checkbox.

Add the prefixes to the Restricted Prefixes text box.



The example above shows Off Site Transfer calls do not include International, 0900 calls or mobile calls. Therefore a call could be transferred to an 0800 number or a National number.

Reset Message Light

If a message light stays on the phone after the user has retrieved all their messages, you can reset it for the user, by clicking on the Reset Message Light button.

Reset Mailbox

You can reset a Mailbox if one of your users leaves or agents need to be moved around.

You will be prompted to confirm the Mailbox Reset.



Click Yes to Reset or No to Cancel.

This will take the mailbox back to a first time setup.

Note: It is worth resetting the Password and clearing messages before resetting the mailbox to ensure customers have not been left unattended.

Reset Password

If a user forgets his/her password, you can click on the Reset Password Button and they can reset it next time they access their mailbox from Voicemail.



Click **Yes** to Reset or **No** to cancel.

To enter the new password, pick up your phone and access the voicemail mailbox (e.g. 51). ou will be asked to enter your new password.

Change Password

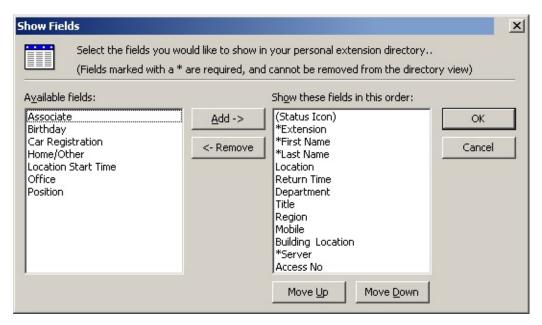
Passwords can be changed by clicking on the Change Password button. The screen below displays:



- Enter new password.
- Confirm new password.
- Click OK if correct, or cancel if not.

Directory Fields

Click on the Directory Fields button Directory Fields to display the Show fields screen.



- Select fields required.
- Use Move UP/Move Down buttons to place selected fields in required order.
- Click OK when completed.

Note: This is for individual extensions only

See Also Add/Edit/Delete an Extension General Tab Queues Tab Numbers Tab Groups Tab Details Tab PABX Tab Hours Related

Groups Tab

In This Section

Personal Voicemail Distribution Groups

Personal Contact Groups

See Also

Add/Edit/Delete an

Extension

General Tab

Queues Tab

Numbers Tab

Options Tab

Details Tab

PABX Tab

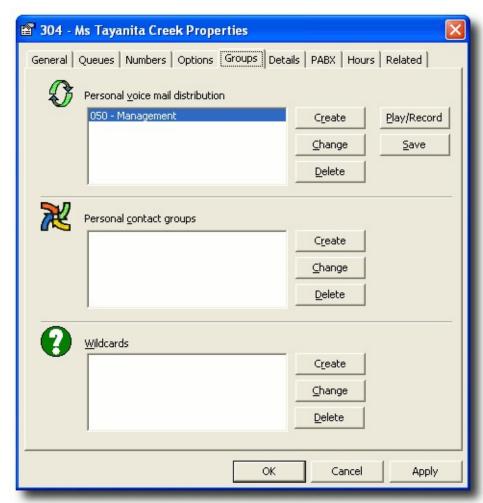
Hours

Related

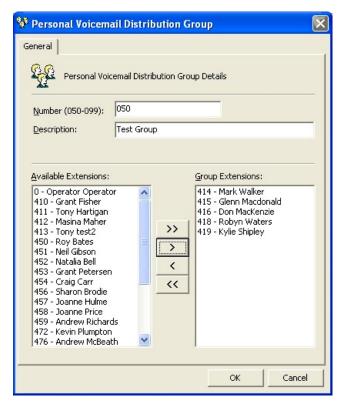
Personal Voicemail Distribution Groups

To set up/edit your own Personal Voicemail Distribution groups:

- Right-click on your Extension in the Directory and select Properties.
- Select the Groups Tab.
- Select Create/change Personal Voicemail Distribution Groups to add or edit a Group.



 When you select create/change, the following screen populates, enabling you to select the extensions and click the > (Move) button to add to the Group Extensions.



Click OK when this group has been set up.

Note To select more than one extension at a time, hold down the Ctrl Key.

To Change The Members In A Personal Distribution Group

- 1. Click Change.
- 2. Select/Highlight the Group you want to change from within the drop-down box.
- 3. Select/Highlight the Group Members you want to change from the Group Extensions.
- 4. Click the < (move) button to Add individual member/s to your Group, or
 - click the > (remove) button to Remove the individual member/s to your Group.
- 5. Click Apply.
- 6. Click OK.

To Delete A Personal Voicemail Distribution Group

- 1. Select/Highlight the Group you want to Delete from the drop-down box of available distribution groups.
- 2. Click **Delete**.
- 3. Click **OK**, the Group will be Deleted.

Note: To Add all available Extensions to your Personal Voicemail Group click >> (Move All) button. To Remove all available Extensions from your Personal Voicemail Group click << (Remove All) button. For more information on Personal Voicemail Groups, refer to your Voicemail User Guide.

See Also

Groups Tab

Personal Contact Groups

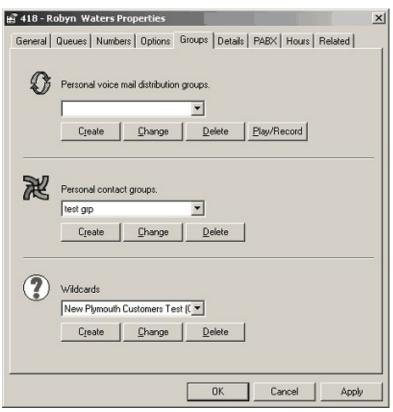
Personal Contact Groups

Personal Contact Groups enable you to create a group of contacts which include Extensions, External Contacts, and Wildcards. This Personal Contact Group can then be used when setting up a Call Profile that will enable you to route anyone calling from that contact group via the phone system to a specific destination of your choice, when all calls would normally route through to voicemail.

Note: IPFX Administrator will see the Call Pickup Groups for an NEC PABX Platform under Personal Voicemail Distribution Groups.

To Create your own Personal Contact Groups

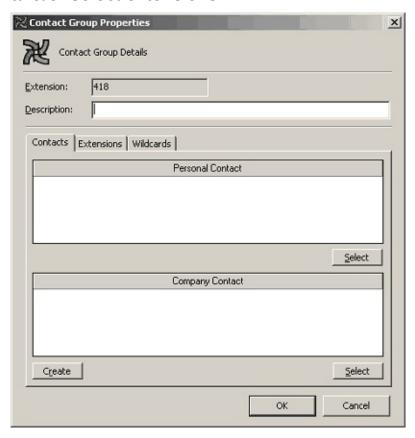
- Right-click on your Extension in the Directory and select Properties.
- Select the Groups Tab.
- Select Create or Change Personal Contact Groups to add to or edit a Group.



 When you select Create from the Properties Screen, Personal Contact Groups section, the following screen displays enabling you

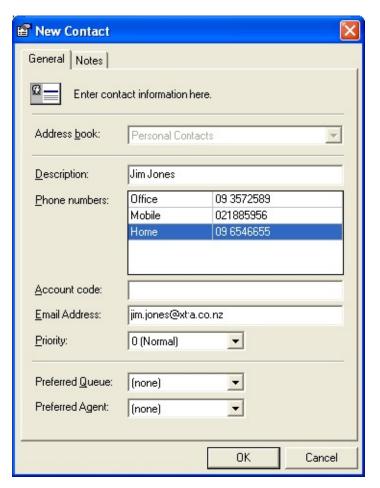
to either -

- Click the Select button to choose from the Contacts/Extensions/Wildcards currently active for the system, or
- Click the Create button to create a new Contact or Wildcard and/or select extensions.



To Create a Personal Contact

Click Create. The New Contact screen shown below displays. Enter relevant data for your contact. Select Personal Contact from the drop-down box.



Click OK when this contact has been set up.

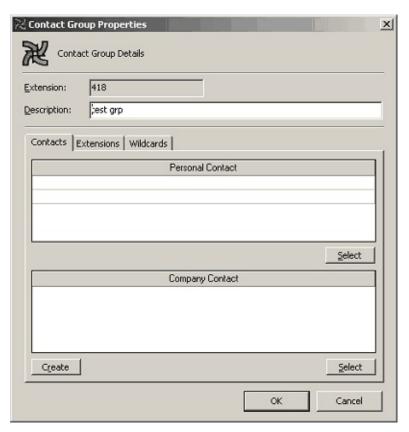
The new contact will be automatically selected in the **Contact Group Properties** view.

Adding a Personal Contact to a Contact Group

When you have created your Personal Contacts, you can add them to an existing Contact Group or create a New Group.

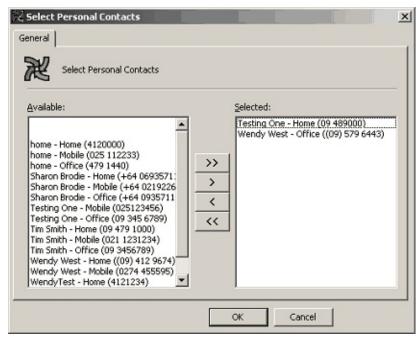
Click Change from the Properties Screen.

The Contact **Group Properties** Screen displays showing existing contacts for that group (if any).



 Click the Contacts Tab then click the Select button from this Screen.

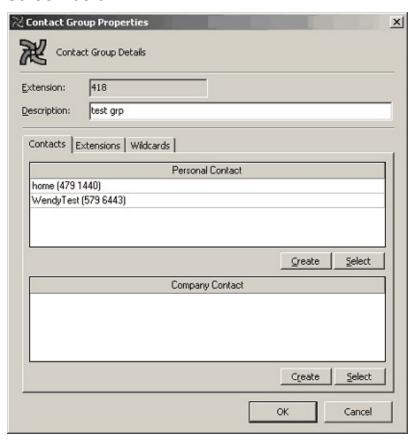
The **Select Personal Contacts** Screen displays showing existing contacts for that Group.



 Highlight the required contact(s) and click the >(Move) button to add the Selected Contacts.

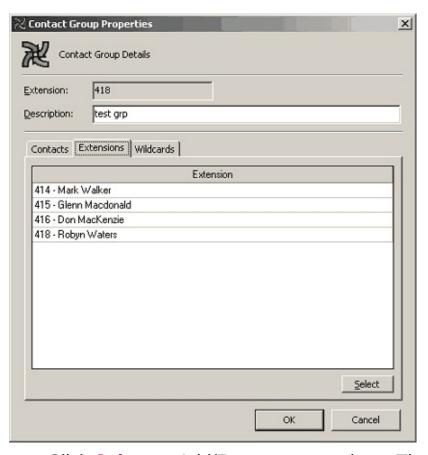
Click OK.

Your selections will then display in the Contacts field as shown in the screen below.

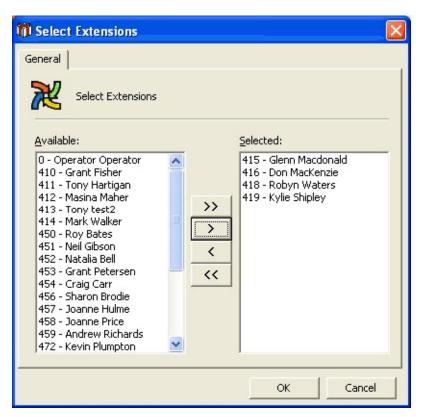


Adding Extensions to your Contact Group

Click the Extensions Tab from the Contact Group Properties screen.
 (The Screen below displays with the selected extensions for this group).



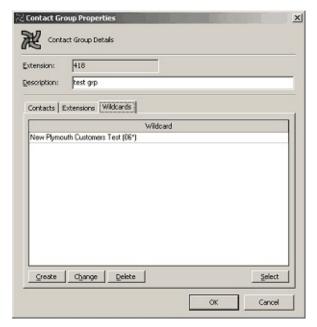
 Click Select to Add/Remove extensions. The Select Extensions screen displays.



- Add extensions to the Selected list by highlighting the Available extensions and clicking the > (Move) button.
- Click OK.

Adding Wildcards to your Personal Contact Group

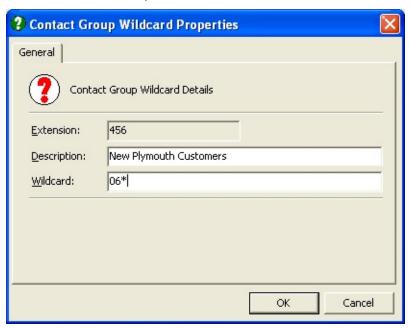
 Click the Wildcards Tab from the Contact Group Properties screen, as displayed below.



 Click Create to create a Wildcard to add to your Personal Contact Group.

The Contact Group Wildcard Properties Screen displays.

• Enter the Description and Wildcard details as required.



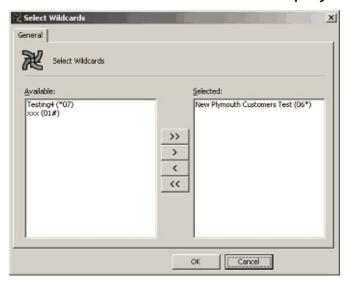
Click OK.

To Add an existing Wildcard to your Group

Click the Wildcards Tab from the Contact Group Properties screen.

• Click the **Select** button.

The **Select Wildcards** screen displays.



- Add/Remove Wildcards by selecting and using the < > (Move) buttons.
- Click OK.

Note: To select more than one item at a time, hold down the Ctrl Key.

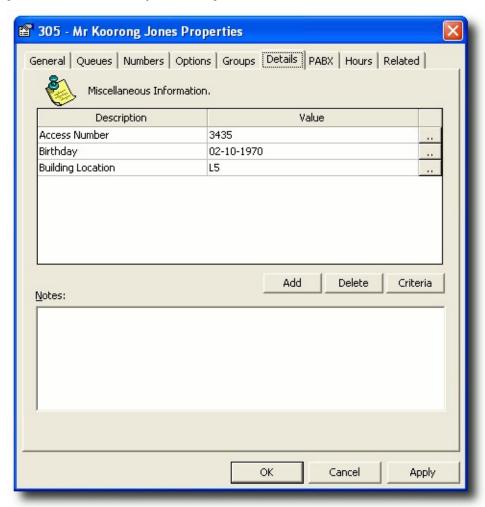
See Also

Groups Tab

Personal Voicemail Distribution Groups

Details Tab

IPFX allows you to keep track of Miscellaneous Information regarding your staff or the phone system.



Description

This gives administrators an option to add new fields for information they might require the user to enter. i.e.: Voicemail Training Dates, Employee Numbers. The description will be carried across all users' properties.

Value

There are two options for entering Value details dependant on whether the Value is 'free text' or derived from a 'criteria'.

1. If the value is selected from a drop-down criteria list, clicking the button will have the same effect as clicking the Criteria button.

2. If the value is free text you can type the value directly into the selected field.

Enter the required information into the screen, and click OK when complete.

This method provides a larger viewing area which is helpful when entering more complex details.

Note: Users can add to the value field by editing their own extension properties. If you do not wish for Users to have access to edit these fields, you can de-activate the User Feature Level for 'Users'.

In This Section

To Add a Field Name

To Delete a Field Name

To Add a Criteria Field

See Also

Add/Edit/Delete an

Extension

General Tab

Queues Tab

Numbers Tab

Options Tab

Groups Tab

PABX Tab

Hours

Related

To Add a Field Name

- Click on the Add button to add a new line across the Description/Value columns.
- Click once in new line and enter new Description.
- Click in Value field and enter Value.
 If you wish to enter a line space click the Shift and Enter key.
- Click OK.

Note: Take care when adding new items. They will be effective on all extensions.

See Also

Details Tab

To Delete a Field Name

To Add a Criteria Field

To Delete a Field Name

- Select the item you want to delete and click the Delete Button.
- You will be prompted to confirm your request.
- Click **Yes** to Delete or **No** to cancel.

Note: Take care when deleting items. They will be effective on all extensions.

See Also

Details Tab

To Add a Field Name

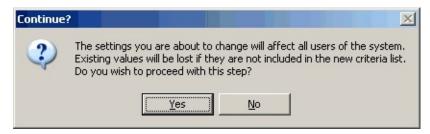
To Add a Criteria Field

To Add a Criteria Field

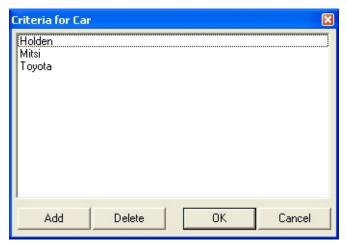
Allows the Administrator to set a list of values available to users from a drop-down box.

The criteria is set by the Administrator and prevents the agent from typing in different names or making spelling mistakes.

When you click the Criteria button the screen below displays.



- If you select Yes, you will cancel all existing values across all extensions.
- If you select **No**, the value remains as entered.
- Then click the Add button to add each option to the criteria list.



When you select **OK** the criteria list will be automatically sorted in Alphabetical order.

Note: Take care when using the Criteria feature. They will be effective on all extensions.

Notes

The Notes area of the Details tab can be used to store any information pertaining to the extension: for example, issues or even history of the

extension (i.e. who has had this extension).

See Also

Details Tab

To Add a Field Name

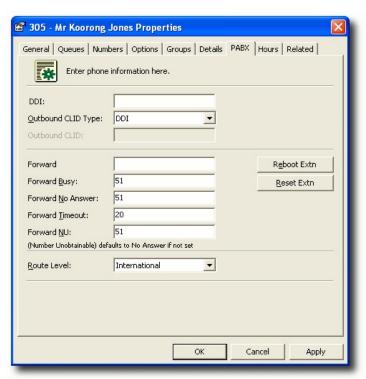
To Delete a Field Name

PABX Tab



PBX Dependent Feature!

IPFX allows a user to have PABX details within the extension.



This Feature	Does This
DDI/DID	Shows the DDI/DID connected to this extension number (greyed out for users)
	Displays the type of Outbound DDI Type. Select from the drop-down Menu. Available options are:: None: The PBX pilot number will be used for CLID presentation
Outbound CLID Type	DDI: The extension's DDI will be used for CLID if any. If not then defaults to "none".
	Other: The value of Outbound CLID field will be taken as CLID, If left empty reverts to "None".
	Restrict: CLID is withheld, i.e. called party will see no CLID.
Outbound CLID	This displays the CLID that the company is displaying when you make an outbound call.
Forward All	When a user's location is set to Forward All Calls To Voicemail, the 'forward all' selection is populated with the destination of the Voicemail Port.
Forward Busy	The 'forward busy' selection is always set to divert to the Voicemail Port.
Forward No Answer	The 'forward no answer' selection is always set to divert to the Voicemail Port.

Forward Timeout The 'forward timeout' selection is for adjusting how long the user's extension

rings before diverting to voicemail.

Forward NU Destination is unobtainable. When a caller phones your extension, if your

phone is unobtainable this setting advises where your callers go.

Reboot Extn This button is not visible to users.

This feature causes a full reload and will drop any calls that are in progress.

This button is not visible to users.

This feature is used to update the phone.

Route Level Select the Route Level from the drop-down Menu. (greyed out for Users)

Note The Forward Timeout selection must exceed the Queue Pullback timeout if the agent is in the queue, otherwise queue calls will not pull back from the queue, but deliver to the agent's voicemail.

See Also

Reset Extn

Add/Edit/Delete an

Extension

General Tab

Queues Tab

Numbers Tab

Options Tab

Groups Tab

Details Tab

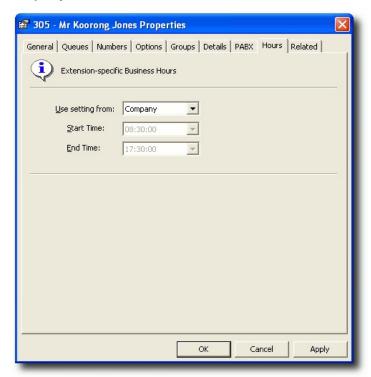
Hours

Related

Hours

Hours enables your location when set to 'Gone for the Day', 'On Holiday' or 'Sick Leave' to have a return time that is either the company default settings, or your individual settings. i.e. If your Department works different hours from the Company standard hours, you can select the appropriate times from the drop-down menus.

The Hours Tab displays the screen below.



This screen is used to set Extension-specific Business Hours.

To Change Settings

Use the drop-down menu to choose from the following options:

- Company (uses default hours)
- Department (inherits hours from department)
- Custom (allows you to set your own hours by using the drop-down menus for Start Time and End Time)

See Also

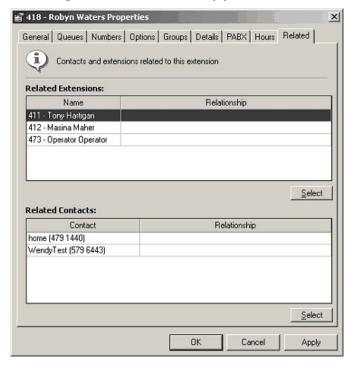
Add/Edit/Delete an Extension

General Tab
Queues Tab
Numbers Tab
Options Tab
Groups Tab
<u>Details Tab</u>
PABX Tab
Related

Related

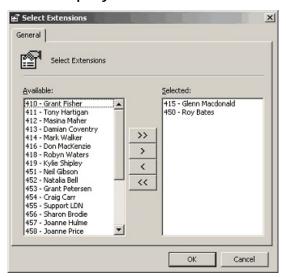
The Related Tab enables a user to detail any internal or external contacts that they wish to use for reference if they are not available to take a call.

These details will populate in the Insight feature when diverting a call to another user or the Operator. For further information, please refer to your User Manual for Viewing another users appointments.



Related Extensions

Click the **Select** button to display the **Select Extensions** screen.

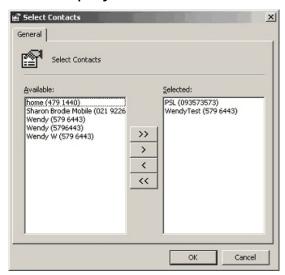


Use the Move buttons to Add/Remove extensions as required.

Click OK.

Related Contacts

Click the **Select** button to display the **Select Contacts** screen.



Use the Move buttons to Add/Remove Contacts as required.

Click OK.

Add/Edit/Delete an Extension General Tab Queues Tab Numbers Tab Options Tab Groups Tab Details Tab PABX Tab Hours

Features

Audio Text

See Also

<u>Features</u>

Call In Control

Call Pickup Groups

Directories (Company)

Document Routing

Fax Settings

Locations

Music on Hold

Speed Dials

User Level Features

Wrap-ups

IPFX Directory Sync

IPFX Softphone

Out of Office Assistant

SMS

Queue Callback

In This Section

What is a Message Box (Audio Text)?

Adding / Editing an Audio Text

Removing a Message Box (Audio Text)

Copying an Audio Text

What is a Message Box (Audio Text)?

Message Box (Audio Text) gives you the ability to program message boxes to play a greeting and perform different actions based on the caller's choice, the time of day and/or date.

These message boxes can be linked together to build simple or advanced menus.

How your PABX is programmed will determine whether incoming calls are routed to your Operator, to the Auto Attendant/Audio Text or both. All of these depend on Message Boxes to help the caller.

Many of the Audio Text messages will have been set up for you at the time of installation.

See Also

Audio Text

Adding / Editing an Audio Text

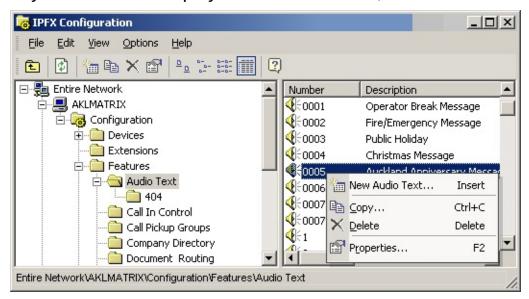
Removing a Message Box (Audio Text)

Copying an Audio Text

Adding / Editing an Audio Text

To Add or Edit an Audio Text

Open the **Features\Audio Text** subfolder and right-click on the right side of your screen to display the shortcut menu, i.e.



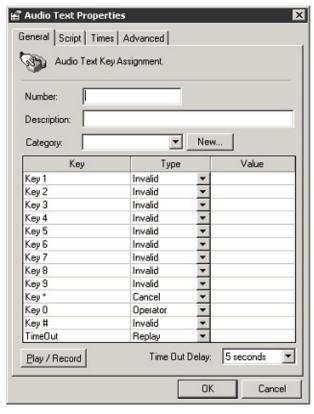
Select **New Audio Text** on the drop-down menu (or you can select New Audio Text from the File menu).

Note: If using categories, you can sort the Audio Text boxes into their categories by clicking on the 'Categories' column header.

To add a new Audio Text

Select New Audio Text from the short-cut menu, or Select New Audio Text from the File Menu.

The Audio Text Properties screen displays:



- Enter the New Audio Text number.
- Enter the description of the New Audio Text file.
- Select the Category Type from the drop-down menu, OR.
- Click the New.. button to create a new Category.
- Enter your Category Name on this screen.

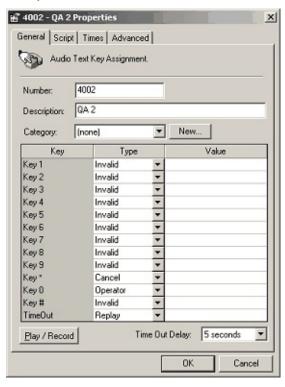
Note: A category enables you to group message boxes (Audio Text messages) for ease of locating. e.g. Holiday Messages, Emergency Messages.

- Click OK.
- Select the Type from the drop-down menu for the Key you select.
- Click in the Value field and enter the Value.
- **Time Out Delay**: Select the Time Out Delay from the drop- down menu.
- Click OK.

To edit an existing Audio Text

1. Double click on the required message. This displays the Audio Text

Properties form for the selected Audio Text.



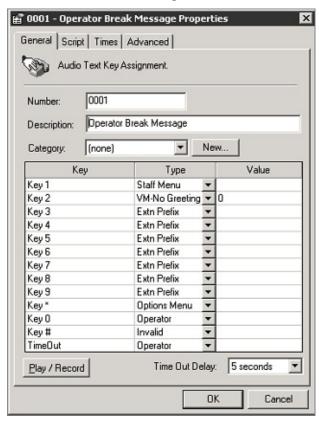
- 2. Make the changes required.
- 3. Click OK.



General Tab

The General Tab displays by default. It contains key assignment information.

This gives the caller the option of pressing different keys to obtain information, message boxes or staff.



A description of the fields is set out below.

Number

This is the Message Box number - this is a unique number. Numbers are used so message box messages can be identified and changed using the telephone. These are also used for mandatory Day and Night Menu Messages.

For ease of use, message box numbers are normally listed as the numbers you would press on the telephone to access them. Ie. 743.

If your company uses queue groups with announcements, then the message boxes created for announcements should start with the queue pilot number with an identifier prefix after. Ie. Queue Pilot = 410, Queue

Group Announcement Message Box = 4101 (this makes it easy to identify them).

When adding a new Message Box, it is good practice to follow this convention for the message box numbers.

Description

Allows you to name the Message Box to identify its use. eg: Nite Menu, Day Menu, Queue Announcements for Customer Services etc.

Category

This displays the category of the Audio Text file, so you can group Audio Text Boxes, eg: Holiday Messages, Emergency Messages, or Queue 401 so that all Queue Message Boxes are together in the file.

- Select a category from the drop-down menu, or Click on the New button to display the Description screen.
- Enter the new description.
- Click OK.

Note: A category can only be set up if there is an Audio Text Box associated with it. You cannot set up categories and add Audio text boxes later.

Note 2: The Day menu/Nite menu audio text boxes cannot be placed in a Category.

Key

This identifies the key to be pressed on the keypad of the phone by the caller to transfer to the appropriate box, staff member or feature. eg: Press one to dial an extension.

Type

This is the type of action which occurs when the user presses this menu button.

The possible types are:

Туре	Description

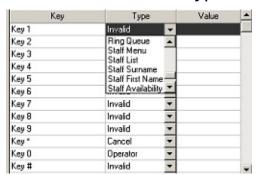
Invalid	Notifies caller that key pressed is invalid.
Callback	Allows the caller to press a key to request a callback.
	(see Callback module for further information)
Cancel	This will take the caller back one step.
Dial	Allows the caller to dial a specified number does not need a Voicemail mailbox for it to work. Also applies for dialling off site numbers.
	(Note Prefixes for outside numbers required)
Extn Transfer	Allows the caller to dial an extension and may announce where it is going 'Please hold while I transfer you to (Staff Name)'.
Extn Prefix	Informs the Voicemail that this is the first number of a valid extension.
Fax Back Extra	The fax package needs to be installed for this option to work.
Goodbye	Will say to the caller 'Thank you for calling, Goodbye'. Will terminate the call.
IVR	Integrated Voice Response. An additional module allowing the caller to enter their PIN or customer number.
	(Please contact voicemail vendor if further information is required).
Mailbox Access	Will ask the caller to enter a mailbox extension number.
Message Box	Transfers the caller to another message box specified where another set of options can be played.
Message List	Lists all message boxes Not recommended as this ties up ports.

Message Next	Allows the caller to go forward to the next message. May be used where there is a complexity of message boxes.
Message Previous	Allows the caller to go back to the previous message. May be used where there is a complexity of message boxes.
Message Prefix	If you give a DDI/DID for the customer to call then advise them to enter a number takes through a series of message boxes (Contact your Voicemail supplier for further information)
Message Admin	Allows the caller to change the Audio Text message remotely.
Night Service	Plays the Night Service Greeting to the caller.
Operator	Transfers the caller to the default Operator. (Key 0 is normally set to Operator).
Options Menu	Backs you out of the menu you are currently in, to an options menu.
Replay	Will replay the current Message Box greeting.
Return	Will return the caller to the previous greeting.
Ring Queue	In a queue announcement, the call will time out and then go back to the same position in the queue it came from.
3 (If there is a Dial or Extension number listed, this will cause the call to jump to the queue as a new call.
Staff Menu	Offers the caller the option of being transferred to an extension by entering the first three letters of either the first name or surname of staff to locate.
	(see Staff Surname, Staff First Name).
Staff List	Will offer the caller a list of all names and extensions of staff.

Staff Surname	This is a breakdown of the Staff Menu which offers the option of surname only by entering the first three letters.
Staff First Names	This is a breakdown of the Staff Menu which offers the option of First Names only by entering the first three letters.
Staff Availability	Will allow the caller to hear an extension's location not recommended as it ties up a port for a long time in a large organization.
Voicemail	Call will be sent to a specified mailbox and hear the mailbox greeting.
VM No Greeting	Call will be sent to a specified mailbox beep and will NOT hear the mailbox greeting.

Editing the Type Field

Double-click into the Type box next to the key you want to edit.



Select the new type option from the drop-down box.

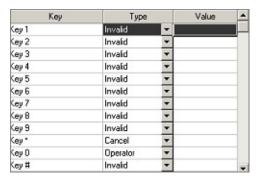
Value

This identifies where the caller is being redirected.

eg: 0 = Operator, DayMenu = Day Menu Message.

Editing the Value Field

Double click into the Value text box next to the key you want to edit.



Type in the value required. eg: 0 = Operator, 745 = Workshop.

Play/Record

Allows you to listen to or record the required message box. The system will phone your extension with an options menu to listen, re-record or cancel the message.

Time Out Delay

This is the time the system will wait for the caller to choose a given key/option before performing the specified Time Out Action.

Note: Check that the Key Timeout type is set to suit your requirements or change it as required. This is used when no key presses are heard by the CT Server.

See Also Adding / Editing an Audio Text Script Tab Times Tab Advanced Tab

Script Tab

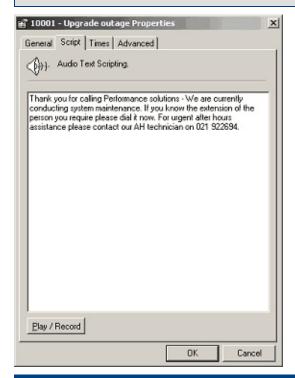
The script tab allows you to type the desired greeting script for the Message Box enabling you to refer back to it at any time.

Play/Record

Play/Record allows you to listen to or record the required greeting. The system will phone your extension with an options menu to listen, rerecord or cancel the message.

With the script message on your screen, you can record your message with accuracy.

Note: You must press Play/Record to record your message. IPFX will not automatically record the message based on your script.



See Also

Adding / Editing an Audio Text

General Tab

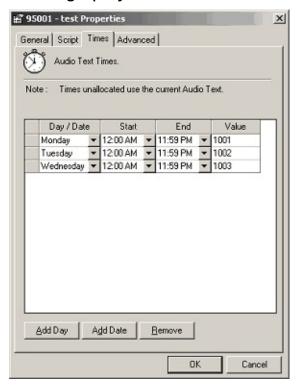
Times Tab

Advanced Tab

Times Tab

The **Times** Tab allows you to specify times during the day or particular dates when another message box may be used instead of the current settings.

e.g: the dates listed may be public holidays and you would like a different message played to that effect.



Adding a Day

This is useful if you want a message to play all the time, with the exception of for example, a Wednesday between 8.00am and 9.00am where it will play a special message. You can then add a day and time to reflect this.

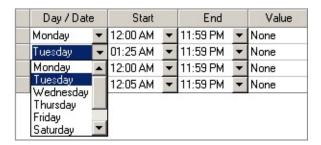
Click on the Add Day button.

The grid will automatically add a new line.

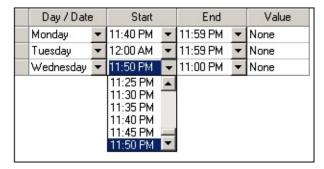


To add more days to the grid, continue to click the **Add Day** button.

To edit the Day, click on the drop-down box for the Day/Date field and select the new Day.



To edit the Start or End time, click on the drop-down box for the Start/End times and select the new times.



To edit the Value, click in the field and type the new value.

If you don't want to send the message to another message box or extension, leave the value as none.

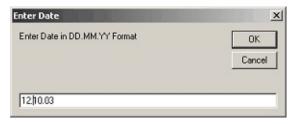
This will ensure that the current message box scripting values are adhered to.

Adding a Date

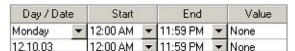
If the main company night message plays regularly, but you want the message to automatically change on a Public Holiday to play an appropriate message, you can programme the date to reflect this.

Click on the Add Date button.

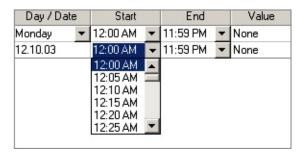
Enter the date in DD.MM.YY format on the popup form.



The date will then be added to the grid.



To edit the Start or End time, double-click in the field and select the new time.



To edit the Value, double-click in the field and type in the new value. If you don't want to send the message to another message box or extension, leave the value as none. This will ensure that the current message box scripting values are adhered to.

See Also

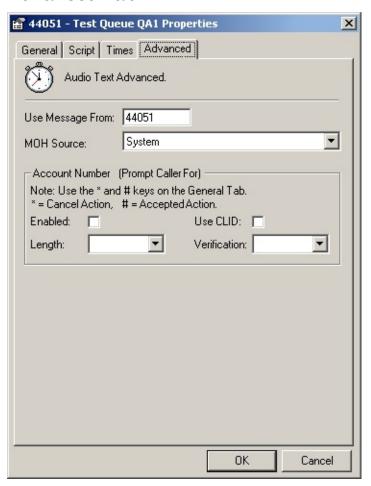
Adding / Editing an Audio Text

General Tab

Script Tab

Advanced Tab

Advanced Tab



The Advanced tab gives you options to set the Audio Text to a generic message. It also enables the caller to leave account information.

Use Message From

You can use a preset message and change the Audio Text to play it. It is also useful for queues where the same message plays in multiple queues.

MOH Source

Select the MOH source from the drop-down box.

Account Number

Callers can be asked to enter their account number so that the agent will know who is calling and can bring up their account information in their own administration packages. This can be much more accurate than just relying on Caller Line ID. Enabled whether this option is to be enabled for this message. Length length of account numbers required. (variable or 1 to 9) Use CLID Use the Caller Line ID to identify the caller.

Verification:

- None is where any value is accepted and it is sent through to the Screen Pop as an Account Number.
- Call Centre this is verified against the Company Directory listing within the IPFX software.
- External this is verified against an external Customer Database. This type of verification will require customized development and will need to be quoted separately based on a customer's Scope of Works.

If using the Message Box for IVR basic integration, the General Tab will require all keys set to 'invalid' with the exception of:

* Key = Ring Queue

Key = Ring Queue

0 Key = Operator

Timeout Key = Goodbye

See Also

Adding / Editing an Audio Text

General Tab

Script Tab

Times Tab

Removing a Message Box (Audio Text)

To remove a Message Box (Audio Text)

- 1. Right click on the Audio Text you want to remove and select the Delete option.
- 2. You will be prompted with a confirmation box:



2. Click **Yes** to remove or **No** to cancel.

See Also

Audio Text

What is a Message Box (Audio Text)?

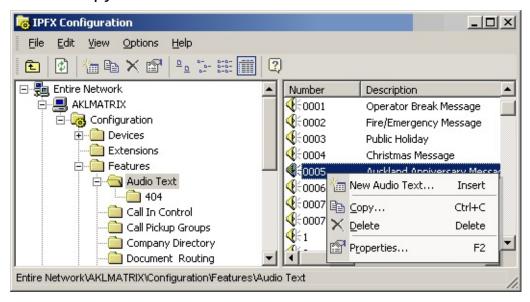
Adding / Editing an Audio Text

Copying an Audio Text

Copying an Audio Text

How to copy an existing Audio Text.

- Right click an existing Audio Text message to display the short cut menu.
- Select Copy.



- A complete copy of the selected Audio Text message displays.
- Click on the General tab.
- Enter the new number for the copied message.
- Enter a new **Description**.
- Select category from the drop-down menu, or Select New and create a new category.



• Click OK.

See Also

Audio Text

What is a Message Box (Audio Text)?

Adding / Editing an Audio Text

Removing a Message Box (Audio Text)

Call In Control

What is Call In Control?

Call In Control allows you to capture a call to an extension and/or PABX IDs and control where to direct the call. For example, you could send a call or calls to a Message Box where an Auto Attendant greeting can be played.

In Call In Control a number is configured on the PABX but you will need to set up the Call In Control in the IPFX Administrator Application so that when an agent dials the number (eg: 51), the Voicemail knows what to do with the call.

Your voicemail access code is a virtual extension, or on a CISCO Call Manager a CTI Route Point that has a Forward All to the Voicemail pilot. Because this access code is captured in Call In Control and is assigned with the instruction 'Mailbox Password', the voicemail system knows to ask you for your mailbox password.

Note: If you are unsure about changing any Call In Control features, please contact your PABX Technician they may need to make changes on the PABX.

See Also

Call In Control

Adding / Editing a Call In Control

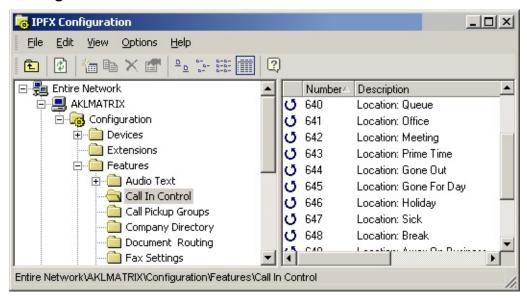
Deleting a Call In Control

Adding / Editing a Call In Control

To access Call In Control

- Click on the **Config** button on the top menu.
- Click on Features.
- Open the Call In Control folder.

The right side of the screen will now show the Call In Control Configuration numbers.



To create a new Call in Control

Right click in the right side of the screen to display the shortcut menu.

or

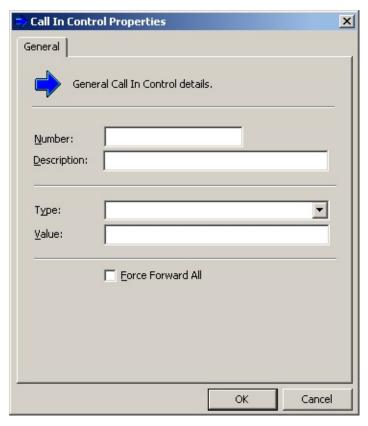
 Select New Call In Control from the File Menu on the IPFX Configuration Screen Toolbar.

Either of these actions will display the Shortcut Menu bar.



Select New Call in Control.

A blank Call in Control Properties screen displays.

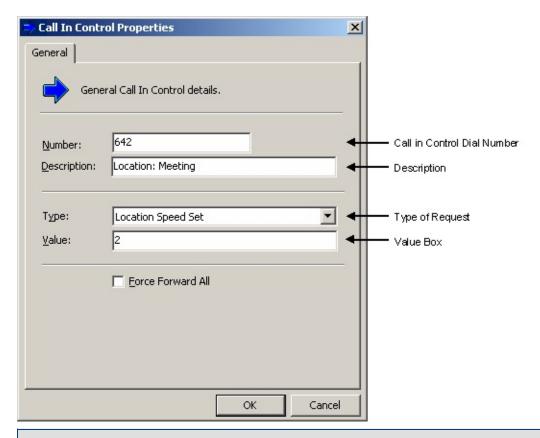


- 1. Enter the new Number in the Number field.
- 2. Enter the Description.
- 3. Select Type from the drop-down menu.
- 4. Enter the value.
- 5. Click OK.

To edit an existing Call In Control

Double click on an existing item.

This displays the Call in Control Properties screen.



Note: Any call that does not go to an extension or Queue Pilot which you want voicemail to handle, has to come via Call In Control. e.g. If you have a DDI you want to terminate on a message box, you need to forward it to a Virtual extension in the PABX.

This virtual extension will need to have a Forward All to the voicemail pilot.

At this point, the virtual extension can be entered into Call in Control and pointed to the message box.

A description of the fields for the above screen is set out below.

Number

The number or virtual number sent by the PABX to the voicemail to obtain the Call In Control feature.

Description

Allows you to name the Call In Control to identify its use.

i.e. Voicemail Access, Change Locations.

TypeWhat is required to happen when the Call In Control Number is dialed.

Туре	Description
Day Menu	Plays the Day Menu.
Night Menu	Plays the Night Menu.
Message Box	Sends caller directly to a message box.
Message Box Admin	Shortcut to Administration Menu.
Mailbox Password	Accesses your voicemail after prompting you to enter your password.
Mailbox No Password	Accesses your voicemail without entering a password.
Mailbox Previous Owner	Used for Hospitality package.
Transfer to Voicemail	Allows you to send a message to other extensions.
Location Speed Set	Allows you to change your locations.
Location Set Other	You can change your location from another desk. You will be prompted for your extension.
Dial by First Name	Allows you to dial a staff member by entering the first three digits of their first name.
Dial by Surname	Allows you to dial a staff member by entering the first three digits of their last name.
Find Person's Availability	You will be prompted for the person's extension and once entered, their location will be played back.
VM Listen to Call	Not currently used.
VM Retrieve Call	Not currently used.
Divert to Voicemail	Diverts to a specified persons voicemail.
Divert to Extension (Ring)	Will ring the extension number listed.
Divert to Extension (No Ring)	Will go straight to voicemail of the extension number listed.
Callback	Utilized by Call Centre. Allows caller to leave a voice message and be called back without losing their place in the queue. (You must have the Call Back module to enable this feature - for further information on setting up an agent to receive Callback, please refer to Queues\Agents.) To enable a Callback, please refer to your Reseller.
Wrapup Codes	Allows you to enter your wrapup code via the phone if you don't have a Dterm utilizing an OAI code.
Hot Desk	Allows you to log in / log out of Hot Desking.
IVR	Allows integration with a CRM package.

Value

This identifies where the caller is being redirected. Message Box = 400.

Force Forward All

Check this option if you want the Call In Control to automatically set a Forward All.

See Also

Call In Control

What is Call In Control?

Deleting a Call In Control

Deleting a Call In Control

To delete a Call In Control

1. Right click on the Call In Control you want to delete and select the **Delete** option.



You will be prompted with a confirmation box.

2. Click Yes to delete or No or Cancel to cancel.

See Also

Call In Control

What is Call In Control?

Adding / Editing a Call In Control

Call Pickup Groups

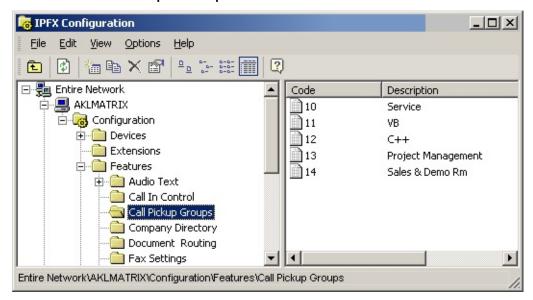


PBX Dependent Feature!

Call Pickup Groups enables you select the users you wish to be part of a Call Pick Up Group. Users can be part of multiple Pick Up Groups within IPFX.

To Set a Call Pickup Group

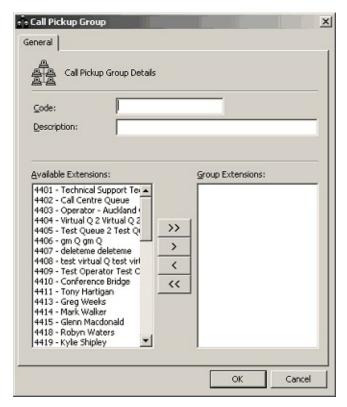
- 1. Select Configuration from the Toolbar.
- Select Features.
- 3. Select Call Pickup Groups.



4. Right click in the right hand side of the screen to display the short cut menu.



- 5. Select New Call Pickup Group.
- 6. The Call Pickup Group screen displays.



- 7. Select the extensions you wish to be part of the Call Pickup Group.
- 8. Click OK.

Note: Hold down the **Ctrl** key and select the extensions you need. Click the single move button (>).

Directories (Company)

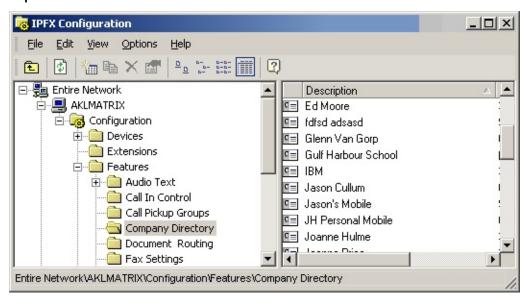
About Company Directories

This shows the Company Directory which each user has access to in IPFX.

Click on the **Config** button on the top menu.

Click on Features.

Open the Directories Folder.



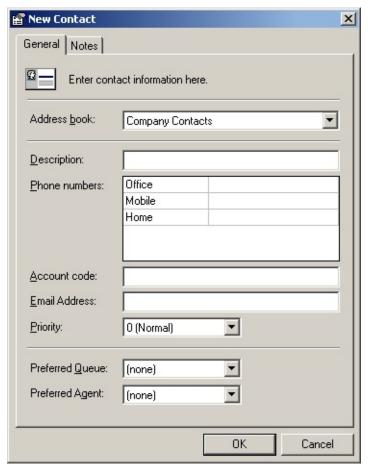
To Add a new Contact

1. Right click on the right side of the screen to display the shortcut menu.



Select New Contact.

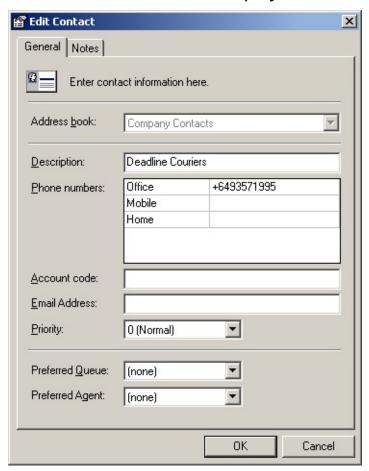
The New Contact screen displays The General Tab displays by default.



- 3. Select Company Contacts from the Address Book drop-down menu.
- 4. Enter Description.
- 5. Enter Phone Numbers.
- 6. Enter Account code.
- 7. Enter Email Address if required.
- 8. Select Priority from the drop-down menu, i.e. 1 being the highest and 9 being the lowest priority.
- 9. Select Preferred Queue from the drop-down menu (this feature only available if the IPFX Preferred Agent and Queue Routing module is purchased)
- 10. Select Preferred Agent from the drop-down menu (this feature only available if the IPFX Preferred Agent and Queue Routing module is purchased)
- 11. Click OK.

To edit an existing Company Directory item

- 1. Double click on the selected contact.
- 2. The Edit Contact screen displays.



- 3. Enter the new or altered contact information as required on this screen.
- 4. Alter any fields with drop-down boxes as required.
- 5. Press **OK** to finish.

For further information on Adding/Editing a Contact, please refer to the IPFX for Outlook, IPFX for Lotus Notes, IPFX Live Desktop or IPFX Live Toolbar User Guides.

For information on Preferred Agents, please refer to Preferred Agent Groups.

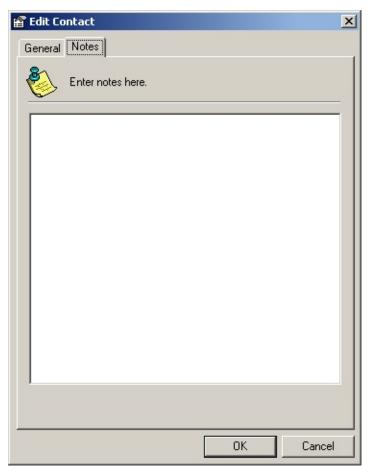
In This Section

See Also

Directories (Company)

Notes Tab

This screen enables you to enter relevant information about the Customer.



- Enter the notes in the screen.
- Click OK.

See Also

About Company Directories

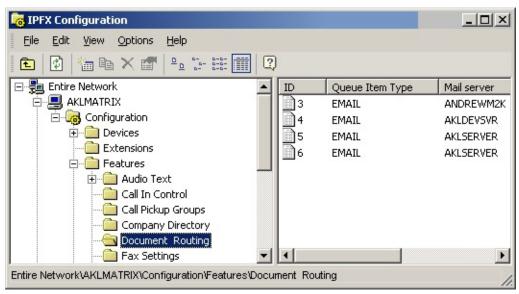
Document Routing

What is Document Routing?

A Document is either an e-mail or fax that has been received by a mail account on either a Microsoft Exchange or Lotus Notes mail server.

IPFX Document Routing allows Documents to be routed to Queues as a form of multimedia, along with normal phone call delivery to agents. Fax documents may additionally be routed directly to an e-mail address or to the e-mail address associated with a particular Extension.

For example: an organization will have an account set up on their Exchange or Lotus Notes Server to which all their support e-mails are sent by their customers. These e-mails can be automatically routed to a Queue where agents signed into that Queue can take them, in the same way they take a phone call.



See Also

Document Routing

Before Configuring Document Queuing

Configuring Document Queuing

Before Configuring Document Queuing

Before Document Queuing can be configured in IPFX:

- the Document Queuing Module installation program must be installed on the appropriate mail server,
- the Document Queuing Module configuration program must have been run on the mail server to configure the Document Queuing service,
- the Document Queuing Module must be running on the mail server.

If these steps have not been performed, you will be unable to configure Document Queuing.

Note: Please speak with your PBX Vendor (Reseller) to have this module installed.

See Also

Document Routing

What is Document Routing?

Configuring Document Queuing

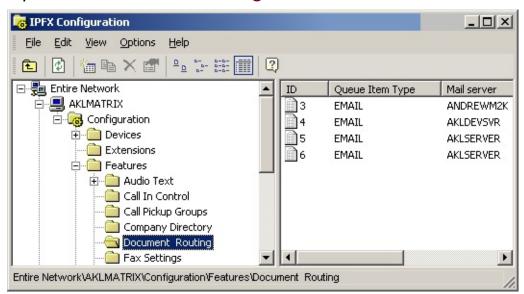
Configuring Document Queuing

IPFX Queuing checks the folders that have been publicized by the Document Queuing Service and routes the documents to the relevant Queues or addresses.

To do this you need to set up a Document Routing for each relevant publicized folder.

To access the Document Routing function

- Click on the Config button in the top menu bar.
 The IPFX Configuration screen displays.
- 2. Open the Features folder.
- 3. Open the **Document Routing** folder.

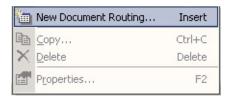


Your existing Document Routings are displayed in the right-hand pane. The columns display -

- the type of document being routed (FAX, EMAIL),
- which Mail Server received the document and
- in which publicized folder the document was found.

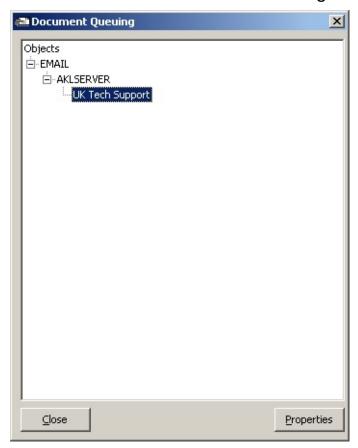
To create a new Document Route

1. Right-click on the right side of screen to display the shortcut menu:



2. Select New Document Routing.

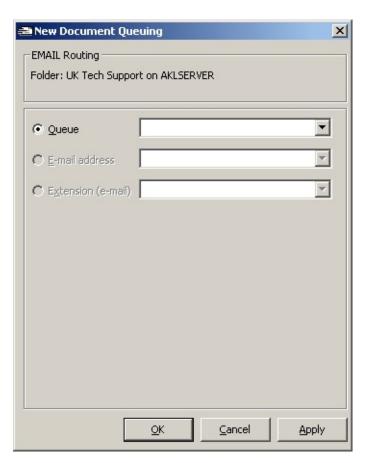
A complete list of all available publicized folders that DO NOT ALREADY have a Document Routing established will be displayed.



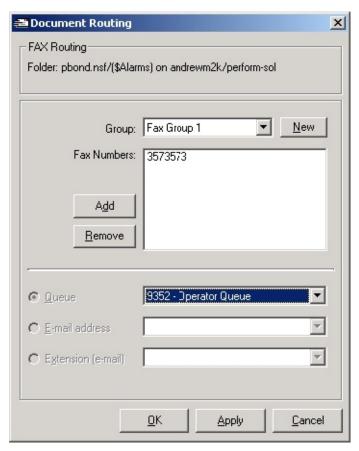
Note: This screen shows the type of document that may be received (EMAIL, FAX), then the mail server that will receive it, and finally the folders that the server is publicizing.

3. Select the relevant publicized folder and click **Properties**. The Document Routing details will be displayed.

An EMAIL Routing will display as follows:



A FAX Routing will display as follows:



Configuring an EMAIL Routing

- 1. From the Queue dropdown, select the Queue you wish to deliver the document to.
- 2. Click **OK** to close the dialog and save your changes.

Configuring a FAX Routing

- 1. To send the document to a Queue, select the Queue from the Queues dropdown.
- 2. To send the document directly to an e-mail address, select the address from the e-mail address dropdown.
- 3. To send the document directly to the e-mail address associated with an Extension, select the Extension from the Extension dropdown.
- 4. Click **OK** to close the dialog and save your changes.

To edit an existing Document Routing

 On the Configuration screen displayed above, double-click on the Document Routing you wish to edit. The Document Routing details will be displayed exactly as described above for creating a new Document Routing.

View or make changes and click **OK** to close the dialog box.

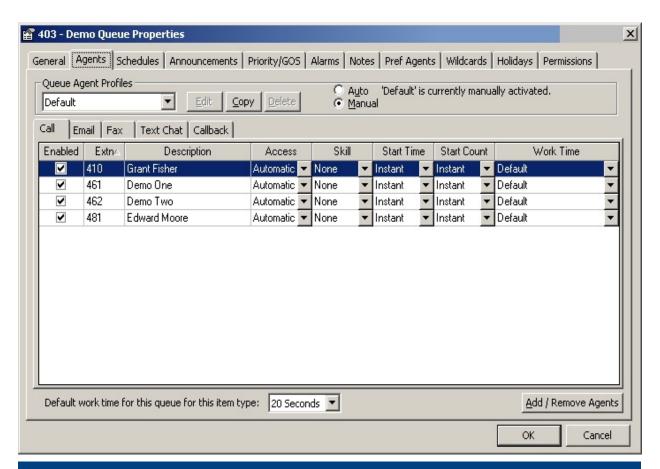
Note: You can have many publicized Folders set to route to a single Queue, eg: Support E-mails and Sales E-mails may all route to the Customer Services Queue 404.

Documents routed to a Queue are presented to Agents who are logged into the queue in the same way a normal phone call would be within the queuing environment.

When the agent within the queue is free, the document will deliver to them and the Accept/Decline Popup will appear. If the agent Declines or does nothing for a period of time, the document will return to the queue and deliver to another agent who is logged in.

If the agent accepts the document, the document is then delivered to the agent's Inbox who should respond accordingly.

To ensure your agents can receive documents you must enable access in the Queue/Agents Tab, shown below.



See Also

Document Routing

What is Document Routing?

Before Configuring Document Queuing

Fax Settings

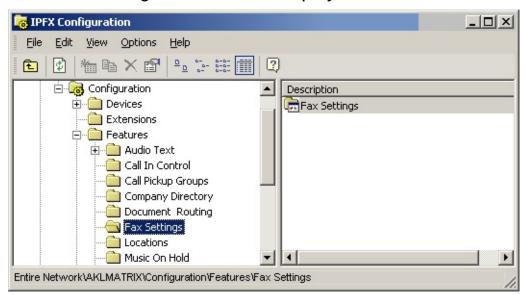
Setting which email accounts receive faxes

Pre-requisites

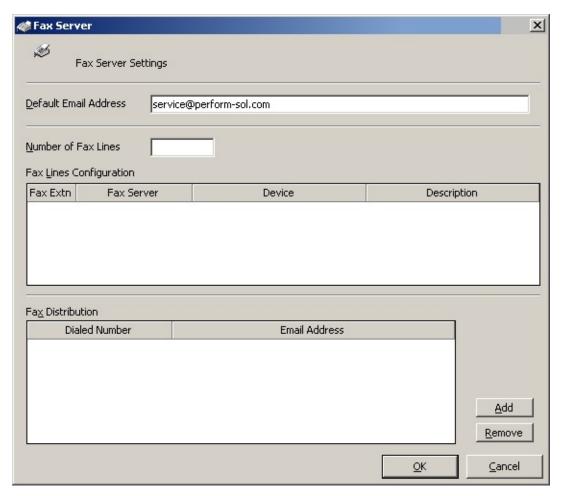
- A Windows 2003 Server License is required for the Fax Integration Module.
- The Fax Server must have the Document Queuing Module enabled to deliver incoming faxes and/or be able to use Fax Queuing.
- Please ensure that the Fax Server Module has been set up before starting the Client Configuration.

Follow the steps below to set which email accounts receive faxes:

- 1. Click on the **Config** button from your Main Toolbar.
- 2. The IPFX Configuration screen displays.



- 3. Select Features/Fax Settings.
- 4. The Fax Server Screen displays.



- 5. Check the details in the Default Email Address field are correct.
- 6. Enter the Number of Fax Lines.
- 7. Click OK.

To enable the extra fax line, click in the field and type in the required number.

This will only need to be changed when you add a new fax card or modem.

Fax Lines Configuration

Fax Extn field enter the number of the extension that the fax line is plugged into.

Fax Server - enter the name of the Fax Server or IP Address of the Fax Server.

Device enter the new Device from the drop-down menu.

Description - enter the fax line number.

Enter all the details of the new line and/or select 'Device' from the dropdown menu

Fax Distribution section

Click the 'Add' button to add a new line.

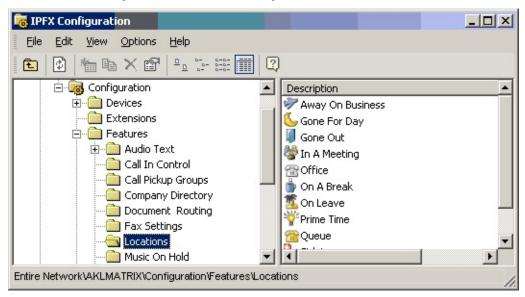
Dialled Number - Enter the company Fax Dialled Number as it is presented to us from the Router DNIS.

Email Address - Enter the email address for faxes to route to from the Dialled Number.

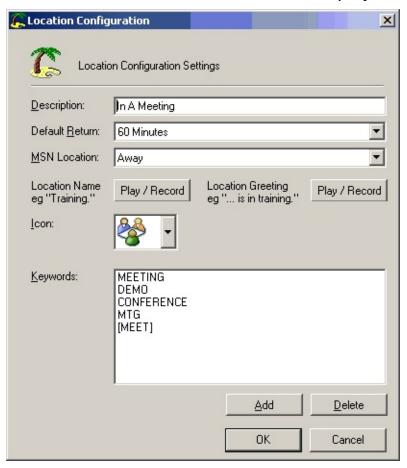
Note: If for Document Queuing module, the Email Address Field would be the public folder that the Document Queuing module is monitoring.

Locations

This enables you to customise your Location Icons and default times.



Double click on the selected item to display the **Properties** screen.



Description This can be changed if required.

Default Return This is the time the location will auto-return to the office location (based on user settings).

MSN Location This will ensure that MSN can be notified also if required.

Location Name and Location Greeting You can re-record a default name and greeting for the location if required.

Icon The icon can be changed if required.

Keywords These are the keywords that integrate with your IPFX for Outlook or IPFX for Lotus Notes client for calendar integration.

See Also

Features

Audio Text

Call In Control

Call Pickup Groups

Directories (Company)

Document Routing

Fax Settings

Music on Hold

Speed Dials

<u>User Level Features</u>

Wrap-ups

IPFX Directory Sync

IPFX Softphone

Out of Office Assistant

<u>SMS</u>

Queue Callback

Music on Hold



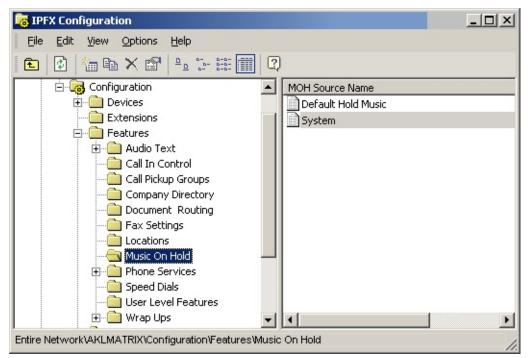
PBX Dependent Feature!

This feature provides Music on Hold to callers waiting in the queue and/or for callers who are put on hold by a user.

To configure Music on Hold

- Click on the Config button in the top menu bar.
 The IPFX Configuration screen displays.
- 2. Open the Features folder.
- 3. Open the Music on Hold folder.

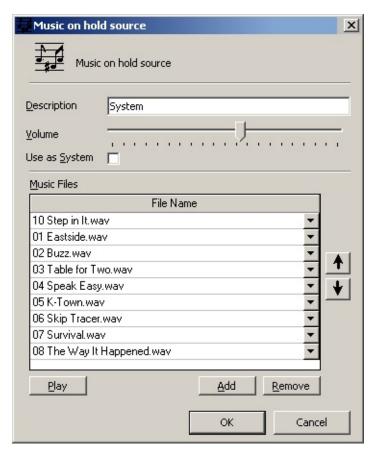
The screen below displays:



4. Double click on the right hand side of the screen to display the Music on Hold source file.

All Music on Hold files are stored in the VMLocal\Music Directory of the Server.

The Music On Hold Source File is shown below.

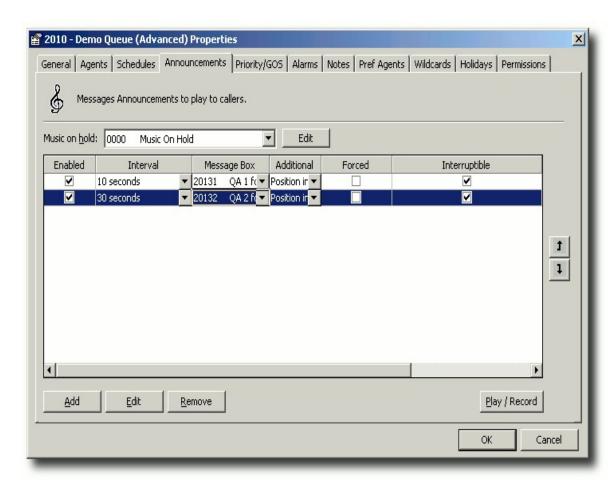


- 5. Click the **Add** button to add available files to this list.
- 6. Click the drop-down menu in the new line which appears.
- 7. Select the file of your choice.
- 8. To Remove files from this list -
 - Select the File to be removed.
 - Click the **Remove** button.
- 9. To play the MOH file, select a file name and click **Play**. Your phone will ring and then play the music for you. Hang up when finished.

Note: The order can be changed by using the drop-down menu boxes beside each file. Each file has the same menu.

To add Music on Hold files to a Queue -

- 1. Select the path Configuration/Queues/Queue Properties.
- 2. Select the Queue you wish to add a Music on Hold file to.
- 3. Select the Announcement Tab.



- 4. Select the **Edit** button.
- 5. The Music on Hold Properties screen appears:



- 6. Click on the **Advanced** tab.
- 7. Select the MOH Source previously set up.
- 8. Click OK.

Speed Dials



PBX Dependent Feature!

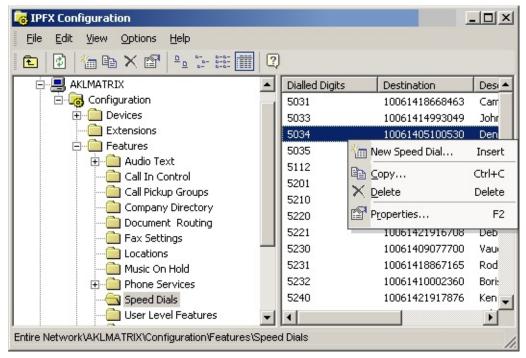
For IPFX Speed Dials, proceed as follows:

Speed Dials enable you to enter commonly dialed numbers into the IPFX system, to enable users to call outside numbers from a 3 or 4 digit code.

To Set a Speed Dial

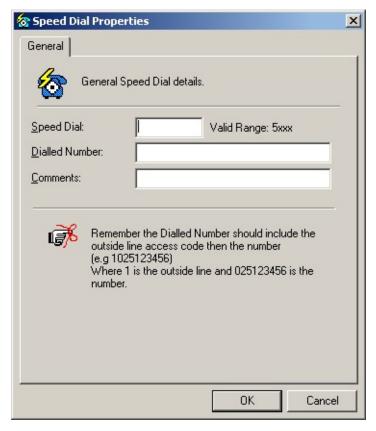
- Click on the Config button in the top menu bar.
 The IPFX Configuration screen displays.
- 2. Open the **Features** folder.
- 3. Open the **Speed Dials** folder.

The screen below displays:



4. Right click in the right hand side of the screen to display the short cut menu, (shown above) and select **New Speed Dial** from the context menu.

The screen below displays.



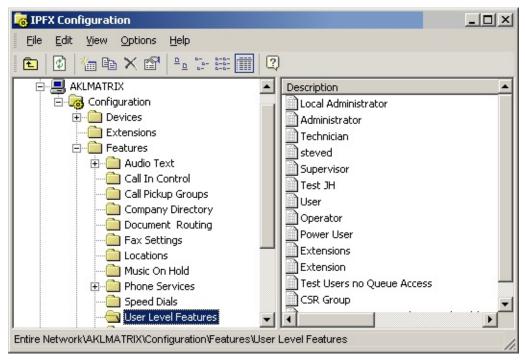
- 5. Enter the Speed Dial you wish to use.
- 6. Enter the Dialled Number, remembering to enter the outside line first, eg: 1
- 7. Enter the Description or Comments, eg: Company or person's name the speed dial is set for.
- 8. Click OK.

Note: Refer to the IPFX PBX Maintenance Interface (NEC MAT) guide for NEC Speed Dials

User Level Features

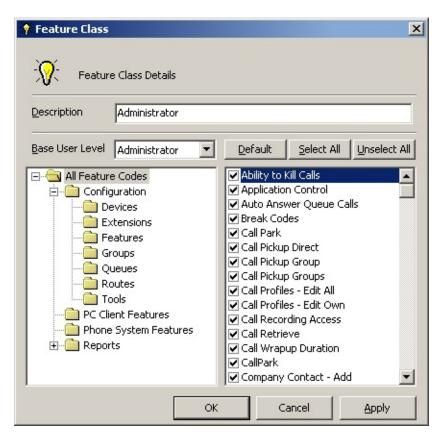
User Level Features allow the Technician to enable or disable various features for a particular class of users.

Click on the **Config** button to display the IPFX Configuration screen shown below.



Double click on the User Level that you wish to modify.

This displays the Features Class screen shown below.



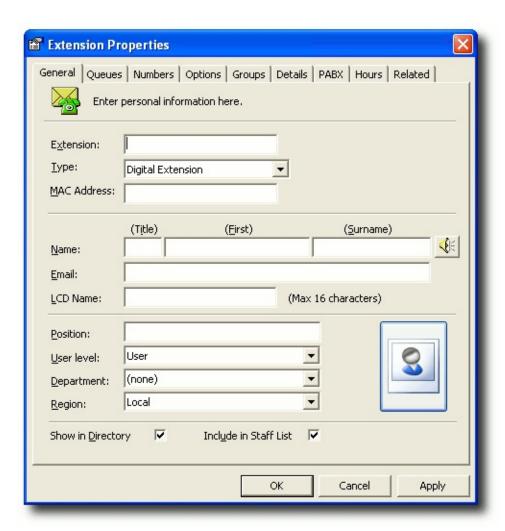
Check or uncheck the boxes beside the codes to select the features that you want to be available to users of the selected user level.

Click OK.

Each user level has a set of default features. Each higher user level will have access to all the default features of the lower levels. Therefore the highest user level will have access to all the default codes available to all the lower levels.

Extension Association

To apply these feature codes to a particular extension, you need to specify the extension's user level. This is done in the Extension Properties screen under the general tab:



Select the required **User level** for the extension from the drop-down menu.

Click OK.

This extension is now associated with the selected user level.

Note: For extension association, the default user level is User.

All currently available features are listed alphabetically below.

Description	PABX Type	User	Supervisor	Administrator
Ability to Kill Calls	ALL		Supervisor	Administrator
Application Control	ALL			Administrator
Auto Answer Queue Calls	ALL	User	Supervisor	Administrator
Break Codes	ALL	User	Supervisor	Administrator

Call Park	SIP	User	Supervisor	Administrator
Call Pickup Direct	SIP	User	Supervisor	Administrator
Call Pickup Group	SIP/NEC	User	Supervisor	Administrator
Call Pickup Groups	SIP/NEC	User	Supervisor	Administrator
Call Profiles - Edit All	ALL			Administrator
Call Profiles - Edit Own	ALL	User	Supervisor	Administrator
Call Recording Access	SIP			Administrator
Call Retrieve	SIP	User	Supervisor	Administrator
Call Wrapup Duration	ALL	User	Supervisor	Administrator
Company Contact - Add	ALL		Supervisor	Administrator
Company Contact - Delete	ALL		Supervisor	Administrator
Company Contact - Edit	ALL		Supervisor	Administrator
Company Contacts Access	ALL	User	Supervisor	Administrator
Company Directory In Config	ALL		Supervisor	Administrator
Config Icon	ALL		Supervisor	Administrator
Configure Call in Control	ALL			Administrator
Configure Contact Groups	ALL	User	Supervisor	Administrator
Configure Departments	ALL		Supervisor	Administrator
Configure Distribution Groups	ALL		Supervisor	Administrator
Configure Extension Directory	ALL	User	Supervisor	Administrator
Configure Fax Settings	ALL			Administrator
Configure Holidays	ALL		Supervisor	Administrator
Configure Queues	ALL		Supervisor	Administrator
Configure Wildcards	ALL	User	Supervisor	Administrator
Create Advanced Queues	ALL		Supervisor	Administrator
Directory Access	ALL	User	Supervisor	Administrator
Email Routing	ALL			Administrator
Edit Network Configuration	SIP	User	Supervisor	Administrator
Enable Insight	ALL	User	Supervisor	Administrator
Enable Picture Display	ALL	User	Supervisor	Administrator
Enable PS Chat	ALL	User	Supervisor	Administrator
Enable SMS	ALL	User	Supervisor	Administrator

Enable Video	SIP	User	Supervisor	Administrator
Extension - Create	ALL			Administrator
Extension - Delete	ALL			Administrator
Extension Change Route Levels	ALL	User	Supervisor	Administrator
Extension Details Edit All	ALL	User	Supervisor	Administrator
Extension Details Edit Own	ALL	User	Supervisor	Administrator
Extension Properties - Edit All	ALL			Administrator
Extension Properties - Edit Own	ALL	User	Supervisor	Administrator
Extension Short Cuts	ALL	User	Supervisor	Administrator
Feature Class	ALL			Administrator
Feature Server	SIP	User	Supervisor	Administrator
Forward All - Cancel	SIP	User	Supervisor	Administrator
Forward All - Set	SIP	User	Supervisor	Administrator
Forward Busy - Cancel	SIP	User	Supervisor	Administrator
Forward Busy - Set	SIP	User	Supervisor	Administrator
Forward Busy No Answer - Cancel	SIP	User	Supervisor	Administrator
Forward Busy No Answer - Set	SIP	User	Supervisor	Administrator
Forward No Answer - Cancel	SIP	User	Supervisor	Administrator
Forward No Answer - Set	SIP	User	Supervisor	Administrator
Hot Desk NEC Only	NEC			Administrator
Import Extensions	SIP			Administrator
Location Configuration	ALL	User	Supervisor	Administrator
Location Settings - Edit All	ALL			Administrator
Location Settings - Edit Own	ALL	User	Supervisor	Administrator
Locations - Edit All	ALL	User	Supervisor	Administrator
Locations - Edit Own	ALL	User	Supervisor	Administrator
MAT Equipment #	NEC	User	Supervisor	Administrator
MAT DDI	NEC			Administrator
MAT Forward options on PABX Tab	NEC	User	Supervisor	Administrator

MAT Hot Desking Initialise	NEC		Supervisor	Administrator
MAT LCD Name	NEC			Administrator
MAT Options	NEC			Administrator
MAT Other Extension Properties	NEC			Administrator
MAT Speed Dials	NEC			Administrator
MAT System Defaults	NEC		Supervisor	Administrator
MAT System Updates	NEC			Administrator
Message Boxes / Audio text	ALL		Supervisor	Administrator
Music on Hold	SIP			Administrator
Options Icon	ALL	User	Supervisor	Administrator
Out of Office Integration	ALL	User	Supervisor	Administrator
Personal Contact - Add	ALL	User	Supervisor	Administrator
Personal Contact - Delete	ALL	User	Supervisor	Administrator
Personal Contact - Edit	ALL	User	Supervisor	Administrator
Phone Administration Messages	SIP		Supervisor	Administrator
Phone Administration System	SIP			Administrator
Phone	SIP			Administrator
Phone Answer	ALL	User	Supervisor	Administrator
Phone Blind Transfer	ALL	User	Supervisor	Administrator
Phone Cancel Transfer	ALL	User	Supervisor	Administrator
Phone Complete Transfer	ALL	User	Supervisor	Administrator
Phone Conference	ALL	User	Supervisor	Administrator
Phone Dial	ALL	User	Supervisor	Administrator
Phone Hang up	ALL	User	Supervisor	Administrator
Phone Hold	ALL	User	Supervisor	Administrator
Phone Hold For	ALL	User	Supervisor	Administrator
Phone Intrude	SIP			Administrator
Phone Listen To Call In VM	ALL	User	Supervisor	Administrator
Phone Meetme Conference	ALL	User	Supervisor	Administrator
Phone Monitor	ALL			Administrator
Phone Pickup	ALL	User	Supervisor	Administrator

Phone Queue Hold	ALL	User	Supervisor	Administrator
Phone Record	ALL	User	Supervisor	Administrator
Phone Resume	ALL	User	Supervisor	Administrator
Phone Retrieve Call From VM	ALL	User	Supervisor	Administrator
Phone Send Call To VM	ALL	User	Supervisor	Administrator
Phone Service Queue Statistics	SIP	User	Supervisor	Administrator
Phone Service Team Directory	SIP	User	Supervisor	Administrator
Phone Services	SIP	User	Supervisor	Administrator
Phone Supervised Transfer	ALL	User	Supervisor	Administrator
Preferred Agent Groups	ALL		Supervisor	Administrator
Queue Access	ALL	User	Supervisor	Administrator
Queue Groups	ALL		Supervisor	Administrator
Queue Item Types	ALL			Administrator
Queue Routing (Queue Control ability is to forward queues to a destination in the clients and Console)	ALL	User	Supervisor	Administrator
Queues Agents Tab	ALL		Supervisor	Administrator
Queues Alarms Tab	ALL		Supervisor	Administrator
Queues Announcement Tab	ALL		Supervisor	Administrator
Queues General Tab	ALL		Supervisor	Administrator
Queues Holidays Tab	ALL		Supervisor	Administrator
Queues LCD Tab	ALL		Supervisor	Administrator
Queues Notes Tab	ALL		Supervisor	Administrator
Queue Permission Tab	ALL		Supervisor	Administrator
Queues Priority/GOS Tab	ALL		Supervisor	Administrator
Queues Schedules Tab	ALL		Supervisor	Administrator
Record Icon	ALL	User	Supervisor	Administrator
Regions	ALL			Administrator
Remote Access - Edit All	ALL			Administrator
Remote Access - Edit Own	ALL	User	Supervisor	Administrator
Reports - Agent Performance Summary	ALL		Supervisor	Administrator

Reports - Agent Performance Summary by Queue	ALL		Supervisor	Administrator
Reports - Audit Trial	ALL			Administrator
Reports - Call Pullback Report	ALL		Supervisor	Administrator
Reports - Call Transfer Summary	ALL		Supervisor	Administrator
Reports - Call Type by Extension Summary	ALL		Supervisor	Administrator
Reports - Callback Activity Report	ALL		Supervisor	Administrator
Reports - Cradle to Grave Report	ALL		Supervisor	Administrator
Reports - Daily Locations by Extension Summary	ALL		Supervisor	Administrator
Reports - DDI/DID Listing	ALL		Supervisor	Administrator
Reports - DDI Summary (Abandoned Calls)	ALL		Supervisor	Administrator
Reports - DDI Summary (Answered Calls)	ALL		Supervisor	Administrator
Reports - DDI Summary Report	ALL		Supervisor	Administrator
Reports - Extension by Queue Report	ALL		Supervisor	Administrator
Reports - Extension Configuration Report	ALL		Supervisor	Administrator
Reports - Extension Listing	ALL	User	Supervisor	Administrator
Reports - Incoming Calls Report	ALL		Supervisor	Administrator
Reports - Location by Extension Report	ALL		Supervisor	Administrator
Reports - Location by Extension Summary	ALL		Supervisor	Administrator
Reports - Location Summary	ALL		Supervisor	Administrator
Reports - Message Box Summary	ALL		Supervisor	Administrator
Reports - Outgoing Calls Report	ALL		Supervisor	Administrator
Reports - Overall Message Box Action Summary	ALL		Supervisor	Administrator

Reports - Overall Message Box Summary	ALL	Superviso	or Adminis	strator
Reports - Overall Queue Summary	ALL	Superviso	or Adminis	strator
Reports - Overall Wrapup Code Summary	ALL	Superviso	or Adminis	strator
Reports - Overall Wrapup Code Summary by Queue	ALL	Superviso	or Adminis	strator
Reports - PABX Logical Equipment Numbers	NEC	Superviso	or Adminis	strator
Reports - Virtual Equipment Numbers	NEC	Superviso	or Adminis	strator
Reports - Queue by Extension Report	ALL	Superviso	or Adminis	strator
Reports - Queue Call Type by Extension Report	ALL	Superviso	or Adminis	strator
Reports - Queue Call Type by Extension Summary	ALL	Superviso	or Adminis	strator
Reports - Queue Group Summary - 20 second intervals	ALL	Superviso	or Adminis	strator
Reports - Queue Group Summary - Overall Queue Summary	ALL	Superviso	or Adminis	strator
Reports - Queue Group Summary - Queue Summary	ALL	Superviso	or Adminis	strator
Reports - Queue Group Summary - Queue Summary by Day	ALL	Superviso	or Adminis	strator
Reports - Queue Summary	ALL	Superviso	or Adminis	strator
Reports - Queue Summary - 15 minute intervals	ALL	Superviso	or Adminis	strator
Reports - Queue Summary - 20 second intervals	ALL	Superviso	or Adminis	strator
Reports - Queue Summary - 30 minute intervals	ALL	Superviso	or Adminis	strator
Reports - Queue Summary by Day	ALL	Superviso	or Adminis	strator
Reports - Queue Summary by Hour	ALL	Superviso	or Adminis	strator
Reports - Speed Dial				

Listing	ALL	User	Supervisor	Administrator
Reports - Team Summary - 30 minute intervals	ALL		Supervisor	Administrator
Reports - Team Summary - Agent Performance	ALL		Supervisor	Administrator
Reports - Team Summary - Extension by Queue Report	ALL		Supervisor	Administrator
Reports - Team Summary - Queue Call Type by Extension	ALL		Supervisor	Administrator
Reports - Team Summary - Wrapup Code Summary	ALL		Supervisor	Administrator
Reports - Team Summary - Wrapup Codes by Queue	ALL		Supervisor	Administrator
Reports - Total Call Activity Report	ALL		Supervisor	Administrator
Reports - Total Message Box Activity Report	ALL		Supervisor	Administrator
Reports Virtual Queue Summary	ALL		Supervisor	Administrator
Reports - Wildcard/Preferred Agent Group by Queue Report	ALL		Supervisor	Administrator
Reports - Wildcard/Preferred Agent Group Report	ALL		Supervisor	Administrator
Reports - Wrapup Code Listing by Folder	ALL		Supervisor	Administrator
Reports Wrapup Report	ALL			Administrator
Reports - Wrapup Codes by Queue Report	ALL		Supervisor	Administrator
Reports	ALL	User	Supervisor	Administrator
Reports Networking	ALL			Administrator
Router/Gateway	SIP			Administrator
Routes	ALL			Administrator
Routes Outbound (LCR)	ALL			Administrator
Server Inter Site Networking	ALL			Administrator
Servers Settings	ALL			Administrator
SIP DDI	SIP	User	Supervisor	Administrator
SIP Speed Dials	SIP	User	Supervisor	Administrator

Switch	SIP			Administrator
System Speed Dials Bypass Extension Toll Bars	SIP	User	Supervisor	Administrator
Text Chat Scrips	ALL	User	Supervisor	Administrator
Teams	ALL		Supervisor	Administrator
Trace	ALL			Administrator
Trunks	NEC/SIP			Administrator
Versioning	ALL	User	Supervisor	Administrator
View Pending Appointments	ALL	User	Supervisor	Administrator
Work Time	ALL	User	Supervisor	Administrator
Wrapup Codes	ALL		Supervisor	Administrator
Wrapup Folders	ALL		Supervisor	Administrator

Wrap-ups

Wrap-up Codes

Wrap-up codes are codes that categorise each call for reporting and business analysis. For every call that comes into a call centre, the agent can select the correct wrapup code that best describes the nature of the call.

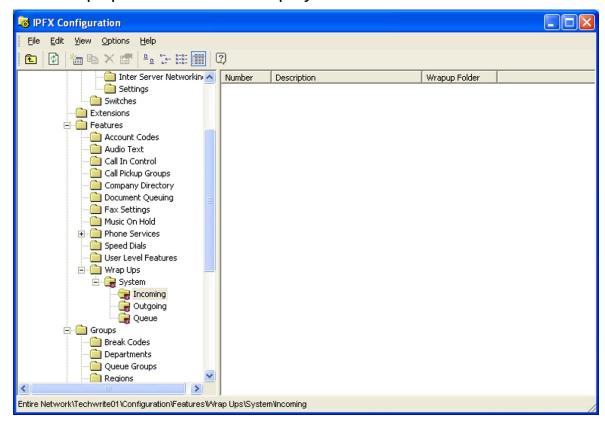
Wrap-up Codes can be 'forced on' so that each agent must select a wrap-up code or codes before the next call can be answered.

In This Section	See Also	
Adding / Editing a WrapUp Code	Wrap-ups	
Deleting a Wrapup Code	Wrapup Folders	

Adding / Editing a WrapUp Code

To access the WrapUp Codes feature

- 1. Click on the Config button in the top tool bar.
- 2. Click on the Features folder.
- 3. Click on the WrapUps folder.
- 4. The WrapUp Codes Screen displays.



The right side of the screen will display the WrapUp Codes already configured. WrapUps are sorted into sub-folders for your convenience.

Fields available on the WrapUp Code Properties screen



Number

The Number assigned to the WrapUp Code. This is useful for Phone Functionality (where agents do not have IPFX Manager or IPFX Mail Manager Popup Screens).

The default WrapUp code length is 2 digits.

If additional digits are required, please contact your voicemail vendor.

Description

Use a description that matches the desired outcome of the call.

Note: If a DDI/DID call comes to an extension, or a call has been transferred to an extension, the WrapUp code pop-up window may be minimized to the system tray. It is still active. To bring the pop-up window, double-click the icon in the system tray in the lower-right corner of the screen. (To avoid this, WrapUp codes need to be forced on incoming and outbound calls.)

A WrapUp code may also be entered during the call.

To add a new WrapUp Code

1. Right-click on the right side of the screen to show the short-cut menu.



- 2. Select New WrapUp Code from the short cut menu; or
- 3. Select New WrapUp Code from the File Menu on the IPFX Configuration Screen. A blank WrapUp code Properties form will appear.
- 4. Enter details in Number and Description fields.
- 5. Select WrapUp Folder from the drop-down menu.
- 6. Click OK.

To edit a WrapUp Code

- 1. Double click on the required WrapUp Code. The populated WrapUp Code Properties Screen appears for the selection.
- 2. Edit as required.
- 3. Click OK.

See Also

Wrap-up Codes

Deleting a Wrapup Code

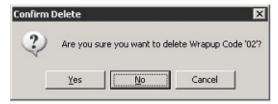
Deleting a Wrapup Code

To Delete a Wrapup Code

- 1. Select the Wrapup Code you want to delete and right-click to display the popup menu.
- 2. Select Delete.



3. You will be prompted with a confirmation box.



4. Click Yes to remove or No or Cancel to cancel.

If a wrapup *folder* is deleted, ALL wrapup codes allocated to that folder will also be deleted.

Note: If a IPFX Contact Centre agent takes a call and transfers it, the cal becomes an "incoming" call. If it is a requirement for the originating party and the person who took the transferred call to wrap up, then set wrapups on for "incoming" calls in the extension properties.

See Also

Wrap-up Codes

Adding / Editing a WrapUp Code

Wrapup Folders

Wrapup Folders allow you to organize Wrapups into convenient categories.

For example, if you are taking a call for a Customer Service Queue, you only want to see the Wrapup codes relevant to that Customer Services Queue, not all Wrapups for the company.

To Create a new Wrapup Folder.

1. Right click in the right side of the screen to display the short cut menu, shown below.



2. Select New Wrapup Folder, to display the Folder Properties screen.



- 3. Enter the key name (e.g. CUS).
- 4. Enter the description (e.g. Customer Services).
- Select the Parent Folder.
 (If this is a folder for a queue, it is suggested you use the Parent Folder Queues for convenience).
- 6. Click OK.

To edit an existing Wrapup Folder-

1. Double click on your selection on the right side of the screen. The screen below displays.



- 2. Make amendments as required.
- 3. Ensure you have entered the Folder you require in the Queue Properties for this to activate.

Note: If you are creating Wrapup folders for Queues, you should ensure that the Parent Folder is Queue.

See Also

Wrap-ups

Wrap-up Codes

IPFX Directory Sync

This feature only available if an *IPFX Directory Sync* module is purchased.

IPFX Softphone

This feature only available if an *IPFX Director Softphone* module is purchased.

See Also

Features

Audio Text

Call In Control

Call Pickup Groups

Directories (Company)

Document Routing

Fax Settings

Locations

Music on Hold

Speed Dials

<u>User Level Features</u>

Wrap-ups

IPFX Directory Sync

Out of Office Assistant

SMS

Queue Callback

Out of Office Assistant

This feature only available if *IPFX MS Exchange Out of Office Assistant Integration* and *IPFX Document Queuing - Email and Fax* modules are purchased.

See Also

Features

Audio Text

Call In Control

Call Pickup Groups

Directories (Company)

Document Routing

Fax Settings

Locations

Music on Hold

Speed Dials

User Level Features

Wrap-ups

IPFX Directory Sync

IPFX Softphone

SMS

Queue Callback

SMS

This feature only available if *IPFX SMS Server* and *IPFX Document Queuing - Email and Fax* modules are purchased.

See Also

Features

Audio Text

Call In Control

Call Pickup Groups

Directories (Company)

Document Routing

Fax Settings

Locations

Music on Hold

Speed Dials

<u>User Level Features</u>

Wrap-ups

IPFX Directory Sync

IPFX Softphone

Out of Office Assistant

Queue Callback

Queue Callback

This feature is only available if the IPFX Queue Callback module has been purchased.

Queue Callback gives callers the option to leave a Callback message in a Queue. The Callback message will continue to queue for agents just like a physical call would do. When delivered, the agent can automatically accept the Callback message and the system will phone the customer back.

If the customer is not available when the agent returns their call, the agent can reschedule the callback to another time or date. Rescheduling hides the Callback from view and causes the Callback to repopulate the queue at the specified time. The rescheduled Callback then deliver to agents as specified by the Supervisor/Administrators.

Configuring Callbacks

Set the Call in Control for Callbacks

- 1. Open IPFX Configuration.
- 2. Click on Config > Features > Call In Control.
- 3. Create a Call In Control number with the destination set to Callback. (Recommended number for Callback is x6 where x is the prefix for voicemail commands i.e. 51, 52, 53)

To Enable your Agents to Reschedule Callbacks

Callbacks can be rescheduled in two ways: from the your Client's Screen Pop or via the Phone itself.

- To Reschedule your Callback via the Phone, first dial the appropriate wrap-up code, then dial 99 (the default code for Rescheduling Callbacks).
 - When this code is entered, the message will be rescheduled for the Default Reschedule Time. If the user continues to enter digits after the 99 code, these digits will be interpreted as a wait time according to following format: 99HHMM, where HH is the number of hours and MM the number of minutes to wait.
- To Reschedule your Callback via the Screen Pop, please select the relevant options from your Screen Pop as per your User Manual -'How a Callback Presents itself to an Agent'.

Set a Wrap Up Code that applies the Callback

By default, Callbacks have a forced Wrap Up Code. If you do not wish to force wrap up codes for Callbacks, then please ensure you turn this off. Please refer to Queue Item Types for further information.

See Also

Queue Callback

Ensuring Your Queue is Set Up to Receive Callbacks

Ensuring Your Queue is Set Up to Receive Callbacks

Callback is enabled on an individual queue in two ways:

- 1. Set up the Queue > Agents Tab to enable agents to receive Callbacks. Refer to <u>Adding an Agent to the Queue</u>.
- 2. Set up the Queue Announcement to allow the customer to press an option for the Callback (Audio Text).

See Also

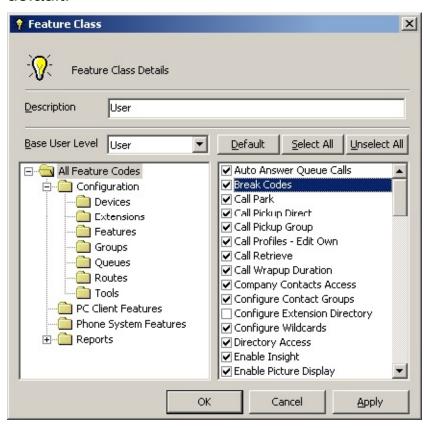
Queue Callback

Configuring Callbacks

Groups

Break Codes

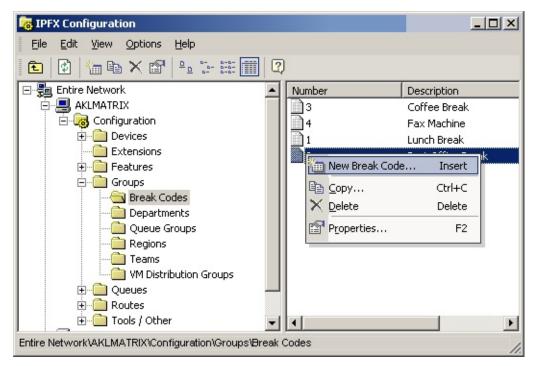
For Break Codes to operate, firstly you must ensure that your User Feature Level option for Break Codes is set - this is NOT turned on by default.



For further information on Feature Class Details, please refer to User Level Features.

To Add Break Codes

- Select IPFX Configuration\Groups\Break Codes.
- Right click in the right hand details screen and select New Break Code.



- Add the Unique Number in sequence to the Break Codes (this is made up by you, not generically provided).
- Add Description that you wish to display in the Location\Break dropdown menu.



Select OK.

To Edit Break Codes

- Select IPFX Configuration\Groups\Break Codes.
- Either double click on the required Break code, or right click and select properties.
- Make appropriate changes.
- Select OK.

To Delete Break Codes

- Select IPFX Configuration > Groups > Break Codes.
- Right click on the break code you wish to delete.
- Select Delete.
- Select **OK**.

To Copy Break Codes

- Select IPFX > Configuration > Groups > Break Codes.
- Right click on the break code you wish to copy.
- Select Copy.
- A new Break Code Form will display for you to change/update.
- Select OK.

Note: Break Codes can be reported on, they display in the Queue and Directory views.

See Also

Groups

Departments

Queue Groups

Regions

Teams

Voicemail Distribution Groups

Departments

In This Section

What are Departments?

Adding / Editing Departments

Partitions

See Also

<u>Groups</u>

Break Codes

Queue Groups

Regions

<u>Teams</u>

<u>Voicemail Distribution</u>

<u>Groups</u>

What are Departments?

Departments are users grouped together to match your company structure. Ie. Marketing, Engineering.

By setting departments, you can allow messages to be easily sent to a department, or you can sort the directory based on departments to assist you sending your caller to the right collection of people.

These groups can be allocated a number from 000 to 999.

Each user can only belong to one department and if entered into another group, they will be taken out of the original department.

Only a supervisor/administrator can set up Departments. All staff can utilise them.

See Also

<u>Departments</u>

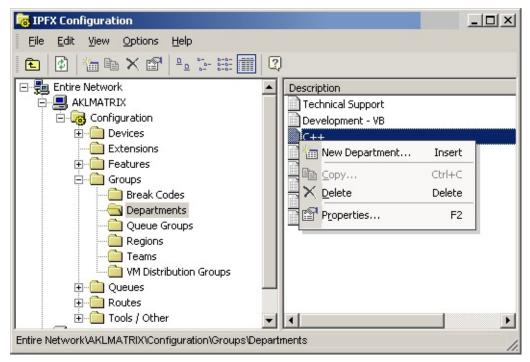
Adding / Editing Departments

Partitions

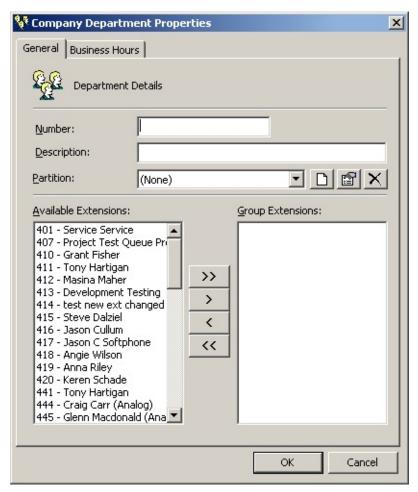
Adding / Editing Departments

To Add a New Department

- 1. Click on the Config button.
- 2. The IPFX Configuration Screen displays.
- 3. Open the **Groups** folder.
- 4. Open the **Departments** folder. The right side of the screen will now display the Department information.



- 5. Right click on the right side of the screen to display the Short Cut Menu. (as shown above).
- 6. Select New Department..from the shortcut menu. The Properties screen below displays.

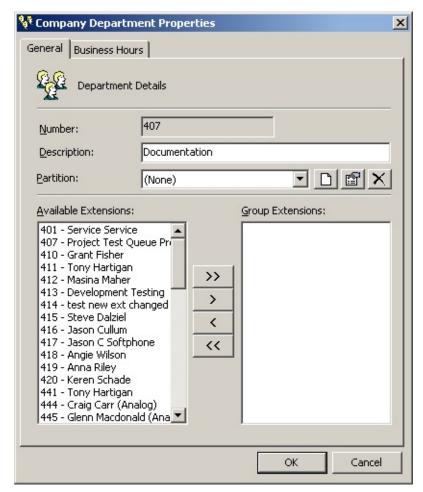


- 7. Enter new Group Number.
- 8. Enter new Description.
- 9. Select Available Extensions and move to and from Group using the arrow buttons.
- 10. Select the appropriate partition.
- 11. Click OK to finish.

To Edit an Existing Department

1. Double click on the selected Department.

The Company Department Properties screen displays.



- 2. Make required changes using the < > (Move) buttons.
- 3. Click OK.

Set out below is a description of the screen fields.

Number

This is the unique department number.

It must be a three-digit number between 000 and 049.

Description

The description should match the department name. Ie. Cafeteria, Service, Marketing, Sales.

Available Extensions

This shows all available extensions in your company that are available to be put into a department.

Group Extensions

This includes all the extensions that you want in the Department.

In This Section	See Also
Adding Multiple Names	<u>Departments</u>
Business hours tab	What are Departments?
Removing a Department	<u>Partitions</u>

Adding Multiple Names

To add more than one name at a time, hold the CTRL key down and then click the names you require.

When you have selected all required names, you can move them using the single Move button .

Note: When you have added a user to a department, the department name will populate in the extension properties of that user.

Move Buttons

- >> Move all names from Available Extensions to Group Extensions.
- Move one name at a time from Available Extensions to Group Extensions.
- Remove one name at a time from Group Extensions.
- Remove all names from Group Extensions.

See Also

Adding / Editing Departments

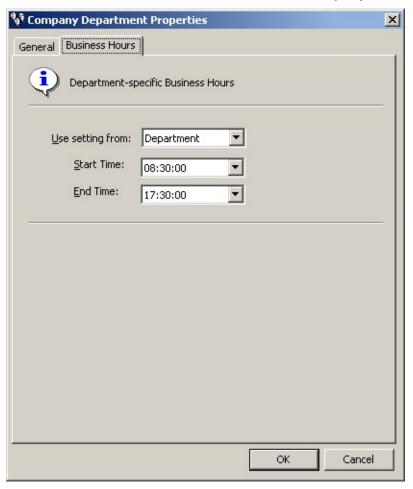
Business hours tab

Removing a Department

Business hours tab

Business Hours enables your location when set to 'Gone for the Day', 'On Holiday' or 'Sick Leave' to have a return time that is either the company default settings, or you can change these for your individual settings if your Department works different hours, eg: Office staff start at 8:30am, whereas the Technical team start at 7:00am.

1. Click on the Business Hours Tab to display the screen below.



- 2. Use the drop-down menus to alter Start and End Times if required.
- 3. Click OK.

See Also

Adding / Editing Departments

Adding Multiple Names

Removing a Department

Removing a Department

Right click on the Department that you want to delete and select the **Delete** option.

You will be prompted with a confirmation box.

Click Yes to delete or No to cancel.

See Also

Adding / Editing Departments

Adding Multiple Names

Business hours tab

Partitions



PBX Dependent Feature!

Partitions enable you to segment extensions into groups that can only be viewed by specific people within your organisation.

To do this, a department can be assigned to a partition. All extensions within that department are also part of that partition.

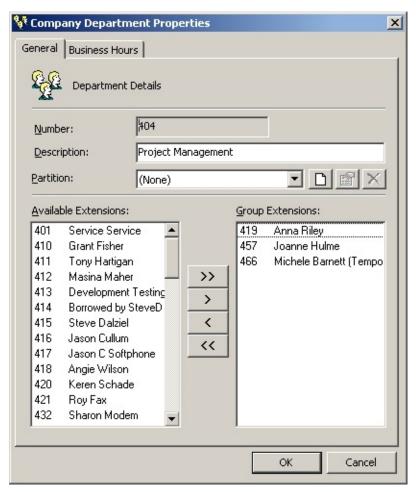
- Partitions when created are applied to the Client in the following areas:
- Send a Message
- Directory
- Adding Queue Agents to the Queue Properties

Note: Partitions only apply to Extensions, not Queue Views or Reports these are handled by Queue Permissions with a similar philosophy. For further information please refer to <u>Queue Permissions</u>.

To Create a Partition

Go to Configuration\Groups\Departments from your Client Toolbar.

Right click and select properties (or double click) to access the Department details, i.e.



Select the 'New Partition' Icon to the right hand side of the Partition field, i.e.

Enter your new Partition Name:

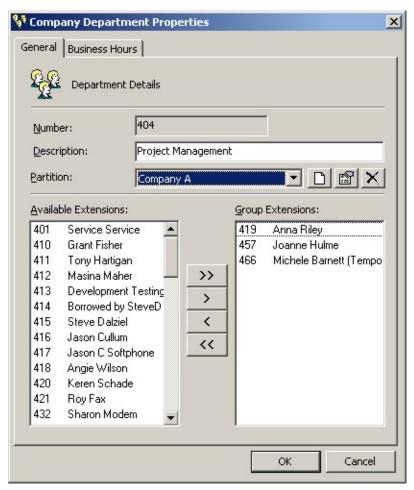


Select OK.

To Create Restrictions on Partitions

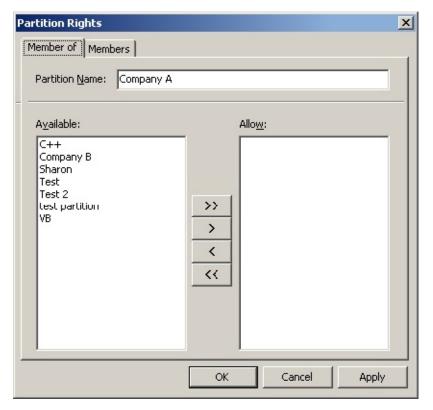
Select the drop-down menu of existing Partitions.

Select the Partition you wish to edit or create restrictions on, i.e. Company A (below):



Click on the Edit icon, i.e.

You will see two tabs on the following screen, one for 'Member of' and one for 'Members':



'Member of'

This tab shows which other partitions this partition is allowed to access.

Available this shows what Partitions are available system wide.

Allow this shows what Partitions this Partition has access to.

'Members'

This tab shows which other partitions have access to this partition.

Available this shows what Partitions are available system wide.

Allow this shows what Partitions have access to his Partition.

Select the Partitions you wish to view and use the arrow buttons to move accordingly.

Select **Apply**.

Select **OK** when complete.

Points To Be Aware Of:

Under Config\Extensions the extensions list is not limited by partition. This is because only Administrators have access to this functionality and

it is imperative that duplicate extensions are not created, which could be a possibility if an Administrator does not have the ability to view all extensions.

If a Department is not in a Partition, then everyone will be able to view the extensions that are part of the Department.

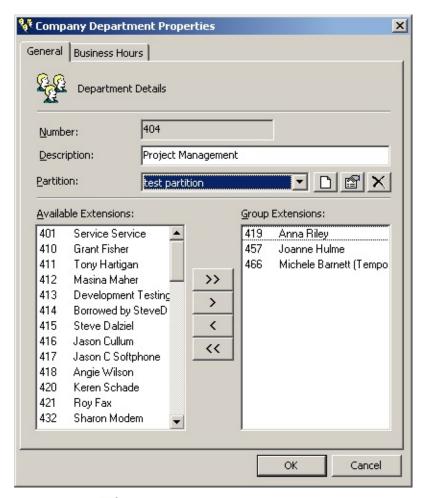
If an extension is not in a Department, then everyone will be able to view the extension.

If an extension that is not in a Partition logs onto a Client it will only see other extensions that are not in a Partition. This is for security reasons, to ensure that extensions that are not part of a Partition do not have access to extensions they are not supposed to view.

Example: A lunchroom extension does not need to see Partitioned extensions, but should be able to view similar extensions; for example a fax extension that is also not in a partition. Staff logging on to a Client in the lunchroom are not able to view all extensions, as some are sequestered in partitions. The partitioned extensions can view open extensions (like the fax or the lunchroom) and the extensions within their partition.

To Delete a Partition

Select the Partition you wish to delete from the drop down menu for Partitions.



Click the icon. You will be asked to verify the delete command, select Yes.

The Partition will be deleted.

See Also

Departments

What are Departments?

Adding / Editing Departments

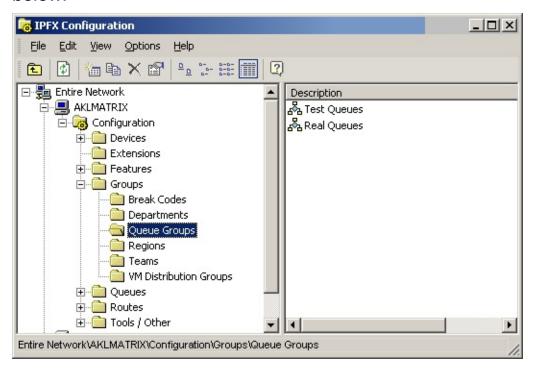
Queue Groups

What is a Queue Group?

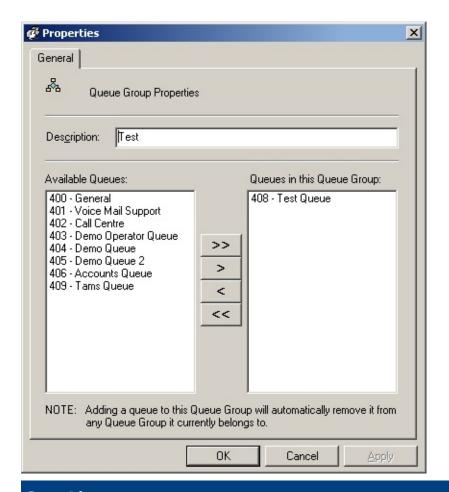
Note: This feature only available if an IPFX Contact Centre module is purchased.

A Queue group lets you place a number of queues into one group. This will allow reports to show a group of Queues instead of just one. You may want to set up Queue Groups to show comparisons between different queues.

Use the path Configuration\Groups\Queue Groups to display the screen below:



An example of a Queue Groups Properties Screen is shown below:



See Also

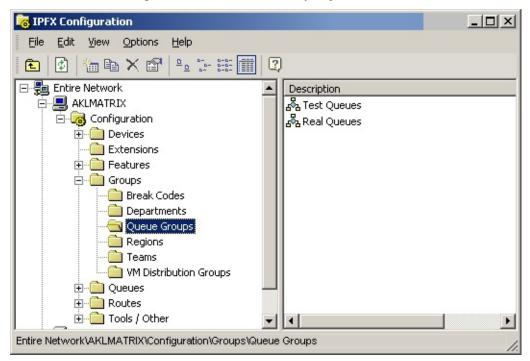
Queue Groups

Adding / Editing a Queue Group

Deleting a Queue Group

Adding / Editing a Queue Group

- 1. Click on the Config. Button on the top menu bar.
- 2. Open the Groups Folder.
- 3. Open the Queue Groups folder.
- 4. The IPFX Configuration screen displays.

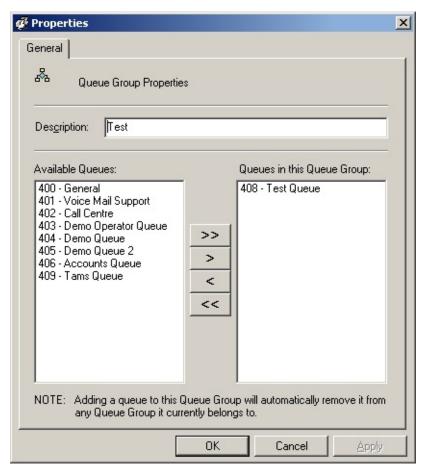


5. Right click in the right side of the screen to display the short-cut menu.



To add a new Queue Group

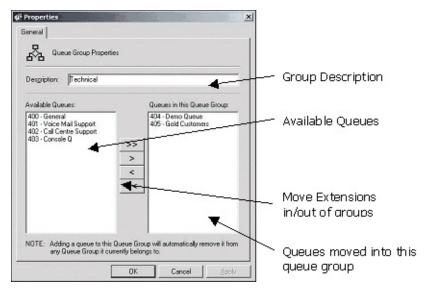
Select New Queue Group from the short cut menu shown above
 The Queue Group Properties form will display.



- 2. Enter Description.
- 3. Select required Queues.
- 4. Use Arrow Move buttons to move from Available Queues to/from Queues in this Queue Group.
- 5. Click OK.

To edit an existing Queue Group

- 1. Double click on the selected item.
- 2. A populated Queue Group Properties form will display.
- 3. Make any necessary amendments.
- 4. Click OK.



Descriptions of the available fields are set out below.

Description

Enter a description that matches the intention of the Queue Group for easy reference.

Available Queues

Queues that are available to be placed into the group.

Queues in this Queue Group

The queues that have already been added to the queue group.

Move Buttons

- >> Move all queues from Available Groups to Queues in this group.
- Move one queue at a time from Available Groups to Queues in this group.
- Remove one queue at a time from Queues in this group.
- Remove all queues from Queues in this group.

Note: A queue can only be in one group. Adding a queue to another queue group will automatically remove it from any Queue Group it currently belongs to.

See Also

Queue Groups

What is a Queue Group?

Deleting a Queue Group

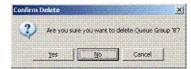
Deleting a Queue Group

To delete a Queue Group

- 1. Select the Queue Group you want to delete.
- 2. Right-click to show the Shortcut Menu.



- 3. Click Delete.
- 4. You will be prompted with a confirmation box.



5. Click Yes to remove or No to cancel.

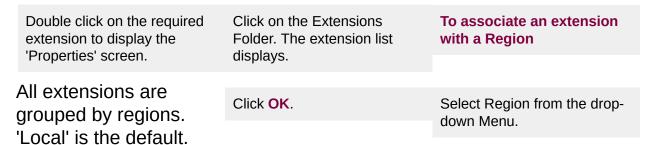
See Also

Queue Groups

What is a Queue Group?

Adding / Editing a Queue Group

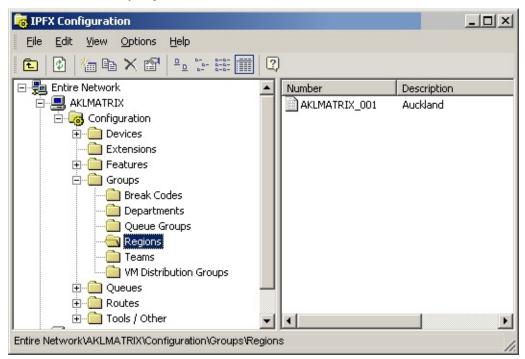
Regions



This feature is used primarily to specify a time zone for an extension or group of extensions, the Codecs and available bandwidth for interregional calls.

i.e. Extensions in Sydney are in a time zone 2 hours behind Auckland. This means that any time related activity, i.e. Voicemail means local time for that extension.

Use the path Configuration/Groups/Regions. The IPFX Configuration screen will display.



How to set up a New Region

• Right click in the right side window to display the Short Cut Menu.

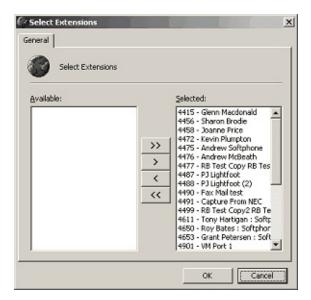


- Select New Region...
- The Regions screen will display.

General Tab



- Description Enter the Region description to be viewed in the Directory listing, i.e. Sydney office, Local etc.
- Dialplan Country Enter your country details
- SRST Gateway Select the Router/Gateway require for SRST
- Members This is the quickest method for associating extensions with regions.
- Click the Members button. The Select extensions screen displays.

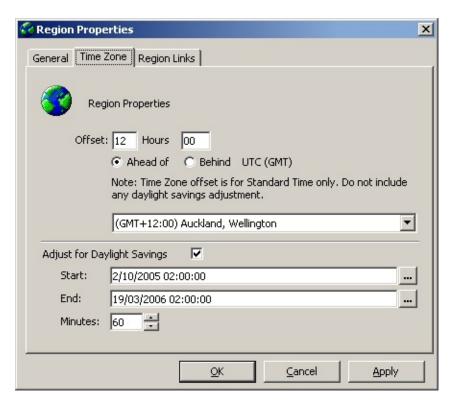


- Use the Move arrow buttons to select/deselect extensions.
- Click OK.

Note: The region is now set up and can be viewed in the Directory listing available to all users.

- Dial Plan enter the dial plan associated with the region
- Reset Phones resets the phones in that region.
 Do not do this unless you wish all phones in this region to reset.
 They will lose calls that are connected.
- Phone Graphic select for 7940/60 phones.

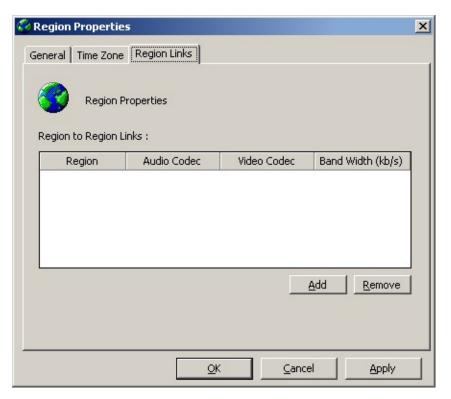
Time Zone Tab



Region Properties Offset - enter the relevant times for that region in Hours and Minutes and select either Ahead Of or Behind UTC (GMT); or you can select a region's default settings from the drop- down box.

Adjust for Daylight Savings - check/uncheck the box as required (if you check the box, enter the Start and End dates and Minutes from the drop-down menu.

Region Links Tab



This area describes the inter-regional call paths. Multiple regions can call each other using one IPFX server or multiple networked IPFX servers using only a network connection.

If you specify your own region you can then specify the Codec used for calls within your region. The Region dropdown menu contains a list of all available regions both on the local IPFX server and remotely advertised regions linked by networking.

If you do not have multiple regions this section is not mandatory.

- Click the Add button.
- A new line will display across all fields.
- Select Region, Audio Codec and Video Codec from the drop-down menus.

Note: Due to the similar bandwidth requirements of the a-law and u-law codecs, a link configured to use a-law will also pass calls based on u-law, and vice versa. Whether a call using a particular codec can be successfully completed depends on the configuration of the organisation's router.

Enter Bandwidth.

- Click Add again if required and enter new item.
- Click OK.

How to Delete an Existing Region

- Select the required item.
- Click the Remove button to delete.

How to Edit an Existing Region

- Double Click on the required Region to display the Regions Properties Screen shown below.
- Make alterations as required.
- Click OK.

Teams

What is a Team?

Depending on your Call Centre configuration, you may have agents who work on the same queue, but work in different teams, or agents who work in different queues but are part of the same team.

Once your teams have been set up, you can run reports to measure the teams instead of just comparing queues.

The Teams folder is only visible if the Call Centre module is installed.

Note: All extensions can be part of a Queue, not just IPFX Contact Centre agents.

See Also

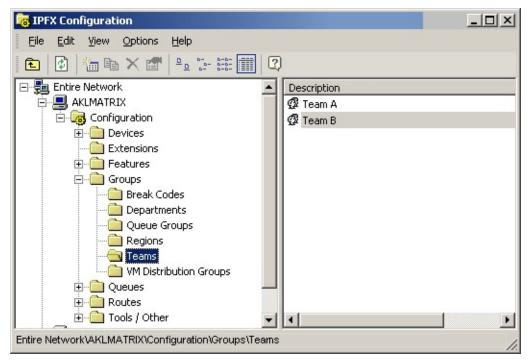
<u>Teams</u>

Adding / Editing a Team

Deleting a Team

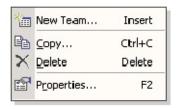
Adding / Editing a Team

Use the path Configuration/Groups/Teams to display the screen below.



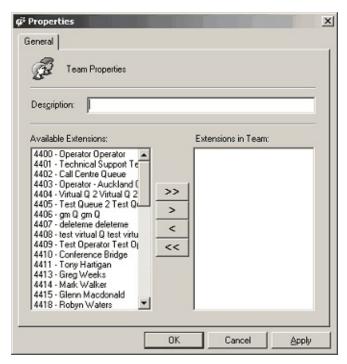
How to Set up a New Team

1. Right click on the right side of the screen to display the short-cut menu.



2. Select **New Team** from the short-cut menu.

The Properties screen displays, as shown below.

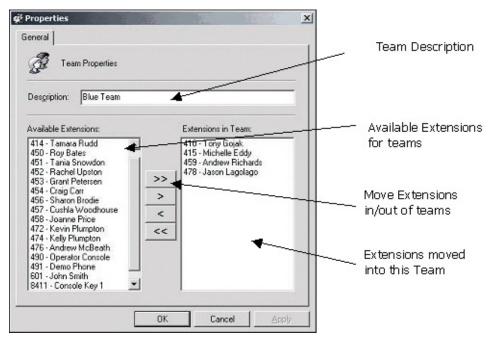


- 3. Enter new Description.
- 4. Select Available Extensions, and use the Move buttons to enter Extensions into Team pane.
- 5. Click Apply and OK.

To edit an existing Team

1. Double click on the selected Team.

A populated Properties Screen displays:



- 2. Enter changes.
- 3. Click **OK** to finish.

A description of the fields is set out below:

Description

Enter a description that matches the intention of the Team for easy reference.

Available Extensions

Extensions which are available for adding to the Team.

Extensions in this Team

Extensions which have already been added to the Team.

Move Buttons

- >> Move all extensions from Available Extensions to the Team.
- Move one extension at a time from Available Extensions to the Team.
- Remove all extensions from the Team.
- Remove one extension at a time from the Team.

See Also

<u>Teams</u>

What is a Team?

Deleting a Team

Deleting a Team

- 1. Select the Team you want to delete and right-click to display the Shortcut Menu.
- 2. Select Delete.



3. You will be prompted with a confirmation box.



4. Click Yes to Delete or No to cancel.

See Also

Teams

What is a Team?

Adding / Editing a Team

Voicemail Distribution Groups

What are Voicemail Distribution Groups?

Voicemail Distribution Groups allow a single voicemail message to be sent to many users at one time.

These groups can be allocated a number from 000 to 049 with 000 being automatically set up as Group 'All' which includes all staff who have a mailbox.

Groups are set up to simplify sending bulk voicemail messages to other staff by sending one message to everyone in the specified group.

A mailbox can be in multiple Voicemail Distribution Groups.

Only a supervisor or administrator can set the Voicemail Distribution Groups up; however, all staff can utilise them.

See Also

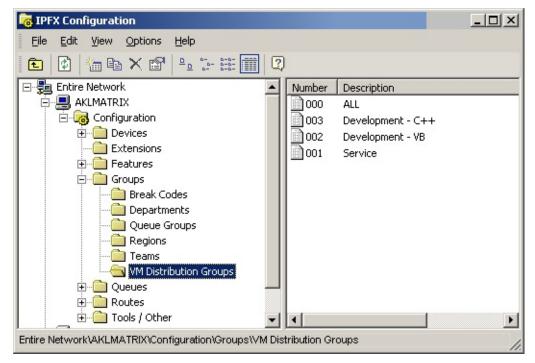
Voicemail Distribution Groups

Adding / Editing Voicemail Distribution Groups

Removing a Voicemail Distribution Group

Adding / Editing Voicemail Distribution Groups

- 1. Click on the **Config** button on the top menu bar.
- 2. Open the **Groups** Folder.
- 3. Open the VM Distribution Groups folder.
- 4. The IPFX Configuration screen displays.



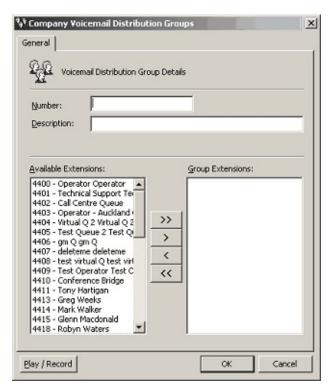
5. The right side of the screen will now show the existing VM Distribution Groups.

To Add a new Voicemail Distribution Group

 Right click on the right side of the screen to display the short-cut menu.



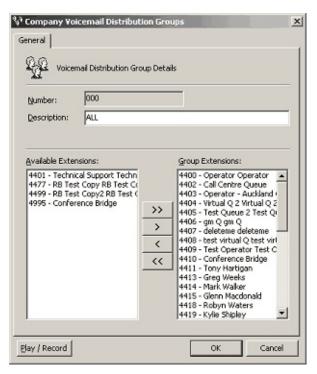
2. Select **New Company Group**. The Company Voicemail Distribution Groups screen displays.



- 3. Enter the Voicemail Group Number.
- 4. Enter the Description.
- 5. Select from the Available Extensions and use the move buttons to move to the Group Extensions pane.
- 6. Click OK.

To edit an existing Voicemail Distribution Group.

- 1. Double click on the selected item.
- 2. A populated Company Voicemail Distribution Groups screen displays.



- 3. Make changes as required.
- 4. Click OK.

A description of the Fields is set out below.

Number

This is the group number that staff will use to send a message to this group.

It must be a three-digit number between 000 and 049.

Description

The description should match the intentions of the group.

i.e. Technical = All staff that are involved on the technical side of the company.

Available Extensions

This shows all available extensions in your company which are available to be put into a group.

Group Extensions

This includes all the extensions you want in the group. When a message is sent using the group number, each of the extensions will receive the

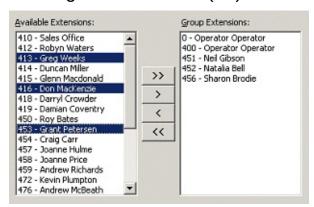
message.

Move Buttons

- >> Move all names from Available Extensions to Group Extensions.
- Move one name at a time from Available Extensions to Group Extensions.
- Remove one name at a time from Group Extensions.
- Remove all names from Group Extensions.

To add more than one name at a time, hold the CTRL key down and then click the names you require.

When you have selected all required names, you can move them using the single Move button (>).



Play/Record

Allows you to listen to or record the voicemail distribution group name. The system will phone your extension with an options menu to listen, rerecord or cancel the message.

See Also

Voicemail Distribution Groups

What are Voicemail Distribution Groups?

Removing a Voicemail Distribution Group

Removing a Voicemail Distribution Group

1. Right click on the Voicemail Distribution Group you want to remove and select **Delete**.



2. You will be prompted with a confirmation box.



3. Click **Yes** to delete.

See Also

Voicemail Distribution Groups

What are Voicemail Distribution Groups?

Adding / Editing Voicemail Distribution Groups

Queues

Holidays Defaults

In This Section

What are Holidays?

Adding / Editing a Holiday

Deleting a Holiday

See Also

Queues

<u>Preferred Agents Groups</u>

Queue Item Types

Queue Properties

What are Holidays?

Note: This feature only available if an IPFX Contact Centre module is purchased

This Holiday feature allows supervisors/administrators to programme all the Public Holidays for the year into IPFX with a description and a recorded greeting.

On the specified date of the Public Holiday, the Holiday greeting will play overriding all Queue Messages only.

This will only work if the Queue is on Automatic mode. If on Manual mode it will not cut over and it will have to be changed manually.

Note: For Main Day/Night messages, you can add/edit holidays by adding a date to the times tab within the main Audio Text message. See Config Audio Text.

See Also

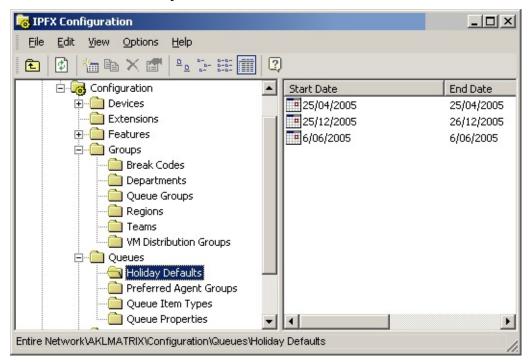
Holidays Defaults

Adding / Editing a Holiday

Deleting a Holiday

Adding / Editing a Holiday

- 1. Click on the Config button in the top tool bar.
- 2. Click on the Queues folder.
- 3. Click on the Holiday Defaults folder.



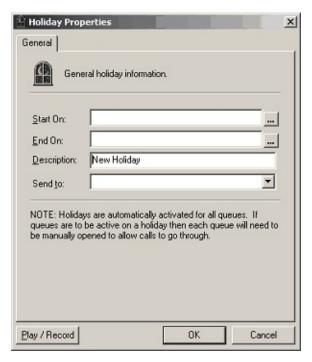
The right side of the screen displays the existing Holidays.

To add a new Holiday

Right click in this screen to display the short-cut menu, shown below.



The Holiday Properties form will appear.

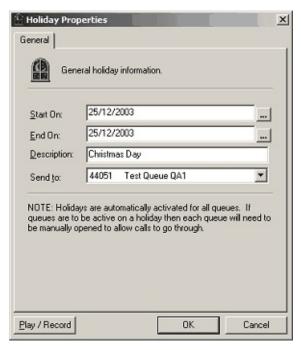


- 1. Select the **Start On**: date and time from the drop-down menu.
- 2. Select the **End On**: date and time from the drop-down menu.
- 3. Enter the Holiday description (e.g. Christmas Day, Anzac Day).
- 4. Select the **Send to**: field from the drop-down menu.
- 5. Click OK.

To edit an existing Holiday

1. Double click on the required message.

The existing Holiday Properties screen will appear (the same screen as above but displaying an existing holiday).



- 2. Enter any amendments as required.
- 3. Click OK.

Note: Holidays are automatically activated for all queues. If individual queues are to be active on a holiday, then each queue will need to be manually opened to allow calls to go through. Alternatively, holidays are individually updated in Queue schedules refer to Config/Queues/Settings.

For IPFX screen-based Consoles using TAPI:

This feature will not apply so the Main line will not cut over to a different greeting. You will have to put a date in the Audio Text for the greeting you require, unless it is a Queuing console.

For IPFX queuing Consoles:

The mode is usually set to manual. To enable holidays to operate you need to Reset the Queue to Auto by right clicking and resetting so they can adhere to the Public Holiday format.

Alternatively, you can set the IPFX Console individually in the IPFX Console configuration. Set the Queue to Auto when the Night button is selected.

For further information on this, please refer to the IPFX Console user

guide.

See Also

Holidays Defaults

What are Holidays?

Deleting a Holiday

Deleting a Holiday

To delete a Holiday

- 1. Select the Holiday you want to delete and right-click to display the Shortcut Menu.
- 2. Click Delete.



3. You will be prompted with a confirmation box.



4. 3. Click **Yes** to delete or **No** or **Cancel** to cancel.

See Also

Holidays Defaults

What are Holidays?

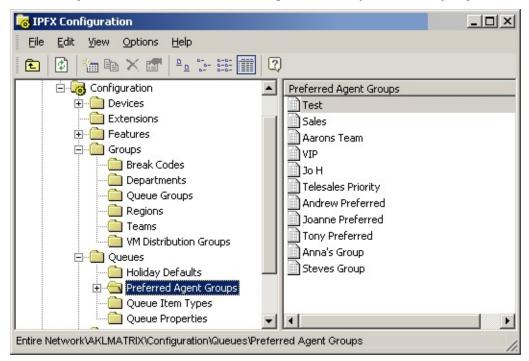
Adding / Editing a Holiday

Preferred Agents Groups

To access the Preferred agents Groups

- 1. Click on the Config button on the top menu.
- 2. Open the Queues folder.
- 3. Open the Preferred Agents Groups folder.

A list of your active Preferred Agent Groups will display.



Preferred Agent Routing

Preferred agent routing sends a caller through to a preferred agent within a queue group. This is very useful if customers have built up relationships with key agents within your Contact Centre environment.

Please note this feature is based on Calling Line Identification (CLI) if the customer is not using CLI then the call will be sent to the number dialled.

To enter customer details into the system, enter the customer contact information in the Company Directory refer to Company Directory/adding a contact.

To set up a Preferred Agent Route, you must first set up Group Names so that you can attach agents to these groups with the queue properties.

See Also

Preferred Agents Groups

To Add a Preferred Group

To Edit a Preferred Agent

Viewing Preferred Group Queues

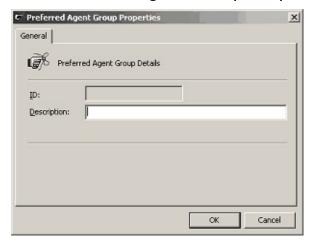
To Add a Preferred Group

To Add a Preferred Agent Group

- 1. Click on the Config. icon in the top menu bar.
- 2. Open the Queues Folder.
- 3. Open the Preferred Agent Groups Folder (above).
- 4. Right-click on the right side of the screen to display the shortcut menu.
- 5. Click New Preferred Agent.



6. The Preferred Agent Group Properties screen displays.



- 7. Enter an ID (this must be a number).
- 8. Enter the Description of your Preferred Group, (for example, "NZSales", "AusSales").
- 9. Click **OK**. Your group is now set up.

See Also

Preferred Agents Groups

Preferred Agent Routing

To Edit a Preferred Agent

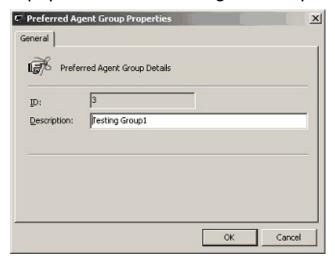
Viewing Preferred Group Queues

To Edit a Preferred Agent

- 1. Right click on the Preferred Agent Group you wish to edit, to display the short cut menu.
- 2. Select Properties



3. A populated Preferred Agent Group Properties Screen appears.



- 4. Alter details as required.
- 5. Click **OK** to finish.

Note: If you double click on the Preferred Agent Group you wish to edit, you will open the Group for viewing - you must right click and select properties to edit the Group itself.

See Also

Preferred Agents Groups

Preferred Agent Routing

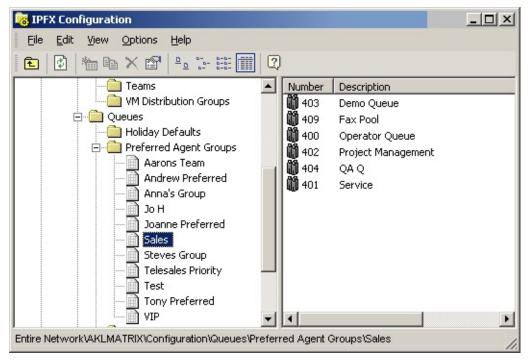
To Add a Preferred Group

Viewing Preferred Group Queues

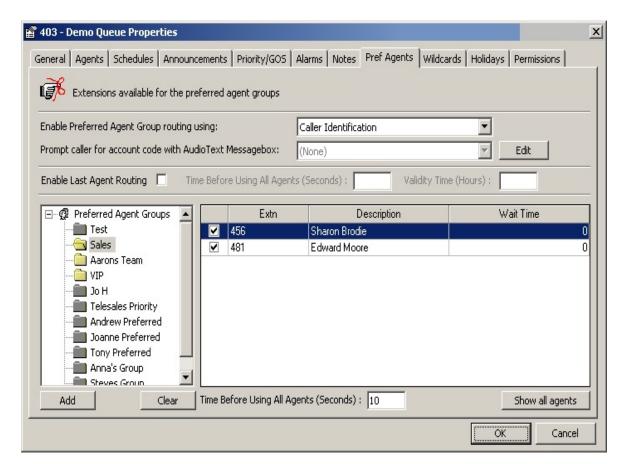
Viewing Preferred Group Queues

To view which Queues use a Preferred Agent Group

1. Click on the Preferred Agent Group, the queues will list, and show if they are being used by the Preferred Agent Group or not.



- 2. Double click on the queue you wish to view.
- 3. The screen will default to the Preferred Agent Tab:



For further information, please refer to Preferred Agents Tab.

See Also

Preferred Agents Groups

Preferred Agent Routing

To Add a Preferred Group

To Edit a Preferred Agent

Queue Item Types

About Queue Item Types

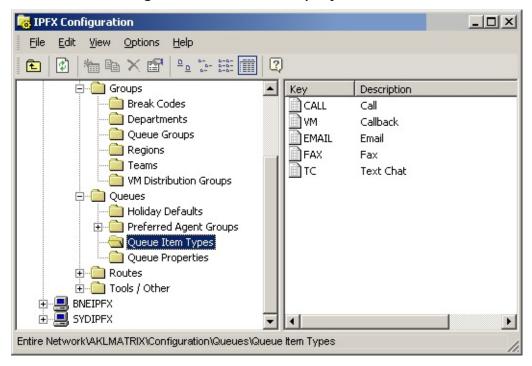
Important: This section is only available to your PBX Vendor (Reseller) any changes to be qualified with them

Queue Item Types provide you with system configuration information about the different Call Types available in the system, i.e: Incoming calls to the queue, emails to the queue, Callbacks in the queue.

Note: All Call Types are based on the module enabled.

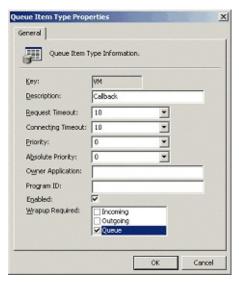
To access Queue Item Types

- 1. Click on the **Config.** Button on the top menu bar.
- 2. Open the Queues Folder.
- 3. Open the Queue Item Types folder.
- 4. The IPFX Configuration screen displays.



To edit an existing Queue Item

- 1. Double click on the selected item.
- 2. The Queue Item Type Properties screen displays.



- 3. Make amendments as required.
- 4. Click OK.

A description of fields on the Queue Item Type Properties screen is set out below.

Key

This is the Unique Identifier assigned by the system to identify the Call Type.

Description

This is the English description of the Call Type, ie: Call, email, Callback, etc.

Request Timeout

When the Datastore Application issues a request to dial etc, the request timeout is how long it waits for a response before timing out.

Connecting Timeout

When a call is delivered to an extension, the connecting timeout is how long it waits before pulling the call back to the queue for redelivery to another agent logged into the Queue. This is based on 'no answer'.

Type: Call Absolute Priority:
9
Two item types can be set to the same absolute priority, but have a different priority, example:

Type: TXT Absolute Priority:
8 and a Priority: 9

Priority

This enables the priority that a call has over other Call Types.

9 is the highest priority.1 is the lowest priority.

In this case calls will always get answered before text chats and callbacks, but when there are no more calls, text chats will get answered before callbacks, unless a callback has been waiting for a long time.

Type: VM Absolute Priority: 8, Priority: 8

If a Call Type/Call has a

priority of 9 over other Call Types such as email, which has a priority of 8, then Calls will deliver to agents first.

Note:

If a Call has just come into the queue with a priority of 9, but an email with a priority of 8 has been in the queue for 5 seconds, then the email will take priority as the priority is based on time as well as the priority level.

This is worked in conjunction with the Queue/Priority/GOS Tab on the graphs, i.e:

If priority line is set to 0 on the graph, then the Call Type will be multiplied by the time it has been queueing, ie:

If 0 seconds on the graph, then 9 priority will be multiplied by 0 = 0

If 1 second on the graph, then 9 priority will be multiplied by 1 = 9

If 2 seconds on the graph, then 9 priority will be multiplied by 2 = 18

If this is worked with another Call Type, eg: Emails on priority 8:

If 0 seconds on the graph, then 8 priority will be multiplied by 0 = 0

If 1 second on the graph, then 8 priority will be multiplied by 1 = 8

If 2 seconds on the graph, then 8 priority will be multiplied by 2 = 16

This means that if an email has been in the queue for 2 seconds and a Call has been in for 0 seconds, then the email has the higher priority of 16, so this Call Type will take priority.

Absolute Priority

This is where you can advise which call types will override other types irrespective of the Priority.

Owner Application

This is a System Field which is used for internal messaging.

Program ID

This is a System Field which is used for internal messaging.

Enabled

This enables the Call Type to be active you need to ensure the other setup rules are applied please see your voicemail vendor.

Wrapup Required

This enables Wrapup Codes to be applied for all Call Types.

See Also

Queue Item Types

Queue Properties

About Queue Properties

A queue is an extension of the PABX, which directs incoming calls or forms of media, eg: Fax, Email, etc,) to the queue pilot in a Call Centre environment. When a call comes into the queue, it is managed by the queuing system and co-ordinated based on the queue settings.

The supervisor/administrator can configure queue agents, Priority/Service levels, Grade of Service, schedules, announcements, etc, based on the requirements of the Call Centre.

Note: This feature only available if an IPFX Contact Centre module is purchased and Email, Fax and Queue Callback features only available if the relevant modules are purchased.

See Also

Queue Properties

Adding / Editing a Basic Queue

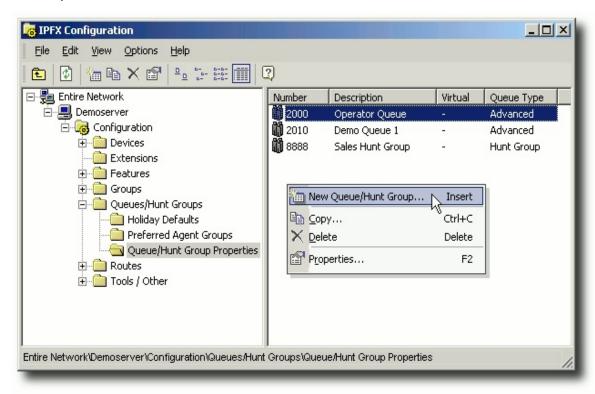
Adding/Editing an Advanced Queue

Adding / Editing a Basic Queue

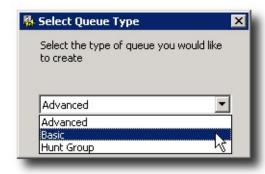
Click the Config button in your client's toolbar and navigate to the folder **Configuration > Queues > Queue Properties**.

To create a New Basic Queue

1. Right Click in the right side of the screen to display the short cut menu, shown below:



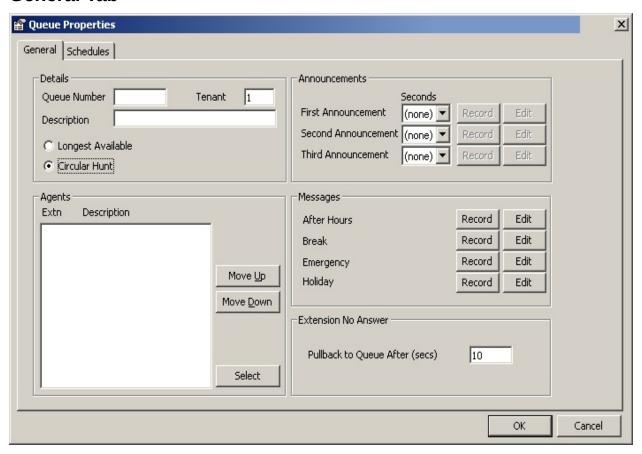
- 2. Select New Queue
- 3. You will be shown the options in the screen below:



Select Basic.

■ The Basic Queue Properties screen appears. An example of the Basic Queue Properties is shown below.

General Tab



A description of the fields on this screen is set out below.

Queue Number

This is the Queue number given to the queue group when initially set up. It must not be the same as a normal extension number.

This needs to be set up at a PABX level and added to extensions and registered prior to creating a queue.

Tenant

If more than one company share the same PABX, tenants can be set up into groups. i.e. Company X will only be able to communicate with other extensions in the same tenant number (ie. Tenant 1). This also applies for Queues.

Description

Enter a description that matches the intention of the Queue for easy reference.

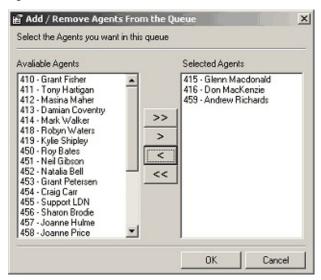
Longest Available

This means that the phone which has been idle the longest within a queue will receive the next call. This is the default.

Circular Hunt

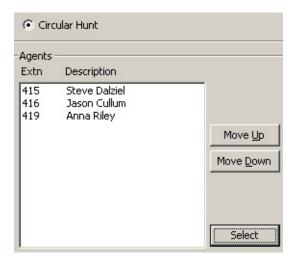
This means that all calls are continuously despatched to Agents in the order selected. When Circular Hunt is selected the Move Up/Move Down and Select buttons become visible (as shown in the screen above).

Click the *Select* button to display the Add/Remove Agents from the Queue screen:



Use the Arrow buttons < > to select/deselect Agents for this queue. Click **OK**.

The Agents will appear in your Queue Properties screen, i.e.



If you wish to change the order in which the Agents appear:

- Select the Agent you wish to move.
- Use the Move Up/Move Down buttons to rearrange the list.

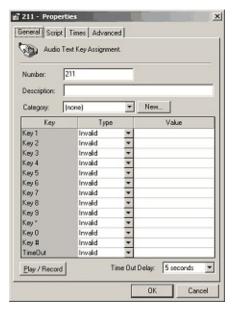
Announcements

These instructions apply to the First, Second and Third Announcements.

Select the time to elapse in seconds (the available range is Zero to 300) from the drop-down menu beside each announcement.

The **Record** button becomes active when the Seconds field is populated. Click the Record button to record your message.

Click the **Edit** button to display the screen below.

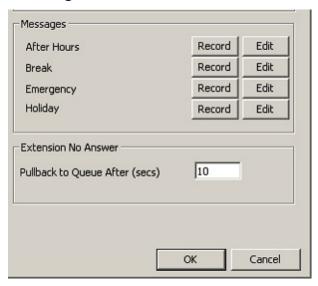


Make alterations if required.

Click OK.

Note: For further information on how to set up an Audio Text Box, please refer to <u>Audio Text</u>.

Messages



Click the **Record** button to record your message for each type. i.e. After Hours, Break, Emergency, Holiday.

Click the **Edit** button to amend your message if required.

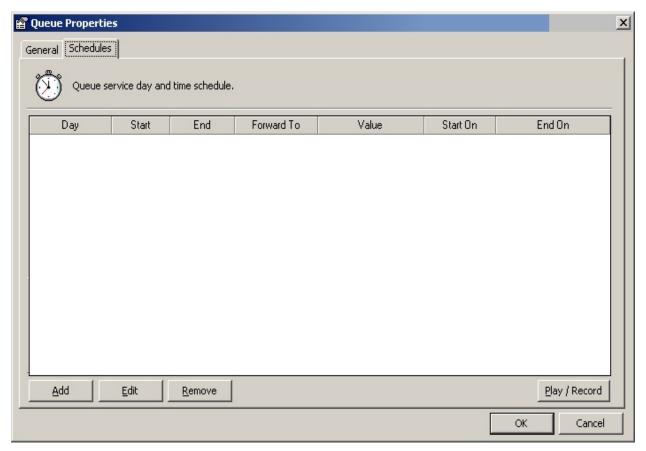
Extension No Answer

Pull Back to Queue After (secs). The default for this is 10. You can change this if required.

Note: Ensure that this value is *less* than the queue extension's <u>Forward Timeout</u> value. If the <u>Pullback to queue</u>... value is greater than the <u>Forward Timeout</u> value, unanswered calls to the hunt group may be forwarded to an agent's voicemail.

Note: IPFX Call Centre Express only provides standard Calls in the queue, not different forms of media such as Emails and Faxes, etc.

Schedules Tab



Please refer to Advanced Queues' Schedules Tab.

See Also

Queue Properties

About Queue Properties

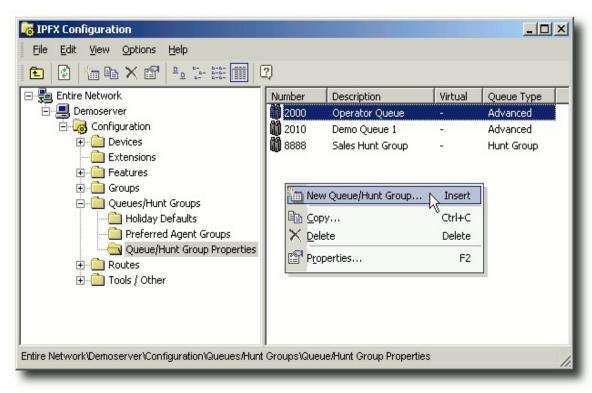
Adding/Editing an Advanced Queue

Adding/Editing an Advanced Queue

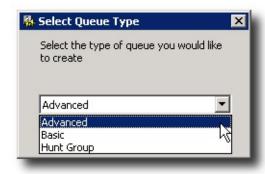
To add or edit a queue, click the Config button in your client's toolbar and navigate to the folder **Configuration > Queues > Queue Properties**.

To create a New Advanced Queue

1. Right Click in the right side of the screen to display the short cut menu, shown below.

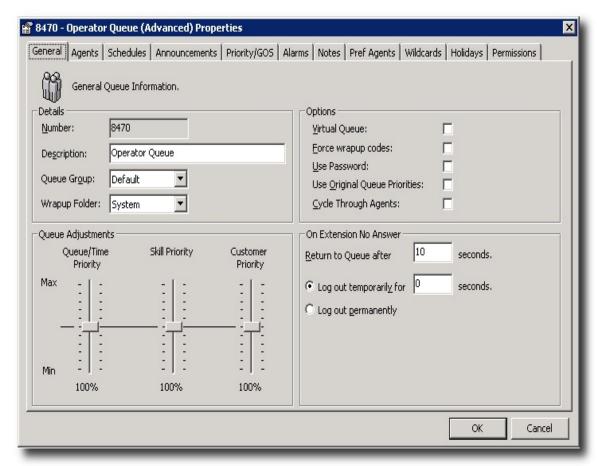


- 2. Select New Queue
- 3. You will be shown the options in the screen below:



4. Select Advanced.

5. The Advanced Queue Properties screen appears:



Note: An LCD tab and Register button will also display on this screen if installed on an IPFX for NEC platform.

Note 2 To copy a queue, right click on the required queue and select copy - a copy of the queue properties screen will appear on your screen. Enter the new Queue Number for the copied screen, Click **OK**.

To Edit a Queue

- 1. Double Click on the required Queue to display the Queue Properties Screen, or right-click to display the short cut menu and select Properties.
- 2. Enter amendments as required.
- 3. Click OK.

In This Section

General Tab

LCD Tab

Agents Tab

Schedules Tab

Announcements Tab

Priority / GOS Tab

Alarms Tab

Notes Tab

<u>Preferred Agents Tab</u>

Wildcards Tab

Holidays Tab

Permissions Tab

See Also

Queue Properties

About Queue Properties

Adding / Editing a Basic Queue

General Tab

A Description of the fields on the General Tab is set out below.

Details

Queue Number

This is the Queue number given to the queue group when initially set up. It must not be the same as a normal extension number.

This needs to be set up at a PABX level and added to extensions and registered prior to creating a queue.

Tenant

If more than one company share the same PABX, tenants can be set up into groups. i.e. Company X will only be able to communicate with other extensions in the same tenant number (ie. Tenant 1). This also applies for Queues.

Description

Enter a description that matches the intention of the Queue for easy reference and LCD Displays on Screen Pops.

On an NEC only - this also shows as an LCD display on a Dterm phone.

Queue Group

Use the default queue group or select one that has been produced under Queue Groups. Refer to the Queues/Queue Properties Section for further information.

Register (on IPFX for NEC only)

The Queue must be registered for the PABX to be able to communicate with the Queue number.

Wrapup Folder

Select the required Wrapup Folder to ensure that the correct Wrapup codes show on the Popup screen when a user has taken a call. Refer to The Wrapups in the Features Section to set up Wrapup Codes and Folders.

Options

Virtual Queue

A virtual queue is utilised where you may have two different DDI/DID lines that callers will come through into one queue. This enables :

- Agents to see and answer calls with the correct company description.
- Separate after hours messaging for each company, Company 'A' can have different opening/closing times from Company 'B'.
- Separate announcements for each company.
- Separate Alarms.
- Separate Call Priorities.

Note: Individual reporting is not a feature - if this is required two separate queues are required.

Force Wrapup codes

If you need to report on why customers called, you can force wrapup codes on. The agent must then select a wrapup code at the end of the call before he/she can take another queue call.

This can be done on the phone (set up is required) or via the popup screen, by activating wrap-up codes from your Popup Screen options. Refer to your User Guide.

Note: You can force wrapup codes for individual extensions if you do not wish to force on the queue for in/out and queue- related calls. See extension Options for more information.

Use Password

A password can be set per queue so that only Supervisors knowing the password can alter any queue settings. This controls the accessibility of the queue.

- Select the Use Password checkbox. A set/confirm password box will appear.
- 2. Using only number characters (0 9) type your password and click **OK**.



Use Original Queue Priorities

Enables all priorities to be based on the first queue the call has passed through, e.g. a virtual queue.

Cycle Through Agents

Use the **cycle through agents** setting on queues when you anticipate that agents may be called away from their desk without having time to log out of the queue.

If call is delivered to an agent who fails to answer, a queue with this setting turned on will not attempt to deliver the call to that agent again unless all remaining agents have similarly failed to answer the call.

For example, consider a queue set to **Cycle Through Agents** that has three logged-in agents: Aynslie, Fayola, and Torometi. If a call is delivered to Aynslie's phone, but she fails to answer, the call will return to the queue. The call stay in the queue until either Fayola or Torometi is available to take the call; the system will *not* re-deliver the call to Aynslie's phone even if she is available to take calls. Only if Fayola and Torometi also fail to answer the call will the system consider delivering the call to Aynslie again.

Extensions No Answer

Return to Queue After (secs)

You can change the length of time that callers can ring at an extension before being pulled back to the queue for redelivery to another agent. Enter the time in the Seconds field.

Note: Ensure that this value is *less* than the hunt group extension's <u>Forward Timeout</u> value. If the <u>Pullback to hunt group</u>... value is greater than the <u>Forward Timeout</u> value, unanswered calls to the hunt group may be forwarded to an agent's voicemail.

Temporary Logout for (secs)

If an extension is logged into the queue and a queue call delivers to that extension, you can set the individual queues to temporarily log the agent out of the queue on no answer. Enter the time in the Seconds field.

The user's location icon will show as Office location.

Note: The extension will be automatically logged back in after the second interval you have entered as the temporary timer. Agents may also manually log themselves out and back in to return to the queue.

Permanent Logout

If an extension is logged into the queue and a queue call delivers to that extension, you can set the individual queues to permanently log the agents out of the queue on no answer. If you select this option the Temporary Logout Extension field is greyed out.

The user's location icon will show as Office location.

When Permanent Logout is selected from this system a message is sent to the LCD Screen on your phone.



Note: The extension will have to log back into the queue after this has taken place.

Queue Adjustments

The slider bar features allow the supervisor/administrator to make temporary adjustments to each of these features without having to make complete changes to Call, Skill or Customer Priorities. These features work in conjunction with the Priority/GOS Tab, i.e. If you increase the skill

priority to 200%, it takes the skill level value and multiplies it by two. This can allow queues to override each other in relation to an incoming call.

This feature is useful when you have the same agents in multiple queues and want to change priorities for a time frame.

See Also

Adding/Editing an Advanced Queue

LCD Tab

Agents Tab

Schedules Tab

Announcements Tab

Priority / GOS Tab

Alarms Tab

Notes Tab

Preferred Agents Tab

Wildcards Tab

Holidays Tab

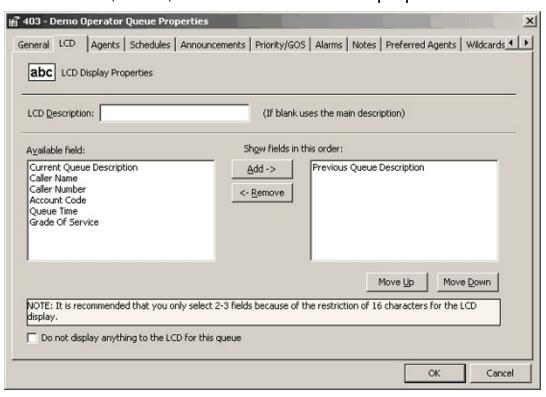
<u>Permissions Tab</u>

LCD Tab



PBX Dependent Feature!

The LCD (Liquid Crystal Display) is the screen on your telephone that shows dates, times, menu features and call properties.



LCD Description

This is the description which will appear on the agents phone to alert them to the queue the caller has come through. (Providing they have a digital phone with a LCD screen).

Available Fields

When a call comes to an agent's phone, the available fields chosen can show call information such as how long the caller has been in the queue, their name and number (if caller ID is enabled), the Grade of Service. You are limited to 16 characters on the NEC LCD screen, so you may only want to choose 2 3 of these fields.

Add / Remove

To add fields to display on the LCD screen

- 1. Select the Available Field.
- 2. Click the Add button: Add >>

To remove a field that is displayed

- 1. Select the field.
- 2. Click on the Remove button: <- Remove

Show fields in this order

This is the order that the fields will show on the LCD screen on the agent's phone.

Move Up / Move Down

You can use the Move Up / Move Down buttons to set the order of the fields.





See Also

Adding/Editing an Advanced Queue

General Tab

Agents Tab

Schedules Tab

Announcements Tab

Priority / GOS Tab

Alarms Tab

Notes Tab

Preferred Agents Tab

Wildcards Tab

Holidays Tab

Permissions Tab

Agents Tab

The IPFX Call Centre Express module enables agents to answer calls as standard forms of media coming into the Queue.

The IPFX Contact Centre module enables agents to answer Calls and accept Emails, Faxes, Callbacks and other forms of media if the modules have been purchased.

This section covers off how to:

- Add an Agent to the Queue for all Call Types
- Add Queue Agent Profiles

If you require addition information on how to set up IPFX Document Routing, please refer to <u>Document Routing</u>.

If you require additional information on how to set up IPFX Callbacks, please refer to <u>Queue Callback</u>.

See Also

Adding/Editing an

Advanced Queue

General Tab

LCD Tab

Schedules Tab

Announcements Tab

Priority / GOS Tab

Alarms Tab

Notes Tab

Preferred Agents Tab

Wildcards Tab

Holidays Tab

Permissions Tab

In This Section

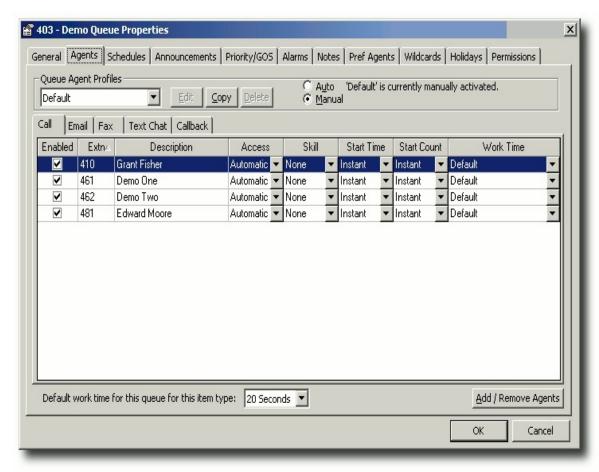
Adding an Agent to the Queue

Queue Agent Profiles

Adding an Agent to the Queue

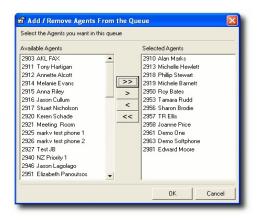
To Add an Agent to a Queue

- 1. Double click on the required Queue to display the Properties Screen.
- 2. Click on the Agents Tab to display the screen below.
- 3. Click on the Call Type Tabs, eg: Call, Email, Fax. These Tabs allow you to add agents to the relevant forms of media queuing. Please note that Email, Fax, Callback, Text Chat, etc, are all additional modules to the core Contact Centre.



4. Click on the Add/Remove Agents button

This will display the Add/Remove Agents from the Queue screen.



5. Select required Agents and move using the Move buttons (>> > < <<).

Click OK when selection is complete.

6. The Properties Screen/Agents Tab will re-display showing additional agents included.

Click OK.

A description of the fields available on the Agents Tab is set out below.

Enabled

Enables the agent to get calls or to restrict calls to them.

Extn

The extension number of the agent.

Description

The name of the user associated with this extension.

Access

Agents have different access levels to be in a queue. Depending on your requirements, you can set different access levels for agents.

Double click in the access column of the selected new agent.

Select access level.

Click OK.



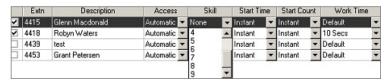
Automatic The agent will receive calls automatically if they are logged into the queue.

Pickup The agent can pick up calls if they are not logged into the queue. This feature only available on the IPFX for NEC platform.

Overflow The agent will receive the call if no other logged in agents are available.

Skill

Each agent is assigned a skill level from 1 to 9 depending on company requirements. An agent with a higher skill level will receive calls preferentially over agents with lower skill levels. Use the drop-down menu beside your selection and choose from None to 9. Click OK.

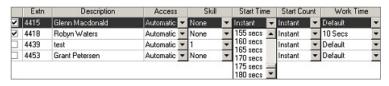


Start Time

Agents can be assigned a start time for a queue call that will enable the call to be delivered to their extension after the call has been queuing for a specified timeframe.

Select from the drop-down menu. The available range is from Instant to 180 seconds.

Click OK.

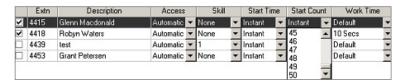


Start Count

Agents can be assigned a start count for a queue call that will enable a queue call to be delivered to their extension after a set number of calls have been queuing.

Select start count from the drop-down menu. The available range is from Instant to 50.

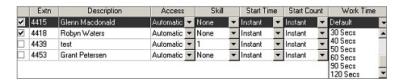
Click OK.



Work Time

Work time is the time available to the agent to process a finished call before receiving the next. Calls with not be delivered to an agent during Work time. Work Time can be set individually for each agent.

Use the drop-down menu and choose from Default to 120 seconds. Click OK.



Note: The system will look at the following settings, in the given order of priority, to determine an agent's Work Time:

- 1. An agent's own Work Time setting (this may be either manually set or by set by default)
- 2. The agent's Work Time from the Queue extension default.
- 3. The Global Queue Work Time setting.
- 4. The Work Time setting for the Queue item type (i.e. media).

Default Menu for this Queue Item Type

Set the default time here for the selected item. Click OK.



Select from the drop-down menu. Select from None to 120 seconds.

See Also

Agents Tab

Queue Agent Profiles

Queue Agent Profiles

What are Queue Agent Profiles

Dynamic Queues allow for Queue Agent Profiles to be set up within a Queue. A Queue Agent Profile, enables Supervisors/Administrators to set criteria in place that will allow calls to route to a Queue Agent Profile based on:

- Date
- Day
- Time of Day
- A threshold of calls coming into the Queue has been exceeded per Agent logged in to take calls.
- A threshold of calls coming into the Queue has reached a minimum point per Agent logged in to take calls.

If your profile is on 'Auto' mode, then the rules from the Queue Agent Profile Schedule will be adhered to. If you select Manual, this profile will manually override any profile in place, until it is put back to 'Auto' mode.

```
O Auto 'Default' is currently manually activated.

Manual
```

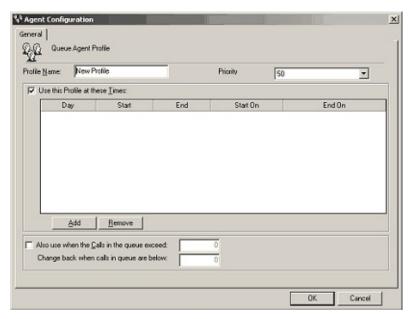
If you have two profiles that could potentially activate at the same time, the priority field will ensure that the correct Queue Agent Profile will set at the correct time. Priorities range from 1 to 100 - 100 being the highest and 1 being the lowest priority.

To Create a Queue Profile

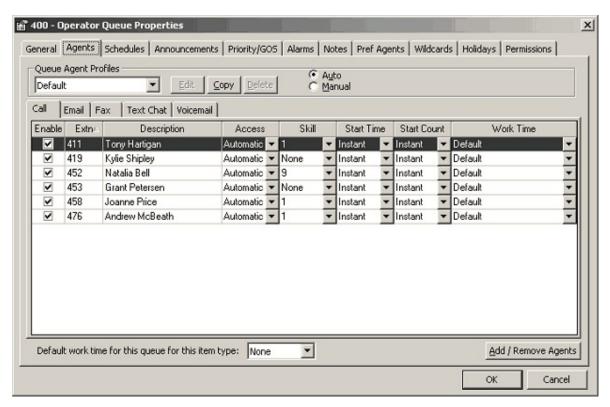
- 1. Select **Config**.
- 2. Select Queues
- 3. Select Queue Properties.

The Screen below displays.

- 4. Select the **Agent** Tab within Queue Properties.
- 5. Click the drop-down box for Queue Agent Profiles.
- 6. Select **New Profile** to create a new profile.



- 7. Enter the name/description of your Queue Agent Profile.
- 8. Enter the Priority time.
- Click the Add button to add days and times. If you do not wish to select a day/tme then deselect the "Use this Profile at these Times" checkbox. You will only need to do this if your only criteria is to introduce new agents to the queue when calls exceed a certain criteria.
- 10. Click OK.
- 11. The Properties/Agents Tab screen displays.
- 12. Select 'Add/Remove Agents' as per the normal method



- 13. Click OK.
- 14. You have now set up a profile based on Day/Time, Call Criteria and what agents you wish to be in the queue. Based on your criteria, this profile will activate automatically unless you manually override as stated earlier.

Note: When you select the 'Enable/Disable' checkbox on the left hand side, this will identify whether the agent is available to be logged into the queue or not.

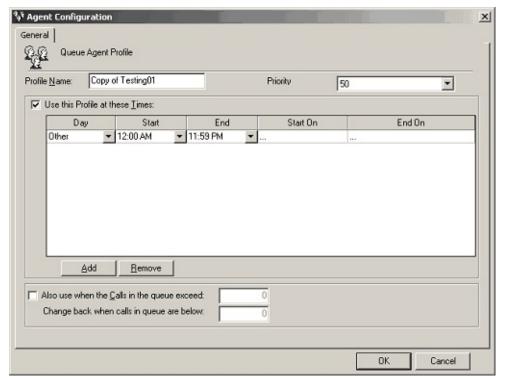
To Edit a Profile:

- 1. Select the Queue Agent Profile.
- 2. Select Edit.
- 3. Make your relevant changes
- 4. Select OK.

To Copy a Queue Agent Profile:

1. Select the Queue Agent Profile

- 2. Select Copy
- 3. A copy of the profile select will display. Change the Profile name as required.



4. Click OK.

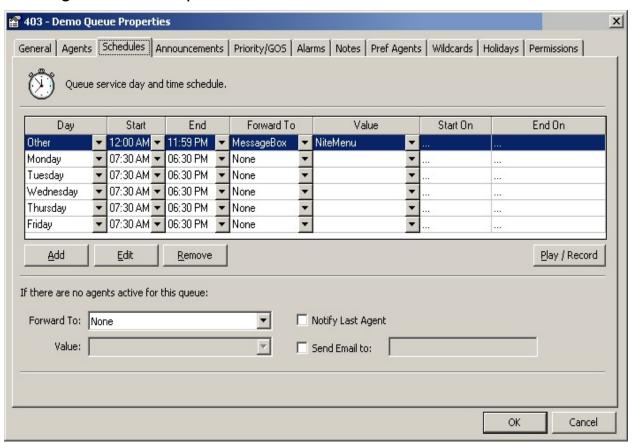
See Also

Agents Tab

Adding an Agent to the Queue

Schedules Tab

Queues can be set to open and close automatically by setting a schedule. For after hours scheduling the queue can be sent to a message or another queue.



A description of fields available on the Schedules Tab is set out below.

Day

Selecting a day (Monday to Sunday) will apply the given schedule only on the selected day of the week. If the same day of the week is listed more than once, the more specific schedule applies. For example, the following settings will open the queue on Mondays from 9am to 5pm, except for the Monday of October 1st 2007 when the queue will be forwarded to a message box instead:

Day	Start	End	Forward To	Value	Start On	End On
Monday	09:00	05:00	None			

AM PM

Monday 12:00 11:59 AM PM MessageBox 29999 NewYears 1/10/2007 1/10/2007

Select **Other** to have the schedule apply to days of the week not otherwise listed.

Start

The time the queue or specified action is to login and become live. Select from the drop-down menu.

End

What time the queue or specified action is to logout Select from the drop- down menu.

Forward to

You can forward the queue to three options: None, Message Box, Queue.

None will not forward the queue anywhere. For day

queues, this would be the most common.

Message Box will forward the queue to a message box that is

specified under value.

will forward the queue to another queue that is

specified under value. This will not change

reporting statistics.

Note: If you change the Forward to option back to none when it was previously a queue, you will not be able to take out the previous queue number from the value section. This is not an issue as the 'Forward To' option will override the 'value' option.

Value

Queue

When you forward the queue to Message Box or Queue, you must insert a value into the Value field.

For a Message Box, this will be an Audio Text Message value and for Queue, will be another Queue number.

Start On

1. Double click in this field to display the Date Time Picker screen.



- 2. Select the start on date and time.
- 3. Click OK.

End On

- 1. Double click in this field to display the Date Time Picker screen.
- 2. Select the End on date and time.
- 3. Click OK.

Add

Click the Add button to add days to the screen:

This will schedule the following day based on the selected day, with the same start and end times.

Edit

To edit the Message, select the day (it must be forwarded to a message box) and click on the Edit button:

The message box properties will appear. (See Audio Text).

Remove

Click on the day you want to Delete and click on the Remove button:

Bemove

Remove

R

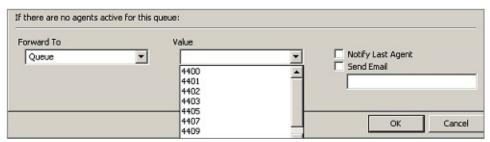
If there are no agents active for this queue

Forward to and Value

When there are no agents logged into the Queue, select a destination from the drop-down menu to avoid a queue call being unattended. When

this field is populated the Value field becomes available. i.e.

- If Queue is selected, the Value field drop-down menu lists all available queues.
- If Message Box is selected the Value field drop-down menu lists all available message options.



Notify Last Agent

Check this box to automatically warn the last agent who attempts to log out.

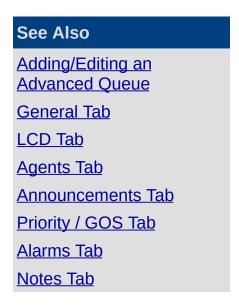
Send an Email

Check this box and enter a valid Email address to whom an Email message (Supervisor, Team Leader) is to be sent when a queue is left unattended. (If this box is not checked the address field is not available).

Play/Record

Allows you to listen to or record the required greeting.

The system will phone your extension with an options menu to listen, rerecord or cancel the message.



Preferred Agents Tab

Wildcards Tab

<u>Holidays Tab</u>

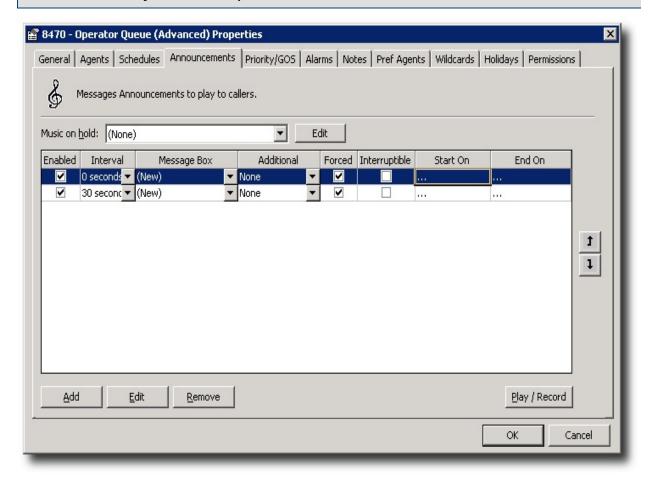
Permissions Tab

Announcements Tab

While callers are in the queue waiting to speak to an agent, they can be played announcements at specific intervals.

These announcements could be to advise the caller that the operator is on another call and will be with them as soon as possible, or announcing the caller's position in the queue.

Note: While your callers are waiting, you could set up announcements that advertise your latest products or services.



A description of fields on the Announcements Screen is set out below.

Music on Hold



Click on the arrow at the end of the Music on hold field to display the

drop-down selection menu:



For further information on setting up Music On Hold please refer to your Technical Training Manual or your voicemail vendor.

Edit

Click this button to amend the selected Music on Hold file.

If on an IPFX for Call Manager platform, this sets up Music on Hold defaults for Queues and Personal Queues only. This feature only available if an IPFX Contact Centre is purchased.

If on an IPFX Director platform, Default should be selected as Music on Hold system files are played for all users, queues and personal queues.

Enabled

Check this box to allow the announcement to be played.

You may wish to set up announcements for specific events in advance:

Interval

This tells the gueue when to play the announcement to callers.

The last announcement will loop around and play at the specified Interval.

Note: The second message (as noted above) will play 30 seconds after the first message has finished playing, not at 30 seconds.

Msgbox

This is the message that you want played at the specified intervals. (The message would be set up in Audio Text).

Additional

You can advise callers of their position in the queue.

For example: 'You are now 4th in the queue'. This is played immediately after the Message Box.

Select Position in the Queue from the drop-down menu.

Forced

Force the announcement to be played after the specified interval, even if agents are available to take the call.

The **Forced** setting allows a caller to hear the queue announcement, even when the call spends a negligible amount of time in the queue. This situation may occur, for example, when a call is repeatedly delivered to a logged-in agent who has walked away from their desk. Ordinary (unforced) announcements are not played to such calls; a forced announcement will be played despite the apparent availability of queue agents.

This option over-rides and subsumes the **Interruptible** setting (below), and like the non-Interruptible setting, may cause a call to fall victim to queue-jumping.

Interruptible

When an agent becomes free, the announcement can be interrupted and the caller put through. If this option is unchecked, the announcement will be played completely.

Note: If an announcement has Interruptible unchecked, the caller's wait time could be increased as the formerly available agent may have accepted another call while the announcement was being played. This could result in calls queue jumping.

Start On

1. Double click in this field to display the Date Time Picker screen.



- 2. Uncheck the 'All Dates and Times' checkbox.
- 3. Select the start on date and time.
- 4. Click OK.

End On

- 1. Double click in this field to display the Date Time Picker screen.
- 2. Uncheck the 'All Dates and Times' checkbox.
- 3. Select the End on date and time.
- 4. Click OK.

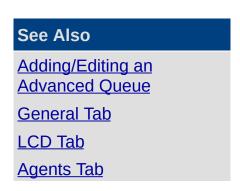
Play/Record

Allows you to listen to or record the required greeting. The system will phone your extension with an options menu to listen, re-record or cancel the message.

Moving Sequence of Announcements

You can change the sequence of the announcements played by selecting the announcement and clicking on the Move Up / Move Down buttons:





In This Section

Editing an Announcement

Schedules Tab

Priority / GOS Tab

Alarms Tab

Notes Tab

<u>Preferred Agents Tab</u>

Wildcards Tab

Holidays Tab

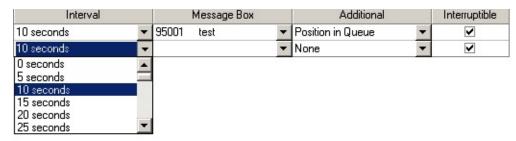
Permissions Tab

Editing an Announcement

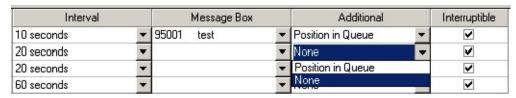
To Edit an Announcement

To edit the Interval, double-click on the Interval time, a drop-down box will appear.

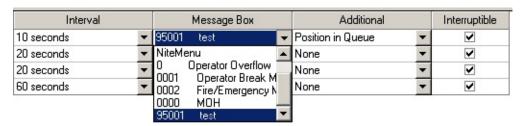
Select the new interval.



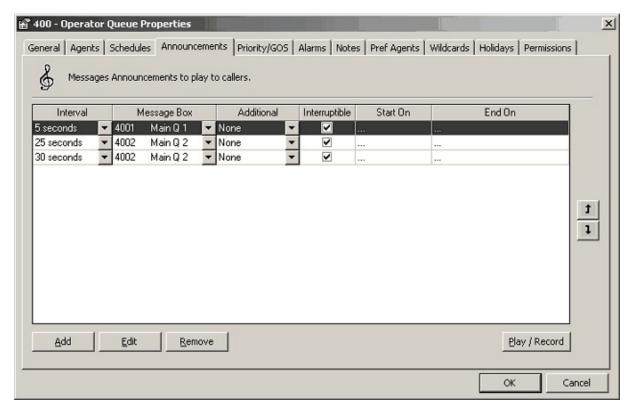
To edit the Additional field, double-click and select the required setting from the drop-down box.



To edit the Message Box, double-click in the Message Box and enter your (new) message box number or select from the available Message Boxes.

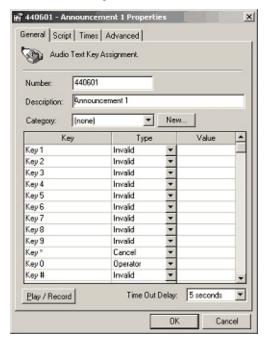


You can edit the entire Message Box by selecting the Announcement line.



Click the **Edit** button (above).

This takes you to the Audio Text / Message Box section.



This saves you going back to Config Audio Text.

Supervisors can utilise this functionality for their own queues.

They cannot access Audio Text or the Configuration option.

To Add an Announcement

- 1. Click on the **Add** button to add a new line to the screen:
- 2. Select new data from the drop-down menus.
- 3. Click OK.

To Delete an Announcement

- 1. Click on the announcement you want to Delete and click on the Remove button:
- 2. The selected announcement will be deleted.

Play/Record

Allows you to listen to or record the required greeting. The system will phone your extension with an options menu to listen, re-record or cancel the message.

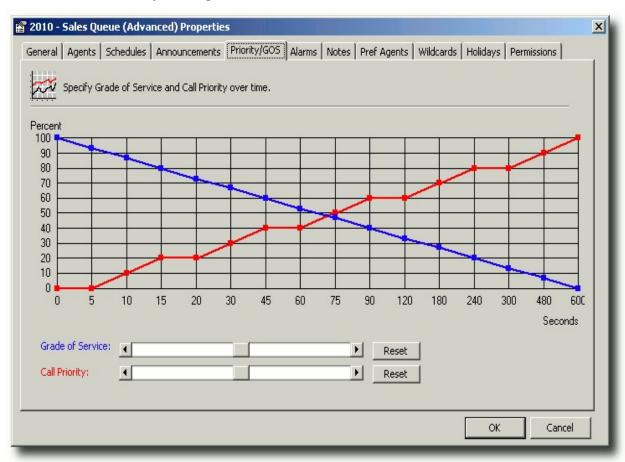
See Also

Announcements Tab

Priority / GOS Tab

For each queue, you can set Grade of Service (GOS) levels that enable Call Centre Managers to view real time, productivity and efficiency of their queues.

You can also establish the priority of a call depending on the length of time it has been queuing.



Grade of Service

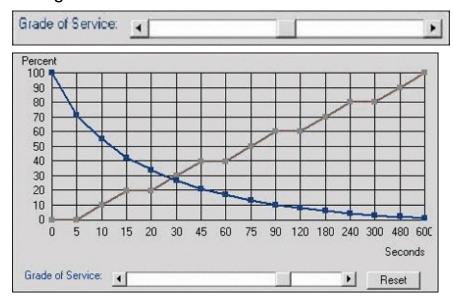
As a call stays longer in the queue, the grade of service will drop.

The example above states that all calls answered before 30 seconds receive 100% GOS, graduating down so that any call answered after 45 seconds gets 0% GOS.

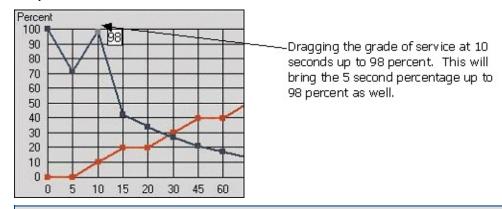
This enables supervisors at any one time to see how long on average it is taking for agents to answer calls.

To change the Grade of Service, click on the arrows to the left or right of

the slider button. The Blue Grade of Service line on the graph will change.



You can also change the Grade of Service by dragging one of the blue squares set on the 'X' axis lines up or down depending on your requirements.



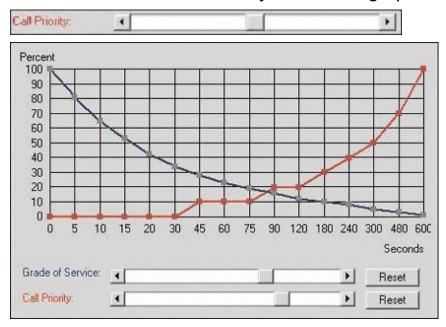
Note: GOS levels are not active in a Virtual Queue, they are only activated in a full blown Queue.

Call Priority

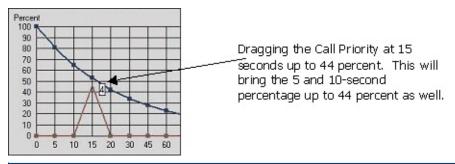
As a call stays longer in the queue it becomes more of a priority and will be pushed to the top of the queue.

If you have multiple agents in multiple queues and you want the calls to answer in one queue with a high priority, you can raise the priority by dragging the Red Call Priority line from 0 to 10.

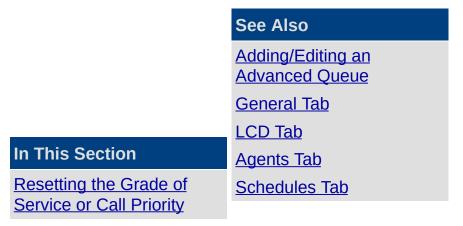
To change the Call Priority, click on the arrows to the left or right of the slider button. The Red Priority line on the graph will change.



You can also change the Call Priority by dragging one of the red squares set on the 'X' axis lines up or down depending on your requirements.



Note: Priorities can be activated in a Virtual Queue as well as a full blown Queue.



To change the X Axis Numbering for the GOS

Announcements Tab

Alarms Tab

Notes Tab

Preferred Agents Tab

Wildcards Tab

<u>Holidays Tab</u>

Permissions Tab

Resetting the Grade of Service or Call Priority

Click on the reset button beside the Grade of Service or Call Priority slider.



See Also

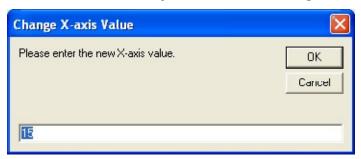
Priority / GOS Tab

To change the X Axis Numbering for the GOS

To change the X Axis Numbering for the GOS

To change the X Axis Numbering for the GOS Levels

- 1. Right click on the X Axis and Number you wish to change.
- 2. Enter the number you wish to change accordingly.



3. Click OK.

Your number on the graph will change.

See Also

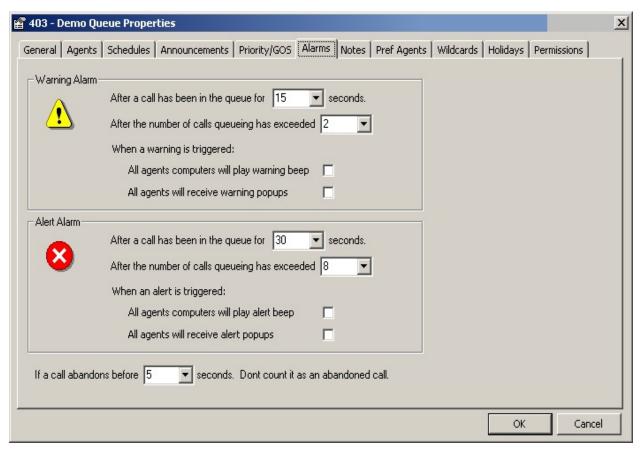
Priority / GOS Tab

Resetting the Grade of Service or Call Priority

Alarms Tab

Queue alarms alert PC users that calls are waiting in the queue and someone needs to log into the queue to answer them.

There is also the option to set time criteria for abandoned calls so that statistics are not over/under stated.



Setting alarms is a global setting.

It turns icons Yellow for warning and Red for Alert on all PCs.

The alarms have to be set on individual PCs as noted below.

Warning Alarm

The warning alarm will trigger when a call has been in the queue for a specified period or the number of calls queuing has exceeded the specified amount.

The queue line will turn yellow:

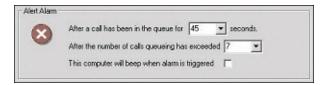


All agents computers will play a warning beep (this is activated by the

default machine's beep) - if deactivated, this will not sound.

All agents will also receive a warning popup on the bottom right-hand side of their screen.

Alert Alarm



The alert alarm will trigger when a call has been in the gueue for a specified period or the number of calls queuing has exceeded the specified amount.

The queue line will turn red:



The supervisor may decide to force some agents' computers to beep when the alarm is triggered. This is an individual setting that the agent cannot alter.

Note:

Warning and Alert times must be between 0-65535 seconds.

The alert settings must be greater than the warning settings.

Abandoned Calls



When a caller hangs up before the agent answers, this is classed as an abandoned call. The abandoned call time can be configured to suit your call centre.

I.e. If a call abandons prior to 5 seconds (or selected number of seconds), it is not counted as an abandoned call in real time statistics and reporting.

See Also

Adding/Editing an Advanced Queue

General Tab

LCD Tab

Agents Tab

Schedules Tab

Announcements Tab

Priority / GOS Tab

Notes Tab

Preferred Agents Tab

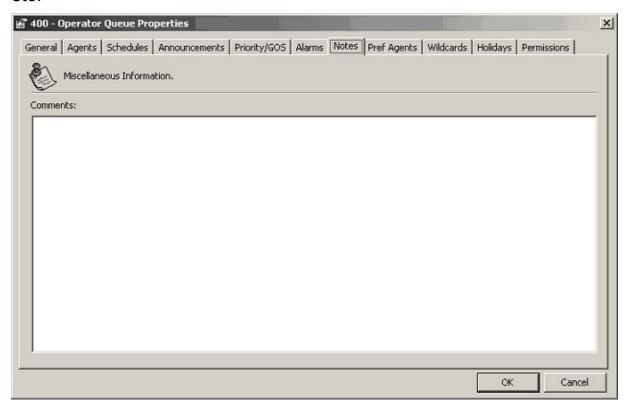
Wildcards Tab

Holidays Tab

Permissions Tab

Notes Tab

You can store any relevant information in the notes section. Ie., you may want to track history of adding staff, changing staff, changing Priorities, new company product/service promotions in conjunction with call centre etc.



Enter notes in the **Comments** pane.

Click OK.



Alarms Tab

<u>Preferred Agents Tab</u>

Wildcards Tab

Holidays Tab

Permissions Tab

Preferred Agents Tab

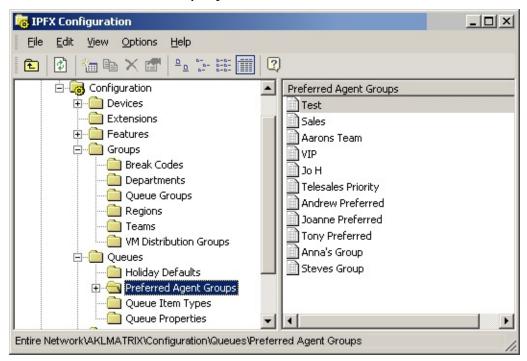
Preferred Agent Groups are used to promote better customer working relationships with Queue Agents. We can screen the calls by CLID (Calling Line ID) and/or account code login for when CLID is not effective. i.e. If number is withheld.

A Preferred Agent Group is usually set up per customer and is available for all queues. You must select the Preferred Agents for that group for each queue as a Sales Queue would have different agents from a Marketing or Support queue.

To associate a Preferred Agent Group with a customer use Company Contacts which contains the Company Account Code and CLID.

To access the Preferred Agents Screen use the path Configuration/Queues/Preferred Agents.

The screen below displays.



Adding/Editing an
Advanced Queue
General Tab

In This Section

To Add Agents to a Preferred Group

Last Agent Call Routing

What takes priority in the Last Agent \ Wildcard and Preferred Queue/Agent Routing Process?

LCD Tab

Agents Tab

Schedules Tab

Announcements Tab

Priority / GOS Tab

Alarms Tab

Notes Tab

Wildcards Tab

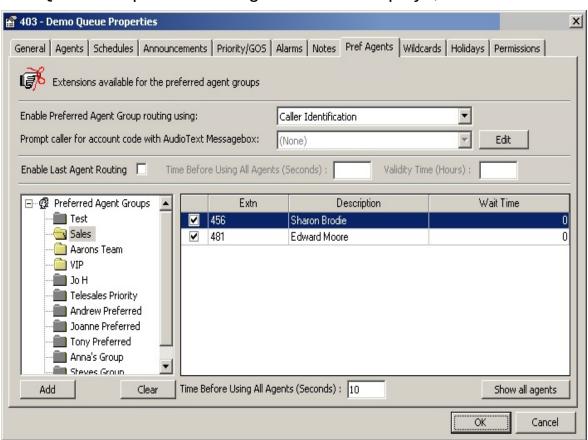
Holidays Tab

Permissions Tab

To Add Agents to a Preferred Group

- 1. Select the Preferred Agent Group you wish to set up by double clicking on the Group.
- 2. Right Click on the queue you wish to add your preferred agents to and select properties.
- 3. Select the Preferred Agents Tab from the Queue Properties Screen to set up rules that will apply to suit your queue environment.

The Queue Properties Pref Agents screen displays, as shown below.



Note: If the Preferred Agent Group is 'greyed out', this means that this Group is not in use within this Queue. If you wish to activate this Preferred Agent Group, double click and then proceed to add extensions to it.

How to use the fields to set up Preferred Agent Groups.

Enable Preferred Agent Group Routing using

This is set to None by default. You must select one of the following options to ensure that Preferred Agent Routing will operate:

- If you select Caller Identification from the drop box
 This ensures that when you enter a CLI within the Company
 Directory for a customer, the call is routed to a preferred agent.
- If you select Caller Identification and Account Code from the drop box

This ensures that when you enter a CLI and/or Account Number within the Company Directory for a customer, either the CLI and/or Account Number can be used to route the call through to the preferred agent.

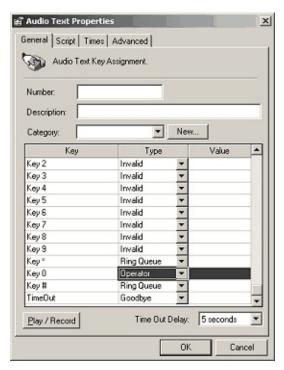
The selection of Caller Identification and Account Code will also enable the "Prompt Caller for Account Code with Audio Text Message Box" field. Select the required message from the drop-down menu.

The Account Prompt message will be played to all callers who come into the queue with an unknown CLI. This will be played prior to any queuing or queue announcements.

Click the **Edit** button beside the Prompt Caller for Account Code with Audio Text Message Box.



This will display the Audio Text Properties Screen.



This Message Box must be set up as per the diagram above with all key presses exact to operate.

- Key 1 to 9 Invalid
- Key * Ring Queue
- Key 0 Operator
- Key # Ring Queue
- Key Timeout Goodbye

When complete, select the Advanced Tab to complete Message Box settings:



- Select Enabled.
- Select CLID.
- Select the length of your account code from drop box or select variable if unknown account code length.
- Select Verification:
 - None Any value is accepted and it is sent through to the agent in the Screen Pop.
 - Call Centre This value is verified against the Company Directory of the IPFX product and sent through to the agent in the Screen Pop. Based on this verification, the call will be sent through to the Preferred Queue or Preferred Agent Group that this account number belongs to. This must be selected when using the Caller ID or Account Code option.
 - External This value is verified against an External Customer Database (please refer to your voicemail vendor as customisation is required). This requires custom development to be operable.
- Click OK.

Extn

This field shows the extension numbers belonging to the selected queue. Description This field is a description of the named user of the extension.

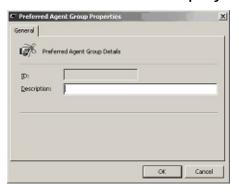
Wait Time

This field details how long you wish calls to wait for that agent before trying another agent in your Group. The wait time is accumulative, eg: the entire time the caller has been waiting.



Click this button to add a Preferred Agent Group to the system which will be available for all queues.

The screen below displays.



Enter new description.

Click OK.

Clear

Click this button to clear the Preferred Agents for the selected Queue.

The screen below will display.



Click **Yes** to clear, or **No** to cancel.

Time before using all agents

Check this box to display (in seconds) the time required to elapse before the call is diverted to another Agent (i.e. the Preferred Agent is unavailable).

This time is cumulative, eg: if the agent has calls routing to them at 10 seconds and then the time before using all agents is 30 seconds - the 30

seconds is the entire time the caller has been waiting, NOT, 30 seconds after the call was waiting at the Preferred Agent.

Show all agents

Shows all extensions that are part of the queue, so that you can select who you want in the Preferred Agents group.

Note: Each queue can use the same Preferred Agent Group with different agents in them as they are queue specific. ie: This is per queue only and you can have multiple agents in multiple groups.

Tip To route a call through to a Preferred Agent, the agent must be part of a queue if you do not wish them to take normal queue calls, then ensure you select them to be on Auto access with a Start Time of Never and a Start Count of Never.

See Also

Preferred Agents Tab

Last Agent Call Routing

What takes priority in the Last Agent \ Wildcard and Preferred Queue/Agent Routing Process?

Last Agent Call Routing

Last Agent Routing enables customers who have just been on the phone with an agent, to call back and go immediately to the same agent instead of to another person who is not aware of their conversation.

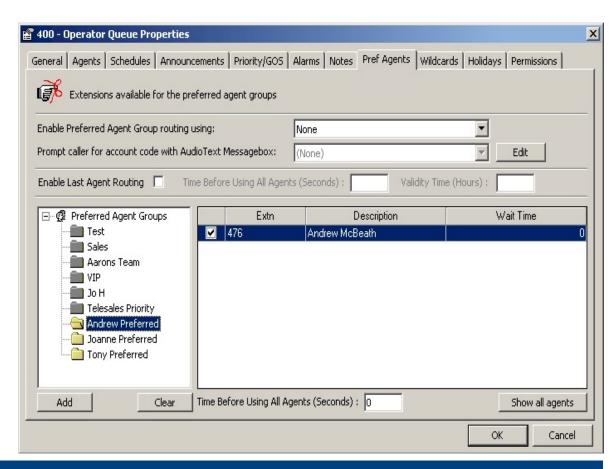
This feature can be set for a time frame, eg: please route all customers to the last agent they spoke with if they call within 4 hours.

You can also ensure that your customer will only wait for a certain number of seconds for the last agent they spoke with before routing to other agents in the queue to answer their call.

Note: If the customer call is routed to a queue using the Wildcard Preferred Queuing option, the last agent routing will not operate - this only operates for customer calls routed to a queue using the Preferred Queuing option.

To Set Last Agent Routing

- Select the checkbox Enable Last Agent Routing
- 2. From the **Enable Preferred Agent Group Routing using:** drop-down menu, select **Caller Identification**.
- 3. Enter the time you wish for your customer to ring and wait for the last agent they spoke with before routing through to all agents within the queue in the Time Before Using All Agents (seconds) field.
- 4. Enter the time you wish for your customers to go through to the last agent they spoke in the Validity Time (Hours) field, eg: should Customers call within 4 hours, please send through to the last agent they spoke with.



See Also

Preferred Agents Tab

To Add Agents to a Preferred Group

What takes priority in the Last Agent \ Wildcard and Preferred Queue/Agent Routing Process?

What takes priority in the Last Agent \ Wildcard and Preferred Queue/Agent Routing Process?

When using Preferred Queueing, Preferred Agent Routing, Preferred Wildcard Routing and Last Agent Routing, you need to be aware of what feature is activated first.

If you are using all features in conjunction with each other, please note that the system will abide by the instructions set in the following order:

1st priority	Preferred Queuing by CLI
12nd priority	Preferred Queuing by Wildcard Note: In this option the Last Agent Routing will not operate
3rd priority	Preferred Agent by Last Agent Routing
4th priority	Preferred Agent by CLI
5th priority	Preferred Agent by Wildcard

See Also

Preferred Agents Tab

To Add Agents to a Preferred Group

Last Agent Call Routing

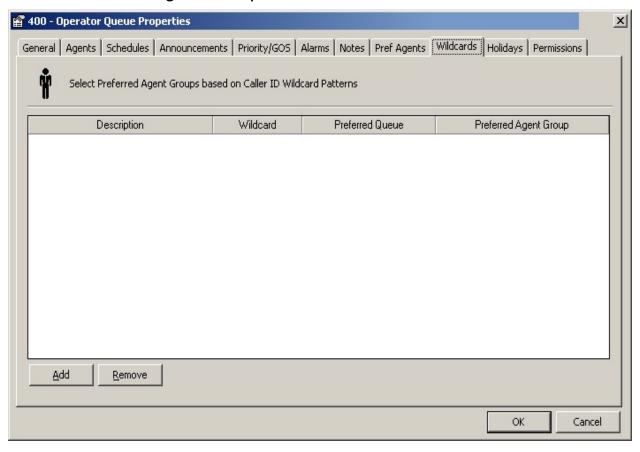
Wildcards Tab

Wildcards provides you with an option to take calls from regional areas and send them to a Preferred Agent Group.

ie: if anyone calls from a region starting with a CLI of 09457* route them to this Preferred Agent Group.

Note: This is based on CLI (Calling Line ID).

Select Preferred Agent Groups based on Caller ID Wildcard Patterns.



To use this feature

- 1. Display the Properties Screen, Click the Wildcards Tab. The screen above displays.
- 2. Click on Add.
- 3. Double click in the Description Column.
- 4. Enter your description e.g. Auckland Sales.

- 5. Click on the Wildcard column.
- 6. Enter the numbers you wish to route calls from, followed by a * e.g. if from Auckland enter 09*, if Wellington 04*, if Auckland/Howick Suburb enter 0953*.
- 7. Click in the Preferred Queue column.
- 8. Select your Preferred Queue from the drop-down menu.
- 9. Click in the Preferred Agent Column.
- 10. Select your preferred Agent group from the drop-down menu.
- 11. The ID (far-right) auto-adds the Agent's number but this can be edited.
- 12. Click OK.

Wilcard Options

Wildcards utilise the Microsoft Wildcard options, enabling the use of the 'Like' operator to find values in a field that match the pattern you specify, eg: you can use wildcard characters to find a range of values (for example, Like "09*").

The following example returns data that begins with the digit 7 followed by any digit between 2 and 4 and three digits:

Like "7[2-4]###"

The following table shows how you can use Like to test expressions for different patterns.

Kind of Match	Pattern	Match (Returns True)	No Match (Returns False)	Comment
Multiple Characters	1*4 *2*	124,1234,125674, 1234, 552555,	156, 2564 5553	Any number that starts with a 1 and ends with a 4. Any number which contains a 2
Single Digit	1#4	124,134,164	1234	Single Digit
Range of Characters	[2-7]	3, 5, or a 7	1, 8 or 9	Represents one number - can use this command multiple times
Outside a	[!2-7]9	19, 89, 99	39, 49 or 55	Represents one number outside of the range within

Range				the brackets and can be used multiple times.
Combined	*[!1-3]#[5-8]##	240566, 3340566, 678940566	1//9///	Combining Wildcard characters

See Also

Adding/Editing an Advanced Queue

General Tab

LCD Tab

Agents Tab

Schedules Tab

Announcements Tab

Priority / GOS Tab

Alarms Tab

Notes Tab

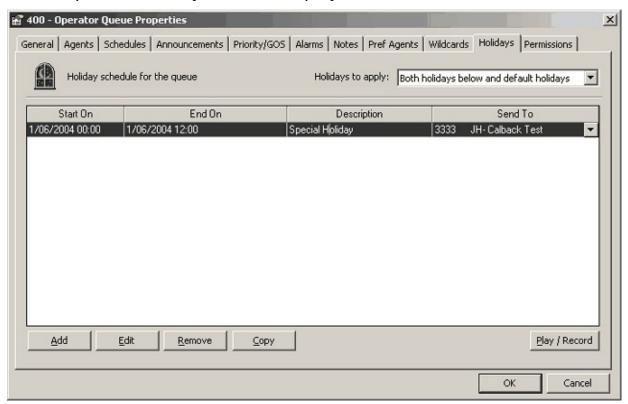
Preferred Agents Tab

Holidays Tab

Permissions Tab

Holidays Tab

This is where you can set up holidays that apply to this queue only. Use the path Configuration/Queues/Queue Properties/Holidays Tab. The Properties/Holidays screen displays.



To Add a Holiday

- 1. Click on the Add button. A new line displays across the screen.
- 2. Double click in the **Start On** column.
- 3. Select the Date and Time from the Date Time Picker screen which displays.
- 4. Double click in the End on Column from the Date Time Picker screen which displays.
- 5. Click in the Description column.
- 6. Enter the Description, e.g. Christmas Day.
- 7. Click on the drop-down menu arrow and select the message you wish your callers to receive.

8. Click OK.

Holidays To Apply

- Default Holiday Schedule use main Holidays
- Holidays Listed Below Use Holidays listed in the form
- Both of above Use both Holidays in the Form and on the Default Schedule (uses the Holidays form first, then Default)

A description of fields on the Holidays tab follows:

Start On

Select the start on date and time from the Date time Picker screen shown below.



End On

Select the end on date and time from the Date time Picker screen shown above.

Description

Enter the description of the Holiday, e.g. Christmas Day.

Send To

- Click on the drop-down menu arrow to display the available Audio Text Message Boxes.
- Select required Message Box.



To Play/Record the Holiday Message

Play / Record

- 1. Click the Play/Record button to listen to your message.
- 2. Your phone will ring giving you the options of:
 - Select 1 to listen, or 2 to record.
- 3. Click **OK** when satisfied.

Note: If you wish to set up a Holiday Default that changes all queues, please refer to Holiday Defaults.

See Also

Adding/Editing an Advanced Queue

General Tab

LCD Tab

Agents Tab

Schedules Tab

Announcements Tab

Priority / GOS Tab

Alarms Tab

Notes Tab

Preferred Agents Tab

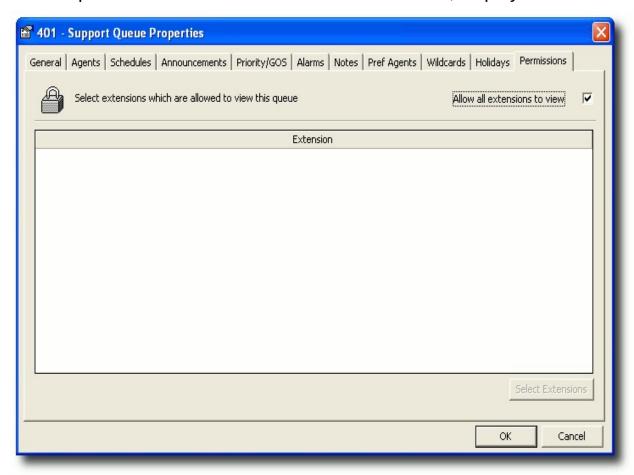
Wildcards Tab

Permissions Tab

Permissions Tab

This feature gives Supervisors/Administrators the ability to select which extensions may have access to view this Queue.

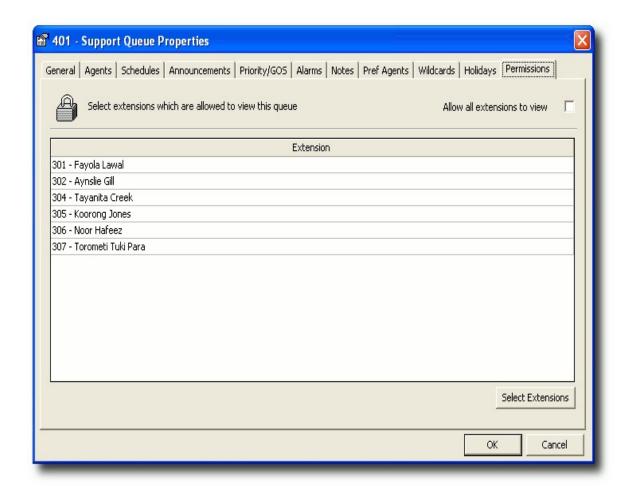
Use the path Configuration/Queues/Queue Properties/Permissions Tab. The Properties/Permissions screen as shown below, displays.



Note: The Allow all extensions to view checkbox is checked by default, and the Select Extensions button is disabled.

How to add extensions

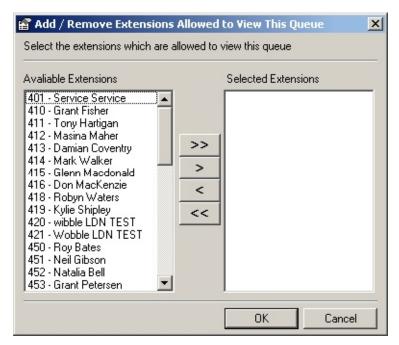
1. Clear the Allow all extensions to view checkbox.



This will enable the Select Extensions button.

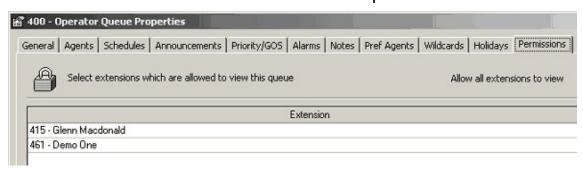
2. Click the **Select Extensions** button.

The Add/Remove Extensions Allowed to View This Queue screen displays.



- 3. Select the required extension/s using the move buttons.
- 4. Click OK.

The selected extension numbers will then appear in the Selected Extensions which are allowed to view this queue window.



See Also

Adding/Editing an Advanced Queue

General Tab

LCD Tab

Agents Tab

Schedules Tab

Announcements Tab

Priority / GOS Tab

Alarms Tab

Notes Tab

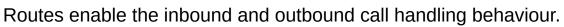
Preferred Agents Tab

Wildcards Tab

<u>Holidays Tab</u>

Routes





Dial Plan



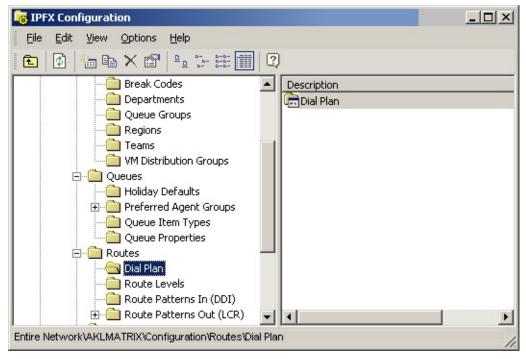
PBX Dependent Feature!

Dial Plans are a way of defining what number is assigned to specific features within the system for Cisco 7960s, 7940s, 7905 and ATA Devices.

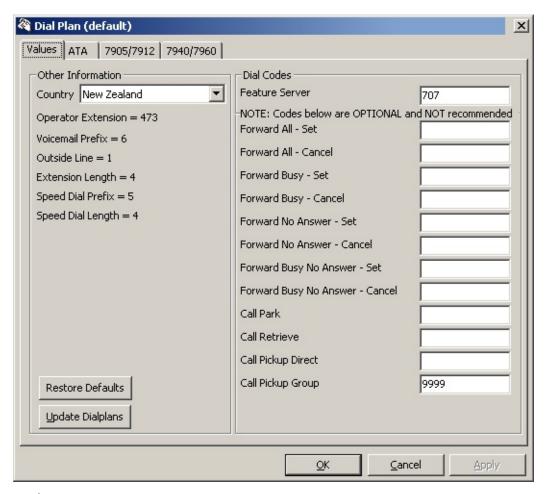
IPFX sources this Dial Plan to ensure it dials the correct codes to reach a destination.

To set a Dial Plan

- 1. Select Configuration.
- 2. Select Routes.
- 3. Select Dial Plan.
- 4. Double click on the Dial Plan, or right click and select properties.



5. Select the country of origin from the drop-down menu.



6. Select OK.

The Dial Plan is automatically generated when you select OK.

The Other Information on the left hand side of the Dial Plan is generated as follows:

Operator Extension	Config\Devices\Settings\Servers
Voicemail Prefix	Config\Features\Call in Control, e.g: 61
Outside Line	Config\Devices\Settings\Servers
Extension Length	Config\Devices\Settings\Servers
Speed Dial Prefix	Driven from Config Wizard initial setup
Speed Dial Length	Driven from Config Wizard initial

setup	
-------	--

The Config Wizard and the Other Settings must be entered prior to setting up the Dial Plan.

On the right hand side of your screen within the Dial Codes, a * will be entered beside the Feature Server - this is automatically generated and will activate the Feature Server codes on the Phone.

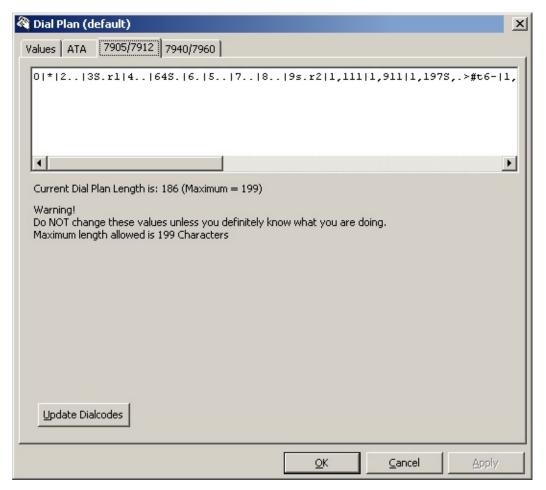
If you do not wish for the Feature Server to be active, you can take the * out from the Feature Server and enter your own Dial Codes. Please refer to Feature Server (see "" on page 164)

Note: We recommend you use the IPFX Defaults as per the screen above due to constraints in IP phone lines and ordering.

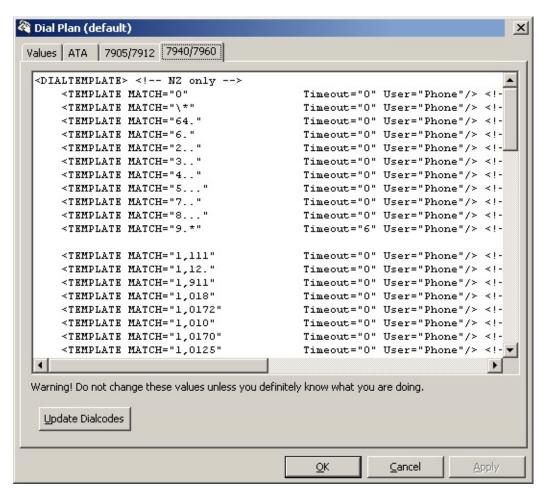
If you wish to adjust the Dial Plans manually, please refer to the CISCO SIP IP Phone Administrators Guide Version 4.2 from the Cisco Website for 7940, 7960s and the Cisco ATA 186 and Cisco ATA 188 Analog Telephone Adaptor Administrators Guide (SIP) (2.15, Rev B0) as the Dial Plan uses the first matching selection.

The IPFX Dial Plan tool is to be used as a guide only.

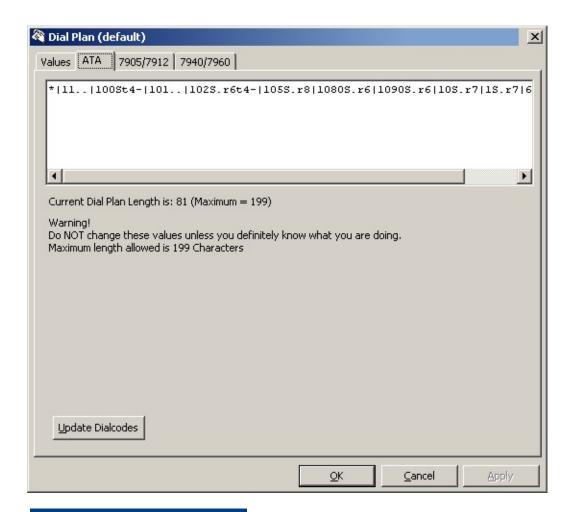
The 7905/7912 Dial Plan is created in the VM\TFTP\dialplan.xml directory.



The 7940/796060 Dial Plan is created in the VM\TFTP\dialplan.xml directory.



The ATA is updated in the new ATA.cfg directory, with a one line parameter of the Dial Plan as shown in the screen example below.



Routes Route Levels Route Patterns In (DDI/DID)

Route Patterns Out (LCR)

Route Levels

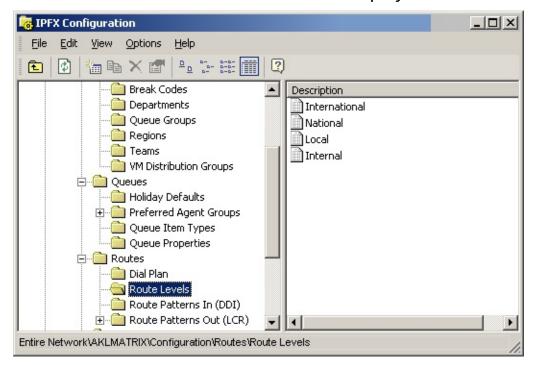


PBX Dependent Feature!

Route Levels provide the ability to assign different levels of access to groups of phones, eg: some can dial international, some can dial local, etc.

To Add a New Route Level

- 1. Select Config from the Toolbar.
- 2. Select Routes.
- 3. Select Route Levels. The screen below displays.



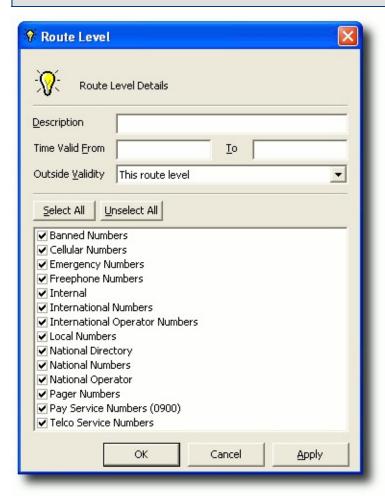
4. Right Click in the Description window to display the short cut menu, as shown below.



Select New Route Levels.

- 6. Enter Description i.e. Local, International.
- 7. Enter Time Valid From and To in the fields.
- 8. Select required Validity from the Outside Validity drop-down menu.

Note: All Toll Classes have a start and end time with an alternative route level outside these times. When alternate is used validity time checking will not apply. On creation the alternate defaults to the correct route level ie the route level applies regardless of times set.



- 9. Use the Select all or Unselect all buttons to check/uncheck the boxes,
 - or manually Select/Unselect individual items as required.
- 10. Select Apply and then OK.

To Edit a Route Level

- 1. Right Click on the required Route Level to display the short cut menu.
- 2. Select Properties. The Properties Screen displays.
- 3. Alter fields as required. (Field instructions as in Add a Route Level).
- 4. Click OK.

Note: Description: Time Valid From and To are generated automatically.

See Also

Routes

Dial Plan

Route Patterns In (DDI/DID)

Route Patterns Out (LCR)

Route Patterns In (DDI/DID)

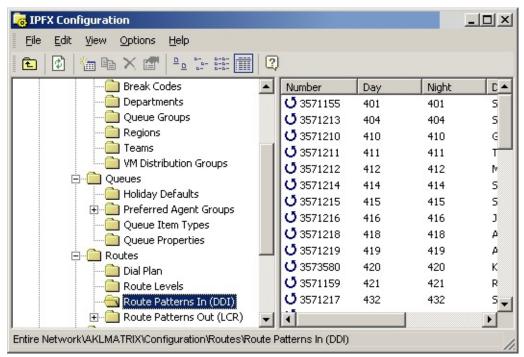


PBX Dependent Feature!

Route Patterns In (DDI/DID) provide the ability to map an inbound number to an internal extension number.

To Enter a DDI/DID

- 1. Select Configuration from Toolbar.
- 2. Select Routes.
- 3. Select Route Patterns In (DDI/DID)

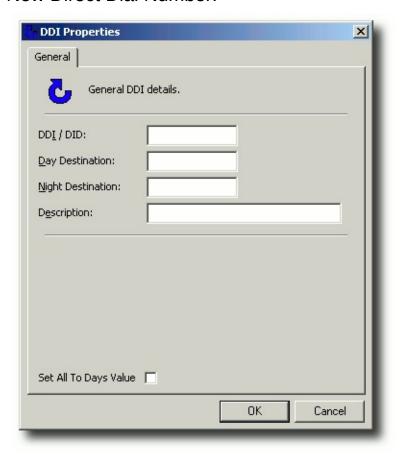


4. Right click on right hand side of screen to display the short cut menu.

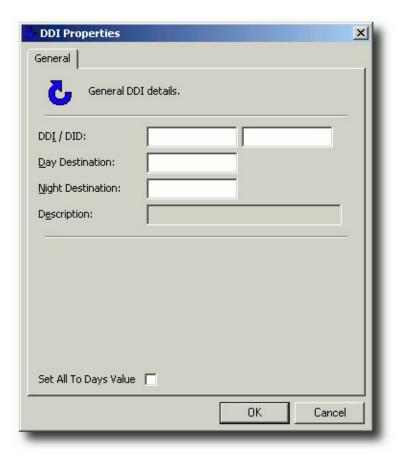


 Select New Direct Dial Number to add an individual DDI Number, or New Direct Dial Number Block to enter a block of DDI Numbers.
 The DDI Properties Screen displays.

New Direct Dial Number:



New Direct Dial Number Block:



- 6. Enter the DDI/DID and if a block, enter the start and end DDI/DIDs.
- 7. Enter the Day Destination.
- 8. Enter the Night Destination.
- 9. Enter Description in the Comments field eg: a text field to label the pattern.
- 10. Click OK.

Set All To Days Value

Check this box for data in Night Destination to be entered simultaneously as Day Destination. You will not be able to alter any data in the Night Destination when this box is checked.

If the box is unchecked, data can be entered directly into each field.

To Edit an Existing DDI

- 1. Follow Instructions 1 to 4 above.
- 2. Select Properties.

- 3. Make amendments as required.
- 4. Click OK.

See Also

Routes

Dial Plan

Route Levels

Route Patterns Out (LCR)

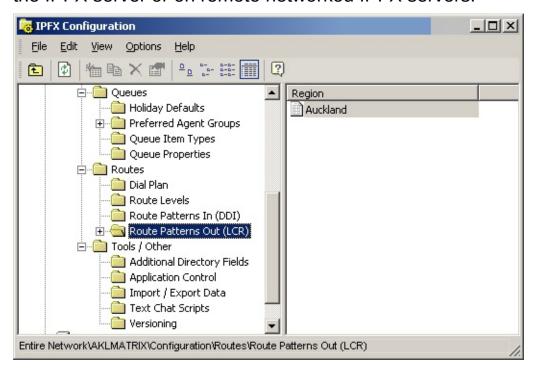
Route Patterns Out (LCR)



PBX Dependent Feature!

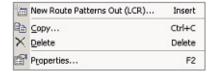
Route Patterns Out (LCR) provides the ability to modify outbound calling behaviour. IPFX uses LCR (Least Cost Routing) to determine the preferred route for the destination.

Route patterns are used when the dialled number is not found locally on the IPFX server or on remote networked IPFX servers.



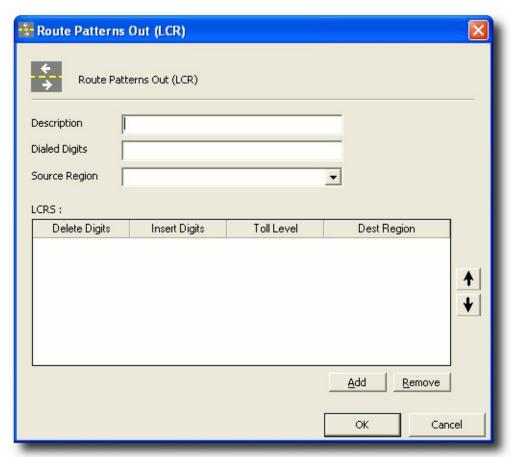
To enter a Route Pattern Out (LCR)

- 1. Select Configuration from the Toolbar.
- 2. Select Routes.
- 3. Select Route Patterns Out (LCR).
- 4. Right click on the right hand pane to display the short cut menu.



5. Select New Route Patterns Out (LCR). The Route Patterns Out

(LCR) screen displays.



- 6. Enter Description text field, eg: Sydney Local Calls. (See populated example below.
- 7. Enter Dialled Digits the digits dialled to reach the destination, eg: From Auckland to an Australia Number the dial prefix would be 10061* (note that the * denotes any number of trailing digits).

In the Dialled Digits field it is possible to enter patterns such as :

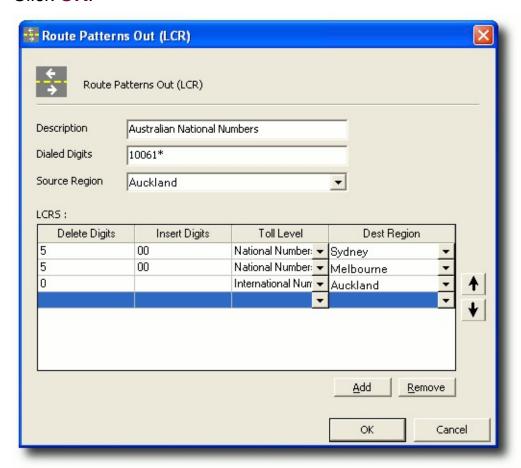
4X* (4 followed by any amount of digits)

4[0-5]XX67233XXX (4 followed by 0-5, followed by any 2 digits, followed by 67233, followed by any 3 digits).

Characters can be matched and inserted - e.g. #0X (#followed by one character).

- 8. Select Region from the drop-down menu.
- 9. Delete Digits Enter a number in this field i.e. 5 will delete the first 5

- numbers in the Dialled Digits field or in our example above it would delete the 10061 from the dialled number.
- 10. Insert Digits Enter a number in this field to prefix the number you are dialling from the local region to make it suitable for dialling through the remote gateway, i.e. in our example 00.
- 11. Select Toll Level from the drop-down menu Note this determines the Toll Level to be applied when the call is delivered by this region.
- 12. Select Destination Region from the drop-down menu. Select a region which can have one or more gateways associated with it to convert this data traffic to a Public Telephony Network (PSTN) call.
- 13. Use the Up and Down Arrows to order the priorities from top to bottom. This details what order the gateways are consulted in an attempt to deliver the call.
- 14. Click OK.



Note: To call Sydney from Auckland, use the Sydney Region which

equals a local call when connected. If the Sydney Region is not available, choose Melbourne or Brisbane as a second/third choice. This is still cheaper than calling from Auckland using PSTN.

Note 2: If the Melbourne Region has a relationship to the Sydney Region and the Auckland Region does not, then the Auckland Server evaluates this and can utilise a direct network link to Sydney to get to Melbourne if required.

To Edit a Route Patterns Out (LCR)

- 1. Follow Steps 1 to 4 above.
- 2. Select Properties. The Properties screen displays.
- 3. Make any amendments as required.
- 4. Click OK.

See Also

Routes

Dial Plan

Route Levels

Route Patterns In (DDI/DID)

Tools/Other

For further information please refer to the or your PBX Vendor (Reseller).

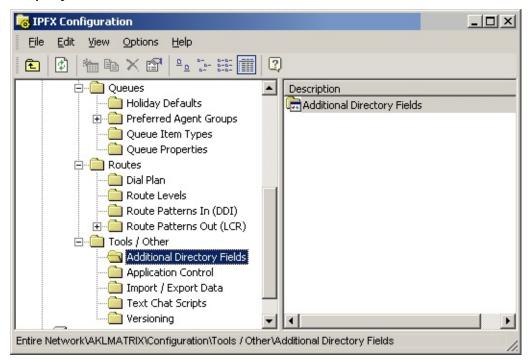
Additional Directory Fields

The customised directory is not a customisation of all columns in the directory, but it allows you to add additional fields to the directory.

This is set up on the server, which means that any client connected to this server will see these extra columns.

To change the directory column format

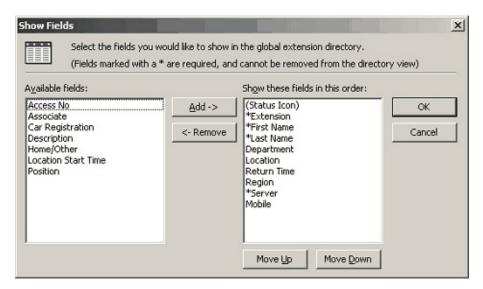
- 1. Select Config from your main Toolbar.
- 2. Select Tools/Other/Additional Directory Fields. The Screen below displays.



3. Right Click on the right hand side of the screen to display the short cut menu. The screen below displays.



4. Select Properties. The Show Fields Screen shown below displays.



- 5. Use the Add Remove buttons to select/deselect items from the list.
- 6. Use the Move Up or Move Down buttons to change the order of the Field order.
- 7. Click OK.

Note: For further information on using Directory and applying Filters for the Directory, please refer to the User Guide.

See Also

Tools/Other

Application Control

Import Data

Text Chat Scripts

Versioning

Application Control

In This Section

<u>Call Admission Controls</u> <u>View Server Details</u>

See Also

Tools/Other

Additional Directory Fields

Import Data

Text Chat Scripts

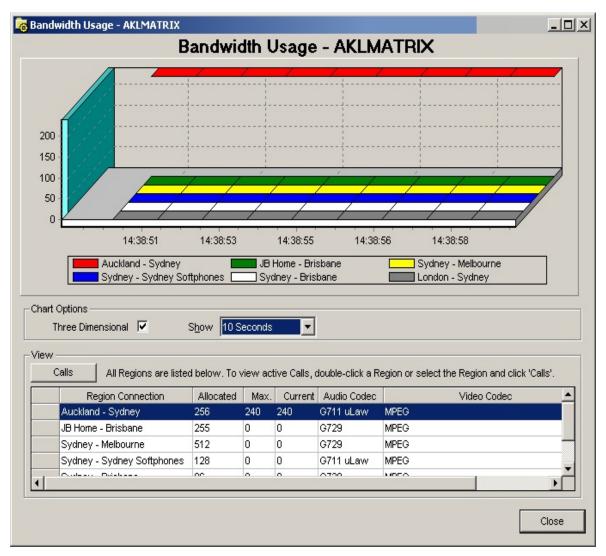
Versioning

Call Admission Controls

If you have Region to Region links set up, you have the ability to monitor or view activity of these links. See Configuration\Groups\Regions for further information on how to set up these links. This controls how many calls go across the data link and ensures that calls do not suffer from packet loss, i.e. 256k allows four calls at 64k (G711) and, after that time, calls will route across the PSTN.

How to view Call Admission Controls

- 1. Use the path Configuration\Tools / Other\ Calls Admission Control Details.
- Double Click on Calls Admission Controls.The screen below displays.



- 3. You can choose how you view the screen by selecting from Chart Options:
 - Three Dimensional Check/Unchecked as required.
 - Show Select time frame to view from the drop-down box.
 View:
 - Summary shows the Region to Region links and their associated properties.
 - Call Details shows the current calls for a selected link.
 Click the Reset All button to -
 - Re-query the database and PBX Server
 - Refresh all Region and Call details.

4. Select **Close** when satisfied.

See Also

Application Control

View Server Details

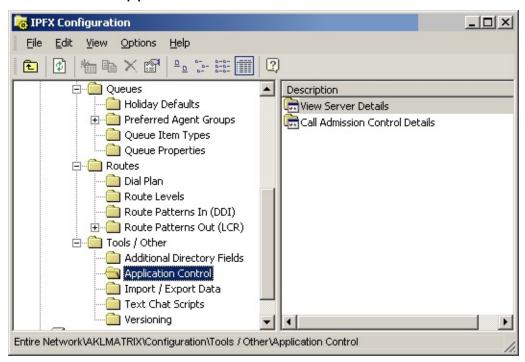
View Server Details

This function provides an Administrator with control over the Server applications.

(See Server Site documentation).

Path Configuration/Tools Other.

Click on the Application Control Folder.



Double Click on the View Server Details icon. The Server Application Screen displays.



From left to right -

Add a server application

- Remove a server application(s)
- Start applications
- Stop applications
- Restart applications
- Force a terminate
- Select all applications
- Unselect all applications
- Set Trace Levels
- Delete all log files
- Set the restart on dead time for selected apps
- Refresh Windows

Note: Use extreme caution. Only enable this as a feature for Administrators who configure the server.

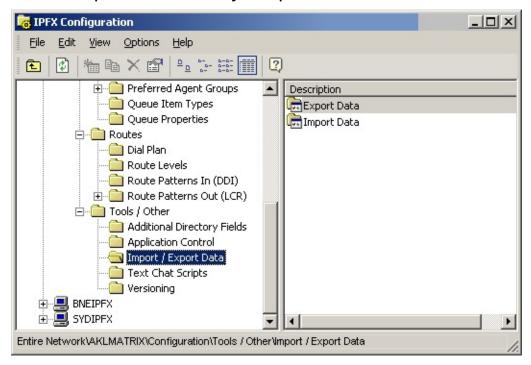
See Also

Application Control

Call Admission Controls

Import Data

This item provides a facility to upload Excel files.



To export data

1. Right-click **Export** Data to display the shortcut menu, i.e.



- 2. Click on **Properties** to display the CSV Data Export screen.
- 3. Select whether you want to export Extensions or Contacts, i.e.



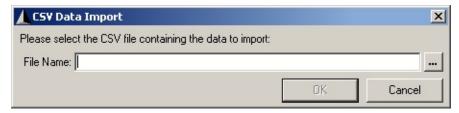
4. Select **OK** then follow prompts to save as a .csv file.

To upload an imported file

1. Right-click Import Data to display the shortcut menu, i.e.



2. Select Properties. The CSV Data Import screen displays.



- 3. Select the drop-down box of File Name to browse and find the Spreadsheet you wish to Import.
- 4. Select OK.

Note: Ensure you have set up your template accurately before importing - refer to Import Data Templates.



Import Data Templates

You can use existing in-house data and enter it into either of these spread sheets.

IPFXImportTemplate.xls

ImportTemplate.xls

Note: Use IPFXImportTemplate.xls for IPFX sites only, and ImportTemplate.xls for all other sites.

To set up a template

Divide the spreadsheet into four sections as noted below.

- Departments
- User Feature Levels
- Extensions

Populate Import Template Spread Sheet.

Departments

Field	Description
Description	Enter Department description (for example: Sales, Marketing).

User Feature Levels

Field	Description	
User Level	Enter description A drop down box application Select the Base Us	•
Base User Level	User Feat	ture Levels
	Jeon Level	User Supervisor Administrator

Extensions

Field	Description
Extension	Enter extension
First Name	
Last Name	
Email	
LCD Name	Name that appears on the telephone screen LCD display (Dterm only for NEC).
Title	Enter Title
Position	Enter Position
Notes	Enter relevant notes
Department	This field has a drop-down box which related to previously entered Department information. Select the required department.
User Feature Level	Select the required User Feature Level from the drop-down box.
Object Type	This is the phone type; select from the drop-down box.
Region ID	Enter an RegionID as found under the Groups, Regions, Number column. If no RegionID is given the Extension will be allocated to the Local default RegionID of the server.

Direct Dial Numbers



PBX Dependent Feature!

Note: There is a Name Box feature in the top left corner of the Spread Sheet. This has a drop-down menu which provides short cut access to other sections. Select your required section for immediate access to that section.

- 1. Open the Name feature box and select Direct Dial Numbers.
- 2. Enter the description information for the fields.

Field	Description
Number	Enter Direct Dial number
	Enter day destination

Day Destination number

Night Destination Enter night destination

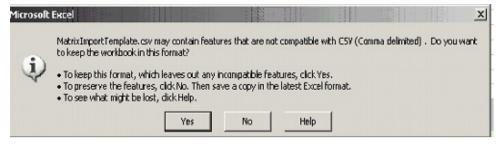
number

Comments Enter any usesful

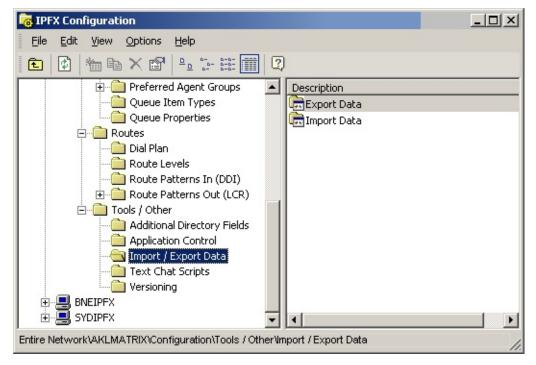
comments

To save file template

- 1. File > Save As.
- 2. Save as .csv file (comma delimited)
- 3. The Microsoft Warning Screen will display.



- 4. Select Yes
- 5. Save as .csv (comma separated values).
- 6. On exit you will be asked to Save again.
- 7. Select No.
- 8. Click on the Config icon on the Top Toolbar.
- 9. Navigate the path Configuration/Tools Other/Import Data.
- 10. Double click on Import Data in the right hand window.



11. The CSV Data Import Screen displays.



- 12. To enter File Name on Screen, (or browse to required .csv file).
- 13. Click OK.
- 14. Import Successful Screen displays.



15. Click OK.



Exporting Data

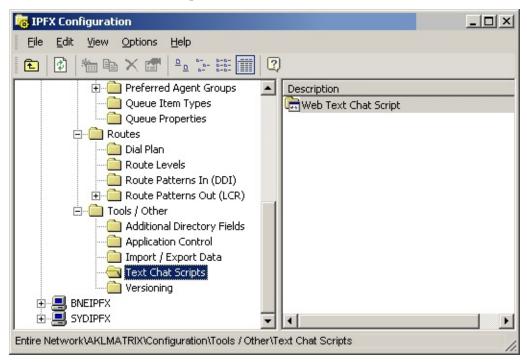
Using the Export button on the CSV Data Import screen.



Click the Export button to export the current servers, regions, departments, user levels, extensions, Direct Dial numbers, Preferred Agent Groups, Company Contacts to a .csv file which can be used as a back up which can then be imported to any server.

See Also Import Data Import Data Templates

Text Chat Scripts



Please refer the seperate Text Chat User Guide.

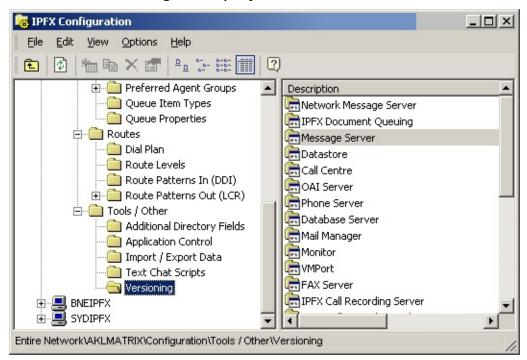


Versioning

Click on the Versioning folder to display a list of the Server applications and their version numbers.

Path: Configuration/Tools/Other/Versioning

Click on Versioning to display the list.



Note: This is an example only and the Description and Version Number details will change based on PABX Type and Version Releases.

See Also

Tools/Other

Additional Directory Fields

Application Control

Import Data

Text Chat Scripts

IPFX Authority Levels

There are three user levels within IPFX Client.

Each level (User, Supervisor, Administrator) allows access to different options.

User Level	
	Location options *
	Setting your location
	Setting Call Profiles
	Changing other extension locations
	Viewing/changing your location setting preferences
	Voicemail Message options
	Listening to your own messages
	Accessing various message types (inbox, saved and deleted)
	Playback Controls (replay, return call, save, delete etc.)
	Send a voicemail message
	IPFX Manager Directory options
	Viewing other extension locations toolbar, directory
	Viewing/dialing from the internal directory
	Viewing/dialing from the company directory
Voicemail User ability	Adding/dialing a new contact to your Personal directory
	Telephone Functions
	Answer/hang-up/dial/transfer functions
	Dialing an extension (using your side toolbar)
	Answering a ringing extension (in your sidebar)
	General Sidebar and Top Toolbar options

	Changing the side bar icon sizes (from large to small) Adding/removing/renaming folders and extensions from side bar
	Opening/accessing another persons voicemail (using your sidebar if you know the password)
	Recording a conversation (if enabled)
	Accessing your own properties
	Recording personal greetings
	Viewing/setting up your Voicemail mailbox phone numbers
	Viewing/setting up your Voicemail mailbox preferences
	Personal distribution groups
	PC Client Configuration
	Linking IPFX PC Client to your desk telephone
	Changing the icon sizes from large to small
IPFX Client Options	Enable/disable popup call information screen
IFFA Client Options	Password administration on own extension
	Personal window view
	Tool bar view style options
	Keyboard functionality (function keys)
	Extension Properties
	Log in and out of queues
Call Centre ability	Viewing of overall queue statistics (on screen only)
	Viewing of agent performance and call flow
	Work Time Allocation.

Call Centre Supervisory ability

Supervisor Level	
	Location options

Setting your location

Setting Call Profiles

Changing other extension locations

Viewing/changing your location setting preferences

Voicemail Message options

Listening to your own messages

Accessing various message types (inbox, saved and deleted)

Playback Controls (replay, return call, save, delete etc.)

Send a voicemail message

IPFX Manager Directory options

Viewing other extension locations (toolbar, directory)

Viewing/dialing from the internal directory

Viewing/dialing from the company directory

Adding/dialing a new contact to your personal directory

Telephone Functions

Answer/hang-up/dial/transfer functions

Dialing an extension (using your side toolbar)

Answering a ringing extension (in your sidebar)

General Sidebar and Top Toolbar options

Changing the side bar icon sizes (from large to small)

Adding/removing/renaming folders

Adding/removing an extension from your side bar

Opening/accessing another persons voicemail (using your sidebar if you know the password)

Recording a conversation

Accessing your own properties

Recording personal greetings

Voicemail Supervisory ability

	Viewing/setting up your Voicemail mailbox phone numbers Viewing/setting up your Voicemail mailbox
	preferences Personal distribution groups
IPFX Client Options	PC Client Configuration Linking IPFX PC Client to your desk telephone Changing the icon sizes from large to small Enable/disable popup call information screen Password administration on own extension Personal window view
	Tool bar view style options Keyboard functionality (function keys)
	Extension Properties Log in and out of queues Viewing of overall queue statistics (on screen only) Viewing of agent performance and call flow Work Time Allocation. System Configuration Call Centre Properties (Add/Edit/Delete) Queue Creation Queue Configuration Agent Selection (Add/Edit/Delete) Queue Opening/Closing Scheduling (Add/Edit/Delete) Queue Message Box (Add/Edit/Delete) Queue Announcements (Add/Edit/Delete) Queue Priority/GOS Graph Queue Permissions tab (off by default) Warning Alarms Queue Groups

	Queue Teams
	Wrapup Codes
Call Centre Supervisory	Queue control (Open/Reset/Forward to Messaging)
ability	Reporting access to:
	CALLS
	Total Calls activity
	Incoming calls report
	Outgoing calls
	Call type by extension summary
	DDI
	DDI Summary Abandoned
	DDI summary
	DDI Summary Answered calls
	EXTENSION
	Location by extension
	Daily locations by extension
	Location summary
	Location by extension summary
	MESSAGE BOX
	Total message box activity
	Overall message box action
	Overall message box action
	Overall message box summary
	Message box summary

Voicemail Administrator ability

Administrator Level	
	System Configuration
	Audio Text/Message Box (Add/Edit/Delete)
Voicemail	Call In Control (Add/Edit/Delete)

Administrator ability	Extension Properties (Add/Edit/Delete) Department and Company Groups (Add/Edit/Delete)
	System Configuration
	Call Centre Holiday (Add/Edit/Delete)
	Call Centre Queue Properties (Add/Edit/Delete)
	Queue Creation
Call Centre	Queue Properties/Configuration
Administrator ability	Trunks (Viewing)
	Queue Groups (Add/Edit/Delete)
	Queue Teams (Add/Edit/Delete)
	Wrapup Codes (Add/Edit/Delete)
	Access to all Reports

Hunt groups

PBX Dependent Feature!

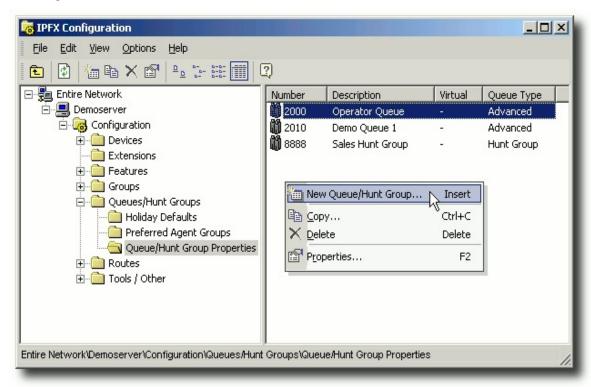


Creating a hunt group

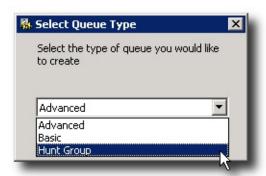
Note: Hunt groups are only available if the Hunt Group user feature level has been enabled on your IPFX system.

To create a new hunt group:

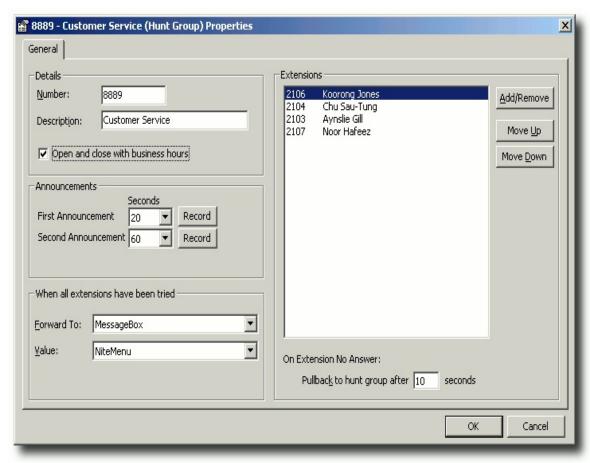
- 1. Click the **Config** button in your IPFX client.
- 2. Browse to Configuration > Queues/Hunt Gruops > Queue/Hunt Group Properties.
- 3. Right click inside the panel to the right, and select **New Queue/Hunt Group** from the context menu:



4. Select **Hunt Group** from the combo box that appears:



5. The Hunt Group configuration screen appears:



Complete the fields of this screen as follows:

- 1. **Number:** Enter the virtual extension number that you wish to use for the Hunt Group.
- 2. **Description:** Enter a name for the Hunt Group.
- 3. Open and close with business hours: Check this box to have the Hunt Group automatically open and close according to the

system's default business hours (Configuration > Devices > Servers > Settings > Voicemail). While the Hunt Group is closed, calls are diverted to the Night Menu.

If this box is left unchecked, the Hunt Group will remain permanently open.

- 4. **First Announcement:** Select number of seconds after which the first announcement (if any) will be played, and click **Record** to record the announcement.
- Second Announcement: Select number of seconds after which the second announcement (if any) will be played, and click Record to record the announcement.
- 6. Forward To: Choose what will happen to the call after all agents in the hunt group have been tried.
 - None The system attempts to deliver the call to the same hunt group again, starting over with the first agent.
 - Queue/Hunt Group The system delivers the call to a queue or to another hunt group. Select the specific queue or hunt group from the Value menu, below.
 - MessageBox The system delivers the call to a message box. Select the specific message box from the Value menu, below.
- 7. **Value** Select the queue, hunt group or message box to which the call will be delivered if it is not answered by any hunt group agent. Used in combination with the **Forward To** option, above.
- 8. **Agents:** Choose the agents (i.e. extensions) belonging to the hunt group. Click the **Add/Remove** button to add or remove agents. Use the **Move Up** and **Move Down** buttons to order the list.
- 6. **Pullback to hunt group after ... seconds**: Enter the number of seconds that a call will ring on an extension before the system diverts the call to the next agent.

Note: Ensure that this value is *less* than the hunt group extension's <u>Forward Timeout</u> value. If the <u>Pullback to hunt group</u>... value is greater than the <u>Forward Timeout</u> value,

unanswered calls to the hunt group may be forwarded to an agent's voicemail.

7. Click OK.

See Also

Hunt groups

Assigning monitorable/recordable extensions to Supervisors/Administrators

Note: The information in this section applies to the IPFX Voice Capture product suite, in particular the Voice Capture Server Client and Voice Capture Solo Client products.

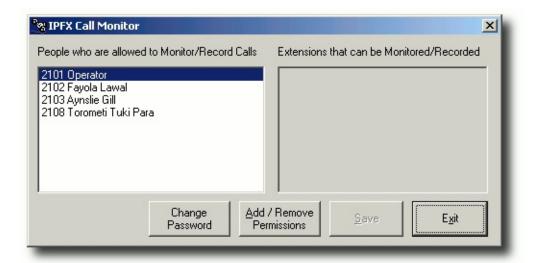
To prevent Administrators and Supervisors from being able to monitor or record extensions outside their area of authority, each administrator/supervisor can *only monitor or record those extensions explicitly allowed* by the IPFX Call Monitor Control application.

To allow extensions to be recorded on a per-user basis:

- 1. Log on to the IPFX Server
- 2. Run the IPFX Call Monitor Control Application: C:\VMLocal\MonitorControl.exe
- 3. The password window appears:



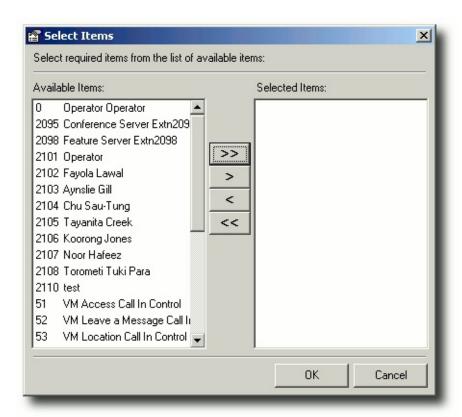
- 4. Enter the Call Monitor Control password. The default password is **9988**, but can be changed (see below).
- 5. The Call Monitor window appears:



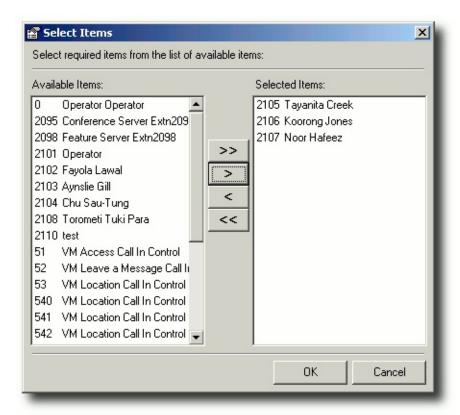
6. Click on the name of the administrator or supervisor to whom you wish to grant monitoring or recording privileges.

Tip! To give the same privileges to more than one administrator/supervisor, hold down the **CTRL** key while you click each name.

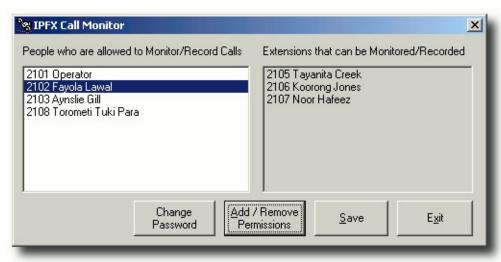
- 7. Click Add/Remove Permissions.
- 8. The Select Items window appears:



9. Select the extensions that you wish the administrator/supervisor to be able to monitor or record in the **Available Items** panel, and click the > button to move them to the **Selected Items** panel:



- 10. Click OK.
- 11. The selected extensions appear in the Call Monitor window:



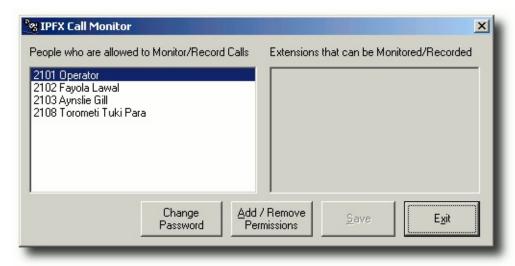
- 12. Click Save.
- 13. Repeat from step 6 for each administrator/supervisor for whom you wish to grant call monitoring or recording abilities.
- 14. Click Exit to close the IPFX Call Monitor application.

To change the IPFX Call Monitor password

- 1. Log on to the IPFX Server
- Run the IPFX Call Monitor Control Application:
 C:\VMLocal\MonitorControl.exe
- 3. The password window appears:



- 4. Enter the Call Monitor Control password. The default password is **9988**, but can be changed (see below).
- 5. The Call Monitor window appears:



- 6. Click Change Password.
- 7. The New Password window appears:



- 8. Enter a new Call Monitor password, and click **OK**.
- 9. The Confirm Password window appears. Enter the chosen password a second time to confirm, and click **OK**.
- 10. Click **Exit** to close the IPFX Call Monitor application.

Feature Server



PBX Dependent Feature!

Feature Server enables Users to place the following options on their extension via the phone:

To activate the Feature Server access

This is activated by pressing the * then the following tree of key presses, eg: to put a Call Forward All on your phone, you press *11 and then the destination.

Key Press 1 Forward

Press 1	Forward All
Press 2	Forward Busy/No Answer
Press 3	Forward Busy
Press 4	Forward No Answer
Press 5	Call Follow Me

Key Press 2 Pickup

Press 1	Directed Pickup
Press 2	Group Pickup
Press 3	Retrieve parked call

Key Press 3 Enter account code

Press 1	System Wide
Press 2	Private
Press 3	Retrieve

Key Press 5 Voicemail

Press 1	Access Voicemail
Press 2	Sent Message
Press 3	Change Location

Daylight Savings Rollover

Platforms affected: IPFX Director

Summary: When a daylight savings rollover occurs, phones are temporarily deregistered from the IPFX Server. Phones will automatically re-register in time, or can be rebooted to immediately resolve the issue. As daylight savings changes generally take place outside of normal working hours, this issue primarily affects 24-hour work environments.

Symptom: After a daylight savings rollover, SIP phones appear to be in an unprovisioned state. Message Waiting Indicators do not update and calls to a busy extension do not receive busy greetings.

Cause: The IPFX Server records when it last had any form of communication with each Phone device. When Microsoft Windows adjusts the clock for daylight savings, the IPFX Server believes that no communication has taken place with Phones for an hour (or whatever time adjustment has been applied). As a result, the IPFX Server deregisters the phones, leaving them unable to place or receive calls.

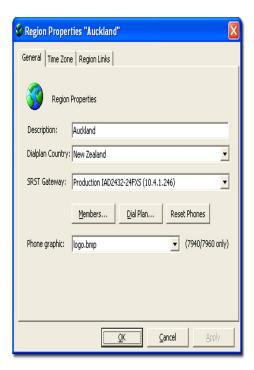
Solution: Phones must be re-registered with the IPFX Server. This can be achieved manually or automatically.

Manually re-registering phones:

Rebooting the phone will cause it to immediately re-register with the IPFX Server.

To reboot all phones in a Region, perform the following procedure:

- 1. As an Administrator, click the **Config** button in any IPFX Client to open the IPFX Configuration screen.
- 2. For each affected CT Server, locate and click on the **Configuration>Groups>Regions** folder.
- 3. Right-click on the Region whose phones you wish to reboot and select **Properties** from the context menu.



4. In the **General** tab, click the **Reset Phones** button.

This is the recommended practice for environments where daylight savings rollover takes place during working hours.

Automatically re-registering phones:

Phone devices will automatically re-register themselves with the IPFX Server after an interval defined in each Phone's configuration file:

- ATA, 7905 and 7912 Phone devices use the **CfgInterval** setting.
- 7940 and 7960 Phone devices use the timer_register_expires setting.

In a normal work environment, phones can be left to automatically reregister themselves.