



BWI Support phone: (508)-650-5900
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Setting up Call Center agents

To add an agent

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Agent List** link.

The Call Center Agent List appears.

ID	Name	Super.	AutoAns.	Commands
1	Agent1	No	Yes	Logged Off Change Reset Password Delete
2	Agent2	No	No	Logged Off Change Reset Password Delete
3	Agent3	No	No	Logged Off Change Reset Password Delete
4	Agent4	No	No	Logged Off Change Reset Password Delete
5	Agent5	No	No	Logged Off Change Reset Password Delete
				Add

4 Click the **Add** button.

The Add Agent page appears.

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Add Agent

Agent ID:

Name:

Supervisor:

Automatic Answer:

Missed Call Option:

Accepted Call Types:

Activity Code Entry Type:

Submit Cancel

5 If you want to change the Agent ID number, in the **Agent ID** box type the new Agent ID.

6 In the **Name** box type the name of the agent.

7 Select the **Supervisor** check box if you want to give the agent supervisor functionality. The default is not selected.

8 Select the **Automatic Answer** check box if you want calls to be force-delivered to the agent.

The default is not selected.

9 From the **Missed Call Option** list box select Make Not Ready (Return to Skillset) or Automatic Logout.

10 From the **Accepted Call Types** list box select Voice, Multimedia or Both.
If you do not have Multimedia Call Center enabled, Accepted Call Types does not appear.

11 If you use Basic Call Center, from the **Priority** list box select a priority for the agent.

12 If you use Activity Codes, from the Activity Code Entry Type list box select Optional or Prompted. The default is Optional.

13 Click the **Submit** button.

Resetting an agent's password

If an agent forgets their password, you can reset the password back to the default value (0000). After you reset the password, the agent must change their password the next time they log on.

To reset an agent's password

1 Log on to CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Agent List** link.
The Agent List page appears.

4 Click the **Reset Password** link for the agent whose password you want to reset.
A message appears that asks you to confirm the request to reset the password.

5 Click the **OK** button.
A message appears that the agent's password is reset. The agent password is set to 0000.

6 Click the **OK** button.

Deleting an agent

Deleting an agent removes the agent from Call Center. The agent is removed from the Agent List and all the skillsets they are assigned to.

To delete an agent

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Agent List** link.
The Agent List page appears.

4 Click the **Delete** link for the agent you want to delete.

A message appears that asks you to confirm the deletion.

If the agent you want to delete is logged on, the Delete button is not available.

If the agent you want to delete has logged on while you are deleting them, a message appears that says that the agent must log off before you can delete them.

5 Click the **OK** button.

A message appears that says the agent is deleted.

6 Click the **OK** button.

Setting up skillsets

About skillsets

Call Center skillsets answer and distribute calls to agents as they become available. Skillsets hold calls for different call center departments, such as sales and technical support.

Skillset properties

Skillset	The number between 1 and 50 that is assigned to the skillset.
Control DN	<p>The Control Directory Number is the extension associated with the skillset. Incoming calls transfer to the CDN of each skillset from extensions, the Automated Attendant or Custom Call Routing. The CDN is the skillset mailbox number.</p> <p>If you have a new Business Communications Manager system, you must use B1 DNs (extensions). A B1 extension number is the extension number that you dial to call a telephone or peripheral.</p> <p>You can use B2 DNs (extensions) on Business Communications Manager systems only if you have upgraded your system. A B2 extension is a spare extension.</p> <p>If you use Interactive Voice Response or any other application that uses Auto Assign, you must delete any Call Center CDNs before you install the other applications. After you install the applications you must set up the Call Center CDNs again.</p> <p>For more information about using B1 and B2s see "Using B1 and B2 DNs" on page 218.</p>
Name	<p>The skillset name is displayed:</p> <ul style="list-style-type: none"> • on Call Center displays to identify the skillset • in reports • as the skillset mailbox name <p>The skillset name can be a maximum of 16 characters. If you do not enter a name, the skillset name defaults to <i>SKILLn</i> where <i>n</i> is the skillset number. The name for each skillset is the same as the skillset mailbox name.</p>
MWI DN (Message Waiting Indication extension)	<p>The Message Waiting Indication extension is an optional phone number that indicates that a skillset mailbox has messages waiting. The MWI extension that you assign shows <i>Message for you</i> on the telephone display when there are new messages in the skillset mailbox. The MWI DN defaults to None. If you forget the MWI extensions for a skillset mailbox, you can view the MWI extensions by using the procedure "Determining a skillset mailbox number" on page 66.</p>
Method (Method of Call Distribution)	<p>The method of call distribution determines to which of several available agents to route the call. There are two methods of call distribution: Least Busy and Preferred. Least Busy routes the call to the agent who has been available the longest. Preferred routes the call to the agent with the highest priority (best qualified agent is 1). If there are several agents with the highest priority, the agent available longest with that priority will be selected. The default method of call distribution is Least Busy.</p> <p>If you use Call Center Professional you can assign agents different priorities depending on the skillsets they belong to. For more information refer to "Dynamic Agent Priority" on page 58.</p>

Break Time	<p>Break Time is a time period for agents to complete paperwork after they finish a call. After an agent completes a call, they are taken out of the skillset for the Break Time. The agent can extend or cancel the Break Time by using the Not Ready Feature Code. For more information, refer to "Not Ready" on page 35. The Break Time period can last from 00:00 to 59:59. The Break Time defaults is 00:30 seconds. You can change the Break Time period to 00:00 if an agent does not need a Break Time.</p> <p>If your Call Center uses Activity Codes, set the Break Time to longer than 10 seconds to allow time for Activity Code entry.</p>
Delay Answer	<p>Delay Answer is a toll-saving feature that prevents Call Center from answering calls and playing greetings when there are no agents available. When a call comes in on a line belonging to a skillset that has no free agents, the call is not answered until either the Delay Answer time elapses or an agent becomes available, whichever happens first. During the Delay Answer time, the waiting callers hear ringback.</p> <p>To activate the Delay Answer feature, enter a time for Delay Answer. The Delay Answer time can be a minimum of zero seconds and a maximum of 10 minutes. The default Delay Answer time is 00:00.</p>
Attendant extension	<p>The attendant extension is the extension used if a caller requests to talk to the operator after the caller transfers to the Automated Attendant or CCR. The attendant extension is optional. If you do not assign an attendant extension, the call is sent to the system attendant extension. If a call is transferred to an Auto Attendant greeting table, the call is sent to the greeting table attendant.</p>
Language preference	<p>Language preference can be either Primary or Alternate. The language preference is the language choice used for prompting callers who transfer to the Automated Attendant or CCR. Language preference appears only on a system that is configured as bilingual.</p>
Use previous _ calls to calculate EWT	<p>You can enter a number between 2 and 256 calls.</p> <p>For more information about Expected Wait Time see "Expected Wait Time" on page 133.</p>
EWT Increase Allowed	<p>Selected by default, which means that EWT will be recalculated if it increases, and the appropriate EWT greeting will be played.</p> <p>For more information about Expected Wait Time see "Expected Wait Time" on page 133.</p>
Initial Call Duration	<p>The Initial Call Duration is used to compute expected wait time until sufficient call statistics are obtained. This can be a value between 00:01:00 and 24:00:00.</p> <p>For more information about Expected Wait Time see "Expected Wait Time" on page 133.</p>
Activity Code Entry Type	<p>Activity Code entry types are Prompted and Optional. If you select Prompted, the agent is prompted to enter Activity Codes on their telephone. If you select Optional, an Activity Code session is not automatically displayed on the agent's telephone, but they can press F907 and enter Activity Codes.</p> <p>Optional is the default.</p> <p>For more information about Activity Codes see "Activity Codes" on page 197.</p>

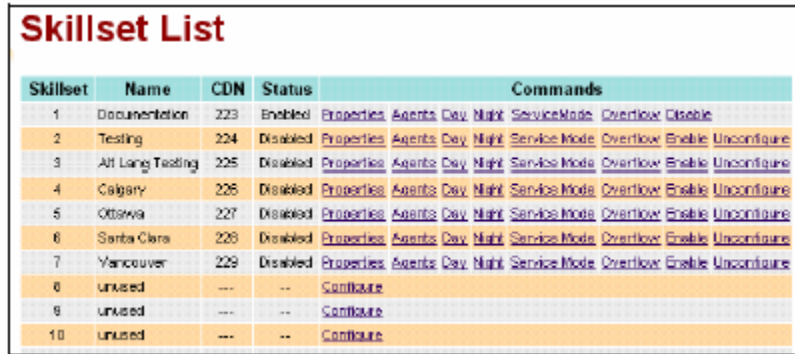
To set up or change a skillset

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.

The Skillset List page appears.

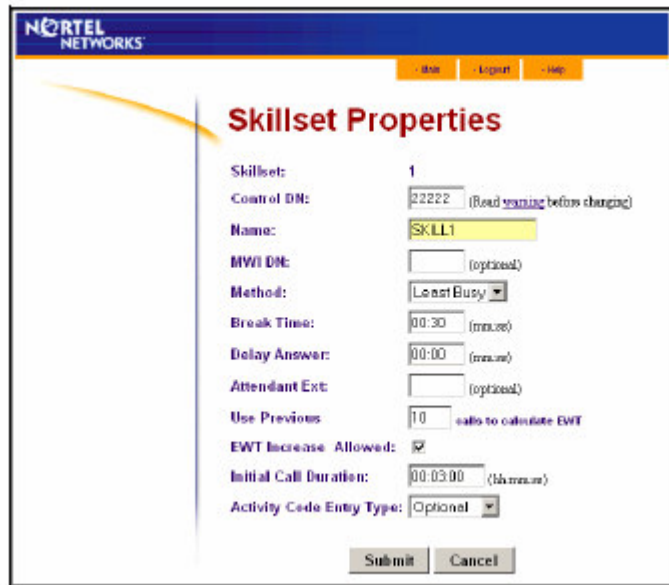


Skillset	Name	CDN	Status	Commands
1	Documentation	223	Enabled	Properties Agents Day Night Service Mode Overflow Disable
2	Testing	224	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
3	All Long Testing	225	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
4	Calgary	226	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
5	Ottawa	227	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
6	Santa Clara	228	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
7	Vancouver	229	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
8	unused	---	--	Configure
9	unused	---	--	Configure
10	unused	---	--	Configure

4 If you want to set up a skillset, click the **Configure** link for the skillset you want to set up or

if you want to change a skillset, click the **Properties** link for the skillset you want to change. The Skillset Properties page appears.

Note: Before you can change a skillset you must disable the skillset and wait until there are no calls in the skillset. You cannot change a skillset while it is in use.



SKILLSET PROPERTIES

Skillset: 1

Control DN: 22222 (Read existing before changing)

Name: SKILL1

MWI DN: (optional)

Method: Least Busy

Break Time: 00:30 (minutes)

Delay Answer: 00:00 (minutes)

Attendant Ext: (optional)

Use Previous: 10 calls to calculate EWT

EWT Increase Allowed:

Initial Call Duration: 00:03:00 (Maximum)

Activity Code Entry Type: Optional

Submit Cancel

5 In the **Control DN** box, type the extension for the skillset.

6 In the **Name** box type the name for this skillset. The skillset name can be a maximum of 16 characters.

7 In the **MWI DN** box, type the extension of the telephone that you want to display the Message

Waiting Indicator for the Skillset Mailbox.

8 From the **Method** list box, select Least Busy or Preferred.
The default is Least Busy.

9 In the **Break Time** box enter the Break Time period.
The default Break Time is 00:30.

10 In the **Delay Answer** box enter the delay answer time.
The default delay answer time is 00:00.

11 If you want to assign an attendant to the skillset, in the **Attendant Ext** box type the extension of the attendant.

12 If your system is configured for bilingual operation, from the **Prompt Language** list box, select Primary or Alternate. The Prompt Language list box does not appear if you do not use bilingual operation.

13 If you use Expected Wait Time (EWT), enter the number of calls you want to use to calculate EWT in the **Use Previous ___ calls to calculate EWT** box. This is the number of previous calls that are used to calculate the average call duration of a skillset. The number can range from 2 to 256. The default is 10

14 If you use Expected Wait Time, leave the **EWT Increase Allowed** check box selected if you want the system to recalculate the EWT if it increases and continue to play the appropriate EWT greeting. If you clear the check box, callers will not hear recalculated expected wait times if the wait time increases. Whether you select the check box or not, callers will hear the appropriate EWT greeting if the wait time decreases.

15 If you use Expected Wait Time, in the **Initial Call Duration** box enter in hh:mm:ss format the initial average call duration that is used to compute EWT. The average call duration is updated whenever a call is released from an agent. The default is 00:03:00.

16 If you use Activity Codes, from the **Activity Code Entry Type** list box select **Prompted** or **Optional**. The default is optional. For more information about Activity Codes refer to [“Activity Codes” on page 197](#).

17 Click the **Submit** button.
A message appears that says a new mailbox is created, and that you must initialize it before you enable the skillset.

18 Click the **OK** button.

Assigning an agent to a skillset

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

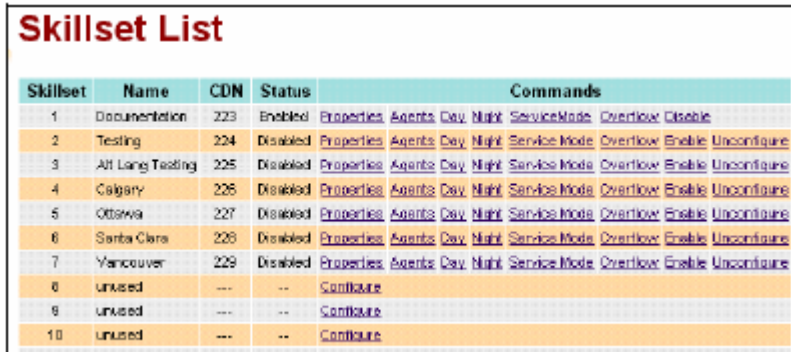
To assign an agent to a skillset

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.

The Skillset List page appears.



Skillset	Name	CDN	Status	Commands
1	Documentation	223	Enabled	Properties Agents Day Night Service Mode Overflow Disable
2	Testing	224	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
3	Alt Lang Testing	225	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
4	Calgary	226	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
5	Ottawa	227	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
6	Santa Clara	228	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
7	Vancouver	229	Disabled	Properties Agents Day Night Service Mode Overflow Enable Unconfigure
8	unused	---	--	Configure
9	unused	---	--	Configure
10	unused	---	--	Configure

4 Click the **Agents** link for the skillset that you want to add agents to.

The skillset must be configured before the Agents link appears.

The Assigned Agents page appears.

5 Click the **Assign** button.

The Assign Agents page appears with the available agents displayed.



Assign	ID	Name
<input type="checkbox"/>	1	R. Munro
<input type="checkbox"/>	2	C. Jackson
<input type="checkbox"/>	3	C. Dressler

Priority:

6 Click the **Assign** check box for each agent that you want to add to the skillset.

7 If you use Professional or Enhanced Call Center, from the **Priority** list box, select the Priority of the agent.

1 is the highest priority.

8 Click the **Submit** button.

The agent you selected appears on to the Assigned Agents page.

If you want to assign another agent to this skillset, follow steps 5 through 8.

9 Click the **Close** button to return to the Skillset List page.

Unassigning an agent from a skillset

When you unassign an agent from a skillset, the agent is removed from the skillset but is not deleted from Call Center.

To unassign an agent from a skillset

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Agents** link for the skillset you want to unassign an agent from.
The Assigned Agents page appears.

5 Click the **Unassign** link for the agent you want to remove.
A message appears that asks you to confirm your request to unassign the agent.

Note: If the agent you are unassigning is logged on, a message appears that says the agent is logged on and asks you to force the agent off or ask them to log off.
To unassign the agent, click the OK button.

6 Click the **OK** button.
The agent is removed from the Assigned Agents page.

7 Click the **Close** button to return to the Skillset List page.

Enabling a skillset

After you set up a skillset, the skillset is disabled until you enable it.

To enable a skillset

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.
The Skillset List page appears.

4 Click the **Enable** link for the skillset to you want to enable.
On the Skillset List page in the Status column the skillset changes from Disabled to Enabled.
A message appears that says what Service Mode the skillset is in.

Disabling a skillset

You must disable a skillset if you want to change the skillset properties or administer the lines.
If you disable a skillset, no new calls go to the skillset. Any calls that are in the skillset get distributed until the calls are ended.

To disable a skillset

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.

The Skillset List page appears.

4 Click the **Disable** link for the skillset you want to disable.

A message appears that asks you to confirm the request to disable the skillset.

5 Click the **OK** button.

On the Skillset List page in the Status column the skillset changes from Enabled to Disabled.

About Call Center greetings

Call Center greetings encourage callers to stay on the line until an agent is available. You can record greetings in different languages and change them as often as you like.

Examples of Call Center greetings

You can record different types of greetings for Call Center. Before you record your greeting, determine what information the greeting includes. When you prepare your greeting, include important times and dates. Keep greetings as short and concise as possible. Use the following examples of greetings as a reference.

General company greeting The general company greeting informs callers that they have reached the correct company. It can also include the location and business hours of your company.

“Thank you for calling Bridgestone Computers. We are located at 52 Main Street. Our hours of service are Monday to Friday from 8:00 until 5:00. Please stay on the line and an agent will be with you as soon as possible. Or press 0 to leave a message and one of our agents will return your call.”

Please wait greeting Please wait greetings encourage callers to stay on the line.

“All our agents at Bridgestone Computers are currently busy, but please hold as your call is very important to us.”

Information greeting An information greeting provides messages and announcements to callers.

“ Thank you for calling Bridgestone Computers. This week we have extended our hours until we sell all spring merchandise. We will be open until 9:00 pm Monday through Thursday, and we will be open until midnight on Friday! Please come in and see us at 52 Main Street.”

Transfer greeting A transfer greeting lets a caller transfer their call.

“Please press 1 to leave a message and one of our agents will return your call. Press 2 to return to the previous choices.”

Non-business hours greeting Your non-business hours greeting will be played after your business is closed:

“ You have reached Bridgestone Computers. Our hours of service are Monday to Friday from 8:00 until 12:00 and 1:00 until 5:00. To leave a message, please press zero. An agent will return your call when we re-open. Thank you for calling.”

Expected Wait Time greeting EWT greetings notify callers of their expected wait time in a skillset.

“Based on the current volume of calls, the next agent will be available in two minutes.”

Recording a Call Center greeting

Before you record a greeting, write the greeting out so that you include everything that you want to say.

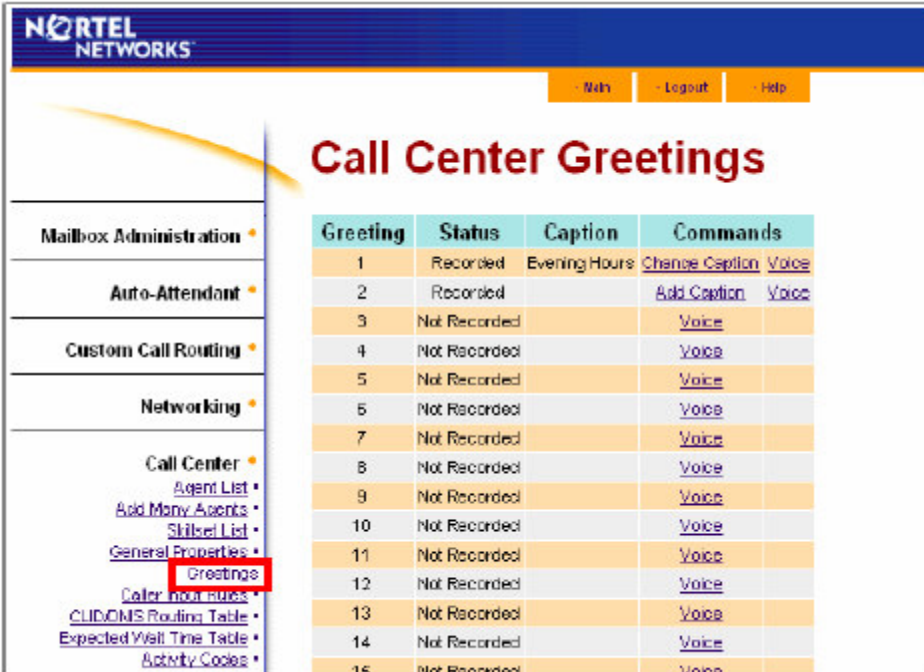
We recommend that you record greetings that are a maximum of 20 seconds long. If your greetings are longer than 20 seconds, callers must wait in a skillset a longer time before they hear another greeting.

To record a Call Center greeting

1 Click the **Call Center** heading.

2 Click the **Greetings** link.

The Call Center Greetings page appears.



The screenshot displays the 'Call Center Greetings' page in the Nortel Networks interface. The page features a navigation sidebar on the left and a main content area with a table of greetings. The 'Greetings' link in the sidebar is highlighted with a red box. The table lists 15 greetings, with the first two recorded and the rest not recorded. Each row includes a 'Voice' link for recording.

Greeting	Status	Caption	Commands
1	Recorded	Evening Hours	Change Caption Voice
2	Recorded		Add Caption Voice
3	Not Recorded		Voice
4	Not Recorded		Voice
5	Not Recorded		Voice
6	Not Recorded		Voice
7	Not Recorded		Voice
8	Not Recorded		Voice
9	Not Recorded		Voice
10	Not Recorded		Voice
11	Not Recorded		Voice
12	Not Recorded		Voice
13	Not Recorded		Voice
14	Not Recorded		Voice
15	Not Recorded		Voice

3 Click the **Voice** link for the number of the greeting you want to record.

The page you can record a greeting from appears. If you use CallPilot 100/150, you can import but not export greetings.

Call Center Greeting 4

Phone Set:

Connect To:

Changes to the recording are applied ONLY when the SAVE button is pressed BEFORE hanging up.

Play	Stop
Record	Save

Import:

From:

Export:

[Native Encoding](#) [Wav Encoding](#)

4 In the **Connect to** box, type the extension number or telephone number you are using to record the greeting.

For a local extension, type the extension number. For a telephone number that is not a local extension, type the sequence of digits that dial the telephone number from the voicemail system. For example, you might need to dial 9, the area code, and then the telephone number. For a telephone number that is not a local extension, the number you dial must use a destination code. For more information about destination codes, refer to your telephony System Administrator.

5 Click the **Dial** button.

The telephone rings.

6 Pick up the handset. Do not use Handsfree. Click the **Record** button. After the tone, record your greeting.

7 After you finish recording, click the **Stop** button.

8 To listen to the recording, click the **Play** button

or

to save the recording, click the **Save** button.

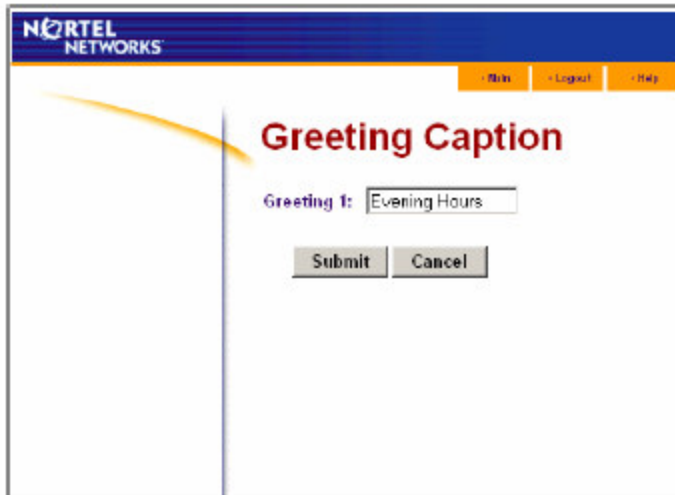
The recording replaces a previously recorded greeting.

9 Click the **Close** button and replace the telephone handset.

10 If you want to enter a caption for the greeting, click the **Refresh** button on your browser.

11 Click the **Add Caption** link for the greeting.

The Greeting Caption page appears.



12 In the **Greeting** box type a descriptive name for the greeting. The greeting caption can be a maximum of 30 characters.

13 Click the **Submit** button.

Setting up Routing Tables

About Routing Tables

Routing tables determine how the system answers, holds and routes incoming calls to agents in your call center. You set up routing tables to handle incoming calls for each skillset. A call in a skillset receives the treatment specified by the routing table. The treatment can be a combination of greetings, transfers, distribution, and being on hold. If an agent becomes available, the call is sent to the available agent.

Each skillset has a Day and a Night Routing Table. Set up the Day Routing Table for your business hours. Set up the Night Routing Table for your non-business hours.

The maximum number of steps you can add to a routing table is 20.

About types of Routing Table steps

You can add these types of steps to routing tables:

Greeting	<p>A Greeting step plays a greeting to callers waiting in a skillset. You assign greeting parameters to each greeting. After the greeting plays, the call goes to the next routing step. If there is no next step, the call ends.</p> <p>An EWT Greeting step uses the EWT Table you select to play estimated wait time messages to callers. EWT greeting steps act the same as greeting steps.</p>
Distribute for	<p>During a Distribute for step, calls wait to be distributed to agents. If no agents are available before the distribution time expires, the call goes to the next step in the routing table. If there is no next step set up in the routing table, the call ends.</p> <p>The minimum distribution time is zero and the maximum distribution time is 59 minutes and 59 seconds. The default distribution time is 30 seconds.</p>
Goto	<p>A Goto step is the last step in a routing table. A Goto step moves the caller to an earlier routing step.</p> <p>For example, if a Goto step points to step 1, the call goes back to step 1 and repeats the steps. The steps are repeated until an agent becomes available or the caller leaves a message in the skillset mailbox.</p> <p>The first step in a routing table cannot be a Goto step because there are no possible target steps yet.</p> <p>A Goto step cannot point to itself.</p>
Transfer	<p>A Transfer step can transfer calls to:</p> <ul style="list-style-type: none"> • an extension • a mailbox • an external number • the Automated Attendant • an operator • a CCR Tree
Disconnect	<p>A Disconnect step releases calls from the skillset. If the first step in a routing table is a Disconnect, Call Center does not answer the call.</p>

Greeting step parameters

<p>Forced Play</p>	<p>Enable Forced Play for a greeting that contains important information that you want callers to hear. If an agent becomes available while a caller is listening to a Forced greeting, the greeting is not interrupted. The caller must listen to the entire greeting.</p> <p>If you do not enable Forced Play, when an agent becomes available the greeting is interrupted and the call goes to the available agent.</p> <p>Limit the number of Forced Play greetings and keep Forced Play greetings as short as possible. Long Forced Play greetings increase the transfer time of calls to agents and cause unpredictable increases in distribution times. For more information, refer to "Routing Table administration" on page 216.</p>
<p>Intelligent Caller Input Routing, Basic</p>	<p>While the greeting plays callers can:</p> <ul style="list-style-type: none"> • press 1 to transfer to the Automated Attendant • press 0 to transfer to the Operator • press 9 to leave a message in the skillset mailbox • press 2 to transfer to a CCR Tree <p>These are the default keypad buttons. You can change the keypad buttons. Ensure that the Non-business hours greetings have Intelligent Call Input Routing, Basic enabled so that callers can direct how they transfer their calls.</p>
<p>Intelligent Caller Input Routing, Advanced</p>	<p>Advanced Intelligent Caller Input Routing is available if you use Enhanced or Professional Call Center.</p> <p>Intelligent Caller Input Routing, Advanced uses the Caller Input Rules you create to change the priority and route calls to other skillsets or locations based on caller multi-digit DTMF input.</p> <p>Callers enter a sequence of DTMF digits such as a charge card number or passcode. The caller input is used to determine call treatment. Based on the caller input, the call can change in priority and/or be routed to:</p> <ul style="list-style-type: none"> • the Automated Attendant • the Operator • the skillset mailbox • a CCR Tree • a mailbox • an extension • an external number • another skillset <p>Intelligent Caller Input Routing, Advanced parameters:</p> <ul style="list-style-type: none"> • Retries is 0-5, default is 2. This is the number of times a Data Entry step repeats itself on a caller entry error. • Number of Caller Input Rule tables is equal to the number of available skillsets.
<p>No Intelligent Caller Input Routing</p>	<p>While the greeting plays callers cannot press a dialpad button to transfer their call. Call Center ignores buttons pressed on the dialpad. The greeting plays without interruption. This is the default setting. At the end of the greeting, the caller goes to the next routing step. If there is no next step, the call ends.</p>

Adding a Greeting step

Greeting steps play a message to waiting callers.

To add a Greeting step

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.
The Skillsets List page appears.

Skillset List

Skillset	Name	CDN	Status	Commands						
1	Documentation	223	Enabled	Properties	Agents	Day	Night	Service Mode	Overflow	Disable
2	Testing	224	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable
3	All Lang Testing	225	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Unconfigure
4	Calgary	226	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable
5	Ottawa	227	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Unconfigure
6	Santa Clara	228	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable
7	Vancouver	229	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Unconfigure
8	unused	---	--	Configure						
9	unused	---	--	Configure						
10	unused	---	--	Configure						

4 Click the **Day** or the **Night** link for the skillset to which you want to add a greeting step.
The Day or the Night Routing Table page appears.

Day Routing Table

Skillset 7

This routing table **DOES NOT** guarantee fax delivery to the skillset mailbox ([more information](#)).

Step	Information	Commands
End		Insert

5 Click the **Insert** link.
The Routing Step page appears.

NORTEL NETWORKS

Home Logout Help

Routing Step

Skillset 1 Step Number (New)

Step Type:

Greeting: 1
 Forced Play:

EWT Greeting Table:
 Forced Play:

Distribute fee: 00:30 (www.ca)
 Transfer to Extension:
 Transfer to mailbox:
 Transfer to external:
 Outdial Method: Line (Line/Pool#)
 Transfer to Auto-Attendant: None Greeting Table #
 (Select "None" for default AA prompt.)
 Transfer to Operator
 Transfer to CCR: 1
 Disconnect

Intelligent Caller Input Routing: (for Greeting/EWT Greeting step only)

None
 Basic
 Auto-Attendant 1 Table None
 (Select "None" for default AA prompt.)
 Operator 0
 Skillset Mailbox 9
 CCR 2 Tree 1
 Advanced
 Retries 2
 Caller Input Rules Table

Submit Cancel

6 At the **Step Type** option, from the **Greeting** list select the greeting you want to use
 Or if you want to use Expected Wait Time greetings, select **EWT Greeting Table** and from the list select the EWT Table you want to use.
 If you have entered a greeting caption for the greeting or the EWT Greeting Table, the caption name appears.

7 If you want the caller to listen to the entire message before they transfer to an agent, select the **Forced Play** check box.

8 At the **Intelligent Caller Input Routing** option, select how you want callers to be able to transfer their calls:

- Select **None** if you do not want callers to be able to transfer their calls.
- Select **Basic** if you want callers to be able to transfer to the Automated Attendant, operator, skillset mailbox or a CCR Tree. Select the transfers available to callers:
 - Select the **Auto Attendant** check box if you want callers to be able to transfer to the Automated Attendant. By default callers press / to transfer to the Automated Attendant. and select a Greeting Table to transfer the call to, or select None to transfer the call to the default Auto Attendant prompt. You can assign a different dialpad button by selecting a number from the list box.
 - Select the **Operator** check box if you want callers to be able to transfer to the Operator. By default callers press , to transfer to the Operator. You can assign a

different dialpad button by selecting a number from the list box.

— Select the **Skillset Mailbox** check box if you want callers to be able to transfer to the skillset mailbox. By default callers press * to transfer to the skillset mailbox. You can assign a different dialpad button by selecting a number from the list box.

— Select the **CCR** check box if you want callers to be able to transfer to a CCR Tree. By default callers press # to transfer to a CCR Tree. You can assign a different dialpad button by selecting a number from the list box. From the **Tree** list box select the CCR Tree you want callers to transfer to.

• Select **Advanced** if you want callers to be able to enter multiple digits such as a passcode or a credit card number. Advanced is available only if you use Call Center Professional.

Select the Advanced parameters:

— From the **Retries** list box select a number between 0 and 5.

The default is 2. This is the number of times a Data Entry step repeats itself on a caller entry error.

— From the **Caller Input Rules Table** list box select a table. This is the rules table used for processing this route step.

You must have created rules in the Caller Input Rules Table. For more information, refer to [“Creating a Caller Input Rule” on page 159](#).

9 Click the **Submit** button.

The Greeting step appears in the Routing Table list.

10 Click the **Close** button to return to the Skillset list.

Adding a Distribute for step

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

To add a Distribute for step

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.

The Skillset List page appears.

4 Click the **Day** or the **Night** link for the skillset you want to add a distribution step to.

The Day or Night Routing Table page appears for the skillset.

5 Click the **Insert** link for the step you want to add a Distribute for step to.

The Routing Step page appears.

6 Click the **Distribute for** option.

7 In the **Distribute for** box enter the longest time in minutes and seconds that callers can wait on hold in this step.

8 Click the **Submit** button.

The Distribute For step appears in the Routing Table list.

9 Click the **Close** button to return to the Skillset list.

Adding a Goto step

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

To add a Goto step

- 1** Start CallPilot Manager.
- 2** Click the **Call Center** heading.
- 3** Click the **Skillset** link.
The Skillset List page appears.
- 4** Click the **Day** or the **Night** link for the skillset you want to add a Goto step to.
The Day or the Night Routing Table page appears.
- 5** Click the **Insert** link for the step you want to add a Goto step to.
The Routing Step page appears.
- 6** Click the **Goto Step** option.
- 7** From the **Goto Step** list box select the number of the Routing Table step you want to send callers to.
- 8** Click the **Submit** button.
The Goto step appears in the Routing Table list.
- 9** Click the **Close** button to return to the Skillset List page.

Adding a Transfer step

- 1** Start CallPilot Manager.
- 2** Click the **Call Center** heading.
- 3** Click the **Skillset List** link.
The Skillset List page appears.
- 4** Click the **Day** or the **Night** link for the skillset you want to add a Transfer step to.
The Day or the Night Routing Table page appears.
- 5** Click the **Insert** link for the step you want to add a Transfer step to.
The Routing Step page appears.
- 6** Select where you want to transfer the call to:
 - if you want to transfer the call to an extension, select **Transfer to Extension** and enter the extension
 - if you want to transfer the call to a mailbox, select **Transfer to mailbox** and enter the mailbox number
 - if you want to transfer the call to an external number:
 - select **Transfer to external** and enter the external number
 - from the **Outdial Method** list box select **Line, Pool** or **Route**

- if you select Line or Pool, in the **Line/Pool#** box enter the line or line pool number
- if you want to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant**. From the list box you can select the Greeting Table you want to transfer calls to, or None.
 - if you want to transfer the call to the operator, select **Transfer to Operator**
 - if you want to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list box select the number of the CCR Tree you want to transfer the call to.

7 Click the **Submit** button.

The Transfer step appears in the Routing Table list.

8 Click the **Close** button to return to the Skillset list.

Adding a Disconnect step

Disconnect steps release a call from the skillset it is in. If the first step in a routing table is a Disconnect step, Call Center does not answer the call.

To add a disconnect step

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.

The Skillsets List page appears.

4 Click the **Day** or the **Night** link for the skillset you want to add a disconnect step to.

The Day or the Night Routing Table page appears.

5 Click the **Insert** link for a step in the routing table.

The disconnect step is added before this step. To add the disconnect step to the end of the routing table, click the **Insert** link for the End step. If the Routing Table is full the End step does not appear.

The Routing Step page appears.

6 Click the **Disconnect** option.

7 Click the **Submit** button.

The Disconnect step appears in the Routing Table list.

8 Click the **Close** button to return to the Skillset List page.

Assigning Routing Table hours of operation

To assign the routing table hours of operation for each day of the week, you set the start times for the Day and Night Routing Tables for each skillset. The start times determine which routing table is used for the skillset.

You can also leave the default as 24 hour operation. If you select 24 hour operation, the skillset uses the Day Routing Table only for that day.

To assigning hours of operation to a skillset

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.

The Skillset List page appears.

Skillset	Name	CDN	Status	Commands							
1	Documentation	223	Enabled	Properties	Agents	Day	Night	Service Mode	Overflow	Disable	
2	Testing	224	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
3	All Lang Testing	225	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
4	Calgary	226	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
5	Ottawa	227	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
6	Santa Clara	228	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
7	Vancouver	229	Disabled	Properties	Agents	Day	Night	Service Mode	Overflow	Enable	Unconfigure
8	unused	---	--	Configure							
9	unused	---	--	Configure							
10	unused	---	--	Configure							

4 Click the **Service Mode** link for the skillset you want to set up.

The Skillset Service Mode page appears.

Skillset Service Mode

Skillset: 7

	24 hr Service	Day Start Time (hh:mm - 24 Hour Format)	Night Start Time (hh:mm - 24 Hour Format)
Monday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Tuesday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Wednesday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Thursday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Friday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Saturday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Sunday:	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

5 For each day of the week set the hours of operation for the skillset:

- to have the skillset operate in 24 hour mode, leave the **24 hr Service** check box selected for that day
- to set the start time for the Day Routing Table, in the **Day Start Time** box enter the start time in 24 hour format
- to set the start time for the Night Routing Table, in the **Night Start Time** box enter the start time in 24 hour format

6 Click the **Submit** button.

Changing a Routing Table

You must disable a skillset before you can change its routing table.

Reviewing Routing Table steps

You can review the steps for enabled skillsets.

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.

The Skillset List page appears.

4 Click the **Day** or **Night** link for the skillset whose routing table steps you want to review.

The Day or Night Routing Table page appears.

5 Click the **View** link to view the steps.

6 After you review the steps, click the **Close** button.

Modifying Routing Table steps

You must disable a skillset before you can modify its routing table steps.

For how to disable a skillset refer to [“Disabling a skillset” on page 63](#).

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** heading.

The Skillset List page appears.

4 Click the **Day** or the **Night** link for the skillset with the routing table you want to change.

The Day or the Night Routing Table page appears for the skillset.

5 Click the **Modify** link for the step you want to change.

The Routing Step page appears.

6 Make the changes you want to the routing table step.

7 Click the **Submit** button.

The changed step appears in the Routing Table list.

8 Click the **Close** button to return to the Skillset List page.

Deleting Routing Table steps

You must disable a skillset before you can delete its routing table steps.

For how to disable a skillset refer to [“Disabling a skillset” on page 63](#).

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Skillset List** link.

The Skillset List page appears.

4 Click the **Day** or the **Night** link for the skillset with the step you want to delete.

The Day or the Night Routing Table page appears for the skillset.

5 Click the **Delete** link for the step you want to delete.
A message appears that asks you to confirm the deletion.

6 Click the **OK** button.
The step is deleted from the Routing Table list.

7 Click the **Close** button to return to the Skillset List page.sss

Creating Caller Input Rules

If you use Enhanced or Professional Call Center, you can create Caller Input Rules that route calls to other skillsets or locations based on caller multi-digit DTMF input. Caller Input Rules let you identify callers depending on what kind of services your call center has. For example, callers can enter a passcode to access a special service line. Refer to “[An example of using Intelligent Caller Routing, Advanced](#)” on page 163 for an example of how to use Caller Input Rules in your call center.

If you use Professional Call Center you have 50 Caller Input Tables, or 30 tables if you use Enhanced Call Center. You do not have Caller Input Tables if you use Basic Call Center. You can create up to 2,000 Caller Input Rules for each table. Each rule has a Match String, and an Action. The Match String is the string of digits that is checked, and the Action is the routing applied to calls that match the rule. The list of Caller Input Rules is sorted numerically by Match String. If strings overlap, longer, more-specific strings appear before shorter, less-specific strings.

Creating a Caller Input Rule

1 Start CallPilot Manager.

2 Click the **Call Center** heading.

3 Click the **Caller Input Rules** link.
The Caller Input Rules Tables page appears.



Tables ID	Length	Commands
1		Create
2		Create
3		Create
4		Create
5		Create
6		Create
7		Create
8		Create
9		Create
10		Create
11		Create
12		Create

4 Click the **Create** link for the Caller Input Rules Table you want to add a rule to.
The Rule Table Properties page appears.

Rule Table Properties

Rule Table: 1

Length:

Fixed:

Variable: to

5 Select **Fixed** or **Variable**, depending on whether you want to create a rule that applies to a dialstring of a fixed or variable length:

- If you select **Fixed**, in the **Fixed** box enter the number of digits allowed.

The fixed length can be from 1 to 50 digits.

- If you select **Variable**, in the **Variable** boxes type the minimum to the maximum range of caller input digits. The minimum value must be 1 or greater. The maximum value must be anything greater than the minimum value, up to 50.

6 Click the **Submit** button.

You return to the Caller Input Rules Tables page.

7 Click the **Rules** link for the table you want to create a rule for.

The Match Table page appears.

Match Table

Rule Table: 1

Match String	Action	Commands
		<input type="button" value="Add"/>

8 Click the **Add** button.

The Match Rule Setup page appears.

NORTEL NETWORKS

- Home - Logout - Help

Match Rule Setup

Rule Table 1

Match String:

Action:

Move to Skillset:

Send to Skillset Mailbox:

Transfer to Extension:

Transfer to Mailbox:

Transfer to External:

Outdial Method: (Line/Pool #)

Transfer to Auto Attendant: Creating Table #
(Select "None" for default AA prompt.)

Transfer to Operator

Change Call Priority Only

New Call Priority:

9 In the **Match String** box type the string you want to match.

You can use # and * as wildcard characters.

For information on using wildcard characters refer to [“Using wildcard characters”](#) on page 163.

10 Select an action for how you want to route the call:

- if you want to transfer the call to another skillset:

- select **Move to Skillset**

- from the list box select the number of the skillset you want to transfer the call to.

- if you want to change the priority of the call, select a number between 1 and 20 from the **New Call Priority** list box. The default is 10.

- if you want to transfer the call to the skillset mailbox, select **Send to Skillset Mailbox**

- if you want to transfer the call to an extension, select **Transfer to Extension** and in the box type the extension number you want to transfer the call to

- if you want to transfer the call to a mailbox, select **Transfer to Mailbox** and in the box type the mailbox number you want to transfer the call to

- if you want to transfer the call to an external number:

- select **Transfer to External**

- in the box type the number you want to transfer the call to

- from the **Outdial Method** list box select an outdial method

- if you select Line or Pool, in the **Line/Pool#** box type the line or line pool number used

- if you want to transfer the call to the Automated Attendant, select **Transfer to Auto Attendant** and select a Greeting Table to transfer the call to, or select None to transfer the call to the default Auto Attendant prompt.

- if you want to transfer the call to the operator, select **Transfer to Operator**

- if you want to transfer the call to a CCR Tree, select **Transfer to CCR** and from the list

box select the number of the CCR Tree you want to transfer the call to

- if you want the call to remain in its skillset but you want to change the call's priority within the skillset, select **Change Call Priority Only** and from the **New Call Priority** list box select a priority between 1 and 20 for the call. The default is 10.

11 Click the **Submit** button.

The rule you created appears in the Match Table.

Repeat steps 8 through 11 if you want to add another rule to the table

or

click the **Close** button to return to the Caller Input Rules Tables page.