Operator Console Quick Reference Guide

RAZORLINE

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Overview

The Operator Console enables one or multiple operators (or agents) to manage incoming calls. If an organization manages multiple types of calls (sales, service, etc.) theses calls may be segregated into different queues so an operator can focus on one type of inquiry. Conversely, operators can login (or logout) of multiple queues to support multiple teams. Based on availability, the system will deliver the oldest call in the queue to the operator that has been idle the longest in that queue.

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A: Status Bar ——

Section A: Status Bar

The main Status Bar provides commonly used functionality
(your name, logged in status, time in-use, logout button, settings, etc.).

In the upper left, a status icon provides your state:

Ready/Not Ready status – To accept calls you must be in the Ready state. If, for any reason, an operator needs to leave the console for a moment, they can change their status to Not Ready, without completely logging out from the queues. This means the system will still consider an operator as logged in, but will not forward queued calls to the "not ready" operator.

After Call Work (ACW) - This status (activated when a queue call is completed and hung up) makes the operator temporarily unavailable, providing the operator time to complete administrative activities related to the prior call.

Transferring a Call via the Directory

For most operators, this will be the primary use of the console.
- After Answering a Call:

Blind transfer, via the directory
Search the directory and right-click on the desired user.
Note: Avoid clicking on the contact number or a call will start.
In the pop-up menu, hover over "Transfer to" and then slide the mouse over to the user's phone number – this action will complete the transfer. **Or** with the destination user's name highlighted, click on the Transfer icon in the Phone Control Bar.

Consultative transfer, via the directory
Search the directory and right-click the desired destination.
Note: Avoid clicking on the contact number or a call will start.
In the pop-up menu, hover over "Consult" and then slide the mouse over to the user's phone number to start the transfer. Or with the destination user's name highlighted, click on the Consult icon in the Phone Control Bar.

Once the user answers you can complete the transfer at any time by clicking the Transfer icon in the Phone Control Bar.

Section B: Phone Control Bar

19he Phone Control Bar provides one touch access to common call handling services via a context-based menu (different features are available based on the call state). Call management actions (such as answering, hold, transfer, park, etc.) can be performed using these dedicated buttons or by using shortcut commands from the keyboard. Hover over an icon to see a text description of the feature.

The text box on the left side of Phone Control Bar is used to enter phone numbers. Numbers can be entered via the keyboard or by clicking on the keypad icon to pop-up a dial pad. The Phone Control Bar also provides the option to enable or disable DTMF tones (tones are typically required for browsing IVR trees or inserting pin codes).

Section C: Call Status Bar

19he Call Status Bar contains a list of the calls related to a specific phone call. The following information is provided for each call:

- Number of the call (i.e. call 1, 2, 3 etc.)
- Phone number of the operator managing the call
- Call status icon (waiting, hold, etc.)
- Phone number of the calling or called party
- Name of the calling or called party
- Call duration (waiting time or conversation time, depending on the call status)
- Call type (incoming or outgoing)

Selecting a call with the mouse and right-clicking on it exposes a context-based drop-down menu, as shown.

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Section D: Speed Dial Bar and Buttons

Operators can create one-touch speed dials and/or use shortcut keys to access frequently dialed numbers. Speed dials are stored centrally so they are available to operators on whatever device they use for login. Hover over a speed dial icon to see details.

History Button
The History button provides a list of placed, received, and missed calls, in separate tabs.

Memo Button
The Memo Button provides a quick way to create reminders for calls or actions. Each reminder provides basic contact information (number and contact name) and a notes field. Memos have a reminder function. At the date/time entered, the system will pop-up a notification to remind the operator to:
- Call – directly call the phone number entered.
- Edit – edit the memo.
- Snooze – postpone the memo.
- Close – remove the memo.
- Logout - exit the console.

Section E: Directory Area

19he Phone Control Bar provides one touch access to common call handling services The Directory search box provides access to corporate and personal directories. Operators can search by contact information such as contact name, company name, department, or stored data.

Note: The search function returns results for all the contacts containing the search string in one of their information fields (for example searching "Wil" will return "Will"iam White as well as Kevin Green of "Will"ington Co). If configured by the system administrators, agents can use "%", "", and "#" as wildcard characters.*
- First and last name.
- Phone status.
- Extension (or main number)*.
- Business number*.
- Email*.

(*) The last three fields displayed are configurable. For example, users can display the company name instead of the business number.

Section F: Info Tab
The Info Tab presents all the information related to an incoming call or contact, including the data generally not shown in the Directory area.
The following actions are available:
- Call the number.
- Send an email.
- Go to Website.

Section G: Park Tab
Note: This tab and relative features require park features to be configured in the system.

Use the Park tab to view and/or retrieve parked calls (by any operator).
- The system shows the most significant data for each call, such as calling/ called party number and the identity of the operator (by operator number) that parked the call.
- Hovering over the list of calls provides the full name of the operator that parked the call.
- Operators can retrieve a parked call by clicking on the desired call, right-clicking to expose a command menu and then selecting "Get Call From Park."

To view additional information, click on the contact. The system will display any additional information in the Info area.
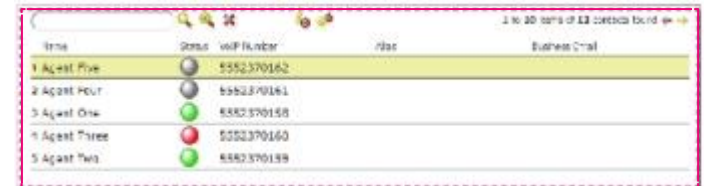

- To call a contact in the list, click on the phone number.
- Send an email by clicking an email address (the system will automatically open the operator's default e-mail client).

The system also provides a context-based action menu. Select the contact and right-click to view different actions for the selected contact, including:
- Call.
- Create a speed dial for the contact.
- Create memo.
- Add contact to favorites.
- Search similar contacts

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Section H: Favorites Tab
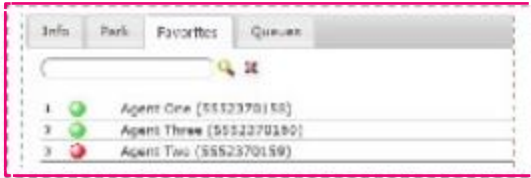
The Favorites Tab content is created and managed by the operator. The tab provides a quick way to monitor and access frequently used contacts. The list includes each contact's phone number and presence status. The Favorites list can accelerate the Transfer process as it eliminates the need to type a name into the Directory search box.

Note: There is also an option to have Favorites appear as a dedicated section of the console. If this option is configured in the console, only 3 tabs appear, and the Favorites Area appears above the Tabs Area.

Presence states include:
- Available (Green)
- Busy (Red)
- Unknown (Gray)
  Note: Presence services must be enabled by the system administrator.

Section I: Queue Tab

The Queue Tab enables operators to check their status in one or more queues. Operator statuses include:
- Gray = not logged in.
- Green = logged in.
- Red = Calls per operator rate is higher than threshold set (threshholds are configured by administrator). Seeing a Queue with Red status means that additional staff are needed immediately to reduce caller hold times.

Operators can login/logout of an individual queue by:
- Clicking on the individual queue.
- Right-clicking on the queue and selecting login or logout.

Operators can login/logout of all the queues by using the Login/Logout button on the Phone Control Bar.

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